Community-aid Project

Operator's manual

Terms used in the manual

Call System - the software package that consist of the server and client parts. Server part runs on any UNIX-like OS and has database in the back-end to store the data. Interface with the user (operator) is via web browser. Every user if the system must have an account (login name and password) that would allow her to work with the system.

Operator – person who makes to and takes calls from clients and logs details of the call in the Call System.

Administrator – an operator with supervisor role who has extended rights on the Call System. Capable of creating account for new operator, register new clients with the Call System, edit client details, deactivate/re-activate clients, etc.

Client – a person who opted to register with the service.

The Call System privileges

The Call System privileges concept spins around two roles: *Operator* and *Administrator*.

Operator is the basic role. It's the person who takes calls from and makes calls back to the service clients who signed up for the call service. Operator records all the details of the call into the Call System. This is the only function available to operator of the Call System.

Administrator is an operator with special privileges. She can not only register details of the calls made or taken, but also can:

- add clients to the Call System
- edit client details
- deactivate client
- re-activate client
- add/edit/delete operators
- add groups (to group clients)
- move clients from one group to another
- assign group of clients to operators
- add/edit call classifications
- add/edit districts
- create reports
- change Call System configuration
- do quick data-only backups of the Call System database

Any Operator can be granted Administrator privileges by another existing Administrator of the Call System. Also an Administrator can revoke the administrator privilege from another Administrator of the Call System.
NOTE. To safeguard the Call System, the default Administrator account (admin) always retain the Administrator privilege.

Login to the Call System

Freshly installed Call System has only one operator called **admin**. This operator has Administrator privilege and should be used to create named accounts for all the staff members (including the supervisor). It's recommended not to use the account for daily operations for the sake of traceability.

At the beginning of the day an operator must login with her name and password to start working with the system (see Figure 1)

Figure 1. Call System's login screen

Logout from the Call System

At the end of the day every operator shall logout from the Call System by clicking *logout* link in the left top corner of the screen (see Figure 2).

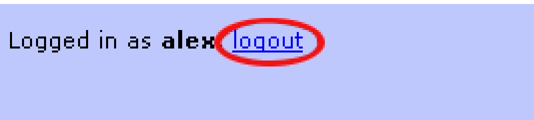

Figure 2. Logout link.

Administrator's and Operator's main menu

Depending on the assigned privileges, the main page will present either Operator's menu (see Figure 3) or Administrator's menu with all the function an Administrator can carry out (see Figure 4).

Figure 3. Operator's menu

Figure 4. Administrator's menu

Adding new operator to the Call System (Administrator only)

This operation can only be carried out by an operator with Administrator privileges. Choose *Add Operators* in the main Administrator menu and fill the details for the operator (login name, full name and password) in the fields provided (see Figure 5). Password will be displayed as a set of asterisks for security reasons.
If you want to assign the operator Administrator privileges, use the check box *Administrator*.

Press *Add Operator* button to complete the operation. Repeat the operation for every member of your team.

Figure 5. Adding new operator to the Call System.

Edit Operator (Administrator only)

This operation can only be carried out by an operator with Administrator privileges. The screen is very similar to the one of *Add Operators*. Choose *Edit Operators* in the main Administrator menu and on the next screen choose the Operator's name whose details you want to edit and press *Edit Operator* button. On the next screen fill the details for the operator (login name, full name and password) in the fields provided (see Figure 5) and press *Submit* button when ready to save the changes.

Delete Operator (Administrator only)

This operation can only be carried out by an operator with Administrator privileges. Choose *Delete Operators* in the main Administrator menu and on the next screen choose the name of the Operator you want to delete and press *Delete Operator* button.

Adding new client to the Call System (Administrator only)

This operation can only be carried out by an operator with Administrator privileges. Choose *Add Client* in the main Administrator menu and fill the details for the client in the fields provided (see Figure 6). All fields with red asterisk next to it are mandatory.

Figure 6. Adding new client to the Call System.

Edit client details (Administrator only)

This operation can only be carried out by an operator with Administrator privileges. Choose *Edit Client* in the main Administrator menu, choose the client from the drop down list of clients and press *Edit client* button. The edit screen is nearly identical to *Add* Client scree (see Figure 6), but there is one difference – *Change note* field at the very bottom of the screen (see Figure 7). The field is mandatory and shall be used to record the reason for editing the client details to keep track of changes.

Once you are finished with editing, press *Submit* button to complete the operation.

Figure 7. *Change note* field.

De-activate and re-activate client (Administrator only)

This operation can only be carried out by an operator with Administrator privileges. Choose *De-activate Client* in the main Administrator menu, choose the client from the drop down list of active clients and press *De-activate client* button. If the operation went through successfully, you will see *Client set inactive* message on the screen.

Inactive client doesn't appear on operator's *Calls* screen until the client is re-activated back again.
De-activation maybe useful for temporary suspension of the client (when the client is away on holiday for example) or for longer term one (when the client decided to stop using the service for any reason).

NOTE. On the Call System clients are never deleted completely for data consistency reasons.

To re-activate the client, choose *Re-activate Client* in the main Administrator menu, choose the client from the drop down list of inactive clients and press *Re-activate client* button. If the operation went through successfully, you will see *Client set active* message on the screen. From that moment on the client becomes visible again on operator's *Calls* screen.

Calls screen

This is the main tool of every operator and the only one available to operator without Administrator privileges.

When an operator chooses *Calls* in the Operator's main menu, she will see the list of assigned clients (see Figure 8). Clients listed in the order of the time of the next call (the earliest one is at the top of the list).

Figure 8. Calls view. Client list.

When Operator starts the day, all the clients on the list have their *Time slot* time listed next to their names. Once the first call of the day is made, the client name drops down to the bottom of the list and if no follow up call is required (i.e. the call was marked as *finished*; see Figure 9), then the client's name will have no time next to it.

If the first call of the day required a follow up call, then the call shall be marked as *not finished* by the Operator (see Figure 9) and the client's name will be listed in order of the follow up call time with the next call time listed next to the client's name.

So, the rule is simple. If you see time next to client's name, then this is the time when you need to call the client. If there is no time listed next to the client's name, then there is nothing to do with this client today.

If Operator for any reason has missed the time of the next call, then the time next to the clients name will be indicated in red colour and the reason why will be clearly stated next to the time (see Figure 10).

Floating list

For convenience of managing absent Operator's clients, the Call System has so called *floating list* of clients. The list is visible to all operators and they can mix it in to their current list of clients at any given moment by clicking *Include clients from the floating* list link in the *Calls* screen. Once clicked the link will be substituted with *Exclude clients from the floating list* one to allow Operator to roll back to their own list only (see Figure 11).

Administrator may decide to put all the clients of the absent Operator to the floating list, so the present Operator can cover for the absent one and share the load by including the floating list clients at scheduled intervals.

Operators can exclude the floating list by clicking *Exclude clients from the floating list* link at any time (see Figure 11).

Calls screen. Client view.

This is the place where Operator records all the details of the call. She has client's name in the left top corner, client details right in the middle of the screen (phone numbers, contact person details, GP name, etc.)

Report field is used to log the details of the conversation.

Call Classification is the list of available classifications (this list can be extended by Operator with Administrator privileges at any time). If left intact the default classification is assigned to the call.

NOTE. The default classification may not be the one that matches the call details! Please, make sure you have paid attention to that. Otherwise, when you run reports later, you may be surprised by how many calls of particular (default) classification you have in the database.

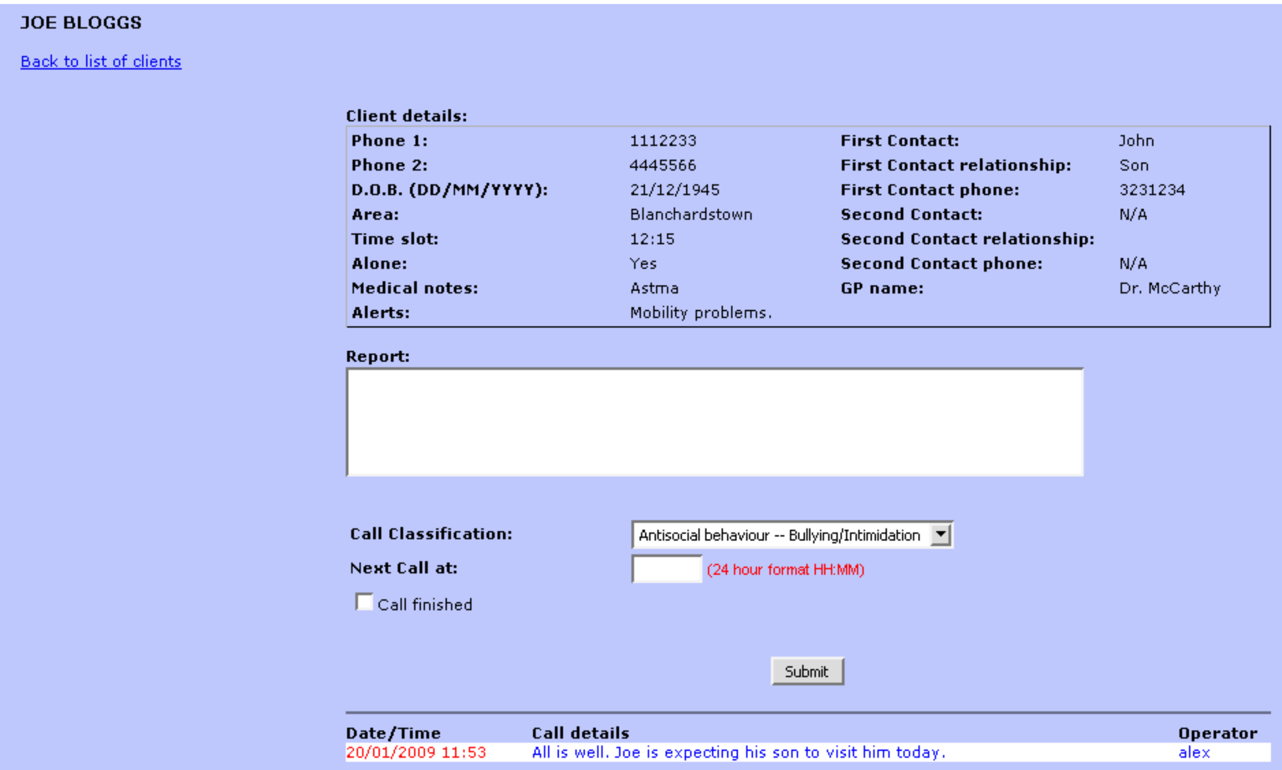

Figure 9. Client view.

Next call field is for the time of the follow up call (if one required).

Call finished check box is to mark the call as one that requires no follow up calls. If the client asks you to ring her again, then use *Next call* field to set the time of the follow up call and leave the check box unchecked, so the client name is listed with the follow up call time in your clients list.

Submit button should be pressed once the call is over to record the data in the database of the Call System.

What you see below the *Submit* button is the history of calls. The Call Systems shows the last three weeks worth of calls history (if any) with date and time of each call, conversation details and the login name of the Operator who made/took the call.

Figure 10. Missed call time.

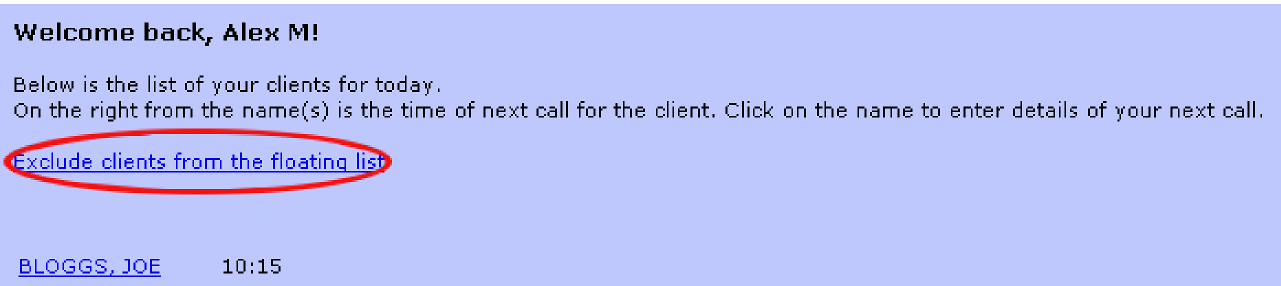

Figure 11. *Exclude clients from the floating list*link.

Adding groups (Administrator only)

This operation can only be carried out by an operator with Administrator privileges. Choose *Add/Edit Group names* in the main Administrator menu to move to the split screen where you can edit the existing group names or add new ones.

To edit the existing group

Use only the top half of the screen, if you need to edit the existing group name (see Figure 12).

Old Group name drop down list allows you to choose the existing group name you want to change.

New name for the group is the field to put the new name in.

Press *Save New Group name* button to save the new name.

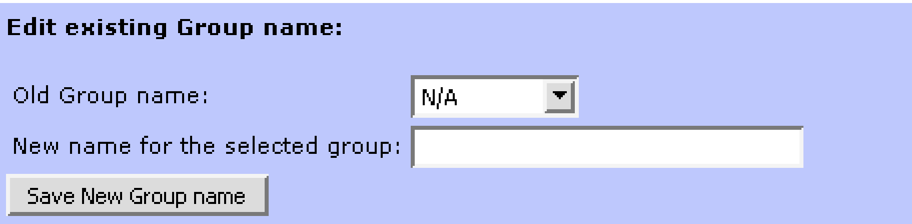

Figure 12. Edit existing group name.

If the operation went through successfully, you will see *Group name updated* message on the screen.

To add new group name(s)

If all you need is to add one or more new group names to the Call System, use the bottom half of the screen (see Figure 13). List group names one per line in the *Add new Group names* text box and press *Add new group(s)* button when ready.

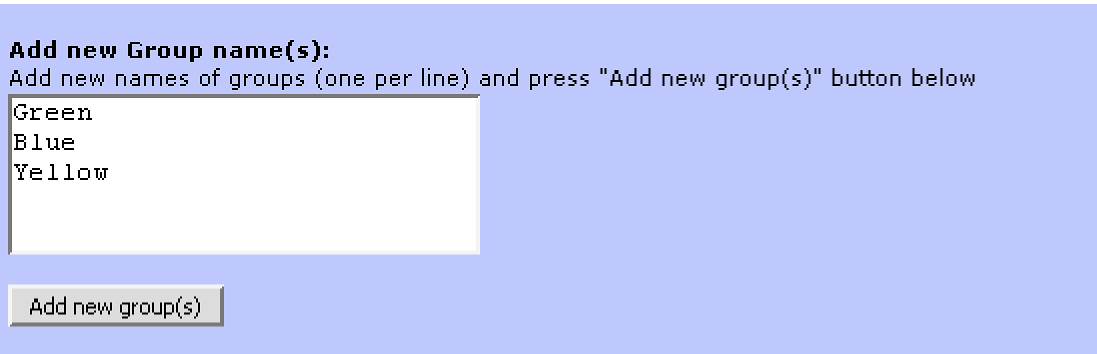

Figure 13. Adding new group names.

If the operation went through successfully, you will see *New group(s) added* message on the screen. The new group names become available immediately.
To assign a client to the newly created group, go to *Edit Client* in Administrator's main

menu and change the client's group name to the group of your choice (see Figure 14). This operation is only allowed to Operators with Administrator privileges.

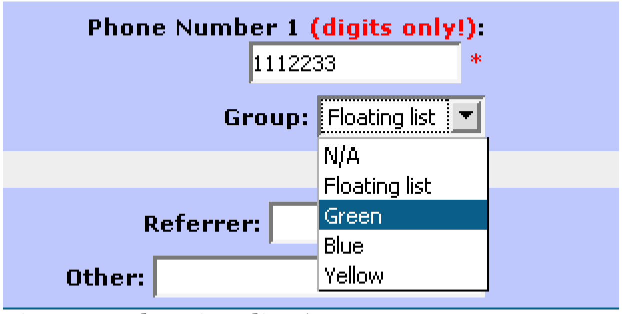

Figure 14. Changing client's group.

Moving clients from one group to another (Administrator only)

This operation can only be carried out by an operator with Administrator privileges. Choose *Move clients* in the main Administrator menu and choose the source and destination group names on the next screen. When ready, press *Move clients* button.

For example, let's imagine that an Operator who looked after *Green* group of clients fell sick and for some period of time Administrator decided to move all her clients on to the *Floating list* to allow other Operators to cover for her. When the Operator came back, you need to move all the clients from the *Floating list* (given there was no other clients there!) back into her group (*Green*). So, you choose *Floating list* in the *From group* drop down list and *Green* in *To Group* drop down list and then press *Move clients* button to complete the operation.
If the operation successfully completed, you will see the message *Clients moved from Floating list to Green successfully*.

NOTE. If you had other than *Green* group clients on the *Floating list,* they all will be moved into *Green* group! Please, be careful when moving clients from one group to another. All of the group members are moved.

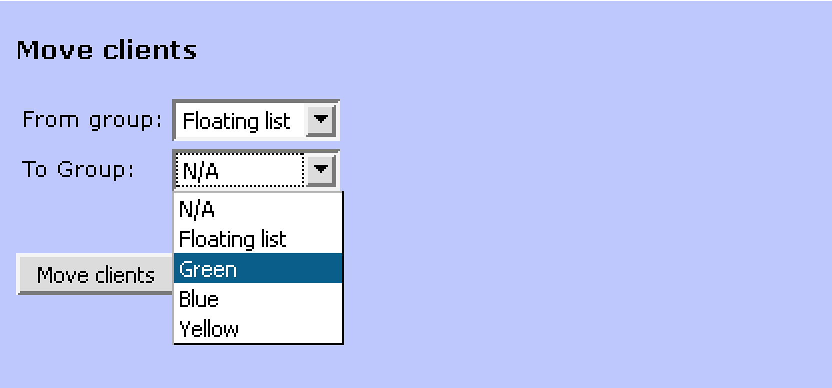

Figure 15. Moving clients from *Floating list* to *Green* group.

Printing group lists (Administrator only)

This operation can only be carried out by an operator with Administrator privileges. Choose *Print Group list* in the main Administrator menu and in the Group drop down list choose the name of the group whose members list you want to print out. When ready, press *Print Group list* button (see Figure 16).

The printed list will include client ID, name, district and the time slot.

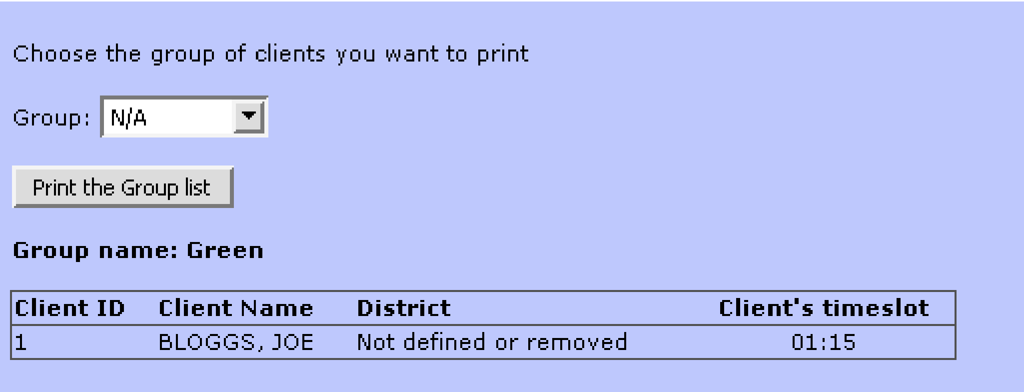

Figure 16. Printing out the members of a group.

To repeat the operation for a different group, choose the group's name in *Group* drop down list and press *Print the Group list* button again.

Assigning clients to Operator (Administrator only)

This operation can only be carried out by an operator with Administrator privileges. Choose *Assign Client(s) to Operator* in the main Administrator menu then in Operator drop down list choose the Operator you want to assign the clients to and in Group drop down list choose the name of the group that you want to assign to the Operator.
Pree *Assign the Group to the* Operator button when ready (see Figure 17).

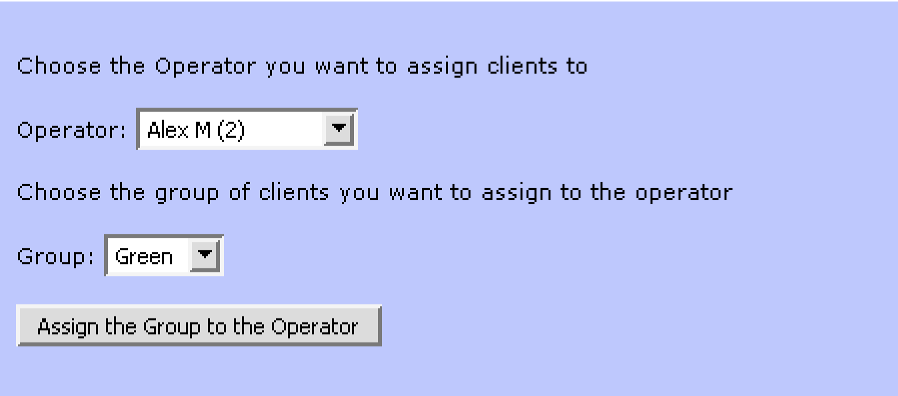

Figure 17. Assigning group *Green* to Operator *Alex M*.

If the operation went through successfully, you will see *Clients assigned to operator* message on the screen.

Adding new districts to the Call System (Administrator only)

This operation can only be carried out by an operator with Administrator privileges. Choose *Add/Edit Districts* in the main Administrator menu then you arrive at the split screen where you can edit the existing District names or add new ones.

To edit the existing District name

Use the top half of the screen to edit the existing District name. Choose the name of the District you want to change in *District* drop down list and type in the new name in *New name for the selected district* field. Press *Save the new name* button when ready.
The new name is effective immediately. All the clients who had the old one in their details will have the new name there from now on.

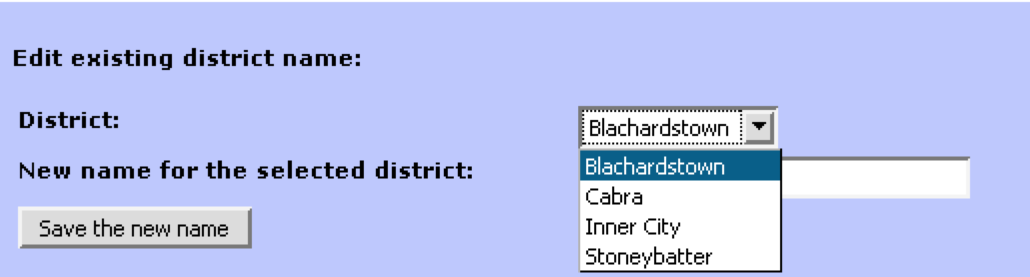

Figure 18. Editing the existing District name.

To add new District name(s)

To add new Districts to the Call System use the bottom half of the screen. Add one or more districts into *Add new district* text box (one per line) and press *Add new district(s)* button when ready (see Figure 19).

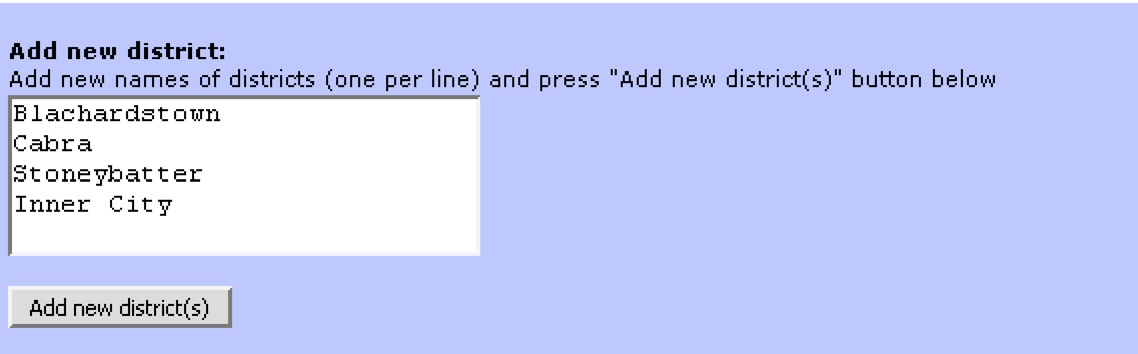

Figure 19. Adding new District name(s).

If the operation went through successfully, you will see *New district(s) added* message on the screen.

Adding new call classification to the Call System (Administrator only)

This operation can only be carried out by an operator with Administrator privileges. Choose *Add/Edit Classifications* in the main Administrator menu then you arrive at the split screen where you can edit the existing Classification name or add new ones.

IMPORTANT NOTE. Classification consist of two parts: *main classification* and *sub-classification*. To add new classification is a two step process. First, you need to add new main classification and then you need to add at least one new sub-classification in order to see the new main one on the list of the classifications. So, when you *Add/Edit Classifications* in the main Administrator menu you will arrive at the add/edit main classification page first and to switch to add/edit sub-classification page you need to click *Edit existing sub-classification names* link (see Figure 20).

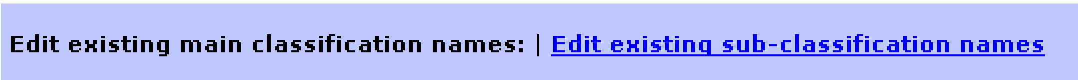

Figure 20. Main and sub-classification links.

To add new main classification

Use *Add new main classification* text box to add new main classification name(s) to the system. If you want to add more than one name in one go, list them one per line (see Figure 21) and press *Add new classification(s)* button when ready.

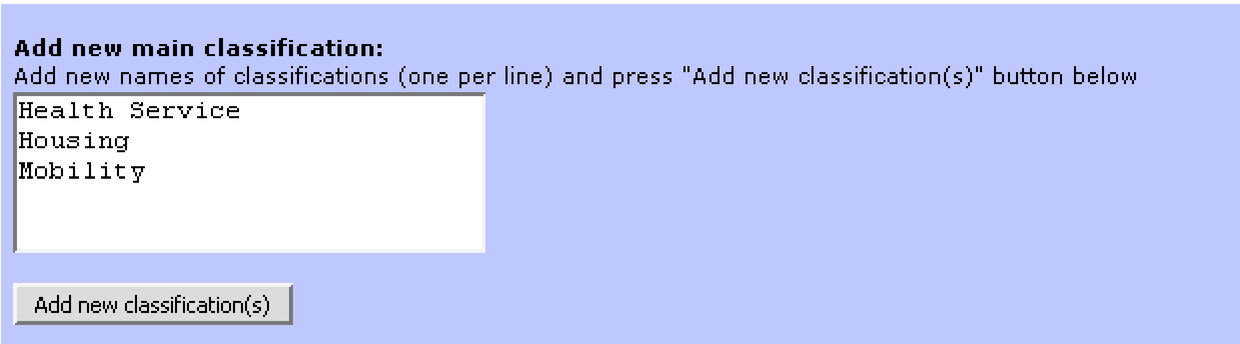

Figure 21. Adding multiple main classification names.

Once you added the new main classification(s) you need to add at least one sub-classification to each of them. Use *Edit existing sub-classification names* link to switch to sub-classification add/edit screen (see Figure 20).
In *Main Classification* drop down list choose the main classification you want to add a sub-classification to and add the new sub-classification name in to the text box below (see Figure 22).

If you want to add more than one sub-classification names in one go, list them one per line. Press *Add new classification(s)* button when ready.

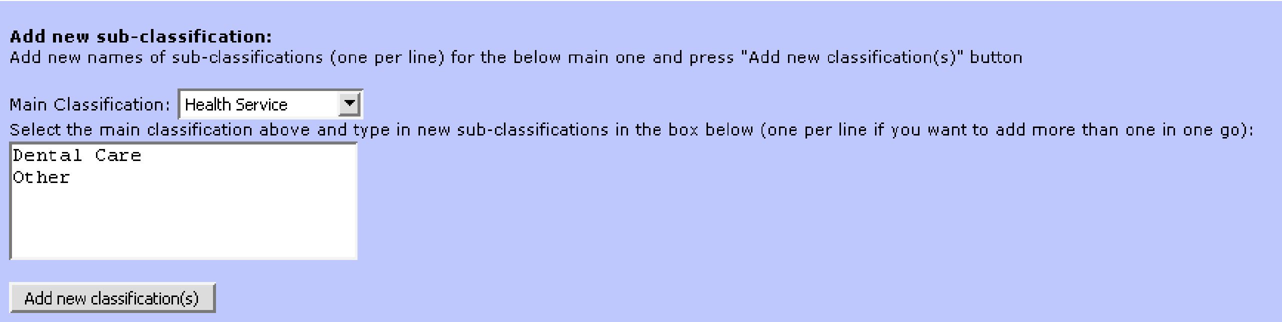

Figure 22. Adding new sub-classifications.

To edit the existing main classification

Use the top half of the *Add/Edit Classifications* screen. Choose the main classification name you want to edit in *Main classifications* drop down list and type in the new name for it in *New name for selected classification* drop down list (see Figure 23).
Press *Save the new name* when ready.

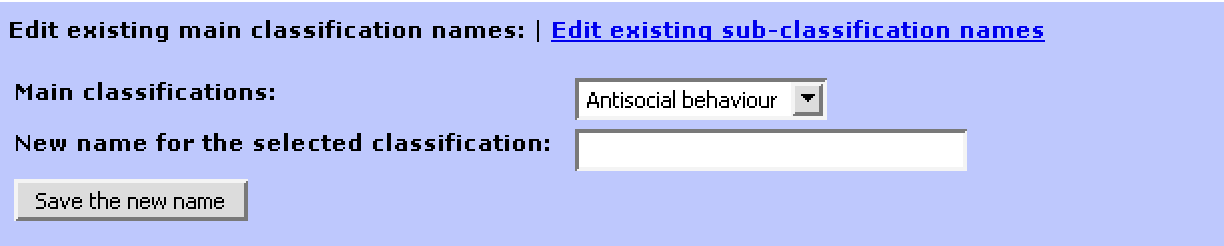

Figure 22. Editing existing main classification name.

To edit the existing sub-classification name

Use the top half of the *Add/Edit Classification* screen and switch to add/edit sub-classification names by clicking *Edit existing sub-classification name* link (see Figure 20). Choose the sub-classification name you want to change in *Sub-classification* drop down list and type in the new name in *New name for selected classification* field (see Figure 23).
Press *Save new name* button when ready.

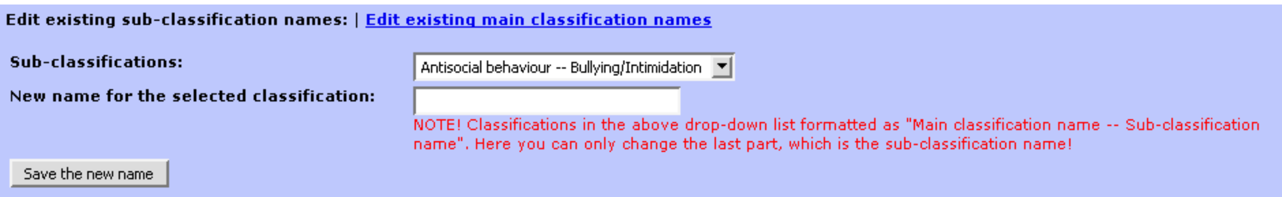

Figure 23. Editing existing sub-classification name.

Creating reports (Administrator only)

This operation can only be carried out by an operator with Administrator privileges. Choose *Report* in the main Administrator menu then on the next screen choose the criteria for the report.

NOTE. If you want to use multiple criteria (e.g. classification and district), please, tick the appropriate check boxes to the left from the criteria (see Figure 24). By default none is chosen!

When ready press *Submit* button.

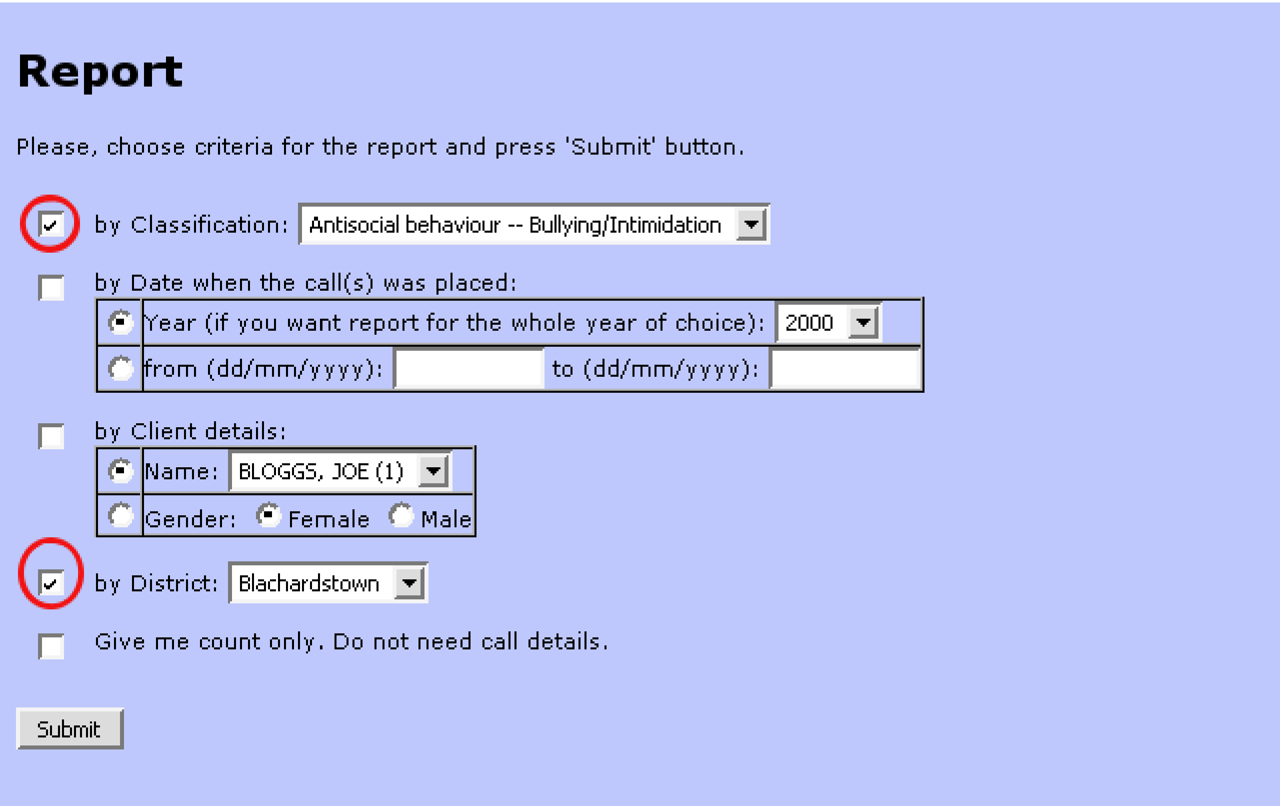

Figure 24. Choosing report criteria.

The report results will never have client names on it. This is done to protect clients privacy. If the report is bigger than 100 lines, the default Call System configuration will force the server to convert it into PDF format. You will be prompted to save the result in a file. If you have Adobe Acrobat Reader installed on your computer, you will be able to open the file immediately.

Through the Call System configuration you can change the PDF conversion parameter. It's not advisable to increase too much the number of lines before the result is forced into PDF, because it can lead to poor performance of your web browser.
If you want force the conversion into PDF regardless of the number of lines in the result, set the parameter to 0 (zero).

Call System configuration change (Administrator only)

This operation can only be carried out by an operator with Administrator privileges. Choose *System Configuration* in the main Administrator menu then on the next screen change the parameters you want to change.

IMPORTANT NOTE. Please, be careful when you embark on changing the parameters. DO NOT CHANGE ANYTHING UNLESS YOU KNOW EXACTLY WHAT YOU ARE DOING! If you do it the wrong way around, it may require direct access to the server to bring the system back to operational state.

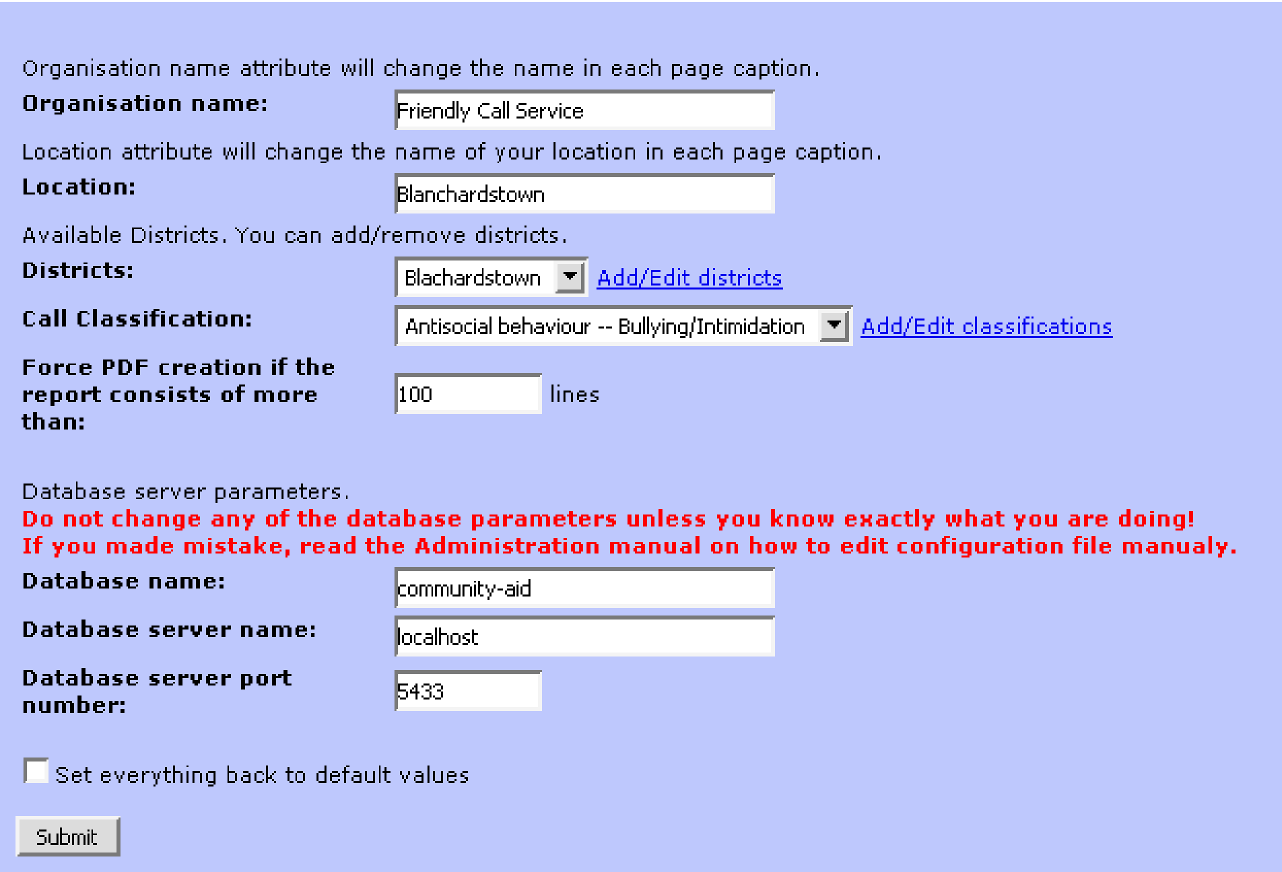

Figure 25. System configuration parameters.

Everything above the bold red warning (see Figure 25) is quite harmless to change. You can change *Organisation name* and *Location* which will change the caption of every page in your Call System accordingly.

Add/Edit districts and *Add/Edit classification* links will bring you to the same screens as if you go through the main Administrator menu.

Through *Force PDF creation if the report consists of more than XXX lines* configuration parameter you can change when report results will be forced into PDF format. It's not advisable to increase too much the number of lines before the result is forced into PDF, because it can lead to poor performance of your web browser.

If you want force the conversion into PDF regardless of the number of lines in the result, set the parameter to 0 (zero).

After you have changed the parameters to the values required, press *Submit* button to save it.

Quick data-only backup of the Call System (Administrator only)

This operation can only be carried out by an operator with Administrator privileges. Choose *Quick Database backup* in the main Administrator menu then on the next screen press *Backup* button. Once the backup is ready you will see *Get the backup file* button on the screen. Once pressed it will present you with the link to the backup file (see Figure 26). Click on the link and you will be prompted to save the file onto your local disk.

Figure 26. The link to the backup file.

Keep the file safe! You have you clients sensible information there.

In case of complete failure of the Call System server you can restore the data from the latest backup available to you. It make sense to take one at the end of the day at keep it off-site.