

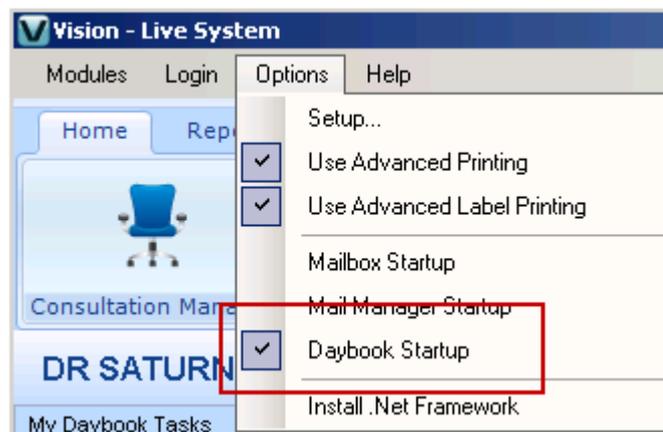


## Daybook - Personal Set up

The following are options that you can use to personalise your Daybook screen:

### Setting Daybook to open automatically

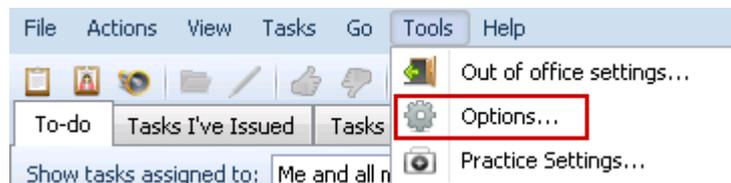
Daybook does not, by default, open automatically when you log into Vision. To set it to open automatically for your Vision account; from the Vision front menu, select **Options** and click **Daybook Startup**.



*Vision front screen - Options - Daybook Startup*

### Options

There are three tabs to allow you to personalise the way the Daybook tabs and tasks look. From **Daybook**, click  and select **Tools - Options**.



*Daybook - Tools - Options*

The Daybook Options screen is displayed:

- [Start up and Alerts](#) (page 1)
- [Lists](#) (page 2)
- [Tasks](#) (page 3)

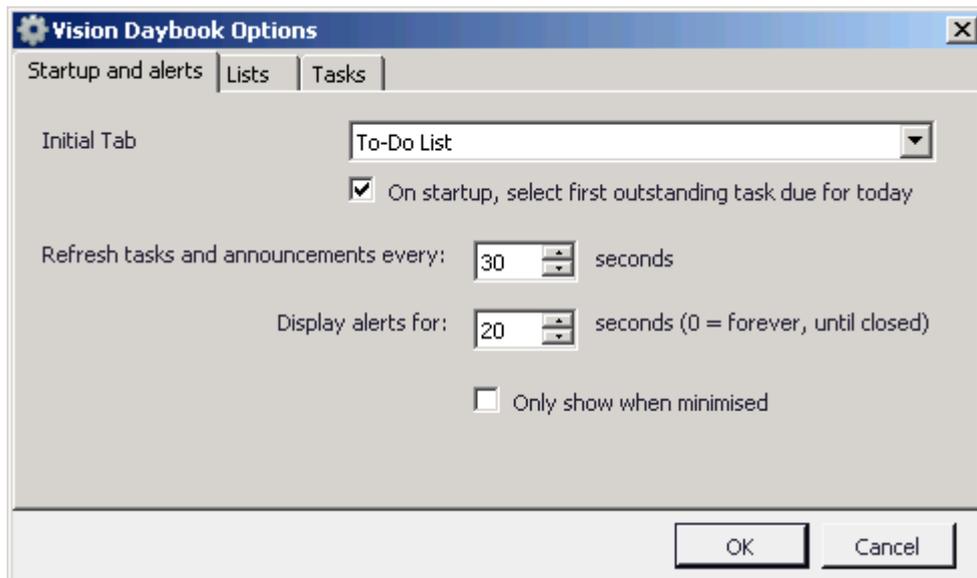
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 **Remember** - These settings are personal to your Vision account, not practice wide.

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## Start up and Alerts

From the Startup and Alerts tab:



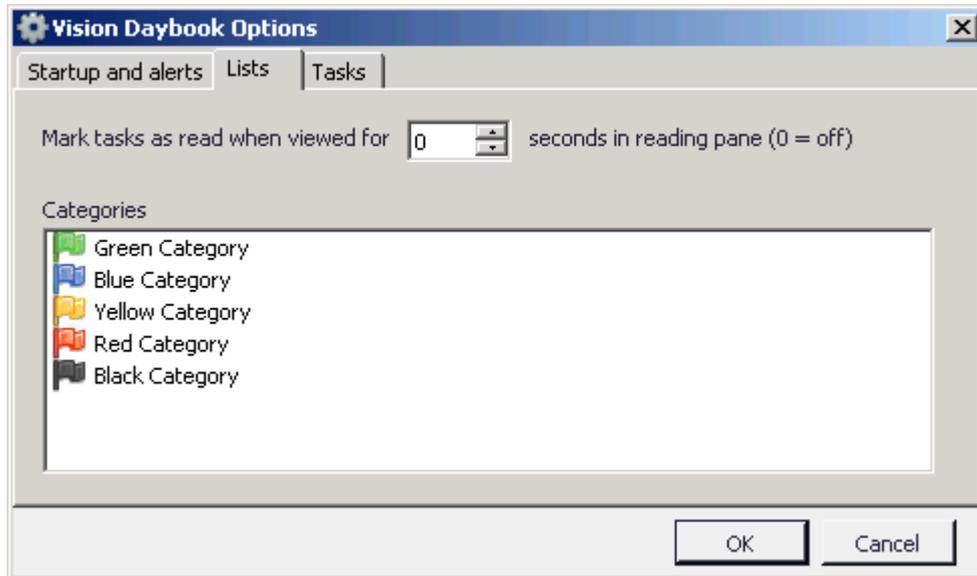
### *Daybook Options - Start up and alerts defaults*

- **Initial Tab** – Allows you to select the tab you wish to be initially presented with:
  - **To-Do** – lists outstanding tasks.
  - **Tasks I've Issued** – lists tasks you have created.
  - **Tasks I've Actioned** – lists completed tasks.
  - **All Outstanding Tasks** – lists all outstanding tasks for all staff.
  - **Tasks for Patient** – lists tasks for a specific patient.
  - **Announcements I've Sent** – lists announcements you have sent.
- **On startup, select first outstanding task due for today** – Tick to display tasks that need to be dealt with today as the starting point within Daybook.
- **Refresh tasks and announcements every** – Using the up and down arrows, select a time period for Daybook to be refreshed.
- **Display alerts for** – Select a time for the system tray balloon tips (alerts) to display by using the up and down arrows. To set the alerts to stay on screen until manually closed, set to 0.
- **Only show alerts when minimised** – Tick this if you only require an alert to appear when Daybook is not maximised.



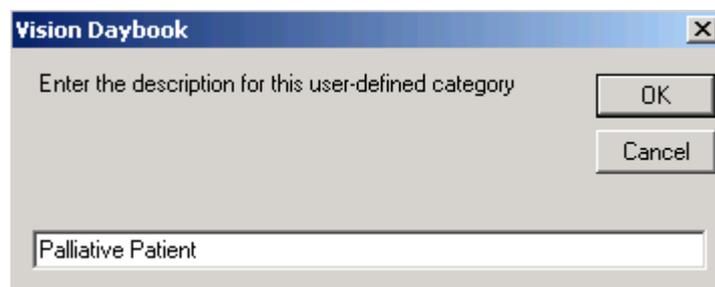
## Lists

From the List tab:



*Vision Daybook - Options - To-Do List tab*

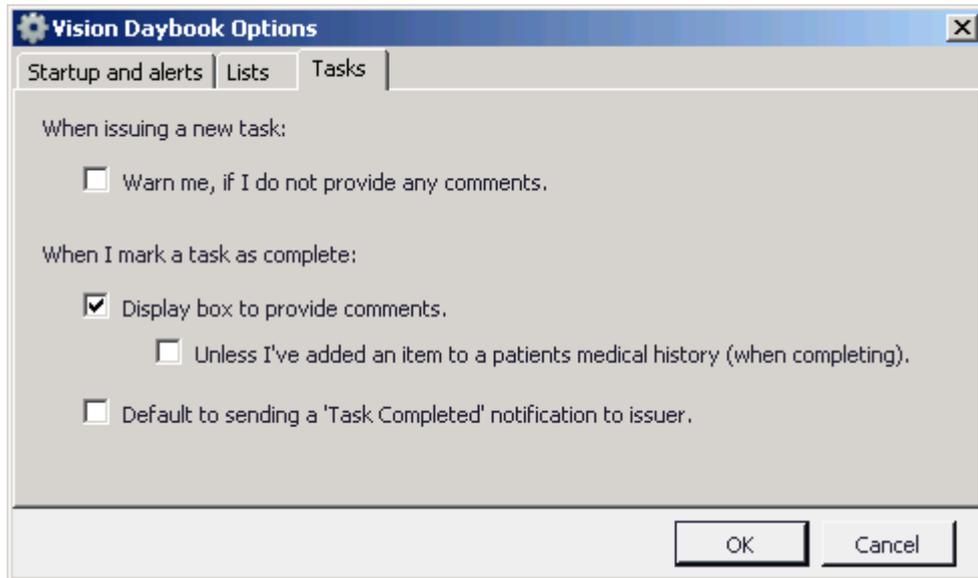
- **Mark tasks as read when viewed for nn seconds in reading pane**  
- Select the amount of time to view a task, by using the up and down arrows, before it is automatically marked as read (where nn is a number). Enter 0 to turn this option off and use the right click option to mark as Read.
- **Categories** – Each user can categorise their own tasks for their own reference using different colour flags. The text associated with the flags is initially based on the colour of the flag, it is changed by right clicking on the flag and selecting **Rename**. Type in the new text and then click **OK** to save and close.



*Right click Rename.*

## Tasks

From the **Tasks** tab you can set the following personal options for your individual Vision account:



### *Daybook Options - Tasks tab defaults*

- **When issuing a new task:**
  - Warn me, if I don't provide any comments - Select to prevent yourself from sending tasks with no comments.
- **When I mark a task as complete:**
  - **Display box to provide comments** - Tick to automatically display a comments box when you complete a task, this can be a useful option for audit purposes.
  - **Unless I've added an item to a patients' medical history (when completing)** - If you have selected the "Display box to provide comments" option, you can tick this option if a medical history entry has been automatically made, as an additional comment should not be necessary for audit purposes.
- **Default to sending a 'Task Completed' notification to issuer** - Tick to send a completion notification to the originator of a task each time you complete a task.



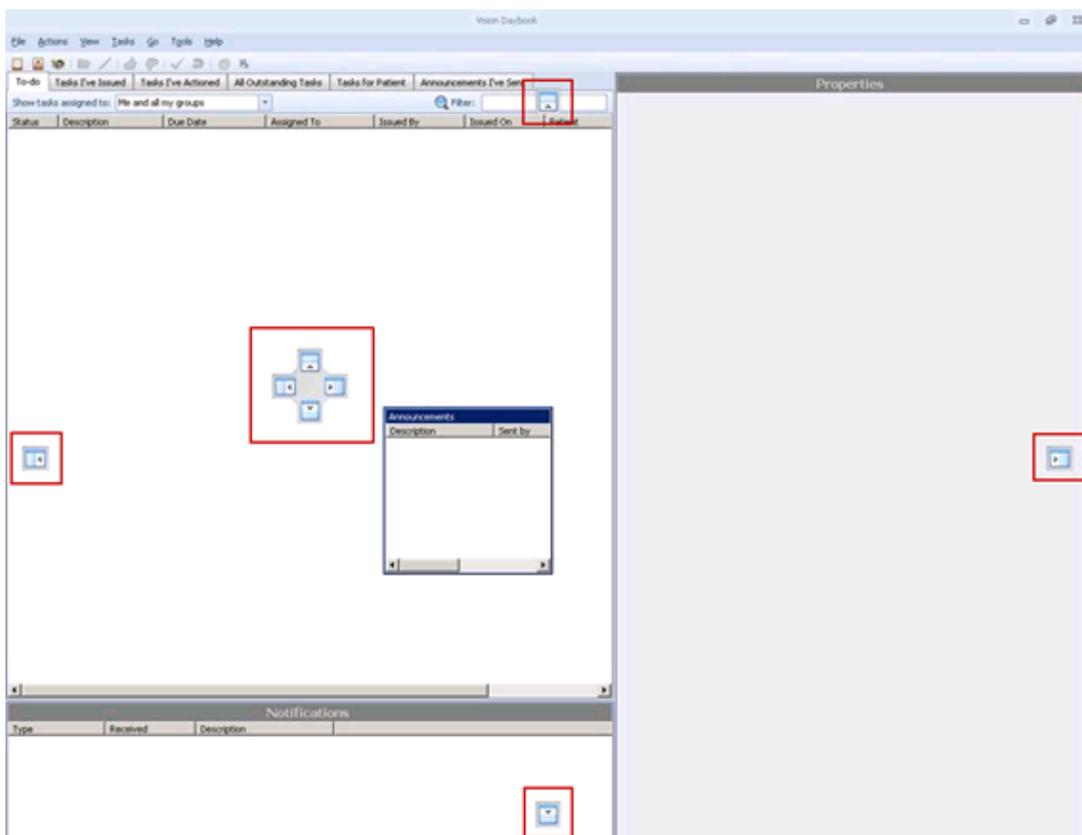
## Changing the look of Daybook

From **Daybook - View** there is a padlock button:

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**Unlocked Lock window layout - Unlocked** - You can change the positions of the panes.
- 
**Lock window layout - Lock** - The panes are locked and cannot be moved.

To rearrange the various panes within your personal Daybook screen:

- Ensure the padlock button is  **Unlocked**, if not click on the  **Lock** to release it.
- Click and drag the pane you wish to move.
- Compass type arrows appear in the middle and at the edges of the screen.



*Compass type arrows*

4. Drop the pane you want to move on to the arrow displaying the position you require.
5. Repeat the moving process until the screen is displayed the way you require.



6. Click Lock to save the screen.



If you have locked the current layout the Lock button is displayed in gold ,



click to release the lock and to be able to move the panes again.