

CAPTIV8[®]

User Guide

Software Version 3.5

Optimed Limited

10/19/2015

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Contents

About This Document.....	3
Installing CAPTIV8 Software (PC).....	3
REQUIREMENTS.....	3
SOFTWARE INSTALLATION (USB).....	3
SOFTWARE INSTALLATION (ONLINE DOWNLOAD).....	4
iPad Installation.....	5
iPad Instructions.....	7
Online Account Setup.....	7
CUSTOMIZE YOUR ONLINE ANIMATION RESOURCE.....	8
CAPTIV8 Overview.....	9
Chair-side Module.....	9
MAIN SCREEN.....	10
DRAWING.....	11
SHARING ANIMATIONS.....	11
SENDING SURVEYS.....	14
SWITCHING CHAIR-SIDE AND WAITING AREA.....	14
Patient Education Centre.....	15
The Management Area.....	16
INTRODUCTION.....	16
The Company Management Area.....	16
THE DASHBOARD.....	16
OFFICES / PRACTICES.....	17
Overview.....	18
Edit.....	18
Delete.....	19
PLAYLISTS.....	19
DEVICES.....	20
Add a New Installation (or Device).....	21
PEOPLE.....	22
Documents.....	23
Captions.....	23
Subscription.....	23
Settings.....	23

The Practice Management Area	25
PRACTICE OVERVIEW.....	26
ANIMATION LIBRARY	28
Embed (Animation on your Website)	29
Customize (Animation Description).....	31
Send (Email campaigns).....	32
PEOPLE.....	33
MEDIA CENTRE / CONTROL PANEL.....	34
Main Menu	34
Customize Zone	35
SCHEDULER.....	39
SETTINGS (PRACTICE SETTINGS)	40
SURVEYS	41
Create a New Survey	43
Support	46
Trademarks.....	46

User Guide

About This Document

This document will:

1. Guide you through the Installation process of CAPTIV8 software for the PC (v3.5.1) and iPad (v3.4).
2. Guide you through all the aspects of the Company and Practice Management pages.

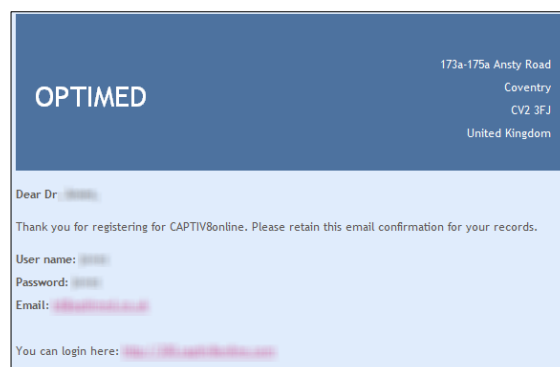
Installing CAPTIV8 Software (PC)

REQUIREMENTS

1. A computer running Windows 7,8 or 10.
2. 4GB RAM
3. Processor: at least i3
4. PC should have a dedicated graphics card capable of at least 1280x720 resolution compatible with the display screen.
5. 15GB of free space on the PC hard drive.
6. USB drive port
7. Active and fully functioning internet connection. CAPTIV8 software has been tested on the above specification. The software has been compiled free of any known viruses or malware. Optimed accepts no responsibility for any damage to hardware after installation.

SOFTWARE INSTALLATION (USB)

Before installing the software make sure you have the CAPTIV8 Welcome email. The fastest, most convenient way to install CAPTIV8 on your PCs is by using the CAPTIV8 USB

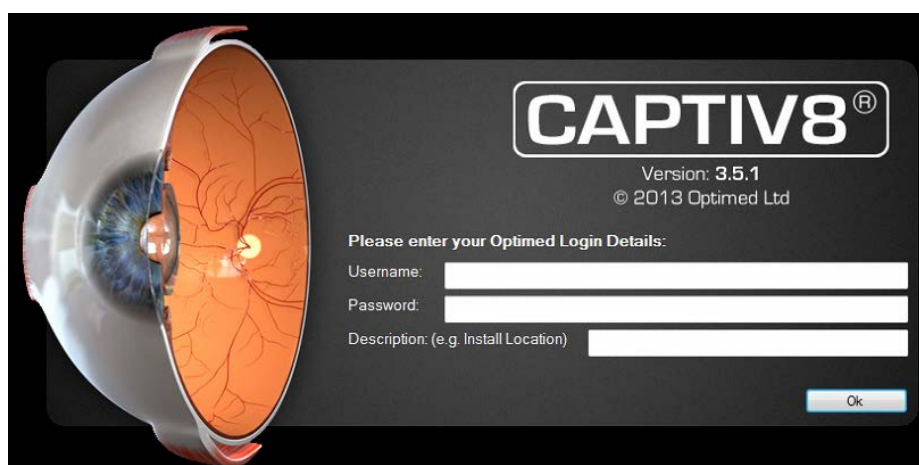


drive that contains version 3.5.1 release of the software.

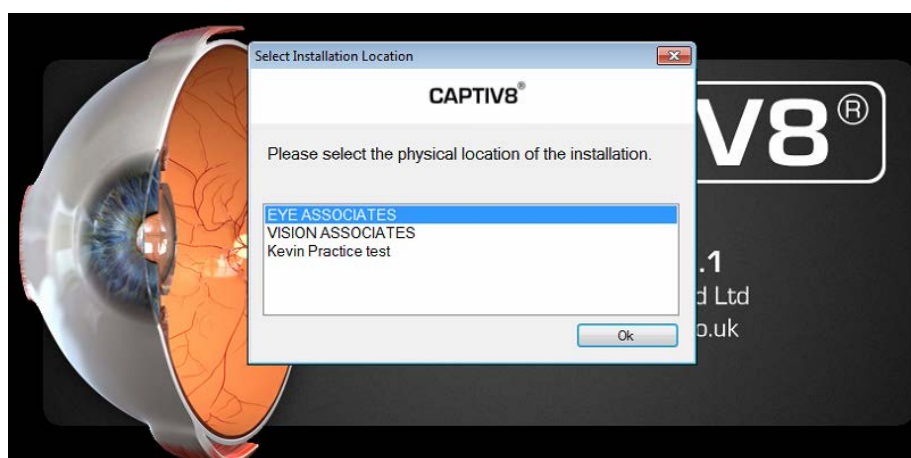
Switch on the PC you wish to install CAPTIV8 on and insert your memory stick.

1. To install / run /uninstall you must be logged in as the same user. That user MUST be a member of the local machine 'Administrators' group.
2. To install it, double click on Setup.exe.
3. Follow the on-screen instructions to complete the installation.

4. Make sure your PC is connected to the internet and then double click on the CAPTIV8 icon on the desktop.
5. You will be asked to enter your username and password that is provided in the Welcome email in order to activate the program. Furthermore, you must enter the description of the installation e.g. waiting area PC.



6. If you have added multiple practices to your account you will be asked to select from a list of practices where this installation is located. The CAPTIV8 program will start and complete the installation from the USB drive.



7. CAPTIV8 will then proceed to download the very latest updates (Internet connection required). This will be performed silently in the background. After this update is completed you will see your company name displayed at the top left of the CAPTIV8 chair-side program. You may use CAPTIV8 as normal during this process.

SOFTWARE INSTALLATION (ONLINE DOWNLOAD)

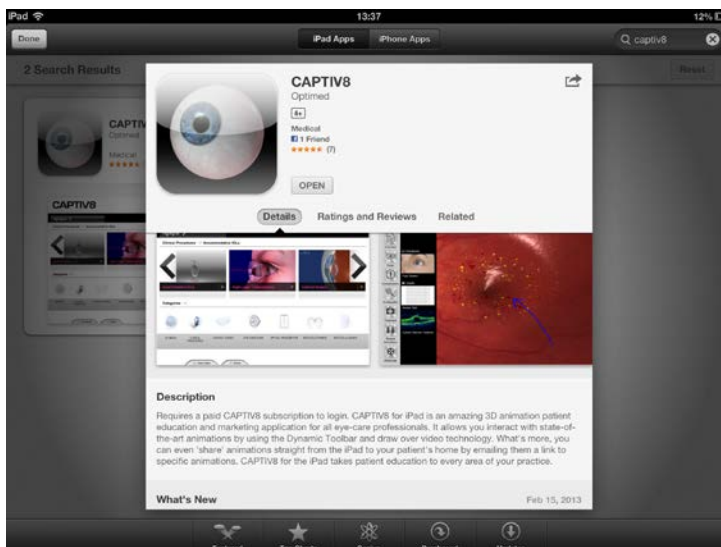
Although CAPTIV8 can download all media files through the internet, this process requires considerable time and it is recommended that you install using the USB installer.

1. Within your welcome email there will be a hyperlink to download the file captiv8.zip (that also has this Installation Guide as an attachment). Download and copy it to a memory stick. Right click the CAPTIV8.zip file and click on 'Extract here'.
2. Switch on the PC you wish to install CAPTIV8 on and insert your memory stick.

3. To install / run /uninstall you must be logged in as the same user. That user MUST be a member of the local machine 'Administrators' group.
4. To install it simply double click on Setup.exe.
5. Follow the on-screen instructions to complete the installation.
6. Make sure your PC is connected to the internet and then double click on the CAPTIV8 icon on the desktop.
7. You will be asked to enter your username and password that is provided in the Welcome email in order to activate the program. Furthermore, you must enter the description of the installation e.g. waiting area PC.
8. If you have added multiple practices to your account you will be asked to select from a list of practices where this installation is located. The CAPTIV8 program will start and complete the installation from the USB drive.
9. Leave the program to start downloading the updates, this will take quite some time.

iPad Installation

Go to the App Store on your iPad. Search for CAPTIV8 and download the CAPTIV8 iPad application. Note, do NOT install CAPTIV8 Lite. This release of CAPTIV8 includes all the media files as of 25th July 2015, any subsequent updates will download through the internet (ensure you have a Wifi connection).

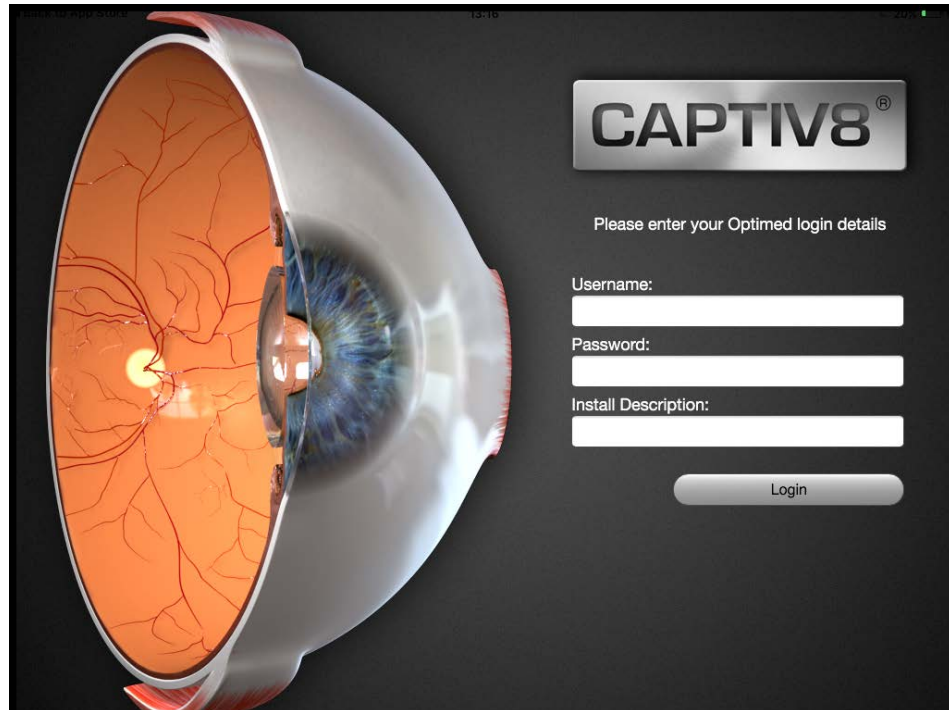


BEFORE INSTALLING PLEASE ENSURE THE FOLLOWING STEPS ARE PERFORMED:

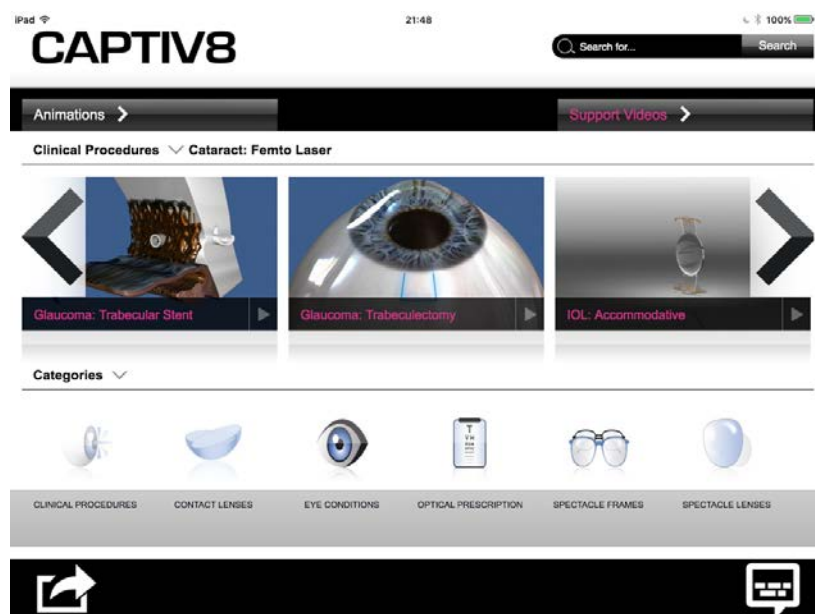
1. Connect iPad to power source
2. Ensure it connected to a stable WiFi connection
3. Ensure that it does not auto-lock. To disable this go to your home screen and select 'Settings' then 'Auto-Lock select 'Never'
4. Download the App

Activate your device by following these instructions:

1. Launch the CAPTIV8 iPad application. The first time you run it you will see the following screen shot below.
2. Enter your Username and Password as found in the welcome email. Provide a description of the device e.g. 'John's iPad'
3. You will then see a message that says 'Verifying your login details...' This can take between 30 seconds and 2 minutes.



4. Your iPad will then begin to unpack the media files, this is shown below. It can take 1-3 minutes.
5. After this, the program will download latest updates, a progress bar will indicate how has downloaded. Once completed you will see the main CAPTIV8 screen (below).



iPad Instructions

The iPad CAPTIV8 interface is the same as the PC. Please view the support video on the iPad (click on the support video tab at the top right of the iPad). Then in the search bar type 'controls'. Click on the video image to play the video.

Online Account Setup

Your online animation resource allows patients to see animations through a fully branded website in their home after you share content with them via email. CAPTIV8 allows you to fully customize the online animation resource with your practice details, logo and colour. This section describes how to customize this area.

1. After you have signed-up for CAPTIV8 you will receive the Welcome email detailing your username and password to access your management area, a link to your online management area and also activation keys for your devices (PCs or iPad).
2. Sign in to your CAPTIV8 account by clicking on the URL in your welcome email. The first page that is shown is the Dashboard.
3. A default practice is already added (it is the same as your Company name as entered when you signed up).
4. Create a practice by clicking on '+ADD A NEW PRACTICE'

5. Fill in the fields as shown below and then click 'Save'.

YOU ARE HERE : SETTINGS

SETTINGS

EYETECH OPTOMETRISTS: GENERAL SETTINGS

FIELDS MARKED * AS REQUIRED

* Company name	Address 1
<input type="text" value="EYETECH OPTOMETRISTS"/>	<input type="text" value="175 Ansty Road"/>
Website	Address 2
<input type="text" value="www.2020eyes.co.uk"/>	<input type="text"/>
Facebook e.g. http://facebook.com/optimeduk	City
<input type="text" value="http://www.facebook.com/2020ey"/>	<input type="text" value="Coventry"/>
Facebook Social Post Frequency	Postcode
<input type="text" value="1 / 8 Hours"/>	<input type="text" value="CV2 3FJ"/>
Twitter e.g. http://twitter.com/optimeduk	County
<input type="text" value="http://twitter.com/eyetechoptom"/>	<input type="text"/>
Twitter Social Post Frequency	Country
<input type="text" value="1 / 4 Hours"/>	<input type="text" value="United Kingdom"/>
YouTube Channel Name	Telephone
<input type="text" value="EYETECHOPTOMETRIST"/>	<input type="text" value="024 76444566"/>
Allow local file attachment	Fax
<input type="text" value="Yes"/>	<input type="text"/>
Company description <div> Stylish, modern practices with cutting edge technology. Our objective is to look after your eyes in the best environment with the best eyecare using only the best products with friendly, caring staff. </div>	
<input type="button" value="SAVE"/> OR CANCEL	

SETTINGS

Use this area to customise the appearance of your website.

PRACTICE MANAGEMENT API

Your company can send 1000 email reminders through CAPTIV8 per month. This month your company has sent 1.

HELP

Click 'Save' to update the settings.

CUSTOMIZE YOUR ONLINE ANIMATION RESOURCE

1. Click on the 'Settings' link in the top menu when you are on the Dashboard.
2. Click on 'Appearance'
3. To add your logo, simply click on the 'Browse' button to upload your logo. Please ensure your logo is correctly sized to 223x64 pixels and in jpeg format.
4. To change the colour of your online resource simply select the colour from the drop down menu that most resembles your brand.
5. If you have multiple languages in your account you can also select the default language that will be displayed in your online animation resource.
6. Click save.
7. More detailed information can be found on p24.

YOU ARE HERE : SETTINGS

SETTINGS

OPTIMED: APPEARANCE SETTINGS

FIELDS MARKED * AS REQUIRED


Default Language


Allow Language Selection

Time format

Home Page Layout

Online Animation Page Skin

Practice logo


New logo
 No file selected. 

Email Background Colour

Email Header Background Colour

Email Page Background Colour

Email Header Text Colour

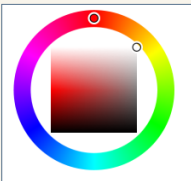

Email Page Text Colour

Email Footer Text Colour

Email Link Colour

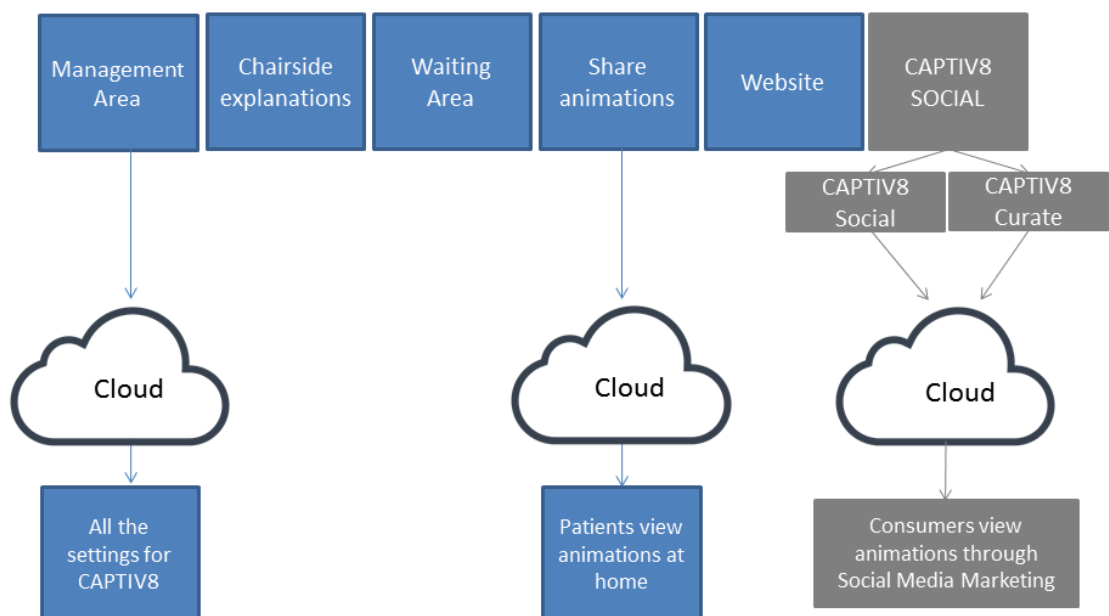
SETTINGS

Use this area to customise the appearance of your website.

CAPTIV8 Overview

CAPTIV8 offers modules for communication and marketing. The schematic below shows how the various modules are used. The rest of this document details each of these areas. If you have optionally subscribed to CAPTIV8 Social, this will be discussed in a separate document.

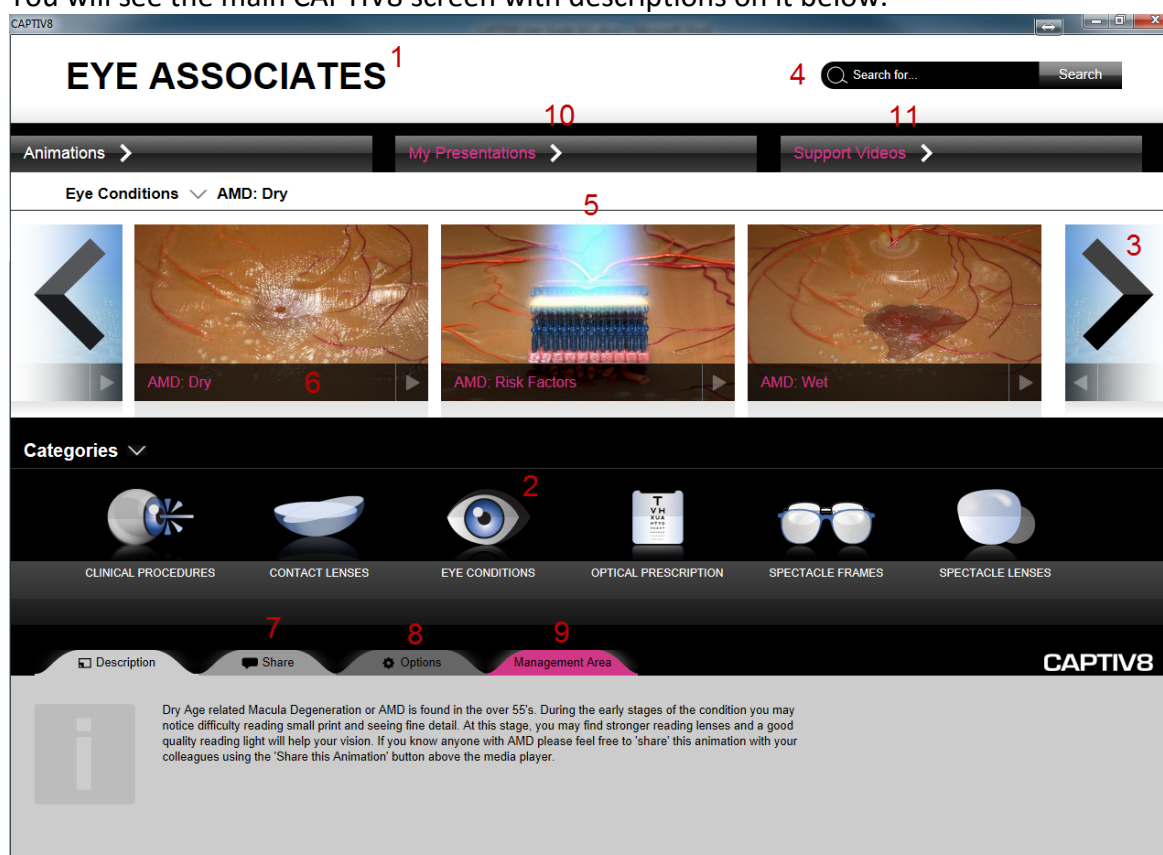


Chair-side Module

To start the CAPTIV8 chair-side module, double click on the CAPTIV8 icon on your desktop.

MAIN SCREEN

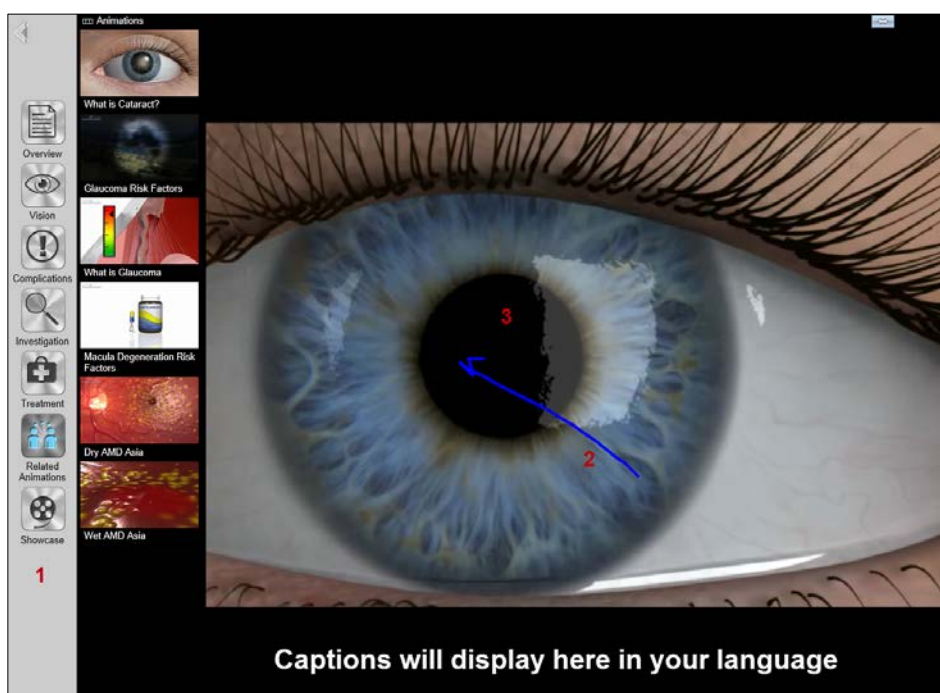
You will see the main CAPTIV8 screen with descriptions on it below.



1. Your company name will be visible shortly after the CAPTIV8 software has downloaded the latest updates from the server.
2. Click on any of the animation **Categories** to move to another set of animations.
3. Use the arrows to scroll through the animation **Carousel** in a particular category.
4. You can search for animations using the quick search box.
5. Click on the **Animation image** to start the animation in full screen.
6. Clicking on the **Animation name** text changes the description in the 'Description' tab. You can then share this animation without having to view it.
7. Click the **Share tab** to share an animation with your patient.
8. The **Options tab** allows you to switch from Chair-side to Waiting area if your device was installed with 'Both' waiting area and Chair-side. If your device is set only for Waiting area then the waiting area will start in full screen playback automatically. If only Chair-side mode is selected then the options tabs will not be visible (see 'Devices' page 20). If you have multiple languages purchased in your system, you can also switch languages on the fly.
9. This is a link to your company management page.
10. You can create your own presentations where individual animations play one after another. This is ideal if you want to explain a problem and then a treatment. My Presentations will only show after you have published a 'My Presentations' playlist from the media centre.
11. Support videos contains a series of support videos.

DRAWING

To access drawing mode, click on the image of the animation in the animation carousel. You will then see the screen below:



1. This is the **Dynamic Toolbar**. To open it, click on the arrow to the left of the screen to activate the toolbar. The toolbar segments animations and also links related animations so you can dynamically change your communication according to each individual patient and according to the amount of time you have available.
2. You can draw over any area of the video - just click and hold the left mouse button and drag the mouse to draw. Double click the left mouse button to wipe the drawing and continue playing. You can also use the spacebar to play and pause the video.
3. You can exit from the drawing mode by pressing the <ESCAPE> key on your keyboard.

SHARING ANIMATIONS

To share content with a patient, click on the Animation name (below the animation image). This will change the description to that particular animation. Then click on the Share tab and then click Share this Animation. You will then see the screen below:

Refractive: Epi LASIK + 5

Your name
 Dr. Dave 1

Your email
 reception@2020eyes.co.uk 2

Their title

Their first name

Their last name

Their email

Message
 Dear !Patient.title! ! Patient.lastname! 3
 Thanks for your visit to our practice. I thought you may find this information useful, it is a 3D animation on ! Animation.name!. Just click on the 'view animation' link below and it will show up in your web browser.
 Feel free to 'share' it with anyone you may feel would benefit from viewing it.

Message template
 Eye Information 4
 No template used
 Eye Information
 Hi-index Lenses
 Multi-share
 New Contact Lenses
 Prescription Taken

SHARE

1. Click the 'Your name' drop down to find users in your account.
2. Your email will automatically be populated when you select 1. However, you can manually edit it if you wish.
3. You can either type in your own personalised message or alternatively select from the template messages in 4. Note you can also create customized templates from your management page for all or even specific animations (see page 32).
4. Select a message template from the drop down menu.
5. Click on the '+' (Multishare) icon to create a personalized playlist of animations. This is particularly useful if a patient needs to be informed about more than one topic.

Refractive: Epi LASIK - 6

7

8

Clinical Procedures Animations

☐ Lids: Microwavable Compresses

☐ Lids: Muscle Relaxing Injections

☐ Optomap Flashes & Floaters

☐ Optomap Retinal Exam 9

☐ Refractive: Bladeless LASIK

☐ Refractive: ICL

☐ Refractive: LASIK

☐ Retina: Intravitreal Injections

You have selected

☒ Refractive: Epi LASIK

☒ IOL: Piggyback

☒ Refractive: LASEK 10

☒ Refractive: RLE

SHARE

6. Click on the '-' icon to return to the previous screen.
7. Click the animation category icon to find additional animations to share.
8. You can even share a YouTube video from your own YouTube channel which will play within your branded Patient Education Centre. Refer to p24 for details on how to synchronise your YouTube channel with your CAPTIV8 account.

9. Click the check box next to each animation you want to add to your personalized playlist. It will then appear the area to the right.
10. Shows animations that will play. You can reorder them by dragging and dropping in order to change the order of playback. You can share a maximum of 5 items.

Click the Share button below the message templates drop down and an email will be sent to your patient. A confirmation message will also be displayed.

Patients will receive an email like the one below:

1. The message contains the message template (if selected).
2. There is a link (view this animation) in the body of the email. Clicking this will automatically launch a web browser and connect to your branded online patient education centre. The patient will see this particular animation play, however, they can also access other animations.
3. There is an 'unsubscribe' button for patients to opt out of receiving further emails from you. This is a legal requirement. The CAPTIV8 system will then prevent you from sending emails to the patient again. There is also a 'Privacy Policy' to inform the patient how their data is used.



Recording of Patient Data

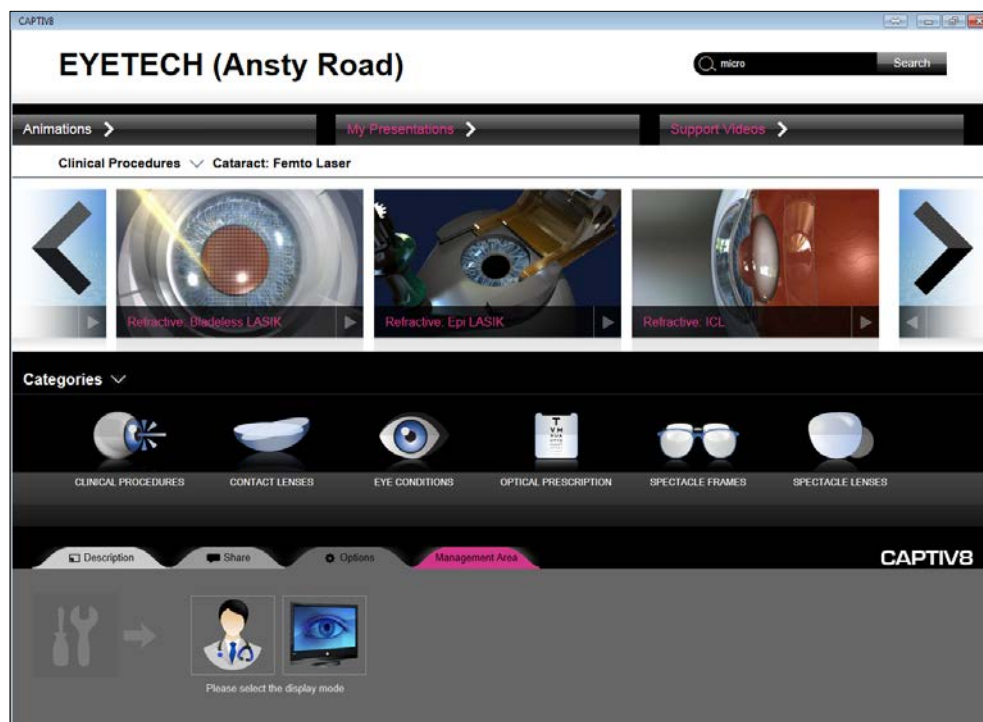
The CAPTIV8 system does not save any patient data within the server. Patient emails are only recorded when they elect to opt out from receiving further communication from the practice.

SENDING SURVEYS

To send a patient a survey, click on the Share tab and then click Send Survey. Sending surveys is similar to sharing animations (above). Note that you can create customized surveys from your management page 43.

SWITCHING CHAIR-SIDE AND WAITING AREA

If you have both chair-side and waiting area modules installed on your device, you will see the Options tab. Click on the tab and you will see the screen below:



If you click on chair-side then the program will always start with the chair-side module. If you click waiting area, CAPTIV8 will immediately start to play your waiting area playlist. If you have not published a playlist to your installation or device, then you will see a blank screen with a message 'Please Publish a Playlist'.

To exist the waiting area playback screen press the <ESCAPE> key. If you close the program and then restart it, CAPTIV8 will then start in waiting area mode automatically. To change to Chair-side you must go to the Options tab and select Chair-side.

Patient Education Centre

The online branded Patient Education Centre is viewed after patients click the 'view this animation' button in the shared animation email. A sample of the online patient education centre is shown below:

1. Your logo. You can add this from your management system (see page 8).
2. A link to your website.
3. A description or mission statement about your company.
4. The animation window.
5. Appointment request feature. It allows new visitors to your online animation resource to request an appointment with your practice. Note that this is not an online patient appointment diary. When an appointment request is made, your practice will be sent an email informing you of the patient's details and their requested time (and any other message they have written). The patient is also sent a message from the practice informing them that the request has been received and that someone will contact them in order to confirm the appointment. This feature is activated and deactivated from the practice management area (see page 40).



6. The Web Genie. The first time a patient accesses the online animation resource, the web genie will appear at the end of the animation and ask patients to share the animations with their friends (thereby recommending your practice), she will also ask new visitors to consider requesting an appointment. Note that the web genie can be switched off from your practice management area (see page 40).

7. The Facebook 'Like' and Twitter 'Tweet' integration means that patients with a Facebook or Twitter account can simply click the button and recommend you. If a patient clicks the 'Like' button (and they are logged into their Facebook account), then a message is posted on their wall with a single click. The message looks like this:



notice that with only a single click of the 'like' button the patient's Facebook page has a post that includes a image of the animation, a description of the animation and a link to that animation that Facebook 'Friends' of the patient can access (by clicking on the image or animation title).

8. If your practice has a Facebook and Twitter page then you can encourage patients to become 'Fans' by allowing them to visit your page and grow your fan base. This is useful when you want to create marketing campaigns through Facebook and Twitter and also keeping patients informed about what your business is doing. See p24 for more information on how add your Facebook & Twitter page.
9. Your practice address.

The Management Area

INTRODUCTION

The Management area is divided into 2 key areas:

1. The Company Management Area
2. Practices (or Offices in USA) Management Area

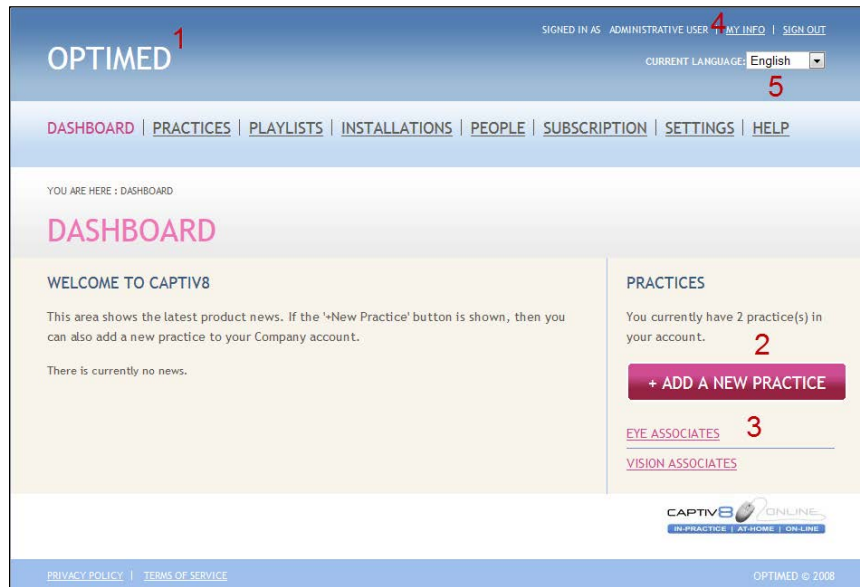
The Company is the organisation that has purchased the CAPTIV8 license. The Company may have many practices or offices. There are 2 ways to login to your management page:

1. Click the link in the Welcome email
2. After you have installed CAPTIV8 onto your computer you can access the management area from the Management tab.

The Company Management Area

THE DASHBOARD

After you have logged in you will see the following screen:



The Dashboard is shown to Company Admin users and Account owners. It shows company specific information.

1. Your company name
2. If you have multiple practices in your account then you can add your practice/s. Each practice has a separate online patient education centre so that patient recommendations can be directed to the correct practice or office. For every 10 installations you can add 3 practices.
3. Your practice/s is shown here. You can click this link to access your Practice Management Area.
4. The 'My info' area allows you to edit your information such username, password and email.

OFFICES / PRACTICES

This area allows you to access the office or practice management area (overview), edit the practice information or delete the practice. A screen shot is shown below:

OPTIMED

SIGNED IN AS ADMINISTRATIVE USER | [MY INFO](#) | [SIGN OUT](#)

CURRENT LANGUAGE: English

[DASHBOARD](#) | [PRACTICES](#) | [PLAYLISTS](#) | [INSTALLATIONS](#) | [PEOPLE](#) | [SUBSCRIPTION](#) | [SETTINGS](#) | [HELP](#)

YOU ARE HERE : PRACTICES

PRACTICES

PRACTICES IN YOUR ACCOUNT

NAME	OPTIONS		
VISION ASSOCIATES	Overview	Edit	Delete
EYE ASSOCIATES	Overview	Edit	Delete

<< Previous >> Next

Page 1 of 1

PRACTICES

You currently have 2 practice(s) in your account.

+ ADD A NEW PRACTICE

Click 'Overview' to manage your practice

Click 'Edit' to update a practice's details

'Delete' removes the practice from the system - no undo!

Overview

Takes you to the practice management area (see page 26).

Edit

Allows you to edit and customize various elements that will display in the patient education centre. The screen shot below is labelled and the respective descriptions given below:

SIGNED IN AS ADMINISTRATIVE USER | [MY INFO](#) | [SIGN OUT](#)

CURRENT LANGUAGE: English

OPTIMED

[DASHBOARD](#) | [PRACTICES](#) | [PLAYLISTS](#) | [INSTALLATIONS](#) | [PEOPLE](#) | [SUBSCRIPTION](#) | [SETTINGS](#) | [HELP](#)

YOU ARE HERE : [PRACTICES](#) > EDIT PRACTICE

PRACTICES

EYE ASSOCIATES: EDIT DETAILS

FIELDS MARKED * AS REQUIRED

* Name

EYE ASSOCIATES 1

* Appointment email

support@optimed.co.uk 2

Telephone

+44 2476 444118

Fax

SAVE OR [CANCEL](#)

Facebook e.g. <http://facebook.com/optimeduk>

Twitter e.g. <http://twitter.com/optimeduk>

* Opening Times

9

:

00

am

5

5

:

30

pm

HELP

Click 'Save' to save the practice's details.

PRACTICE ADDRESS

173a-175a Ansty Road
Coventry, CV2 3FJ
United Kingdom

If there are any errors in the address, please email support@optimed.co.uk

ONLINE ANIMATION RESOURCE URL 6

<http://220.294.captiv8online.com>

1. Enter the name of your practice or office.
2. Enter the Appointment email address if you want to show the appointment icon.
3. Enter your Facebook page address (optional). If you do not enter it then the Facebook page link on your patient education centre will not display.
4. Enter your Twitter page address (optional). If you do not enter it then the Twitter page link on your patient education centre will not display.
5. Enter your office opening and closing times. This sets the Scheduler start and end time for the waiting area module.
6. Shows the URL for your online patient education centre.

Delete

You can delete the practice but be careful once deleted it cannot be retrieved. You can however create another one.

PLAYLISTS

The playlists area in the Company management area allows you to publish a playlist created in the media centre to all installations over all practices. You can publish waiting area playlists or chairside playlists that display in the My Presentations area.

19

SIGNED IN AS ADMINISTRATIVE USER | [MY INFO](#) | [SIGN OUT](#)

CURRENT LANGUAGE: English

[DASHBOARD](#) | [PRACTICES](#) | [PLAYLISTS](#) | [INSTALLATIONS](#) | [PEOPLE](#) | [SUBSCRIPTION](#) | [SETTINGS](#) | [HELP](#)

YOU ARE HERE : MY PRESENTATIONS PLAYLISTS

MY PRESENTATIONS PLAYLISTS

PLAYLISTS IN YOUR ACCOUNT

NAME	PRACTICE
<input type="checkbox"/> IOL Options	EYE ASSOCIATES
<input type="checkbox"/> Kamra Inlay	EYE ASSOCIATES
<input type="checkbox"/> Keratoconus & RGP Lenses	EYE ASSOCIATES
<input type="checkbox"/> Keratoconus & Treatment	EYE ASSOCIATES
<input type="checkbox"/> Large Diameter GP	EYE ASSOCIATES
<input type="checkbox"/> Multifocal Contacts	EYE ASSOCIATES
<input type="checkbox"/> Multifocal IOL's	EYE ASSOCIATES
<input type="checkbox"/> Progressive Lenses	EYE ASSOCIATES
<input type="checkbox"/> UV & Sunglasses	EYE ASSOCIATES

PUBLISH

PLAYLISTS

Click 'Publish' to publish the playlist for multiple practices and installations.

LOCATION

My Presentations

DEVICES

The standard CAPTIV8 account comes with 10 license keys that allow you to activate 10 devices (either PCs or iPads). You can assign a device a Name, Location, and edit the device. The Installation or Device screen shot is shown below.

1. Practice: shows the license keys as assigned to specific practices or offices.
2. Location: shows the type of license (whether it is PC Chair-side, Waiting area, Both or iPad).

SIGNED IN AS OPTIMED | [MY INFO](#) | [SIGN OUT](#)

CURRENT LANGUAGE: English - North America

[DASHBOARD](#) | [OFFICES](#) | [DEVICES](#) | [PEOPLE](#) | [SUBSCRIPTION](#) | [SETTINGS](#) | [HELP](#)

YOU ARE HERE : INSTALLATIONS

INSTALLATIONS

INSTALLATIONS

NAME	1 PRACTICE	2 LOCATION	3 SECURITY KEY	4 OPTIONS
Amar iPad	EYE ASSOCIATES	Chairside	f64f86080af694b9	Edit
Amar offline installer test	EYE ASSOCIATES	Chairside	a9b6599254ec2cdc	Edit
Apple	EYE ASSOCIATES	Chairside	45f25cd76c07a287	Edit
Dr Dave	EYE ASSOCIATES	Both	9eb26053753ea16e	Edit
John G Kelly	EYE ASSOCIATES	Both	06f72290223320de	Edit

<< Previous Go to page: [1](#) [2](#) [3](#) [4](#) [5](#) >> Next

Page 1 of 5

INSTALLATIONS

Your companies subscription allows you to have a total of 30 installations, this subscription has 9 slots available.

5

+ ADD A NEW INSTALLATION

Click 'Edit' to update a installation's details

3. The security key shows the activation key for your device.
4. You can edit each installation by clicking 'edit'. Here, you will be able to rename the installation and assign it to another practice. Assigning the installation to another practice or office means that when you share an animation with your patient, it will send the animation link to the online patient education centre from a specific practice or office in your account.
5. If you click 'Add new installation' or 'Add New Device' then you will be able to associate a new device or installation to a spare license key.

Add a New Installation (or Device)

If you click add a new installation, you will see the screen shot below:

1. Enter the name of the installation or device; this can be the PC name or iPad name.
2. Select the practice or office you want this device to be associated with. As stated previously, associating a device with a particular practice means that any shared animations will be viewed on that particular practice's (or office's) online patient education centre.
3. Select the device type i.e. is it a PC or an iPad.
4. Select where the device is going to be used (only applies to PC installations). The options are Chair-side, Waiting area or Both.
5. If you have multiple languages, then select the language that should be used on the devices. Do not change this option once selected otherwise there device will need to download all movie sound and caption files from the server.
6. If you would like to have sound i.e. narratives then leave the option as 'Yes'.

OPTIMED SIGNED IN AS: OPTIMED | MY INFO | SIGN OUT
CURRENT LANGUAGE: English - North America

[DASHBOARD](#) | [OFFICES](#) | [DEVICES](#) | [PEOPLE](#) | [SUBSCRIPTION](#) | [SETTINGS](#) | [HELP](#)

YOU ARE HERE : [INSTALLATIONS](#) > EDIT DEVICE

INSTALLATIONS

ADD A NEW DEVICE TO YOUR COMPANY
FIELDS MARKED * AS REQUIRED

* Name **1**

Practice **2**

Device **3**

Location **4**

Default Language **5**

Sound **6**

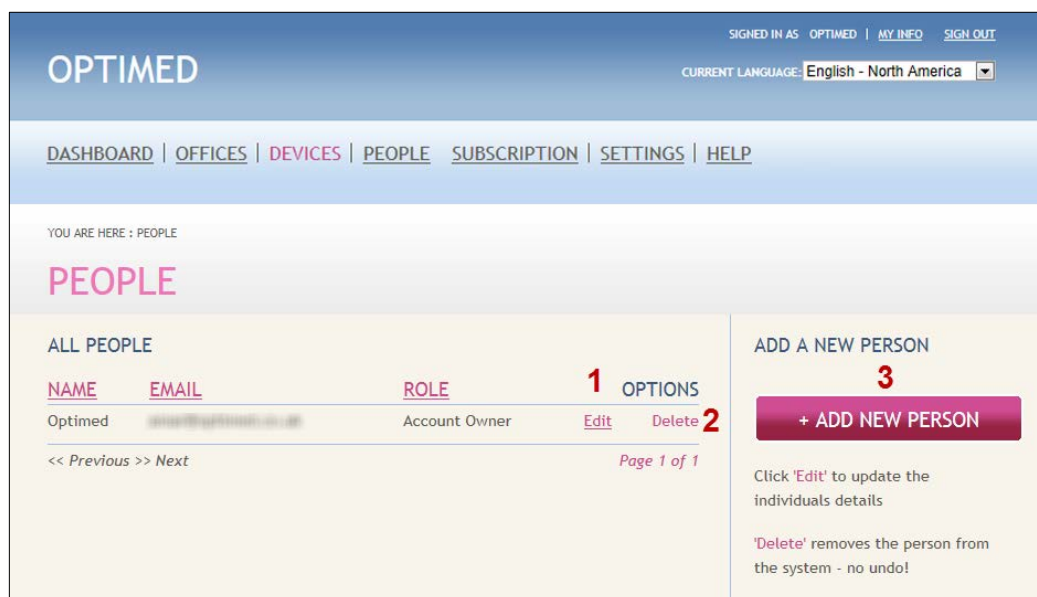
SAVE OR [CANCEL](#)

HELP
Click 'Save' to save the device's details

Once you have added an installation or device, you can use this key to enter in the license key area when installing the program (see page 3).

PEOPLE

The People section allows you to add users to your Company. You can add as many users as you wish. Users have different levels of access to your CAPTIV8 account. The screen shot of the People screen is shown below together with explanations.



1. Edit a user to change their name, email, role or practice that they are associated with. Changing the practice they are associated with will mean that emails sent from this user will be directed to that practice or office's patient online animation resource.
2. Remove a user by clicking the delete link.
3. Add a new user by clicking the add new user button.
4. Users that are added into the Company Management Area (except Admins) will be able to share animations on all devices in all practices. If you wish to add users who are only able to share on devices in specific practices, then ensure you add users in the PRACTICE Management Area (page 34).

Roles

Users can have 4 roles. These are described below:

Account Owner

This is the highest authority user. Only another account owner delete account owners. Account owners can access the Company management area as well as the Practice management area. Account owners will be able to send emails from all practice accounts.

Admin

The Admin can do everything the Account owner can do except delete an Account owner. Admins are not patient facing, therefore they will not show in the 'Your name' drop down list in the sharing area.

Practitioner & User

These roles do not allow the users access to the Company management area. The practice management area can be accessed but no settings can be changed. A Practitioner or User added in the Company Management Area will be able to send emails from all practice accounts.

A Practitioner will appear in the sharing area on the PC and iPad CAPTIV8 program however a user will not.

Individual's roles can also be changed within a practice by the admin or account owner, this is shown on page 33.

Documents

Add company documents that you want to be made available to users with CAPTIV8 installed on iPad and PC so that they can be shared with patients. This feature is useful to add a informed consent form or questionnaires.

Captions

If you prefer to change any of the captions or even add your own voiceover, click on CAPTIONS in the menu. You will see a list of all the animations. Select the animation you want to change the captions for. Simply type the new caption over the old one. If you want to revert to the original caption you can do so.

You may also upload your own voiceover. However, you will need to ensure that it is synchronised with the captions in an audio editing program. The easiest way is to finalise your captions and play them. Whilst playing, record you voice as you see the captions display. Again, you can revert to the original voiceover by deleting your audio file.

All saved captions and voiceover will download to your installations and also update the voiceover and captions on any animations embedded on your website.

Subscription

You can view your subscription and upgrade or renew your account from this section. You may want to upgrade your account if you want to purchase more installation or device keys. If you are a user in the United Kingdom, you will also be able to view your payments and print off invoices.

Settings

Enter your Company details in this General Settings.

1. Enter your website address. This will appear in the emails when you share an animation and also on the patient education centre so patients can access your website.

2. Enter your Facebook URL (copy it from the browser when you are on your Facebook page. If you leave it empty, no one will be able to 'Like' your Facebook page.
3. Enter your Twitter URL (copy it from the browser when you are on your Twitter page. If you leave it empty, no one will be able to 'Follow' your Company on Twitter.
4. Enter your YouTube channel name in the format shown. This can be a easy-to-remember name or it may be a long list of characters. You can find you channel name in the YouTube URL, for example for Optimed the channel URL is <http://www.youtube.com/user/OPTIMEDUK>, therefore you simply enter optimeduk.
 - a. After you enter the channel name you will need to confirm that you are the legal owner of the channel. If the channel does not belong to you, you mabe infringing copyright policy and may not be able to access certain videos. You can only enter the YouTube channel name ONCE so please ensure it is correct.
5. Enter a description of your Company (this will be displayed on the patient education centre).

DASHBOARD | PRACTICES | PLAYLISTS | INSTALLATIONS | PEOPLE | SUBSCRIPTION | **SETTINGS** | HELP

YOU ARE HERE : SETTINGS

SETTINGS

OPTIMED: GENERAL SETTINGS

FIELDS MARKED * AS REQUIRED

* Company name Address 1
 OPTIMED 173a-175a Ansty Road

Website Address 2
 1 www.optimed.co.uk

Facebook e.g. http://facebook.com/optimeduk City
 2 https://www.facebook.com/optim Coventry

Twitter e.g. http://twitter.com/optimeduk Postcode
 3 http://twitter.com/optimeduk CV2 3FJ

YouTube Channel Name County
 4 optimeduk West Midlands

Company description - English Country
 5 OPTIMED is a leading provider of 3D animation and communication platforms for eye-care professionals all over the world. United Kingdom

Telephone
 +44 2476 444118

Fax
 +44 2476 447365

SAVE OR **CANCEL**

SETTINGS

Use this area to customise the appearance of your website.

GENERAL SETTINGS

APPEARANCE

PRACTICE MANAGEMENT API

Your company can send 1000 email reminders through CAPTIV8 per month. This month your company has sent 0.

HELP

Click 'Save' to update the settings.

There is also another button - Appearance. Click on this area to customize the appearance of your online patient education centre –screen shot below:

1. If you have chosen multiple languages, then you can select the default language to display the narratives and captions for the online animation resource.
2. If you want to allow consumers on the online animation centre to choose languages click 'Yes'.

3. Time format the clock for areas such as the 'Scheduler' into a 12 hr or 24 hr time format.
4. Home page layout only applicable in UK if you subscribed to the home Page option.
5. The online animation page skin selector allows you to choose from 7 colours that most match your Company brand. The colour schema for the CAPTIV8 page can be changed at any time.
6. Click the 'Browse' button to upload your logo. Note that it should be jpeg or png format. Transparencies are only supported in png. The logo should be 225x65 pixels.
7. Once you have uploaded your logo, click the save button. Your logo will then be displayed in this area.
8. Delete your logo and only display your company name as text on the online education centre or emails that you share.
9. Customise each field in the email by clicking in the various fields (labelled email background etc). You can use the colour dial to create any colour you wish for each field.
10. If you want to match certain colours in your logo you can use the picker tool to match the exact colour for each field.
11. Preview your custom designed email.

[DASHBOARD](#) | [PRACTICES](#) | [PLAYLISTS](#) | [INSTALLATIONS](#) | [PEOPLE](#) | [SUBSCRIPTION](#) | **SETTINGS** | [HELP](#)

YOU ARE HERE : SETTINGS

SETTINGS

OPTIMED: APPEARANCE SETTINGS

FIELDS MARKED * AS REQUIRED

Default Language: English **1**

Allow Language Selection: Yes **2**

Time format: 12 Hours **3**

Home Page Layout: Layout 2 **4**

Online Animation Page Skin: Black **5**

Practice logo: **Optimed** **7**

New logo **6** No file selected. **8**

Email Background Colour: #FFFFFF

Email Header Background Colour: #adc0d7

Email Page Background Colour: #E0ECFC

Email Header Text Colour: #FFFFFF

Email Page Text Colour: #5D5955

Email Footer Text Colour: #5D5955

Email Link Colour: #CA488C

SETTINGS

Use this area to customise the appearance of your website.

GENERAL SETTINGS

APPEARANCE

PREVIEW EMAIL 12

10

11

Optimed

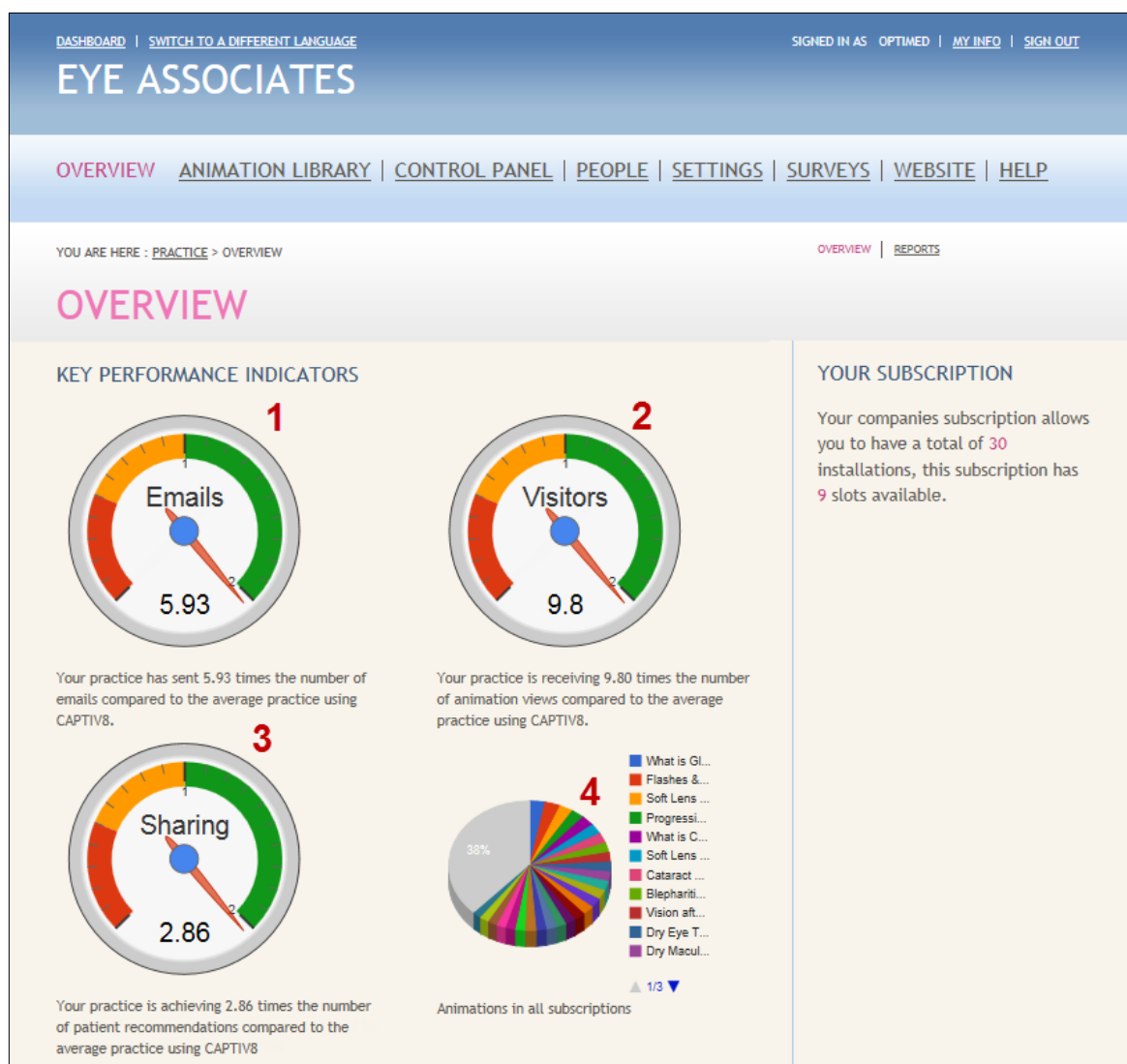
The Practice Management Area

Practice specific changes, performance indicators, templates and 3rd party integrations are possible by accessing the Practice Management Area. This area is accessed by clicking on the Practice name (located at the bottom right of the Dashboard). It may also

be access by clicking on Practices in the Company pages menu and then clicking on Overview.

PRACTICE OVERVIEW

The practice overview page provides an immediate insight on the performance and use of CAPTIV8. The KPI Dashboard (Key Performance Indicator) shows gauges that compare the performance of your practice to the average CAPTIV8 user's practice. The KPI dashboard is shown below:



1. Shows how many emails the practice is sharing with patients compared to the average practice for that particular month. This means that the above practice is sending 5.93 times more emails than the average practice using CAPTIV8. The more emails that are sent to patients, the greater the number of visitors and patient recommendations (or sharing).
2. Shows the number of visitors to your online patient education centre compared to the average practice using CAPTIV8. In the example above, there are 9.8 times more visitors compared to the average practice using CAPTIV8.

3. The above example shows that there are 2.86 more patients sharing animations with the friends.
4. Shows the most popular animations that are shared by all CAPTIV8 users.

Clicking on the Reports link on the practice overview page will show absolute data relating to your practice (see the screen shot below).



1. Examine reports based on time by selecting the appropriate period over which you want the report.
2. There are various reports.
 - a. Practice to Patient shows the number of shared animation emails sent to the patient from the practice.
 - b. Patient recommendations shows how many patients are sharing animations from the online patient education centre after you have shared an animation from the practice (does not included forwarded emails from the email client).
 - c. Total sharing incorporates all sharing i.e. a + b.

- d. If you have purchased a home page, then this graph shows how many unique visitors accessed your home page. Unique visitors differs from all visitors in that if a unique PC accesses your home page 100 times it is only counted once.
 - e. Unique animation page visitors shows how many individuals viewed animations on your online patient education centre. Unique visitors differs from all visitors in that if a unique PC accesses your home page 100 times it is only counted once.
 - f. Unique visitors is the total of d + e.
 - g. All home page visitors provides the total number of times your home page was viewed.
 - h. All animation page visitors provides the total number of times your online patient animations resource was visited. Typically, you should find that the unique animation page visitors is multiples of times lower than the total animation page visitors. This indicates that patients are visiting your online animation resource frequently and consequently tells you that they find the resource useful. Your brand is therefore consistently being presented to your patients.
 - i. All visitors is the total of the home page and animation page visitors.
3. If you move you mouse over various segments of the pie charts you will see the animation that is most viewed, the number of times it is viewed and as a percentage of all views.
 4. If you move you mouse over various segments of the pie charts you will see the animation that is most emailed, the number of times it was emailed and as a percentage of all emails.
 5. If you move you mouse over various segments of the pie charts you will see the animation that is most forwarded, the number of times it is forwarded and as a percentage of all forwarded animations.

ANIMATION LIBRARY

The animation library allows you to select animations that are available in your online patient education centre. There are also several additional features that are detailed below.

[DASHBOARD](#) | [SWITCH TO A DIFFERENT LANGUAGE](#)

[SIGNED IN AS](#) [OPTIMED](#) | [MY INFO](#) | [SIGN OUT](#)

EYE ASSOCIATES

[OVERVIEW](#)
[ANIMATION LIBRARY](#)
[CONTROL PANEL](#)
[PEOPLE](#)
[SETTINGS](#)
[SURVEYS](#)
[WEBSITE](#)
[HELP](#)

YOU ARE HERE : [PRACTICE](#) > ANIMATION LIBRARY

ANIMATION LIBRARY

ANIMATION	CATEGORY	OPTIONS	
<input checked="" type="checkbox"/> Accommodative IOLs	Clinical Procedures	Embed	Customise Send
<input checked="" type="checkbox"/> Adaptive Tint Lenses	Spectacle Lenses	Embed	Customise Send
<input checked="" type="checkbox"/> Anti-glare Lenses	Spectacle Lenses	Embed	Customise Send
<input checked="" type="checkbox"/> Argon Laser Trabeculoplasty	Clinical Procedures	Embed	Customise Send
<input checked="" type="checkbox"/> Astigmatism	Optical Prescription	Embed	Customise Send
<input checked="" type="checkbox"/> Blepharitis Treatment	Eye Conditions	Embed	Customise Send
<input checked="" type="checkbox"/> Cataract Operation	4D Media	Embed	Customise Send
<input checked="" type="checkbox"/> Cataract Surgery	Clinical Procedures	Embed	Customise Send
<input checked="" type="checkbox"/> Causes of sub-conjunctival bleed Eye Conditions		Embed	Customise Send

YOUR SUBSCRIPTION

Your companies subscription allows you to have a total of **30** installations, this subscription has **9** slots available.

CATEGORIES

☒ 4D Media
 ☒ Clinical Procedures
 ☒ Contact Lenses
 ☒ Eye Conditions
 ☒ Optical Prescription
 ☒ Spectacle Frames
 ☒ Spectacle Lenses
 ☒ Vendor Media

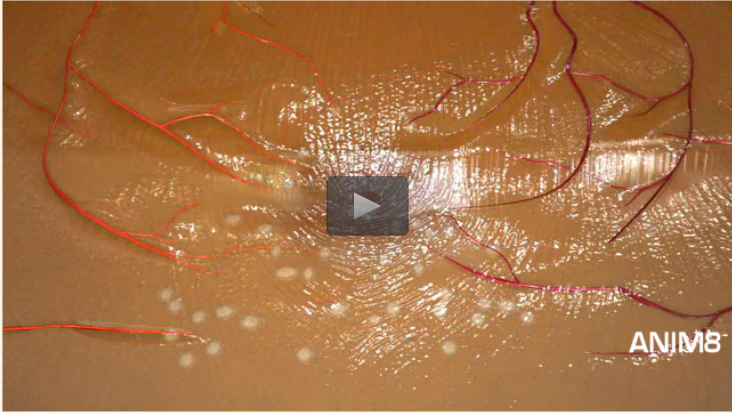
[Search](#)

1. With all new accounts, all animations are displayed in the online patient education centre is a default. However, if you do not wish patients to view certain animations online, then you can deselect the check box and those animations will not display online. Be sure to save at the end of your selection/de-selection.
2. To display a specific category of animations check or uncheck the boxes.

Embed (Animation on your Website)

If you already have a company or practice website, you can use the power of CAPTIV8's 3D animations to add a wow to your website. The embed feature embeds CAPTIV8 animations into your web page – just like a YouTube video.

EMBED AMD: DRY



Frame Width

Pixels

Embedding Type

UPDATE

HELP

Copy and paste the meta tag below in your html <head> tag, to make sure Internet Explorer 10 will embed the animation in your web site.

```
<meta http-equiv="X-UA-Compatible" content="IE=9">
```

Copy and paste the html code and place it in your html to embed this animation in your web site.

```
<!--[if IE]><iframe
frameborder="0"
type="text/html"
src="http://222.296.captiv8online.com/animations/embed/one/d-
l-t-d-m-ul-d-
t-o?player_width=587&
player_height=330" width="587"
height="330" style=""></iframe>
<![endif]><!--[if !IE]>
<--><object
data="http://222.296.captiv8online.com/animations/embed/one/d-
l-t-d-m-ul-d-
t-o?player_width=587&
player_height=330"
type="text/html" width="587"
height="330" style=""> alt :
<a
href="http://222.296.captiv8online.com/animations/embed/one/d-
l-t-d-m-ul-d-
t-o?player_width=587&
player_height=330">AMD: Dry</a>
</object><!--> <![endif]><-->
```

Frame Width

If you select 'Pixels' as the embedding type then you will be able to embed the video player as a fixed width player. The width of the player is defined by the width you enter in the Frame width box.

The recommended size frame width for modern websites is the 'Framed responsive' embedding style. This method embeds a player that automatically responds to the screen size of the device it is viewed on. Click on the 'Update' button to update the embed code on the right.

Embedding Type

You can embed the player as many times as you wish within your website (on one single domain as entered in the settings area of your company pages). The player can be embedded as a single animation, or with a menu that shows all animations within a specific category or with a menu that shows all animations within CAPTIV8.

Content Management Platform Websites

Embedding the animations within content management platforms like Wordpress or Wix is supported within CAPTIV8. However, you do not see the animations display, it could be related to your theme. In this case your web developer may need to adjust the style sheets. Please contact support@optimed.co.uk if you experience difficulty.

WIX

If you use WIX to build your website, please inform support@optimed.co.uk

In order to implement this feature you will need to work with your web developer. Simply copy and paste the code displayed after you click the embed link and email it to your web developer.

Customize (Animation Description)

The online patient education centre has a section beneath the animation window entitled 'Description'. CAPTIV8 automatically creates these for you for all animations. However, you can customize these by clicking on the customize button next to each animation. You will then see the screen shot below:

The screenshot shows the 'EYE ASSOCIATES' website interface. At the top, there's a navigation bar with links: DASHBOARD, SWITCH TO A DIFFERENT LANGUAGE, SIGNED IN AS OPTIMED, MY INFO, and SIGN OUT. Below this is a secondary navigation bar with links: OVERVIEW, ANIMATION LIBRARY (highlighted in pink), CONTROL PANEL, PEOPLE, SETTINGS, SURVEYS, WEBSITE, and HELP. The main content area has a breadcrumb trail: YOU ARE HERE : PRACTICE > ANIMATION LIBRARY > CUSTOMISE. The title 'ANIMATION LIBRARY' is in large pink letters. Below it, the section is 'ACCOMMODATIVE IOLS: CUSTOMISE' with a note 'FIELDS MARKED * AS REQUIRED'. A text box with a red '1' is labeled '* Add your own description of this animation or any information about your practice.' Below the text box is a rich text editor toolbar with options for bold, italic, underline, font family, font size, and background color. At the bottom left are 'SAVE' and 'OR CANCEL' buttons. On the right side, there's a sidebar titled 'ABOUT THIS ANIMATION' containing the following information: Language: English United Kingdom, Name: Accommodative IOLs, Category: Clinical Procedures, and a 'HELP' section. The 'HELP' section contains two paragraphs: 'Add your own description of this animation or any information about your practice.' and 'Once you have customised the animation text and you want to restore the default animation text, just empty your description and click 'Save''. At the bottom of the sidebar, it says 'Click 'Save' to save your animation text.'

1. Enter your custom text in the text box. You can also format the text according to your preference. Once completed, click the save button. Your online patient education centre will then display this text below the animation in the description tab. If you decide to revert back to the default text simply delete your text, click save and the default text will automatically display.

Send (Email campaigns)

The send animation is typically used to send multiple emails to a number of patients for a specific animation. You can also create templates messages that are used in the share animation area. A more detailed description is provided below.

DASHBOARD | SWITCH TO A DIFFERENT LANGUAGE SIGNED IN AS OPTIMED | MY INFO | SIGN OUT

EYE ASSOCIATES

OVERVIEW ANIMATION LIBRARY CONTROL PANEL PEOPLE SETTINGS SURVEYS WEBSITE HELP

YOU ARE HERE : PRACTICE > ANIMATION LIBRARY > SEND TO PATIENT

ANIMATION LIBRARY

SEND TO PATIENT

FIELDS MARKED * AS REQUIRED

From 1 Optimed

* Patient's title

* Patient's first name

* Patient's last name

* Patient's email

Send to more than one patient Browse... 2

SEND OR [CANCEL](#)

* Message No template used 3

4 `Dear !Patient.title! !
!Patient.firstname! !
!Patient.lastname!

We are offering the very
latest assessment for a
detailed examination of your`

* Template name Optomap 5

☒ Tick if this template is for this animation only.

☒ Tick if you want to save this message as a new template.

ABOUT THIS ANIMATION

Name: Accommodative IOLs
Category: Clinical Procedures

HELP

Patient's title
Type in your patient's title as you would like it displayed in the email you send to them.

Patient's first name
Type in your patient's first name as you would like it displayed in the email you send to them.

Patient's last name
Type in your patient's last name as you would like it displayed in the email you send to them.

Patient's email
Type in your patient's email address.

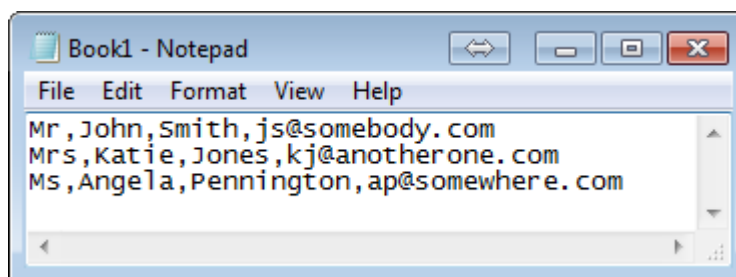
1. Use the drop menu to select a user in your Practice (shows who the email will be from).
2. Click the browse button to upload a .csv file containing the patient name and email address. Virtually all practice management software companies allow you to export data from your practice management software in this format. Please contact your practice management software provider for instructions on how to do this.

The file may need editing; this should be done in a spread sheet editor like Microsoft Excel. An example of the layout of the spread sheet is shown below.

	A	B	C	D
1	Mr	John	Smith	js@somebody.com
2	Mrs	Katie	Jones	kj@anotherone.com
3	Ms	Angela	Pennington	ap@somewhere.com

You check to see if the file is a comma separated file by right clicking on the file

and opening it with 'Notepad'. It should look like this:



3. Select the template message that will be used in the body of the email.
4. If you want to create your own template message you can do so at any time without necessarily have to perform an email campaign. There are a number of pre-defined merge fields that you can use to personalize the email, these are shown in the Help pane (to the right). A sample email template is shown below as well as how it will be merged in the email body.

<p>Dear !Patient.title! !Patient.firstname! !Patient.lastname!</p> <p>We are offering the very latest assessment for a detailed examination of your eyes. This new technology is called Optomap. We have a amazing 3D animation for you to watch – just click on the link below.</p> <p>Currently we are offering a 10% discount to anyone undergoing an Optomap retinal examination. Please call us to book in for your retinal scan.</p> <p>Many thanks</p> <p>!User.name!</p>
<p>Dear Mr John Smith</p> <p>We are offering the very latest assessment for a detailed examination of your eyes. This new technology is called Optomap. We have a amazing 3D animation for you to watch – just click on the link below.</p> <p>Currently we are offering a 10% discount to anyone undergoing an Optomap retinal examination. Please call us to book in for your retinal scan.</p> <p>Many thanks</p> <p>Optimed</p>

5. If you want to save this template, tick the box where it says 'Tick if you want to save this message as a new template'. You will then be offered the option of naming the template and whether you want to save the template for only the current animation or for all animations. This means that whenever you share an animation from the Chair-side module, this template will be available either for the current animation or across all animations.

PEOPLE

Within each practice or office you can add new users. However, you can also edit the access of an individual user to this specific practice. Note that only admins and account owners can edit a individual users settings.

There are 4 levels of access:

1. No Access: the user is prevented from accessing the practice management area.
2. Library: the user can only access the animation library area.
3. People: the user has access to 2 above but also access the People area.
4. Settings: the user can access 2 + 3 but also make changes to the settings in the practice management area.

Users added from the PRACTICE Management Area will appear on the Share animation area for that specific practice only.

MEDIA CENTRE / CONTROL PANEL

If you have a waiting area, you can set up one of your devices specifically for the waiting area. The Waiting Area Control Panel allows you to remotely control the content displayed in the waiting area from any web browser. Some of the features include the ability to:

1. Create playlists using CAPTIV8's engaging animations
2. Add your own promotional images
3. Add your own promotional videos
4. Schedule playlists at specific times and on specific days

Main Menu

The Main menu screen is divided into 2 areas. The left pane contains panels related to specific areas such as installations and playlists. Across the top of the page are icons that will enable you to add new items and save your work. The Waiting Area Control Panel screen is shown below:



1. Clicking here returns you to the main screen (as above)
2. Clicking on the Installations link will display the screen below.



Edit Installation

When editing an installation you can change its name but also change the practice in which it is allocated. This is important because it allows a different subset of users to control the playback of the device.

Customize Zone

The Customize zone allows you to configure your playlists. A playlist is an ordered list of media as defined in the film strip on the Dock. The customize zone is divided into 5 areas.

Animation Zone

The animation zone shows the CAPTIV8 animations ordered in categories. To add it to the film strip left click and hold the mouse on the animation picture and then drag the animation to an empty film strip segment. Dragging it over a filled segment will overwrite the previous content. If you want to copy that movie to another slot, just left click it and drag to another slot. If you want to delete it, just double click the film strip segment.

The film strip can be any length, as you fill up the empty segments you can scroll by clicking on the right arrow to expose empty segments.

If you want to preview an animation, click on the text underneath it, this will bring up a window that will play the entire animation and display the animation duration and description as shown below:



Save Playlist

Once you have created a playlist you can save the playlist to 2 locations in CAPTIV8. The first is the waiting area (where animations will loop in your waiting area). The second is Chairside. In the latter, the playlist will show in an area called MY PRESENTATIONS. The My Presentations allows you to play a sequence of animations on a topic. For example, you may wish to play the presbyopia animation followed by an multifocal IOL animation. You can publish many presentations to one or more of your installations.

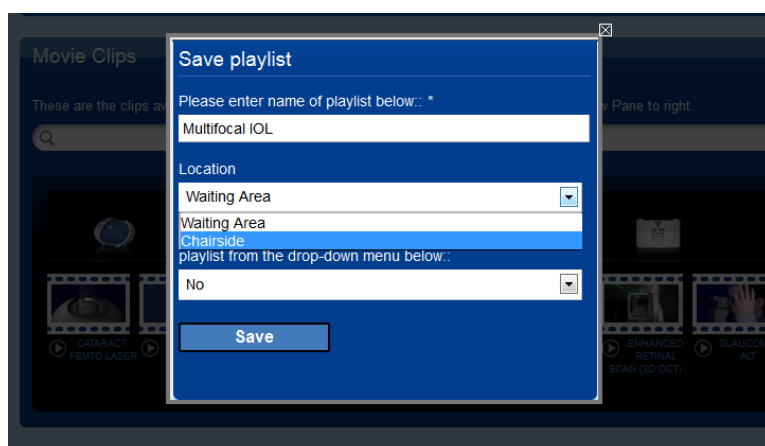


Image Zone

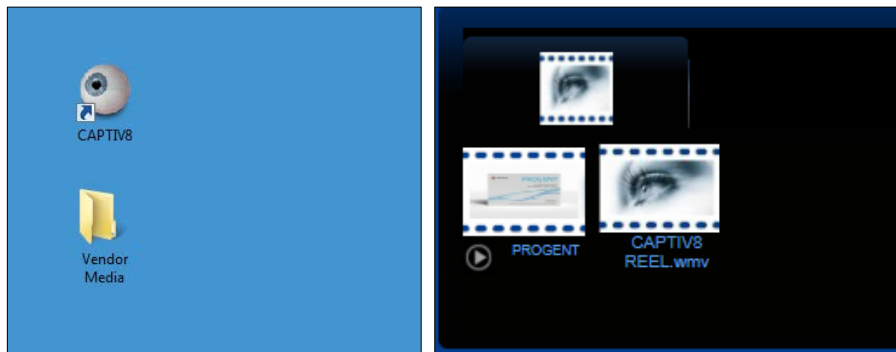
Click on Image Zone in the left pane to add static images in between animations. Select from a number of predefined and categorized template images or even upload your own image. **Note that any uploaded image must be less than 2MB.** To add it to the filmstrip drag a drop over an existing movie, the image will automatically be added to the right of the movie. The image will not overwrite the movie. You can add multiple images in between animation movies. Each image will display for 30 seconds.

Uploading your own image is also possible. In the left area of the screen (shown below) there will be a 'Upload Image' panel. Click the upload button and select an image on your computer. The image must jpeg and 1920x1080 in size. Once it is uploaded it will be populated in the 'Practice Images' category tab. Your practice images are for your practice only and will not be visible to anyone else.



Vendor Media

The Vendor Media folder contains movies that we have provided from partnering suppliers. You can add these movies to your playlist. In addition, on your display installation PC you will notice that there is Vendor Media folder on your desktop (see below). To add your own movies, just copy the movie to the Vendor Media folder and restart CAPTIV8 (close down CAPTIV8 from the small icon in the Taskbar), the movie will appear in the Vendor Media areas in the Control Panel as shown below (right).



The movie should be wmv, avi, mov, mo4, m4v. Furthermore, the movie must be in widescreen format ie. 16:9 (1280x720, 1365x768, 1920x1080). Note that captions are not available for movies that you add to Vendor Media.

Playlist Settings

Once you have created your playlist/s you need to publish the playlist/s to your installation/s. Clicking on the Playlist link in the Customize Zone will show the screen shot below.

Waiting Area Playlists							
Name	Duration	Auto Add	Installations	Modified	Publish	Edit	Delete
Amit playlist	7min 3sec	✗	✗	22/02/2013			
Bon	17min 15sec	✗	✗	22/04/2013			
CL Playlist	28min 54sec	✗	✓	23/04/2013			
ESCRS	29min 24sec	✗	✗	28/03/2013			
Optical	19min 2sec	✗	✗	02/04/2013			
OPTRAFair	41min 24sec	✗	✓	25/04/2013			
Projector	10min 46sec	✗	✗	08/04/2013			
Projector Showreel	11min 27sec	✗	✗	10/04/2013			
Rohit.1	13min 14sec	✗	✗	09/04/2013			
test	12min 41sec	✗	✗	18/04/2013			
WOC	37min 45sec	✗	✗	02/04/2013			

My Presentations						
Name	Duration	Installations	Modified	Publish	Edit	Delete
Claudia	3min 45sec	✓	22/04/2013			
IOL Options	3min 22sec	✓	25/04/2013			
Kamra Inlay	2min 55sec	✓	25/04/2013			
Keratoconus & RGP Lenses	4min 11sec	✓	25/04/2013			
Keratoconus & Treatment	3min 44sec	✓	25/04/2013			
Large Diameter GP	1min 38sec	✓	25/04/2013			
Multifocal Contacts	3min 3sec	✓	25/04/2013			
Multifocal IOL's	5min 39sec	✓	25/04/2013			

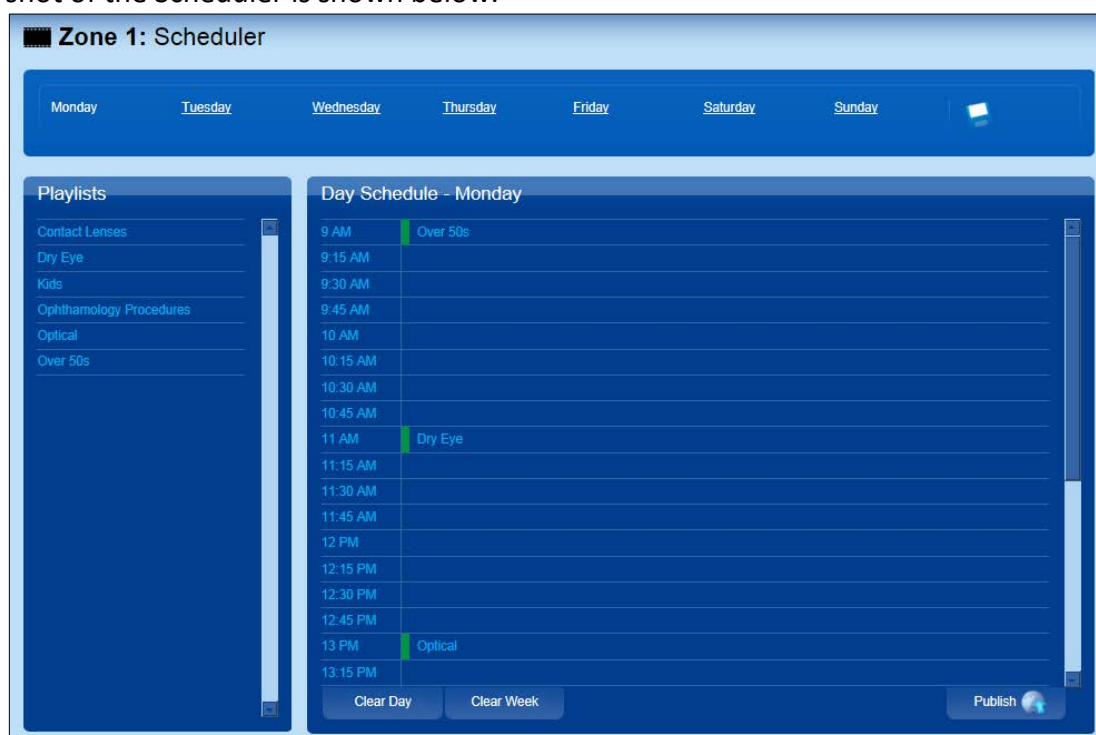
The table shows all your playlists within that practice. The duration of the playlist is displayed and also which installations any particular playlist is currently published to. In order to publish a playlist, click the publish icon, select your installation/s and click the

publish button. The CAPTIV8 software checks for updates once a day, however, you can force an update by either restarting the PC or right clicking on the CAPTIV8 icon on the taskbar and clicking Update>Check for new updates (the PC must be connected to the Internet).

You can also edit and delete playlists from this area.

SCHEDULER

The Scheduler allows you to publish multiple playlists at specific times of the day and on specific days of the week. Many users create specific playlists such as 'dry eye', 'over 50's' etc in order to target specific segments of patients visiting the practice or office. The Scheduler allows users to deploy these playlists at specific times and days. A screen shot of the Scheduler is shown below.



All playlists are shown in the left panel, left click, hold and drag the playlist to a specific time slot. The playlist name will then be displayed in this area. Then drag and drop another playlist at point where you would like it to start playing. In the example above, the Over 50's playlist will start playing at 9am and continue looping until 11am. At this point, the Dry eye playlist will start playing and looping until the next time point. Note that the next playlist only starts after the previous playlist's animation has finished playing so as to avoid any abrupt change to playback.

If you want the same schedule to play every day, leave the other days of the week blank. Once you have scheduled your playlists click the save button at the top of the page. Finally, to deploy your schedule, click the publish button at the bottom of the screen, select your installations and click on the publish button. Your schedule will be deployed after 30 minutes (the installation/s must be connected to the Internet).

SETTINGS (PRACTICE SETTINGS)

Use the Settings area in the practice management pages to change settings for a particular practice. For example, you may have a Company with several practices with different names. The name of each practice can be entered for each of the practice management settings pages. A screen shot and description is provided below:

OVERVIEW | ANIMATION LIBRARY | PEOPLE | SETTINGS | SURVEYS | WEBSITE | HELP

YOU ARE HERE : PRACTICE > SETTINGS > GENERAL

SETTINGS

EYETECH OPTOMETRISTS: GENERAL SETTINGS

FIELDS MARKED * AS REQUIRED

Practice title - English - North America

Eyetechn Optometrists **1**

Practice description - English - North America

2

Appointment

Yes **3**

Show Web Presenter

Yes **4**

Telephone

02476 444566

Fax

5

* Opening Times

09:00 - 17:30

6

Practice Management Software connection password

We recommend to automatically generate the Practice Management Software connection password. To do so [click here](#).

SAVE OR [CANCEL](#)

HELP

'Practice Address': You can only enter address information once, if you have made errors please email optimed-support@menicon.com

'Practice Management Software connection password': Practice management software systems don't have access to your CAPTIV8 animations while the Password field is empty. If your practice management software has functionality to link with CAPTIV8online you must click on the 'click here' link below the 'Practice Management Software connection password'. If you want to disable the link to your practice management software, simply delete the 'Practice Management Software connection password' field and click 'SAVE'.

CAPTIV8online has been designed to integrate with virtually any practice management software provider. If you would like more information, please email optimed-support@menicon.com

Click 'Save' to update the practice settings.

1. Enter the name of the practice. This will be displayed in the online patient education centre.
2. Select whether to show appointment icon (yes/no) on the online patient education centre.
3. If you don't want to allow selection of appointment date and time then select 'No'
4. Select whether to show web genie on the online patient education centre (yes/no).
5. If you don't want to show an animation menu (allows patients to view other animations in the patient education centre) then select No. If you select 'no' then the menu will be replaced with a map identifying your practice.
6. The opening times are used by the Scheduler for this specific practice.
7. If your practice management software supplier has integrated with CAPTIV8, then your patient recalls can be sent automatically by email every month in addition to the printed form. However, as well as sending a recall reminder, a link to a specific animation can be included in the email. As patients are assigned to

specific recall categories in your practice management software, you can match recall categories with specific animations. For example, you may have a patient classified as a 6 month glaucoma recall. In this case, you wish to assign all recalls in this category to an OCT animation. Patients will receive an email recall reminder, in the body of the email will also be a link to a 3D OCT animation.

SURVEYS

Patients can be sent surveys through the Chair-side module. They are a excellent way to gain anonymous feedback from patients. You can use pre prepared Surveys or alternatively create your own question and answers. If you want to use the pre defined surveys click on the 'preview' button to preview it. If you want to use it, then click the copy link and a copy of the survey will be added to your account.

DASHBOARD | SWITCH TO A DIFFERENT LANGUAGE

SIGNED IN AS DR DAVE | MY INFO | SIGN OUT

EYETECH OPTOMETRISTS

OVERVIEW | ANIMATION LIBRARY | PEOPLE | SETTINGS | SURVEYS | WEBSITE | HELP

YOU ARE HERE : PRACTICE > SURVEYS

REPORTS | ANSWER GROUP

SURVEYS

'Satisfaction Survey 19-Nov-2011' has been successfully added to your account.

EYETECH OPTOMETRISTS: SURVEYS

NAME	OPTIONS
Your Spectacles	Copy Preview
Satisfaction Survey	Copy Preview
Satisfaction Survey 19-Nov-2011	Questions Edit Copy Delete Export Preview Send

<< Previous >> Next

1 2 3 4 5 6 Page 6 of 1

SURVEYS

[+ ADD SURVEY](#)

SEARCH

Enter the survey name in the field below to search for a specific survey.

[Search](#)

A survey that is copied from the pre defined surveys may also be edited and modified in all aspects. Once you learn how to create a new survey you will find editing an existing one easy.

1. Clicking on the Questions link allows you to add more questions, edit questions and change the order of questions in the survey.
2. Edit the survey to add your own survey name, introductory message and end note.
3. Click copy to make another copy of the survey.
4. Delete the survey by clicking on the delete button.
5. Export the survey to a csv file so that you can analyse the data in a spreadsheet.
6. As with animation sharing, you can send a survey from the Chair-side to one patient, however, through the practice management page you can send a survey to many patients. You can create your own message template and upload a csv file containing patient names and email addresses. The procedure is

described below:

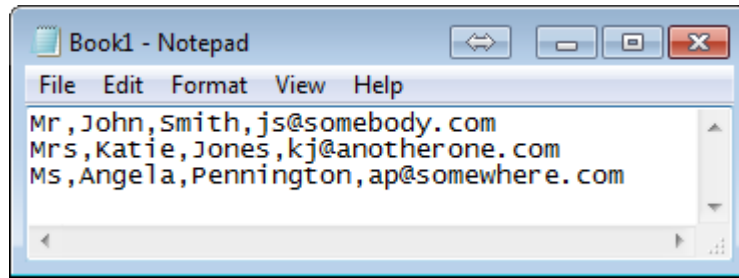
- a. Use the drop down menu to select a user in your Practice from who the email will be from (see screen shot below).

- b. Click the browse button to upload a .csv file containing the patient name and email address. Virtually all practice management software companies allow you to export data from your practice management software in this format. Please contact your practice management software provider for instructions on how to do this.

The file may need editing; this should be done in a spread sheet editor like Microsoft Excel. An example of the layout of the spread sheet is shown below.

	A	B	C	D
1	Mr	John	Smith	js@somebody.com
2	Mrs	Katie	Jones	kj@anotherone.com
3	Ms	Angela	Pennington	ap@somewhere.com

You can check to see if the file is a comma separated file by right clicking on the file and opening it with 'Notepad'. It should look like this:



- c. Select the template message that will be used in the body of the email.
- d. If you want to create your own template message you can do so at any time without necessarily having to perform an email campaign. There are a number of pre-defined merge fields that you can use to personalize the email, these are shown in the Help pane (to the right). A sample email template is shown below as well as how it will be merged in the email body.

<p>Dear !Patient.title! !Patient.firstname! !Patient.lastname!</p> <p>We are conducting a survey on the quality of our eye examination service. As you recently attended we would value your opinion. Please take a few moments to answer just 3 questions that will take no longer than 1 minute of your time.</p> <p>Many thanks</p> <p>!User.name!</p>
<p>Dear Mr John Smith</p> <p>We are conducting a survey on the quality of our eye examination service. As you recently attended we would value your opinion. Please take a few moments to answer just 3 questions that will take no longer than 1 minute of your time.</p> <p>Many thanks</p> <p>Optimed</p>

- e. If you want to save this template, a tick to box where it says 'Tick if you want to save this message as a new template'. You will then be offered the option of naming the template and then whether you want to save the template for only the current animation or for all animations. This means that whenever you share animations from the Chair-side module, the template will be available either for the current animation or across all animations.

Create a New Survey

After you click on the survey link in the practice management pages, you will see a '+ Add Survey' button. Click the button to start the process of adding a new survey, you will see the screen below:

YOU ARE HERE : [PRACTICE](#) > [SURVEYS](#) > ADD

SURVEYS

EYETECH OPTOMETRISTS: ADD SURVEY

FIELDS MARKED * AS REQUIRED

* Name - English - North America
1

* Description - English - North America
2

* End Note - English - North America
Thank you for entering this survey.
3

SAVE OR CANCEL

HELP
Click 'Save' to save your survey.

1. Enter the name of the survey
2. The description will appear on the first page of the survey
3. Enter a final message once the survey is completed, then click save.

Once a survey has been added, it needs to be populated with questions and answers. Create your questions by clicking on the Questions link and then select the '+Add Question' button. The following page will be displayed:

[OVERVIEW](#) | [ANIMATION LIBRARY](#) | [PEOPLE](#) | [SETTINGS](#) | [SURVEYS](#) | [WEBSITE](#) | [HELP](#)

YOU ARE HERE : [PRACTICE](#) > [SURVEYS](#) > Patients Satisfaction Survey > [QUESTIONS](#) > ADD

SURVEYS

PATIENTS SATISFACTION SURVEY: ADD QUESTION

FIELDS MARKED * AS REQUIRED

* Name - For internal use only
1

Category name - English - North America
2

* Question - English - North America
3

Type
MCQ 4
Text

Sequence
19 5

Status
Offline 6
Online

Answer Group 7
Please select group
Please select group
Lead source
Difficulty rating
General rating
Frame rating
Yes/No
Probability rating

SAVE OR CANCEL

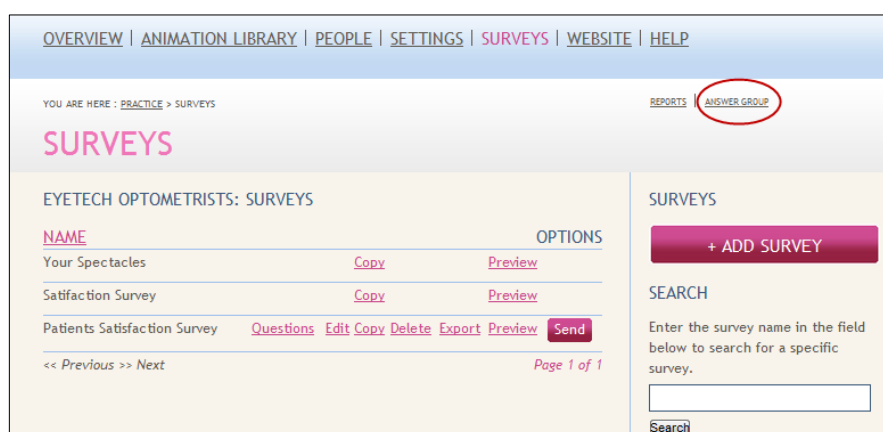
HELP
'Category name'. Questions in the survey can be grouped into categories. The 'Category name' will be displayed above the question.
'Question'. Please type question in your survey.
'Sequence'. Questions with the same sequence number will be displayed on the same page. MCQs with the same sequence and answers will be grouped.
'Answer group'. Please select the answers you want to associate with this question. To add new answers click [here](#).
Click 'Save' to save the survey question.

1. Enter a name for the survey, you can call this anything you require as it for internal use only.
2. Enter a category name. A category is only required if you intend on adding multiple questions within a category. For example, if you have a category in a survey entitled 'Reception' and you want to add multiple questions to this category then all questions will be displayed with a category title.

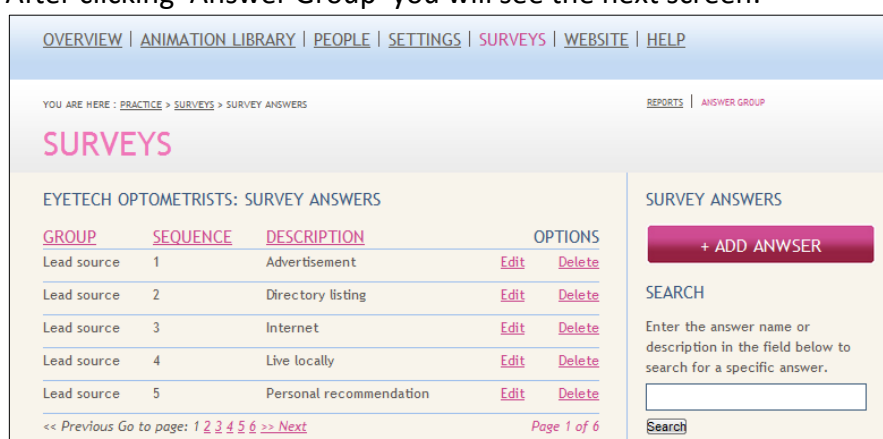
3. Type in your question here.
4. Questions can have either text based answers (where a respondent answers by typing in an answer) or as a multiple choice answer.
5. The sequence number defines the order in which a question will appear. If all questions have the same sequence number then they will appear on the same page. This is useful for MCQ's (multiple choice questions) where they will be displayed in a table format on the same page.
6. The status defines if that question is included in the survey.
7. MCQ's have answer groups. Select the group of answers you want to display for a MCQ (note the answer group will be displayed below the Answer Group drop down menu after you select it. If the answer group is not included you can create your own answer group. Creating a new answer will be discussed in the next section.

Creating Answer Groups

MCQ answers have multiple answer options. These answers are grouped into answer groups for identification. If the answer groups already with the CAPTIV8 survey system are not suitable for your question, you can create your own group of MCQ answers. After you click on 'Survey' you will see a link to 'Answer Group' – see below:



After clicking 'Answer Group' you will see the next screen:



If you wish to edit a series of answers already in the system, click edit. You can also delete answers here too.

To add a new answer group click '+Add Answer'. You will then see the screen below:

OVERVIEW | ANIMATION LIBRARY | PEOPLE | SETTINGS | SURVEYS | WEBSITE | HELP

YOU ARE HERE : PRACTICE > SURVEYS > SURVEY ANSWERS > ADD

REPORTS | ANSWER GROUP

SURVEYS

ADD ANSWER

FIELDS MARKED * AS REQUIRED

Group - [add a new group](#)

Lead source **1**

* Description - English - North America

2

Sequence

1 **3**

Status

Online **4**

SAVE OR [CANCEL](#)

HELP

Click "Save" to save the survey answer.

1. MCQ's are grouped. Each group has a name. If your answers are to be in a new group then click the 'add new group'. A pop up will appear asking you to enter a group name. This group will then appear in the drop down group menu.
2. Enter one of the answer options for your answer group.
3. The sequence number defines the order of the answers, for example, if this is the 3rd answer in the MCQ then the sequence number will be 3.
4. Keep the status offline until you have completed adding all you answers.

Support

Visit www.optimed.co.uk for support videos. Alternatively, email or call you local distributor.

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