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Version 4.0

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Introduction to Smart Web

Overview

Smart Web combines the information entered in the Directories, On-Call Assignments, On-Call Calendars, and Paging Smart Center forms into one web-based product. Smart Web enables you to access information in the directory, confirm on-call assignments, update an on-call schedule, and send a message through pager or email to an individual or a message group. You can also view and update the information in your personal profile.

IMPORTANT: For an individual or group to be available in Smart Web, their information must be allowed to be published in Smart Web. For more information on this topic, please refer to “Publishing Information to Smart Web” on page 4.

Technical Support

Contact Amcom’s Technical Support when you need assistance.

1-888-797-7487

Our technical support representatives will ask for the following information:

- The version of Smart Web that you’re using.
  Version information is displayed at the bottom of the left-hand Smart Web pane.
- The screen about which you have a question.
- The error that is occurring.
Accessing Smart Web

Overview

Smart Web can be accessed through a web browser, or by using the Amcom Application Launcher.

Using the Internet Browser

Smart Web can be accessed through a web browser using your organization’s Smart Web URL.

NOTE: Some of the features on Smart Web use cookies. Make sure that cookies are enabled on your browser to ensure full functionality.
1. Open a browser window.

2. Enter your organization’s Smart Web URL.

3. Press the Go button in the browser or press <Enter>.

   If you have not previously signed on, the Single Sign-On screen displays. Enter your user name and password in the fields provided, then click the Login button.

   If you have already opened a session using Single Sign-On, this screen does not display.

4. The Smart Web screen displays. The navigation menu displays on the left side of the screen, and the associated forms display in the main section of the screen.

Using the Amcom Application Launcher

You can use the Amcom Application Launcher to access Smart Web.

1. Open a browser window.

2. Enter your organization’s Amcom Application Launcher URL. The Launcher displays.

3. Click on the Launch button in the Smart Web section.

   If you have not previously signed on, the Single Sign-On screen displays. Enter your user name and password in the fields provided, the click the Login button.

   If you have already opened a session using Single Sign-On, this screen does not display.

4. The Smart Web screen displays. The navigation menu displays on the left side of the screen, and the associated forms display in the main section of the screen.
Overview

Before you begin working in Smart Web, you should be familiar with how information from Smart Center becomes available in Smart Web, and how to perform searches in Smart Web.

- Publishing Information to Smart Web
- Search Techniques

Publishing Information to Smart Web

Information about individuals and groups are made available in Smart Web through options in the Listing and Directory forms in Smart Center. If these options are not selected, the information is not available in Smart Web.

Listing Form Options

Choosing the Smart Web publish options in the Listing form in Smart Center ensures that the information for the group or individual is available in Smart Web.

1. Access Smart Center.
2. Access the Listing form.
3. In the Listing form, perform a search for the individual or group whose information you want to publish in Smart Web.
4. Select the Module Access tab.
5. Click in the **Module Name** field, then press <F3> to display a list of modules.

6. Select the SMART WEB option, then click the **OK** button. The **Module Name** field is populated with the selected option.

7. Select the **Enabled** option.
8. Press <F8> or click the **Save Changes** button to save the changes.

**Directory Form Options**

Choosing the Smart Web publish options in the **Directory** form in Smart Center ensures that the information for the group or individual is available in Smart Web.

1. Access Smart Center.
2. Access the **Directory** form.
3. In the **Directory** form, perform a search for the individual or group whose information you want to publish in Smart Web. Remember that an individual or group can have more than one directory record.
4. Select the record that has the information you want to publish to Smart Web.
5. Select the **Module Access** tab.
6. Click in the **Module Name** field, then press <F3> to display a list of modules.

7. Select the SMART WEB option, then click the **OK** button. The **Module Name** field is populated with the selected option.

8. Select the **Published** option.

9. Press <F8> or click the **Save Changes** button to save the changes.

---

**Search Techniques**

Within the Smart Web search screens, you can use the percent key (%) wildcard character within your searches.

**Searching for Items Beginning With a Specific Character**

You can search for items beginning with a specific letter or number by entering the character followed by the wildcard character (%) in the search field. Examples:

- If you are searching for names that begin with the letter T, enter either the letter “T” or “T%”. The search is not case sensitive.
- If you are searching for phone numbers that begin with the number 9, enter “9” or “9%”.

**Searching for Items Containing a Specific Character**

You can search for items that contain a specific letter or number by entering the character followed by the wildcard character (%) in the search field. The search is not case sensitive.

- If you are searching for names that contain the letter “m”, enter “%m%”.
- If you are searching for phone numbers that contain the number 5, enter “%5%”.
Performing a Directory Search

Overview and Steps

Information about an individual or group can be viewed by doing a directory search for that individual or group. The information available includes their current status, email address, any current exceptions, and phone numbers.

The screen used to perform a directory search displays by default when you access Smart Web. You can also access the screen by choosing the Directory Search option from the navigation menu. Within this screen, you can search for an individual or a group by name, phone number, or title.

1. The Directory Search screen displays when you access Smart Web. You can also choose Directory Search from the navigation menu to display the screen.

2. You can search for a person by name, department, phone number, or title, or a combination of this information. You cannot search by phone type alone, but it can be used in a search when combined with another field. Phone type examples are Office, Fax, or Cell.
3. Enter information into at least one of the following fields: **Last Name**, **First Name**, **Department**, **Phone #**, or **Title**. An entry made must exactly match the entry in the database. If you are not sure of the exact entry, enter the wildcard character (%) into the field followed by a partial entry, such as “%Joh%”. The entry is not case-sensitive. Any entry that contains the partial entry is included in the search results.

**NOTE:** If you have made entries that you don’t want to search on, click the **Reset** button to clear all the fields in the form.

4. Click the **Search** button to perform the search. The search results display in the search results screen.

5. Entries in the **Name** column may have a directory folder and plus sign next to them.
   - If the entry is the name of a person, then the person has more than one phone number. Click on the plus sign to display the additional numbers in the **Phone # [Type]** column.
   - If the entry is the name of a department, the department has individuals assigned to it. Click on the plus sign to display the department members.

6. From within the **Name**, **Pager**, **Email**, and **Phone # [Type]** columns, you can access more information about this individual or person, or you can contact them.

---

**Displaying Detailed Information for an Individual or Group**

You can display detailed information for a person or department by clicking on a name in the **Name** column. The Directory Detail View screen displays in a separate browser window. The information contained in this screen comes from the information entered in the Smart Center forms. No changes can be made in this screen. To close this screen, close the browser window.
You can, however, send an email to this person or individual from this screen.

1. Click the email icon next to the name shown in the **Send Email To** field. The Send Email screen displays.

2. Click the email icon next to the email address to which you want to send an email. Your default email application is accessed, and a new message screen displays. The email address for the person or department is automatically entered in the email recipient field.

3. Enter the message.

4. From within the email application, send the email. You must do this manually. Amcom does not send out the email automatically.

5. Click the **Done** button in the Send Email screen to close it.

**Paging an Individual or Group**

From the **Pager** column in the Directory Search screen, you can send either a page or a message to the person or department. You can send messages when a person or department is not able to be paged. The message is stored with the operator. An icon denotes whether paging or messaging is available.
When you send a page, the pager is selected from the list of pagers entered in the Pagers tab in the Listings form. The pager selected is the one that is assigned the highest order number. (1 has the highest priority). If order numbers have not been assigned, the first pager in the list is selected.

1. Click on the pager icon for the person or department. The Paging screen displays.

![Paging screen](image)

2. In the Callback Number field, enter the phone number that the page recipient should call to respond to the page. The number of characters you are allowed to enter in this field displays in the Remaining Characters field. The field is updated as you type in an entry.

3. In the Message field, enter the text of the message. If the Common Page Type field entry is NUMERIC you are only allowed to enter characters from this set: 0123456789#*. The number of characters you are allowed to enter in this field displays in the Remaining Characters field. The field is updated as you type in an entry.

4. Click the Clear button if you need to reset the fields in the screen.

5. If you do not want to send this page, click the Cancel button.

6. Click the Send button to send the page.

   If the page was successfully sent, a confirmation screen displays. Click the OK button to close the screen and the browser it was displayed in.

![Paging Confirmation](image)
If the page failed for any reason, you are given the option to resend the page or cancel it.

- To resend the page, select the **Mark Here To Resend** option then click the **Proceed** button.
- To cancel the page, click the **Cancel** button.

### Sending a Message to an Individual or Group

You are able to send a message if the individual or group does not have a pager or if the pager is inoperable. The message is stored with the operator.

1. ![Message Icon]
   - Click on the message icon for the person or department. A message screen displays in a separate browser window, asking if you want to send a message.

2. ![Microsoft Internet Explorer]
   - Click the **Cancel** button if you do not want to send a message.
   - Click the **OK** button to continue with the message process. The Paging screen displays.
4. In the **Callback Number** field, enter the phone number that the page recipient should call to respond to the page. The number of characters you are allowed to enter in this field displays in the **Remaining Characters** field. The field is updated as you type in an entry.

5. In the **Message** field, enter the text of the message. The number of characters you are allowed to enter in this field displays in the **Remaining Characters** field. The field is updated as you type in an entry.

6. If you want to re-enter the message, click the **Clear** button. The message field is cleared.

7. If you do not want to send the message, click the **Cancel** button.

8. Click the **Send** button to send the message to the operator. A confirmation screen displays.

9. Click the **OK** button to close the screen and the browser it was displayed in.
Sending an Email to an Individual or Group

If an email icon is displayed in the Email column, you can send an email to the person or department.

1. Click on the email icon for the person or department. Your default email application is accessed, and a new message screen displays. The email address for the person or department is automatically entered.
2. Enter the message.
3. From within the email application, send the email. You must do this manually. Amcom does not send out the email automatically.

Calling an Individual or Group

You can automatically call a person or department if a phone number is listed in the Phone # [Type] column.

1. Click on the phone number displayed in the Phone # [Type] column.
2. If you have not used the phone dialer before, the Call Assistant screen displays. This is a registration screen that displays the first time the phone dialer is used. If you have already registered your extension, skip to Step 5.
3. Enter your phone extension in the field.
4. Click the Submit button. A confirmation screen displays. The screen shows the phone number that will be dialed, and your extension number.
5. Click the **Dial** button to call the phone number shown. The system automatically makes the call from your extension.
Determining Who is On-Call

Overview and Steps

Using Smart Web, you can access information about on-call groups, and you can look up on-call assignment schedules for individuals or groups.

The information that is accessed is for the current month and all future months, as well as information for the previous seven days. The end date of an assignment must be within the previous seven days to be included. Information about completed scheduling assignments is not included. Historical scheduling information can be found by choosing the On-Call History Search menu option. Please refer to “Searching for Historical On-Call” on page 36 for more information.

1. Access Smart Web.
2. Choose the On-Call Search menu option from the navigation menu. The On-Call Search screen displays.
3. You can search for an on-call group or for a member of an on-call group.

**Searching for information about all on-call groups**

a. The wildcard character (%) is entered in the ID field by default.

b. Click the Search button to the right of the Group Name field to display information for all on-call groups.

**Searching for information about a specific on-call group**

a. Enter a specific on-call group number in the ID field, or an on-call group name in the Group Name field. If you don’t know the exact on-call group identification number or name, leave the ID field blank.

b. Click the Search button the right of the Group Name field. Any on-call groups that contain the entry are displayed. If the ID field was left blank, information for all groups displays.

**Searching for information for a group member**

a. Enter the name of a person in the Person Name field. The name must match exactly with a name in the database. If you are not sure of the name, enter the wildcard character (%) followed by a partial name.

b. In the Active Date field, enter a beginning search date. The format is DD-MMM-YYYY HH:MM AM.

c. In the Period field, enter a range of days.

d. Click the Search button to display the search results. Note that the entries in the Person Name, Active Date, and Period fields work together. If no results display, try a entering a different starting date or a long range of days and starting the search again.

**Searching for information about a specific date**

a. Enter a date in the Active Date field. The format is DD-MMM-YYYY HH:MM AM.

b. Click the Search button to display on-call schedule information for the people who are scheduled for the specified date.

**Searching for information for a time period**

a. Enter a number for a range of days in the Period field.

b. Click the Search button to display on-call schedule information for the people who are scheduled to be on-call for the same number of days. For example, if you enter the 5 in the Period field, anyone who is on call for the next 5 days is included in the search results.

4. If you did a search for an on-call group, the search results display in the On-Call Search screen. This screen does not display if you did a search for an individual. If you did a search for an individual, skip to Step 6.
5. A group with a yellow folder next to it has other on-call groups associated with it. Click on the plus sign next to the folder to display the associated groups.

6. A group name that displays as a link has an on-call schedule associated with it. Click the linked name to display the schedule. The On-Call Search screen displays in a new browser window. The on-call assignments for the current day display in green.

7. This screen also displays if you did a search for an individual.

8. The information in this screen is sorted by default by the start date listed in the Start column. You can change the sort column by clicking on any column name that displays as a linked name: On-Call Group.
**Msg ID, Name, Start, or End.** An arrow displays next to the name of the sort column.

9. You can limit the information in the window by filtering the list by month and year. From the list boxes in the **Filter Schedules By** field, select a month and year, then click the **Go** button. The updated list displays.

10. To display information about a person in a group, click on the person’s name. An information box displays. Move the cursor off the person’s name to close the box.

11. The on-call group information listed in the screen can be printed or saved as a Microsoft Word or Excel file. Note that these applications must be installed on the computer before the file can be saved in a Word or Excel format. From the **Send Output To** list box, choose one of the following options:

   - **Printer:** This option is the default. Select this option, then click the **Go** button. The standard **Print** dialog box displays, from which you can select the desired printer and print the on-call schedule.

   - **MS Word:** Select this option, then click the **Go** button. A message box displays, showing you the name of the Word file that will be downloaded. Click the **Save** button to save the file.

   - **MS Excel:** Select this option, then click the **Go** button. A message box displays, showing you the name of the Excel spreadsheet file that will be downloaded. Click the **Save** button to save the file.

12. From the **Page/Msg** column, you can send either a page or a message to the selected person. You can send messages when a person or department is not able to be paged. The message is stored with the operator.

   For information about paging an individual or on-call group, please refer to “Paging an Individual or Group” on page 10.

   For information about sending a message to an individual or on-call group, please refer to “Sending a Message to an Individual or Group” on page 12.
Viewing a Calendar of On-Call Assignments

Overview and Steps

Within Smart Web, you can generate a calendar showing the on-call assignments for the members of an on-call group. You can search for the group by ID number or by name. Information is shown for the current month and for future months.

For information on how to access on-call scheduling calendars for past months, please refer to “On-Call History Calendar” on page 41.

1. Access Smart Web.
2. Choose the On-Call Calendar menu option from the navigation menu.
   The On-Call Calendar Search screen displays.
3. Within the search screen you can search for an on-call group by identification number or by name.

**Searching by Identification Number**

a. The search screen is set up to search for all on-call groups by identification number by default. No entry is required in the search screen.

   To limit the search, enter the identification number for a group. If you are not sure of the number, enter the wildcard character (%) followed by a partial number.

b. Click the **Search** button to display information for the specific group, or for the list of groups that contain the partial entry.

**Searching by On-Call Group Name**

a. Enter the name of an on-call group in the **Name** field. The name must match exactly with a name in the database. If you are not sure of the name, enter the wildcard character (%) followed by a partial name.

b. Click the **Search** button to display information for the specific group, or for the list of groups whose names contain the partial entry.

4. When you click the search button, the On-Call Calendar Search screen redisplay, showing the search results.

5. An on-call group with a yellow folder next to it has other on-call groups associated with it. Click on the plus sign next to the folder to display the associated groups.
6. A group name that displays as a link has an on-call calendar associated with it. Click the linked name to display the calendar in a new browser window. The current month is displayed by default.

7. The group members who are on-call for each day are listed in the calendar with their on-call times shown. The on-call assignments for a member who has consecutive on-call shifts are shown in color. Different colors are used for separate runs of consecutive shifts.

8. Click on a member’s name to display detailed information about that member. The Detail Information screen displays in a separate browser window.

   Close the browser window to close the screen.
9. You can display a calendar for a different month by choosing a different month and year from the date list boxes. You can also click the blue directional arrows to scroll through the months. You can choose to display a past month, however, be aware that scheduling information is not included in the calendar. For information on displaying on-call calendars for past months, please refer to “On-Call History Calendar” on page 41.

10. To refresh the screen, click the Refresh button.

11. Click the Print button to print the calendar. The Print dialog box displays, from which you can choose the appropriate print options.

12. You can display on-call group information for the group members for one day by clicking the search icon for the selected day. The On-Call Search screen displays. On-call assignments for the current day display in green.
13. The information in this screen is sorted by default by the start date listed in the Start column. You can change the sort column by clicking on any column name that displays as a linked name: On-Call Group, Msg ID, Name, Start, or End. An arrow displays next to the name of the sort column.

14. You can limit the information in the window by filtering the list by month and year. From the list boxes in the Filter Schedules By field, select a month and year, then click the Go button. The updated list displays.

15. To display information about a person in a group, click on the person’s name. An information box displays. Move the cursor off the person’s name to close the box.

16. The on-call group information listed in the screen can be printed or saved as a Microsoft Word or Excel file. Note that these applications must be installed on the computer before the file can be saved in a Word or Excel format. From the Send Output To list box, choose one of the following options:

- **Printer**: This option is the default. Select this option, then click the Go button. The standard Print dialog box displays, from which you can select the desired printer and print the on-call schedule.

- **MS Word**: Select this option, then click the Go button. A message box displays, showing you the name of the Word file that will be downloaded. Click the Save button to save the file.

- **MS Excel**: Select this option, then click the Go button. A message box displays, showing you the name of the Excel spreadsheet file that will be downloaded. Click the Save button to save the file.

17. From the Page/Msg column, you can send either a page or a message to the selected person. You can send messages when a person or department is not able to be paged. The message is stored with the operator.

   For information on how to send a page, please refer to “Paging an Individual or Group” on page 10.

   For information on how to send a message, please refer to “Sending a Message to an Individual or Group” on page 12.

18. To close either the calendar or the search screen, close the browser window.
Scheduling an On-Call Assignment

Overview and Steps

Within Smart Web, you can assign an on-call schedule to an on-call group or an individual group member. You can also add or remove members from a group.

To be able to log in, you must be assigned as an Administrator to an on-call group in the Smart Center On-Call form. Only the groups to which you are assigned as an Administrator are included in the list of groups displayed.

Accessing the On-Call Assignment Screen

1. Access Smart Web.
2. Choose the On-Call Assignment menu option. The login screen displays if you have not already logged in.
3. Enter your messaging ID and password in the User Name and Password fields.
4. Click the OK button. The On-Call Assignment screen displays.
5. On-call groups display in the screen. A group with a yellow folder next to it has other groups associated with it. Click on the plus sign next to the folder to display the associated groups.

6. The various links in the screen enable you to assign schedules and update member information.
   
   - To view any current instructions for the on-call group, click the Instructions tab.
   
   - To assign a schedule for a group member, click on the name of an on-call group that displays as a link, or click the Block link. Please refer to “Scheduling an On-Call Group Member” on page 27 for more information.
   
   - To update schedule information for a member, click the Scheduler link. Please refer to “Updating a Member’s Schedule” on page 29 for more information.
   
   - To add members to or remove members from an on-call group, click the Members link. Please refer to “Adding or Removing Members from a Group” on page 32 for more information.
   
   - To re-assign an on-call assignment to a different person, click the Find On-Call Person button. Please refer to “Re-Assigning an On-Call Shift” on page 33 for more information.

7. You can change your Administrator password in this screen. Click the Change Password button. The Personal Profile screen displays.
a. Enter your current password in the Old Password field.
b. Enter the new password in the New Password field.
c. Re-enter the new password in the Verify Password field.
d. Click the Submit button to change the password.

**Scheduling an On-Call Group Member**

Once you have accessed the On-Call Assignment screen, you can assign an on-call shift to a member using the On-Call Block Assignment screen. The screen is divided into three tabs:

- **View/Edit Schedule**: This tab displays any existing schedule assignments for the current day. You can also make changes to the assignments in this tab.

- **Select Date(s) From Calendar**: This tab displays the days that have a group member scheduled to be on call. The days display in green. You can also use this calendar to select the days for which you want to schedule a member.

- **Add New Schedule**: Within this tab you can specify shift information.

The process outlined below explains how to assign an on-call shift to a member of an on-call group.

1. From the On-Call Assignment screen, click on either the name of an on-call group that displays as a link or click on the Block link. The On-Call Block Assignment screen displays. Information for the current day displays in the screen.
2. In the Select Date(s) From Calendar tab, the current month is displayed by default. Use the blue arrow buttons to scroll and display a different month.

3. In the calendar for the selected month, click on the days to which you want to assign a member to an on-call shift. The square for that date turns orange when it is selected. A date square that is green already has someone scheduled to be on-call that day. You can re-select that date to assign an additional member to a shift on that day.

4. In the Add New Schedules tab, specify the member of the on-call group to whom you want to assign an on-call shift. Enter a full or partial ID number or name in the ID or Name field, then click the Find button. If there is only one match, the fields are automatically populated with the name and ID. If more than one option is available, the On-Call List screen displays, from which you can select a member.

    If you click on the Find button without making any entries in the ID or Name fields, the On-Call List screen displays a list of the members of the on-call group.

5. From the Shift list box, select a shift. The list of shifts comes from the shifts entered in the On-Call form in Smart Center for the on-call group. When you select a shift, the fields in the Enter New Shift Information section are automatically populated. You can make changes to any of the fields. If no shifts have been created for the on-call group in Smart Center, you can manually enter the shift information.

    - Click the List button to display a list of time zones. The selected time zone displays in the Time Zone field.

    - The number of days spanned by the selected shift displays in the Spans field. The span indicates whether the shift spans midnight.
For example, for a shift that runs from 4:30 PM to 12:30 AM, the entry in the Spans field is 1.

- The priority of the shift is displayed in the Priority field.
- You can enter any comments or notes for the shift in the Remark field.

6. Click the Save button to save the schedule assignment. The date squares for the selected days turn green.

7. To view the schedule for a particular day, click on the date square. The schedule for that day displays in the View/Edit Schedules tab. If the date is already selected, click the Refresh button at the top of the screen to update it and display the shifts.

8. In the View/Edit Schedules tab, you can update the on-call assignments listed for that day. Click the Edit button to display the On-Call Assignment Scheduler screen.

9. For information on updating a member’s schedule, please refer to “Updating a Member’s Schedule” on page 29.

10. Click the Exit button to return to the On-Call Assignment screen.

**Updating a Member’s Schedule**

An on-call group member’s on-call schedule can be updated.

1. From the On-Call Assignment screen, click on the Scheduler link for the group of which the person is a member. The On-Call Assignment Scheduler screen displays. The on-call assignments for the on-call group members are displayed. The list is sorted by date and time, beginning with the earliest date and time for the current month.

   This screen can also be accessed from the View/Edit Schedules tab in the On-Call Block Assignment screen.
2. You can use the set of location buttons at the bottom of the screen to find the shift assignment you want to change:
   - Click the **First** button to display the first set of ten assignments. The list is sorted by the date and time, with the earliest date and time at the beginning of the list.
   - Click the **Next Set** button to display the next 10 assignments.
   - Click the **Previous Set** button to select the previous set of 10 assignments.
   - Click the **Last** button to display the remaining list of assignments.

3. Once you have located the shift assignment, you can add, update, or delete the assignment.

**Adding an On-Call Assignment**

   a. Click the **Add New** button. A new row is inserted.

   b. Specify the member to whom you want to assign a schedule. Enter an ID or a name into the **Msg ID** or **Name** field. If you are not sure of the exact name or ID number, click the **List** button to display a list of the group members.

   c. The date and time of the next possible shift display by default in the **Start** and **End** fields. If no shifts have been set up for the on-call group in the **On-Call** form in Smart Center, the current date and time is used as the next possible shift. You can manually change the time and date of the shift.

   d. To change the time zone, click the **Time Zone List** button to display a list of time zones.

   e. Enter the priority of this assignment in the **Priority** field.

   f. Any notes about this shift can be entered in the **Remark** field.

   g. Click the **Save** button to add the assignment.
h. Click the **Refresh** button to update the assignment schedules. The new assignment is included.

**Updating an On-Call Assignment**

a. Click on the button to the left of the **Msg ID** field in the row of the shift assignment you want to change.

b. To change the member, place the cursor in the **Msg ID** or **Name** field and click the **List** button. A list of the on-call group members displays. Select a member from the list.

c. You can update the start and end dates and times for the shift by manually entering new dates and times into the **Start** and **End** fields.

d. To change the time zone, click the **Time Zone List** button to display a list of time zones.

e. Enter the priority of this assignment in the **Priority** field.

f. Any notes about this shift can be entered in the **Remark** field.

g. Click the **Save** button to add the assignment.

h. Click the **Refresh** button to update the assignment schedules.

**Deleting an On-Call Assignment**

a. Click on the button to the left of the **Msg ID** field in the row of the shift assignment you want to delete.

b. Click the **Delete** button.

c. Click the **Save** button to add the assignment.

**Assigning an Additional Person to an Existing Shift**

a. Select a member who is currently assigned to the shift to which you want to assign an additional person.

b. Click the **Assign Same Shift** button. A new row is inserted with the same date and time as the selected member.

c. To assign a member to the shift, place the cursor in the **Msg ID** or **Name** field and click the **List** button. A list of the on-call group members displays. Select a member from the list.

d. Click the **Save** button to save the change.

e. Click the **Refresh** button to update the assignment schedules. Both members are assigned to the shift.

**Assigning a Member to the Next Shift**

a. Select the member who you want to assign to the next shift. If there is only one shift created for the on-call group, the member is assigned to the same shift on the next day.

b. Click the **Assign Next Shift** button. A new row is inserted with the date and time of the next shift.

c. Click the **Save** button to save the addition.

d. Click the **Refresh** button to update the assignment schedules.
Assigning a Member to the Same Shift on the Next Day

a. Select the member who you want to assign to the same shift on the next day.

b. Click the Assign Next Day button. A new row is inserted with the same shift time and an updated date range. For example, if the original shift was for June 5, the added shift will be for June 6. The times for both shifts are the same.

c. Click the Save button to save the addition.

d. Click the Refresh button to update the assignment schedules.

4. Click the Print button to print a list of the shift assignments. The On-Call Search screen displays in a new browser window. From the Send Output To list box, select the output option: Printer, MS Word, or MS Excel. Click the Go button to print the list of shift assignments or save the list to a file. Close the browser window to return to the On-Call Assignment Scheduler screen.

5. Click the Exit button to return to the On-Call Assignment screen.

Adding or Removing Members from a Group

You can add members to or remove members from an on-call group.

1. From the On-Call Assignment screen, click on the Members link for the group that contains the members you want to update. The On-Call Group – Members Administration screen displays.

2. The potential members you can add to an on-call group are listed in the search results section in the middle of the screen. You can use the search feature to limit the list of potential members. The current
members in the group are listed in the Current Members section at the bottom of the screen.

**Adding a Member to an On-Call Group**  

a. The members are listed in the results section in groups of 25, sorted alphabetically by name. You can find the name of the person you want to add to the group by scrolling through the list of names. Click the **Next 25** button to display the next list of 25 names. The **Prev 25** button is available when the second 25 names have been displayed. When the final set of ten is displayed, the **Next 25** button toggles to the **Prev 25** button.

b. As an alternative, you can use the search feature to find a name. If you know the person’s ID number, enter the number in the **ID** field then click the **Search** button. The search results display in the results section.

c. You can also enter a partial or full name in the **Name** or **Department** fields and then click the **Search** button. Any member names that match the entry are displayed in the search results section.

d. Click the **Add Member** button next to the name of the person you want to add to the on-call group. The name displays in the Current Members section of the screen.

**Deleting a Member from an On-Call Group**  

a. The current members of the on-call group are listed in the Current Members section at the bottom of the screen. Scroll through the list to find the member you want to remove from the group. The members are sorted numerically by messaging ID number.

b. Click the **Delete Member** button to delete the selected member.

**Re-Assigning an On-Call Shift**

Once a member has been scheduled to an on-call shift, you can re-assign the shift to a different person.

1. Access the On-Call Assignment screen.
2. Click the **Find On-Call Person** button in the On-Call Assignment screen. The search screen displays.

3. Within the search screen you can search for a group member by identification number or by name.

**Searching by Identification Number**

a. Enter the identification number for a group member in the **Messaging ID** field. If you are not sure of the number, enter a partial number preceded and followed by the wildcard character
For example, enter “%10%” to find all messaging IDs that contain the number string “10”.

b. Click the **Search** button to display information for the specific group member, or for the list of member identification numbers that contain the partial entry.

**Searching by Member Name**

a. Enter the name of a group member in the **Name** field. The name must match exactly with a name in the database. If you are not sure of the name, enter a partial name preceded and followed by the wildcard character (%). For example, enter “%va%” to find all names that contain the string “va”.

b. Click the **Search** button to display information for the specific group member, or for the list of group members whose names contain the partial entry.

4. When you click the search button, the On-Call Assignment screen displays, showing the search results.

5. Click the selection box next to the shift you want to reassign. You can select more than one shift. Click the **Mark All** button to select all shifts. Click the **Unmark All** button to deselect any selected shifts.

6. In the **ID** and **Name** fields, enter the ID number or name of the person to whom you want to re-assign the selected shifts. If you are not sure of the exact name or ID number, click the **Find** button to access the search feature.

7. When the member has been selected, click the **Update** button. The shift is removed from the list for this person, and re-assigned to the selected member.

8. Click the **Exit** button to return to the main On-Call Assignment screen.
Searching for Historical On-Call Scheduling Information

Overview and Steps

You can search for historical scheduling information for the on-call groups and for individuals using the On-Call History Search menu option. On-call schedules for past months is available, as well as for the current and future months.

1. Access Smart Web.
2. Choose the On-Call History Search menu option. The login screen displays if you have not already logged in.

3. Enter your messaging ID and password in the User Name and Password fields.
4. Click the OK button. The On-Call Historical Search screen displays.
5. You can search for an on-call group or for a group member.

**Searching for information about all on-call groups**

a. The wildcard character (%) is entered in the **ID** field by default.

b. Click the **Search** button to display information for all on-call groups.

**Searching for information about a specific on-call group**

a. Enter a specific on-call group number in the **ID** field, or an on-call group name in the **Group Name** field. Click the **Search** button to display information about the selected on-call group.

If you don’t know the exact on-call group identification number or name, you can use the wildcard character to limit your search. Enter the partial name or ID number in the **ID** or **Group Name** field preceded and followed by the wildcard character (%). For example, enter “%10%” to find all messaging IDs that contain the number string “10”.

b. Click the **Search** button. Any on-call groups that contain the entry are displayed.

**Searching for information for a group member**

a. Enter the name of a person in the **Person Name** field. The name must match exactly with a name in the database. If you are not sure of the name, enter the partial name in the **Group Name** field preceded and followed by the wildcard character (%). For example, enter “%john%” to find all messaging IDs that contain the number string “john”.

b. In the **Active Date** field, enter a beginning search date. The format is DD-MMM-YYYY HH:MM AM.
c. In the **Period** field, enter a range of days.

d. Click the **Search** button to display the search results. Note that the entries in the **Person Name**, **Active Date**, and **Period** fields work together. If no results display, try entering a different starting date or a long range of days and starting the search again.

**Searching for information about a specific date**

a. Enter a date in the **Active Date** field. The format is DD-MMM-YYYY HH:MM AM.

b. Click the **Search** button to display on-call schedule information for the people who are scheduled for the specified date.

**Searching for information for a time period**

a. Enter a number for a range of days in the **Period** field.

b. Click the **Search** button to display on-call schedule information for the people who are scheduled to be on-call for the same number of days. For example, if you enter the 5 in the **Period** field, anyone who is on call for 5 days is included in the search results.

6. When you click the **Search** button, the search results are displayed in the On-Call Historical Search screen. This screen does not display if you did a search for an individual. If you did a search for an individual, skip to Step 8.

7. The on-call groups that match the search criteria display in the screen. A group with a yellow folder next to it has other groups associated with it. Click on the plus sign next to the folder to display the associated groups.

8. A group name that displays as a link has an on-call schedule associated with it. Click the linked name to display the schedule. The On-Call Historical Search screen displays in a new browser window.
9. This screen also displays if you searched for an individual.

10. The information is sorted by the start date listed in the Start column by default. You can change the sort column by clicking on any column name that displays as a linked name: On-Call Group, Msg ID, Name, Start, or End.

11. You can limit the information in the window by filtering the list by month and year. From the list boxes in the Filter Schedules By field, select a month and year, then click the Go button. The updated list displays.

12. To display information about a person in a group, click on the person’s name. An information box displays. Move the cursor off the person’s name to close the box.

13. The on-call group information listed in the screen can be printed or saved as a Microsoft Word or Excel file. You must have these applications installed to be able to save to these formats. From the Send Output To list box, choose one of the following options:

   - **Printer**: This option is the default. Select this option, then click the Go button. The Print dialog box displays, from which you can select the desire printer and print the on-call schedule.
- **MS Word**: Select this option, then click the **Go** button. A message box displays, showing you the name of the Word file that will be downloaded. Click the **Save** button to save the file.

- **MS Excel**: Select this option, then click the **Go** button. A message box displays, showing you the name of the Excel spreadsheet file that will be downloaded. Click the **Save** button to save the file.

14. Click the **Exit** button to close the search results browser window.
On-Call History Calendar

Overview and Steps

Using the On-Call History Calendar menu option, you can generate a calendar showing the on-call assignments for the members of on-call group for current, future, and past months. You can search for the group by identification number or by name.

1. Access Smart Web.
2. Choose the On-Call History Calendar navigation menu option. The login screen displays if you have not already logged in.
3. Enter your messaging ID and password in the User Name and Password fields.
4. Click the OK button. The Historical Calendar Search screen displays.
5. Within the search screen you can search for an on-call group by identification number or by name.

**Search by Identification Number**

a. The search screen is set up to search for all on-call groups by identification number. No entry is required in the search screen.

b. To limit the search, enter the identification number for a group. If you are not sure of the number, enter the wildcard character (%) followed by a partial number.

c. Click the **Search** button to display information for the specific group, or for the list of groups that contain the partial entry.

**Search by On-Call Group Name**

a. Enter the name of an on-call group in the **Name** field. The name must match exactly with a name in the database. If you are not sure of the name, enter the wildcard character (%) followed by a partial name.

b. Click the **Search** button to display information for the specific group, or for the list of groups whose names contain the partial entry.

6. When you click the search button, the Historical Calendar Search screen redisplayes, showing the search results.
7. A group with a yellow folder next to it has other groups associated with it. Click on the plus sign next to the folder to display the associated groups.

8. A group name that displays as a link has an on-call calendar associated with it. Click the linked name to display the calendar in a new browser window. The current month is displayed by default.
9. The group members who are on-call for each day are listed in the calendar with their on-call times shown. The on-call assignments for a member who has consecutive on-call shifts are shown in color. Different colors are used for separate runs of consecutive shifts.

10. You can display a calendar for a different month by choosing a different month and year from the date list boxes. You can also click the blue directional arrows to scroll through the months.

11. Click on a member’s name to display detailed information about that member. The Detail Information screen displays in a separate browser window. Close the browser window to close the screen.

12. To refresh the screen, click the Refresh button.

13. Click the Print button to print the calendar. The Print dialog box displays, from which you can choose the appropriate print options.

14. You can display on-call group information for the group members for one day by clicking the search icon for the selected day. The On-Call Search screen displays. On-call assignments for the current day display in green.
15. The information in this screen is sorted by default by the start date listed in the **Start** column. You can change the sort column by clicking on any column name that displays as a linked name: **On-Call Group**, **Msg ID**, **Name**, **Start**, or **End**. An arrow displays next to the name of the sort column.

16. You can limit the information in the window by filtering the list by month and year. From the list boxes in the **Filter Schedules By** field, select a month and year, then click the **Go** button. The updated list displays.

17. To display information about a person in a group, click on the person’s name. An information box displays. Move the cursor off the person’s name to close the box.

18. The on-call group information listed in the screen can be printed or saved as a Microsoft Word or Excel file. You must have these applications installed on your computer to be able to save a file in these formats. From the **Send Output To** list box, choose one of the following options:
- **Printer**: This option is the default. Select this option, then click the Go button. The standard Print dialog box displays, from which you can select the desired printer and print the on-call schedule.

- **MS Word**: Select this option, then click the Go button. A message box displays, showing you the name of the Word file that will be downloaded. Click the Save button to save the file.

- **MS Excel**: Select this option, then click the Go button. A message box displays, showing you the name of the Excel spreadsheet file that will be downloaded. Click the Save button to save the file.
Paging

Overview and Steps

Within Smart Web, you can page a group or an individual. If the group or group member cannot be paged, you can choose to leave a message with an operator.

For a member to be able to receive a page, the member must have the following:

- a published messaging ID
- a pageable status
- an operable pager

You can also create your own messaging groups that can be used for future pages.

1. Access Smart Web.
2. Choose the Paging menu option. The Paging screen displays.
3. Search for a person or a group you want to page by entering information into the **ID**, **Name**, or **Department** fields. An entry made must exactly match the entry in the database. If you are not sure of the exact entry, enter the wildcard character (%) into the field followed by a partial entry. Any entry that contains the partial entry is included in the search results.

4. Click the **Search** button. Paging information for the groups or individuals that match the search criteria are displayed in the center section of the screen.

   a. If the individual or group is being covered by someone else, a message dialog displays:

   ![Message Dialog Example](image)

   b. Click the **OK** button to send a page to the covering individual. This individual’s name is included in the list of individuals or groups that will be paged at the bottom section of the screen.

   c. Click the **Cancel** button if you do not want to send a page to the covering ID. A message dialog displays:

   ![Message Dialog Example](image)

   d. Click the **OK** button if you want to store a message for the original individual or group. Paging information about the individual or group displays in the center section of the screen. This individual’s name is included in the list of individuals or groups that will be paged at the bottom section of the screen.

   e. Click the **Cancel** button if you do not want to send a message. Paging information about the individual or group displays in the center section of the screen. This individual’s name is not included in the list of individuals or groups that will be paged at the bottom section of the screen.
5. In the search results section, click the box in the **Add To List** column next to the names of the members or groups to whom you wish to send a page.

   - If you select an individual who cannot be paged, a message box displays. Click the **OK** button to store a message with the operator and close the message box. Click the **Cancel** button if you do not want to store a message.

   - If you select a group that cannot be paged, a message box displays. Click the **OK** button to close the message box. The group name is not added to the recipient list.
6. Continue to search and add members and groups to the recipient list at the bottom of the screen. Click on the Next 25 Records, Prev 25 Records, or Next n Records buttons to scroll through the names in the search results section.

7. If you have included a group or member in the list in error, select the recipient, then click the Remove Recipient button. The name is removed from the list. To remove all of the recipients in the list, click the Clear List button.

8. You can save the recipient list you have created as a paging group. Enter a descriptive name for the group in the Name field, then click the Save Group As button. This group name displays in the Message Group section, and can be selected from the Name list box. Select the group name, then click the Add to List button to add the members of this group to the recipient list.
You can delete a paging group by selecting the group name from the **Name** list box, then clicking the **Delete Group** button. The group name no longer is an option in the Message Group section.

9. When the selections for the recipient list are complete, click the **Send Page** button to send a page to the recipients. The Paging screen displays in a new browser window.
10. In the **Callback Number** field, enter the phone number that the page recipient should call to respond to the page. The number of characters you are allowed to enter in this field displays in the **Remaining Characters** field. The field is updated as you type in an entry.

11. In the **Message** field, enter the text of the message. If the **Common Page Type** field entry is NUMERIC you are only allowed to enter characters from this set: 0123456789#*-.. The number of characters you are allowed to enter in this field displays in the **Remaining Characters** field. The field is updated as you type in an entry.

12. Click the **Clear** button if you need to reset the fields in the screen.

13. If you do not want to send this page, click the **Cancel** button.

14. Enter the text of the message in the field. The type of page you can send, numeric or alphanumeric, displays in the **Common Page Type** field. If the type is **Alpha**, all pagers are alphanumeric. If the type is **Numeric**, at least one pager is numeric. You can enter up to 80 characters. As you enter the message, the number of characters left to enter displays in the **Remaining Characters** field.

15. If you do not want to send a page, click the **Cancel** button.

16. Click the **Send** button to send the page. If a pager is not operable, the pages that cannot be sent are listed in the screen.

- Choose the **Mark Here To Resend** option to resend the page at a later time.

- Choose the **Send As Message** option to send the page as a message, which is stored with the operator.

17. Click the **Proceed** button to continue the paging process. Click the **Cancel** button to cancel the page and return to the main Paging screen.

18. When you click the **Proceed** button, the page is sent. A confirmation screen displays when the page has successfully been sent to the queue.
Scrolling Roster

Overview and Steps

Within Smart Web, you can display a scrolling list of the individuals who have messages waiting.

1. Access Smart Web.

2. Choose the **Scrolling Roster** menu option. The Scrolling Roster screen displays. Within this screen, a list of the members who have messages continually scrolls upward. The message list shows who has messages, how many messages they have, and their current status.

3. You can change the sort column for the roster by clicking one of the **Sort By** buttons: **Msg Count**, **Name**, or **Status**. A yellow arrow displays on the button to show the current sort selection.
4. You can display only the messages of a specified status type by selecting a status from the Filter By list box. Choose the Show All Records option to include all status types in the roster.

5. The Auto Refresh counter counts down the number of seconds until the roster is automatically refreshed. You can manually refresh the roster by clicking the Refresh button. The automatic counter is also reset.

6. You can pause the roster to view the roster by clicking the Pause button. The roster stops scrolling, and the Pause button toggles to the Scroll button. Click the Scroll button to restart the scroll.

7. The Printable View button enables you to display the roster in a printable format. Click the Print button to print the roster. Click the Back button to return to the scrolling roster.

<table>
<thead>
<tr>
<th>Message</th>
<th>Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Agnes Lee</td>
<td>OUT OF HOSPITAL NOT AVAILABLE</td>
</tr>
<tr>
<td>4</td>
<td>Aimee Pierce</td>
<td>IN HOSPITAL ON PAGE</td>
</tr>
<tr>
<td>4</td>
<td>Alan Chavez</td>
<td>OUT OF HOSPITAL NOT AVAILABLE</td>
</tr>
<tr>
<td>4</td>
<td>Alberta J Black</td>
<td>OUT OF HOSPITAL NOT AVAILABLE</td>
</tr>
<tr>
<td>7</td>
<td>Alec Jay Crawford</td>
<td>OUT OF HOSPITAL NOT AVAILABLE</td>
</tr>
<tr>
<td>4</td>
<td>Alejandro Joe Dean</td>
<td>OUT OF HOSPITAL NOT AVAILABLE</td>
</tr>
<tr>
<td>4</td>
<td>Alejandro Joe Dean</td>
<td>OUT OF HOSPITAL NOT AVAILABLE</td>
</tr>
<tr>
<td>4</td>
<td>Alexis Sherman</td>
<td>OUT OF HOSPITAL NOT AVAILABLE</td>
</tr>
<tr>
<td>4</td>
<td>Alexis Sherman</td>
<td>OUT OF HOSPITAL NOT AVAILABLE</td>
</tr>
<tr>
<td>4</td>
<td>Alfred Franklin</td>
<td>OUT OF HOSPITAL NOT AVAILABLE</td>
</tr>
<tr>
<td>4</td>
<td>Alexis Clare Stein</td>
<td>OUT OF HOSPITAL NOT AVAILABLE</td>
</tr>
<tr>
<td>4</td>
<td>Alison Stephens</td>
<td>OUT OF HOSPITAL NOT AVAILABLE</td>
</tr>
<tr>
<td>4</td>
<td>Alison Stephens</td>
<td>OUT OF HOSPITAL NOT AVAILABLE</td>
</tr>
<tr>
<td>4</td>
<td>Allan K Grant</td>
<td>OUT OF HOSPITAL NOT AVAILABLE</td>
</tr>
<tr>
<td>4</td>
<td>Allan Gray</td>
<td>OUT OF HOSPITAL NOT AVAILABLE</td>
</tr>
<tr>
<td>4</td>
<td>Allen Gray</td>
<td>OUT OF HOSPITAL NOT AVAILABLE</td>
</tr>
<tr>
<td>4</td>
<td>Alma Diana Stewart</td>
<td>OUT OF HOSPITAL NOT AVAILABLE</td>
</tr>
<tr>
<td>4</td>
<td>Alma Diana Stewart</td>
<td>OUT OF HOSPITAL NOT AVAILABLE</td>
</tr>
<tr>
<td>4</td>
<td>Brady, Abraham R Sr</td>
<td>AVAILABLE BY PHONE PLEASE CALL MY OFFICE</td>
</tr>
<tr>
<td>10</td>
<td>Brady, Abraham V</td>
<td>OUT OF HOSPITAL NOT AVAILABLE</td>
</tr>
<tr>
<td>1</td>
<td>Clyde Vincent Johnson</td>
<td>OUT OF HOSPITAL NOT AVAILABLE</td>
</tr>
</tbody>
</table>
Personal Profile

Overview and Steps

The **Personal Profile** menu option enables you to update your own directory and status information, add or change an exception, and view and archive messages. You can also change your email address and password.

1. Access Smart Web.
2. Choose the **Personal Profile** menu option. The Personal Profile screen displays.
3. Enter your user ID and password.
4. Click the **Sign In** button. The profile information for the individual displays.
5. The top section of the screen displays basic information for the individual.
   - In the Current Exceptions section, you can change the end date for an exception by changing the date in the **End** field. You can manually enter a new date, or click the calendar button to select a date from the calendar. Click the **Save** button to save the change.
   - You can delete the exceptions listed in the Current Exceptions section by clicking the **Delete** button.

6. Each of the tabs in this screen enables you to update information for the individual. In each tab, links are available for you to change your password, log out of the Personal Profile screen, and refresh the information in the tab.
   - To change your password, click the **Change Password** option. The Personal Profile screen displays. Enter the current password in the **Old Password** field. Enter the new password in the **New Password** field, and verify the entry in the **Verify Password** field. The password must be numeric-only and have at least four numbers. Click the **Submit** button to update the password.
Click the **Logout** option to log out of the Personal Profile screen. The Login in screen redisplay. You can re-login, or another user can log in.

Click the **Refresh** option to update the information on the screen.

**Directory Tab**

The **Directory** tab contains title, phone number and location information for the individual. You can update or delete existing information, or add new information.

**Updating Directory Information**

1. Select the record you want to update by clicking the button next to the **Title** column.

2. Click the **Edit** button. The Add New Directory Information screen displays.
3. Update the information as desired. The address fields are display fields that are populated when you make a selection in the Building and Address Type fields.

4. To revert to the original entry, click the Reset button. You must click this button before you have saved any changes.

5. Click the Save button to save the changes.

Deleting an Item

1. Select the record you want to delete by clicking the button next to the Title column.

2. Click the Delete button. A message displays, verifying that you want to delete the selected record.

3. Click the Yes button to delete the record. Click the Cancel button if you do not want to delete the record.

Adding an Item

1. Click the New button to add an item. The Add New Directory Information screen displays. All fields are blank.

2. Make the appropriate entries. For the fields that have list boxes, you can select an option from the list box.
3. The address fields can either be entered manually, or can be populated with a stored address. To select a stored address, select a building option from the Building field, then an address type option from the Address Type field.

4. Click the Save button to save the entry.

**Status Tab**

The Status tab enables you to change the status for the individual.

1. Click the Status tab to display the Status Update screen.

![Status Update Screen](image)

2. From the status list, select the new status for the individual.

3. Click the Update button to make the change. The new status displays in the Personal Profile screen for the individual.

**Exception Tab**

The Exception tab enables you to add, edit, or delete exceptions to the individual’s listing. Three types of exceptions can be added: coverage, referral, and page block. Click the Exception tab to display the Exception Update screen.

![Exception Update Screen](image)
Adding an Exception

1. In the Add New Exceptions section, select an exception type. Options are: Coverage, Referral, and Page Block.
2. Click the Continue button to add the exception. The Add New Exception screen displays.

3. The type of exception selected displays in the Exception Type field.
4. The information required for the first field changes for each type of exception. Enter the information required.

<table>
<thead>
<tr>
<th>Exception Type</th>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coverage</td>
<td>Messaging ID</td>
<td>The identification number of the person covering for the individual.</td>
</tr>
<tr>
<td>Referral</td>
<td>Phone Number</td>
<td>The phone number to be called if a referral is required.</td>
</tr>
<tr>
<td>Page Block</td>
<td>Message</td>
<td>The message stating that the pager is not accepting pages.</td>
</tr>
</tbody>
</table>

5. Select the start and end date and time in the Start and End fields. You can enter the date and time manually, or you can use the calendar button to display a selection calendar.
6. Specify a time zone in the Time Zone field.
7. Enter any notes in the Remark field.
8. Click the Save button to save the new exception. The exception displays in the Exception tab.

Deleting an Exception

1. In the Future Exceptions section, click the Delete button next to the exception you want to delete.
2. A message displays, verifying that you want to delete the exception. Click the OK button to delete the exception and close the message box.
Updating an Exception

1. In the Future Exceptions section, click the **Edit** button that is next to the exception you want to update. The Edit Exception screen displays.

   ![Edit Exception Screen](image)

2. Make changes to the exception as needed. The dates between two exceptions cannot overlap. If an overlapping date is entered you are not allowed to save the change.

3. Click the **Save** button to save the changes and update the exception information.

Active Messages Tab

The **Active Messages** tab enables you to archive any existing messages. Archived messages no longer displayed in the active message list.

1. Click the **Active Messages** tab. The Active Messages screen displays.

   ![Active Messages Screen](image)

2. In the **Select To Archive** column, click in the box next to the message you want to archive. You can choose more than one. To select all messages, click the **Select All** button. A checkmark displays in the box next to a selected message.

3. Click the **Archive** button to archive the selected message(s). The message is removed from the list. You can review archived messages in the **Archived Messages** tab.
Archived Messages Tab

The **Archived Messages** tab enables you to view messages that have been archived in the **Active Messages** tab.

1. Click the **Archived Messages** tab. The Archived Messages Update screen displays. Within this screen you can review the archived messages.

![Archived Messages Update](image)

Email Tab

The **Email** tab enables you to add a new email address and update or delete existing email addresses.

![Email Update](image)

Adding an Email Address

1. In the **New Email** fields, enter an order number in the first field. 1 has the highest priority.
2. In the second field, enter the email address.
3. Click the **Add Email** button. A message screen displays, and the email address is added to the list of emails.
4. Click the **OK** button to close the message screen.

**Changing an Email Address**

1. In the row for the email address, you can change the order number and the address by typing over the existing order and address.
2. Click the **Save Changes** button to save the changes. The Update Email Addresses message screen displays to show that the change has been saved.

3. Click the **OK** button to close the screen.

**Deleting an Email Address**

1. In the **Select** column for an email that you want to delete, click in the option box. You can select more than one email address.
2. Click the **Delete Email** button. The Confirm Delete Email screen displays, showing the emails you selected for deletion.
3. Click the **OK** button to delete the email addresses. The Delete Email screen displays to show that the email addresses have been deleted.

4. Click the **OK** button to close the screen.
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