While every attempt is made to ensure both accuracy and completeness of information included in this document, errors can occur, and updates or improvements may be implemented without notice. For these reasons, Startel cannot accept responsibility for the complete accuracy of this data.


All other brand and product names are trademarks or registered trademarks of their respective holders.

Part Number: 15-1545-080

© Copyright 2012 by Startel Corporation

The information contained herein is proprietary to, and considered a trade secret of, Startel Corporation, and shall not be reproduced, transmitted, transcribed, or stored in any retrieval system in any form or by any means, electronic, mechanical, magnetic, optical, chemical, manual, or otherwise, without the express written permission of Startel Corporation, 16 Goodyear, Bldg. B # 125, Irvine, California 92618, U.S.A.

Revision Date: January 14, 2013
# Table of Contents

- **Introduction** ............................................................................................................... 7
- **Understanding the Appointment Scheduler** ............................................................. 9
- **Appointment Scheduler Basics** ................................................................................ 10
  - What is the Appointment Scheduler? ..................................................................... 10
  - Launching the Appointment Scheduler from a URL ........................................... 11
  - Setting Up the Appointment Scheduler ............................................................... 12
    - Using the Appointment Scheduler .................................................................. 12
- **Introduction to the Appointment Scheduler Interface** ............................................ 14
  - Site Admin Summary ......................................................................................... 15
  - Settings Summary ............................................................................................ 17
  - Providers Summary .......................................................................................... 19
  - Calendar Summary ............................................................................................ 20
  - Address Book Summary .................................................................................. 21
  - Manage Appointments Summary ..................................................................... 22
- **Using the Appointment Scheduler** ........................................................................ 23
  - Site Admin ......................................................................................................... 24
    - Site Admin > Site Information > Appearance ................................................ 25
    - Site Admin > Site Information > Schedules .................................................... 26
      - Adding a Schedule ..................................................................................... 27
Site Admin > Site Information > Roles ..................................................... 28
  Copying Site User Roles to Schedules ............................................... 29
  Adding a Site User Role ....................................................................... 30
  Add/Edit Role Settings ....................................................................... 31
  Copying a Site User Role ....................................................................... 33
  Copying a Role to Schedules ................................................................. 34
Site Admin > Site Information > Access Groups ...................................... 35
  Adding an Access Group ....................................................................... 36
  Configuring an Access Group ................................................................. 38
Site Admin > Site Information > Users ..................................................... 39
  Adding a Site User .................................................................................. 40
  Defining a Default Site User Account .................................................... 41
Site Admin > Reports ................................................................................. 42
  Generating an Activity Log Report ........................................................... 43
  Sorting Activity Log Items .................................................................... 44
  Generating a Billing Report ................................................................. 45
Settings ............................................................................................................ 48
Settings > Schedule Information............................................................... 49
  Updating Contact Information for a Schedule ........................................ 49
  Configuring the Appearance for a Schedule .......................................... 50
  Configuring Roles for a Schedule ............................................................. 52
  Add/Edit Role Settings ........................................................................ 54
  Editing, Copying, and Deleting Roles .................................................... 56
  Configuring Users for a Schedule ............................................................. 57
  Editing, Copying, and Deleting Users .................................................... 60
Settings > Calendar Setup......................................................................... 60
Configuring Calendar Settings ..............................................................60
Calendar Settings .................................................................................61
Configuring Appointment Types ...........................................................64
Add/Edit Appointment Type Settings ....................................................65
Settings > Email Setup........................................................................... 66
Configuring Confirmation Settings .......................................................66
Configuring Reminders ........................................................................68
Configuring Email Formats ..................................................................69
Settings > Address Book Setup............................................................ 71
Configuring Custom Fields for an Address Book ...............................71
Add/Edit Custom Fields .....................................................................73
Providers ................................................................................................75
Providers > Provider Information ....................................................... 76
Entering Contact Information for a Provider ........................................76
Deleting a Provider ..............................................................................79
Providers > Provider Setup ............................................................... 80
Configuring Provider Work Days .......................................................80
Add/Edit Provider Work Day Settings .................................................82
Configuring Provider Appointment Types ...........................................84
Add/Edit Provider Appointment Type Settings ....................................85
Calendar...................................................................................................87
Scheduling an Appointment in Calendar ............................................88
Using the Calendar Block Out Feature................................................92
Address Book..........................................................................................95
Grouping & Sorting Address Book Items .............................................96
Adding an Address Book Entry .............................................................97
The **Startel Appointment Scheduler** is a Startel-hosted remote service that integrates with the Startel CMC platform. Requiring no local installation, this web-based application can be used by both your agents and your clients to schedule appointments from anywhere that has an Internet connection. When integrated into the CMC Administrative Controls software, it can also be used to manage appointments from Agent Interface client screens.

This document describes how to configure and use the Startel Appointment Scheduler interface.

Chapters include:

- **Chapter 1: Understanding the Appointment Scheduler** *(page 9)*
  
  This chapter introduces concepts and features that are fundamental to the Appointment Scheduler application. Topics in this section include:
  - Appointment Scheduler Basics;
  - Launching the Appointment Scheduler From a URL;
  - Setting up the Appointment Scheduler;
  - Introduction to the Appointment Scheduler Interface.

  Startel strongly recommends that you read this section before you begin configuring the application.

- **Chapter 2: Using the Appointment Scheduler** *(page 23)*
  
  This chapter provides details on each of the sections, screens, and settings that comprise the Startel “Appointment Scheduler” interface. It also steps you through all the procedures necessary for configuring and using the Appointment Scheduler application.

- **Chapter 3: Integrating the Appt. Scheduler into your CMC** *(page 111)*
  
  This chapter shows you how to integrate the Appointment Scheduler application into your Startel CMC (11.0 or above) by configuring elements in the Admin Controls *Site Settings, Client Maintenance*, and *Agent Maintenance* plug-ins. If you perform the simple procedures described in this chapter, agents will be able to access client Schedules from Agent Interface client screens.
Chapter 1: Understanding the Appointment Scheduler

This chapter introduces concepts and features that are fundamental to the Appointment Scheduler. Startel recommends that you read this section before you begin configuring the application. Sections include:

- **Appointment Scheduler Basics (page 10)**
  
  This section introduces important application terms and concepts, shows you how to launch the application, and gives you a “big picture” view of the major tasks involved in setting up the Appointment Scheduler for your site, and for each of your clients.

- **Introduction to the Appointment Scheduler Interface (page 14)**
  
  This section introduces the Appointment Scheduler interface, and summarizes the Navigation Menu sections that you and your clients will use to configure and use the Appointment Scheduler application.
APPPOINTMENT SCHEDULER BASICS

Before you begin using the Appointment Scheduler, it will be helpful to read this section, which describes the “basics” of the application, and gives a general overview of how the Appointment Scheduler is best used—by your agents and staff, and by clients who want to perform Scheduling tasks on their own.

Topics in this section include:

◆ What is the Appointment Scheduler? (page 10)
◆ Launching the Appointment Scheduler from a URL (page 11)
◆ Setting Up the Appointment Scheduler (page 12)

What is the Appointment Scheduler?

The Startel Appointment Scheduler is a hosted service that integrates with the Startel CMC platform. Requiring no local installation, this web-based application can be used to schedule appointments from anywhere that has an Internet connection.

Access to application features and settings is controlled by User Accounts, which you will normally define for both your own agents and staff, and also for your clients, who will be able to access and manage features associated with their own Schedules.

Schedules are the centerpiece of the application. With the exception of the Site Admin section of the Graphical User Interface (GUI), every section of the software is Schedule-specific. That is, all the screens and settings apply to a specific Schedule. If your User Account gives you access to multiple Schedules, you will need to select the Schedule you want by clicking more ▼ at the top-right corner of the screen. This opens a menu listing the Schedules that you are authorized to access. If the application is accessed from Agent Interface, the Schedule for the current client displays automatically. When a client (Schedule-specific) User logs in to the application, that client’s Schedule is selected by default.
Launching the Appointment Scheduler from a URL

To launch the Appointment Scheduler using a browser, you will go to a defined URL, then enter the appropriate Username and Password in the displayed login page.

If you have not been provided with a URL, or with a Username and Password, speak to your System Administrator or a Startel representative.

When you have successfully logged in, the application opens to the Manage Appointments screen associated with the first Schedule (sorted alphabetically) that your User Account authorizes you to access.

If no Schedules have yet been defined for your site, the program opens to the Site Admin section.
Setting Up the Appointment Scheduler

Setting up the Appointment Scheduler is simple. The Appointment Scheduler GUI is organized into a logical set of sections and sub-sections that you access from an intuitive Navigation Menu.

Each Navigation Menu section and sub-section is summarized in this chapter under the heading, "Introduction to the Appointment Scheduler Interface". Chapter 3 fills in the details, providing complete information and step-by-step instructions for all the procedures that you and your clients will use to define and manage client Schedules.

Before you read and follow the instructions in these sections, review the topic that follows. It's designed to introduce important application terminology, and give you a “big picture” view of the major steps involved in setting up the Appointment Scheduler for your site, and for each of your clients.

Using the Appointment Scheduler

Before you start setting up the Appointment Scheduler application, read and understand the following Appointment Scheduler “Basics.” This information introduces basic terminology, describes important procedures, and provides details on how, and in what order, to use application setup features.

The Appointment Scheduler is a hosted web application that can be accessed using any Browser. It can also be set up to be accessible from client screens in Agent Interface (see page 111).

You can set up the application so that both your agents and your clients can perform scheduling tasks—your agents for multiple Schedules (if appropriate), and your clients for their own Schedules.

Access to Schedules and Appointment Scheduler features is controlled by User Accounts. You will set up staff/agent “Site User” Accounts in the Site Admin section. Client User Accounts are configured in the Settings section. And note:

- You can give any Site User full Administrator privileges by checking a Site Admin checkbox in the Site Admin User setup screen (see page 41). With full Administrator privileges, a Site User is a Site Admin User, with access to all Appointment Scheduler features, and all client Schedules.
- To define Site Users who will NOT have full access rights, you must first define Roles and Access Groups in the Site Admin section.
Schedules are the centerpiece of the Appointment Scheduler application. For every client for whom scheduling will occur, you will need to define a Schedule. This process initially involves defining a name and Contact Information for the Schedule in the Site Admin section. Once a Schedule is defined in Site Admin, additional settings must be configured for the Schedule in the Settings and other sections of the application.

The Settings section of the application contains features for defining Schedule-specific:

- GUI appearance (i.e., Appointment Scheduler color scheme and logo)
- Roles
- User Accounts
- Calendar Properties
- Appointment Types
- Email Confirmations & Reminders
- Address Book fields

In addition to configuring Schedule Settings, it’s necessary to define Providers for each client Schedule. Providers are the persons or resources that will be available to provide services. (A Provider doesn’t have to be a person. It can be a “resource” like a conference room, or motor vehicle.) Providers are defined for a Schedule in the Providers section of the application.

Persons who will be scheduled for appointments with Providers are referred to as appointment Attendees, or Contacts. These need to be added to the Schedule’s “Address Book.” Contacts can added to the Address Book in the Address Book section of the application, or “on the fly” at the time an appointment is Scheduled. (Appointments can be scheduled in both the Calendar and Manage Appointments sections.)

Once you have Schedules and User Accounts set up and ready to go, qualified Users can use the application to schedule and manage appointments.

Appointments can be scheduled in a Calendar environment in the Calendar section, or a List environment in the Manage Appointments section.

The Manage Appointments section is generally recommended for use by agents who will be scheduling appointments for persons calling in, since this section is more Attendee-centric. The Calendar section, which is more Provider-centric, is best used when Provider availability is the focus.

See “Calendar” on page 88 and “Manage Appointments” on page 101 for complete information on Appointment Scheduling in these two sections.
INTRODUCTION TO THE APPOINTMENT SCHEDULER INTERFACE

The web-based Appointment Scheduler interface consists of multiple sections that you will access using a Navigation Menu that runs across the top of the screen.

Before you start using the program, you are advised to read this introduction to the interface, which summarizes each of the sections and sub-sections that you and your clients will use to configure and use the Appointment Scheduler.

Topics in this section include:

- Site Admin Summary (page 15)
- Settings Summary (page 17)
- Providers Summary (page 19)
- Calendar Summary (page 20)
- Address Book Summary (page 21)
- Manage Appointments Summary (page 22)
Site Admin Summary

The **Site Admin** section of the Appointment Scheduler interface is where you configure site-wide settings, and set up “Site Admin” User Accounts for the agents and staff who will be using the Appointment Scheduler.

This is also where you run Activity Log and Billing reports, and, most importantly, where you add and delete **Schedules**, which are the centerpiece of the Appointment Scheduler application.

To access this section, select **Site Admin** from the Appointment Scheduler Navigation Menu.

Site Admin is organized into the multiple sub-sections, which you access by selecting from the Menu Box on the left side of the screen. Sub-sections include:

- **Site Information > Appearance**: Displays a screen that you can use to customize the “Default” appearance of your Appointment Scheduler interface. You can change the default color scheme—or “skin”—and, if you like, replace the Startel logo with a different logo. For complete information, see "**Site Admin > Site Information > Appearance**" on page 25.
◆ **Site Information > Schedules:** Opens the screen that is used to initially define the Schedules for your clients. **Schedules** are the centerpiece of the Appointment Schedular application. In all sections of the Appointment Scheduler interface—**with the exception of Site Admin**—the settings and features that you see apply to the specific Schedule that is selected in the upper-right corner of the screen. For complete information, see "**Site Admin > Site Information > Schedules**" on page 26.

◆ **Site Information > Roles:** Allows you to define the “Roles” that are available to Site Users. Having different kinds of Roles allows you to give different levels of access and privileges to the agents and staff who will be using the Appointment Schedular application. For complete information, see "**Site Admin > Site Information > Roles**" on page 28.

◆ **Site Information > Access Groups:** Allows you to define “Access Groups” for your Site Users. Access Groups are similar to Roles, only they combine the privileges associated with Roles with a list of Schedules that Access Group members can access. For complete information, see "**Site Admin > Site Information > Access Groups**" on page 35.

◆ **Site Information > Users.** Once Roles and Access Groups are defined for your site, this section is used to set up your Site User Accounts. Site Users are the agents and staff who will be using the Appointment Schedular for your site. *(Client User Accounts are set up elsewhere, at Settings > Schedule Information > Users.)* For complete information, see "**Site Admin > Site Information > Users**" on page 39.

◆ **Reports > Activity Log:** Opens a screen from which you can generate an Activity Log report. An Activity Log report allows you to see the User Activity that has occurred in the Appointment Schedular for a given Schedule. For complete information, see "**Generating an Activity Log Report**" on page 43.

◆ **Reports > Billing:** Opens a screen from which you can generate Billing reports. For complete information, see "**Generating a Billing Report**" on page 45.
If the logged in User is only authorized to access one Schedule, that Schedule is selected automatically, and the more menu does not appear.

The Settings section of the Appointment Scheduler application allows you to configure different types of settings for the Schedules initially defined in the Site Admin section. For example, this is where you define Schedule-specific Roles, and Users, and where you define the appearance of Schedule-specific interface screens.

To access the Settings section, select Settings from the Appointment Scheduler Navigation Menu. To select the Schedule that you want to work on, click more ▼ (upper-right corner), then select the Schedule name from the drop-down menu.

The Settings section contains multiple sub-sections, which you access by selecting from the Menu Box on the left side of the screen. Sub-sections include:

- **Schedule Information > Contact Information**: Allows you to review or edit the "Primary Schedule Contact" information that was entered when the Schedule was created in the Site Admin section. For complete information, see "Updating Contact Information for a Schedule" on page 49.

- **Schedule Information > Appearance**: Opens a screen where you can customize the logo and set the color scheme (aka "skin") for the selected Schedule’s User Interface. For complete information, see "Configuring the Appearance for a Schedule" on page 50.
Schedule Information > Roles: Allows you to configure Roles for the selected Schedule. Configuring Roles for a Schedule is like configuring Site Admin Roles, only these Roles will be assigned to client Users who are only able to access their own Schedule. For complete information, see "Configuring Roles for a Schedule" on page 52.

Schedule Information > Users: This is where you configure User Accounts for the selected Schedule. Configuring Users for a Schedule is like configuring Site Users, only these Users will be clients, not agents or staff, and they will only be able to access their own Schedules in the Appointment Scheduler application. For complete information, see "Configuring Users for a Schedule" on page 57.

Calendar Setup > Calendar Settings: Opens the screen from which you set up the Calendar that will be used for the selected Schedule. Calendar settings you define here determine such things as which Days and Times are shown on the Calendar, whether Recurring Appointments are supported by the Calendar, and the time increments that are displayed on the Calendar. For complete information, see "Configuring Calendar Settings" on page 60.

Calendar Setup > Appointment Types: This is where you define the “Appointment Types” that can be added to a Schedule’s Calendar. (For example, 30-minute Chiropractic Session, 1-hour Acupuncture Treatment, etc.). For complete information, see "Configuring Appointment Types" on page 64.

Email Setup > Confirmation Settings: Allows you to define Schedule-specific preferences for Appointment Confirmation email messages, which can be generated when appointments are created, updated, or cancelled. For complete information, see "Configuring Confirmation Settings" on page 66.

Email Setup > Reminder Settings: Allows you to configure Email Appointment Reminders for Providers and Attendees associated with the selected Schedule. For complete information, see “Configuring Reminders” on page 68.

Email Setup > Email Formats: Opens a screen where you can customize the formats that will be used for a Schedule’s Confirmation and Reminder emails. For complete information, see “Configuring Email Formats” on page 69.

Address Book Setup > Custom Fields: Allows you to add custom fields to a Schedule’s Address Book. (The Address Book is where you add Contact information for Appointment “Attendees.”) For complete information, see “Configuring Custom Fields for an Address Book” on page 71.
Providers Summary

The Providers section of the Appointment Scheduler interface is where Provider information is entered for each defined Schedule.

Providers are the Schedule-specific professionals or resources that can be scheduled to provide services for a given client/organization.

To access the Providers section of the application, select Providers from the Appointment Scheduler Navigation Menu. To select the Schedule that you want to work on, click more (upper-right corner), then select the Schedule name from the drop-down menu.

The Providers section contains multiple sub-sections, which you access by selecting from the Menu Box on the left side of the screen. Sub-sections include:

- **Provider Information > Contact Information**: Allows you to review or edit the Primary Schedule Contact information that was entered when the Schedule was created in the Site Admin section. For complete information, see "Updating Contact Information for a Schedule" on page 49.

- **Provider Setup > Workdays**: Allows you to define the Days and Hours that Schedule Providers are available for scheduling. For complete information, see "Configuring Provider Work Days" on page 81.
◆ Provider Setup > Appointment Types: Allows your to define the Appointment Types that can be scheduled for a Schedule’s Providers. For complete information, see "Configuring Provider Appointment Types" on page 85.

## Calendar Summary

The Calendar section of the Appointment Scheduler interface gives you a Calendar view of the selected Schedule, and allows a qualified User to add new appointments to the Calendar using a convenient “drag and drop” method.

To access this section, select Calendar from the Appointment Scheduler Navigation Menu. To select the Schedule that you want to work on, click more ▼ (upper-right corner), then select the Schedule name from the drop-down menu.

If appointments have already been scheduled for the displayed times, they appear on the Calendar, as shown below.
From the Calendar screen, you can add, view, edit, and delete appointments. You can also:

- Block out time periods as not available for scheduling.
- Switch the Calendar view between Day, Week, and Month.
- Move the Calendar backward or forward in time.
- Select the Providers and Appointment Types that you want represented in the Calendar.
- Select the day for which you want to see appointments (today’s date is selected by default).
- Hover your mouse over an appointment to see appointment details.

For more detailed information, see “Calendar” on page 88.

**Address Book Summary**

The Address Book section of the Appointment Scheduler interface is where Names, Addresses, and other Contact Information is entered for Schedule-specific Contacts. These will be the “Attendees” who will be scheduled for appointments with Providers.

To access this section, select Address Book from the Appointment Scheduler Navigation Menu. To select the Schedule that you want to work on, click more ▼ (upper-right corner), then select the Schedule name from the drop-down menu.

If Addresses have already been added for the selected Schedule, they are listed, as shown below.
From the Address Book screen, you can add, edit, and delete Contacts.

You can also use an Expand function to show appointments scheduled for a Contact, and export Address Book items to an Excel or CSV (Comma Separated Values) file.

For complete information, see "Address Book" on page 96.

Manage Appointments Summary

The Manage Appointments section of the Appointment Scheduler interface offers multiple features for adding and managing Appointment Scheduler appointments.

This is the section that will probably be most used by Client Users who will be scheduling appointments for their own organization.

To access this section, select Manage Appointments from the Appointment Scheduler Navigation Menu. If you have access to multiple Schedules, you can select the desired Schedule by clicking more (upper-right corner), then choosing from the drop-down menu.

From this screen you can add, edit, and delete appointments, and use a host of on-screen controls to manage appointments quickly and efficiently.

For detailed information, see "Manage Appointments" on page 101.
Chapter 3:
Using the Appointment Scheduler

This chapter provides details on each of the sections, screens, and settings that comprise the Startel “Appointment Scheduler” interface. It also steps you through all the procedures necessary for configuring and using the Appointment Scheduler application.

Chapter sections are organized to match the organization of application menus. That is, they correspond to Navigation Menu items, ordered from left to right. Primary sections include:

- Site Admin (page 24)
- Settings (page 48)
- Providers (page 75)
- Calendar (page 87)
- Address Book (page 95)
- Manage Appointments (page 100)

Note: Instructions in this User’s Guide assume the reader is a Site Administrator, with full access to all screens and features.
SITE ADMIN

The Site Admin section of the Appointment Scheduler interface is where you configure site-wide settings, and set up “Site User” accounts for the agents and staff who will be using the Appointment Scheduler. This is also where you run Activity Log and Billing reports, and, most importantly, where you add and delete Schedules, which are the centerpiece of the application.

To access this section, select Site Admin from the Appointment Scheduler Navigation Menu.

![Screenshot of the Site Admin section of theAppointment Scheduler interface.]

Notice the Menu Box that is highlighted in the sample screen. Selecting an item in this box displays features and settings associated with that item.

You can also access most of the same screens and settings by selecting from the “Site Setup Checklist.” (Report items are not available on this list.)

- **NOTE:** Most of the options in the Menu Box are under a Site Information heading, which is open by default. Additional “Report” options are displayed if you select the Reports heading in the Menu Box. When Report options are shown, Site Information items are hidden.
Refer to the following topics for details on how to configure each of the features associated with the Site Admin section.

- **Site Admin > Site Information > Appearance** *(page 25)*
- **Site Admin > Site Information > Schedules** *(page 26)*
- **Site Admin > Site Information > Roles** *(page 28)*
- **Site Admin > Site Information > Access Groups** *(page 35)*
- **Site Admin > Site Information > Users** *(page 39)*
- **Site Admin > Reports** *(page 42)*

### Site Admin > Site Information > Appearance

Selecting **Site Admin > Site Information > Appearance** displays a screen that you can use to customize the “Default” appearance of your Appointment Scheduler interface. You can change the default color scheme—or “skin”—and, if you like, replace the Startel logo with a logo of your own.

- **NOTE:** The appearance you choose here will be used in Site Admin screens, and also provide the “Default” appearance for Schedule-specific screens. See page 50 for details on how to customize the appearance for Schedule-specific screens.
To restore the original Default appearance, select the “Restore Logo to Default” checkbox and choose the Default “Skin” option.

Follow these steps to customize the Appointment Scheduler “Default” appearance:

1. Go to Site Admin > Site Information > Appearance.
2. If you want to replace the Startel logo with a logo of your own, use the Choose feature to select the path to the logo file. (The logo file should not exceed 50 KB, and can have any of the following file extensions: jpeg, jpg, gif, png, bmp.)
3. To choose a color scheme, or “skin,” for the Default interface, select from the Skin drop-down menu. (You will probably want to experiment with different options before making a final selection.)
4. Click Save to save.

Site Admin > Site Information > Schedules

Selecting Site Admin > Site Information > Schedules displays the screen that you use to add the Schedules that you will manage for your clients.

Schedules are the centerpiece of the Appointment Scheduler application. In all sections of the Appointment Scheduler interface—with the exception of Site Admin—the settings and features that you see apply to the specific Schedule that is selected in the upper-right corner of the screen.

The Site Admin Schedules screen is where you initially add your Schedules. You can also delete Schedules and edit basic Schedule parameters, if necessary.

To add a new Schedule: Click . (See “Adding a Schedule” on page 27.)
To edit a listed Schedule: Click the 💎 icon associated with the Schedule.

To delete a listed Schedule: Click the ✗ icon associated with the Schedule.

Adding a Schedule

To add a Schedule to the list of Schedules that you will set up and manage using the Appointment Scheduler, you need to fill in a screen that defines some simple Schedule information, including the Business Name associated with the Schedule, the Contact information for the person who will serve as the primary Contact for the Schedule, and an Account ID that links the Schedule to a client in Client Maintenance.

Follow these steps to add a new Schedule:

1. Go to Site Admin > Site Information > Schedules.

   The Add/Edit Schedule dialog box is displayed. Required settings are marked with red stars.

In a CMC system, it’s recommended (for billing) that you enter an Account ID that matches the client’s Account Number in Client Maintenance.
2 Fill in this screen with information appropriate for the client associated with this Schedule.

- **NOTE:** If you have a Startel CMC system it’s recommended, for billing purposes, that you enter an **Account ID** that matches the **Account Number** assigned to the associated client in Client Maintenance.

3 If you do NOT want the Schedule to be immediately active (it has an “active” status by default), click the [ ] icon in the upper-right corner of the screen. This changes the Schedule’s status to **Disabled**.

4 When you’re finished, click **Save**.

### Site Admin > Site Information > Roles

Selecting **Site Admin > Site Information > Roles** displays the screen that you use to define the “Roles” that are available to Site Users. Defining different kinds of Site User Roles allows you to give different levels of access and privileges to the agents and staff who will be using the Appointment Scheduler application.

- **NOTE:** There is no “Site Administrator” Role provided by default in the Site Admin > Roles section. **However**, there is a **Site Admin** option associated with every Site User Account. If you select this **Site Admin** option for a User, the User will be a **Site Admin User**, with full access and privileges in all parts of the Appointment Scheduler interface. See page 41 for more information.
In the Site Admin > Roles screen you can add as many Roles as you like. You can also edit existing Roles, copy Roles, copy Roles to Schedules, and delete Roles.

- **To add a new Role**: Click ![Add new role](image). (See page 30.)
- **To edit a Role**: Click the pencil icon for the Role.
- **To copy a Role**: Click the clipboard icon for the Role. (See page 33.)
- **To copy a Role to a Schedule**: Click the clipboard icon for the Role. (See page 34.)
- **To delete a Role**: Click the close icon for the Role.

---

### Copying Site User Roles to Schedules

Roles you define for Site Users can be copied to individual Schedules for use by Schedule-specific Users. For most sites, this “Copy Role to Schedule(s)” feature is the most efficient means of defining Roles for Schedules.

With this in mind, Startel recommends that, to start, you consider defining Roles like the following:

- **View Only**: A View-Only Role would give Users “View access” to Appointment Scheduler features, but not the ability to make changes in the application.
- **View/Add/Edit**: A View/Add/Edit Role would allow Users to View, Add, and Edit selected settings, but not Delete items in the application.
- **Full Access**: A Full Access Role, copied to a Schedule, would give Admin level privileges to Schedule-specific Users for their individual Schedules.
Adding a Site User Role

Follow these steps to add a new Site User Role:

1. Go to Site Admin > Site Information > Roles.
2. Click Add new role.
   - The Add/Edit Role dialog box is displayed:

   ![Add/Edit Role dialog box]

   Use the scrollbar on the right side of the screen to see the complete contents of the dialog box.

3. Configure this screen as described in the table that follows.
4. When you’re finished, scroll to the bottom of the screen and click Save.
## Add/Edit Role Settings

| Setting   | Instruction                                                                                                                                 |
|-----------|---------------------------------------------------------------- ***************************************************************************** |
| Role Name | Enter a descriptive name for the Role. (For example, *Agent Role,* or *View Add Edit.*)                                                 |

### Settings

Under the **Settings** heading, use the checkboxes to select the Role’s privileges (*View, Add, Edit, Delete*) in the Settings section of the Appointment Scheduler application.

- **Note:** For all categories, you must select the **View** option before you can select additional privileges.

#### Schedule Information

- **Contact Information:** Available choices: *View; Edit*
- **Appearance:** Available choices: *View; Edit*
- **Roles:** Available choices: *View; Add; Edit; Delete*
- **Users:** Available choices: *View; Add; Edit; Delete*

#### Calendar Setup

- **Calendar Settings:** Available choices: *View; Edit*
- **Appointment Types:** Available choices: *View; Add; Edit; Delete*

#### Email Setup

- **Confirmation Settings:** Available choices: *View; Edit*
- **Reminder Settings:** Available choices: *View; Edit*
- **Email Formats:** Available choices: *View; Edit*

#### Address Book Setup

- **Custom Fields:** Available choices: *View; Add; Edit; Delete*

### Providers

Under the **Providers** heading, use the checkboxes to select the Role’s privileges (*View, Add, Edit, Delete*) in the Providers section of the Appointment Scheduler application.

#### Provider Information

- **Contact Information:** Available choices: *View; Add; Edit; Delete*

#### Provider Setup

- **Work Days:** Available choices: *View; Add; Edit; Delete*
- **Appointment Types:** Available choices: *View; Add; Edit; Delete*
### Calendar

Under the **Calendar** heading, configure settings as follows to define the Role’s privileges in the Calendar section of the Appointment Scheduler application.

- **Calendar Allow Availability Override**: Select **Yes** or **No** to indicate whether the Role should allow a User to schedule an appointment in a time slot that shows no availability.

- **Calendar Appointment Type Override**: Select **Yes** or **No** to indicate whether the Role should allow a User to override defined Appointment Type durations when scheduling appointments in the Calendar section of the application. (See page 65 for more on Appointment durations.)

- **Calendar Appointments**: Select checkboxes to define standard privileges for the Calendar section of the application. Available choices: **View**; **Add**; **Edit**; **Delete**.

- **Calendar Block Out**: Select checkboxes to define privileges for the Calendar “Block Out” feature (see page 92). Choices: **View**; **Add**; **Edit**; **Delete**.

- **Calendar Recurrence**: Select **Yes** or **No** to indicate whether the Role should authorize a User to schedule Recurring Appointments in the Calendar section.

  **Note**: It is **not** possible to schedule Recurring Appointments in the Manage Appointments section. The Recurring Appointments feature is currently available in the Calendar only. If a Recurring Appointment is defined in the Calendar, the multiple resulting appointments do appear in the Manage Appointments section—however, they are “view only.”

### Address Book

Under the **Address Book** heading, configure settings as follows to define the Role’s privileges in the Address Book section of the Appointment Scheduler application.

- **Address Book Entry**: Select checkboxes to define standard privileges in the Address Book. Available choices: **View**; **Add**; **Edit**; **Delete**.

- **Address Book Export**: Select **Yes** or **No** to indicate whether the Role should allow a User to export Attendee data from the Address Book.
<table>
<thead>
<tr>
<th>Setting</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Appointments</td>
<td>Under the Manage Appointments heading, configure settings as follows to define the Role’s privileges in the Manage Appointments section of the Appointment Scheduler application.</td>
</tr>
<tr>
<td></td>
<td>• Appointment Export: Select Yes or No to indicate if the Role should allow a User to use the Manage Appointments “Export To Excel” function to export Appointment data to an Excel file.</td>
</tr>
<tr>
<td></td>
<td>• Manage Appointments: Select checkboxes to define standard privileges for managing appointments in the Managing Appointments section of the Appointment Scheduler. Available choices: View; Add; Edit; Delete. <strong>Note:</strong> To enable appointment scheduling, you’ll need to both enable these options and select the Yes option for the Scheduling setting.</td>
</tr>
<tr>
<td></td>
<td>• Schedule Allow Availability Override: Select Yes or No to indicate whether the Role should allow a User to schedule an appointment in a time slot that shows no availability.</td>
</tr>
<tr>
<td></td>
<td>• Scheduling: Select Yes or No to indicate whether the Role should allow the User to schedule appointments. <strong>Note:</strong> To enable appointment scheduling, you’ll need to both select Yes for this setting and enable Manage Appointments options.</td>
</tr>
</tbody>
</table>

**Copying a Site User Role**

Sometimes the quickest way to add a new Role is to copy a Role that is similar to the one you want to define, then edit the copied Role.

**Follow these steps to add a new Site User Role using the Copy Role feature:**

1. Go to Site Admin > Site Information > Roles.
2. Click the icon for the Role you want to copy.
   - The Roles dialog box for the selected Role opens, but with the Role Name field blank.
3. Type a name in the Role Name field.
4. Edit settings as necessary for the new Role. (See “Adding a Schedule” for details on specific settings).
5. Click Save to save and close.
   - The new Role now appears at the bottom of the Roles list. (Roles are listed in the order created.)
Copying a Role to Schedules

A Copy Role To Schedule option is offered for each Role you define in the Site Admin section. This feature makes it possible to copy Site Admin Role definitions to selected Schedules.

Once a Role has been copied to a Schedule, you can assign the Role to Users associated with that Schedule.

Follow these steps to copy a Role to one or more Schedules:

1. Go to Site Admin > Site Information > Roles to display the Roles screen.

2. Click the icon for the Role you want to copy to a Schedule (or Schedules). A dialog box opens with a list of all the Schedules defined for your site. The name of the Role you selected is shown at the top of the dialog box, under the heading Role to Copy.

Use the scrollbar in this dialog box, if necessary, to see the complete list of Schedules.
3  Do one of the following:
   • To copy the Role to a single Schedule, click on the Schedule name.
   • To copy the Role to a contiguous range of Schedules, click on the first item in the range, hold down the Shift key, then select the last item in the range.
   • To copy the Role to multiple non-contiguous Schedules, select each Schedule while holding down the Ctrl key.

4  Click Save to save and close.
   The Role is now available for User Accounts associated with the selected Schedule(s).

Site Admin > Site Information > Access Groups

Unlike Roles, Access Groups cannot be copied to Schedules. They are for Site Users only.

Selecting Site Admin > Site Information > Access Groups displays the screen that you use to define Access Groups for your Site Users.

Access Groups are similar to Roles, only they combine the privileges associated with Roles with a list of Schedules that Access Group members can access.

[Image of Access Groups screen]

➢ NOTE: Since part of defining Access Groups is assigning Schedules to groups, you may need to update Access Groups as you add new Schedules to the application.
In the Site Admin > Access Groups screen you can add as many Access Groups as you like. You can also edit existing Access Groups, and delete Access Groups.

- **To add a new Access Group:** Click \[\text{Add new group}\]. (See page 36.)
- **To edit an Access Group:** Click the \[\text{Edit}\] icon for the group.
- **To delete an Access Group:** Click the \[\text{Delete}\] icon for the group.

**Adding an Access Group**

Each Site User (with the exception of Site Admin Users) will be assigned to at least one Access Group. Access Groups determine the Schedules that Site Users can access, and the Role assignments that give Site Users their privileges in the Appointment Scheduler application.

**Follow these steps to add a new Access Group:**

1. Go to **Site Admin > Site Information > Access Groups**.
   
   A screen like the following is displayed. If any Access Groups have already been defined, they are listed in the screen, as shown.

2. Click \[\text{Add new group}\].

See page 39 for details on adding Site Users.
3 A dialog box similar to the following is displayed. The left side of the screen lists the Schedules defined in your application. The right side shows the Roles that have been defined.

![Add/Edit Group dialog box](image)

You can select multiple Schedules or Roles in this dialog box as follows:

- To select multiple contiguous items, click on the first item, hold down the **Shift** key, then select the last item.
- To select multiple non-contiguous items, select each item (Role or Schedule) while holding down the **Ctrl** key.

Right-clicking over a Role item opens a pop-up (“right-click”) menu. See page 38 for complete information.

4 In the **Name** field under the **Info** heading, type a name for the Access Group.

5 Read "Configuring an Access Group" on page 38.

6 Using one of the methods described in "Configuring an Access Group", specify the Schedule/Role combinations that are appropriate for this Access Group.

- **NOTE**: If you assign more than one Role to a Schedule, the combined Role privileges will apply to that Schedule.

When you’re finished, the dialog box will look something like the following:
Configuring an Access Group

To configure an Access Group, you need to select the Schedules that members of the group should be able to access, and, for each Schedule, specify the Role(s) that should apply to that Schedule. (If you assign more than one Role, the combined Role privileges apply).

There are multiple ways to assign Roles to Schedules in the Add/Edit Group dialog box. You can:

- Use your mouse to drag individual Roles to individual Schedules.
- Use features on a Roles “right-click” menu to assign one or more Roles to multiple selected Schedules, or All Schedules at once.

The Roles “Right-click” menu looks like this:

In the Roles “right-click” menu:
- Selecting **Add Selected > To Selected** assigns all selected Roles to the selected Schedules.
- Selecting **Add Selected > To All** assigns all selected Roles to ALL Schedules.

You can also use “Remove Selected” commands to remove Role assignments from selected or All Schedules.

See page 37 for details on selecting multiple Roles and Schedules in this screen.
User Accounts that will be used by your customers to manage their own Schedules are defined in the Settings section. See page 57 for details.

Once you’ve defined Roles and Access Groups for your site, you’ll be ready to set up Site User Accounts for your Site Users. Site Users are the agents and staff who will be using the Appointment Scheduler for your site.

Selecting Site Admin > Users displays the screen that you use to define and manage your Site User Accounts. If Site Users have already been defined for your site, they are listed in this screen.

In the Site Admin > Users screen you can add as many Site Users as you like. You can also edit existing Site Users, and delete Site Users.

- **To add a new Site User:** Click ![Add new user](page 40). (See page 40.)
- **To edit a Site User:** Click the ![Edit](icon for the User.
- **To delete a Site User:** Click the ![Delete](icon for the User.

**NOTES**

- By default, Site Users are listed alphabetically by User Name. However, you can sort by any column by simply clicking on the column heading. By default, items are sorted in ascending order. Clicking again on the same heading sorts by items in that column in the reverse order.
- When a User Account is “Active,” the Online and Locked Out columns show you if the User is presently logged in or “locked out” of the application. A User will be locked out if he/she enters the wrong password five times while attempting to log in. If a User gets locked out, an administrator will need to “unlock” the User Account by un-checking the Locked Out checkbox associated with the account.
Adding a Site User

Follow these steps to add a Site User:

1. Go to Site Admin > Site Information > Users.

2. Click + Add new user.

A dialog box like the following opens.

```
Add/Edit User

Last Login: Never
Required fields are marked with *

Name

User Name: Required
First Name: 
Last Name: 
Email: 

Password

Password: 
Confirm: 

Groups

Available Groups
- Agents
- Supervisors
- Customer Service
- Representative

User's Groups

Save  Cancel
```

The red stars in a dialog box identify required fields.

3. In the User Name field, enter the User Name that the Site User will need to type into the Username field in the Appointment Scheduler Login screen.

   **And note:** Since the Appointment Scheduler is a Startel-hosted application, ALL User Names across ALL sites must be unique. If you attempt to define a User Name that is not unique, an error will be reported when you attempt to Save.

4. Fill in the First Name and Last Name fields with the User’s first and last names. (See margin text.)

5. Optionally, specify an email address for the User.

For User Name and First and Last Name entries, you can use real names, or generic names (e.g., Agent User.) **But note:** Real names provide more specific information in Activity Log reports.
Under the Password heading, enter, then confirm, a password for the User Account. (Passwords are case sensitive, and must contain a minimum of 6 characters—including at least 1 capital letter, and 1 lower case letter.)

Do ONE of the following:

- Select the Site Admin checkbox if you want this Site User to be a Site Admin User, with total access to all Schedules, features, and functions in the Appointment Scheduler.
- In the Groups area, select an Access Group (or Groups) for this Site User by dragging from the Available Groups box to the User’s Groups box. (Access Groups provide Site Users with their Role assignments.)

NOTE: You can also select an Access Group by highlighting the name in the Available Groups box, then clicking the → arrow to move it to the User’s Groups box. To select ALL groups, click  

Notice the indicator at the top-right of the screen. This tells you that the User Account has an Active status. If you don’t want this Site User Account to be active at this time, click the “Active” indicator to replace it with a indicator.

Click Save to save and close.

Defining a Default Site User Account

To facilitate quick access to client Schedules in Agent Interface, you will need to define a “Default” Site User Account for your site. A “Default” Site User Account—which you will enable in the Site Settings plug-in—allows agents to access client Schedules from Agent Interface without having to log in to the Appointment Scheduler.

If you want a particular agent to be logged in with a different set of privileges than are defined for the Default account, you can assign a different Site User Account to that agent in Agent Maintenance (see page 114).

NOTE: Your Default Site User Account MUST have a unique name across all Startel hosted sites. Startel recommends you give it a name like ACME_Default.
Site Admin > Reports

Selecting Site Admin > Reports displays a pair of Report features that you can use to generate Activity Log Reports and Billing Reports.

- An Activity Log Report allows you to see the User Activity that has occurred in the Appointment Scheduler application for a selected Schedule. For more information, see “Generating an Activity Log Report” below.

- A Billing Report allows you to generate reports useful for customer billing. For more information, see "Generating a Billing Report" on page 45.

> NOTE: When the Reports heading is open in the Site Admin Menu Box, Site Information options (Appearance, Schedules, Roles, Access Groups) are hidden. To re-display these options, select Site Information in the Menu Box.
Generating an Activity Log Report

An Activity Log Report allows you to see detailed information on the User Activity that has occurred in the Appointment Scheduler for a given Schedule.

For example, in the sample report below, you can see, in the first line of the report, that on April 19, a User named PattyA edited the Appearance of the selected Schedule’s user interface in the Settings section. The second line tells you that on April 19 PattyA added a Role. And so on. Each line of the report details a different User activity associated with the selected Schedule.

Follow these steps to generate an Activity Log Report:

1. Select Site Admin from the Appointment Scheduler Navigation Menu.
2. In the Site Admin Menu Box, click the Reports heading to display Report options. (When Reports options are shown, “Site Information” options are hidden.)
4. In the new screen that displays, open the Schedule drop-down menu and select the Schedule for which you want to see User activity.

An Activity Log Report for the selected Schedule is displayed.

Note: Activity Log Reports show you the activities of both Site Users and Schedule-specific Users (defined in Settings section.)
For each activity listed in the Activity Log report, you can see:

- The date of the activity.
- The User associated with the activity.
- The parent page where the activity occurred.
- The page where the activity occurred.
- The type of activity that occurred.
- A description of the activity.

You can also double-click on any row of the report to open a text box that contains full details—like this:

At the bottom of the list, page controls allow you to adjust the number of items listed per page (Page Size), and select the page to display. In addition a Refresh feature can be used to refresh the Report page, if necessary.

**Sorting Activity Log Items**

By default, Activity Log items are sorted by Date, with the most recent items listed at the top. If you click on the Date column heading, the sort order by Date is reversed (i.e., the oldest items will move to the top of the list).

You can sort items by any column by clicking on the column heading. Clicking again on the same heading sorts by that column in the reverse order.
Generating a Billing Report

A Billing Report shows you—for each of the client Schedules associated with your site—the number of User activities that have occurred in selected areas of the application during a given time period.

You can choose to include Site User activities, Schedule-User activities, or both. And you can choose to see activities in all areas of the application (with the exception of Site Admin), or only selected areas.

Follow these steps to generate a Billing Report:

1. Select Site Admin from the Appointment Scheduler Navigation Menu.
2. In the Site Admin Menu Box, select the Reports heading to display Report options.

A screen like the following is displayed:

4. In the Time Range area, indicate the time range you’re interested in by specifying a Start and End date and time. (Click the icon to select dates. Click the icon to select times.)
5 Under the **User Types** heading (to the right), select **Site Users** or **Schedule Users**, or select **both** types, to indicate the Users for whom you want to see activity data.

6 Using the checkboxes, indicate the areas of the application that you want included in the Billing report.

   ALL items are checked by default, so you'll need to un-check the sections that you do NOT want to include in the report.

7 When you’re ready to generate the report, click **Generate Report**.

   The specified report is displayed.

```
<table>
<thead>
<tr>
<th>Account ID</th>
<th>Calendar</th>
<th>Address Book</th>
<th>Manage Appointments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000</td>
<td>10</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>1002</td>
<td>19</td>
<td>21</td>
<td>2</td>
</tr>
<tr>
<td>1004</td>
<td>17</td>
<td>9</td>
<td>4</td>
</tr>
<tr>
<td>1005</td>
<td>2</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>2000</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>3000</td>
<td>3</td>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>4000</td>
<td>2</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>5000</td>
<td>2</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>6000</td>
<td>3</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>6300</td>
<td>2</td>
<td>2</td>
<td>5</td>
</tr>
</tbody>
</table>
```

- Each **row** of the report represents a different client Schedule, as identified by the Account ID in the first column. (Ideally, this Account ID matches a Client Account Number in Client Maintenance.)
- Each **column** represents a different section of the Appointment Scheduler application.
- The numbers in the columns show you, for each section, how many changes were made to that section during the specified time period.

Notice the **Show Settings** link at the top of the report. If you click this link, you can display and, if necessary, change the settings controlling the Report contents.

You can also:
◆ Click ![Excel](image) to export the report contents to an Excel file.
◆ Click ![CSV](image) to export the report contents to a CSV (comma separated values) file.

➤ **NOTE:** If you like, you can use your browser’s Print feature to print the displayed report.
**SETTINGS**

The **Settings** section of the Appointment Scheduler allows you to configure different types of settings for the Schedules you have defined in the Site Admin section. For example, this is where you define Schedule-specific Roles, and Users, and where you define the appearance of Schedule-specific interface screens.

To access the Settings section, select **Settings** from the Appointment Scheduler Navigation Menu.

---

**Selecting a Schedule for the Settings Section:**

When the Settings page opens, you need to select the Schedule for which you want to define settings. To open the menu for selecting the Schedule, click **more ▼** in the upper-right corner of the screen.

Once you’ve selected the Schedule you’re interested in, you can define Schedule settings under four different Menu Box headings: **Schedule Information; Calendar Setup; Email Setup; and Address Book Setup.**

Refer to the following topics for complete information:

- **Settings > Schedule Information** *(page 49)*
- **Settings > Calendar Setup** *(page 60)*
- **Settings > Email Setup** *(page 66)*
- **Settings > Address Book Setup** *(page 71)*
Settings > Schedule Information

When the Schedule Information heading is open in the Settings screen Menu Box, four sub-categories are displayed: Contact Information; Appearance; Roles; and Users. Refer to the following topics for details on how to configure settings for each:

- Updating Contact Information for a Schedule (page 49)
- Configuring the Appearance for a Schedule (page 50)
- Configuring Roles for a Schedule (page 52)
- Configuring Users for a Schedule (page 57)

Updating Contact Information for a Schedule

When you first create a Schedule in the Site Admin section, you are required to enter information for a person identified as the Schedule’s primary Contact. Contact Information, under the Settings > Schedule Information heading, can be used to update this information, if necessary.

Follow these steps to update Contact Information for a Schedule:

1. Select Settings from the Appointment Scheduler Navigation Menu.
2. If it’s not already selected, select the appropriate Schedule by clicking more ▼ (upper-right corner), then choosing from the drop-down menu.
3. If the Schedule Information category in the Menu Box is not open, click on it to display Schedule Information sub-categories.
4. Select Contact Information.
A screen like the following opens. Contact information provided when the Schedule was created (in Site Settings) is shown in the displayed fields.

5 Edit or add information, as necessary.

6 When you’re finished, click Save to save and close.

Configuring the Appearance for a Schedule

Each Schedule defined in the Appointment Scheduler can have its own, customized “Appearance” in the user interface. By default, it will have the appearance defined in the “Appearance” sub-section of Site Admin (see page 25).

Follow these steps to customize the Appearance for a Schedule:

1 Select Settings from the Appointment Scheduler Navigation Menu.

2 If it’s not already selected, select the appropriate Schedule by clicking more (upper-right corner), then choosing from the drop-down menu.
3 If the **Schedule Information** category in the Menu Box is not open, click on it to display Schedule Information sub-categories.

4 Select **Appearance**.

A screen like the following opens:

5 If you want to replace the default logo with a Schedule-specific logo, use the **Choose** feature to select the path to the logo file. (The logo file should not exceed 50 KB, and can have any of the following file extensions: *jpeg, jpg, gif, png, bmp*.)

6 To choose the color scheme, or “skin,” for the Schedule, select from the **Skin** drop-down menu. (You will probably want to experiment with different options before making a final selection.)

7 When you’re finished, click **Save** to save.
The screen now appears with the selected Appearance settings.

Configuring Roles for a Schedule

Configuring Roles for a Schedule is like configuring Site User Roles, only these Roles will be assigned to client Users who are only able to access their own Schedules in the Appointment Scheduler application.

NOTE: In addition to defining Roles in the Settings section, you can also define Roles for Schedules using the Copy Roles to Schedules feature available in the Site Admin section. Since this may be the quickest way to define Schedule-specific Roles, Startel recommends you refer to "Copying a Role to Schedules" on page 34 before following the instructions below.

Follow these steps to configure a Role for a Schedule:

1. Select Settings from the Appointment Scheduler Navigation Menu.
2. If it’s not already selected, select the appropriate Schedule by clicking more (upper-right corner), then choosing from the drop-down menu.
3. If the Schedule Information category in the Menu Box is not open, click on it to display Schedule Information sub-categories.
4. Select Roles.

5. Click the Add new role button. The Add/Edit Role dialog box is displayed:

The look of the Step 5 "Add" feature will depend on the "skin" selected for the Schedule.

6. In the Role Name field, enter a name for the Role.

7. Configure this screen as described in the table that follows.

8. When you’re finished, click Save to save and close. The new Role will now appear at the bottom of the Roles list. (Roles are listed in the order created.)

Use the scrollbar on the right side of the screen to see the complete contents of the dialog box.
## Add/Edit Role Settings

<table>
<thead>
<tr>
<th>Setting</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role Name</td>
<td>Enter a descriptive name for the Role.</td>
</tr>
</tbody>
</table>
| Settings  | Under the **Settings** heading, use the checkboxes to select the Role's privileges (**View, Add, Edit, Delete**) in the Settings section of the Appointment Scheduler application.  
  ➢ **Note:** For all Role categories, you **must** select the **View** option before you can select additional privileges.  
  **Schedule Information**  
  • **Contact Information:** Available choices: **View; Edit**  
  • **Appearance:** Available choices: **View; Edit**  
  • **Roles:** Available choices: **View; Add; Edit; Delete**  
  • **Users:** Available choices: **View; Add; Edit; Delete**  
  **Calendar Setup**  
  • **Calendar Settings:** Available choices: **View; Edit**  
  • **Appointment Types:** Available choices: **View; Add; Edit; Delete**  
  **Email Setup**  
  • **Confirmation Settings:** Available choices: **View; Edit**  
  • **Reminder Settings:** Available choices: **View; Edit**  
  • **Email Formats:** Available choices: **View; Edit**  
  **Address Book Setup**  
  • **Custom Fields:** Available choices: **View; Add; Edit; Delete**  
| Providers | Under the **Providers** heading, use the checkboxes to select the Role's privileges (**View, Add, Edit, Delete**) in the Providers section of the Appointment Scheduler application.  
  **Provider Information**  
  • **Contact Information:** Available choices: **View; Add; Edit; Delete**  
  **Provider Setup**  
  • **Work Days:** Available choices: **View; Add; Edit; Delete**  
  • **Appointment Types:** Available choices: **View; Add; Edit; Delete** |
<table>
<thead>
<tr>
<th>Setting</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar</td>
<td>Under the Calendar heading, configure settings as follows to define the Role’s privileges in the Calendar section of the Appointment Scheduler application.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Calendar Allow Availability Override</strong>: Select Yes or No to indicate whether the Role should allow a User to schedule an appointment in a time slot that shows no availability.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Calendar Appointment Type Override</strong>: Select Yes or No to indicate whether the Role should allow a User to override defined Appointment Type durations when scheduling appointments. (See page 65 for more on Appointment durations.)</td>
</tr>
<tr>
<td></td>
<td>• <strong>Calendar Appointments</strong>: Select checkboxes to define standard privileges for the Calendar section of the application. Available choices: View; Add; Edit; Delete.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Calendar Block Out</strong>: Select checkboxes to define privileges for the Calendar “Block Out” feature (see page 92). Available choices: View; Add; Edit; Delete.</td>
</tr>
<tr>
<td></td>
<td>• For <strong>Calendar Recurrence</strong>: Select Yes or No to indicate whether the Role should authorize a User to schedule Recurring Appointments in the Calendar. (No is selected by default.)</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: It is not possible to schedule Recurring Appointments in the Manage Appointments section. The Recurring Appointments feature is currently available in the Calendar only. If a Recurring Appointment is defined in the Calendar, the multiple resulting appointments do appear in the Manage Appointments section—however, they are “view only.”</td>
</tr>
<tr>
<td>Address Book</td>
<td>Under the Address Book heading, configure settings as follows to define the Role’s privileges in the Address Book section of the Appointment Scheduler application.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Address Book Entry</strong>: Select checkboxes to define standard privileges for the Address Book section of the application. Available choices: View; Add; Edit; Delete.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Address Book Export</strong>: Select Yes or No to indicate whether the Role should allow a User to export attendee data from the Address Book.</td>
</tr>
</tbody>
</table>

---

55
Using the Appointment Scheduler

Editing, Copying, and Deleting Roles

Once you have added a Role to a Schedule, as described above, you can do the following in the Roles list screen:

- Click the [+] icon to add another Role.
- Click the [pencil] icon to edit the Role.
- Click the [folder] icon to copy the Role.
- Click the [X] icon to delete the Role.

➤ NOTE: See page 34 for details on how to copy Site Admin Roles to Schedules.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Instruction</th>
</tr>
</thead>
</table>
| Manage Appointments | Under the **Manage Appointments** heading, configure settings as follows to define the Role’s privileges in the Manage Appointments section of the Appointment Scheduler application.  
  • **Appointment Export:** Select **Yes** or **No** to indicate if the Role should allow a User to use the “Export To Excel” function to export Appointment data to an Excel file.  
  • **Manage Appointments:** Select checkboxes to define standard privileges for managing appointments in the Managing Appointments section of the Appointment Scheduler application. Available choices: View; Add; Edit; Delete. **Note:** To enable appointment scheduling, you’ll need to both enable these options and select the **Yes** option for the **Scheduling** setting (described below).  
  • **Schedule Allow Availability Override:** Select **Yes** or **No** to indicate whether the Role should allow a User to schedule an appointment in a time slot that shows no availability.  
  • **Scheduling:** Select **Yes** or **No** to indicate whether the Role should allow the User to schedule appointments. **Note:** To enable appointment scheduling, you’ll need to both select **Yes** for this setting and enable Manage Appointments options (described above). |
Configuring Users for a Schedule

Configuring Users for a Schedule is like configuring Site Users, only these Users will be clients, not agents or staff, and they will only be able to access their own Schedules in the Appointment Scheduler application.

Follow these steps to configure Users for a Schedule:

1. Select Settings from the Appointment Scheduler Navigation Menu.
2. If it’s not already selected, select the appropriate Schedule by clicking more ▼ (upper-right corner), then choosing from the drop-down menu.
3. If the Schedule Information category in the Menu Box is not open, click on it to display Schedule Information sub-categories.
4. Select Users.

A screen like the following is displayed. If Users have already been defined, they are listed here.

![Users Screen](image)

- **NOTE:** The look of screens and features that display in your interface will depend on the “skin” assigned to the selected Schedule. Sample screens in this section represent the Sunset option.

5. Click Add new user.
The Add/Edit User dialog box opens.

6 In the **User Name** field, enter the value that the User will need to type into the Username field in the Appointment Scheduler Login screen. **And note:** Since the Appointment Scheduler is a Startel-hosted application, ALL User Names across ALL Schedules and ALL sites must be unique. If you attempt to define a User Name that is not unique, an error will be reported when you attempt to Save.

7 Fill in the **First Name** and **Last Name** fields with the User’s first and last names. (See margin text.)

8 Specify an email address for the User.

9 Under the Password heading, enter, then confirm a password for the User Account. (Passwords are case sensitive, and must contain a minimum of 6 characters—including at least 1 capital letter, and 1 lower case letter.)

   ➢ **NOTE:** As you enter your Password and Password Confirmation, you’ll be alerted if your password is too short, or if the two entries don’t match.
10 In the Roles area, specify the Role (or Roles) appropriate for this User by dragging from the Available Roles box to the User’s Roles box. (If you select more than one Role, the combined Role privileges will be available to the User.)

➢ NOTE: You can also select a Role by highlighting the Role name in the Available Roles box, then clicking the arrow to move it to the User’s Roles box. To select ALL Roles, click.

11 Notice the Active Status indicator at the top-right of the screen. If you don’t want this User Account to be active at this time, click the “Active” indicator to replace it with Disabled.

12 Click Save to save and close.

The new User is now added to the Users List.

➢ NOTE: When a User Account is “active,” the Online and Locked Out columns will show you if the User is presently logged in or “locked out” of the application. A User will be locked out of the Appointment Scheduler application if he/she enters the wrong password five times while attempting to log in. If a User gets locked out, an administrator will need to “unlock” the User Account by un-checking the Locked Out checkbox associated with the account.
Editing, Copying, and Deleting Users

Once you have defined a User for a Schedule, you can do the following in the User list screen:

◆ Click \[\text{Add new user}\] to add another User.
◆ Click the \[\text{Edit user}\] icon to edit User settings.
◆ Click the \[\text{Delete user}\] icon to delete the User.

Settings > Calendar Setup

When the Calendar Setup heading is open in the Settings screen Menu Box, two sub-categories are displayed: Calendar Settings and Appointment Types.

Refer to the following topics for details on how to configure settings for each:

◆ Configuring Calendar Settings (page 60)
◆ Configuring Appointment Types (page 64)

Configuring Calendar Settings

You use Calendar Settings to define the Calendar that will be used for a selected Schedule.

By configuring Calendar settings, you define such things as which Days and Times will be shown on the Calendar, whether Recurring Appointments are supported by the Calendar, and the size of Calendar time increments.

Follow these steps to configure Calendar Settings for a Schedule:

1 Select Settings from the Appointment Scheduler Navigation Menu.
2 If it’s not already selected, select the appropriate Schedule by clicking more ▼ (upper-right corner), then choosing from the drop-down menu.
3 If the Calendar Setup category in the Menu Box is not open, click on it to display Calendar Setup sub-categories.
4 Select Calendar Settings.
A screen like the following is displayed:

- **NOTE:** The look of the screens that display in your interface will depend on the “skin” assigned to the selected Schedule.

5 Configure settings as described in the following table.

6 When you’re finished, click **Save** to save.

**Calendar Settings**

<table>
<thead>
<tr>
<th>Setting</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Zone</td>
<td>Open the <strong>Time Zone</strong> drop-down menu and select the Time Zone that applies to the Calendar. Also, select the <strong>Adjust for DST</strong> checkbox if the selected Time Zone uses Daylight Savings Time.</td>
</tr>
<tr>
<td>Setting</td>
<td>Instruction</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Start Week On</td>
<td>Use these settings to indicate the week days that should be shown on the Calendar (e.g., Monday thru Friday; Sunday thru Saturday, etc.).</td>
</tr>
<tr>
<td>End Week On</td>
<td></td>
</tr>
<tr>
<td>Start Day At</td>
<td>Configure these settings to specify the time range that you want displayed on the Calendar. (The calendar will NOT show times outside the designated range.)</td>
</tr>
<tr>
<td>End Day At</td>
<td>To specify times, click the icons to open a “Time Picker” pop-up box.</td>
</tr>
<tr>
<td>Start Work Day At</td>
<td>Fill in the Start Work Day At and End Work Day At fields to specify the time range for which it’s OK to schedule appointments.</td>
</tr>
<tr>
<td>End Work Day At</td>
<td>To specify times, click the icons to open a “Time Picker” pop-up box.</td>
</tr>
<tr>
<td></td>
<td>Note: The End time should indicate the latest time that a scheduled appointment can end.</td>
</tr>
<tr>
<td>Recurrence</td>
<td>The Recurrence setting controls whether Recurring Appointments can be scheduled in the Calendar.</td>
</tr>
<tr>
<td></td>
<td>By default, Recurring Appointments are turned OFF, as indicated by an associated button.</td>
</tr>
<tr>
<td></td>
<td>• To enable Recurring Appointments, click the button. An button will now display to show that the feature is turned ON.</td>
</tr>
<tr>
<td></td>
<td>• To disable Recurring Appointments, click .</td>
</tr>
<tr>
<td></td>
<td>The button will now return, telling you that the feature is turned OFF.</td>
</tr>
<tr>
<td></td>
<td>Note: Recurring Appointments can only be scheduled in the Calendar section. The Manage Appointments section does not currently support this feature.</td>
</tr>
<tr>
<td></td>
<td>Recurring Appointments scheduled in the Calendar do appear in Manage Appointments, but they are “view only.”</td>
</tr>
<tr>
<td>Setting</td>
<td>Instruction</td>
</tr>
<tr>
<td>-------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Exact Time Rendering    | **Exact Time Rendering** setting controls how appointments are shown in the Calendar.  
|                         | • When the feature is turned OFF, scheduled appointments appear in the Calendar in a slot whose height is sufficient to display the Appointment Subject and attendee(s).  
|                         | • When the feature is turned ON, scheduled appointments appear in the Calendar in a slot whose height is consistent with the allotted time. (For example, if the Calendar is divided into 60 minute increments, a 20 minute appointment would inhabit 1/3 of a 60 minute slot.)  
|                         | By default, the Exact Time Rendering feature is turned OFF, as indicated by an associated button.  
|                         | • To enable **Exact Time Rendering**, click the button. An button will now display to show that the feature is turned ON.  
|                         | • To disable **Exact Time Rendering**, click . The button will return, indicating that the feature is turned OFF.  
| Time Interval           | For the **Time Interval** setting, adjust the pointer on the Time Bar to indicate the time increments you want available in the Calendar for appointment scheduling.  
|                         | By default, it’s set for scheduling at 15-minute intervals. |
Configuring Appointment Types

The Calendar Settings **Appointment Types** feature allows you to define various Appointment Types for a Schedule’s Calendar. Appointment Types are especially useful for organizations that repeatedly schedule standard appointments for the same time period. (For example, 30 minute Chiropractic Sessions, or 1 hour Acupuncture Treatments.)

**Follow these steps to define Appointment Types for a Calendar:**

1. Select **Settings** from the Appointment Scheduler Navigation Menu.
2. If it’s not already selected, select the appropriate Schedule by clicking **more ▾** (upper-right corner), then choosing from the drop-down menu.
3. If the **Calendar Setup** category in the Menu Box is not open, click on it to display Calendar Setup sub-categories.
4. Select **Appointment Types**.
   A screen like the following is displayed:

   ![Appointment Types Screen]

   Use the **edit** and **delete** icons in this screen to edit or delete defined Appointment Types, if necessary.

   Notice that this sample screen contains some already-added Appointment Types. The first is a 1-hour **Initial Visit**, and the second is a 30-minute **Test Review**.

5. Click **Add new appointment type**.
The following pop-up is displayed:

6 Configure settings as described in the following table.
7 When you’re finished, click **Save** to save and close.

**Add/Edit Appointment Type Settings**

<table>
<thead>
<tr>
<th>Setting</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter a name for the Appointment Type.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a text description for the Appointment Type. (This is optional.)</td>
</tr>
<tr>
<td>Color</td>
<td>If you want appointments of this type to appear in a particular color, open the <strong>Color</strong> drop-down menu and select a color. If you leave this field blank, the Appointment Type will be shown in a default color determined by the selected Schedule “Appearance.”</td>
</tr>
<tr>
<td>Duration</td>
<td>Use one or more of these fields—<strong>Days, Hours, Minutes</strong>—to indicate the duration for this Appointment Type (e.g., 1 Hour, 1/2 hour, 15 Minutes, etc.). Note: You can fill in a field by typing, or by using an up or down arrow to scroll to the desired value.</td>
</tr>
<tr>
<td>Limits</td>
<td>Use the <strong>Max Per Day</strong> and <strong>Max Concurrent</strong> settings in this area to indicate if there is a maximum number of this type of appointment that should be scheduled <strong>per day</strong>, and/or <strong>concurrently per day</strong>. Appointments are considered <strong>concurrent</strong> if there is any overlapping of scheduled time. Note: You can fill in a field by typing, or by using an up or down arrow to scroll to the desired value.</td>
</tr>
<tr>
<td>Staff Only</td>
<td>Select this checkbox if only Schedule Users (and not Site Users) should be able to schedule this type of appointment.</td>
</tr>
</tbody>
</table>
Settings > Email Setup

When the Email Setup heading is open in the Settings screen, three sub-categories are displayed: Confirmation Settings; Reminder Settings; and Email Formats.

Refer to the following topics for details on how to configure settings for each:

- Configuring Confirmation Settings (page 66)
- Configuring Reminders (page 68)
- Configuring Email Formats (page 69)

Configuring Confirmation Settings

The Email Setup Confirmation Settings feature allows you to define various Appointment Confirmation preferences for the selected Schedule.

Appointment Confirmations are email messages that are generated when appointments are created, updated, or cancelled.

Follow these steps to define Email Setup Confirmation Settings:

1. Select Settings from the Appointment Scheduler Navigation Menu.
2. If it’s not already selected, select the appropriate Schedule by clicking more ▼ (upper-right corner), then choosing from the drop-down menu.
3. If the Email Setup category in the Menu Box is not open, click on it to display Email Setup sub-categories.
4. Select Confirmation Settings.
A screen like the following is displayed:

5 Select the checkboxes that describe how, and to whom, Appointment Confirmations should be delivered for this Schedule. Options include:

- **Send as iCalendar Event**: This option sends Appointment Confirmations as iCalendar events. (iCalendar events can be imported into Outlook.)
- **Send Appointment Confirmation to the Provider of the Appointment**: This option sends Appointment Confirmations to the email address of the Appointment Provider.
- **Send Appointment Confirmation to Attendee(s) of the Appointment**: This option sends Appointment Confirmations to the email address of each Appointment Attendee.
- **Copy Confirmation to additional email addresses (Separate each address with a semicolon)**: This option allows you to copy Appointment Confirmation messages to one or more additional email addresses. To specify email addresses, enter them into the associated input field, separated by semicolons.

6 When you’re finished, click **Save** to save.
Configuring Reminders

The Email Setup Reminder Settings feature allows you to configure Appointment Reminders for Providers and Attendees associated with the selected Schedule.

Follow these steps to configure Appointment Reminders for a Schedule:

1. Select Settings from the Appointment Scheduler Navigation Menu.

2. If it's not already selected, select the appropriate Schedule by clicking more ▼ (upper-right corner), then choosing from the drop-down menu.

3. If the Email Setup category in the Menu Box is not open, click on it to display Email Setup sub-categories.

4. Select Reminder Settings.

A screen like the following is displayed:

5. Select one or both checkboxes in this screen to specify if you want Appointment Reminders to be sent to Providers, Attendees, or both. (By default, neither is checked.)

> NOTE: Reminder messages are sent to the email addresses specified for Providers and Attendees in the Appointment Scheduler Providers and Address Book sections, respectively.
6 In the **Reminder Time** field, enter the *time* that Reminder messages should be delivered. To specify the time, click the 🕒 icon and select from the “Time Picker” pop-up box.

7 In the **Days Prior** field, enter the number of days prior to the appointment that Reminder emails should be sent. **1** is entered by default.

8 When you're finished, click **Save** to save.

### Configuring Email Formats

The Email Setup **Email Formats** feature allows you to customize the formats that will be used for Confirmation and Reminder emails that are sent out for the selected Schedule.

Email Message Types that you can format include:

- Appointment Created
- Appointment Updated
- Appointment Cancelled
- Appointment Reminder

> **NOTE:** You are NOT required to use this feature. Each of these message types has a pre-defined default format.

**Follow these steps to customize an Email Format for a Schedule:**

1 Select **Settings** from the Appointment Scheduler Navigation Menu.

2 If it's not already selected, select the appropriate Schedule by clicking **more ▾** (upper-right corner), then choosing from the drop-down menu.

3 If the **Email Setup** category in the Menu Box is not open, click on it to display **Email Setup** sub-categories.

4 Select **Email Formats**.

A screen like the following is displayed.

The default format that applies to the current Email Type selection is shown at the lower portion of the screen.
5 Open the Email Type drop-down menu and select the email type you want to format (Appointment Created, Appointment Updated, Appointment Cancelled, or Appointment Reminder).

6 The entry in the Email Subject field shows you what will be used, by default, as the Subject for the selected Email Type. You can enter different Subject text, if you like, and it can include any of the variables described below. (For example, Appointment with @Provider.)

Notice the default message text in the lower part of the screen. The text string that appears after each of the @ (“at”) signs represents a variable. When emails are sent, variables are replaced with values pulled from the Calendar.

The variables that can be used in a message can be selected from the menu highlighted in the sample screen, and they work like this:

- @Subject is replaced in the email with the Appointment Subject.
- @StartTime is replaced in the email with the Appointment Start Time.
- @EndTime is replaced in the email with the Appointment End Time.
- @Provider is replaced in the email with the Appointment Provider.
- @ApptType is replaced in the email with the Appointment Type.
- @AttendeeList is replaced in the email with the Appointment Attendee(s).
- @AttendeeListWithAddress is replaced in the email with the Appointment Attendee(s) and their address(es.)
- @Description is replaced in the email with the Appointment Description.
Using the variables and standard Editing/Formatting tools available in this screen, design the message that you want delivered for the selected Email type.

When you’re finished, click **Save** to save.

**Settings > Address Book Setup**

When the **Address Book** heading is open in the Settings screen Menu Box, a single **Custom Fields** sub-category is displayed. Refer to the topic that follows for details on how to configure custom fields for a Schedule Address Book.

**Configuring Custom Fields for an Address Book**

The **Custom Fields** option under the Settings > Address Book heading can be used to add custom fields to the Address Book for the selected Schedule. The Address Book (described under the “Address Book” topic on page 95) is where you add Contact Information for Appointment “Attendees.”

Here’s a sample Address Book to which Custom Fields have been added:
Follow these steps to add a Custom Field to a Schedule’s Address Book:

1. Select Settings from the Appointment Scheduler Navigation Menu.
2. If it’s not already selected, select the appropriate Schedule by clicking more ▼ (upper-right corner), then choosing from the drop-down menu.
3. If the Address Book Setup category in the Menu Box is not open, click on it.
4. Select Custom Fields.
   
   A screen like the following is displayed. If Custom Fields have already been defined for the Address Book, they are listed, as shown below.

![Custom Fields Screen](image)

5. Click ![Add new custom field](image).

   A dialog box like the following is displayed:
6 Configure settings as described in the following table.

7 When you’re finished, click **Save** to save and close.

### Add/Edit Custom Fields

<table>
<thead>
<tr>
<th>Setting</th>
<th>Instruction</th>
</tr>
</thead>
</table>
| **Value Name** | Enter a name (containing NO spaces) for the value that will be supplied for the Custom Field.  
➢ **Note:** To later reference the Custom Field value with a variable, you would simply need to precede the Value Name with the @ sign. For example, @**Gender** would be the variable associated with a Value Name specified as **Gender**. |
| **Label Text** | Enter the text label that should appear for this Custom Field in the Address Book Add/Edit screen. For example, **Patient Gender**.  
This can, but is not required to, match the value entered for **Value Name**. |
| **Ordinal** | Enter a number to specify the order in which you want this Custom Field to appear (under the “Custom Fields” heading) in the Address Book Add/Edit screen.  
For example, enter 1 if you want it to appear first, 2 if you want it to appear second, and so on. |
| **Field Type** | Open the drop-down menu and select the type of field that should be used for this Custom Value in the Address Book Add/Edit screen.  
Options are:  
• Text Box  
• Multi-Line Text Box  
➢ **Note:** Text Box is selected by default. If you select Multi-Line Text Box, the Max Length field is replaced with a **Height** field. |
| **Width (px)** | Enter a value to determine the width of the field, in pixels.  
**200** is entered by default. |
<table>
<thead>
<tr>
<th>Setting</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Max Length/Height</td>
<td>The field label that appears here depends on the Field Type option you selected. Max Length is displayed if you selected Text Box. Height is displayed if you selected Multi-Line Text Box. For Max Length, enter a value to determine the maximum number of characters that can be entered into the Text Box. 200 is entered by default. For Height, enter the height of the Multi-Line Text Box, in pixels. 50 is entered by default (see note). Note: The number of characters that will be accepted into a Multi-Line Text box is NOT limited by Width and Height values. If text exceeds the size of the field, a scroll feature is added to the field.</td>
</tr>
<tr>
<td>Not Required</td>
<td>By default, the Not Required button is shown at the bottom of the screen, indicating that the Custom Field you are defining is NOT a Required field. If you want to make the field Required, click the Not Required button. A Required button appears when the field has been designated as Required.</td>
</tr>
<tr>
<td>Not Encrypted</td>
<td>By default, the Not Encrypted button is shown at the bottom of the screen, indicating that the Custom Field you are defining is NOT an Encrypted field. When a field is designated as Encrypted, the information will be stored encrypted in the database. If you want to make the field an Encrypted field, click the Not Encrypted button. An Encrypted button appears when the field has been designated as Encrypted. Note: Once a Custom Field has been saved as Encrypted or Not Encrypted, this designation cannot be changed. If you want to change it, you'll need to delete the Custom Field and add it again.</td>
</tr>
<tr>
<td>Not Emailed</td>
<td>By default, the Not Emailed button is shown, indicating that the Custom Field you are defining should NOT be readable into an email (this would be accomplished using a variable). If you want to enable the field for emailing, click the Not Emailed button. An Emailed button appears when the field has been enabled for emailing.</td>
</tr>
</tbody>
</table>
PROVIDERS

The Providers section of the Appointment Scheduler interface is where Provider information is entered for each defined Schedule.

Providers are the Schedule-specific professionals or resources that can be scheduled to provide services for a given client/organization.

To access the Providers section of the application, select Providers from the Appointment Scheduler Navigation Menu.

Selecting a Schedule for the Providers Section:

When the Providers page opens, you need to select the Schedule for which you want to add or edit Provider information. To open the menu for selecting the Schedule, click more ▼ in the upper-right corner of the screen.

Once you’ve selected the Schedule you’re interested in, you can define Provider settings under two different Menu Box headings: Provider Information and Provider Setup.

Refer to the following topics for complete information:

◆ Providers > Provider Information (page 76)
◆ Providers > Provider Setup (page 80)
Providers > Provider Information

When you select Providers from the Appointment Scheduler Navigation Menu, the Provider Information heading in the Menu Box is open by default, displaying a single Provider Information option: Contact Information.

The Contact Information screen that displays for this option is where you initially define basic Contact Information for a Provider.

See the topic that follows for complete information.

Entering Contact Information for a Provider

The first step for defining a Provider is entering basic Contact Information for the Provider.

Follow these steps to enter Contact Information for a Provider:

1. Select Providers from the Appointment Scheduler Navigation Menu.

2. If it's not already selected, select the appropriate Schedule by clicking more (upper-right corner), then choosing from the drop-down menu.

   In the screen that displays, the Provider Information heading is open by default in the Menu Box.

3. Select (click on) Contact Information.

   The Contact Information screen is displayed.
Notice the **Provider** field in this screen. When one or more Providers have already been defined for the selected Schedule, you can select from a **Provider** drop-down menu to open and edit Provider information, if necessary.

4. Click **New Provider**.
An Add Provider dialog box pops up:

5 Fill in this dialog box with Contact Information for the Provider you’re adding. Required fields are marked with red stars. All other fields are optional.

➢ NOTE: A Provider need not be a person. It can be anything that one can schedule, like a conference room, a vehicle, a horse.... So it’s fine to fill in the First Name and Last Name fields with values like Conference Room, or Toyota Minivan. The important thing is that you enter values that clearly identify the “Provider” you are adding.

6 When you’re finished, click Save to save and close.

The information you added is now displayed in the main Provider > Contact Information screen.
Deleting a Provider

The button that appears in this and other Providers screens can be used, if necessary, to delete a selected Provider. (Providers are selected using the Provider drop-down menu.)

If you delete a Provider for which future appointments have been scheduled, a warning message appears to inform you that deleting the Provider will delete all the appointments scheduled for the Provider.

You can then click Continue with delete to delete the Provider and associated appointments, or Cancel to cancel the deletion.
Providers > Provider Setup

When the Provider Setup heading is open in the Settings screen Menu Box, two sub-categories are displayed: Work Days and Appointment Types. Refer to the following topics for details on how to configure settings for each:

- Configuring Provider Work Days (page 80)
- Configuring Provider Appointment Types (page 84)

Configuring Provider Work Days

You use the Work Days sub-category under the Provider > Provider Setup heading to define the Days and Hours that a Provider is available for scheduling.

Follow these steps for EACH day that a Provider is available for scheduling:

1. Select Providers from the Appointment Scheduler Navigation Menu.
2. If it’s not already selected, select the appropriate Schedule by clicking more ▼ (upper-right corner), then choosing from the drop-down menu.
3. Click the Provider Setup category in the Menu Box.
4. Select Work Days.

The Work Days screen is displayed. If any Work Days have already been defined for the Provider, they are listed in the screen, as shown below.

---

Startel Appointment Scheduler User’s Guide  
Using the Appointment Scheduler
NOTES

- See "Deleting a Provider" on page 79 for details on the Delete Provider feature that appears in this screen.

- You can use the Edit Work Day and Delete Work Day features in this screen to edit or delete a listed Work Day, if necessary.

- The Copy Work Day feature in the Work Days screen is useful if you want to quickly define a new Work Day that is similar or identical to another Work Day. Simply click the Copy icon for the Work Day that you want to copy, then, when the dialog box opens (containing parameters for the associated day), edit, if necessary, and Save under a new Work Day name.

5 Select from the Provider drop-down menu to indicate the Provider for which you want to define a Work Day.

6 Click Add new work day.
The Add/Edit Work Day dialog box opens.

**Add/Edit Work Day**

<table>
<thead>
<tr>
<th>Day</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Work Day</strong></td>
<td>Under the Day heading, open the Work Day drop-down menu and select the day of the week for which you want to configure Provider “Work Day” settings.</td>
</tr>
</tbody>
</table>

**NOTE:** The specific Days and Times that can be selected in this screen are controlled by Calendar Settings configured for the Schedule in the Settings section. (See “Configuring Calendar Settings” on page 60).

7 Configure settings as described in the following table.

8 When you’re finished, click Save to save and close.

### Add/Edit Provider Work Day Settings

<table>
<thead>
<tr>
<th>Setting</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day</td>
<td>Under the Day heading, open the Work Day drop-down menu and select the day of the week for which you want to configure Provider “Work Day” settings.</td>
</tr>
</tbody>
</table>

**Note:** The days available on this menu are controlled by the Start Week On and End Week On Calendar settings configured for the selected Schedule (see page 62). This means, for example, that if Calendar settings define a Work Week as Monday thru Friday, Saturday and Sunday will NOT appear on a Provider’s Work Day menu.
### Setting | Instruction
--- | ---
**Work Time** | Under the **Work Time** heading, enter values in the **Start Day At** and **End Day At** fields to specify the Provider’s work hours for the selected Day. **And note:**
- The **Start Day At** time will be the earliest time that the Provider will be available for an appointment—UNLESS otherwise specified in the **Disabled Start Times** section. (See "Disabled Start Times", on page 83.)
- The **End Day At** time will be the latest time that the Provider’s last appointment can end.
To specify times, click the icons to open a “Time Picker” pop-up box.

**Lunch Time** | Select the **Disable Lunch** checkbox if it is NOT necessary to set aside a Lunch period during which the Provider should not be scheduled.
- When **Disable Lunch** is selected, the associated Time settings are disabled (since they are not relevant).
- When **Disable Lunch** is NOT selected, use the **Start Lunch At** and **End Lunch At** fields to indicate the time period during which the Provider cannot be scheduled.
To specify times, click the icons to open a “Time Picker” pop-up box.

- **Note:** Providers can be scheduled for lunch appointments by Users with Calendar “Availability Override” privileges. See page 32 and page 55 for details on “Availability Override” settings for Site Users and Schedule-specific Users.

**Appointment Limits** | Under the **Appointment Limits** heading, use the following settings to set Provider Appointment Limits for the selected Work Day.
- **Max:** Enter a number to indicate the maximum number of appointments that can be scheduled for the Provider on the selected Work Day. (1 is selected by default.)
- **Max Concurrent:** Enter a number to indicate the maximum number of *concurrent* appointments that can be scheduled for the Provider on the selected Work Day. (1 is selected by default.)

- **Note:** Appointments are considered *concurrent* if there is *any* overlapping of scheduled time.

**Disabled Start Times** | If there are any times that should NOT be selected as appointment Start Times for the selected Provider, select the times from the Time options listed in this section.

- **Notes:**
  - The Times that you can choose from are controlled by the **Time Interval** setting (described on page 63) that was configured for the Schedule in the Settings section.
  - This feature is useful for ensuring that appointments have specific time slots (e.g., 8:00 am - 10:00 am, 1:00 pm - 3:00 pm, etc.).
Configuring Provider Appointment Types

You use the Appointment Types sub-category under the Provider > Provider Setup heading to define the Appointment Types available for a Provider.

Follow these steps for EACH Appointment Type that should be available for a Provider.

1. Select Providers from the Appointment Scheduler Navigation Menu.
2. If it’s not already selected, select the appropriate Schedule by clicking more ▼ (upper-right corner), then choosing from the drop-down menu.
3. Click the Provider Setup category in the Menu Box.
4. Select Appointment Types.

The Appointment Types screen is displayed. If any Appointment Types have already been defined for the Provider, they are listed in the screen, as shown below.

NOTES

➤ To edit or delete any listed Appointment Type, use the ♯ or ✗ feature associated with the item.

➤ See “Deleting a Provider” on page 79 for details on the Delete Provider feature available in this screen.
5 Select from the **Provider** drop-down menu to indicate the Provider for which you want to define an Appointment Type.

6 Click **Add new appointment type**. The Add/Edit Appointment Type dialog box opens.

![Add/Edit Appointment Type dialog box]

- **NOTE:** The **Appointment Types** that can be selected for a **Provider** in this dialog box, and the **Default** values that are provided for **Duration** and **Limits** values, are controlled by Appointment Types settings configured for the Schedule in the Settings section. (See "Configuring Appointment Types" on page 64).

7 Configure settings as described in the following table.

8 When you’re finished, click **Save** to save and close.

### Add/Edit Provider Appointment Type Settings

<table>
<thead>
<tr>
<th>Setting</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment Type</td>
<td>Open the <strong>Appt Type</strong> drop-down menu and select the Appointment Type that you want to be available for the selected Provider.  &lt;br&gt;    ➤ <strong>Note:</strong> Menu choices are controlled by the Appointment Type settings configured for the Schedule in the Settings section. (See page 65).</td>
</tr>
<tr>
<td>Duration</td>
<td>Use one or more of these fields—<strong>Days</strong>, <strong>Hours</strong>, <strong>Minutes</strong>—to indicate the duration for this Appointment Type (e.g., 30 Minutes, 1 Hour, etc.).  &lt;br&gt;    Notice that <strong>Default</strong> appears automatically for each of the displayed fields. If you leave a Default setting, the assignment for that Day, Hour, or Minute will be the value that was set for the Appointment Type in the Settings section. (See page 65).</td>
</tr>
<tr>
<td>Setting</td>
<td>Instruction</td>
</tr>
<tr>
<td>---------</td>
<td>-------------</td>
</tr>
<tr>
<td>Limits</td>
<td>Use the <strong>Max Per Day</strong> and <strong>Max Concurrent</strong> settings in this area to indicate if there is a maximum number of <em>this type of appointment</em> that should be scheduled per day, and/or concurrently. (Appointments are considered concurrent if there is any overlapping of scheduled time.) Notice that <strong>Default</strong> appears automatically for each of the displayed fields. If you leave the Default setting, the assignment for that parameter will be the value that was set for the Appointment Type in the Settings section. (See page 65).</td>
</tr>
</tbody>
</table>


Before appointments can be scheduled, it’s necessary to perform set-up procedures in the Settings and Providers sections of the application.

The Calendar section of the Appointment Scheduler interface gives you a Calendar view of the selected Schedule, and allows a qualified User to add new appointments to the Calendar using a convenient “drag and drop” method.

To access this section, select Calendar from the Appointment Scheduler Navigation Menu. If appointments have already been scheduled for the displayed times, they appear on the Calendar, as shown below.

Note: If you hover your mouse pointer over an appointment on the Calendar, appointment details pop up. In addition, a icon appears over the appointment. Clicking this icon cancels the appointment, and removes it from the calendar.

If the desired Schedule is not selected when you open the screen, choose the one you want by clicking more ▼, then selecting from the drop-down list. (The list will only include Schedules that your User account authorizes you to access.)

From the Calendar screen, you can add, view, edit, and delete appointments.

You can also block out time periods as not available for scheduling, switch the Calendar view between Day, Week, and Month; move the Calendar backward or forward in time; select the Providers and Appointment Types that you want represented in the Calendar; and select the day for which you want to see appointments (the current date is selected by default).
To Add a new appointment to the Calendar: Drag the Appointment Type for the desired Provider to the appropriate Calendar slot. (See page 88 for more detailed instructions.)

To Block Out time periods as unavailable for scheduling: Use your mouse to select an area in the Calendar, then right-click and select from the pop up “Block Out” menu. (See page 92 for more information.)

To View or Edit an existing appointment: Double-click the desired appointment in the Calendar, make changes in the Edit Appointment screen, if necessary, then click Save (or Cancel). Note: Clicking Cancel in the Edit screen does not Cancel the appointment; it only cancels changes you may have made to the appointment.

To Cancel an existing appointment: Do one of the following:
- Right-click the desired appointment and select Cancel from the pop-up menu. When prompted to confirm, click OK.
- Hover your mouse pointer over the appointment, then click the ✗ icon that appears. When prompted to confirm, click OK.

To switch between Day, Week, and Month view: Click Day, Week, or Month at the top-right of the Calendar. (Week is selected by default.)

To move the Calendar page backward or forward: Use the backward or forward arrows at the top of the displayed Calendars, or select a day in one of the Calendars on the left side of the page.

To specify the Provider(s) and Appointment Type(s) for which you want to see appointments: Select or de-select checkboxes under the Providers heading. By default, all Providers and all Appointment Types are selected.

Scheduling an Appointment in Calendar

Appointments can be scheduled in the Calendar section using drag-and-drop.

Follow these steps to schedule a new appointment in the Calendar section:

1. Select Calendar from the Appointment Scheduler Navigation Menu.
   The Calendar screen is displayed, with the current Week represented, by default.

2. If it’s not already selected, select the Schedule for which you want to schedule an appointment by clicking more ▼ (upper-right corner), then choosing from the drop-down menu.

3. If necessary, use controls described above to display a different Calendar view (Month view, for example) and the day for which you want to schedule an appointment.
This sample screen has been switched to Month view.

4 Locate the desired Provider and Appointment Type on the left side of the screen, then drag the Appointment Type and drop it into the desired Calendar time slot.

➢ **TIP:** If a Calendar is crowded with appointments, you may want to hide some Provider’s appointments before dragging an appointment to the Calendar. To hide a Provider’s appointments, simply un-check the Provider’s name under the Providers heading. To hide only certain types of appointments associated with a Provider, un-check the appointment types under the Provider’s name.
If the time slot is available for the Provider (you are alerted if it’s not), a dialog box like the following is displayed:

In the Attendee(s) area, begin typing the last name of the appointment “Attendee.”

One of two things will happen:

- **If the name you’re typing is recognized as a Contact** (that is, if the name is in the Schedule’s Address Book), that name will pop up for selection. Select it to enter it into the Attendee field. (You must type at least 3 characters for a name to be recognized.)

- **If the name you’re typing is NOT recognized as a Contact** (that is, if the name is NOT in the Schedule’s Address Book), an “Add New” option will pop up. Click Add New, then fill in the displayed Add/Edit Address Book dialog box to add the new Contact to the Schedule’s Address Book. After the new entry is saved, the new Contact name will be entered into the Attendee(s) field.

If you want to schedule the appointment for multiple Attendees, repeat Step 5, as necessary.

If you like, edit the Subject field. (A default Subject is entered for you.)

Adjust the appointment Start and/or End times, if necessary.

➤ **NOTE:** Clicking the All Day checkbox makes the appointment an All Day appointment.
9 Add **Description** text, if necessary. (This is optional.)

10 If you want the appointment to be a Recurring appointment, select the **Recur-**
ence **checkbox.** This displays additional Recurrence options:

![Recur-rence options](image)

11 If you are scheduling a Recurring appointment, specify the Recurrence pattern
you prefer (i.e., Hourly, Daily, Weekly, etc.). Then, if necessary, use the “**End after**” or “**End by**” setting to specify the end of the Recurring appointment.
- *(No end date is selected by default. If you leave this as is, the Recurring Appointment will run indefinitely.)*

12 When you’re finished, click **Save** to save and close.

The appointment is now saved and displayed in the Calendar.

If the Confirmation feature has been enabled for the Schedule (at Settings >
Email Setup > Confirmation Settings), an Appointment Confirmation message is
sent to the appointment Attendee(s) and/or Provider.

---

**NOTES**

- If the Appointment Confirmation feature is enabled for a Schedule, Appointment Confirmation messages are sent to Attendees and/or Providers whenever appointments are **created, updated, or cancelled.** See page 66 for more information.
- Recurring Appointments can only be scheduled in the Calendar section. The Manage Appointments section does not currently support this feature. Recurring Appointments scheduled in the Calendar do **appear** in Manage Appointments, but they are “view only.”
- If a qualified User attempts to edit or cancel a Recurring Appointment, a pop-up prompt requires the User to specify if the single occurrence or complete series of appointments should be changed/canceled.
- Recurring Appointments are marked in the Calendar page with a symbol that looks like this: 

![Recur-rence symbol](image)
Using the Calendar Block Out Feature

The Calendar section has a “Block Out” feature that you can use to “block out” normally-available time periods as **Unavailable** for Scheduling.

You can block out time periods:

- **For a specific Provider** (for example, if the Provider will be attending a conference, and will therefore be unavailable for appointments).
- **For a specific Appointment Type** (for example, if a piece of equipment necessary for that Appointment Type will be down for servicing).
- **For a specific Provider and Appointment Type**
- **For ALL Providers and ALL Appointment Types** (for example, if the whole office will be closed for a holiday).

Follow these steps to apply the Block Out feature to a Calendar:

1. Select **Calendar** from the Appointment Scheduler Navigation Menu.
   
The Calendar screen is displayed, with the current Week represented, by default.
2. If it's not already selected, select the Schedule for which you want to schedule an appointment by clicking more ▾ (upper-right corner), then choosing from the drop-down menu.

3. Use Calendar screen controls, if necessary, to display the time period that you want to block off. (See page 88 for information on Calendar view controls.)

4. When the desired view is displayed, drag your mouse over the Calendar to select the time period you want to block off (the area will turn yellow), then right-click to display the Block Out pop-up menu, like the one shown below.

5. Select from the menu to block off a time period for one of the following:
   - For a specific Provider for all Appointment Types (select By Provider > Provider name).
   - For a specific Provider and a specific Appointment Type (select By Provider > Provider name > appointment type).
   - For a specific Appointment Type (select By Appointment Type > appointment type).
   - For All Providers and All Appointment Types (select All).
After you’ve selected, the Blocked Out time is represented on the Calendar, something like this:

### Viewing, Editing, or Cancelling a Blocked-Out Period

If you want to **cancel**, **edit**, or **view details** associated with a Blocked Out period, right-click over the Blocked Out area, then select **cancel** or **view** from the pop-up menu that displays.

If you selected **view** from the pop-up menu, a dialog box like the following opens:

Here, you can review the details of the Blocked Out “appointment,” or make changes, then click **save** to save and close. (Cancel closes without saving.)
ADDRESS BOOK

The Address Book section of the Appointment Scheduler interface is where Names, Addresses, and other Contact Information is entered for Schedule-specific Contacts. These will be the “Attendees” who will be scheduled for appointments with Providers.

To access this section, select Address Book from the Appointment Scheduler Navigation Menu. If Addresses have already been added for the selected Schedule, they are listed, as shown below.

If the desired Schedule is not selected when you open the screen, choose the one you want by clicking more ▼, then selecting from the drop-down list. (The list will only include Schedules that your User account authorizes you to access.)

From the Address Book screen, you can add, edit, and delete Contacts. You can also use an Expand function to show appointments scheduled for a Contact, and export Address Book items to an Excel or CSV (Comma Separated Values) file.

- **To add an entry to the Address Book:** Click + Add new entry. (See page 97.)
- **To see appointments associated with a listed Contact:** Click the associated ▶ (Expand/Collapse) icon. (See page 98.)
- **To edit an entry:** Click the associated ✏ icon.
- **To delete an entry:** Click the associated ✗ icon.
- **To export Address Book items to an Excel File:** Click the icon.
- **To export Address Book items to a CSV File:** Click the icon.
Grouping & Sorting Address Book Items

You can **Sort** Address Book items by any column by simply clicking on the column heading. For example, to sort items by First Name, you would click on the **First Name** column heading. (Items are sorted by Last Name by default.) Clicking on the column heading again would sort in the reverse order. (An up- or down-pointing arrow in the highlighted column heading shows you if the column is sorted in ascending (up) or descending (down) order.)

If you like, you can also **Group & Sort** Address book items, which works like this: You **group** by one column—for example, City—then **sort** the groups—for example, by First Name.

**To Group Items:** Drag the column heading and drop it between the two arrows in the “Drag & Drop” area at the top of the Address Book table.

**To Sort Grouped Items:** Click on the desired column heading.

In these sample screens, Address Book items have been **grouped** by City, then **sorted** by First Name.
Adding an Address Book Entry

Before a person can be scheduled for an appointment with a Provider, it's necessary to add the person to the appropriate Schedule's Address Book.

➢ NOTE: Contacts can also be added to the Address Book “on the fly” at the time an appointment with a Provider is scheduled. See page 90 or page 107 for details.

Follow these steps to add a Contact to a Schedule’s Address Book:

1. Select Address Book from the Appointment Scheduler Navigation Menu. The Address Book screen is displayed.

2. If it’s not already selected, select the appropriate Schedule by clicking more ▼ (upper-right corner), then choosing from the drop-down menu.

3. Click  

The Add/Edit Address Book Entry dialog box opens.

4. Fill in this screen with required information, and additional information, as needed.

5. When you’re finished, click Save to save and close.
Using the Address Book Expand/Collapse Function

For each entry in a Schedule’s Address Book, there is an Expand/Collapse function that can be used to quickly see appointments that have been scheduled for that Contact. (Both past and future appointments can be seen.)

Follow these steps to use the Expand/Collapse function for a Contact:

1. Select Address Book from the Appointment Scheduler Navigation Menu. The Address Book screen is displayed.

2. If it’s not already selected, select the appropriate Schedule by clicking more (upper-right corner), then choosing from the drop-down menu.

3. Click the icon associated with the Contact whose appointments you want to check.

- **NOTE:** At the bottom of the list, page controls allow you to adjust the number of items listed per page (Page Size), and select the page that is displayed. In addition, a Refresh feature can be used to refresh the list, if necessary.
The list expands to show the appointments (past and future) that have been scheduled for that Contact.

### 4 Notice the (Edit Appointment) and (Reschedule Appointment) icons on the left side of the expanded area.

- Click the (Edit Appointment) icon if you want to **Edit the Appointment, but retain the same Provider**. In the Add/Edit Appointment dialog box that opens, you can do any of the following, if necessary:
  - Change Appointment Attendees
  - Edit the Appointment Subject
  - Add/edit Description text
  - Reschedule the Appointment for another Date and/or Time
  - Cancel the Appointment

- Click (Reschedule Appointment) if you want to **Reschedule the appointment** for another date and/or time, and, if necessary, make any of the following additional changes:
  - Change the Appointment Type
  - Change the Appointment Provider
  - Change Appointment Attendees
  - Edit the Appointment Subject
  - Add/edit Description text

### 5 When you’re finished, click the icon again to restore the Contacts list to its normal (non-expanded) state.
**MANAGE APPOINTMENTS**

Before appointments can be scheduled, it’s necessary to perform set-up procedures in the Settings and Providers sections of the application.

The Manage Appointments section of the Appointment Scheduler interface offers multiple features for adding and managing Appointment Scheduler appointments.

Number labels in the screen below identify features that are available to both Site Users (who can schedule appointments for multiple Schedules), and Schedule-specific Users (who will manage appointments for their own Schedules).

Refer to the table that follows for a brief description of these features, and links to topics that contain more detailed information.

![Manage Appointments Screen](image)

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
</table>
| 1       | Clicking ![Schedule New Appointment](image) opens a screen where you can schedule a new appointment. See "Scheduling an Appointment in Manage Appointments" on page 105 for complete information.  
  ➢ Note: You can also schedule an appointment by clicking ![Add new appointment](image) in the Manage Appointments screen. |
<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
</table>
| **2** | The **Find by Confirmation #** feature allows you to quickly locate an appointment by Confirmation Number. Simply type the number you want to locate, then click **Find**.  
**Notes:**  
➢ Confirmation numbers are reported in a pop-up after an appointment is scheduled, and sent to appointment Attendees in Confirmation messages, but they are not currently saved in appointment Edit screens. This feature allows a User to quickly locate an appointment for editing if an Appointment Attendee calls up and gives the Confirmation Number associated with the appointment he/she wants to change or cancel.  
➢ See page 108 for more on Appointment Confirmation Numbers. |
| **3** | **Day, Week, and Month** buttons allow you to choose whether the list includes appointments for a Day, Week, or Month.  
**And please note:** The **Date** field entry affects your choice as follows:  
• **Day:** The list includes appointments on the day represented in the Date field.  
• **Week:** The list includes appointments for the Calendar Week that includes the day represented in the Date field.  
• **Month:** The list includes appointments for the Calendar Month that includes the day represented in the Date field. |
| **4** | The **Provider** drop-down menu allows you to select the Provider for whom you want to list appointments.  
➢ **Note:** The currently selected Schedule determines the list of Providers that you can choose from. |
| **5** | The **Appointment Type** drop-down menu allows you to indicate the Appointment Type that you want to list. Selecting **All** (the default entry) lists all appointment types.  
➢ **Note:** The currently selected Provider determines the Appointment Types that you can choose from. |
<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>6</strong></td>
<td>Features associated with the <strong>Date</strong> field allow you to quickly select the desired <strong>Date</strong> entry. (See above for how the Date entry affects Day, Week, and Month selections.)</td>
</tr>
<tr>
<td></td>
<td>• Clicking the <strong>icon</strong> opens a Calendar from which you can select a date in any Calendar month.</td>
</tr>
<tr>
<td></td>
<td>• Clicking the <strong>(Previous) icon</strong> moves the currently selected date <strong>back</strong> one day, week, or month, depending on the <strong>selection</strong> (i.e., if Month is selected, <strong>3/28/2012 becomes 2/28/2012</strong>).</td>
</tr>
<tr>
<td></td>
<td>• Clicking the <strong>(Next) icon</strong> moves the selected date <strong>forward</strong> one day, week, or month, depending on the <strong>selection</strong> (i.e., if Month is selected, <strong>3/28/2012 becomes 4/28/2012</strong>).</td>
</tr>
<tr>
<td></td>
<td>• Clicking <strong>Today</strong> enters the current date into the <strong>Date</strong> field.</td>
</tr>
<tr>
<td><strong>7</strong></td>
<td>Clicking the <strong>(Expand) icon</strong> associated with a listed appointment expands the list screen to display additional features that can be applied to the selected appointment.</td>
</tr>
</tbody>
</table>

See **“Using Manage Appointments “Expand” Features”** on page 109 for complete information.
Clicking the **Edit Appointment** icon associated with an appointment opens an Add/Edit Appointment dialog box where you can **Edit**, **Reschedule**, or **Cancel** the selected appointment.

Notice the “**Key**” text that appears below the **Attendee(s)** field:

**Key: Confirmed - Checked In - Checked Out - No Show**

This tells you how to interpret Attendee status based on the **color** of the Attendee name. For example, in the above screen, the **green** used for the Attendee name tells you that Robert Tully’s status is “**Confirmed**.” If a name appears in black, it means that no special status has been applied to the Attendee.

To assign a special “Status” to an Attendee, you use one of the **Status** icons that appear when an appointment is expanded in the Manage Appointments screen. (See **7**.)

Clicking the **Reschedule Appointment** icon for an appointment opens an **“Appointment Availability”** screen that you can use to Reschedule the appointment, if necessary. (This icon is disabled when an appointment has expired.)

See “**Scheduling an Appointment in Manage Appointments**” on page 105 for details on the Appointment Availability screen.

Clicking the **Cancel Appointment** icon for an appointment cancels the appointment. (This icon is disabled when an appointment has expired.)

Clicking the **Refresh** icon refreshes the Manage Appointments screen if any changes to the appointments schedule have occurred since you opened the Manage Appointments screen.

Since multiple Users are able to access the Appointment Scheduler at the same time, it’s possible that another User has made a change that will become apparent when the Refresh command is applied.
Clicking the **Export to Excel** icon initiates an operation that exports the Appointments data to an Excel file. After clicking the icon, follow simple on-screen instructions. (Instruction prompts will vary slightly depending on your browser.)

Page controls at the bottom of the screen allow you to adjust the number of items listed per page (Page Size), and select the page that is displayed (if items span multiple pages).

- The controls let you move to the next, previous, first, or last page of the Manage Appointments list. (The current page number is shown at the center of the control arrows.)
- The **Page size** feature lets you specify how many items you want listed per page. Choices on the drop-down menu are 10, 15, 20, and 50.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>12</strong></td>
<td>Clicking the <strong>Export to Excel</strong> icon initiates an operation that exports the Appointments data to an Excel file. After clicking the icon, follow simple on-screen instructions. (Instruction prompts will vary slightly depending on your browser.)</td>
</tr>
</tbody>
</table>
| **13** | Page controls at the bottom of the screen allow you to adjust the number of items listed per page (Page Size), and select the page that is displayed (if items span multiple pages).  
- The controls let you move to the next, previous, first, or last page of the Manage Appointments list. (The current page number is shown at the center of the control arrows.)  
- The **Page size** feature lets you specify how many items you want listed per page. Choices on the drop-down menu are 10, 15, 20, and 50. |
Scheduling an Appointment in Manage Appointments

Selecting Manage Appointments from the Appointment Scheduler Navigation Menu displays a screen from which you can schedule an appointment for any Schedule for which you have scheduling privileges.

Follow these steps to schedule an appointment from the Manage Appointments screen:

1. Select Manage Appointments from the Appointment Scheduler Navigation Menu.
   The Manage Appointments screen is displayed.

2. If it’s not already selected, select the Schedule for which you want to schedule an appointment by clicking more (upper-right corner), then choosing from the drop-down menu.

3. Click .
   Appointment Availability features are displayed:

   Note: You can use the arrow controls at the top of the first calendar to display different months, if necessary.

4. If necessary, click inside a displayed Calendar to select the day for the appointment. (The current date is selected by default.)

5. Open the Provider drop-down menu and select the Provider for whom you want to schedule an appointment.
6 Open the **Appointment Type** drop-down menu and select the Appointment Type that you want to schedule. (The menu offers only Appointment Types that the selected Provider is configured to provide.)

The screen is now updated to show you the Provider’s available time slots for the week containing the selected date.

➤ **NOTE:** A week is displayed in this screen even if you selected Day or Month in the initial Manage Appointments list screen.

---

**Appointment Availability**

Use this screen to select an available timeslot for a new or existing appointment.

---

**Client Time:** 2/1/2012 1:59:52 PM

---

Please note the following in the displayed screen:

- Time slots that are in the past are grayed out.
- Future times that are shown in red are ones for which there is no availability.
- In the calendars on the left side of the screen, **red** days are *unavailable* for scheduling; **green** days are *available* for scheduling; the **orange** day is the current date; and **yellow** days indicate partial availability. (**Note:** The color associated with the current date (orange in this example) is determined by the Schedule’s selected color scheme, or “skin” assignment.)

7 In the display of available time slots, click on the desired appointment time.
An Add/Edit Appointment dialog box opens.

8 In the Attendee(s) area, begin typing the last name of the appointment “Attendee.”

One of two things will happen:

- **If the name you’re typing is recognized as a Contact** (that is, if the name is in the Schedule’s Address Book), that name will pop up for selection. Select it to enter it into the Attendee field. (You must type at least 3 characters for a name to be recognized.)

- **If the name you’re typing is NOT recognized as a Contact** (that is, if the name is NOT in the Schedule’s Address Book), an “Add New” option will pop up. Click Add New, then fill in the displayed Add/Edit Address Book dialog box to add the new Contact to the Schedule’s Address Book. After the new entry is saved, the new Contact name will be entered into the Attendee(s) field.

9 If you want to schedule the appointment for multiple Attendees, repeat Step 8 for each additional Attendee.

10 If you like, edit the Subject field entry. (A default Subject is entered for you.)

11 Add Description text, if necessary. (This is optional.)

12 When you’re finished, click Save to save and close.
A confirmation message pops up, providing a Confirmation Number that should be provided to the caller.

### Appointment Confirmation

- **Confirmation #:** PAT0202121981
- **Provider:** Neiles, Victoria
- **Type:** Grooming
- **Start:** 2/2/2012 2:00:00 PM
- **End:** 2/2/2012 3:00:00 PM
- **Attendee(s):** Tully, Robert
- **Subject:** Grooming, Robert Tully
- **Description:**

14. Click to close the Appointment Confirmation. (Or select Edit Appointment or Cancel Appointment to edit or cancel the appointment, if necessary.)

The appointment is now saved, and an Appointment Confirmation message is sent to the Attendee(s) and/or Provider (if enabled at Settings > Email Setup > Confirmation Settings).

- **NOTE:** Appointment Confirmation messages (if enabled for a Schedule) are sent to Attendees and/or Providers whenever appointments are created, updated, or cancelled. See page 66 for more information.
Using Manage Appointments “Expand” Features

Clicking the (Expand) icon associated with an appointment listed in the Manage Appointment screen expands the screen to display features that you can apply to the appointment.

When an appointment is expanded in the list screen, you can:

- Click the icon to open the Add/Edit Appointment dialog box, where you can Reschedule the Appointment, Cancel the Appointment, or change the appointment Attendees, Subject, or Description.
- Click the (Confirm) icon to indicate that the attendee had confirmed the appointment.
- Click the (Checkin) icon to indicate that the attendee had checked-in for the appointment.
- Click the (Checkout) icon to indicate that the attendee had checked-out of the appointment.
- Click the (No Show) icon to indicate that the attendee was a “No Show” for the appointment.
- Select the Attendees Email address (if available) to send an email the Attendee.
- Use the listed phone number (if available) to call the Attendee.

NOTES

- Notice the checkboxes in the second column of the expanded area. If the appointment has multiple Attendees, you can use these to select individual Attendees (or the top checkbox to select all Attendees), then select one of the icons to apply a “Status” to all selected Attendees at once.
- If you use the Checkin and Checkout features, the Checkin and Checkout times will be shown in Checkin Time and Checkout Time columns that appear for the expanded appointment.
Chapter 3: Integrating the Appt. Scheduler with Your CMC

This chapter shows you how to integrate the Appointment Scheduler with your Startel CMC (11.0 or above) by configuring elements in the Admin Controls Site Settings, Client Maintenance, and Agent Maintenance plug-ins.

If you perform the simple procedures described here, agents will be logged into the Appointment Scheduler automatically when client Schedules are accessed from Agent Interface.

Topics in this chapter include:

- Configuring the Appt. Scheduler in Site Settings (page 112)
- Configuring the Appt. Scheduler in Client Maintenance (page 113)
- Configuring the Appt. Scheduler in Agent Maintenance (page 114)
CONFIGURING THE APPT. SCHEDULER IN SITE SETTINGS

If you want agents to be able to access client Schedules from Agent Interface without having to log in to the Appointment Scheduler, you need to configure the Appointment Scheduler element in the Site Settings plug-in.

➤ NOTE: Before you can perform this procedure, it's necessary to define a Default Site User Account in the Site Admin > Users section. See page 41 for details.

Follow these steps to configure the Appointment Scheduler element in Site Settings:

1. Open the Admin Controls Site Settings plug-in.
2. Select the Appointment Scheduler element on the left side of the screen. A page like the following is displayed:

   ![Site Settings stepping through the configuration process]

   This Site Admin User Account is used for authentication with the server.

3. In the User Id field, enter the User Name associated with any defined Site Admin User Account. (A Site Admin User Account is any Site User Account that has been given FULL Site Administrator privileges via the Site Admin checkbox in the Site User setup screen.)

4. In the Password field, enter the password associated with the specified Site Admin User Account.
5 In the **Default User Id** field, enter the User Name of the Site User Account that should be used as the **Default Site User Account**. (See "Defining a Default Site User Account" on page 41.)

6 In the **Base URL** field, enter the Appointment Scheduler URL. The Startel-hosted URL (which should normally be entered) is shown in the sample screen (https://schedule.startel.com/Default.aspx).

7 To save, click on the Admin Controls toolbar.

**CONFIGURING THE APPT. SCHEDULER IN CLIENT MAINTENANCE**

For every client whose Schedule should be accessible from Agent Interface, you will need to configure the **Appointment Scheduler** element in Client Maintenance.

**Follow these steps to configure the Appointment Scheduler element for a specific client:**

1 Open the Client Maintenance plug-in and select the desired client.

2 Select the **Appointment Scheduler** element on the left side of the screen (under the **Applications** heading).

   A screen like the following is displayed:

3 Select the **Enable** checkbox.
4 In the **Schedule** field, enter the value that you assigned as the Schedule’s **Account ID**.

5 If you want the client’s Schedule to open automatically during a call for the client, select the **Automatically display on new call** checkbox.

6 To save, click **[ ]** on the Admin Controls toolbar.

**CONFIGURING THE APPT. SCHEDULER IN AGENT MAINTENANCE**

If you want a particular agent to have Appointment Scheduler privileges that are different from the privileges assigned to the Default Site User Account—or if you want the agent to use a different Site User Account for the purposes of Activity Log accuracy—you can assign a different Site User Account to that agent in Agent Maintenance.

**Follow these steps:**

1 Open the Agent Maintenance plug-in and select the desired agent.

2 Select the **Appointment Scheduler** element on the left side of the screen. A screen like the following is displayed:

3 In the **User Id** field, enter the User Name associated with the Site User Account that should be used for the agent.

4 To save, click **[ ]** on the Admin Controls toolbar.
Index

A
Access Groups 35
  adding 36
  and new Schedules 35
  deleting 36
  editing 36
Account ID 27, 28
Activity Log reports 42
  contents 43
  generating 43
  page controls 44
  sorting 44
Add/Edit Access Group
  dialog 37
Add/Edit Address Book Entry
  dialog 97
Add/Edit Appointment
  dialog 107
Add/Edit Appointment Type
  settings 65
Add/Edit Custom Field
  dialog 72
Add/Edit Provider Appointment
  Type settings 85
Add/Edit Provider Work Day
  settings 82
Add/Edit Role dialog box
  for Schedules 53
  for Site Users 30
Add/Edit Role settings
  for Schedules 54
  for Site Users 31
Add/Edit Schedule dialog
  box 27
Add/Edit User dialog box
  for Schedules 58
  for Site Users 40
Add/Edit Work Day dialog 82
  adding a Schedule 27
  adding User Accounts for a
  Schedule 57
Address Book 13, 71
  grouping and sorting
  items 96
Address Book section 95
  adding items to 97
  Appointment Availability
  screen 105
  deleting appointment in 95
  editing appointment in 95
  exporting appointments in 99
  exporting appointment items
to files 95
  page controls 98
  rescheduling appointments
  in 99
  using Expand/Collapse
  function 98
Address Book summary 21
Admin Controls 112
  All Day checkbox 90
Appearance
  configuring for Schedules 50
  Appointment Availability
  screen 105
  Appointment Checkin Time 109
  Appointment Checkout
  Time 109
  Appointment Confirmation 108
  Appointment Confirmation
  number 108
  Appointment Limits settings 83
  Appointment Reminders 68
  Appointment Scheduler
  and User Accounts 12
  Attendees 13
  Basics 10
  customizing logo 25
  defined 10
  integrating into CMC 111
  launching from URL 11
  login screen 11
  Navigation Menu 12, 14
  Schedules 10
  screen appearance 25
  Site Admin section 24
  skin 25
  User Accounts 12
  user interface 12, 14
  what you should read before
  using the application 12
Appointment Scheduler
  GUI 12
  Providers 13
  Appointment Scheduler
  Schedules 10, 13
  Appointment Type setting 85
  Appointment Types 64, 84
  selecting in Calendar 88
Appointment Types screen 64,
  84
  appointments
  deleting in Address Book 95
  editing in Address Book 95
  exporting from Address Book
to Excel or CVS files 95
  Attendee(s) field 90, 107
  Attendees 13
  and appointment reminders
  68

B
Billing Report parameters 45
Billing Report screen 45
Billing reports 42
  exporting to CSV file 47
  exporting to Excel file 47
  generating 45
  printing 47

C
Calendar Allow Availability
  Override setting 55
Calendar Block Out feature 92
  viewing, editing, or
  cancelling blocked-out
  period 93
Calendar Block Out menu 93
Calendar screen 61
Calendar section 87
  Appointment Confirmation
  messages 91
  Calendar Block Out
  feature 92
  cancelling appointment in 88
  editing appointment in 87
  hiding Provider
  appointments in 89
  hovering mouse for
  appointment details 87
  Month view 89
  right-clicking in 88
  scheduling an appointment
  in 88
  selecting Providers and
  Appointment Types in 88
switching Calendar page 88
Calendar settings 61
Calendar Setup 60
Calendar summary 20
Cancelling a Blocked-Out Period 94
Checkin icon 109
Checkout icon 109
Client Maintenance plug-in 113
configuring Roles for Schedules 52
Confirm icon 109
Confirmation Number 108
Confirmation settings for Schedules 66
Confirmation Settings screen 67
Contact Information for Provider 77
Contact Information for Schedule 50
Contact Information screen for Provider 77 for Schedule 50
Contacts 13
Copy Confirmation to additional email addresses setting 67
Copy Role to Schedule feature 29
copying Site User Roles to Schedules 34
custom Address Book fields 71
adding to Schedule Address Book 71, 72
and emailing 74
and encryption 74

D
Default Site User Account defining 41
Disabled Start Times settings 83
Duration setting 85

E
Email Format settings for Schedules 69
Email Formats screen 70
End Day At setting 62
End Week On setting 62
End Work Day At setting 62
Exact Time Rendering setting 63
Expand icon 109
Expand/Collapse function in Address Book 98
and Edit Appointment feature 99
expanding Contact in Address Book 98
Export to Excel 104

K
Key text and Attendee(s) field 103

L
launching Appointment Scheduler from URL 11
Locked Out column in Users screen 39, 59
login screen 11
Login Username and Password 11
logo customizing for Schedule 51
Lunch Time setting 83

M
Manage Appointments 100, 101
Manage Appointments expanded screen and Attendee Email address 109
and Attendee phone number 109
checkboxes in 109
Checkin Time and Checkout Time columns 109
using Checkin icon 109
using Checkout icon 109
using Confirm icon 109
using No Show icon 109
Manage Appointments section 13, 100
and Appointment Confirmation number 108
and Appointment cancelling appointment 103
Day, Week, and Month buttons 101
editing appointment 103
Expand feature 102, 109
Find by Confirmation # 101
page controls 104
refreshing screen 104
rescheduling appointment 103
scheduling appointment 100, 105
selecting Appointment Type 101
selecting Date 102
selecting Provider 101
Manage Appointments summary 22
Max Concurrent setting 83, 86
Max Per Day setting 86
Max setting 83
More menu for selecting Schedules 48

N
No Show icon 109

P
Procedures
adding a new Schedule 27
adding a new Site User Role 40
adding an Access Group 36
adding Contact to Schedule’s Address Book 97
adding Custom Field to a Schedule’s Address Book 72
applying the Block Out feature to a Calendar 92
cancelling appointment in Calendar 88
cancelling appointment in Manage Appointments 103
cancelling blocked-out period in Calendar 94
changing or deleting appointments in Manage Appointments 103
configuring Appointment Reminders for a Schedule 68
configuring Appointment Scheduler element in Site Settings plug-in 112
configuring Appointment Scheduler in Agent Maintenance plug-in 114
configuring Appointment Scheduler in Client Maintenance plug-in 113
configuring Calendar Settings for a Schedule 60
configuring Provider Appointment Types 84
configuring Provider Work Days 80
configuring Roles for a Schedule 52
configuring the Appearance for a Schedule 50
configuring Users for a Schedule 57

coping Site User Role 33
copying a Role to Schedules 34
copying a Role 56
copying a Schedule-specific Role 56

customizing an Email Format for a Schedule 69
customizing the Appointment Scheduler “Default” appearance 26
defining Appointment Types for a Calendar 64
defining Default Site User Account 41
defining Email Setup Confirmation Settings for a Schedule 66
deleting a Provider 79
deleting a Schedule 27
deleting a Schedule-specific Role 56
deleting a Site User 39
deleting Address Book entry 95
deleting an Access Group 36
deleting Appointment Type 64, 84
deleting Schedule User 60
editing a Schedule 27
editing a Schedule-specific Role 56
editing a Site User 39
editing a Site User Role 29
editing Address Book entry 95
editing an Access Group 36
editing appointment in the Calendar section 88
editing Appointment Type 64, 84
editing blocked-out period in Calendar 94
editing Schedule User 60
entering Contact Information for Provider 76
exporting Address Book items to files 95
exporting appointments from Manage Appointments section 104
exporting Billing report contents to Excel or CSV file 47
generating a Billing report 45
generating an Activity Log report 43
grouping and sorting Address Book items 96
scheduling an appointment in Manage Appointments 105
scheduling appointment in the Calendar section 88
selecting Providers and Appointment Types in the Calendar section 88
sorting Activity Log items 44
updating Contact Information for a Schedule 49
using Manage Appointments features 101
using the Expand/Collapse function for an Address Book Contact 98
viewing appointment in the Calendar section 88
Provider Appointment Types configuring 84
Provider Work Days settings 83
Providers 13
and appointment reminders 68
Contact Information screen 77
copying Work Days 81
defining Appointment Types for 84
defining Work Days for 80
deleting 79
deleting and cancelled appointments 79
deleting Work Days 81
editing Work Days 81
entering Contact Information 76
hiding in Calendar 89
selecting in Calendar 88
Work Days screen 81
Providers > Provider Information 76
Providers > Provider Setup 80
Providers section 75
Providers summary 19

R
Recurrence checkbox 91
Recurrence setting 62
Recurring Appointments 91
and Manage Appointments section 91
cancelling 91
editing 91
symbol used in the Calendar to identify 91
Refresh button in Appointment Availability screen 106
Refresh icon 103
Reminder settings for Schedules 68
Reminder Settings screen 68
Roles and Site Admin Users 28
for Schedules 52
recommended Roles 29
Roles (for Schedules) 52, 55
and Copy Roles to Schedules feature 52
editing, copying, and deleting 56
Roles (for Site Users) 28
adding 30
and Copy Role to Schedule feature 29
Calendar Allow Availability Override setting 32
Calendar Appointment Type Override setting 32
copying 29, 33
copying to Schedules 29, 34
deleting 29
editing 29

S
Schedule Allow Availability Override setting 33, 56
Schedules 10, 13
adding 27
adding items to Schedule’s Address Book 97
adding User Accounts for 57
and Confirmation settings 66
and Email Confirmation options 67
and Email Format settings 69
and Email Setup 66
and Reminder settings 68
and Settings section 48
configuring Appearance for 50
configuring Calendar settings 60
defining Appointment Types for 64
defining Providers for 75
deleting 27
editing 27
selecting 48
updating Contact Information for 49
Schedule-specific logos 51
scheduling appointment in Calendar section 88
and Appointment Confirmation messages 91
and Attendee field 90, 107
and Subject field 90
selecting Schedules 48
Send Appointment Confirmation to Attendee(s) of the Appointment setting 67
Send Appointment Confirmation to the Provider of the Appointment setting 67
Send as iCalendar Event setting 67
Settings > Address Book Setup 71
Settings > Calendar Setup 60
Settings > Email Setup 66
Settings > Schedule Information 49
Settings section 48
adding Roles for a Schedule 52
adding User Accounts for a Schedule 57
and Appointment Types 64
and Confirmation settings 66
and Email Format settings 69
and Email Setup 66
and Reminder settings 68
and updating Schedule Contact information 49
configuring Appearance for a Schedule 50
configuring Calendar Settings 60
defining Roles for Schedules 52
Menu Box 48
Settings summary 17
Site Admin > Access Groups 35
Site Admin > Appearance 25
Site Admin > Reports 42
Site Admin > Roles 28
Site Admin > Schedules 26
Site Admin > Users 39
Site Admin screen 25
Site Admin section 24
adding a Schedule 27
Menu Box 24
Schedules screen 26
Site Admin summary 15
Site Admin User 12
Site Settings plug-in 112
Site Setup Checklist 24
Site User Accounts 39
Add/Edit User dialog box 40
adding 40
Default Site User Account 41
deleting 39
editing 39
sorting 39
Site Users and Access Groups 35
Roles 28
skin 25
selecting for a Schedule 51
Start Day At setting 62
Start Week On setting 62
Start Work Day At setting 62

T
Time Interval setting 63

U
User Accounts and Locked Out status 39, 59
enabling and disabling 41, 59
User Accounts (for Schedules) 57
editing 60

W
What is the Appointment Scheduler? 10