## How to Change the Display of a Portlet

1. To **temporarily** change how information is **listed**, hover over a column header until a down arrow appears. Click the arrow, then select from the menu to:

   - Sort in ascending or descending order
   - Show/hide the columns that appear in the list
   - Apply a filter to display only certain types of information

   Note: These changes apply to the current session only
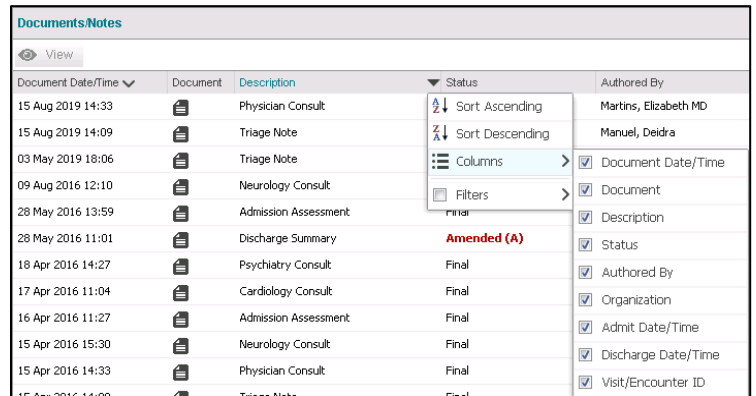
2. To **permanently** change your view preferences (for columns that are not locked):

   a. Click **Preferences**, then click **List Display Settings**

   b. To show/hide columns, select an item in **Available Columns**/**Displayed Columns**. Click **Display/Hide**

   c. To change the order in which the columns appear, select the item. Click **Move Up** or **Move Down**

   d. To change the **Default Sort Column**, click the down arrow, then select an item from the list

   e. Click the **down arrow** to select the sort order
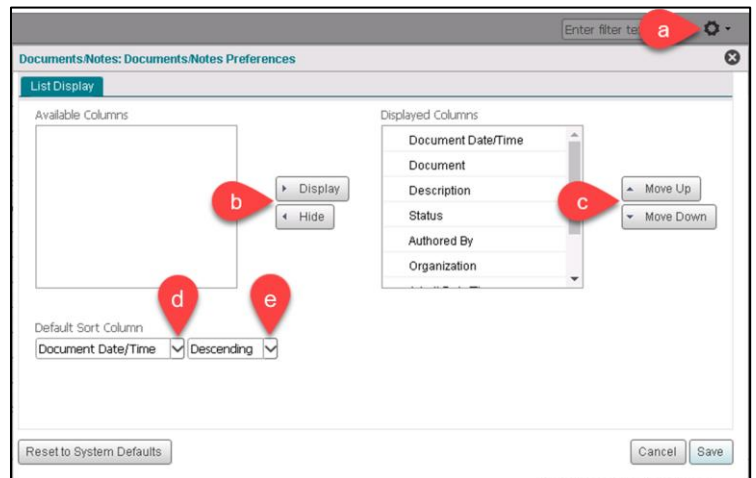
How to Set Timeline Preferences

To permanently change the timeline for all patients and for every time you log in:

1. On the **Timeline**, click **Preferences**, then **General Settings**

2. In Timeline Preferences:

   a. Select the desired default time interval

   Note: It is not possible to select a custom interval

   b. Select the desired encounter types to be display

   c. Click **Save**

   d. Click Reset to System Defaults to permanently return to original Timeline preferences

3. The Timeline refreshes to reflect the preferences set.

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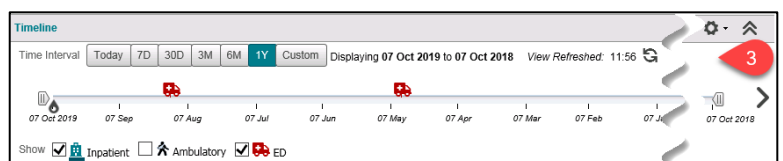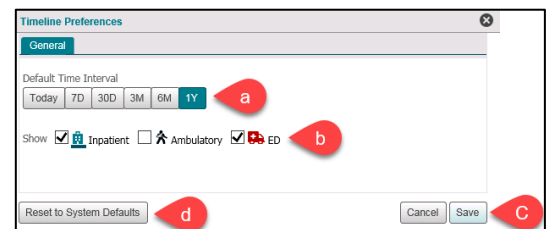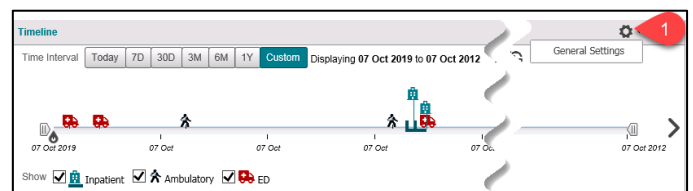
How to Use Custom Views (My Views)
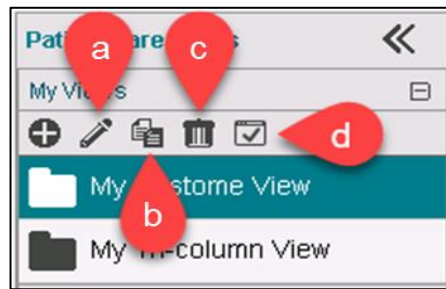
Creating a Custom View

1. From the Patient Care tab, click the **double arrow** on the top of the navigation bar to expand it

2. Click the ⊕ **Add New** icon

    Note: If the **Add New** icon is not visible, click the **My Views** heading or the 🔲 expand icon

3. Click **Single Column Layout** or **Three Column Layout**.

4. Choose the portlets for your custom view:
    a. Select an available portlet, then click **Add**
    OR
    b. Drag and drop a portlet into the **Clinical View Layout** frame

5. Enter the **Name** of your new view

6. Enter a **Description** of the view, as needed (optional)

7. Select an appropriate **Icon** for the view

8. To change the columns displayed in the portlet:
    a. Click the **Preferences** ⚙ ˅ icon and select **List Display Settings**
    OR
    b. Three-column layout: Click the Actions ☰ ˅ icon and select **Preferences > List Display Settings**

9. To change the order of portlets:
    a. Drag and drop the portlet above or below other portlets
    OR
    b. Click the up and down arrows

10. To remove a portlet from the view, click the **Remove** icon. In Three Column Layout click ☰ ˅ button to display the **Remove** icon

11. Set the new view as your default clinical view, as needed

12. Click **Save**
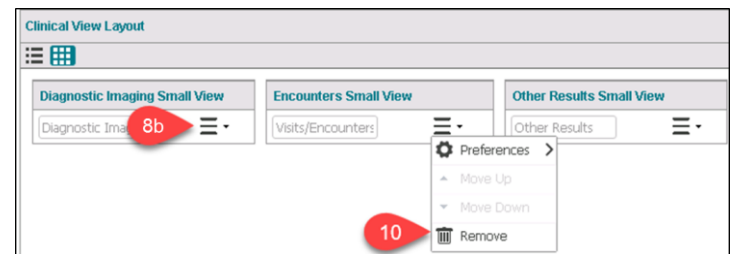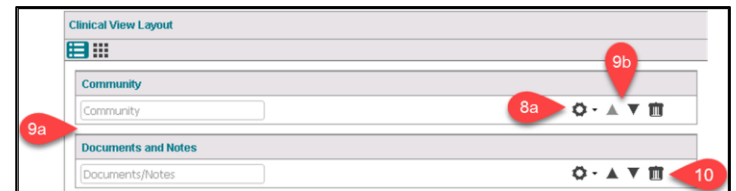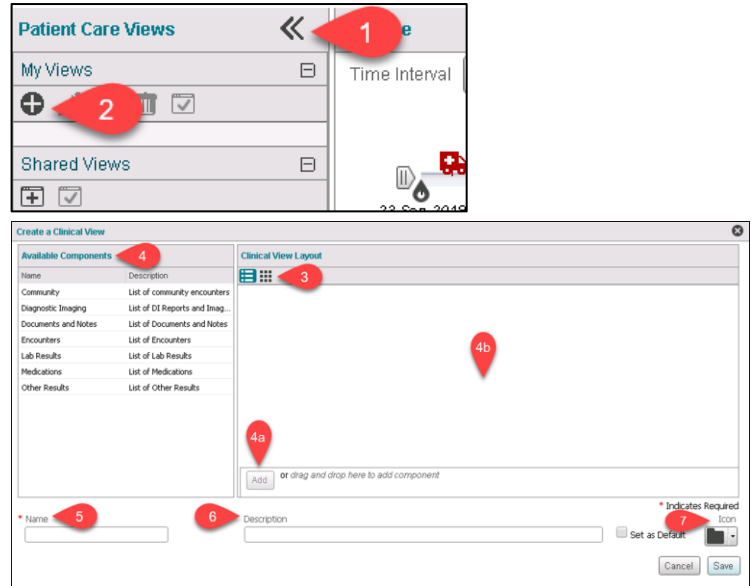
Reminder: By default, the Timeline and Patient Banner display as the first two components at the top of any view and cannot be removed or modified. Remove any unnecessary portlets and/or columns to minimize avoidable viewing of personal health information (PHI). It will still be possible to click on a tab or record to display all information.

Working with Custom Views

1. With the navigation bar expanded, select a custom view, then perform one of the following actions:
   a. **Edit** the view in order to select a different layout, add/remove portlets, change the name, etc. (Follow steps 3-12 of Creating a Custom View)
   b. **Duplicate** a view to create a copy of the selected view that you can then use for another purpose
   c. **Delete** a view that is no longer needed
   d. **Set** the selected view as the default view

Note: To change the layout of a clinical view, edit the view and Select Single Column layout or Three Column Layout. You will need to add the Available Portlets back into the Clinical View Layout frame.

Creating a Custom View from a Shared View

Shared Views are predefined clinical views. Although Shared Views cannot be modified, you can create your own customized version under My Views.

1. With the navigation bar expanded, select a shared view
2. Click **Add to My Views**
3. Select the copy from the My Views list
4. Click **Edit** to customize the view (Follow steps 3-12 of Creating a Custom View)

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