

# Call Calendar User Guide for Call Managers

## Getting started:

1. Click on the link provided in the invitation e-mail provided by [orcallstaff.com](http://orcallstaff.com)
  - a. Fill out the account and personal information and select save.
  - b. If your account has already been activated, log onto <https://app.orcallstaff.com>

## How to add staff:

1. Add staff by selecting + **Add Staff** from menu on left upper corner of screen

a. **Add staff individually:**

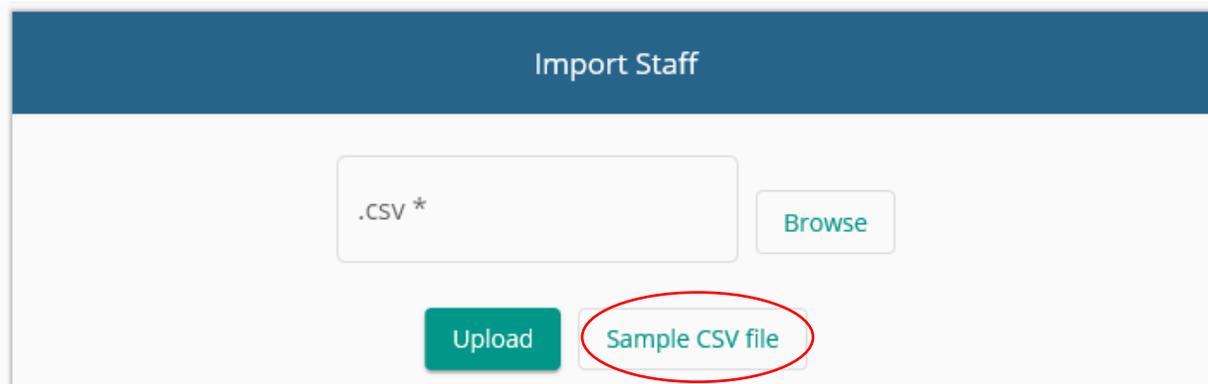
- i. Fill out mandatory Account Detail fields including username, primary e-mail, first and last name. Secondary e-mail address and phone numbers are optional and may be filled out by the staff member when they log into their account.

The screenshot shows a mobile application interface for adding staff. It features a teal header with a hamburger menu icon and the text 'Call Calendar'. Below the header is a dark blue sidebar menu with options: '+ Add Staff', 'List Staff', 'Call Group', 'Call Template', 'Call Calendar' (with a dropdown arrow), 'Create Call Calendar', 'Manage Call Calendar', 'Holidays', 'Email Template', and 'Logout'. The main content area displays a form with two sections: 'Account Details' and 'Personal Details'. The 'Account Details' section has input fields for 'UserName \*' and 'Primary Email \*', and a 'Lead\*' section with radio buttons for 'Yes' and 'No'. The 'Personal Details' section has input fields for 'First Name', 'Last Name', 'Primary Ph #', 'Secondary Ph #', 'Secondary Email', and 'Pager'. A 'Save & Send Invitation' button is highlighted with a red circle. At the bottom of the form is an 'Import Staff' button.

- ii. When finished adding staff details click on **Save & Send Invitation** to add the call team member. An e-mail will be sent to the new staff member with a link to activate their call calendar account.

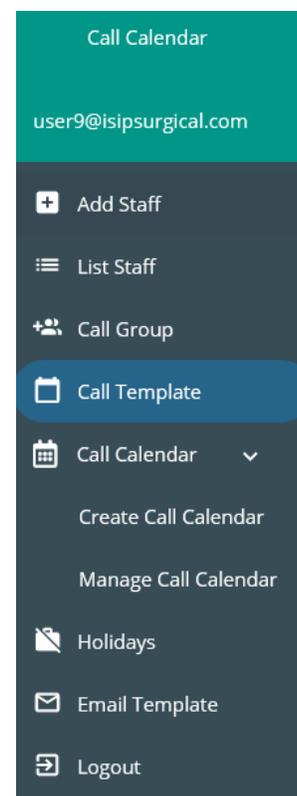
# Call Calendar User Guide for Call Managers

- b. **Import staff groups** or add multiple staff by importing CSV or Excel spreadsheet (the application that appears depends on what you have loaded on your computer):
  - i. A sample CSV sheet can be accessed and modified by clicking on Sample CSV file. The CSV file can be saved on computer and then imported.



## How to create call groups

1. Go to menu and select “**Call Group**” in order to group your staff members into various call groups (multiple call groups may be assigned to a single calendar)
  - a. Add a descriptive name to the **Group Name** field
  - b. Add staff members by clicking on **Staff** and **Add Staff**
  - c. Select the members of the team that are assigned to the desired group.
  - d. Select the **Save** button to save preferences
  - e. Under **List of Call Groups**
    - i. Call groups are listed by name with the number of staff members assigned to each group
    - ii. Each group can be edited or deleted by pressing the edit or delete buttons



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### Add Call Group

Group Name \*

Staff

Elizabeth Nideffer  Alec One  jim Nideffer

Add Staff...

### List of Call Groups

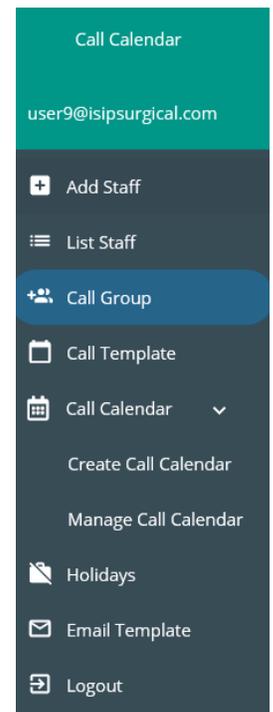
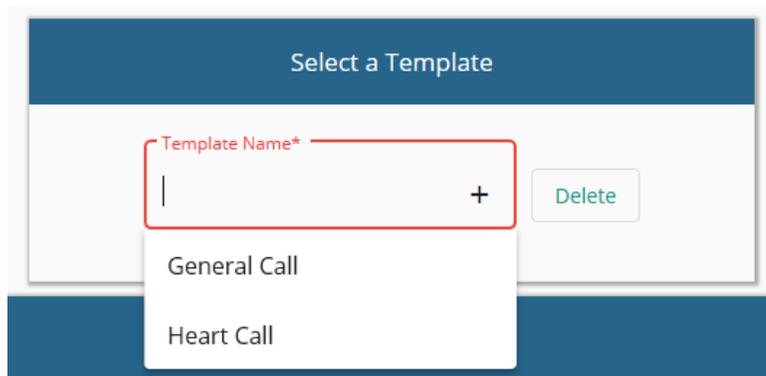
Group Name	Number of Staff	Action
General A	2	<input type="button" value="edit"/> <input type="button" value="delete"/>
General B	3	<input type="button" value="edit"/> <input type="button" value="delete"/>

Items per page: 10    1 - 2 of 2    << < > >>

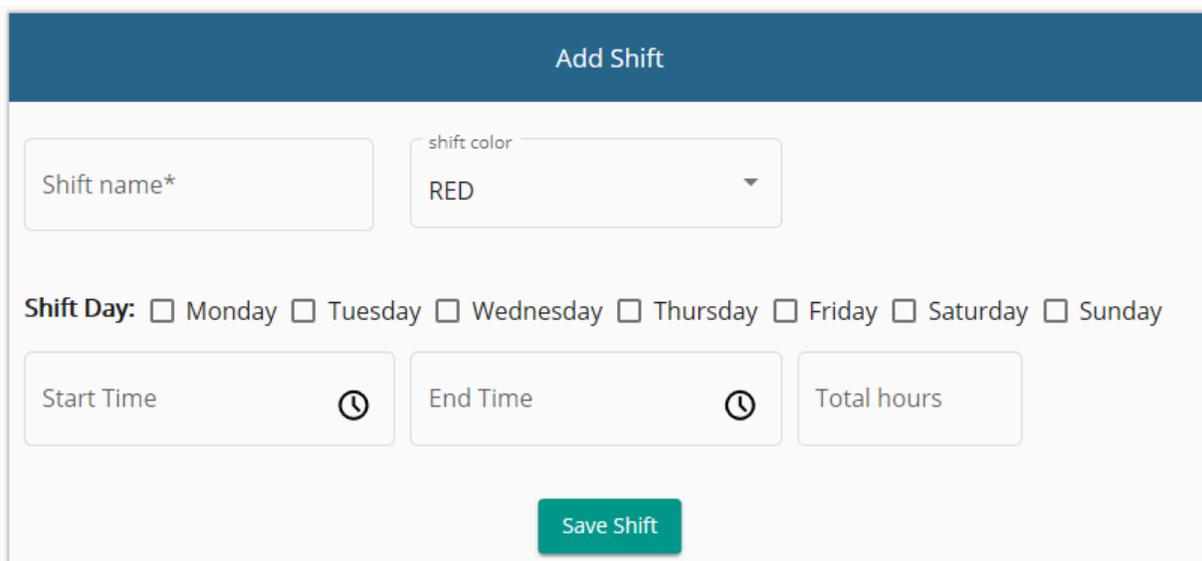
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## How to create a call template:

1. Click on **Call Template** from menu in upper left hand corner
2. Under **Select a Template** either select an existing template or type the name of a new call template and click the **+** sign to add. Confirm that you would like to add the new template by clicking **Ok**



3. Under **Add Shift**, select the following:
  - i. The name of the shift to include the description of the shift and time that it covers (example: RN 1<sup>st</sup> call 7p-11p).
  - ii. A color to distinguish shift on call calendar
  - iii. The days of the week that the shift should occur
  - iv. The start and end time of the call shift (note that the start and end times do not show up on calendar but will be reflected on notification e-mails and generated reports).
  - v. **Save** the shift information
4. Repeat this process for every call shift that you would like to post.



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## How to create a Call Calendar

1. Go to menu and **select create call calendar**
  - a. Name the call calendar with a descriptive title (example: July general call)
  - b. Specify the start and end dates of call period
  - c. Add a call group and specify the date and time that the call calendar will become active or available for that group to sign up.
  - d. Multiple call groups can be added to the same calendar with different sign up times.
  - e. Press **save** to activate call calendar

Call Calendar Name \*  
July call calendar

Start Date \* 7/1/2019 End Date \* 7/31/2019

CallCalendar Template \*  
General Call Change

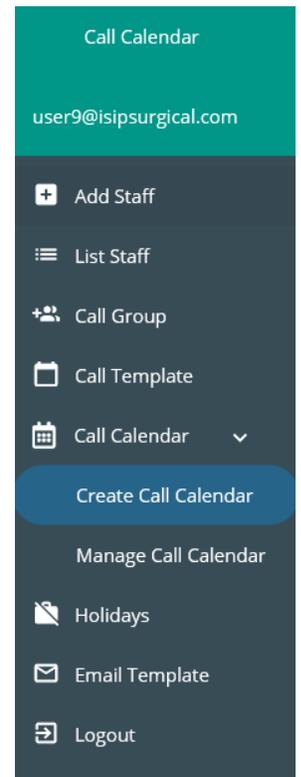
Call Groups  
General A

Activate On \* 6/23/2019 Start Time 12:00 am

Call Groups  
General B

Activate On \* 6/26/2019 Start Time 12:00 am

Clear Save Add More Remove



## How to manage the call calendar

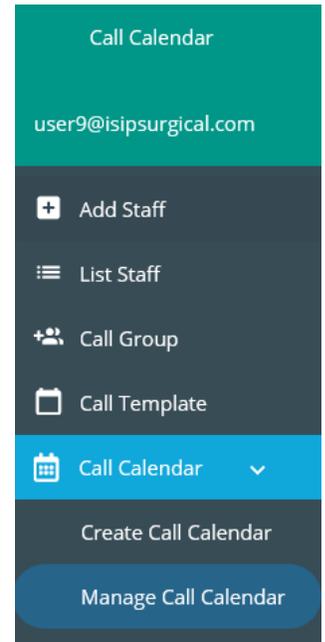
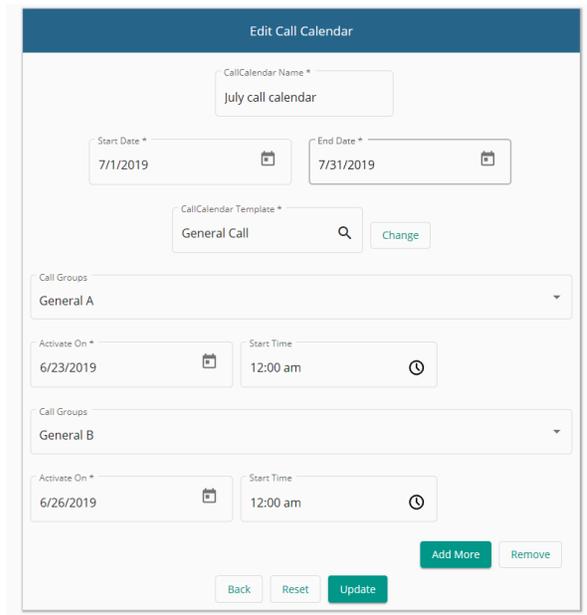
1. Return to menu and select **Call Calendar** and **Manage Call Calendar**

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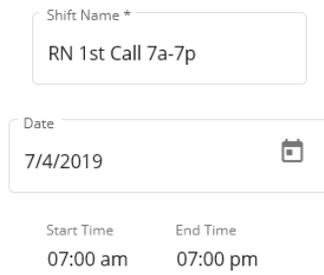
- a. Select the **edit** button in order to edit the details of the entire call calendar



- b. Select **“View Calendar”** in order to edit individual shifts or assign/remove staff (for example, to edit holiday call staffing).
- c. Click on **pencil icon** next to a staff member or an available shift in order to edit the time and date of the call shift.



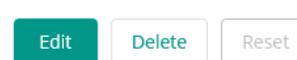
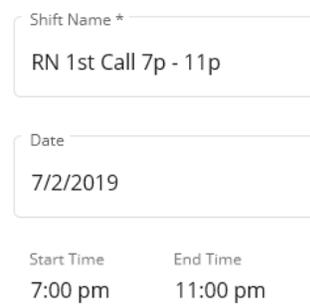
## Edit Shift



Change only for this date  Change all upcoming dates



## Edit Shift



- d. Make desired changes and confirm and save changes by selecting **Yes** to confirm shift.

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## How to add shifts

1. Click on **plus icon** under the calendar date to add additional shifts
  - a. Fill in the shift start and end times and then Click the **Add button**.



### Add Shift



Date  
7/4/2019

Start Time \* End Time \*

- b. Click on the **Available link** to assign shift to a staff member



- c. Click **Yes** to confirm the assigned shift

### Assign Shift

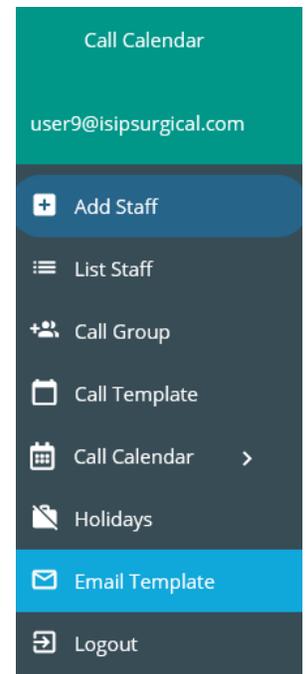
Staff Name  
Elizabeth Nideffer

### Confirm Shift ?

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## How to edit e-mail template

1. E-mail notifications to the staff are sent out automatically after the staff members are added to the call staff list or after an individual call staff member takes a shift.
  - a. When staff members are first added to the call calendar they will receive an invitation with a link prompting them to activate their call calendar account.
  - b. **To edit the content of account activation, reminder and shift taken e-mails** return to the main menu and select the **Email template link**.
    - i. Select the type of e-mail template that you would like to edit from the list at the top of the screen.
    - ii. **Do not edit the variables listed at the top of the screen (i.e. {staff-name}, {call-manager-name}, {verification-url} in the e-mail below. These variables will be populated automatically and deleting the variables will result in errors.**
    - iii. The main body of the e-mail notification may be edited.
    - iv. Click Save after you have finished editing the notification e-mail.

A screenshot of the 'Edit Email Template' screen in the application. At the top, there is a dropdown menu with three options: 'Account Activation Email', 'Reminder Email' (which is selected and highlighted in blue), and 'Shift Taken Email'. Below the dropdown is a section titled 'Available variables' containing four buttons: '{staff-name}', '{call-calendar-name}', '{shift-date}', and '{shift-name}'. Underneath is a 'subject' text field containing the text 'Reminder: {staff-name} {call-calendar-name} {shift-name} {shift-date}'. Below that is a 'body' text area containing the text: 'This is an automatic email. These are the details of the call that you have signed up. Name: {staff-name}, Calendar-name: {call-calendar-name}, Date: {shift-date}, Shift Name: {shift-name}'. At the bottom of the form are two buttons: 'Reset' and 'Save'.

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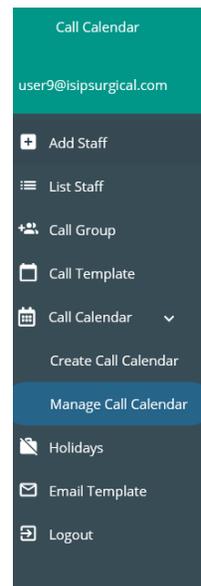
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## How to generate call reports and view call activity logs

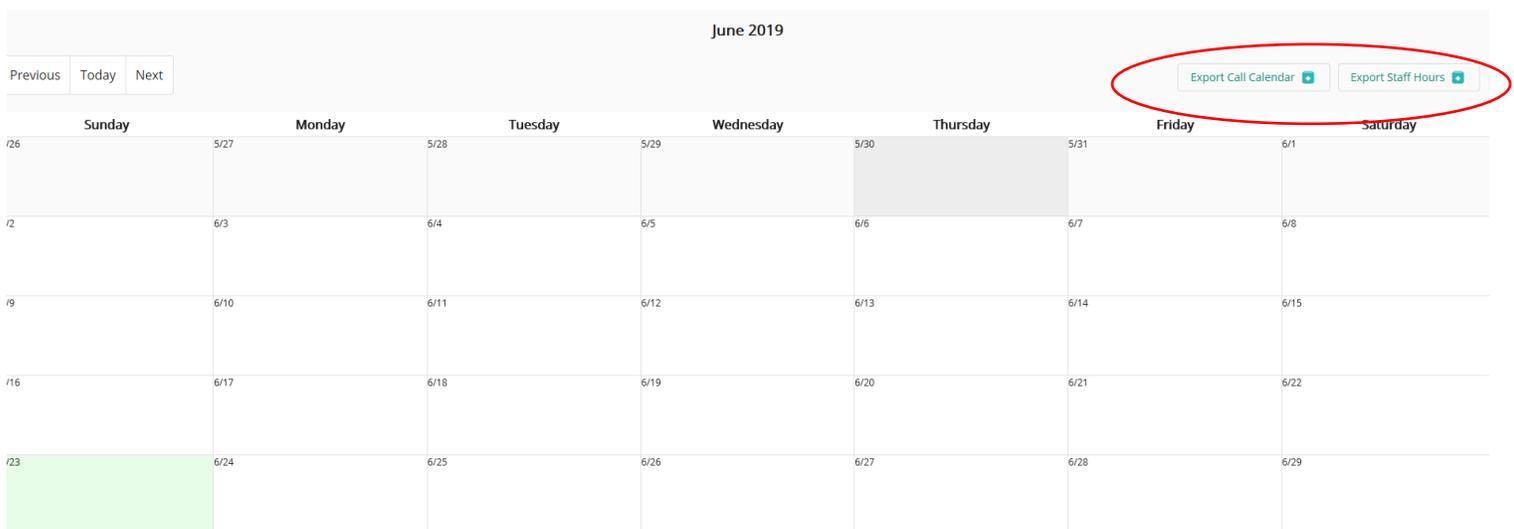
### 1. Running call reports

- Return to the main menu and select **Manage Call Calendar**
- Select a call calendar and click View Calendar

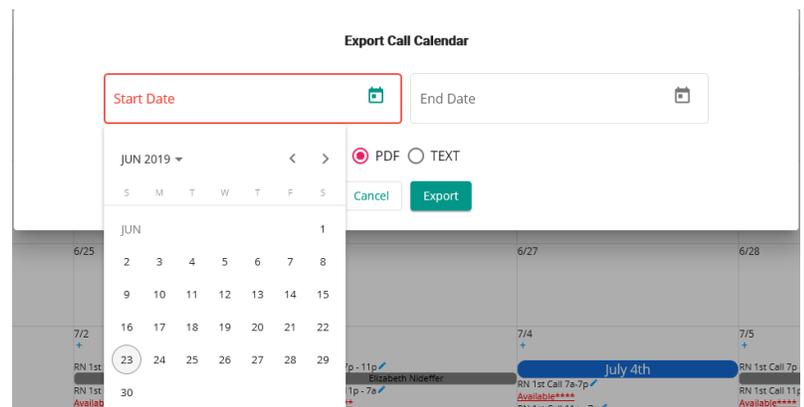
Created On	Name	Start Date: End Date	Action
Jun 22, 2019	July call calendar	Jul 1, 2019: Jul 31, 2019	<b>View Calendar</b>
Jun 21, 2019	June General Call	Jun 22, 2019: Jul 31, 2019	<b>View Calendar</b>



- Export call calendar or staff hours by selecting the appropriate button on the right upper hand side of the screen



- Select a start and end date and whether you would like to export the report to a PDF or text document (text documents open in Microsoft Notepad)



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## July call calendar

A Report Generated From 07/01/2019 to 07/31/2019

07/01/2019 1st Phone: # Na	RN 1st Call 7p - 11p 2nd Phone: # Na	Available**** Pager: # Na
07/01/2019 1st Phone: # Na	RN 1st Call 11p - 7a 2nd Phone: # Na	Available**** Pager: # Na
07/02/2019 1st Phone: 858-405-9554	RN 1st Call 7p - 11p 2nd Phone: # Na	Elizabeth Nideffer Pager: # Na

### 2. Running Activity Logs

- i. Go back to main menu and select **Manage Call Calendar**
- ii. Select the **Logs** button to view activity log on a call calendar

Created On	Name	Start Date: End Date	Action			
Jun 22, 2019	July call calendar	Jul 1, 2019: Jul 31, 2019		View Calendar	Logs	
Jun 21, 2019	June General Call	Jun 22, 2019: Jul 31, 2019		View Calendar	Logs	

Date	Event	Staff
Jun 23, 2019, 12:45:03 AM	"Alec One" assigned to the "RN 1st Call 7p - 11p" shift on 07/05/2019	Alec One
Jun 23, 2019, 12:44:43 AM	"July call calendar" has been edited	James Nideffer
Jun 23, 2019, 12:43:24 AM	"Jim Nideffer" gave up "RN 1st Call 7p - 11p" shift on 07/05/2019	Jim Nideffer
Jun 23, 2019, 12:43:06 AM	"Jim Nideffer" assigned to the "RN 1st Call 7p - 11p" shift on 07/05/2019	Jim Nideffer
Jun 22, 2019, 8:24:40 AM	"Elizabeth Nideffer" assigned to the "RN 1st Call 7p - 11p" shift on 07/02/2019	Elizabeth Nideffer
Jun 22, 2019, 6:57:40 AM	"Elizabeth Nideffer" assigned to the "RN 1st Call 7p - 11p" shift on 07/03/2019	Elizabeth Nideffer
Jun 22, 2019, 6:54:58 AM	"Holiday shift" shift on 07/04/2019 removed from the calendar	Elizabeth Nideffer
Jun 22, 2019, 6:54:27 AM	"Holiday shift" new shift added on 07/04/2019	Elizabeth Nideffer
Jun 22, 2019, 6:50:49 AM	"RN 1st Call 7a-7p" shift on 07/04/2019 has been modified	Elizabeth Nideffer
Jun 22, 2019, 6:45:06 AM	"July call calendar" Call Calendar created	Elizabeth Nideffer

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