Vocera Messaging Platform Web Console User Guide

Version 5.1.0

Notice

Contents

The VMP Web Console

Learn about the VMP Web Console features.

VMP Web Console Overview

The VMP Web Console provides administrator and user access to the VMP communication platform from your Web browser.

The URL for the VMP Web Console is the DNS entry or the IP address of the VMP Server.

Depending upon the firewall configuration, the VMP Web Console can be opened up to external, off-network users.

Users are assigned access to the VMP Web Console in the VMP Administrator.

Browser Requirements

The VMP Web Console is supported on Internet Explorer version 9 and later.

Logging into the VMP Web Console

To use the VMP Web Console, you must log in using the credentials provided by the VMP Server administrator.
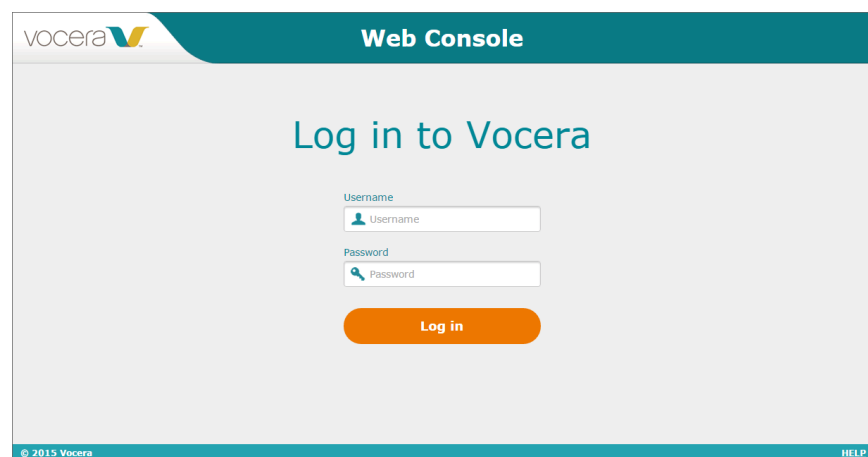
1. In the Username field, type the username provided by the VMP Server administrator.
2. In the Password field, type the password for your username.
3. Click Log in to log in to the VMP Web Console.

The Monitor View

The VMP Web Console Monitor View lists messages sent or received by the users that the administrator has granted you permission to view.

To access the Monitor view, select the Monitor View icon [icon].
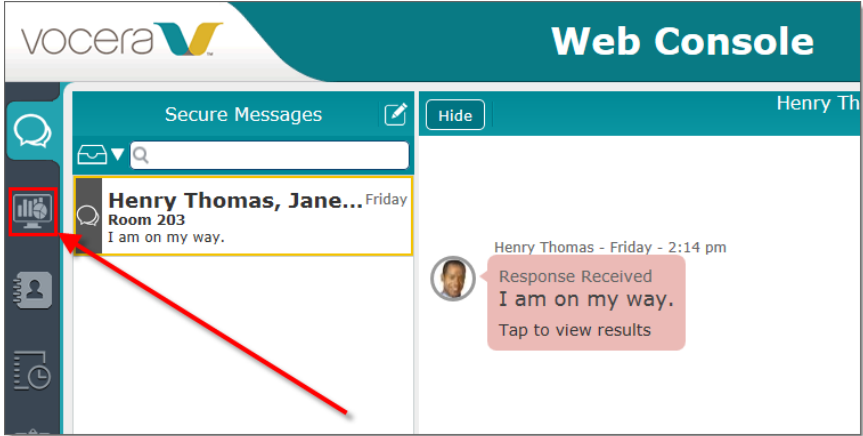
Note: This icon appears only when the Vocera administrator has granted you permission to view either sent messages or received messages.

The Monitor View lists each message.
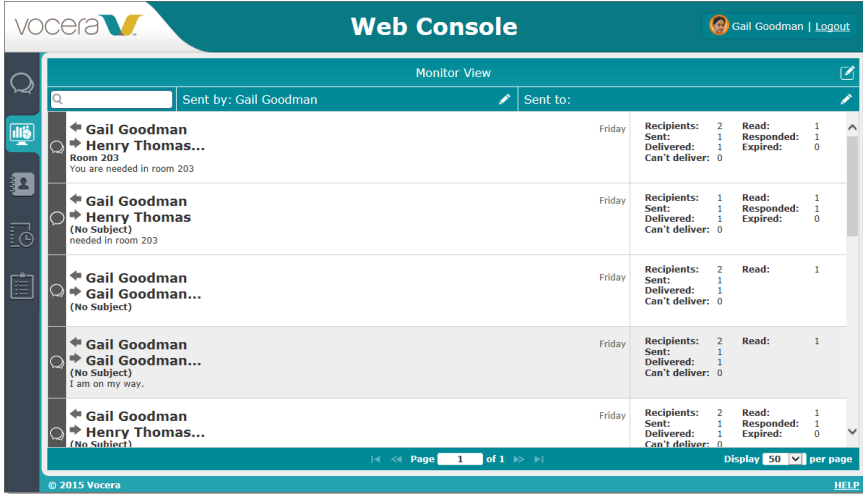
Click a message to display its details.

Monitor View Features

From the Monitor View, you can search for messages, or select the source or recipient of a message.

1	Use the search box to search for messages by: • Sender • Recipient • Subject • Keyword (in the message subject)
2	The Sent by field. Click ✎ to create Sent By filters.
3	The Sent to field. Click ✎ to create Sent To filters.

For more information on using the Sent By and Sent To filters, see **Monitor View Filtering** on page 6.

> **Note:** You cannot view messages sent or received by users other than yourself unless the Vocera administrator has granted you permission to do so.

Monitor View Filtering

In the Monitor View, you can create Sent By and Sent To filters that limit the messages that are displayed on the screen.

1. Do one of the following:
    a. Click ✎ in the Sent by field to edit the Sent By filter.
    b. Click ✎ in the Sent to field to edit the Sent To filter.
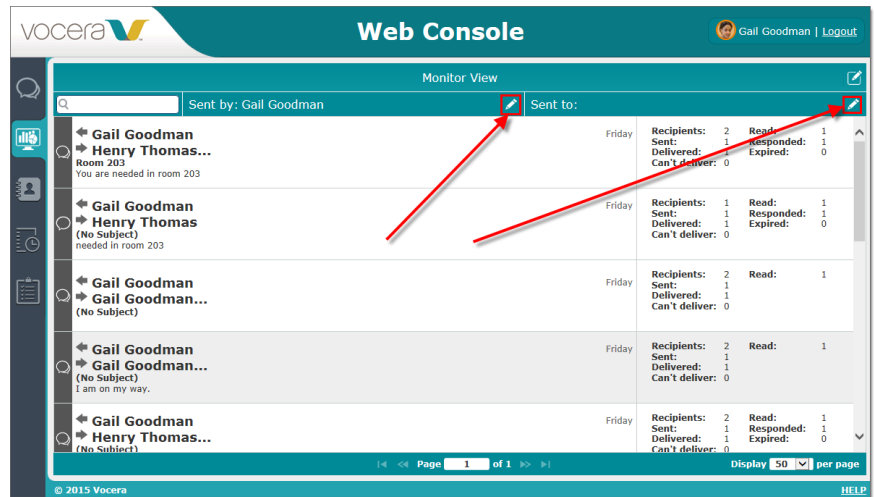
2. In the Select Users/Groups dialog box, select the checkboxes of the users and groups to include in the filter. Click ▸ to add these users and groups.
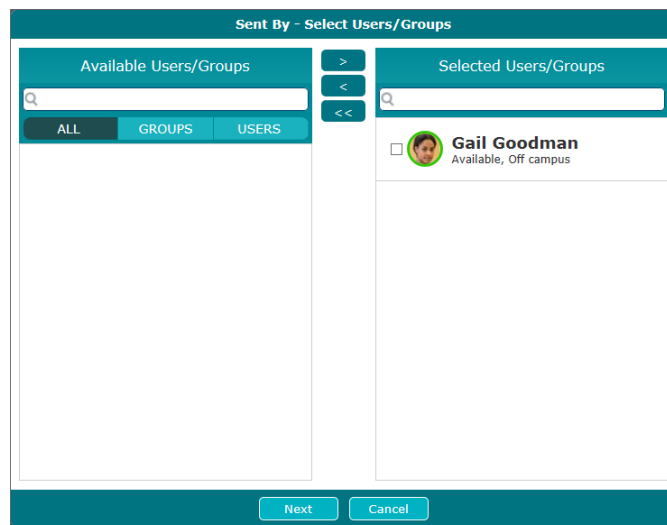
3. To remove users and groups from the filter, click ◂. To remove all users and groups, click ◂◂.

4. Click Next.

5. In the selection tree dialog box that appears, select the checkboxes of the criteria to be matched for messages to appear in the Monitor View. You can select separate criteria for secure messages and for notifications.

6. Click Save to save this filter, or click Cancel to cancel editing the filter. Click Back to return to selecting users and groups.

Web Console Secure Messages

Vocera Messaging Platform users can create or send a secure message to users or Distribution Lists using the VMP Web Console. The console provides an interface for sending messages from your Web browser.

> **Note:** The text of a message can be up to 3000 characters long, and the subject header can contain up to 512 characters. Any ASCII character can be included, but emojis are not supported.

Sending a Message from the VMP Web Console

You can use the VMP Web Console to send a message to any user or Distribution List.

> **Note:** If the message has more than 50 recipients, it is defined to be a Mass Notification. See **Creating a Mass Notification** on page 11 for details.

1. Open the VMP Web Console from your Web browser.
2. Select the Message 💬 icon and click the Compose icon 🖉.
3. To use a message Template, select it from the Templates list. If no Templates are available, or if you do not want to use a Template, select New Text.

4. To add one or more message recipients, either type the recipient name in the To: field, or click ⊕ to select a Distribution List or user recipient.

5. If you have clicked ⊕, in the Select Recipients dialog box, select the checkboxes of the users and Distribution Lists to include as recipients in the filter. Click ▸ to add these recipients.
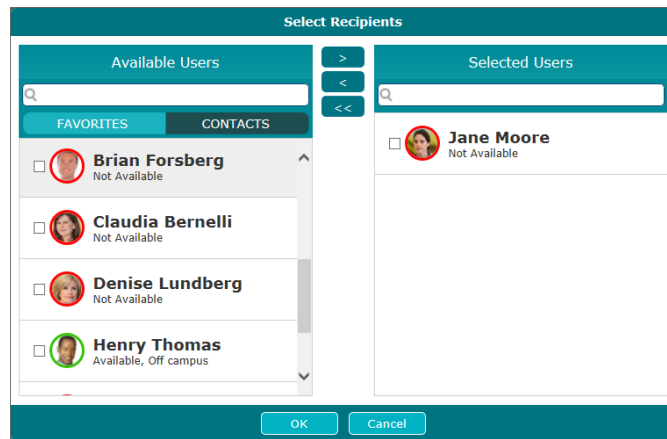
To remove recipients from the recipient list, click ◂. To remove all recipients, click ◂◂.

6. If your message has a subject, type the subject in the Subject field.

7. Click 🚩 Priority to specify a priority for the message. Select one of Normal, High, or Urgent. The following table lists the notifications sent for each priority:

Priority	Notifications in VCS app
Normal	Single ring and vibration
High	Multiple rings and vibrations
Urgent	Multiple rings (overriding user's volume setting) and vibrations

Important: On some devices, messages sent with High or Urgent priority may be spoken out loud to some recipients. Sending confidential patient health information with either of these priorities may violate privacy regulations.

8. Do one of the following:

   a. To send a text message, type the message text in the field at the bottom of the screen and click Send.

   b. To send a photo, click 📎 Attach Media and select the image that you want to send.

   c. To create a message that requires a response, click ↩ Responses. This displays the interface for sending a message that requires a response. See Sending a Message That Requires a Response on page 9 for more details.

Sending a Message That Requires a Response

You can send a message that requires the recipient to provide a response.

1. Open the VMP Web Console from your Web browser.

2. Select the Message 💬 icon and click the Compose icon 📝.

3. To use a message Template, select it from the Templates list. If no Templates are available, or if you do not want to use a Template, select New Text.

4. To add one or more message recipients, either type the recipient name in the To: field, or click ⊕ to select a Distribution List or user recipient.

5. Click ↩ Responses to display the screen for sending a message with a response.

6. Type text in the Subject and Message fields (if they have not already been provided by the Template).

> **Note:** A message must have text in the Message field.

7. Configure the following options, and click Send.
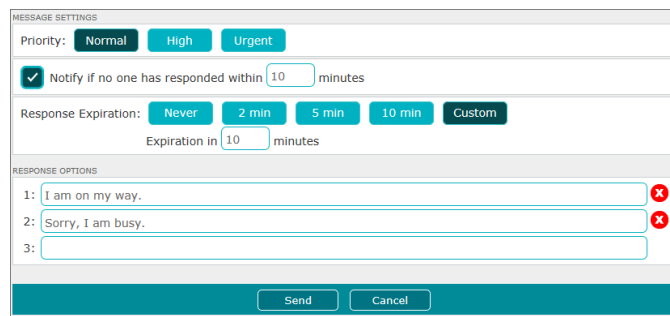
Table 1: Web Console message options

Option	Description
Priority	One of the following: • Normal (the default) • High • Urgent See **Sending a Message from the VMP Web Console** on page 8 for details on how these priority levels are handled in the VCS app. **Important:** On some devices, messages sent with High or Urgent priority may be spoken out loud to some recipients. Sending confidential patient health information with either of these priorities may violate privacy regulations.
Notify if no one has responded	Select this checkbox if you want to be notified when no one has responded within the number of minutes that you specify in the text field. If no one responds to this message during this time period, the Notify Me icon ✹ is displayed in the message link. • If you are logged onto a Vocera badge, the notification is sent as a message on the badge. • If you are logged into a badge and on to the Vocera Collaboration Suite, a tone notification is sent to the badge, and the Notify Me icon is displayed in the message link. • If you are logged into a badge and on to the VMP Web Console, a tone notification is sent to the badge, and the Notify Me icon is displayed in the message link.

Option	Description
Response Expiration	Specify the time period, in minutes, in which responses to this message are allowed. This time period is indicated on the sent message. Select Custom to specify a time period.
Response Options	If the communication requires a response, set multiple choice options to help the recipient respond quickly. When you type an option, a new field appears to enable you to type an additional option if necessary. To delete an option that you have created, click ![X].

8. Click Send to send the message, or click Cancel to return to the message interface described in **Sending a Message from the VMP Web Console** on page 8.

Creating a Mass Notification

When you create a message that has more than 50 recipients, it is automatically treated as a Mass Notification.

When you receive a Mass Notification, the text N Participants is shown as the recipient, where N is the number of recipients.

The list of Mass Notification recipients can be displayed in the VMP Web Console, but cannot be displayed on user devices.

Templates

Templates are predefined messages designed to help users quickly send important communications. Templates are created and managed from the VMP Administrator.

Templates can be:

- Assigned permissions based on group memebership
- Configured to allow the user to edit the message and delivery parameters from the client
- Assigned to users and groups for frequently communicating important messages

Continuing a Message Conversation

After you have sent a secure message in the VMP Web Console, you can continue a conversation with the recipients of the message.

1. Select the Message ![icon] icon.
2. From the list of messages in the Secure Messages pane, select the message. The message is displayed in the pane at the right.
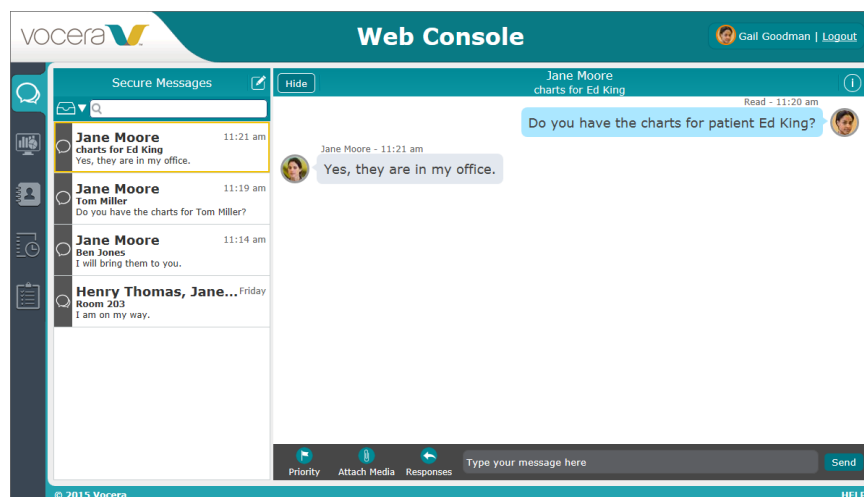
3. In the text field at the bottom of the pane, type your text message and click Send. Your messages and the responses sent to you are displayed.
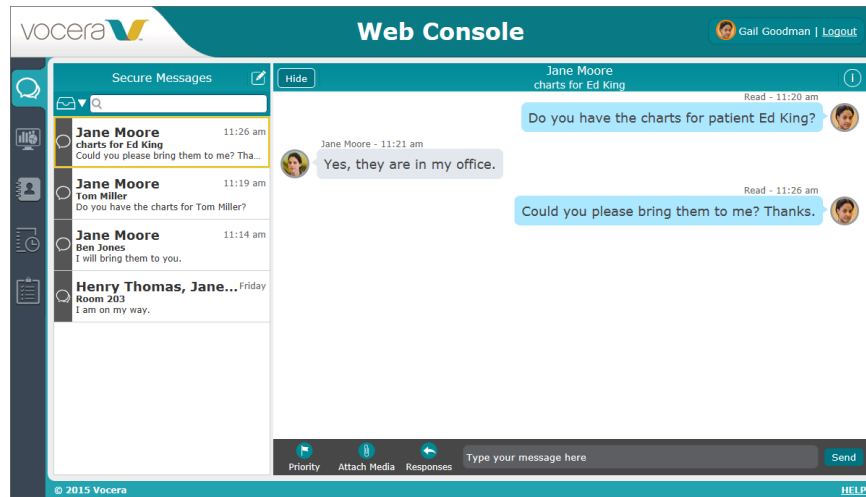
4. To change the priority of a message, click ⚑ Priority and select the priority to use. If the priority is higher than Normal, the priority is included in the message.
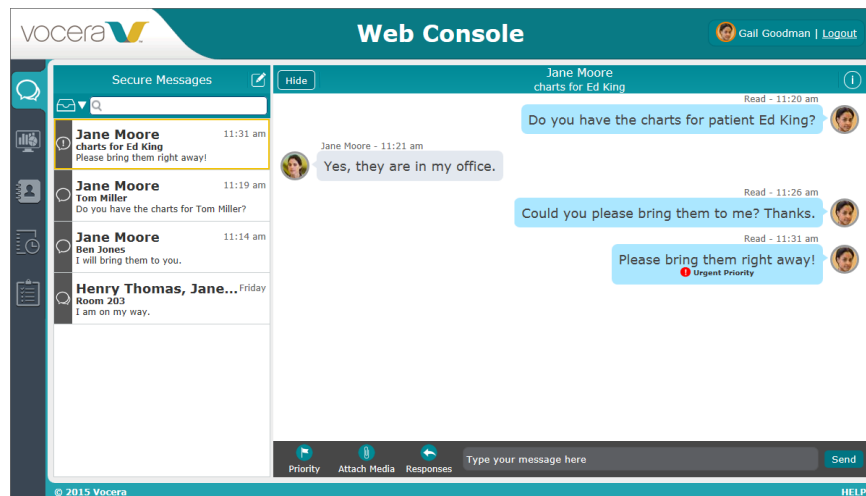
5. To attach media to a conversation, click 📎 Attach Media and select the attachment to include. A thumbnail of the attachment appears in the conversation.
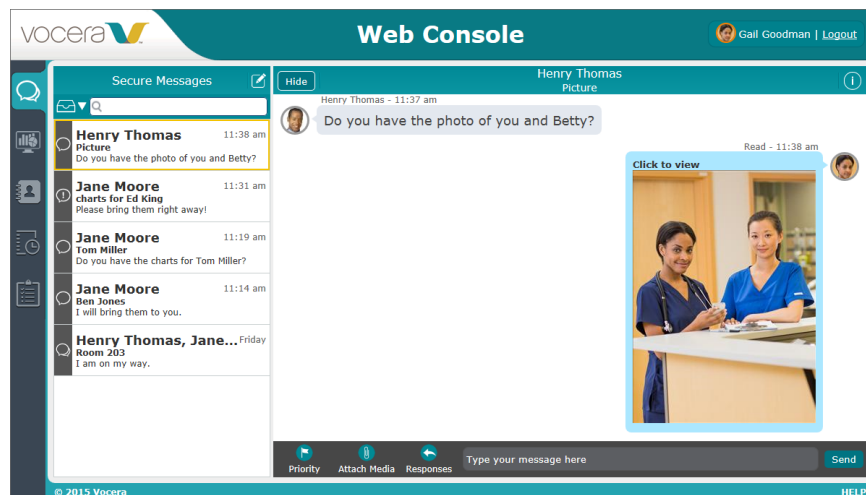
Click the thumbnail to view the attachment in more detail.

6. To request a response to a message, click ↩ Responses. In the Response Request screen, specify the response information, and click Send.
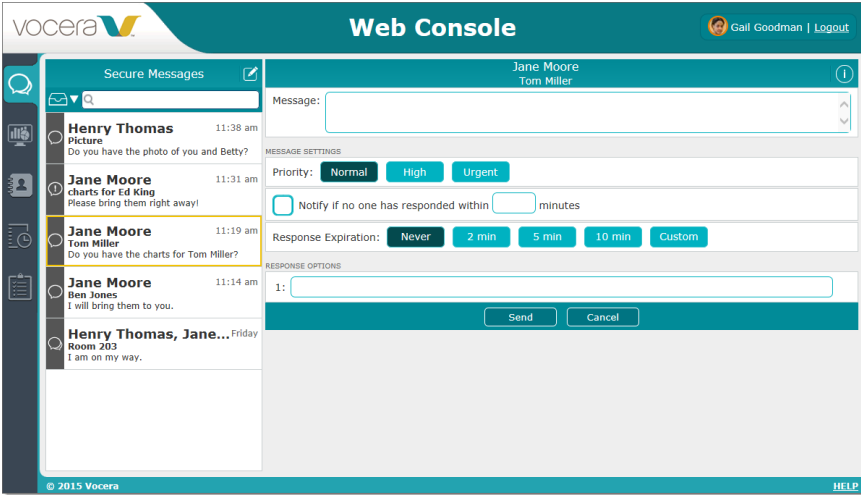
7. If you have been requested to supply a response, a list of response options is provided. Hover over an option to select it, and click the option to send the response.
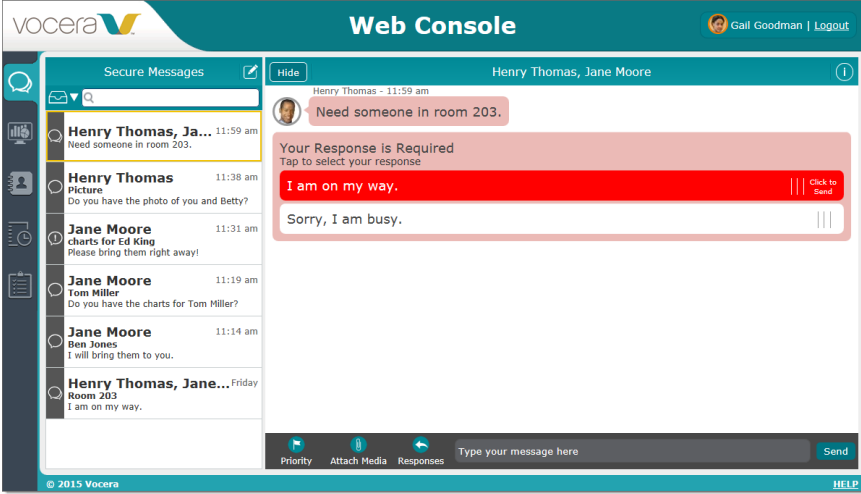
Note: If the sender has specified a time limit for a response, and the time limit has expired, this will be indicated in the conversation:
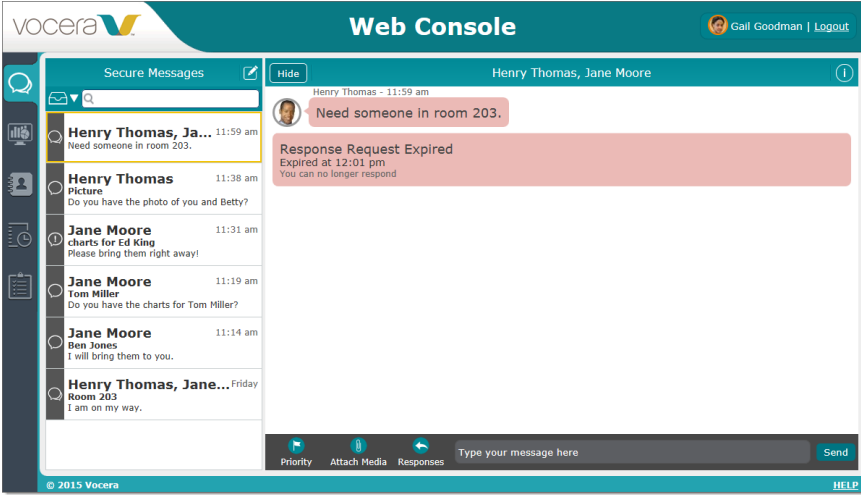
If you are having more than one conversation, use the pane at the left to switch from one session to another.

To display the current message delivery status, click on any text that you have sent in a conversation.

Click on a profile picture to display the contact status information for that person.

Adding a User to a Message Conversation

You can add additional users to an existing message conversation.

1. In the message conversation, click ⓘ.
2. In the To field, type the names of the people that you want to add to the conversation. As you type a name, suggested names may appear. Click on a name to add this person to the conversation.
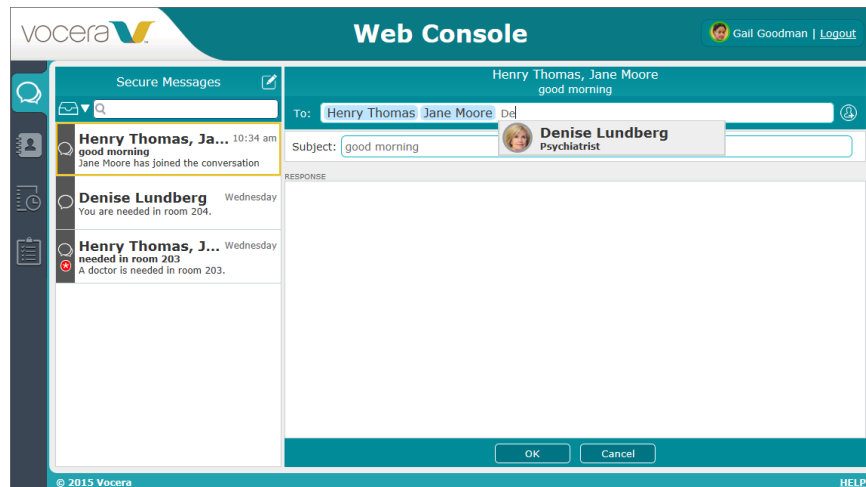
3. Click OK to add the new users to the message conversation.

The conversation now indicates that new people have joined.
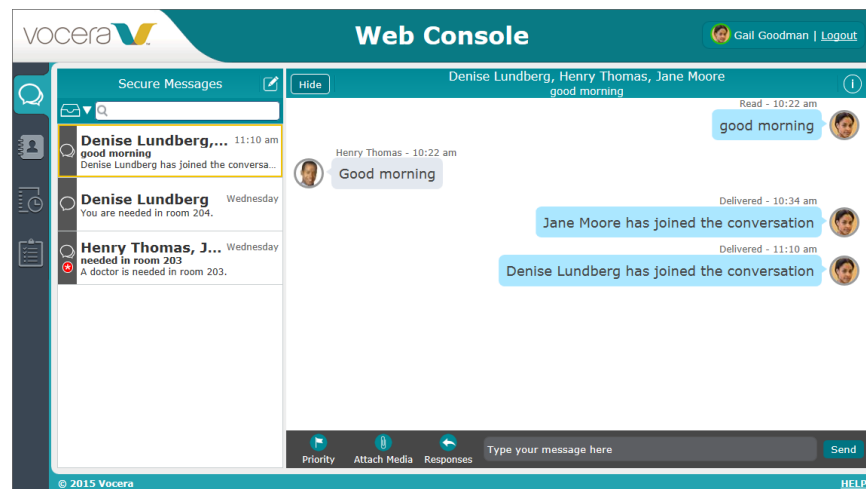
Filtering Message Conversations

You can specify the message conversations that are to be displayed in the Secure Messages screen.

1. Select the Message 💬 icon to display the Secure Messages Screen.
2. Click ✉ to display the filtering options.
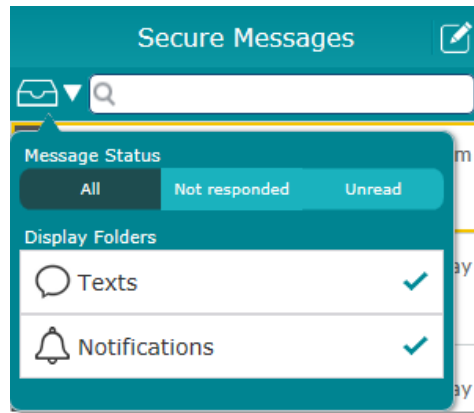
3. In the Message Status section, select whether to display all messages, messages to which you have not responded, or messages that are unread.

4. In the Display Folders section, select Texts to display text conversations, and select Notifications to display notifications. You can select either or both.

5. Click outside of the filtering options popup menu to hide it. The Secure Messages screen is updated to reflect your selections.

Hiding a Message

If you do not need to save a message, you can hide it.

1. Select the Message ⬚ icon.

2. From the list of messages in the Secure Messages pane, select the message that you want to hide.

3. Click Hide.
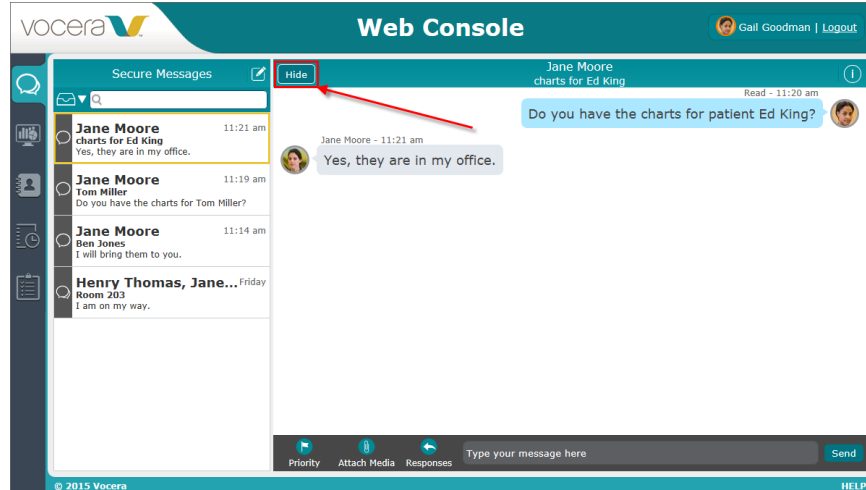
4. In the Hide Conversation dialog box, click Yes to hide the message.

Note: The message reappears if a sender or recipient that has not hidden the message continues the conversation.

Viewing Message Details

You can edit the message recipients or subject, and examine the message responses.

1. Select the Message ⬚ icon.

2. From the list of messages in the Secure Messages pane, select the message for which you want to view details.

3. Click ⓘ.
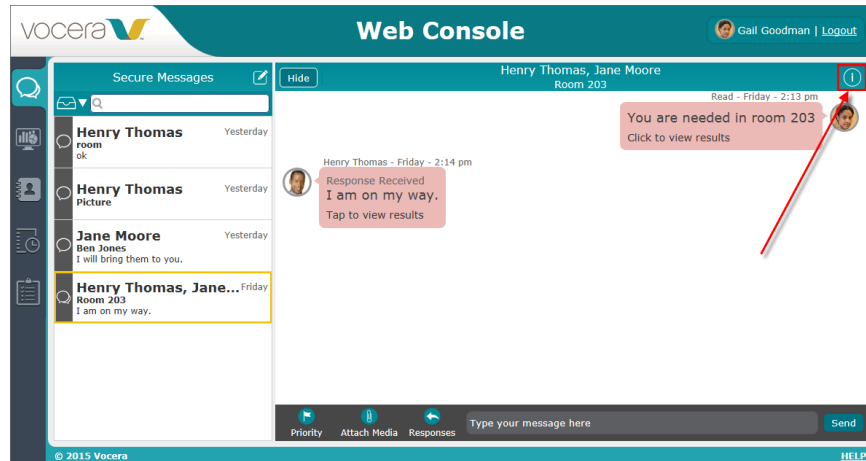
The message details appear:
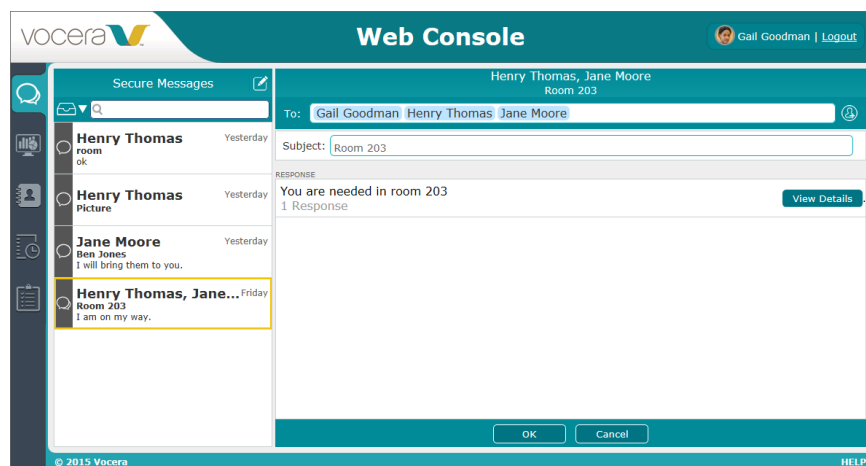
For each recipient, the message status is one of the following:

Response	Description
Queued	The message is waiting to be sent.
Sent	The message has been successfully received for delivery.
Delivered	The message has been successfully delivered to the recipient's device or VMP Web Console session.
Read	The message has been read by the recipient.
Responded	The recipient has responded to the message.
Failed/Can't Deliver	The server could not send the message.
Expired	The message was not delivered within the message expiry time.

4. In the To field, select one or more users to remove from the conversation, or click 🔘 to add users to the conversation.

5. Type in the Subject field to change the message subject.

6. If message responses are provided in the Response section, click View Details to display more information on the users that responded to this message.

7. Click OK to change the message, or click Cancel to cancel your changes and return to the message.

On-Call Status and Schedules

You can use the VMP Web Console to specify on-call status and create schedules.

If On-Call Scheduling has been provided with the VMP Server, and your administrator has given you permission to manage schedules, you can use the On-Call view to update your own on-call status or the on-call status of other users.

You can also use the Schedules view to create schedules based on On-Call Distribution Lists (DLs).

Schedules can be copied from existing schedules, can be drafted and remain unpublished, and can be published at any time.

You can view schedules by:

- Day
- Week
- Month
- Shifts

The Vocera administrator can grant users the right to change their status. See the Vocera Messaging Platform Administration Guide for more details.

Modifying Your On-Call Status

If you are a member of an On-Call Distribution List, a published schedule can be used to determine when you are on call. This schedule automatically sets your on-call status.

You can change your on-call status if this privilege is provided by the Vocera administrator.

1. Open the VMP Web Console from your Web browser.

2. Click On-Call 🗒. This icon appears only if you have access to On-Call Distribution Lists.

3. In the On-Call Lists pane, click My Status. A list of the Distribution Lists to which you belong is displayed, along with your on-call status for each.
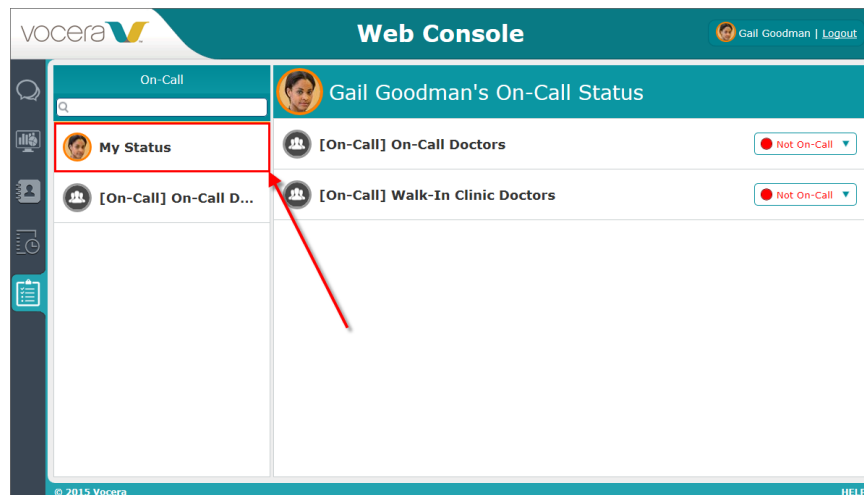
4. For the Distribution List for which you want to change your on-call status, click your current status. A list of options appears.
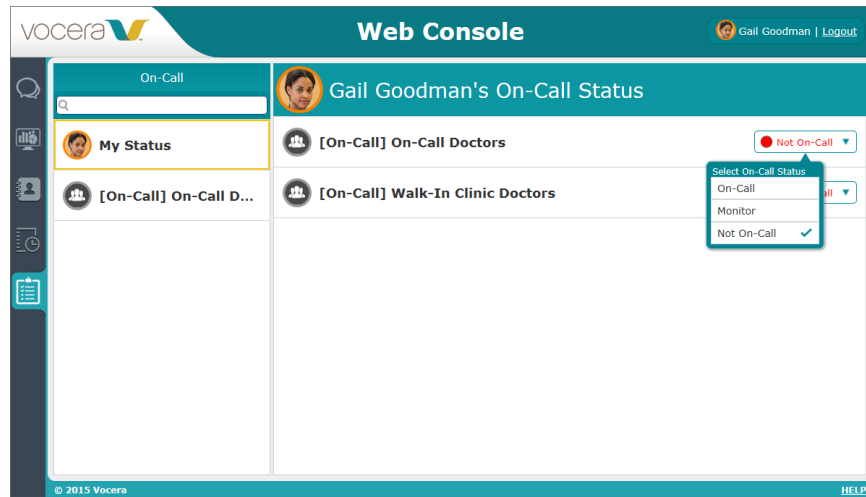
5. Change your status to one of the following:

- • On-Call - Receive messages sent to the list.
- • Monitor - Receive message sent to the list, but a response is not expected even when a message requires one.
- • Not On-Call - Do not receive messages sent to the list.

> **Tip:** Select Monitor to receive messages sent to the list without the expectation of a response or action for the message. A shift manager might find it useful to monitor the shift and ensure that messages are handled appropriately.

Modifying Any On-Call Status

You can modify the on-call status of any user in a Distribution List if the Vocera administrator has granted you this permission.

1. Open the VMP Web Console from your Web browser.
2. Click On-Call 🗒. This icon appears only if you have access to On-Call Distribution Lists.
3. In the On-Call Lists pane, click the Distribution List that you want to update. A list of users is displayed, along with their on-call status.

4. For the user whose on-call status you want to change, click the user's current status. A list of options appears.
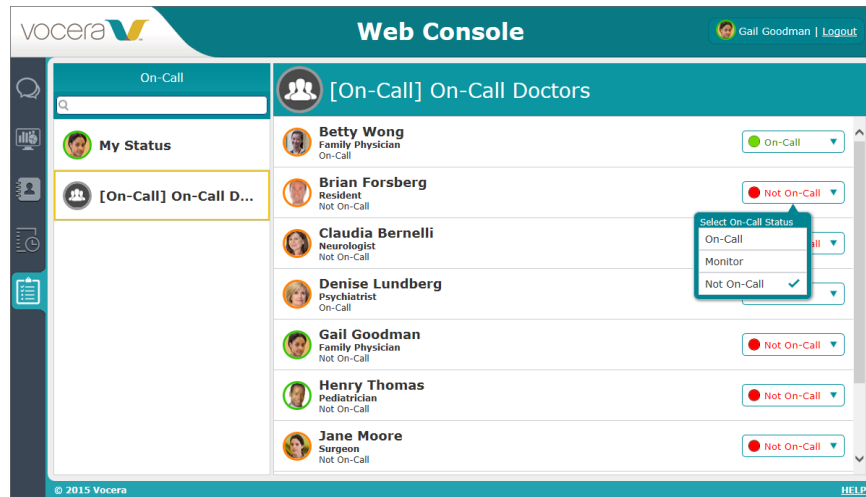
5. Change the user's status to one of the following:

   - On-Call - Receive messages sent to the list.
   - Monitor - Receive messages sent to the list, but a response is not expected even when a message requires one.
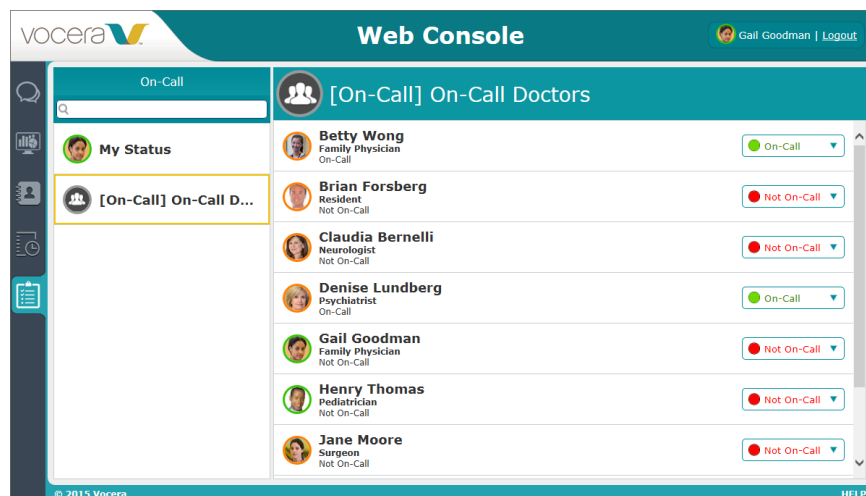   - Not On-Call - Do not receive messages sent to the list.

   Note: At least one user in the Distribution List must have a status of On-Call at all times.

   If you do not want to update a user's on-call status, tap the list name at the top left of the screen to return to the list of users.

6. Repeat the above step until all users have had their on-call status changed as needed.

Creating On-Call Schedules

You can use the VMP Web Console to create an on-call schedule if the VMP system administrator has granted you permission.

1. Open the VMP Web Console in your Web browser.

2. Click the Schedule [icon] icon to display the list of schedules.

3. Click New Schedule.

   Note: If you do not have permission to create on-call schedules, the New Schedule button is not available.

4. Enter a meaningful Schedule Name.

5. Use the Schedule Distribution List dropdown list to select the On-Call Distribution List (DL) for the schedule.

6. Click in the Schedule Start Date field to open the calendar picker and select the start date.

7. If needed, use the Time Zone dropdown list to select the appropriate time zone, or select the Daylight saving checkbox.

8. In the Minimum # of On-Call Users per Shift field, enter the minimum number of users that are to be specified as on-call in each shift.

9. Select the Enable Automatic Validation checkbox if the VMP Server is to perform automatic validation of this schedule to ensure that all shifts have enough on-call users.

10. If you want to copy the shifts for the new schedule from an existing schedule, click to activate the Copy shifts from an existing Schedule checkbox, and select the schedule from the dropdown list.

11. Use the Permissions pane to select Users/Groups with permission to access the schedule. Click to activate the checkbox next to the desired user or group and click > to select.

12. Click OK to continue.

13. Click the name of the schedule to continue editing it.

14. Use the arrow buttons or the calendar picker to select a date for which to schedule shifts.
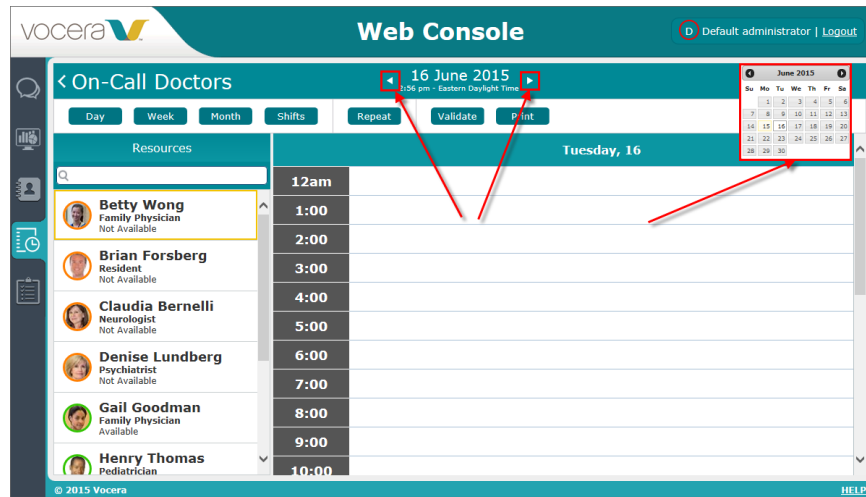
15. To assign a shift to a user, drag the user's name to the time slot that is to be the start of the shift. Use the Shift Period dialog to specify the start and end times for the shift.
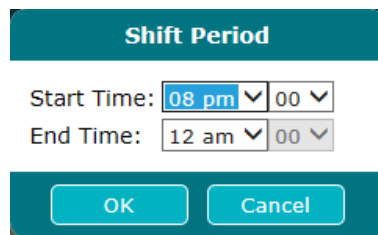
> **Tip:** To change the times for a user's shift, drag the shift assignment to the desired time slot. Drag the bottom of the shift assignment to increase the number of assigned hours.

16. Repeat the above step to add users to the schedule as appropriate. You can schedule more than one user in any time slot.

17. When you have finished creating the shift assignments, click Repeat to copy these assignments to other days of the month:
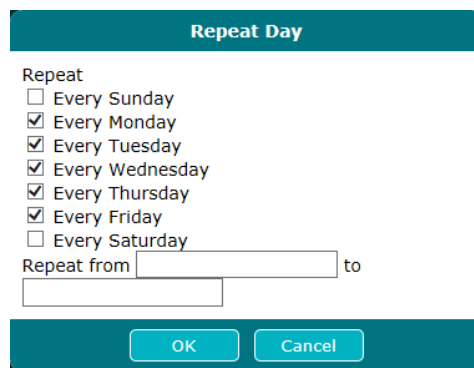
a. Use the checkboxes to specify the days of the week on which these shifts are to be assigned.

b. Click in the Repeat from field to specify the start of the date range in which these shifts are to be assigned.

c. Click in the to field to specify the end of the date range.
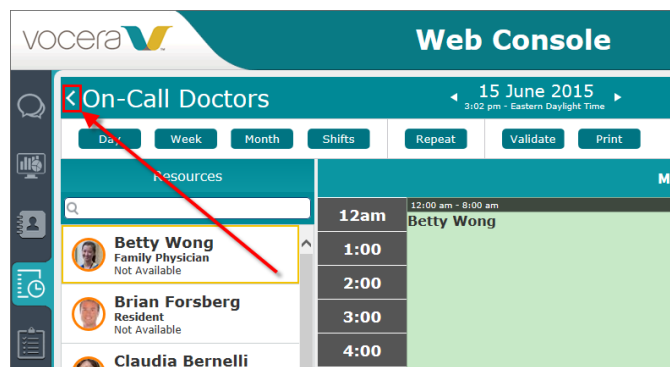
d. Click OK.

18. Click Week or Month to view the shift assignments for a specific week or month. To view the shift assignments for a specific user, click Shifts and then click the user's name.

In the Week or Month view, you can copy shift assignments from one day to another:

a. Locate the day of the month whose shift assignments you want to copy. Click on the heading for that day of the month to highlight it.

b. Click Copy.

c. Locate the day of the month to which you want to copy the shift assignments. click the heading for that day of the month to highlight it.

d. Click Paste. The shift assignments are copied to the specified day.

19. To ensure that all shifts have enough on-call users, click Validate. This checks all days for which shifts are scheduled, up to the (possibly partial) last day. A pop-up dialog appears that either lists the shifts for which not enough on-call users are defined or indicates that the schedule is valid.

20. When the schedule is complete, click the back arrow to return to the Schedule list.

21. Select the Published checkbox to publish the schedule.

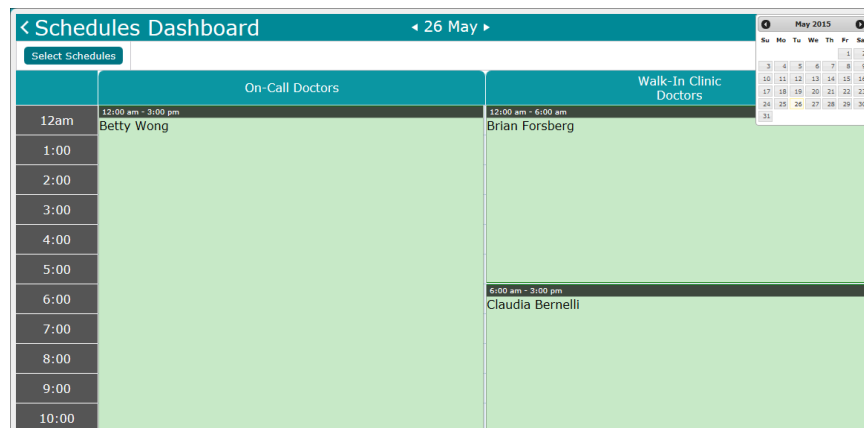## Viewing the Schedule Dashboard

From the VMP Web Console, you can view the Schedule Dashboard, which lists any or all the schedules that you have created and who has been assigned shifts in these schedules for any specific day.

1. Open the VMP Web Console in your Web browser.

2. Click the Schedule icon.

3. Click Dashboard.

4. Click Select Schedules.

5. To select a schedule, go to the Available Schedules pane, select the checkbox next to the schedule, and click >. To unselect a schedule, go to the Selected Schedules pane, clear the checkbox next to the schedule, and click <.
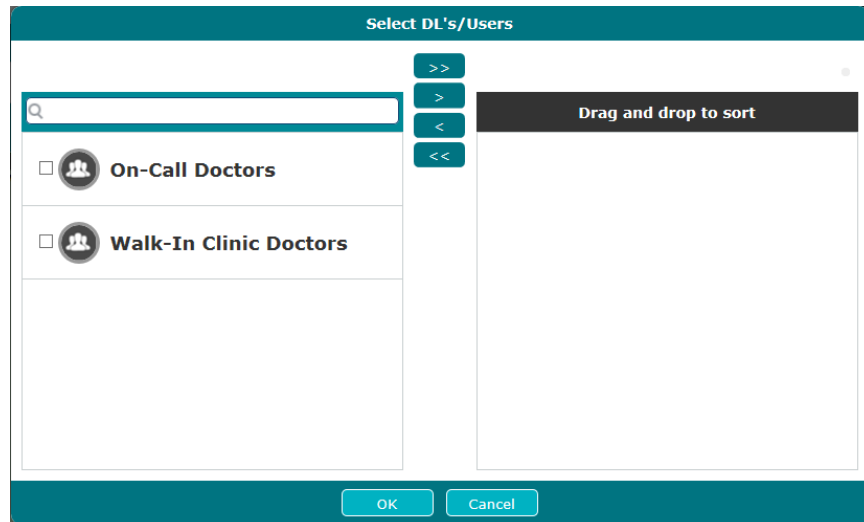
You can select a maximum of 20 schedules.

6. To change the order in which the schedules are to be displayed, drag and drop the schedules in the Selected Schedules pane as needed.

7. Click OK. The Schedule Dashboard now displays the schedules that you have selected. For each schedule, the shifts assigned for the current date are displayed.

8. To view the shifts for a different date, select the date from the calendar at the top right of the Schedule Dashboard, or use the ◀ and ▶ icons to navigate to the date that you want to display.

9. Click ◀ to return to the list of schedules.

Printing a Schedule

You can print a schedule that you are editing. The portion of the schedule that is printed is identical to the portion that you are viewing. For example, if you are viewing the schedule for the current week, the printed schedule is for that week.

1. Open the VMP Web Console in your Web browser.

2. Click the Schedule ⊞ icon.

3. Click the name of the schedule to display.

4. Click one of Day, Week, or Month to display the schedule for that time period.

5. Click Print. A print window appears that displays the schedule to be printed.

6. In the print window, click Print. This displays the Windows print command window. From this window, select the desired printer and options.

The VMP Web Console

Web Console Contacts

The Web Console Contacts view shows all contacts the logged in user is allowed to access.

Note: Contact access is defined in the VMP Administrator.

Using Web Console Contacts

Use the VMP Web Console Contacts view to initiate a communication with a contact.

The Email option is available only for users, and is available only if the VMP Server administrator has allowed email communication. Only messages can be sent to group contacts.

1. Log on to the VMP Web Console from your Web browser.
2. Click the Contacts ![icon] icon to display the Contacts view.
3. Toggle between Favorites or Contacts at the top of the Contacts pane.
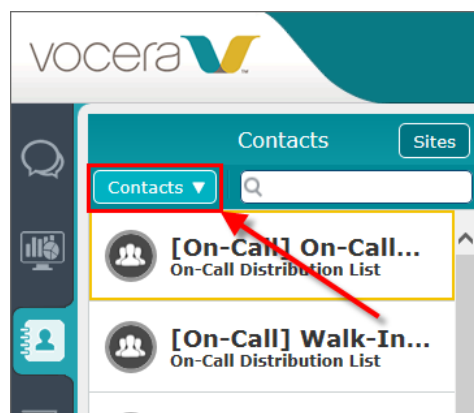
Tip: Start typing the contact name in the search box to quickly find a user, group, or Distribution List. For details on using Favorites, see **Using Web Console Favorites** on page 25.

Select a Contact to display it:
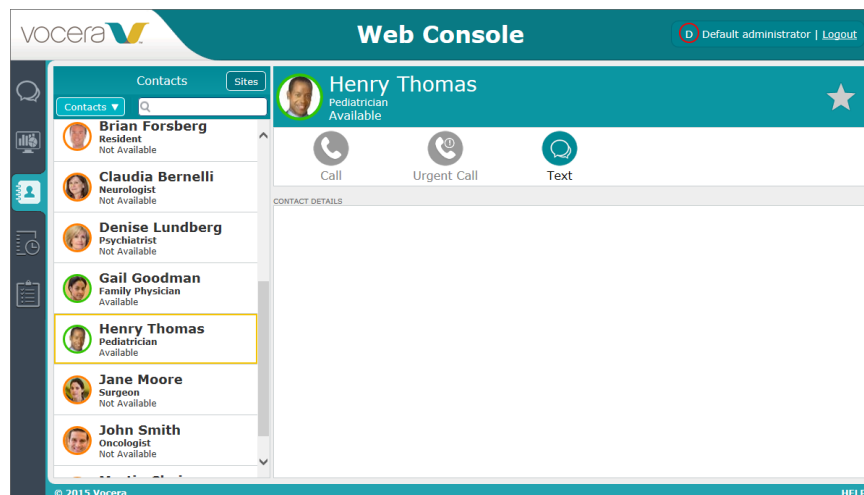
4. If a contact is a Vocera Voice Group, the group may contain subgroups. Click the subgroup you want to view. When viewing a subgroup, click ![icon] to return to the parent Voice Group.
5. When you have found the Contact, select Call, Urgent Call, or Text to communicate with the Contact.

Note: The Call and Urgent Call operations are initiated on your client application (VCS client or Vocera badge).

Contact Types and Status

Vocera categorizes contacts as individual users, Voice Groups, and Distribution Lists. Voice Groups and Distribution Lists are indicated with a 👥 icon. For each Vocera user, a photo of the user is displayed, or the user's initials if no photo is available.

A colored ring around the user's photo or initials indicates the availability of the contact:

- Green indicates that the contact is available.
- Yellow indicates that the contact is in Do Not Disturb mode for calls, messages, or both. Details on the user's Do Not Disturb status are provided with the contact's name and title.
- Red indicates that the contact is not available.

Using Web Console Favorites

In the VMP Web Console, you can specify a list of Favorite contacts that you communicate with frequently.

To display the list of Favorites, select Favorites at the top of the Contacts pane.
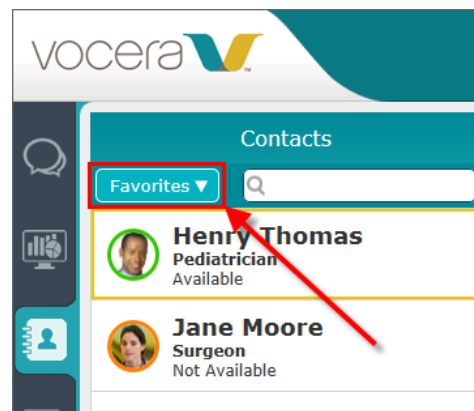
Adding a Favorite

You can add a contact to the list of Favorites.

Note: If a Favorite is a Vocera user, the contact status for the user is displayed in the Favorites list. This lets you quickly determine if the Favorite is logged in to the Vocera system. See **Contact Types and Status** on page 25 for more information on contact status.

1. Click the Contacts 🖼 icon to display the Contacts view.
2. Select Contacts at the top of the Contacts pane to display all contacts.
3. Select a contact from the displayed list.

   **Tip:** Start typing the contact name in the search box to quickly find a user or group.

4. Click the star icon ☆ located at the top right of the contact. This changes the star to yellow, which marks this contact as a Favorite. The VMP Web Console adds the contact to the Favorites list.
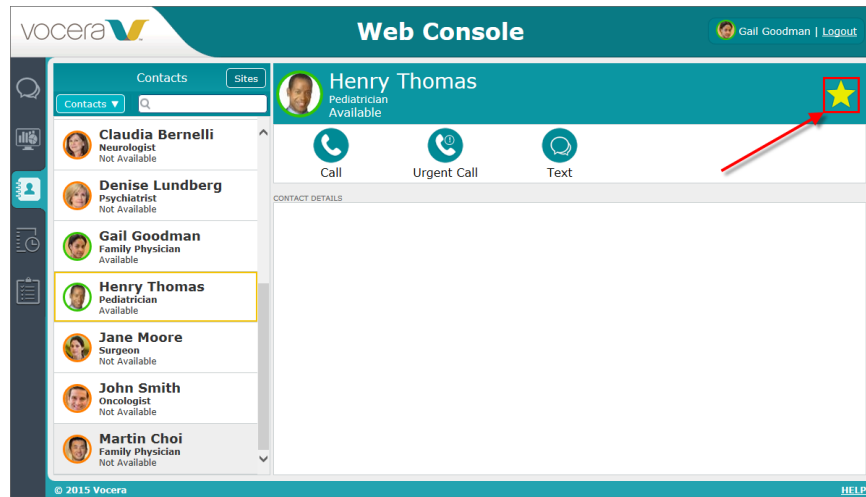
Displaying Contacts in Sites

If contacts have been organized into sites, you can specify which sites are to be displayed in the Contacts list.

1. Click the Contacts [icon] icon to display the Contacts view.
2. Click Sites.
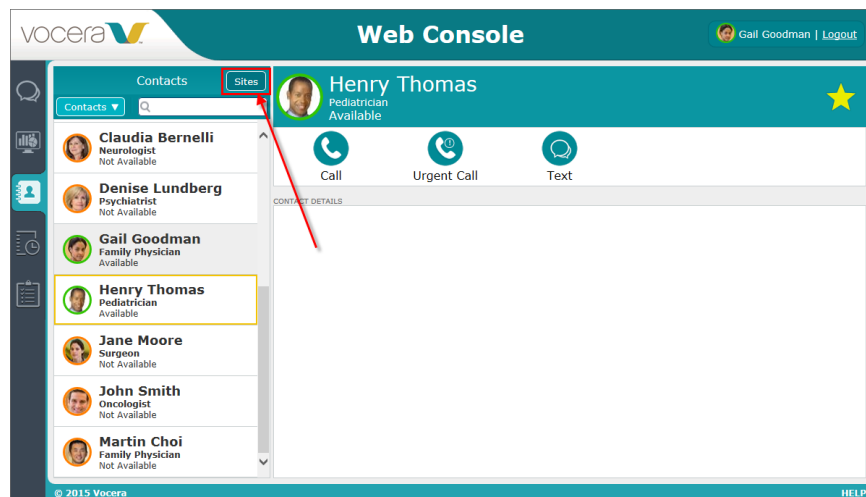
3. In the list of sites that appears, select or clear the sites to display.

Calling a Contact

If you are logged in to the Vocera Collaboration Suite, you can call a contact from the VMP Web Console.

1. Log on to the VMP Web Console from your Web browser.
2. Click the Contacts [icon] icon to display the Contacts view.
3. Click the name of the contact to which you want to place a Call. The screen for this contact displays the ways that you can communicate with the contact.
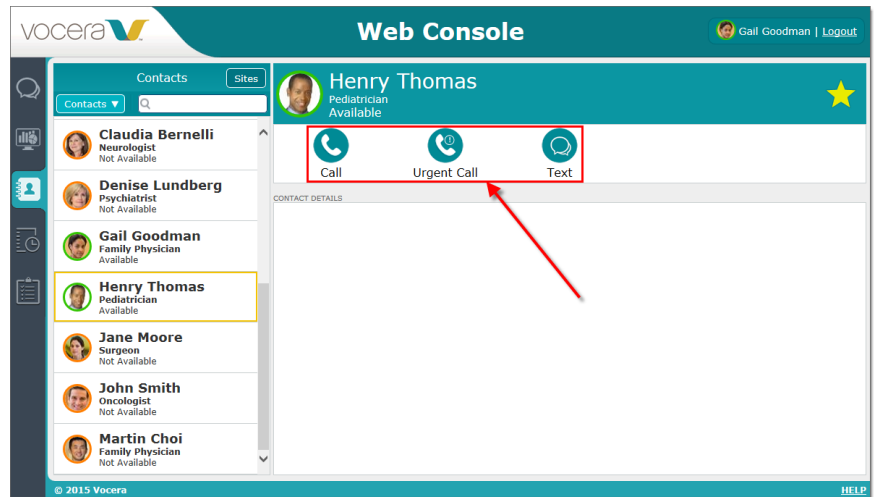
4. Click Call to place a call to the contact, or click Urgent Call to place an urgent call to the contact. This call behaves exactly as if you had originated it from the device.