Staff Assignment Guide

Version 4.4.4

v o c e r a

Contents

What's New

The following topics describe the new features in this version of the Staff Assignment. See the Vocera Server Release Notes for a complete list of changes for this version.

This release includes the following new features and enhancements:

Active Directory Sign On

Users now have the option to login to Staff Assignment using Active Directory credentials. This option must be configured by the system administrator.

Windows 2012 Support

The Vocera Server is now supported on the Windows 2012 platform. On Windows 2012, you must use "Run as administrator" to start the Vocera Server and to edit any text files that the server uses. For best results, use the Services window to start the Vocera Server.
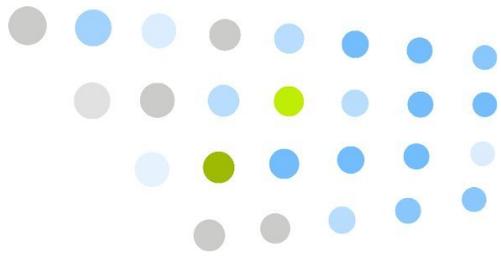
Introduction

Staff Assignment is a Web application hosted on the Vocera Server. It allows you to quickly assign staff members to Vocera groups, which can be role-based or they can represent a coverage area, such as a hospital room or bed. For example, you can use Staff Assignment to assign nurses to beds for different hospital units during a shift.

Hospital staff assignments are typically made by a charge nurse, unit secretary, or ward clerk. These assignments can be made based on location or expertise, or for continuity purposes.

Using the Staff Assignment application to assign nurses is more efficient than using Vocera commands to add nurses to bed groups. It allows you to

• Ensure that every bed has proper coverage

• Ensure that Vocera call flows work properly based on assignments

• Print a report of bed assignments

About This Guide

This guide is intended for anyone using Staff Assignment to assign hospital staff members to patient beds. It is also intended for Vocera system administrators who need to set up the application.

Browser Requirements

To access Vocera Voice Web applications (Administration Console, User Console, Report Console, and Staff Assignment), your computer must have the following required software:

Table 1. Web application software requirements

Applications	Client-side component	Requirement
All applications	Browser	Internet Explorer version 7, 8, or 9. Internet Explorer versions 10 and 11 are supported in compatibility mode.
Administration Console Report Console	Java Runtime Environment (JRE)	JRE 6.0 (1.6) from **www.java.com**

Important: Do not install another JRE on the Vocera Server or Vocera Report Server machines. The required version of Java is installed with those servers.

Browser Security Requirements

Configure the following Internet Explorer security settings:

- **Configure the Internet Explorer security level to Medium-low or lower** – Otherwise, Internet Explorer prevents the scripts used by the consoles from executing completely. You can configure security settings through **Tools > Internet Options > Security** in Internet Explorer. See your Internet Explorer documentation for complete information.

- **Disable the pop-up blocker** – Vocera consoles display information in pop-up windows, so disable pop-up blocking in Internet Explorer (that is, configure the browser to allow pop-up windows). Choose **Tools > Internet Options > Privacy**, and then uncheck the **Turn On Pop-Up Blocker** box.

  If you are using a third-party tool to block pop-ups, refer to the tool's documentation.

- **Remove scroll bars from pop-up windows** – Pop-up windows may display scroll bars. To remove the scroll bars, choose **Tools > Internet Options > Security**, and select the **Local Intranet** zone. Click **Custom Level** to display the Security Settings dialog box. Enable **Allow script-initiated windows without size or position constraints**.

- **If necessary, add the Vocera Server and Vocera Report Server IP addresses to the list of Trusted Sites** – The security policy in certain situations may prevent you from setting the Internet Explorer security level for the local intranet below Medium. If Internet Explorer continues to display pop-up windows with scroll bars, follow these steps to configure a trusted site for the Vocera Server:

To add the Vocera Server and Vocera Report Server to the list of trusted sites:

1. In Internet Explorer, choose **Tools > Internet Options**. The Internet Options dialog box appears.

2. Click the **Security** tab.

3. Click **Trusted Sites**.

4. In the **Security Level for this Zone** box, set the security level to Medium-low, and click **Apply**.

5. Click the **Sites** button. The Trusted Sites dialog box appears.

6. Type the IP address of the Vocera Server, and click **Add**.

7. Type the IP address of the Vocera Report Server, and click **Add**.

8. Click **Close** to close the Trusted Sites dialog box.

9. Click **OK** to close the Internet Options dialog box.

A system administrator can manage the Internet Explorer Trusted Sites for an entire organization using Group Policy Objects (GPOs). See the following Microsoft article for more information:

- **How to Configure Internet Explorer Security Zone Sites Using Group Polices**[1]

- **Do not access a Vocera Voice Web application from the server on which it is running** – By default, Windows Server 2003 and Windows Server 2008 ship with Internet Explorer Enhanced Security Configuration enabled, which may display frequent security prompts when you access a Web application from the server on which it is running. Rather than disable Internet Explorer Enhanced Security Configuration on the server, we recommend that you access Vocera Voice Web applications from your desktop or laptop computer.

- **If your Vocera Server or Vocera Report Server has enabled SSL, configure Internet Explorer to NOT save encrypted pages to disk** – If you enable SSL on the Vocera Server or Vocera Report Server, you may need to update the browser security settings for Internet Explorer to make sure the browser does not save encrypted pages to disk. Otherwise, certain pages of the Administration Console, such as the Permission Browser, will not work properly.

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[1] http://blogs.msdn.com/b/askie/archive/2012/06/05/how-to-configure-internet-explorer-security-zone-sites-using-group-polices.aspx

To update Internet Explorer security settings for SSL access:

1. In Internet Explorer, choose **Tools > Internet Options > Advanced**.
2. Make sure the **Do not save encrypted pages to disk** option is checked.
3. Click **OK**.
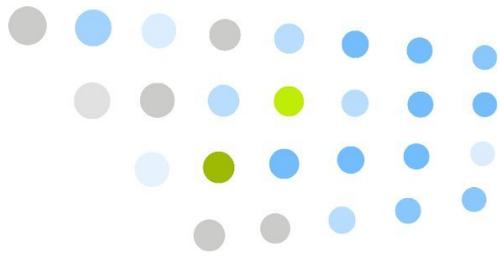
Using Staff Assignment

This section describes how to use Staff Assignment.

Logging In and Out

You can run Staff Assignment within the Internet Explorer browser on any Windows-based computer on the network.

By default, only Vocera users with System Administration permission can log into Staff Assignment. A Vocera system administrator is responsible for setting up the application to allow other users to access Staff Assignment. If you do not have System Administration permission, ask the Vocera system administrator for your Staff Assignment user name and password.

To use Staff Assignment Premier features, you must log into Staff Assignment with your Vocera user ID and password or your Active Directory credentials.

Note: Before using Staff Assignment, make sure the Internet Explorer security level is set to Medium-low or lower. See **Browser Security Requirements** on page 8.

To log into Staff Assignment using Vocera credentials:

1. Open an Internet Explorer browser window.
2. Enter the following URL:

   Table 2. Staff Assignment URLs

Type of Access	URL
Unencrypted	http://*vocera_ip_address*/staffassignment
SSL	https://*vocera_ip_address*/staffassignment

   where *vocera_ip_address* is the numeric IP address of the Vocera server.

   The Staff Assignment login page appears.

3. Enter your Staff Assignment user name and password.

Note: If you don't know your Staff Assignment user name and password, check with your Vocera system administrator.

- If you have a Vocera ID and have System Administrator permission to Vocera, enter your Vocera ID and password to log in.

  Note: You can also use Active Directory credentials to login. For more details see, **Logging In Using Active Directory Authentication** on page 12.

4. Click **Login**.

After you are connected, the Staff Assignment page opens.

To log out:

- Click the **Log Me Out** link at the upper right part of the page.

Logging In Using Active Directory Authentication

If Active Directory authentication is enabled, Staff Assignment users must sign on using Active Directory credentials and select the Active Directory domain.

Note: If Active Directory authentication in enabled, you cannot log in using other system credentials. If you are unable to log in, contact your Vocera system administrator.
Do not manage authentication type using the security options when Active Directory authentication is configured. For details about configuring Active Directory, see the Vocera Administration Guide.

To log into Staff Assignment using Active Directory credentials:

1. Open an Internet Explorer browser window.

2. Enter the following URL:

Table 3. Staff Assignment URLs

Type of Access	URL
Unencrypted	http://*vocera_ip_address*/staffassignment
SSL	https://*vocera_ip_address*/staffassignment

where *vocera_ip_address* is the numeric IP address of the Vocera server.

The Staff Assignment login page appears.

3. Specify the following values:

Field	Description
User Name	Enter your Active Directory user ID (up to 249 characters).
Password	Enter your Active Directory password (up to 127 characters).
Active Directory	Select the name of your Active Directory from the list.
	If there are multiple Active Directories listed and you're unsure which one to select, ask your system administrator.

4. If your deployment hosts more than one domain, select your domain from the list.

5. Click **Login**.

After you are connected, the Staff Assignment page opens.

Connecting to a Vocera Cluster

If you have a Vocera Cluster, the *vocera_ip_address* that you use to log into Staff Assignment can be the IP address of any one of the servers in the Vocera Cluster. The Staff Assignment application automatically connects to the active node.

If you try to connect to a Vocera Server node that is currently in standby mode, the application automatically redirects the browser to the active Vocera Server. You can then log into the application.

> **Best Practice:** If your Vocera Server is clustered, bookmark the Staff
> Assignment URL for each cluster node so that you can connect to Staff
> Assignment in the event that one of the servers is currently down or is in the
> process of being restarted.

Assigning Staff Members or Groups to Units

The **Staff** tab allows you to assign staff members and groups to each hospital
unit. Before you assign staff members to patient beds, you should make sure
that the correct list of available staff members has been assigned to the hospital
units. The charge nurse or ward clerk may assign staff members to units.

Note: By default, the Staff tab is visible only to Administrators.

Nurses and other staff members can float from site to site. Accordingly, you may
need to assign a staff member to a unit from a different site. If so, use the **Find
Staff** field to find a staff member at another site.

Note: Up to 200 staff members or groups can be assigned to each unit. When
you assign a group to a unit, only direct members of the group are assigned;
members of nested groups are NOT assigned, primarily for performance
reasons.

To assign staff members or groups to units:

1. On the **Staff** tab, select a site from the **Site** list.

   Note: By default, your home site is automatically selected unless you
   logged in as an administrator.

2. Select a unit from the **Unit** list.

3. To add staff members or groups to the unit:

   a. Select one or more staff members or groups in the **Staff and Groups
   in Site** list. Group names display in all capital letters to distinguish them
   from individual staff members.

   To select contiguous staff members or groups in the list, press Shift
   +click.

   To select noncontiguous staff members or groups in the list, press Ctrl
   +click.

   To find a user or group in the site, start typing a user's last name or a
   group name in the find text box. A drop-down list appears with up to
   10 matching users or groups. Select one from the list.

If it is a long list, use navigation controls below the list to see the next or previous 200 members.

b. Click the ›› button to move staff members or groups selected in the **Staff and Groups in Site** list to the **Assigned To Unit** list.

4. To remove staff members or groups from the unit:

a. Select one or more staff members or groups in the **Assigned To Unit** list.

b. Click the ‹‹ button to move staff members or groups selected in the **Assigned To Unit** list to the **Staff and Groups In Site** list.

To find a staff member in all sites:

1. On the **Staff** tab, select a site from the **Site** list.

2. Select a unit from the **Unit** list.

3. In the **Find Staff** field, start typing the last name of a staff member. A drop-down list of up to 10 matching names appears.

4. Select a staff member from the list.

5. If the Add To Unit dialog box appears, click **Yes** to add the staff member to the unit. Otherwise, click **No**.

If the Found In Unit dialog box appears, click **Yes** to remove the staff member from the unit but not from any beds contained in the unit. Otherwise, click **No**.

Assigning Staff Members to Beds

The **Assignments** tab allows you to assign up to eight staff members to each bed or role in a hospital unit, although your system may be configured to allow fewer than eight assignments. The list of staff members you can assign is defined by the unit. If you cannot find a person in the list, you can also use the **Find Staff** field to find any staff member. If a staff member that you find is currently not assigned to the unit, you can choose to add him or her.

Nurses are typically assigned to multiple beds. However, you cannot assign one staff member multiple times to the same bed.

Note: In the Vocera Administration Console, the system administrator or group manager can assign more than eight staff members (users) to a bed (group).

To assign staff members to a bed:

1. On the **Assignments** tab, select a site from the **Site** list.

2. Select a unit from the **Unit** list.

3. Select one of the staff member cells for a bed.

4. Select a staff member using one of the following methods:

   • Start typing the last name of a staff member. A drop-down list appears with up to 10 matching names. If the staff member you are looking for does not appear in the list of 10 matches, refine your search by typing additional characters of the last name. Select a staff member from the list.

   • Double-click the cell or press Ctrl+U. The Available In Unit dialog box appears. Select a name from the list and click **OK**.

   • Copy and paste the assignment from one cell to another.

5. Optionally, enter notes (up to 500 characters) about the patient in the **Notes** cell.

To copy and paste assignments:

1. Select a cell where a staff assignment has already been made for a bed or role.

2. Right-click the cell, and choose **Copy**.

   -or

   Select the cell, and press Ctrl+C.

3. Right-click another cell, and choose **Paste Name**.

   -or

   Select another cell, and press Ctrl+V.

To find a staff member in all sites:

1. On the **Assignments** tab, select a site from the **Site** list.

2. Select a unit from the **Unit** list.

3. Make sure the **Lock** checkbox is unchecked. Otherwise, the **Find Staff** box is not visible.

4. In the **Find Staff** box, start typing the last name of a staff member. A drop-down list appears with up to 10 matching names.

5. Select a staff member from the list.

6. If the Add To Unit dialog box appears, click **Yes** to add the staff member to the unit and the current cell. Otherwise, click **No**.

If the Found In Unit dialog box appears, click **Yes** to remove the staff member from the unit, or click **No** to keep the staff member. If you click **Yes**, the Add to Unit dialog appears asking whether you want to add the member to the cell or not.

Tips for Using the Assignments Tab

Follow these guidelines when working on the Assignments tab:

• Navigate using the arrow keys, Tab key, or Enter key, or click a cell to select it.

• Enter a staff member in one of the staff member columns by starting to enter their last name.

• You must assign staff members to a bed or role from left to right, from **1st Member** to **8th Member**. The previous staff member columns for a bed or role must all have assignments before you can make an assignment in the current column. For example, you cannot assign a staff member to the **8th Member** column until staff members have been assigned to the **1st Member** through **7th Member** columns.

• If you delete a staff member for a bed, the staff member in the next column automatically moves one cell to the left to replace the staff member you deleted.

• You cannot select duplicate staff members for a bed.

• To search for a staff member, begin typing a name in one of the staff member cells. A drop-down list of up to 10 matching names appears. For example, to display all available staff members whose last name begins with "Be", type **be** in the cell.

   To select a staff member from the drop-down list, move the mouse over the name and then press Enter or click the name.

• Only valid Vocera user names can be entered or selected in the staff member cells. If you enter anything else in those cells, the value will not be saved.

• To select a staff member from a list of all of the available staff for the unit, double-click the cell or press Ctrl+U. The Available In Unit dialog box appears.

• Use the **Find Staff** field to find staff members at all sites.

   • If you select a staff member who is already assigned to the unit, the Found In Unit dialog box appears. Click **Yes** to remove the staff member from the unit. Otherwise, click **No**.

   • If you select a staff member who is not yet assigned to the unit, the Add To Unit dialog box appears. Click **Yes** to add the staff member to the unit. Otherwise, click **No**.

- To delete an assignment, select the cell and press the Delete key.
- The **Notes** cell provides a place to write a brief note about the patient, for example:
  - DNR
  - Clear Liquid Diet
  - No visitors
  - Maintain Reverse Isolation
  - NPO
  - Patient had a sitter
  - Bilateral soft wrist restraints
- To save changes to a cell, press Enter or click another cell. The staff assignment is saved to the Vocera Server.
- The status bar at the bottom of the **Assignments** tab indicates when changes are saved.

Printing Staff Assignments

To print the complete staff assignments table, use the **Print** link in the Staff Assignment application. DO NOT use the **Print** toolbar button in Internet Explorer, or the **File > Print** command, because those print options print the visible tab instead of the entire scrollable table.

To print staff assignments from Staff Assignment:

1. Click the **Print** link at the upper right part of the page.

   A separate browser window opens with the complete assignments table, and the **Print** command is invoked, which opens the **Print** dialog box.

2. Select print options, and then click **Print**.

Refreshing the Application with Data from the Vocera Server

By default, Staff Assignment refreshes the application with data from the Vocera Server every 10 minutes. You can change the refresh interval if you would like to refresh less or more frequently. When you refresh the data, the application fetches new users that have been added to groups, any assignments of staff to groups (including those made using voice commands) or assignments that have been removed because users have logged out.

To change the refresh interval:

1. On the **Assignments** tab, enter a value in the **Refresh (minutes)** field.

2. Click the **Refresh** button or click another tab to save the refresh interval.

To manually refresh data:

• Click the **Refresh** button at the upper right of the **Assignments**, **Bed/Role**, or **Staff** tabs.

Using Staff Assignment Premier Features

This section describes end user features available with Staff Assignment Premier.

User Status Indicators

On the **Assignments** tab, you can quickly identify the current status of staff members by looking at the color indicators to the left of their names. The status colors (green, yellow, and red) are the same used by Vocera smartphone clients.

Table 4. User status indicators

Status Indicator	Description
Green	The user is online and available for a call.
Yellow	The user is online but unavailable for a call. The user may be on a call or in Do Not Disturb mode.
Red	The user is offline, either because he or she is logged off or is currently off network.
	Note: In the User Sessions dialog box, users that have a dotted red status indicator are Staff Assignment application users but not Vocera device users (for example, the user may have logged into Staff Assignment using the Administrator account).

Calling or Broadcasting from Staff Assignment

While using Staff Assignment, you can initiate a call or broadcast to a bed group or to staff members on the **Assignments** tab. The call can be made from a Vocera badge (or any Vocera device) or a desk phone. By calling directly from Staff Assignment, you can connect quickly to other users without interacting with the Vocera Genie, which is useful in high noise environments. In addition, this feature allows a unit secretary, who may not have a Vocera device, to interact with mobile staff members.

To call or broadcast from Staff Assignment, you must be logged in as a Vocera user. You cannot call or broadcast from Staff Assignment if you logged in as "Administrator".

To use a desk phone instead of a Vocera device for console calls:

1. On the **Assignments** tab, check the **Use phone for console calls** box.

2. In the **Ext.** field, type a desk extension. You do not need to type the full 10-digit number.

   By default, the **Ext.** field is populated with the **Desk Phone or Extension** field value from your Vocera user profile. However, you can change it to another desk extension or even an outside number.

To call or broadcast to a bed or role from the Assignments tab:

1. Right-click a bed or role in the Bed Or Role column on the **Assignments** tab, and choose one of the following calling commands:

   • **Call** – initiates a call to the selected bed or role.

   • **Urgent Call** – initiates an urgent call to the selected bed or role.

   • **Broadcast** – initiates a broadcast to staff members assigned to the selected bed or role.

   • **Urgent Broadcast** – initiates an urgent broadcast to staff members assigned to the selected bed or role.

   Urgent calls and urgent broadcasts break through to recipients even if they are in Do Not Disturb mode, are blocking calls, are forwarding all their calls, or are in the middle of another call or broadcast. These commands require urgent calling and broadcasting permissions.

2. If you place the call from a desk phone, pick up the receiver when the phone rings, listen for your name, and then press the star key (*) to start the call or broadcast.

Note: When you use a desk extension to make a call from Staff Assignment, the Vocera Genie announces the logged in user's name as a security precaution. This deters Staff Assignment users from making calls from unauthorized phone extensions.

To call a staff member from the Assignments tab:

1. Select a cell where a staff assignment has already been made for a bed or role.

2. Right-click the cell, and choose one of the following calling commands:

   • **Call** – initiates a call to the selected user.

- **Urgent Call** – initiates an urgent call to the selected user.

    An urgent call breaks through to recipients even if they are in Do Not Disturb mode, are blocking calls, are forwarding all their calls, or are in the middle of another call. This command requires urgent calling permission.

3. If you place the call from a desk phone, pick up the receiver when the phone rings, and then press the star key (*) to start the call.

    Note: When you use a desk extension to make a call from Staff Assignment, the Vocera Genie announces the logged in user's name as a security precaution. This deters Staff Assignment users from making calls from unauthorized phone extensions.

Sending a Text Message

You can use Staff Assignment to send short text messages (up to 200 characters) to users who have been assigned to beds or roles on the **Assignments** tab.

To send a text message from Staff Assignment, you must be logged in as a Vocera user. You cannot send a text message from Staff Assignment if you logged in as "Administrator".

To send a text message to a user from the Assignments tab:

1. Select a cell where a staff assignment has already been made for a bed or role.

2. Right-click the cell, and choose **Send Text Message**. The Text Message dialog box appears.

3. Type a text message. It can be up to 200 characters.

    Note: If any predefined text messages have been defined for your unit by the administrator, you can select one, edit it, and then send it. For example, if there is a predefined message "Water requested by Room," you can select it from the list, type the room number at the end of the message, and then click **Send**.

4. Click **Send**.

Locking the Screen

Once you have finished making staff assignments for all units, you may want to lock the screen temporarily to prevent inadvertent changes. You can unlock the screen later to reassign staff or enter notes. Your session will continue to refresh and show other people's updates, and the **Refresh** button is still active.

When you lock the screen, only your session is affected. While your screen is locked, other Staff Assignment users can still log in and change staff assignments.

To lock the Assignments tab to prevent changes:

• On the **Assignments** tab, make sure the **Lock** box is checked.
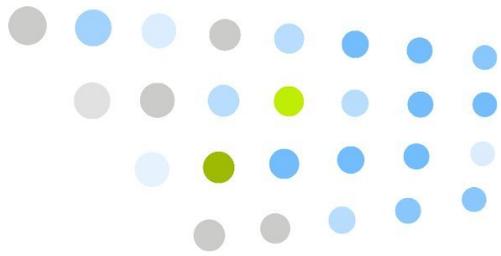
⋮ Setting Up and Administering the Application

The **Setup** tab allows you to set up the Staff Assignment application and manage Staff Assignment user sessions. Only a Vocera user with System Administrator permission can see the **Bed/Role** and **Setup** tabs. Other users can only see the **Assignments** and **Staff** tabs.

The system administrator should set up the units for the application and specify the type of authentication used. By default, only Vocera users with System Administration permission can log into Staff Assignment. If people without Vocera user accounts need to use the application, the system administrator must create an application password. Otherwise, you can specify the Administrator account and password to allow people with Vocera user accounts to log into Staff Assignment using their Vocera user ID and password.

Staff Assignment Setup Checklist

To set up the Staff Assignment application, a Vocera system administrator must complete the following tasks:

☐	1. Set up system preferences, default settings for users, and groups managed by Staff Assignment in the Vocera Administration Console. See **Best Practices for Staff Assignment** on page 39.
☐	2. Log into Staff Assignment, and set up the hospital units that will use Staff Assignment. See **Adding or Editing a Unit** on page 24.
☐	3. Assign beds or roles to hospital units. See **Assigning Beds or Roles to Units** on page 26.
☐	4. Optionally, assign staff members and groups to each hospital unit. This task could also be performed by Staff Assignment end users. See **Assigning Staff Members or Groups to Units** on page 14.

☐	5. Set up Staff Assignment authentication to permit end users to log into the application. See **Setting Up Staff Assignment Authentication** on page 27.
☐	6. Optionally, modify the Staff Assignment configuration file to change application properties. See **Modifying the Staff Assignment Configuration File** on page 29.
☐	7. Optionally, configure email settings in the Vocera Administration Console to enable email alerts. See **Sending Email Alerts** on page 34.
☐	8. Make sure Staff Assignment end users configure the security level for Internet Explorer to Medium-low or lower. See **Browser Security Requirements** on page 8.
☐	9. If you have a Vocera Server cluster, create a Staff Assignment Login page for end users. The page should provide links to the Staff Assignment URL for each Vocera Server in the cluster. If one of the Vocera Servers is down, users can click a link to log into the other server.
☐	10. If you have Staff Assignment Premier, you may optionally assign Staff Assignment Premier licenses to specific users or groups. See **Assigning Staff Assignment Premier Licenses to Users and Groups** on page 35.
☐	11. If you have Staff Assignment Premier, you may need to close user sessions to free up licenses for other users. See **Managing Staff Assignment User Sessions** on page 35.
☐	12. If you have Staff Assignment Premier, you may optionally create predefined text messages that can be used for each unit. See **Creating Predefined Text Messages** on page 37.

Adding or Editing a Unit

A unit is a hospital unit, such as Dialysis, Cardiac Intensive Care, or Surgical Oncology, which has beds with nurses assigned to them. These units must be defined in the Staff Assignment application, although they may also exist as department groups in the Vocera system.

After you create a unit, you can change its description. You cannot change its name.

To add a new unit:

1. On the **Setup** tab, select a site from the **Site** list.

2. Click **Add New Unit**. The Add Unit dialog box appears.

3. Enter the name of the unit and a description; both fields can be up to 30 characters long. The name must be unique.

4. Save the unit by clicking either the **Save** button or the **Save and Continue** button:

   • **Save** – saves the unit and closes the Add Unit dialog box.

   • **Save and Continue** – saves the unit, and clears the Add Unit dialog box so that you can add another unit.

To edit a unit's description:

1. On the **Setup** tab, select a site from the **Site** list.

2. Select a unit.

3. Click **Edit Unit**. The Edit Unit dialog box appears.

4. Edit the unit description.

5. Click **Save**.

Deleting a Unit

If you created a unit with the wrong name, you cannot modify the name. However, you can delete the unit and create another one with the correct name.

Important: When you delete a unit, you also delete the unit's bed and staff data. However, staff assignments for the beds are not deleted and continue to be maintained on the Vocera Server.

To delete a unit:

1. On the **Setup** tab, select a site from the **Site** list.

2. Select a unit.

3. Click **Delete Unit**.

4. You are prompted whether to delete the selected unit. Click **Yes**.

Assigning Beds or Roles to Units

The **Bed/Role** tab allows the system administrator to select the beds and roles that are available in each unit. A bed is any Vocera group associated with a patient. A role is a Vocera dynamic group that contains staff members who perform a specific role or task. For example, Charge Nurse could be a role. Only a Vocera user with System Administration permission can see the **Bed/Role** tab.

Hospital beds and roles must be created in the Vocera system as groups. The staff members that are assigned to the beds or roles during a shift are members of the group.

You cannot use the Staff Assignment application to create beds or roles. The system administrator creates groups for beds and roles in the Vocera Administration Console.

Note: Up to 200 beds or roles can be assigned to each unit.

To assign beds or roles to a unit:

1. On the **Bed/Role** tab, select a site from the **Site** list.

2. Select a unit from the **Unit** list.

3. To add beds or roles to the unit:

   a. Select one or more beds or roles in the **Groups in Site** list.

      To select contiguous beds in the list, press Shift+click.

      To select noncontiguous beds in the list, press Ctrl+click.

      To find a bed group in the site, start typing the name of a bed group in the find text box. A drop-down list appears with names of matching bed groups. Select one from the list.

      If it is a long list, use navigation controls below the list to see the next or previous 200 members.

   b. Click the `››` button to move beds selected in the **Groups In Site** list to the **Assigned To Unit** list.

4. To remove beds or roles from the unit:

   a. Select one or more beds or roles in the **Assigned To Unit** list.

   b. Click the `‹‹` button to move beds selected in the **Assigned To Unit** list to the **Groups In Site** list.

Handling Departments and Subdepartments

On the Bed/Role tab, Staff Assignment displays an asterisk (*) next to department names and two asterisks (**) next to subdepartment names to help you identify those types of groups. Generally, when you assign beds or roles to a unit, you should NOT assign department groups or subdepartment groups since they do not represent beds or roles and they do not have dynamic membership.

If you inadvertently select one or more department groups or subdepartment groups in the **Groups in Site** list, and then click **>>** to assign them to the unit, the Assign Bed/Role dialog box appears.

From the Assign Bed/Role dialog box, you can click the **Depts\Subdepts** tab to see which of the groups you selected are departments or subdepartments.

Click **Yes** to assign all groups, including subdepartments. When a subdepartment is assigned, its group type is changed from Subdepartment to Ordinary. If any department groups were selected, they are automatically excluded from the unit.

If you don't want to assign the groups, click **No**, and then choose other groups to assign from the **Groups in Site** list.

Setting Up Staff Assignment Authentication

Users can log into Staff Assignment using one of the following authentication options:

- Vocera username and password
- Any name and the Staff Assignment application password
- Active Directory credentials.

For users without Vocera or Active Directory credentials, create an application password.

If you specify an application password, all users except for Vocera users with System Administration permission must specify the application password when they log in. Otherwise, all users must specify their Vocera password when they log in.

The application password can be changed at any time. If you change the application password, make sure to notify the Staff Assignment users of the new password.

The application password certificate file is saved to and read from the **\vocera\data\applications\StaffAssignment** directory on the Vocera Server.

Note: Do not manage authentication type using the security options when Active Directory authentication is configured. For details about configuring Active Directory, see the Vocera Administration Guide.

To set up Staff Assignment authentication:

1. On the **Setup** tab, click **Security**. The Security dialog box appears.

2. Select the type of authentication used for Staff Assignment:

Vocera User Login	Allows people with Vocera user accounts to be able to log into Staff Assignment. This is the default authentication type. This type of authentication is required for Staff Assignment Premier functionality.
Application Login	Allows people without System Administration permission to log into Staff Assignment using the application password.
	Users with System Administration permission can log into Vocera Staff Assignment using their Vocera user ID and password instead of the application password.

3. In the **Admin Name** field, enter the name of the Vocera administrator account. The default administrator account is called Administrator. This field is required and cannot exceed 50 characters.

4. In the **Admin Password**, enter the administrator password. The default administrator password is "admin". This field is required and cannot exceed 30 characters.

5. Enter the **Application Password** and **Re-type Application Password** fields. If **Application Login** is selected, this field is required. It cannot exceed 30 characters.

6. Click **Save**.

   A message prompts that a password certificate has been created. Click **OK**.

7. If you specified an application password, notify all Staff Assignment users of the new application password.

Resetting the Administrator or Application Passwords

When you set up Staff Assignment authentication, the Vocera administrator username and password are encrypted and saved to a certificate that is used for Staff Assignment authentication. If the Vocera administrator subsequently changes the administrator username or password, Staff Assignment users without administrator privileges will be unable to log in until a new Staff Assignment certificate is saved. Users without administrator privileges who try to log into Staff Assignment will see the following error:

Certificate not found: Invalid certificate

To reset Staff Assignment authentication, click the **Setup** tab, click **Security**, specify the Vocera administrator username and password, and then click **Save** to save the new certificate.

If you allow non-Vocera users to log into Staff Assignment, you can also change the Staff Assignment application password in the Security dialog box. Whenever you change the application password, make sure to notify the Staff Assignment users of the new password.

Modifying the Staff Assignment Configuration File

After the Vocera Server is installed and the Tomcat service is started, the Staff Assignment application automatically generates a configuration file on the server. You can edit the configuration file to configure the application. The file is named **app.config** and it is located in the following folder:

\vocera\data\applications\staffassignment

The **app.config** file is NOT synchronized continuously with Vocera cluster nodes, unlike Vocera Server database transactions. However, the file is saved along with the Vocera Server data during a scheduled or manual backup, and it is automatically copied from the active Vocera node to standby nodes during a remote restore.

Configuration of Staff Assignment is optional. The default configuration may work fine for you. You can edit the file in any text editor, such as Notepad.

Note: Property names in the **app.config** file are case-sensitive.

The following table describes the Staff Assignment application properties in alphabetical order (they may appear in a different order in the **app.config** file):

Table 5. Staff Assignment application properties

Property	Description
appDescription	Descriptive text for the Staff Assignment application, which appears at the top of the Staff Assignment page. The default is Staff Assignment Premier or Staff Assignment, depending on your license.
checkBedRoleType	Sets whether to check whether Bed/Role groups that are assigned to a unit are "Subdepartments," and if so to change them automatically to "Ordinary" groups. Enter 1 (Yes) or 0 (No). The default is 1. For more details on how Staff Assignment handles departments and subdepartments, see **Handling Departments and Subdepartments** on page 27.
checkDB(hrs)	Hours between Staff Assignment database validation. Staff Assignment database Staff and Group names are compared with the Vocera Server database. Invalid Staff Assignment database entries are removed. The default is 4, meaning the Staff Assignment database is validated every 4 hours. **Note:** If you modify this property, you must restart the Tomcat service to load the new value.
columnCount	The number of staff columns for each bed or role. Enter an integer from 2 to 8. The default is 4.
columnNames	A comma-separate list of up to 8 column names for the Assignments tab. The default list is "1st Member, 2nd Member, 3rd Member, 4th Member, 5th Member, 6th Member, 7th Member, 8th Member". **Note:** For optimal display, try to limit column names to 15 characters or less.
logMsgs	Sets whether to log Staff Assignment activity (including logins, errors, assignments) to the **\vocera \logs\staffassignment** folder on the Vocera Server. Enter 0 (no logging) or 1 (logging enabled). The default is 1.

Property	Description
maxLogFiles	Maximum number of log files. The default is 100, and the maximum is 5000. **Note:** If you modify this property, you must restart the Tomcat service to load the new value.
maxLogLines	Maximum lines of activity per log file. The default is 50000. **Note:** If you modify this property, you must restart the Tomcat service to load the new value.
maxNotesSize	Maximum number of characters per notes entry. The default is 500.
maxUnitGroups	Maximum Bed/Roles that can be assigned to a Unit. The default is 200.
maxUnitUsers	Maximum Staff Users and Staff Groups that can be assigned to a Unit. The default is 200.
serverIP	Comma-separated list of Vocera Server cluster IP addresses, in dotted-decimal notation. On each standby Vocera Server, this property must be updated manually. On the active Vocera Server, this property is automatically updated when a user logs into Staff Assignment. If you have a standalone Vocera Server, enter its IP address.

Property	Description
serverIPalias	Comma-separated list of Vocera Server cluster IP address mappings, in dotted-decimal notation. You should only use this property if you have a Vocera Server cluster and your Vocera Server computers have dual NIC cards, one for a "private" IP address and one for a "public" IP address.
	For each IP address mapping, separate the private IP address from the public address with a ">" character. For example, if 10.98.2.101 and 10.98.2.102 are the private IP addresses and 101.0.0.1 and 101.0.0.2 are the public IP addresses, you would enter the following value for the **serverIPalias** property:
	`serverIPalias = 10.98.2.101>101.0.0.1, 10.98.2.102>101.0.0.2`
	If you need to enter values in the **serverIPalias** property, make sure you enter the *private* IP addresses for Vocera Server cluster nodes in the **serverIP** property.
sitePermissions	Sets whether users who log into Staff Assignment can view and edit units at all sites or only units at their site. Enter "allSites" (the default) or "userSite". Users with system administration permission can always view and edit units from all sites.

Note: You may also see **staffPrimary** and **staffSecondary** properties in the **app.config** file, but those properties are obsolete and have been replaced by the **columnNames** and **columnCount** properties.

To edit the Staff Assignment configuration file:

1. On the Staff Assignment computer, open the following file in a text editor:

   \vocera\data\applications\staffassignment\app.config

2. Edit any of the properties.

3. Save your changes.

4. If you changed any of the following properties, stop and start the Tomcat service:

   - **checkDB(hrs)**
   - **maxLogLines**
   - **maxLogFiles**

Changes to other Staff Assignment application properties do not require you to restart Tomcat. They take effect the next time someone logs into the Staff Assignment application.

5. If you have a Vocera cluster, copy the **app.config** file to every Vocera Server node.

To reset the Staff Assignment configuration file to default settings:

1. On the Staff Assignment computer, open the following folder:

   \vocera\data\applications\staffassignment

2. Rename the **app.config** file to **app.config.old**.

3. Open an Internet Explorer browser window, and log into Staff Assignment. A new **app.config** file is generated on the server with default settings.

4. If necessary, open the new **app.config** file in a text editor, make changes to the file, and then save your changes.

5. If you have a Vocera cluster, copy the new **app.config** file to every Vocera Server node.

Enabling or Disabling Staff Assignment Logging

You can enable or disable logging of Staff Assignment activity by setting the **logMsgs** property in the **app.config** file on the server. The application logs any logins, errors, and assignments. Logging is enabled by default.

When logging is enabled, log files are saved to the following folder on the Vocera Server:

\vocera\logs\staffassignment

To enable or disable Staff Assignment logging:

1. On the Staff Assignment computer, open the following file in a text editor:

   \vocera\data\applications\staffassignment\app.config

2. Change the value of the **logMsgs** property.

   • To enable logging, set logMsgs to 1.

   • To disable logging, set logMsgs to 0.

3. Save your changes.

   Note: You do not need to restart Tomcat.

4. If you have a Vocera cluster, copy the **app.config** file to every Vocera Server node.

Backing Up and Restoring Staff Assignment Data

The Staff Assignment application data and certificate file are stored in the **\vocera\data\applications\StaffAssignment** directory on each Vocera Server node in a cluster, and the data is synchronized between the cluster nodes. When the Vocera Server creates a scheduled backup file or the Vocera Server administrator creates a backup file manually using the Administration Console, the Staff Assignment application data and certificate file are also saved to the backup file.

The Staff Assignment configuration file (**app.config**) is also saved to the backup file when you back up Vocera Server data. The configuration file is NOT synchronized between cluster nodes, but it is automatically copied to cluster nodes during a remote restore.

If you restore Vocera Server data from a backup file, the Staff Assignment application data, certificate file, and configuration file contained within the backup file are also restored.

For more information about restoring data from a backup file, see the *Vocera Administration Guide*.

Sending Email Alerts

Staff Assignment uses the Vocera Server email alert feature to automatically send an alert message to the Vocera system administrator whenever the application changes a department or subdepartment group to an ordinary group. This can happen in two ways:

• Someone changed a bed/role group to a department group or subdepartment group, either using the Administration Console or by upgrading the Vocera Server. When Staff Assignment performs a refresh of data from the Vocera Server, the bed/role group is automatically reverted to an ordinary group.

• A Staff Assignment user with System Administrator privileges has added a subdepartment group to a unit and thereby converted it to an ordinary group.

These alerts are for information purposes only. Corrective action may not be necessary.

Note: Staff Assignment alerts are enabled only if the Vocera system administrator has configured email settings in the Administration Console. For more information, see the *Vocera Administration Guide*.

Assigning Staff Assignment Premier Licenses to Users and Groups

If your organization has purchased a select number of Staff Assignment Premier licenses, the Vocera system administrator can assign those licenses to specific users and groups. This ensures that users who have been assigned a Staff Assignment Premier license will always have access to extended functionality when they log in. Users who have not been assigned a Staff Assignment Premier license will automatically log in with the Staff Assignment Standard license.

You can assign Staff Assignment Premier licenses to a group that has more members than there are available licenses. When all Staff Assignment Premier licenses are in use, users who subsequently log in will automatically get the Staff Assignment Standard license.

To assign a Staff Assignment Premier license to a user or group:

1. On the **Setup** tab, click **Licenses**. The Premier Licenses dialog box appears.
2. In the **Find User/Group** field, start typing the last name of a user or the name of a group. A list of matching users or groups appears.
3. Click a user or group. The Add To Premier Licenses dialog box appears.
4. Click **Yes** to add the user or group to the list.
5. Click **Close** to close the Premier Licenses dialog box.

To remove a Staff Assignment Premier license from a user or group:

1. On the **Setup** tab, click **Licenses**. The Premier Licenses dialog box appears.
2. Select a user or group in the list, and then click **Delete**.

   Note: Removing the Staff Assignment Premier license from users and groups does not affect sessions in progress. However, you can close sessions to force users to log in again.

3. Click **Close** to close the Premier Licenses dialog box.

Managing Staff Assignment User Sessions

Staff Assignment is a Web application, allowing multiple users to log in and make staff assignments for your Vocera system. Administrators can log into Staff Assignment to manage the sessions of users who have logged in. For example, if any users have incorrectly left their session open after their shift has ended, the administrator can close the sessions to allow other users to log in and use the application license.

When all of your organization's Staff Assignment Premier client licenses are currently being used, users can still log into Staff Assignment but they won't have access to Staff Assignment Premier features (see **Using Staff Assignment Premier Features** on page 19). However, users with System Administration permission who log into Staff Assignment with their Vocera username and password rather than logging in as "Administrator" always have access to Staff Assignment Premier features—including session management.

Note: This feature is available only in Staff Assignment Premier.

To manage Staff Assignment user sessions:

1. On the **Setup** tab, click **User Sessions**. The User Sessions dialog box appears.

   The User Sessions dialog box has the following columns:

   • **Name** – the name of the user.
   • **Badge Status** – whether the user is logged in, logged out, in Do Not Disturb mode, or is not a Vocera badge user.
   • **IP Address** – the IP address of the computer running the user session.
   • **Since** – the date and time on which the session started.
   • **Duration** – the duration (in days, hours, and minutes) of the session.
   • **License** – whether the session is licensed to use Staff Assignment Premier or not.

2. To select a user session, check the box to the left of the session.

3. After one or more user sessions is selected, click one of the following buttons:

   • **Console Message** – sends a console text message to users running other Staff Assignment sessions. Console messages can be used to alert console users before closing their sessions. Recipients of console messages will see the message the next time the application refreshes with data from the server. A console message is limited to 100 characters.

     Note: There is no auditing trail for console messages currently, and therefore no ability to report on when they were sent or received.

   • **Details** – displays details of a selected session.
   • **Close Session** – closes selected sessions. Users will be notified that their session has been closed after any action that refreshes the application screen.

- **Refresh** – refreshes the User Sessions dialog box with latest session information from the server.

4. When you are finished managing sessions, click **Close**.

Creating Predefined Text Messages

When you set up units in Staff Assignment, you may optionally create predefined text messages that can be used for each unit. Staff Assignment users can choose to send any text message they want within the 200-character limit, but predefined messages may be convenient for messages that are used commonly in a unit.

Note: This feature is available only in Staff Assignment Premier.

To create predefined text messages for a unit:

1. On the **Setup** tab, click **Set Text Messages**. The Edit Predefined Text Messages dialog box appears.

2. In the **Site** list, select a site.

3. In the **Unit** list, select a unit.

4. To add a new message, type a message in the text box, and then click **Add**. The message can be up to 200 characters.

5. To update an existing message, select a message in the list, edit the message in the text box, and then click **Update Msg**.

6. To delete an existing message, select a message in the list, and then click **Delete**.

7. When you are finished, click **Save All** to save the messages and close the Edit Predefined Text Messages dialog box.

8. A confirmation dialog box appears. Click **OK**.

Emptying the Application Database

When you use the Staff Assignment application, it saves its data on the Vocera Server in its own data file. When you first set up the application, you may want to create several temporary units and add some nurses to them. When you are ready to set up actual units, you can clear the application database.

The application database file is stored in the **\vocera\data\applications \StaffAssignment** directory on the Vocera Server.

Note: Clearing the application database does not affect groups and their members in the Vocera database.

To clear the application database:

1. On the **Setup** tab, click **Clear DB**.

2. When you are prompted whether to clear the application database, click **Yes**.
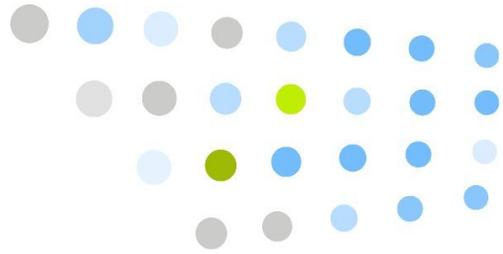
Best Practices for Staff Assignment

This chapter provides best practices you should follow when you set up your Vocera system for Staff Assignment.

System Preferences and Defaults

When you configure your Vocera system for Staff Assignment, follow these best practices:

- Make sure the **Announce Name of Called Group** default setting is checked in the Administration Console (**Defaults > Genie Settings**).

- Make sure the **Auto Logout When Badge in Charger** default setting is checked in the Administration Console (**Defaults > Notification**). Override user settings to ensure the feature is enabled for everyone.

- Make sure the **Enable Auto-Logout Period** preference is checked in the Administration Console (**System > Preferences**), and specify the time interval at which automatic logout should occur when a device is off network (the default is 1 hour).

Bed/Room Groups and Role-Based Groups

When you set up groups that are managed by Staff Assignment, follow these best practices:

- Staff Assignment is designed to manage assignments to bed/room groups and role-based groups, not to department or subdepartment groups. Therefore, the Group Type property for all groups managed by Staff Assignment should be **Ordinary**, not **Department** or **Subdepartment**.

- Groups managed by Staff Assignment can safely be nested within department groups or subdepartment groups, as shown in the following figure. Changes to the membership of ordinary groups do not affect server performance.

Figure 1. Different types of groups
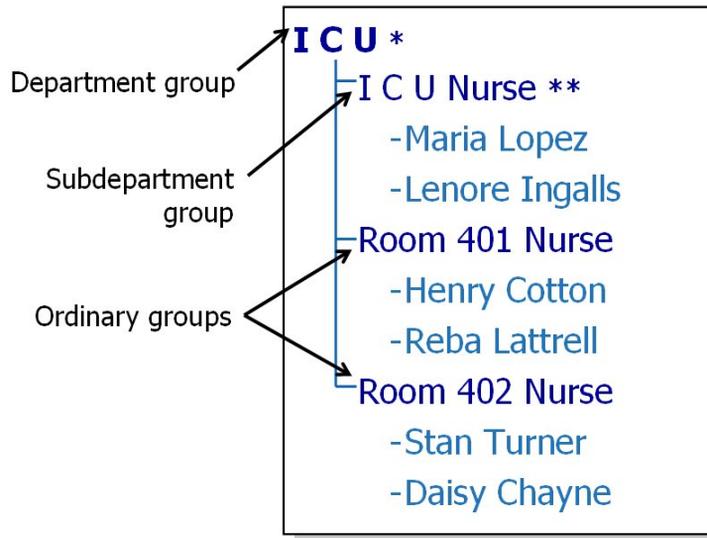
- If users are used to calling a room by saying, "Call Room *number*," make sure the group name for the room starts with the word "Room" (for example, "Room 2013").

- Make sure groups managed by Staff Assignment have temporary membership (check the **Remove Users on Logout** box on the Member tab of the group).

- Make sure groups managed by Staff Assignment use sequential scheduling (select the **Sequential** scheduling option on the Info tab of the group). This ensures that calls are routed first to the first member and then to the second member.

- If there are multiple beds per room, follow the room number by a letter (for example, "Room 2013 A"). Leave a space between the room number and the letter.

- Assign a virtual extension or a DID number to each bed/room group in the **Vocera Extension** field on the Info tab of the group.

  - Outside callers who dial the Vocera hunt number can connect to the group by entering the group's **Vocera Extension** at the Genie prompt.

  - The **Vocera Extension** can be used as the device ID for Alerts and Alarms in your middleware system.

- Use the following convention for extensions: Extension = Room Number + Bed Number + Role Number

- **Bed Number:** 0=private room, 1=Bed A, 2=Bed B
- **Role Number:** 1=RN, 2=RN Secondary, 3=CNA, 4=Tech

- You can use the Update page of the Vocera Administration Console to update groups managed by Staff Assignment, ensuring that they conform to best practices. You typically export existing groups to a CSV file, edit the CSV file, and then use the update feature to copy data from the CSV file back to the Vocera database.

  For more information about updating groups, see the *Vocera Administration Guide*.
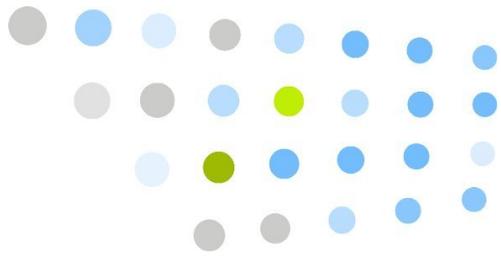
Frequently Asked Questions

This section provides answers to frequently asked questions about using and setting up Staff Assignment.

Questions about Using Staff Assignment

These questions deal with how to use Staff Assignment.

Q: **Can I use a browser other than Internet Explorer?**

A: Vocera has certified Staff Assignment running only on Internet Explorer 6, 7, or 8. Other browsers have not been tested.

Q: **Can I login to Staff Assignment using my Active Directory credentials?**

A: Yes. As of release 4.4, you can use Active Directory credentials to login into Staff Assignment. This option must be enabled by the Vocera System Administrator. For more information, see **Active Directory Login**[1].

Q: **How many staff members can I assign to each bed?**

A: You can assign up to 8 staff members to each bed or role, although by default only 2 staff member columns are available.

Q: **Can someone be assigned to multiple beds?**

A: Yes. This is a common scenario. However, a staff member cannot be assigned multiple times to the same bed.

Q: **Can I assign someone from another site to a bed?**

A: Yes. On the **Assignments** tab, use the **Find Staff** field to find a staff member at another site. The Add To Unit dialog box appears, allowing you to add the staff member to the unit and to the selected bed.

Q: **How can I tell if staff members are logged in and available for a call?**

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[1] staffassignment_aboutAD.xml#staffassignment_aboutAD

A: If you have Staff Assignment Premier, colored status indicators (green for online, yellow for online but unavailable, and red for offline) appear to the left of each cell on the **Assignments** tab.

Q: **When is a staff assignment saved to the Vocera Server?**

A: After you select a staff member for a field, press Enter or click another cell to save the assignment. The status bar at the bottom of the **Assignments** tab indicates when staff are added or removed.

Q: **What should I enter in the Notes field on the Assignments tab?**

A: Add any helpful information about the assignment. Here are some examples:

- DNR
- Clear Liquid Diet
- No visitors
- Maintain Reverse Isolation
- Marie in charge from 7 – 12 Noon and Christine in charge from 12 Noon – 4 PM

Note: To preserve patient privacy, avoid using patient names in the **Notes** field.

Q: **Can users still add themselves to groups using voice commands on the badge?**

A: Yes. Users can still add themselves to groups using voice commands, and these assignments can be further managed using Staff Assignment. However, if your site is implementing Staff Assignment, as a best practice Vocera recommends using Staff Assignment to perform all staff assignments. You may need to retrain Vocera users to not use voice commands to add themselves to groups.

Q: **Does Staff Assignment have record locking?**

A: Yes. If someone else has posted a change to a bed group assignment after you began editing a field, you won't be allowed to post an update to the field because it is currently "dirty." Staff Assignment will display an error message telling you that the bed group has been updated. The application will then fetch the latest data from the server.

Q: **I finished assigning staff members to beds and roles for all units. Can I lock the screen to prevent changes?**

A: If you have Staff Assignment Premier, you can lock the screen by checking the **Lock** checkbox on the **Assignments** tab. When you lock the screen, only your session is affected. While your screen is locked, other Staff Assignment users can still log in and change staff assignments.

Questions about Setting Up Staff Assignment

These questions deal with setting up Staff Assignment.

Q: **How can I change the number of staff member columns for each bed or role?**

A: By default, Staff Assignment displays 4 staff member columns, but the application supports up to 8. To change the number of staff member columns, edit the value of the **columnCount** property in the **app.config** file. To change the column names, edit the value of the **columnNames** property. See **Modifying the Staff Assignment Configuration File** on page 29.

Q: **Does Staff Assignment support using encrypted access using SSL?**

A: Yes. Like the Administration Console and the User Console, Staff Assignment supports using encrypted access to the server. You can optionally enable SSL access in Vocera web clients during installation of the Vocera Server. At any time after installation of the Vocera Server, you can enable or disable SSL access as described in the *Vocera Administration Guide*.

Q: **Can users who have a Vocera ID but do not have a Vocera password log into Staff Assignment?**

A: Yes, if you create an application password that users can use to log in. See **Setting Up Staff Assignment Authentication** on page 27. Otherwise, your Vocera users must have a password to log into Staff Assignment. You cannot log into Staff Assignment using a blank password.

To use Staff Assignment Premier features, users must log into Staff Assignment with their Vocera user ID and password.

Q: **How can I allow people without Vocera user accounts to use Staff Assignment?**

A: In the **Setup** tab, click **Security** to create an application password. See **Setting Up Staff Assignment Authentication** on page 27.

Q: **I changed the Vocera administrator password and now Staff Assignment users cannot log in. Why?**

A: The Staff Assignment application requires a Vocera administrator login to connect to the Vocera server. When you set up Staff Assignment authentication, the Vocera administrator username and password are encrypted and saved to a certificate that is used for Staff Assignment authentication. If the Vocera administrator changes the administrator username or password, Staff Assignment users without administrator privileges will be unable to log in until a new Staff Assignment certificate is saved. See **Resetting the Administrator or Application Passwords** on page 29.

Q: **How can I remove staff assignments from beds automatically when a shift change occurs?**

A: In the Vocera Administration Console, configure the group to automatically remove users from membership in the group when they log out. Edit the group to open the Edit Group dialog box, and then click the **Member** tab. Make sure the **Remove Users On Logout** box is checked. When users log out at the end of their shifts, they will be logged out from all bed groups with temporary membership (that is, groups that have the **Remove Users On Logout** box checked).

Q: **You can assign staff members to beds and roles. What is a role?**

A: A role is a Vocera dynamic group that contains staff members who perform a specific role or task during a hospital shift. For example, Charge Nurse could be defined as a role-based group in Vocera. If your Vocera system has role-based groups, users can use Staff Assignment to assign staff members to roles as well as beds.

Q: **When you define bed/room groups or role-based groups, can you put them inside department groups?**

A: Yes. Bed/room groups and role-based groups do not affect the department grammars, so you can safely put them within departments.

Q: **When you clear the Staff Assignment database, what information is lost?**

A: All staff assignments are stored on the Vocera Server; clearing the Staff Assignment database does not affect those assignments. However, units are not stored in the Vocera database, so they are lost if you clear the Staff Assignment database.

You should not need to clear the Staff Assignment database unless you have created temporary units to test the application and when testing is finished you want to start over fresh. It takes only a few minutes to create new units, assign available staff to the units, and assign beds to the units.

When you clear the Staff Assignment database, the following information is lost and must be recreated.

- Units
- Staff members assigned to units (staff-unit associations)
- Beds assigned to units (bed-unit associations)
- Notes for assignments

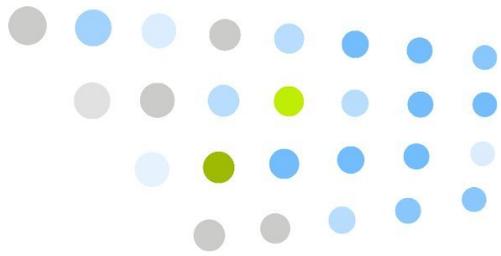**Q:** **How do you back up and restore Staff Assignment application data?**

A: The Staff Assignment application data, certificate file, and configuration properties are saved along with the Vocera Server data during a scheduled or manual backup. To restore the Staff Assignment application data, certificate file, and configuration properties, use the Vocera Administration Console to restore data from a backup file.

Q: **Under what situations does Staff Assignment send an email alert to the Vocera system administrator?**

A: Staff Assignment uses the Vocera Server email alert feature to automatically send alert messages to the Vocera system administrator whenever the application changes a department or subdepartment group to an ordinary group. For details, see **Sending Email Alerts** on page 34.

Q: **Where can I see the number of Staff Assignment Premier licenses currently in use?**

A: On the **Setup** tab, click **User Sessions**. See **Managing Staff Assignment User Sessions** on page 35.
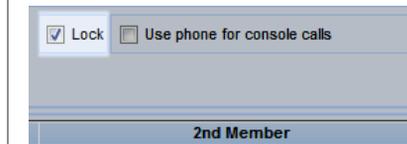
:: Staff Assignment Quick Reference

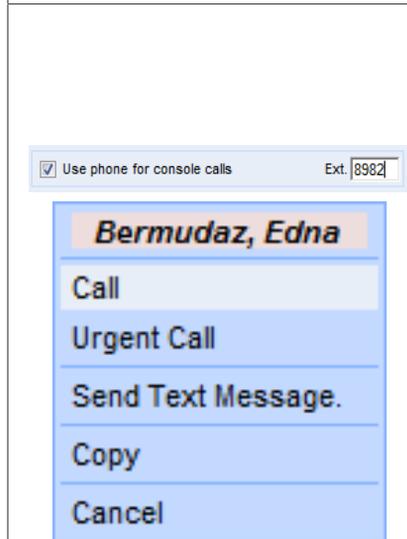|	

Vocera Staff Assignment
 	
Help
 	
User Name
`usemam`
 	
Password
`••••••••`
 	
Login
	Log In
	1. Open Internet Explorer and type in the following URL:
	
	   http://*vocera_ip_address*/staffassignment
	
	   where ***vocera_ip_address*** is the numeric IP address of the Vocera Server.
	2. Enter your Staff Assignment user name and password, and then click **Login**.

Site Global ▼ - Select Site - Family Medical Clinic General Hospital Global Memorial Hospital Regional Medical Center Valley Hospital	*Assign a Staff Member to a Bed or Role* 1. On the **Assignments** tab, select a site from the **Site** list. 2. Select a unit from the **Unit** list. 3. Optionally, enter notes about the assignment in the **Notes** field. 4. Select one of the staff member cells for a bed or role. Start typing the last name of a staff member. A drop-down list appears with up to 10 matching names. Select a staff member from the list.
Refresh (minutes) 10 Refresh **Find Staff** J| Notes Jacinto, Anabeth : Global Jackman, Nicky : Global Jackson, Corwin : Global Jacome, Cecelia : Global Jagodzinski, Clayton : Global Jaico, Adonis : Global	*Find a Staff Member* 1. On the **Assignments** tab, click the **Find Staff** box. 2. Start typing the last name of a staff member. A drop-down list appears with up to 10 matching names. 3. Select a staff member from the list. **Note:** If the **Lock** checkbox is checked, the **Find Staff** box is not visible.

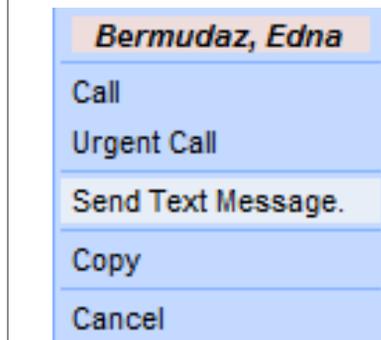|	
1st Member Short, Michael Chang, Steve	*Remove an Assignment* 1. Select the cell and press the **Delete** key. 2. Press **Enter**.
☑ Lock ☐ Use phone for console calls **2nd Member**	*Lock the Screen* On the **Assignments** tab, check the **Lock** box. **Note:** This feature is available only in Staff Assignment Premier.
☑ Use phone for console calls Ext. 8982 **Bermudaz, Edna** Call Urgent Call Send Text Message. Copy Cancel	*Call or Broadcast* 1. If you prefer to call from a desk phone, select the **Assignments** tab, check the **Use phone for console calls** box, and then type an extension in the **Ext** field. 2. On the **Assignments** tab, right-click either a bed or role or a cell where a staff assignment has been made. 3. Select one of the following commands from the pop-up menu: | **Bed or Role Commands**	**Staff Member Commands**
Call Urgent Call* Broadcast Urgent Broadcast*	Call Urgent Call* | * Urgent calls and broadcasts require special permission. 4. If you are using a desk phone, pick up the receiver when the phone rings, press the star key (*), and begin speaking. **Note:** This feature is available only in Staff Assignment Premier.
Bermudaz, Edna Call Urgent Call Send Text Message. Copy Cancel	*Send a Text Message* 1. On the **Assignments** tab, right-click either a bed or role or a cell where a staff assignment has been made. 2. Select the **Send Text Message** command from the pop-up menu. 3. The Text Message dialog appears. Type the message (up to 200 characters), and click **Send**. **Note:** This feature is available only in Staff Assignment Premier.

	Print a Page 1. Click the **Print** link at the upper right part of the page. 2. Select print options, and then click **Print**. DO NOT use the Print toolbar button or the **File > Print** command in Internet Explorer. Those print options do not print the entire table.

	Use Voice Commands
	You can call the nurse assigned to a bed or room using your Vocera device.
	To call a nurse for Room 5423 Nurse, say this:
	`Call Room 5423 Nurse`
	To find who is assigned to Room 5423 Nurse, say this:
	`Who is in Room 5423 Nurse?`
	`Who is a member of Room 5423 Nurse?`

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