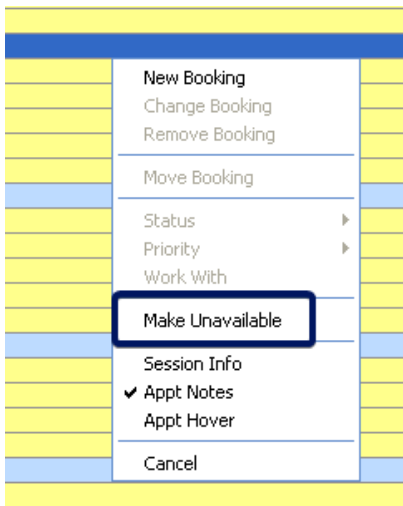


# How to Use Diary Overrides in an Appointment Diary

RoboVet 5



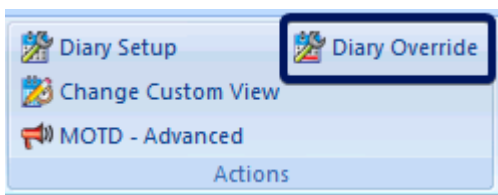
- When you first log into RoboVet, you will be on the client tab and on diary view.
- Note that diary overrides should be used when you need to adjust diary availability on a date or dates. If you wanted to alter a session length permanently then you should change the diary setup instead.



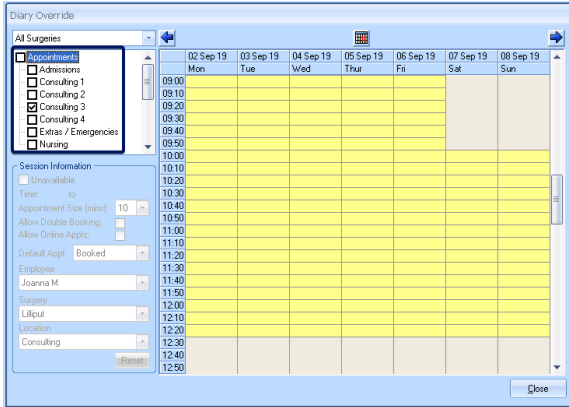
- To make a single slot unavailable, display the appointment diary and left click to highlight the slot.
- You will only be able to do this if you have override permissions.
- Right click and a pop-up menu will appear.
- Select **Make Slot Unavailable**.
- If you do not have the **Make Slot Unavailable** option, you do not have access to perform this function.

|    |                      |
|----|----------------------|
| 10 | x1 Isolation Walk in |
|    | 2 Cattery            |
| 1  | x1 Cat               |
| 2  | x1 Cat               |
| 3  | x1 Cat               |
| 4  |                      |
| 5  | x1 Cat               |
| 6  | x2 Cat               |
| 7  | x2 Cat               |
| 8  | x2 Cat Basket        |

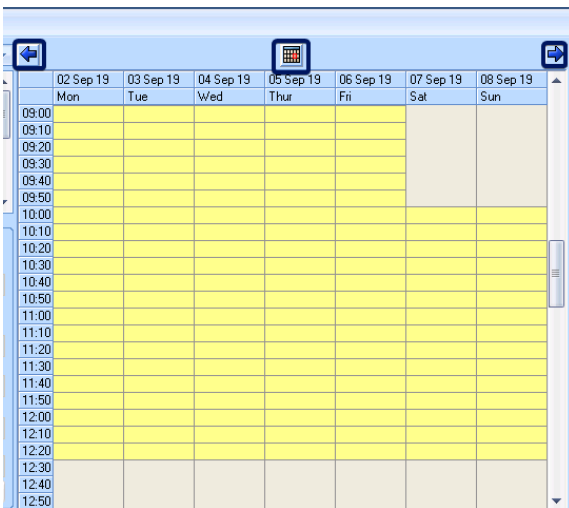
- The slot will now be greyed out and not be able to be booked.



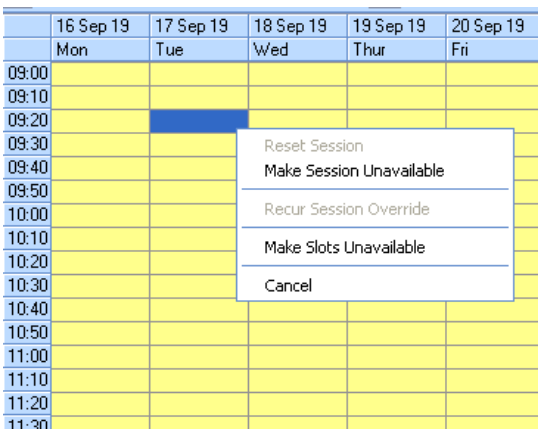
- Click **Diary Override** on the **Actions** toolbar.
- This will give you more override actions.
- This is a permission-based area, if you do not have the diary override button, the you do not have access to perform this function.



- The **Diary Override** pop up box will appear.
- Any diaries will be listed.
- Put a tick next too the diary you wish to add **Diary Overrides** for.



- Choose the date you wish to add the **Override** in for.
- You can select the date from the calendar or use the **forward** or **back** arrows to get to the date you need.



- Click the appointment slot you want to make unavailable, so the slot is highlighted.
- Right click and a pop-up menu will appear.
- There are two options, **Make Session Unavailable** and **Make Slots Unavailable**.

|       | 16 Sep 19 | 17 Sep 19 | 18 Sep 19 |
|-------|-----------|-----------|-----------|
|       | Mon       | Tue       | Wed       |
| 09:00 |           |           |           |
| 09:10 |           |           |           |
| 09:20 |           |           |           |
| 09:30 |           |           |           |
| 09:40 |           |           |           |
| 09:50 |           |           |           |
| 10:00 |           |           |           |
| 10:10 |           |           |           |

- **Make Slots Unavailable** will turn the slot grey which means no appointments can be booked at that time.

|       | 16 Sep 19 | 17 Sep 19 | 18 Sep 19 | 19 Sep 19 | 20 Sep 19 |
|-------|-----------|-----------|-----------|-----------|-----------|
|       | Mon       | Tue       | Wed       | Thur      | Fri       |
| 09:00 |           |           |           |           |           |
| 09:10 |           |           |           |           |           |
| 09:20 |           |           |           |           |           |
| 09:30 |           |           |           |           |           |
| 09:40 |           |           |           |           |           |
| 09:50 |           |           |           |           |           |
| 10:00 |           |           |           |           |           |
| 10:10 |           |           |           |           |           |
| 10:20 |           |           |           |           |           |
| 10:30 |           |           |           |           |           |
| 10:40 |           |           |           |           |           |
| 10:50 |           |           |           |           |           |
| 11:00 |           |           |           |           |           |
| 11:10 |           |           |           |           |           |
| 11:20 |           |           |           |           |           |

Reset Session

Make Session Unavailable

---

Recur Session Override

**Make Slots Unavailable**

Cancel

- Repeat the previous steps to make individual slots unavailable as required.
- To make several slots together unavailable highlight the starting slot and drag the mouse to the end slot.
- Right click the highlighted area then choose **Make Slots Unavailable**.

|       | 16 Sep 19 | 17 Sep 19 | 18 Sep 19 | 19 Sep 19 |
|-------|-----------|-----------|-----------|-----------|
|       | Mon       | Tue       | Wed       | Thu       |
| 09:00 |           |           |           |           |
| 09:10 |           |           |           |           |
| 09:20 |           |           |           |           |
| 09:30 |           |           |           |           |
| 09:40 |           |           |           |           |
| 09:50 |           |           |           |           |
| 10:00 |           |           |           |           |
| 10:10 |           |           |           |           |
| 10:20 |           |           |           |           |
| 10:30 |           |           |           |           |
| 10:40 |           |           |           |           |
| 10:50 |           |           |           |           |
| 11:00 |           |           |           |           |
| 11:10 |           |           |           |           |
| 11:20 |           |           |           |           |
| 11:30 |           |           |           |           |
| 11:40 |           |           |           |           |
| 11:50 |           |           |           |           |
| 12:00 |           |           |           |           |
| 12:10 |           |           |           |           |
| 12:20 |           |           |           |           |

- **Make Session Unavailable** will turn the session grey which means no appointments can be booked in that session.

Session Information

Unavailable

Time: 09:00 to 12:30

Appointment Size (mins):

Allow Double Booking:

Allow Online Appts:

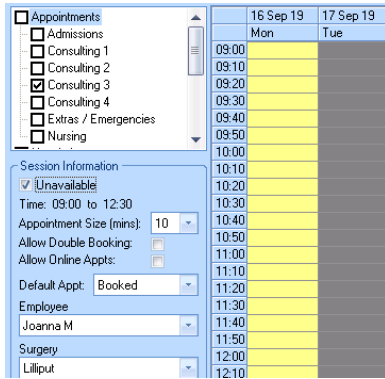
Default Appt:

Employee:

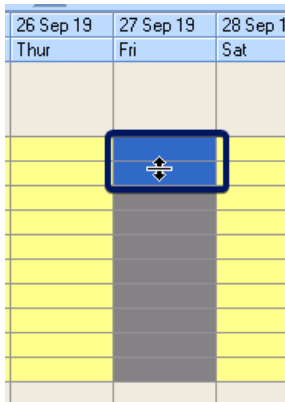
Surgery:

Location:

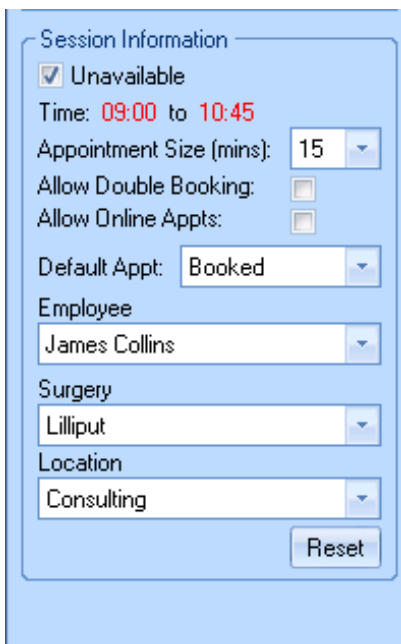
- Repeat the steps to make sessions unavailable as required.
- You can also make sessions unavailable by clicking the **Unavailable** tick box on the **Session Information Section**.



- Using the **Unavailable** tick box in the **Session Information Section** will turn the session grey. This means no appointments can be booked in that session.



- A session length can be adjusted.
- To change the start time of the session, click on the start of the session and drag the mouse down to the new start time.
- To change the end time, click on the end of the session and drag the mouse up to the new end time.



- In the left panel there is the session information.
- If the time is shown in red, it means a session start or end time has been adjusted.
- You can change the **Appointment Size**, however we would not recommend making any changes to it as a diary override.
- **Allow Double Booking** applies to the whole session.
- **Online Appts** is only used if your practice uses **Report Online Scheduling** which allows your clients to book their own appointments online.
- You can also change or add an **employee** in the override. Changes will show in red.

Session Information

Unavailable

Time: 09:00 to 10:45

Appointment Size (mins): 15

Allow Double Booking:

Allow Online Appts:

Default Appt: Booked

Employee: James Collins

Surgery: Lilliput

Location: Consulting

**Reset**

- **Reset** will clear all overrides on this session.

| 16 Sep 19 | 17 Sep 19 | 18 Sep 19 | 19 Sep 19 | 20 Sep 19 |
|-----------|-----------|-----------|-----------|-----------|
| Mon       | Tue       | Wed       | Thur      | Fri       |
|           |           |           |           |           |
|           |           |           |           |           |
|           |           |           |           |           |
|           |           |           |           |           |
|           |           |           |           |           |
|           |           |           |           |           |
|           |           |           |           |           |
|           |           |           |           |           |
|           |           |           |           |           |
|           |           |           |           |           |

Reset Session

Make Session Unavailable

**Recur Session Override**

Make Slots Available

Cancel

- You can repeat session overrides by using **Recur Session Override**.
- You need to make the initial override first.
- Click the session you want to add the override to.
- With the start time highlighted, right click the slot in the yellow session.
- Click **Recur Session Override**.

Recurring Overrides

Recurrence Pattern

Daily Every 1 week(s) on:

**Weekly**  Mon  **Tues**  Wed  Thur  Fri

Monthly  Sat  Sun

Yearly

Duration

Start: Tue 17/09/2019 End after: 1 occurrences

End by: Tue 24 Sep 2019

View Dates **OK** Cancel

- The **Recurring Overrides** pop up will appear.
- Set the **Recurrence Pattern** and **Duration** as required.
- **Cancel** if you make a mistake and need to start again.
- Click **OK** to set the recurring overrides.

Recurring Overrides

Recurrence Pattern

Daily Every 1 week(s) on:

**Weekly**  Mon  **Tues**  Wed  Thur  Fri

Monthly  Sat  Sun

Yearly

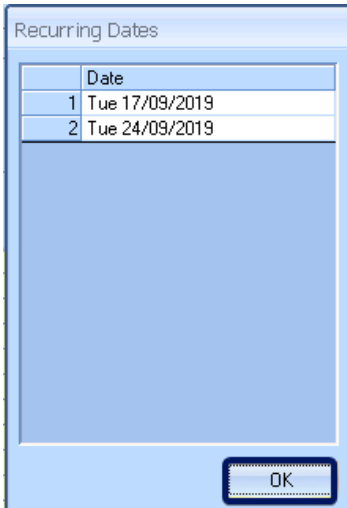
Duration

Start: Tue 17/09/2019 End after: 1 occurrences

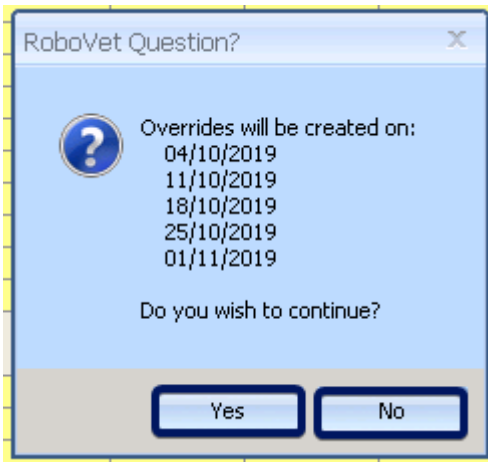
End by: Tue 24 Sep 2019

**View Dates** OK Cancel

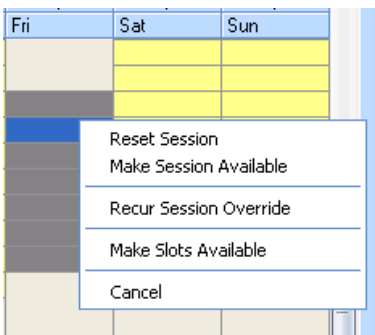
- **View Dates** will open a **Recurring Dates** summary box.



- This confirms the dates the diary overrides will be applied to according to the **Recurrence Pattern** and **Duration** you selected.
- It includes the initial override day you are basing the recurrence on.
- Click **OK**.
- This will return you to the **Recurring Overrides** window. You can make changes or if you're happy then click **OK** to set the recurring overrides.



- A pop up will confirm what additional overrides will be applied.
- Click **YES** to continue.
- Clicking **NO** will cancel the recurring overrides window and return you back to the initial diary override window.
- Because it copies all the overrides made on that initial session, it is important to check the overrides you have applied.
- It is possible to adjust any of the recurring overrides without affecting the original or others as it is a straight copy. This gives you complete flexibility when using the recurring overrides.



- In the Diary Override window, notice that the right click pop-up gives you some other options:
- You can reset a whole session's overrides or make highlighted slots available again.