Saving and Clearing Saved Preferences

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Version 14.19

Overview

Users can choose to save preferences to streamline their workflows. Some examples of preferences that can be saved include displaying what window opens when opening a patient's chart or changing the button order in the patient chart. If necessary, and at any time, a user can choose to clear their saved preferences. The following buttons are found in the Personalize tab in OP and are explained below:

- Save Active Form
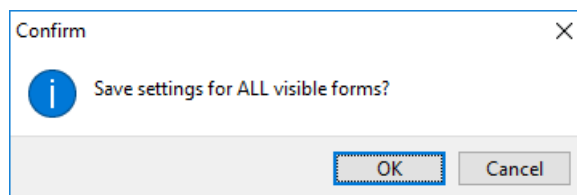- Clear Active Form
- Save Desktop
- Reset Desktop
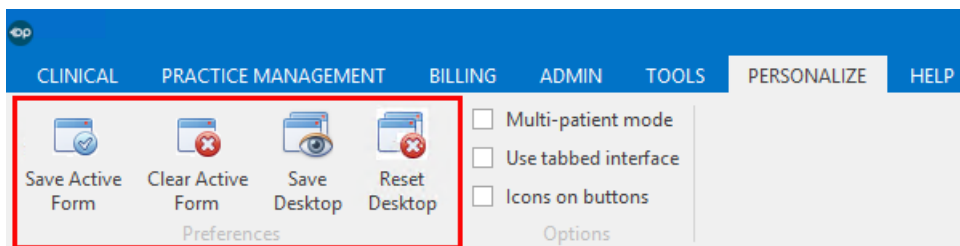
Save Preferences

- **Save Active Form:** This button is used to save the preferences for the forward-most or selected window in OP.

  1. With the window for which you would like to save your preferences or window position open, navigate to the **Personalize** tab, and click the **Save Active Form** button. An information window is displayed.
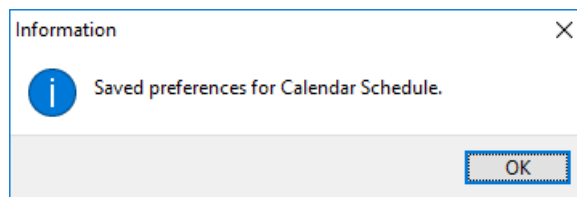
  2. Click **OK** in the information window. The change is immediately saved.

- **Save Desktop**: This button is used to save the preferences of all opened windows and the Main Navigation Panel.

  1. With all open windows configured as you prefer, navigate to the **Personalize** tab, and click the **Save Desktop** button. A confirmation window is displayed.
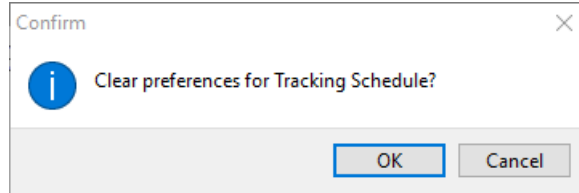

  2. Click **OK** in the confirmation window. The change is immediately saved.

Clear Saved Preferences

- **Clear Active Form:** This button is used to clear the preferences for the forward-most or selected window in OP.

  1. With the window for which you would like to clear your preferences or window position open, navigate to the **Personalize** tab, and click the **Clear Active Form** button. A confirmation window displays.
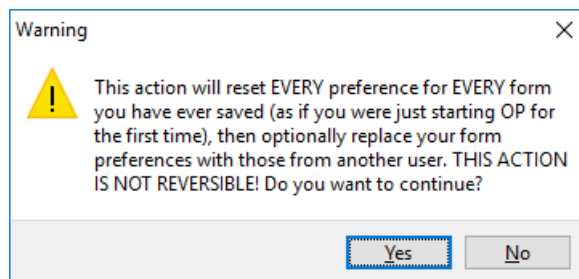

  2. Click **OK** in the confirmation window. An information window displays stating the default settings have been restored.
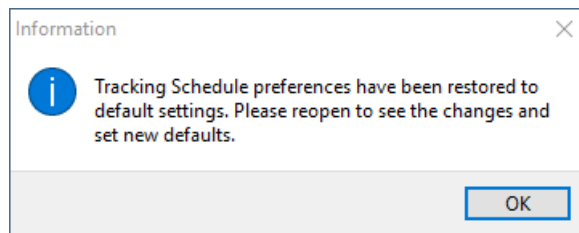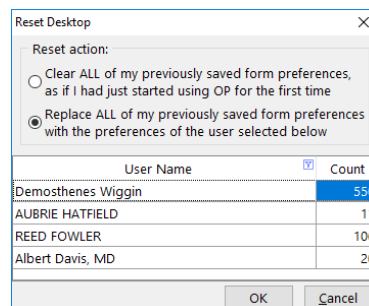

  3. Click **OK** in the information window.
  4. Log out and back in to see the changes.

- **Reset Desktop:** This button provides the user the ability to clear all current preferences and then replace those preferences with those from another user. This does not change permissions. It only changes personalizations.

  1. Navigate to the **Personalize** tab, and click the **Reset Desktop** button. A warning window is displayed.

  2. Click **Yes**. The **Reset Desktop** window displays.

  3. Select a **reset action** radio button.
  4. Click the **OK** button. An Information window displays.
  5. Click **OK**.

6. Log out of and close OP.
7. Relaunch OP and log back in to see the changes.

Version 14.10

All users have access to the **Pref** Button ( ) on the Smart Toolbar and within some windows in OP 14. This button can be used to save settings and views as the individual user has established them. Some of the preferences that can be saved include: visible columns, sorting of lists, grouping of data, ordering of tabs, window size, and window placement.

Saving Preferences

To save preferences:

1. Organize or construct the window how you would always like to see it.
2. Click the **Pref** button in the Smart Toolbar.
3. Select Active or All:

   - Select **Active** to save preferences for the active window.
   - Select **All** to save preferences for all windows currently open in OP.

Reverting Saved Preferences

To revert saved preferences:

1. Navigate to the window where you would like to revert saved preferences.
2. Hold **CTRL** on your keyboard, and click the **Pref** button on the Smart Toolbar.
3. Confirm that you would like to clear your preferences.

✅ **Note**: Reverting saved preferences will only apply to the Active window.