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Adding a user to a session holder filter

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A session holder filter lists groups of users who hold appointment sessions. Use session holder filters to quickly filter those appointments you want to see on the Appointment Book. For example, create a filter for all clinicians (including any locums) or all nurses. When you select that session holder filter in the Appointment Book, your view is filtered for the selected group of session holders.

Once you have created your organisation session holder filters (Appointments Configuration > Organisation options > Session Holder Filters), follow these steps to add further users to them:

A session holder can be added to more than one filter if required.

When creating a new user in Organisation Configuration, you can select their session holder filters at this time.

1. Access Appointments Configuration.
Click (ems), point to **Appointments**, select **Appointment Book** and then on the ribbon, click **Appts Config**.
The Appointments Configuration screen is displayed.
2. In the left-hand pane, click **Session Holder Filters**.
3. On the Current Filters screen, select the required filter, and then click **Edit**.
4. On the Organisation Filter screen, click 🔍 and select a user.

Use ⬆ and ⬇ to change the order of the session holder list. This determines the order in which the session holders/lists are displayed on the Appointment Book per session holder filter (reading left to right).

5. Click **OK** twice to save.
The user(s) you selected will now be added to the session holder filter, and their sessions will now appear in the Appointment Book when you select the appropriate filter.

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