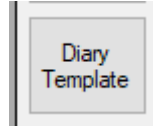


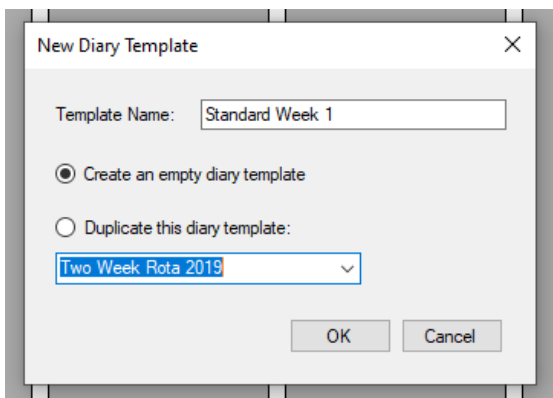
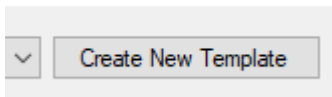
To access the diary templates, firstly open the appointment diary.



Then click on the diary template button.

## Creating a new template

To create a new template, click on create new template button.



Enter a name for the template.

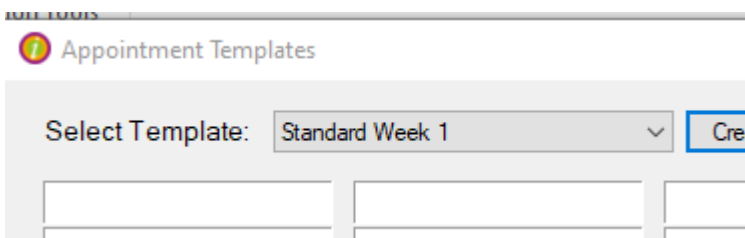
*The module is designed to allow you to create only a single week template. If you have a rota that is longer than a week e.g. a two-week rota, complete the creation process twice and name the template accordingly. There is no limit to the number of templates that can be created.*

Ensure the default option 'Create an empty diary template' is selected.

*To duplicate an existing template to edit, select the option 'duplicate the diary template' then select the template you would like to duplicate from the drop down.*

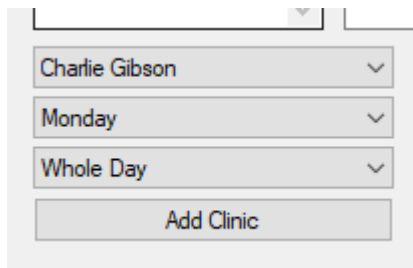
Click ok.

The name of the template will now be displayed at the top.



## Adding Clinics to the template

Using the fields in the bottom left-hand corner of the screen;



A screenshot of a form with three dropdown menus and one button. The first dropdown menu is labeled 'Charlie Gibson' with a downward arrow. The second dropdown menu is labeled 'Monday' with a downward arrow. The third dropdown menu is labeled 'Whole Day' with a downward arrow. Below these is a button labeled 'Add Clinic'.

Firstly, select the member of staff you would like to add a clinic to the template for.

Then select the day of the week this clinic will be.

Select if it is a whole day clinic or an AM or PM clinic.

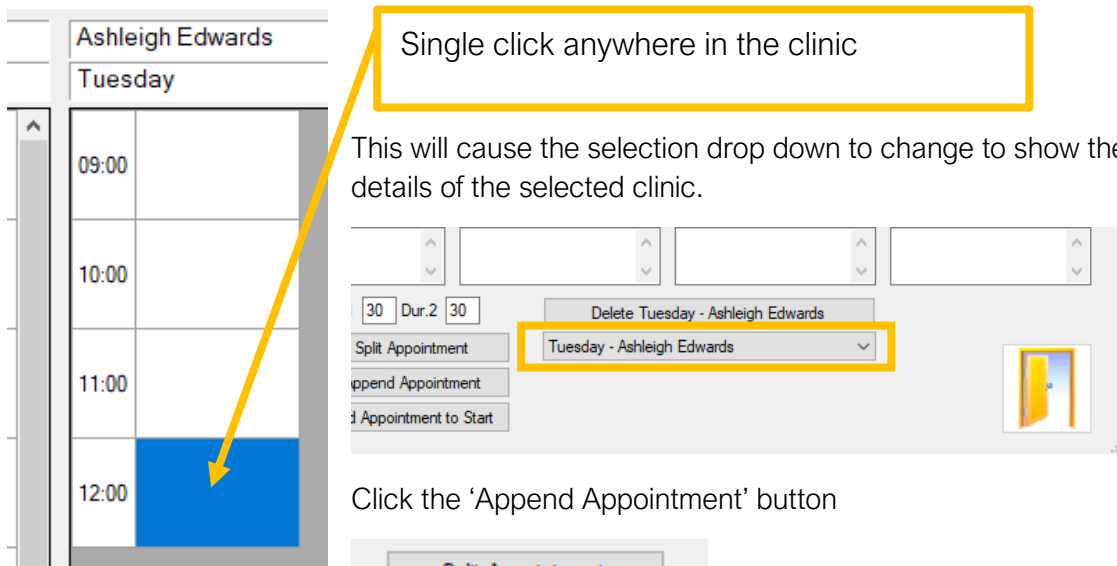
Click Add Clinic.

Continue this process for all the days of the week and clinicians as required.

## Editing the clinics on the template

To add an appointment to the start of a clinic

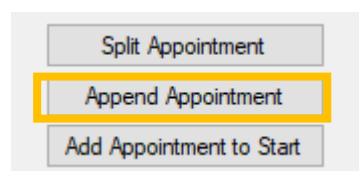
Single click in the clinic you would like to add an appointment to the end of.



A screenshot of a clinic template for Ashleigh Edwards on Tuesday. The time slots are 09:00, 10:00, 11:00, and 12:00. The 12:00 slot is highlighted in blue. A yellow box highlights the text 'Single click anywhere in the clinic' with an arrow pointing to the highlighted slot. Below the calendar is a control panel with buttons for 'Split Appointment', 'Append Appointment', and 'Add Appointment to Start'. A dropdown menu shows 'Tuesday - Ashleigh Edwards' selected. A 'Delete Tuesday - Ashleigh Edwards' button is also visible.

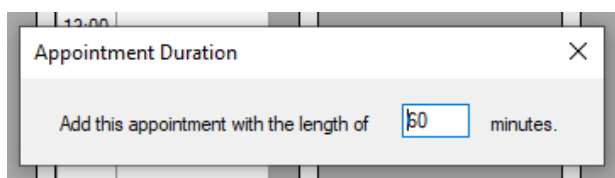
This will cause the selection drop down to change to show the details of the selected clinic.

Click the 'Append Appointment' button



A screenshot of the appointment control panel with three buttons: 'Split Appointment', 'Append Appointment', and 'Add Appointment to Start'. The 'Append Appointment' button is highlighted in yellow.

This will open an appointment duration window. (The default appointment length of the clinic will be displayed).



A screenshot of a dialog box titled 'Appointment Duration'. It contains the text 'Add this appointment with the length of' followed by a text input field containing '30' and the word 'minutes.'.

If the appointment duration shown is the length of the appointment you would like to add then click the enter button on your keyboard.

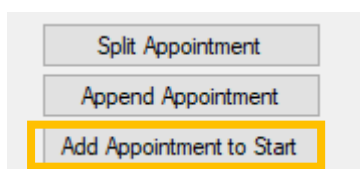
If it is not, change the duration of the appointment first and then click the enter button on your keyboard.

This will enter an appointment to the end of the clinic.

### To add an appointment to the end of the clinic

Single click in the clinic you would like to add an appointment to the start of.

Click the 'Add Appointment to Start' button.



This will open an appointment duration window. (The default appointment length of the clinic will be displayed).

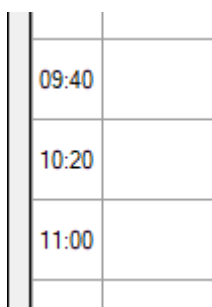
If the appointment duration shown is the length of the appointment you would like to add then click the enter button on your keyboard.

If it is not, change the duration of the appointment first and then click the enter button on your keyboard.

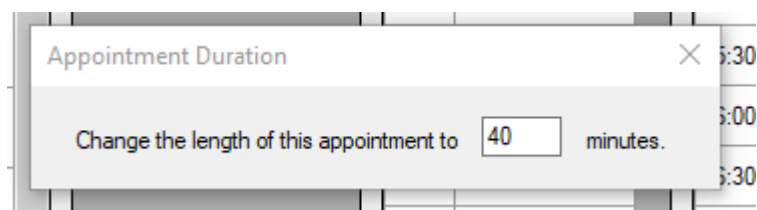
This will enter an appointment to the start of the clinic.

### Adjusting appointment length

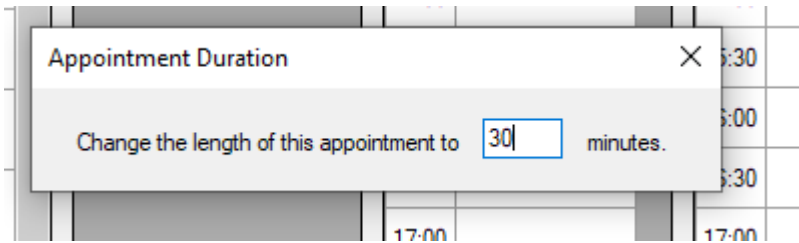
If you would like to make an appointment slot shorter or longer, double click in the time box for that appointment.



This will open an appointment duration window, displaying the current duration of the appointment.

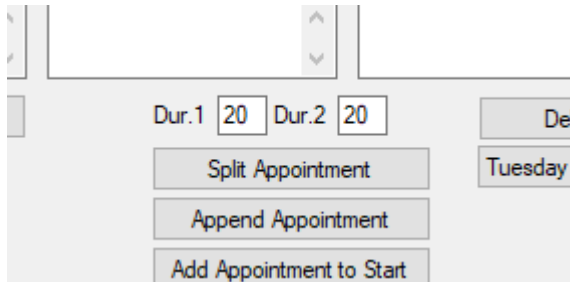


Overtyping the current appointment length with the desired appointment slot length.



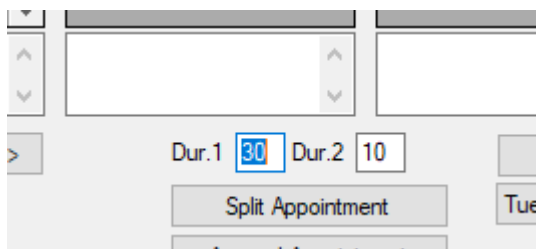
Then press enter on the keyboard.

You can also split appointment slots in to two appointments.



Select the appointment you would like to split by clicking on it once.

Enter the duration of the first appointment slot length that you would like to split the long appointment in to.



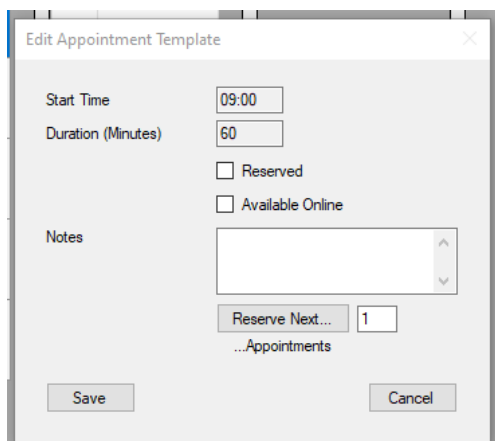
The duration of the second appointment slot that is going to be created will be automatically populated.

Click split appointment.

## Reserving appointments

To reserve an appointment in the template, double click on the appointment you would like to reserve.

This will open an 'Edit Appointment Template'



Tick the reserved box.

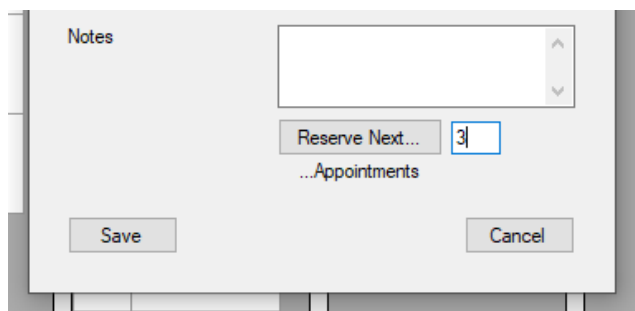
If applicable enter a reason for the reserve.

Click Save.

If you would like to reserve more than one appointment in a row you can use the reserve next button.

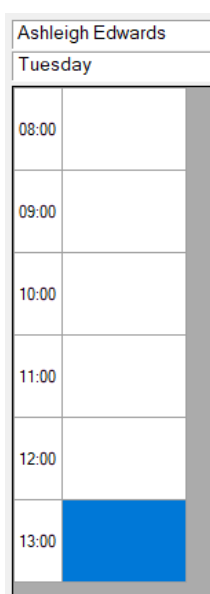
Type the reason for the reserve in the notes.

Enter the number of appointments you would like to reserve into the field after the 'Reserve Next' button.



Click the 'Reserve Next' button.

### Removing appointments from the end of the clinic



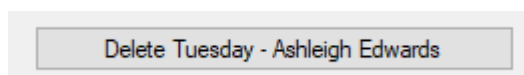
To remove an appointment from the end of a clinic, single click in the appointment at the end of the clinic you would like to delete.

Then press delete on the keyboard.

### Deleting a clinic from the template

Single click anywhere in the clinic you would like to delete from the template.

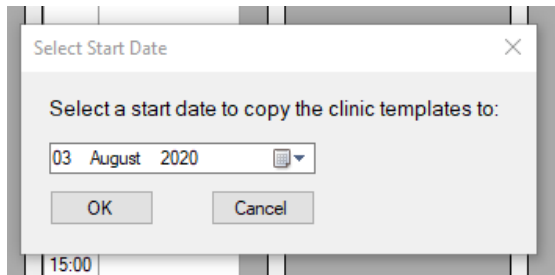
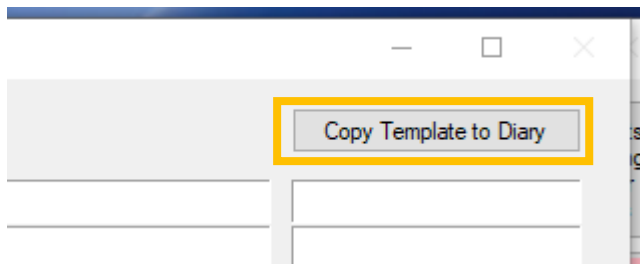
This will change the 'Delete' button to show the details of the selected clinic.



Click the delete button.

## Copying a template to the main diary

To copy the template to the clinic, click the button in the top right-hand corner.



Select a start date for the week you would like to copy the template to.

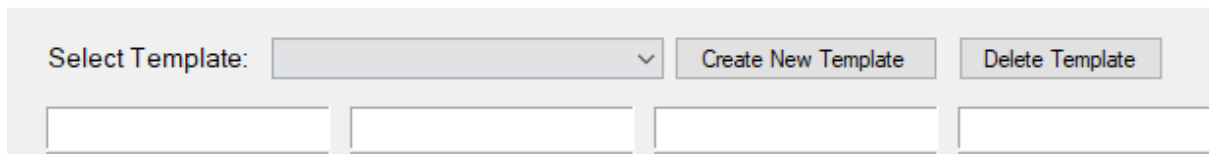
Then click ok.

Repeat for any following weeks required.

## Selecting an existing Clinic so it can be edited or copied to clinic

To select an existing template to edit or copy to the diary, click on the drop-down arrow for the select template field.

### Appointment Templates



Selecting the template from the list will populate the form with the clinics in that template, and then display the name of the selected template at the top of the form.

