

Important Content Update Message
 We are currently updating the OP Help Center content for the release of OP 20. We appreciate your patience as we continue to update all of our content. To locate the version of your software, navigate to: **Help tab > About**.

Grouping Data

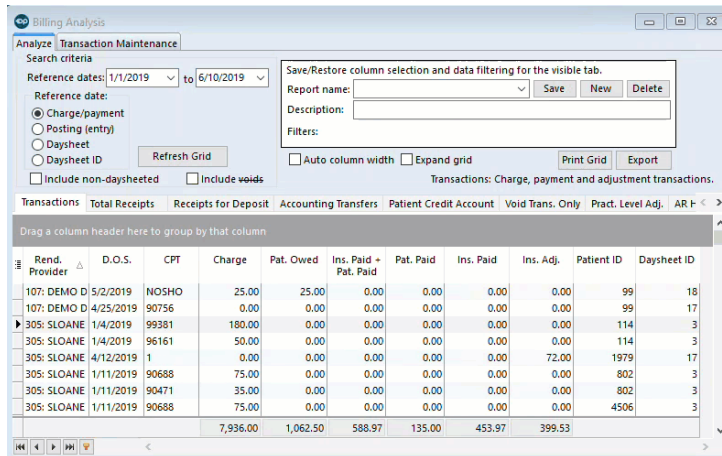
Last Modified on 06/05/2020 8:22 am EDT

Version 14.19

Grouping Data

In OP, you have the capability of managing how you would like to see data grids grouped. This capability is especially helpful when viewing reports. The image below provides an example on how to group data. To group data:

1. Access the location where you would like to group the data.
2. Locate the column header that you would like to group your data by. If using this feature in a report within OP, it may be useful to click the **Refresh Grid** button to populate your report data prior to grouping.
3. Click the desired column header. Then, drag and drop the header into the dark grey area that says 'Drag a column header here to group by that column'.
 - To remove a grouping, drag the column header from the grey area back to the report grid.
 - If you accidentally remove the column completely, you may add it back into the data table by using the **Show/Hide columns** button.
4. If you'd like to save the grouping, click the **Personalize** tab and the **Save Active Form** button to save the settings for the Active window. To unsave your preference, click **Clear Active Form** button in the **Personalize** tab.



Version 14.10

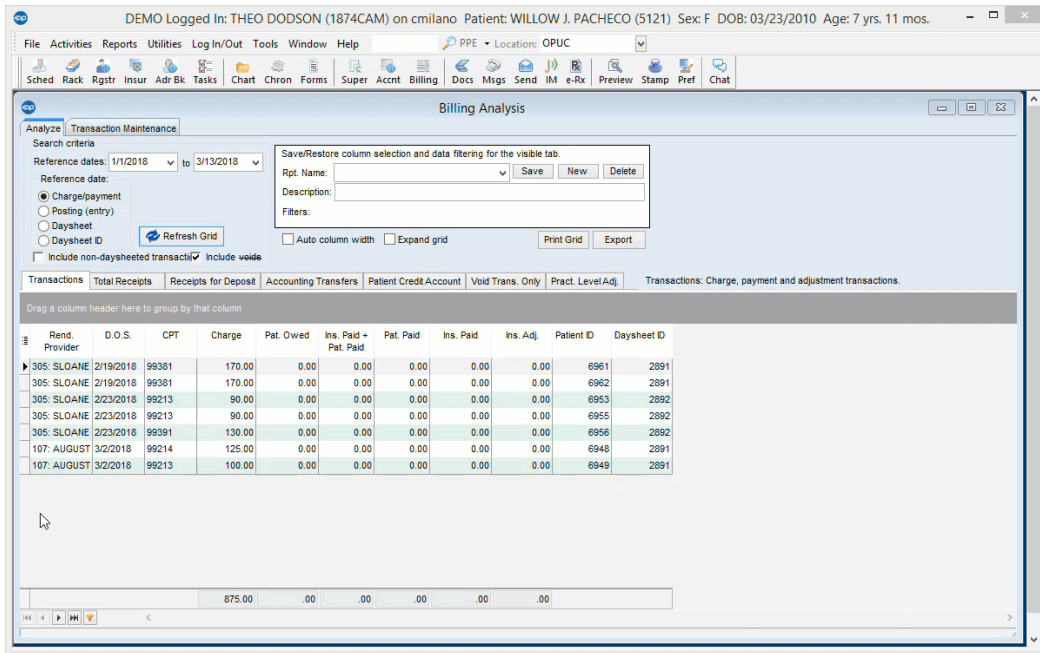
Grouping Data

In OP 14 you have the capability of managing how you would like to see the data grouped. This capability is especially helpful when viewing reports. The image below provides an example on how to group data. To group data:

1. Access the location where you would like to group the data.
2. Locate the column header that you would like to group your data by.
 - If using this feature in a report within OP, it may be useful to click the **Refresh Grid** button to populate your report data

prior to grouping.

3. Click the desired column header. Then, drag and drop it into the dark grey area that says 'Drag a column header here to group by that column'.
 - To remove a grouping, simply drag the column header from the grey area back to the report grid.
 - If you accidentally remove the column completely, you may add it back into the data table by using the **Show/Hide columns** button.
4. If you'd like to save the grouping, click the **Pref** button in the smart toolbar to save the settings for the Active window.
 - To unsave your preference, hold **CTRL** on your keyboard, and click the **Pref** button. Then, confirm your change.



DEMO Logged In: THEO DODSON (1874CAM) on cmilano Patient: WILLOW J. PACHECO (5121) Sex: F DOB: 03/23/2010 Age: 7 yrs. 11 mos.

File Activities Reports Utilities Log In/Out Tools Window Help PPE Location: OPUC

Sched Rack Rgstr Insur Adr Bk Tasks Chart Chron Forms Super Acct Billing Docs Msgs Send IM e-Rx Preview Stamp Pref Chat

Analyze Transaction Maintenance

Search criteria

Reference dates: 1/1/2018 to 3/13/2018

Reference date: Charge/payment Posting (entry) Daysheet Daysheet ID Refresh Grid

Save/Restore column selection and data filtering for the visible tab.

Rpt. Name: Save New Delete

Description:

Filters: Auto column width Expand grid Print Grid Export

Transactions Total Receipts Receipts for Deposit Accounting Transfers Patient Credit Account Void Trans. Only Pract. Level Adj. Transactions: Charge, payment and adjustment transactions.

Drag a column header here to group by that column

#	Render Provider	D.O.S.	CPT	Charge	Pat. Owed	Ins. Paid + Pat. Paid	Pat. Paid	Ins. Paid	Ins. Adj.	Patient ID	Daysheet ID
▶ 305:	SLOANE	2/19/2018	99381	170.00	0.00	0.00	0.00	0.00	0.00	6961	2891
305:	SLOANE	2/19/2018	99381	170.00	0.00	0.00	0.00	0.00	0.00	6962	2891
305:	SLOANE	2/23/2018	99213	80.00	0.00	0.00	0.00	0.00	0.00	6953	2892
305:	SLOANE	2/23/2018	99213	90.00	0.00	0.00	0.00	0.00	0.00	6955	2892
305:	SLOANE	2/23/2018	99391	130.00	0.00	0.00	0.00	0.00	0.00	6956	2892
107:	AUGUST	3/2/2018	99214	125.00	0.00	0.00	0.00	0.00	0.00	6948	2891
107:	AUGUST	3/2/2018	99213	100.00	0.00	0.00	0.00	0.00	0.00	6949	2891
				875.00	.00	.00	.00	.00	.00		