Visibility: Region

Merlin 2.3.58 - Release Note

What is Region Visibility?

Region Visibility is the evolved visibility and accessibility model of User Visibility (used in Voyager and Merlin) which adds greater control and flexibility which will suit larger vet groups. Both User Visibility and Region Visibility are available within the Merlin PMS.

The User Visibility model required each user to be assigned a list of sites they can access (login) and then view (after login) which can vary user to user. The limitation of this model is that a user could login to a site and record work at a site they don't need to log in to, they however only need to view the clients registered to other sites; the new Region Visibility model supports restricted login options with greater visibility for the selected sites region.

What does that look like?

In the scenario shown in the fig1 below we have:

- 2 Regions
- 1 User with work access to 1 site in each region
- Region A has 3 sites
- Region B has 1 site

The user has been assigned 2 work sites, this means during login they can pick at which location they are physically working.

Unlike the User Visibility model, the user does not need to be assigned many sites just to see the client data as shown in Fig 3.

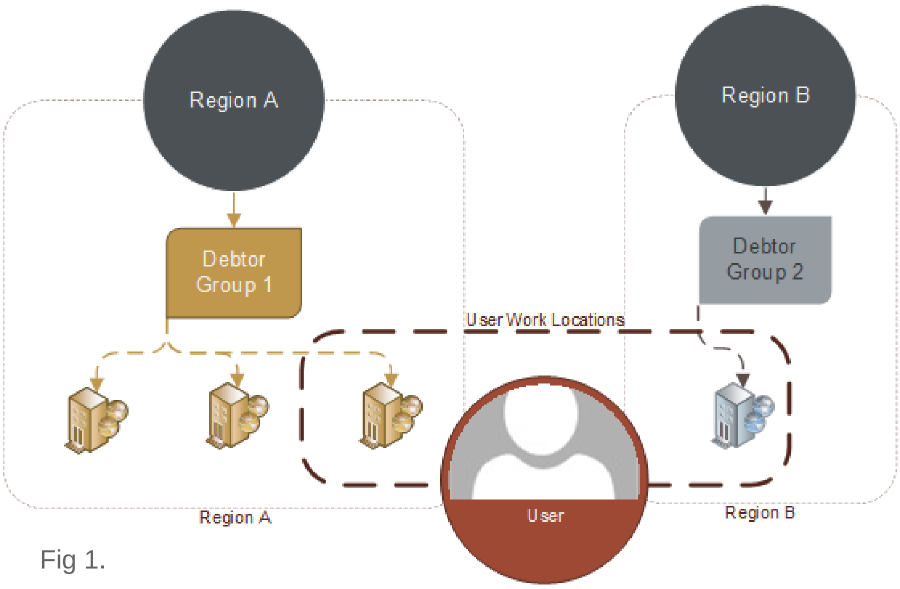

Fig 1.

Fig 2. Is showing the same setup for the user but under a single region. The user can login to 2 sites of the 3 under the region.

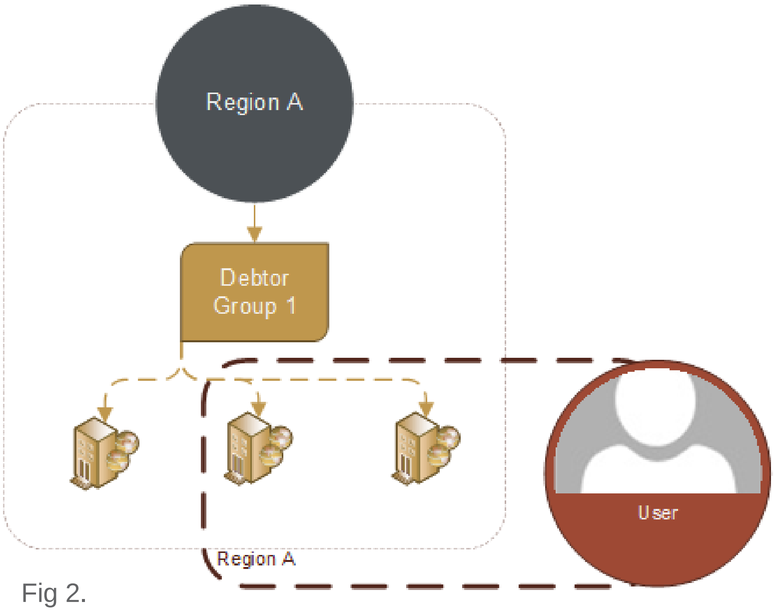

Fig 2.

In our scenario the user has select the site during login which is located under Region A.

This means that the user can see all clients, diaries, treatment and accounts for All sites within the region even though they couldn't log into all sites in Region A.

Because the user is logged into Region A, they cannot see any clients, diaries, treatment or accounts for any sites in other regions even if they have access to them.

To see clients for another Region the user must log out and start our scenario again.

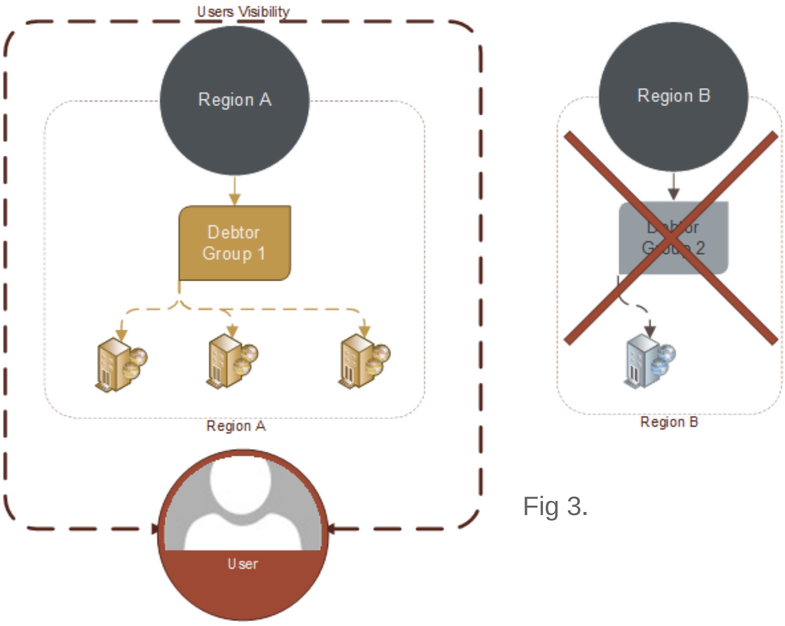

Fig 3.

Can I exclude viewing a site in a region for some users?

You can choose to not allow a user visibility of the client and related data of selected sites within a region. This is done during user setup or via the User/View Sites library.

In this new scenario, the user is provided work site access to Site 1 and has been excluded from viewing Site 3. This means when the user logs in they can view Site 1 and Site 2 only.

This has been put in place for the special circumstances where you may have a referral or specialist unit where clients and related data should not be available to all staff but where staff working in these sites need access to client records registered to other sites.

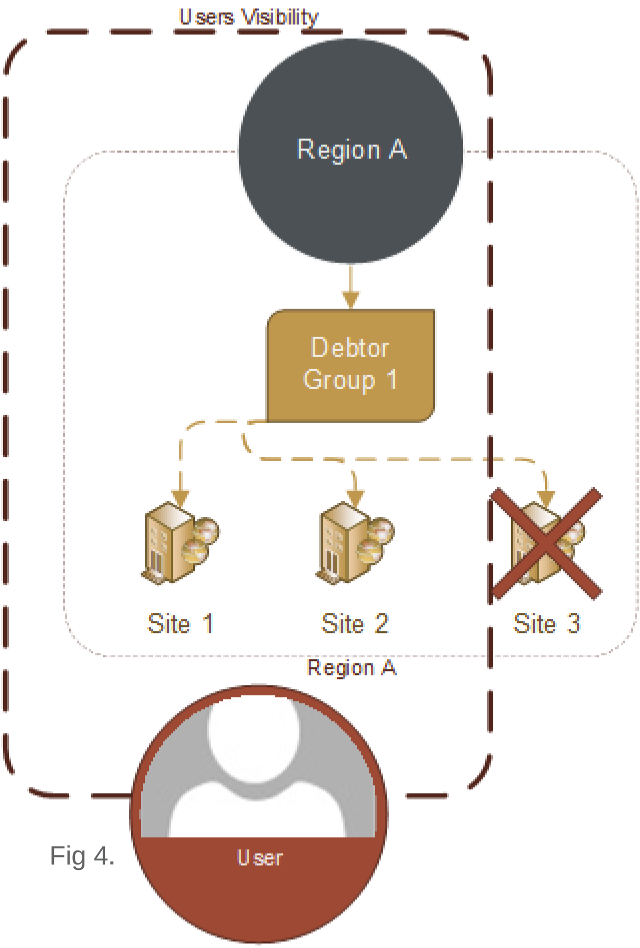

Fig 4.

How do I switch to Region Visibility from User Visibility?

Please contact your Business Development Manager to arrange for one of our Implementation Consultants to discuss your requirements and if this change is best suited for your business.

There will be several steps involved:

1. Creation of a new “main site” dedicated to administration and reporting tasks.
2. Assignment of Sites to Debtor Groups (most businesses will have 1)
3. Assignment of Debtor Groups to Regions.
4. Setup of users’ Work Sites and View Sites permissions.

How flexible are regions?

Regions allow a greater control of what data is shown and when, therefore a user who works in more locations than other users will now see the same clients and only the clients registered within the region selected when logging into Merlin.

If you have a business with a variety of different potential configurations the region model allows many setups as shown in Fig 5. Each region can have 1 or more Debtor groups which can contain 1 or more sites.

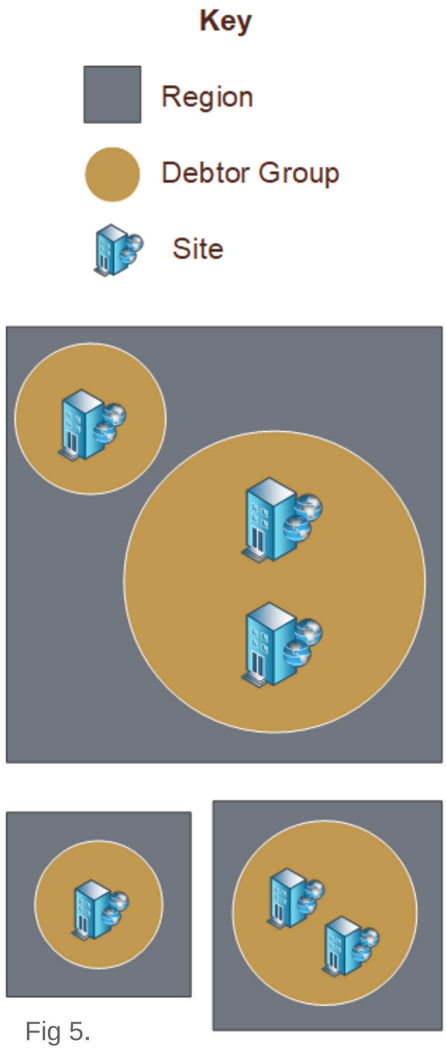

Fig 5.

What are debtor groups?

Debtor Groups are not directly related to this Visibility model however are used to assist with grouping within a single region.

Debtor Groups allow for the debtor screen to calculate where the debt was created rather than assign back to the clients registered site to chase debt. This debtor mode is called “Debt by Work Site”, and this is not required to use Region Visibility.

What is an Administration Site and What can it do?

An administration site is a special site which sits outside of any region, this is usually the “main site” which all price deviations and composites are shared from. If you are switching to Region Visibility after your system Go Live, this will need to be created specially by the MWI Animal Health team.

An administration site has no access to Reception Client or Patient records, Accounts, Treatment, Reminders or Diary. The Administration site does allow visibility of all sites within Merlin allowing for running of reports, debtors, stock movement, report wizard, etc across all sites; all other sites are contained within a region therefore limiting the scope of view.

How do I manage my Sites Regions?

A region must be created from the Regions library found under Administration > System > Sites > Regions.
Enter the name of the region as will be displayed through parts of the system.
Use the Save button to commit the changes.

A Debtor Group must exist for each region, the Debtor Groups library is found under Administration > System > Sites > Debtor Site Grouping.
Enter the name as will be displayed and select a region for each Debtor Group. You can assign more than 1 debtor group to a region.
Use the Save button to commit the changes.

The sites will now be assigned a Debtor Group and by relation the region.
In the Administration > System > Sites > Sites library, scroll right (about ½ the length of the scroll bar); under the Debtor Site Grouping column choose the Debtor Group for each site.
Use the Save button to commit the changes.

How do I manage user’s visibility and access?

Create a new user

Create the new user from the Security menu in Administration > System > Security.

Enter the required username, password, full name and surgeon requirements, this has remained unchanged.

Assign the user the required rolls on the next page.

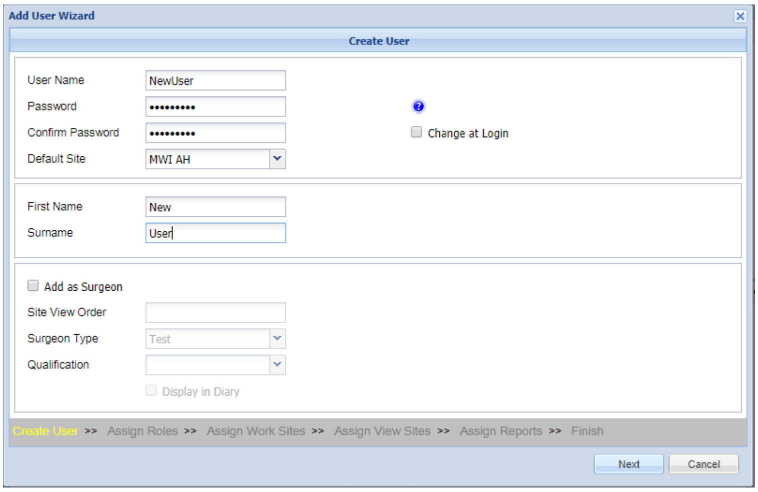

Fig 6.

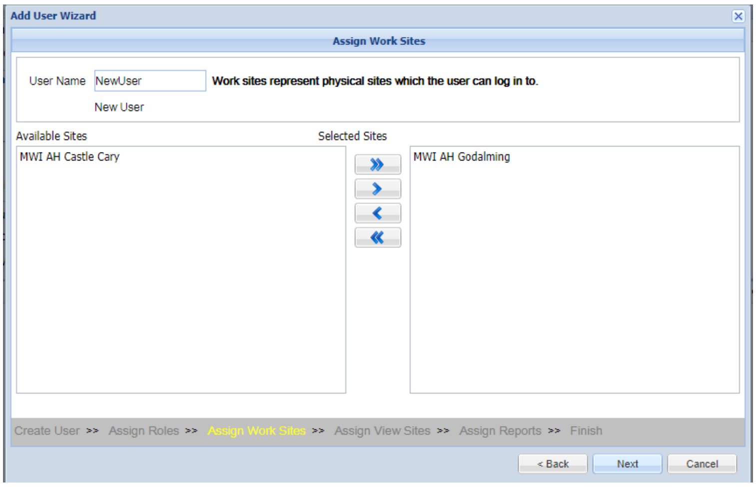

Fig 7.

On the Assign Work Sites te users default site will be automatically selected. This page controls which sites a user is allowed to log in to.

If you are logged into a site that is part of a region, you will only see sites apart of that region. To see all sites (multiple regions) you must create the user under the Administration site.

With all the required sites selected, continue to the next page.

On the view sites page all sites are automatically selected which are within the region(s) of the selected work sites from the previous page.

If the user requires no viewing rights for a particular site then remove the site here.

See Fig 4 for a visual representation.

In most cases you will want to leave all sites selected and continue by pressing Next.

The next screen you will assign the reports to the user, the reports are no longer automatically assigned to new users.

Continue to the confirmation and creation of the user.

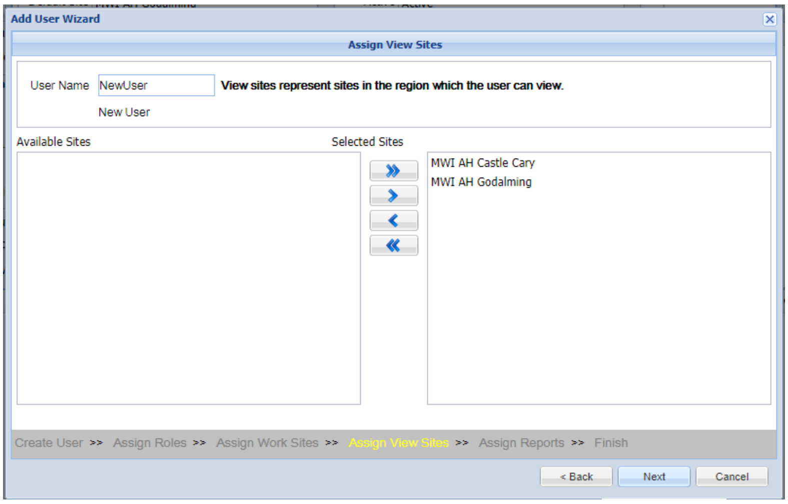

Fig 8.

Managing Existing Users

The existing library User/Sites has been split into 2 new libraries under the Region Visibility model, under the menu Administration > System > Users you will see the options Users/Work Sites and Users/View Sites.

These 2 libraries mirror the behavior in the create user wizard; both libraries also allow you to manage by User or by Site.

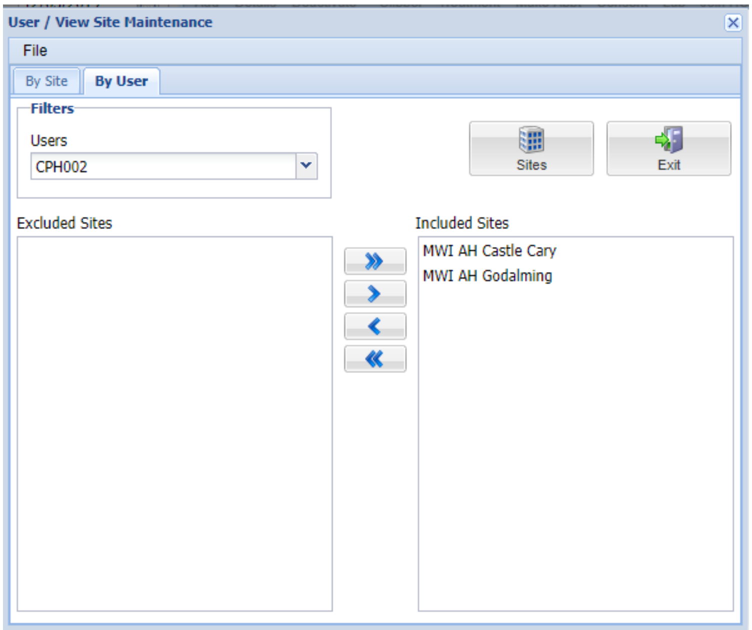

Fig 9.