axiUm User Guide for Personal Planner
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About this Guide

This axiUm User Guide will help you start using axiUm. It shows you how to:

• Follow document conventions.
• Familiarize yourself with the Personal Planner module.
• Use axiUm features for day-to-day tasks.

The examples in the axiUm User Guide show system-required field entries and may not reflect field entries typical of your institution. Check with your institution for a list of fields required to be completed before saving the current window. axiUm will not let you save your entries until all system-required entries are completed. If you try saving a window with incomplete system-required fields, a message box displays. When you close the message box, the cursor will be placed on the first system-required field that you missed. Once all system-required fields are entered, you can save and close the window.

Also note that default displays, tabs in windows, and other screen elements shown in the axiUm User Guide may look different from your axiUm setup.

Document Conventions

This manual uses the following styles to identify the different interface elements:

<table>
<thead>
<tr>
<th>Style</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bold</strong></td>
<td>Names of interface elements such as buttons, check boxes, list boxes, list views, menu names, menu choices, options, tabs, and text boxes.</td>
</tr>
<tr>
<td><em>Italics</em></td>
<td>Indicates when a special term is used for the first time, and to emphasize key words or terms.</td>
</tr>
<tr>
<td><strong>Monospace Fonts</strong></td>
<td>Data entered by the user.</td>
</tr>
</tbody>
</table>
Document Icons

This guide also uses the following icons to identify the different document elements:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Pencil" /></td>
<td>Notes and helpful information. For example, things that will become apparent later on in the procedure.</td>
</tr>
<tr>
<td><img src="image" alt="Bell" /></td>
<td>Important information or steps you must take. For example, if you do not complete this step you may be unable to complete a task later on.</td>
</tr>
<tr>
<td><img src="image" alt="Lightbulb" /></td>
<td>Tips, ideas, and alternative methods. For example, using shortcuts, applying previously learned tools, or suggesting different uses.</td>
</tr>
<tr>
<td><img src="image" alt="Warning" /></td>
<td>Warnings before taking action. For example, precautions against irreversible actions, or actions that require a lot of work to undo.</td>
</tr>
<tr>
<td><img src="image" alt="Apple" /></td>
<td>Challenges and extra steps. For example, steps that take you beyond the basic procedures.</td>
</tr>
</tbody>
</table>
Students can use the Personal Planner module to view a complete list of their workload for items such as:

- unapproved items (i.e., unapproved treatments)
- assigned patients
- appointments
- chart requests
- patient needs
- overdue patients
- dispensary requests
- lab orders

This chapter covers the following topics:

- Opening the Personal Planner module
- About the Personal Planner window

Read the following sections to familiarize yourself with the features of the Personal Planner module.

### 1 Opening the Personal Planner Module

There are different methods to access the Personal Planner module:

- Icon
- Actions menu
- Desktop

The following instructions describe these methods.
To open the Personal Planner module using the icon:

Click (Personal Planner).

To open the Personal Planner module using the Actions menu:

From the Actions menu, click Personal Planner.

To open the Personal Planner module using the Desktop:

From the Desktop, click (Personal Planner).

The next section describes the Personal Planner module window.
2 About the Personal Planner Window

This is how the Personal Planner window may look when you open it for the first time:

![Personal Planner Window](image)

You are now ready to begin using the Personal Planner window.
This chapter covers the setup tasks you must complete before using the Personal Planner module. You must have access rights (i.e., administrator access level) to access these windows.

This chapter outlines how to set up the Personal Planner tabs. Each tab displays a custom report.

At the end of this chapter you will be familiar with this task.

1 Setting up Personal Planner Tabs

This section covers the following tasks:

- Managing custom reports
- Setting up user access for custom reports

1.1 Managing Custom Reports

You can add up to 30 customized Crystal Reports to display in the Personal Planner window. Each Crystal Reports file you add is displayed in a separate tab in the Personal Planner window.

Adding Custom Reports

To add a custom report:

1. Go to Maintenance module's System tab.
2. Double-click the Custom Reports icon.
axiUm displays the Custom Reports window. For information on the Custom Reports window, refer to the axiUm Reference Manual for Maintenance and see *Custom Reports Window* on page 821.

3. Click (Clear Data).
   
   axiUm clears the fields.

4. From the *Type* drop-down field, select *Personal Planner*.

5. In the *Description* field, enter the text you want axiUm to display in the tab in the Personal Planner window. For our example, we will enter *Student Evaluations*.

6. In the *File* field, select the file path and name of the custom report by clicking (ellipsis) and browsing to the file’s location. For our example, we will select the Crystal Reports file called *StudentGrades.rpt*.

7. Click (Add a new Record).
axiUm adds the new record to the list view.

8. Click (Close).

axiUm closes the Custom Reports window.

You have now successfully added a Crystal Reports file. The Crystal Reports file you add here can be displayed in its own tab in the Personal Planner window.

Next, you must grant user level access to this Crystal Reports file. For instructions on granting user level access to Crystal Reports files, see *Setting up User Access for Custom Reports* on page 11.

**Modifying Custom Reports**

For our example, we will change the text displayed on the tab of the Personal Planner window from Student Evaluation to Evaluations, and also change the order of tab displays.

▼To modifying a custom report:

1. Go to **Maintenance** module's **System** tab.
2. Double-click the **Custom Reports** icon.
axiUm displays the Custom Reports window. For information on the Custom Reports window, refer to the axiUm Reference Manual for Maintenance and see Custom Reports Window on page 821.

3. From the Type drop-down field, select Personal Planner.

4. From the list view, highlight an item. For our example, we will highlight Student Evaluations.

We will change the name of the text displayed in the tab in the Personal Planner window.

5. In the Description field, enter a new name. For our example, we will enter Evaluations.

6. Click (Modify Record).

axiUm saves the changes.

Next, we will change the order of the tab displayed in the Personal Planner window.

7. Click Up.

axiUm moves the item up the list.

8. Click (Modify Record).
Setting up Personal Planner Tabs

axiUm saves the changes.

![Custom Reports Window]

9. Click [x] (Close).

axiUm closes the Custom Reports window.

You have now successfully modified the display options of a Crystal Reports file.

Deleting Custom Reports

▼To delete a custom report:

1. Go to Maintenance module’s System tab.
2. Double-click the Custom Reports icon.
axiUm version 5.0 displays the Custom Reports window. For information on the Custom Reports window, refer to the axiUm Reference Manual for Maintenance and see Custom Reports Window on page 821.

3. From the Type drop-down field, select Personal Planner.

4. From the list view, highlight an item. For our example, we will highlight Student Evaluations.

5. Click (Delete Record).
axiUm deletes the item from the list view.

6. Click (Close).

axiUm closes the Custom Reports window.

You have now successfully deleted a Crystal Reports file within a custom report category. The next time you open the Personal Planner module, axiUm deletes the tab from the Personal Planner window.

1.2 Setting up User Access for Custom Reports

Before you can grant user level access to custom reports, you must add custom reports. For instructions on adding custom reports, see Adding Custom Reports on page 5.

You can set up user level access for custom reports using one of the following methods:

- Custom Reports window
- Level Access window

This section describes both methods.
To set up user level access for custom reports using the Custom Reports window:

1. Go to Maintenance module's System tab.
2. Double-click the Custom Reports icon.

axiUm displays the Custom Reports window. For information on the Custom Reports window, refer to the axiUm Reference Manual for Maintenance and see Custom Reports Window on page 821.

3. From the Type drop-down field, select Personal Planner.
4. Select an item from the list view. For our example, we will select Evaluations.
5. Click Level Access.

6. From the list view, select an item. For our example, we will select **Dental Student**.

7. From the **Access** drop-down field, select an access level. For our example, we will select **Yes**.

8. Click 

   (Modify Record).

   axiUm saves the changes.

9. Click 

   (Close).

   axiUm closes the Report Access window.

You have now successfully granted user level access for a custom report using the Personal Planner View Access window. Users with this access level who are currently logged into axiUm will have access to this Personal Planner view record the next time they log into axiUm.
For instructions on granting user level access for a custom report using the Level Access window, continue reading the next procedure.

▼To set up user level access for custom reports using the Level Access window:

1. Go to Maintenance module’s System tab.
2. Double-click the Level Access icon.

axiUm displays the Level Access window. For information on the Level Access window, refer to the axiUm Reference Manual for Maintenance and see Level Access Window on page 830.

3. Expand the Custom Reports item.
4. Expand the Personal Planner item.
5. Highlight an item from the list. For our example, highlight Evaluations.
6. From the list view, select an item. For our example, we will select Dental Student.
7. From the Access drop-down list, select an access level. For our example, we will select Yes.
8. Click (Modify Record).
axiUm saves the changes.

9. Click (Close).

axiUm closes the Level Access window.
You have now successfully granted user level access for a custom report using the Level Access window. Users with this access level who are currently logged into axiUm will have access to this custom report the next time they log into axiUm.
This chapter covers the tasks you can accomplish using the Personal Planner module.

This chapter covers the following topics:

- Searching patient activity records
- Printing reports

At the end of this chapter you will be familiar with these tasks.
1 Searching Patient Activity Records

To search for patient activity records:

1. Select the Lists tab.

2. Click on a tab. For our example, we will click **Assigned Patients**.

3. Enter the fields and options. For our example, we will enter:
   
   - **User**: Caan, David
   - **Date From**: 10/11/2009.
   - **Date To**: 30/06/2011.

4. Click (Search).
axiUm displays all items that match the search criteria.

You have now successfully found patient activity records in axiUm.

2 Printing Reports

▼To print a list of patient activity records:

1. Search for patient activity records.

   For instructions on searching patient activity records, see Searching Patient Activity Records on page 18.

2. Right-click anywhere in the list view to display the Print List option.

3. Click Print List.
axiUm displays the Select Printer window.

4. Highlight an item. This is the printer you want to print to.

💡 You can print to file by selecting the Print to File checkbox. When you click OK, axiUm prompts you to browse to a directory to save the file.

5. Click Select.

axiUm prints all the items on the list to the selected printer, similar to how they appear on the Personal Planner window’s selected tab’s list view.

You have now successfully printed a list of items.

You can print any custom reports displayed in the custom tabs. For information on printing these reports, refer to your Crystal Reports help file.