datacon
DENTAL SYSTEMS

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Schedule Views

Introduction

The Scheduling Views tool is especially helpful for offices that have multiple doctors and use different books for the hygienists. Scheduling Views allows for the creation of up to 32 custom views.

The Scheduling Views tool allows you to define the columns that display for individual users, groups of users, or for the entire practice. For example, your office has three hygienists and they each want to see only their schedule column along with the doctor's columns for coordinating prophy and exam appointments.

Set up Custom Schedule Views
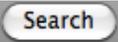
- From the *Main Menu*, click [Search] and type in "customize schedule views".
- Click **Customize schedule views**. The *Schedule view descriptions* screen will open.
- Click the first occurrence of **View not being used** in the left column. The *Schedule view setup* screen will open.
- Type the description for the new view and the number of columns to display.
- Click the drop-down menu for **Unit size:** and click the unit size to display in the new view.
- In the **Weekday** column, click **Any day**.
  - o This means this display will show any day of the week. For example, if you want any day to show the same as Monday, Tuesday, and Wednesday or any other day, then you don't have to set up the individual days. If you want Monday to display differently than Tuesday or Friday, then you can have a custom view that is different for each day.
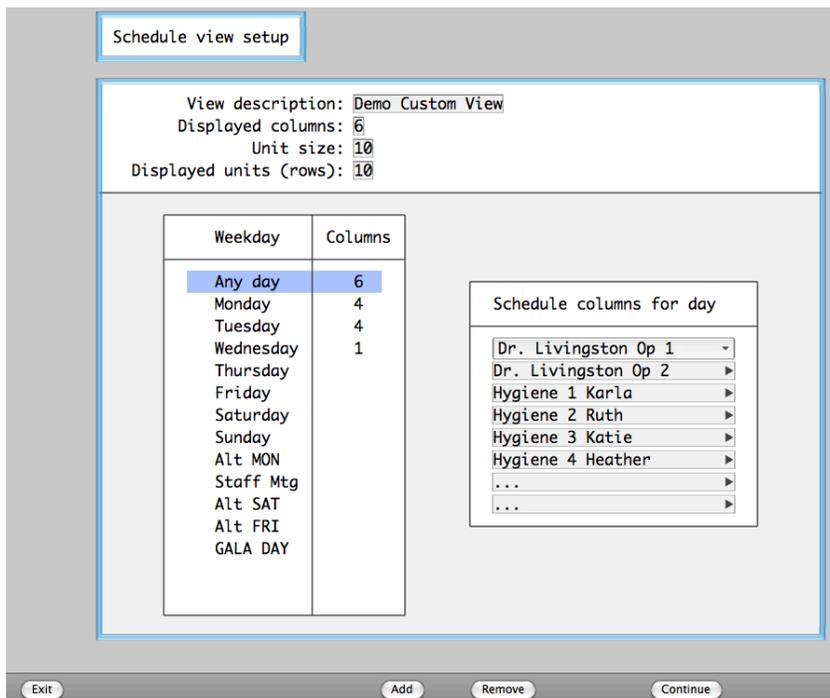
In this example, we want **Any day** to show Dr. Livingston Op 1 and Dr. Livingston Op 2, plus the columns Hygiene 1, 2, 3, and 4.

We have exceptions on Mondays, Tuesdays, and Wednesdays, when we have fewer producers working and we don't need to see all the empty columns.

Attach a Custom Schedule View to a User

Once you have defined your custom schedule view(s), you need to attach the custom schedule view to the user who needs it. You do not need to specify a schedule view for users who want to continue to view the standard schedule view. Attaching a schedule view to a user requires the privilege to access the user file.

- From the *Main Menu*, click **Users** and then click the name of the user you want to specify a custom schedule view for. The *User Details* screen will open for that user.
- Click the drop-down list for **Schedule View**. The list of schedule views will appear.
- Click the description of the schedule view for this user. To return the user to the standard schedule view, click **Normal**.
- The next time this user logs in and views the schedule, the new schedule view will display.

The custom view can be attached to a user in **Users** off the *Main Menu*. You can also set up a custom user menu for the schedule view.

Questions? Contact the staff at Datacon for help.
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