# University of Lethbridge



# Calls: User Manual

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**<u>Introduction:</u>** Hello and welcome to the user guide for the Calls Scheduling Software. First off thank you for choosing to use this for your scheduling needs. Before we jump into the tutorials on how to utilize this software lets cover some of the basic details of how and why we built the Calls scheduling software. Calls was designed with scalability and cross platform compatibility in mind we utilized a cross combination of JavaScript, PHP and MySQL to build the foundational framework on which this application runs; These design choices where made with the intent to allow scalability into a web based availability down the line if someone was interested as well as allowed us the ability to design a user friendly software that is functional on any platform (Microsoft Windows, Mac OS X, and Linux).

# Table of Contents:

*Topics are bookmarked links to the tutorial on general functions and use.

# First Time User Guide/Quick Setup:

This is a quick guide to help you get setup quickly, so that you can start generating schedules.

1.  Once installation is complete and you are able to access the application via the local host address (Ip) of your machine you will want to click on the Doctors Tab.

2.  From here you will want to add Doctors to your available scheduling pool as outlined in the directions/functions here.

3.  Once you have added your desired Doctors to your scheduling pool you will want to click on the Requests tab. Once on the requests tab you will want to input all the Doctors requested days on and off as per the listed instructions/functions here.

4.  Upon loading all the information that you need in order to generate your desired schedule you will want to select the calendar tab and hit the Create Schedule button (You will be able to do this for a couple months at a time but we recommend only doing it a month in advance in the event of new doctors, doctors leaving, etc) Functions for generating a schedule can be found here.

5.  Once you have generated your desired schedule you will be able to load your General and Specific Schedules via the Report tab. Once you are in the report tab you can follow the instructions on how to use the functions here.

6.  That should be all you need to get your scheduling software up and running quickly after completing the installation.

# Software Overview/Introduction:

In this section we outline the general overview/appearance of the application and the overall basic functions that are available under each tab (E.g. Doctors tab is where you will be able to add/remove Doctors from the scheduling pool). From here we will then branch into the more specific functions of each page and outline the intended method by which you will want to operate the software.

1. Upon loading Calls: Scheduling Software you will be introduced to a Calendar on the main page. This page is where you will be able to make manual edits to which Doctor is on call as well as check Past, Present and Future schedules.



2. By clicking on the Doctors tab in the software it will bring you to this page. Here you are able to add a Doctor, Update a Doctor (Update Information e.g. name and number) and Remove a Doctor from your scheduling pool (Add and Remove Doctor functions are based on Date). When adding a Doctor you will even be able to input previous work numbers for continued tracking of Doctor Statistics (It allows you track the values as Previous Weekdays, Previous Weekends and Previous Holidays worked to have a more accurate running total).

3. Next by selecting the Request Tab you will be brought to the following page. Here you are able to modify Doctor Availability by setting whether the Doctor wishes to be on/off on a certain date or date range by then selecting the date from the pop-up calendar for the start and end of the expected range.



4. Finally there is the Reports Tab where you will be able to make a selection for a given month and then generate a report for printing either an internal or an external report by selecting the appropriate radio button for the desired report and then clicking the "View Report" button available on the page (Internal Reports feature no header filled with clinic information while External Reports do).
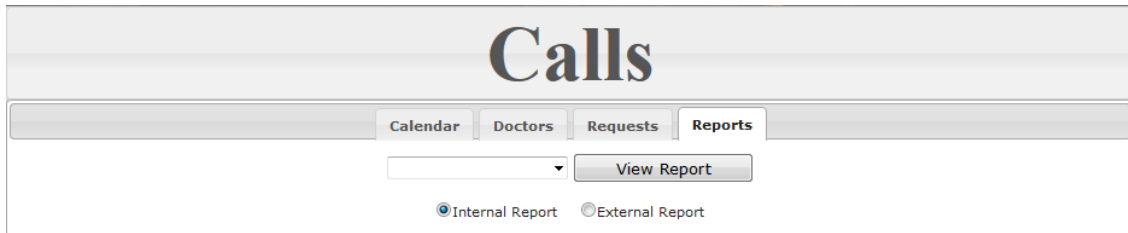
# Calendar Functions:

In this section we will give you a more specific overview of the functions available on the Calendar tab and how to go about using them. These features include the ability to manually edit which Doctor is currently scheduled on the Calendar, the ability to scroll through Past, Present and Future schedules and a function that will return you to the current date while reviewing your scheduling implementation.
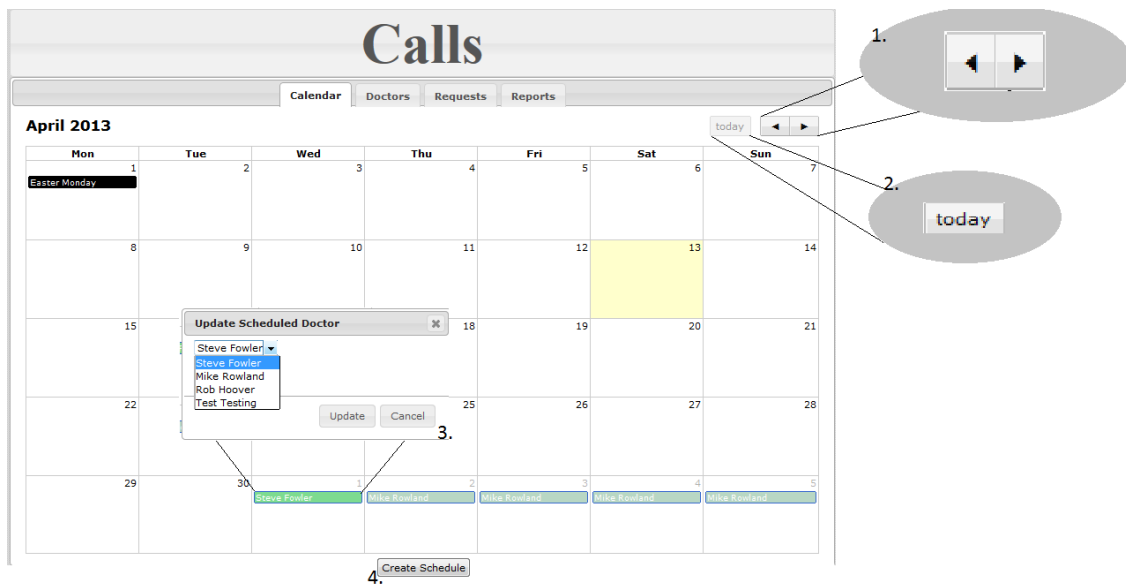


1. So as we have previously covered you have the ability to scroll through past, present and future schedules. This can be accomplished via the arrows located in the upper-right hand corner of the calls tab (we have enlarged it and placed a number 1 beside it for easy identification). By clicking the left arrow you are able to scroll back through your calendars, and by clicking the right arrow you are able to scroll forward through your calendars.

2. For feature number 2 there is a button labeled as "Today" by clicking this button it will return you to the current month based on today's date.

3. For feature number 3 by clicking on a name in the schedule it will pull up an associated frame featuring a drop down list with a pool of all currently available doctors. By clicking on a Doctors name and then clicking the update button you are able manually change who is available on that day. Oh and for weekends and holidays the scheduling software will automatically handle the balancing of that doctor over the course of those days (so no need to worry about ensuring that they are scheduled for all days on the weekend).

4. Finally feature 4 is the actual "Create Schedule" button by clicking this it will generate a schedule based on the current availabilities and workloads of the Doctors pool and output a viable schedule for use. Once the Schedule has been generated however the button will disappear to prevent accidental rescheduling of the current schedule. For the overall layout for this the schedule will have doctors color coded for easy recognition when viewing, also we have it configured that any requested days off show up as red and any requested days on will show up as green.

## Doctors Functions:

In this section we will give you a more specific overview of the functions available on the Doctors tab and how to go about using them. These features include the ability to

**Calls**

| Calendar | Doctors | Requests | Reports |

Select an Operation: Add a Doctor ▼    Add a Doctor ▼ **1.**
Add a Doctor
Remove a Doctor
Update a Doctor

First Name: Test
Last Name: Tester
Phone Number: 123-123-1234
Select Start Date: 2013-04-01
Previous Weekdays: 1
Previous Weekends: 1
Previous Holidays: 1_____

Add    **2.**

**3.** View Doctor Statistics

| Name | Start Date | End Date | Weekdays | Weekends | Holidays | Previous Weekdays | Previous Weekends | Previous Holidays |
|---|---|---|---|---|---|---|---|---|
| Rob Hoover | 2013-04-01 | | 14 | 6 | 1 | 0 | 0 | 0 |
| Steve Fowler | 2013-04-01 | | 14 | 6 | 1 | 0 | 0 | 0 |
| Mike Rowland | 2013-04-01 | | 15 | 4 | 0 | 0 | 0 | 0 |
| Rob | 2013-04-01 | | 0 | 0 | 0 | 0 | 0 | 0 |

1. Function 1 allows for you to make a formal selection of modifications that you wish to make whether it is "Add a Doctor", "Remove a Doctor" or "Update a Doctor". When you make a selection it will update the form accordingly so that you can interact and make changes as necessary. For "Add a Doctor" and "Update a Doctor" it will present similar forms except for updating a doctor lacks the Previous Weekdays, Weekends and Holidays fields.

2. The "Add" button as demonstrated above confirms a successful addition, this button will change based on your selection from the drop down listing explained above. The three statuses are Add, Remove and Update. If you have performed a successful implementation of the formal functions you will be presented with the following pop-up where "added" will also show up as "removed" for a removal and "updated" for a successful update.

Doctor added successfully!

OK
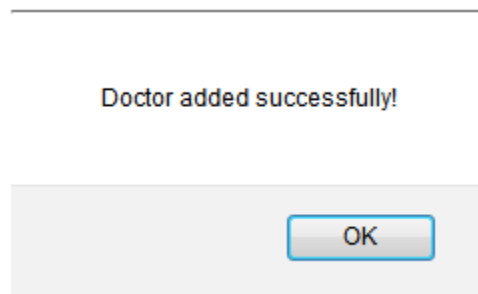
3. Function 3 is Statistics table that gives you all the Doctors work amounts there formal starting amounts prior to the implementation of this system as well as Doctors Start and End Dates.

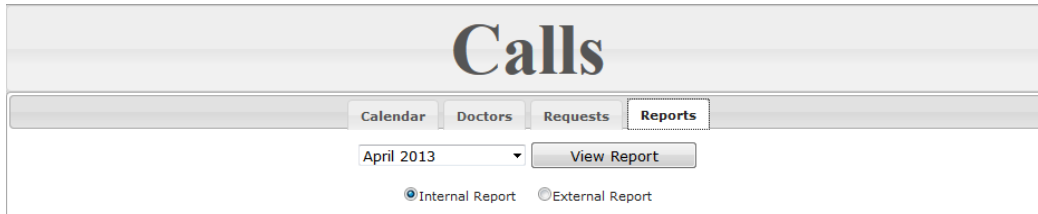## <u>Requests Functions:</u>

Here we will outline the overall use of the Requests tab and the functions available to control Doctors availability of wanting to be scheduled to be on call for certain shifts or wanting time off and not to be scheduled for certain shifts.

# Calls

| Calendar | Doctors | **Requests** | Reports |

Select a Doctor:  Steve Fowler ▾ 1.

Request Type:  ◉ Off  ○ On 2.

Select Beginning Date: [          ]
Select Ending Date: [          ]

[ Request ]

3.

**◀ April 2013 ▶**

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
|    | 1  | 2  | 3  | 4  | 5  | 6  |
| 7  | 8  | 9  | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 |    |    |    |    |

4.

Request made successfully!

1. For the initial function that we want to outline is the Drop down list that gives you the names of the Doctors you can select from those currently available. By selecting a Doctor you will then be able to specify they're availability constraints utilized for building current and future schedules.

2. For function 2 you can make a selection between the two radio buttons on whether you want the individual's requests to be either "on" or "off" depending on if they plan on taking a vacation or just have a desired ideal date they would like to work.

3. The calendar demonstrated in the above diagram will come up when you make a selection into the "Beginning Date" or "End Date" and allow you to just click on the starting range and ending range of a preferred set of days off or on allowing for easy and quick selection.

4. Finally the "Request" button once all other formal fields are filled in with their designated information you will be able to apply it to the database for future configurations of the monthly schedules visible on the calendar. Once the button is pressed a little text field will appear below the "Request" Button that says "Request made successfully!" confirming successful entry.

## Report Functions:

For the Reports Functions it has a limited scope of use it is designed for an ease of Internal and External Document use via the following layout.



1.  Overall the Drop-down List currently occupied with April 2013 is an availability of possible reports that can be generated and printed based on the availability of currently generated schedules.

2.  The radio buttons "Internal Report" and "External Report" while generated the designated report once the "View Report" button is selected. The following are sample of what each report looks like.

    Additional Notes: The primary differences between the reports are the external information at the top of the External document includes office Address and Contact Numbers; it also supports a custom logo that can be updated to reflect its designated clinic logo.

Internal:

**Schedule for April 2013**

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|---|---|---|---|---|---|---|
| | **1** Rob  Hoover | **2** Rob  Hoover | **3** Steve Fowler | **4** Mike Rowland | **5** Mike Rowland | **6** Mike Rowland |
| **7** Mike Rowland | **8** Steve Fowler | **9** Rob  Hoover | **10** Rob  Hoover | **11** Steve Fowler | **12** Steve Fowler | **13** Steve Fowler |
| **14** Steve Fowler | **15** Mike Rowland | **16** Mike Rowland | **17** Rob  Hoover | **18** Rob  Hoover | **19** Rob  Hoover | **20** Rob  Hoover |
| **21** Rob  Hoover | **22** Mike Rowland | **23** Steve Fowler | **24** Steve Fowler | **25** Mike Rowland | **26** Mike Rowland | **27** Mike Rowland |
| **28** Mike Rowland | **29** Steve Fowler | **30** Rob  Hoover | | | | |
| | | | | | | |

External:

LOGO LOGO LOGO

**Schedule for April 2013**
Some Place
1234 Some Street
(403) 333 - 4424
(403) 334 - 3131

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|---|---|---|---|---|---|---|
| | **1** Rob  Hoover | **2** Rob  Hoover | **3** Steve Fowler | **4** Mike Rowland | **5** Mike Rowland | **6** Mike Rowland |
| **7** Mike Rowland | **8** Steve Fowler | **9** Rob  Hoover | **10** Rob  Hoover | **11** Steve Fowler | **12** Steve Fowler | **13** Steve Fowler |
| **14** Steve Fowler | **15** Mike Rowland | **16** Mike Rowland | **17** Rob  Hoover | **18** Rob  Hoover | **19** Rob  Hoover | **20** Rob  Hoover |
| **21** Rob  Hoover | **22** Mike Rowland | **23** Steve Fowler | **24** Steve Fowler | **25** Mike Rowland | **26** Mike Rowland | **27** Mike Rowland |
| **28** Mike Rowland | **29** Steve Fowler | **30** Rob  Hoover | | | | |
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