Innisfree Village Scheduling User Manual

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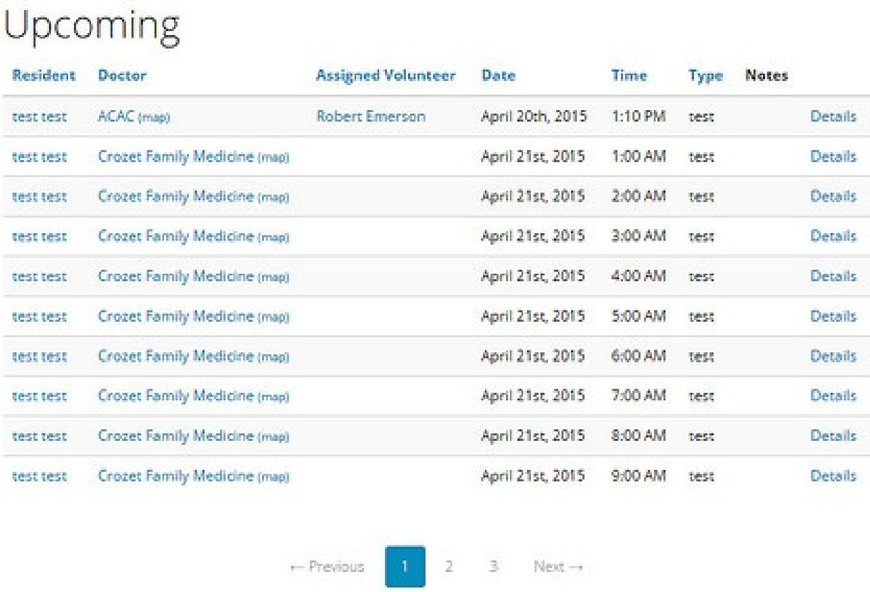
Basic Information

Navigation

Navigating the system is done by clicking internal links shown in navigation bar at the top of each page, as show in the screenshot below.

This navigation bar contains links to home page that shows appointments, as well as to the house list, the doctor list, the car reservation system and the list of system users. On smaller screens, this navigation bar will collapse to a single button that can be clicked to reveal the entire bar.

In addition to using this navigation bar, there are number of links on each page. For instance, on the home page, users are shown a list of the upcoming appointments. Each line of this list contains several links, as shown below.


Upcoming

Resident	Doctor	Assigned Volunteer	Date	Time	Type	Notes	
test test	ACAC (map)	Robert Emerson	April 20th, 2015	1:10 PM	test		Details
test test	Crozet Family Medicine (map)		April 21st, 2015	1:00 AM	test		Details
test test	Crozet Family Medicine (map)		April 21st, 2015	2:00 AM	test		Details
test test	Crozet Family Medicine (map)		April 21st, 2015	3:00 AM	test		Details
test test	Crozet Family Medicine (map)		April 21st, 2015	4:00 AM	test		Details
test test	Crozet Family Medicine (map)		April 21st, 2015	5:00 AM	test		Details
test test	Crozet Family Medicine (map)		April 21st, 2015	6:00 AM	test		Details
test test	Crozet Family Medicine (map)		April 21st, 2015	7:00 AM	test		Details
test test	Crozet Family Medicine (map)		April 21st, 2015	8:00 AM	test		Details
test test	Crozet Family Medicine (map)		April 21st, 2015	9:00 AM	test		Details

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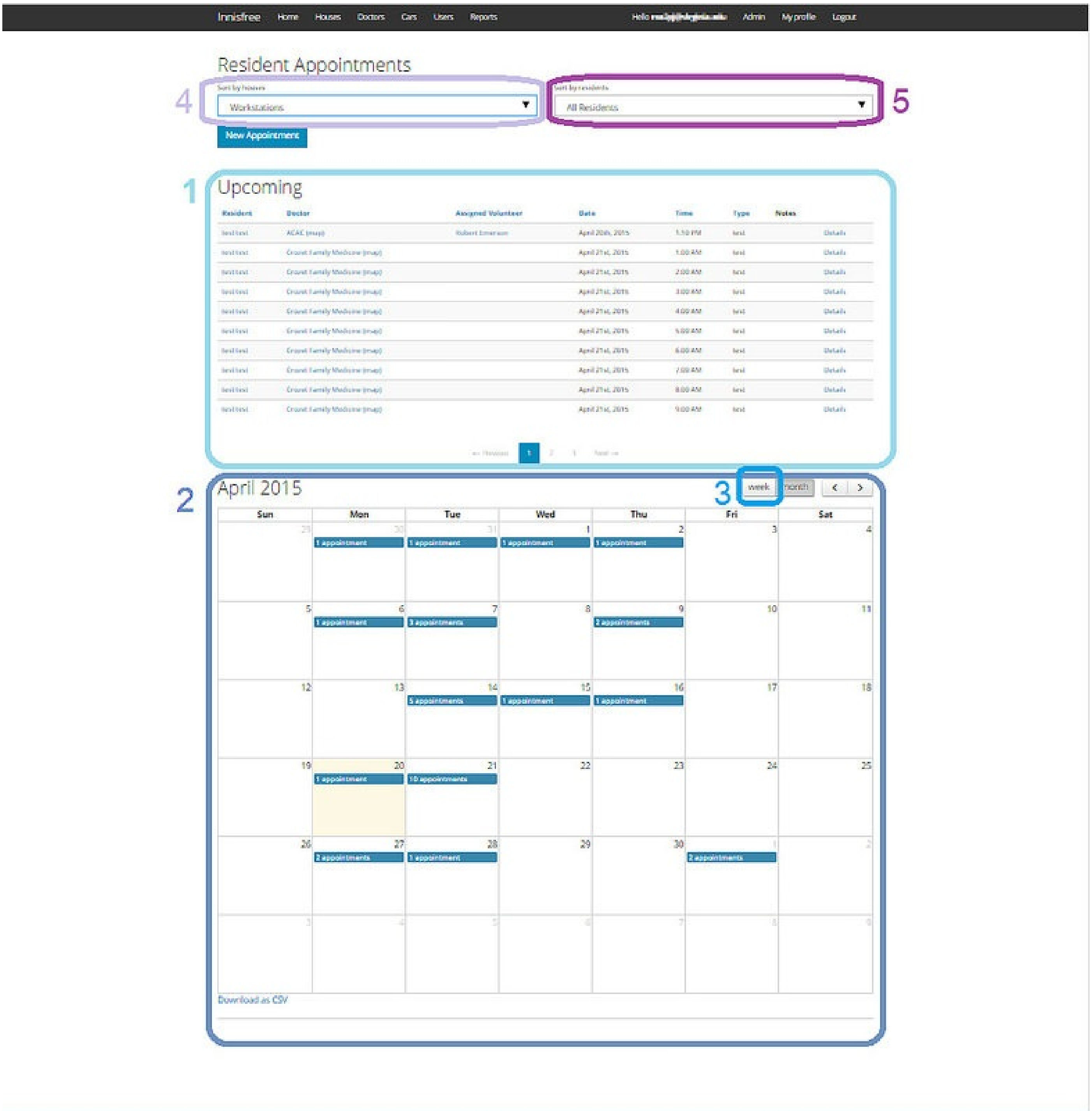
The first few links take you to a brief profile for that co-worker, doctor or volunteer. The fourth link "Details" will take you to the appointment details page, allowing for simple navigation to each appointment.

Roles

There are 3 basic roles in this system; the workstation head role, the volunteer role and the administrator role. The workstation head role has the least privileges, and can only see the appointment schedule to determine if a co-worker is not present due to an appointment. Volunteers more power, able to view all appointments and create, edit, and cancel appointments for residents in their house. Administrators have the most priviledges, as they are able to view, create, edit, cancel, and delete all appointments. Admin users are also able to create and edit residents, houses, doctors, and users and run reports.

Workstation Head Role

Appointments (Home screen)



This homepage allows for viewing appointments. Ten upcoming appointments, sorted by date, are displayed in a list(1) above a calendar that provides a monthly(2) or weekly view(3) for appointments. This list of 10 appointments is paginated, so you can click the buttons at the bottom of the list to see future appointments.

Just above the list of upcoming appointments are two dropdown boxes. These dropdowns are used to filter the list of upcoming appointments and the calendar view. The house dropdown(4) allows you to only see appointments for the selected house, while the resident dropdown(5) shows only the appointments for the selected co-worker.

To view a single appointment, you can click the “details” link for that appointment from the list of appointments. You can also click on a calendar day, and then click the “details” link for the desired appointment. This single appointment view shows the same information as the list of upcoming appointments, but also provides a Google Map window to show where the doctor is located.

Houses

This provides a listing of all Innisfree houses, along with the house’s phone number and the volunteers and co-workers living there. Full-time staff members are in the “Office Staff” house, while workstation volunteers are in the “Workstations” house.

Clicking on the name of a co-worker on this page will take you to their upcoming appointments. To see the contact information for a staff member or volunteer, simply click on their name.

Doctors

This page provides a listing of all of the medical coordinator approved doctors. This list can be sorted by doctor name, type, address and phone number, by clicking on the heading of each column. Clicking on the address of a doctor will bring that location up in Google Maps.

Users

This page provides a listing of all the scheduling system users. To sort this list by name, simply click on the column heading “Name.” This list can also be sorted by house, email address, phone number, and role.

My Profile

This page shows information about the currently logged in user. To change your name, phone number, email address, email preferences, or password, simply navigate to this page and click the “Edit My Profile” link. Then, fill in the requried field and click the “Update User” button.

Cars

This page shows car reservations.

Making a Car Reservation

To make a new reservation, click the “New Reservation” button. Then, use the user drop-down to select the user who is reserving this car, use date picker to select the date for your reservation, and use the time drop-downs to select start and end times. Once you’ve done this, click the “See Available Cars” button. This will take you to page that shows you your reservation details. This page also has a drop-down menu that lets you select which car you would like to reserve, and a text field where you can put the purpose for your reservation. This allows other volunteers to ride with you if possible. Once you’ve filled out the fields on this page, click the “Save Reservation” button. This will save your reservation and take you back to the calendar to view it.

Deleting a Car Reservation

To delete a reservation, click on it in the calendar. This will take you to the individual reservation page. On this page, click the “Delete Reservation” link and click “OK” on the pop-up window. Your reservation will be deleted and the reservation calendar will no longer show it.

Volunteer Role

Appointments

In addition to viewing appointments (as shown in the Appointments section for Workstation Heads), volunteers can also create or edit appointments for co-workers in their house.

Creating a New Appointment

To create a new appointment, click the “New Appointment” button on the appointments page. Use the drop-down boxes to fill in the form, and then click the “Create Appointment” button. The “Resident,” “Doctor,” and “Appointment type” fields must be filled out before an appointment can be created.

The Resident and Volunteer drop-down boxes only show Residents and Volunteers in the same house as the user creating the appointments. This page also contains the paginated list of upcoming appointments, so volunteers can coordinate appointments if possible.

Once the appointment is created, the user is taken to the individual appointment page for that appointment. You can edit an appointment by clicking the “Edit” link under the appointment information, or go back the the main appointments page by clicking the “Back to Appointments” link. You can also continue creating appointments by using the “New Appointment” button, or set a reminder to schedule an additional appointment by using the “Set Reminder to Schedule Follow-Up Appointment” button.

Editing an Existing Appointment

To edit an appointment, you must go to the individual appointment page for that appointment and then click the “Edit” link. This will allow you to update the resident, doctor, volunteer, date, time, appointment type and notes for that appointment. Once you have changed the desired fields, you simply need to click the “Update Appointment” button for your changes to be submitted.

The drop-down boxes on this page have the same restrictions as on the new appointment page, and the “Resident,” “Doctor,” and “Appointment type” fields must be filled out before the appointment can be updated.

Houses, Doctors, Users, My Profile, Cars

See these entries under the Workstation Head Role

Administrator Role

Appointments

To view, create, update or cancel appointments, see this entry under the Workstation Head Role and the Volunteer Role. The main difference between Administrator users and Volunteer users is that administrators can create appointments for any co-worker. Administrator users are also able to create new appointment types, cancel, and delete appointments.

Cancelling an Existing Appointment

Cancelling an appointment makes it clear the appointment is not happening, by crossing out every field when viewed in the upcoming list or in the calendar, but does not delete the appointment and all of its associated data. To cancel an appointment, click the “Details” link for that appointment, and then click on the “Cancel” link that appears under the appointment notes.

Deleting an Existing Appointment

Deleting an appointment removes all traces of that appointment from the system. To delete an appointment, click the “Details” link for that appointment, and then click on the “Delete” link that appears under the appointment notes.

Creating a New Appointment Type

Appointment types are useful for identying what type of doctor a co-worker is visiting. To create a new appointment type you should go to the new appointment page. From this page, you click the “Manage Appointment Types” button, enter the name of the new appointment type to add, and click “Save.” Currently trying this from the edit appointment page will not work.

Houses

Similar to appointments, administrator users can create, edit and delete houses. Administrators can also create new residents from this page. See this entry under the Workstation Head Role for more information on viewing houses.

Creating a New House

Click the “New House” button from the Houses page, enter the house name and phone number, and then click “Create House.” The name field is required, while a phone number is quite handy.

Editing an Existing House

Click the “Edit” link next to the house name, update the house name and phone number, and then click “Update House.” The name field is required, while a phone number is quite handy.

Deleting an Existing House

Click the “Delete” link next to the house name, and then click “Ok” in the pop-up box. This will remove the house from the system, but not its volunteers or co-workers.

Doctors

See this entry under the Workstation Head Role to view doctors. Administrator users also have the ability to create, edit and delete doctors.

Creating a New Doctor

Click the “New Doctor” button, fill out the fields, and then click “Create Doctor.” The doctor name must be filled out to save the doctor.

Editing an Existing Doctor

Click the “Edit” link in the same row as that doctor, update the field you want to edit, and then click the “Update Doctor” button to save your changes.

Deleting an Existing Doctor

Click the “Delete” link in the same row as that doctor, and select “Ok” from the pop-up window. Deleting a doctor will cause that doctor to be removed from the system and set all appointments that previously had that doctor to having no doctor.

Users

See this entry under the Workstation Head Role to view a list of users. Admin users are also able to create, edit and delete existing users.

Creating a New User

Click the “New User” button on the Users page, fill out the fields and then click “Create User.” The user’s name, email, house and password are all required.

Editing an Existing User

Click the “Edit” link in the same row as that user’s name and fill in the fields you wish to change. If you want to change the password, you must also enter the current password as authorization. To enable email reminders, make sure to check the checkbox stating this. Once you’ve made the desired changes click the “Update User” button to save them.

Deleting an Existing User

Click the “Delete” link in the same row as that user’s name and click “OK” in the pop-up box. This will delete the user from the system and prevent them from logging in again.

Cars

See this entry under the Workstation Head Role to create and delete reservations

In addition to creating and deleting car reservations, administrator users can manage cars by clicking the “Manage Cars” link next to the title of the “Car Reservations” page.

Creating a New Car

To create a new car, click the “New Car” button on the Manage Cars page, then enter the car name and click “Create Car.”

Editing a Car

To change the name of an existing car, click the “Edit car” link on the Manage Cars page for the car you want to edit. Then, type the new car name in the name field and click “Update Car.”

Deleting a Car

To remove a car from the system, click the “delete car” link on the Manage Cars page for the car you want to delete. The car will then be deleted.

Reports

The reports page allows to admin users to download reports on appointments. Users can select the house, resident, doctor and appointment type to see appointments for. They can also select the date range to see appointments between. Finally, users can select either the CSV or PDF radio button to generate either a CSV or PDF report. Click the “Generate Report” button and boom! you’ve got a report!

In addition to the main reports page, the pages listing appointments, houses, doctors, and users contain links to download all of these lists as CSV files.

Admin Page

The admin page contains similar functionality to the Users page, in that it allows Administator users to create, edit and delete users. It also allows admins to mark other users as administrators by clicking the box under admin until it is green with a “Y” inside, or to turn on email notifications for users, again by clicking the box so it turns green and contains a “Y.” This page also allows adminstrators to designate users as the medical coordinator. The medical coordinators receieve an additional email digests informing them of all the appointments happening each day, as well as a Friday reminder email about all the appointments in the upcoming week.