

How to filter and group in the Documents clinical domain

NOTE: Images in this document are a visual representation only. Your system view may appear slightly different.

The flexibility to arrange data to suit your needs is critical. This guide provides you information on filtering and grouping within the Documents clinical domain.

- [Where are the key group and filter elements](#)
- [How to Increase the Date Range of viewable data](#)
- [How to turn Group function off, and how it changes the data view](#)
- [How to Group data by facility](#)

Step 1 | Where are the key group and filter elements

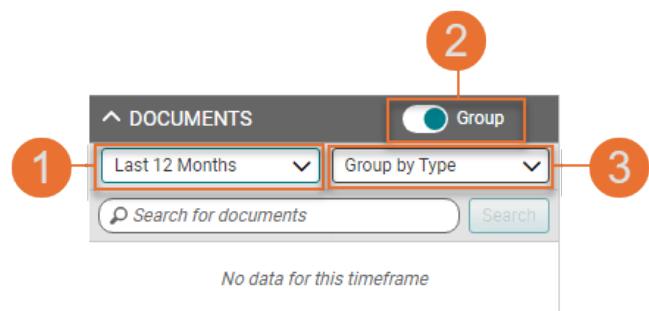
- 1 Expand the Documents group and locate the Date Range choice field.

By default, the Date Range choice field is set to **Last 12 months**.

- 2 Locate the Group toggle button.
By default, this is set to **Group**.

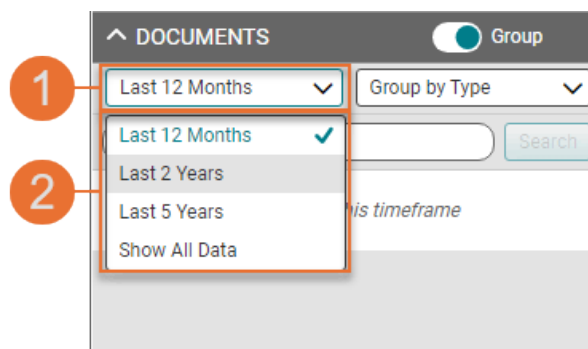
- 3 Locate the **Group by** choice field.

By default, this is set to Group by Type.



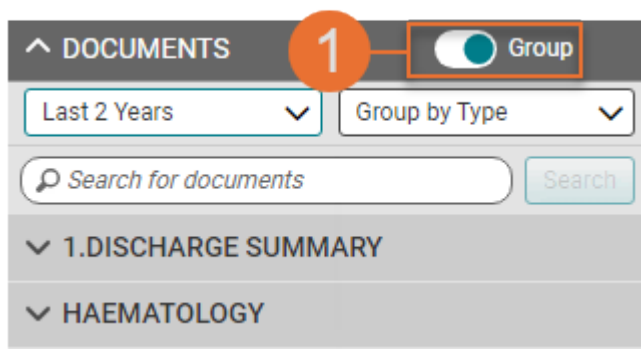
Step 2 | How to Increase the date range of viewable data

- 1 Click on the Date Range choice field.
- 2 Select one of the available options.



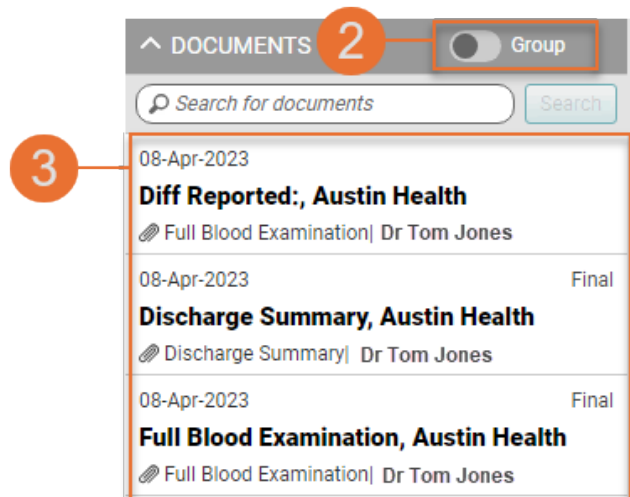
Step 3 | How to turn Group function off and change the data view

- 1 Click on Group toggle button.



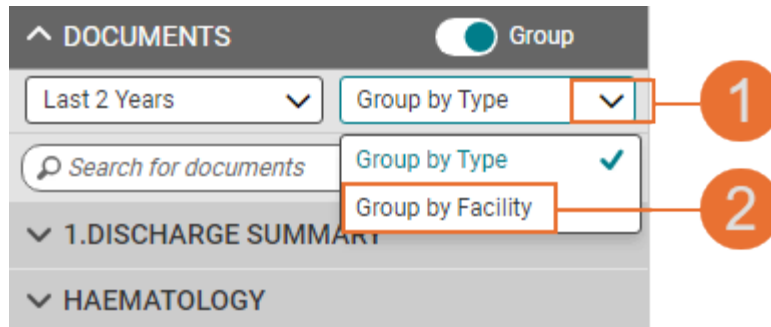
- 2 The Group toggle button displays as being off.
- 3 The Documents cards are now presented with data from most current date.

The Group function can be turned back on by again clicking on the Group toggle button.



Step 4 | How to show Group data by facility

- 1 Click on Group by choice field.
- 1 Select Group by Facility.



- 3 The Documents cards are now presented with data grouped by facility, with most current date first.

