NCALC SCHEDULER

User Documentation

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# Installation

Requirements for the NCALC Scheduler:

* Microsoft Windows 7 or greater
* Microsoft Access 2013
* Microsoft Excel 2013
* Stable Internet Connection

1. Navigate your browser to http://dev.mysql.com/downloads/connector/odbc/
2. Download and install the MYSQL Connector appropriate for your system.
3. Run the schedculer.accdb file.
4. Click on the ‘External Data’ tab at the top of the page.
5. Click on ‘ODBC Database’ in the ‘Import & Link’ toolbar.
6. Select ‘Link to the data source by creating a linked table’ and press OK.
7. Click on ‘New…’
8. Select the MySQL ODBC Driver entry and press Next.
9. Enter an appropriate name in the text entry box.
   1. Although the actual name is not important for functional use, I recommend using NCALC Scheduler Connection for ease of later identification.
10. Press Finish
11. The MySQL Connector Source Configuration form should appear after a few seconds. If It does not, please contact technical support for assistance.
12. Enter the following values respecting case sensitivity in all places.
    1. TCP/IP Server: 54.148.252.254
    2. Port: 3306
    3. User: ncalc
    4. Password: ncalc
    5. Database: chico\_scheduler
       1. Ukiah Installations use ukiah\_scheduler instead
13. Press Ok
14. Press the Save Password Button
15. Press the Select All button
16. Press Ok
17. You will see Tables begin to appear in the Access Objects Panel over the next few seconds.
    1. You May Be Prompted To Save the Password again. Simply say ok each time it asks this.
18. When this is finished, your application should now be ready to use.

# Main Menu

This form will allow you to navigate to the features of the NCALC Scheduler that you wish to use.

## BUTTONS:

* CREATE MEETING: This button takes you to the form to create a meeting for a specific house.
* ADD/EDIT CLIENT: This button takes you to the form to create or edit a client.
* [ADD/](#_Create_Employee)[EDIT EMPLOYEE](#_Edit_Employee): This button takes you to the form to create or edit an employee.
* ADD/EDIT HOUSE: This button takes you to the form to create or edit a house of clients.
* EDIT DEFAULT SHIFT: This button takes you to the form to edit the default weekly shift assignments for a house.
* VIEW CALENDAR: This button takes you to the form that will display all the shifts for a house in a 6-week period.

# Create Employee

In the [Main Menu](#_Main_Menu), click on the Create/Edit Employee button

Fill in all appropriate fields in this form and click on the Create button.

## FIELDS:

* EXISTING EMPLOYEES: This is not used to add an employee
* LAST: Employee’s Last Name. This is a required Field.
* FIRST: Employee’s First Name. This is a required Field.
* MI: Employee’s Middle Initial
* REGIONAL CENTER: This drop down will allow you to select which regional center is associated with this employee’s area of employment.
* PAY RATE: The Employee’s pay per hour. Do not enter values for daily/weekly/monthly/annual pay here.
* SICK LEAVE RATE: The rate at which an employee accrues sick leave. This metric is not yet defined.
* TITLE: The employee’s title with the organization
* PHONE: The employee’s phone number. Value may either be in 10 digit or 7 digit format.
* HIRE DATE: in 9/15/1999 format. If this is left blank it will default to the current day’s date.
* COMMENTS: Any additional notes about the employee can go here.

## BUTTONS:

* CREATE: This button will store all of the data entered about the employee and clear the screen.
* CLEAR: This will clear the screen of data and allow you to start over.
* CANCEL: This will clear the screen of data and return you to the Main Menu.

# Edit Employee

In the [Main Menu](#_Main_Menu), click on the Create/Edit Employee button

Select an employee from the Existing Employee drop down box.

Fill in all appropriate fields in this form and click on the Update button.

## FIELDS:

* EXISTING EMPLOYEES: Used to select an employee
* LAST: Employee’s Last Name. This is a required Field.
* FIRST: Employee’s First Name. This is a required Field.
* MI: Employee’s Middle Initial
* REGIONAL CENTER: This drop down will allow you to select which regional center is associated with this employee’s area of employment.
* PAY RATE: The Employee’s pay per hour. Do not enter values for daily/weekly/monthly/annual pay here.
* SICK LEAVE RATE: The rate at which an employee accrues sick leave. This metric is not yet defined.
* TITLE: The employee’s title with the organization
* PHONE: The employee’s phone number. Value may either be in 10 digit or 7 digit format.
* HIRE DATE: in 9/15/1999 format. If this is left blank it will default to the current day’s date.
* COMMENTS: Any additional notes about the employee can go here.

## BUTTONS:

* UPDATE: This button will store all of the data entered about the employee and clear the screen.
* DELETE: This button will delete the employee from the records.
* CLEAR: This will clear the screen of data and allow you to start over.
* CANCEL: This will clear the screen of data and return you to the Main Menu.
* ACTIVATE/DE-ACTIVATE: This button will toggle the active status of this employee.
  + On the top right of the form is a red/green light. This will also indicate if the employee is active (green) or inactive (red)
* IHSS: This button will open the IHSS Eligibility form for this employee.
* BLACKOUT DATES: This button will open the Blackout Dates form for this employee.

# Add/Edit A House

In the [Main Menu](#_Main_Menu), click on the Add/Edit a house button

## Workflow 1: Create a new house.

Select an Unassigned Client, enter any comments you wish, and press the Post button.

## Workflow 2: Add an Employee To a House.

Select an Existing House, select an Unassigned Client and press Assign to House

## Workflow 3: Remove an Employee To a House.

Select an Existing House, select an Assigned Client and press Remove from House

## Workflow 4: Disband a House

Select an Existing House and press Disband House

## FIELDS:

* EXISTING HOUSES: Used to select a house that has already been created.
* UNASSIGNGED CLIENTS: Used to select a client that has not been assigned to a house yet.
* ASSIGNGED CLIENTS: Used to select a client that has already been assigned to the house selected in the Existing Houses field.
* Comments: A free text field with no validation.

## BUTTONS:

* DISBAND HOUSE: This button will store all of the data entered about the employee and clear the screen.
* POST: This button will delete the employee from the records.
* CANCEL: This will clear the screen of data and allow you to start over.
* CANCEL: This will clear the screen of data and return you to the Main Menu.
* ACTIVATE/DE-ACTIVATE: This button will toggle the active status of this employee.
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* IHSS: This button will open the IHSS Eligibility form for this employee.
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