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About this manual

Overview
This user manual describes how users can complete tasks within the CAS 02.50.00 system.
## Terminology

<table>
<thead>
<tr>
<th><strong>Role</strong></th>
<th>A role is a named container for a collection of permissions. Roles are usually named by the job function they represent (ex: agency administrator).</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Interactive user</strong></td>
<td>An interactive user is one that is presently logged into the website and who is interacting with the website. I.e. the logged-in user.</td>
</tr>
<tr>
<td><strong>Search filter</strong></td>
<td>When applied to search results, search filters constrain the search results to contain only those results that match the search filter. For example, on a page that lists the users in a system, using the “username” search filter would constrain the results to contain only those users that matched the search term.</td>
</tr>
<tr>
<td><strong>Search term</strong></td>
<td>A search term is the value entered into a search filter which is subsequently applied to filter the results. For example, the search term “john” is entered for the search filter “first name”.</td>
</tr>
<tr>
<td><strong>Search filter match type</strong></td>
<td>A search filter match type indicates the way in which a search filter finds search results. For example, the “contains” match type matches only those results which contain the search term.</td>
</tr>
<tr>
<td><strong>Appointment block type</strong></td>
<td>The type of appointments that are allowed to be made in a given appointment block. Ex. regular, overflow, etc. appointment types.</td>
</tr>
<tr>
<td><strong>Timeslots and Appointment blocks</strong></td>
<td>A timeslots represents a period of time, to which an appointment capacity can be assigned. A timeslot’s duration is always 30 minutes. An appointment block is a collection of timeslots which are grouped together and given a name. Blocks have a start date and time, an end date and time, and a capacity for each timeslot within the block. Appointment blocks are a convenience that allows a capacity to be applied once to a grouping of timeslots (e.g. 15 appointments are available for each 30 minute timeslot in the “8 AM to Noon” block).</td>
</tr>
<tr>
<td><strong>Slot / Appointment slot</strong></td>
<td>Used in the context of a timeslot. If a timeslot has an appointment capacity of 5 then there are 5 individual slots (or, appointment slots) in the timeslot.</td>
</tr>
<tr>
<td><strong>Schedule exception</strong></td>
<td>An appointment block which configures a one-time exception to the rolling schedule between a particular start and end time. That is, the appointment block creates an exception in the rolling schedule.</td>
</tr>
<tr>
<td>------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Rolling schedule</strong></td>
<td>An agency’s configured availability of appointments. It is configured on a Sunday-to-Saturday basis and which continues (or, rolls forward) indefinitely or until the rolling schedule’s end date. An agency may have one or more rolling schedules but only one may be in effect on a given date. It is recommended that an agency always have an open-ended rolling schedule (i.e. which has no end date) so that an agency’s effective schedule can always be calculated.</td>
</tr>
<tr>
<td><strong>Effective schedule</strong></td>
<td>An agency’s actual appointment capacity and availability, given its rolling schedule, schedule exceptions and made-appointments. In other words, the effective schedule shows us how many appointments have been made and whether any appointment capacity remains.</td>
</tr>
<tr>
<td><strong>Appointment conflict</strong></td>
<td>An appointment conflict exists when the number of confirmed appointments in a timeslot exceeds the scheduled capacity. For example, this happens when there are confirmed appointments in a given timeslot and an administrator blocks all appointments in that timeslot to accommodate a last minute staff meeting; the appointments in that timeslot are in conflict.</td>
</tr>
<tr>
<td><strong>Appointment note</strong></td>
<td>An appointment note is a text description (or note) which is added by a user to a particular appointment. A note is used to store additional info about an appointment, such as to document that a user called to let the agency know they would be late arriving to the appointment.</td>
</tr>
<tr>
<td><strong>Region</strong></td>
<td>Regions serve as a means to group several agencies together under a given name. Users that are a member of a role that is permitted to run a report will be able to run the report for any or all agencies in a region if the user is also a member of that region. Roles can also be created at a regional level, which grants member users the underlying permissions for all agencies in a given region.</td>
</tr>
<tr>
<td><strong>AT&amp;T Integrated Voice Response (IVR) telephone system</strong></td>
<td>The AT&amp;T IVR is the automated telephone system which customers use to make an appointment at a passport agency.</td>
</tr>
</tbody>
</table>
Document conventions

**Left navigation links**

To indicate that the interactive user should click a series of links in order to reach a destination web page, this document shall place a “greater than” (>) symbol between each link to be clicked.

For instance, “Security > Users” shall mean: click the link named “Security” and then click the link named “Users”.

---

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Chapter 2 - **General website conventions**

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<td>Saved changes have an immediate effect</td>
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</table>
Section A - Search forms

Introduction

Search forms are used to locate items by applying search terms and search filters to narrow the results.

The following screenshot shows a typical search form. The functional areas of the search form are circled; they are explained in more detail later in this section.
Search results sort functions

Overview

The search results sort functions enable the user to reorder the search results. Search results can be sorted in ascending or descending order by clicking the column header label. The ▲ icon indicates that the results are shown in ascending order. The ▼ icon indicates that the results are shown in descending order.

In this screenshot, the results are shown in ascending order:

![Ascending Sort Example]

In this screenshot, the results are shown in descending order:

![Descending Sort Example]
Filtering search results using search filters

Overview
When applied to search results, search filters constrain the search results to contain only those results that match the search filter. Follow these steps to apply a search filter:

1) Enter a search term into one or more textboxes that appear immediately beneath each column header;
2) Or select an option from one or more of the drop downs immediately beneath each column header.
3) Click the Search button to apply the search filters (i.e. execute the search).

Notes:
❖ Search filters are cumulative. The search results will contain only those results that match the search terms of all the search filters specified.

Search filters are case insensitive.
Search filter field types

Overview

Search filter types control the way in which a search filter matches results.

The following table describes the available search filter field types and how to use them.

The table below refers to the following screenshot:

```
<table>
<thead>
<tr>
<th>Filter field type</th>
<th>Field</th>
<th>Example</th>
<th>Description</th>
</tr>
</thead>
</table>
| Free-text box     | Agency| ![Agency](image) | • Specify a search term by typing it into the box.  
• The match type is indicated by the italicized text that appears in the box before a search term has been entered. (“Exactly…” in the example shown) |
| Single-select drop down | Status | ![Status](image) | • To activate the drop down, click on it. The example drop down is activated.  
• Specify a search term by clicking on the desired search term to select it.  
• The match type is always “exactly”. |
<table>
<thead>
<tr>
<th>Date selector (calendar)</th>
<th>Date selector (calendar)</th>
<th>Date selector (calendar)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Date</td>
<td>Date</td>
</tr>
<tr>
<td>[Calendar Image]</td>
<td>[Calendar Image]</td>
<td>[Calendar Image]</td>
</tr>
</tbody>
</table>

- Activate the calendar by clicking on the icon to the right of the box.
- Change the month by clicking on the paging arrows. The arrows function in the same manner as those described in the [Search results paging functions](#) section of this document.
- Select a date by clicking on the number of the day of the month.
- The match type is always “on or after”.

<table>
<thead>
<tr>
<th>Time selector</th>
<th>Time selector</th>
<th>Time selector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time</td>
<td>Time</td>
<td>Time</td>
</tr>
<tr>
<td>[Time Image]</td>
<td>[Time Image]</td>
<td>[Time Image]</td>
</tr>
</tbody>
</table>

- Activate the time selector by clicking on the icon to the right of the box.
- Select a time by clicking on it in the list.
- The match type is always “on or after”.

---

---
## Search filter match types

### Overview
The following table describes the search filter match types that are available.

<table>
<thead>
<tr>
<th>Match type</th>
<th>How the filter type is applied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contains</td>
<td>Finds results where the specified field “contains” the search term entered.</td>
</tr>
<tr>
<td></td>
<td>For example, if search field “first name” used the “contains” match filter, then the search result “Taylor” would be matched by search terms “tay” or “ylor” but would not be matched by the search term “smi”.</td>
</tr>
<tr>
<td>Starts with</td>
<td>Finds results where the specified field “starts with” the search term entered.</td>
</tr>
<tr>
<td></td>
<td>For example, if search field “first name” used the “starts with” match filter, then the search result “Taylor” would be matched by search terms “ta” or “tay” but would not be matched by the search term “lor”.</td>
</tr>
<tr>
<td>Ends with</td>
<td>Finds results where the specified field “ends with” the search term entered.</td>
</tr>
<tr>
<td></td>
<td>For example, if search field “first name” used the “ends with” match filter, then the search result “Taylor” would be matched by search terms “lor” or “aylor” but would not be matched by the search term “tay”.</td>
</tr>
<tr>
<td>Exactly</td>
<td>Finds results where the specified field matches “exactly” the search term entered.</td>
</tr>
<tr>
<td></td>
<td>For example, if search field “first name” used the “exactly” match filter, then the search result “Taylor” would be matched by search term “taylor” but would not be matched by the search terms “tay”, “lor” or “smith”.</td>
</tr>
<tr>
<td>On Or After (OOA)</td>
<td>This match type applies only to search filters that use a date and/or time.</td>
</tr>
<tr>
<td></td>
<td>Finds results where the specified field’s date is “on or after” the search term entered.</td>
</tr>
<tr>
<td></td>
<td>For example, if search field “Appointment starts at” used the “on or after” match filter, then:</td>
</tr>
<tr>
<td></td>
<td>• The search result “12/11/2013” would be matched by search terms “12/10/2013” or “12/11/2013” but would not be matched by the search term “12/12/2013”.</td>
</tr>
<tr>
<td></td>
<td>• The search result “12/11/2013 1:30 PM” would be matched by search terms “12/10/2013 9:00 AM” or “12/11/2013 1:30 PM” but would not be matched by the search term “12/11/2013 2:00 PM” or “12/12/2013 9:00 AM”.</td>
</tr>
</tbody>
</table>
Search results

Overview

The search results show the items that matched the search terms entered. Each results row has a column whose text is a link that can be clicked and which will take the user to a web page describing the detail of the item clicked.

In the following screenshot, the clickable links are circled in green.
Search results paging functions

Overview

When the results of a search contain more results than can be displayed at one time, search results paging buttons and fields (features) give the user the ability to see the next and previous results. The paging features are always displayed beneath the search results.

The following table describes each button’s purpose:

<table>
<thead>
<tr>
<th>Button</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Next Page" /></td>
<td>Clicking this button advances to the next page of results.</td>
</tr>
<tr>
<td><img src="image" alt="Previous Page" /></td>
<td>Clicking this button returns to the previous page of results.</td>
</tr>
<tr>
<td><img src="image" alt="Last Page" /></td>
<td>Clicking this button advances to the last page of results.</td>
</tr>
<tr>
<td><img src="image" alt="First Page" /></td>
<td>Clicking this button returns to the first page of results.</td>
</tr>
<tr>
<td><img src="image" alt="Page Numbers" /></td>
<td>Clicking a number advances to the results on a particular page.</td>
</tr>
<tr>
<td><img src="image" alt="Ellipses" /></td>
<td>The ellipses (i.e. the 3 dots “...” circled in green) indicates that there are additional pages of results. Clicking the ellipses shows the numbers for the next set of results pages.</td>
</tr>
<tr>
<td><img src="image" alt="Page Size" /></td>
<td>Typing a number into the box and clicking “Go” advances to that page of results.</td>
</tr>
<tr>
<td><img src="image" alt="Change Page Size" /></td>
<td>Typing a number into the box and clicking “Change” alters the number of results that are displayed on each results page.</td>
</tr>
<tr>
<td><img src="image" alt="Results Count" /></td>
<td>Indicates the relative number of the results displayed (i.e. “1 to 50”) and number of results available (i.e. “of 670”).</td>
</tr>
<tr>
<td><img src="image" alt="Page Number" /></td>
<td>The number surrounded by a lightly colored box and a black background (circled in green) indicates the results page number currently displayed.</td>
</tr>
</tbody>
</table>
Section B - Calendar-based pages

Overview

Pages such as the Effective Schedule and Rolling Schedule edit page have a calendar with which the user can interact to view and manipulate data.

The following screenshot shows a typical page with a calendar. The functional areas of the page are circled; they are explained in more detail later in this section.
The legend

| Overview | The legend depicts symbols that the user can expect to see on the page. In some browsers, hovering the mouse over a symbol will display a message which describes the symbol’s meaning (not pictured). Each symbol’s meaning on a given page is described on that page’s section within this document. | Words |
## Calendar navigation

### Overview

The calendar navigation provides a means to change the dates or times displayed on the calendar. Some navigation elements are not available on some pages or contexts.

<table>
<thead>
<tr>
<th>Button</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Previous Button" /> <img src="image" alt="Next Button" /></td>
<td>Clicking the button changes the start date of the calendar to be seven (7) days earlier. For example, if the date currently showing is December 22 then clicking the button once would change the start date to December 15.</td>
</tr>
<tr>
<td></td>
<td>Clicking the button changes the start date of the calendar to be seven (7) days later. For example, if the date currently showing is December 22 then clicking the button once would change the start date to December 29.</td>
</tr>
<tr>
<td><img src="image" alt="Today Button" /></td>
<td>Clicking link changes the start date of the calendar to today’s date.</td>
</tr>
<tr>
<td><img src="image" alt="Mini Calendar Button" /></td>
<td>Clicking the button causes a mini-calendar to be shown. Clicking a day on the mini-calendar changes the main calendar’s start date to be the prior Sunday on the week of the day clicked. In the example to the left, if the user clicked on December 18th then the start date of the main calendar would be set to December 15. Clicking on the name of the month causes a list of months and years to be shown (not pictured). Select a month and year by clicking on them and then clicking OK to cause the main calendar to change to that date.</td>
</tr>
<tr>
<td><img src="image" alt="Month Arrows Button" /></td>
<td>Clicking on the arrows pictured here changes the main calendar start date to increase or decrease by a month.</td>
</tr>
<tr>
<td><img src="image" alt="Month Button" /></td>
<td>Clicking on the Day button changes the calendar to display a single day at a time.</td>
</tr>
<tr>
<td><img src="image" alt="Month Button" /></td>
<td>Clicking the Week button changes the calendar to display a week at a time. This is the default setting.</td>
</tr>
<tr>
<td><img src="image" alt="Month Button" /></td>
<td>Clicking the Month button changes the calendar to display a month at a time.</td>
</tr>
<tr>
<td><img src="image" alt="Day &amp; Date Link Button" /></td>
<td>Clicking on a the day &amp; date link changes the calendar to display that single day’s data.</td>
</tr>
</tbody>
</table>
Clicking this link changes the calendar to display timeslots for all 24 hours in a day. Once clicked, its text change to read “Show business hours…”; clicking the link in this state changes the calendar to display only timeslots for typical business hours.
Calendar

Overview
The calendar shows the timeslots for each date and time in the current view. For example, in the default weekly view, the calendar shows all timeslots during typical business hours from Sunday through Saturday.

Timeslots may be empty or contain an appointment block. When a timeslot is empty, there is no capacity for appointments at that time. When a timeslot contains an appointment block, the block illustrates the current availability of appointment capacity in that timeslot.

To understand the specific meanings of each appointment block, please refer to the page-specific instructions for the relevant page.

Interacting with appointment blocks
Some pages may allow the user to interact with appointment blocks by either double-clicking or right-clicking on them with the mouse.

To understand the specific actions that a user may take with an appointment block, please refer to the page-specific instructions for the relevant page.
Timeline

Overview

A blue line which is placed at the boundary between the end of the agency’s current timeslot and the beginning of its next timeslot (ex: between 8:59 AM and 9:00 AM). The time is represented in the agency’s own time zone. For example, if the agency is in the Pacific Time zone then the line represents the actual time in the Pacific Time zone. The time line is not affected by the interactive-user’s own time zone.
Section C – Other conventions

Form Validation Errors

Overview

The website will notify the user when they attempt to submit invalid data. Notifications of this nature are called form validation error(s). In the example below, the form validation error is circled in green and indicates that the Login name field does not meet the field length requirements.

When a form validation error is displayed, the user should correct the error(s) and retry the submission.
The “History” tab

Overview

Pages which allow the user to edit things such as users, appointments, and roles, will include a History tab. The tab contains information regarding the date and time that the item was created and the date on which it was last updated.

The following table describes the meaning of the fields shown in the screenshot above:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created by</td>
<td>The CAS account which was used to create the item.</td>
</tr>
<tr>
<td>Created on</td>
<td>The date and time on which the item was created. The time is adjusted to the time zone of the interactive user.</td>
</tr>
<tr>
<td>Modified by</td>
<td>The CAS account which was used to most recently modify the item.</td>
</tr>
<tr>
<td>Modified on</td>
<td>The date and time on which the item was most recently modified. The time is adjusted to the time zone of the interactive user.</td>
</tr>
</tbody>
</table>
Saved changes have an immediate effect

Overview

Except where noted in this document, changes to any item will take effect immediately. For example, disabling a user’s account will take effect immediately.
## Chapter 3 - Accessing CAS

### Contents

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<th>Topic</th>
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<td>Access requirements</td>
<td>3–2</td>
</tr>
<tr>
<td></td>
<td>Left navigation menu</td>
<td>3–5</td>
</tr>
</tbody>
</table>
# Access requirements

Users must meet the following requirements in order to access the CAS website.

<table>
<thead>
<tr>
<th>Must have Internet access</th>
<th>Users must have access to the Internet in order to access CAS.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Must have an active CAS account</td>
<td>Users must have an active CAS user account in order to access CAS. See <a href="#">Creating Users</a> for information about creating users.</td>
</tr>
</tbody>
</table>
| Computer Operating System (OS) compatibility | CAS is designed and tested to function with the following operating systems:  
  - Windows XP  
  - Windows 7  
  Other operating systems are not supported. |
| Internet browser compatibility | CAS is designed and tested to function with only the following internet browsers:  
  - Google Chrome  
  - Internet Explorer 7  
  - Internet Explorer 8  
  - Internet Explorer 9  
  - Internet Explorer 10  
  Other browsers are not supported. |
| Google Chrome is the recommended internet browser | For the best and fastest experience it is recommended that users use the Chrome internet browser.  
  ![Google Chrome](#) |
CAS is hosted in multiple environments and is accessed using different addresses depending on the environment. Using an approved Internet browser, enter the address for the appropriate environment in the browser’s address bar:

<table>
<thead>
<tr>
<th>Environment</th>
<th>Description</th>
<th>Location</th>
<th>Website address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peckham Test</td>
<td>For Peckham testing only.</td>
<td>Internet accessible (resident in the Peckham Secure Enclave)</td>
<td><a href="https://castestadmin.peckham.org">https://castestadmin.pec kham.org</a></td>
</tr>
<tr>
<td>Production</td>
<td>The Peckham Production environment.</td>
<td>Internet accessible (resident in the Peckham Secure Enclave)</td>
<td><a href="https://casadmin.peckham.org">https://casadmin.peckha m.org</a></td>
</tr>
</tbody>
</table>

The CAS website is secure. That is, the website address starts with “https” which indicates that all network traffic between the end-user and the web servers is encrypted. When typing the address into the browser, don’t forget to include the “s” in “https”.
**Login Required**  
The user is required to enter valid credentials for a user that meets the access requirements in order to enter the website.

In Internet Explorer, the screen in which to enter credentials looks like this:

![Windows Security login screen](image)

Ensure that you provide the Peckham-Enclave domain when supplying your user name. Example: Peckham-Enclave\username

Password format is as follows:
- They must not contain the user's account name or parts of the user's full name that exceed two consecutive characters.
- They must be at least 14 characters long.
- They must contain characters from three of the following four categories:
  - English uppercase characters (A through Z)
  - English lowercase characters (a through z)
  - Base-10 digits (0 through 9)
  - Non-alphabetic characters (for example, !, $, #, %)

**Logging out**  
To log out of the website, simply close the internet browser.
Left navigation menu

Overview

The left navigation (or “left nav”) is a menu that appears on the left side of all pages. The left nav contains links to pages in the website. Clicking a link causes the interactive user to be redirected to the function named by the link. The roles to which the interactive user belongs govern the links that appear in the left nav.

Figure: circled in green, the left navigation that a System Administrator would see.
Chapter 4 - Roles and permissions

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<td>Assigning role permissions</td>
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</tr>
<tr>
<td>Finding roles (role search)</td>
<td>4–8</td>
</tr>
</tbody>
</table>
## Users, roles & permissions

<table>
<thead>
<tr>
<th>Users are assigned to roles (permissions are not assigned to users)</th>
<th>Every CAS user is assigned to a role. Each role is assigned a set of permissions and each permission governs access to a particular website function. Thus, roles grant access to website functions when users are a member of the role. Roles are defined by System Administrators and roles are generally named for the job function that they represent (ex: agency administrator).</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency-level roles</td>
<td>An agency-level role grants permissions to a user for that agency. Users can be assigned to one or more agency-level roles for a given agency. Users can be assigned a given agency-level role in one or more agencies.</td>
</tr>
<tr>
<td>Region-level roles</td>
<td>A region-level role grants permissions to a user for agencies in that region. Users can be assigned to one or more region-level roles for a given region. Users can be assigned a given region-level role in one or more regions.</td>
</tr>
<tr>
<td>System-level roles</td>
<td>A system-level role grants permissions to a user for all agencies (in other words, system-wide).</td>
</tr>
</tbody>
</table>
The permissions that a user inherits from its role memberships are cumulative. In other words, the user is granted all permissions from all roles to which they are a member.

For example, if a user is a member of the Agency Coordinator and Receptionist role for the same agency, the user inherits all permissions from both roles for that agency.

For example, if a user is a member of the Receptionist role at Agency A and is also a member of the Agency Administrator role at Agency B, the user inherits “Receptionist” permissions for Agency A and “Agency Administrator” permissions for Agency B. Note, however, that this does not imply that the user inherits “Agency Administrator” permissions for Agency A nor does the user inherit “Receptionist” permissions for Agency B.

For example, if a user is a member of the Receptionist role at Agency A and is also a member of the System Administrator system-level role, the user inherits “Receptionist” permissions for Agency A and the “System Administrator” permissions for all agencies.

See section Assigning agency memberships for a practical example.
Creating roles

Overview

Follow these steps to create a new role:

1) In the left navigation, click Security > Roles. The Role search page will appear.

2) Click the [New] link. A blank Create Role form will be displayed as shown in the following figure:

3) On the General tab, fill in the form fields.

<table>
<thead>
<tr>
<th>Field name</th>
<th>Data type</th>
<th>Min length</th>
<th>Max length</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role name</td>
<td>Text</td>
<td>5</td>
<td>50</td>
<td>Yes</td>
<td>The name of the role.</td>
</tr>
<tr>
<td>Access level</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Yes</td>
<td>The role’s access level. Select a value from the drop down.</td>
</tr>
</tbody>
</table>

4) On the Permissions tab, assign one or more permissions to the role. (See Assigning role permissions.)

To create the new role, click the Save button. To abandon it, click the Cancel button.
Editing roles

Overview
Follow these steps to edit a user:
1) In the left navigation, click Security > Roles. The Role search page will be displayed.
2) Find the role to edit by using the role search form. See more information about the role search, see Finding roles (role search).
3) In the search results, clicking on the name of the role to edit. The Role Edit page will be displayed.
4) Edit the role by altering the values in the form fields. For more information about the nature of the form fields, see Creating roles.
5) Click the Save button to submit the changes. To abandon changes, click the Cancel button.
Deleting roles

Overview

Follow these steps to delete a role:
1) Follow the instructions in Editing roles to find the Role Edit page.
2) Click the Delete tab to activate it.
3) Click the Delete button to delete the role. A warning will indicate that deleting a role removes all users from the role and then deletes the role.
4) Click OK to commit the changes. To abandon the operation and not delete the role, click Cancel.

Notes:
- Deleting a role cannot be undone.
- Deleting a role removes all users from the role.
Assigning role permissions

Overview

The role create and edit pages include a Permissions tab which enables the user to configure the permissions assigned to a particular role. For convenience, permissions are organized into functional groups.

Follow these steps to assign agency memberships:

1) Click on the Permissions tab to activate it.
2) For each permission to assign to the role, click the checkbox to the left of the permission’s name. The permission is selected when a check mark appears in the box.

The following screenshot shows that the “Check customers in & out of appointments” and “Create overflow appointments” permissions are selected and that the “Create regular appointments” and “Create special case appointments” permissions are not.
Finding roles (role search)

Overview

Follow these steps to find a role:
1) In the left navigation, click **Security > Roles**. The Role Search page will appear.
2) Search for a role by entering one or more search filters and clicking the **Search** button. For more information regarding the use of search forms, see **Search forms**.

Click a role’s name to edit it.

The role search page offers the following search filters:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Data type</th>
<th>Max length</th>
<th>Match type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role name</td>
<td>Text</td>
<td>50</td>
<td>Contains</td>
<td>The role’s name</td>
</tr>
<tr>
<td>Access level</td>
<td>-</td>
<td>-</td>
<td>Exact</td>
<td>The role’s access level. Select an item from the list in order to filter by it.</td>
</tr>
</tbody>
</table>
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<td>5–12</td>
</tr>
<tr>
<td>Finding users (user search)</td>
<td>5–14</td>
</tr>
</tbody>
</table>
CAS User Accounts in Peckham Secure Enclave

Overview

CAS is hosted in the Peckham Secure Enclave hosting environment (PSE), and every user of CAS must have an account in the Peckham Secure Enclave’s Active Directory. CAS accounts in the Peckham Secure Enclave have the following characteristics:

- Each account is prefixed with the domain name PECKHAM-ENCLAVE.
- Every attempt has been made to make the users CAS login name match their CA login name. In some cases, however, this alignment may not be possible, and the user will have a CAS account login different from their CA login.
- When logging into the system users must use the full login including domain name as in the following example: PECKHAM-ENCLAVE\SmithWK)
- A PSE account password expires every 60 days and must be changed before expiration, or the account is automatically locked. An agency administrator or system administrator may unlock the account by resetting the password (see Changing a password).

PSE account passwords have the following requirements:

- They must not contain the user's account name or parts of the user's full name that exceed two consecutive characters.
- They must be at least 14 characters long.
- They must contain characters from three of the following four categories:
  - English uppercase characters (A through Z)
  - English lowercase characters (a through z)
  - Base-10 digits (0 through 9)
  - Non-alphabetic characters (for example, !, $, #, %)
Creating users

Overview

Follow these steps to create a new user:

1) In the left navigation, click Security > Users. The User Search page will appear.

2) Click the New link. A blank user form will appear:

3) On the General tab, fill in the form fields.
<table>
<thead>
<tr>
<th>Field name</th>
<th>Min / length</th>
<th>Max / length</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First name</td>
<td>2</td>
<td>50</td>
<td>Yes</td>
<td>The user’s first name.</td>
</tr>
<tr>
<td>Last name</td>
<td>2</td>
<td>50</td>
<td>Yes</td>
<td>The user’s last name.</td>
</tr>
<tr>
<td>Login name</td>
<td>5</td>
<td>50</td>
<td>Yes</td>
<td>The user’s Active Directory domain and user name, in the format “domain\username”. Ex: peckham-enclave\LastnameF</td>
</tr>
<tr>
<td>Time zone</td>
<td>-</td>
<td>-</td>
<td>Yes</td>
<td>The time zone that the user is in. Hint: as a convenience, the website uses this setting to automatically display “created on” and “modified on” date and times in the user’s own time zone.</td>
</tr>
<tr>
<td>Enabled</td>
<td>-</td>
<td>-</td>
<td>Yes</td>
<td>When checked, the user’s account is enabled and the user will be permitted to access the website. When unchecked, the user will not be able to access the website.</td>
</tr>
<tr>
<td>Expires on</td>
<td>-</td>
<td>-</td>
<td>Yes</td>
<td>When set, the date and time upon which the user’s account will automatically expire. The date and time is relative to the user’s own time zone. When a user’s account is expired, they will not be able to access the website. This setting supersedes the “Enabled” setting.</td>
</tr>
<tr>
<td>Password</td>
<td>14</td>
<td>50</td>
<td>Yes</td>
<td>The password must be a minimum of 14 characters and must contain at least 3 of the following: upper case letters, lower case letters, numbers and punctuation.</td>
</tr>
<tr>
<td>Confirm password</td>
<td>14</td>
<td>50</td>
<td>Yes</td>
<td>Must match what was typed in Password field.</td>
</tr>
</tbody>
</table>

4) On the Agency memberships tab, assign the user to one or more agencies. (See Assigning agency memberships for more information.)
5) On the Role memberships tab, assign the user to one or more roles. (See Assigning role memberships for more information.)
6) On the Region memberships tab, if applicable, assign the user to one or more regions. (See Assigning region memberships for more information.)

To finalize and create the user, click the Save button. To abandon the new user, click the Cancel button.
Editing users

Overview

Follow these steps to edit a user:

1) In the left navigation, click **Security > Users**. The User Search page will appear.
2) Find the user to edit by using the user search form. For more information about the user search, see [Finding users (user search)](#).
3) In the search results, click on the Login Name of the user to edit. The User Edit page will appear.
4) Edit the user by altering the existing values in the form fields. For more information about the nature of the form fields, see [Creating users](#).
5) To finalize and update the user’s account, click the **Save** button. To abandon changes, click the **Cancel** button.
Changing a password (mandatory every 60 days)

Overview

Any CAS user can change their own password by navigating to Help > Change my password in the left menu. The Change my password page will appear. On this page, enters their new password and confirms it. For password requirements, see Creating users.

Note: the system will warn users when they first login to the system when their password expiration date is near. The number of days before expiration will be indicated, and the user will be automatically taken to the Change Password page.

As an administrator, follow these steps to change a user’s password:

1) Follow the instructions to get to the Edit user page. For more information, see Editing users.
2) On the Change password tab, type in the new password. For password requirements, see Creating users.
3) To finalize changing the password, click the Save button. To abandon changes and not update the user, click the Cancel button.
Disabling users

Overview
Follow these steps to disable a user:
1) Follow the instructions to get to the Edit user page. For more information, see Editing users.
2) On the General tab, there are two ways to disable a user account: the “Enabled” checkbox and the “Expires on” date. For more information about the nature of those fields, see Creating users.
3) To finalize changes and update the user, click the Save button. To abandon changes and not update the user, click the Cancel button.

Notes:
❖ Disabling a user’s account prevents them from accessing the website.
Deleting users

Overview

Follow these steps to delete a user:
1) Follow the instructions to get to the Edit user page. See Editing users for more information.
2) Click the Delete tab to activate it.
3) Click the Delete button to delete the role. A warning will indicate that deleting a role removes all users from the role and then deletes the role.
4) Click OK to continue to delete the user. To abandon the operation and not delete the role, click Cancel.

Notes:
- Deleting a role cannot be undone.
- Deleting a role removes all users from the role.
- One cannot delete users whose account has been used to create or edit other items (ex: appointments, rolling schedules, other users etc.). Instead of deleting an account, it should be disabled; see Disabling users for more information.
Assigning agency memberships

Overview

The user create and edit pages have an Agency memberships tab which enables the user to configure the agencies to which the user being created/edited is assigned.

The tab will be visible only to those interactive users which are a member of a role which includes the Manage user agencies permission.

- When the interactive user is a member of a system-level role which includes that permission then the interactive user shall be able to grant the user being created/edited an agency membership to any agency.
- When the interactive user is a member of a region-level role which includes that permission then the interactive user shall be able to grant the user being created/edited an agency membership to any agency in that region.
- When the interactive user is a member of an agency-level role which includes that permission then the interactive user shall be able to grant the user being created/edited an agency membership to that agency.

To assign agency memberships:

1) Click on the Agency memberships tab to activate it.

2) For each agency to which to grant membership, click the checkbox to the left of the agency’s name. An agency is selected when a check mark appears in its corresponding checkbox.

The following screenshot shows contents of the Agency memberships tab. In this example, the user is assigned to the Boston and Colorado agencies.
### Agency memberships

Using the checkboxes below, select the agencies in which the user is a member. You may only edit agency memberships for those agencies in which you are permitted to manage agency memberships. Agency memberships must first be added and saved in order to edit the user’s role(s) within an agency.

<table>
<thead>
<tr>
<th>Agency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arkansas Passport Center</td>
</tr>
<tr>
<td>Atlanta</td>
</tr>
<tr>
<td>Boston</td>
</tr>
<tr>
<td>Buffalo</td>
</tr>
<tr>
<td>Chicago</td>
</tr>
<tr>
<td>Colorado</td>
</tr>
<tr>
<td>Connecticut</td>
</tr>
<tr>
<td>Dallas</td>
</tr>
<tr>
<td>Detroit</td>
</tr>
</tbody>
</table>
Assigning region memberships

Overview

The user create and edit pages include a Region memberships tab which enables the user to configure the regions to which the user being created/edited is assigned to for a given agency or system-wide.

The tab will be visible only to those interactive users which are a member of a role which includes the Manage user regions permission.

- When the interactive user is a member of a system-level role which includes that permission then the interactive user shall be able to grant the user being created/edited a membership to any region.
- When the interactive user is a member of a region-level role which includes that permission then the interactive user shall be able to grant the user being created/edited membership to that region.

To assign region memberships:

1) Click on the Region memberships tab to activate it.
2) For each region to which to grant membership, click the checkbox to the left of the region’s name. A region is selected when a check mark appears in its corresponding checkbox.

The following screenshot shows contents of the Region memberships tab. In this example, the user is assigned to the Northeast Region.
Assigning role memberships

Overview

The user create and edit pages include a Role memberships tab which enables the user to configure user assigned roles (for a given agency, a given region, or system-wide).

The tab will be visible only to those interactive users which are a member of a role which includes the Manage user roles permission.

- When the interactive user is a member of a system-level role which includes that permission then the interactive user shall be able to grant any user being created/edited a role(s).
- When the interactive user is a member of an region-level role which includes that permission then the interactive user shall be able to grant the user being created/edited a role(s) for any agency in that region.
- When the interactive user is a member of an agency-level role which includes that permission then the interactive user shall be able to grant the user being created/edited a role(s) for that agency.

Notes:

- The user must be a member of an agency before assigning them a role in that agency.
- The user must be a member of a region before assigning them a role in that region.

To assign role memberships:

1) Click on the Role memberships tab to activate it.
2) For each agency to which to grant a role membership, click the checkbox to the left of the role’s name. The role is selected when a check mark appears in the checkbox.
3) Repeat the previous step for each region in which to grant a role membership.

The following screenshot shows the contents of the Role memberships tab. In this example, the user is assigned to the View Only role in the Boston agency, to the Agency coordinator role in the Colorado agency, the Regional Agency Administrator role in the Northeast Region, and to the System administrator role at the system level.
**Role memberships**

Using the checkboxes below, select the roles that the user serves in each agency. You may only edit agency role memberships for those agencies in which you are permitted to manage agency roles. Agency memberships must first be added and saved in order to edit the user’s role(s) within an agency.

**Agency**

- **Boston**
  - Role
  - Agency administrator
  - Agency coordinator
  - Receptionist
  - View only

- **Colorado**
  - Role
  - Agency administrator
  - Agency coordinator
  - Receptionist
  - View only

**Region**

- **Northeast Region**
  - Role
  - Regional Agency Administrator

**System**

- **System**
  - Role
  - Duty officer
  - Help desk local coordinator
  - IT access - user account
  - System administrator
Finding users (user search)

Overview

Follow these steps to find a user:

1) In the left navigation, click **Security > Users**. The User Search page will appear.

2) For a user arriving at the page for the first time, all users, sorted by first name in ascending order will be shown.

3) Search for a user by entering one or more search filters and clicking the **Search** button. For more information regarding the use of search forms, see Search forms.

4) Click a user’s Login Name to edit it.
Search filters  The user search page offers the following search filters:

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<thead>
<tr>
<th>Search filter</th>
<th>Filter field type</th>
<th>Max length</th>
<th>Match type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Login name</td>
<td>Free-form textbox</td>
<td>50</td>
<td>Contain</td>
<td>The user’s login name.</td>
</tr>
<tr>
<td>First name</td>
<td>Free-form textbox</td>
<td>50</td>
<td>Starts-with</td>
<td>The user’s first name.</td>
</tr>
<tr>
<td>Last name</td>
<td>Free-form textbox</td>
<td>50</td>
<td>Starts-with</td>
<td>The user’s last name.</td>
</tr>
<tr>
<td>Enabled</td>
<td>Single-select drop down</td>
<td>-</td>
<td>Exact</td>
<td>Whether the user’s account is enabled. “Yes” finds users whose accounts are enabled. “No” finds users whose accounts are disabled. “All” causes the filter to be ignored.</td>
</tr>
<tr>
<td>Region membership</td>
<td>Single-select drop down</td>
<td>-</td>
<td>Exact</td>
<td>The user’s region membership. Select an item from the list in order to filter by it.</td>
</tr>
<tr>
<td>Agency membership</td>
<td>Single-select drop down</td>
<td>-</td>
<td>Exact</td>
<td>The user’s agency membership. Select an item from the list in order to filter by it.</td>
</tr>
<tr>
<td>Role membership</td>
<td>Single-select drop down</td>
<td>-</td>
<td>Exact</td>
<td>The user’s role membership. Select an item from the list in order to filter by it.</td>
</tr>
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Chapter 6 - Agency Administration

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Creating agencies

Overview

Creating a new agency happens rarely. Only those users that are a member of a role which has the permission to create agencies may actually do so.

To create an agency:

1) In the left navigation, click **Agency search**.

2) Click the **+ New** link. A blank agency form will appear:

![Agency New Form]

3) On the **General** tab, fill in the form fields.
<table>
<thead>
<tr>
<th>Field name</th>
<th>Data type</th>
<th>Min length</th>
<th>Max length</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency name</td>
<td>Text</td>
<td>5</td>
<td>100</td>
<td>Yes</td>
<td>The agency’s full name.</td>
</tr>
<tr>
<td>Agency short name</td>
<td>Text</td>
<td>2</td>
<td>3</td>
<td>Yes</td>
<td>A 2-3 character short name or code that identifies the agency. This code must be unique.</td>
</tr>
<tr>
<td>Time zone</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Yes</td>
<td>The time zone in which this agency resides. Select a value from the list.</td>
</tr>
<tr>
<td>Region</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Yes</td>
<td>The region to which the agency belongs. Select a value from the list.</td>
</tr>
<tr>
<td>Agency enabled</td>
<td>True/False</td>
<td>-</td>
<td>-</td>
<td>Yes</td>
<td>Whether the agency is enabled.</td>
</tr>
<tr>
<td>IVR agency ID</td>
<td>Integer</td>
<td>1</td>
<td>10000</td>
<td>Yes</td>
<td>An identifier that the AT&amp;T IVR uses to identify the agency. Note: this value should not be changed except by IT staff! Changing it could cause the AT&amp;T IVR to be unable to make appointments at the agency.</td>
</tr>
<tr>
<td>Appointments within days</td>
<td>Integer</td>
<td>1</td>
<td>365</td>
<td>Yes</td>
<td>The number of days of availability (including today) that are shown on the effective schedule and how far out appointments can be made. Changes to this setting will not delete existing appointments or cause appointment conflicts.</td>
</tr>
<tr>
<td>Requires proof of travel</td>
<td>True/False</td>
<td>-</td>
<td>-</td>
<td>Yes</td>
<td>Indicates that the agency requires customers to bring proof of travel to their appointment. This setting is only informational.</td>
</tr>
<tr>
<td>Travel within</td>
<td>Integer</td>
<td>1</td>
<td>365</td>
<td>Yes</td>
<td>Indicates that the agency requires that a customer must be travelling within this number of days (including today) in order to make an appointment. This setting is only informational.</td>
</tr>
<tr>
<td>Comments</td>
<td>Text</td>
<td>0</td>
<td>1000</td>
<td>No</td>
<td>Free-form comments.</td>
</tr>
</tbody>
</table>

4) To finalize and create the agency, click the **Save** button. To abandon
Editing agencies

Overview
To edit an agency:
1) In the left navigation, click Agency search.
2) Use the Agency search page to find the agency to edit. See Finding agencies (agency search) for more information.
3) In the search results, click the name of the agency to edit. The agency edit screen will appear.
4) To edit the agency, follow the instructions in Creating agencies beginning with step 3.
Disabling agencies

Overview

Only active agencies may accept appointments. Therefore disabling an agency prevents the creation of appointments at that agency.

Notes:

❖ CAUTION! Disabling an agency will not remove an agency from the AT&T IVR telephone announcement but it does cause IVR users to be unable to make appointments at the agency. To remove an agency from the AT&T IVR telephone announcement, please speak with a member of the IT staff so that they can coordinate the effort. Refer to Appendix A – Assistance Information for assistance information.

To disable an agency:
1) In the left navigation, click Agency search.
2) Use the Agency search page to find the agency to edit. See Finding agencies (agency search) for more information.
3) In the search results, click the name of the agency to edit. The agency edit screen will appear.
4) Remove the checkmark from the “Active” field by clicking on the checkmark.
5) To finalize the change and to deactivate the agency, click the Save button. To abandon the changes, click the Cancel button.
Finding agencies (agency search)

Overview

To find an agency:
1) In the left navigation, click **Agency search**. The Agency Search page will appear.
2) Search for an agency by entering one or more search filters and clicking the **Search** button. For more information regarding the use of search forms, see **Search forms**.
3) Click an agency’s name to edit it.

Search filters

The agency search page offers the following search filters:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Data type</th>
<th>Max length</th>
<th>Match type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency short name</td>
<td>Text</td>
<td>25</td>
<td>Exact</td>
<td>A 2-3 character short name or code that identifies the agency. This code is unique to each agency.</td>
</tr>
<tr>
<td>Agency name</td>
<td>Text</td>
<td>100</td>
<td>Starts-with</td>
<td>The agency’s full name.</td>
</tr>
<tr>
<td>Agency enabled</td>
<td>True/False</td>
<td>-</td>
<td>Exact</td>
<td>Whether the agency is enabled.</td>
</tr>
</tbody>
</table>
### Chapter 7 - Agency Schedule Administration

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</tr>
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<td></td>
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<td>7–10</td>
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<td></td>
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</tr>
<tr>
<td></td>
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Background information

Configuring appointment availability

An agency’s appointment availability is configured in two parts: rolling schedule and schedule exceptions. The result of combining the two is called the agency’s effective schedule. A rolling schedule and a schedule exception are represented as blocks of timeslots.

Appointments and schedules are in the agency’s time zone

The dates and times of all appointments are reserved in and displayed in the agency’s own time zone, no matter who creates them and no matter what time zone that user is in. Likewise, agency’s rolling schedules and schedule exceptions are always configured in and the effective schedule is always displayed in the agency’s own time zone.
Section A - Rolling schedules

Overview

A rolling schedule is an agency’s configured availability of appointments. It is configured on a Sunday-to-Saturday basis and which continues (or, rolls forward) indefinitely or until the rolling schedule’s end date. An agency may have one or more rolling schedules but only one may be in effect on a given date.

Notes:
- The rolling schedule is a calendar-based page. See Calendar-based pages for general information about such pages.
- It is recommended that an agency always have an open-ended rolling schedule (i.e. which has no end date) so that an agency’s effective schedule can always be calculated.
- Rolling schedules may not overlap. Before creating or editing a rolling schedule the user must verify that an existing rolling schedule does not occupy the same dates as the rolling schedule to be created or edited. If such overlap does exist, the user must modify it appropriately (to eliminate the overlap) before creating or editing the other rolling schedule.
Creating rolling schedules

Overview

Follow these steps to create a new rolling schedule:

1) If necessary, use the Agency search page to find the agency with which to work. See Finding agencies (agency search) for more information.

2) In the left navigation, click Agency > Rolling Schedules. The rolling schedule list page will appear.

3) Click the + New link. A blank rolling schedule form will appear:
4) On the *General* tab, fill in the form fields.

<table>
<thead>
<tr>
<th>Field name</th>
<th>Data type</th>
<th>Min / length</th>
<th>Max / length</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Text</td>
<td>2</td>
<td>100</td>
<td>Yes</td>
<td>The rolling schedule’s name.</td>
</tr>
<tr>
<td>Start date</td>
<td>Date</td>
<td></td>
<td></td>
<td>Yes</td>
<td>The date on which the rolling schedule becomes effective. “Starts on”.</td>
</tr>
<tr>
<td>End date</td>
<td>Date</td>
<td></td>
<td></td>
<td>No</td>
<td>The last date on which the rolling schedule is effective. “Ends on”. Leaving the end date blank makes the rolling schedule open-ended.</td>
</tr>
<tr>
<td>Description</td>
<td>Text</td>
<td>0</td>
<td>1000</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

To finalize and create the rolling schedule, click the **Save** button. To abandon the new schedule, click the **Cancel** button.
Overview

Follow these steps to edit a rolling schedule:

1) If necessary, use the Agency search page to find the agency with which to work. See Finding agencies (agency search) for more information.

2) In the left navigation, click Agency > Rolling Schedules. The Rolling Schedule list page will appear.

3) In the list of rolling schedules, click on the name of the rolling schedule to edit. The Rolling schedule Edit page will appear.

4) Edit the rolling schedule by altering the existing values in the form fields. For more information about the nature of the form fields, see Creating rolling schedules.

5) To add, to edit, or to remove appointment blocks, see Adding appointment blocks, Editing appointment blocks, and Deleting appointment blocks.

To changes to the rolling schedule, click the Save button. To abandon the changes, click the Cancel button.
Adding appointment blocks

Overview

Follow these instructions to add an appointment block to a rolling schedule:
1) Follow the instructions in Editing rolling schedules to get to the Schedule edit page.
2) Activate the Schedule tab by clicking on it.
3) Right-click or double click the timeslot which will be the start time for the appointment block.
4) The appointment block edit form will appear:
5) On the *General* tab, fill in the form fields.

<table>
<thead>
<tr>
<th>Field name</th>
<th>Data type</th>
<th>Min</th>
<th>Max</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment type</td>
<td>Text</td>
<td></td>
<td></td>
<td>Yes</td>
<td>The type of appointment for which to configure availability. Select a single value from a list of options. For more information about the types of appointments which appear in the drop down, see <a href="#">Appointment types</a>.</td>
</tr>
<tr>
<td>Name</td>
<td>Text</td>
<td>5</td>
<td>100</td>
<td>Yes</td>
<td>A name which describes the purpose of the timeslot. This name is only informational.</td>
</tr>
<tr>
<td>Appointment capacity</td>
<td>Integer</td>
<td>0</td>
<td>100</td>
<td>Yes</td>
<td>The number of appointments that are permitted in each timeslot of this appointment block.</td>
</tr>
<tr>
<td>Start time</td>
<td>Day &amp; time</td>
<td>12:00 AM</td>
<td>12:00 AM</td>
<td>Yes</td>
<td>The day of the week and time of day at which this timeslot becomes effective. When putting the cursor into the <em>Time</em> box, a list of typical business hours appears. Click on a time to select it. If the time desired does not appear in the list, it may be entered via the keyboard.</td>
</tr>
<tr>
<td>End date &amp; time</td>
<td>Day &amp; Time</td>
<td>12:00 AM</td>
<td>12:00 AM</td>
<td>Yes</td>
<td>The day of the week and time of day at which this timeslot’s effectiveness ends. When putting the cursor into the <em>Time</em> box, a list of typical business hours appears. Click on a time to select it. If the time desired does not appear in the list, it may be entered via the keyboard.</td>
</tr>
<tr>
<td>Description</td>
<td>Text</td>
<td>0</td>
<td>1000</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

6) To check whether the appointment block will create appointment conflicts, click the **Save** button. To abandon the changes, click the **Cancel** button. Clicking the Save button will show the appointment conflicts message popup.

7) If the change creates appointment conflicts, the appointment conflicts message popup will indicate a message similar to the following:
Editing appointment blocks

Overview

Follow these instructions to edit an appointment block of a rolling schedule:

1) Follow the instructions in Editing rolling schedules to get to the Schedule edit page.
2) Activate the Schedule tab by clicking on it.
3) Right-click or double click the appointment block to edit.

4) The appointment block edit form will appear.
5) To edit the appointment block, follow the instructions in Adding appointment blocks beginning with step 4.
Deleting appointment blocks

Overview

Follow these instructions to delete an appointment block of a rolling schedule:

1) Follow the instructions in Editing rolling schedules to get to the Schedule edit page.
2) Activate the Schedule tab by clicking on it.
3) Right-click or double click the appointment block to delete. The appointment block edit form will appear.
4) To check whether deleting the appointment block will create appointment conflicts, click the Delete button. The appointment conflicts message popup will be shown.
5) To complete the deletion of the appointment block, follow steps 8-11 in Adding appointment blocks.
6) After saving the changes to the appointment block the appointment block edit form will disappear and the regular schedule’s calendar will be refreshed reflecting the deletion.
Understanding the meaning of a rolling schedule bubble

Overview

A rolling schedule bubble represents an appointment block on the rolling schedule calendar. The following screenshot shows a “Regular” appointment type block Tuesday which starts at 7:30 AM, ends at 8:00 AM, and has a capacity of two.
Deleting or disabling rolling schedules

Overview

Notes:

❖ A rolling schedule may only be deleted if it has never been in effect. That is, its start date must be in the future.

❖ A rolling schedule that is currently in effect may not be disabled. To disable a rolling schedule that is currently in effect, first set its end date and create a new rolling schedule that starts the day afterwards. Once the rolling schedule is no longer in effect return to the rolling schedule edit page to disable it. Creating a new rolling schedule to replace the disabled one is not required but it ensures that there will be no gaps in the schedule.

Follow the following instructions to delete or to disable a rolling schedule:

1) Follow the instructions in Editing rolling schedules to get to the Schedule edit page.

2) Activate the Disable/Delete tab by clicking on it.

If the rolling schedule meets the requirements necessary to delete or disable it, click the Delete or Disable button.
Section B - Schedule exceptions

Overview

Schedule exceptions are appointment blocks which configure ad hoc alterations to a rolling schedule at a particular date and time. For example, typically appointments are not accepted on New Year’s Day. In that event, an exception would be made on that day to reduce all timeslot capacity to 0 for that day. Another example is an agency staff meeting between 9:30 AM - 10:00 AM for which capacity is again reduced to 0 to allow all staff to participate in the meeting. Another example is when the agency manager chooses to increase capacity to handle an anticipated influx of customers on a given day.

Notes:

❖ The rolling schedule is a calendar-based page. See Calendar-based pages for general information about such pages.
Schedule exception types

Overview

The following types of schedule exceptions are available:

<table>
<thead>
<tr>
<th>Exception type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Block all appointments</td>
<td>Sets the capacity to zero for all appointment type timeslots that share the same timeslot as the exception regardless whether a corresponding timeslot in the rolling schedule has an appointment block in it. An appointment block of this type will override all other blocks.</td>
</tr>
<tr>
<td>Change regular appointment capacity</td>
<td>Alters the capacity of regular appointment type timeslots configured in the rolling schedule which share the same timeslot as the exception. When the corresponding timeslot in the rolling schedule does not have an appointment block, the schedule exception adds availability to it.</td>
</tr>
<tr>
<td>Change overflow appointment capacity</td>
<td>Alters the capacity of overflow appointment type timeslots configured in the rolling schedule which share the same timeslot as the exception. When the corresponding timeslot in the rolling schedule does not have an appointment block, the schedule exception adds availability to it.</td>
</tr>
<tr>
<td>Change special case appointment capacity</td>
<td>Alters the capacity of special case appointment type timeslots configured in the rolling schedule which share the same timeslot as the exception. When the corresponding timeslot in the rolling schedule does not have an appointment block, the schedule exception adds availability to it.</td>
</tr>
</tbody>
</table>
Creating schedule exceptions

Overview

Follow these steps to create a new schedule exception:

1) Use the Agency search page to find an agency with which to work. See Finding agencies (agency search) for more information.

2) In the left navigation, click Agency > Schedule exceptions. The schedule exceptions calendar page shall appear as shown in the following screenshot:
3) Right-click or double click the timeslot for the appointment block start time.

4) The appointment block edit form will appear.

To create an appointment exception, follow the steps beginning with step 4 in Adding appointment blocks for a rolling schedule. The steps are the same except for that the appointment type dropdown will contain a list of schedule exception types from which to select. See Schedule exception types for more information.

Appointment conflicts message popup for creating schedule exceptions are the same as what is explained in steps 7-11 in Adding appointment blocks. As with adding appointment blocks, one of three possible popup messages related to appointment conflicts is displayed in creating schedule exceptions:

- Details on appointment conflicts are created,
- Whether this schedule exception fixes existing appointment conflicts,
- Or that the change does not create appointment conflicts.
Editing schedule exceptions

Overview

Follow these instructions to edit an appointment block of a rolling schedule:

1) If necessary, use the Agency search page to find an agency with which to work. See Finding agencies (agency search) for more information.

2) In the left navigation, click Agency > Schedule exceptions. The Schedule exceptions calendar page will appear.

3) Right-click or double click the appointment block to edit.

4) The appointment block edit form will appear.

5) To edit the appointment block, follow the instructions in Adding appointment blocks for rolling schedules, beginning with step 4.
Deleting schedule exceptions

Overview

Follow these instructions to delete a schedule exception:

1) If necessary, use the Agency search page to find an agency with which to work. See Finding agencies (agency search) for more information.

2) In the left navigation, click Agency > Schedule exceptions. The schedule exceptions calendar page will appear.

3) Follow the instructions in Deleting appointment blocks for rolling schedules, beginning with step 3.
Understanding the meaning of a schedule exception bubble

Overview
A schedule exception bubble represents an appointment block on the schedule exceptions calendar. The following screenshot, shows a “Change Overflow Capacity” block named “Change OF Cap” on Tuesday Jan 7, 2014 which starts at 7:30 AM, ends at 8:30 AM, and has a capacity of three (3). This schedule exception changes the capacity for this period to three.
Section C - Effective schedules

Overview
An effective schedule is an agency’s actual appointment capacity and availability. It is calculated by combining the agency’s rolling schedule, schedule exceptions, and reserved appointments. In other words, the effective schedule shows the total appointment capacity, how many appointments have been made and whether any appointment capacity remains.

Notes:
 The rolling schedule is a calendar-based page. See Calendar-based pages for general information about such pages.

Viewing the effective schedule

Overview
1) If necessary, use the Agency search page to find the agency with which to work. See Finding agencies (agency search) for more information.
2) In the left navigation, click Agency > Effective schedule. The Effective schedule calendar page will appear.
3) The calendar displayed illustrates the agency’s effective schedule.
The end of the agency’s current timeslot – the “time line"

Overview

The blue line which traverses the effective schedule from left to right and is placed at the boundary between the end of the agency’s current timeslot and the beginning of its next timeslot (ex: between 11:29 AM and 11:30 AM) is called the time line. The time line is represented in the agency’s own time zone. For example, if the agency is in the Pacific Time zone then the line represents the actual time in the Pacific Time zone. The time line is not affected by the interactive-user’s own time zone.

For example and in practice this means that when the agency’s actual time is anytime between 11:30 AM and 11:59 AM then the time line will indicate 12:00 PM.
Understanding the meaning of an effective schedule bubble

Overview
An effective schedule bubble indicates the number of confirmed appointments and the slot’s capacity. For example, on Mon Jan 6, 2014 in the following screenshot, the 8:30 AM timeslot has two confirmed appointments and a capacity of 25 Regular appointments (thus, “2/25” is shown in the bubble). The timeslot also indicates that two Special case appointments are available but zero have been confirmed (thus, a “0/2” is shown).

Appointment capacity is full
In the following screenshot, the 8:30 AM slot indicates that the appointment capacity is full. The effective schedule bubble indicates that the timeslot has a capacity of 30 Regular appointments and that there are 30 such confirmed appointments. Note also that the text of the appointment block is colored red; a visual cue that capacity is full.
Appointment conflicts exist

In the following screenshot, the 8:30 – 9:30 AM slots indicate that the appointment capacity is over full (i.e. appointment conflicts exist). The timeslots shown all have a capacity of zero Regular appointments but they have 25, 25, and 26 confirmed appointments. Note also that the text of the appointment blocks are colored red; a visual cue that capacity is full.
Interacting with the effective schedule calendar

To view the appointments in a timeslot:
1) Right-click a bubble in a timeslot.
2) In the menu that appears, click **View existing appointments**. The *Appointment search* page will appear.
3) Alternatively, a user may double click the bubble to cause the *Appointment search* page to appear.

**Notes:**
- When the *Appointment search* page appears it will have the date, time, and appointment type search filters preset to the values that correspond with the appointment block on which the user clicked.
Adding an appointment in a timeslot which has remaining capacity

To add an appointment in a timeslot:
1) Right-click a bubble in a timeslot.
2) In the menu that appears, click Add appointment. The Create Appointment form will appear. Follow the instructions in Creating appointments to create an appointment.

Notes:
- When the user arrives at the Create appointment page it will have the appointment date, time, and type preset to the values that correspond with the appointment block clicked.

Adding an appointment in a timeslot which has no remaining capacity

A user may not add an appointment to a timeslot which has insufficient capacity. An attempt to do so will cause an error message, and no appointment will be made. The following screenshot illustrates this scenario:
Section D - Appointment conflicts

Overview
An appointment conflict exists when the number of confirmed appointments in a timeslot exceeds the scheduled capacity. For example, this can happen when there are confirmed appointments in a given timeslot and an administrator blocks all appointments in that timeslot to accommodate a last minute staff meeting; the appointments in that timeslot are in conflict.

Finding appointment conflicts

Overview
To see the appointments which are in conflict:
1) Use the Agency search page to navigate to the agency in question. See Finding agencies (agency search) for more information.
2) In the left navigation, click Agency > Appointment conflicts. The Appointment conflict list page will appear. The following screenshot shows an example of an agency with conflicts:
The following columns appear on the *Appointment conflict list* page:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer is VIP</td>
<td>Whether the customer is a VIP (Very Important Person).</td>
</tr>
<tr>
<td>Agency name</td>
<td>The name of the agency at which the appointment is confirmed.</td>
</tr>
<tr>
<td>Appointment start date</td>
<td>The confirmed date of the appointment.</td>
</tr>
<tr>
<td>Appointment start time</td>
<td>The confirmed time of the appointment.</td>
</tr>
<tr>
<td>Customer first name</td>
<td>The first name of the customer who will attend the appointment. When the name is not available, “N/A” (not available) will be shown.</td>
</tr>
<tr>
<td>Customer PIN</td>
<td>A four digit PIN.</td>
</tr>
<tr>
<td>Appointment confirmation number</td>
<td>The appointment’s confirmation number.</td>
</tr>
<tr>
<td>Appointment type</td>
<td>The type of appointment.</td>
</tr>
<tr>
<td>Appointment status</td>
<td>The status of the appointment.</td>
</tr>
</tbody>
</table>
Resolving appointment conflicts

Overview

Resolving an appointment conflict is accomplished by rescheduling it to a date and time which has appointment capacity.

To resolve appointment conflicts:

1) If necessary, use the Agency search page to find the appropriate agency. See Finding agencies (agency search) for more information.

2) In the left navigation, click Agency > Appointment conflicts. The Appointment conflict list page will appear.

3) Click on the date link of an appointment to edit it. The Appointment edit page will appear.

4) Reschedule the appointment to resolve the conflict. See Rescheduling appointments for more information.
## Chapter 8 - Appointment administration

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<td>8–26</td>
</tr>
</tbody>
</table>
Appointment types

Overview

Appointment types serve to categorize appointments so that access to them can be governed independently. In other words, each type of appointment has its own set of permissions (e.g. to create) that govern access to that type of appointment. Otherwise, there is generally no functional difference between the types of appointments.

The following table describes the types of schedule exceptions that are available:

<table>
<thead>
<tr>
<th>Appointment type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular</td>
<td>The most common type of appointment. This is the only type of appointment to which the IVR telephone system has access.</td>
</tr>
<tr>
<td>Overflow</td>
<td>An appointment that some agencies use to allow NPIC help desk staff to schedule when all regular appointments are reserved. Such appointments are typically made when urgent conditions exist (e.g. family emergency). An example usage of this type of appointment is at the Boston agency, where they only schedule overflow appointments at 11:30am. An overflow appointment is also referred to as a “Backup appointment.”</td>
</tr>
<tr>
<td>Special case</td>
<td>An appointment used by NPIC Duty Officers and Agency Administrators to schedule new appointments when regular capacity is exhausted. Its use is intended to be a special case measure (ex: emergency) to make an appointment in any defined timeslot regardless of availability. A special case appointment is formerly known as an “Override Appointment.”</td>
</tr>
<tr>
<td>Walk-in</td>
<td>An appointment made by an agency receptionist when admitting a customer without an appointment. A walk-in appointment is simply a means to record the fact that the agency served a customer, improving report accuracy.</td>
</tr>
</tbody>
</table>
Entry points to the create appointment screen

Overview

A user must first enter the context of an agency before creating an appointment there (the “Agency” menu item is visible in the left navigation when a user is in that agency’s context). The following sections describe the entry points to the Create Appointment screen.

The Upcoming Appointments page (walk-in appointments only)

Only walk-in appointments may be created using this method. Perform the following steps to create a walk-in appointment from the appointment search page:

1) Use the Agency search page to find the agency with which to work. See Finding agencies (agency search) for more information.
2) In the left navigation, click Agency > Upcoming appts. The Upcoming Appointments page will appear.
3) Click the + New link. The Create Appointment form will appear.
4) Or: type [Ctrl+I]. The Create Appointment form will appear.
5) To create the appointment, follow the instructions in Creating appointments.

The Add walk-in appt link (walk-in appointments only)

Only walk-in appointments may be created using this method. Perform the following steps to create a walk-in appointment by clicking the Add walk-in appt link in the left navigation:

1) Use the Agency search page to find the agency with which to work. See Finding agencies (agency search) for more information.
2) In the left navigation, click Agency > Add walk-in appt. The Create Appointment form will appear.
3) To create the appointment, follow the instructions in Creating appointments.

The agency Appointment Search page

To create an appointment from the Agency Appointment Search page:

1) Use the Agency search page to find the agency with which to work. See Finding agencies (agency search) for more information.
2) In the left navigation, click Agency > Appt search. The Appointment Search page will appear.
3) Click the + New link. The user arrive at a blank appointment form.
4) To create the appointment, follow the instructions in Creating appointments.
To create an appointment from the *Effective Schedule* page:

1) Use the Agency search page to find the agency with which to work. See [Finding agencies (agency search)](#) for more information.

2) In the left navigation, click **Agency > Effective schedule**. The Effective Schedule page will appear.

3) Right-click the timeslot in which to create the appointment. Click the **Add appointment** in the menu that appears. The Appointment Create page will appear.

4) To create the appointment, follow the instructions in [Creating appointments](#).
Creating appointments

Overview

The Create Appointment page is the same for all types of appointments. To create an appointment:

1) Use one of the methods described in Entry points to the create appointment screen to find the Create Appointment page. A blank appointment form will appear:

Note: the following screenshot shows the page which is used for all appointment types, except for walk-in appointments. The Create Walk-in Appointment does not require “PIN” and “Phone” fields.
On the *General* tab, fill in the form fields.

<table>
<thead>
<tr>
<th>Field name</th>
<th>Data type</th>
<th>Min / length</th>
<th>Max / length</th>
<th>Required</th>
<th>Description/Validation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment date</td>
<td>Date</td>
<td>-</td>
<td>-</td>
<td>Yes</td>
<td>The date of the appointment. The date is local to the agency for which the appointment is made. See the <em>Notes</em> section below for more information about how the appointment date &amp; time values are set when arriving at the appointment create page.</td>
</tr>
<tr>
<td>Appointment time</td>
<td>Time</td>
<td>-</td>
<td>-</td>
<td>Yes</td>
<td>The start time of the appointment. The time is local to the agency for which the appointment is made. See the <em>Notes</em> section below for more information about how the appointment date &amp; time values are set when arriving at the appointment create page.</td>
</tr>
<tr>
<td>Appointment type</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Yes</td>
<td>The type of appointment. Select a value from the list.</td>
</tr>
<tr>
<td>Number of attendees</td>
<td>Integer</td>
<td>1</td>
<td>7</td>
<td>Yes</td>
<td>The number of people whose passports will be adjudicated during the appointment. For example, if a family of 3 each need a passport service performed at the appointment then set the value to 3. The value must be between 1 and 7.</td>
</tr>
<tr>
<td>Is VIP</td>
<td>True/False</td>
<td>-</td>
<td>-</td>
<td>Yes</td>
<td>Whether the customer is a VIP (Very Important Person).</td>
</tr>
<tr>
<td>Customer first name</td>
<td>Text</td>
<td>2</td>
<td>50</td>
<td>No</td>
<td>The customer’s first name.</td>
</tr>
<tr>
<td>Customer’s PIN</td>
<td>Integer</td>
<td>4</td>
<td>4</td>
<td>Yes</td>
<td>The customer’s PIN. (Not require for walk-in appointment)</td>
</tr>
</tbody>
</table>
Notes:

- When the user arrives at the *Create appointment* page via the *Effective Schedule* page by **Adding an appointment in a timeslot which has remaining capacity** then the date and time will be defaulted to the date and time selected on the *Effective Schedule* page.

- When the user arrives at the *Create appointment* page via the *Appointment Search* page then the date and time will be defaulted to values used in the date and time filters on the *Appointment Search* page.

- In any other event, the date and time will default to the next available timeslot according to the agency’s actual current time.

The walk-in appointment type will only be available when the user arrives at the *Create Appointment* page via the *Upcoming Appointments* page.
Tips for creating appointments quickly

Overview

When the reception area of an agency is busy, it is important to be able to add walk-in appointments quickly. Most users rely heavily on the computer mouse to click buttons, to click links, and to move between fields on the screen. However, with a little practice, the same tasks can be accomplished much more quickly using only the computer keyboard. Using only the keyboard is quicker because the user does not need to take their eyes off the screen and does not have to take their hand off the keyboard to handle the computer mouse.

The rest of this section describes how a user can create a walk-in appointment using only the keyboard.

Before following the instructions below, using the computer mouse, click Upcoming appts. This opens the Upcoming Appointments page. This will only need to be done once!
**Example #1: Entering only the number of attendees**
Using the keyboard only, create a walk-in appointment for Tonya. Tonya needs a passport for herself and for her daughter (2 attendees).

2) Press **[2]** (# of attendees).
3) Press **[Enter]**. Saves the new appointment and causes the Confirmation page to appear.
4) Press **[Enter]**. The Upcoming Appointments page will appear.

**Example #2: Entering data in all of the appointment fields**
Using the keyboard only, create a walk-in appointment for Steve the VIP. His PIN is “5543”, he has 3 attendees and his phone number is “5556763422”.

2) Press **[3]** (# of attendees).
3) Press **[Tab]**.
4) Press **[Spacebar]**.
5) Press **[Tab]**.
6) Type “Steve” (first name).
7) Press **[Tab]**.
8) Type “5543” (PIN).
9) Press **[Tab]**.
10) Type “5556763422” (phone number).
11) Press **[Tab]**.
12) Press **[Enter]**. Saves the new appointment and causes the Confirmation page to appear.
13) Press **[Enter]**. The Upcoming Appointments page will appear.

Repeat steps 1 through 13 to create another appointment. The user never has to touch the mouse!

This keyboard “trick” is not limited to creating walk-in appointments. It’s available everywhere on the website. Experiment with it and you will find that using the keyboard can often be faster than using the mouse.

See [Keyboard Navigation](#) for more information.
Entry points to the edit appointment screen

Overview

An agency must be in context in order to edit an appointment (i.e. the “Agency” menu item must be visible in the left navigation). The following sections describe the entry points to the edit appointment screen.

The agency Appointment Search page (including walk-in appointments)

To edit an appointment from the Agency Appointment Search page:

1) Use the Agency search page to find the agency with which to work. See Finding agencies (agency search) for more information.
2) In the left navigation, click Agency > Appt search. The user will arrive at the Appointment Search page.
3) Enter search terms into the search form to find the appointment to edit. See Finding an agency’s appointments (past, present, or future) for more information.
4) Click on the date link of the appointment to edit it. The user will arrive at the Appointment Edit page.
5) To edit the appointment, follow the instructions in Editing appointments.

The Search all Appointments page

To edit an appointment from the Search All Appointments page:

1) In the left navigation, click Agency > Search all appts. The user will arrive at the appointment search page.
2) Enter search terms into the search form to find the appointment to edit. See Finding appointments – multiple agencies for more information.
3) Click on the date link of the appointment to edit it. The user will arrive at the Appointment Edit page.
4) To edit the appointment, follow the instructions in Editing appointments.
The Effective Schedule page

To edit an appointment from the Effective Schedule page:

1) Use the Agency search page to find the agency with which to work. See Finding agencies (agency search) for more information.

2) In the left navigation, click Agency > Effective schedule. The user will arrive at the Effective Schedule page.

3) Right-click the timeslot that contains the appointment to edit. Left-click View existing appointments in the menu that appears. The user will arrive at the Appointment Search page. Alternatively, double-click the timeslot that contains the appointment to edit. The user will arrive at the Appointment Search page.

4) Click on the date link of the appointment to edit it. The user will arrive at the Appointment Edit page.

5) To edit the appointment, follow the instructions in Editing appointments.
Editing appointments

Overview

Follow these steps to edit an appointment:

1) Follow the instructions in Entry points to the edit appointment screen to get to the Appointment Edit screen.

2) Edit the appointment by altering the existing values in the form fields. For more information about the nature of the form fields, see Creating appointments.

3) Click the Save button to submit the changes. To abandon changes, click the Cancel button.
Cancelling appointments

Overview
Follow these steps to edit an appointment:
1) Follow the instructions in Entry points to the edit appointment screen to get to the Appointment Edit screen.
2) Click the Cancel appointment tab to activate it.
3) Click the Cancel appointment button to cancel the appointment. A confirmation window will appear.
4) In the confirmation window, click OK to cancel the appointment. Click Cancel to abandon the change.

Notes:
❖ You may not cancel appointments that are in the past.
Rescheduling appointments

Overview
To reschedule an appointment, first create a new appointment and then cancel the old appointment. The user should create the new appointment before cancelling the old appointment to eliminate the risk of a customer being left without an appointment.

To reschedule an appointment:
1) Create a new appointment at the desired agency, date and time. Follow the instructions in Creating appointments to create the appointment.
2) Cancel the old appointment. Follow the instructions in Cancelling appointments to cancel the appointment.
Adding appointment notes

Overview

Appointment notes may only be added to existing appointments. To add an appointment note:

1) Find the appointment to which to add the note. See Finding an agency’s appointments (past, present, or future) for more information.

2) On the Appointment Edit page, click the Notes tab.

3) Click the + New link. The Create appointment note page will appear.

4) Type the note into the box provided.

5) To save the note, click the Save button. To abandon it, click the Cancel button.

6) On the confirmation page, click the Close button to return to the Appointment Edit page.

Notes:

❖ The Notes tab on the Appointment Edit page indicates the number of notes that are present. For example, “Notes [0]” indicates that there are zero appointment notes; “Notes [2]” indicates that there are two appointment notes.

The Notes tab’s text will be bolded and colored red when the appointment has one or more notes.
Editing appointment notes

Overview

To edit an appointment note:

1) Find the appointment to which to add the note. See Finding an agency’s appointments (past, present, or future) for more information.

2) On the Appointment Edit page, click the Notes tab.

3) Click the Edit link of the note to edit. The Edit appointment note page will appear.
4) Alter the note by changing the text in the box provided.

5) To save the change, click the **Save** button. To abandon it, click the **Cancel** button.

On the confirmation page, click the **Close** button to return to the *Appointment Edit* page.
Finding an agency’s upcoming appointments (Receptionist search)

Overview

This page allows the user to search only future appointments. This page is generally used by those people that greet customers who check-in to their appointment at the agency (i.e. an employee in the reception area; a receptionist). The page is also called the Receptionist search.

To find an agency’s upcoming appointments:

1) If necessary, use the Agency search page to find the agency with which to work. See Finding agencies (agency search) for more information.
2) In the left navigation, click Agency > Upcoming appointments. The Appointment search page will appear.
3) Search for an appointment by entering one or more search filters and clicking the Search button. For more information regarding the use of search forms, see Search forms.
4) Click on the date of an appointment to view or to edit it.

Notes:

- The types of appointments which are returned in the results depend on the role(s) to which the user belongs and which types of appointments the role is allowed to search.
- Clicking the date link will redirect the user to a view-only appointment page or to an edit-mode appointment page depending on the role(s) to which the user belongs and whether the role is allowed to edit that type of appointment.
## Upcoming appointments

To filter the appointments, enter search terms in the box(es) below and click the Search button on the right. The date & time boxes filter appointments that are “on or after” (OOA) the specified values. To check a customer in, click the Check-in button. Only the first 500 matching results are shown.

* Indicates that the customer is a VIP. – Indicates that the appointment has notes.

<table>
<thead>
<tr>
<th>No</th>
<th>VIP</th>
<th>Date</th>
<th>Time</th>
<th>Conf #</th>
<th>Phone</th>
<th>Last four</th>
<th>First name</th>
<th>Status</th>
<th>Checked-in status</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>Mon</td>
<td>12/30/13</td>
<td>1:30 PM</td>
<td>49245508</td>
<td>(714) 421-0067</td>
<td>8975</td>
<td>N/A</td>
<td>Confirmed</td>
<td>Not checked-in</td>
</tr>
<tr>
<td>No</td>
<td>Mon</td>
<td>12/30/13</td>
<td>1:30 PM</td>
<td>49245655</td>
<td>(818) 721-1255</td>
<td>9840</td>
<td>N/A</td>
<td>Confirmed</td>
<td>Checked-in</td>
</tr>
<tr>
<td>No</td>
<td>Mon</td>
<td>12/30/13</td>
<td>1:30 PM</td>
<td>49245750</td>
<td>(714) 472-0272</td>
<td>9066</td>
<td>N/A</td>
<td>Confirmed</td>
<td>Checked-in</td>
</tr>
<tr>
<td>No</td>
<td>Mon</td>
<td>12/30/13</td>
<td>1:30 PM</td>
<td>49245078</td>
<td>(305) 637-7223</td>
<td>5330</td>
<td>N/A</td>
<td>Confirmed</td>
<td>Not checked-in</td>
</tr>
<tr>
<td>No</td>
<td>Mon</td>
<td>12/30/13</td>
<td>2:30 PM</td>
<td>492450103</td>
<td>(330) 0234</td>
<td>0688</td>
<td>N/A</td>
<td>Confirmed</td>
<td>Not checked-in</td>
</tr>
<tr>
<td>No</td>
<td>Mon</td>
<td>12/30/13</td>
<td>2:30 PM</td>
<td>49247388</td>
<td>(661) 645-2917</td>
<td>6548</td>
<td>N/A</td>
<td>Confirmed</td>
<td>Not checked-in</td>
</tr>
<tr>
<td>No</td>
<td>Mon</td>
<td>12/30/13</td>
<td>2:30 PM</td>
<td>49247321</td>
<td>(562) 866-5520</td>
<td>2406</td>
<td>N/A</td>
<td>Confirmed</td>
<td>Not checked-in</td>
</tr>
<tr>
<td>No</td>
<td>Mon</td>
<td>12/30/13</td>
<td>2:30 PM</td>
<td>49247359</td>
<td>(818) 378-4252</td>
<td>3084</td>
<td>N/A</td>
<td>Confirmed</td>
<td>Not checked-in</td>
</tr>
</tbody>
</table>
Appointment check-in

Overview

Each appointment on the *Upcoming appointments* page includes a Checked-in status field indicating whether a customer has checked into their appointment. Checking a customer into their appointment is a convenient way to keep track of the number of appointment “no shows.”

<table>
<thead>
<tr>
<th>Checked-in status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checked-in</td>
<td>When a customer is checked-in to their appointment, the Checked-in status field is displayed as a green button containing the text “Checked-in.”</td>
</tr>
<tr>
<td>Not checked-in</td>
<td>When a customer is not checked-in to their appointment, the Checked-in status field is displayed as a gray button which contains the text “Not checked-in.”</td>
</tr>
</tbody>
</table>

Checking a customer into their appointment (check-in)

To check a customer into an appointment, click on the appointment’s **Not checked-in** button. Clicking the button will change its status to “Checked-in.”

Undo a checked-in appointment (check-out)

To undo a checked-in appointment click on the appointment’s **Checked-in** button. Clicking the button will change its status to “Not checked-in.”
Finding an agency’s appointments (past, present, or future)

Overview

To find any appointment belonging to an agency which is in the past, present, or future:

1) If necessary, use the Agency search page to find the agency with which to work. See Finding agencies (agency search) for more information.

2) In the left navigation, click Agency > Appointment search. The Appointment search page will appear.

3) Search for an appointment by entering one or more search filters and clicking the Search button. For more information regarding the use of search forms, see Search forms.

4) Click on the date of an appointment to view or to edit it in the Appointment page.

Notes:

- The types of appointments which are returned in the results depend on the role(s) in which the user has membership and which types of appointments the role is allowed to search.
- Clicking the date link of a particular appointment, either a read-only Appointment page or an edit-mode Appointment page will appear depending on the permissions granted to the role(s) in which the user has membership.

The following screenshot shows the Agency appointment search page:
**Search filters**

The following search filters are available on the agency appointment search page:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Data type</th>
<th>Max length</th>
<th>Match type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer is VIP</td>
<td>True/False</td>
<td>-</td>
<td>Exact</td>
<td>Indicates if customer is a VIP (Very Important Person).</td>
</tr>
<tr>
<td>Appointment start date</td>
<td>Date</td>
<td>-</td>
<td>Exact</td>
<td>The date of the appointment.</td>
</tr>
<tr>
<td>Appointment start time</td>
<td>Time</td>
<td>-</td>
<td>Grea...</td>
<td>The appointment’s start time.</td>
</tr>
<tr>
<td>Customer first name</td>
<td>Text</td>
<td>25</td>
<td>Starts...</td>
<td>The first name of the customer who will attend the appointment. When the name is not available, “N/A” (not available) is shown.</td>
</tr>
<tr>
<td>Customer PIN</td>
<td>Text</td>
<td>4</td>
<td>Exact</td>
<td>A four digit PIN.</td>
</tr>
<tr>
<td>Appointment confirmation number</td>
<td>Text</td>
<td>9</td>
<td>Exact</td>
<td>The appointment’s confirmation number.</td>
</tr>
<tr>
<td>Appointment type</td>
<td>-</td>
<td>-</td>
<td>Exact</td>
<td>The type of appointment. The types shown will be limited to those that a user is allowed to search for the current agency.</td>
</tr>
<tr>
<td>Appointment status</td>
<td>-</td>
<td>-</td>
<td>Exact</td>
<td>The status of the appointment.</td>
</tr>
</tbody>
</table>
Finding appointments – multiple agencies

Overview

If a user has membership in multiple agency roles which permit them to search for appointments in those agencies then a link entitled “Search all appts” will appear in the left navigation.

To find appointments in the agencies to which the user has access:

1) In the left navigation, click **Search all appts**. The Appointment search page will appear.

2) Search for an appointment by entering one or more search filters and clicking the **Search** button. For more information regarding the use of search forms, see **Search forms**.

3) Click on the date of an appointment to view or to edit it.

Notes:

- Search results will contain only appointments in agencies in which the user has appropriate role membership.
- The types of appointments which are returned in the results depend on the user’s role membership(s) and which types of appointments the role is allowed to search.
- Clicking the date link of a particular appointment, either a read-only Appointment page or to an edit-mode Appointment page will appear depending on the permissions granted to the role(s) in which the user has membership.
Search filters  The following search filters are available on the *Agency appointment search* page:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Data type</th>
<th>Max length</th>
<th>Match type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency short name</td>
<td>Text</td>
<td>3</td>
<td>Exact</td>
<td>A 2-3 character code representing the agency.</td>
</tr>
<tr>
<td>Appointment start date</td>
<td>Date</td>
<td>-</td>
<td>Exact</td>
<td>The date of the appointment.</td>
</tr>
<tr>
<td>Appointment start time</td>
<td>Time</td>
<td>-</td>
<td>Greater than or equal</td>
<td>The appointment’s start time.</td>
</tr>
<tr>
<td>Customer first name</td>
<td>Text</td>
<td>25</td>
<td>Starts-with</td>
<td>The first name of the customer who will attend the appointment. When the name is not available, “N/A” (not available) will be shown.</td>
</tr>
<tr>
<td>Customer PIN</td>
<td>Text</td>
<td>4</td>
<td>Exact</td>
<td>A four digit PIN.</td>
</tr>
<tr>
<td>Appointment confirmation number</td>
<td>Text</td>
<td>9</td>
<td>Exact</td>
<td>The appointment’s confirmation number.</td>
</tr>
<tr>
<td>Appointment type</td>
<td>--</td>
<td>Exact</td>
<td></td>
<td>The type of appointment. The types shown will be limited to those that the user’s role membership(s) is allowed to search, for all agencies in which the user has such a role(s). For example, if the user is a member of a role in Agency A which is allowed to search “Regular” appointments and the user is a member of a role in Agency B which is allowed to search “Special case” appointments then the list will include both “Regular” and “Special case”.</td>
</tr>
<tr>
<td>Appointment status</td>
<td>-</td>
<td>Exact</td>
<td></td>
<td>The status of the appointment.</td>
</tr>
</tbody>
</table>
Rolling schedules, schedule exceptions, effective schedules, and appointment conflicts

Overview

Viewing and editing rolling schedules, schedule exceptions, effective schedules, and appointment conflicts, are agency schedule-centric activities. Please see *Agency administration*. 
Chapter 9 - Region administration

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<td>9–4</td>
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<tr>
<td>Assigning agencies to regions</td>
<td>9–5</td>
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<tr>
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<td>9–6</td>
</tr>
</tbody>
</table>

Background information

Overview

Regions serve as a means to group several agencies together under a given name. Users that are a member of a role that is permitted to run a report will be able to run it for any or all agencies in a region if the user is also a member of that region. Roles can also be created at a regional level, which grants member users the underlying permissions for all agencies that are in the region for which the role was granted.
Creating regions

Overview

To create a region:

1) In the left navigation, click System settings > Regions. The user will arrive at the Region List page.

2) Click the + New link. A blank Create Region form will be displayed:

![Create Region form](Regions.png)

3) On the General tab, fill in the form fields.

<table>
<thead>
<tr>
<th>Field name</th>
<th>Data type</th>
<th>Min / length</th>
<th>Max / length</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Region name</td>
<td>Text</td>
<td>2</td>
<td>50</td>
<td>Yes</td>
<td>The name of the region.</td>
</tr>
</tbody>
</table>

4) To add the new region, click the Save button. To abandon it, click the Cancel button.
Editing regions

Overview

To edit a region:

1) Follow the instructions in Finding regions to find the region.
2) Click the Edit link to edit the region. The Region Edit page will appear.
3) Edit the region by altering the values in the form fields. For more information about the nature of the form fields, see Creating regions.
4) To save the changes, click the Save button. To abandon them, click the Cancel button.

Regions > Northeast Region

Regions serve as a means to group several agencies together under a given name. Users that are a member of a role that is permitted to run a report will be able to run it for any or all agencies in a region if the user is also a member of that region. Roles can also be created at a regional level, which grants member users the underlying permissions for all agencies that are in the region for which the role was granted.

Use the Agency Edit page to assign an agency to a region.

* Field labels prefixed with an asterisk indicate that the field is required.

General

Please provide the name for the region and click "Save".

*Name: Northeast Region

[Save] [Cancel]
Deleting regions

Overview

To delete a region:
1) Follow the instructions in Editing regions to edit the region.
2) Click the Delete table to activate it.
3) Click the Delete button to delete the region. A confirmation window will appear.
4) In the confirmation window, click OK to delete the region. Click Cancel to abandon the change.
Assigning agencies to regions

Overview

Agencies are assigned to regions using the Agency Edit page. See Editing agencies for more information.
Finding regions

Overview

To find a region:
1) In the left navigation, click System settings > Regions. The user will arrive at the Region List page.
2) Click the Edit link to edit the region.

Notes:
- The region list page does not offer the ability to filter results.
# Chapter 10 - Reporting & report administration

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<tr>
<td>The Report result area</td>
<td>10–15</td>
</tr>
</tbody>
</table>
Requesting new reports to be created (or existing reports to be changed)

Overview

Reports are defined, designed, and created by a computer programmer; reports cannot be created directly in CAS.

To suggest a new report or to request a change to an existing report, please contact a System Administrator.
Adding reports

Overview

In this document, “adding a new report” refers to using the Adding Reports page to upload a Report Definition file which has been created by a computer programmer. Reports may be added only by those users that belong to a role which has the Can manage reports permission.

To add a report:

1) In the left navigation, click Reporting > Reports. The user will arrive at the Report Search page.

2) Click the + New link. A blank Add report form will be displayed:

![Add report form](image)

Add a new report by uploading a Report Definition (.rdl) on this page. Note: this page does not give you the means to create a Report Definition. Report Definition files are created by computer programmers. To suggest a new report to be created, please contact a System Administrator.

* Field labels prefixed with an asterisk indicate that the field is required.

**General**

- **Name**: Max 50 characters
- **Description**: Max 1000 characters
- **File**: Choose File

Click Choose File to select a Report Definition (.rdl) file.
3) On the *General* tab, fill in the form fields.

<table>
<thead>
<tr>
<th>Field name</th>
<th>Data type</th>
<th>Min / length</th>
<th>Max / length</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report name</td>
<td>Text</td>
<td>2</td>
<td>50</td>
<td>Yes</td>
<td>The name of the report.</td>
</tr>
<tr>
<td>Description</td>
<td>Text</td>
<td>1</td>
<td>1000</td>
<td>Yes</td>
<td>A description of the report.</td>
</tr>
<tr>
<td>Report file name</td>
<td>Report Definition file</td>
<td>-</td>
<td>-</td>
<td>Yes</td>
<td>The Report Definition file which was created by a programmer. The file must have a file extension of “.rds”. Report Definition files are created in the Microsoft SQL Server Reporting Services format.</td>
</tr>
</tbody>
</table>

To add the new report, click the **Save** button. To abandon it, click the **Cancel** button.
**Editing reports**

**Overview**

In this document, “editing a report” refers to editing the settings of a report that was added using the Adding Reports page. A report’s Report Definition may not be edited in CAS. Reports may be edited only by those users that belong to a role which has the Can manage reports permission.

To edit a report:
1) Follow the instructions in Finding reports (report search) to find the report.
2) Click the report’s name to edit it. The Report Edit page will be displayed.
3) Edit the report by altering the values in the form fields. For more information about the nature of the form fields, see Adding Reports.
4) To save the changes, click the Save button. To abandon them, click the Cancel button.

---

**Reporting > Reports > Agency Appointment Summary**

**General**

- **Name**: Agency Appointment Summary
- **Description**: Agency Appointment Summary, also used as a sub-report for the All Agencies by FY And Month report.

**File**

Choose File: No file chosen

Click Choose File to select a Report Definition (.rdl) file to change its definition. Leave the File field blank if you are just editing the name, description or roles.

---


Deleting reports

Overview

In this document, “deleting a report” refers to deleting a report that was added using the Adding Reports page. Reports may be deleted only by those users that belong to a role which has the Can manage reports permission.

To delete a report:

1) Follow the instructions in Editing reports to edit the report.
2) Click the Delete table to activate it.
3) Click the Delete button to delete the report. A confirmation window will appear.
4) In the confirmation window, click OK to delete the report. Click Cancel to abandon the change.
Configuring the roles permitted to view a report

Overview

To configure which roles are permitted to view (i.e. to run) a report:
1) Follow the instructions in Editing reports to edit the report.
2) Click the Report Roles tab to activate it.
3) For each role that should be permitted to view the report, click the checkbox to the left of the role’s name. A role is selected when a check mark appears in its corresponding checkbox.
4) To save the changes, click the Save button. To abandon them, click the Cancel button.

Notes:
- Users that belong to a role with the Can manage reports permission will always be permitted to view all reports, regardless of whether the role has been granted permission to view a report.
Finding reports (report search)

Overview

To find a report:

1) In the left navigation, click **Reporting > Reports**. The user will arrive at the **Report Search** page.

2) Search for a report by entering one or more search filters and clicking the **Search** button. For more information regarding the use of search forms, see **Search forms**.

3) Click a report’s name to edit it.

<table>
<thead>
<tr>
<th>Search filters</th>
<th>The report search page offers the following search filters:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Field name</th>
<th>Data type</th>
<th>Max length</th>
<th>Match type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report name</td>
<td>Text</td>
<td>25</td>
<td>Starts with</td>
<td>Clicking the report’s name shall display it.</td>
</tr>
<tr>
<td>Description</td>
<td>Text</td>
<td>-</td>
<td>-</td>
<td>Display only.</td>
</tr>
</tbody>
</table>
Running reports

Overview

To view (i.e. to run) a report:

1) In the left navigation, click Reporting > Reports. The Report Search page will appear.

2) Search for a report by entering one or more search filters and clicking the Search button. For more information regarding the use of search forms, see Search forms.

3) Click the View Report link to view it. The report will be shown in a new window.
Report page

Overview

The report page provides the means to configure report filters and to view report results.

The following screenshot shows a typical report page. The functional areas are circled; they are explained in more detail later in this section.
Filtering report results using search filters

Overview

When applied to a report, search filters constrain the report results to contain only those results that match the search filter. Follow these steps to apply a search filter:

1) Enter a search term into one or more search filter in the Report filters section;
2) Click the View Report button to apply the search filters (i.e. run the report).

Notes:
- Search filters are cumulative. The search results will contain only those results that match the search terms of all the search filters specified.
- Search filters are case insensitive.
- Altering the value of a search filter may cause the report result to disappear (because the report result no longer matches the search filters). To apply the new search filters (i.e. run the report), click the View Report button.
## Search filter field types

**Overview**

Search filter types control the way in which a search filter matches results. The following table describes the available search filter field types and how to use them.

<table>
<thead>
<tr>
<th>Filter field type</th>
<th>Example</th>
<th>Description</th>
</tr>
</thead>
</table>
| Date selector         | ![Date Selector Example](example_date_selector.png) | • Activate the calendar by clicking on the icon to the right of the box.  
  • Change the month by clicking on the paging arrows. The arrows function in the same manner as those described in the [Search results paging functions](#) section of this document.  
  • Select a date by clicking on the number of the day of the month.  
  • The match type is always “on or after”. |
| Single-select drop down | ![Single-Select Drop Down Example](example_single_select_drop_down.png) | • To activate the drop down, click on it. The example drop down is activated.  
  • Specify a search term by clicking on the desired search term to select it.  
  • The match type is always “exactly”. |
Search filter match types

Overview

Report search filters use the same search filter match types as described in Search filter match types.
# Paging functions

**Overview**

When a report’s results has multiple pages, the report results paging buttons and fields give the user the ability to see the next and previous pages. The paging features are always displayed beneath the search results.

The following table describes each button’s purpose:

<table>
<thead>
<tr>
<th>Button</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Next]</td>
<td>Clicking this button advances to the next page.</td>
</tr>
<tr>
<td>[Previous]</td>
<td>Clicking this button returns to the previous page.</td>
</tr>
<tr>
<td>[Last]</td>
<td>Clicking this button advances to the last page.</td>
</tr>
<tr>
<td>[First]</td>
<td>Clicking this button returns to the first page.</td>
</tr>
<tr>
<td>[Parent]</td>
<td>Clicking this button returns the user to the parent report. Clickable only in the event that the user is viewing a drilldown report (i.e. a report that has a parent).</td>
</tr>
<tr>
<td>[Find]</td>
<td>Enter a search filter into the box and click the <strong>Find</strong> button to find that text in the report result. Enter <strong>Next</strong> to find the next instance of the text.</td>
</tr>
<tr>
<td>[Refresh]</td>
<td>Enter a number into the box and click the <strong>Refresh</strong> button advances to that page.</td>
</tr>
<tr>
<td>![Dropdown Icon]</td>
<td>Click the icon to activate the single-select dropdown. Click an item in the list to save the report result in that format. For example, to save the report result in Microsoft Excel format, click the <strong>Excel</strong> link.</td>
</tr>
<tr>
<td>![Refresh Icon]</td>
<td>Clicking this button returns refresh the report result (ex: to get the latest result data).</td>
</tr>
</tbody>
</table>
## The Report result area

| Overview | The report result area shows the final output of the report with all report filters applied. |
Chapter 11 - Accessibility features

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<td>Font size adjustments</td>
<td>11–3</td>
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<tr>
<td>Screen reader compatibility</td>
<td>11–4</td>
</tr>
<tr>
<td>Keyboard navigation</td>
<td>11–5</td>
</tr>
</tbody>
</table>

Overview

The CAS website is compliant with the American Disabilities Act (ADA) Section 508 Guidelines. The remainder of this section describes CAS’s accessibility features.
Operating system accessibility features are unaltered

Overview
CAS does not prevent or disable the use of normal Operating System accessibility functions such as text size adjustment, color adjustment, built-in screen readers, and so forth.
Font size adjustments

Overview

The text size of all pages may be adjusted using the *Text size* adjustment in your browser.

For example, the following screenshot shows the *Text size* feature in Internet Explorer version 10.
Screen reader compatibility

Overview

CAS has been tested with and is known to work with screen readers such as JAWS, Thunder, and Microsoft Windows Narrator.
# Keyboard navigation

## Overview

CAS is navigable using a keyboard only.

<table>
<thead>
<tr>
<th>Keyboard key</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Enter]</td>
<td>Activate the form element. Equivalent of clicking the form field. For example, pressing [Enter] when the Save button is selected has the same effect as clicking the button with the mouse.</td>
</tr>
<tr>
<td>[Tab]</td>
<td>Moves the cursor to the next form field.</td>
</tr>
<tr>
<td>[Shift-Tab]</td>
<td>While pressing the [Shift] button, press the [Tab] key. Moves the cursor to the previous form field.</td>
</tr>
<tr>
<td>[Escape]</td>
<td>Cancels a form submission and closes browser alerts.</td>
</tr>
</tbody>
</table>
Appendix A – Assistance Information

CA Service Desk Information

The CA Service Desk is the primary point of contact for all users. A technical team with the necessary personnel supports this desk. Please refrain from calling or emailing individuals about a new problem. We track all calls and emails sent to the CA Service Desk and strive to ensure that they are efficiently routed to the appropriate person.

Hours Of Operation

The CA Service Desk is available 24-hours a day, 7 days a week.

* Please contact the CA Service Desk via telephone for urgent support requests.

Telephone

(202) 485-7777

E-Mail

CAServiceDesk@state.gov

Glossary and Acronyms

A complete listing of terms used in this User Manual can be found on the CM Website.

When to Contact the CA Service Desk

To recommend a change to CAS, submit a CCR to the CA Service Desk.
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