

Visual Outcomes Administration & Configuration Part - 5

Project No. 214548
Job Aid

Job Aid

V.01 Draft
11 November 2014

Prepared by: Eddie Nicolson
Business area: Planning and Projects

Training Manual Structure;

This manual is Part 5 of 6 parts. Version control, sign off and distribution are contained in part 1 only.

Manual No.	Training Manual	Audience
Part 1	Front Desk Operations	VO End Users
Part 2	Front Desk Operations	VO End Users
Part 3	Front Desk Management	VO End Users / Supervisors
Part 4	Advanced Features	VO End Users / Supervisors
Part 5	Administration and Configurations	Administrator
Part 6	Management Reporting	Finance

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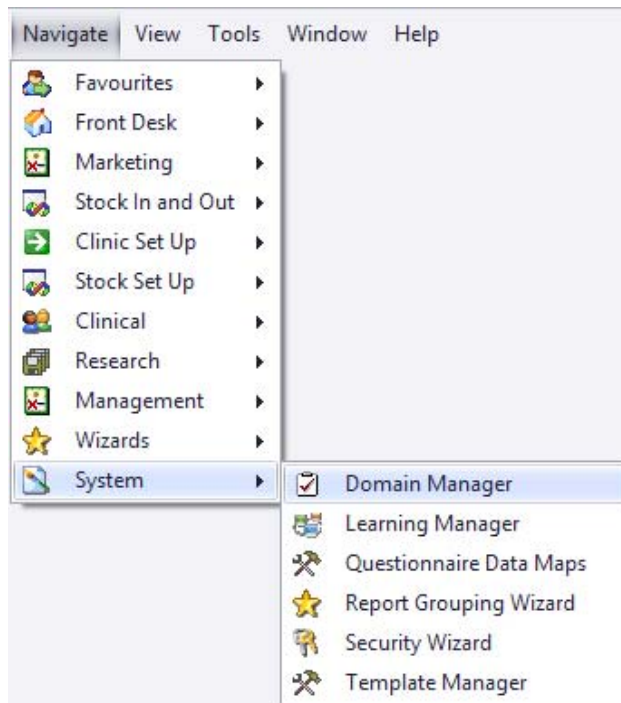
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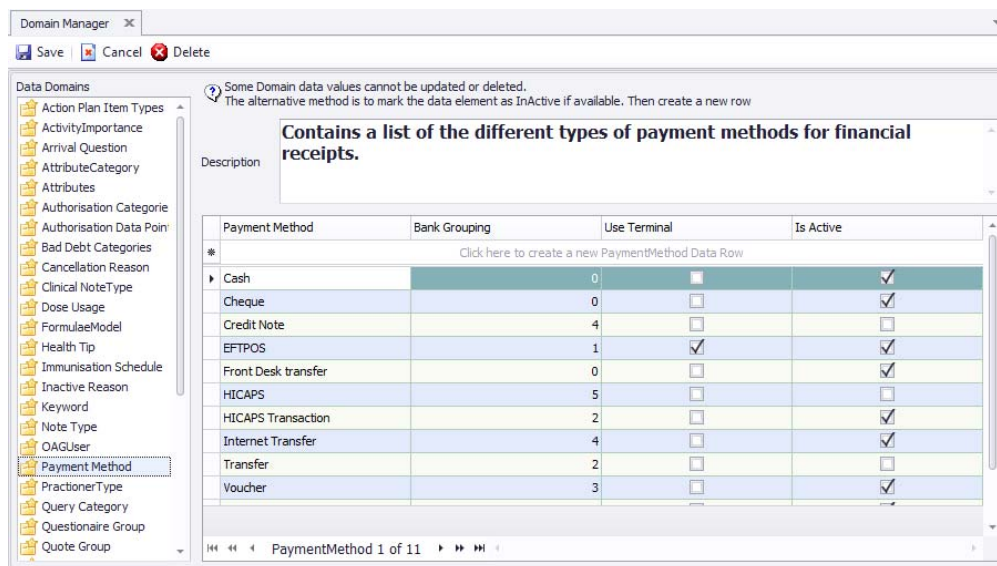
Part 5 focuses on advanced training for staff who have a higher access level or are system administrators.

1. Domain Manager

You can access the Domain Manager, through the System tab in the Navigator:



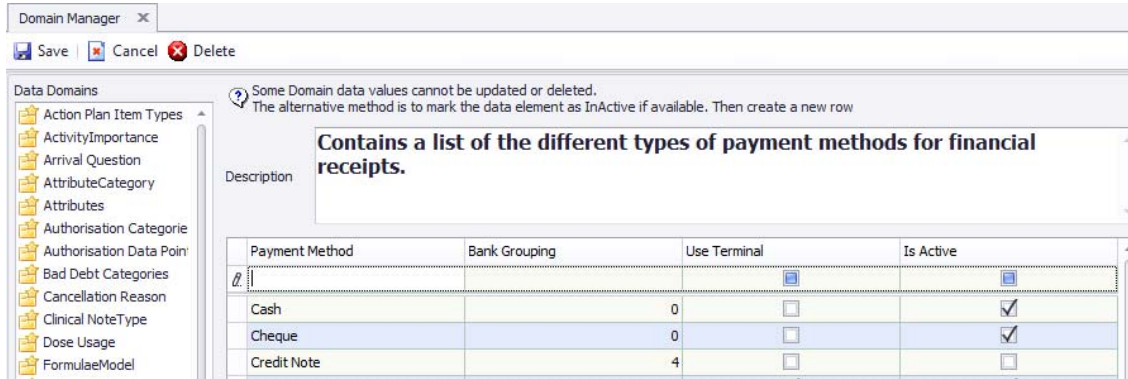
The *Domain Manager* contains the basic foundations for your Practice database.



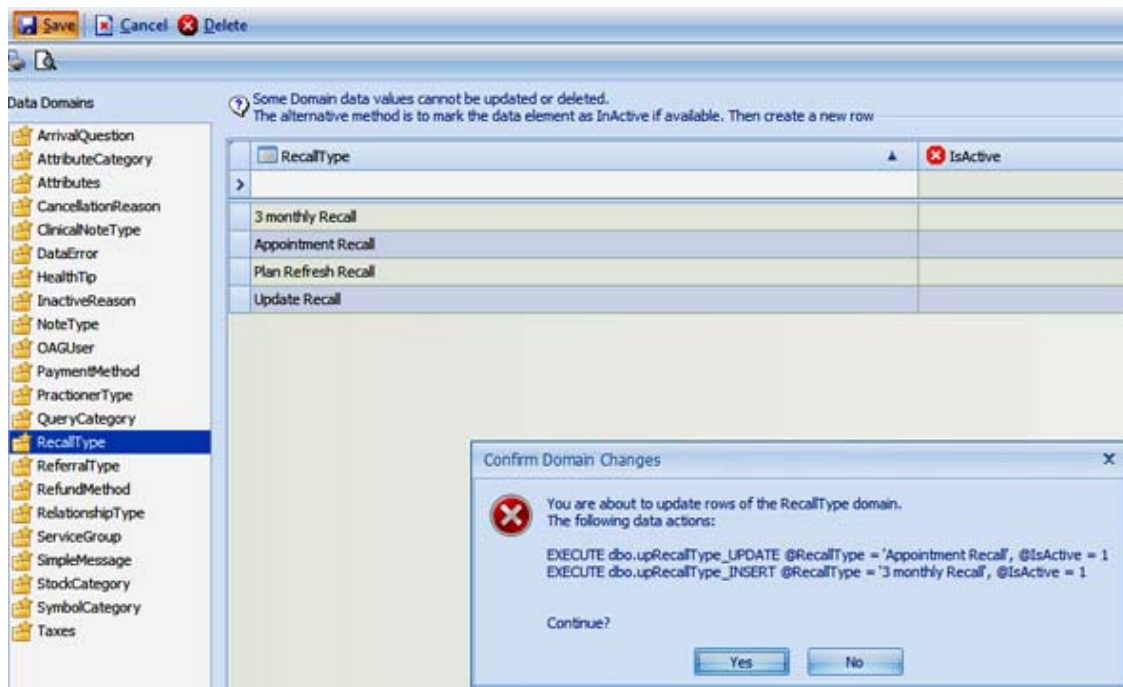
Remember, you can create new Domain subcategories within existing ones, but you cannot delete ones that have been created previously, so please proceed cautiously. You can, however, make any unwanted subcategories 'inactive'.

To create a new item:

- Select the Data Domain category, then place the mouse cursor into the first row and type the new item;
- Put a tick into the 'Is Active' checkbox related to your item and press 'Enter';



- Click 'Save' and confirm Domain Changes.



2. Security Management

Visual Outcomes contains an internal security model that allows you to restrict various facets of the application to different users and groups of users. Visual Outcomes contains five Security Roles:

1. CEO

The highest security role
Considered an administrator

2. Practice Manager

Considered an administrator

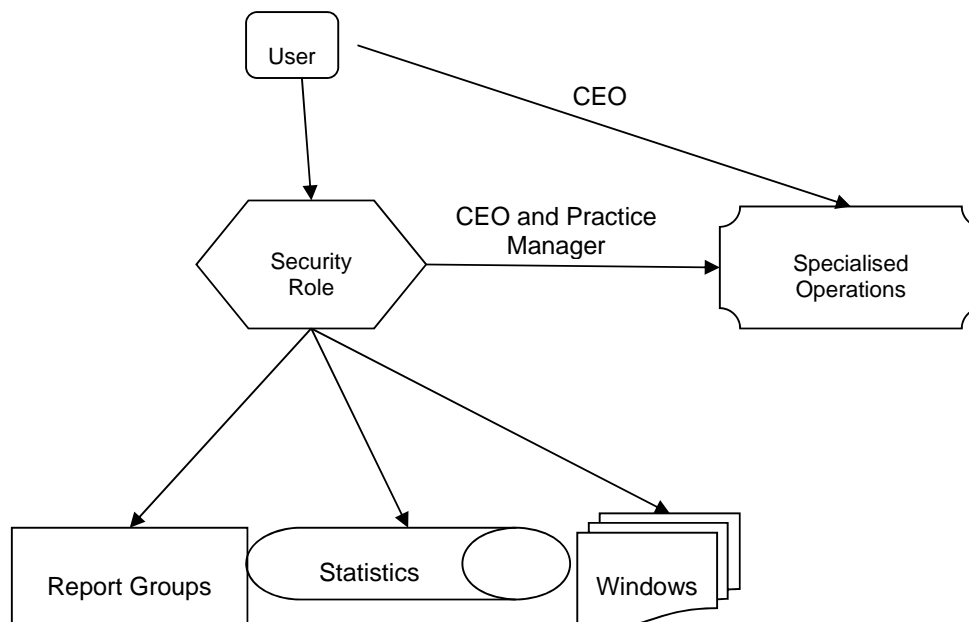
3. Practitioner

4. Senior CA (Care Assistant)

5. CA (Care Assistant)

6. Care Manager

- This security level is a specially indicated practitioner to oversee clinic care management. This is administration security level with practitioner rights to be able to work with clinical records.
- It is suitable for Clinical Security Officers and Clinical Care Managers.
- Each user of Visual Outcomes is assigned one or more Security Roles. Security Roles are then given rights to various objects/actions.



Security roles are clinic-specific. So an individual can have different security levels in different clinics.

The Security model applies to the following:

Windows:

Allow or Deny access to any of the windows/forms that appear in the *Navigator*;

Statistics:

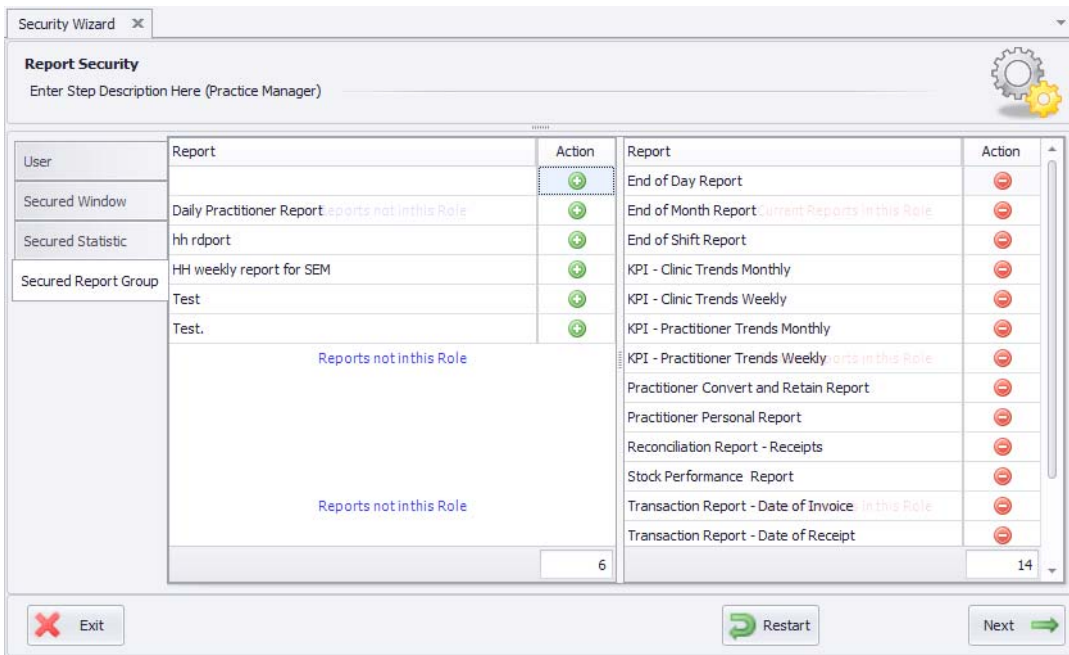
Allow or Deny access to a statistic in the *Management Statistics* window;

Report Groups:

Allow or Deny access to a Report Group in the Managements Reports window;

If a user is given access to a Report Group, then the system automatically allows that user to run the statistics within the Report Group without individual Statistics security being set.

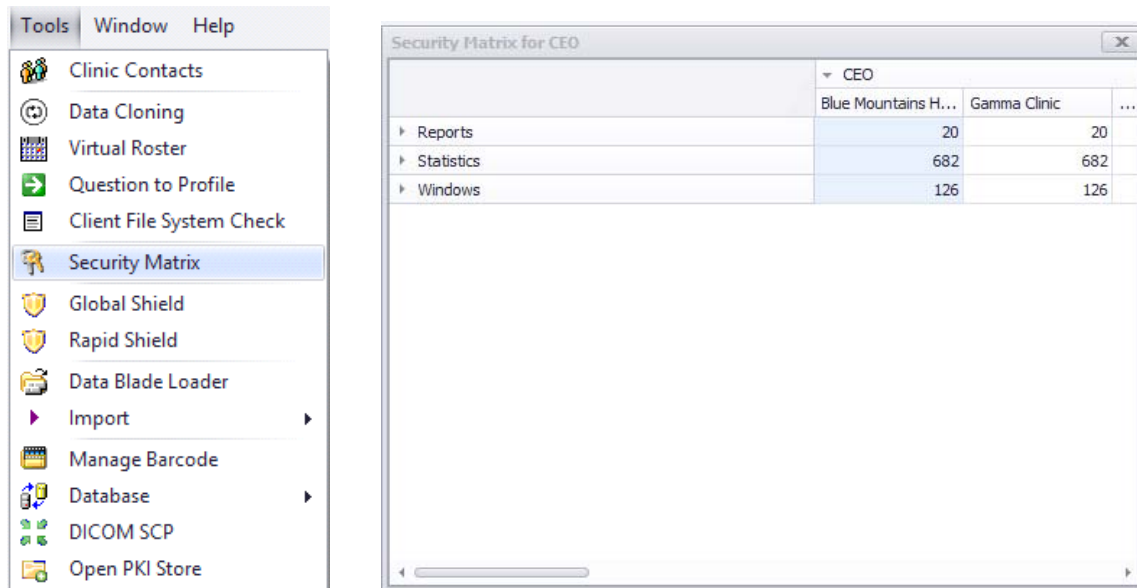
Go to *Navigate – System – Security Wizard*:



Various functions are limited only to the CEO and/or Administrators (Specialised Operations):

- **CEO Only:**
 - Receipt Modification post-banking;
 - Existing Client Plan Service Changes;
- **Administrators Only:**
 - Stock Browser inline changes;
 - Permanent Client Discount.
 -

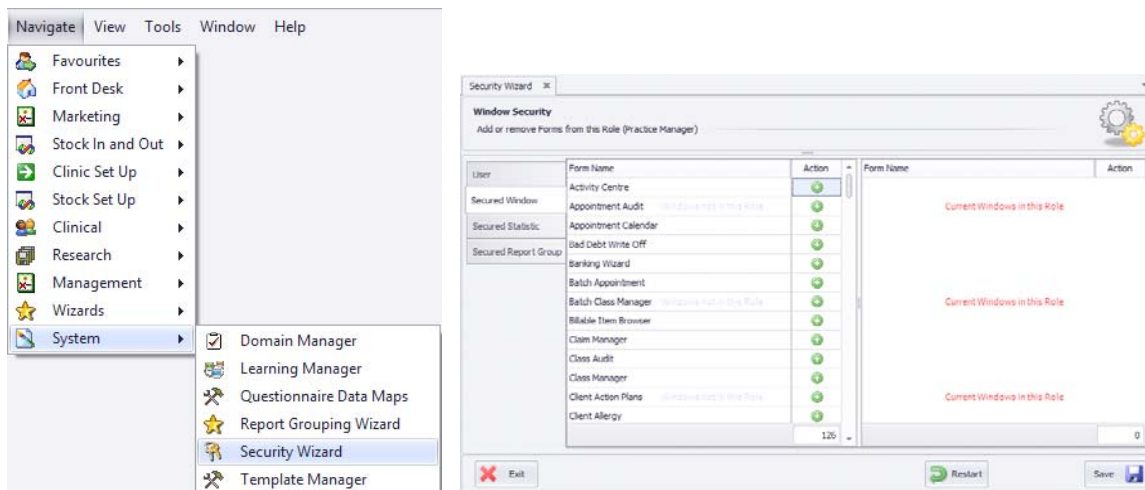
Each staff member can review available Reports, Statistics and Windows according to their security role under Tool/Security Matrix:



2.1 Security Access or Role Changes

Rights to change Security Access or Roles are, of course, **restricted to the CEO**:

- Go to *Navigate – System* - ‘Security Wizard’;
- Select the security level to be amended, then click ‘Next’;
- Adjust the Personnel in the Role, in each case choosing the Clinic or Clinics this applies to;
- Adjust the allocated rights in windows, statistics and reports tabs;
- Click on the green ‘+’ button to action the window/statistic/report from not being in the role (in the left column) to being in the role (the right column).
- Click ‘Save’.

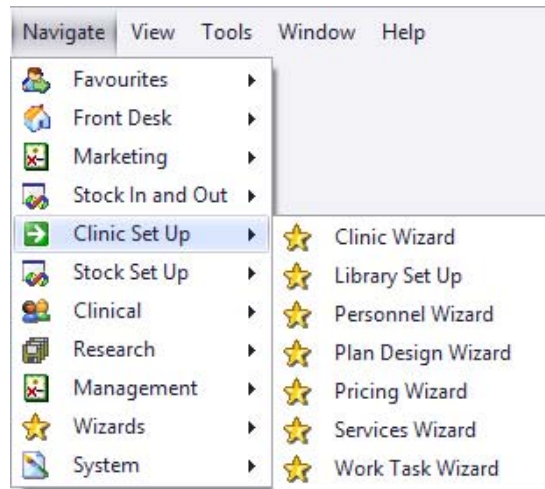


<http://visualoutcomes.com/index.php/home-secure/documentation/training/training-videos-part-6/>

3. Clinic Management

3.1 Clinic Set Up

Clinic Set Up has its own tab in the *Navigate* menu.



Use it to access Wizards for set-up routines and making changes. Changes here will generally require top level security rights (CEO or Practice Manager).

Setting up or making changes to a clinic is managed through the *Clinic Wizard* and also requires use of the *Roster* – in the *Clinic* view.

3.2 Clinic Wizard

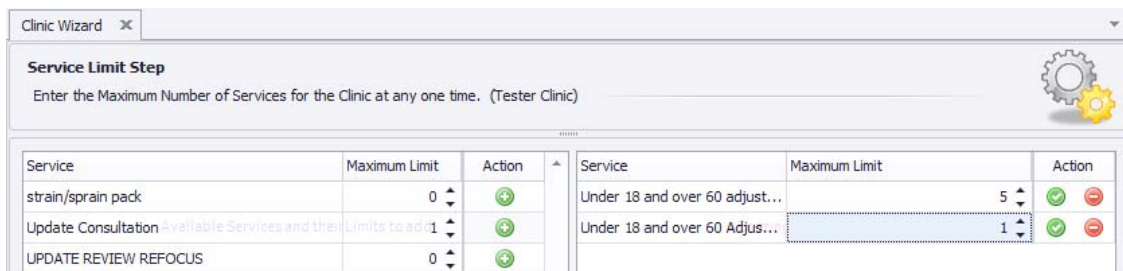
This Wizard is used for setting up your clinic on installation of VO or making changes to the set up.

3.3 Creating a New Clinic

To create a new clinic;

- tick 'Create a new Clinic' at the start menu of the Clinic Wizard and hit 'Next'
- Enter the Clinic Name
- Duration of Time Slot (minute increments on the Appointment calendar in multiples of 5), and select the colour associated with the Clinic
- Tick on 'Is Active' and click on Next

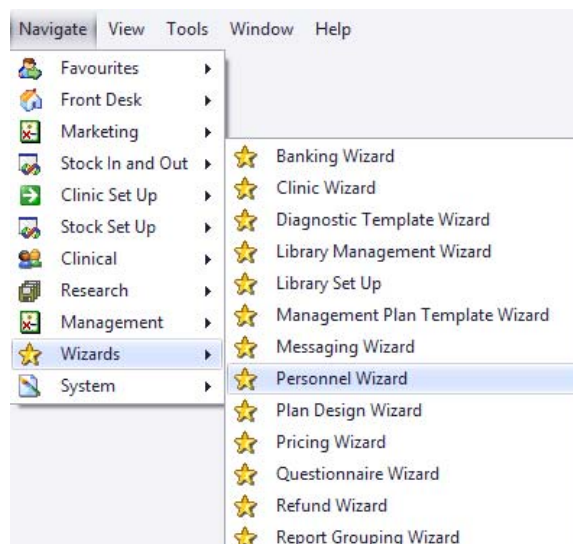
- Enter the Contact Details and click Next
- Enter the Clinic Address and click Next
- Enter the Postal Address and if it's the same as the Clinic Address, tick on 'Same as Clinic Address'
- Enter the Clinic Delivery Address and click Next
- Enter the Clinic Regulatory Data and Banking details and click Next
- Select the available services on the left-hand column and input the Maximum Limit of services for the clinic at any one time. Add the services into Existing Services by clicking on the green '+' button. Click Next.



- Enter the Till Name by clicking on the first line under the 'Till Name' header. Enter the Open Command and select 'Is Active' and click Next
- Select the default images that you'd like to add when the client starts an appointment by click on the green '+' button. Enter the Number of Surfaces for each image or tick on 'Use Annotated Surface'. Click Next.
- Enter the Clinic Resources and tick on 'Is Active' and action to add to existing clinic resources. Enter Next to complete the Wizard
- Click the 'Finish' button to close the Wizard.

3.4 Adding a New Practitioner to the Clinic

To add a new Practitioner into the system there are five functions. Go through them in this order:



- **Personnel Wizard** – sets up the identity of this Practitioner;
- **Pricing Wizard** – sets up service prices to be charged for this Practitioner;

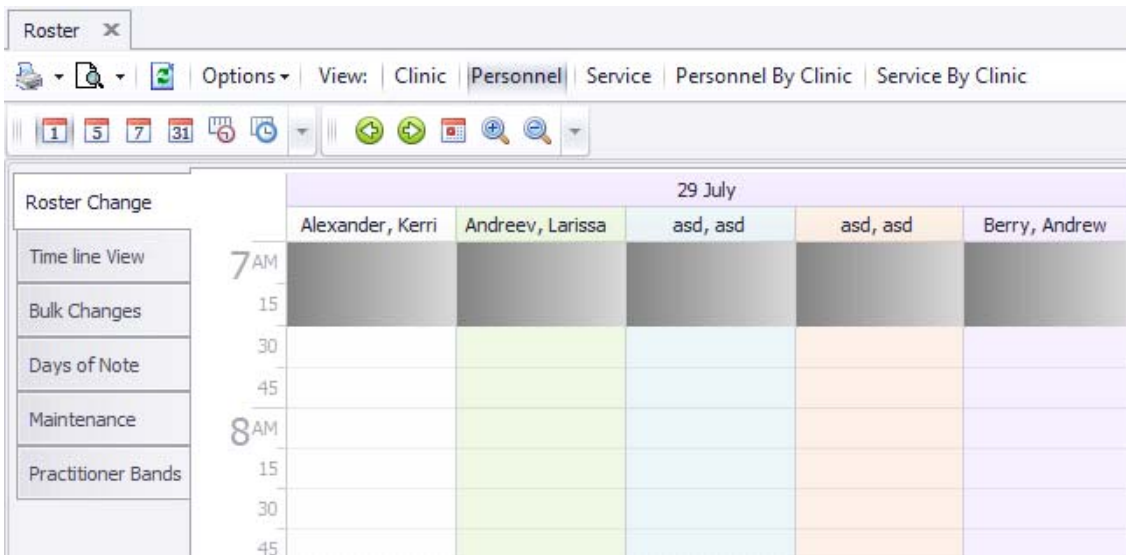
At this point you need to refresh the Data Cache (CTRL + D) and close all open windows (CTRL+ALT+W) – then select ‘My Settings’ from the File menu. Alternatively you can simply exit Visual Outcomes and log in afresh.

The Security Wizard – sets up the security role and assigns the practitioner to the clinic.

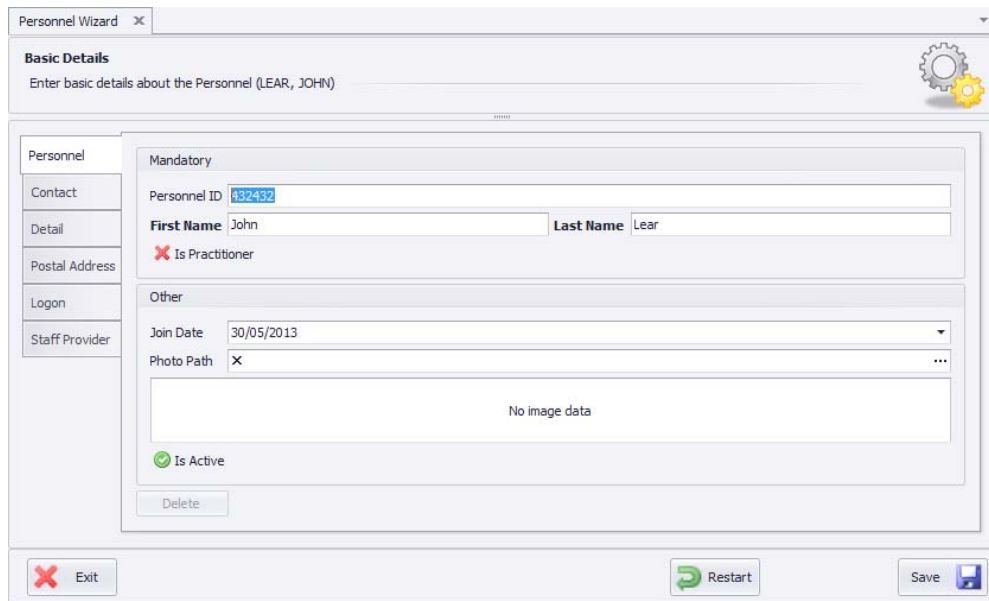
Remember, select at least one clinic name before adding practitioners and activating security, otherwise the practitioner will not be able to log in to Visual Outcomes.

The Roster ‘Personnel’ view - sets up the days and hours that this Practitioner will be in the clinic; and

The Roster ‘Service’ view – sets up the type of services to be allowed as appointments at particular times



This Wizard is used to establish Practitioners and CAs in the Clinic or to make changes.



Personnel Tab:

Personnel ID is allocated automatically by the system. On installation a person will be nominated as the CEO (chief executive officer) for the system. This person holds maximum security rights and is the delegator of rights to all other personnel. Other personnel will be allocated an ID that relates to their name;

- *First Name* and *Last Name* are compulsory fields;
- Mark the box to distinguish a person as a 'Practitioner';

Note: Once a staff member has been made a 'Practitioner' they cannot become a regular staff member and vice versa. If you need to change the status of a personnel you need to enter them again and assign a different Personnel ID.

A person should be marked as '*Is Active*' unless he or she has ceased to be involved in the Clinic. A person entered by mistake can be deleted but not once they have had activity in the system. Once they have activity in the system they can be marked as '*Inactive*'. This removes them from most interfaces but retains the history of their involvement.

Practitioner Tab - will only be relevant if the person has been marked as a 'Practitioner' (see above):

Appearance Order establishes the layout of the *Appointment Calendar* when multiple Practitioners are in view;

Time slot limited by maximum number set for any ONE permitted service – an important decision to be made in structuring the *Appointment Calendar*. If you select this option it means that the number of bookings permitted (by *set up* in the *Roster*) in the time slot is limited to the maximum allowed for *any one* of the permitted services. So once any maximum is reached, no other services can be booked in. For example, if four standard appointments and one special appointment are permitted in a slot, a booking for one special appointment will deny any standard appointments being booked in.

This is the better choice where you wish to keep a tight control on the *Appointment Calendar* and to rely on creation of *Exceptions* through the *Roster* where variation is to occur. By not selecting this option, any of the permitted services can be booked in up to their respective maximum number, whether or not any other service type has already been booked in;

Separate Banking and *Own Account* relate to Practitioners who have separate banking. Selecting *Separate Banking* creates an independent banking report but the moneys are still

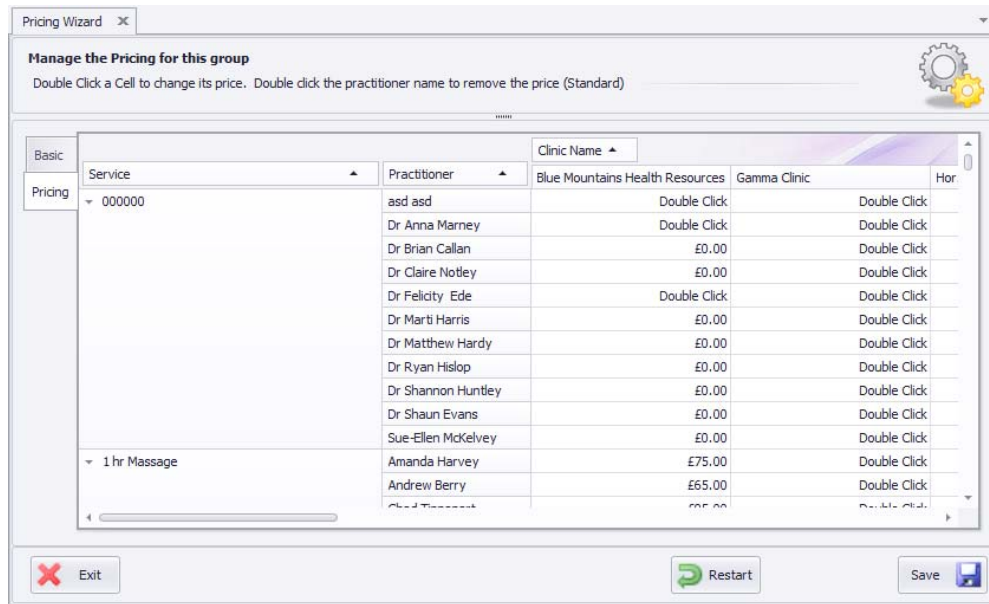
banked to the Clinic account. By also selecting *Own Account*, the system will not expect receipts relating to that Practitioner to appear in the banking process. This means the Practitioner will be responsible for his or her own takings;

Clinic selection and *Provider Number* are completed on the 'action panes'. Insert the provider number relevant for the Clinic and 'action' the Clinic;

Practitioner Type is important. This dictates the types of services that the *Appointment Calendar* will permit for this Practitioner. Be careful about allocation of practitioner types (set up in the *Domain Manager* – under the *System Tab* in the *Navigator*). *Practitioner Types* should correspond with credentials and the clinic's services.

- *Contact Tab* - complete as required;
- *Detail Tab* - complete as required;
- *Postal Address* - complete as required;
- *Service Price Tab* - this is a reference window (read only) displaying service prices that have been set for the practitioner. Prices are set and changed in the Pricing Wizard. Changes in the Pricing Wizard reflect automatically in this tab;
- *Logon Tab* - each personnel has a logon PIN which is their personal PIN for logging on to Visual Outcomes. The PIN can be changed by the Practitioner for himself or herself. Only the CEO can change another person's PIN.
- *M A Signing* – This is for Medicare transactions. Practitioners can be configured so Medicare Signing is Optional, Mandatory or Not Required. Prescriber number can be entered for practitioners registered with eRx to e-prescribe.
HPI-I is the Federal government's *Healthcare Provider Identifier - Individual*, which is reserved for future use in Visual Outcomes.
- *Staff Provider* – If the personnel is a staff provider, then the clinic postal address should be entered into this tab.

3.5 The Pricing Wizard

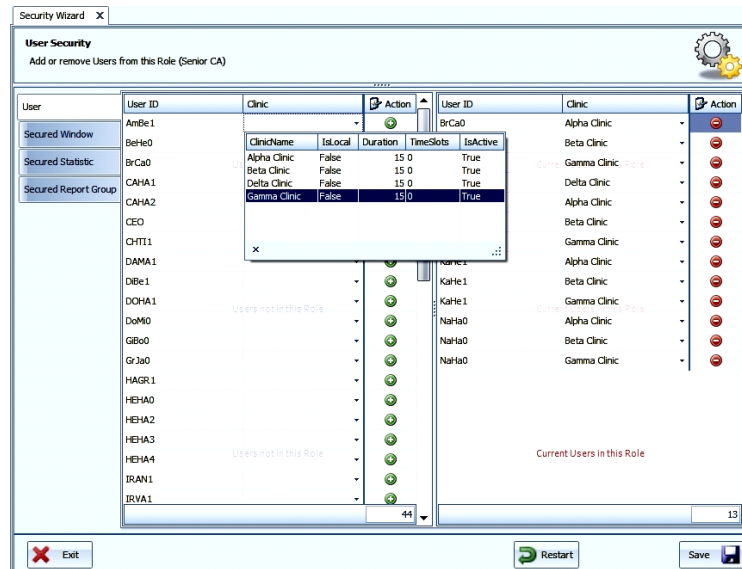


Go to the *Pricing Wizard* through the *Wizards* tab in the *Navigate* menu. You will need to go separately to each existing *Pricing Group* to be serviced by this Practitioner:

- Select the 'Pricing' tab;
- Filter for any one or all Clinics at which the Practitioner will provide services;
- Identify each service separately from the Service column then double click on each relevant one in the Clinic column to bring up 'add price' window.
- Type in price and 'action';
- Apply same price for same service to all practitioners in all clinics or set up different prices.

3.6 The Security Wizard

The Security Wizard sets up the security role and assigns the staff member to the clinic.



- Go to Navigate – System – Security Wizard
- Select ‘Use an Existing Security Manager’ – select the security level you wish to apply (Practitioner) and click ‘Next’
- Select a Clinic for the practitioner on the left then “Action” to the right and click ‘Save\

You can assign multiple practitioners to the same security role while you’re in the window before clicking ‘Save’

If you need to assign the same practitioner to different clinics/different roles you need to

- click ‘Save’ and ‘Restart’ to continue assigning security.

At this point you need to exit Visual Outcomes and log in again to update all elements of the system. You can exit and logon just once when you have multiple changes to the database.



<http://visualoutcomes.com/index.php/home-secure/documentation/training/training-videos-part-6/>

3.7 Deleting a Practitioner from the Clinic

To delete a Practitioner from the daily activity of Visual Outcomes:

- Go to the Personnel Wizard and select the Practitioner concerned;
- On the ‘Personnel tab’, de-select ‘Active’;
- ‘Save’ and ‘Exit’.

Note: please make sure to transfer any appointments already in the appointment calendar for the practitioner you are deleting PRIOR to de-activation, otherwise they will no longer be visible on the appointment calendar for rescheduling.

If at a later stage you need to review any information about an inactive practitioner you can do it by switching the filter in the “Data Filter” window (from the *Data* menu) under “General Data Elements” to “In Active Only”;

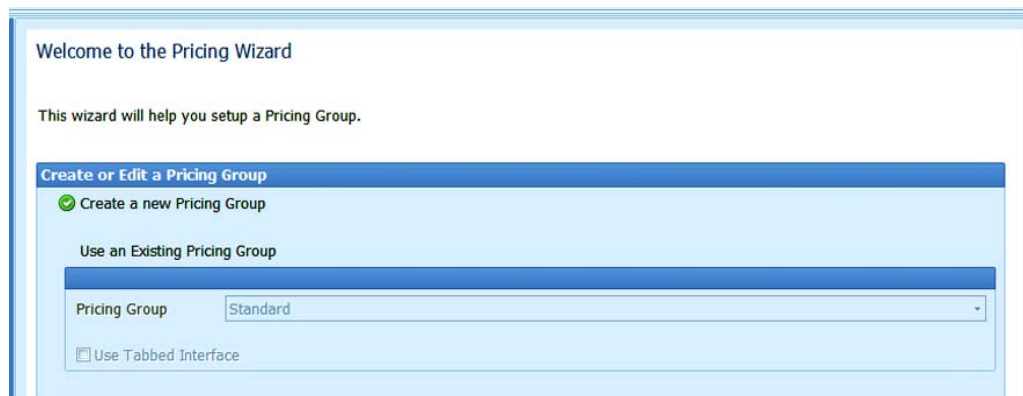
Remember to switch this filter back to “Active Only” after you are finished.

3.8 Creating a New Pricing Group

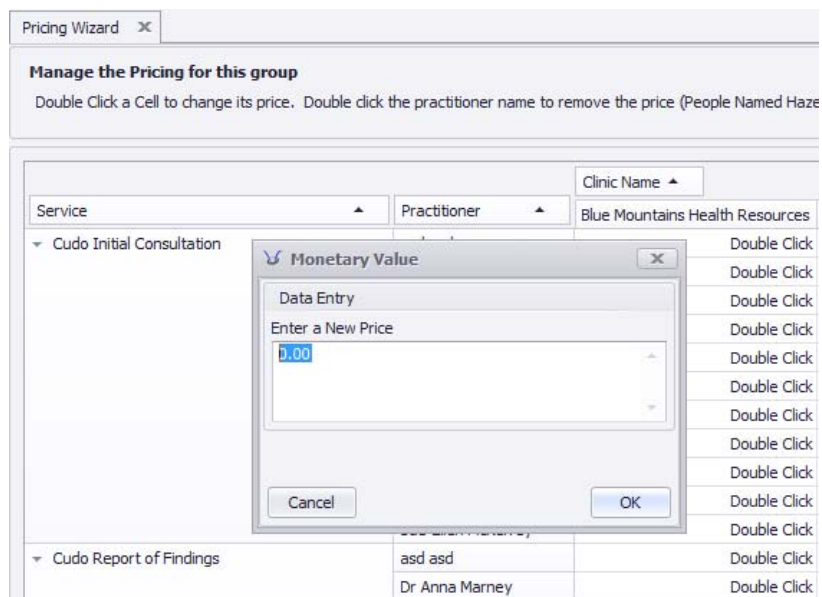
Pricing Groups are central to management of service fees for different client groups. Clinics can have as many or as few (one only) *Pricing Groups* as required. This facility is ideal for special pricing structures to apply to groups such as VIPs, families, clubs, corporate, insurance cases and more. Think about *Pricing Group* as a concession/special price group. This structure allows you to use the same service name with different prices for different clients.

3.9 The Pricing Wizard

To create a new Pricing Group:



- Select the Pricing Wizard through the Clinic Set Up tab in the Navigator;
- Go to 'Create a New Pricing Group';
- Carefully select the Price Type (name) and the description;
- Set the % discount to apply to all stock supplied to this Client Group as a decimal;
- Separately identify each Service from the 'Service' column;
- Double click on each relevant Clinic column to bring up 'Add Price' window;
- Type in the price and 'OK'.



3.10 Adding a New Staff Member to the Clinic

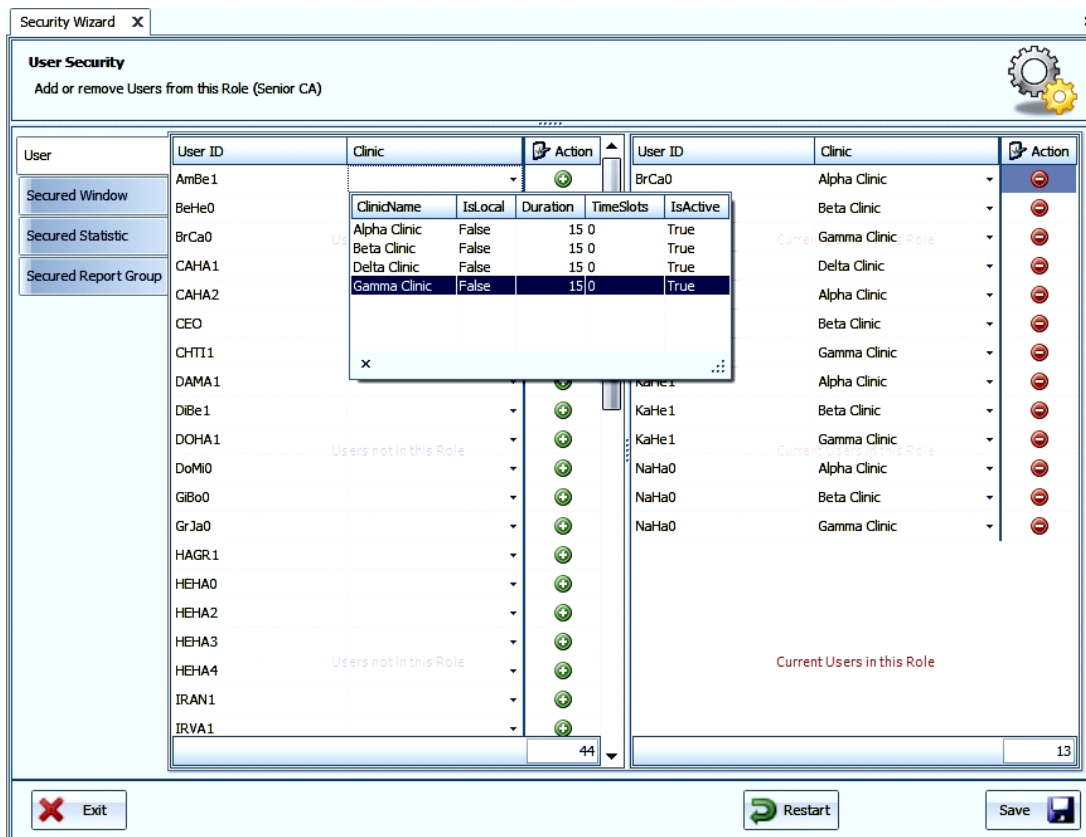
To add a new member of staff to the system there are two functions.

Go through them in this order:

The Personnel Wizard – sets up the identity of this staff member; DO NOT select the ‘Is Practitioner’ button for other staff members.

The Security Wizard – sets up the security role and assigns staff member to the clinic. Remember, select at least one clinic name before adding staff members and activating security, otherwise the staff member will not be able to log in to Visual Outcomes. You can assign different security levels for a user in different clinics.

Please refer to Adding a New Practitioner to the Clinic for more “how to” information on these wizards.



At this point you need to exit Visual Outcomes and log in again to update all elements of the system..

3.11 Deleting a Member of Staff from the Clinic

To delete Personnel from the daily activity of Visual Outcomes:

- Select the ‘Personnel Wizard’ through the *Clinic Set Up* tab in the *Navigator*;
- Select the staff member concerned;
- In the *Personnel* tab, de-select ‘Active’;
- ‘Save’ and ‘Exit’.

These steps have removed the staff member from Visual Outcomes. You must exit Visual Outcomes and log in again to update all elements of the system.

You can exit and logon just once when you've made multiple changes to the database.

3.12 Creating a New Service

Setting up services requires careful planning to ensure that the service types reflect the clinical objectives and protocols of the practice.

There are two basic steps in setting up a new service:

The Services Wizard guides you through establishing the service and instructs Visual Outcomes on its attributes; and

The Pricing Wizard guides you through setting prices for the service relating to each clinic and to each practitioner who can perform the service.

3.13 The Services Wizard

Access the *Services Wizard* through the *Navigator* using *Clinic Setup* tab or the *Wizards* tab.

Service Details Step
Enter the details of the Service and press NEXT (1 hr Massage)

Service	
Service Code	1 hr Massage
Health Code	...
Description	1 hr massage
Service Type	Service
Has Service Roster	<input checked="" type="checkbox"/>

Grouping	
Service Group	Massage

Notification	
Before	After
Finish Message	1 hours

Display	
Colour	DodgerBlue
Duration	60 minutes
Is Active	<input checked="" type="checkbox"/>

Financial	
Tax Name	None
Missed Appointment Fee	\$0.00

Delete Service Delete

Exit Restart Save

The Service tab:

Service Name – name each service carefully to help those using it and avoid confusion with any other service;

The Health Code is taken from the Private Health Fund schedule and appears on the client's invoice. Be careful to get it right as the clients will need this reference for claiming purposes;

The Description is optional;

The Service Type is important to the system. A 'composite' is a service that comprises sub-services. This enables you to book appointments as a single service but have the separate service elements appear on the client's invoice. A common example may be an X-Ray series;

Has Service Roster – tick 'on' if the service has a roster; The roster defines when appointments can be made for this particular service through the 'Roster – Personnel Services' view.

Service Group - Service Groups should only be established after considering your practice circumstances. *Service Groups* are created through the *Domain Manager*. One purpose is to allow statistical comparisons of particular service groupings as a management tool. Another purpose is to assist in faster establishment of services in the *Personnel Service* aspect of the *Roster* – grouping of services allows 'batch' entry where relevant;

Notification – before and after – allows a report to prompt you to contact a client at selected times before and after the appointment;

Finish Message is a facility for the practitioner to generate a particular standard message to the Front Desk once this service has been completed for a client. It is a facility to be used essentially with the *Clinical* module of *Visual Outcomes*;

Colour Selection – click beside the colour box and select the colour of the service as it will appear in the *Roster* and *Appointment Calendar*;

Duration – sets the appointment duration;

Mark the service as 'Active';

Tax Name –allocates any tax that may apply to the service. This allows *Visual Outcomes* to automatically determine if a service is carrying a tax component and to generate relevant tax reports;

Missed Appointment Fee – Service pricing is entered through the *Pricing Wizard* (a more efficient process given the flexibility of the pricing matrix by Service, by Practitioner and by Pricing Group) with the exception of the *Missed Appointment Fee*. The fee set here will apply for any missed PAYG appointments and not for appointments that are for a service set by a *Pre-paid Plan*. For *Pre-paid Plans*, the *Missed Appointment Fee* is determined by the *Plan* pricing.

Service Practitioner Type tab – sets the practitioners who will be able to perform this service. Remember that only selected practitioners will have this service set on the Appointment Calendar.

Service Price tab – the history of pricing for this service is displayed. This is a read only display – service prices are set through the *Pricing Wizard*;

Clinic Service Limit tab – sets the maximum number of times a Clinic can deliver a service simultaneously. If there is no entry, there is no maximum limit applied. Used when the number of simultaneous services is limited by clinic-wide constraints – e.g. X-ray services are limited to one where there is only one X-ray machine. The opportunity to limit the number of Services an individual Practitioner can deliver in any one time slot is separately determined through the *New Recurrence* window in the *Personnel Services Roster*;

Service Work Surface tab – displays available work surfaces for a service. Select and ‘Action’;

Service Monitor tab – select the progressive number of services (of this service) for which you require notification through the *Service Milestone List* in the *Follow Ups* tab used by the Front Desk or by Practitioners. Set the hours that determine the period before and after the appointment (forming the Milestone) that the client will appear on the *Service Milestone List*.

VOID tab – set if this service is to be available for appointment creation over the internet under *Visual Outcomes* web enabled service – www.demo.voisite.com. This window facilitates the rules to apply. Refer ‘Visual Outcomes Internet Delivery’ – known as VOID.

Service Resource tab – permanently assigns a resource to service, e.g. X-ray room for x-ray examinations.

3.14 The Pricing Wizard

Access the *Pricing Wizard* through the *Clinic Setup* tab in the *Navigate* menu or click on the ‘Pricing Wizard’ button at the end of the *Services Wizard*:

- Select the ‘Pricing Wizard’ through the *Clinic Set Up* tab in the *Navigator*;
- Select the *Pricing Group* required;
- Go to the ‘Pricing’ tab;
- Double click on each relevant existing *Service Price* to bring up ‘Add Price’ window;
- Type in price and ‘action’.

3.15 Deleting a Service

The *Service Wizard* allows *deletion* of a service (*Service* tab in the *Service Wizard*). This **can only apply** to a service that has never been used to make an appointment in the *Appointment Calendar*. Once a service has been used for an appointment or an invoice you cannot delete it, you can only ‘de-activate’ it.

In the same *Service* tab in the *Service Wizard*, you can mark the service as not being active. The effect is to remove the service from available options. The service can be re-activated by marking as ‘Active’ in the *Service Wizard*.

To ensure effective de-activation throughout Visual Outcomes it is preferable to shut down and re-open Visual Outcomes. The same applies to re-activation.

3.16 Changing Service Prices

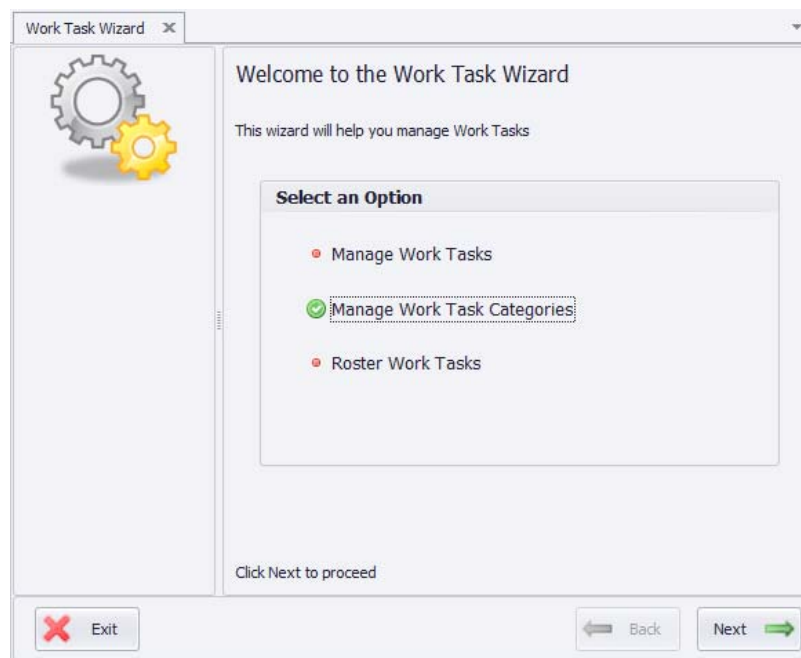
All service pricing is set up through the *Pricing Wizard*. The history of prices for any service can be viewed through the *Service Wizard*. The history of service prices attributed to a particular Practitioner can be viewed through the *Personnel Wizard*:

- Go to Navigate – Clinic Set Up - Pricing Wizard;
- Select the Pricing Group required;
- Go to the 'Pricing' tab;
- Double click on each relevant existing Service Price to bring up 'Add Price' window;
- Type in the price and 'action'.

3.17 Setting up Work Tasks

To set up a *New Work Task*:

- Go to Navigate – Clinic Set Up - Work Task Wizard;
- Select 'Manage Work Task Categories';
- Click 'Next';



- Create Work Task Categories;
- Select colour;
- Select visibility on Appointment Calendar by applying the green tick;

CategoryID	Work Task Category	Colour	Calendar Default
*	Click here to add new Task		
3	Daily	Fuchsia	✓
4	Weekly	Lime	✓
5	Twice Weekly	Cyan	✓
6	Monthly	Orange	✓
7	High Priority	Red	✓
8	Personnel Specific Task - to only b...	Yellow	✓
9	Irina	DodgerBlue	✗
10	Kat	DarkOrchid	✗

- Click 'Next' and select 'Click to Start the Wizard again' and 'Finish';
- Select 'Manage Work Tasks';
- Create new work tasks by typing in Work Tasks field, set task active;

Work Task ID	Work Task	Is Active
*	Click here to add new Task	
1	CA and Dr to review the day's appointments	✓
2	Review Client Follow ups and then NFA calls	✓
3	CA Tags (review yesterday's appointments)	✓
4	Reveiw today's Customer Service Notes	✓
5	Tomorrow Daily Client Service Tags	✓
6	The day's Banking and Til Point	✓
7	Tidying through practice	✓
8	Update Sandwich Board Chalkboard	✗

- Click 'Next' and 'Restart Wizard';
- Select 'Roster Work Tasks' then click 'Next';
- Click on 'Bulk Roster' tab;
- Select Clinic, select Personnel, select Task Category and select tasks;
- Schedule tasks and click on Change Tasks; confirm changes, click on 'Next' and 'Finish' wizard.

Work Task Wizard

Roster the Work Tasks
Assign Work Tasks to Personnel and Clinics

Calendar Bulk Roster

Clinic: [Dropdown] Assign to Personnel: [Dropdown]

Task Category: [Dropdown]

Tasks: [Dropdown] Mark: [Dropdown]

Task Data: [X] Mark All

Start Date: 30 July End Date: 30 Aug

Exit Next

For more information, please search the topic on our online F1 Help.

4. Plan Creation

The Plan options in Visual Outcomes are:

Free Form Plan

A Free Form Plan allows you to make any number of appointments as a “plan/schedule of care” without any upfront payment. This means you can have the equivalent of an ‘account’ running where the fee for a service is set at the plan level but payment is made later during (or even after) the plan. “Receipt Multipayments” can be used later to allocate a payment so that receipts attach to the relevant unpaid invoices.

A tip from Visual Outcomes – be aware that a Free Form Plan can rapidly build a debt owing to the clinic. As a matter of business sense, such a plan might well be used only selectively where the risk of default on payment is otherwise managed or accepted.

Instalment Plan

An Instalment Plan allows you to set the service price for a series of appointments and then to specify dates for the amount owing to be paid by “instalments”. The plan allows you to flag payment due dates. An “open filing cabinet” icon appears on the client’s appointment in the *Appointment Calendar* when a due date is approaching. No more appointments can be booked under the plan if the instalment payment is not received by the due date. This is clear from the New Appointment screen which will not show the option of a ‘plan’ appointment if the funds are not in the plan to cover the appointment.

Prepayment Plan

A Prepayment Plan allows you to set the service price for a series of appointments which are to be fully paid for up front. The credit created is indicated in the ‘Account’ section of the *Client Director* as “plan monies”.

A Prepayment Plan will have a “use by date” where the plan becomes inactive e.g. 6 or 12 months. An “open filing cabinet” icon appears on the client’s appointment in the *Appointment Calendar* when the end of the plan is approaching. A Prepayment Plan will not allow any plan appointments to be booked when the plan is completed or unfunded.

Creating a Plan

All plans are created through the *Plan Design Wizard*, accessed through the *Clinic Setup* tab in the *Navigate* menu.

Select ‘Create New Plan Design’ in the *Plan Design Wizard*. Select ‘Next’;

Plan Design Wizard X

Plan Details
Enter the general details about the Plan and press NEXT (Test plan)

Details

*Plan Name	Test plan
*Description	This is a test
*Plan Type	Service

Type

Expires in X Days	360
Finance Type	Prepayment
Is Active	<input checked="" type="checkbox"/>

Exit Next

- Name the Plan and add a description that will assist in specifying the purpose or scope of the plan (the description does not have any further functional purpose);
- Select the type of Plan through the drop down list – Service;
- Select the number of days in the life of the Plan – if not all services have been used by this due date the plan will deny further appointments and show that the Plan is ‘out of date’. This facility means that a client cannot hold a plan indefinitely. Unused moneys on the plan can be refunded using the Refund Wizard. A refund allows for returning funds to the client or, by first applying the plan refund to PAYG credit, for application of the unused money to a new Plan;
- Finance Type – Select the finance type: Prepayment, Instalment or Free Form;
- Tick on ‘Is Active’ if you wish for this plan to be active;
- Select ‘Next’;
- Select the clinics which will be offering this plan;

Plan Design Wizard X

Plan Clinic Step
Add the Clinics that can sell this Plan (Test plan)

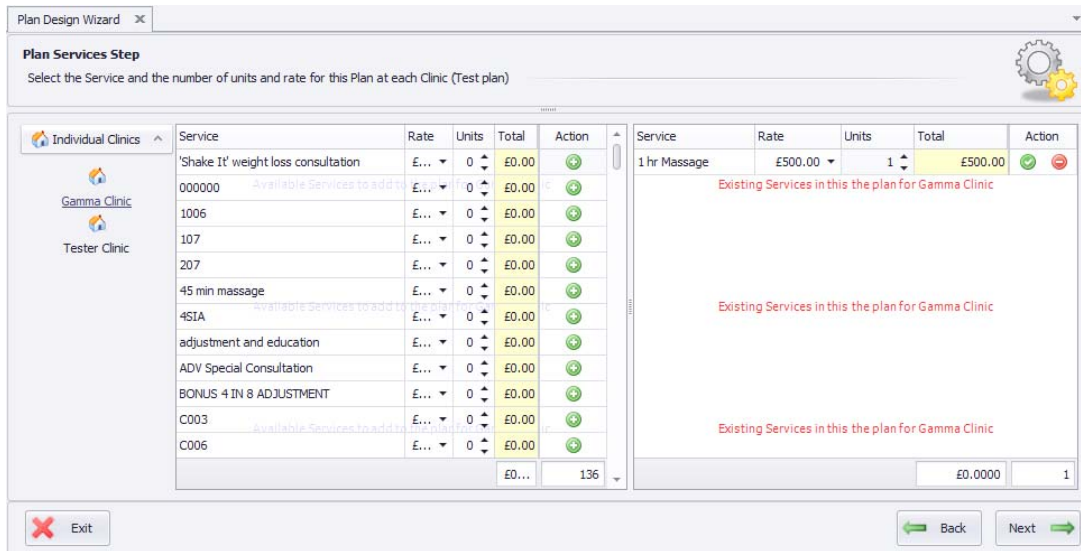
Clinic	Action	Clinic	Action
Blue Mountains Health Resources	<input type="checkbox"/>	Tester Clinic	<input checked="" type="checkbox"/> <input type="checkbox"/>
Hornsby	<input type="checkbox"/>	Gamma Clinic	<input checked="" type="checkbox"/> <input type="checkbox"/>
Mittagong	<input type="checkbox"/>		
Springwood	<input type="checkbox"/>		
The Hills	<input type="checkbox"/>		
Young Street	<input type="checkbox"/>		

Clinics with out this Plan: 6 Clinics with this Plan: 2

Exit Back Next

- Select ‘Next’;

- Click on each clinic icon on the left hand column. This will bring up a list of services for that clinic. Enter the rate and units for each service and click on *action* to include them nominating the number of each and the price of each;



- Select 'Next' and 'Finish'.

Editing a Plan

All plans are edited through the *Plan Design Wizard* accessed through the *Clinic Setup* tab in the *Navigator*:

Follow the Wizard and edit the relevant part. Remember to update any amended line item by selecting the update tick;

Select 'Next' and 'Finish'.

5. Plan Usage Analysis

Plan Usage Analysis is a management tool available through the *Management* tab in the *Navigator* for reviewing the practice-wide status of Pre-paid Plans. Individual Pre-paid Plans can also be reviewed by selecting them from the drop down menu.

Package Identifier			Details			Progress	
Paying Client	Package	Date	Last Appointment	Paid	Credit	Service Progress	Fin. Progress
Client...	Plan Y 09	13 Novem...	19 Mar 2010	£900.00	£90.00	90%	90%
Client...	Plan Y 09	04 March 2...	21 Apr 2010	£900.00	£90.00	90%	90%
Client...	Plan Y 09	29 June 2010	09 Sep 2010	£900.00	£45.00	95%	95%
Client...	Plan Z	20 Novem...	06 Feb 2007	£988.00	£304.00	69%	69%
Client...	Plan Z	10 Octobe...	19 Jan 2008	£1,520...	£38.00	98%	98%
Client...	Plan Z	19 Januar...	22 May 2008	£1,520...	£114.00	92%	92%
Client...	Plan Z	05 June 2008	03 Sep 2008	£1,520...	£228.00	85%	85%
Client...	Plan Z	21 August ...	16 Feb 2009	£1,520...	£76.00	95%	95%
Client...	Plan Z 09	28 July 2009	10 Dec 2009	£1,680...	£294.00	82%	82%
Client...	Plan Z 09	13 Februar...	09 Oct 2010	£1,680...	£588.00	65%	65%
Client...	Plan Z 09	04 May 2010	03 Feb 2011	£1,680...	£84.00	95%	95%
Client...	Plan Z 09	09 June 2010	16 Nov 2010	£1,680...	£84.00	95%	95%
Client...	Plan Z 09	29 Octobe...	06 Apr 2011	£1,680...	£84.00	95%	95%
WINS...	Plan Z 09	23 August ...	14 May 2011	£1,680...	£84.00	95%	95%
				Paid: ...	Credit: ...	Progress Avg: 93.21%	Progress Avg: 93...

After selecting 'All Clients', you can:

Review by Clinic; and

Review status with financial outcomes:

- *Active* – plans still active with services remaining and not out of date;
- *Completed* – plans completed through all services delivered or out of date;
- *Not paid* – plans created but not paid for;
- *Partly paid* – plans created and only partly paid;
- *Strange* – plans where Visual Outcomes detects that payment and services have lost expected synchronisation.

Instalment Plans that are sold to a client can also be tracked within the Outcomes at a Glance tab in the Client Director.

This displays the **Value/Cost** of the plan and what has been **paid** by the client. **Paid** is equal to the receipts attached to the invoices for payment of the plan.

Plans	Plan Z (Active)
Value	\$265.00
Paid	\$265.00

6. Voucher Creation

There are two variations of vouchers that can be created and used through Visual Outcomes.

- Vouchers for a specific service or stock items to an exact dollar value.
- Vouchers for a specific dollar amount - spent on any combination of services and stock.

Create Vouchers for use in your clinic by using the Voucher Wizard.

Voucher for a specific service/stock

Open the Voucher Wizard by going to Navigate – Management – Voucher Wizard.

Select Create a New Voucher and click Next

- **Campaign Name** – This should represent the stock or service you wish to create vouchers for
- **Personnel** – Auto populated as the logged in user
- **Clinic** – Auto populated as the logged in clinic
- **Expiry Date** – Set the expiry date. On days after this date, you will not be able to sell this voucher.
- **Voucher Value** - this should be the exact amount of the service or stock item.

Example: An Initial Consultation is \$100

- Add a **Description**, make sure **Is Active** is ticked then click **Next**

Voucher ID	Status
1001065	Unused
1001066	Unused
1001067	Unused
1001068	Unused
1001069	Unused
1001070	Unused
1001071	Unused
1001072	Unused
1001073	Unused
1001074	Unused
1001075	Unused
1001076	Unused
1001077	Unused
1001078	Unused
1001079	Unused
1001080	Unused
1001081	Unused
1001082	Unused
1001083	Unused
1001084	Unused

- **Enter Number of Vouchers** –decide on the number of Vouchers being issued e.g. 20 “Initial Consultation Vouchers”
- Enter **20** then click on the **Create Vouchers** button. A list of the **Voucher IDs** will be generated
- Click on **Next** to design the **Voucher Template**. Refer to the Template Manager section to create a specific look for your Voucher.

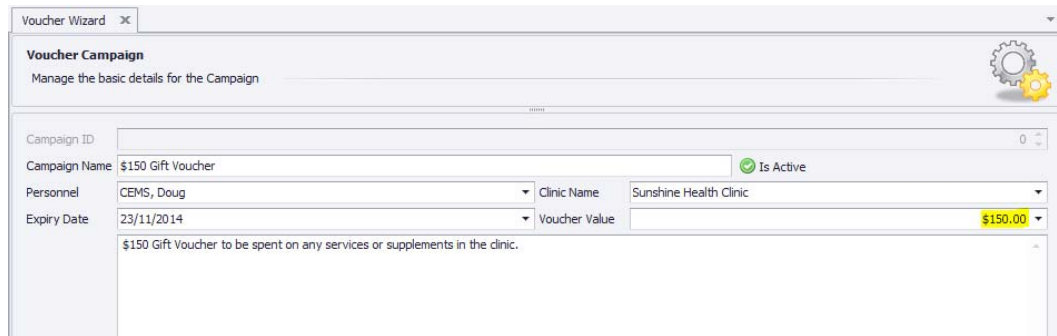
- Use the **Preview** mode to see how the Voucher will look when printed.

- Click on **Next** then **Finish** the wizard.
- Go to **Data – Refresh Entire Data Cache**.

You are now ready to Sell and Redeem the Vouchers for Services and Stock Items.

Voucher for a specific dollar value

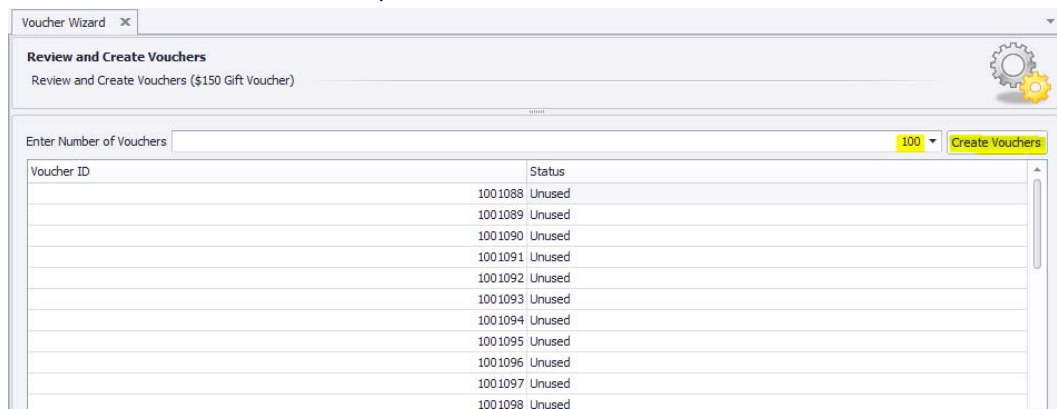
Open the Voucher Wizard by going to **Navigate – Management – Voucher Wizard**.
Select **Create a New Voucher** and click **Next**



Enter Campaign Name non-specific to Services or Stock.

Enter Personnel, Clinic Name, Expiry Date, and make sure **Is Active** is ticked.

Enter a Voucher value which is equal to an amount then click **Next**



Voucher ID	Status
1001088	Unused
1001089	Unused
1001090	Unused
1001091	Unused
1001092	Unused
1001093	Unused
1001094	Unused
1001095	Unused
1001096	Unused
1001097	Unused
1001098	Unused

- **Enter Number of Vouchers** – you need to decide on the number of Vouchers you will be issuing for this Campaign e.g. there are 100 Vouchers available to be sold, for \$150 each.
- Enter **100** then click on the **Create Vouchers** button. A list of the **Voucher IDs** will be generated:
- Click on **Next** to design the **Voucher Template**.
- Click on **Next** then **Finish** the wizard.
- Go to **Data – Refresh Entire Data Cache**.

Now you are ready to sell and redeem vouchers with a specific dollar value.

7. Composite Services

The Services Wizard

Access the *Services Wizard* through the *Navigate* menu using *Clinic Setup* tab or the *Wizards* tab.

Service Details Step
Enter the details of the Service and press NEXT

Details

Service Code

Health Code

Description

Service Type: Service (dropdown menu open showing: Service, Service Class, Service with Sub Services)

Has Service Roster

Grouping

Service Group

Notification

Before: After 0 hours 0 hours

Finish Message

Display

Colour: '0'

Duration: 15 minutes

Exit Next

Type new Service Name, select “Service with sub Services” option from the drop down menu in *Service Type* row:

- A ‘composite’ is a service that comprises sub-services. This enables you to book appointments as a single service but have the separate service elements appear on the client’s invoice. A common example may be an X-ray series;
- Proceed with the rest of the task in the same way as creating the service. In the *Sub Service* tab select the services that will be combined, enter a split percentage for each sub service. Don’t forget to set up the price.

Composite Services
A Composite Service can have many Services attached to its Invoice (1 Hr Massage)

Service	Service	Split Perc...	Action
Service Practitioner Type	1006	0.00%	+
Service Price	207	0.00%	+
Clinic Service Limit	45 min massage	0.00%	+
Service Work Surface	45IA	0.00%	+
Service Arrival Question	adjustment and education	0.00%	+
Service Monitor	ADV Special Consultation	0.00%	+
V O I D	BONUS 4 IN 8 ADJUSTMENT	0.00%	+
Sub Service	C003	0.00%	+
Service Resource	C006	0.00%	+
	C008	0.00%	+
	CHX033	0.00%	+
	Comparative Exam	0.00%	+
	Comparative Exam Analysis	0.00%	+

Service	Split Percent	Action
000000	0.00%	✓ -
107	Current Sub Services: 0.00%	✓ -
Current Sub Services		
Current Sub Services		

Exit Restart Next

8. Pricing Group Discounts

The Visual Outcomes system provides three types of discounts:

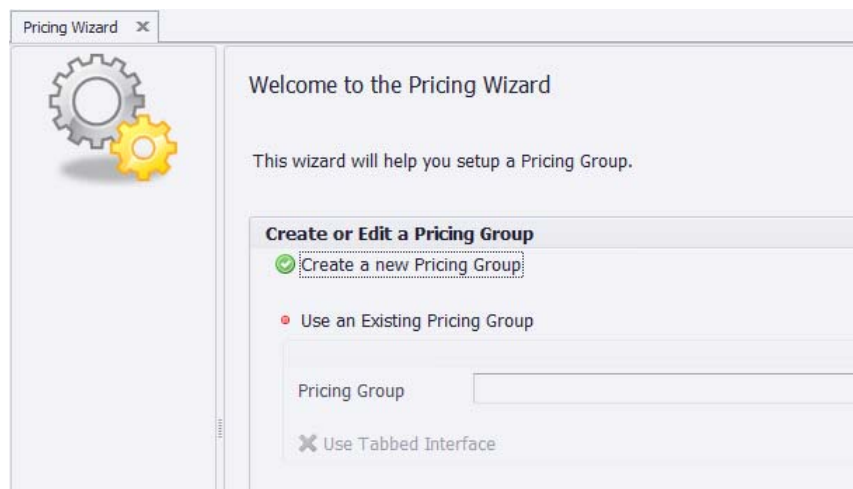
- Pricing Group discount;
- Individual client discount; and (see Part 2 – 4.10)
- One-off discount. (see part 2 – 4.11)

Pricing Groups

Pricing Groups are central to the management of service fees for different client groups. Clinics can have as many or as few (one only) *Pricing Groups* as required. This facility is ideal for special pricing structures to apply to groups such as VIPs, families, clubs, companies, insurance cases and more.

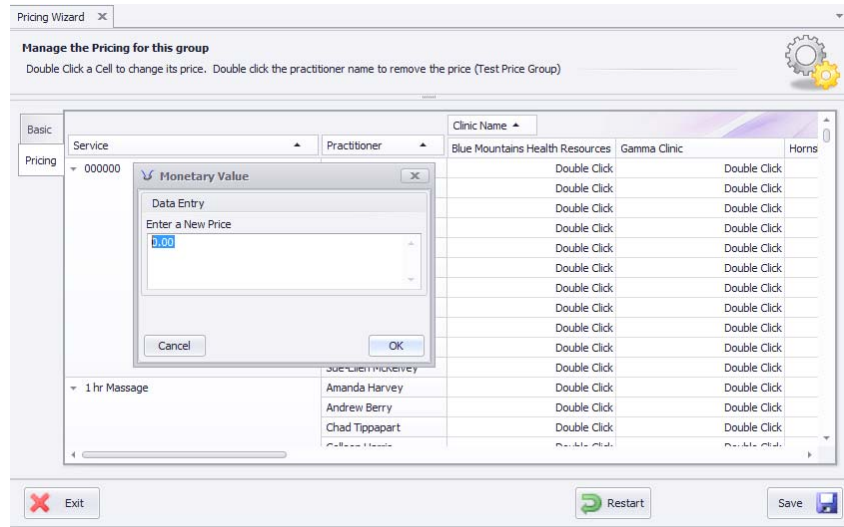
Creating a New Pricing Group

To create a new Pricing Group:

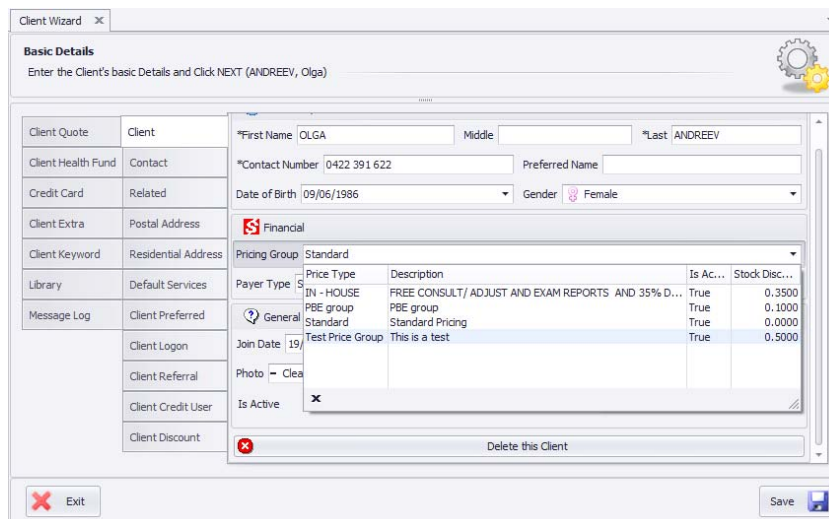


Select the Pricing Wizard through the Clinic Set Up tab in the Navigator;

- Go to 'Create a New Pricing Group';
- Carefully select the name and the description;
- Set the discount to apply to all stock supplied to this Client Group (as a decimal);
- Tick 'Is Active' if you wish to activate the Pricing Group;
- Separately identify each Service from the 'Service' column;
- Double click on each relevant Clinic column to bring up the 'Monetary Value' window;
- Type in the price and 'OK' and then 'Next' to complete the wizard.



- **The Pricing Group Discount** can be applied to a client by selecting the relevant *Pricing Group* in the *Client* tab of the *Client Wizard*:



9. Template Manager

Overview

Visual Outcomes has a *Template Manager* (document designer) that enables you to manage documents within your practice without any external software, providing you with a fully integrated report/document creation system.

Visual Outcomes provides inbuilt templates (documents) for invoicing, stock management, statistics (including grid, pivot and chart views), mail merge labels and reports as well as client photographic identification labels that can be customized to your styling. These inbuilt reports are referred to as ‘System Templates’, while the reports you create are referred to as ‘User Templates’.

By applying a versioning system and ‘system reset’ capabilities for each template, Visual Outcomes gives you the peace of mind to create or alter templates without worrying about disrupting normal

operations. When you are happy with the new layout and data for your template, a click of a button integrates the template into Visual Outcomes for immediate use.

Traditionally, 'mail merging' required using external programs to 'read' data from the practice management system. By integrating directly with the Visual Outcomes Database, creating "mail merge" documents is as simple as 'click and type'.

System Templates

System Templates include invoicing, stock management, mail merge, labels, email, SMS and clinical documents. They provide the default definitions of each document enabling you to begin using Visual Outcomes immediately.

DO NOT ALTER SYSTEM TEMPLATES

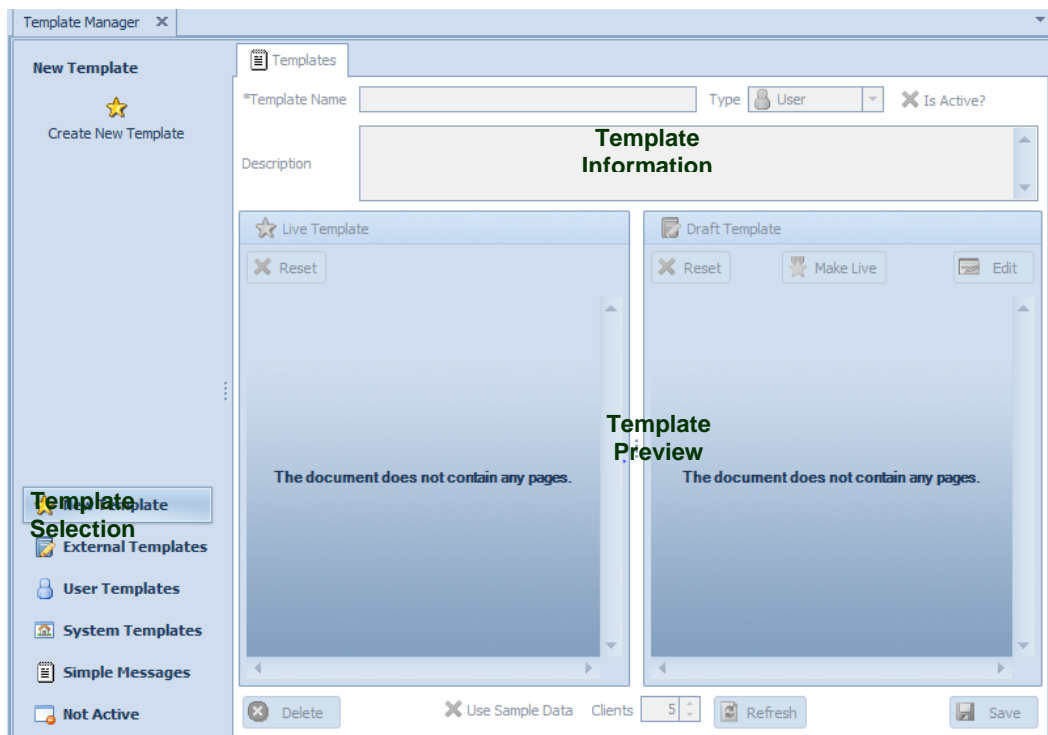
At your initial clinic set up, there is a set of system templates essential for your practice that is created e.g. invoice and header.

Please do not attempt to alter your System Templates.

Read, practice and refer to the Template Manager to avoid losing any of your 'default' set of System Templates.

Visual Outcomes reserves the right to charge for any errors made in altering a System Template

The *Template Manager* is the primary interface to manage your Templates.



The Template Manager has four areas:

Template Selection

This area contains a list of templates grouped by type. To activate a Template for editing, click the Template name and wait for Visual Outcomes to load the 'Live' and 'Draft' versions:

- *New templates* (More detail below);
- *External Templates* – Allows you to create an external Word or HTML template;
- *System Templates* - provides a list of all inbuilt templates for you to manage. Only administrators (CEO and Practice Manager Roles) can interact with these templates;
- *User Templates* - provides a list of all your active user templates for you to manage;
- *Simple Messages* – provides for the creation of short templates with Data Bindings
- *Not Active* - User Templates that have been deactivated.

Template Information

This area provides details for the active template including its name, type (user or system), its active state and description. System Template Information cannot be changed but you can change *User Template*. Changes allowed include the name, description and active state.

Template Preview

Each template has two versions - 'Live' and 'Draft'. The *Live* version is the actual template that will be viewed from within Visual Outcomes. The *Draft* version gives you the ability to prepare a new version without disrupting normal operation:

Live Edit – activates the *Template Designer* for the *Live* version of the Template;

Live Reset – restores the template to the system default;

Draft Edit – activates the *Template Designer* for the *Draft* version of the Template;

Draft Reset – makes the *Draft* version identical to the current *Live* version;

Make Live – turn the *Draft* version into the *Live* version. After this operation, both versions will be identical.

Template Action

Delete Template – only User Templates can be deleted;

Save Template – save the active Template Information;

Refresh – refresh the active Template Information and Preview;

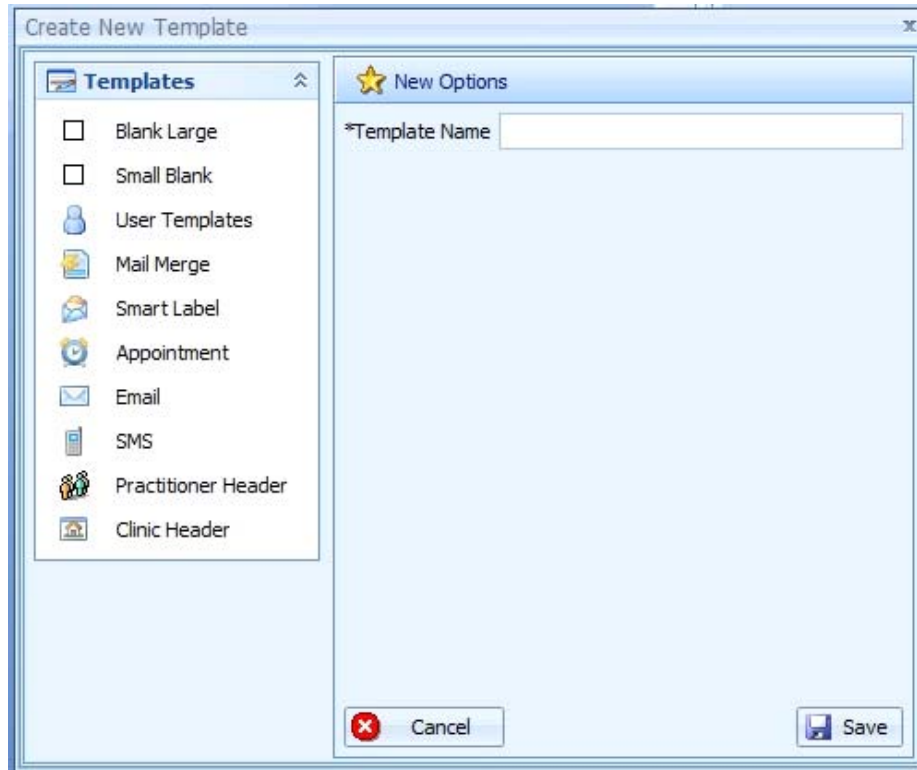
Show Sample Data – when checked, loads the activated Template with clients from the local client cache, allowing you to preview and design your template with real client data;

Sample Rows – the number of clients in the sample data.

Creating a New User Template

To create a New User Template:

Click the 'New Template' panel in the *Template Selection* area and click 'Create New Template'.
The following window will appear:



Select a Template type;

Enter a name for the Template and any available options and click 'Save'.

Blank Large

Provides a blank A4 sized template with the Page Header.

Small Blank

Provides a blank A5 sized template with a Page Header.

User Template

This option allows you to create a new template based from an existing User Template. When selected, the available templates are displayed under the *Template Options*:

Highlight the base *User Template* before clicking 'Save'.

Mail Merge

Based on the system 'Mail Merge' template, this template allows you to develop data-driven reports. The client data set containing postal address, contact, and login is automatically included enabling rapid creation of personalised documents.

Smart Label

This Template allows you to print client labels containing postal address, contact details and login information. This template provides built-in 'start position' printing, enabling you to print out on partially printed label sheets.

Appointment

This Template is designed to provide appointment specific data for clients. It is intended for use as the basis for email and SMS text messages for appointment reminders.

Email

Based on the 'Email Report' System Template, this can be used to generate general client messages for email such as birthday notices, clinic holidays, etc.

SMS

Based on the 'Email Report' System Template, this can be used to generate general client messages for SMS such as birthday notices, clinic holidays, etc.

Practitioner Header

Create a different header for every practitioner in the practice with details displayed on Receipts.

Clinic Header Small and Large

Create a different header for every clinic in a multisite practice with details displayed on Receipts.

After a New Template is created, it will automatically be activated in the *Template Manager*.

Recall

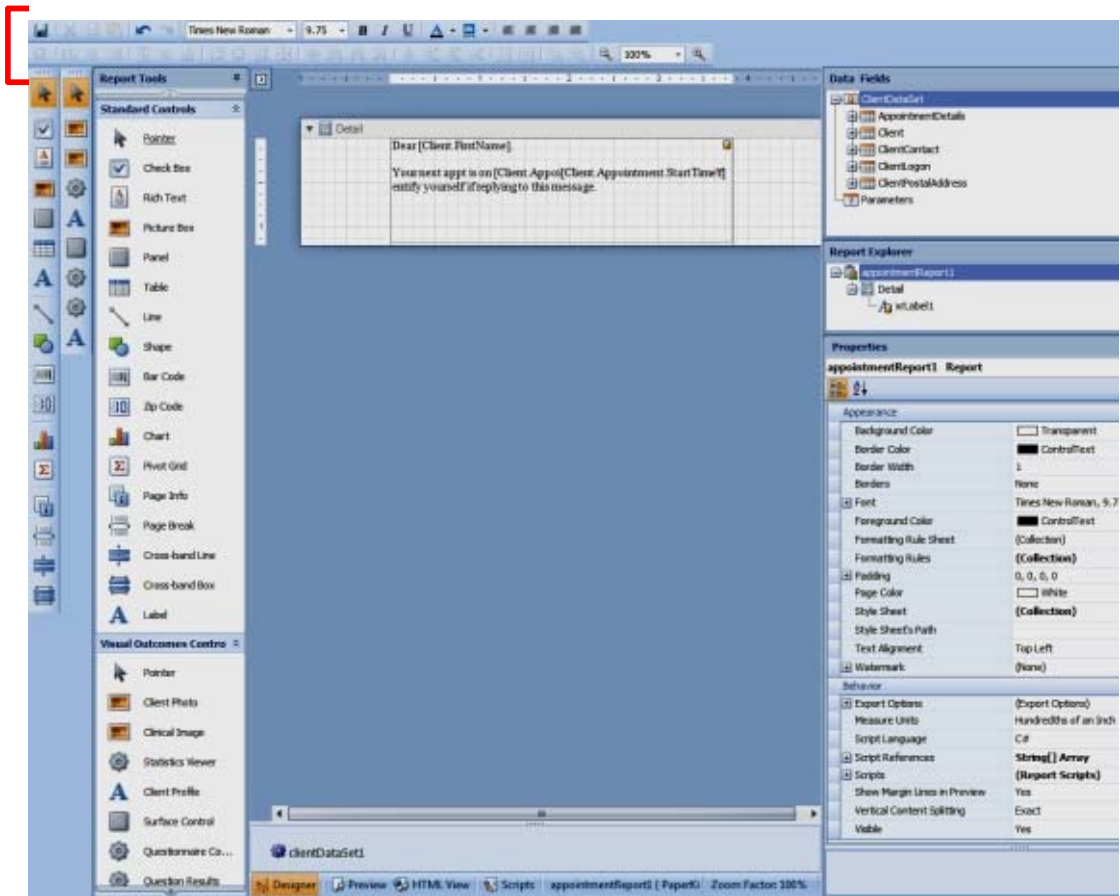
Create a template tailored to sending Recall messages

Template/Report Designer

Overview

The *Template (or Report) Designer* enables you to create and edit Templates. This powerful component allows templates of almost unlimited complexity to be created.

The image below illustrates the *Template Designer*:



Designer Environment

The visual complexity of the designer environment may initially cause some hesitation. It will take some practice before you are comfortable it. But once understood you will appreciate the power and flexibility it provides.

It is important to know that the *Template Designer* does not function like a word processor. The designer is more similar in function to PowerPoint, in that it allows objects (text, images, etc) to be placed anywhere on the screen.

The designer has two modes of operation:

Design – this is where you build your Template by placing control onto the document; and

Preview – this shows what the Template will look like on a printed page.

The *Template Designer* contains many different elements. You should take time to understand how they work.

The following is the list of all interface area of the *Report Designer*:

Element	Description
Design Panel	This is the main element of the Report Designer. It shows the report bands and controls which reports belong to these bands - enabling you to move, resize, copy and paste them, bind them to data and perform many other common operations. An in-built Preview mode shows you exactly what the document will look like.
Main Toolbar	Contains buttons which provide the ability to add save, cut, copy and paste controls, and undo and redo actions in the Designer.
Formatting Toolbar	Contains some actions for formatting report controls such as a label - font, colour, size etc.
Layout Toolbar	Contains buttons which provide the ability to change the size and location of groups of controls. Very handy for aligning multiple data fields such as postal addresses.
Report Tools	Contains all the report controls and is used to drag and drop new controls onto the report's area.
Report Explorer	Shows a report's structure in a tree form and provides easy navigation through the report.
Data Field	Shows the structure of the data source which is bound to the report currently being edited in the Report Designer, and is used to bind report controls to data. In the case of User Templates, the data source is called the Client Set. The Client Set contains fields for postal address, contact numbers, login/identification, appointment and general client information such as gender and date of birth.
Properties	Used to change some of the properties of the report elements (bands and controls) by the Report.

Structure of a Template

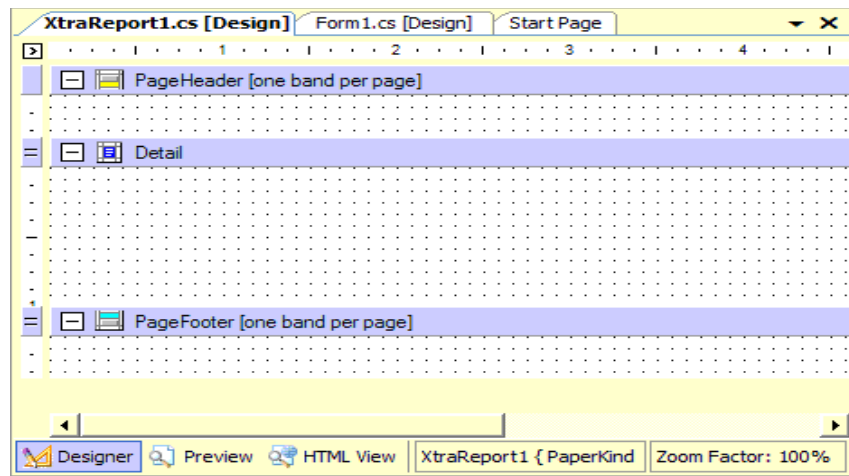
A template/report is divided into sections called Bands.

What is a Band?

A *Report Band* represents a specific area on a report page, which is used to define how to render report controls which belong to it. In the designer, *Report Bands* are represented by the parts of the design surface divided via band strips.

Band Types

When you create a new Template, you can see that the report's area is initially divided into three basic bands (PageHeader, Detail and PageFooter bands) that provide space for placing different report controls on them.



A particular band type specifies how the controls located on this band are rendered, their rendering order and how many times they are rendered (in case of a data-bound report). Note that in the *Report designer*, some band strips may display tips with information on how bands will be rendered e.g. for the *PageHeader* and *PageFooter* bands, the “one band per page” tip is displayed.

There are different band types available. The table below lists them:

Report Band Class	Description
TopMarginBand	The band located on the top margin of every page.
ReportHeaderBand	A band used as a report header. Objects in this band are rendered only once - at the beginning of a report.
PageHeaderBand	A band located at the beginning of every report page, below the TopMarginBand. It is mainly intended to display the header of a table, continued from the previous page.
GroupHeaderBand	A band used to specify grouping criteria and to display information at the beginning of a group of records shown in the DetailBand.
DetailBand	A band used to display a single record from the bound data source at a time, or just to hold controls (if there is no bound data source).
DetailReportBand	A band used to create a master-detail report (the DetailReport band holds the detail report).
GroupFooterBand	A band used to display controls at the end of a group of records shown in the DetailBand.
ReportFooterBand	A band used as a report footer. Objects placed in this band are rendered only once - at the end of a report.
PageFooterBand	A band located at the bottom of every report page, above the BottomMarginBand. It is mainly intended to display the footer of a table, which has been continued on the following page.
BottomMarginBand	A band located on the bottom margin of every page.








Report Tool/Controls










Each band in a report is designed to contain controls. A control can be thought of as a visual object on the report.

A *Report Control* represents a specific report element (e.g. static or bound text, line, picture, check box, etc.) which can be inserted into a report. Report controls can reside either inside report bands or inside other report controls (Panel). The appearance and behaviour of a *Report Control* is defined by its type.

Visual Outcomes provides a variety of *Report Controls* that you can use to construct your Template.

Below is the list of basic *Report Controls/Tools* available:

Standard Controls	Description
 CheckBox	A check box control, to display a True/False or Checked/Unchecked/Indeterminate state in a report.
 RichText	A rich text control to display, enter and manipulate formatted text. You can enter and format its text at design time, load it from an external file, or bind this control to a data field and populate it from a report's datasources.
 PictureBox	Use this control to insert outside images into your report.
 Panel	A panel control which can contain other report controls. Use it to group controls together, which makes their manipulation easier.
 Table	A table control which allows inserting a table containing rows and cells. This control is invaluable if you need to show your data in tabular form.
 Line	Lets you draw vertical, horizontal or diagonal lines in a report.
 Shape	Embed any simple graphics into a report.

 BarCode	A barcode control, which allows inserting many different barcode types into a report.
 ZipCode	Allows the insertion of numbers representing a zipcode into a report.
 Chart	A chart control, which may be used to represent your data as a series view. This control is intended for presenting manually entered data.
 Pivot Grid	Lets you insert your data as pivot view.
 PageInfo	Use this control to display page numbers, the current date or user information in your report.
 PageBreak	Marks where a report should start a new page. Note also that you may use the <code>Band.PageBreak</code> property instead of this control, if you want to break the page just before or after a particular band.
 Label	A label control. This is the basic control which allows inserting single-line or multi-line text into a report. Note that this text may be either static or dynamically populated from a report's data source.
 Cross-band Line	Draws a line across bands.
 Cross-band Box	Draws a box across bands.
Client Photo	Allows direct data binding to the Visual Outcomes Client Image File System. Primarily used to display the Client Photo, this control serves as the basis for the Clinical Image control (see below).
Clinical Image	Based on the Client Image control, this control displays clinical images for each client. You can display images based on category and chronological order. By providing the image category and the chronological position, Visual Outcomes automatically retrieves the appropriate image.
Statistic Viewer	This incredibly powerful control connects directly with the Visual Outcomes Statistic Engine and Database. It allows you to embed any statistic into any report and choose the type of presentation for that statistic: as a Grid, Pivot or full colour chart. When used in a 'Mail Merge' template, this control binds directly to the Client. This provides the template with client specific statistic, ranging from a list of appointments, to clinical results. A tick box called CancelOnEmpty allows the statistic to render invisible when the statistic returns no data.
Client Profile	Retrieves client specific Clinical Notes directly from the Visual Outcomes Database by simply dragging this control onto your template. Allows you to set the Clinical Note Type and its chronological position to display the appropriate clinical data.
Surface Control	This provides all detail from a Client Work surface. You can determine what data is shown (Image, Detail and Symbol Data) and the layout of the data (Vertical or horizontal). Just like the Clinical Image and Clinical Note control, this control enables you to display a Work surface based on the category and its chronological order.
Questionnaire Control	Retrieves a client-specific Questionnaire directly from the Visual Outcomes database.
Questionnaire Part Control	Retrieves a Questionnaire part from client-specific Questionnaire
Questionnaire Section Control	Retrieves a Questionnaire section from client-specific Questionnaire
Question Control	Retrieves a Question from client-specific Questionnaire
HTML Control	This control represents an HTML text box to help create HTML templates.
VO Info Control	Used to add the Current User ID, Current User Name, Current Practitioner Name or Clinic Name.

VO Scalar Report Control	Enter custom SQL queries into a template and the result is returned and displayed in a Label. This control is Client and Clinic Aware, meaning you can create queries that refer to the current Client in the Client Director or the Clinic presently logged into.
--------------------------	---

Working with Controls

Report controls can be added to a report via the Report toolbox. Simply click the necessary report control in the toolbox, then drag and drop it onto the report. The control will be placed under your mouse cursor and activated. A 'wire frame' will appear around the control. This indicates that the control is currently selected/activated.

When a control is active, you will notice a little box appear with an arrow in the right hand upper corner. This is referred to as the 'Action Button'. When this button is pressed, an 'Action Panel' will appear that displays a list of properties that can be changed.

Once active, you can move and resize the control by using your mouse and/or keyboard arrows:

- To select/activate a control, simply click the control;

- To delete a control, simple activate the control and press 'Delete'.

The following image outlines control activation and other information:

Binding Controls to the Visual Outcomes Database

The *Template Designer* is connected directly to the Visual Outcomes Database, enabling you to create mail merge documents quickly and easily. The 'Data Fields' panel contains a list of the currently available Data Fields. When a control is connected to the Database, a 'cylinder' appears in the right hand edge of the control.

There are two ways to bind a control to the Database:

Drag and Drop from the Data Field panel:

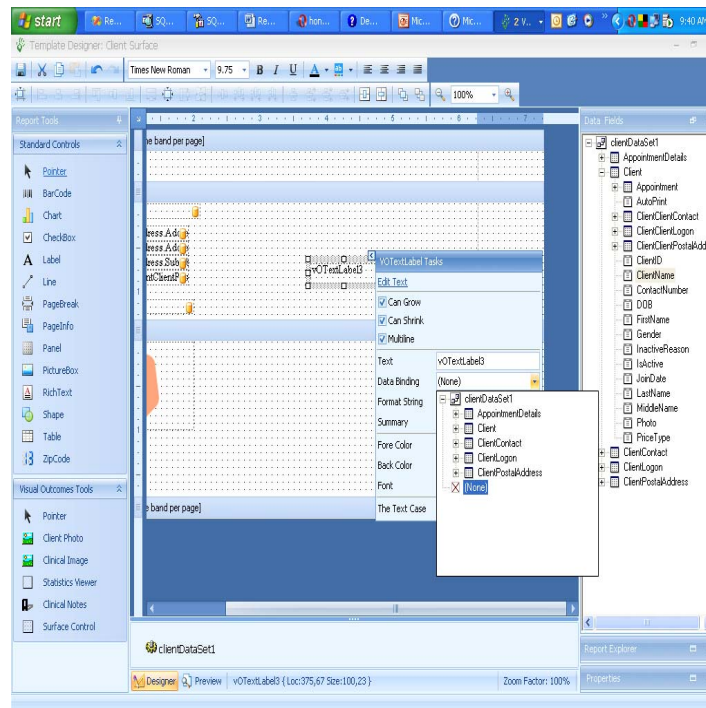
Select the field and drag over to the design surface and release the mouse button. The control will display the field name and a 'cylinder' to indicate that the control is bound.

Depending on the field selected, the designer will attempt to select the appropriate control. For example, if you dragged the 'ClientName', the Designer will choose a 'Label Control' or if you dragged the 'AutoPrint' field, the Designer will select the 'Checkbox Control'.

Manually Set the Binding:

Depending on the control, you can manually set the 'Data Binding' property. These properties (if available) can be changed by the control's 'Action Panel'. The property is called 'Data Binding' and when selected will display the data fields available:

- Select the field and the control will display the 'cylinder' indicating that the field is connected.



Formatting Controls

Once a control is on the Designer, it can be formatted. Depending on the control, different options are available. The most common are:

- Font** – specifies the font of the text to display;

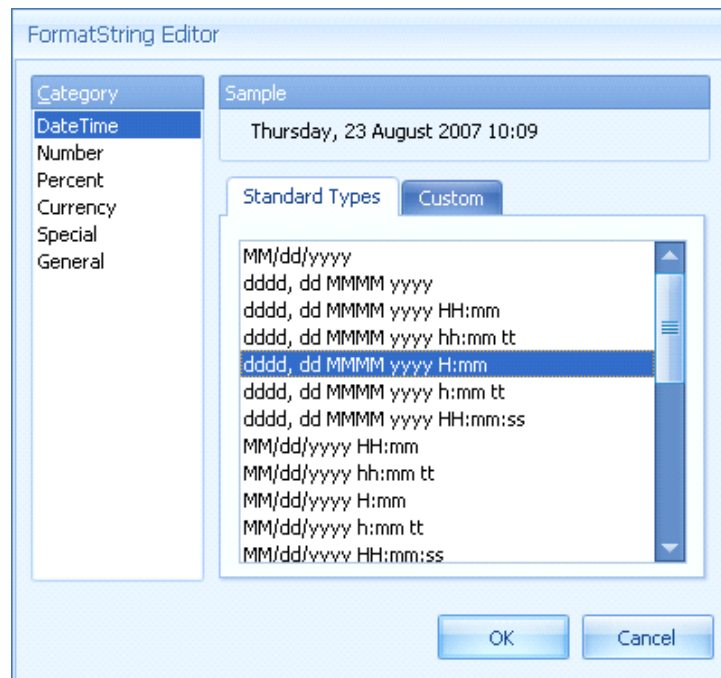
Fore Colour – sets the colour of the text;

Back Colour – sets the background colour of the control;

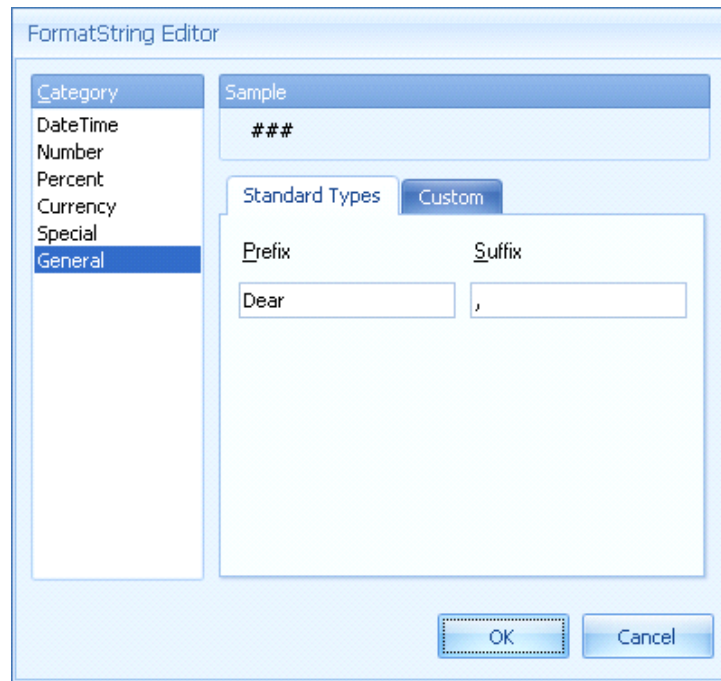
Can Grow – enables the control to automatically include the entire contents of the text. All controls below the expanded control will automatically move down to compensate;

Can Shrink – shrinks the size of the control to its contents. This is very useful for address labelling, for example, if the AddressLine2 of a client is empty. When this option is checked, the control will completely disappear from the printed version. All controls below the 'shrunk control' will be moved up to compensate.

Format String – this option gives you the ability to 'format' the value of the control. For example, if we drag the DOB (Date of Birth) field onto the designer, when the 'Action Panel' is activated, we can see the 'Format String' option. Click the button to activate the *FormatString Editor* window. By selecting the Category, various format definitions will appear for you to choose:



One of the most useful format categories is the 'General' Category. This allows you to place text before or after the data value. For example, following is an image of a salutation format string:



When this format is applied, the value e.g. "David" would appear on the report as "Dear David,".

Before we can proceed, we need to understand the 'Client Data Set'. This is the key component in creating rich client documents.

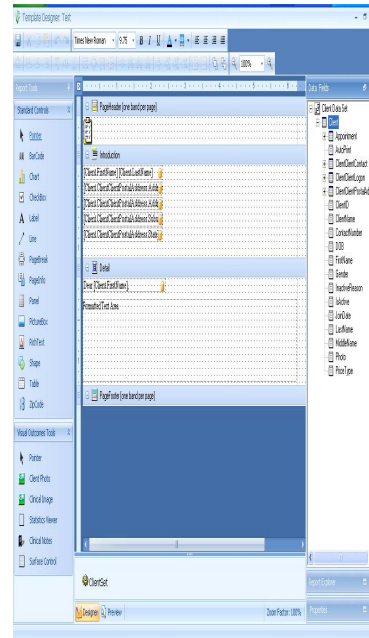
The *Client Data Set* is a 'container' of client data. In this container there are five primary sources of information:

- Client** – this holds general information about the client such as 'First' and 'Last Name';
- Client Contact** – this holds information relating to the client's contact details such as email address and SMS;
- Client Postal Address** – this is the client's postal address;
- Client Logon** – this contains information relating to the Client's login credentials for check in and web access;
- Appointment** – this contains information relating to a client appointment.

This is represented on the *Designer* in two ways:

- The Data Field Panel** - this panel contains a tree view of all the data fields available. From this panel, you select (left mouse click) the data field and drag onto the designer surface; and
- The Data Source Panel** – this panel displays a 'Cog' image and the name currently given to the *Client Data Set*.

The image on the right shows the Client Data Set in the Data Fields Panel.



Multi Data Binding

The two methods described above to bind data fields (drag/drop and manual) only allow a single data field to be represented per control. In most cases this is all that is required (e.g. Address fields), but in other circumstances you may wish to display several data fields within a control.

Consider a client called “John Smith”. The data fields available from the *Client Data Set* are ‘FirstName’, ‘LastName’ and ‘ClientName’. The ‘ClientName’ displays the client in this format - ‘LASTNAME’, ‘FirstName’ (e.g. SMITH, John). In this example, the ‘ClientName’ format is not satisfactory, and we wish to join the ‘FirstName’ and ‘LastName’.

This is achieved by using a technique called ‘multi data’ binding. To multi data bind, you simply type the data fields that you would like.

Let’s imagine that we are working with a ‘Label’ control - we simply type the following into the Text property: [Client.FirstName] [Client.LastName].

Notice the format:

Each data field must be enclosed with square brackets;

The Source of the data field must be fully expressed:

in the example above, the source is ‘Client’;

the hierarchy of the data source must be expressed;

if we were trying to display the client’s email which is located in the ‘Contact’ source under the ‘Client’ source - [Client.Contact.Email]

Spelling and capitalisation are VITAL.

New Templates in Integrated Environments

Create a New template:

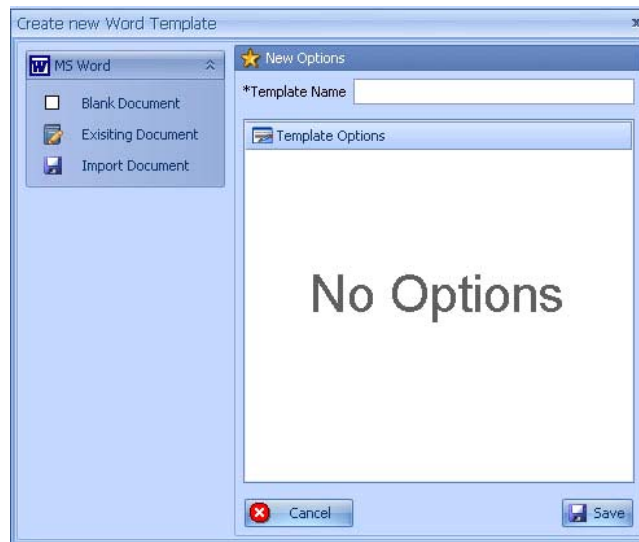
Please do not use New Template unless you have followed and completed the Template Manager tutorial in this manual. You can also log into the Visual Outcomes website and follow the tutorials in Documentation – Training Library.

Select a template base to work on, type new template name, save and proceed with the editing process in Template Manager.

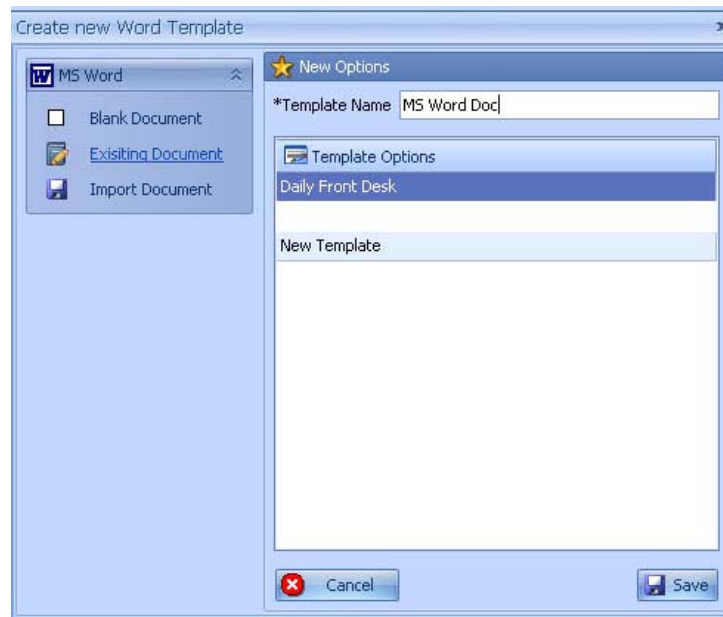
Create MS Word Template:

(Please note that using MS Word Templates varies from others)

- Select External Templates;
- Enter a Template Name;
- Select a template base to work on;



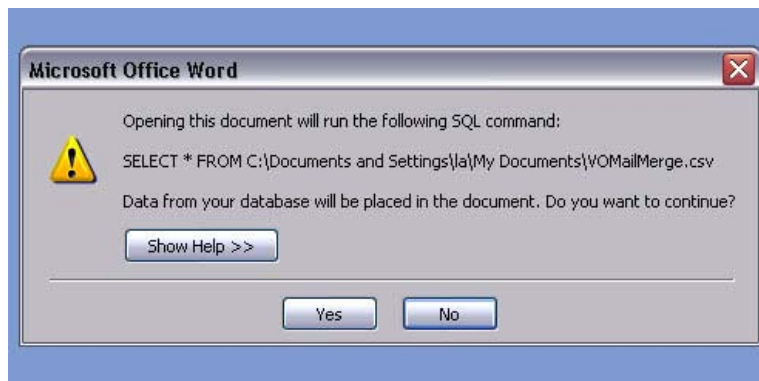
Import Document will allow you to base your Template on one of your existing PC MS Word documents: click on Import Document option; browse to the document you want to import; highlight and open. After Visual Outcomes confirms that the document has been imported, the *Create New Word Template* window will close. Reopen it again by clicking on the *Create MS Word Template* option, then select *Existing Document* option, select the document you want to use, type Template Name, and Save.



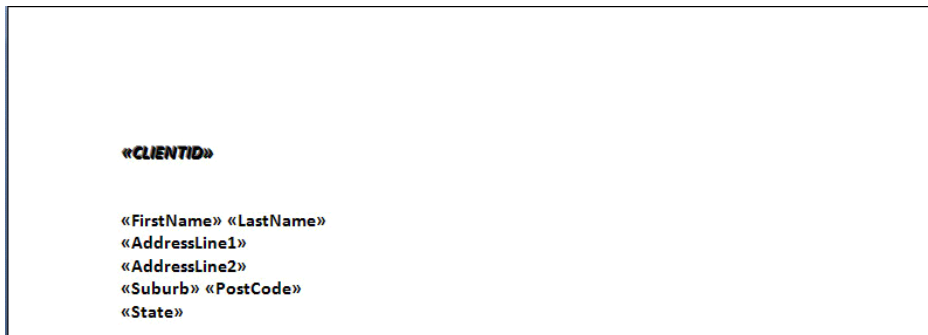
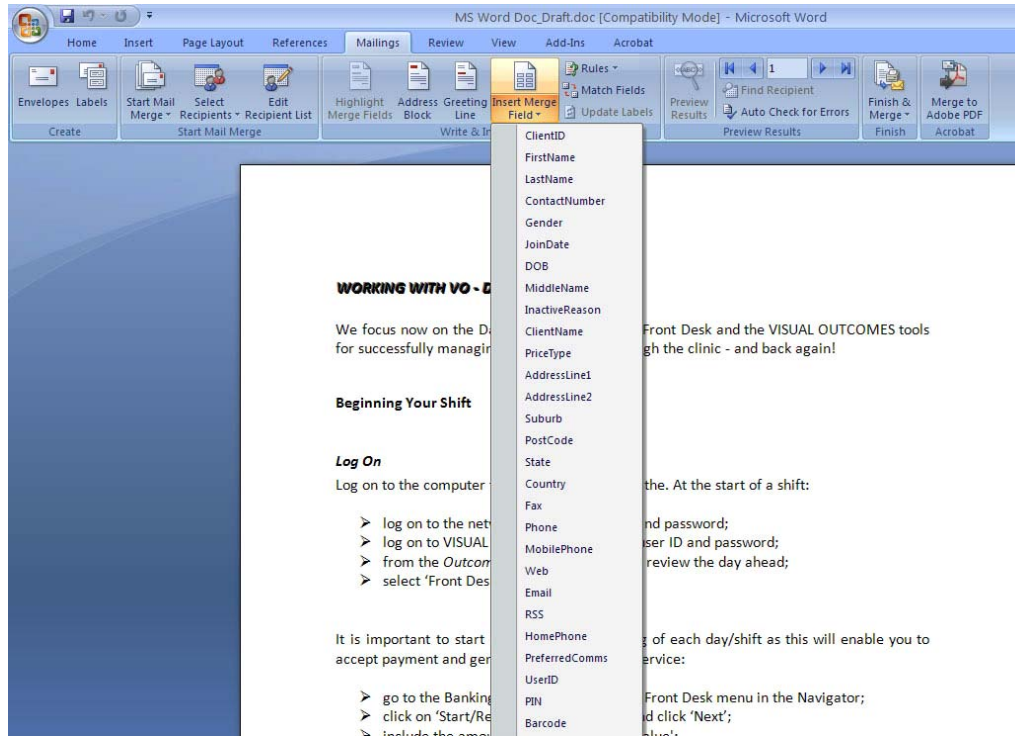
Under *User Templates* find the document name you've created, select it.

****MS Word templates WILL NOT render correctly on the screen***

“Edit” will also “view” your MS Word document - clicking on Edit will send you to the MS Word environment. You'll see a MS Word message on the screen, select Yes.



Use the *Mailings* tab in MS Word to insert Visual Outcomes Client data fields to document.

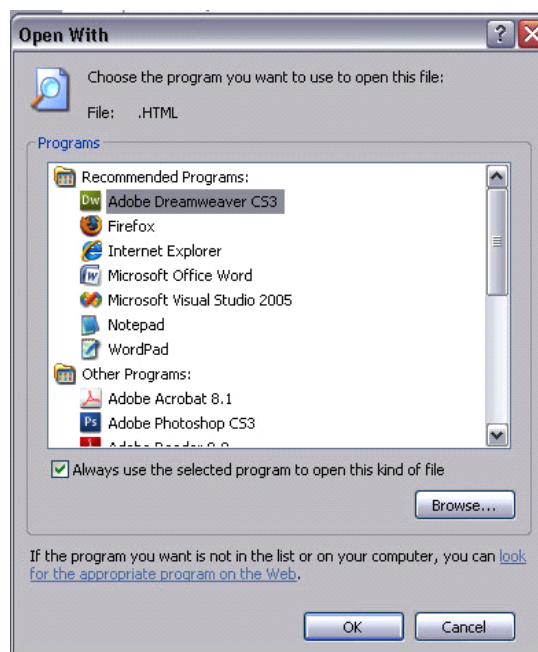
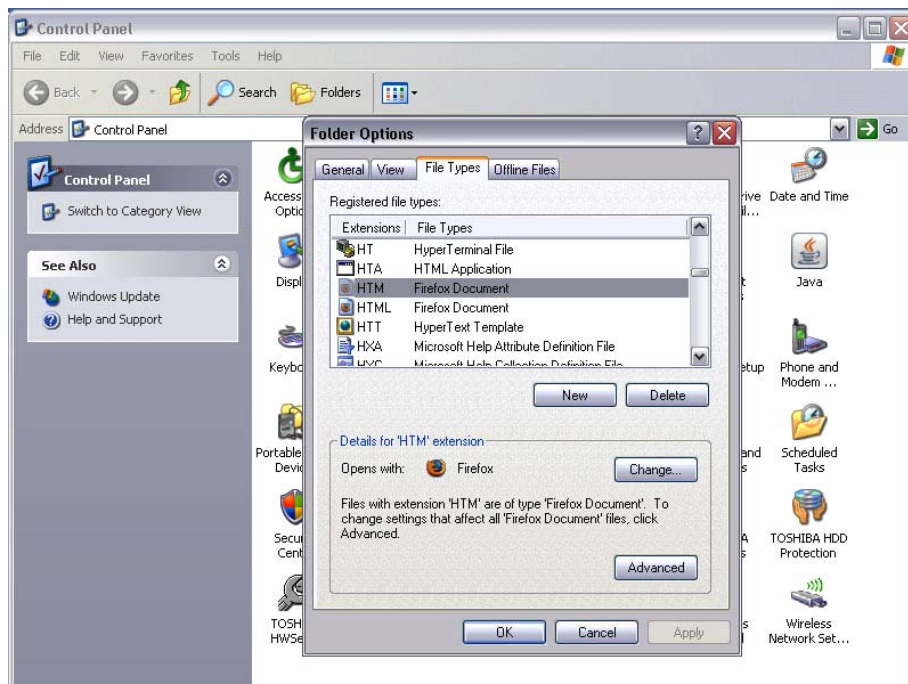


Complete the MS Word document, Save in the MS Word environment, close MS Word, select "Make Live".

Inserted data fields will appear on the document for each client.

HTML Template

This function is only available if you have HTML software. Please indicate in the Control Panel/Folder of your PC what you'd like to use to edit HTML. It can be as simple as *Notepad*, or any other web design software available such as *Adobe Dreamweaver*.



If you don't indicate your choice of HTML editor, the template is likely to open in MS Word which we don't recommend. If it opens a browser please install HTML software to use this VO function.

- Select Blank HTML;
- Create Template name;

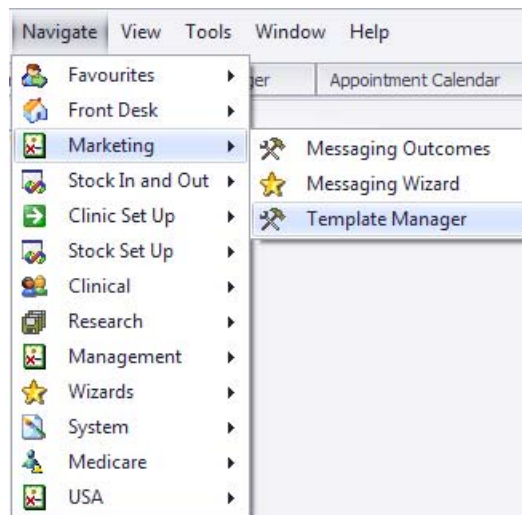
- Proceed as per instructions for MS Word template to create a new live template that will be HTML in your chosen HTML editor;
- Select *Import HTML* to import an existing HTML template from your PC;
- You can download HTML templates free of charge from the Internet;
- Click on *Import HTML*, browse to folder that has the .html file, select file, open, Visual Outcomes will confirm document import;
- To create new HTML template based on the imported document, click on *Create HTML Template* again, type the name of your template, click on *Existing HTML*, select the one you want from the available templates and 'Save'.
- To Edit a created Template, click on *User Templates*, find the one you need and select it. Edit template in your chosen HTML editor, save, then select "Make Live".

User Templates

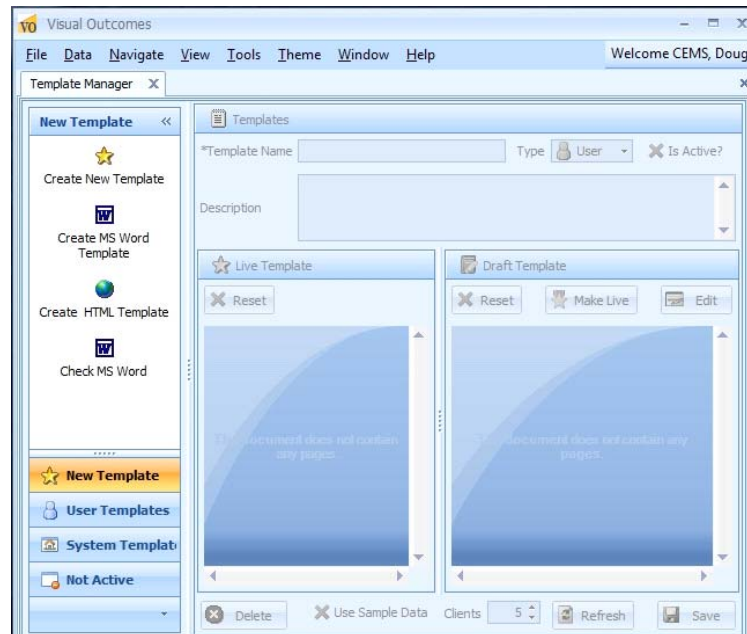
- Select a User Template;
- Enter the Template Name and description;
- Please do not select User Templates for editing unless you have followed and completed this tutorial manual (Part 6: Visual Outcomes Champion) specifically on Template Manager. You can also refer to the Customer Care menu on the Visual Outcomes website.

How to create an Appointment Reminder Bulk Message

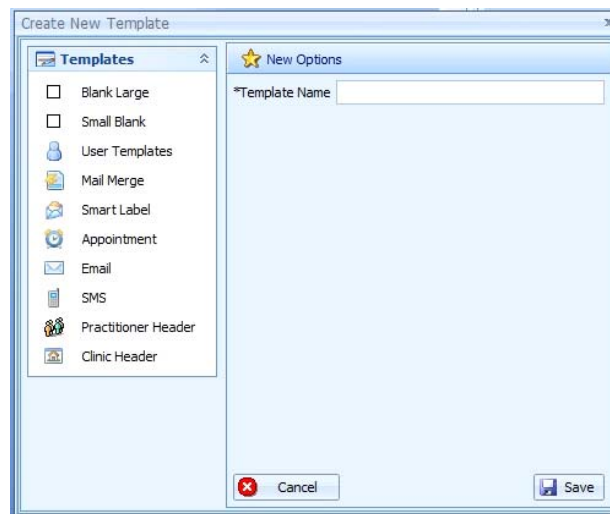
- Open 'Template Manager' through the *Marketing* tab in the *Navigator*;



- Select 'Create New Template';

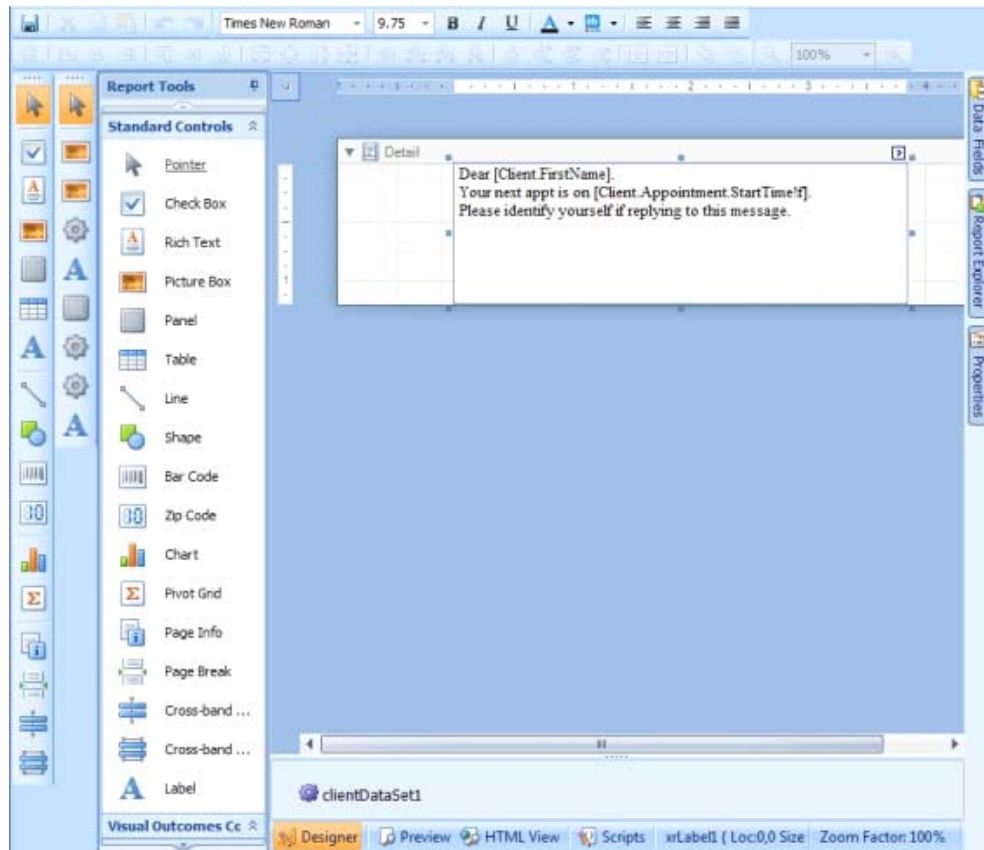


- The 'Create New User Template' window is displayed - select 'Appointment';



- Type the new template name in the 'Template Name' field. The name has to be different, e.g. "Client Appointment Reminder";
- Click 'Save';
- Choose 'Use Sample Data';
- Click 'Refresh';
- Click the 'Edit' button on the right hand side of the *Template* window;

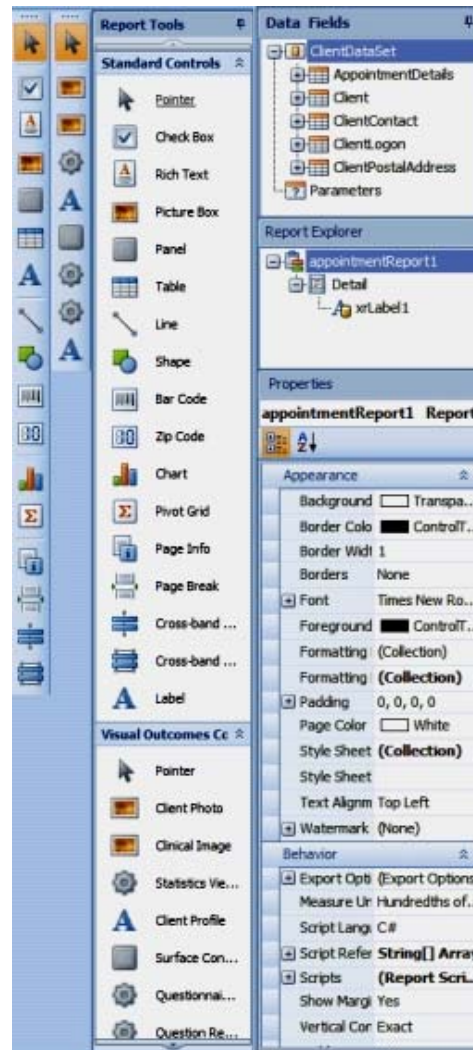
Template Designer window will be open;



At the top of the window you will see the Toolbar;

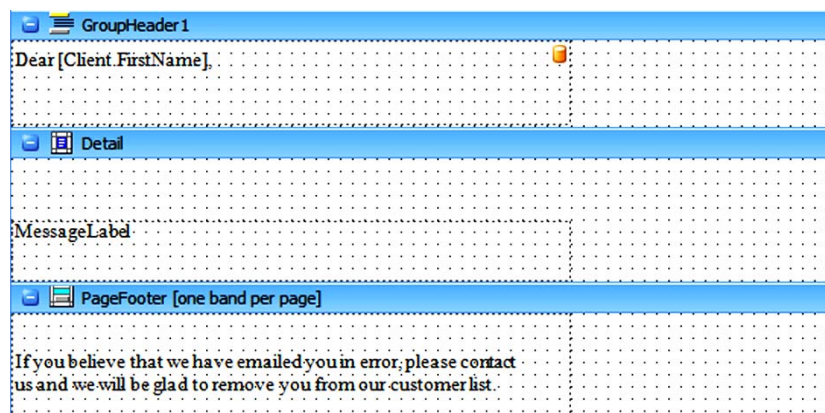


On the left hand side is the 'Report Tools' window with groups of Controls - 'Standard Controls' and 'Visual Outcomes Controls'. These Controls will allow you to insert various attachments to your template;

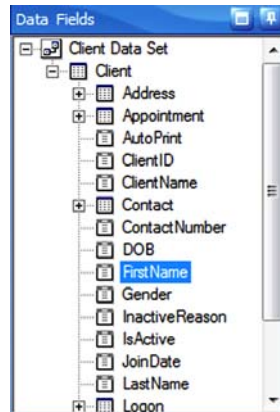


On the right hand side will be the 'Data Fields' window showing Controls that will insert Client data; the 'Report Explorer' window that shows Template details and the 'Properties' window for every detail on the Template.

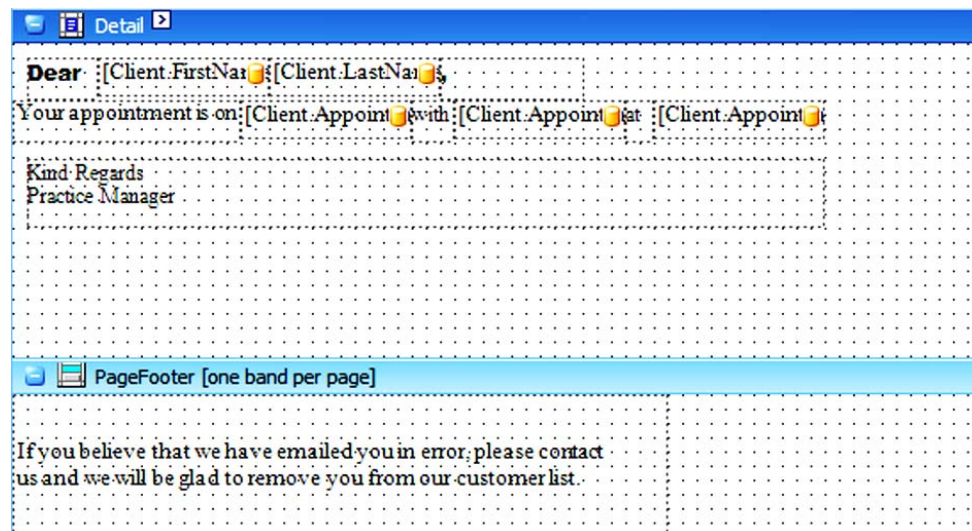
You need to do all additions and editing on the Template:



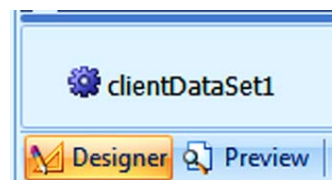
- To edit, double click on relevant part of template, highlight text and relevant data, make changes and type your own text. You can delete any unwanted parts of template by highlighting them and click 'Delete' or through right mouse click menu;
- To insert a Control, drag and drop it from the relevant window. If inserting multiple Controls check Data Binding (refer to *Template Manager* above).



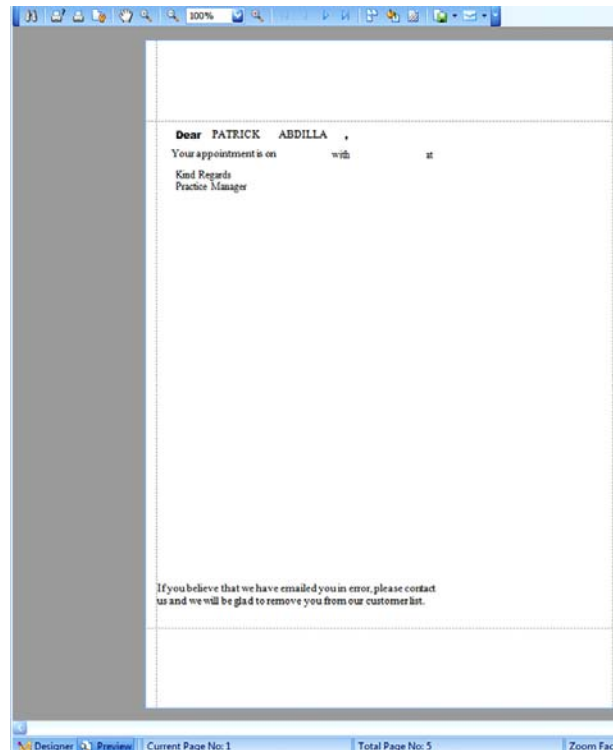
The easiest way to insure that the Data Binding is correct is to type it in manually, e.g. [Client.Appointment], [Client.Appointment.Practitioner] and bind to *Client Set*.



- Check that you have only one Client Set;



- View all changes by clicking on the 'Preview' button;



- You can change font and size via the 'Properties' window on the bottom right hand side of the *Template Manager* window. Make sure that control is 'active' to enable you to make changes;
- Save Template by clicking on the 'Save' icon in the top left hand side corner of *Template Designer* window;
- Close *Template Designer* window by clicking the 'Close' icon on the top right hand corner;
- 'Save' the Template once more, when prompted;
- You will now return to the 'Edit' window. 'Save' the Template if you are satisfied with it;
- Click 'Make Live' on the top of the right hand side of the window;
- Close 'Template Manager';
- 'Refresh Entire Data Cache' through the 'Data' menu on the main Menu Bar;

Now you can start the *Messaging Wizard* and send bulk messages.

NOTE: The Template Designer no longer needs to be closed down before viewing other Visual Outcomes windows. For example, you can be working in the Designer, switch to view the Appointment Calendar and back again without saving and closing first.

However, be aware you must NOT close the Template Manager until the Designer is closed.



<http://visualoutcomes.com/index.php/home-secure/documentation/training/training-videos-part-6/>

10. Mail Merge Functions

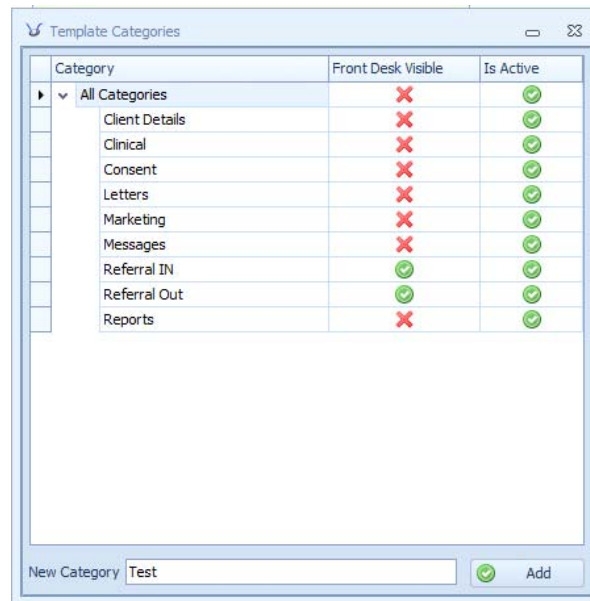
Templates Categories

You can categorise User Templates through Navigate/Management/Template Categories:

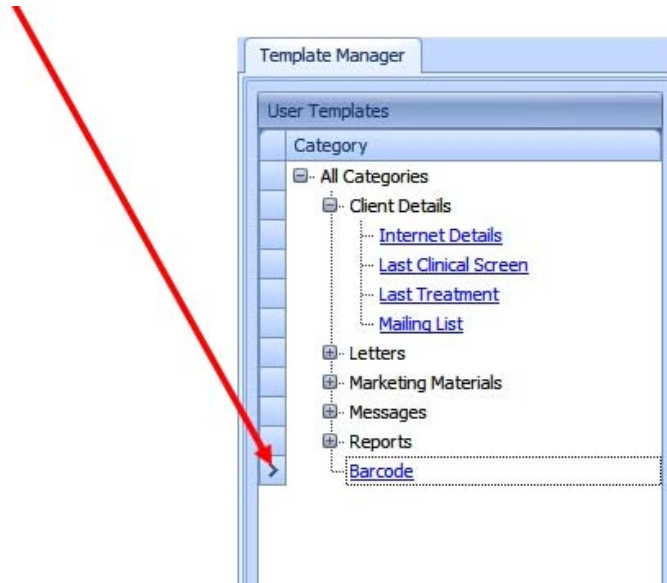
Note: If you using for first time, it should first be assigned to your Security Role by CEO in Security Wizard as new Security Window.

To create new Template Category:

- Type name in New Category field and click 'Add'.



- Once the category is added to the list, select whether or not the template should be visible for Front Desk and tick **Is Active**.
- The new category will automatically be saved under All Categories until moved.
- To sort out Templates via Categories:
- Go to Template Manager, click on User Templates, click on left hand blue arrow to select the template you want to move, hold your mouse down, drag and drop template into desired category;



Drag and drop it to desired category:



Template Categories may be moved directly in the Template Categories window.

11. Messaging Wizard

Visual Outcomes provides an inbuilt report/template mechanism that can be used to perform batch print runs, SMS sending and bulk emailing. This is also referred to as “mail merging”.

There are three steps to successfully sending messages:

Client Selection:

Using the integrated statistics engine, you can select from a vast array of client lists;

You can manually choose clients as well;

Report/Template/Message Selection:

Depending on the type of the message, you either select a User Template or “simple text”;

Output:

Activate the sending of the messages to the printer, email server or SMS provider.

Any *User Template* can be sent to the printer, SMS provider or email. When sending via SMS, it is very important to remember that only text will be sent. *User Templates* that generate images should not be used for SMS. When sending email, you can choose the format that you would like to use such as jpg, PDF or text.

Functional components of Visual Outcomes system for messaging:

Message Master

Message Master is a Visual Outcomes feature that enables you to create specific client sets for bulk messaging. You then schedule the Message Master into the Auto Mailer to send out.

Auto Mailer

Though it is accessed within your Visual Outcomes application, Auto Mailer is independent of the Visual Outcomes main application. See it as a Visual Outcomes utility with a specific purpose within the Visual Outcomes application for your messaging needs.

This is where you set up your schedules for bulk messaging to be sent and track the results as to which client has received their messages and or across the whole mailing.

Auto Mailer reads the database Message Masters and sends these via your SMTP server (simple mail transport protocol). You are then linking to an external provider for the Visual Outcomes application to send your clients any messages (SMS, email).

SMTP

Email - Your server sends to clients

SMS - Your server sends to your own SMS provider

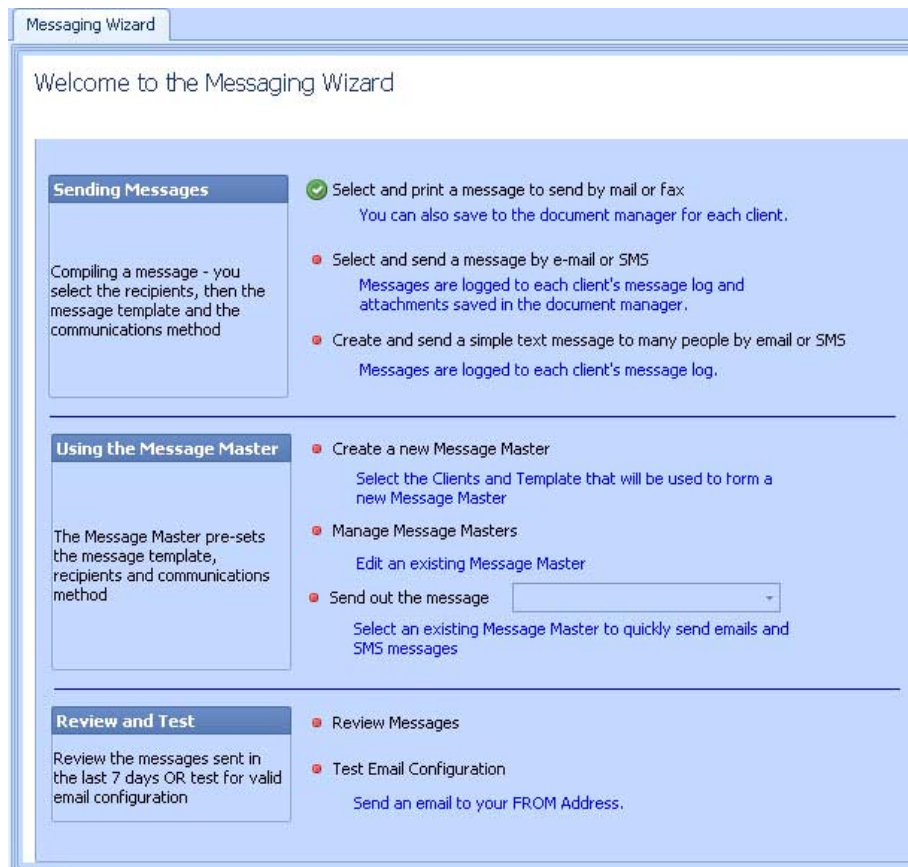
The message is sent to the SMTP server and from there if an email blast it goes straight to the recipients (pushed out to the clients).

If it is intended as an SMS it has a tag that then sees it goes to your SMS provider and they convert to a text and send it on. You have a separate arrangement with these SMS providers and this is external to Visual Outcomes.

Problems here in your SMTP can occur. This means that you need to look at the **logs of your server** (NB these are NOT logs from within Visual Outcomes and Visual Outcomes does not use these logs). These logs are to be reviewed by your IT administrator. Errors of message transmission can be due to this SMTP server being mis-configured and /or not allowing the number of messages you want to send to pass.

Starting

Access the 'Messaging Wizard' from the *Marketing* menu in the *Navigator*. The Welcome screen is divided into the main Messaging Wizard functions: Sending a Message; Using the Message Master; and Review and Test.



Under 'Sending a Message' you have three choices:

Select and Print a message to send by mail or fax – print/send any *User Template* from a list of clients;

Select and Send a message by e-mail or SMS - sends a *User Template* to a list of clients;

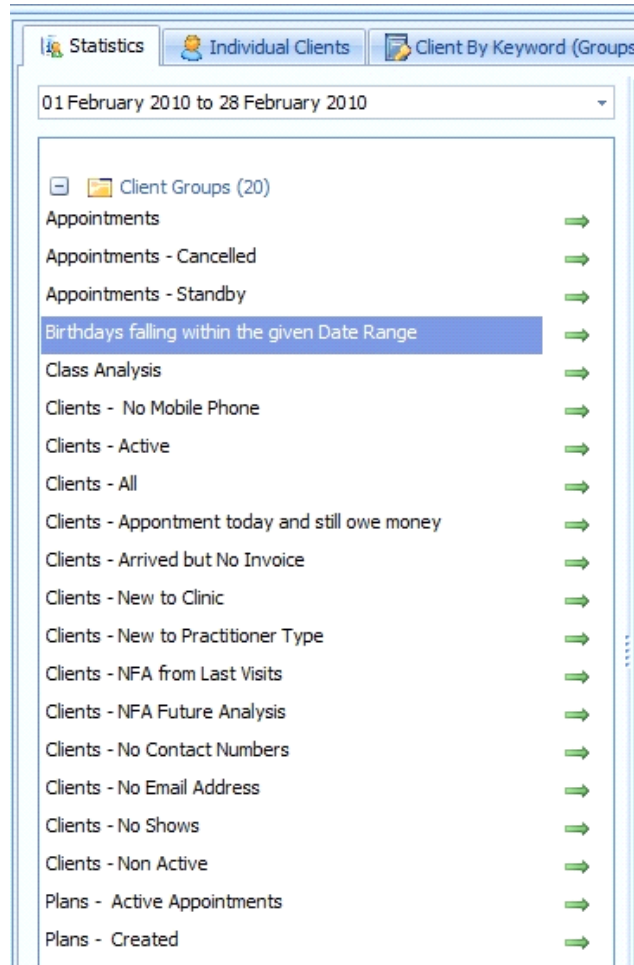
Create and send a simple text message to many people by e-mail or SMS - using a predefined "Simple Message" or your own text, you can rapidly contact your clients;

➤ Make your selection and click 'Next'.

Client Selection

There are three ways to select a list of clients:

Use the in-built statistics



Visual Outcomes filters the available statistics for those that return a ClientID:

- Usually you will need to select a 'Date Range' for the statistic;
- The first five columns will be displayed, with other possible columns available from the 'Customization' window;
- By default, all clients returned by the statistic are selected (included);
- You can toggle between a client 'selection' status by clicking the 'Select All' icon;
- You can use the quick 'select' options to check/uncheck all items or just a set number;
- Further selection is available by clicking on the 'Advanced Filter' button, available for all client sets within the Messaging library;

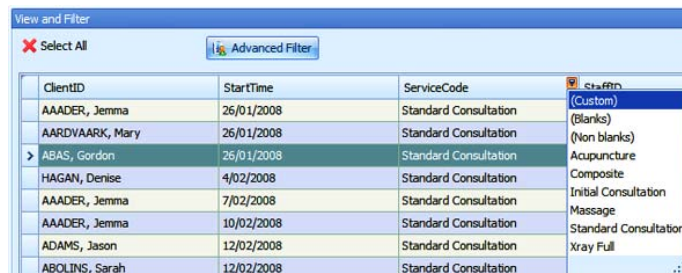


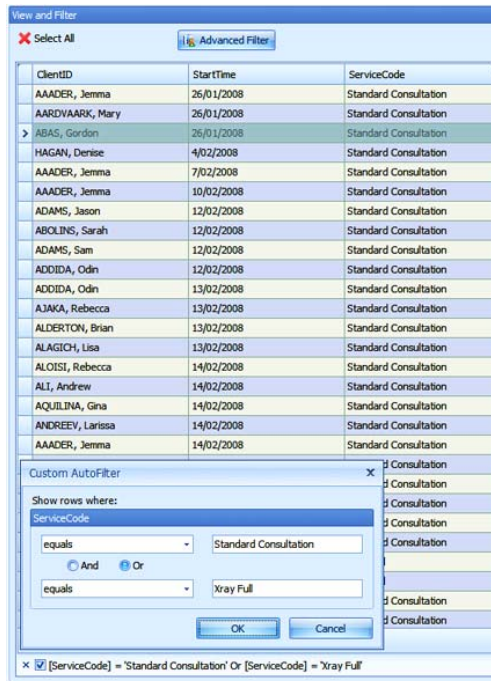
Once the 'Filter' has run, you can then manually select the clients that you want to contact by first clicking on the green 'Select All' tick to change it to a red 'X', then by changing to a green tick in the 'Include' column on the left:

ClientID	StartTime	ServiceCode	StaffID	ClinicName	Inclu...
AAADER, Jemma	26/01/2008	Standard Consultation	CEO	Alpha Clinic	✓
AARDVAARK, Mary	26/01/2008	Standard Consultation	CEO	Alpha Clinic	✗
ABAS, Gordon	26/01/2008	Standard Consultation	CEO	Alpha Clinic	✓
HAGAN, Denise	4/02/2008	Standard Consultation	CEO	Alpha Clinic	✗
AAADER, Jemma	7/02/2008	Standard Consultation	CEO	Alpha Clinic	✗
AAADER, Jemma	10/02/2008	Standard Consultation	CEO	Alpha Clinic	✗
ADAMS, Jason	12/02/2008	Standard Consultation	CEO	Alpha Clinic	✗
ABOLINS, Sarah	12/02/2008	Standard Consultation	CEO	Alpha Clinic	✗
ADAMS, Sam	12/02/2008	Standard Consultation	CEO	Alpha Clinic	✗
ADDIDA, Odin	12/02/2008	Standard Consultation	CEO	Alpha Clinic	✗

You can also make a selection by performing a 'Custom' query:

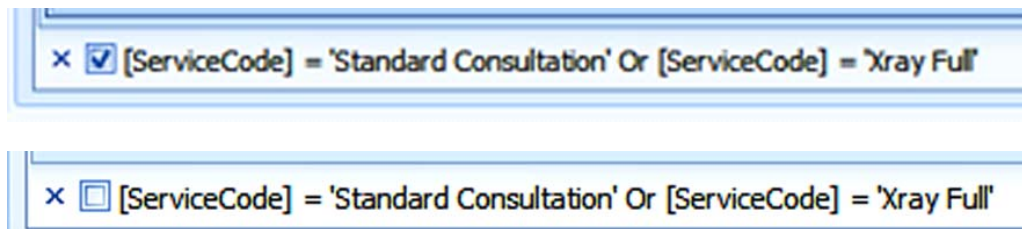
- Click on the 'pin' icon in the 'ClientID' column and select 'Custom' from the menu.



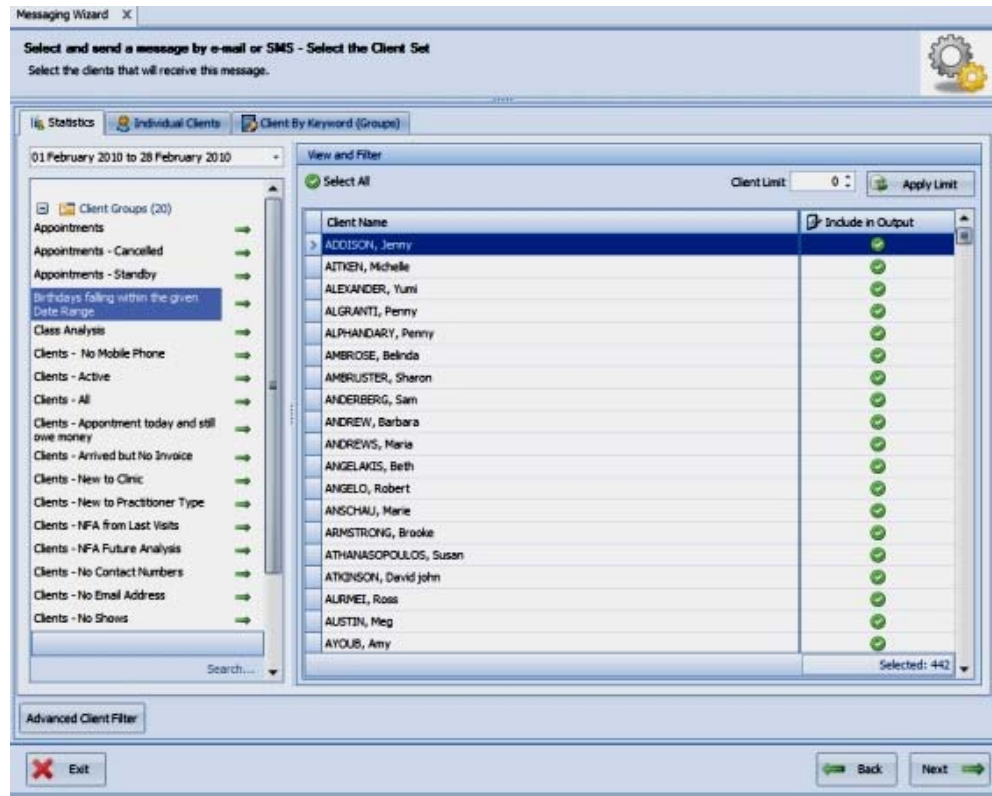


Remember that if you select two options from the same column in a *Custom Query*, use 'Or' and if you select two different columns, use 'And'.

Deselect (reverse selected 'Custom' filter) is available through a tickbox in the Query summary (tick = selected, empty = back to previous selection).



Manually Select Clients

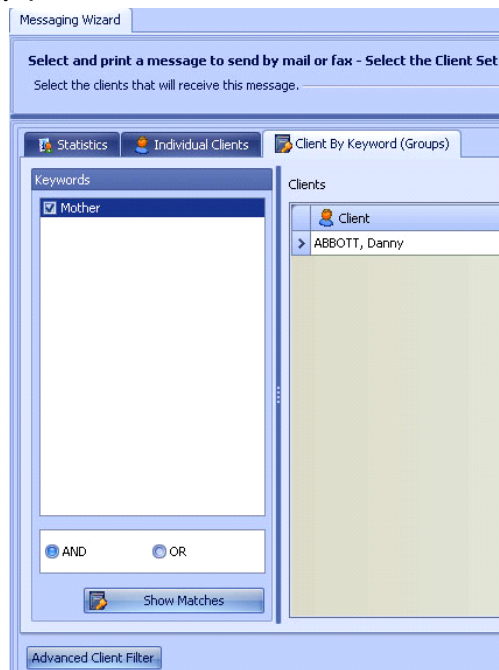


To manually select an individual client or group of clients:

- Select the 'Individual Clients' tab; then

Simply use the '+' button to 'Add' or 'Remove' clients.

Client by Keyword (Groups)



To use a group of Clients by Keyword selection:

- Select the *Client by Keyword* (groups) tab;
- Select the Keyword from the list on the left - use the AND OR buttons to select more than one Keyword – and click the *Show Matches* button.

When your client selection is complete:

- Click 'Next' to proceed to the 'Template Selection' window.

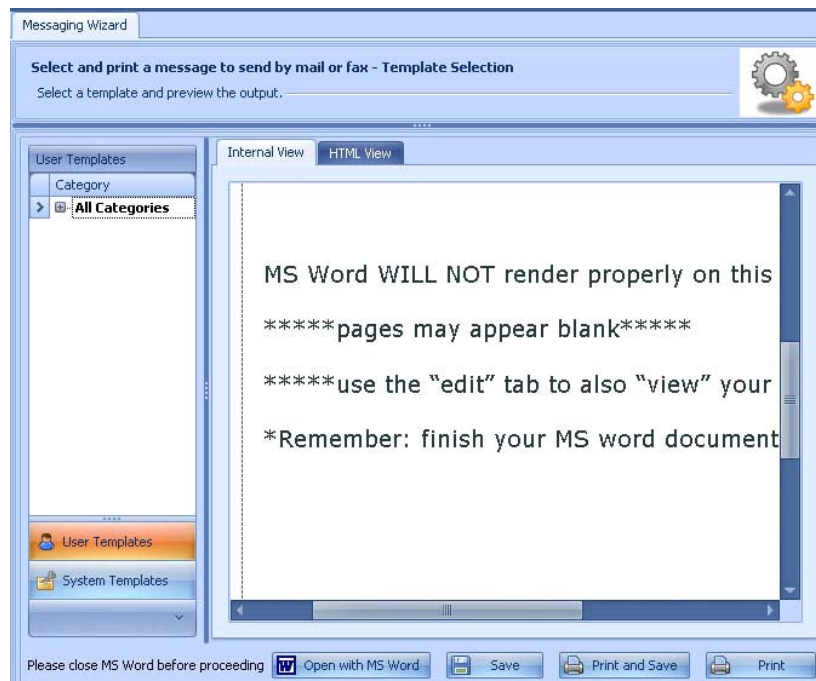
Message Selection

When sending bulk *Personal Messages*, you can use a pre-existing message or create your own.

Visual Outcomes will provide a list of all *User Templates* and *System Templates* that can be printed, using your predetermined client selection.

Select the Template you need and wait for the preview to be loaded;

Note: MS Word WILL NOT render on this screen as you are working on it. The pages will be blank; use the "Edit" tab in Template Manager to view the Word document as you create it. Use "Open with MS Word" button to view in Messaging Wizard.



- Save, Print and Save, or Print your Template*
- *printing HTML not yet supported
- If you are printing a template, click 'Print' and then 'Next'. When the 'Print' button is selected, Visual Outcomes creates a copy of the document on the server and the clients who have received it;
- If you are SMS or emailing, press 'Next'.

Select and send a message by email or SMS

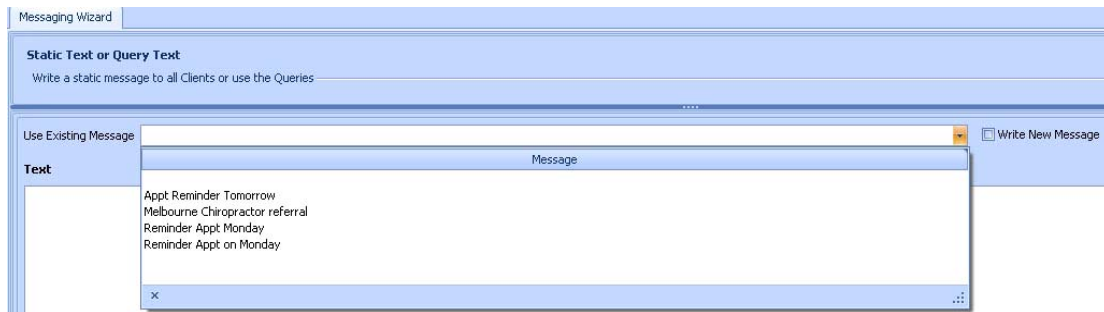
See above for instructions on Client and Template selection

- Once the client group and template are selected, click on 'Next', select Email, SMS or Client Choice for communication media, and 'Start'.

Creating simple text messages

See above for instructions on Client and Template selection

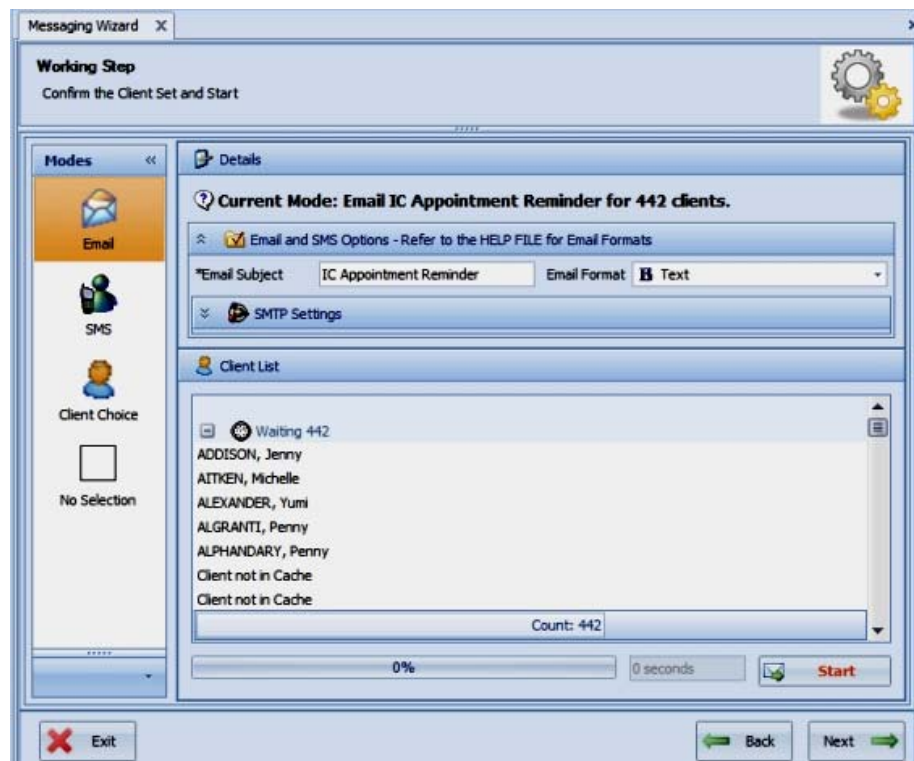
- Once the client group is selected, click on Next. You can *Use Existing* simple message or *Write New Message*.



- Type your message, click 'Next', select Email, SMS, or Client Choice for communication media, and 'Start'.

12. Sending SMS and Emails

This step physically performs the sending of messages/templates. There are several settings that are displayed.



Email – this option emails the template/message in the format specified. You have four choices:
Text – This option reduces the report to simple text. All images are lost

PDF – Creates a PDF document as an attachment to an email

Image – Creates a JPG image as an attachment to an email

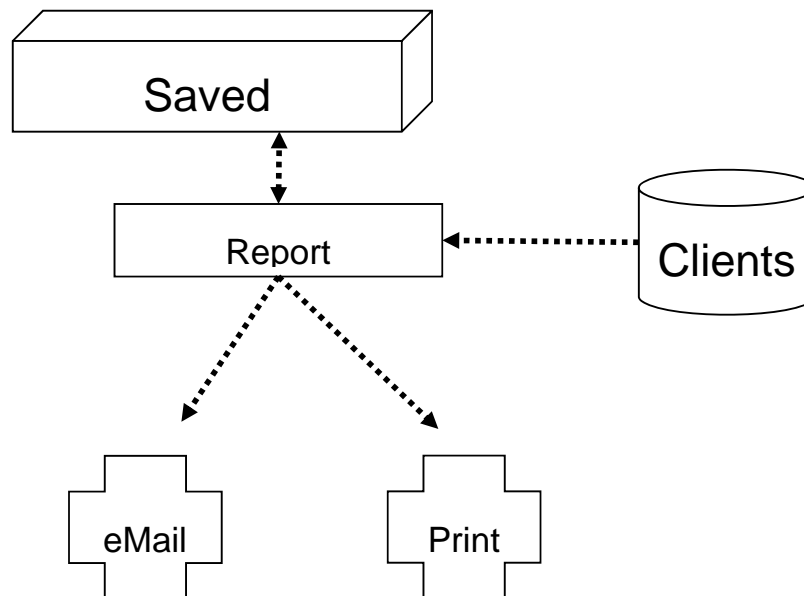
HTML – creates an HTML layout with images stored online

SMS – this option sends an SMS of the template/message in text format.

Client Choice – this option will select medium indicated in Client Wizard

13. How to Perform a Mail Merge

Overview



There are three components to any Report including the Mail Merge System:

What you are sending out:

The 'Report', essentially the equivalent of an *MS Word* Template;

You provide the text layout and data fields required;

By default, Visual Outcomes has a basic report called 'Mail Merge' and 'Client Logon Details';

Managed through *Report Setup*, *Report Designer* and the *Messaging Wizard*.

Who you are sending it to:

The list of Clients and other data elements that are required to populate the report;

The list of Clients is generated by a statistic from the *Management Statistics* interface;

Managed through *Management Statistics* and *Query Wizard*.

Output method - in this case 'Mail Merge':

All reports can be emailed or printed;

When emailing, the system can provide the following formats:

- Text inside the email body;

- As an attached PDF (recommended);
- As an Image;
- As HTML.

Managed through the Messaging Wizard and Configuration Settings.

Example

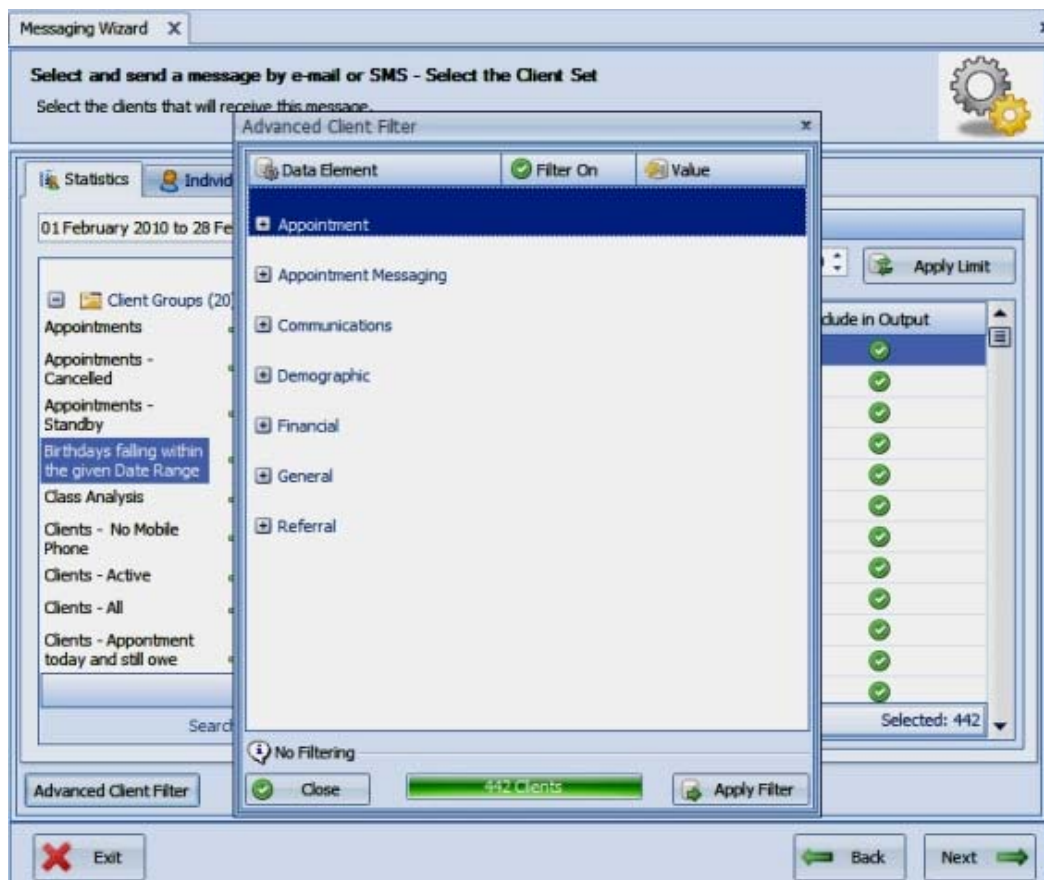
In this example we create a new report for all 'Clients with Forward Appointments'.

Step 1:

- Open the Messaging Wizard (through the *Front Desk* menu in the *Navigator*), then select 'Print a User Template' and 'Next';

Step 2:

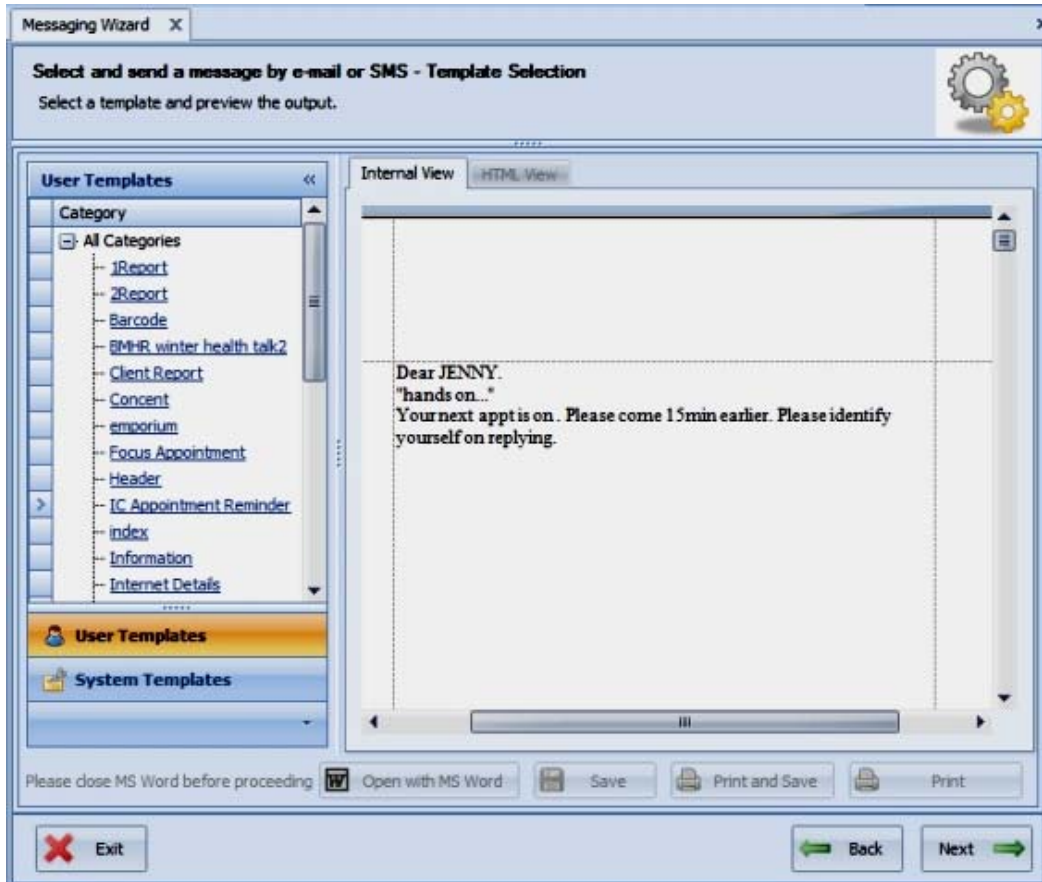
- Browse for the Statistic to display. In this case under the 'Client Report' category, 'Client-Active';
- You can choose to exclude clients by un-checking the 'Include' check box;
- Select from 'Advanced Client Filter';



- When you are satisfied with the Client set, click 'Next'.

Step 3:

- Select 'Mail Merge' from the *System Templates* menu or template you've created from User Templates(see *Template Manager*);



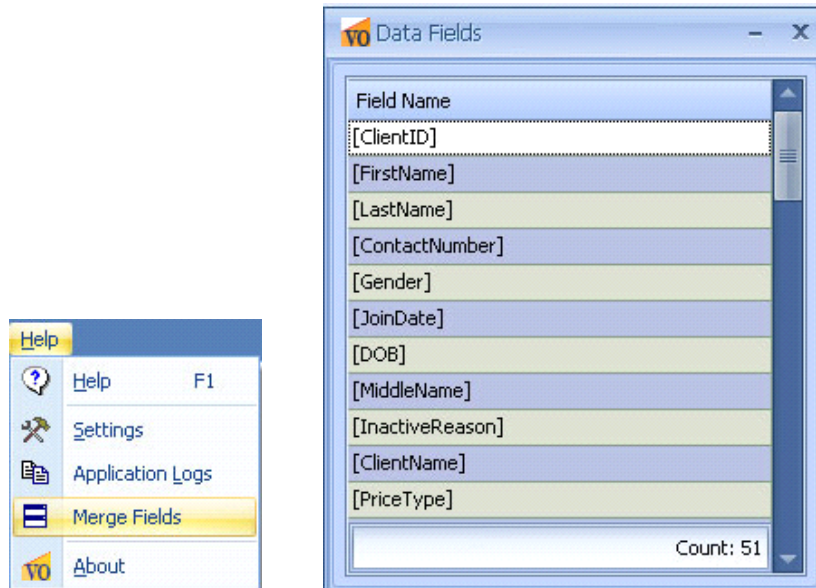
- Click on 'Print', then 'Next' and 'Finish' to end the Wizard.

Mail Merge Assistance

Mail Merge Data Fields Helper

Mail Merge Data Fields helper in the Help Menu is valuable when you're creating a template in Microsoft Word or another application to identify and insert the correct mail merge fields e.g. Client's Name, address etc.

Use Ctrl +C to copy and Ctrl +V to paste field from helper menu to template.



Using the Message Master

The Message Master enables you to set up a message or regular communication within the Message Library. When complete, you may then choose to create an automated communication of a particular message at a particular time to a particular group of clients through Auto Mailer.

Create a New Message Master

- Select a client set as per previous instructions; Click Next
- Select a template; Click Next
- Create a Message Master Name;
- Create template description;
- Select Intended Market Group:

You have already selected from “statistic” groups of clients, “individual clients” and “keyword” interest areas. The ability was there to further select the clients by the advanced filter and/or by removing individuals from the grid. All of the above parameters will be included in the Statistic option.

If you choose “Statistic”: the Message Master will run the statistic, apply advanced filtering and then send to the resulting clients. Use this, for example, when sending out daily appointment reminders – the statistics remain the same but the clients change each day.

If you choose “Clients”: the Message Master will only be sent to the clients specified during the creation of the Message Master.

Messaging Wizard

Message Master Save Step
Update the Message Master

Message Master Name: Report

Description of Master: The 1Report template will be populated with data from the Appointments statistic

Template: 1Report

Market Group

If you choose "Statistic", the Message Master will run the statistic, apply advanced filtering and then send to the resulting clients.

If you choose "Clients", the Message Master will only be sent to the clients specified during the creation of this message master.

Intended market group: Statistic (dropdown menu open showing Statistic and Clients)

Date option for Statistics: (dropdown menu)

Statistic selection: Please select when this statistic in its complete set is to be run in order to deliver this Message Master to the selected target market group

Message Method and Format

Output Method: (dropdown menu)

Email Format: Text

User or System Template selection: Please select the Format for the Message Master

- Select Date option for Statistics;

Messaging Wizard

Message Master Save Step
Update the Message Master

Message Master Name: Report

Description of Master: The 1Report template will be populated with data from the Appointments statistic

Template: 1Report

Market Group

If you choose "Statistic", the Message Master will run the statistic, apply advanced filtering and then send to the resulting clients.

If you choose "Clients", the Message Master will only be sent to the clients specified during the creation of this message master.

Intended market group: Statistic

Date option for Statistics: (dropdown menu open showing Today, Tomorrow, Current Week, Next Week, Current Month)

Statistic selection: Please to be run in order to deliver market group

Message Method and Format

Output Method: (dropdown menu)

Email Format: Text

User or System Template selection: Please select the format for the Message Master

- Select the Output Method;
- Select Format;
- Click 'Next', then 'OK'.

Now start *Auto Mailer* and make a new Schedule to send the Message Master you have just created.

Please review Auto Mailer section for "how to" instructions.

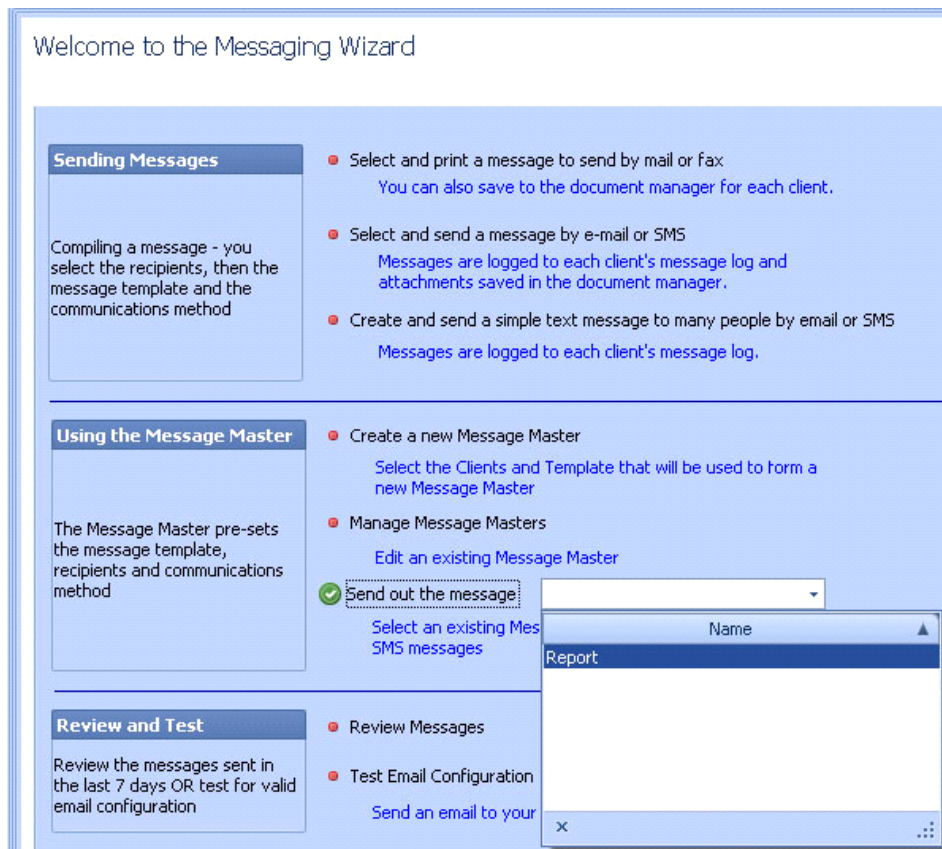
Manage Message Masters

This window is for the management and editing of Message Masters that have been setup and/or sent.

Select one of the existing Message Masters and click Next. Change available options; click ‘Next’, ‘OK’ and ‘Start Auto Mailer’.

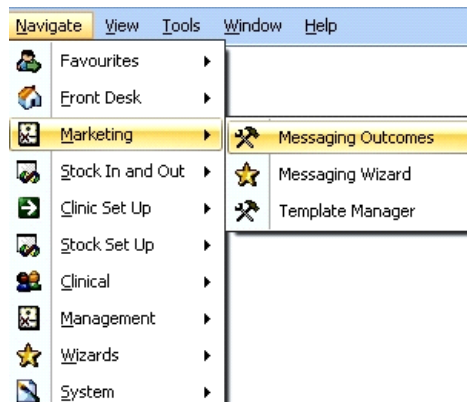
Send out the Message

You can select an existing Message Master to quickly send emails and SMS messages.



After sending your *Message Master*, you can check on its status using the 'Message Outcomes' window:

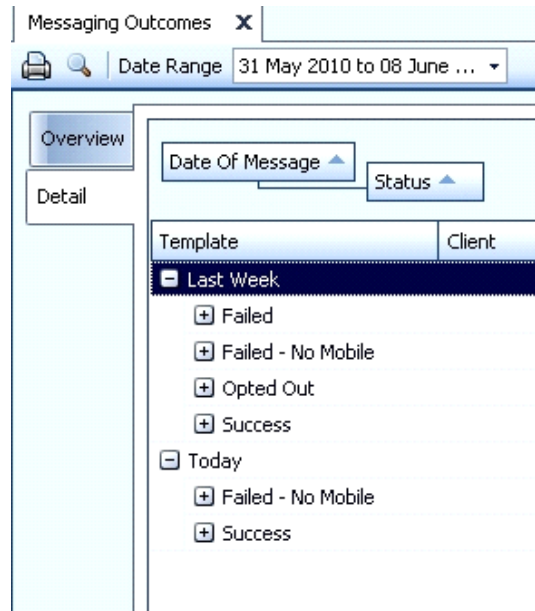
- Go to the “Messaging Outcomes” window in the *Marketing* tab of the *Navigate* menu;



Use the *Date Range* filter to select your message date/s;

The “Overview” tab shows the messaging outcomes figures for the *Date Range* selected;

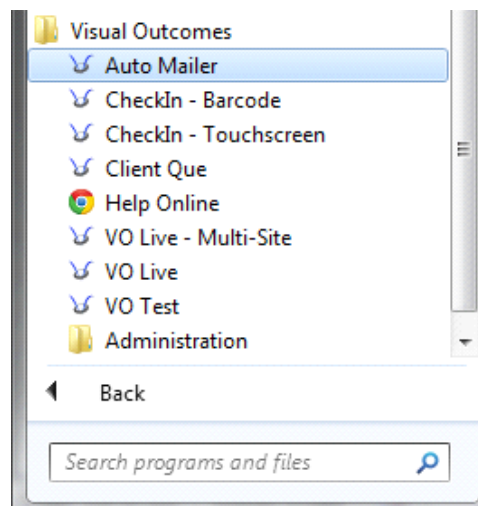
For more information, select the “Details” tab;



- Expand the selection by clicking on the '+' symbol, then again on the outcome options to display a complete list of client contact information to review:
 - "Failed" – the message has failed to reach its destination – an indicator to check the email address/SMS number details for that client;
 - "Opted Out" – the client has "Opt out of Bulk Messages" selected in Client Wizard;
 - "Success" – the message has successfully reached its destination.

Auto Mailer

Auto Mailer is a separate program, integrated with Visual Outcomes that enables you to set up and automatically run all marketing and reminder messages. Auto Mailer can be found in the Start Menu/All Programs/Visual Outcomes.

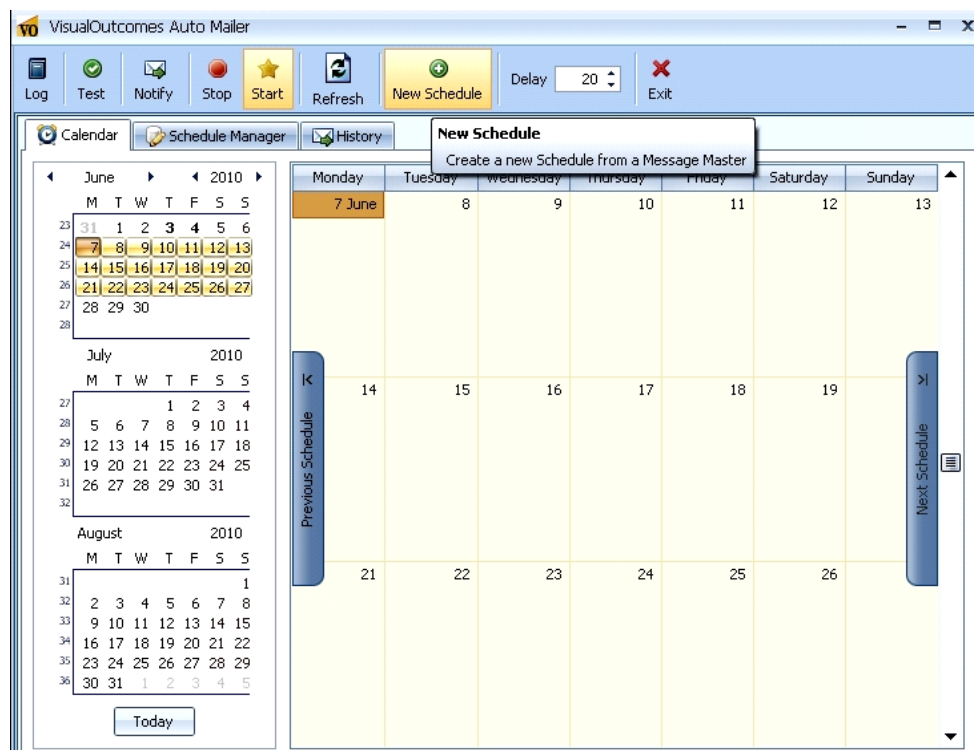


Using the Auto Mailer

Launch Auto Mailer. Note that the application will be running in the background and to open the full window you need to click on the VO icon in the Windows tray on the bottom right hand corner of your screen;

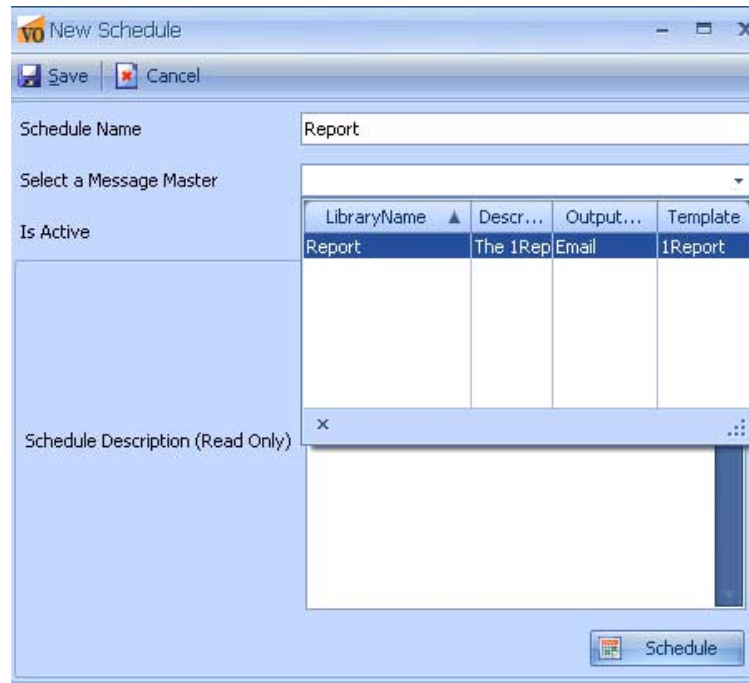


- Click the 'New Schedule' button from the top menu;



In the New Schedule window:

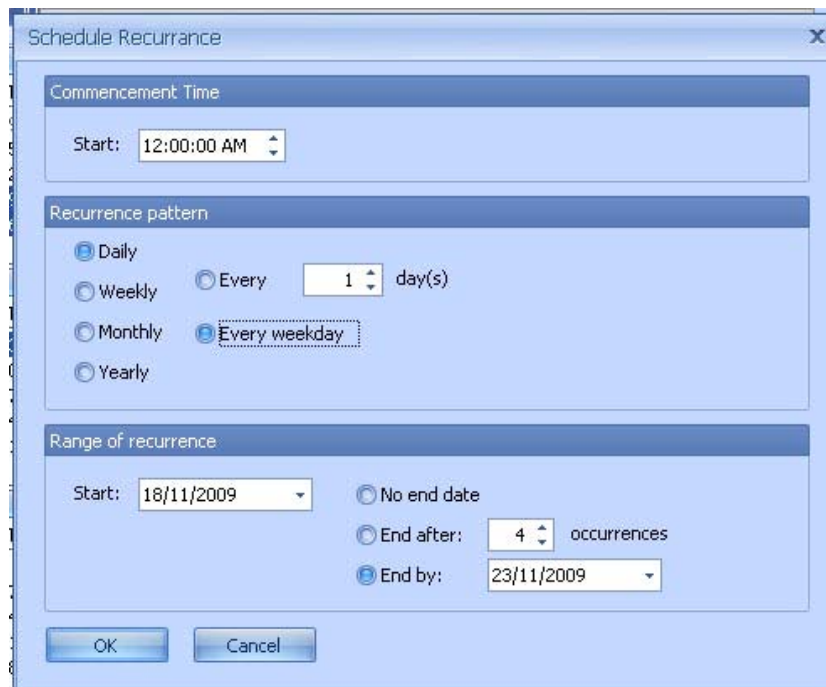
- Fill in the Schedule Name;
- Select the Message Master you wish to use from the drop down menu;



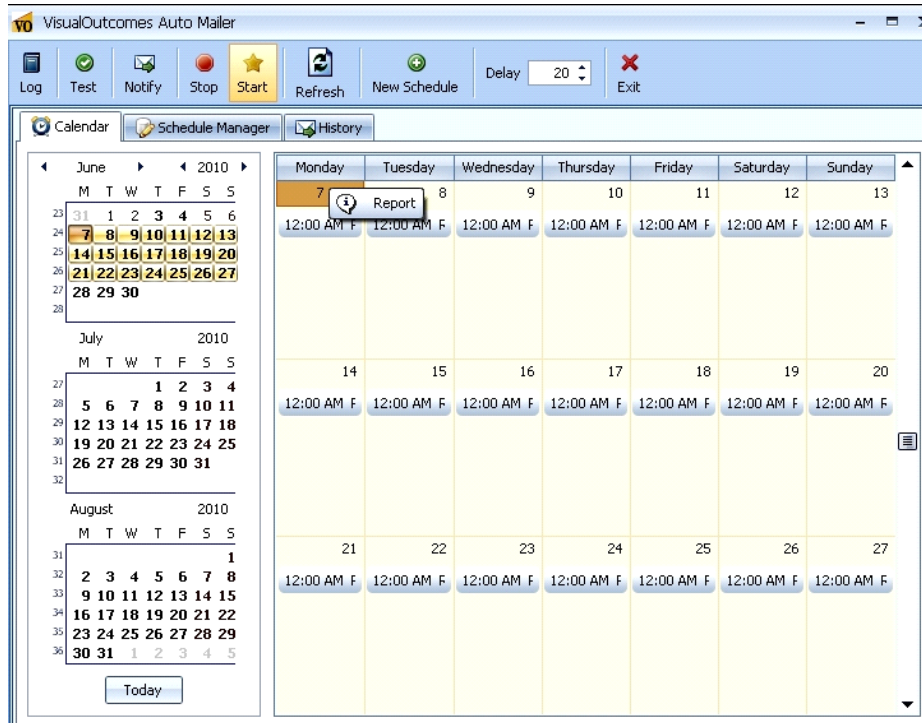
Make sure the Is Active green tick is showing;

- Click the Schedule button to proceed;

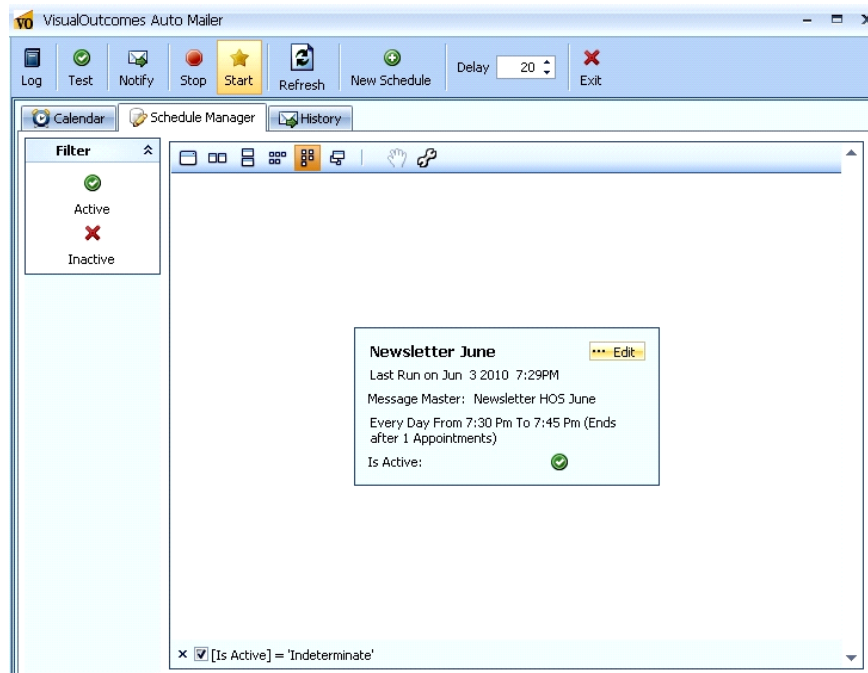
In the Schedule Recurrence window:



- Select the Commencement Time (what time the message is to be sent);
- Select the Recurrence Pattern (how often the message is to be sent);
- Select the Range of Recurrence (the start and end date for the message to be sent);
- Click OK to return to the New Schedule window;
- 'Save' the Schedule. You will now be able to see your message scheduled in the calendar.



- Click on the 'Schedule Manager' tab;

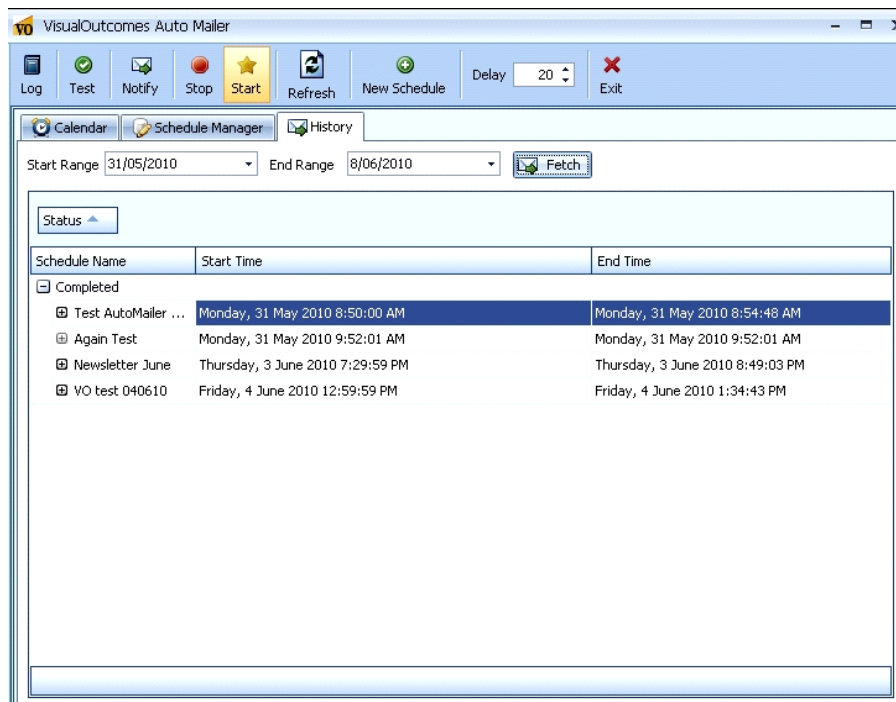


View the Schedule or click on 'Edit' at the end of the row to change the details of a Schedule. This will take you back through the *New Schedule* and *Schedule Recurrence* windows to allow you to make changes. Click 'Save' when changes are completed.

When you are satisfied with your Auto Mailer Schedule, click on the 'Start' button in the top menu to commence your messaging;

- Select the 'History' tab to review all automatic messaging activity;

- Select date range and click on *Fetch* button;



Drill down to see details;

Use the calendar in the Calendar tab on the left to quickly review the scheduled messaging for any given week.

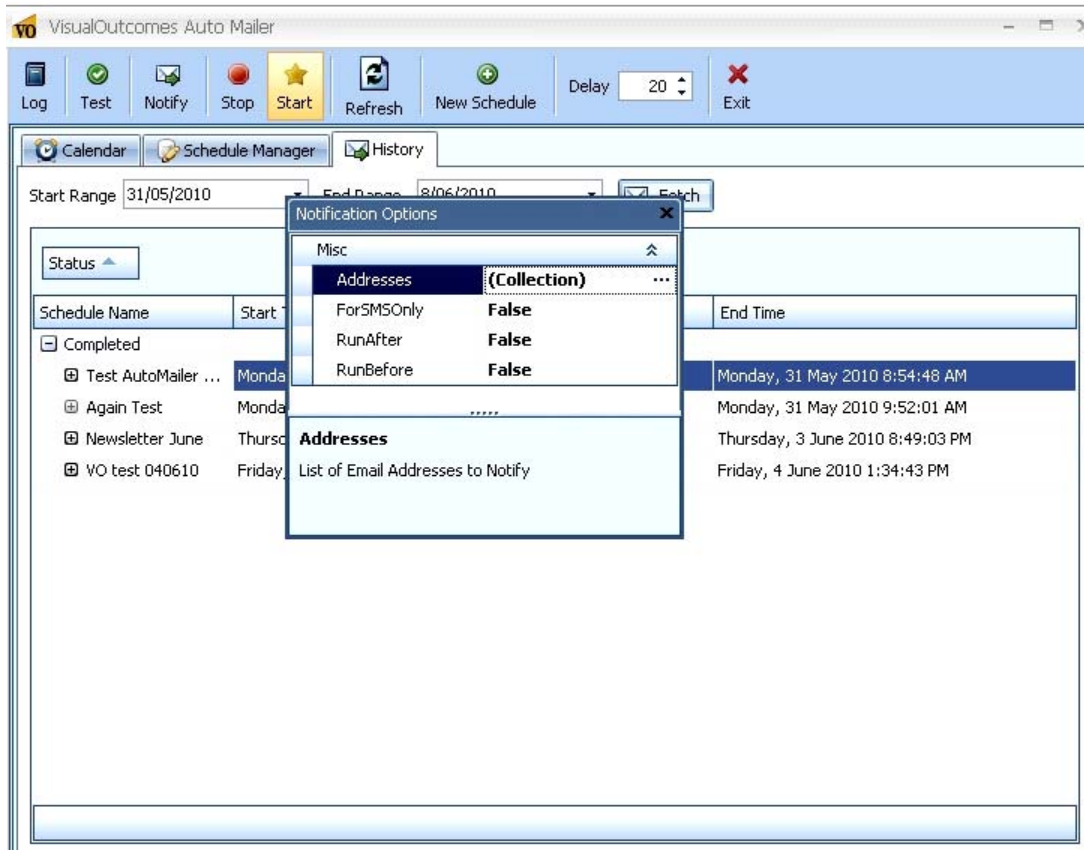
Visual Outcomes Help with Message Master and Auto Mailer

If your message has not been sent successfully, it is important to send this log information to Visual Outcomes to help you identify where in the procedure the problem may have occurred. To do this:

- Select the relevant file from the drop down menu next to “Log File”; the contents of the log file will be displayed;
- Click on the “Send to Support” button at the bottom of the window.

An email containing the log of your message’s progress will be automatically sent to Visual Outcomes for analysis.

To set up Notifications about *Auto Mailer* jobs, use the 'Notify' button on the toolbar:



Set up email addresses where the notification should be sent; indicate if you want notification for SMS only, and set up to running after or before *Auto Mailer* job.

Note: to close *Auto Mailer*, use the 'Exit' button on the toolbar; to leave *Auto Mailer* running in background and ensure job is done, simply close window via 'x' icon on the top right hand corner.

For more information on Troubleshooting with Auto Mailer, please refer to F1 Help or the FAQ feature in Help > Settings of Visual Outcomes.

14. Settings

The Windows OS, Visual Outcomes and each user's VO Settings file

Because settings in Visual Outcomes interact with your Windows setup, it's important to be clear on where Visual Outcomes 'begins and ends' and to ensure your Windows configuration integrates with how you want to use Visual Outcomes.

To briefly review how things work:

- At the foundation of your installation are your computers running the Windows operating system.
- Visual Outcomes operates on Windows.
- Each user must log on to Windows, using either an individual or shared logon, before they can access Visual Outcomes.
- Each person then uses their unique logon user name and unique password to enter Visual Outcomes and be identified while in the application.
- There are two basic ways to set this up. The right choice for your clinic should be discussed with your IT administrator, who will also be responsible for setting up the Windows user environment.

PLEASE NOTE THAT THIS IS NOT A VISUAL OUTCOMES FUNCTION.

1. Individual Windows logins

Each user may be set up as an individual Windows user by your IT administrator (i.e. everyone has their own Windows identity and password). This is set up in Windows.

- This setup also allows each user to customise other aspects of Windows: email, preferences etc.
- If users use more than one computer, they'll need a Windows login for each.
- Once logged in to Windows, they can start Visual Outcomes, using their Visual Outcomes credentials.

In this case each individual Windows user has their own settings in Visual Outcomes on each PC.

The VOSettings.xml file for each user is stored in their (Windows) Local Directory. The path looks like this (in Windows 7 Pro): **C:\Users\YOUR USER**

NAME\AppData\Local\VisualOutcomes\VOSettings.xml

2. Shared Windows login

In this case, several users may share the same Windows login. This may be practical for a PC that's dedicated to a particular role and is used by a variety of people in this role. You can change users faster by logging out and back into Visual Outcomes, rather than having to log out and into Windows as well.

Note that while each user still needs their own Visual Outcomes credentials, if they share a Windows login, they will share the same settings in Visual Outcomes.

Larger sites and universities

For larger sites, in particular, universities, Visual Outcomes can be configured to work with credentials from central directories using LDAP.

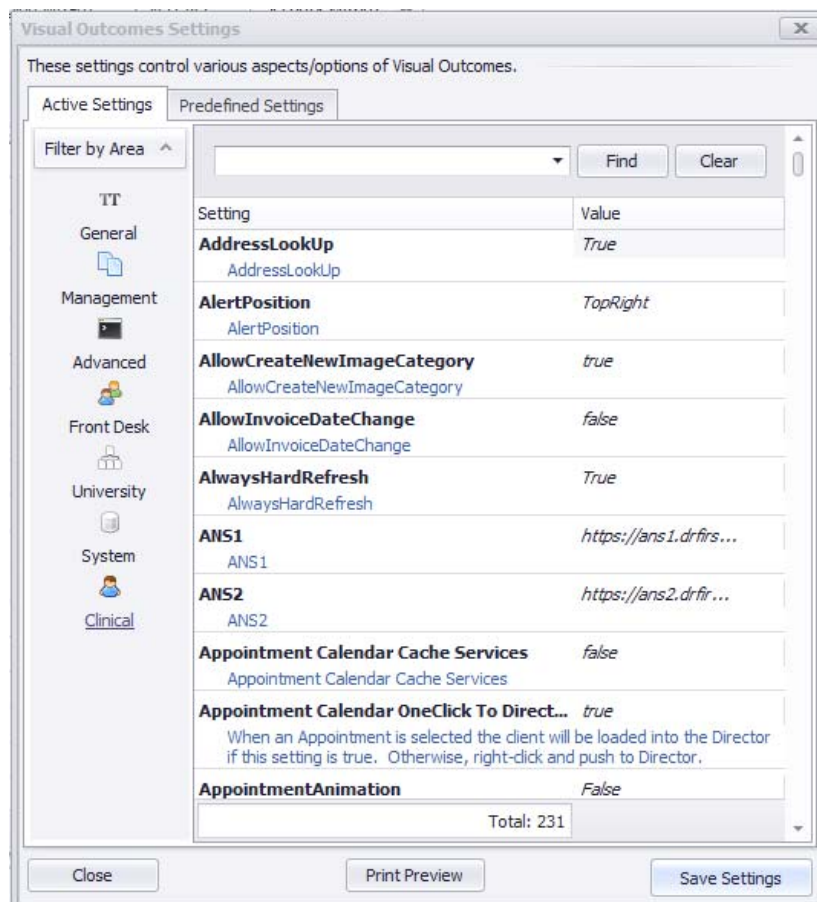
This is always specific to the installation, so details need to be discussed between Visual Outcomes and your IT administrators.

What are Settings?

Visual Outcomes is installed in your practice with a number of settings that control the appearance and functionality of Visual Outcomes.

During the early stages of your Visual Outcomes introduction and the initial configuration and business consultations we strongly recommend that you review all current processes; check thoroughly to know what you want to be delivered with your Visual Outcomes installation.

The change to Visual Outcomes is an opportunity to review and improve the way you run your clinic or clinics and to take advantage of the cultural shift required in the transition to implement changes you know are needed.



There are a large number of settings that are customised to the requirements of your clinic/s, from the operation of clinic tills to the roles of the many people who work in the clinic. The result is a highly configured IT environment that reflects your clinic paradigm of healthcare delivery.

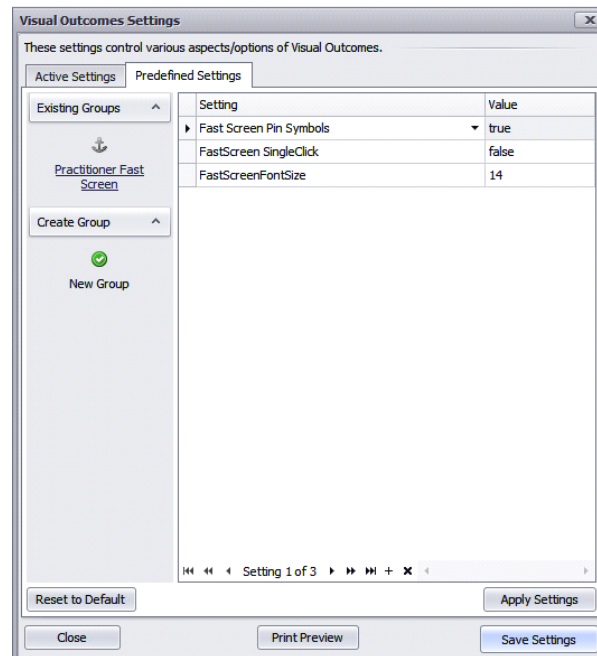
Settings are configured during the installation, implementation and training period. It is the changing the values of these settings will add/subtract/change the functionality of your Visual Outcomes application).

Administrators and CEOs only change the settings.

Predefined Settings (only configurable with CEO security)

Your clinic may be set up with groups of predefined settings; a group of settings that are CEO-configured for a particular role/purpose on each PC.

Predefined settings are set by CEO and are read-only for most users.



When you log on to that PC you may access the settings via help on the top tool bar.

You just select from the groups of predefined settings by name and those settings are applied on that PC.

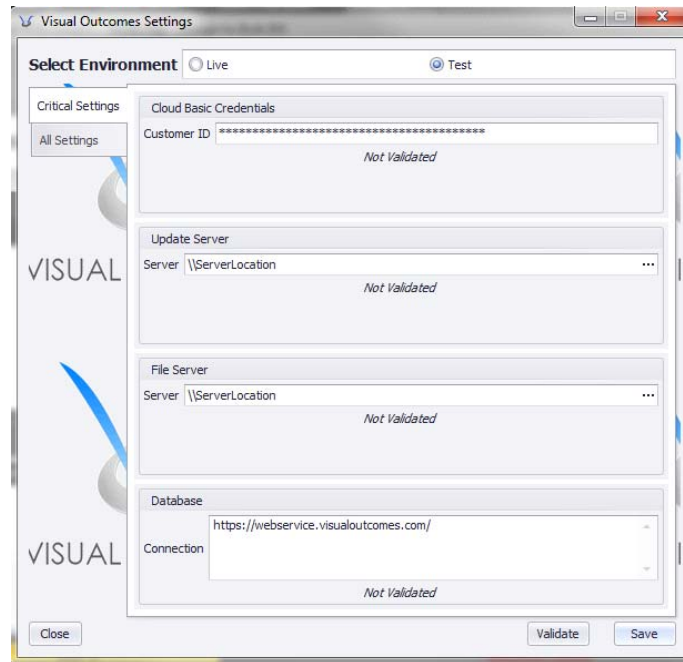
If you log on to that PC again those settings are already saved to the windows operating system and will automatically populate the application next time you log on.

However you need to remember that you must do this on each PC when you use it and it will thereafter recognise your logon and the group of pre-defined settings you selected last time.

Predefined settings are found in the settings file under Help - Settings on the top tool bar. Once selected by you these settings are kept in the C drive local drive/Local directory and are attached to your unique ID every time you log on. The last selected predefined setting you have chosen will apply.

The settings are stored in the VOSettings.xml file applied to your individual Visual Outcomes login, so that each time you exit and re-open Visual Outcomes the correct Settings for your login will open.

Critical Settings



There are 'critical' settings (such as essential connections of the network, file server, database, cloud settings and update server) that are not generally available within Visual Outcomes. They're hidden from the general settings file and are only available in the Setup tool and can only be changed after a password prompt (password only held by CEO/administrator).

Pre-set layouts

When you log on to Visual Outcomes you may select one of the four standard layouts depending on the work or role you have on that day or that computer:

- Front desk
- Practitioner
- Practitioner Rapid
- Management

These layouts are found on *Outcomes at a Glance* when you first log on and are a combination of settings and windows that have been pre-set to focus on that particular role.

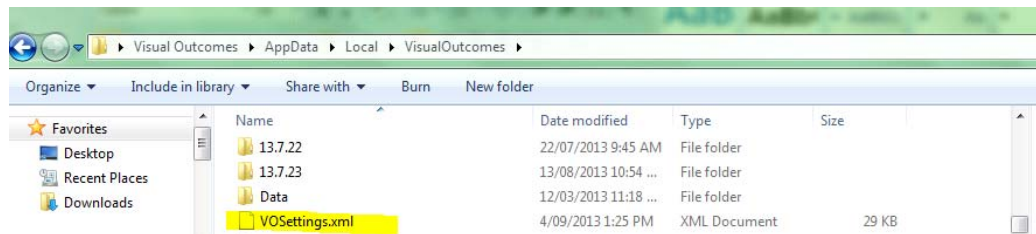


(Also available through top tool bar - File - Layout - select)

Note: Pre-set layouts do not affect the settings. So if you have a set of predefined settings you can move across these pre-set layouts without ever altering any settings on that PC.

VOSettings.xml file.

(Administrators only)



The file **VOSettings.xml** holds your settings. Please do not open or edit the file yourself unless instructed to by Visual Outcomes support. An incorrectly changed Settings file can prevent Visual Outcomes from opening. If your authorisation level allows you to change settings, you must do it from within Visual Outcomes.

Multi-site doctor ("Roaming")

This is a set of properties to cover a doctor or staff member who moves between different physical locations; e.g. a travelling doctor who takes their laptop from clinic to clinic. It will set the till for that clinic and set the updater and file server for easy transition between sites.

Individual shortcuts are created for each clinic so it's simple to login to Visual Outcomes with the settings for that particular location.

Please contact VO Support at helpdesk@visualoutcomes.com for more information

Setting up, changing and saving settings

(Administrators only)

Settings can only be changed by a user with CEO-level security.

There are three ways to setup and save settings for users in Visual Outcomes:

- CEO and administrator of your Visual Outcomes application confer and agree on the global values for all your settings as your default settings. These are set up by Visual Outcomes before you go live. These may be manually adjusted during the configuration and training steps (settings across your application to reflect your practice needs).
Centralised settings that are applied universally across all users on log on.
In VO Varsity (larger enterprises and university teaching clinics), these centralised settings allow control of the use of Visual Outcomes with a centralised default set of settings.
- CEO-level administrators can changes settings in your Visual Outcomes application. Please note that we recommend you discuss this with Visual Outcomes and advise us of any changes so our Help Desk team has an accurate record of your setup.
- CEO sets up Predefined Settings.

CEO changes Settings in Visual Outcomes – Setup

(Administrators only)

These must be agreed between your CEO /administrator and Visual Outcomes' help desk.

The Help Desk must be given a record of any significant changes for reference. If we don't know your setup, we can't support you!

Settings change for a unique identified user of your application

Record any changes you have made as CEO/administrator in your in-house manual for reference.

How to change user-specific settings

When any user is logged on, the CEO can log on and change *that user's* settings.

Settings can't be changed by anyone except CEO or an administrator with CEO rights.

This is only recommended for changing settings on a few PCs. It involves the following:

- User logs into Windows
- CEO goes to Start – All Programs – Visual Outcomes – Administrators – Setup
- Enter password: vOs3zN0 (first is cap "O", second number zero)
- Select Environment – Live
- Select All Settings tab
- Click in the Setting header to arrange in alphabetical order if necessary
- Find the settings that need changing – change the value – Save and Close
- The new Settings are saved to the VOSettings.xml file for this Windows user
- Go to Data – Refresh Entire Data Cache OR
- Close Visual Outcomes and re-open
- Check/test settings are as expected for user
- The user may now log into Visual outcomes with new settings applied.

Changes to settings across the network

Record any changes you have made as CEO/administrator in your in-house manual for reference.

Visual Outcomes recommends that all administration changes, including changes to settings across the network/ PCs are done at the end of the day. EVERYONE MUST EXIT VISUAL OUTCOMES EVERY NIGHT.

All changes are propagated across your application in the local cache of each PC overnight.

All changes are applied when Visual Outcomes is re-opened.

CEO sets up Predefined Settings

This is the method recommended for making changes to settings across all users/groups in the practice. Predefined Settings allow CEO security level users to create custom settings groups to accommodate the need for different functional roles in a practice or different Visual Outcomes features to be used on particular local PCs.

Examples of when Predefined Settings might be useful:

- Multiple locations
- To include DefaultClinic, TillName settings
- Specific PC/VO functionality, e.g. Front Desk PC with HICAPS terminal attached.
- To add to/change a group of role specific settings e.g. practitioner, front desk, administrator

Ease of operations across the practice with Predefined Settings

CEO can make changes to the set of Predefined Settings group on one PC and each user can apply their role with the selection of Predefined Settings after they have logged on to Visual Outcomes

NB there is no need for the CEO to manually adjust the settings for each user on each PC

To create a new Predefined Settings group:

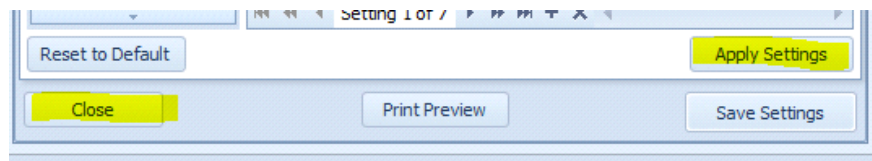
- CEO log into Windows, then log into Visual Outcomes
- Go to Help Settings – Predefined Settings tab
- Under the Create Group header on the left, select New Group
- Enter a name for the Group e.g. Front Desk
- To add settings to the group, click the “+” at the bottom of the window, drop down the settings list menu and select the setting to add
- Define its value in the value column
- Continue to add settings to the group in this way until complete then click Save Settings and close the window
- Go to Data – Refresh Entire Data Cache



<http://visualoutcomes.com/index.php/home-secure/documentation/training/training-videos-part-6/>

Applying Predefined Settings to a user’s Visual Outcomes:

- User logs into Windows, logs into Visual Outcomes
- Go to Help – Settings – Predefined Settings tab
- Find the settings Group on the left and click to display the settings in the group
- Click on the Apply Settings button
- Click on the Close button (**do not** close the window with the ‘x’)



The new settings will be saved to their local VOSettings.xml file upon exiting Visual Outcomes
Restart Visual Outcomes and the settings will be applied.



<http://visualoutcomes.com/index.php/home-secure/documentation/training/training-videos-part-6/>

To make changes to an existing Predefined Settings group:

- CEO log into Windows, log into Visual Outcomes
- Go to Help Settings – Predefined Settings tab
- Select the Group where changes need to be made
- To add settings to the group, click the “+” at the bottom of the window, drop down the settings list menu and select the setting to add
- To delete a setting from the group, select the setting by clicking in the box left of the setting name (an arrow will appear), click the “x” at the bottom of the window to delete
- To change the value of a setting, click in the value field and type in the new value
- When all changes have been made, click Save Settings and close the window
- Go to Data – Refresh Entire Data Cache

Record any changes you have made as CEO/administrator in your in-house manual for reference.

Advise appropriate users of changes to Predefined Settings.

Ask these users to reapply the Predefined Settings group on their next log on for each PC they use.