



ScheduleComplete ® Lite

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1 Introduction

The ScheduleComplete (R) Lite is an appointment scheduling system which is specifically oriented for small and medium size businesses, who depend on accurate, intelligent scheduling and resource allocation. The system allows you to start taking appointments or make resource reservations online, through an easy to use user interface. Our unique scheduling engine uses proprietary technology to perform advanced scheduling tasks, allowing you to avoid any scheduling mistakes and dynamically account for the schedule changes. This system is built as an add-on module to the DotNetNuke* (R) portal platform.

IMPORTANT!!!

This product is provided 'as is' without warranty of any kind, either expressed or implied, including, but not limited to, the implied warranties of merchantability and fitness for a particular use. We are not obligated to PROVIDE ANY SUPPORT FOR THIS PRODUCT, except if you have entered into additional paid support agreement directly with XP Idea, LLC. General support is provided at our "best effort" and is only through email.

Once installed, the module WILL NOT FUNCTION without an appropriate domain license file (*.LIC) . Please contact us to purchase the license or request a demo. In your message please make sure you include the DOMAIN NAME where you are going to install and use the module.

This is TRY BEFORE YOU BUY software. You can request a demo license before you buy it. The trial version of the software is fully functional and is not limited any way. After the trial period expiration the software will become completely disabled and will not function.

It may take up to 24 hours to receive the license. Most likely, licenses will not be shipped during our national holidays, weekends and anytime outside the regular office hours.

Once you purchase a license, you'll be given unlimited (here unlimited only means software will not have any time or functional limit) license for purchased domain(s). Once issued, a license CANNOT BE REVOKED, TRANSFERED OR MODIFIED in any way.

There is NO MONEY BACK, once a permanent license is issued.

*** DotNetNuke is a registered trademark of DotNetNuke Corporation. XP Idea, LLC and our ScheduleComplete product line are not affiliated with the DotNetNuke Corporation in any way.**

2 Prerequisites

This product is designed to work on DotNetNuke platform V4.x and V5.x, running ASP.NET 2.0 of .NET Runtime v3.5, under MS IIS 6 and MS IIS 7, MS SQL Server 2005 (all editions) and MSDE. **This product will not function without an appropriate license file. To obtain the license file please contact us (see "Contact Us" section).**

3 Installation

3.1 License file

After you have received the license file (*.LIC) , you will have to upload it into the /BIN folder of your site (side -by -side with DotNetNuke.dll). To do that,

please use any FTP software or alternatives provided by your web server host.

3.2 Installation of Private Assembly (PA) Module

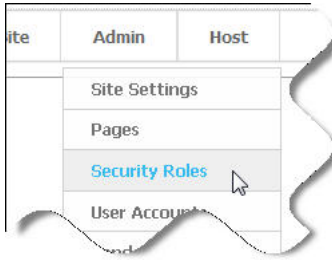
First, you will need to upload the module to the DotNetNuke (DNN) host:

1. Login to the DNN portal with a super user (HOST) account.
2. Go to the "Host" tab and select "Module Definitions".
3. In the corner of "Module Definitions" header click the drop menu and select "Install New Module".
4. A "File Upload" screen will appear.
5. Click the "Browse" button, and in the opened dialog box select "ScheduleComplete(XXXXXX).zip" file that you have received from us. Then click "Ok".
6. Click the "Install New Module" button to complete the installation.

Please make a note of any installation errors (if any) shown during the installation.

3.3 Security Roles

Using administrator's privilege (typically "Admin" account of DotNetNuke) please login to the portal (domain name) you will be using our product with. Select "Security Roles" from the "Admin" menu.



Then add the 3 security roles listed here (see below) to your portal. **It is extremely important to type them in exactly as they appear here, preserving casing and spaces:**

ScheduleComplete Admins

ScheduleComplete Managers

ScheduleComplete Users

 A screenshot of the 'Security Roles' management page in DNN. The page shows a table of roles with columns for Name, Description, Fee Every Period, Trial Every Period, Public, and Auto. Three roles are highlighted with a red box: ScheduleComplete Admins, ScheduleComplete Managers, and ScheduleComplete Users.

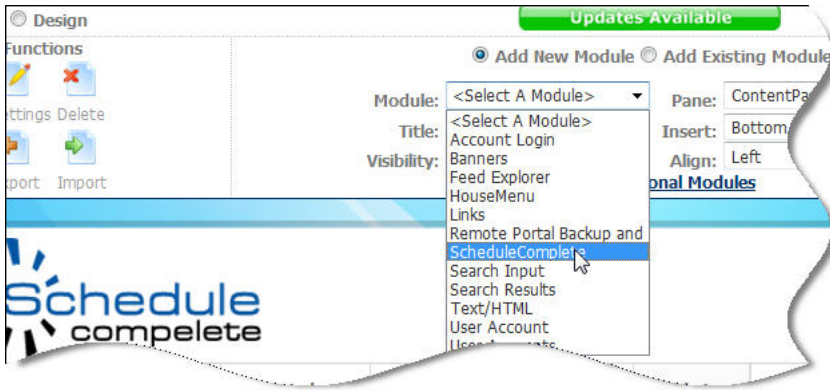
Name	Description	Fee Every Period	Trial Every Period	Public	Auto
Administrators	Portal Administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Registered Users	Registered Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ScheduleComplete Admins	People who are able to manage resources, define schedules and appointment types for a specific customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ScheduleComplete Managers	Includes customer reps who are able to see the schedules of all other people in the customer's company	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ScheduleComplete Users	All users who are able to see thier schedules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Subscribers	A public role for portal subscriptions	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

3.4 Website pages

You will need to create 4 new pages in the DNN portal. Page one will contain a Day/Month/Week view control, so please name it as "Schedule". Page two will contain scheduling UI - name it as a "New Appointment". Page 3 will contain the management UI- give it a "Setup" name. And page 4 will contain appointment reminders- name it as the "Reminders" (see page 9) (see page 9)". It is a good idea to make the "Schedule" page a landing page for your users. Please refer to DotNetNuke User's manual for more detailed

instructions on how to create pages.

Please go to the "**Setup**" page and add all "ScheduleComplete" modules to it.



Initially you'll see all of the modules on the page - so you'll have to move them to their own pages.

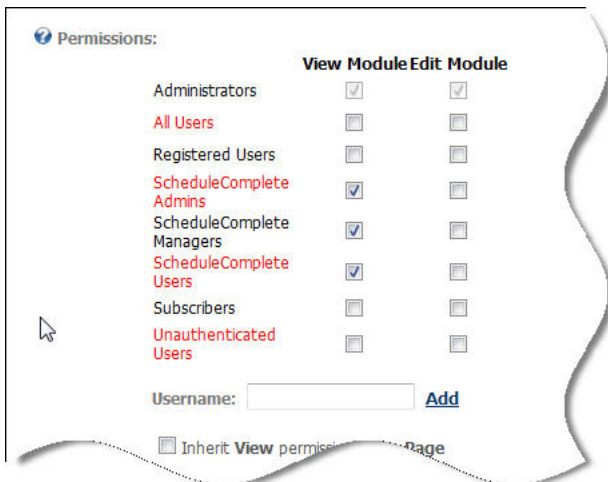
Please move "**ScheduleComplete - Schedule View**" module to a "**Schedule**" page. Once moved, please allow

ScheduleComplete Admins

ScheduleComplete Managers

ScheduleComplete Users

to view the module.



Once done, please come back to "**Setup**" page and move "**ScheduleComplete - Schedule Appointment**" module to the "**New Appointment**" screen.

Feel free to set any permissions on this module you want.

And finally, move the "**ScheduleComplete - Callback Reminders** (see page 9)" module from "**Setup**" page to the "**Reminders** (see page 9)" page. Please make sure

ScheduleComplete Admins**ScheduleComplete Managers**

have right to view this ("**ScheduleComplete - Callback Reminders** (☒ **see page 9**")) module and the "**Setup**" page.

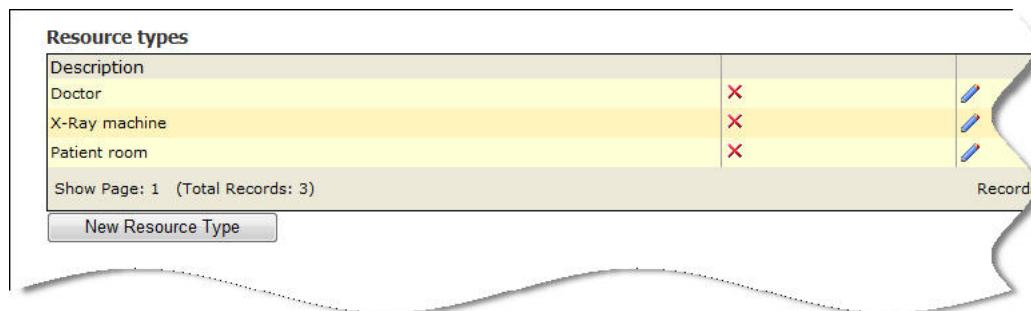
This completes installation process.

4 Configuration

System provides multiple configuration screens and is easy to setup. ScheduleComplete allows you to create Appointment Types. An Appointment Type defines appointment duration and resource types required. Resource Types are used to define groups of alike resources. Use the "**Setup**" page to edit all of the necessary data to allow your Operators to take appointments so they meet your business rules.

4.1 Resource Types

First you'll have to define Resource Types - a grouping of substitutable or alike resources - people, equipment and locations which may be easily substituted one for another. The system will pick available resources based on their type.



To create new resource type just click the "New Resource Type" button and enter the type name.

4.2 Resources

Then you will need to define resources and assign them to a resource type. For instance Dr.Goldbert and Dr. Dezi are resources of

"Doctor" type. Either of them can accept patients. Optionally you can define an availability schedule for each doctor (resource).

ScheduleComplete - Resources

Description	Login	Type	
Room 1		Patient room	X
Room 3		Patient room	X
Dr. Goldbert	mrgolbert	Doctor	X
Dr. Dezi	ddezi	Doctor	X
Room 2		Patient room	X
Radiology Rm1		X-Ray machine	X
Radiology Rm2		X-Ray machine	X
Room 4		Patient room	X

Show Page: 1 (Total Records: 8) Re

If resource is a person, and needs to be able to see his/hers appointments online - make sure you specify the login name in the Login name box, so the system will know which user's appointments to show in the calendar. Also don't forget to add this user to the "**ScheduleComplete Users**" role.

Please note - members of "**ScheduleComplete Admins**" and "**ScheduleComplete Managers**" roles are able to see everyone's appointments.

4.3 Appointment types

Finally, you will need to define an "Appointment Type" - the one that actually displays to the site visitor to choose from. An appointment type specifies availability of the schedule, required resources, and optional reminders (email or callback).

ScheduleComplete - Appointment Types

Description	Head Time (Minutes)	Duration (Minutes)
X-Ray exam	240	30
Office Visit	240	30

Description: X-Ray

Duration (minutes): 12

Head Time (minutes): 8 hrs

Appointment Start Interval: On the Quarter Hour

Notes to Call Operator:

Resource types: Doctor X-Ray machine Patient room

Always Daily Specific Date

Available Not Available

Sun Mon Tue Wed Sat

Start 08 : 00 End 17 : 00

Add Schedule

Reminder: Optional No Reminder

Duration sets an average appointment duration in minutes.

Head time defines how soon from this moment of time an appointment can be scheduled. Obviously - people will need time to arrive to the appointment place, so most of the appointments can't be scheduled right away.

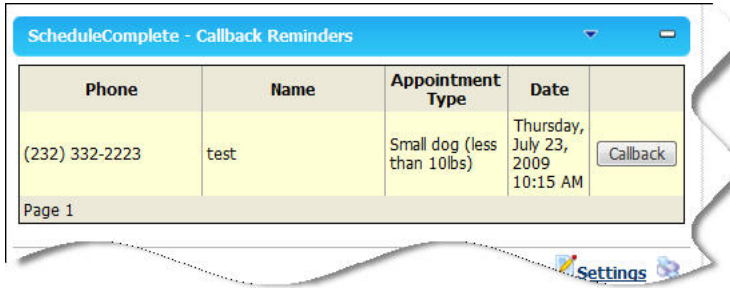
Notes to Call Operator - are notes displayed to a user during the scheduling. May be useful to provide some insight and set some expectations.

Resource Type - allows you to select which resources will be required during the appointment.

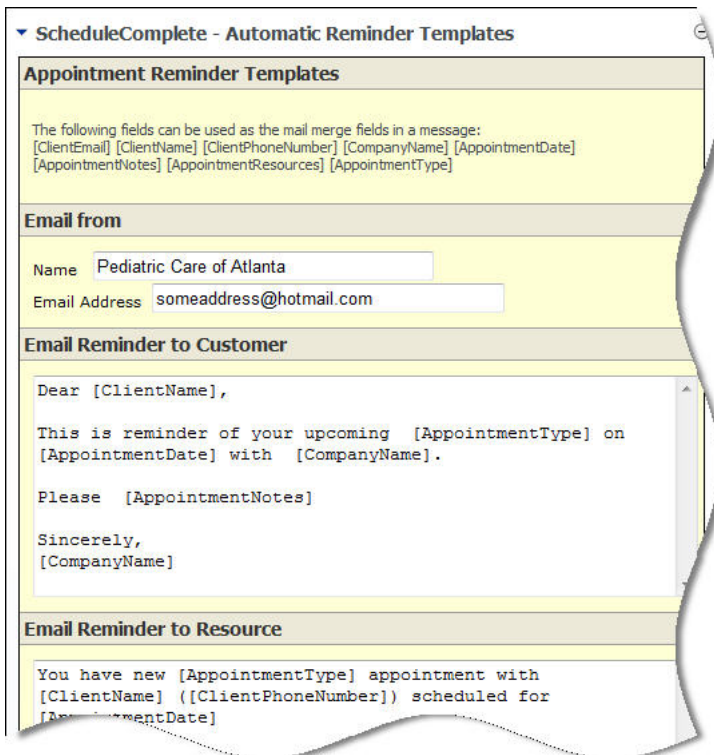
Schedule - use schedule to define overlaying schedule for this appointment type. For instance, even though resources might be available, given appointment can be done only in the morning, from 8-10 am (an X-Ray)

4.4 Reminders

Reminder list - is a list of upcoming appointments, typically used by the office staff to remind the customer about upcoming appointments.



Automatic email reminders are configured from the screen below and are self explanatory.



NOTE: Although the screen shot above does not show "Appointment confirmation message to on-line user" section, please keep in mind that anything you enter into that section will be displayed to a WEB user after (s)he successfully schedules appointment online. If nothing is entered there, the system will display simple "Thank you!" message.

4.5 Custom Schedules

The scheduling logic is easy and flexible enough to allow for custom schedules. Let's look at the following example, showing power of the scheduling logic.

A doctor of pediatrics, Karen, works Monday through Thursday from 8 am to 5 pm, and Friday from 8 am until 1 pm. Every day she has 1 hour lunch at 1 pm.

So, the first entry she'd make is her typical work week schedule - "Available", "Mon-Fri", 08:00-17:00

Then she'll have enter 2 exceptions - lunch time and short hours on Friday.

She'd enter "Not Available", "Mon-Fri", 13:00-14:00 for lunch and "Not Available", "Fri", 14:00-17:00 for the short work day.

Please see the screen shot below.

The screenshot displays three recurring appointment entries in a list. Each entry has a radio button for 'Always', 'Daily', or 'Specific Date', and another set of radio buttons for 'Available' or 'Not Available'. The first entry is 'Available' from 08:00 to 17:00 on Mon-Fri. The second entry is 'Not Available' from 13:00 to 14:00 on Mon-Fri. The third entry is 'Not Available' from 14:00 to 18:00 on Fri. Each entry has a 'Delete' button. At the bottom of the list is an 'Add Schedule' button.

That will complete her personal schedule as a resource. In addition to that, she'll be able to define schedules for each of the appointment types, which will mask her own schedule. For instance, a Radiology/ Ultrasound appointment is typically done in the morning hours, lets say from 8am - 10am.

So, for that appointment type she'd enter "Available", "Mon-Fri", 08:00-10:00. Once done, the Radiology/ Ultrasound patients will be able to schedule only in the morning, if she is available.

It is a good practice to define first "Available" schedule record as a base line, then add multiple exceptions to it.

4.6 Recurring Appointments

Our system allows to schedule recurring appointments as well. To enable users to schedule recurring appointments please select appropriate option on the Appointment Type edit screen:

Non-recurring option - indicates that the appointment cannot be recurring, therefore hides the recurring portion of the scheduling screen from a user.

Recurring - makes recurring options visible on the screen and requires recurrence to be entered during the scheduling

Let user decide - as it says, let user decide whether the appointment is recurring or not.

Resource types: gtt
 Type1

Reminder: Optional
 No Reminder
 Required

Remind in: 12 hours

Remind by: Email
 Callback

Is recurring appointment?
 Non-recurring
 Recurring
 Let user decide

When the last two options are selected the user will see a recurring control on the scheduling screen. It is very similar to MS Outlook's recurrence screen and is pretty strait forward.

Daily
 Weekly
 Monthly
 Yearly

Every 1 day(s)
 Every weekday

Recurring

Range of recurrence: End after 1 occurrences
 End by 31

Making a recurring appointment is really simple to a user, but in reality is very complex to the system, since it needs to consider resource availability for each recurrence. To schedule recurring appointment first select a starting date and time. Then click Recurring (if the control is not visible already). Make the choices you need and click "Schedule" to make the appointment recurring.

Note:When deleting the recurring appointment you'll be prompted whether to delete all past and future recurrences. When one of the recurring appointments is rescheduled it will be taken out of the recurrence and placed as a regular appointment to a new date/time

If "Exact date" check box on the top of the scheduling page is checked, the system will try to reserve appointment at the exact

date which recurrence specifies. If no appointment resources available that date, the scheduling will fail and user will see an error message,

If "Exact date" check box is unchecked - the scheduling engine will search for the next available appointment up to 30 days forward.

5 Contact Us

Website

<http://xpidea.com>

E-mail

Sales & Licensing: sales@xpidea.com

Support: support@xpidea.com

Phones

1(877) 300-2539 (Toll free)

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