Daybook – Personal Set up

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

Options

To set up the options within **Daybook**:
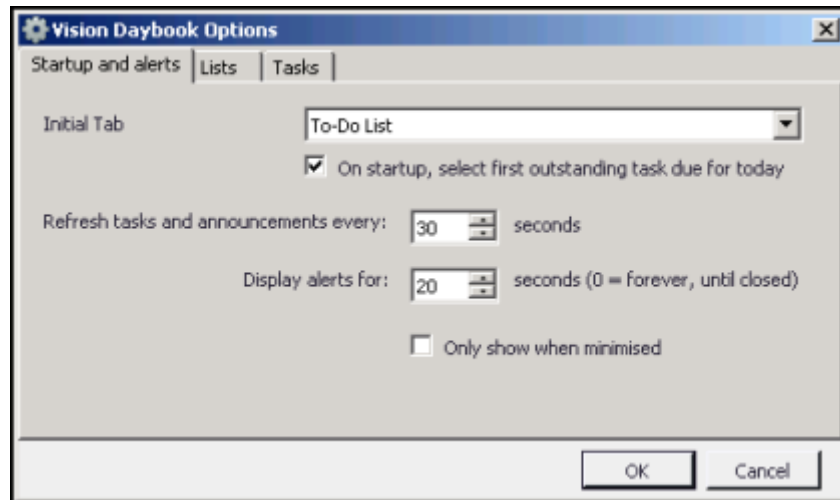
1. From **Daybook**, select the **Maintenance** tab and then **Options** ⚙.
2. The **Daybook Options** screen displays.

There are three tabs to allow you to personalise the way **Daybook** looks:

Start Up and Alerts

From the **Startup and Alerts** tab you can set the following:

- **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** - Defaults to 0 to set the alerts to stay on screen until manually closed. Select a time for the system tray balloon tips (alerts) to display by using the up and down arrows if required.

- **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:
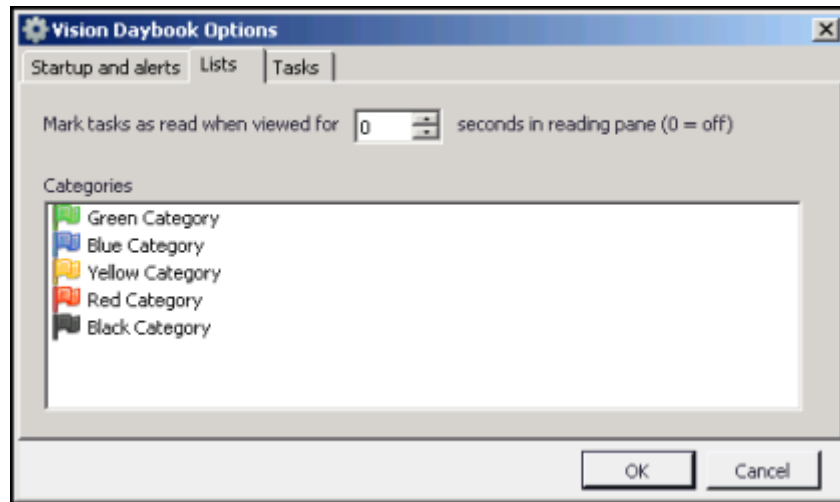
- **Mark tasks as read when viewed for nn seconds in reading pane** - Select the amount of time to view a task, by using the up and down arrows, before it is automatically marked as read (where nn is a number). Enter 0 to turn this option off and use the right click option to mark as **Read.**

- **Categories** – Each user can categorise their own tasks for your 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 select **OK** to save and close:
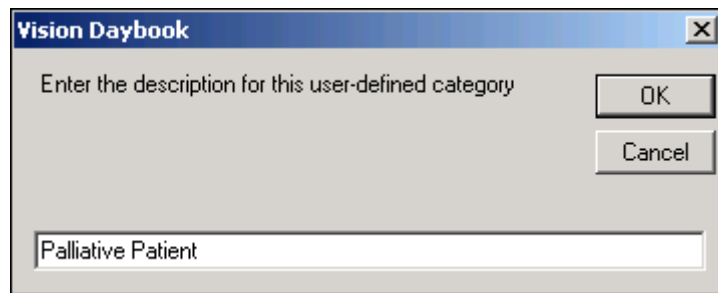
Tasks

From the **Tasks** tab you can set the following personal options for your individual **Vision 3** log in:
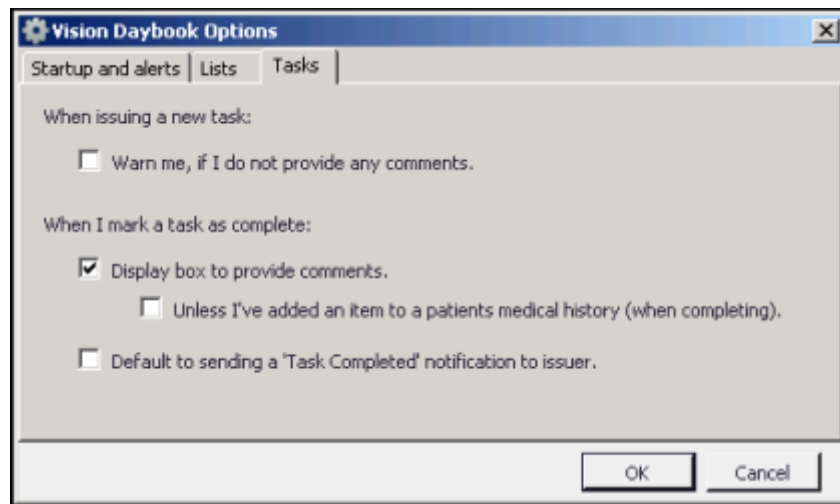
- **When issuing a new task**:

  - **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.

Moving Panes Within Daybook

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

- **Lock window layout - Unlocked** - You can change the positions of the panes.

- **Lock window layout - Locked** - The panes are locked and cannot be moved.

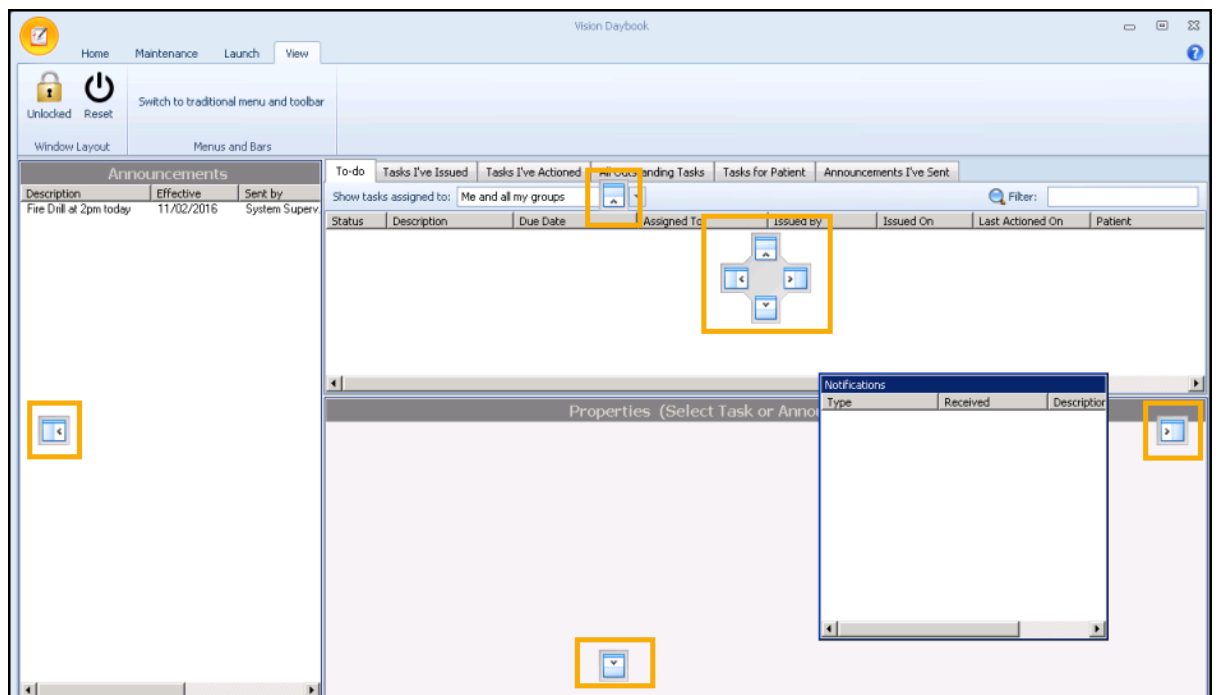To rearrange the various panes within your personal **Daybook** screen:

1. Ensure the padlock button is **Unlocked** , if not select **Locked**

    to release it.

2. Click, hold and drag the pane you wish to move.

3. Compass type arrows appear in the middle and at the edges of the screen:

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 displays the way you require.

6. Select **Unlocked** to save the screen.

Once saved **Locked** displays in gold.

Select **Reset** to return the view to the default settings.