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# USER DOCUMENTATION

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Manual



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KLAUDIA RAJS

# Patient

## Home panel

Home panel displays information about logged in patient.

## Help

If any problems occur in the during usage of the application and the manual is not at hand it could be found under “Help” button in the main view of the application.

## Running application

The application can be run in two ways. The way chosen depends on the user.

To run the application one of the following actions path should be taken.

### Method 1

Visual Studio 2015 should be opened and the patient booking system should be loaded. In order to run the application “Start Debugging” option should be chosen from the “Debug” tab on the top menu.

### Method 2

In order to run the application, navigate to the project folder then follow this path:

PatinetBookingSystem/bin/Debug

Double click on PatientBookingSystem file (application type).

## Logging in

### Credentials

The system does not provide utility for registration. Login and password should be obtained from the surgery.

### Logging in

In order to log in, login credentials need to be filled into the form. Both login and password should contain at least 4 characters. Enter login and password and click “Log in” button in order to enter the system.

### Exit

In order to exit the application without logging in, click either “Exit” button on the bottom of the window or “X” button on the top of it.

## Troubleshooting

### Requirements

*Credentials does not meet the requirements*

If above message pop-up on the screen it means that entered credentials does not meet the requirements. Please, ensure that you entered correctly the data. Make sure that CAPSLOCK is not turned on or that the keyboard is set to the correct mode.

### Something went wrong

*Something went wrong. Please, contact administration.*

This message indicates problem with logging in. Please, ensure that you entered correctly the data. Make sure that CAPSLOCK is not turned on or that the keyboard is set to the correct mode. If all of the following seems to be correct, contact the surgery and inform them about the problem.

### Personal information

In order to access personal information stored by the surgery click on the “Personal information link” on the left panel of the application. From time to time access this tab and make sure that all the information there are correct.

### Saving settings

It is possible to save the preferences for email notifications, verification methods and booking confirmation methods within the settings tab in the application. If any of the checkboxes is greyed-out it means that the surgery does not provide such method.

In order to save the preferences, please check boxes you want to use and click “Save” button.

### Find appointment

In order to book an appointment, click on “Find appointment” link on the left panel of the application. The schedule opens for current month. Lighter boxes represent dates with appointments available for booking. Darker does not contain any appointments that could be booked.

## Filtering

### *By time of the day*

In order to filter the content by the time of the day click on one or both of the checkboxes in the filter area on the top of the page. The number of boxes might change. In order to clear the filter, uncheck either both or one of the checkboxes.

### *By staff member*

To filter the content of the timetable by staff member, choose name of a staff member from the drop-down list.

**WARNING!** Filters do combine! The application shows only the dates that contain appointments meeting ALL the requirements.

[Go back to admin mode manual.](#)

### Distant date

In order to find appointments in more distant future click on the arrow right to the month name to navigate between months.

**WARNING!** The schedules are entered by the surgery staff members, so if there are no appointments in none of the displayed dates it might mean that surgery has not entered the information into the system yet. However, contact the surgery for the assurance.

[Go back to admin mode manual.](#)

## Booking

To book an appointment click on selected day (only days with lighter colour contain available appointments). In single day schedule that opens choose the slot and click it.

**WARNING!** Only clicking on the slots marked as “Available” is possible. Clicking on any other slot should not result in any reaction.

In the window that open examine all the data and confirm booking by clicking “Book” button.

## Troubleshooting

### *My appointment does not show in upcoming appointments*

If the appointment booking process return “Success” message, please contact the surgery to ensure that the appointment has been booked.

### Past appointments

In order to access past appointments data, click on “Past appointments” button on the left panel of the application.

### Printing confirmation

In order to print confirmation of the past appointment, click on the print confirmation button. In the window that pop-up make sure that all the data is correct and either confirm printing by clicking “Print” button or resign by clicking “Close” button.

**WARNING!** Clicking “Print” will instantly start printing using the default printer of the system.

## Troubleshooting

### *No appointments in the section*

If there are no appointments in the section might mean that the history of appointments for the credential does not exists yet. If however that statement is not true, please contact the surgery.

### Upcoming appointments

In order to access upcoming appointments, click on the “Upcoming appointments” on the left panel of the application.

### Printing confirmation

In order to print confirmation of the upcoming appointment, click on “Print confirmation” button. In the window that pop-up make sure that all the data is correct and either confirm printing by clicking “Print” button or resign by clicking “Close” button.

**WARNING!** Clicking “Print” will instantly start printing using the default printer of the system.

[Go back to admin mode.](#)

## Reschedule

### *Cancelling*

**IMPORTANT!** Before rescheduling make sure that there are appointments left on the day of the appointment. Rescheduling is possible only on the same date!

In order to reschedule click on “Reschedule” button below the appointment. Confirm willingness to cancel the appointment.

**WARNING!** If cancellation was confirmed and no new appointment was scheduled the appointment would be cancelled permanently!

[Go back to admin mode.](#)

### *Rebooking*

Choose a slot to be booked. In the new window that opens examine the information, ensure all the data is correct and confirm booking by clicking “Book” button.

## Cancel

In order to cancel upcoming appointment, click on “Cancel” button below the appointment. Confirm willingness to cancel the appointment.

[Go back to admin mode.](#)

## Troubleshooting

### *Rescheduling for different date*

At this version of the project it is only possible to reschedule appointment within the same day.

*I have cancelled my appointment and there were no appointments free for the day!*

Contact your surgery and ask them rebook the appointment (if it's still available).

# Admin

Majority of functionalities match the one described in the patient section. However, to avoid any confusion the list of functionalities that are exactly the same is listed below.

1. [Help](#)
2. [Running application](#)
3. [Logging in](#)
4. [Personal information](#)
5. [Saving settings](#)

## Home panel

The admin mode does not contain a regular summary home panel. The home panel for admin mode is the same as surgery management panel.

## Find appointment

The process of booking the appointment does not differ from patient mode apart from the booking process in patient mode. For the instruction refer to these parts:

1. [Filtering](#)
2. [Distant date](#)

## Booking

To book an appointment click on selected day (only days with lighter colour contain available appointments). In single day schedule that opens choose the slot and click it.

**WARNING!** Only clicking on the slots marked as “Available” is possible. Clicking on any other slot should not result in any reaction.

In the window that opens choose a patient from the drop-down menu on the top of the confirmations. Ensure that all the data is correct and click “Book” to confirm.

**WARNING!** It is mandatory to choose patient. Not choosing a patient will NOT book an appointment for the admin!

## Upcoming appointments

Majority of functionalities provided by upcoming appointments feature match the one described in the patient section. However, to avoid any confusion the list of functionalities that are exactly the same is listed below.

1. [Printing confirmation](#)
2. [Cancel](#)

## Rescheduling

**IMPORTANT!** Remember the name of the patient you are rescheduling the appointment! At this version of the application that information will NOT be provided in the booking confirmation.

Rescheduling is very similar to the process in the patient mode. Following steps does NOT differ from patient's mode:

1. [Cancelling](#)

## Rebooking

When the booked appointment is cancelled, the application opens a single day timetable (the same day as the cancelled appointment).

Choose an appointment to be booked and click on it. In the window that open (booking confirmation window) select the patient from the drop-down menu. Ensure to choose the same patient that the cancellation was processed for. Click "Book".

## Edit

In order to edit the attendance status of the appointment, please click on "Edit" button next to the attendance status to be edited. Ensure that all the data is correct, choose attendance status from the drop-down menu and click "Save" button.

**WARNING!** It is mandatory to choose any status.

## Surgery management

Use this section to manage staff, patients and surgery information. Surgery management view opens as a home panel when the user logged in has "ADMIN" status. Surgery management view can be access by either clicking on "Home" link or on "Surgery management" link on the left panel of the application.



### Adding a staff member

In order to add a new staff member to the system click on “Add staff member” link on the top of the view. Fill in the form and click “Save” button.

**IMPORTANT!** Following fields are mandatory:

- first name - no shorter than 3 character
- last name - no shorter than 3 character
- staff type

### Adding a patient

In order to add a new patient to the system click on “Add new patient” link on the top of the view. Fill in the form and click “Save” button.

**IMPORTANT!** Follow the rules below to avoid error messages:

- first name – cannot be empty
- last name – cannot be empty
- login – must contain between 3 and 44 characters
- password – must contain at least 3 characters
- date of birth – must be earlier than today
- email – must contain “@” character and “.” character
- address – must contain at least one space

### Entering exceptional day off

To add a new exceptional day off for the surgery or for a staff member, click on “Enter exceptional day off” on the top of the page. Fill in the form and click “Save” button.

**IMPORTANT!** Follow the rules below to avoid error messages:

- Either the “Whole surgery” checkbox need to be checked or a staff member need to be picked.
- Start date has to be earlier or equal to end date.

### Cancelling/editing appointments

In order to cancel appointment, click on “Cancel / edit appointment” link on the top of the view.

### *Searching*

In order to find the appointment to be cancelled select the parameters. Before choosing staff member or patient the drop-down menus need to be enabled by clicking the checkboxes next to them.

Choosing either patient or staff member results in refreshing the list of the other filtering it by displaying only names associated with the selected one. For example:

Nurse Highland had an appointment only with patient Smith. Choosing nurse Highland from the staff member drop-down results in refreshing the patient list to display only patient Smith (as nurse had appointment only with this patient). Reselecting patient Smith from patient drop-down results in refreshing staff members list to display only those with whom patient Smith had ever had an appointment.

Date picker is enabled by default, which means that by default the appointments are search for the current date. Clicking on the checkbox next to the date picker results in searching appointments on any date in the future.

**WARNING!** Searching with date picker disabled might mean displaying very large amount of appointments which might results in slowing down or crushing the application.

### *Cancelling*

In order to cancel an appointment, perform a search that give a result (appointment box or boxes appear). Click "Cancel" button under the appointment to be cancelled. Ensure that all the information in the window that pops up are correct. To confirm the cancellation, click "Yes".

**WARNING!** Such cancellation cannot be reverted! Make sure that it is performed for the right patient and the right appointment!

### *Editing the attendance status*

In order to edit attendance status of the appointment either navigate to upcoming appointments view or search for the appointment in surgery management view by clicking on "Cancel / edit appointment". While the appointment is located click "Edit" button next to the appointment attendance of which you want adjust. Ensure that all the data is correct and click "Save".

**IMPORTANT!** Choosing a status is mandatory! If no status has been choose, just close the window by clicking “X” (Windows exit button) or pressing “Esc” on keyboard.

### Adding schedule entry

#### *Single entry*

In order to add new schedule entry (for a single day) click on “Add schedule” link on the top of the page. When two options appear below, click on “Single entry” link.

Fill in the form and click “Save” button on the bottom of the view.

**IMPORTANT!** In order to avoid error messages, please follow rules stated below:

- shift start time cannot be later than shift end time
- break start time cannot be later than break end time
- staff member must be picked

#### *Multiple entries*

To enter multiple schedule entries, click on “Add schedule” link on the top of the page. When two options appear below, click on “Multiple entries” link.

Fill in the form and click “Save” button on the bottom of the view.

**IMPORTANT!** In order to avoid error messages, please follow rules stated below:

- at least one of the days of the week need to be enabled
- in all of the enabled working days, shift start times need to be earlier than shift end times
- in all of the enabled working days, break start times need to be earlier than break end times
- at least one month need to be chosen from the drop-down menu
- a staff member need to be picked from the drop-down menu

# Tester mode

## Running application

If the application is under tests by tester following requirements need to be met:

- Visual Studio 2015 Community Edition with MySQL connector must be installed on the machine
- The machine running the application must be located within Dundee and Angus College or steps below must be taken prior to application testing

**WARNING!** Not all of the MySQL connectors works properly! Make sure that the right one is installed.

**WARNING!** If the testing is to be performed outside of Dundee and Angus College following steps need to be done:

- Local MySQL server need to be running.
- MySQL database need to be created and populated using provided in PBS\_DATABASE.sql commands.
- config.cs file must be adjusted by commenting out lines 4-7 and uncommenting lines 9-12 (connection options)

## Logging in

If the all the steps from running application were performed successfully it is possible to log in into the application with following credentials

## Patient mode

- Login: "patient"
- Password: "patient"

## Admin mode

- Login: "admin"
- Password: "admin"