



STS quick start guide

Welcome to the Sight Test Services quick start guide. The purpose of this guide is to give you an understanding of the main controls that the application comprises of.

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Basic layout

The screenshot shows the STS software interface. The header (1) contains the user name 'Hello Administrator' and the login time 'Last logged in: 2011-07-14 08:14'. The main menu (2) is on the left, listing options like Dashboard, Today, Homes, Patients, Private patients, Jobs, Pending jobs, Active jobs, Clinics, Active clinics, Scheduler, Calendar, Preferences, Tests, News, and Preferences. The work area (3) displays several sections: 'Favourites' (no favourites saved), 'Unscheduled patients due', 'Upcoming events', 'Upcoming clinics' (with a table of clinics), 'Jobs delivery summary' (with a table of jobs), 'Upcoming jobs', and 'Patients due'. The footer (4) shows 'Version: 3.7.3' and 'Copyright 2011 © Sight Test Services'.

Name	Start	Finish	Patients
Clinic 2011-07-03	2011-07-03 16:00:00	2011-07-03 17:30:00	2

Home	Postcode	Clinic	Clinic start	Jobs to be delivered	Jobs outstanding
Bedfordshire home	Postcode			15	12
Hertfordshire home	Postcode			5	5

The screen is split into four main areas:

1. Header (at the top of the screen)
2. Main menu (at the left hand side)
3. Work area (typically this displays a list, calendar or a property form)
4. Footer (at the bottom of the screen)



Header



Hello Administrator. Last logged in: 2011-07-14 08:14



The header displays the last time you logged in as well as the logout button (highlighted with the red box above). If you use the application in a public place (e.g. an internet café) it is important you log out using this button when you have finished.

Main menu

The main menu is the primary tool for navigating around the application. Each section is shown as a link and to navigate to that section simply click on it.

One feature of the menu is that it will show a history of which pages you visited since clicking the currently selected section. These 'bread crumbs' will appear below the selected section. You can click a bread crumb to go back to that page.

To help make this concept clear take a look at the menu to the right. There are two bread crumbs below the Clinics section (highlighted with a red border). This shows that the user selected Clinics from the menu, picked a particular Clinic from the list and then clicked on *View patients* from the Clinic property form.

Menu
Dashboard Today
Homes Patients Private patients
Jobs Pending jobs Active jobs
Clinics
Clinic
Clinic patients
Active clinics
Scheduler Calendar
Analysis
Primary Care Trusts
Documents Templates Preferences

Lists


<input type="checkbox"/>	Name	Start ↓	Finish	Patients	PCT	Status
<input type="checkbox"/>	Clinic 2011-06-15	2011-06-15 16:00:00	2011-06-15 16:30:00	2	Essex North-East	Closed
<input type="checkbox"/>	Clinic 2011-06-24	2011-06-24 20:00:00	2011-06-24 21:30:00	2	Essex Mid	Closed
<input type="checkbox"/>	Clinic 2011-06-29	2011-06-29 09:00:00	2011-06-29 09:30:00	2	Essex South West	Processing
<input type="checkbox"/>	<i>i</i> Clinic 2011-07-03	2011-07-03 16:00:00	2011-07-03 17:30:00	2	Essex South East	Open
<input type="checkbox"/>	Clinic 2011-09-04	2011-09-04 10:00:00	2011-09-04 10:30:00	5	Essex South East	Open
<input type="checkbox"/>	Clinic 2011-09-14	2011-09-14 09:00:00	2011-09-14 11:00:00	5	Essex South West	Open
<input type="checkbox"/>	Clinic 2011-10-24	2011-10-24 18:00:00	2011-10-24 19:30:00	3	Essex North-East	Open
<input type="checkbox"/>	Clinic 2011-10-25	2011-10-25 12:00:00	2011-10-25 13:00:00	5	Essex Mid	Open
<input type="checkbox"/>	Clinic 2011-10-30	2011-10-30 17:00:00	2011-10-30 17:30:00	4	Essex North-East	Open
<input type="checkbox"/>	Clinic 2011-12-17	2011-12-17 11:00:00	2011-12-17 12:00:00	4	Essex West	Open

Page 1 of 1 (10 records)

Add clinic

All of the lists in the application behave in the same way and can all be sorted, filtered, exported, and saved as a favourite. If the list has a lot of entries then it will have a series of pages. You can choose which page to view by using the page selector which appears at the bottom of the list when appropriate.


To sort by a particular list column click on the column name. Each extra click on the same column will cycle the sorting as follows: ascending, descending and no sorting. An arrow will indicate if the sort is ascending (down arrow) or descending (up arrow).


To filter (i.e. to reduce the size of the list in order to find a particular record or records) you can use the Search fields. These fields (found in the area just below the list header) allow you to create rules. Choose a column name, an operator (e.g. 'starts with'), a value and click the Search button . The list will then show all records that conform to that rule. The list will always give you one empty search rule so you can filter on multiple rules if you wish. To remove a rule simply clear the rule value and press the Search button.

Tip: You can press the Enter key instead of clicking the Search button.

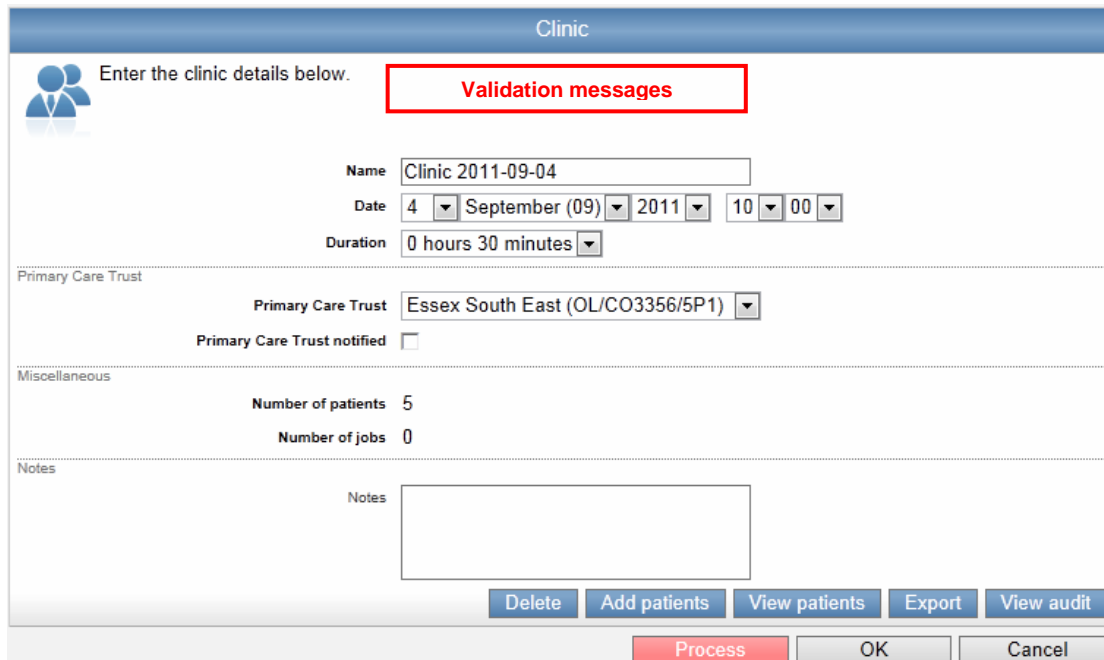
Some lists also have the ability to perform Actions. These Actions generally act upon the rows that have been selected. To select a row for an Action click the respective checkbox in the first column. The list shown in the image above has an 'Export patients (csv)' Action.



The export button  (in the top left of the list) will take all records in the list, apply the same filters and sorting, and create a spreadsheet which you can either open or save to your computer.

To save the list as a favourite click the  button. It is important to understand that saving a list does not save the data in the list but merely the search criteria and sort column.

Property forms



The screenshot shows a web form titled "Clinic". At the top left, there is a "Validation messages" box. Below it, the form is divided into sections: "Enter the clinic details below." with fields for Name, Date, and Duration; "Primary Care Trust" with a dropdown menu and a checkbox; "Miscellaneous" with fields for Number of patients and Number of jobs; and "Notes" with a text area. At the bottom, there are buttons for "Delete", "Add patients", "View patients", "Export", "View audit", "Process", "OK", and "Cancel".

The property form shows a collection of fields for a given record (in the image above a Clinic is shown). This is where you can make changes to a record or enter the details of a new record.

If the field is mandatory (this means it needs to be completed in order for the record to save) the name will be in bold.

By pressing the *OK* button you will save the changes and go back to the previous page. If you decide that you don't want to save the changes press the *Cancel* button.

When the record is about to be saved the values are checked to make sure they are all correct (e.g. dates are valid, all mandatory fields are filled in). If there are any invalid fields the record will not save and you will be presented with a list of the validation messages (the location is shown in the image above). All invalid fields will also have their names coloured in red.



Above the *OK* and *Cancel* buttons are a series of link buttons. These allow you to perform a particular operation relating to the record. In the case of a Clinic, one link button allows you to view the Clinic patients. An important thing to note is when you click a link button the record will be automatically saved before navigating away. This means the form will be validated in exactly the same way as if you clicked the *OK* button. If there are invalid fields you will stay on the properties screen.

Tip: To move through the fields use the Tab key on the keyboard.

Footer

Version: 3.7.3

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The footer displays the application version number and the copyright.