

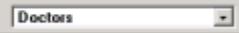


How to Setup a Book Owner in Appointments

Below is a summary of how to setup a new book owner, for more information, please refer to the on-screen help.

1. Select **Maintenance - Book Owners**.
2. Click **Add Staff** to add a member of staff or **Add Clinic** to add a generic clinic eg the user has not been setup in Control Panel.
 - If you choose Add Staff you must highlight the member of staff on the list, choose the number of weeks ahead and click **OK**.
 - If you choose Add Clinic you should enter a description and an alias and choose the number of weeks ahead. Click **OK**.
3. You now need to setup a plan, similar to a rota for the new book owner. Select the **Personal Plan**  icon and choose the book owner from the list.

 **Note** – If the Personal Plan icon is not available, close the reception or book view.

4. Bring up a list of sessions using the Show Session list  icon.
5. Drag and drop the sessions onto the Personal Plan. Repeat this until the plan is made up for the new Book Owner. Click **OK** to save the changes.
6. To make the books up, you need to click on **Books - Extend Books** and highlight the new book owner and select **Extend**.
7. To add a column for the new book owner click the Reception View  icon.
8. Select the view you want to add the new book owner to eg Doctors View .
9. The new column will go to the right of the column you are clicked in. Choose **Views - Add Column**.
10. The column heading states **None**. To add the new book owner right click on the heading "**None**" and choose the book owner from the list. Click **View** from the menu and choose **Save**.

 **Note** - Any alterations to the Reception view do not take effect for other users until they log out of Appointments.

Inactivating a Book Owner

1. If a member of the practice leaves and is made inactive in **Control Panel - File Maintenance**, you will see the following warning message in Appointments if they are a book owner.



Inactive Book Owner

2. To inactivate, select **Maintenance - Book Owners**.
3. Double click on the book owner which automatically inactivates the book.
4. Click **Close** to come out of the Book Owners window.