## Calendar Enhancements

PCE has recently upgraded the Calendar modules used by several of our Clients based on suggestions from Clients as well as the PCE Programmers. This document was created to guide Users and Support Staff through the changes. The impact to Staff currently using the Calendar should be negligible. The main functions of the Calendar, i.e. adding appointments, availability, marking Consumer Attendance, etc., have not changed. The enhancements are centered on making the Calendar a little more "UserFriendly" with two more views and some minor changes to some existing views and navigation.

## Navigational Changes

- The "View" links have been removed and replaced with buttons. The current "View" is highlighted so the User knows which "view" he/she has accessed.

| 逮 $\downarrow$ | Jan 30th - Feb 5th 2011 |  | - Jumo... Today | Day | List |  | Week | Month |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | Clare Rogers |  |  |  |  |  | $\begin{aligned} & \text { Ghow Weekends } \\ & \text { Eridav Ath } \end{aligned}$ |  |
|  | Monday 31st | Tuesday 1st | Wednesday 2nd | Thursdav 3rd |  |  |  |  |
| 7:00AM |  |  |  | "View" Buttons - Week view is Highlighted |  |  |  |  |
| 7:30am |  |  |  |  |  |  |  |  |

- When switching from View to View, the User may be asked to select a Staff or a day of the week. For example, when switching from the "Week" to the "Multi" view the User will click the specific day he/she wishes to access.

| 㖆 $<$ | Jan 30th - Feb 5th 2011 |  | mp... Today | Day | List | Multi | Week | Month |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Clare Rogers |  |  |  |  |  | Select a Day <br> Sunday <br> Monday |  |  |
|  | Monday 31st | Tuesday 1st | Wednesday 2nd | Thursday 3rd |  |  |  |  |
| 7:00AM |  |  |  |  |  | Monday |  |  |
| 7:15AM |  |  |  |  |  | Wednesc |  |  |
| 7:30AM |  |  |  |  |  | Thursday |  |  |
| 7:45AM |  |  |  |  |  | Friday |  |  |
| 8:00AM |  | 8:00AM - 1:00PM <br> DD Case Management Supports Coor |  | 8:00AM - 10:00AM <br> DD Case Management <br> Supports Coor |  | Saturday |  |  |
| 8:15AM |  |  |  |  |  |  |  |  |
| 8:30AM |  |  |  |  |  |  |  |  |
| 8:45AM |  |  |  |  |  |  |  |  |

## Additional Views and Enhancements to Current Views

## General Information

- The ability to add Appointments and availability has not changed in this view. The User will still click and drag to select and access the data entry screens for adding appointments and/or availability
- The ability to "jump" has not changed. If the User "jumps" forward or backward the Calendar will display the selected format, i.e. if in a Week view the "jump to" week will be displayed
- The ability to add Staff to the Calendar has not changed. The User will still add Staff to the Calendar via the Add Staff link under Show Staff List


## Week View

- The User can now access a "Week" view. The Week view allows the User to view a Staff's Calendar for an entire week

| 䒼 | Jan 30th | th 2011 | D Jump... Today | Day | List | Multi | Week | Month |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | Clare Rogers |  | Show Weekends |  |  |  |  |  |  |
|  | Sunday 30th | Monday 31st | Tuesday 1st | Wednesday 2nd |  | Thursday 3rd |  |  | Friday 4th | Saturday 5th |
| 7:00AM |  |  |  |  |  |  |  |  |  |  |
| 7:15AM |  |  |  |  |  |  |  |  |  |  |
| 7:30AM |  |  |  |  |  |  |  |  |  |  |
| 7:45AM |  |  |  |  |  |  |  |  |  |  |
| 8:00AM |  |  | 8:00AM - 1:00PM <br> DD Case Management Supports Coor |  |  | 8:00AM - 10:00AM <br> DD Case Management Supports Coor |  |  |  |  |
| 8:15AM |  |  |  |  |  |  |  |  |  |  |
| 8:30AM |  |  |  |  |  |  |  |  |  |  |
| 8:45AM |  |  |  |  |  |  |  |  |  |  |
| 9:00AM |  |  |  |  |  |  |  |  |  |  |
| 9:15AM |  |  |  |  |  |  |  |  |  |  |
| 9:30AM |  |  |  |  |  |  |  |  |  |  |
| 9:45AM |  |  |  |  |  |  |  |  |  |  |
| $\left\|\begin{array}{r} 10: 00 \mathrm{AM} \\ 10: 15 \mathrm{AM} \end{array}\right\|$ |  |  |  |  |  | $\begin{gathered} \text { 10:00 } \\ \text { Che } \end{gathered}$ | $\begin{aligned} & \text { M - 11:0 } \\ & \text { ge View } \\ & \hline \end{aligned}$ | AM lore... |  |  |

- In Week view weekends can be omitted or displayed
- To display weekends the User will place a checkmark in the box labeled "Show Weekends"
- To omit weekends the User will remove the checkmark in the box labeled "Show Weekends"

- To access the Week view from the Month view, simply click the "Week" tab to the right of the week. If multiple Staff are currently displayed the User will click the Staff for whom they wish to view

- To access the Week view from the Day, List or Multi views, click the Week button. If multiple Staff are currently displayed the User will click the Staff whom they wish to view

| 囲 | Thursday, February 3rd 2011 | D Jump... Today | Day | List | Multi | Week | Month |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | Clare Rogers |  |  |  |  |  |  |
| 7:00AM $7: 15 A M$ |  |  | Click here to access the "Week" view |  |  |  |  |
| 7:30AM |  |  |  |  |  |  |  |
| 7:45AM |  |  |  |  |  |  |  |
| $\left.\begin{array}{\|r\|r\|} \hline 8: 00 \mathrm{AM} \\ 8.15 . \mathrm{M} \end{array} \right\rvert\,$ | :00AM - 10:00AM |  |  |  |  |  |  |

- The days listed in the Week view are links to that day's appointments. The User can click the day or use the Day view button



## Multi View

- Multi view is used to view multiple Staffs' appointments/calendar side-by-side per day. The Multi view will work if a single staff is selected; however the intent of this view is to allow the User to see all appointments/availability for multiple staff on a specific day. The process for adding Staff to the Calendar has not changed.

- To access the Multi view from the Month view, click the day to be viewed

- To access the Multi view from the Day or List view, click the Multi button

- To access the Multi view from the Week view, click the Multi button and select a day by clicking the appropriate link. Remember, the Multi view is limited to a per Day view

| 囲 $<$ | Jan 30th - Feb 5th 2011 |  | $D$ Jump... Today | Day | List | Multi | Week | Month |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Clare Rogers 1 of 5 Schedules... |  |  |  |  |  | Select a Day <br> Sunday |  |  |
|  | Monday 31st | Tuesday 1st | Wednesday 2nd | Thursday 3rd |  |  |  |  |
| 7:00AM |  |  |  |  |  |  |  |  |
| 7:15AM |  | ick | - salect a spe | ic da |  | Wednes |  |  |
| 7:30AM |  | Click | o select a sp | c day |  | Thursda |  |  |
| 7:45AM |  |  |  |  |  | Friday |  |  |
| 8:00AM |  | 8:00AM - 1:00PM |  | 8:00AM - 10 | 0A ${ }^{\text {a }}$ | Saturday |  |  |
| 8:15AM |  | DD Case Management |  | DD Case M |  |  |  |  |
| 8:30AM |  | Supports Coor |  | Supports Co |  |  |  |  |
| 8:45AM |  |  |  |  |  |  |  |  |

- The Staff listed in the Multi view are links to that Staff's appointments. The User can click the Staff Name or use the Day view button to access a particular Staff's appointments for the day


Day View

- No changes have been made regarding the Day view and functionality
- The Day View link has been replaced with a Day View button

| 㖆 $<$ | Thursday, February 3rd 2011 | $D$ Jump... Today | Day | List | Multi | Week | Month |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | Clare Rogers |  |  |  |  |  |  |
| 7:00AM |  |  |  |  |  |  |  |
| 7:15AM |  |  |  |  |  |  |  |
| 7:30AM |  |  |  |  |  |  |  |
| 7:45AM |  |  |  |  |  |  |  |

## List View

- A minor enhancement was made in the List view. Staffs' names now appear as links in the List view. To access a specific Staff's appointments the User can click the Staff's name


Month View

- The Month view now allows the User to work with Appointments that fall outside of the selected Month but within a week in that month. For example, the first of the Month falls on a Tuesday, the User can still access and work with the appointments on the Monday (last date of the previous month)


