

Vocera Platform My Workflow Guide

Version 6.2.0

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About the Vocera Platform My Workflow Guide

The Vocera Platform My Workflow Guide describes how to perform tasks using the My Workflow feature.

You can use this document as you work with My Workflow in the Vocera Platform Web Console. The organization of this guide generally matches the layout of the My Workflow console.

Selecting My Workflow displays the Menu screen, which allows users to access Vocera workflows via a web browser to perform specific tasks. For example, a Department Secretary can track alerts using My Workflow.



Note: Any hospital may include additional options to those described in this My Workflow documentation. Depending on the solution installed in your facility, you may see additional options that may not be described in this document.

Getting Started With My Workflow

To start using My Workflow, you must first log into the Vocera Platform Web Console.

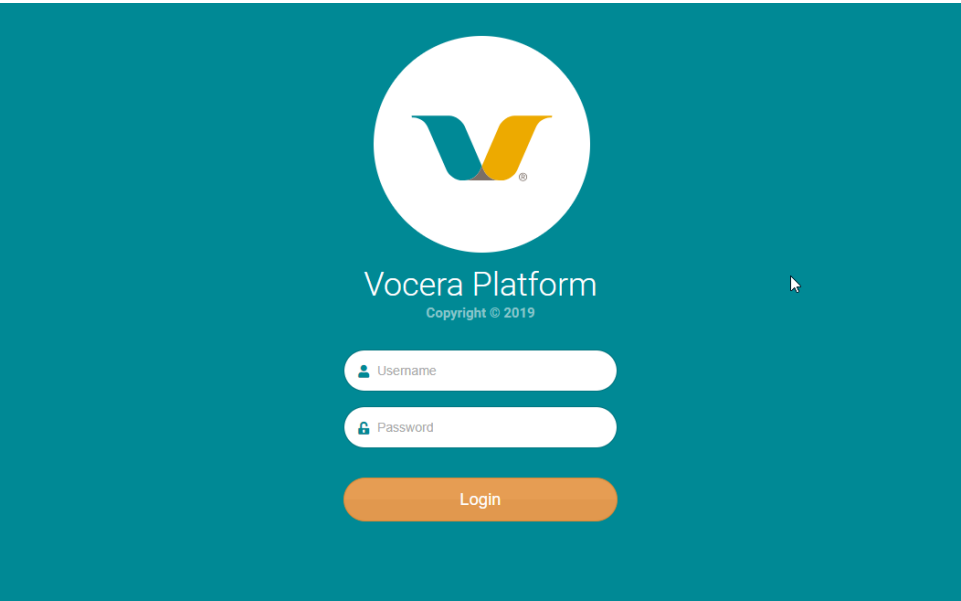
Logging Into My Workflow

You can typically log into the Vocera Platform Web Console using the credentials you provide for other applications in your organization (your Active Directory credentials).

Use the following steps to log into the Vocera Platform Web Console using Active Directory authentication:

1. In your browser, type the URL of the Vocera Platform Web Console that your administrator has provided for you.

The Vocera Platform login screen appears.

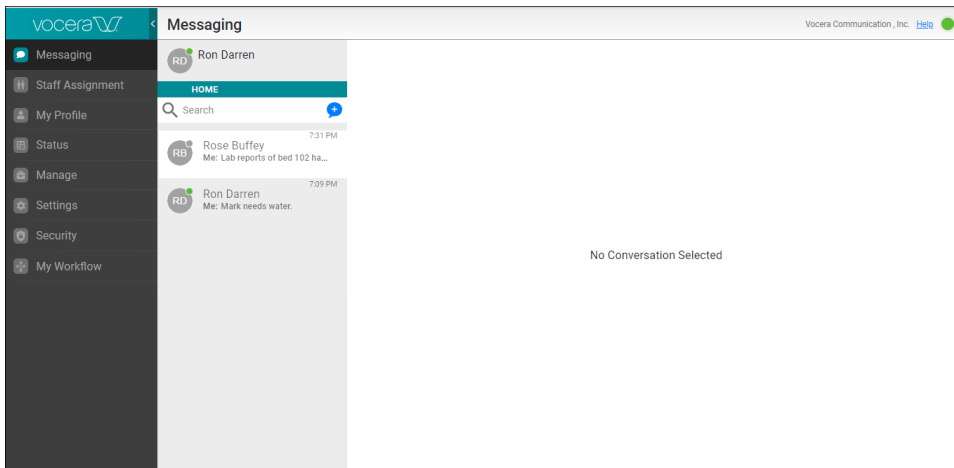


2. Specify the following values:

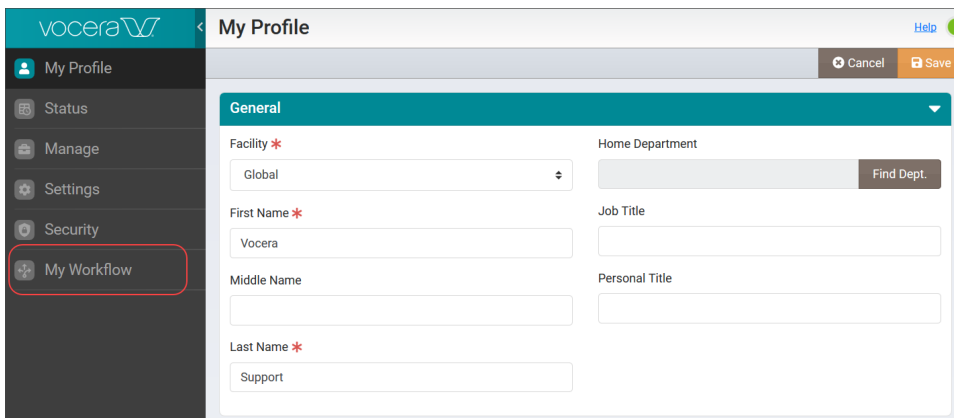
Field	Description
Username	Enter your username (up to 250 characters).
Password	Enter your password (up to 127 characters).

3. Click **Log In**.

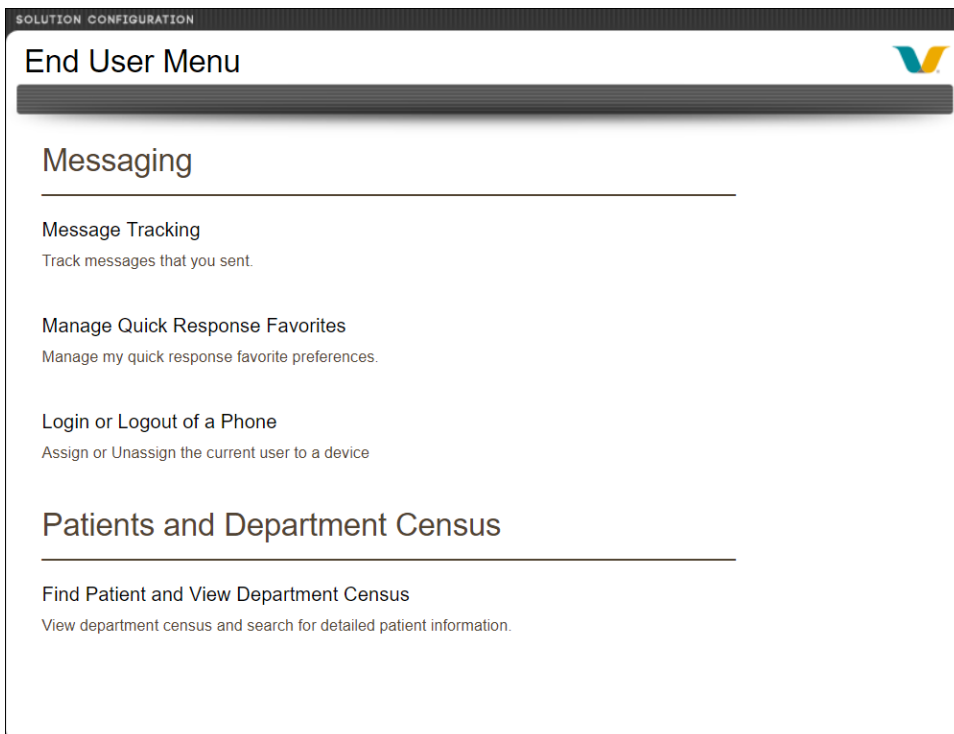
The Vocera Platform Web Console screen appears.



4. If the My Workflow page is not visible, select **My Workflow** from the panel at the left.



The **My Workflows** page displays. See [The My Workflow Home Screen Layout](#) on page 8 for more information.



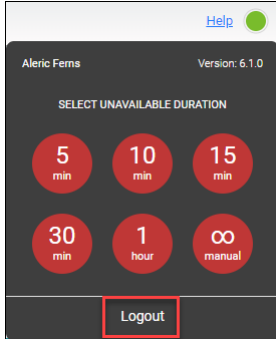
Logging Out

When you are finished using the Vocera Platform Web Console, log out.

To log out from the Vocera Platform Web Console:

1. Click the presence icon in the top right corner of the Vocera Platform Web Console.

The presence dialog box appears.



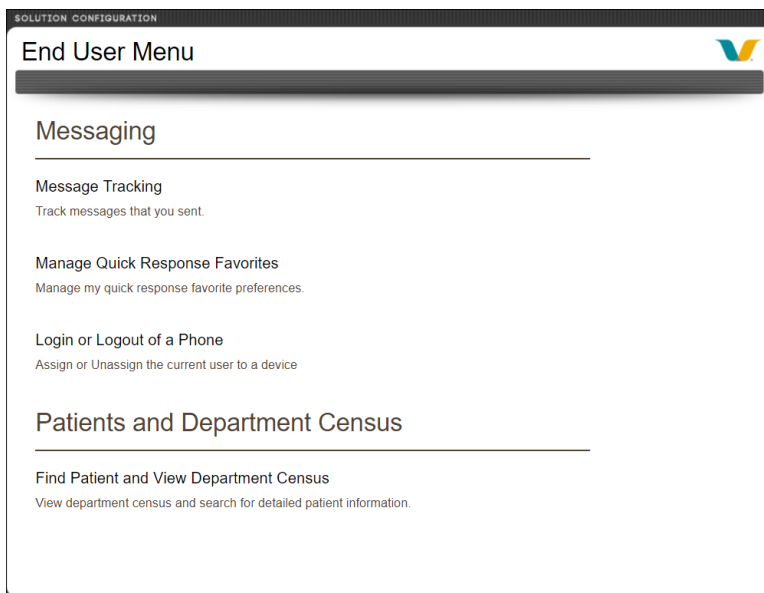
2. Click **Logout** at the bottom of this dialog box.

The system logs you out.

The My Workflow Home Screen Layout

My Workflows displays a menu of the workflows available based on your roles and privileges.

Select **My Workflow** in the Vocera Platform Web Console to access the workflows, as shown in the following example.



By default, Vocera's My Workflows functionality provides access to a set of workflows for four pre-defined user roles; End User, Charge Nurse/Department Secretary, Super User, and Administrator. These default roles allow users to efficiently perform their responsibilities from the workflow menu displayed in a web browser.

Each menu is divided into two or more sections which may include the following:

- Messaging
- Configuration
- Monitor Tech
- Patients and Department Census

The user roles and the default workflow privileges allowed for each of the four roles described in this My Workflow documentation are provided as common example configurations. Hospitals may modify the name of the "Roles" or create additional roles to reflect the structure of the facility. For example, the End User role can view their assigned unit census, while the Administrator role can create a new unit in the facility.



Note: Workflows may not be enabled in your facility's implementation; contact a System Administrator for assistance.

Matrix of Workflows and User Roles

You can access workflows based on the roles associated with your profile in order to perform tasks in Vocera Platform Web Console.

Not all of the following workflows are available in the solution, and therefore may not be available in your facility. For example, the Staff Assignment workflows are only available when the supplemental package is installed, and must be added manually to the Administrator Menu by a Vocera Implementation Engineer.

Workflows	End User	Charge Nurse/Department Secretary	Super User	Administrator User
Messaging				
Message and Alert Tracking and Reporting: Track and run reports on the delivery of messages and alerts to phones. Find and view message and alert deliveries to a mobile device, as well as the delivery history.		Yes	Yes	Yes
Assignment History: View the assignment history.				Yes
Message Tracking: Track the messages that you sent. You can access the delivery history details for personal and group messages sent from your device.	Yes			
Manage Quick Response Favorites: Manage my quick response favorite preferences.	Yes			
Login or Logout of a Phone: Assign or Unassign the current user to a device. You can log in, send a confirmation message, and log out of a device.	Yes			
Manage Presence States: Manage the Presence States available to Users				Yes
Manage User Presence: Manage the XMPP presence of Vocera Users. You can create, edit, and remove the presence states which are presented to XMPP device users.				Yes
Configuration				
Assign User To A Phone: Assign users to a phone. Users can assign themselves and other users to phones, and remove users from phones. By changing your own assignment to a department, you can make assignments in the other departments for which you are responsible.		Yes		

Workflows	End User	Charge Nurse/Department Secretary	Super User	Administrator User
Manage Configurations: Create/remove/edit configurations for a facility. You can define the assignment levels for alert escalation recipients, create one or more configurations using the defined assignment levels, and then associate a configuration with a facility in the network.				Yes
Manage Functional Roles: Manage the functional roles for a facility. You can create, edit, and remove functional roles, as well as deactivate roles, for staffing assignments.				Yes
Manage Locations: You can create, remove, and edit locations for staff assignment.				Yes
Manage Message Quick Responses: You can add, remove, or change pre-defined messages (quick responses) and their categories.			Yes	Yes
Manage Phones: View the phone's current status, assign its default unit, and assign to a user. You can manage phone information for users and default units, list disconnected phones, and view registration history.			Yes	Yes
Monitor Tech				
Manage Monitor Technician: You can create and delete a Monitor Technician, edit the Monitor Technician's identifying number, and assign or change a Monitor Technician's phone association				Yes
Manage Monitor Assignments: You can manage Monitor Technician assignments to patient beds.				Yes
Find Patient and View Department Census: You can view department census, and search	User's unit only	User's unit only	User's unit only	Access all units

Workflows	End User	Charge Nurse/Department Secretary	Super User	Administrator User
for detailed patient information.				