User Manual

1. Overview

1.1.“What will this software do for me?”

The NeArc Call Log System will allow you to accomplish a variety of tasks. You can view the listing off all staff and houses in the database and print out custom or predefined reports.

2. How to start the software

To start the software, navigate to http://call_log.ne-arc.org/ in Internet Explorer, Firefox, or Safari. Log in with your credentials that were provided by the system administrator. From there, you are taken to the Home Page, which will display buttons for all the tasks you can perform, which currently include, Call Log, House Profiles, Reports, and the Administrator Page which is only viewable by system administrators.

3. How to perform typical tasks

3.1. Call Log - Once you have logged in, select the Call Log button.

3.1.1. View the Call Log

From the Home Page, click on the button labeled “Call Log.” This will redirect you to the Call Log page, which lists the full time and relief staff in the database. At any time while viewing or searching the Call Log, you may click any column title to order the current list according to the values in that column. Additional clicking of the column title will toggle the list between an ascending or descending order.

The far right column of the Call Log indicates the state of the First Aid, Adult CPR, and MAPS courses that the staff member has taken. If a staff member has not taken, or has taken but has let expire, one or more of the three primary courses then this column will contain a red box. If the staff has all three primary courses with none being past their renewal date, but one or more of the courses will become expired within one month of the current date, the column will contain an orange box. (See Figure 1)

3.1.2. Search the Call Log

At the top of the Call Log page, there are a number of search fields. You can search by a specific individuals name by typing it into the full name field and selecting “search.” As you type the characters of a name, an autocompletion list directly below the search field will form containing the employees whose names match or contain the characters entered. The remaining search fields will also allow you to search by gender, certifications, home number, cell number, pay rate, or any combination of these. You can select the gender by clicking the appropriate radio

button near the label and then select “search”. To search by phone, enter the staff member’s phone number into the phone field and then select “search.” To search by certifications, select the appropriate check boxes near the label and select “search.” When searching by pay rate there will be two fields available. These allow you to specify the lower and upper bound of the pay rates of employees for which you are searching. The list below the search field, which previously contained all employees, will be updated to display only those matching the entered criteria. If no employees match the criteria a message will be displayed saying no results were found.
(See Figure 1)

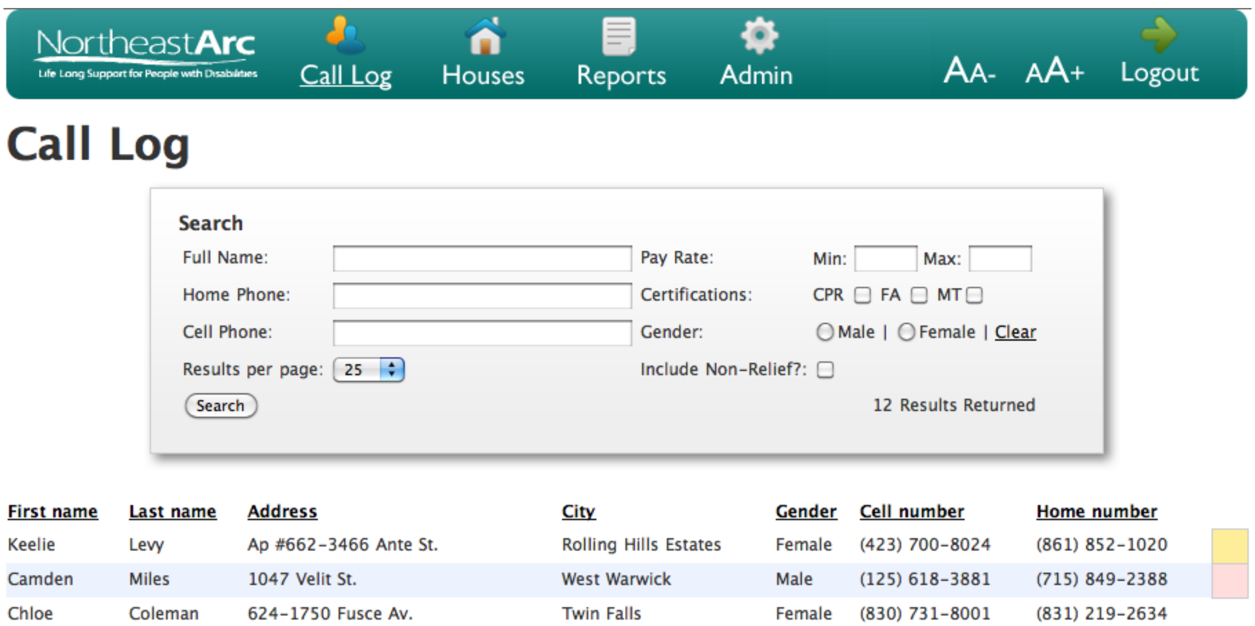

Figure 1: Call Log Page

3.1.3. View a Staff Profile

To view a staff member’s profile, you may click anywhere on their designated row in the Call Log. You can find their row to click by scrolling through the Call Log or by using the searching function.
(See Figure 2)

3.1.4. Edit Notes in a Staff Profile

To edit notes in a staff profile, select the desired staff member from the Call Log to be brought to their page. From there, click on the heading or contents for one of the following: Experiences and Preferences, Schedule and Availability, Skills and Limits, or Contact Info and Notes. Add or edit any information you want and when you are

done, click the “ok” button to save and disable editing. You may also click the “cancel” link to discard any changes.
(See Figure 2)

3.1.5. View Course Information

On the right side of the staff page is a list of courses which that staff member has taken. If the course has a red background color, the current date is after the course’s renewal date, and is therefore invalid. If the course will expire within one month of the current date, the background color will be orange.

If the staff is a Non-Res staff member (manually entered in the system by a System-Admin), there will be an Add Course option below the list of courses. This is because Residential staff have their course information maintained in the HR system and it is therefore imported along with the Residential staff, but Non-Res staff have no source of course information, so manual addition of courses and expiration is available. Consequently, to avoid inconsistency and duplication of data, the Add Course option is NOT available for Residential staff that are imported from the HR system. Their course information should be updated and maintained in the HR system with this system merely reflecting the information in the HR system.

In addition to indicating whether listed courses are within their expiration or not, if a staff member has not taken one of the three primary courses: First Aid, Adult CPR, or MAPS, the missing course(s) will be listed at the bottom of their course list.
(See Figure 2)

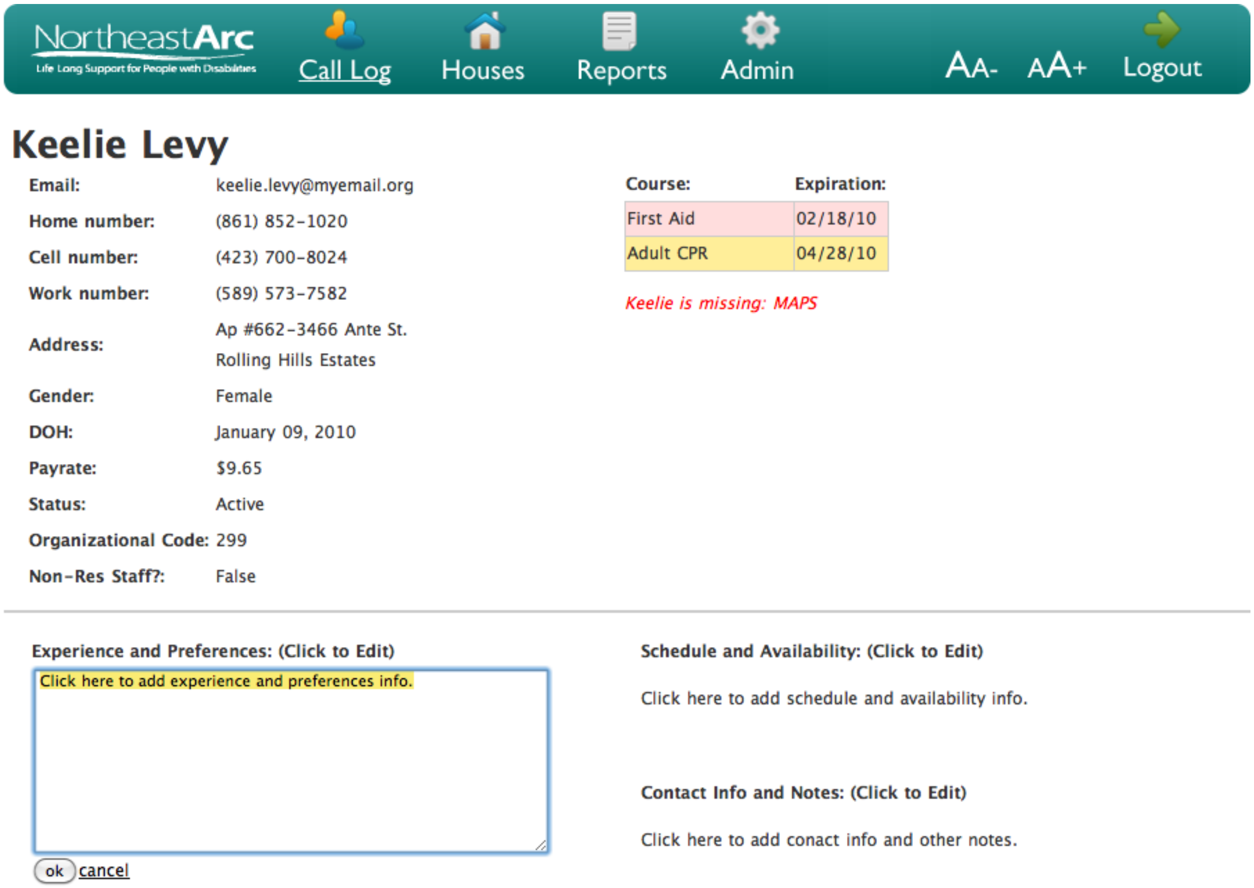

Figure 2: Individual Staff Profile Page

3.2. House Profile - Once you have logged in, select the Houses button.

3.2.1. View the House Profile List

To view the list of House Profiles, click on the Houses button from the Home Page. You will then be redirected to a page containing all the Houses currently in the NeArc database.
(See Figure 3)

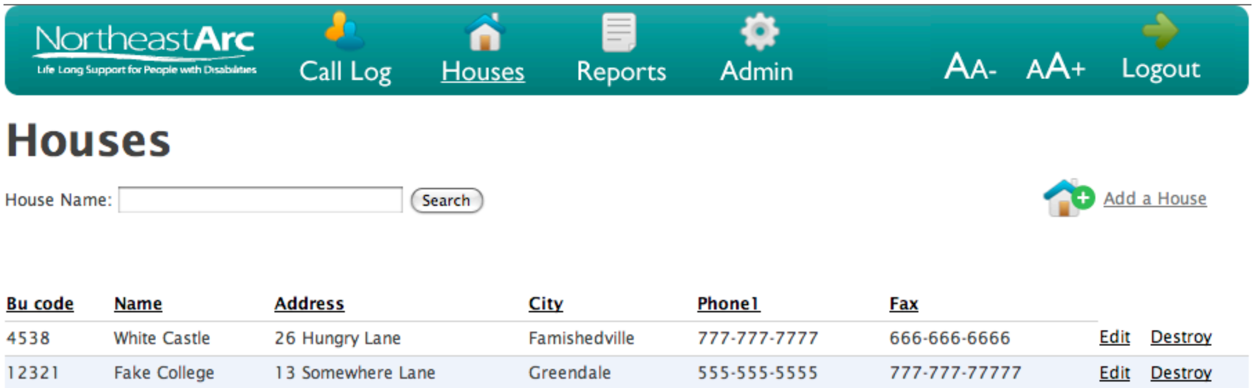

Figure 3: House Profile Page (Administrator View)

3.2.2. View a specific House Profile

To view a specific House Profile, click on the house's row from the list of houses in the House Profile page. You will then be redirected to the specific house's page. (See Figure 4)

3.2.3. Edit a House Profile

To edit a house profile, select the desired house from the House Profile list to be brought to its page. From there, select the "edit" link at the top right of the profile to enable the editing process. Add or edit any information you want and when you are done, click the "Update" button to save your changes.
(See Figure 4)

3.2.4. Add Staff to House

Navigate to a house's profile where you would like to assign a staff. On the right side of the page click the "Assign Staff" link below the listing of staff currently assigned to the house. Fill in the form with the staff member's name, their position type, and their position. Then click "Add Staff to House".
(See Figure 4)

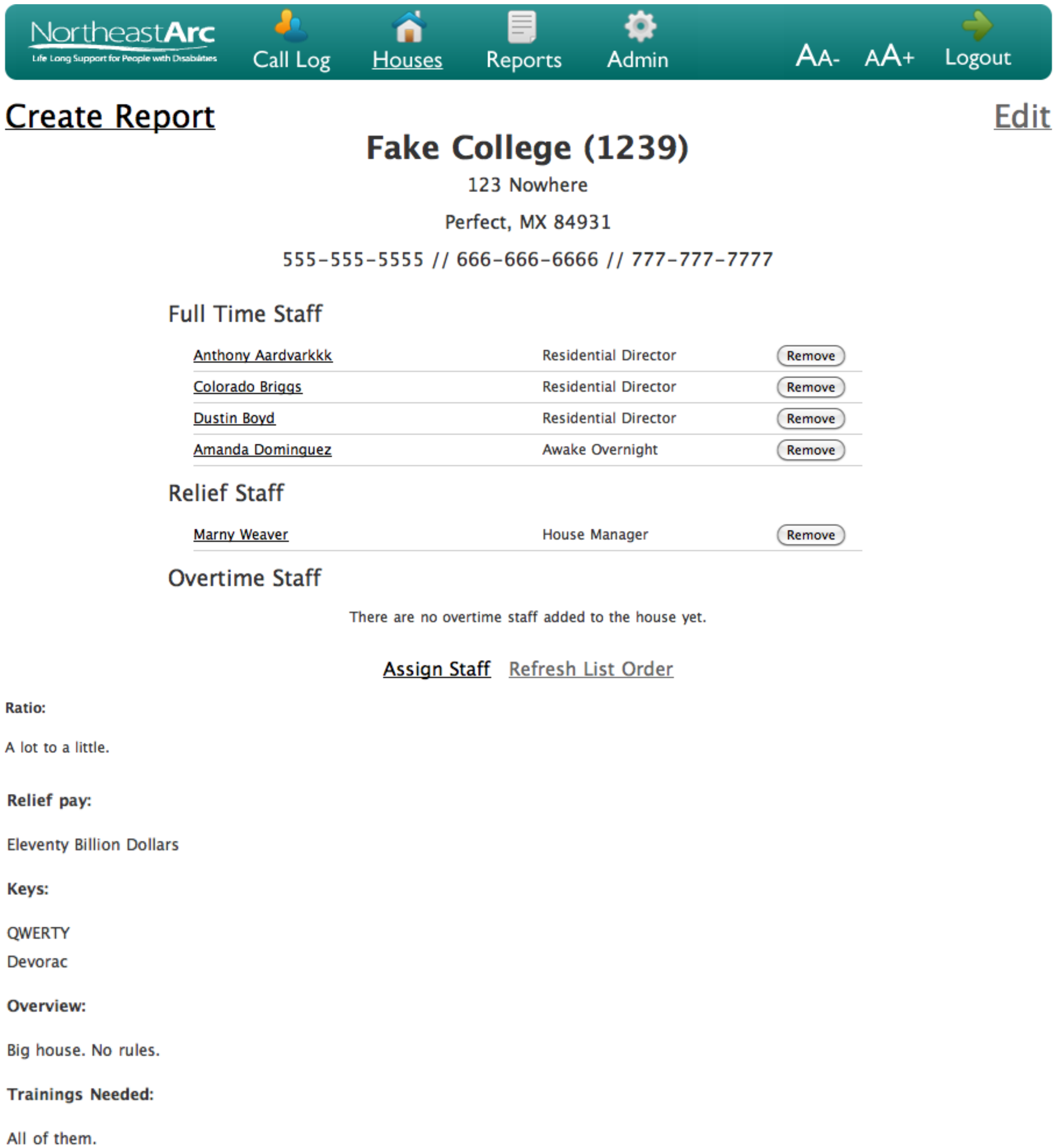

Figure 4: Specific House Profile

3.3. Reports - Once you have logged in, select the Reports button.

3.3.1. Create Staff Report

To create a staff report, select the desired report button. There will then be a generated PDF for you to view, save, or print.
(See Figure 5)

3.3.2. Create House Report

To create a house report, select from the House Profile list the profiles you wish you print. Once you have finished selecting the profiles you want, select the "Create Selected House Reports" button. There will then be a generated PDF for you to view, save, or print. If no houses are selected then a report containing all houses will be generated. Alternatively, you can create a single house report by clicking the "Create Report" link located on the top left corner of the house individual page. (See Figure 5)

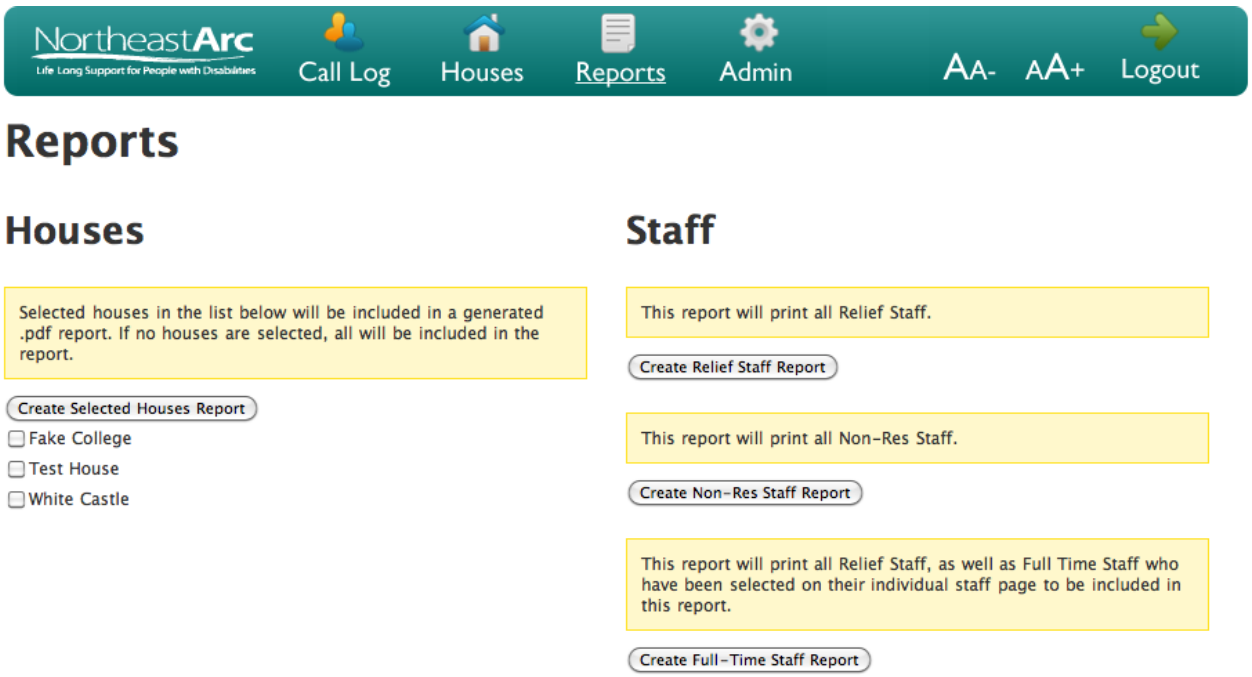

Figure 5: Generate Reports Page

3.4. Forgot / Change Your Password

If you have forgotten your password, on the login page, click the link next to "Forgot your password?" and enter your email address to have a new password emailed to you (if you are a current user in the system). After you click the "Submit" button, you will receive an email with a new password to log in with, and once you log in you will be given the option to change your password.

If you have not forgotten your password but would like to change it, log in, and on the home page click the "Change Your Password" link in the grey submenu. You will be taken to a new page where you can enter a new password. Click the "Change" button to update your password. You must use this password at subsequent logins.

4. System Administrator Tasks - Once logged in, select Administrator Button

4.1. Create User Account

Fill in the form on the left hand side of the page with the appropriate information. Then click the "Add User" button to create the new user. An email will be sent to the user with their login information. The new user will be able to log in using their full email address or a shortened username which is created from the characters left of the @symbol in their email (e.g. example@nearc.org or example)
(See FIgure 6)

4.2. Grant House Administration Privileges to a User

All system administrators have permission to view and edit all house profiles. By default, house administrators may view but not edit all houses. To grant a house administrator editing privileges, a current system administrator must click the appropriate user in the list on the administrator home page, fill in the form with the desired house name and click "Add User to House". The user will then be able to edit the corresponding house profile. A system administrator can remove editing privileges by clicking the appropriate user in the list on the administrator home page and clicking the "Remove" button next to the appropriate house.
(See Figure 6)

4.3. Remove User Account

On the right of the Administrator page there will be a list of current users. Click the 'remove' link to the right of the user you wish to remove. A dialogue box will appear warning that all user information will be lost, and you will be asked to confirm that you would like to remove the user.
(See Figure 6)

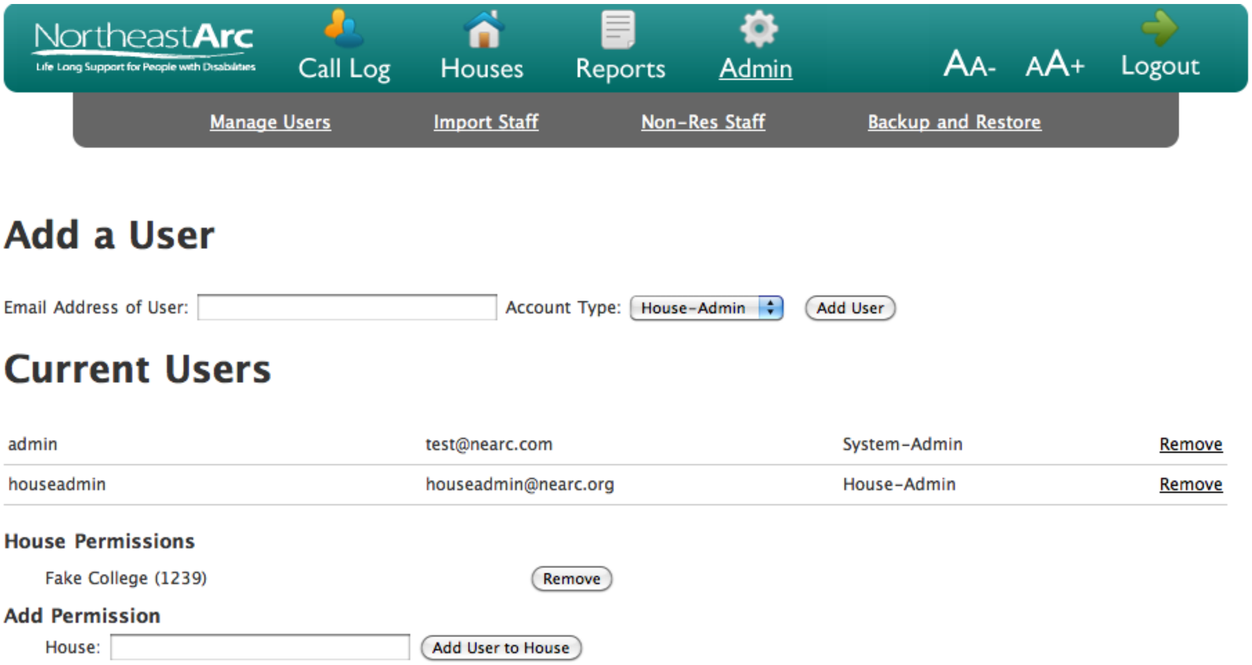

Figure 6: Admin Page - Manage Users

4.4. Add Non-Res Staff

From the Administrator home page click on the Non-Res Staff link in grey submenu on the top of the page. From there, click the "Add Non-Res Staff" link. Fill in the form that will appear with the appropriate information, and click the "Create" button. The new Non-Res staff will now be searchable in the Call-Log and appear in the list below the "Add Non-Res Staff" link on the previous page.
(See Figure 7)

4.5. Edit Non-Res Staff

In the Non-Res Staff section, click the "Edit" button that appears to the right of the name. You will be taken to a new page where you may edit any of the information. Click on the "Update" button to save changes.
(See Figure 7)

4.6. Remove Non-Res Staff

In the Non-Res Staff section, click the "Remove" button that appears to the right of the name. A dialogue box will appear and you will be asked to confirm that you would like to remove them.
(See Figure 7)

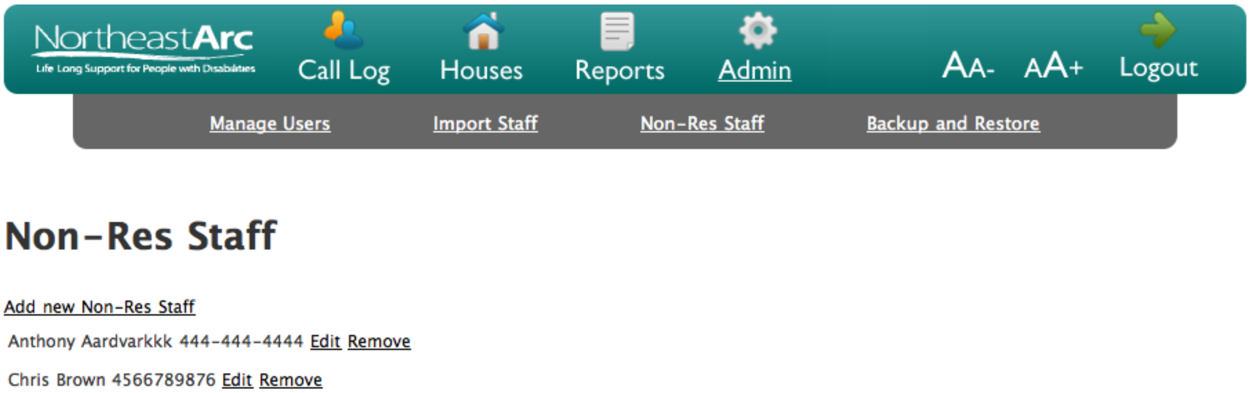

Figure 7: Admin Page - Non-Res Staff

4.7. Create House Profile

From the home page click the Houses button. Click the “Add a House” button at the top of the screen. You will be redirected to a page where you will be prompted to fill in all the appropriate House Profile information. After all information has been entered click the Submit button located at the bottom of the page.
(See Figure 8)

4.8. Remove House Profile

From the home page click the Houses button. Click the ‘Destroy’ link that is located on the right side of the House Profile’s row. A dialogue box will appear confirming that you would like to remove this house.
(See Figure 8)

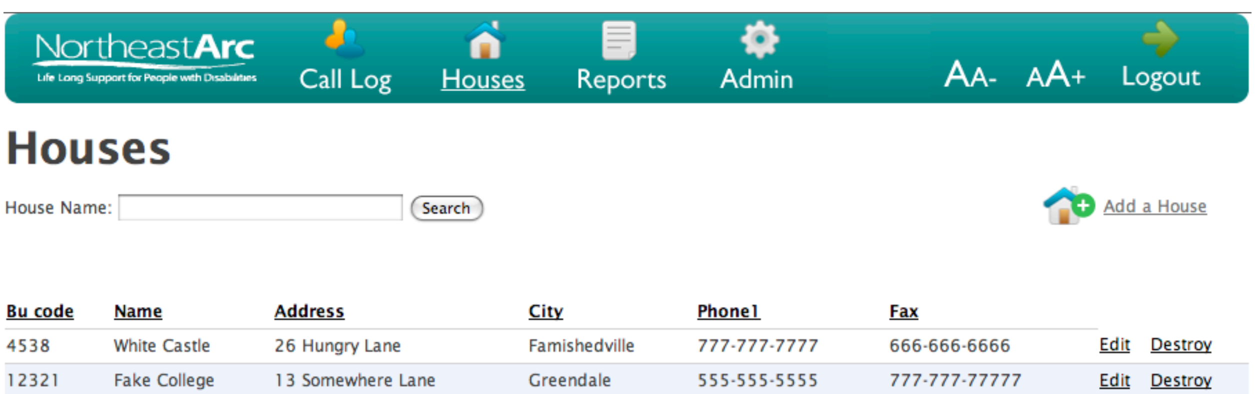

Figure 8: House Profile Page

4.9. Import HR Information

From the home page click the Admin button. Click the "Import Staff" link in the grey submenu located at the top of the page. Click the "Browse" or "Choose File" button. A file selection window will appear. Select the latest HR Info comma separated values (.csv) file and click "Choose" or "Ok". Next, click the "Import Data" button and all staff information in the Call Log will be replaced by the information in your imported .csv file. **Note:** once the import button is clicked, all previous staff information will be deleted before new information is added. The Call Log will strictly reflect the staff in the HR system, and any staff member removed from HR's system, will be removed from the Call Log system with the exception of Non-Res staff. (See Figure 9)

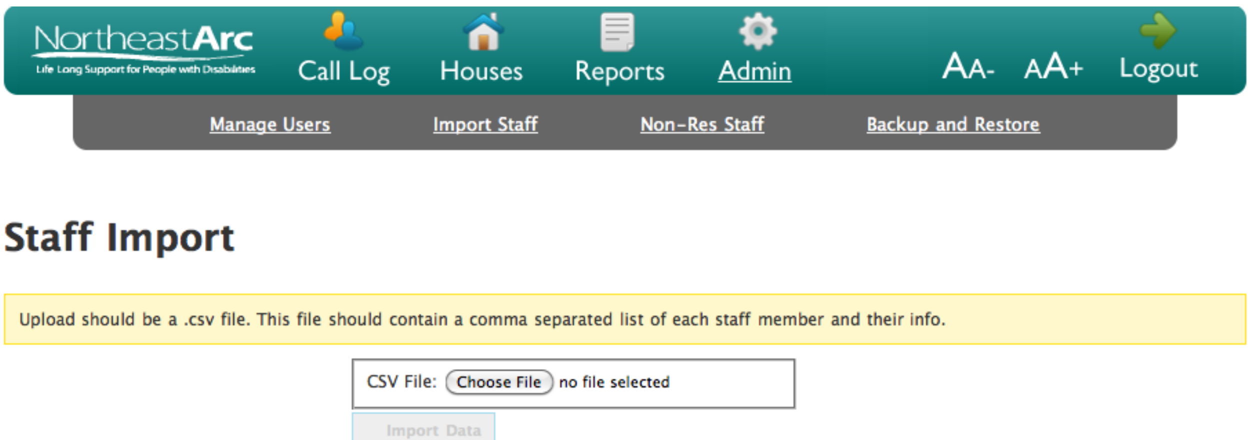

Figure 9: Admin Page - Import Staff

4.10. Import Database Backup

From the home page click the Admin button. Click the "Backup and Restore" link in the grey submenu located at the top of the page. Click the "Browse" or "Choose File" button in the restore section. A file selection window will appear. Select the database file you would like to recover from and click "Choose" or "Ok". Next, click the "Restore from Backup" button and the database will be restored to the state it was in when the backup was created.
(See Figure 10)

4.11. Export Database Backup

From the home page click the Admin button. Click the "Backup and Restore" link in the grey submenu located at the top of the page. Click the "Backup" button in the Backup section at the top of the page. A file save window will appear. A database

backup with the file name "Call_Log_Backup[YYYY_MM_DD].sql" will be created and downloaded through your browser. **Note:** each browser handles downloads differently, you may be asked where you would like to save the backup to, or your browser may have a default download location specified where the backup will be automatically saved. You are advised to copy the backup to external media which should not be kept at the same site as the system. This file is not encrypted so don't let the south-west-arc get a hold of it.
(See Figure 10)

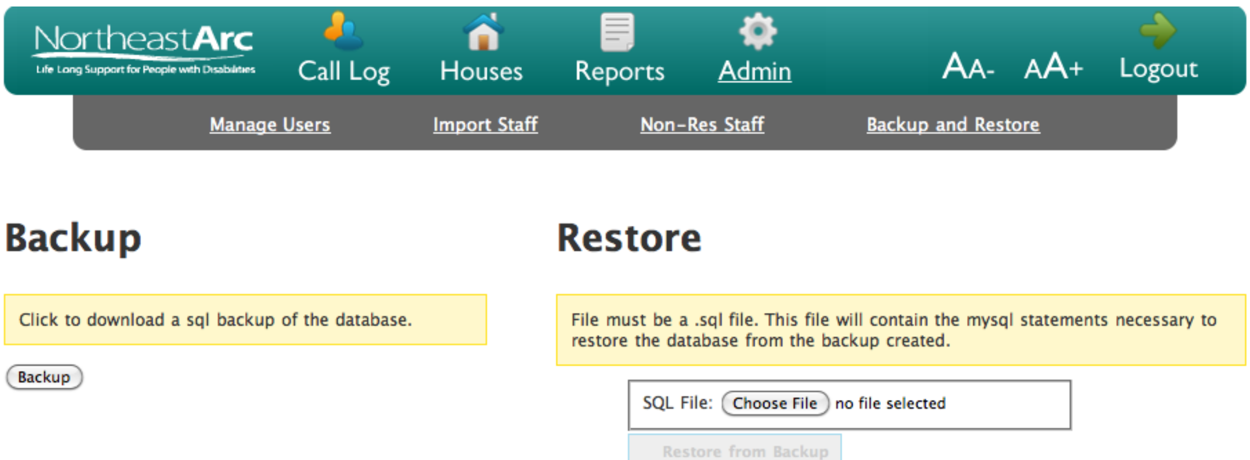

Figure 10: Admin Page - Backup and Restore

5. Menus

Navigation Bar - listed at the top over every page

- NeArc Logo Image Link - Link to Home Page
- Call Log Image Link - Link to Call Log Page
- Houses Image Link - Link to House Profile Page
- Reports Image Link - Link to Reports Page
- Admin Image Link (Will show for Administrators Only) - Link to Administrator Page
- Decrease font size Image Link – Decrease the current font size
- Increase font size Image Link – Increase the current font size
- Log out Image Link – Logout current user
  (See Figure 11)

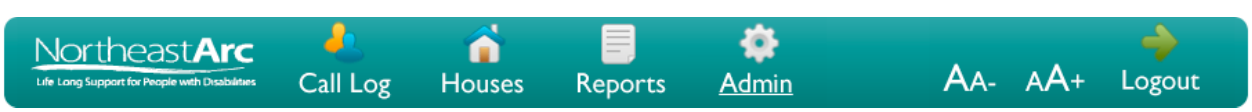

Figure 11: Non-Administrator Navigation Bar

6. Error Messages

Failed Log In Error - This error will appear on a failed log in attempt, which is the result of either inputting the wrong credentials or not having a user account for the system. If you have forgotten your password click the link next to “Forgot your password?” and enter your email address to have your password emailed to you (if you are a current user in the system). After you click the “Submit” button, you will receive an email with a new password to log in with, and once you log in you will be given the option to change your password.

Import HR Information CSV File Upload Error - This error will indicate that the selected file to upload into the database was unsuccessful. This will occur if there is a connection error with the server. Trying to upload the file again may fix this error. If the problem persists contact your system administrator.

Import HR Information CSV File Wrong File Type Error - This error will indicate that the client selected a file type that was not a CSV file. They will be told they tried to upload an incompatible file type. You may receive a 500 error if there was an issue importing the csv file. Double check to make sure you selected the right file and the file is formatted correctly. A list of the correct column headers can be found on the staff import page of the system.

Export Database Backup Error - The file system will generate an error message if there is insufficient room for the backup or if the client is disconnected during the backup process.

Import Database Error - This error can occur for two reasons. If the client tries to load an incorrect file type, or if the client is disconnected during the import process. A 500 error may occur, make sure the file selected was one created during an export. If disconnected during the import process, make sure you have an active internet connection and try again.

Add Non-Res Staff Error - This error will occur if the user has left a field blank during the creation of an Non-Res staff member for the database. It will indicate which field was left blank. Fill in the missing information and resubmit.

Modify Non-Res Staff Error - This error will occur if the user has left a field blank during the modification of an Non-Res staff member for the database. It will indicate which field was left blank. Fill in the missing information and resubmit.

Add User Account Error - This error will occur if the user has left a field blank during the creation of a user account for the database or if the given email already has a user account. If there was a field blank, it will indicate which field was left blank. Fill in the missing information or use another email address and resubmit.

Add House Profile Error - This error will occur if the user fails to fill in all required fields for the House Profile. The error will indicate which fields were not filled in. Fill in the missing information and resubmit.

Page Not Found Error - This error will be displayed if either the user types in a manual url that doesn't exist or they click on a link that doesn't exist.