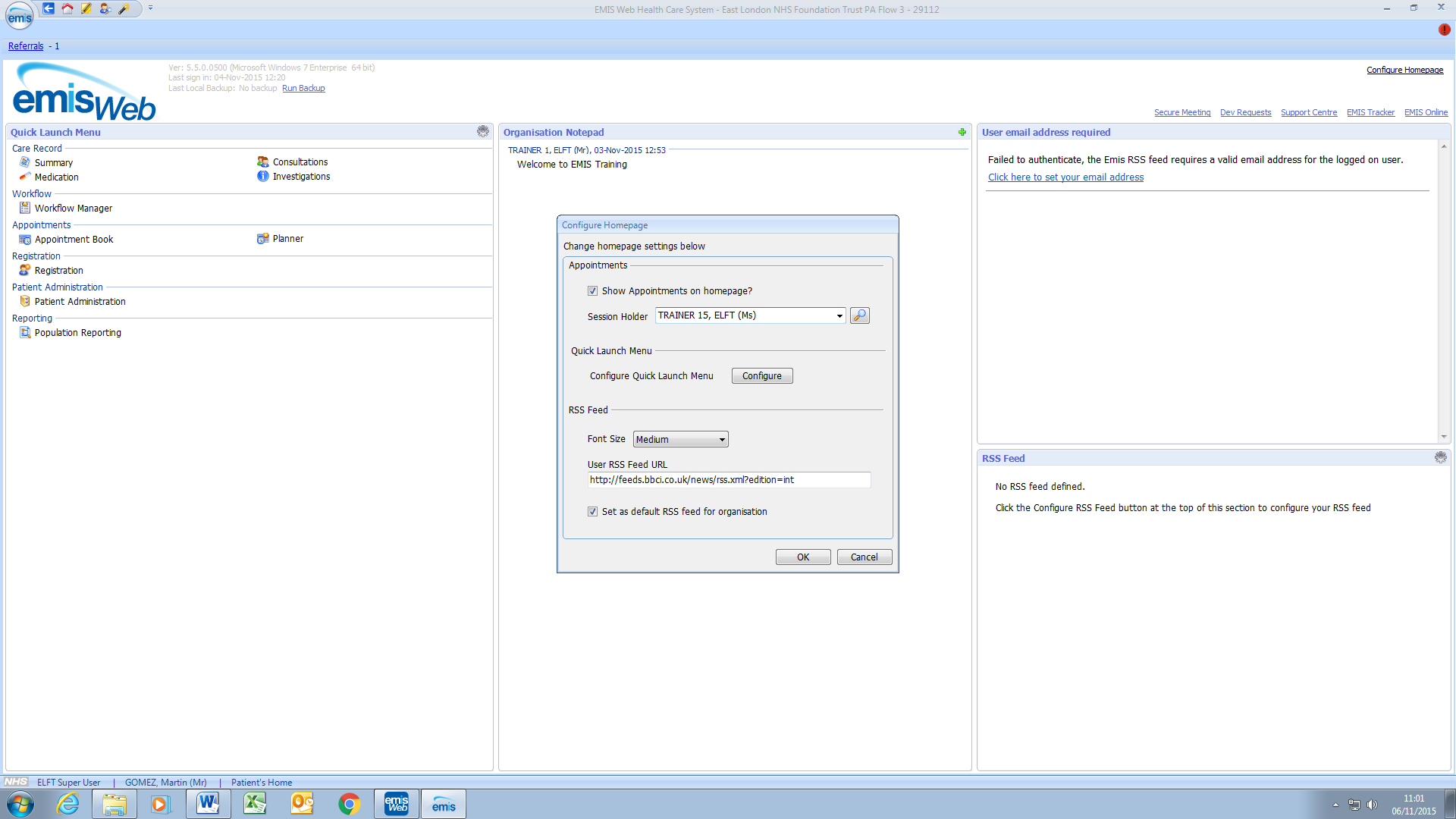
**EMIS – User Configuration**

**Purpose**

This document enables users to personalise the EMIS Home Page and other configurable features

**Configuring the Homepage link**

Click on the **Configure Homepage** link (top right) will open the Configure Homepage window

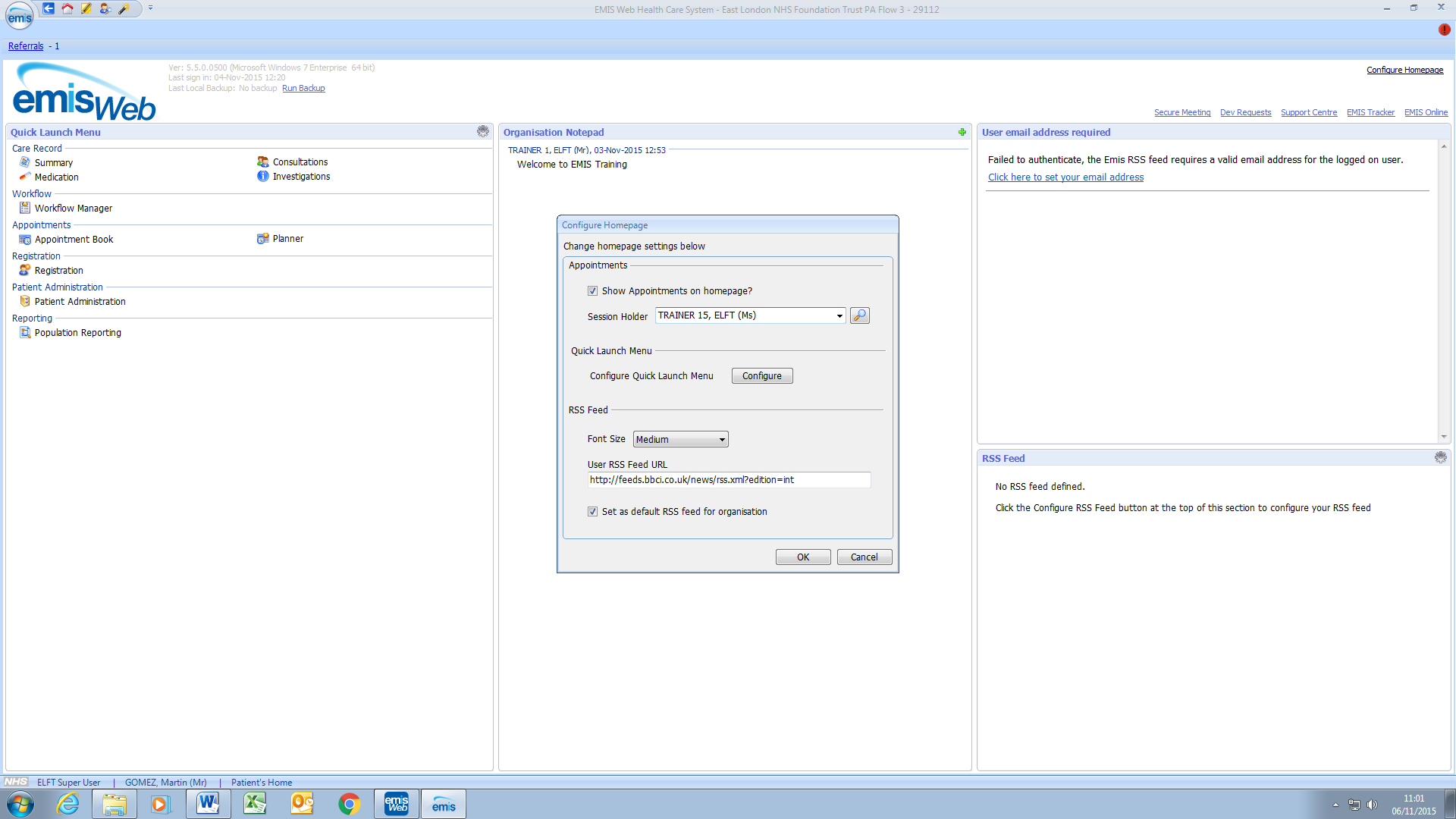


**Show Appointments on Home Page**

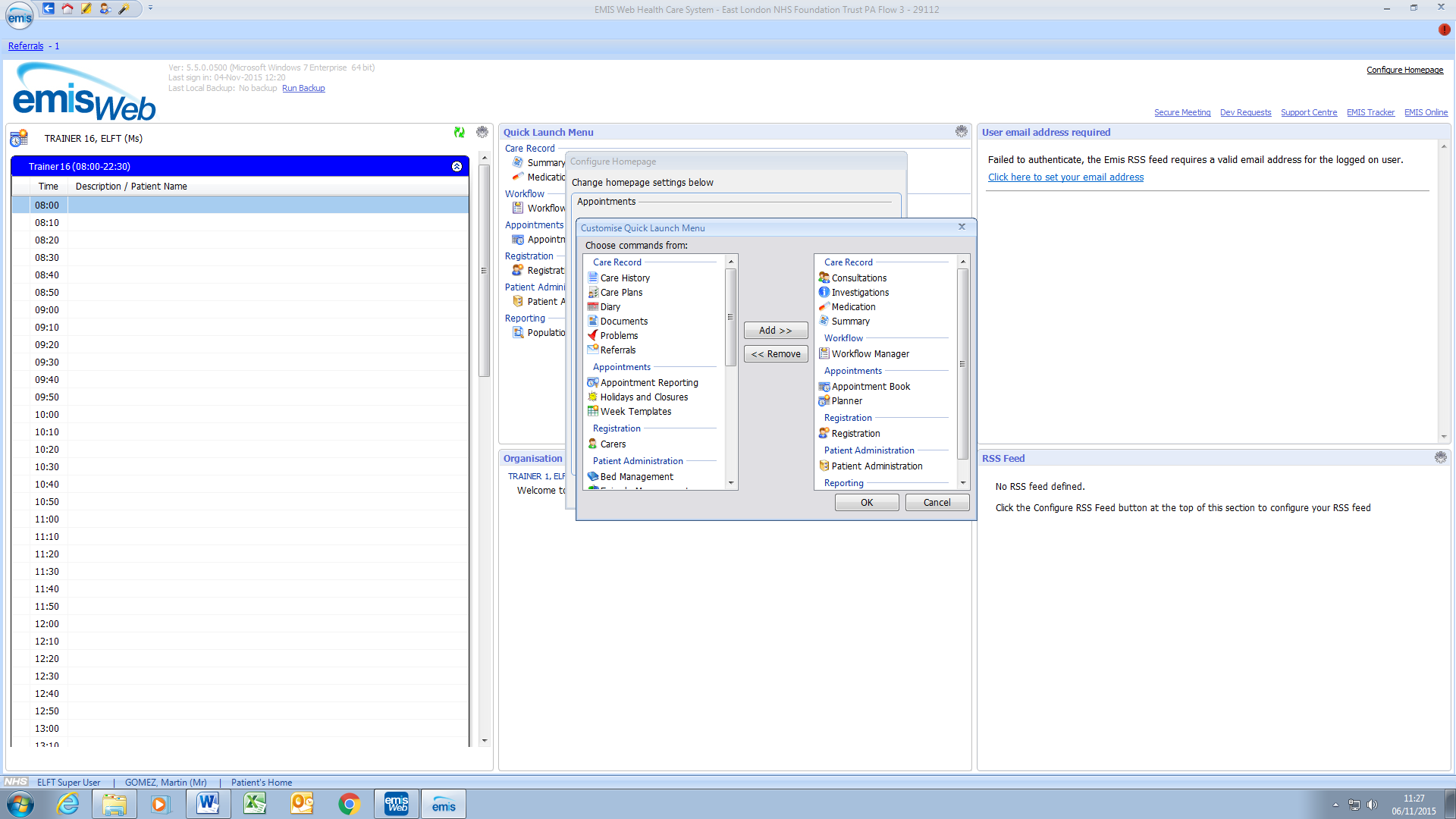
Tick the ‘**Show Appointments on Homepage?**’ – click the magnifier and search for the user’s name from the list and click **OK.**

**Configure Quick Launch Menu**

Click the ‘Configure’ button



The ‘Customise Quick Launch Menu’ window is open.



The existing config will be similar to the below:

Care Record

Consultations

Documents

Investigations

Medication

Summary

Workflow Manager

Appointments

Appointment Book

Registration

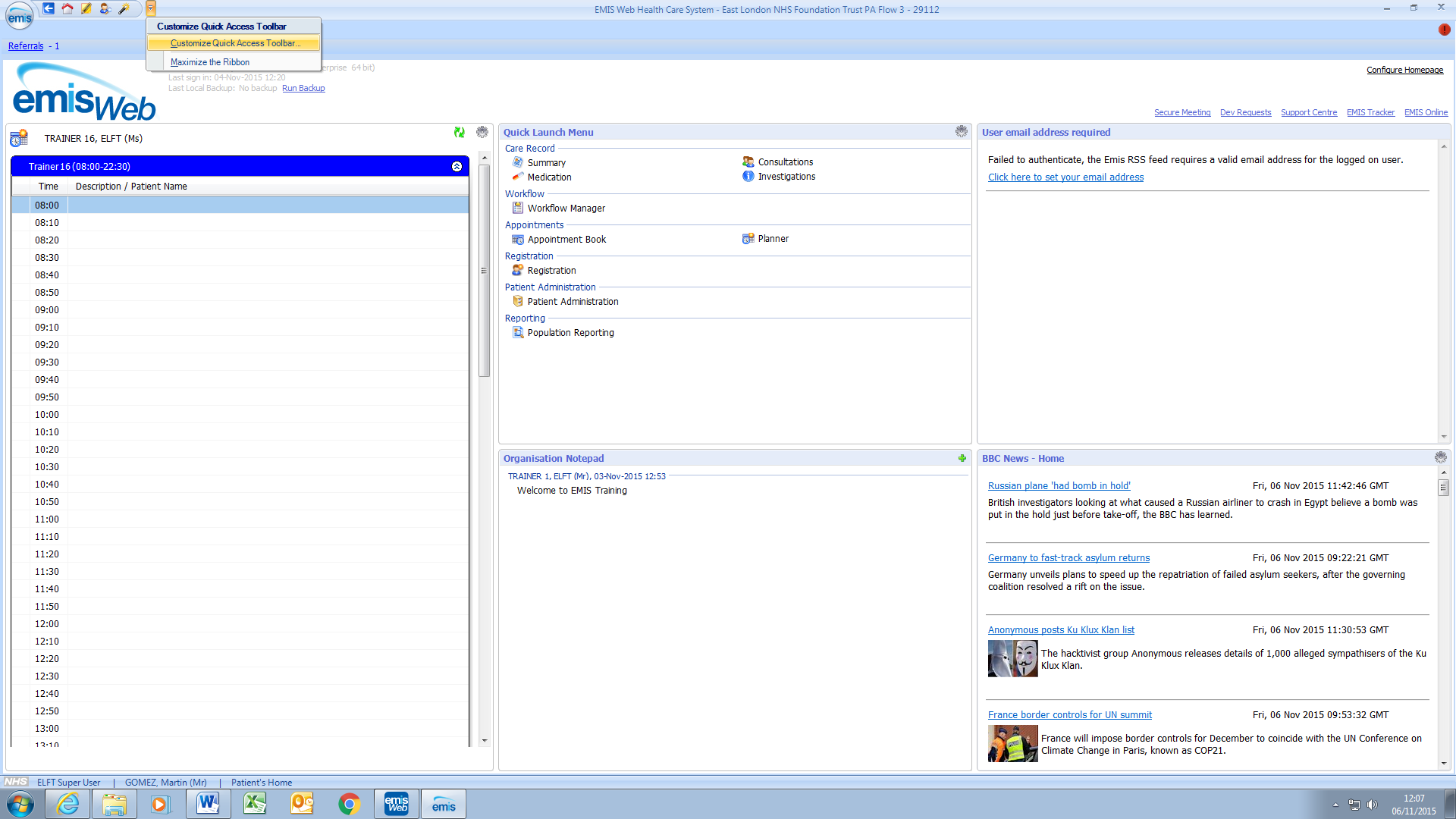
Registration

Patient Administration

Patient Administration

**Customize the Quick Access Toolbar**

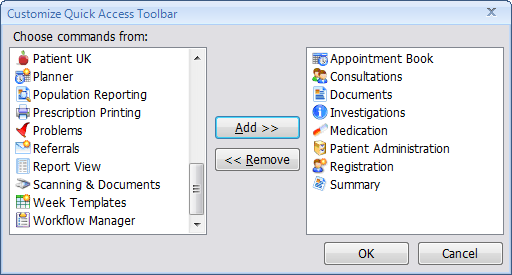
Click the ‘**Customize Quick Access Toolbar’** dropdown button and select ‘**Customize Quick Access Toolbar.’**



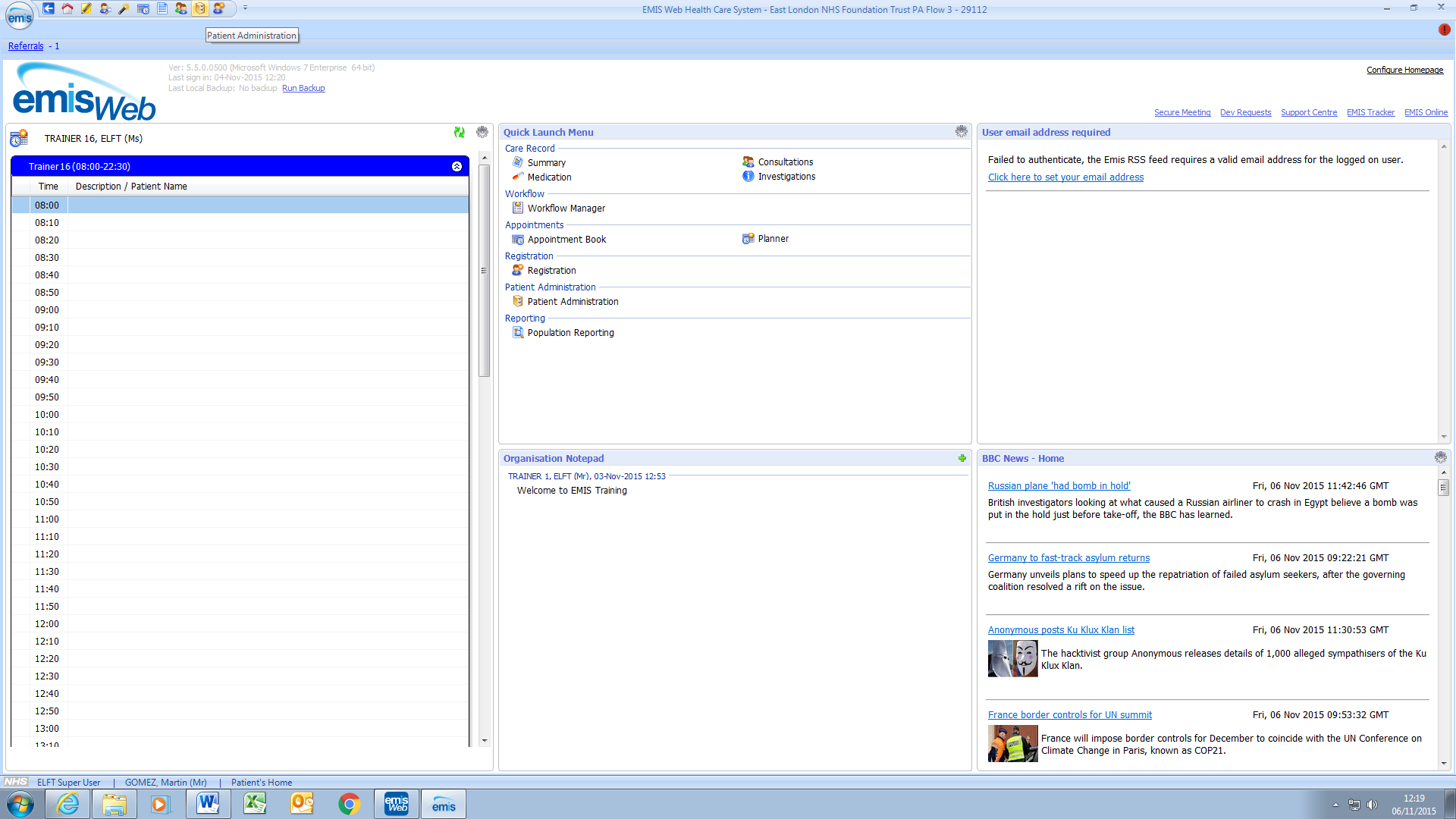
On the ‘**Customize Quick Access Toolbar’** window select required icons from the left pane such as:

* Appointment Book
* Consultations
* Documents
* Investigations
* Medication
* Patient Administration (NOT Patient Administration Manager!)
* Registration
* Summary
* Workflow Manager
* Scanning & Documents

Click ‘**Add>>**’ to move to the right pane, and click ok.

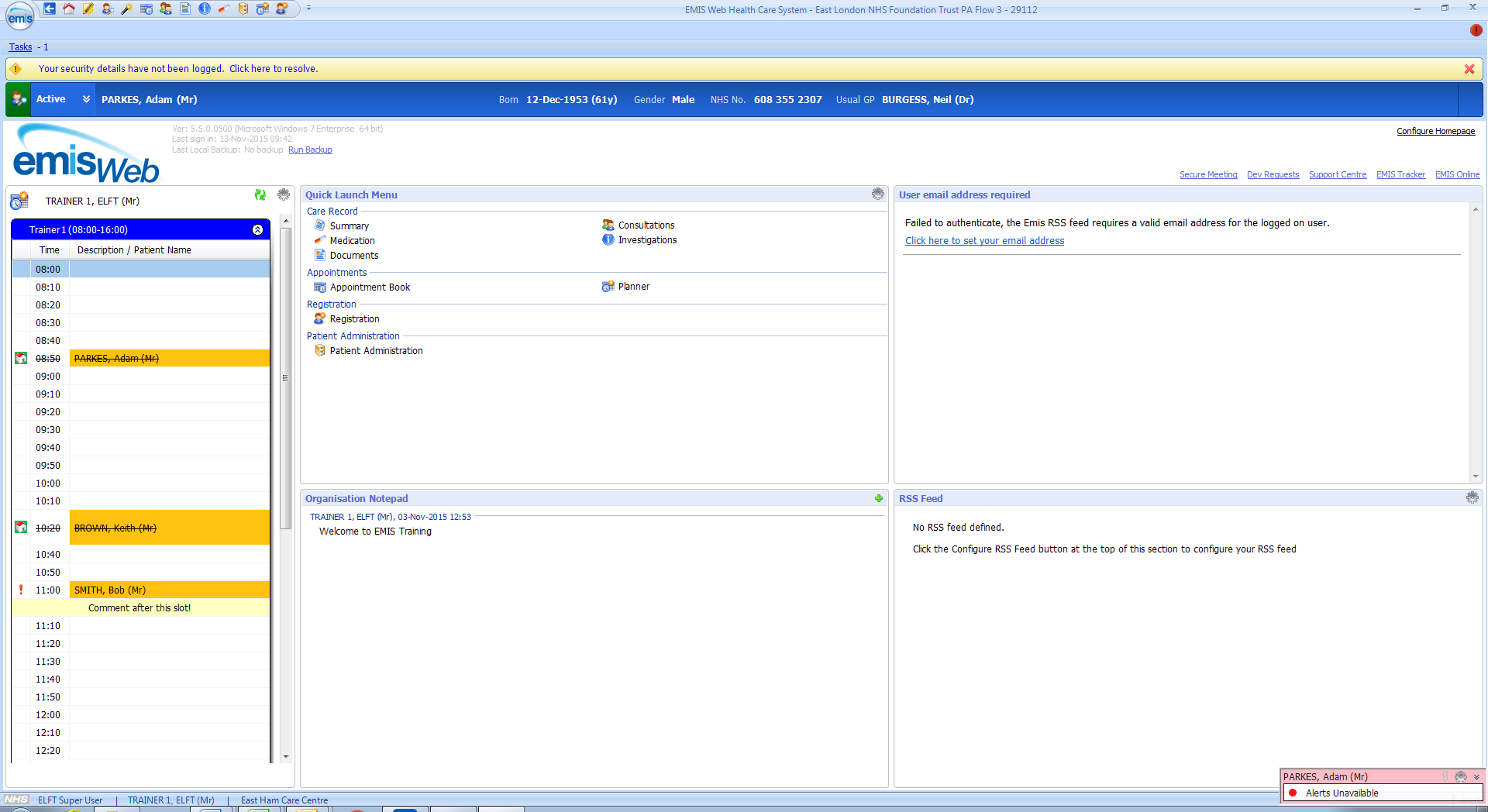


The selected icons will appear on the Quick Access toolbar.

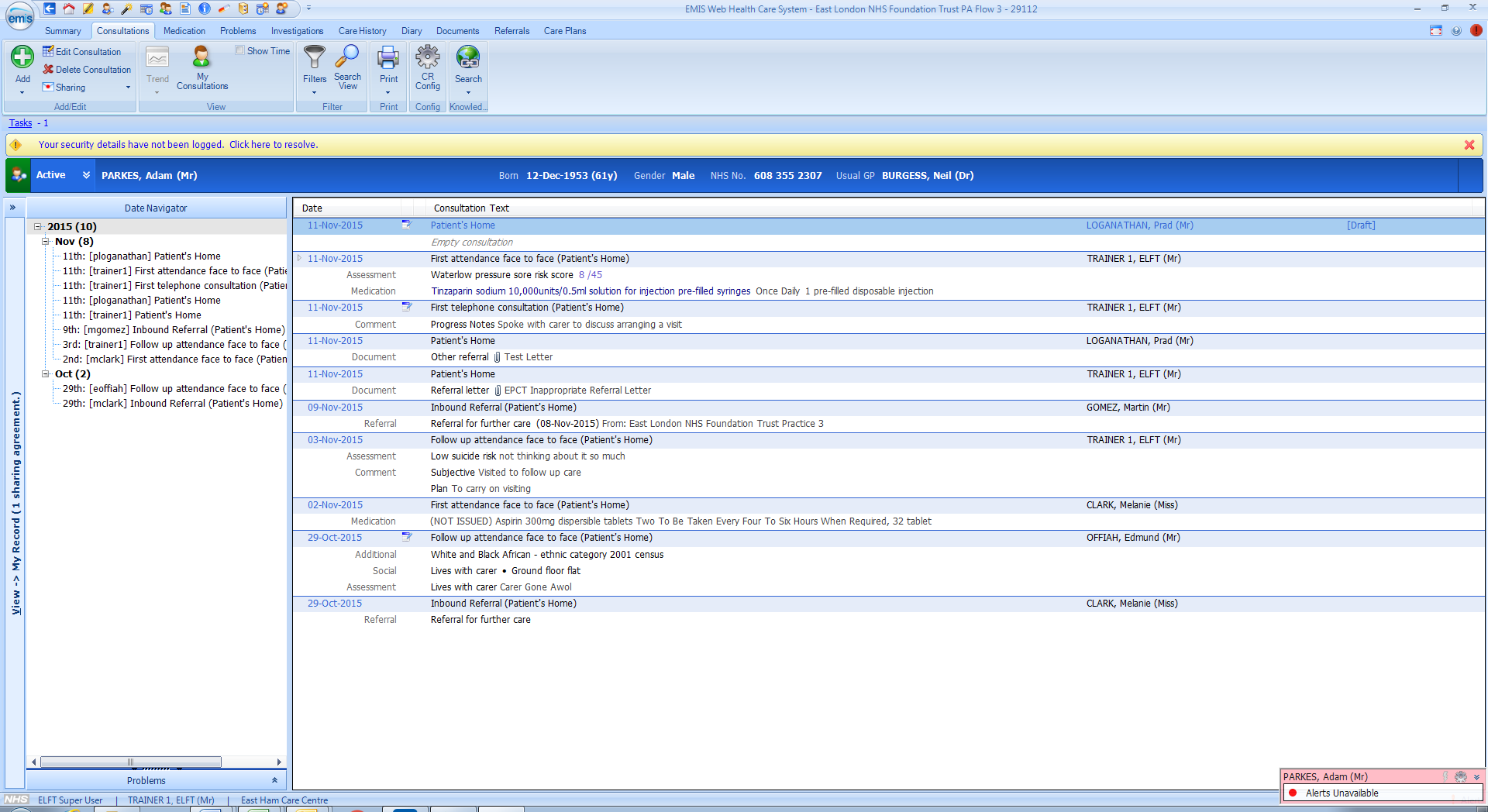


**Configuring Users Consultation:**

Click on **Consultations**:

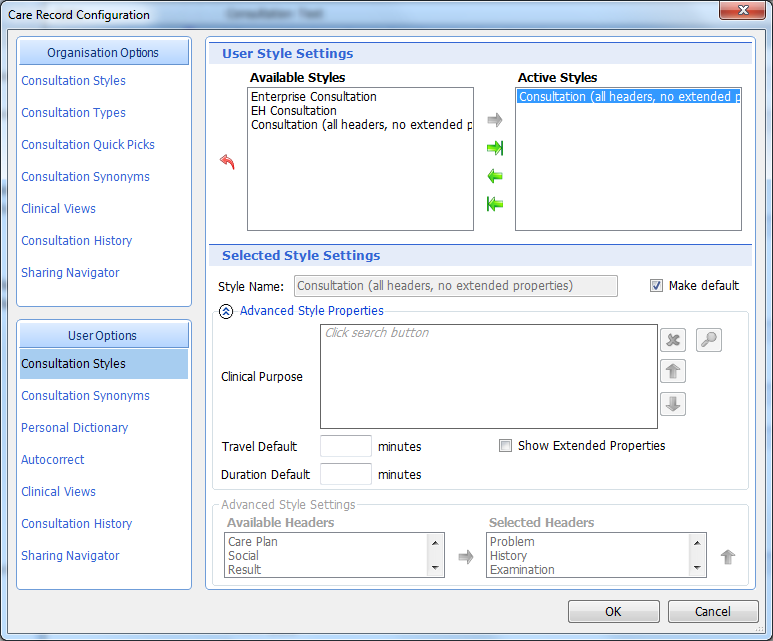


Click on **CR Config**:

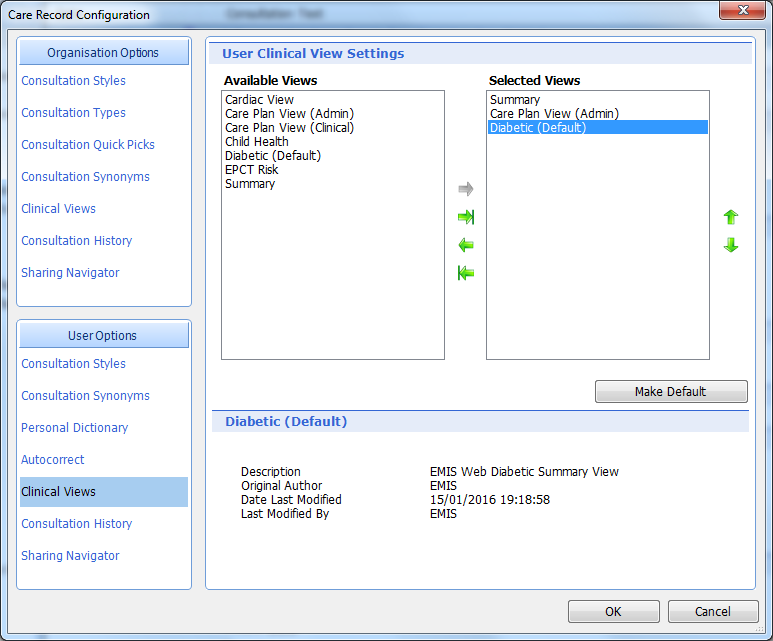


Under **User Options – Consultation Styles –** Select your appropriate Consultation style and tick **‘Make Default’**:

And remove **Quick Note** and any other options under Active Styles:

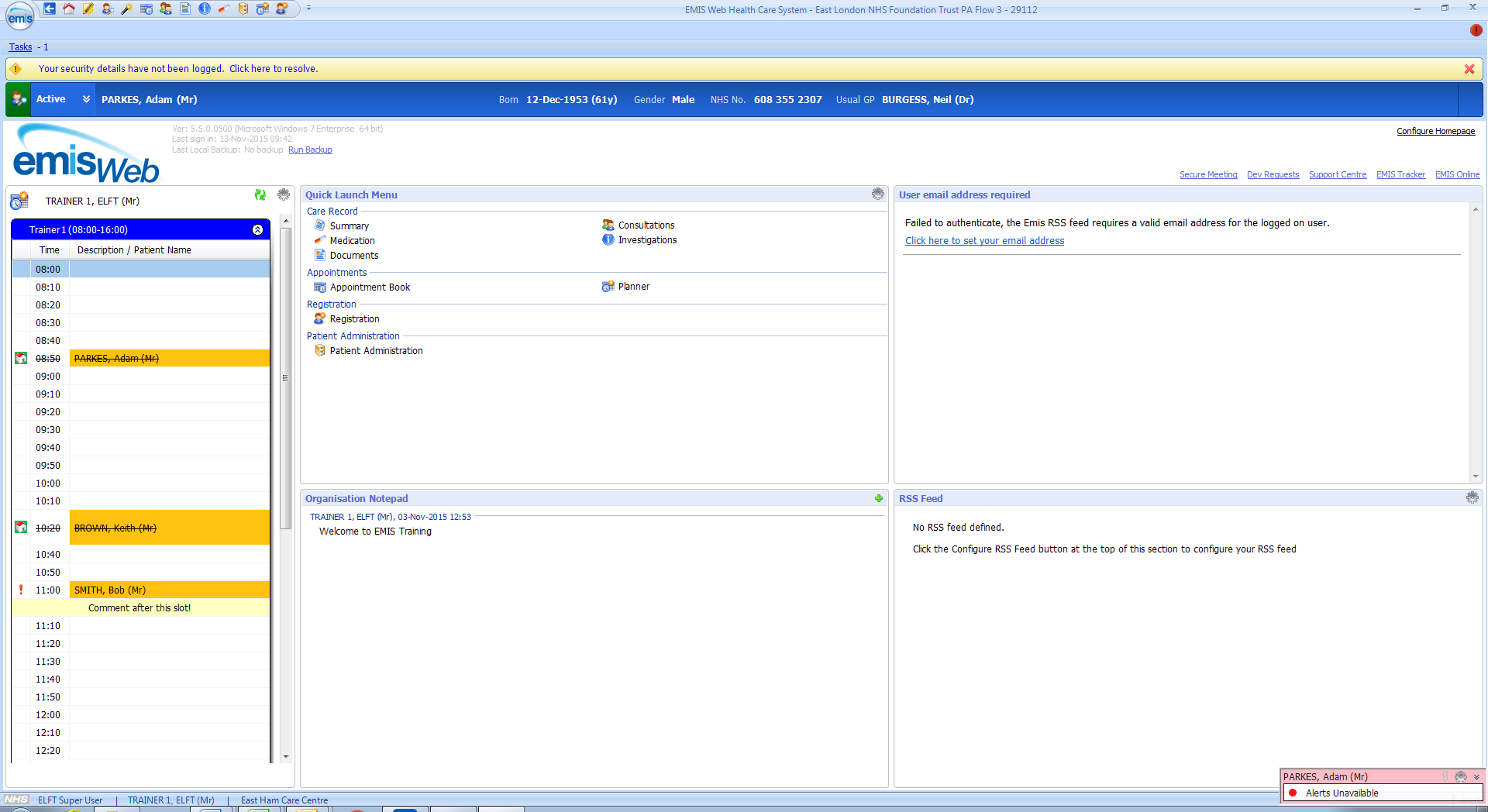


Under **User Options – Clinical Views –** Select your required View and click on **‘Make Default’.**

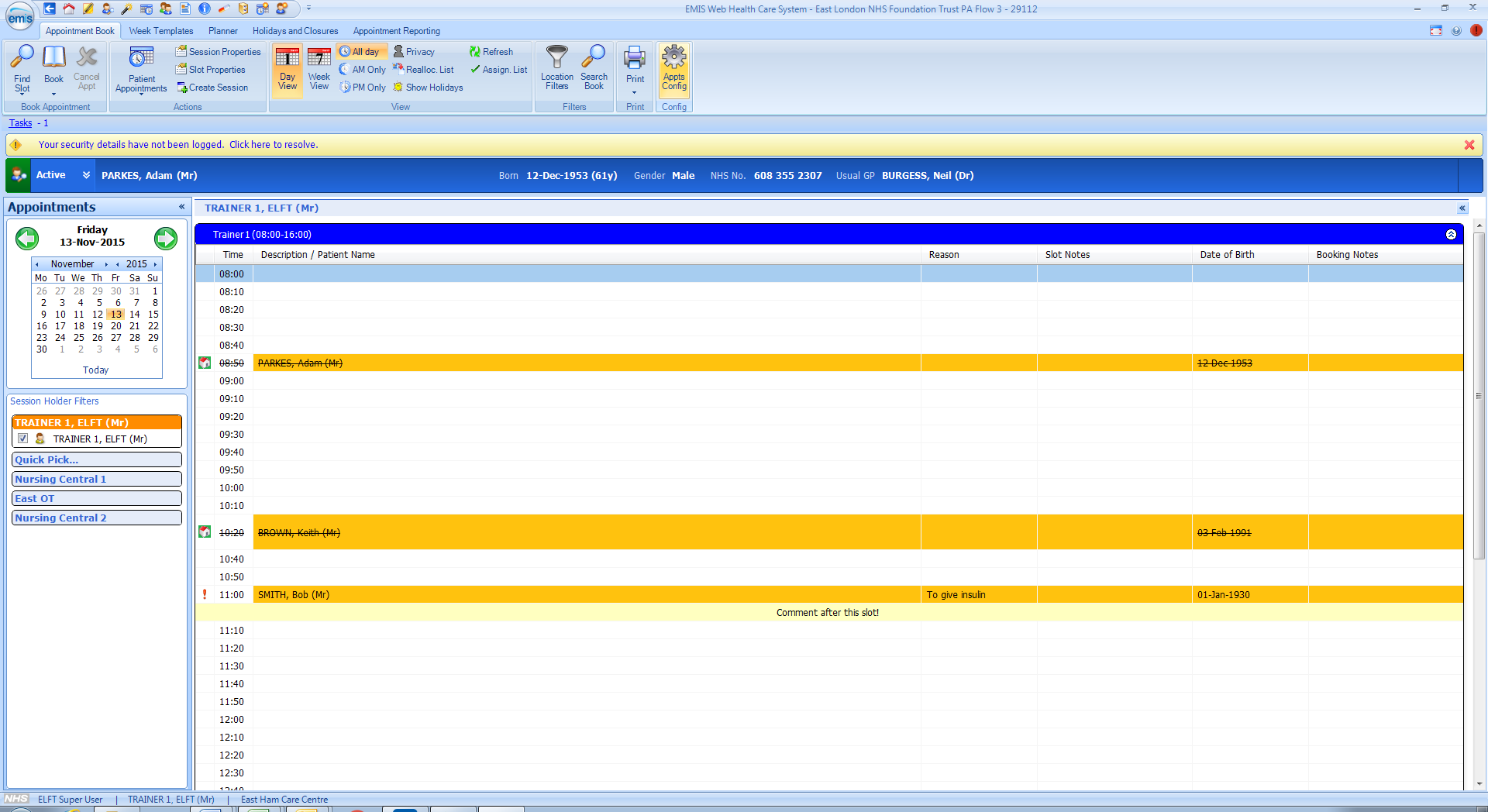


**Configuring Users Appointments:**

Click on **Appointment Book**:

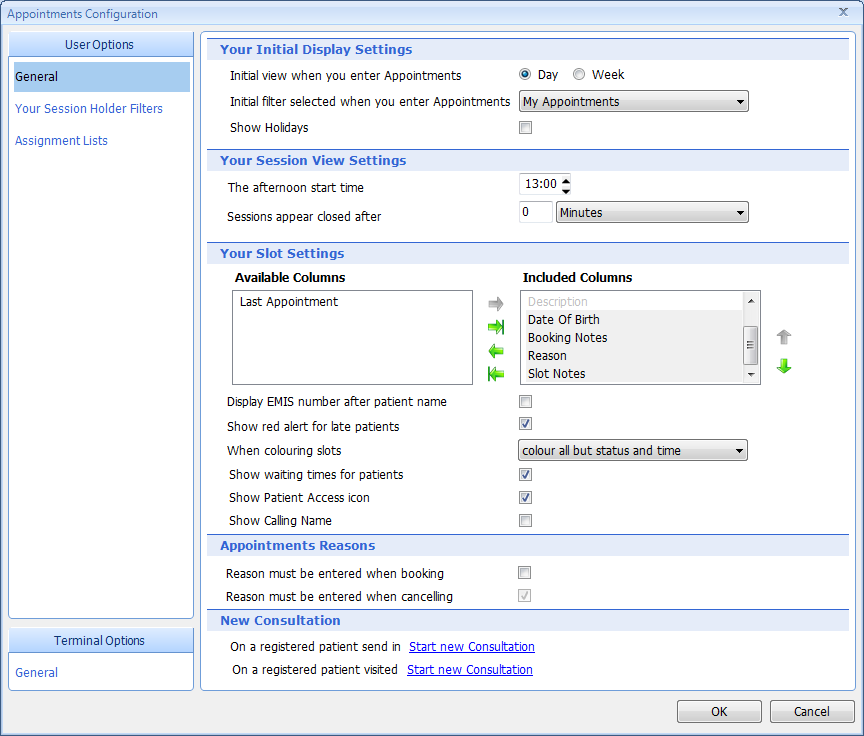


Click on **Appts config:**



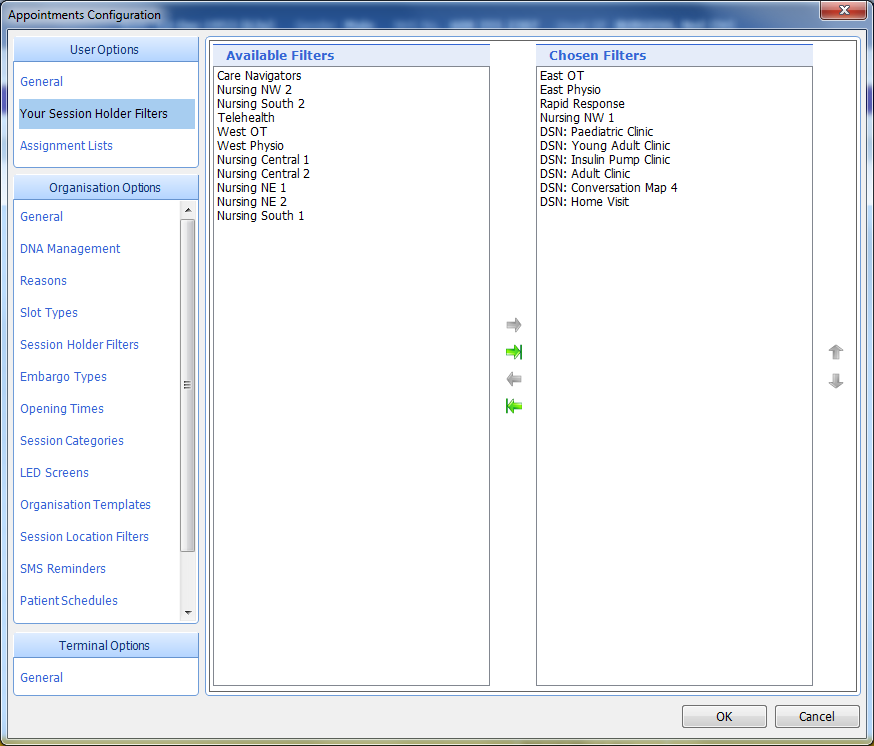
Click on **General.**

Ensure the **Included columns** are selected and are showing in the EXACT order as below:

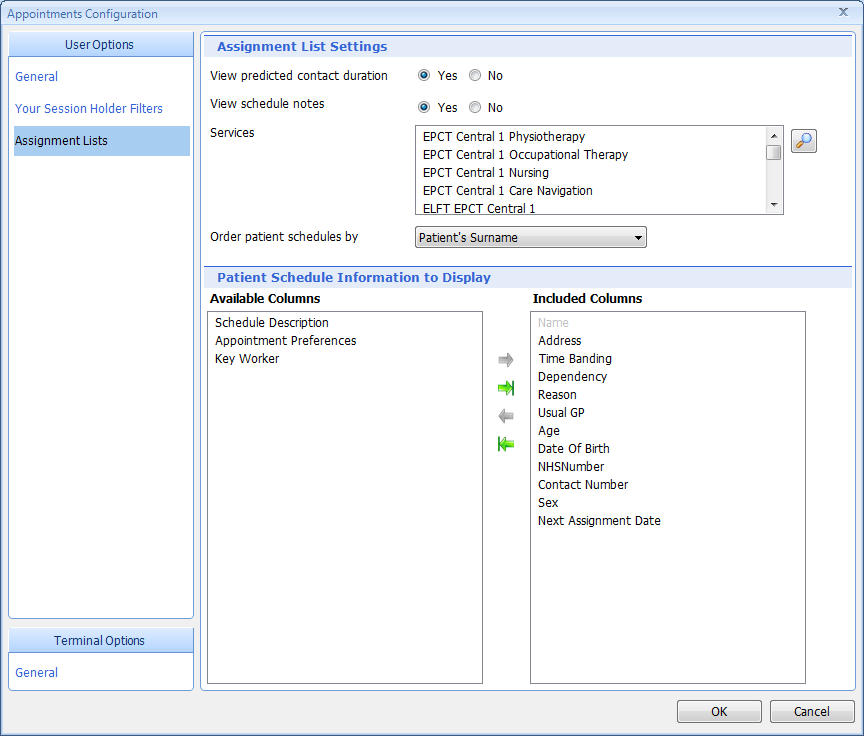


And finally, under **‘New Consultation’** click on **‘Do Nothing’** for both options so it displays ‘**Start New Consultation’** for both options if you want to automatically link to a Consultation from SEND IN in the Appointment Book.

Click on **Your Session Holder Filters** andselectONLYthe diary filters that are relevant to you. This may only be 1 or 2.

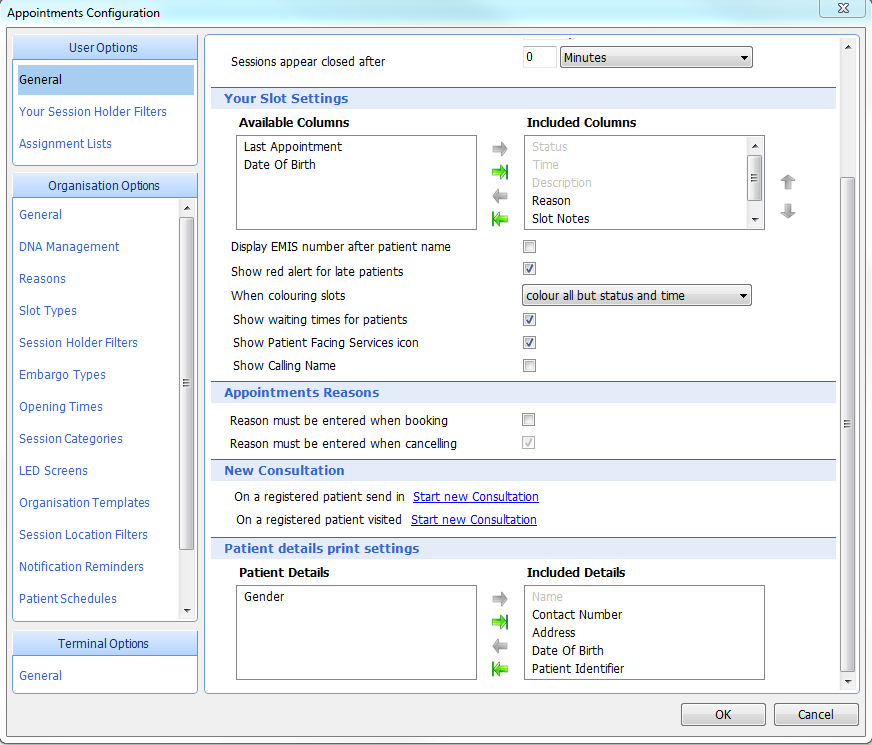


If applicable and your service uses schedules, Click on **‘Assignment Lists’.** Ensure **all options** are correctly selected as per below**.**



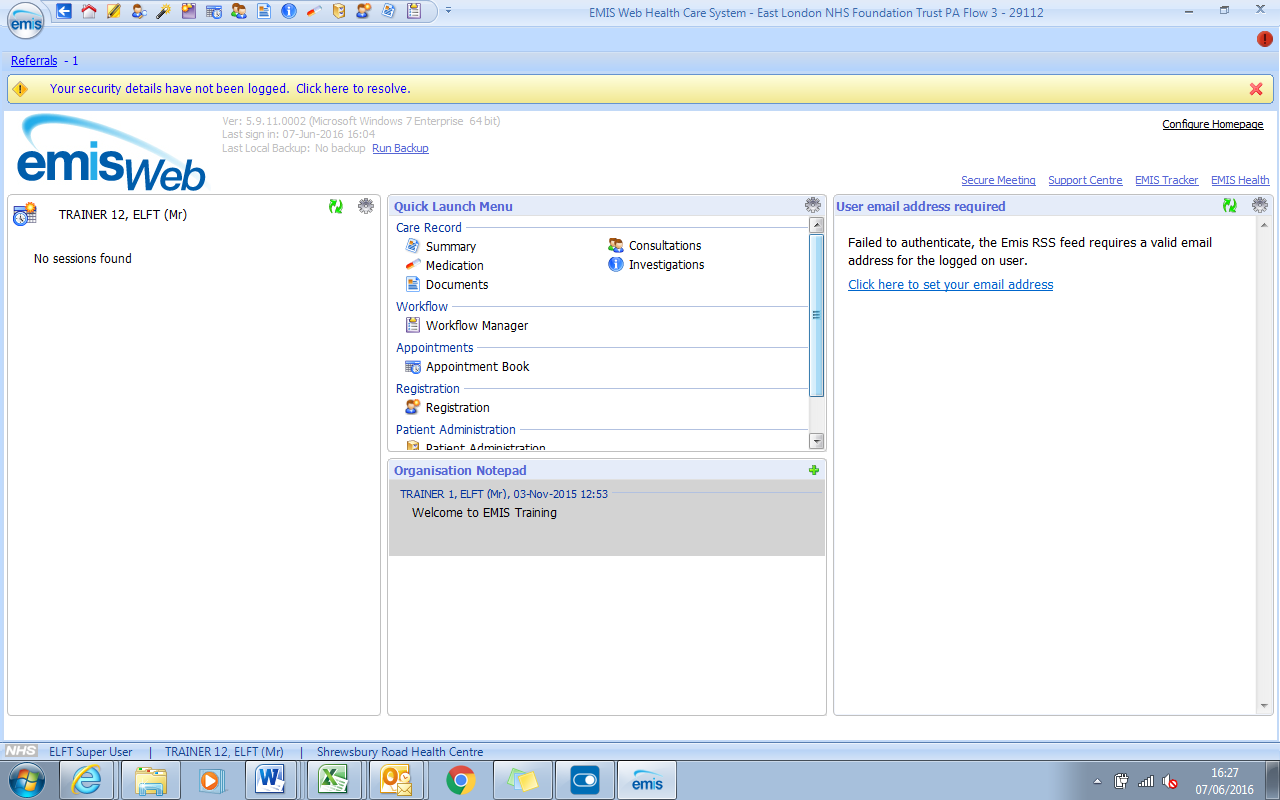
Under **Services** select ONLY the teams you will be assigning to if appropriate. Click on **‘OK’**

To ensure the relevant Patient details are visible when printing appointment books, configure the ‘Patient details print settings’ accordingly**:**

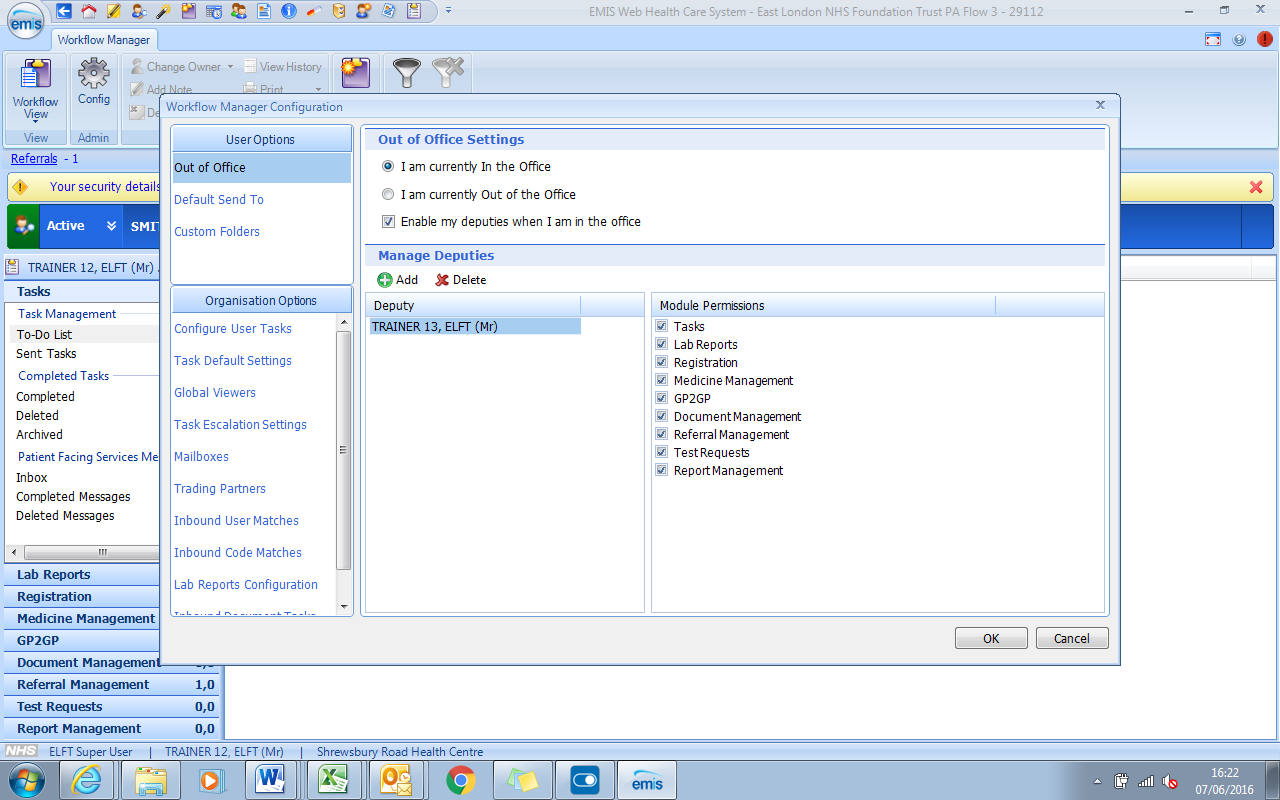


**Configuring Task Deputies:**

Click on **Workflow Manager**:



Click on **Config.** Tick **Enable my deputies when I am in the office.** Click on **Add** and select your deputy:



**Configuring Task Deputies:**

Click on **Workflow Manager**:

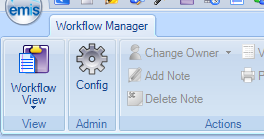


Workflow Manager Icon on Quick Launch Menu



Workflow Manager Icon on Quick Access Toolbar

Click on the Config button:



In the Workflow Manager Configuration screen, click on the ‘Add’ button and select the deputies / buddies you want. Should you wish to change your deputies, you can delete and add different colleagues using the delete and add functions when required

