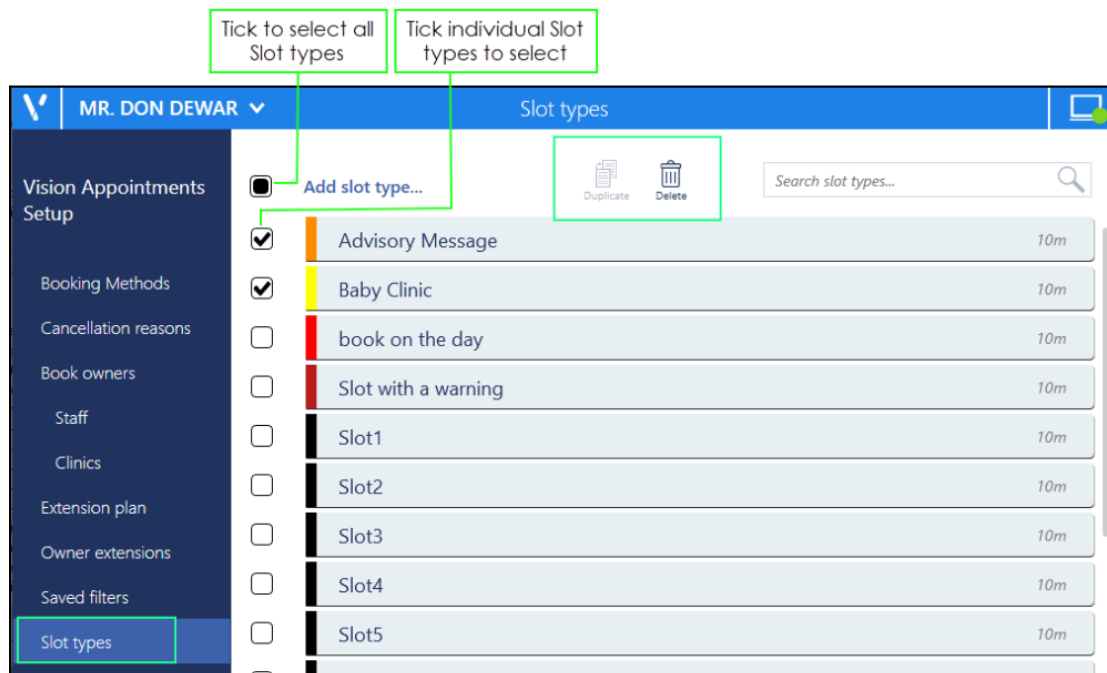


Vision Appointments Setup Release v3.0

Vision Appointments Setup release v3.0 contains the following updates:

- **Slot Types** - From the **Slot types** screen, you can now tick multiple **Slot types** to access an additional toolbar:



- **Vision Appointments from your Desktop** - Where appropriate, for example in a shared care setting, you can now log into **Vision Appointments Setup** directly from your desktop.

➔ See [Logging onto Vision Appointments Setup from your Desktop](#) on page 5 for details.

- **Click Once Installation Package** - This process simplifies the installation and update process for **Vision Appointments Setup**. When a new version becomes available, Vision informs you of this and releases the upgrade from our central servers. The next time each user logs into **Vision Appointments Setup**, they are asked if they want to run the update and then they simply follow the installation wizard. This does not require administrator access to the workstation.

 **Note** - This is not compatible with the Chrome browser.

➔ See [Installing a Vision Appointments Setup Update](#) on page 7 for details.

Preparing for Desktop Vision Appointments Setup for Vision Practices

Before anyone can login to **Vision Appointments Setup** from their desktop, they need to have an email address set up in Vision 3.

Why does this need to be done?

- All Vision apps use a staff member's registered email address as their unique user name.

The email addresses together with Vision passwords and linked staff details are transferred into Vision 360 ready to be used when any app is enabled.

Who needs to do this?

- Email addresses in Vision 3 are set up and maintained by System Administrators at each practice.

Do users need to use an NHS email address?

- Yes, an NHS email address is required.

Can users share email addresses?

- No, every **Vision Appointments Setup** user must have their own email address.

What happens next?

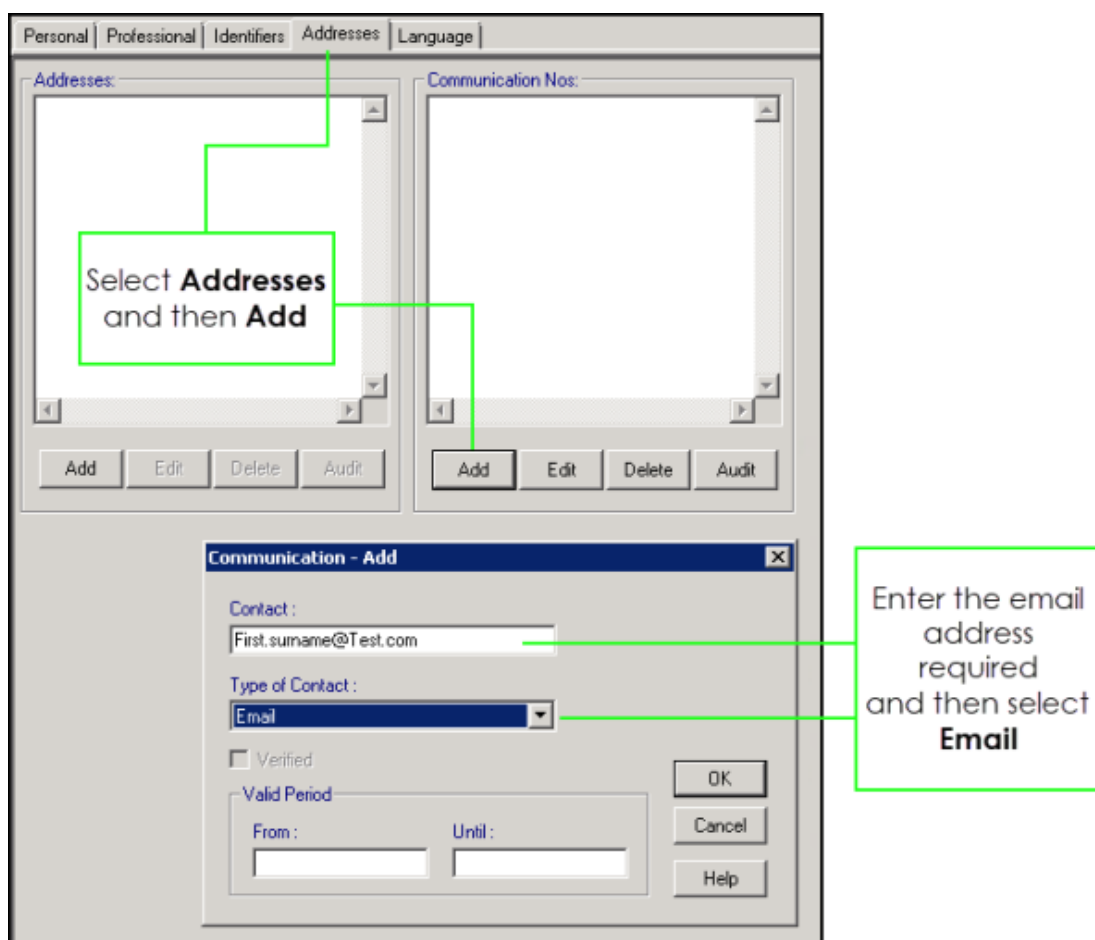
- Once all user details have been transferred into Vision 360, your practice can be configured to use **Vision Appointments Setup** from the desktop. Depending on whether your patient's clinical data is already being streamed into the Vision 360, there may be a short delay before **Vision Appointments Setup** is ready to use from the desktop.

How do I add/maintain email addresses?

Each user who needs to use **Vision Appointments Setup** must have their email address set up in **Control Panel - File Maintenance - Staff - Communications Numbers**.

To add an email address:


1. From **Vision 3**, select **Management Tools - Control Panel - File Maintenance - Staff**.
2. Right-click on the staff member required and select **Edit Staff**.
3. Their **Personal** tab displays, select the **Addresses** tab.
4. Under **Communication Nos**, select **Add** and the **Communication - Add** screen displays:




5. Complete as required:
 - **Contact** - Enter the staff member's email address
 - **Type of Contact** - Select **Email**
6. Select **OK** and then **OK** again, in the main staff window, to save your changes.

Repeat this process for every member of staff who needs access to **Vision Appointments Setup**.

User details transfer to Vision 360 approximately every twenty minutes. After this short delay your staff members can log into **Vision Appointments Setup**, from the desktop, using their email address as their username and their usual Vision 3 password.

 **Note** - If any staff member has more than one Vision 3 user account, only the preferred user should be updated with the email address, and the password for this user should be used for accessing Vision Appointments Setup. We strongly recommend you inactivate any unused staff accounts.

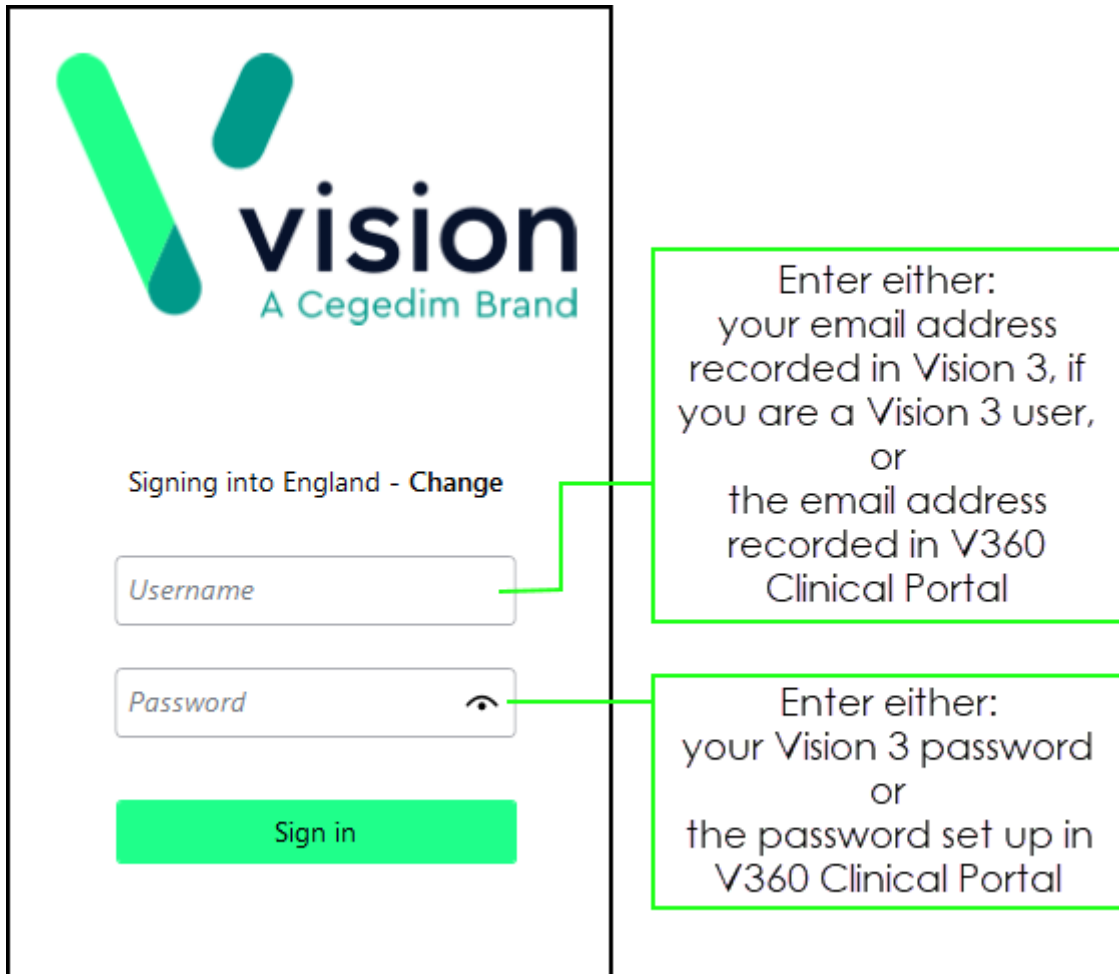
 **Important** - If a staff member is set up in more than one practice with the same email address, their credentials, for example, prescriber code must be set up in each Vision system otherwise it can cause issues.

Logging onto Vision Appointments Setup from your Desktop

To access Vision Appointments Setup from you desktop:



1. From your desktop, double click on **Vision Appointments**.
2. The **Log in** screen displays:

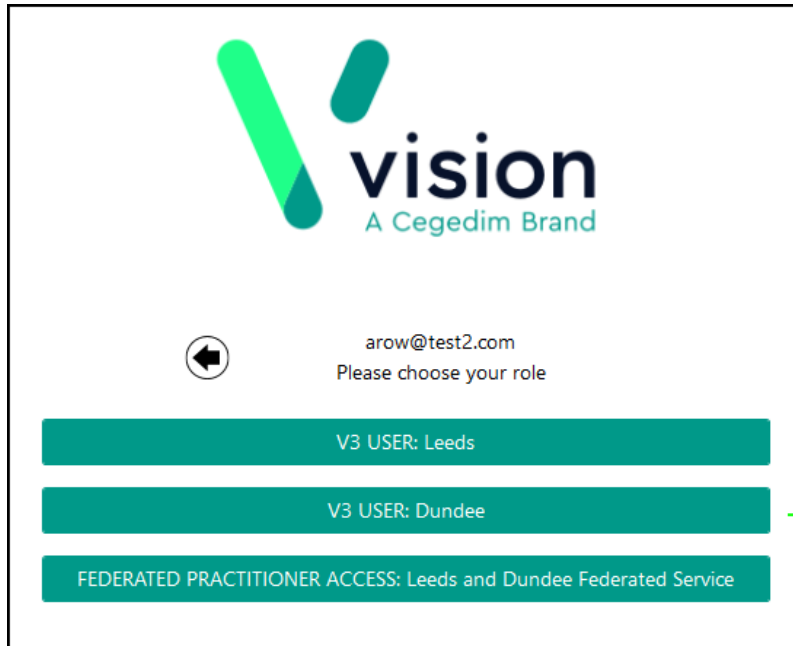


Enter either:
your email address
recorded in Vision 3, if
you are a Vision 3 user,
or
the email address
recorded in V360
Clinical Portal

Enter either:
your Vision 3 password
or
the password set up in
V360 Clinical Portal

3. Enter your email address:
 - **Vision 3 user** - If you use Vision 3, this is the email address set up within **Vision 3 - Control Panel - File Maintenance - Staff**, see [Preparing for Desktop Vision Appointments Setup for Vision Practices](#) on page 2 for details.
 - **Non-Vision 3 user** - If you do not use Vision 3, this email address is added in Vision 360, see [Adding a Shared Care User](#) for details.

4. If you have multiple roles, for example, in a shared care setting, select your role for this session:



The screenshot shows the Vision login interface. At the top is the Vision logo with the text "vision A Cegedim Brand". Below the logo is a back arrow icon and the email address "arow@test2.com". The prompt "Please choose your role" is displayed above three selectable role buttons: "V3 USER: Leeds", "V3 USER: Dundee", and "FEDERATED PRACTITIONER ACCESS: Leeds and Dundee Federated Service". A green callout box on the right points to these buttons with the text "Select from your available roles".

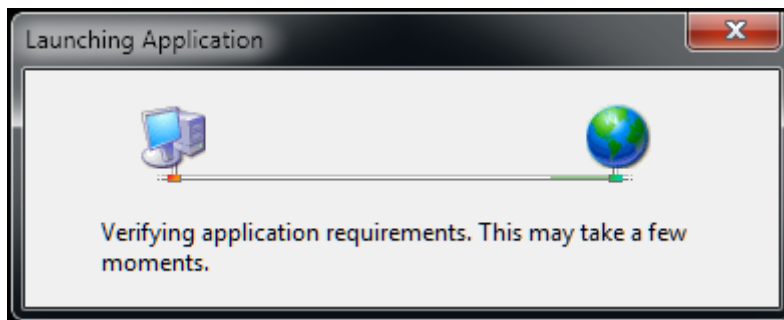
5. The **Extension plan** screen displays ready for use.




Installing a Vision Appointments Setup Update

If you access **Vision Appointments Setup** from your desktop, when an update is available, you are automatically prompted to download and install as follows:

1. From your desktop, double click **Vision Appointments Setup**  in the usual way.
2. The **Launching Application** screen displays for a short while:



3. If an update is available, the **Update Available** screen displays, select **OK** to continue.

 **Note** - If you do not want to load the update, you can select **Skip**. We do not recommend you repeatedly skip an update, as you will not be on the latest version of the software.

4. The **Updating Vision Appointments Setup** screen displays with a progress bar for the download:



5. Once the update completes, **Vision Appointments Setup** opens in the usual way.