



ORIGINAL

Contract Revision Date: 02/19/09

AGREEMENT NO. 380-S1010

SOFTWARE LICENSE QUOTATION
TELESTAFF LICENSE AND ANNUAL SERVICE AGREEMENT

This Agreement ("AGREEMENT") made by and between Principal Decision Systems International ("PDSI") that has its principal place of business at 50 Corporate Park, Irvine, CA 92606, and El Dorado County Sheriffs ("CUSTOMER"), that has its principal place of business at 300 FairLane, Placerville CA 95667, for the exclusive use of El Dorado County Sheriffs shall be subject to the following terms and conditions:

Whereas, PDSI has developed a telecommunications/computer technology which consists of certain software known as TELESTAFF; and

Whereas, PDSI imposes certain license requirements on customers desirous of purchasing a license for TELESTAFF; and

Whereas, CUSTOMER wishes to contract with PDSI to: (1) implement a license to use TELESTAFF, (2) train CUSTOMER on its configuration and use, and (3) as applicable, implement all licenses necessary to use TELESTAFF; and

Whereas, PDSI is willing to contract with CUSTOMER to: (1) grant CUSTOMER a license to use TELESTAFF, (2) train CUSTOMER on its configuration and use, and (3) as applicable, grant all licenses necessary to use TELESTAFF;

Now, therefore, in consideration of the mutual covenants and agreements herein contained and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, and intending to be legally bound hereby, PDSI and CUSTOMER do hereby agree as follows:

1. **Ownership and License of TELESTAFF**

Except as provided herein at paragraph 2(b), PDSI hereby grants to CUSTOMER a license to use TELESTAFF in object code form. CUSTOMER shall abide by the terms and conditions of this license as stated herein. The parties recognize and acknowledge that ownership of TELESTAFF shall remain with PDSI.

2. **Copyright and Proprietary Protection**

(a) TELESTAFF is owned by PDSI, and is protected by United States and international copyright laws and international trade provisions. CUSTOMER must treat TELESTAFF like any other copyrighted material. This License and CUSTOMER's right to use TELESTAFF shall terminate automatically if CUSTOMER violates any part of this AGREEMENT. In the event of termination for any reason other than non-renewal of Service and Support as described herein at Section 10, CUSTOMER must immediately return TELESTAFF and accompanying documentation to PDSI.

(b) CUSTOMER shall not:

- (i) Modify TELESTAFF and/or merge it into another program for CUSTOMER use except by express, written permission from PDSI. Any portion of TELESTAFF merged into another program following the express, written permission from PDSI will be subject to the terms of this AGREEMENT;
- (ii) Reverse engineer, disassemble, decompile, or make any attempt to discover the source code or methodology of TELESTAFF;
- (iii) Copy TELESTAFF for any reason other than to make one backup copy in machine-readable form for archival purposes;
- (iv) Use software other than TELESTAFF to connect directly to the Sybase database for the purpose of extracting, modifying, deleting, viewing and/or adding data. CUSTOMER acknowledges that such direct connection to the database violates the OEM agreement between PDSI and Sybase.

3. **Execution Date.** The Execution Date is defined as the date this AGREEMENT is signed by an authorized agent of CUSTOMER.

4. **Term.** This AGREEMENT is effective and binding upon PDSI and CUSTOMER upon the Execution Date as defined in paragraph 3 herein and shall remain in effect for a term of one (1) year, unless terminated as provided herein. On each anniversary date thereafter, this AGREEMENT shall automatically renew for a term of one (1) year, unless otherwise terminated as provided herein.

5. **Product Components.** The following constitutes a list of TELESTAFF components and associated fees that CUSTOMER does hereby agree to purchase from PDSI available in connection with the use of TELESTAFF. See Appendix A for the recommended TELESTAFF hardware specifications.

Initial	Component	Fee
	TELESTAFF Enterprise Software License for 140 SHERIFF Staff Members	\$ 19,600
	Sales Tax at 8.25% on TELESTAFF Software License	\$ 1,617
	TELESTAFF Implementation Services for 140 SHERIFF Staff Members	\$ 16,000
	One year of PDSI-hosted Web Access for 140 SHERIFF Staff Members	Included
	AUCTIONS Software License for 140 SHERIFF Staff Members	\$ 7,000
	Sales Tax at 8.25% on AUCTIONS Software License	\$ 577.50
	4 Port Telephony Hardware Qty: 1	\$ 1,000
	Sales Tax at 8.25% on 4 Port Telephony Hardware	\$ 82.50
	4 Port Telephony License (Dongle) Qty: 1	\$ 900
	Sales Tax at 8.25% on 4 Port Telephony License (Dongle)	\$ 74.25
	Sybase Concurrent Connections (1) Qty: 8	\$ 1,000
	Sales Tax at 8.25% on Sybase Concurrent Connections (1)	\$ 82.50
	10% MULTI AGENCY DISCOUNT	\$ -4,793.38
	Total Initial Acquisition Cost	\$ 43,140.38

6. **Pricing.** PDSI agrees to the fees reflected above in paragraph 5 until 4/29/2010.
7. **Payments.** CUSTOMER agrees that all pricing and amounts due hereunder are based on United States currency and that all amounts remaining unpaid for more than thirty (30) days following the date of the invoice shall be subject to an interest charge at the monthly rate of 1.5%. CUSTOMER does hereby agree to the payment terms for each component.

Initial	Component	Due
	TELESTAFF Enterprise Software License and applicable Sales Tax for 140 SHERIFF Staff Members	Due Upon Delivery of TeleStaff Software CD version 2.x
	TELESTAFF Implementation Services for 140 SHERIFF Staff Members	Due Upon Completion of deployment configuration as described in appendix B
	AUCTIONS Software License and applicable Sales Tax for 140 SHERIFF Staff Members	Due Upon Completion of advanced configuration training as described in appendix B
	4 Port Telephony Hardware and applicable Sales Tax	Due upon Delivery of Telephony hardware
	4 Port Telephony License (Dongle) and applicable Sales Tax	Due upon delivery of dongle
	Sybase Concurrent Connections (1) and applicable Sales Tax	Due upon delivery of Sybase connections

8. **Travel Expenses.** CUSTOMER agrees to pay for all travel expenses related to TELESTAFF implementation and training services as defined in Appendix B.
9. **Implementation Services.** Implementation Services include configuration of TELESTAFF as defined in Appendix B. CUSTOMER acknowledges that training and/or reconfiguration requested by CUSTOMER in addition to that defined in Appendix B will be at an additional cost.
10. **Telephony Service.** CUSTOMER acknowledges that the telephony capabilities included in TELESTAFF are designed to be compatible with POTS analog phone service from a local phones services provider, and that PDSI warrants the correct operation of the TELESTAFF telephony components only when connected to POTS analog phone lines. Should CUSTOMER attempt to connect TELESTAFF to PBX or other digital phone services, PDSI will not warrant correct telephony behavior nor will provide support for CUSTOMER's unique telephony solution.
11. **Annual Service and Support.** Service and Support of TELESTAFF is provided at no additional charge during the first twelve (12) months following the Execution Date. See Appendix C for the definition of Service and Support. CUSTOMER does hereby acknowledge that on each anniversary of the Execution Date, CUSTOMER may renew service and support under the following events:

Initial	Event	Payment
	TELESTAFF for 140 SHERIFF Staff Members - 1st Anniversary of the Execution Date	\$ 3,528
	AUCTIONS for 140 SHERIFF Staff Members - 1st Anniversary of the Execution Date	\$ 1,260
	Subsequent anniversaries during term	3% maximum increase over previous period

Should CUSTOMER elect not to renew Service and Support on the anniversary of any Execution Date, CUSTOMER acknowledges that any subsequent re-enrollment for Service and Support will only be accepted by PDSI after CUSTOMER cures the previous lapse in Service and Support by paying PDSI the Service and Support fee for the lapsed periods. In addition, CUSTOMER acknowledges that PDSI may assess CUSTOMER a Service and Support re-instatement fee that will not exceed ten percent (10%) of the Service and Support fee for the lapsed periods. PDSI reserves the right to discontinue Service and Support of previous releases of TELESTAFF as defined in Appendix C.

Should CUSTOMER increase the licensed capacity of TELESTAFF, CUSTOMER acknowledges that Annual Service and Support will increase as specified in Section 13 beginning with the next renewal period.

12. **Web Access.** Access to TELESTAFF via the web is hosted by PDSI. CUSTOMER does hereby acknowledge that on each event and for the fee specified below, CUSTOMER can renew web access:

Initial	Event	Payment
	Web Access for 140 SHERIFF Staff Members - 1 month after 1st Anniversary of the Execution Date	\$ 2,646
	Subsequent anniversaries during term	3% maximum increase over previous period

Should CUSTOMER elect not to renew web access or fail to pay the usage fee specified above in advance the subsequent 12 month period, CUSTOMER acknowledges that PDSI will disable CUSTOMER access from the Internet.

13. **Increases in License Capacity:** CUSTOMER may increase the capacity of its TELESTAFF license at a future date in increments of 50 staff members for an additional fee. CUSTOMER acknowledges that increasing its TELESTAFF license capacity will also cause an increase in Annual Service and Support, and Web Access services (PDSI-hosted Usage or Self-Hosted License and Annual Service and Support), if applicable. The following table shows the current pricing for all upgradeable components, however, pricing is subject to change without notice. Increases in TELESTAFF Annual Service and Support, PDSI-Hosted Web Access, and Self-hosted Web Access Annual Service and Support will be reflected at the first invoicing cycle following any TELESTAFF License Upgrade.

Initial	Event	Payment
	TELESTAFF License Upgrade	\$ 7,500 per 50 staff members
	TELESTAFF Annual Service and Support	22% of TELESTAFF License Upgrade PLUS current Annual Service and Support amount
	PDSI-hosted Web Access Usage Fee (if applicable)	15% of TELESTAFF License Upgrade PLUS current WEBSTAFF Usage amount
	Web Access Self-Hosted License Upgrade (if applicable)	\$ 3,000 per 50 staff members
	Web Access Self-Hosted Annual Service and Support (if applicable)	20% of Web Access Self-hosted License Upgrade
	Hourly rate for Additional Training as specified in Appendix B, ADDITIONAL TRAINING	\$ 200 per hour

14. **Limited Warranty.** PDSI WARRANTS TELESTAFF TO BE FREE FROM DEFECTS IN MATERIALS AND WORKMANSHIP UNDER NORMAL USE AND TO OPERATE IN REASONABLE ACCORDANCE WITH TELESTAFF USER MANUALS. HOWEVER, PDSI DOES NOT WARRANT THAT THE FUNCTIONS CONTAINED IN TELESTAFF WILL MEET CUSTOMER'S REQUIREMENTS OR THAT THE OPERATION OF TELESTAFF WILL BE UNINTERRUPTED OR ERROR FREE. THE LIMITED WARRANTY SET FORTH HEREIN IS IN LIEU OF ALL OTHER WARRANTIES, EXPRESSED OR IMPLIED, INCLUDING BUT NOT LIMITED TO THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE.
15. **Limitation of Liability.** PDSI'S ENTIRE LIABILITY AND CUSTOMER'S EXCLUSIVE REMEDIES SHALL BE THE REPLACEMENT OF TELESTAFF UPON NOTIFICATION OF REPORTED DEFICIENCIES. IN NO EVENT WILL PDSI BE LIABLE TO CUSTOMER, OR ANY THIRD PARTY, FOR ANY CLAIMS OR DAMAGES, INCLUDING ANY LOST WAGES, LOST PROFITS, LOST SAVINGS OR OTHER INCIDENTAL OR CONSEQUENTIAL DAMAGES, ARISING OUT OF THE USE OR INABILITY TO USE TELESTAFF EVEN IF PDSI HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.
16. **Indemnification.** Each party to this Agreement shall hold harmless and indemnify the other, and its directors, officers, employees and agents, from/for any and all liability claims, losses, and/or damages suffered by the other party, arising from or directly related to this Agreement, which is/are attributable to the negligent or intentional misconduct of the other party.
17. **Termination.** This AGREEMENT shall terminate upon the following events:
- (a) **Termination or Cancellation without Cause:** County may terminate this Agreement in whole or in part upon seven (7) calendar day's written notice by County without cause. If such prior termination is effected, County will pay for satisfactory services rendered prior to the effective dates as set forth in the Notice of Termination provided to Contractor, and for such other services, which County may agree to in writing as necessary for contract resolution. In no event, however, shall County be obligated to pay more than the total amount of the contract. Upon receipt of a Notice of Termination, Contractor shall promptly discontinue all services affected, as of the effective date of termination set forth in such Notice of Termination, unless the notice directs otherwise.
- (a) By mutual consent between both parties;

18. **Miscellaneous Provisions.**

- (a) **Amendments.** This AGREEMENT shall not be modified or amended except by another agreement in writing executed by the parties hereto.
- (b) **Entire Agreement.** This AGREEMENT, including Appendices A, B, C, and D (Users Manual/Implementation Guide) attached hereto, supersedes all prior discussions, understanding and agreement between the parties with respect to the matters contained herein, and constitutes the entire agreement between the parties with respect to the matters contemplated herein.
- (c) **Governing Law.** This AGREEMENT shall be construed and enforced in accordance with the laws of the State of California, and in the County of El Dorado.
- (d) **Taxes:** CUSTOMER agrees to pay any tax assessed on Product Components as specified in this agreement.
- (e) **Notices. Notice to Parties:** All notices to be given by the parties hereto shall be in writing and served by depositing same in the United States Post Office, postage prepaid and return receipt requested. Notices to County shall be addressed as follows:

COUNTY OF EL DORADO
SHERIFF'S OFFICE
300 FAIR LANE
PLACERVILLE, CA 95667
ATTENTION: PHIL DOLD, CONTRACT ADMINISTRATOR

or to such other location as the County directs.

With a carbon copy to:

COUNTY OF EL DORADO
CHIEF ADMINISTRATIVE OFFICE
PROCUREMENT AND CONTRACTS DIVISION
330 FAIR LANE
PLACERVILLE, CA 95667
ATTN: GAYLE ERBE-HAMLIN, PURCHASING AGENT

Notices to Contractor shall be addressed as follows:

PDSI – PRINCIPAL DECISION SYSTEMS INTERNATIONAL
TELESTAFF
50 Corporate Park
Irvine, CA 92606

or to such other location as the Contractor directs.

- (f) **No Waiver.** No failure on the part of any party hereto to exercise, and no delay in exercising any right, power or remedy or partial exercise of any right, power or remedy by any party will preclude any other or future exercise of any other right, power or remedy or partial right, power or remedy. No express waiver of assent by any party hereto to any default in any term or condition of this AGREEMENT shall constitute a waiver of or an assent to any succeeding default in the same or any other term or condition hereof.
- (g) **Assignability.** This AGREEMENT shall inure to the benefit of and be binding upon the parties hereto, their respective heirs, successors, assigns and personal representatives.
- (h) **Pricing.** Pricing provided for components in Section 5 apply only to PDSI products and services, and not for 3rd party products and services that integrate with or relate to TeleStaff (unless otherwise noted).

IN WITNESS WHEREOF, the parties have signed this AGREEMENT on the day and year first above written.

PDSI

By: Kathun P

Title: National Sales Manager

Date: 3/19/2010

El Dorado County Sheriffs (CUSTOMER)

Fred Kollar

Title: Sheriff Fred Kollar Date:

Phil Dold Date: 3/16/10

Contract Administrator, Phil Dold

-- COUNTY OF EL DORADO --

By: _____ Dated: _____

Chair
Board of Supervisors
"County"

ATTEST:

Suzanne Allen de Sanchez, Clerk
of the Board of Supervisors

By: _____ Date _____
Deputy Clerk

Appendix A – TeleStaff Hardware Specifications

PDSI DOES NOT TAKE RESPONSIBILITY FOR HARDWARE PURCHASED BY CUSTOMER

CUSTOMER IS RESPONSIBLE FOR IMPLEMENTING AND MAINTAINING THE TECHNICAL (HARDWARE/SOFTWARE/NETWORK) ENVIRONMENT IN WHICH TELESTAFF OPERATES. AS SUCH, CUSTOMER IS RESPONSIBLE FOR ALL ENVIRONMENTAL CONSIDERATIONS INCLUDING BUT NOT LIMITED TO OPERATING TELESTAFF IN VIRTUAL ENVIRONMENTS. CUSTOMER IS ALSO RESPONSIBLE FOR CONFIGURING FIREWALL AND SECURITY SETTINGS SO THAT TELESTAFF AND WEB ACCESS COMPONENTS ARE OPERATIONAL. IN ADDITION, CUSTOMER IS RESPONSIBLE FOR INSTALLATION AND MAINTENANCE OF ANALOG TELEPHONE PORTS AND/OR ALTERNATIVE DIGITAL OR VOIP SYSTEMS. PDSI SPECIALISTS CAN PROVIDE TECHNICAL INFORMATION AND RECOMMENDATIONS BUT CAN NOT BE RESPONSIBLE FOR CUSTOMER'S UNIQUE TECHNOLOGY ENVIRONMENTS.

NOTE: The following recommended specs are for a single server running all TeleStaff components.

Server Specs:

- a. <500 Staff
 - i. Dual Core Xeon Processor(s)
 - ii. 2GB RAM
 - iii. RAID-5 Storage (At least 15K RPM Drives)
 - iv. PCIe slot(s) for Dialogic Card(s)
 - v. Any Sound Device
- b. <1000 Staff
 - i. Quad Core Xeon Processor(s)
 - ii. 4GB RAM
 - iii. RAID-5 Storage (At least 15K RPM Drives)
 - iv. PCIe slot(s) for Dialogic Card(s)
 - v. Any Sound Device
- c. <2000 Staff
 - i. Dual Quad Core Xeon Processor(s)
 - ii. 4GB RAM
 - iii. RAID-5 Storage (At least 15K RPM Drives)
 - iv. PCIe slot(s) for Dialogic Card(s)
 - v. Any Sound Device
- d. >2000 Staff
 - i. Dual Quad Core Xeon Processor(s)
 - ii. 8GB RAM
 - iii. RAID-5 Storage (At least 15K RPM Drives)
 - iv. PCIe slot(s) for Dialogic Card(s)
 - v. Any Sound Device

Operating System:

The following Operating Systems are currently supported for the Server:

- Windows Server 2000
- Windows Server 2003
- Windows Server 2003 Enterprise Edition

Please note: Currently only 32-bit Operating Systems are supported.

To utilize more than 3GB of RAM you must use the Enterprise version of Windows Server.

Telephony Components (Purchase from PDSI):

- 4- or 12-port port Dialogic Telephony system
 - D4PCIU4SW – PCI 2.2x compliant board (universal connector)
 - D4PCIU4SEW – PCI Express form factorBoth the D4PCIU4SW and D4PCIU4SEW are 4 port cards. They are half-length.
 - D120JCTLS – PCI 2.2x compliant board (universal connector)
 - D120JCTLSEW – PCI Express form factor
- Both the D120JCTLS and D120JCTLSEW are 6 port cards, which can support up to 12 lines. They are full-length.
- Telephony system dongles (4- or 12-port)

Sybase Licenses (Purchase from PDSI):

- Sybase Client database license (7 concurrent users)
- Sybase Studio database license (1 concurrent user)

Phone System: Telephony features of TeleStaff are tested and compatible with the **POTS analog telephone standard**. PDSI does not support department phone systems that are not compliant with this standard.

TeleStaff Performance: TeleStaff performance can degrade depending on a number of factors, including, but not limited to, number of staff members in the database, number of concurrent users, and complexity and number of staffing rules and roster alarms. **If the potential for any of these factors exists, PDSI recommends a dual-core processor server with at least 4 GB of RAM and recommends that the City consider component distribution as discussed below.**

OPTION: Application Distribution

TeleStaff comprises multiple software applications that can operate on separate hardware devices. In some situations, improved performance may be achieved by separating processing-intensive applications and deploying them on separate servers. Common distribution methods include separating and deploying the Database Management System (DBMS), the business logic processing (Middle Tier) and the Telephony components. Application distribution can occur at any time. **For departments with over 1000 users, PDSI recommends utilizing more than 1 server.**

Recommended Client Machine Specs:

- Pentium IV Class 2.4 GHz CPU
- 1 GB RAM
- 40 GB Hard Drive (Note: TeleStaff databases do not take up significant HD space, but most machines come with 70+ GB by default)
- Computer sound card (If you want to hear/record voices in the TeleStaff database)
- Speakers (to hear TeleStaff recordings)
- Microphone (if you want to record voices in the TeleStaff database)
- Network Interface Card
- Windows 2000, Vista, or XP

The customer may connect additional PCs to the TeleStaff system by installing the TeleStaff client software (included) provided they are connected to the TeleStaff system by a network using the TCP/IP protocol.

Appendix B – TELESTAFF Implementation Services Partnership Agreement

IT IS EXTREMELY IMPORTANT THAT CUSTOMER READ AND UNDERSTAND THE FOLLOWING:

For the fee for Implementation Services specified in paragraph 5 of this AGREEMENT, PDSI will train CUSTOMER staffing administrators on the operation of TeleStaff and will train CUSTOMER on how to configure the TeleStaff system using CUSTOMER data. The following steps comprise a summary of the TeleStaff Implementation Services. NOTE: This Appendix outlines the recommended approach to the implementation process, based on PDSI's experience with its customers. Because of the highly configurable nature of TeleStaff, there may need to be changes to the Implementation Process and Services described below. (NOTE: A PROJECT PLAN DETAILING SPECIFIC CUSTOMER DELIVERABLES, MILESTONES, AND SCHEDULE WILL BE DEVELOPED BY CUSTOMER AND PDSI DURING THE PROJECT.)

DEPLOYMENT PLAN: The following tasks are part of the Deployment Implementation Process. When a customer completes these tasks they will be in production with the TeleStaff Roster and Calendar and will be able to reap the benefits associated with centralized staffing, audit trails, emergency notifications, reports, and feeds to down stream systems in following a fast track approach. At the end of this process, users will be able to request leave, sign up for overtime, and respond to emergency call outs via phone, client, or web access.

- **Project Initiation:** The PDSI Customer Sales Representative transfers all pertinent CUSTOMER information gathered during the sales process to the PDSI Project Manager (PM). An INTRO CALL with the PM, Sales Representative, and CUSTOMER SPONSOR will be held to discuss expectations, and roles and responsibilities. This meeting is to ensure the appropriate resources are assigned to the CUSTOMER Project team and that the scope of the project is accurately defined. The PM is responsible for guiding the CUSTOMER through the implementation process; however, the **CUSTOMER is ULTIMATELY RESPONSIBLE FOR A SUCCESSFUL IMPLEMENTATION**, which includes allocating the appropriate resources. Once the information has been transferred, the PM will send the CUSTOMER an Implementation Welcome Packet containing an overview of the Implementation Process and information on how to prepare for TeleStaff.
- **Project Planning:** A PROJECT PLAN CALL with the PM, Sales Representative, and CUSTOMER SPONSOR will be held to create and refine the project plan. The Project Plan details the specific tasks with due dates, predecessors, and owner. The plan also details the customer and PDSI deliverables, milestones, and status information. After the call, a Project Plan will be provided to the CUSTOMER.
- **Project Kick-Off:** The PM and CUSTOMER Project Team will hold a KICK-OFF CALL to review the Project Plan, with particular focus on project scope, objectives, product functionality, project team roles and responsibilities, and a roadmap for the implementation. Dates for CONFIGURATION TRAINING(S) will be discussed. Lastly, the PM will direct CUSTOMER to review the training videos and review training manuals which can be downloaded from the TeleStaff website. In order to understand basic TELESTAFF functionality and terminology, it is imperative that every member of the Project Team reviews this tutorial BEFORE DATABASE REVIEW. CUSTOMER will provide Daily Detail Roster Sheets before DATA COLLECTION.
- **Hardware Setup:** Prior to DATABASE REVIEW, CUSTOMER must have TELESTAFF server and software installed and functional. PDSI will ship any TELESTAFF hardware (that was purchased through PDSI – dialogic telephony cards, dongles, etc.) to the CUSTOMER and provide the necessary installation documentation.
- **Data Collection:** This phase begins with a DATA COLLECTION Web Conference call with the PM and the Project Team, during which the PM will instruct the Project Team to collect, organize, and format pertinent CUSTOMER data for the creation of the TELESTAFF database. During the call, the PM will also review organization structure with the CUSTOMER. The CUSTOMER will provide a cross-section of data which the PM will use to create a database.
- **Database Review:** Once PDSI receives all pertinent data from the CUSTOMER, the PM will create a TELESTAFF database. The PM and CUSTOMER review the initial database (via Web Conference). The PM will make recommendations to the CUSTOMER as to how to rework the database to accurately reflect the CUSTOMER organizational structure. The CUSTOMER will then spend time re-working the database.
- **Deployment Configuration:** The PM will work with the CUSTOMER via Web Conference calls to perform basic configuration of TeleStaff, including work codes and rules associated with work code usage. After each call, the CUSTOMER will apply the acquired knowledge and complete the setup tasks.
- **Testing & End-User Training:** Once the roster and work codes are configured by the CUSTOMER, rigorous testing must be undertaken by CUSTOMER. CONFIGURATION TESTING must include testing of all components that the CUSTOMER needs for Deployment of the roster, calendar, and work codes, which may include: phones, Contact Manager, Line Manager, Task Manager, E-mail Manager, Fax Manager, and the Gateway (in the case that the system is interfacing with a Third-party application). CUSTOMER will be responsible for creating a test plan, assigning super users to test the system, creating test scripts, and conducting any configuration re-work necessary to get the system ready. CUSTOMER is also responsible for end-user training (including creating a training plan, creating training documentation, and conducting super-user and end-user training classes).
- **Deployment:** Deployment is typically in 2 stages: parallel testing for 2 weeks, then full Deployment of the roster, calendar, and work codes in a production environment throughout the entire organization.

Advanced Configuration Plan is PHASE 2 of Implementation. These services apply if section 5 above has included the fees associated with PHASE 2

ADVANCED

CONFIGURATION PLAN: The following tasks are part of the Advanced Configuration Process. Once the CUSTOMER has successfully deployed the TeleStaff Roster, Calendar, and Work Codes into a production environment, they can proceed to the Advanced Configuration Process to add intelligent staffing functionality to TeleStaff. At the end of this process, staffers will be able to automate intelligent staffing functionality in TeleStaff.

- **Review Project Scope:** PM will work with the CUSTOMER to review project scope and objectives.
- **Staffing Process Review:** PM will instruct the CUSTOMER on how to effectively analyze and document the current process the department follows in order fill any vacancies that occur. After the staffing diagrams are completed, a call occurs with the PM and the core Project Team to review the current staffing process. The current process is defined and, if necessary, revised and standardized within the department.
- **Advanced Configuration Training:** CUSTOMER must dedicate appropriate resources to configuration training. The purpose of the ADVANCED CONFIGURATION TRAINING is to train the CUSTOMER on how to configure for intelligent staffing, have the CUSTOMER actually configure the data, and begin testing the configuration.

ADVANCED CONFIGURATION - The CUSTOMER will have several Advance Configuration options, which are detailed below. The PM will work with the CUSTOMER to determine the appropriate resources to attend ADVANCED CONFIGURATION TRAINING. During this these session(s), the PM will work with the CUSTOMER to configure the CUSTOMER data base with more advance features of TeleStaff.

ADVANCED CONFIGURATION OPTIONS: All classes are 5 days in duration

Option A: at PDSI's training facility in Irvine, CA on customer's production DB

Option B: at PDSI's training facility in Irvine, CA on customer's test DB

Option C: at customers' location using customer's production or test DB

Option D: held via a series of web-conferences on customer's production or test DB

Option E: at PDSI's training facility remotely connected to customer's production or test DB

CONFIGURATION FOLLOW-UP - There will be up to 4 half-day (4-hour) Web Conferences (maximum of 16 hours) with the PM to help the CUSTOMER complete and test the configuration. If the 16 hours allotted for this week are not used, they do not roll over into subsequent phases.

- **Testing and Training:** Once TELESTAFF is fully configured by CUSTOMER, rigorous configuration testing must be undertaken by CUSTOMER. CONFIGURATION TESTING must include testing of all components that CUSTOMER needs for Go-Live, which may include: phones, Contact Manager, Line Manager, Task Manager, E-mail Manager, Fax Manager, and the Gateway (in the case that the system is interfacing with a Third-party application). CUSTOMER will be responsible for creating a test plan, assigning users to test the system, creating test scripts, and conducting any configuration re-work necessary to get the system ready. CUSTOMER is also responsible for any additional training (including creating a training plan, creating training documentation, and conducting super-user training classes). During the testing/training phase, the PM will be available to support this process for a maximum of 10 hours, which must be scheduled IN ADVANCE. These allotted hours of PM support will expire within a certain time frame (to be determined and agreed with CUSTOMER during planning) and, if not used by CUSTOMER, will not roll over after this period.
- **Production with Advanced Functionality:** Go-live is typically in 2 stages: parallel testing for 2 weeks, then going into production with advanced staffing functionality. PM and PROJECT TEAM will review the PDSI TeleStaff Help Desk procedures. From this point forward, the Help Desk will be the first point of contact for technical issues with TELESTAFF.

Appendix C – Annual Service and Support

"Normal Business Hours" are 6:00 AM through 6:00 PM (Pacific Standard Time), Monday through Friday, excluding holidays and other office closures (notification of which will be provided to CUSTOMER).

All Software Errors reported by CUSTOMER shall be resolved as set forth below. Initial response by PDSI will be based upon CUSTOMER's full description of the problem. Resolution response will be based upon the priority assigned by PDSI as defined below. If CUSTOMER determines that a Software Error exists, CUSTOMER shall notify PDSI through PDSI's web portal (<http://slxweb.pdsi-software.com/>), providing the exact verbiage from error messages, screenshots showing details, and any other information relevant to giving an accurate description of the error. The ticket number generated by the portal shall be used for all subsequent inquiries relating to the original problem. Please contact your Customer Account Manager for a unique login ID and password. Outside of Normal Business Hours, CUSTOMER will open a ticket through the Web Portal then notify PDSI of the problem by telephone. Telephone notification will be made to PDSI's support line at (866) 324-1598.

The main support line will be answered either by a PDSI representative or an automated attendant at all hours. During Normal Business Hours, each trouble report by phone will be assigned a support ticket number and updates will be entered through the Web Portal. The call will be handled according to the priority assigned by PDSI. In the case of priority-one problems, as noted below, CUSTOMER may be able to speak directly to a TeleStaff Support Representative if one is available. Outside of Normal Business Hours, Priority 1 support, as described in this appendix, will be made available through a pager system. The phone number is 866-324-1598. Priority 1 support is available 24 hours per day, 7 days per week to CUSTOMER's with a LIVE status. All other problems will be handled through updates to the ticket, which generate an email or a callback. If requested or so stipulated in the response time criteria below, a PDSI representative will return the call or e-mail in a manner consistent with the priority and order in which the call was received. CUSTOMER shall make every effort to respond to PDSI in a timely fashion when requests are made to follow-up calls or additional documentation on the reported problem.

Priorities are assigned as follows:

Priority One

Hours of Availability:	24 hours/day, 7 days/week
Description:	A critical software error that severely impacts the ability of CUSTOMER to perform ALL automated staffing functions (TeleStaff is down). This level of priority is only available to CUSTOMER's that are using TeleStaff in a production environment (LIVE accounts ONLY).
Initial Response:	During Normal Business Hours, immediate response if a Support Representative is available. Otherwise, PDSI will respond within one hour. Outside of Normal Business Hours (including holidays), PDSI will respond with a call back within two hours. All responses will be provided through the Web Portal (email) or by callback.
Resolution Response:	PDSI will work aggressively to provide CUSTOMER with a workaround solution or to completely resolve the problem.
Notification:	It is the responsibility of CUSTOMER to alert PDSI of possible Priority-One issues by calling PDSI at 866-324-1598. PDSI will update CUSTOMER of progress frequently during problem resolution and notify CUSTOMER once the workaround has been provided or the problem has been resolved.

Priority Two

Hours of Availability:	Monday through Friday, 6:00 AM to 6:00 PM, Pacific Standard Time.
Description:	A non-critical software error, which prevents the user from performing a data entry or system administration function. These do not include cosmetic, documentation, or reporting problems. These also do not include questions or inquiries regarding the operation of the software or its installation and training.
Initial Response:	During Normal Business Hours, PDSI will respond within three hours. Outside of Normal Business Hours (including holidays), PDSI will respond by the next business day. All responses will be provided through the Web Portal (email) or by callback.
Resolution Response:	PDSI will provide a workaround for CUSTOMER when possible. PDSI will provide a problem resolution in the form of an Upgrade or modification to the Software in an upcoming Update.
Notification:	PDSI will notify CUSTOMER when a workaround has been provided or the problem has been resolved.

Priority Three

Hours of Availability:	Monday through Friday, 6:00 AM to 6:00 PM, Pacific Standard Time.
------------------------	---



Description:	All other software or documentation errors not described above. These include but are not limited to: <ul style="list-style-type: none">• Reporting errors or calculation problems• Documentation inaccuracies• Cosmetic issues• Misspellings• Product Enhancement requests• Questions or inquiries relating to TeleStaff Software functionality, system administration or installation
Initial Response:	PDSI will respond to these items if specifically requested to do so at the time of the request. If a reply is requested, PDSI will respond within one Business Day.
Resolution Response:	PDSI will correct documentation errors in upcoming releases of the documentation.
Notification:	If requested, PDSI will notify the CUSTOMER when a workaround has been provided or the problem has been resolved.

Appendix C – Annual Service and Support Continued

TeleStaff Enhancements

The TeleStaff version number consists of three numbers that define the type of product release. The format of the TeleStaff version number is:

Version X.YZ where

- Changes in **X** represent a significant change in product functionality (**Major Release**)
- Changes in **Y** represent an enhancement to the product that increases functionality within the existing Major Release and is typical of an evolving product (**Enhancement Release**)
- Changes in **Z** represents a minor change to the program to accommodate a software error or cosmetic change (**Update Release**)

Under the TeleStaff Service and Support plan, CUSTOMERs will receive **Update Releases** and **Enhancement Releases** as they become available at no additional charge. **Major Releases** will be available for an additional fee.



Appendix D

Implementation Guide



Introduction

Welcome to the TeleStaff Implementation Guide. This guide is a reference for the TeleStaff project team. There is no copyright restriction on this document. You are welcome to copy this guide for all members of the project team.



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Section 1 Getting Started

Introduction

Congratulations on the purchase of TeleStaff!

A PDSI Project Manager (PM) has been assigned to work with the TeleStaff Project Team to successfully implement TeleStaff in your organization or department.

By the time you receive this packet, the **Introduction Call** between the Project Sponsor and the PDSI PM will have occurred. The purpose of the call was to discuss project scope and expectations, purchase justification, resource allocation, and roles and responsibilities.

The next step in implementing TeleStaff for your organization is to hold a series of calls to develop and finalize the **Project Charter**. Once the charter has been signed by your organization and PDSI, the official **Project Kick-off Meeting** will occur between the entire Project Team and the PDSI PM.

The information presented in Section 1 and 2 of this guide will be reviewed during the Project Kick-Off meeting.



Preparing for Project Kick-Off

Please make arrangements for the Implementation Project Team members to have copies of this document and to read Section 1 and 2 of it **BEFORE** the Kick-Off Meeting.



Roles and Responsibilities

Forming the right Project Team is a critical first step to ensure the success of a TeleStaff implementation. The TeleStaff Implementation Project Team will comprise key people from the customer organization and from PDSI. The team members will work together to guide the project to completion.

Project Sponsor

The TeleStaff Project Sponsor is ultimately responsible for the success of the project. It is critical that the Sponsor remains involved at a high-level for the duration of the project.

The sponsor is:

- ▣ A high-level business executive who supports and mandates the implementation of TeleStaff
- ▣ A champion for TeleStaff who creates an environment conducive to change through on-going communications to the Project Team and the user community

The Sponsor is the project representative who:

- ▣ Assists in the preparation and maintenance of the Project Charter
- ▣ Selects the project lead and ensures that this is a dedicated resource for the duration of the project
- ▣ Selects the Project Team and assigns resources as needed for the duration of the project
- ▣ Assigns resources to ensure on-going administration and maintenance of TeleStaff once the implementation project is completed
- ▣ Has high-level decision-making authority
- ▣ Acts as the escalation path for issues, concerns, or questions from the PM, project lead, Project Team, and user community
- ▣ Signs off on project milestones
- ▣ Implements Change Management

Project Lead

The project lead role can be handled by one person (with a back-up) or two people with representation from IT and business/operations.

The project lead:

- ▣ Ensures accountability for on-time deliverables as per the project plan
- ▣ Owns the daily project management task and is responsible for managing the project and keeping it on track
- ▣ Coordinates the project team and ensures tasks are completed on time
- ▣ Allocates resources to the project team per the project plan (subject matter experts)
- ▣ Works closely with the PM – daily or weekly as required per project phase
- ▣ Escalates to the sponsor on a timely basis, when necessary
- ▣ Attends configuration training at PDSI

Project lead qualifications:



- ❑ Confident leader with support of the users and the rest of the project team
- ❑ Decision-maker with authority to make decisions
- ❑ Positive “can-do” attitude
- ❑ Business knowledge is high and staffing knowledge is excellent
- ❑ Dedicated to the project, if possible. If not, then other tasks should be reduced.
- ❑ Must stay on the project for the duration. Should not be subject to transfer or retirement for 6 months (estimated project duration)
- ❑ Dedicated, organized, and conscientious of timeframes
- ❑ Accessible to project team during regular business hours
- ❑ Computer literate

Project Manager (PM)

The PM’s role is to support the entire project team throughout the implementation process and guide the project to a timely and successful resolution.

The PM:

- ❑ Provides project management support
- ❑ Schedules status meetings
- ❑ Provides expertise on data collection, staffing rules, configuration, and application set-up
- ❑ Owns and manages the project plan and updates it on a weekly basis to reflect an accurate schedule
- ❑ Communicates project plan updates to the project team
- ❑ Provides expert advice and support on all matters pertaining to data collection and staffing diagram creation
- ❑ Creates initial TeleStaff database
- ❑ Leads the staffing process review, database review, and database configuration training classes.
- ❑ Prepares the project team to successfully cutover to staffing exclusively with TeleStaff

Other Project Team Members

Customer

- ❑ Staffing expert representation – Subject Matter Expert(s)
- ❑ Payroll representation – Subject Matter Expert(s)
- ❑ IT representation – Subject Matter Expert(s)
- ❑ Union representation (if applicable) – Subject Matter Expert(s)

PDSI Team Members

PDSI also provides the following resources to support the implementation project:

Product Specialist (Help Desk)



- Provides technical support for all hardware/networking related issues, as well as technical product issues
- Supports the customer after successful completion of configuration training.

Want



to ensure a successful implementation?
Allocate the right resources!

PDSI's experience with over 550 customer implementations during the past 10 years proves that a critical factor in ensuring a successful TeleStaff implementation is the appropriate allocation of resources by the customer.

The customers who completed the implementation project in a timely manner and are staffing successfully with TeleStaff selected **PROJECT TEAM LEADS** with sufficient time available to lead the project, who possess excellent staffing knowledge for the entire agency, support the implementation of TeleStaff, and have decision-making authority.

Successful customers have also carefully considered a contingency plan for the project lead. If the project lead is injured, falls ill, or is unexpectedly transferred, etc. before the project ends, there must exist a back-up lead who has knowledge of TeleStaff and the implementation process, has been involved with the project from the Kick-off Call, and who can carry the project to its successful conclusion and ensure project momentum.

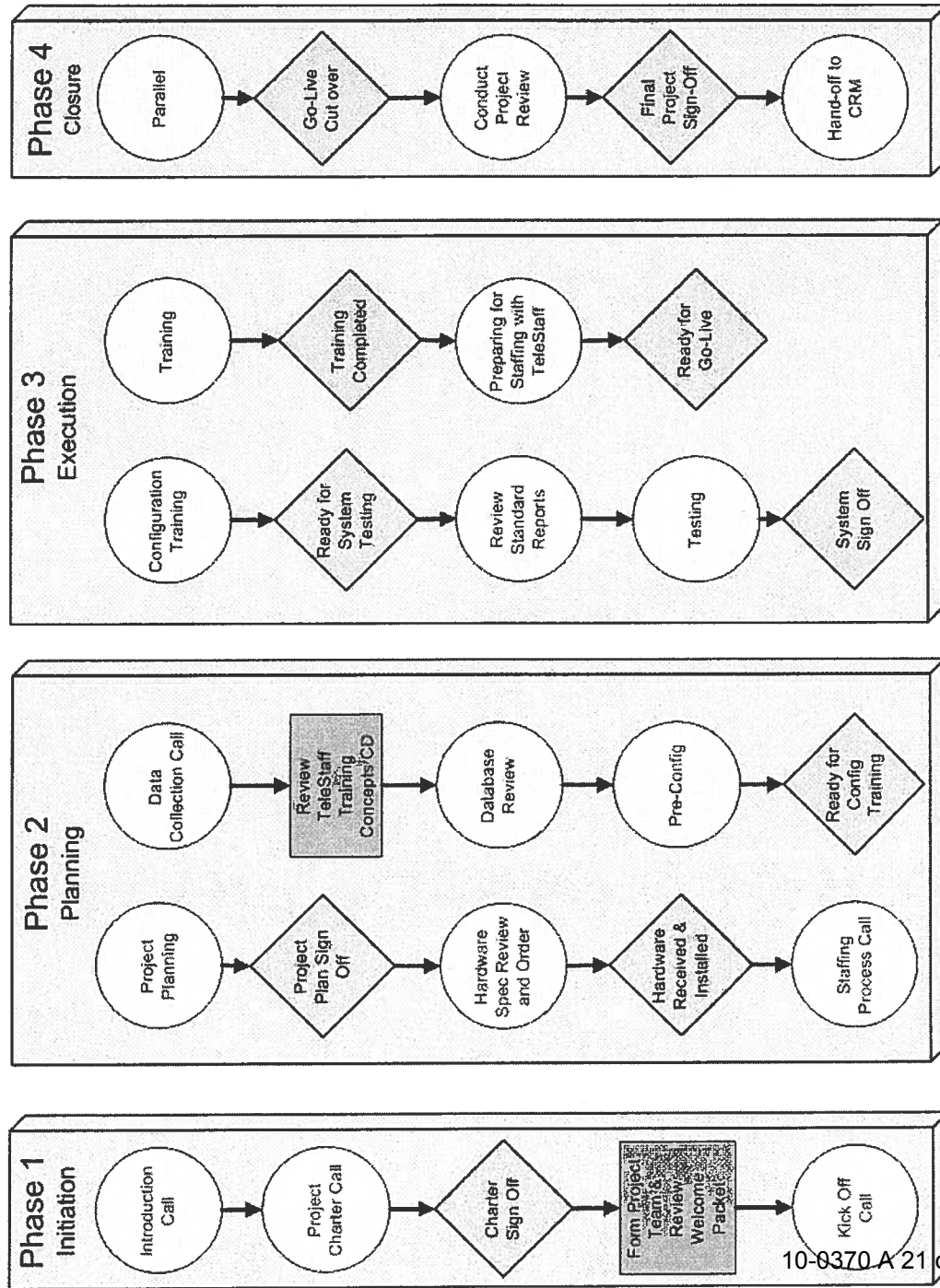
In addition to project leads, the customer must ensure the availability of various **SUBJECT MATTER EXPERTS** with the requisite expertise during various stages of the project. The subject matter experts need to be made available to conduct tasks at critical times during the project (as per the project plan).

Implementation Project Risks

There are many factors that increase the risk of project failure. These common implementation hurdles must be managed throughout the implementation process:

1. Unrealistic expectations of TeleStaff
2. Project lead goes on extended leave, is not available to the project team, and/or does not have the hours available to lead the project
3. Insufficient resources allocated during the data collection, testing, and training phases
4. Miscommunication between management, union, and IT
5. Incomplete database or diagrams prior to configuration training
6. Delays in training end-users

TeleStaff Implementation Process Overview Flow Chart



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TeleStaff Implementation Process

Following is a summary of the recommended approach to the TeleStaff implementation process which is based on PDSI's experience with implementing TeleStaff successfully. Because of the highly configurable nature of TeleStaff, there may be changes to the implementation process described below for your particular implementation project.

The implementation project has four major phases: Initiation, Planning, Execution, and Closure.

Phase 1 - Initiation Phase

Introduction Call

The **Introduction Call** is the initial meeting to ensure appropriate resources are assigned to the Implementation Project team and the scope of the project is accurately defined.

Project Charter Call(s)

During the first **Project Charter Call**, the customer's organization structure is discussed to determine the number of configurations and databases required for the correct implementation of TeleStaff.



Single or multiple databases?

- When there are multiple agencies with distinct rules, each agency requires a separate configuration.
- If there is true sharing of resources (i.e. there is cross-over between departments on a consistent basis, or mandatory over-time across all groups, and positions can be filled from any group), a single database is recommended.
- If there is not true resource sharing amongst departments, and simply bulk cross-over a few times per year (for example) then multiple databases (where there are multiple agencies) are recommended.

Welcome Packet & Implementation Guide

The project lead receives these documents from the PM or Sponsor. They review the Welcome Packet and distribute the contents as necessary to the team members.

The project lead distributes the Implementation Guide to the project team members that will attend the Kick-off Call. Sections one and two should be read by all team members prior to the call.

Project Plan


The PM, Sponsor, and project lead refine the **Project Plan** for this implementation's timeline.

The Project Plan details the specific tasks with due dates, predecessors, and owner. The plan also details the customer and PDSI deliverables, milestones, and status information.

Kick-off Call

After the Project Charter and Project Plan are finalized, the entire team participates in a **Kick-Off Call** to review the following key components of the project:

- Introduction of project team members
- Review project cost justification and objectives

- 
- Review team roles and responsibilities
 - Overview of implementation process phases and general time line
 - Instruct the project team on how to analyze and document the staffing rules (Refer to Section 3 of this guide for details)
 - Review Items needed for staffing process review and data collection call
-



Project Kickoff Action Items

- Provide PM with sample rosters, organization charts, and staffing diagrams/process flows
- Project Team reads the End-User Tutorial Guide and watches the End User Training video, which can be downloaded from: www.telestaff.com



Phase 2 - Planning Phase

Hardware Planning

Shortly after the Kick-off call, the PM and the IT Lead review the hardware specifications related to the TeleStaff server, phone lines, telephony components, and Web access module (if applicable).

Appropriate hardware and software is ordered.

Hardware Setup

The IT Lead works with the PDSI Help Desk to setup the TeleStaff server and install the dialogic board and dongle. Phone lines are also be installed per PDSI's recommendations at this time.

Finally, the web access module and the TeleStaff components (Line Manager, Task manager, and Contact Manager) are installed with the assistance of the Help Desk.

Staffing Process Review and Data Collection Call

After the staffing diagrams are completed, a call occurs with the PM and the core Project Team to review the current staffing process. The current process is defined and, if necessary, revised and standardized within the department.

Once the staffing process has been fully documented, the data collection portion of the call occurs. The PM prepares the project team for the data collection process and :

- Instructs the project team on how to collect, organize, and format pertinent personnel and organizational data for the creation of the TeleStaff database (Refer to Section 2 of this Guide for details)
- Reviews the organizational structure and makes recommendations as to how it can be represented in TeleStaff

Immediately after the Data Collection call, the Project Team will:

- Spend up to a week gathering personnel and departmental data and completing the Microsoft Excel worksheet.
- Send the spreadsheet to the PM
- Make changes to spreadsheet per recommendations of the PM

After the data spreadsheet is finalized, the PM creates the TeleStaff database.

Team Preparation

After the data collection process, the Project Team reviews the training videos, training guides, and the configuration manual to fully prepare for the implementation and ensure that the team is comfortable with TeleStaff terminology and functionality.



Understanding Basic Terminology



It is very important that the team members who will attend configuration training understand basic TeleStaff functionality and terminology.

Every member of the project team must read the **End-User Manual** (available for download from www.TeleStaff.com in the **Customer Support Area**) and watch the corresponding **TeleStaff Training Concepts videos**.

Included in your Welcome Packet is a **PDSI Resource Guide**, which includes your login and password for the Client Area and instructions on how to download this presentation. You can make as many copies of the above documentation as needed.

Database Review

In the **Database Review Call**, the PM reviews the initial database (via Web Conference) with the core Project Team.

- The PM makes recommendations to the project team as to how to modify the database to more accurately reflect the organizational structure, if necessary.
- The project team spends time re-working the database, if necessary.
- This process of modification and review under the guidance of the PM continues until the database is ready.

Pre-Configuration

There are typically two Pre-Configuration calls of four hours in duration. These calls are scheduled within a week of each other.

On these web conference calls the PM and the core project team work together to perform basic setup and configuration of the customer's organizational data. The following items in the Setup (General) area of TeleStaff are created (review section 4 for details):

1. Work Codes
2. Shifts, Shift Groups, Shift Masks, Shift Rotations
3. Ranks, Specialties, and Groups
4. Pay Information
5. Special Days
6. Roster clean-up/adjustments
7. Deployable units/events
8. Formula IDs

After each call, the project team applies the acquired knowledge and completes any assigned homework. During these pre-configuration calls, the PM may review TeleStaff Advanced Concepts training, which includes:

- Calendar
- Roster
- Manage People
- Filters



Pre-configuration Action Items



To be completed before configuration training:

- Analyze staffing rules
- Create new staffing rules and procedures
- Develop payroll codes

The Configuration Training class is critical to the success of the implementation project; therefore, it is important for the configuration training team to prepare as fully as possible.

In the weeks prior to configuration training, while the pre-configuration tasks are finalized, the project lead should ensure that every member of the configuration training team is involved in the data collection, data review, and pre-configuration tasks of the project.

The configuration training team is responsible for bringing back to the department the knowledge they receive during the configuration training class and for leading the testing of the system and the training of the end-users.

This is a huge responsibility and it is imperative that the right people are assigned to this team.

It is also important for each person on the configuration training team to be completely familiar with TeleStaff (basic functionality and terminology) and the implementation process *before* the configuration class begins.

The PM will hold a **Preparing for Configuration Training Conference Call** with the configuration training team to review TeleStaff terminology and ensure the team is ready for the training week.

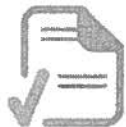


Is your team ready for configuration training?

Each member of the configuration training team must check “yes” to each of the following questions before attending configuration training at PDSI.

PDSI may reschedule configuration training if the team is not adequately prepared:

1. Have you reviewed the TeleStaff End-User Manual?
2. Have you reviewed the TeleStaff Concepts Training CD?
3. Have you reviewed the TeleStaff Advanced Concepts training manual?
4. Have you read the TeleStaff Configuration Training Manual?
5. (All above documentation is available for download from www.PDSI-software.com/client)
6. Have you completed the database review?
7. Have you completed the pre-configuration reviews? Have you completed staffing diagrams?



Is your environment ready for configuration training?



PDSI will ship TeleStaff hardware (dialogic telephony card and dongle) to the Project lead or the IT Lead along with the necessary installation documentation.

Prior to Database review, the IT Lead should have the TeleStaff server, software, and (when applicable) the web access module, installed and functional. We recommend that the lead schedule an appointment with the PDSI Help Desk for installation assistance.

(Review Section 5 of this guide. Visit <http://tech.telestaff.com> to build installation documentation.)

Phase 3 - Execution Phase

Configuration Training



Who Should Attend configuration training?

The Project Lead/Project Sponsor assigns a maximum of 4 people to the configuration training team:

- **Project Lead – Mandatory**
- **Business Rules/Staffing Experts – Mandatory**
- **Up to 2 other Subject Matter Experts (including Union, payroll, RMS/CAD, and IT representation)**

Is it mandatory for IT and/or Payroll personnel to attend training?

No, it is not necessary for IT or Payroll staff to attend. Configuration Training is focused on configuring the application to staff according to your rules. IT staff will work with PDSI Help Desk staff to configure hardware, install software, test components of TeleStaff, ensure the system meets customer security protocols, and ensure performance of the system is acceptable. Technical support will also be available to help set up TeleStaff interface with other systems, including payroll.



For each database configuration required (determined during the Initiation Phase), the Project team lead must commit the appropriate resources to the configuration training team. The configuration training team must be available for TWO CONSECUTIVE WEEKS of configuration training. This includes one week at PDSI and a follow-up week after they return to the department. The purpose of the configuration training is to:

- Teach the configuration training team to configure TeleStaff to staff according to your business rules
- Have the configuration training team conduct configuration tasks using proprietary data
- Ensure the configuration training team has acquired the knowledge to return home and complete the configuration, test the system, and train staffers and end-users
- Begin testing the configuration, if time permits

Configuration training at PDSI

The configuration training team attends 5 consecutive days of training at PDSI's training facility in Irvine, CA. The class is fast-paced and intense. It goes from 9 a.m. to 5 p.m. every day, and adequate preparation by every team member is crucial.

During the configuration week, the PM works exclusively with the configuration training team to configure TeleStaff to fill vacancies based on your staffing rules and policies.

At the end of the fourth day of configuration training, the PM works with the configuration training team to begin documenting the post-TeleStaff staffing process in a Standard Operating Procedure manual (SOP). This SOP should be completed and maintained once the team returns to the department.

At the end of each day of configuration training, the PM reviews a check-list of any action items to be covered the next day.

On the last day, the PM reviews the configuration training experience. The following points will be discussed and documented:

1. Which parts of the configuration process can be improved?
2. How much of the configuration was completed?
3. What remains to be configured?
4. What are the next steps to complete the configuration?
5. Configuration "to-do" list

The PM schedules the times for the following week's post configuration training web conferences.

Configuration training follow-up

The week immediately following configuration training, the configuration training team will focus on completing all outstanding TeleStaff configuration tasks.

The PM is available from Tuesday to Friday for half-day (4-hour) web conferences (a.m. or p.m.) to help the configuration training team complete all configuration tasks. The number of follow-up sessions will vary and will be dependent on the actual configuration. Typically, there are two to four follow-up sessions scheduled.

These web conferences will be scheduled in advance and the dates and times will be reviewed on the last day of configuration training at PDSI.

Note: If the hours of PM time allotted for configuration training follow-up are not used by the customer, they do not roll over into subsequent phases.

The PM reviews the terms of the Customer Support Agreement and Help Desk procedures. After the configuration follow-up calls are completed, the Help Desk becomes the primary support point of contact for the customer.

Reports Overview

During the configuration follow-up week, the customer project team evaluates the TeleStaff standard reports to determine if additional reports are needed.



Testing & Training

Preparation

The PM and the Testing Coordinator discuss how to prepare for system testing, including:

- How to develop a Test Plan
- How to develop Test Scripts (PM can provide samples)
- How to determine who should be involved in testing (i.e. super-users, key sponsors of the system, change agents)
- How to capture and document errors/bugs/enhancement requests resulting from testing

The Testing Coordinator uses this information to develop a **Test Plan** and **Test Scripts** in preparation for unit and user acceptance testing.

The PM and the Training Coordinator will discuss how to prepare for end-user training, including:

- Reviewing Section 6 of this guide
- Developing a Training Roll-Out plan
- Developing training materials (based on “day-in-the-life” scenarios)
- Preparing resources for department-wide training
- Preparing for cultural change

The Training Coordinator develops the **Training Plan** and training documentation in preparation for staffer and end-user training.

System Testing

Once TeleStaff is fully configured, rigorous system testing occurs by the selected testers, per the Test Plan. System Testing includes testing all the components needed for staffing successfully with TeleStaff: phones, Contact Manager, Line Manager, Task Manager, E-mail Manager, Fax Manager, and the Gateway (if TeleStaff interfaces with a Third-party application).

The Testing Coordinator is responsible for creating the Test Plan, assigning users to test the system, creating Test Scripts, capturing the results of testing, and notifying the configuration training team of any configuration re-work necessary to get the system ready.

Training

The Training Team conducts **Staffer/Administrator training classes** per the Training Plan. Key administrators of the system receive expert-level training as well as end-user training. These people may be selected to train end-users.

The Training Team and selected administrators conduct **end-user training classes** per the Training Roll-Out Plan. This training is based on scenarios that typical end-users will encounter on a daily basis.

PDSI Testing/Training Support

- During the testing/training phase, the PM is available to support the project team for a maximum of 20 hours.
- These hours must be scheduled in advance.
- If any portion of the allotted hours for testing or training support is not used, they cannot be carried forward to another phase.



Preparing for Staffing with TeleStaff

If applicable, the PM provides the Web access module Account ID.

An additional 8 hours of web conference time (two four-hour calls) with the PM will be scheduled the week before the cutover date. These **Go-Live Prep** conference calls are scheduled by the PM.



Does the department need additional configuration training?

Scheduled training time with the PM (in addition to what is listed in the Implementation Guide or the TeleStaff License Agreement) will be charged on a per hour basis, plus expenses.
For further information or to purchase additional training from PDSI, please contact the PM.



Phase 4 – Closure Phase

This phase is typically accomplished in two stages:

1. Parallel processing for 2 weeks
2. Cutover to staffing exclusively with TeleStaff

The cutover date is the date on which TeleStaff becomes the exclusive system for staffing. No other staffing system runs in parallel to TeleStaff.

The initial cutover date for staffing with TeleStaff does not typically include integration with payroll, RMS/CAD, or other systems. If applicable, the integration process with these other systems also consists of a parallel phase before the cutover date.

The Help Desk will remain the first point of contact for technical issues with TeleStaff. The PM will continue as the Customer Service contact *for a limited time*.

Please contact the PM to schedule time to review TeleStaff configuration-specific issues.



Section 2 Data Collection

Data collection is a critical part of the TeleStaff implementation process. In order to create a TeleStaff database for the department, PDSI needs to import the department's personnel and organizational information into TeleStaff. The customer project team collects the departmental data in an Excel Spreadsheet and delivers it to the PM for review. The PM reviews the spreadsheet with the customer project team via web conference call(s) until the correct structure is achieved.

Once the data is finalized, the PM generates a TeleStaff database for the department which will be used for pre-configuration training. The PM conducts pre-configuration meetings to train the project team on defining shift patterns, entering special days, setting up shift rotations, etc., in preparation for configuration training.

An example is provided below of the data that will be collected in Microsoft Excel™ format:

The screenshot shows a Microsoft Excel spreadsheet titled "TS 2.5 - File Spreadsheet.xls [Compatibility Mode] - Microsoft Excel". The spreadsheet is in "Compatibility Mode" and shows a data collection template for employee information. The template is organized into columns A through G, with rows 1 through 5. Row 1 contains field names and their respective data types. Row 2 contains the field names: Employee ID, Payroll ID, First Name, M.I., Last Name, 1st Contact, and 2nd Contact. Row 3 contains the data types: max. 30 alphanumeric char., max. 30 alphanumeric char., max. 20 alphanumeric char., max. 1 alphanumeric char., max. 20 alphanumeric char., max. 50 alphanumeric char., and max. 50 alphanumeric char. Row 4 contains example data: 1-800-850-7374, 1-800-850-7374, P:1-800-850-7374 -- Pager, F:1-800-850-7374 -- Fax, E:bob@pdsi-software.com -- email, and E:bob@pdsi-software.com. Row 5 is empty. The spreadsheet is displayed in a window titled "Sheet1" with a status bar showing "Ready" and "100%".

	A	B	C	D	E	F	G
1	max. 30 alphanumeric char.	max. 30 alphanumeric char.	max. 20 alphanumeric char.	max. 1 alphanumeric char.	max. 20 alphanumeric char.	max. 50 alphanumeric char. 1-800-850-7374 P:1-800-850-7374 -- Pager F:1-800-850-7374 -- Fax E:bob@pdsi-software.com -- email	max. 50 alphanumeric char. 1-800-850-7374 P:1-800-850-7374 -- Pager F:1-800-850-7374 -- Fax E:bob@pdsi-software.com
2	Employee ID	Payroll ID	First Name	M.I.	Last Name	1st Contact	2nd Contact
3							
4							
5							



Step 1 Select the Import Manager Data Fields

Each field listed below represents a data element that can be imported for each employee. Review each field to determine if that field is desirable to import into TeleStaff. A description of each field is provided in this section. Please keep in mind that this checklist will define only the fields that are desirable for the *initial* creation of the database.

- *Please do not delete any columns on this spreadsheet even if you choose not to utilize a non-mandatory field.*

The second step in this process is to hold the Data Collection call. During this call, we will review all columns. You can re-import fields into the database afterward. Use the below checklist to tag the fields you wish to utilize for TeleStaff (Mandatory fields are **bolded**):

Person Information – General

- **EMPLOYEE ID** – This mandatory field holds the employee ID number for each person and is limited to maximum of (30) alphanumeric characters. The employee ID identifies the person in TeleStaff and serves as the person's TeleStaff Login ID.
- **PAYROLL ID** – This mandatory field holds the payroll ID for each person and is limited to maximum of (30) alphanumeric characters. This ID must match the ID recorded in the existing payroll system.
- **FIRST NAME** – This mandatory field holds the person's first name and is limited to maximum of (20) alphanumeric characters. Do NOT enter the name information in UPPERCASE because it may distort the TeleStaff roster.
- **M.I.** – This field holds the middle initial for each person and is limited to a maximum of (1) alphanumeric character.
- **LAST NAME** – This mandatory field holds the last name for each person and is limited to maximum of (20) alphanumeric characters. Do NOT enter the name information in UPPERCASE because it may distort the TeleStaff roster.
- **1st Contact** – This field holds the primary contact number of the person and is limited to maximum of (50) alphanumeric characters. TeleStaff automatically formats this field, so if any alpha characters are entered, they are translated into numeric characters. Only one contact method can be defined in this field. Home phone, cell phone, pager, fax number and email can be used as contact methods in TeleStaff. Area codes are only needed for phone numbers that reside outside the area code in which the server resides. If an Area Code is entered, a '1' or '9' need not be entered. Pager numbers should be preceded with a 'P:' (P:123-4567), fax numbers preceded with an 'F:' (F:456-7890) and email addresses should be preceded with an 'E:' (E:staffmember@email.com). PDSI highly recommends utilizing this field when generating a new TeleStaff database; however, it may be imported at a later date.
- **2nd Contact** – This field holds an alternate contact method for the person and is limited to maximum of (50) alphanumeric characters. Refer to 1st Contact description above.



- 3rd Contact – This field holds an alternate contact method for the person and is limited to maximum of (50) alphanumeric characters. Refer to 1st Contact description above.
- 4th Contact – This field holds an alternate contact method for the person and is limited to maximum of (50) alphanumeric characters. Refer to 1st Contact description above.
- ADDRESS (Line One) – This field holds the first address line for each person and is limited to a maximum of (40) alphanumeric characters.
- ADDRESS (Line Two) – This field holds the second address line for each person and is limited to a maximum of (40) alphanumeric characters.
- CITY – This field holds the city name where each person resides and is limited to maximum of (40) alphanumeric characters.
- STATE – This field holds the state abbreviation where each person resides and is limited to maximum of (2) alphanumeric characters.
- ZIP – This field holds the postal code for each person and is limited to a maximum of (20) alphanumeric characters.
- BIRTHDATE – holds the birth date for each person and is limited to maximum of (10) numeric characters in a date format of mm/dd/yyyy.
- GENDER CODE – This field holds the code for Gender and is limited to a maximum of (1) alphanumeric character. The required default is M:Male and F:Female.
- RACE CODE – This field holds the race code information for each person and is limited to a maximum of (1) alphanumeric character.
- OTHER(s) – This field holds information of another contact for this person and is limited to maximum of (40) alphanumeric characters.

Person Information – Profiles General

- **JOB TITLE** – This mandatory field holds the name of the person's Job Title (or Rank) and is limited to maximum of (40) alphanumeric characters. This field is required for creating an assignment and profile for the person in TeleStaff; if the field is left blank, no Profile or Assignment will be created by the Import Manager. To avoid a cluttered TeleStaff roster, use a data format of abbreviation:long name (e.g., O:Officer, FF:Firefighter, SUP:Supervisor). Abbreviations are limited to (10) alphanumeric characters. We also recommend NOT to use all capital letters in any long name.
- **JOB SKILL** – This field dictates a person's Job Skill and is limited to maximum of (11) numeric characters. Job Skill can be used during sorting algorithms to distinguish between staff with the same Job Title. Unlike Job Level, Job Skill is not limited to sorting staff in ascending or descending order. Job Skill can focus on a specific level of a Job Title. For example, an Administrator Job Title is defined with having Job Skills 1, 2, and 3; with 1 being the most experienced.




You can configure TeleStaff to specifically select an Administrator(s) with a Job Skill = 2 for a staffing list.

- **CAN ACT AS** – This field holds the name(s) of the person’s “Can Act As” job titles and is limited to a maximum of (256) alphanumeric characters. “Can Act As” is the field that defines the job titles a person can move up or move down to work. The job titles in this column must match those defined in the Job Title column. To avoid a cluttered TeleStaff roster, use a data format of abbreviation:long name. Abbreviations are limited to (10) alphanumeric characters. If the person has multiple Can Act As Job Titles, separate each Job Title with a comma with no spaces (e.g., O:Officer,SUP:Supervisor).
- **SPECIALTY** – This field holds the specialties for the person and is limited to maximum of (256) alphanumeric characters. A Specialty is a unique identifier that can define a requirement for a specific staffing need. TeleStaff lists can select personnel by specialty. Furthermore, an expiration date can be attached to the specialty to tag when the specialty will expire. To avoid a cluttered TeleStaff roster, use a data format of abbreviation:long name(expiration date) (e.g., TRN:Trainer(11/11/2008)). Abbreviations are limited to (10) alphanumeric characters. If there is more than one specialty, enter them as a comma-delimited list: (e.g., TRN:Trainer,HM:Hazmat(04/04/2008),REC:Recruiter).
- **GROUP** – This field dictates the group(s) that a person is assigned and is limited to a maximum of (256) alphanumeric characters. Groups can be used for specific staffing needs. For example, persons who are assigned a Special Events group can be pulled by TeleStaff to fill for a Special Events vacancy on the TeleStaff roster. To avoid a cluttered TeleStaff roster, use a data format of abbreviation:long name (e.g., SE:Special Events). Abbreviations are limited to (10) alphanumeric characters.

Person Information – Profiles Advanced

- **PROMOTION DATE** – This field holds the promotion date for the person’s Job Title and is limited to a maximum of (10) numeric characters in a mm/dd/yyyy date format. Promotion date is often used in TeleStaff as sorting criteria for a qualified staffing list.
- **OPPORTUNITY NUM.** – This field dictates a person’s individual opportunity number and is limited to a maximum of eleven (9,2) numeric characters. Opportunity numbers are useful in ordering a group of persons based on a specific ranking. For example, seniority can be defined with a person’s hire date and their score on the entrance exam. Assigning persons an opportunity number enables TeleStaff to sort a staffing list based on the seniority level of the person in relation to the entire department. This field is typically left blank during the initial creation of a TeleStaff database.
- **HOURLY WAGE** – This field holds the hourly wage information for each person and is limited to a maximum of eleven (7,4) numeric characters. TeleStaff cost



reports are dependent on the information provided in this field. TeleStaff automatically formats this field and a currency symbol is not required.

- **SPECIAL DATE** – This field holds the special date for each person and is limited to a maximum of (10) numeric characters formatted as mm/dd/yyyy. Special date is typically the hire date of the person, but can also represent any date-sensitive criteria necessary for fair staffing.
- **LICENSE NUM.** – This field holds the driver's license number for each person and is limited to maximum of (40) alphanumeric characters.
- **LICENSE CLASS** – This field holds the license class information for each person and is limited to maximum of (20) alphanumeric characters.
- **LICENSE EXP.** – This field holds the license expiration date information for each person and is limited to maximum of (10) numeric characters in mm/dd/yyyy date format.
- **LOCATIONS** – This field holds the location information for each person and is limited to maximum of (100) alphanumeric characters. Locations are used for proximity configurations in TeleStaff and typically hold the city name of the person. For example, when a vacancy occurs at a station you can configure TeleStaff to find an available person who resides closest to that vacancy. This field is typically left blank during the initial creation of a TeleStaff database. To avoid a cluttered TeleStaff roster, use a data format of abbreviation:long name. For example, L1:Location 1. Abbreviations are limited to (10) alphanumeric characters.

Person Information - Assignments

- **SHIFT** – This mandatory field holds one regularly assigned shift for each person and is limited to maximum of (40) alphanumeric characters. The Import Manger will not create an Assignment for the person if this field is left blank. If a person works on several shifts, list only one and setup an assignment rotation after the database has been generated. To avoid a cluttered TeleStaff roster, use a data format of abbreviation:long name (e.g., A:Shift A). Abbreviations are limited to (10) alphanumeric characters.
- **SHIFT MASK** – This field holds one shift mask for each person and is limited to maximum of (40) alphanumeric characters. A Shift Mask reflects a person's regularly assigned days off. Use a data format of abbreviation:long name (e.g., T/Th:Tuesdays and Thursdays Off). Abbreviations are limited to (10) alphanumeric characters. A Shift Mask must have a corresponding shift. If a person is missing a shift, the Import Manager will not assign a Shift Mask. If you wish to Import Shift Masks please contact the PM.
- **AGENCY** – This mandatory field holds the agency assignment for each person and is limited to maximum of (40) alphanumeric characters. The Import Manager will not create an assignment for a person in TeleStaff if the Agency field is left blank. To avoid a cluttered TeleStaff roster, use a data format of



abbreviation:long name (e.g., PDSI:Principal Decision Systems International). Abbreviations are limited to (10) alphanumeric characters.

- **REGION** – This mandatory field holds the region assignment for each person and is limited to maximum of (40) alphanumeric characters. The Import Manager will not create an assignment for a person in TeleStaff if the Region field is left blank. To avoid a cluttered TeleStaff roster, use a data format of abbreviation:long name. Examples: PB:Patrol Bureau or B1:Battalion 1 or ADM:Administration. Abbreviations are limited to (10) alphanumeric characters.
- **STATION** (or equal to) – This mandatory field holds the station assignment for each person and is limited to a maximum of (40) alphanumeric characters. Persons who do not have an assigned Station can enter their *preferred* Station or leave blank. If left blank the person will be unassigned in TeleStaff. To avoid a cluttered TeleStaff roster, use a data format of abbreviation:long name (e.g., A1:Area 1, S1:Station 1). Abbreviations are limited to (10) alphanumeric characters.
- **UNIT** (or equal to) – This mandatory field holds unit assignment for each person and is limited to a maximum of (40) alphanumeric characters. Persons who do not have an assigned Unit can enter their *preferred* Unit or leave blank. If left blank the person will be unassigned in TeleStaff. To avoid a cluttered TeleStaff roster, use a data format of abbreviation:long name (e.g., U1:Unit 1, P1:Post 1, OS:Office Staff). Abbreviations are limited to (10) alphanumeric characters.

Roster Information

The Agency, Region, Station, and Unit fields determine the setup of the TeleStaff roster. Below is a roster representation of the above assignment for Jeffrey Salazar:

Agency	Region	Station	Unit
Tech Coast Law Enforcement	Field Operations	North	Patrol
<input type="checkbox"/> Wednesday January 19, 2005			
<input type="checkbox"/> Tech Coast Law Enforcement			
<input type="checkbox"/> Field Operations			
<input type="checkbox"/> W-Sun Day Shift			
<input type="checkbox"/> North			
<input type="checkbox"/> Motor Unit			
	Sergeant M	Dalton, Charles D. (M/RI)	000005
	Officer M	Cadan, Frank A. (DRE/M)	009511
	Officer M	Langeliers, Scott R. (AR/M)	009902
<input type="checkbox"/> Patrol			
	Captain	Graves, Lauren A. (RI/ST)	001450
	Sergeant	Salazar, Jeffrey J. (AR/RI/ST)	000102
	Officer	Trenholm, Robert	000117
	Officer	Jones, Bob F.	000875
	Officer	Heredia, William	000211

Agency	Region	Station	Unit
Tech Coast Fire	Battalion One	Station One	Engine 1



-	Tuesday July 19, 2005		
-	Tech Coast Fire		
-	(01) Battalion One		
-	A Shift		
-	(01) Station One		
-	Engine 1		
	Captain	Salazar, Jeffrey A. (HM/PM)	00102
	Engineer	Suarez, Mark J.	00085
	FireFighter	Mosqueda, Michael (HM)	00117
	FireFighter	Aguilar, Lewis	00186
-	SAM 1		
	FireFighter PM	Van, James E. (PM)	00175
	FireFighter PM	Gammon, Albert (PM)	00157
-	Truck 1		
	Captain	Garcia, Robert J.	00041
	Engineer	Waelder, David D.	00066
	FireFighter	Ybarra, Michael D.	00132



Additional Information

- **RETIRED** – This required field dictates whether the person is actively working and is limited to a maximum of (1) alphanumeric character. The required default is Y:Yes and N:No. PDSI recommends importing only active personnel when creating a new TeleStaff database.
- **POSITION NAME** – This field holds the position name information for each person and is limited to maximum of (40) alphanumeric characters. By default, TeleStaff uses Job Titles to name the positions defined under each unit. If the organization has another definition for position names, define that name in this field. This field is typically left blank during the initial creation of a TeleStaff database.

DO NOT USE THE FOLLOWING CHARACTERS in the spreadsheet:

> < ' & " ; = +



Section 3 Diagram Staffing Rules and Procedures

A key step in preparing for configuring TeleStaff for your organization is to analyze the staffing rules and procedures that govern how the department staffs fairly. An effective way to accomplish this is to create staffing diagrams that detail the procedures used to maintain a daily staffing roster.

Staffing Process

The goal is to effectively describe the *current* processes the department follows in order to fill any vacancies that occur. The focus is on what you currently do today, not the future process with TeleStaff. **Note: if your rules are changing, then you should diagram or describe the new rules that will be enforced with TeleStaff.**

This section describes how to define and diagram critical staffing information needed for the TeleStaff Implementation Project.

Use the questions and examples that follow as a starting point for completing this task. The method used to accomplish this goal is up to the department. The PM preferred methods are diagrams or bullets.

Purpose:

- To get the department to think about and review their Staffing Processes before configuration so that during the Configuration Class valuable time is not wasted debating on how to fill any vacancies.
- Help the PM to understand the current staffing process to establish a baseline for configuration class.

Required items:

1. A process flow for every vacancy that will be filled (e.g., Captain, Lieutenant, Officer, etc.).
2. Timing dependencies – future, immediate, and all staffing times in between
3. Minimum staffing rules
4. Pool of candidates – on duty, off duty, available
5. Qualifications – rank, specialty
6. Criteria used to exclude someone – overworked, on duty, protected leave
7. Sorting criteria
8. Are there special events that are scheduled on a regular basis?
9. Do you use backup or reserve units?

Twenty questions:

1. Does the department backfill vacancies?
2. If applicable, what are the vacancies that will be back-filled? [Use the staffing diagrams to explain *how* they are back-filled.]
3. Does the department staff differently whether the vacancy is 7 days out, 1 day out or even 1 hour out?
4. Does the department staff vacancies differently depending on the work code that caused the vacancy?
5. Does the department have minimum staffing? If so, how does the department staff when below minimum levels?



6. How does the department staff when above minimum? Are vacancies suppressed?
7. Does the department staff differently on holidays?
8. Does the department have specialties that affect staffing?
9. Does the department have promotional and/or approved lists (a staff member may not have passed the Captain's test, but still qualifies to work as a Captain)?
10. Are on duty people qualified to move?
11. Does the department holdover people?
12. Does the department consider all off duty people or only those who have made themselves available?
13. Does the department allow people to sign-up for overtime? Anti-sign-up (everyone is assumed available unless they sign up to NOT be available)?
14. What qualifies a person? Is it job title, acting ability, unit/position, specialty, on duty/off duty, etc?
15. What makes a person unavailable? Over-worked (fatigued), Protective leave (vacation or sick), already on OT, on last duty day, etc.?
16. How much time-off does a staff member need before they can work again?
17. How does the department sort (total OT hours, last date worked, and seniority – promotion date, hire date)? When do the hours reset (date range)?
18. How does the department break a tie when sorting equal candidates?
19. Does the department have special events, such as city events, sporting events, etc. that need to be staffed differently?
20. Does the department have backup or reserve engines that are deployed for wild land fires, brush fires, natural disasters, etc?

Special Staffing Considerations:

1. Does the department have shift differentials? If so, what is the timeframe the shift differentials are received?
2. If your agency has minimum staffing, how do shift differentials impact staffing?
3. If applicable, does the communications/dispatch department have rotating positions within a one shift day?

Bullets example:

Captain*

Over Minimum Staffing:

Step 1 -

Step 2 -

And so on.

Under Minimum Staffing:

Step 1 -

Step 2 -

*Every job title/ rank is detailed. The process may be the same for each rank.



Evaluate Current Staffing Practices

First, take into consideration general staffing practices that apply regardless of the staffing circumstances. For example:

1. What determines when you should initiate the staffing process?
 - a. Is it based on the number of staff on duty?
 - b. Does it depend on the roster going below _____ total staff?
 - c. Do you staff for a vacancy if its duration is less than _____ hours?
2. Does the staffing process change for each job title? If so, which rank is staffed first?
3. Does the staffing process change depending on when the vacancy occurs (e.g., two weeks out, 48 hours out, or less than 24 hours)?
4. Does the staffing process change depending on the type of unit/vehicle/beat involved?

When diagramming multiple staffing procedures, always start with the highest job title and work in reverse order to the lowest job title in the hierarchy.

If the staffing process depends on timing, start diagramming the process for the furthest out vacancies (for the highest job title) and work backwards to diagram emergency (or same-day) staffing procedures (for the lowest job title).

For each staffing diagram, answer the following questions:

1. Where do you get the qualified candidates?
 - a. Should staff from the same, previous, or next shift be included in this list?
 - b. Should on-duty unassigned personnel located in the same unit, station, region, and/or agency be included in this list?
 - c. Should on-duty assigned personnel located in the same unit, station, region, and/or agency be included in this list?
 - d. Should 40-hour (or administrative) staff be included in this list?
 - e. Should off-duty personnel that signed up for OT be included in this list?
 - f. Should off-duty personnel that didn't sign-up for OT work be included in this list?
 - g. Should personnel who reside closest to the vacancy be included in this list (proximity staffing)?

Look for personnel:

- 1) On duty, same Shift, same Region
- 2) On duty, same Shift all other Regions
- 3) Off duty, next Shift, Same Region, Station, Unit, Position

2. Who is qualified to work in this position?



- a. Does a candidate have to have the same job title as the vacant position to qualify?
- b. Can a candidate qualify if they can “act as” the job title of the vacancy?
- c. Does the vacant position require a specialty?

Qualified Personnel:

- 1) Captains
- 2) Personnel who can work as a Captain
- 3) Position does not require a specialty

3. Who is excluded from qualifying for this position?

- a. Should staff working over X hours be excluded (overwork rule)? If yes, how many hours?
- b. Should staff on probation be excluded?
- c. Should staff without their required specialty or with their specialty expired be excluded?
- d. Should staff on vacation, sick, Kelly/shift mask day or other leaves be excluded?

Excluded Personnel:

- 1) Personnel who have worked 48 hours in a 72 hour period
- 2) Personnel on probation
- 3) Personnel who are on an approved leave

4. How do you sort the qualified candidates to find the best fit?

- a. Are certain job titles preferred?
- b. Does seniority in job title matter (based on promotion date)? Prefer the most senior or least senior?
- c. Does seniority in the agency matter (based on hire date)? Prefer the most senior or least senior?
- d. Is the list sorted by total overtime hours/counts? By most or least hours?
- e. Are personnel sorted by last working opportunity? Most or least recent?

Sort the Qualified Personnel by:

- 1) Find ranked Captains first
- 2) Find Acting Captains second

In case 2 or more qualify sort by:

- 1) Most senior in rank (earliest promotion date)
- 2) Earliest hire date



5. What can qualified candidates do with the offer?

- a. How long does a candidate have to accept an offer for overtime? (E.g., one hour, until the morning of, etc...) Is the offer reserved for them exclusively during this time?
- b. Can they turn down the offer? Are they penalized? How?
- c. If you can be penalized for refusing overtime, are there any special days of the year that staff is not penalized? (E.g., Christmas, New Years, Remembrance Day, etc.)

Work offer options:

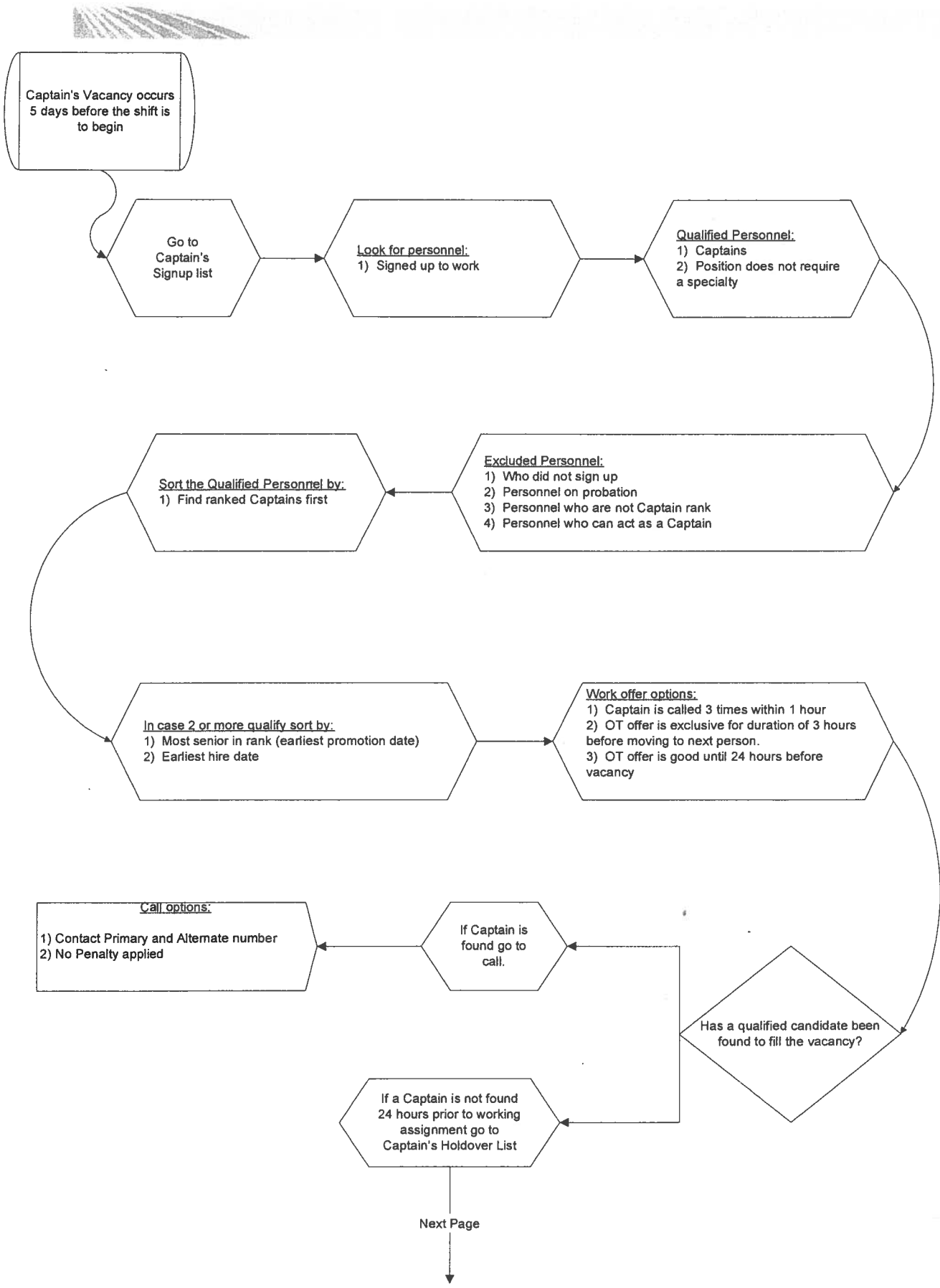
- 1) Captain is called 1 time
- 2) OT offer is exclusive for 5 minutes before moving to next candidate
- 3) If offer is out to multiple Captains, OT is given on a 1st come 1st serve basis

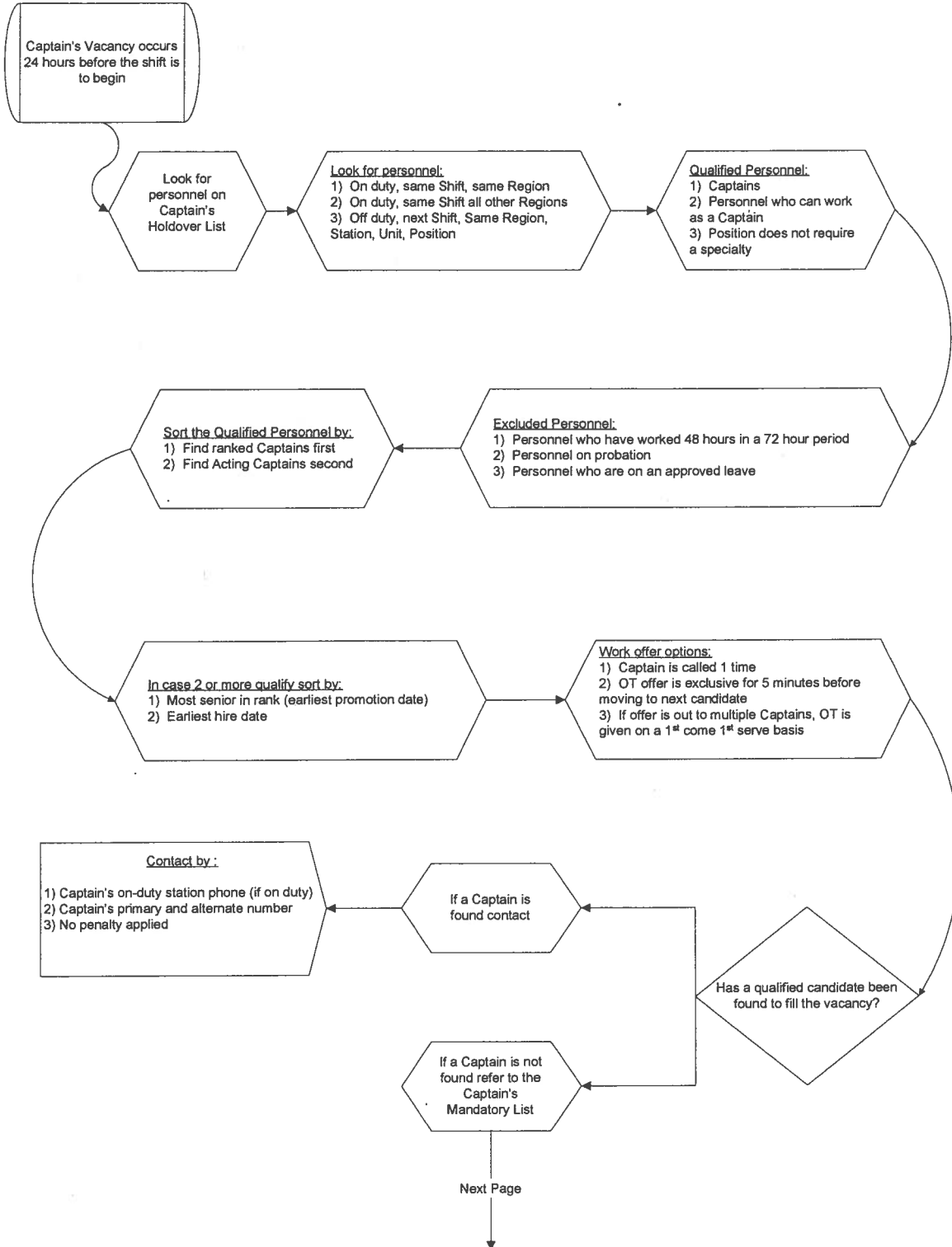
6. How will the qualified candidate be contacted?

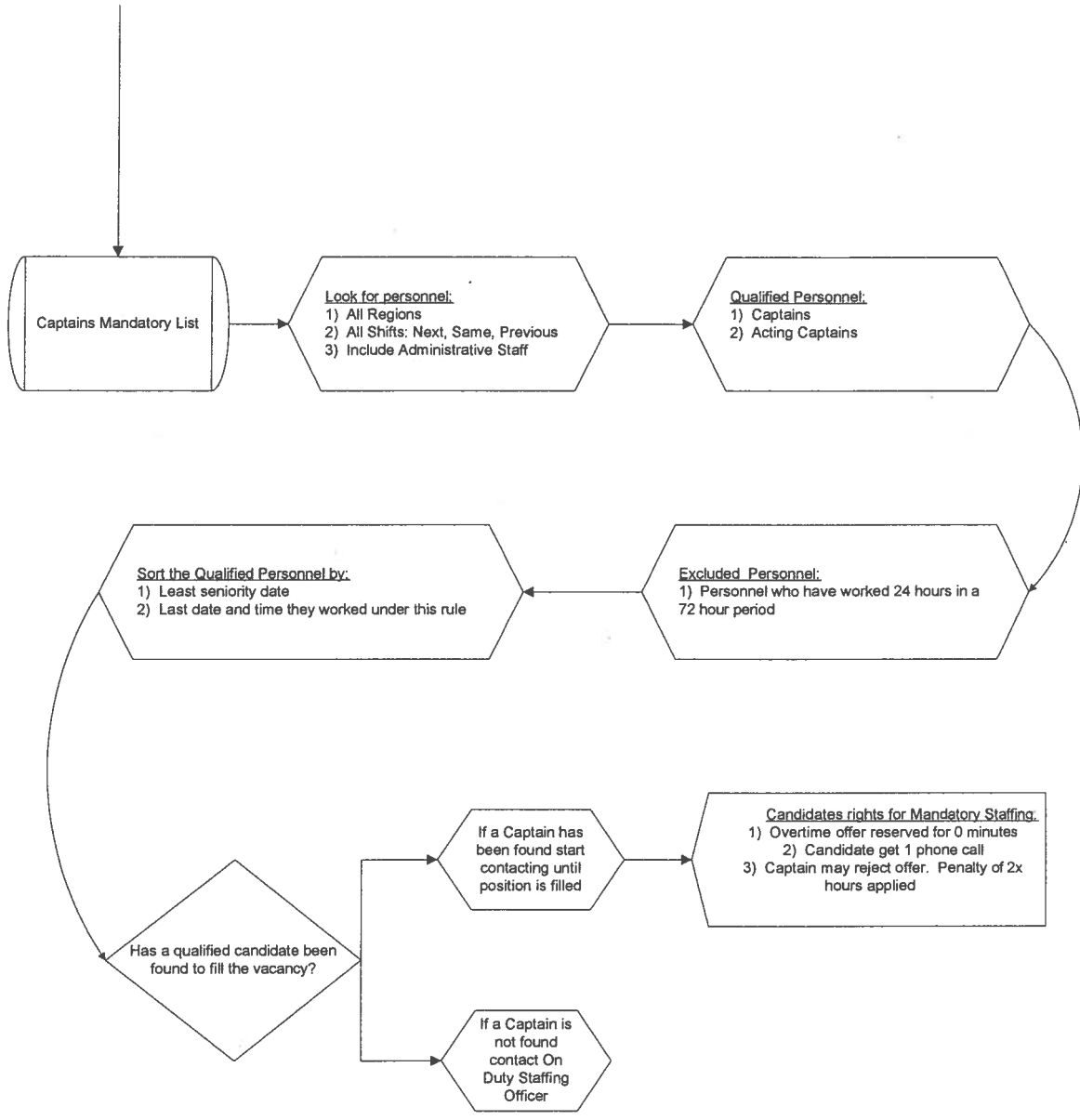
- a. Can the candidate be paged for the offer? Is the offer reserved for them exclusively during this time?

Contact by :

- 1) Captain's on-duty station phone (if on duty)
- 2) Captain's primary and alternate number
- 3) No penalty applied







Payroll Considerations

The questions detailed below are designed to provide information about your current payroll expectations from TeleStaff. TeleStaff will become the main staffing system, so it is important to detail the rules that govern how the payroll codes are applied in staffing scenarios.

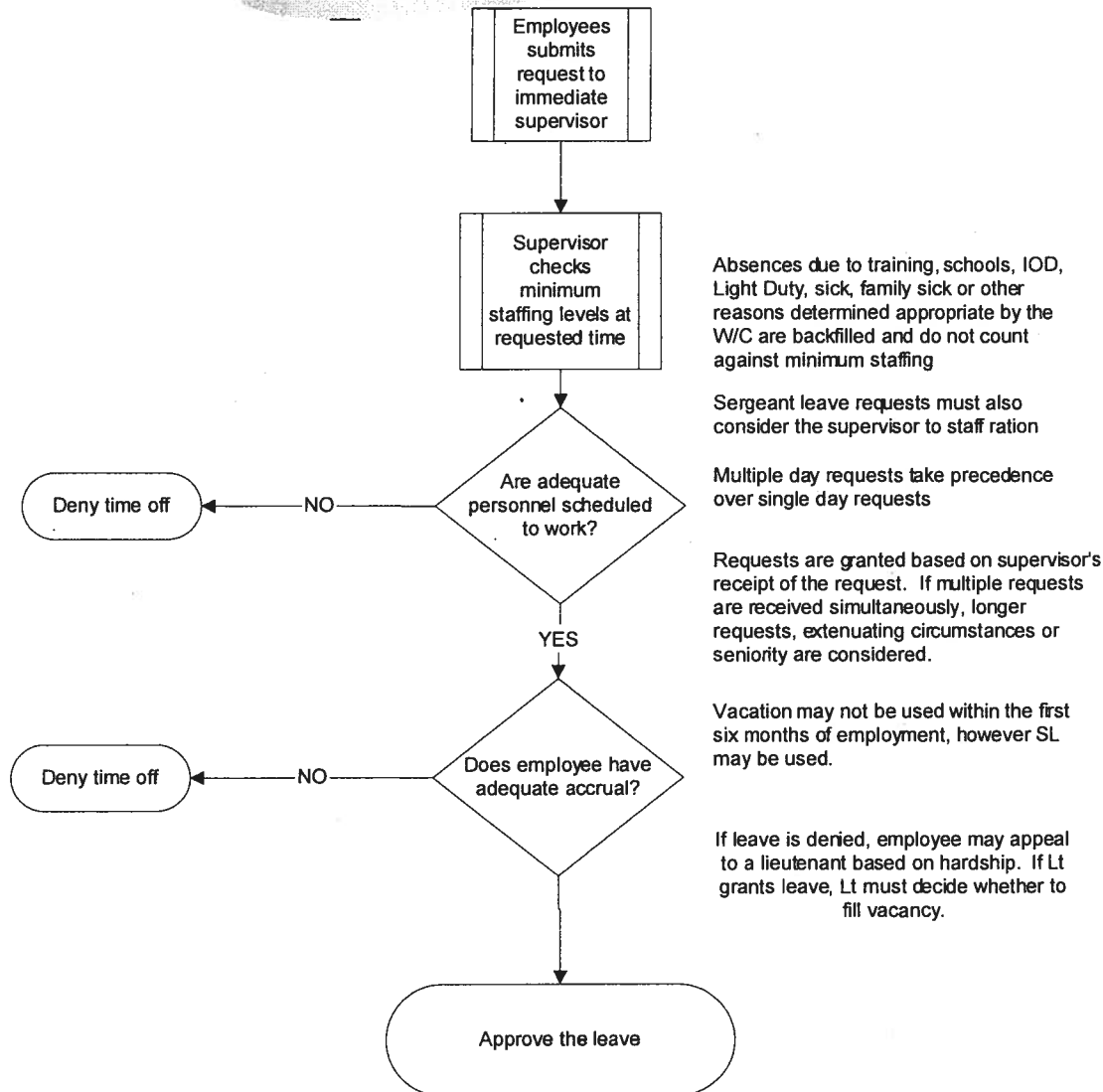
1. Provide a list of work codes.
 - a. For each work code, include a roster abbreviation and a payroll name (e.g., (VA)Vacation).
 - b. The abbreviation (VA) represents the Vacation work code on the TeleStaff roster. When someone is on vacation they can be visually identified on the TeleStaff roster by the work code abbreviation.
 - c. The roster abbreviation code can also be the abbreviation code used by Payroll as an identifier.
2. Determine which work codes, if any, apply towards FLSA.
3. Determine which work codes are excluded from probationary staff.
4. Can people sign up for overtime?
 - a. Can people sign up for full days of overtime?
 - b. Can persons sign up for partial days of overtime?
5. Are there established codes that need to be incorporated into TeleStaff to accommodate signups?
 - a. AFS = Available full shift
 - b. APS = Available partial shift
6. Determine which work codes need to be 'logged' for fairness or to sort a call back list, please provide the details. For example:
 - a. Total hours worked
 - b. Total offers
 - c. Counts
 - d. Last date/time worked
7. Provide a list of work codes that do not require approval from a person with higher authority
8. Provide a list of work codes that require approval from a person with higher authority.

Diagram Payroll Codes

Provide a list of all rules, policies, and procedures for each of the work codes defined above. For instance, what are the parameters that dictate when an employee can take vacation?

Use the below example as a starting point:

Sergeant - Vacation Leave Request



TeleStaff Authority Considerations

Before attending training you should analyze the levels of Authority that are to be associated with each job title. TeleStaff Authority ranges from **Full Access** (access to all areas of TeleStaff) to **Base Access** (login access only). TeleStaff offers many different levels between full and base access, so you will need to determine which areas of TeleStaff will be accessed by the different job titles.

Here are sample questions to get you started:

1. Which job titles are responsible for staffing personnel?
2. Which job titles can approve vacations, leave, etc.?
3. Which job titles can view other people's personal information?

4. Which job titles have access to review departmental reports (such as cost reports)?

Section 4 Pre-Configuration

Based on the information you provide in Section 2, the PM creates a unique TeleStaff database for your organization.

Once this is complete, the PM reviews the database with the customer project team to ensure the organization structure is accurate. The PM also reviews other pre-configuration tasks with the project team to further configure the database in preparation for configuration training.

The information contained in this section should be read by the project team, before the pre-configuration web conferences with the PM.

Database Review Overview

- Setup Organization
- Roster Review

Pre-Configuration Overview

- General
 - Setup Shifts
 - Shift Group
 - Shift Mask
 - Job Title
 - Specialty
 - Group
 - Pay Information
 - Penalty
- Location
- Unit Type
- Back-up Unit
- Setup Special Days
- Special Day Group
- Formula ID
- Setup Codes – Work Codes

Database Review

Setup Organization

Check and verify the organizational hierarchy in TeleStaff.

Agency

1. To review the Organization setup login to TeleStaff (check the **Include Setup (if authorized)** checkbox).
2. Go to **Setup > Organization > Structure**
3. The Organization folder contains subfolders that display the hierarchy of the organization defined in the Import Manager.
4. The first subfolder, *Agency*, contains the name of the organization.

Region

Now verify that all the regions are correct in the Agency.

1. First click on the '+' symbol next to the name of the Agency to display the *Region* subfolder:
2. Confirm that the correct regions are displayed.
3. If a Region is missing right click on the *Region* subfolder, select **New**, and type in the name for the new Region.

Station

Now verify that all the stations are correct in *each* Region.

1. Click the '+' symbol next to the name of one of your Regions to display the *Station* subfolder:
2. All Stations for the selected Region are displayed below the station subfolder.
3. Confirm that the correct stations are displayed.
4. If a Station is missing right click on the *Station* subfolder, select **New**, and type in the name for the new Station.
5. Check the Stations in all the Regions.

Unit

1. Click the '+' symbol next to the name of one of the Stations to display the *Unit* subfolder:
2. Make necessary corrections and/or additions to this area as needed.
3. If a Unit is missing right click on the *Unit* subfolder, select **New**, and type in the name for the new Unit.
4. Check the Units in all the Stations.

Position

1. Click the '+' symbol next to the name of one of the Units to display the *Position* subfolder:
2. Make any necessary corrections and/or additions to this area as needed.
3. If a Position is missing right click on the *Position* subfolder, select **New** and type in the name for the new Position.
4. Check the positions on all the Units.

Roster Review

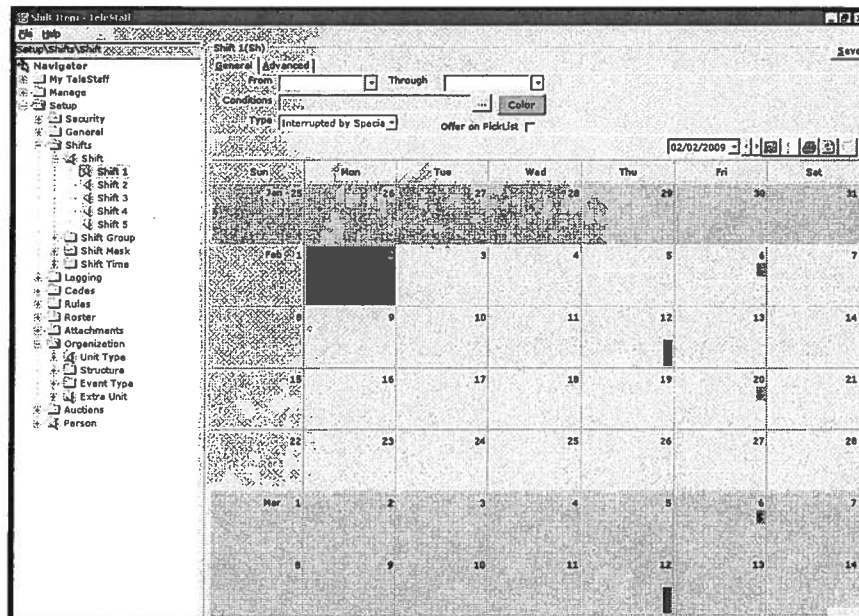
Check the TeleStaff roster for people assigned to the wrong area and make the necessary corrections in the Organization section of the Setup folder.

Pre-configuration

Setup Shifts

Shift Patterns are designed to define the work schedule for groups of people.
Setup the shift patterns for every shift that was created in your TeleStaff database.

1. To set a shift pattern login to TeleStaff and check the **Include Setup (if authorized)** checkbox.
2. Go to **Setup > General > Shift** and select the first shift.
3. By selecting a shift, the calendar for that shift appears in the Main window:

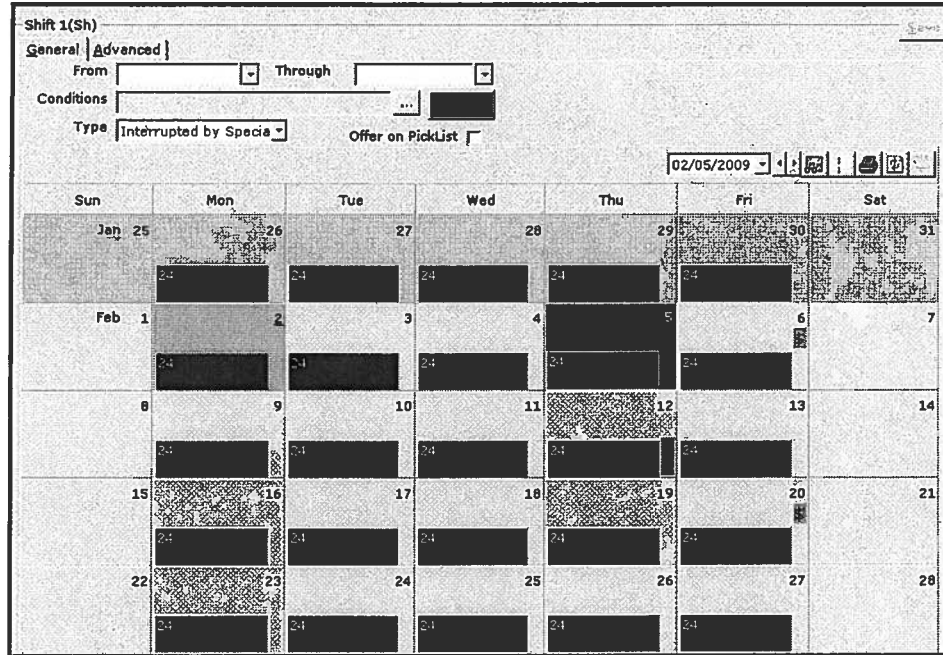


4. Today's date is highlighted and selected.

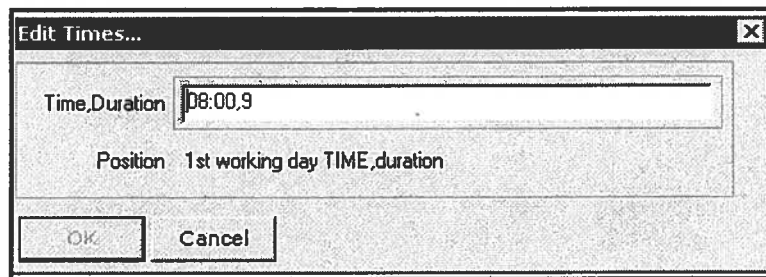
- To define a shift pattern click on the first day the shift works (from today's date). Then hold down the **<Ctrl>** and click the days the shift is active for a minimum of two full shift pattern cycles:

The screenshot shows a software window titled "Shift 1 (Sh)" with a "Save" button in the top right. The window has two tabs: "General" (selected) and "Advanced". In the "General" tab, there are fields for "From" and "Through" with dropdown arrows, a "Conditions" field with a "Color" button, a "Type" dropdown menu set to "Interrupted by Specie", and a checkbox for "Offer on PickList". A date selector shows "02/13/2009" with navigation icons. Below this is a calendar grid with columns for Sun, Mon, Tue, Wed, Thu, Fri, and Sat. The calendar shows dates from Jan 25 to Mar 14. A dark grey shaded area covers the days from Jan 25 to Mar 14, indicating the selected shift pattern. The shaded area includes the entire month of February and the first two weeks of March.

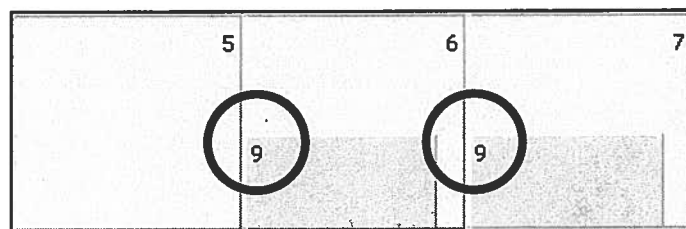
- Right click on any of the highlighted days and select **New Pattern**.
- The New Pattern window appears. Select **Calculate from Selected dates** and press **OK**.
- The shift pattern is now set.



9. Click **Save** located on the top right corner of the window
10. With the new pattern now set, you must now define the time and duration for the shift.
11. Right click on any day of the calendar and select **Edit Times...** The following window appears:



12. Input the start time of the shift followed by the duration of the shift. The format is **1st working day time,DURATION**.
13. When finished press **OK**.
14. You have now set the start time and duration of the shift. The duration of the shift is displayed on the upper left side of each shift box:



15. To select a color representation for the shift, click on the **Color** button located on the upper right hand side of the window to view the color palette.
16. Select a color and push **OK**.
17. Click **Save**.

You have now completed the shift setup process. Please follow the same procedure to update or create the remaining shifts.

Shift Group

Shift Groups are optional in TeleStaff. Their purpose is to combine shifts together into groups. The user's default view when entering the calendar only displays their shift days or duty days. Some people may wish to view the duty days of other shifts. A Shift Group may be setup to group particular shifts together. This Shift Group may then be configured into employee profiles enabling them to see all the duty days of those shifts within the group on his/her calendar. A Shift Group may also be utilized to create rules that target a specific group of shifts rather than just one.

Configure

To create a new shift group:

1. Right click the **Shift Group** folder and left select **New**.
2. A new Shift Group record displays. Enter a name for the shift group and press **[Enter]**.
3. Place a checkmark next to each shift that is to be a part of the new shift group.
4. Click **Save**.

Shift Mask

Masks are created when several staff members have the same start time and duration but the day off cycle changes on an individual or position basis. After creating the Shift Mask, go to each person's **Assignment** window and attach the corresponding Shift Mask. Some agencies may choose to place the Shift Mask at the position level reducing the need to reassign Shift Mask during a bidding process.

Mask 1(M1)

Type: Filter Target

03/06/2007

Sun	Mon	Tue	Wed	Thu	Fri	Sat
Feb 25	26	27	28	Mar 1	2	3
	24	24	24			
4	5	6	7	8	9	10
		24	24			
11	12	13	14	15	16	17
		24	24	24		
18	19	20	21	22	23	24
			24	24		
25	26	27	28	29	30	31
			24	24	24	
Apr 1	2	3	4	5	6	7
				24	24	
8	9	10	11	12	13	14
				24	24	24
15	16	17	18	19	20	21
					24	24

- **Type:** Select whether or not the Kelly day affects on-duty days only or on-duty and off duty days.
 - **Day Off:** Creates a day off for the person (based on the pattern defined) on a day when their shift is working. This selection creates a vacancy on the person's regular assignment. If the List Plan attached to the person's regular assignment has a Mask Code (RDO Non-working work code) on it, then the person remains on the Roster with the work code attached to them on their position with a vacancy created.
 - **Day Off & Extra Day:** Alternates between creating a Day Off (creates a vacancy on the person's assignment) and adding an Extra Day (person is unassigned on the Shift's Roster) based on the pattern created. On the Day Off, the person may remain on the Roster with the work code attached to them on their position (with a vacancy created) depending on the assignment's List Plan.
 - **Extra Day:** Adds the person to the Shift's Roster (unassigned), based on the pattern created, on a day when their shift is not working.
 - **Non-Working:** Removes the person from the Roster completely with no work code. This option creates a vacancy on the position, if the position is assigned to a shift. If the position is not assigned to a shift, then the person is removed from the Roster with no vacancy or work code (the position is gone, too).
 - **Working:** Adds the person to the Shift's Roster (based on the pattern created) in their usual assignment even if the Shift is off.

- **Working and Non-Working:** Alternates between removing the person from the Roster (non working) and adding them to the Roster in their assigned position (working). On a non-working day, there may be a vacancy on the person's position, depending on the position's shift assignment (see non-working above).
- **Filter Target:** This check box is seen throughout TeleStaff and makes objects with this box checked a filterable selection from the people filter tool found in Rules.

Configure

To create a Shift Mask:

1. Right click the **Shift Mask** folder and left select **New**.
2. A new Shift Mask record displays. Enter a name for the Shift Mask and press **[Enter]**.
3. Select every working (on-duty) day and/or non-working day that conflicts with the shift with which this Shift Mask is connected. Two repeating cycles of the pattern must be entered.
4. Right click on any selected day and left select **New Pattern**.
5. The *New Pattern* window appears. Select the **Calculate from selected dates** radio button. This creates the shift pattern desired. Selecting **Clear** from the *New Pattern* window will remove the previous shift pattern.
6. Click **OK** to save the pattern.
7. Click **Save**.

Job Title

A Job Title, or Rank, is the title that a person holds in the organization. For some departments the Rank also designates the position. For example Firefighter is a job title *and* a position. In other departments the job title does not designate the position. For example, the job title is Captain but the position is Seat 1.

In TeleStaff, a job title is assigned a default authority level to allow / disallow access to certain windows or functions of TeleStaff. This authority can be overridden by another authority placed on a person's profile.

The screenshot shows a configuration window titled "Engineer(E)". It contains the following fields and options:

- Authority:** A dropdown menu set to "Engineer".
- Acting Authority:** A dropdown menu set to "Engineer".
- Checkboxes:**
 - Count in minimum
 - Filter Target
 - Roster Headcount
 - Roster Can Act As Headcount
 - Formula ID Headcount
- Level:** A text input field containing "80".
- Equivalent:** A dropdown menu set to "Rank (1)". Below it is a list of job titles with checkboxes:
 - Engineer
 - Administration
 - Aide
 - Battalion Chief
 - Captain
 - FireFighter

- **Authority:** Choose the drop down menu to select this rank's authority. If the authority level required does not appear in the drop down window then go back

to the **Authority** folder in TeleStaff and create the appropriate level of authority for this rank. This authority can be overridden for a person by placing an Overriding Authority Level within their individual Profile.

- **Acting Authority:** Governs what someone "acting" in this specific rank may do and what windows they can access in TeleStaff. This authority level can be overridden from the Person > Profile > General tab.
- **Count in Minimum:** If checked, this rank is considered when calculating the minimum staffing levels.
- **Filter Target:** This check box is seen throughout TeleStaff and makes objects with this box checked a filterable selection from the people filter tool found in Rules.
- **Roster Head Count:** This check box allows this rank to be included in the Roster Head Count matrix. This matrix can be viewable on the Roster (<Full w/HC>) and displays the total number of staff members who hold this rank on the Roster being viewed broken down to an hour by hour basis.
- **Roster Can Act As Head Count:** This displays the total number of staff members who can act as this rank in the Roster Head Count matrix.
- **Formula ID Headcount:** If checked, this rank will be included in the Position Formula ID's *HeadcountInRegion*, *HeadcountInStation* and *HeadcountInUnit* totals. Specific ranks can be targeted to be counted using this option.
- **Level:** A user-defined level that was used in previous versions of TeleStaff. In this version, use Rank Order and Equivalent Ranks instead of this field. Level is a consideration during Rules configurations: it can be used to sort by Rank Level and to target a specific Rank Level.
- **Equivalent:** A list of all other ranks already created; simply check off any other ranks that are equivalent to the rank being configured. Ranks are made equivalent because other areas of TeleStaff will treat these two items as one. For example if a Captain and Lieutenant were made equivalent it might be used for creating a rule that targets and treats Captains and Lieutenants the same.

Configure

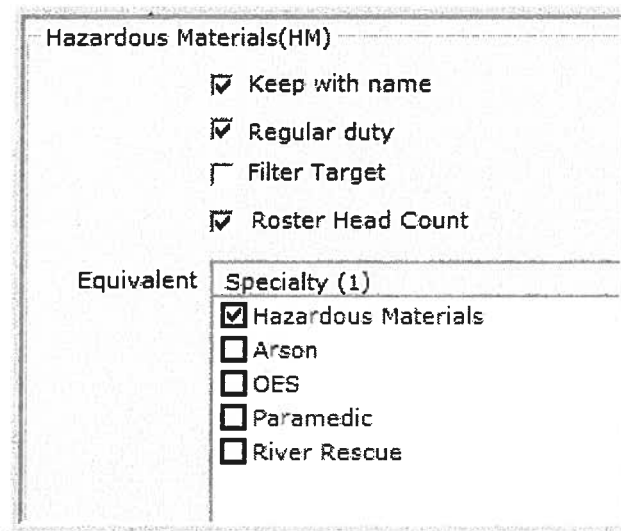
To Create a New Rank:

1. Right click the **Rank** folder and left select **New**.
2. A new rank record displays. Type the name for the new rank and press **[Enter]**.
3. The Rank detail screen displays.
4. Select an **Authority** and **Acting Authority** from the pull down menus provided. If an authority level is not found, return to the *Authority* folder and configure one.
5. Place checkmarks next to any of the desired criteria below the **Acting Authority** pull down menu. In the **Equivalent** area place a checkmark next to any ranks that are considered equal in staffing nature to the rank being configured.
6. Click **Save**.

Specialty

This area of TeleStaff is designed for tracking certifications, also known as specialties. Specialties can be used to exclude staff from working opportunities if they lack a specialty or if a specialty has expired. The expiration date is an optional field located in the staff member's personal profile.

For example, a staff member may be a Firefighter but certified as a paramedic to work on the ambulance.



Hazardous Materials(HM)

- Keep with name
- Regular duty
- Filter Target
- Roster Head Count

Equivalent

Specialty (1)
<input checked="" type="checkbox"/> Hazardous Materials
<input type="checkbox"/> Arson
<input type="checkbox"/> OES
<input type="checkbox"/> Paramedic
<input type="checkbox"/> River Rescue

- **Keep with name:** If checked, the abbreviation for this specialty will appear next to the person who holds this specialty.
- **Regular Duty:** If checked, this specialty can be filtered by the rules. Regular duty specialties can also be used to trigger an alarm via the Static Work code issues. Depending on the severity level of the Issue, candidates may be restricted from Trading with candidates who do not have a regular duty specialty.
- **Filter Target:** This check box is seen throughout TeleStaff and makes objects with this box checked a filterable selection from the people filter tool found in Rules.
- **Roster Head Count:** This check box allows this specialty to be included in the Roster Head Count matrix. This matrix can be viewable on the Roster (<Full w/HC>) and displays the total number of staff members who have this specialty on the Roster being viewed broken down to an hour by hour basis.
- **Equivalent:** A list of all specialties already created; simply check off any other specialties that are equivalent to this specialty. Equivalency is a consideration for staffing. Specialties that are equivalent may be used interchangeably when staffing vacancies on the Roster.

Configure

To Create a New Specialty:

1. Right click the **Specialty** folder and left select **New**.
2. A new specialty record displays. Type the name for the new specialty and press **[Enter]**.
3. The Specialty detail screen displays.

4. Configure the new Specialty by placing checkmarks next to the desired settings. In the **Equivalent** area place a checkmark next to any specialties that are considered equal in staffing nature to the specialty being configured.
5. Click **Save**.

Group

Groups can be used to solve configuration issues or to make the staffers' day-to-day tasks simpler. During configuration, there may be a need to target a group of people to either include or exclude them in a staffing rule.

For example, a "Never Call for OT" group can be created. By placing people who don't want to be called for OT in this group, TeleStaff can exclude them from your overtime call back procedures.

Groups can also be used to indicate special skills (e.g., Spanish speaking, Italian speaking, or photographer).

The screenshot shows a configuration window for a group named "Bilingual Italian(BI)". It has three checked options: "Regular duty", "Filter Target", and "Roster Head Count". Below these is an "Equivalent" section with a table header "Group (1)". The table contains four rows of options: "Bilingual Italian" (checked), "Bilingual French", "Bilingual Korean", and "Bilingual Spanish".

- **Regular Duty:** If checked this Group can be filtered by the rules.
- **Filter Target:** This check box is seen throughout TeleStaff and makes objects with this box checked a filterable selection from the people filter tool found in Rules.
- **Roster Head Count:** This check box allows this Group to be included in the Roster Head Count matrix. This matrix can be viewable on the Roster (<Full w/HC>) and displays the total number of staff members who are in this Group on the Roster being viewed broken down to an hour by hour basis.
- **Equivalent List:** Lists all other Groups already created; simply check off any other Group that is equivalent to this group. Equivalency is a consideration for staffing. Groups that are equivalent may be used interchangeably when staffing vacancies on the Roster.

Configure

To create a new Group:

1. Right click the **Group** folder and left select **New**.
2. A new Group record displays. Type the name for the new group and press **[Enter]**.
3. The Group detail screen displays.

4. Configure the new Group by placing checkmarks next to the desired settings. In the **Equivalent** area place a checkmark next to any groups that are considered equal in staffing nature to the group being configured.
5. Click **Save**.

Pay Information

This is where the organization's payroll and FLSA information is setup. These fields are optional so neither the FLSA nor the payroll information needs to be filled out. If you are planning on utilizing TeleStaff to help with payroll tasks then these fields should be configured. After Pay Information is configured, payroll symbols and/or FLSA symbols appear on the Calendar. Payroll periods and FLSA periods can then be used to run reports.

Pay Info 1	
Pay	
First Ending On	TARGET^(12/31/1989,14days) ...
Second Ending On	...
Pay Object Follows	5 Days After
FLSA	
Ending On	...
Hours Threshold	210
Wage Factor	1.5

- **First Ending On:** This field defines payroll periods utilizing dynamic dates. If the pay period consists of a repeating number of days, for instance a pay period is every 14 days, then only this field needs to be used. If a pay period has paydays that are on the same dates every month for example the 1st and the 15th of every month, then this field will hold the first pay period date, the second field will hold the other pay period date. This field requires a Dynamic Date.
- **Second Ending On:** This field designates the second pay period for payrolls that have more than one payday on the same dates every month. This field also requires a Dynamic Date.
- **Pay Object Follows ___ Days After:** This field identifies the day the payroll symbol should be placed on the calendar, the actual pay day.
- **Ending On:** This field specifies the ending of an FLSA period. This field requires a Dynamic Date.
- **Hours Threshold:** This field contains the number of hours a staff member must have in order to achieve the FLSA threshold.
- **Wage Factor:** This field contains the wage factor that takes effect once a staff member has reached the FLSA threshold.

Configure

To create new Pay Information record:

1. Right click the **Pay Information** folder and left select **New**.

2. A new Pay Information record displays. Type the name for the new Pay Information record and press **[Enter]**.
3. The Pay Information detail screen displays.
4. Configure the new Pay Information record by configuring the desired settings in the fields and areas provided.
5. Click **Save**.

Penalty

Charges are penalties for non-acceptance of an offer. They are applied automatically by TeleStaff or directly by an authorized Staff Member. Automatic charging is accomplished by associating a penalty for non-acceptance of an offer from a particular List.

For example, if a person signs up for overtime and then rejects the offer when called, they are charged hours for rejecting the overtime offer from the "Signup" List. TeleStaff will automatically increment the penalty hours stored within the person's bucket or insert a charge code depending on the configuration settings. Even if the person has not been reached after the defined number of contact attempts, they are charged because they signed up and were not available to respond to the offer before it expired.

Signup Not Accepted	
Severity	A
<input type="checkbox"/> Charge only if valid login	
Bucket	Opportunities
Warnings	0
Count	
Hours	
Offer Count	
Probationary Period	days
Work Code	Overtime 1 time(s)

- **Severity:** A description of the significance of this Penalty.
- **Charge only if valid login:** If this check box is checked then a person will only be charged this penalty if TeleStaff can guarantee that the person was successfully contacted as proven by the entry of their password.
- **Bucket:** These are created and defined during configuration to define the logging methods.
- **Warnings:** This represents the total number of warnings levied prior to enforcing the described penalty below. This is relevant for charges levied as a result of non-acceptance of an opportunity.
- **Count:** This is the count charged for this penalty for Non-Acceptance of an opportunity. This applies to organizations using opportunity count as a fairness criterion.

- **Hours:** This is the amount of hours charged for this penalty for Non-acceptance of an opportunity.
- **Offer Count:** This is the offer count charged for this penalty for Non-Acceptance of an opportunity (add a static count as a penalty charge). This applies to organizations using offers as a fairness criterion.
- **Probationary Period ___ days:** This field is not used normally for penalties but instead to create a Probationary Period. This is the number of days for the Probationary Period.
- **Work Code:** Select a work code from the dropdown menu and use that code as the Penalty that will be assigned to a person by the List for not accepting an offer. This work code will automatically be inserted into the person's history.
- **Time(s):** If a work code is identified, this number becomes a multiplier. This number of times the amount of hours offered will be the charge. For example if a 2 is entered here and I reject an offer for 24 hours of overtime, I will be charged 2 times that amount (48).

Configure

To create a new Penalty:

1. Right click the **Penalty** folder and left select **New**.
2. A new Penalty record displays. Type the name for the new Penalty and press **[Enter]**.
3. The Penalty detail screen displays.
4. Configure the new Penalty record by configuring the desired settings in the fields and areas provided.
5. Click **Save**.

Location

Create as many locations as needed. These locations can be named anything you choose for example city, street corner x, north, south and so on. Each one of these location points may have an assigned departure location. To signify how far away the departure location is from the next location you've created use a value scheme of your choosing. The value can represent time or physical distance.

For example: 1, 10, 20 represent the distance value; the smaller the number value the closer the departure location.

HUNTINGTON BEACH

Departs From

Limit to 'Departs From' Default Value

✓ Location (3/4)	Value
HUNTINGTON BEACH	0
✓ NEWPORT BEACH	2
✓ SANTA ANA	4
✓ TUSTIN	6

- **Departs From:** Select the drop down menu and choose the departure location for this location. This is an optional field.
- **Limit to 'Departs From':** If this box is checked, the selected record's location will only have a "Departs From" location. When a filter is created to pull people from the specified departure location, these people will be included in that list.
- **Default Value:** The value placed here is the default value for all locations that has no distance defined.
- **Location:** Lists all the locations you have created and saved thus far.
- **Value:** The numerical value from the selected record's location to another location. This number is a value that can be used as miles, minutes, etc. The larger the value the greater distance.

Configure

1. To create new Location:
2. Right click the **Location** folder and left select **New**.
3. A new Location record displays. Type the name for the new Location and press **[Enter]**.
4. The Location detail screen displays.
5. Configure the new Location record by configuring the desired settings in the fields and areas provided. This is dependent on the matrix of values developed by the organization.
6. Click **Save**.

Unit Type

In TeleStaff, positions reside within units. Examples of Units are Fire Engines and Ambulances. A Unit Type defines what a unit is and any specialties it requires.

Unit Types are defined in General Setup and are then attached to units.

Engine(E)		
✓	Specialty (0/5)	Qty
	Arson	0
	Hazardous Materials	0
	OES	0
	Paramedic	0
	River Rescue	0

- **Specialty:** This column lists all specialties available for attachment to the Unit Type.
- **Qty:** Represents the total number required of the corresponding specialty.

Configure

To create new Unit Type:

1. Right click the **Unit Type** folder and left select **New**.

2. A new Unit Type record displays. Type the name for the new Unit type and press **[Enter]**.
3. The Unit Type detail screen displays.
4. Configure the new Unit Type record by configuring the desired settings in the fields and areas provided. When the quantity of a specialty is defined, a black checkmark appears next to the Specialty. This provides a visual reference of what specialties the Unit Type is comprised of.
5. Click **Save**.
6. Now go to the **Organization > Structure** folder and navigate to the Unit that the Unit Type will attach to.
7. Select the Unit Type from the **Unit Type** drop down menu to attach it to the Unit.

The screenshot shows a configuration window titled "Engine 1(E1)". It contains several input fields: "Conditions" with a dropdown arrow, "Unit Type" with a dropdown menu showing "Engine", "List Chain" with a dropdown menu showing "1-7 Days Out", and "Phone" with an empty text box.

8. Click **Save**.
9. The newly configured Unit will display a red bell (Staffing Alarm) on the Roster if the specialties fall below what was defined in the Unit Type.

Extra Unit

Extra units have no shifts, positions, or specialties attached to them and exist only to replace the heading of existing vehicles displayed on the Roster. The Copy and Deploy functions utilize the Units defined in this area. If the organization has a need to have their Extra Units configured with special staffing considerations these should be created within the Organization folder of the navigation bar.

Configure

To create new Extra Unit:

1. Right click the **Extra Unit** folder and left select **New**.
2. A new Extra Unit record displays. Type the name for the new Extra Unit and press **[Enter]**.

Setup Special Days

Special days refer to days where different staffing procedures are followed and these days may or may not reflect holidays. If your organization has special days (e.g., Christmas, New Years) you will need to enter those days in TeleStaff.

1. To setup special days, login to TeleStaff (be sure to check the **Include Setup (if authorized)** checkbox).
2. Go to **Setup > General > Special Day:**

3. Create new special day by right clicking on the **Special Day** folder and selecting **New**. Type in the name for a new special day, (e.g., New Years Day).
4. After naming the special day, go to the main window and left select the three dots "... " next to the **When** field.
5. The **Edit DyA** window appears
6. For New Years Day, enter the following DyA formula: **01/01/####** and then click **OK**.
7. Click **Save** in the top right hand side of the main window.
8. Repeat the above procedures for the special days that are unique to your organization.

Below is a list of commonly used Special Days in TeleStaff along with their corresponding DyA formula.

- Christmas Day 12/25/####
- Christmas Eve 12/24/####
- New Year's Day 01/01/####
- New Year's Eve 12/31/####
- Columbus Day [2nd Monday in October] *(10/01/####(0%))MONDAY(2)
- Easter Sunday *(03/21/####(0%)^(01/09/2001 20:25:00,42524MINUTES,1))SUNDAY(1!)@00:00:00
- Independence Day 07/04/####
- Father's Day [third Sunday in June]*(06/01/####(0%))SUNDAY(3)
- Labor Day [first Monday in September] *(09/01/####(0%))MONDAY(1)
- Memorial Day [last Monday in May] *(05/./####(0%))MONDAY
- MLK Day [3rd Mon in Jan] *(01/01/####(0%))MONDAY(3)
- Mother's Day [second Sunday in May] *(05/01/####(0%))SUNDAY(2)
- President's Day [third Monday in February] *(02/01/####(0%))MONDAY(3)
- Thanksgiving Day [fourth Thursday in November] *(11/01/####(0%))THURSDAY(4)
- ****Use Nearest Weekday to move Special Day to either the nearest Monday or Friday if the Holiday occurs on a Weekend.**
*(07/04/####(0%))NEARESTWEEKDAY

Special Day Group

The Special Day Group is created to group special days together. This grouping of Special Days can be used within the rule filters to target a group of special days rather than just one day.

In order for a Special Day to become visible on the Calendar, include it in the Special Day Group "Display on Calendar and Roster".

Configure

1. Select the **Display on Calendar and Roster** item in the **Special Day Group** folder.
2. When selected, this window displays all the special days.
3. Place a checkmark in the corresponding check box to place the Special Day in the **Special Day Group**. If a special day has not been selected here it will not appear on the calendar.
4. Click **Save**.

Formula ID

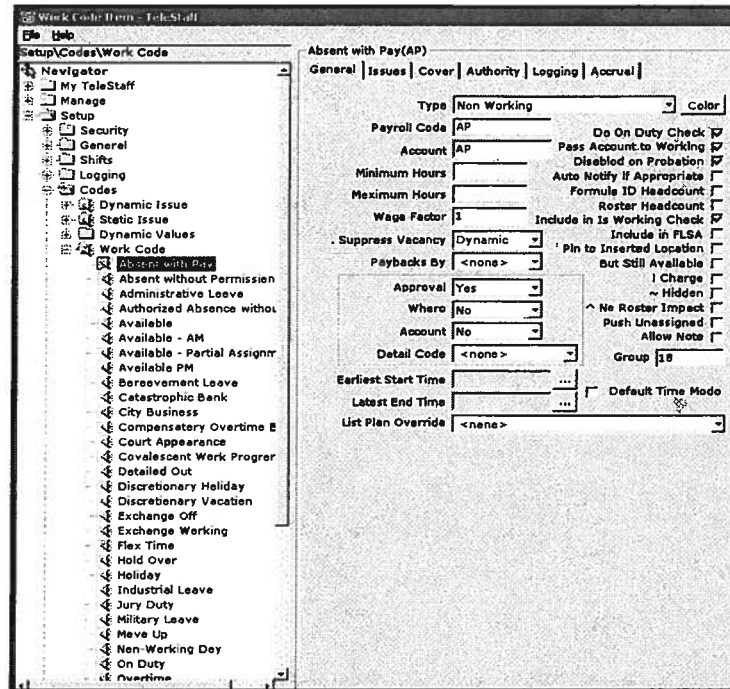
An entire Formula ID is composed of constant text (constants) and variable text (variables). Constant text is text that is displayed exactly as entered (without change), Variable text is specially formatted text that will be converted to new values obtained from the source data (e.g., from Roster records or People records).

A Formula ID can contain variables and constants in any combination. The only limit to a Formula ID is that its result (the text resulting from a solved Formula ID) cannot be more than 1024 characters. This topic will be further discussed during Configuration training.

Setup Codes - Work Code

TeleStaff utilizes work codes to identify the availability status of a person. If TeleStaff will feed a payroll system, the work codes must match those in the payroll system. Enter and setup only the basic information for all work codes into TeleStaff.

1. To setup work codes login to TeleStaff (be sure to check the **Include Setup (if authorized)** checkbox).
2. Go to **Setup > Codes > Work Code**.
3. There are several default work codes displayed in the Work Code folder. These are examples. Edit these examples to reflect your work codes.
4. Select a work code. When a work code is selected, the details associated with the work code are displayed.



5. To rename the work code, right click on the name of the work code and select **Rename**. Type the new name of the work code followed by its abbreviation (with no spaces in between). The format must be **name(abbreviation)**.
6. When you finish renaming the work code, press **Enter**. The name of the work code you created is displayed at the top of the window. There are also six tabs associated with each work code.
7. Select the **General** tab.
8. Select the **Type** pull down menu. There are four available options:
 - a. **Non Working** – This type of work code creates a vacancy on the TeleStaff roster. (e.g., sick leave, vacation, training, etc.)
 - b. **Regular Duty** – This type of work code designates regular pay.
 - c. **Signup** – This type of work code signifies the person’s willingness to work an off-duty day.
 - d. **Working** – This type of work code fills a vacancy on the roster. (e.g., overtime)
9. Select a work code type that describes the work code you created.
10. Enter the abbreviation of the **Payroll Code**. The payroll abbreviation of the work code should match the abbreviation in the Payroll system.
11. Click **Save** located on the top right corner of the window.
12. You have now completed the work code setup process. Follow the same procedure to update the remaining work codes.
13. When you have edited the remaining examples, you can create new work codes by right clicking on the **Work Code** folder and selecting **New**.

Section 5 Hardware and Software Preparation

Before the project team begins their Data Review calls, the IT Lead will need to set up the TeleStaff server on the network and install the TeleStaff Workstation software on the computers for the members of the project team. The information contained in this section will help the IT Lead make the necessary hardware preparations for TeleStaff.

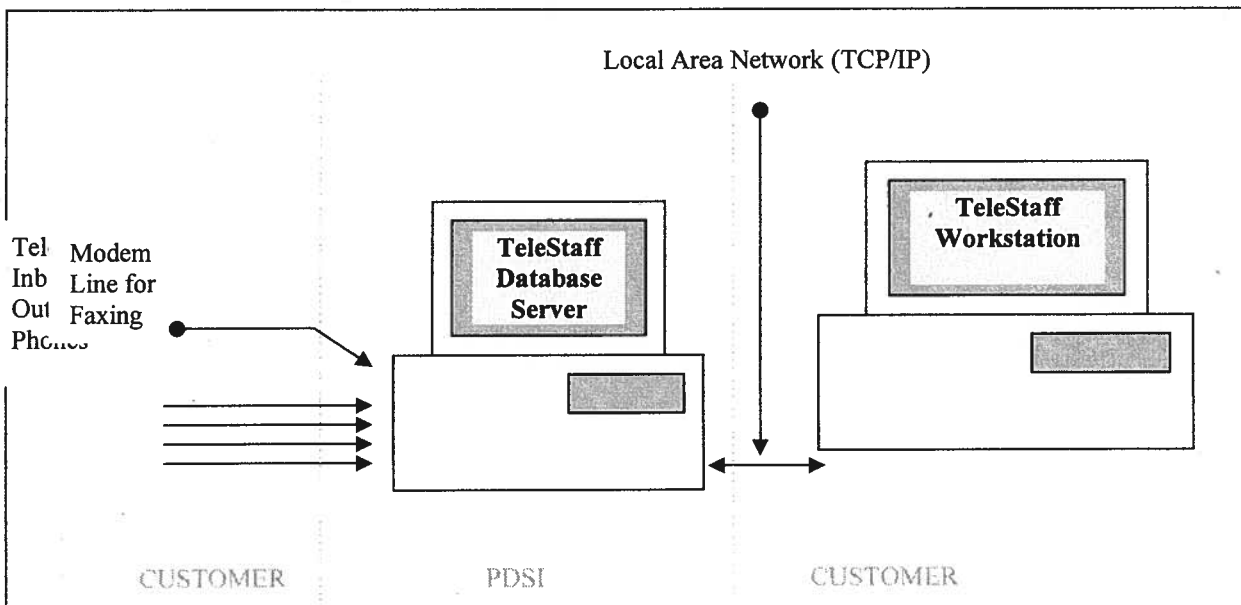
TeleStaff Server Setup and Installation

Please make arrangements with the IT department to install the TeleStaff software and all the necessary required components.

Contact the PDSI TeleStaff Helpdesk at (866) 324-1598 for installation and setup assistance, or enter in a ticket through the Web Portal at <http://support.pdsi-software.com>.

Prior to your appointment, you will need to go to <http://tech.telestaff.com/> and build the installation instructions.

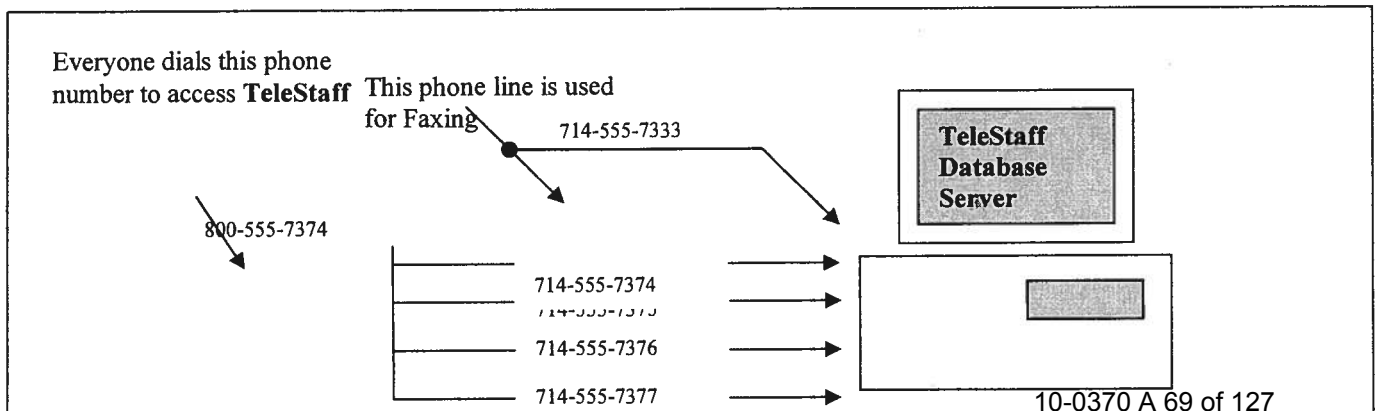
You can also review TeleStaff Conference presentation 107 "TeleStaff Server Setup" located in the Client Area. For your call, you will need to have your registration number and the TeleStaff installation CD on hand.



You will need to establish a Rotary/Hunt Group phone number. A Rotary/Hunt Group is a single phone number that has the ability to ring any one of several other phone numbers. The phone lines that are plugged into the dialogic card should be part of the same Rotary/Hunt Group.

One separate phone line should be plugged into the modem if applicable.

An Example:



Network Environment

The ideal environment for the TeleStaff server and client is a domain on an Ethernet LAN with no firewall between the client and server

For additional information, please contact your Product Specialist.

TeleStaff Workstation Setup and Installation

Along with the setup and installation of the TeleStaff server, arrangements will need to be made to install TeleStaff on all the Workstation computers that are to access the TeleStaff server.

The first step is to install the Workstation software on the project team's computers. This should be completed before the project team prior to the first data review call.

The remaining Workstation computers should be installed with TeleStaff shortly before the department begins end-user training.

Contact the PDSI TeleStaff Helpdesk at (866) 324-1598 for installation and setup assistance or schedule an appointment with your Product Specialist by entering in a ticket through the Web Portal.

TeleStaff Workstation Specifications

- Pentium 4.30 GHz Unit or better
- 1Gig RAM
- 40-80 Gig Hard Drive Space
- CD-ROM/DVD Drive
- Keyboard
- Mouse
- Computer sound card (to hear/record voices in the TeleStaff database)
- Speakers (to hear TeleStaff recordings)
- Microphone (to record voices in the TeleStaff database)
- Monitor
- Network Interface Card
- Windows 2000 or XP

Section 6 Final Steps

The completion of the 5-day TeleStaff configuration training course represents a milestone in implementing TeleStaff for your organization.

Now that training is complete there are several items that must be addressed to ensure a successful implementation. Please review the below topics to learn about what the final steps are in completing the TeleStaff implementation Process.

Step 1 Install the configured database on the TeleStaff server

At the completion of configuration training, install the TeleStaff database onto the designated TeleStaff server on your network.

Most organizations require the cooperation and assistance of the IT department, so make these arrangements as soon as possible to allow the IT experts to complete this task.

Step 2 Complete the configuration training tasks

Once the configured TeleStaff database is on the server, the project team should immediately start working on TeleStaff.

Do not put TeleStaff to the side and work on it at a later date! Retention will be lost if the project team is not given the time to work on TeleStaff during the follow-up week.

The first step the project team should take is to complete any configuration that was not completed during the initial class. This will be done with the help of the PM via a web conference.

In addition, the team should work on:

Standard Operating Procedures document (SOP)

During Configuration, the PM discusses your staffing procedures, and how to create your SOP. It is critical to document the post-TeleStaff operating procedures, detailing all steps of the process. These documents will reflect the processes that you outlined in your staffing processes, and will help you define your testing scenarios and training. It is critical to not skip this step.

Staffing scenarios

Staffing scenarios help the project team test the configuration of TeleStaff. These scenarios should mimic frequent and non-frequent staffing activities. Allow the project team between two to three weeks to completely test and solidify the configuration.

Please refer to the **TeleStaff Configuration Handbook** for details of the proper procedures for testing your TeleStaff configuration. Also, sample test scripts for testing scenarios are available from the PM.

Voice recordings

Ensure that all voice recordings have been made. Test the inbound and outbound phones to determine if the voice recordings are heard clearly. If not, recordings may need to be re-recorded.

Step 3 Develop a Training Plan

Preparation is the key to success! Develop an end-user training rollout plan during the time the project team is configuring and testing TeleStaff. Start out by asking the following questions:

1. Who should be trained first?
 - a. PDSI recommends training the staffing administrators and higher end-users first. These are the individuals that require the most training, as they will utilize advanced TeleStaff functions and procedures.

- b. PDSI suggests four to six hours of training per staffing administrator.

14. Who should be trained last?

- a. PDSI recommends training the end-users after the advanced users. The end-users are personnel who have limited access to TeleStaff and who will mainly be using TeleStaff for personal scheduling purposes.
- b. Training will go quickly as PDSI recommends one to two hours of hands on training per end user.

15. Where will training take place?

- a. Where the training will take place is important in developing a TeleStaff training rollout plan.
- b. Training can be conducted in a classroom setting with training workstations or in several locations where there is a TeleStaff Workstation available.

16. What is needed to set up a classroom environment?

- a. A classroom setting is an ideal environment because it encourages learning and interaction. When an individual is taken out of an everyday working environment and placed in a controlled, interruption-free environment they are encouraged to focus on TeleStaff.
- b. Set up the training room with stand-alone training workstations, one per end-user. The workstations should be setup with a copy of the production database to allow users to practice with "real" data.
- c. Please get instructions on how to set up training workstations (clients) from <http://tech.telestaff.com>. If you encounter problems with the installation, enter a ticket via the Customer Web Portal.
- d. Have a telephone with a speakerphone available in the training room so that the trainer can demonstrate the TeleStaff telephone features by calling into the TeleStaff server.
- e. If the dialogic boards are not set up and configured in the TeleStaff DB server, the trainer can demonstrate how to interact with TeleStaff using simphones.

17. What is needed for a remote training environment?

- a. Another option is to train users at several locations using TeleStaff Workstation machines.
- b. The Trainer travels to the trainees and conducts training using workstation machines that are connected to the TeleStaff server, which houses the training database.
- c. This method of training is practical when it is difficult to schedule the trainees in a classroom environment.

- d. The downside is that training can be interrupted and oftentimes there are not enough workstations available for each person during the training session.
- e. The TeleStaff Workstation software must be installed at all training locations. If several individuals are present for training in one sitting, it is ideal to have a Workstation available for each person.

18. What database is used for training purposes?

- a. Conduct training off of a copy of the live production database.
- b. By training off of a copy, the trainers and trainees are free to explore TeleStaff without worry. Trainers have the freedom to use staffing scenarios and test data for examples.
- c. Once training is complete, the training database(s) can be deleted.

19. What department resources are needed to rollout training?

- a. IT resources are needed for setting up the training room or installing TeleStaff on the computers used to access the TeleStaff server. If training is conducted in a central location the training computers need to be installed with TeleStaff training software.
- b. Clerical resources are often utilized to organize, edit, and print all training manuals, sample TeleStaff reports, and handouts for training.
- c. Administrative resources are usually needed to reserve the training room(s), set time schedules of training start and end times, and manage individual schedules for personnel to attend training.

The answers to the above questions will give you an idea of how much time is needed to rollout training. After answering these questions you can put together a timeline of how long it will take to rollout training. At this point you will know how many individuals need to be trained, when they will be trained, and where.

End-User Training

Estimated classroom training time for using the basic features within the My TeleStaff area of TeleStaff (main area that end-users utilize) is approximately 2-3 hours.

All users of the system (including end-users, staffers, and administrators) will attend this training.

Recommended maximum number of people per classroom is 20.

Using My TeleStaff (All Users)
Login-in/logout procedures
Navigator overview
Personal Calendar Management – tool tips, symbols, views, navigation, adding leave codes, adding sign-up requests, trades, access roster, access pick lists
Personal Information Management – understanding general, profiles, assignments, messages, paybacks, penalty, and logged tabs
Personal reporting – overview of types of reports (accruals, audit, contact log, costs, exceptions, expirations, payback, payroll, personal history, roster, summary)
Introduction to TeleStaff Roster – views, creating vacancies, shifts
Interacting with TeleStaff through the Telephone
(Optional) Web access module Training
Total Training Time = 2-3 hours

Administrator and Staffer Training

In addition to the general end-user training above, Staffers and Administrators will require additional training on the advanced administrative features of TeleStaff (located in the Manage and Set-up folders).

Estimated classroom training time for utilizing advanced features of TeleStaff is approximately 6-7 hours.

Recommended maximum number of people per classroom is 20.

Managing TeleStaff (Admin/Staffers)
Roster – customize roster views, edit and manage vacancies, staff vacancies using fill by rules and fill by person windows, edit and manage vacancies, switch staff assignments, off-roster staff, copy and deploy units, deploy events, manage staff information, initiate automated staffing, access and review contact logs, finalize and fix a roster
Advanced Calendar – open and navigate, analyze work exceptions, approve requests, review work trends of persons, off-roster members from Calendar
People - Navigate and customize people window; edit staff information; create and manage profiles, assignments, messages, paybacks, penalties, work history, and bucket changes
Reports – produce department-wide reports, individualize a report, and analyze report details, export reports.
Using Advanced Filters
Assigning Attachments
Outbound calling
Administrative Management – adding/removing persons
(Optional) Web access module training
Total Time = 6-7 hours

Step 4 *Develop a timeline for testing and cutover*

Project timeframes are critical in implementing TeleStaff. Set dates for when to start training, when to start Parallel, and when to go into production with TeleStaff. These dates will keep the project team on track. The important thing to remember is to allow the project team enough time to complete the tasks ahead.

Training start date

When setting a training date, take into account the amount of time needed to complete the TeleStaff database. This includes configuration and testing. Keep in mind the amount of time needed to reserve the resources necessary to rollout training. These resources include:

- IT personnel for the installation and setup of the training workstations
- Administrative personnel for printing out all training manuals and documents
- Training personnel who will conduct the training for the department.

Parallel start date

A Parallel start date is a milestone for the project team. Parallel begins when the staffing administrators use TeleStaff *in conjunction* with the department's current staffing system.

Parallel is the first step in helping the department changeover from the current staffing system to TeleStaff. PDSI recommends a parallel testing period that is no longer than two pay periods.

This step that may be omitted from the final implementation plan, if the department implements new staffing rules and does not need to parallel two systems.

Cutover date

The cutover date is the most important date. This is the day that the department *exclusively* staffs with TeleStaff and the department is dependent on TeleStaff for everyday staffing. This does NOT imply that the department is utilizing ALL of the TeleStaff features.

The Cutover Date is usually between two and four weeks after the parallel start date. Keep in mind that more or less time may be needed depending on the size of your organization. For instance, larger departments need more time for training and Parallel.

Step 5 Develop training materials

When developing training materials for the end-users, start by analyzing what the users need to know about TeleStaff. Presenting too much information to the end-users may be overwhelming; however, if the training does not include enough information about TeleStaff, there may be doubts and concerns of how it will work in the organization.

Listed below are fundamental topics that should be covered when training on TeleStaff:

- Review how to login to TeleStaff using a TeleStaff Workstation machine, the Telephone and/or Web access module.
- Explain the available folders and their contents in the TeleStaff Navigator window.
- Include a review of the TeleStaff Help screens.
- Demonstrate the selecting capabilities on the personal calendar. Give examples on how to request time off, sign up for work, and perform shift trades with other employees.
- Review the person information window. Review how to change a password and the contact phone numbers.
- Design the training materials to represent practical usage of TeleStaff. Make handouts of Reports and Work Codes for the staff to review.
- Review how to call TeleStaff over the telephone. Allow the class to listen to TeleStaff as it responds while entering various exceptions or signup codes.
- Create laminated cards of the work codes that people need to utilize when working with TeleStaff.

Review the end-user and staffer training manuals in the Customer Support documents area at www.telestaff.com for guidance in creating custom training materials

Step 6 Prepare the trainers

Keep in mind that TeleStaff will be a new concept to the organization. It is important that when the trainers introduce TeleStaff to the end-users, they follow a simple but well organized format. If the format is complex, the end-users will be distracted trying to keep up with the training instead of absorbing what they need to learn. A simple and well organized training format will ensure the end-users learn what they need to know about TeleStaff. Listed below are a few ideas on how to prepare the trainers for TeleStaff training:

Define the goals of the training class

- Explain the purpose for TeleStaff training.
- Start by giving a general overview of TeleStaff.
- The trainers should focus on how the department and the employees will benefit from using TeleStaff.

Show confidence in TeleStaff

- The trainers should present TeleStaff with confidence and understanding. To do this the trainers must be given the time to learn TeleStaff.
- The trainers should understand all the concepts behind TeleStaff and feel comfortable enough to present them to others.
- When the trainer is confident in TeleStaff, the trainees will be as well.

Answer questions directly

- Direct questions deserve direct answers.
- The trainer should expect questions ranging from simple TeleStaff functions to questions concerning how the staffing rules are configured in TeleStaff. The trainer should be prepared to answer these questions with direct answers.
- If a question cannot be answered at that time, the trainer should write down the question (in the presence of the trainee) and ensure them that an answer will be sought.

Repeat questions aloud

- Questions are a great training aide.
- Repeat the question aloud so the whole class can hear.
- Most likely there are other individuals who might be thinking the same question.

Devise staffing scenarios that are applicable to the target audience

- Have the trainers use examples that pertain to the subject material.

- Examples should be simple, realistic, and informative. Do not use complex examples as they can frustrate the trainees.
- Keep the examples simple and the trainees are more apt to understand them AND they are more likely to ask follow up questions.

Explain how the user benefits from TeleStaff

- This is applicable to everyone in the department.
- Explain how TeleStaff will help them in managing their work schedule.

Provide a contact name and number for help

- Hand out a department contact name and number for users to call in case they need help.
- This information will help the users feel more comfortable knowing that they have someone to call if they have any questions.

Step 7 Parallel

Parallel testing exists to ensure that the new system will work as planned. It will also help with the changeover of staffing systems. During this period, the staffing personnel work with both the current staffing system and TeleStaff. The parallel period should be long enough to validate the new staffing system, but short enough that the staffers are not overly burdened. When the parallel period goes on indefinitely (or longer than necessary), staffing mistakes increase, system acceptance drops due to double-entry, and the probability for burn out increases.

In an effective parallel environment, the staffing personnel create the daily rosters and fill vacancies using the current staffing system and TeleStaff. The results should be the same. TeleStaff should recommend the same personnel for the vacancies as the current system. If TeleStaff does not, determine why. Is it due to TeleStaff not pulling the right person? Or was there a mistake made using the other system? If it is TeleStaff, report the issue to the project team so that a change can be made to the TeleStaff configuration.

Parallel testing follows closely on the heels of administrator training. The project team should start parallel shortly after training ends for the staffing administrators and advanced end users.

In rare cases, some organizations opt to skip the parallel phase and start staffing exclusively with TeleStaff. There are reasons why this may be a valid scenario:

- There may not be a reliable staffing system in use currently
- The department may have implemented dramatically new staffing rules and procedures in TeleStaff; thus making parallel an unnecessary step.

Step 8 Cutover

Keep the Project Manager up to date by supplying them with the final training, parallel, and live dates.

After a successful parallel period, it is time to start staffing with TeleStaff exclusively in a production environment.

Deployment Guide

Introduction

Welcome to the TeleStaff Deployment Guide. This guide is a reference for the TeleStaff project team. There are no copyright restrictions on this document.

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Section 1 Getting Started

Introduction

Congratulations on the purchase of TeleStaff!

A PDSI Project Manager (PM) will work with the TeleStaff Project Team to successfully implement TeleStaff in your department.

By the time you receive this packet, the **Introduction Call** between the Project Sponsor and the PDSI PM will have occurred. The purpose of the call was to discuss project scope and expectations, purchase justification, resource allocation, and roles and responsibilities.

The next step in implementing TeleStaff is to develop and finalize the Deployment Project Plan, which will be reviewed during the Project Plan Call. The **Project Kick-off Meeting** between the entire Project Team and the PDSI PM can occur as soon as the project plan is finalized.

The information presented in Section 1 and 2 of this guide will be reviewed during the Project Kick-Off Meeting.



Preparing for Project Kick-Off

Please make arrangements for the Project Team members to have copies of this document and to read Section 1 and 2 of it **BEFORE** the Kick-Off Meeting.

Roles and Responsibilities

Forming the right Project Team is a critical first step to ensure the success of a TeleStaff implementation. The TeleStaff Implementation Project Team will comprise key people from the customer organization and from PDSI. The team members will work together to guide the project to completion.

Project Sponsor

The TeleStaff Project Sponsor is ultimately responsible for the success of the project. It is critical that the Sponsor remains involved at a high-level for the duration of the project.

The sponsor is:

- The highest-level business executive who supports and mandates the implementation of TeleStaff
- A champion for TeleStaff who creates an environment conducive to change through on-going communication with the Project Team and the user community

The Sponsor is the project representative who:

- Selects the Project Lead and ensures that this is a dedicated resource for the duration of the project
- Selects the Project Team and assigns resources as needed for the duration of the project
- Assigns resources to ensure on-going administration and maintenance of TeleStaff once the implementation project is completed
- Has high-level decision-making authority
- Acts as the escalation path for issues, concerns, or questions from the PM, Project Lead, Project Team, and user community
- Implements Change Management

Project Lead

The Project Lead role can be handled by one person (with a back-up) or two people with representation from IT and business/operations.

The Project Lead:

- Ensures accountability for on-time deliverables as per the project plan
- Owns the daily project management task and is responsible for managing the project and keeping it on track
- Coordinates the project team and ensures tasks are completed on time
- Allocates resources to the project team per the project plan (subject matter experts)
- Works closely with the PM – daily or weekly as required per project phase
- Escalates to the sponsor on a timely basis, when necessary
- Attends configuration training

Project Lead qualifications:

- Confident leader with support of the users and the rest of the project team

- Decision-maker with authority to make decisions
- Positive “can-do” attitude
- Business knowledge is high and staffing knowledge is excellent
- Dedicated to the project, if possible. If not, then other tasks should be reduced.
- Must stay on the project for the duration. Should not be subject to transfer or retirement for the entire project duration)
- Dedicated, organized, and conscientious of timeframes
- Accessible to project team during regular business hours
- Computer literate

PDSI Project Manager (PM)

The PM’s role is to support the entire project team throughout the implementation process and guide the project to a timely and successful resolution.

The PM:

- Provides project management support
- Schedules status meetings
- Provides expertise on data collection, configuration, and application set-up
- Owns and manages the project plan and updates it to reflect an accurate schedule
- Communicates project plan updates to the project team
- Provides expert advice and support on all matters pertaining to data collection
- Creates initial TeleStaff database
- Leads the database review and database configuration training classes.
- Prepares the project team to successfully cutover to TeleStaff

Other Project Team Members

Customer

- Staffing expert representation – Subject Matter Expert(s)
- Payroll representation – Subject Matter Expert(s)
- IT representation – Subject Matter Expert(s)
- Union representation (if applicable) – Subject Matter Expert(s)

PDSI Team Members

PDSI also provides the following resources to support the implementation project:

Product Specialist (Help Desk)

- Provides technical support for all hardware/networking related issues, as well as technical product issues
- Supports the customer after successful completion of configuration training.

Want



to ensure a successful implementation?
Allocate the right resources!

PDSI's experience with over 550 customer implementations proves that a critical factor in ensuring a successful TeleStaff implementation is the appropriate allocation of resources by the customer.

The customers who completed the implementation project in a timely manner selected Project Team Leads with sufficient time available to lead the project, who possess excellent staffing knowledge for the entire agency, support the implementation of TeleStaff, and have decision-making authority.

Successful customers also considered a contingency plan for the Project Lead. If the Project Lead is injured, falls ill, or is unexpectedly transferred, etc. before the project ends, there must exist a back-up lead who has knowledge of TeleStaff and the implementation process, has been involved with the project from the Kick-off Call, and who can carry the project to its successful conclusion.

In addition, the customer must also ensure the availability of various SMEs with the requisite expertise during various stages of the project. The SMEs need to be made available to conduct tasks at critical times during the project.

Implementation Project Risks

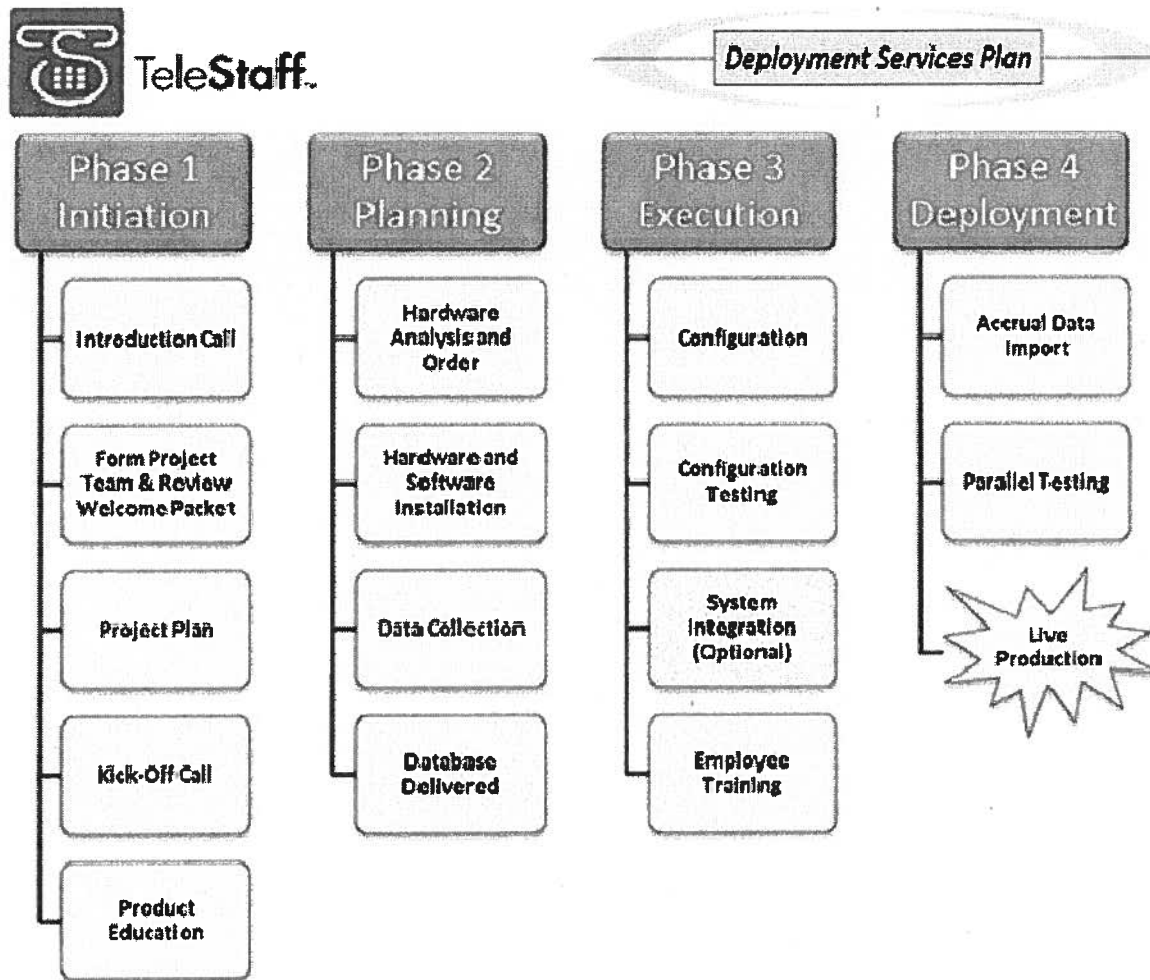
There are many factors that increase the risk of project failure. These common implementation hurdles must be managed throughout the implementation process:

20. Unrealistic expectations of TeleStaff
21. Project Lead goes on extended leave, is not available to the project team, and/or does not have the hours available to lead the project
22. Insufficient resources allocated during the data collection, testing, and training phases
23. Miscommunication between management, union, and IT
24. Delays in training end-users.

TeleStaff Deployment Process

Following is a summary of the recommended approach to the TeleStaff deployment process that is based on PDSI's experience with implementing TeleStaff successfully. Because of the highly configurable nature of TeleStaff, there may be changes to the process described below for a particular implementation project.

The implementation project has four major phases: Initiation, Planning, Execution, and Deployment.



Phase 1 - Initiation Phase

Introduction Call

The **Introduction Call** is the initial meeting to ensure appropriate resources are assigned to the Implementation Project team and the scope of the project is accurately defined.



Single or multiple databases?

- When there are multiple agencies with distinct rules, each agency requires a separate configuration.
- If there is true sharing of resources (i.e. there is cross-over between departments on a consistent basis, or mandatory over-time across all groups, and positions can be filled from any group), a single database is recommended.
- If there is not true resource sharing amongst departments, and simply bulk cross-over a few times per year (for example) then multiple databases (where there are multiple agencies) are recommended.

Welcome Packet & Deployment Guide

The Project Lead receives these documents from the PM and distributes the contents as necessary to the team members.

The Project Lead distributes the Deployment Guide to the project team members that will attend the Kick-off Call. Sections one and two should be read by all team members prior to the call.

Project Plan Call

The PM, Sponsor, and Project Lead refine the Project Plan. The Project Plan details the specific tasks with due dates, predecessors, and owner. The plan also details the customer and PDSI deliverables, milestones, and status information.

Kick-off Call

After the Project Plan is finalized, the entire team participates in a **Kick-Off Call** to review the following key components of the project:

- Introduction of project team members
- Review project cost justification and objectives
- Review team roles and responsibilities
- Overview of the Deployment process phases and general time line
- Review items needed for data collection call



Project Kickoff Action Items

- Provide PM with sample rosters and organization charts
- Project Team reads the End-User Tutorial Guide and watches the End User Training video, which can be downloaded from: www.telestaff.com

Phase 2 - Planning Phase

Hardware Planning

Shortly after the Kick-off call, the PM and the IT Lead review the hardware specifications related to the TeleStaff server, phone lines, telephony components, and Web access module (if applicable). Appropriate hardware and software is ordered.

Hardware Setup

The IT Lead works with the PDSI Help Desk to set up the TeleStaff server and install the dialogic board and dongle. Phone lines are also installed at this time.

Finally, the web access module and the TeleStaff components (Line Manager, Task Manager, and Contact Manager) are installed with the assistance of the Help Desk.

Data Collection Call

After the Kick-off call is completed, the PM and the core Project Team will schedule a call to review the data collection process and documentation. The agenda for this meeting will include:

- Instructions on how to collect, organize, and format pertinent personnel and organizational data for the creation of the TeleStaff database (Refer to Section 2 of this Guide for details)
- Review the organizational structure and makes recommendations as to how it can be represented in TeleStaff

Immediately after the Data Collection call, the Project Team will:

- Gather personnel and departmental data and complete the Microsoft Excel spreadsheet.
- Send the spreadsheet to the PM
- Make changes to spreadsheet per recommendations of the PM

After the data spreadsheet is finalized, the PM creates the TeleStaff database.

Team Preparation

After the data collection process, the Project Team reviews the training videos, training guides, and the configuration manual to fully prepare for configuration training and ensure that the team is comfortable with TeleStaff terminology and functionality.



Understanding Basic Terminology

It is very important that the team members who will attend configuration training understand basic TeleStaff functionality and terminology.

Every member of the project team must read the **End-User Manual** (available for download from www.TeleStaff.com in the **Customer Support Area**) and watch the corresponding **TeleStaff Training Concepts videos**.

Included in your Welcome Packet is a **PDSI Resource Guide**, which includes the login and password for the Customer Support area and instructions on how to download this presentation. You can make as many copies of the above documentation as needed.

Database Review

In the **Database Review Call**, the PM reviews the initial database (via Web Conference) with the CORE Team.

- The PM makes recommendations to the project team as to how to modify the database to more accurately reflect the organizational structure, if necessary.
- The project team spends time re-working the database, if necessary.
- This process of modification and review under the guidance of the PM continues until the database is ready.



Is your team ready for deployment configuration training?

Each member of the Deployment Configuration training team must reply “yes” to each of the following questions before attending configuration training at PDSI.

PDSI may reschedule configuration training if the team is not adequately prepared:

8. Have you reviewed the TeleStaff End-User Manual?
9. Have you reviewed the TeleStaff Concepts Training CD?
10. Have you reviewed the TeleStaff Advanced Concepts training manual?
11. Have you read the TeleStaff Configuration Training Manual?
12. (All above documentation is available for download from www.TeleStaff.com)
13. Have you completed the database review?



Is your environment ready for configuration training?

PDSI will ship TeleStaff hardware (dialogic telephony card and dongle) to the Project Lead or the IT Lead along with the necessary installation documentation.

Prior to Database review, the IT Lead should have the TeleStaff server, software, and the web access module, installed and functional. We recommend that the lead schedule an appointment with the PDSI Help Desk for installation assistance.

Review Section 5 of this guide. To build installation documentation, visit <http://tech.telestaff.com>

Phase 3 - Execution Phase

Deployment Configuration Training

These Deployment Configuration Training classes are critical to the success of the project; therefore, it is important for the configuration training team to prepare as fully as possible.

In the weeks prior to configuration training, the Project Lead should ensure that every member of the configuration training team is involved in the data collection and data review process.

The configuration training team is responsible for bringing to the department the knowledge they receive during the configuration training calls and for leading the testing of the system and the training of the end-users. This is a huge responsibility and it is imperative that the right people are assigned to this team.

It is also important for each person on the configuration training team to be completely familiar with TeleStaff (basic functionality and terminology) and the implementation process *before* the configuration class begins.



Who Should Attend Configuration Training?

The Project Lead/Project Sponsor assigns a maximum of 4 people to the configuration training team:

- **Project Lead – Mandatory**
- **Business Rules/Staffing Experts – Mandatory**
- **Up to 2 other Subject Matter Experts (including Payroll, RMS/CAD, and IT representation)**

Is it mandatory for IT to attend training?

No, it is not necessary for IT to attend. Deployment configuration training is focused on setting up TeleStaff to reflect the organization's structure and work codes. IT staff will work with the PDSI Help Desk to configure hardware, install software, test components of TeleStaff, ensure the system meets customer security protocols, and ensure performance of the system is acceptable. Technical support will also be available to help set up a TeleStaff interface with other systems, including payroll.

There are typically two Deployment configuration calls, each four hours in duration. These calls are scheduled within a week of each other.

On these web conference calls the PM and the core project team work together to perform basic setup and configuration of the customer's organizational data. The following items in the Setup (General) area of TeleStaff are configured (review section 4 for details):

25. Authorities
26. Work Codes
27. Shifts, Shift Groups, Shift Masks, Shift Rotations
28. Ranks, Specialties, and Groups
29. Pay Information
30. Penalties
31. Special Days

- 32 Roster
- 33 Deployable units/events
- 34 Formula IDs
- 35 Calendar
- 36 Roster
- 37 Manage People
- 38 Filters

After each call, the project team applies the acquired knowledge and completes any assigned homework. For each database configuration required (determined during the Initiation Phase), the Project Lead must commit the appropriate resources to the configuration training team.

The configuration training team must be available for all deployment configuration calls.

The purpose of configuration training is to:

- Teach the configuration training team to use TeleStaff in their environment
- Have the configuration training team conduct configuration tasks using proprietary data
- Ensure the configuration training team has acquired the knowledge to complete the configuration, test the configuration, and train staffers and end-users
- Begin testing the configuration, if time permits

In the weeks immediately following configuration training calls, the configuration training team will focus on completing all outstanding TeleStaff configuration tasks. If the hours of PM time allotted for configuration training follow-up (up to 10 hours) are not used by the customer, they do not roll over into subsequent phases.

The PM will also be available for one 4 hour Train the Trainer or Administrator Training Call. On this call, the PM will review basic staffer usage and best practices.

The PM reviews the terms of the Customer Support Agreement and Help Desk procedures. After the configuration follow-up calls are completed, the Help Desk becomes the primary support point of contact for the customer.

During the configuration follow-up week, the customer project team evaluates the TeleStaff standard reports.

Testing

The PM and Testing Coordinator prepare for configuration testing, by reviewing the following topics:

- How to develop a test plan
- How to develop test scripts for work code usage by testing all possible scenarios currently defined by existing business process manuals
- How to determine who should be involved in testing (i.e. super-users, key sponsors of the system, change agents)
- How to capture and document errors/bugs/enhancement requests resulting from testing

The Testing Coordinator uses this information to develop a test plan and test scripts in preparation for configuration testing. It is important to begin working on the Test Plan and Test Scripts immediately after the Kick-off Call to keep the process moving efficiently.

Once TeleStaff is fully configured for work code usage, rigorous testing occurs by the selected testers, per the Test Plan.

Configuration testing includes testing all the components: phones, Contact Manager, Line Manager, Task Manager, E-mail Manager, Fax Manager, and web access

The Testing Coordinator is responsible for creating the Test Plan, assigning users to test the system, creating Test Scripts, capturing the results of testing, and notifying the configuration training team of any configuration re-work necessary to get TeleStaff ready for production.

Training

The PM and the Training Coordinator prepare for staffer and end-user training, including:

- ▣ Reviewing Section 6 of this guide
- ▣ Developing a Training Roll-Out plan
- ▣ Developing training materials (based on existing SOP manuals)
- ▣ Preparing resources for department-wide training
- ▣ Preparing for cultural change

The Training Coordinator develops the **Training Plan** and training documentation in preparation for staffer and end-user training.

The Training Team conducts **Staffer/Administrator training classes** per the Training Plan. Key administrators of the system receive expert-level training as well as end-user training. These people may be selected to train end-users.

The Training Team and selected administrators conduct **end-user training classes** per the Training Roll-Out Plan. This training is based on scenarios that typical end-users will encounter on a daily basis to review their personal calendar, sign up for work, or request a work exception.

PDSI Testing/Training Support

- ▣ During the testing/training phase, the PM is available to support the project team for a maximum of 10 hours.
- ▣ These hours must be scheduled in advance.
- ▣ If any portion of the allotted hours for testing or training support is not used, they cannot be carried forward to another phase.

Phase 4 – Deployment Phase

This phase is typically accomplished in two stages:

39. Parallel testing for 2 weeks
40. Go into production with TeleStaff for the roster, calendar, and work code usage.

After production, the Help Desk will become the first point of contact for technical issues or questions related to TeleStaff.

Section 2 Data Collection

Data collection is a critical part of the TeleStaff deployment process. In order to create a TeleStaff database for the department, PDSI needs to import the department's personnel and organizational information into TeleStaff.

The customer project team collects the departmental data in an MS Excel spreadsheet and delivers it to the PM for review. The PM reviews the spreadsheet with the customer project team via web conference call(s) until the correct structure is achieved.

Once the data is finalized, the PM generates a TeleStaff database for the department, which will be used for pre-configuration training. The PM conducts pre-configuration meetings to train the project team on defining shift patterns, entering special days, setting up shift rotations, etc., in preparation for configuration training.

An example is provided below of the data that will be collected in Microsoft Excel™ format:

The screenshot shows a Microsoft Excel spreadsheet titled "TS 2.5 - Fire Spreadsheet.xls [Compatibility Mode] - Microsoft Excel". The spreadsheet has columns A through G and rows 1 through 5. The data is as follows:

	A	B	C	D	E	F	G
1	max. 30 alphanumeric char.	max. 30 alphanumeric char.	max. 20 alphanumeric char.	max. 1 alphanumeric char.	max. 20 alphanumeric char.	max. 50 alphanumeric char. 1-800-850-7374 P:1-800-850-7374 -- Pager F:1-800-850-7374 -- Fax E:bob@pdsi-software.com -- email	max. 50 alphanumeric char. 1-800-850-7374 P:1-800-850-7374 -- Pager F:1-800-850-7374 -- Fax E:bob@pdsi-software.com
2	Employee ID	Payroll ID	First Name	M.I.	Last Name	1st Contact	2nd Contact
3							
4							
5							

Step 1 Select the Import Manager Data Fields

Each field listed below represents a data element that can be imported for each person. Review each field to determine if that field is desirable to import into TeleStaff. A description of each field is provided in this section. This checklist only defines the fields that are desirable for the *initial* creation of the database.

- *DO NOT DELETE any columns on this spreadsheet even if the non-mandatory field will not be imported.*

The second step in this process is to hold the Data Collection call. During this call, we will review all columns. Fields can be re-imported into the database at a later date, if necessary. Use the below checklist to tag the fields for TeleStaff (Mandatory fields are **bolded**):

Person Information – General

- **EMPLOYEE ID** – This mandatory field holds the employee ID number for each person and is limited to maximum of (30) alphanumeric characters. The employee ID identifies the person in TeleStaff and serves as the person's TeleStaff Login ID.
- **PAYROLL ID** – This mandatory field holds the payroll ID for each person and is limited to maximum of (30) alphanumeric characters. This ID must match the ID recorded in the existing payroll system.
- **FIRST NAME** – This mandatory field holds the person's first name and is limited to maximum of (20) alphanumeric characters. Do NOT enter the name information in UPPERCASE because it may distort the TeleStaff roster.
- **M.I.** – This field holds the middle initial for each person and is limited to a maximum of (1) alphanumeric character.
- **LAST NAME** – This mandatory field holds the last name for each person and is limited to maximum of (20) alphanumeric characters. Do NOT enter the name information in UPPERCASE because it may distort the TeleStaff roster.
- **1st Contact** – This field holds the primary contact number of the person and is limited to maximum of (50) alphanumeric characters. TeleStaff automatically formats this field, so if any alpha characters are entered, they are translated into numeric characters. Only one contact method can be defined in this field. Home phone, cell phone, pager, fax number and email can be used as contact methods in TeleStaff. Area codes are only needed for phone numbers that reside outside the area code in which the server resides. If an Area Code is entered, a '1' or '9' need not be entered. Pager numbers should be preceded with a 'P:' (P:123-4567), fax numbers preceded with an 'F:' (F:456-7890) and email addresses should be preceded with an 'E:' (E:staffmember@email.com). PDSI highly recommends utilizing this field when generating a new TeleStaff database; however, it may be imported at a later date.
- **2nd Contact** – This field holds an alternate contact method for the person and is limited to maximum of (50) alphanumeric characters. Refer to 1st Contact description above.

- 3rd Contact – This field holds an alternate contact method for the person and is limited to maximum of (50) alphanumeric characters. Refer to 1st Contact description above.
- 4th Contact – This field holds an alternate contact method for the person and is limited to maximum of (50) alphanumeric characters. Refer to 1st Contact description above.
- ADDRESS (Line One) – This field holds the first address line for each person and is limited to a maximum of (40) alphanumeric characters.
- ADDRESS (Line Two) – This field holds the second address line for each person and is limited to a maximum of (40) alphanumeric characters.
- CITY – This field holds the city name where each person resides and is limited to maximum of (40) alphanumeric characters.
- STATE – This field holds the state abbreviation where each person resides and is limited to maximum of (2) alphanumeric characters.
- ZIP – This field holds the postal code for each person and is limited to a maximum of (20) alphanumeric characters.
- BIRTHDATE – holds the birth date for each person and is limited to maximum of (10) numeric characters in a date format of mm/dd/yyyy.
- GENDER CODE – This field holds the code for Gender and is limited to a maximum of (1) alphanumeric character. The required default is M:Male and F:Female.
- RACE CODE – This field holds the race code information for each person and is limited to a maximum of (1) alphanumeric character.
- OTHER(s) – This field holds information of another contact for this person and is limited to maximum of (40) alphanumeric characters.

Person Information – Profiles General

- JOB TITLE** – This mandatory field holds the name of the person's Job Title (or Rank) and is limited to maximum of (40) alphanumeric characters. **This field is required for creating an assignment and profile for the person in TeleStaff; if the field is left blank, no Profile or Assignment will be created by the Import Manager.** To avoid a cluttered TeleStaff roster, use a data format of abbreviation:long name (e.g., O:Officer, FF:Firefighter, SUP:Supervisor). Abbreviations are limited to (10) alphanumeric characters. We also recommend NOT to use all capital letters in any long name.
- JOB SKILL** – This field dictates a person's Job Skill and is limited to maximum of (11) numeric characters. Job Skill can be used during sorting algorithms to distinguish between staff with the same Job Title. Unlike Job Level, Job Skill is not limited to sorting staff in ascending or descending order. Job Skill can focus on a specific level of a Job Title. For example, an Administrator Job Title is defined with having Job Skills 1, 2, and 3; with 1 being the most experienced.

You can configure TeleStaff to specifically select an Administrator(s) with a Job Skill = 2 for a staffing list.

- **CAN ACT AS** – This field holds the name(s) of the person’s “Can Act As” job titles and is limited to a maximum of (256) alphanumeric characters. “Can Act As” is the field that defines the job titles a person can move up or move down to work. The job titles in this column must match those defined in the Job Title column. To avoid a cluttered TeleStaff roster, use a data format of abbreviation:long name. Abbreviations are limited to (10) alphanumeric characters. If the person has multiple Can Act As Job Titles, separate each Job Title with a comma with no spaces (e.g., O:Officer,SUP:Supervisor).
- **SPECIALTY** – This field holds the specialties for the person and is limited to maximum of (256) alphanumeric characters. A Specialty is a unique identifier that can define a requirement for a specific staffing need. TeleStaff lists can select personnel by specialty. Furthermore, an expiration date can be attached to the specialty to tag when the specialty will expire. To avoid a cluttered TeleStaff roster, use a data format of abbreviation:long name(expiration date) (e.g., TRN:Trainer(11/11/2008)). Abbreviations are limited to (10) alphanumeric characters. If there is more than one specialty, enter them as a comma-delimited list: (e.g., TRN:Trainer,HM:Hazmat(04/04/2008),REC:Recruiter).
- **GROUP** – This field dictates the group(s) that a person is assigned and is limited to a maximum of (256) alphanumeric characters. Groups can be used for specific staffing needs. For example, persons who are assigned a Special Events group can be pulled by TeleStaff to fill for a Special Events vacancy on the TeleStaff roster. To avoid a cluttered TeleStaff roster, use a data format of abbreviation:long name (e.g., SE:Special Events). Abbreviations are limited to (10) alphanumeric characters.

Person Information – Profiles Advanced

- **PROMOTION DATE** – This field holds the promotion date for the person’s Job Title and is limited to a maximum of (10) numeric characters in a mm/dd/yyyy date format. Promotion date is often used in TeleStaff as sorting criteria for a qualified staffing list.
- **OPPORTUNITY NUM.** – This field dictates a person’s individual opportunity number and is limited to a maximum of eleven (9,2) numeric characters. Opportunity numbers are useful in ordering a group of persons based on a specific ranking. For example, seniority can be defined with a person’s hire date and their score on the entrance exam. Assigning persons an opportunity number enables TeleStaff to sort a staffing list based on the seniority level of the person in relation to the entire department. This field is typically left blank during the initial creation of a TeleStaff database.
- **HOURLY WAGE** – This field holds the hourly wage information for each person and is limited to a maximum of eleven (7,4) numeric characters. TeleStaff cost reports are dependent on the information provided in this field. TeleStaff automatically formats this field and a currency symbol is not required.

- SPECIAL DATE – This field holds the special date for each person and is limited to a maximum of (10) numeric characters formatted as mm/dd/yyyy. Special date is typically the hire date of the person, but can also represent any date-sensitive criteria necessary for fair staffing.
- LICENSE NUM. – This field holds the driver's license number for each person and is limited to maximum of (40) alphanumeric characters.
- LICENSE CLASS – This field holds the license class information for each person and is limited to maximum of (20) alphanumeric characters.
- LICENSE EXP. – This field holds the license expiration date information for each person and is limited to maximum of (10) numeric characters in mm/dd/yyyy date format.
- LOCATIONS – This field holds the location information for each person and is limited to maximum of (100) alphanumeric characters. Locations are used for proximity configurations in TeleStaff and typically hold the city name of the person. For example, when a vacancy occurs at a station you can configure TeleStaff to find an available person who resides closest to that vacancy. This field is typically left blank during the initial creation of a TeleStaff database. To avoid a cluttered TeleStaff roster, use a data format of abbreviation:long name. For example, L1:Location 1. Abbreviations are limited to (10) alphanumeric characters.

Person Information - Assignments

- SHIFT – This mandatory field holds one regularly assigned shift for each person and is limited to maximum of (40) alphanumeric characters. **The Import Manger will not create an Assignment for the person if this field is left blank.** If a person works on several shifts, list only one and setup an assignment rotation after the database has been generated. To avoid a cluttered TeleStaff roster, use a data format of abbreviation:long name (e.g., A:Shift A). Abbreviations are limited to (10) alphanumeric characters.
- SHIFT MASK – This field holds one shift mask for each person and is limited to maximum of (40) alphanumeric characters. A Shift Mask reflects a person's regularly assigned days off. Use a data format of abbreviation:long name (e.g., T/Th:Tuesdays and Thursdays Off). Abbreviations are limited to (10) alphanumeric characters. **A Shift Mask must have a corresponding shift. If a person is missing a shift, the Import Manager will not assign a Shift Mask.** If you wish to Import Shift Masks please contact the PM.
- AGENCY – This mandatory field holds the agency assignment for each person and is limited to maximum of (40) alphanumeric characters. **The Import Manager will not create an assignment for a person in TeleStaff if the Agency field is left blank.** To avoid a cluttered TeleStaff roster, use a data format of abbreviation:long name (e.g., PDSI:Principal Decision Systems International). Abbreviations are limited to (10) alphanumeric characters.

- REGION** – This mandatory field holds the region assignment for each person and is limited to maximum of (40) alphanumeric characters. **The Import Manager will not create an assignment for a person in TeleStaff if the Region field is left blank.** To avoid a cluttered TeleStaff roster, use a data format of abbreviation:long name. Examples: PB:Patrol Bureau or B1:Battalion 1 or ADM:Administration. Abbreviations are limited to (10) alphanumeric characters.
- STATION** (or equal to) – This mandatory field holds the station assignment for each person and is limited to a maximum of (40) alphanumeric characters. Persons who do not have an assigned Station can enter their *preferred* Station or leave blank. If left blank the person will be unassigned in TeleStaff. To avoid a cluttered TeleStaff roster, use a data format of abbreviation:long name (e.g., A1:Area 1, S1:Station 1). Abbreviations are limited to (10) alphanumeric characters.
- UNIT** (or equal to) – This mandatory field holds unit assignment for each person and is limited to a maximum of (40) alphanumeric characters. Persons who do not have an assigned Unit can enter their *preferred* Unit or leave blank. If left blank the person will be unassigned in TeleStaff. To avoid a cluttered TeleStaff roster, use a data format of abbreviation:long name (e.g., U1:Unit 1, P1:Post 1, OS:Office Staff). Abbreviations are limited to (10) alphanumeric characters.

Roster Information

The Agency, Region, Station, and Unit fields determine the setup of the TeleStaff roster. Below is a roster representation of the above assignment for Jeffrey Salazar:

Agency	Region	Station	Unit
Tech Coast Law Enforcement	Field Operations	North	Patrol
<input type="checkbox"/> Wednesday January 19, 2005			
<input type="checkbox"/> Tech Coast Law Enforcement			
<input type="checkbox"/> Field Operations			
<input type="checkbox"/> W-Sun Day Shift			
<input type="checkbox"/> North			
<input type="checkbox"/> Motor Unit			
	Sergeant M	Dalton, Charles D. (M/RI)	000005
	Officer M	Cadan, Frank A. (DRE/M)	009511
	Officer M	Langeliers, Scott R. (AR/M)	009902
<input type="checkbox"/> Patrol			
	Captain	Graves, Lauren A. (RI/ST)	001450
	Sergeant	Salazar, Jeffery J. (AR/RI/ST)	000102
	Officer	Trenholm, Robert	000117
	Officer	Jones, Bob F.	000875
	Officer	Heredia, William	000211

Agency	Region	Station	Unit
Tech Coast Fire	Battalion One	Station One	Engine 1

[-]	Tuesday July 19, 2005		
[-]	Tech Coast Fire		
[-]	(01) Battalion One		
[-]	A Shift		
[-]	(01) Station One		
[-]	Engine 1		
	Captain	Salazar, Jeffrey A. (HM/PM)	00103
	Engineer	Suarez, Mark J.	00085
	FireFighter	Mosqueda, Michael (HM)	00117
	FireFighter	Aguilar, Lewis	00186
[-]	SAM 1		
	FireFighter PM	Van, James E. (PM)	00175
	FireFighter PM	Gammon, Albert (PM)	00157
[-]	Truck 1		
	Captain	Garcia, Robert J.	00041
	Engineer	Waelder, David D.	00066
	FireFighter	Ybarra, Michael D.	00132

Additional Information

- ✖ **RETIRED** – This required field dictates whether the person is actively working and is limited to a maximum of (1) alphanumeric character. The required default is Y:Yes and N:No. PDSI recommends importing only active personnel when creating a new TeleStaff database.
- ✖ **POSITION NAME** – This field holds the position name information for each person and is limited to maximum of (40) alphanumeric characters. By default, TeleStaff uses Job Titles to name the positions defined under each unit. If the organization has another definition for position names, define that name in this field. This field is typically left blank during the initial creation of a TeleStaff database.

DO NOT USE THE FOLLOWING CHARACTERS in the spreadsheet:

> < ' & " ; = +

Section 3 Work Code Considerations

The questions detailed below are designed to provide information about current payroll expectations for TeleStaff. TeleStaff will become the main staffing system, so it is important to detail the rules that govern how payroll codes are applied in staffing scenarios.

Only non-confidential work codes should be entered into TeleStaff due to the public nature of the roster and advanced calendar.

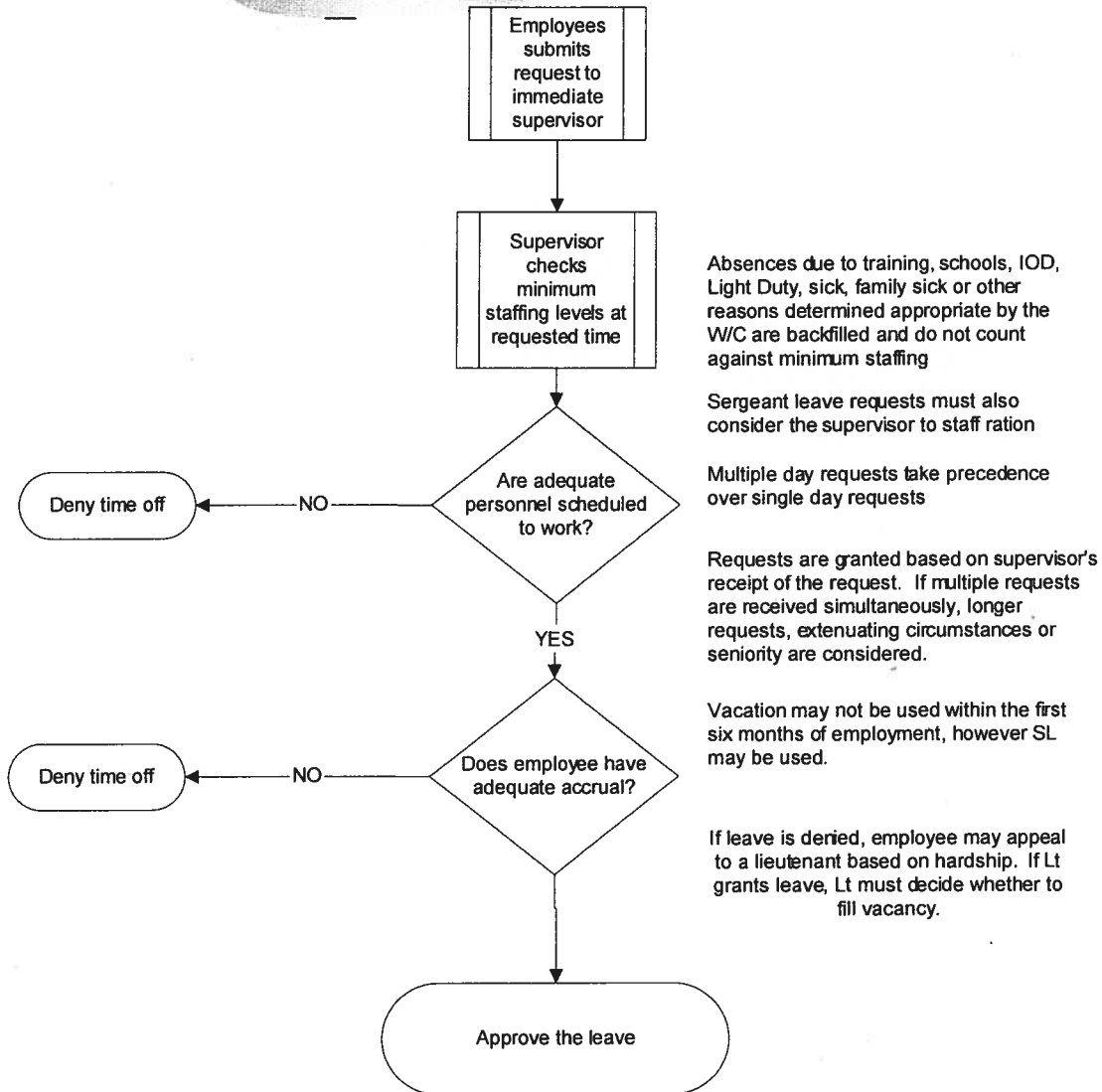
2. Provide a list of work codes.
 - d. For each work code, include a roster abbreviation and a payroll name (e.g., (VA)Vacation).
 - e. The abbreviation (VA) represents the Vacation work code on the TeleStaff roster. When someone is on vacation, they can be visually identified on the TeleStaff roster by the work code abbreviation.
 - f. The roster abbreviation code can also be the abbreviation code used by Payroll as an identifier.
41. Determine which work codes, if any, apply toward FLSA.
42. Determine which work codes are excluded from probationary staff.
43. Can people sign up for overtime?
 - g. Can people sign up for full days of overtime?
 - h. Can persons sign up for partial days of overtime?
44. Are there established codes that need to be incorporated into TeleStaff to accommodate signups?
 - i. AFS = Available full shift
 - j. APS = Available partial shift
45. Determine which work codes need to be 'logged' for fairness or to sort a call back list, please provide the details. For example:
 - k. Total hours worked
 - l. Total offers
 - m. Counts
 - n. Last date/time worked
46. Provide a list of work codes that do not require approval from a person with higher authority
47. Provide a list of work codes that require approval from a person with higher authority.

Diagram Payroll Codes

Provide a list of all rules, policies, and procedures for each of the work codes defined above. For instance, what are the parameters that dictate when an employee can take vacation?

Use the below example as a starting point:

Sergeant - Vacation Leave Request



TeleStaff Authority Considerations

Before training, analyze the levels of Authority that are to be associated with each job title. TeleStaff Authority ranges from **Full Access** (access to all areas of TeleStaff) to **Base Access** (login access only). TeleStaff offers many different levels between full and base access. Determine which areas of TeleStaff will be accessed by the different job titles. Here are sample questions to get started:

48. Which job titles are responsible for staffing personnel?
49. Which job titles can approve vacations, leave, etc.?
50. Which job titles can view other people's personal information?
51. Which job titles have access to review departmental reports (such as cost reports)?

Section 4 Deployment Configuration

Based on the information provided in Section 2, the PM creates a unique TeleStaff database for the organization. The PM reviews the database with the customer project team to ensure the organization structure is accurate. The information contained in this section should be read by the project team, before the configuration web conferences with the PM.

Database Review

- ▣ Setup Organization
- ▣ Roster Review

Deployment Configuration Overview

- ▣ Security
 - ▣ Login Policy
 - ▣ Authority
- ▣ General
 - ▣ Job Title
 - ▣ Specialty
 - ▣ Group
 - ▣ Pay Information
 - ▣ Penalty
 - ▣ Location
 - ▣ Special Day
 - ▣ Special Day Group
 - ▣ Formula ID
- ▣ Shifts
 - ▣ Shift
 - ▣ Shift Group
 - ▣ Shift Mask
 - ▣ Shift Time
- ▣ Codes
 - ▣ Dynamic Issue
 - ▣ Dynamic Values
 - ▣ Work Code
- ▣ Attachments
- ▣ Organization
 - ▣ Unit Type
 - ▣ Structure
 - ▣ Event Type
 - ▣ Extra Unit

.....

Database Review

Organization Structure

Check and verify the organizational hierarchy in TeleStaff.

Agency

3. To review the Organization setup login to TeleStaff (check the **Include Setup (if authorized)** checkbox).
52. Go to **Setup > Organization > Structure**
53. The Organization folder contains subfolders that display the hierarchy of the organization defined in the Import Manager.
54. The first subfolder, *Agency*, contains the name of the organization.

Region

Verify that all the regions are correct in the Agency.

4. First click on the '+' symbol next to the name of the Agency to display the *Region* subfolder:
55. Confirm that the correct regions are displayed.
56. If a Region is missing right click on the *Region* subfolder, select **New**, and type in the name for the new Region.

Station

Verify that all the stations are correct in *each* Region.

5. Click the '+' symbol next to the name of one of your Regions to display the *Station* subfolder:
57. All Stations for the selected Region are displayed below the station subfolder.
58. Confirm that the correct stations are displayed.
59. If a Station is missing right click on the *Station* subfolder, select **New**, and type in the name for the new Station.
60. Check the Stations in all the Regions.

Unit

6. Click the '+' symbol next to the name of one of the Stations to display the *Unit* subfolder:
61. Make necessary corrections and/or additions to this area as needed.
62. If a Unit is missing right click on the *Unit* subfolder, select **New**, and type in the name for the new Unit.
63. Check the Units in all the Stations.

Position

64. Click the '+' symbol next to the name of one of the Units to display the *Position* subfolder:
65. Make any necessary corrections and/or additions to this area as needed.
66. If a Position is missing right click on the *Position* subfolder, select **New** and type in the name for the new Position.
67. Check the positions on all the Units.

Roster

Check the TeleStaff roster for people's assignments and make the necessary corrections in the Organization section of the Setup folder and the Assignments TAB of the Person window. To correct a person's assignment:

68. Double click on the NAME of the person that is on the wrong position.
69. The Person window displays. Select the Assignments TAB.
70. Make the necessary changes to the assignment.
71. Continue to review every person on the roster to ensure that they are in the correct position on the correct shift.

During the deployment configuration, the shifts that were set up with the initial import will be reviewed in detail. These shifts were originally created via the data spreadsheet so they are only associated with the people that were initially imported. It may be necessary to make some shift changes now to reflect the roster correctly.

Deployment Configuration

Security

Log-in Policy

TeleStaff has built-in security which allows the organization to define the level of access to any given user. As a result, TeleStaff requires each user to enter a login ID and password. Every time a user accesses TeleStaff or when TeleStaff contacts a person, the first action that must be taken is to properly login to TeleStaff.

In addition to logging into TeleStaff over a workstation, the same ID and password will be required when accessing TeleStaff over the telephone or through web access. Each Login Policy defines the usage for Passwords for logging into TeleStaff. From the Navigator, open the **Setup > Security** folder.

Refer to the Configuration Guide for more information.

Authority

TeleStaff is able to allow or restrict users from different areas or functional abilities. The Authorities that are created during configuration will define what a user can and cannot do within the program. Create as many Authorities as needed to allow specific access to fields within TeleStaff for specific users. For example: basic users might have access to their personal calendar and to view the roster; while staffers who need more functionality will be able to modify the roster and add work codes. There will be one final group of people who will have access to the Setup folder where the actual configuration of TeleStaff is accomplished.

Refer to the Configuration Guide for additional descriptions.

General

Job Title

A Job Title, or Rank, is the title that a person holds in the organization. For some departments the Rank also designates the position. For example, Firefighter is a job title *and* a position. In other departments the job title does not designate the position. For example, the job title is Captain but the position is Seat 1. In TeleStaff, a job title is assigned a default authority level to allow / disallow access to certain windows or functions of TeleStaff. This authority can be overridden by another authority placed on a person's profile. Refer to the Configuration Guide for more information.

Specialty

This area of TeleStaff is designed for tracking certifications, also known as specialties. Specialties can be used to exclude people from working opportunities if they lack a specialty or if a specialty has expired. The expiration date is an optional field located in the person's profile.

Specialties can appear on the roster next to the person's name and can be configured with expiration dates. **For example**, a person may be a Firefighter but they are certified as a paramedic to work on an ambulance. Refer to the Configuration Guide for more information.

Group

Groups can be used to solve configuration issues or to make the staffers' day-to-day tasks simpler. There may be a need to target a group of people to either include or exclude them in a staffing rule. Groups can also be used to indicate special skills (e.g., Spanish speaking, Italian speaking, or photographer); however, there are two basic differences between specialties and groups. Group designations do not appear on the roster next to the person's name and group memberships cannot be configured with expiration dates.

For example, a “Never Call for OT” group can be created. By placing people who don’t want to be called for OT in this group, TeleStaff can exclude them from the overtime call back procedures. Refer to the Configuration Guide for more information.

Pay Information

This is where the organization’s payroll and FLSA information is configured. These fields are optional so neither the FLSA nor the payroll information needs to be completed. If TeleStaff will be used to help with payroll tasks then these fields should be configured. After Pay Information is configured, payroll symbols and/or FLSA symbols appear on the Calendar. Payroll periods and FLSA periods can then be used to run reports for the relevant periods.

Refer to the Configuration Guide for more information.

Penalty

Charges are penalties for non-acceptance of an offer. They are applied automatically by TeleStaff or directly by an authorized staffer. Automatic charging is accomplished by associating a penalty for non-acceptance of an offer to a particular List.

For example, if a person signs up for overtime and then rejects the offer when called, they are charged hours for rejecting the overtime offer from the “Signup” List. TeleStaff automatically increments the penalty hours stored within the person’s bucket or inserts a charge code depending on the configuration settings. Even if the person has not been reached after the defined number of contact attempts, they are charged because they signed up and were not available to respond to the offer before it expired.

Refer to the Configuration Guide for more information.

Location

Create locations if staffing processes or business rules are dependent on proximity. These locations can refer to anything: a city, street corner x, north, south, etc. Each of these locations may have an assigned departure location.

Values in the location matrix represent the distance a departure location is from the next location. The values can represent time, physical distance, or any scheme to reflect proximity. The smaller the number value, the closer the departure location.

Refer to the Configuration Guide for more information.

Special Day

Special days refer to days where different staffing procedures or business rules are followed. These days may reflect holidays.

Refer to the Configuration Guide for more information.

Special Day Group

The Special Day Group is created to group special days together. This grouping of Special Days can be used within the rule filters to target a group of special days rather than just one day.

In order for a Special Day to become visible on the Calendar, include it in the Special Day Group “Display on Calendar and Roster”.

Refer to the Configuration Guide for more information.

Formula ID

A Formula ID is composed of constant text (constants) and variable text (variables). Constant text is text that is displayed exactly as entered (without change), Variable text is specially formatted text that will be converted to new values obtained from the source data (e.g., from Roster records or People records).

A Formula ID can contain variables and constants in any combination. The only limit to a Formula ID is that its result (the text resulting from a solved Formula ID) cannot be more than 1024 characters.

This topic will be further discussed during Configuration training.

Shifts

Shift

Shifts are designed to define the work schedule for people or positions.

Configure the shift patterns for every shift initially created via the import spreadsheet. Create additional shifts, if necessary.

Refer to the Configuration Guide for more information.

Shift Group

Shift Groups are optional in TeleStaff. Their purpose is to combine shifts together. The user’s default view when entering the calendar only displays their shift days or duty days. Some people may wish to

view the duty days of other shifts. A Shift Group may be created to group designated shifts together. This Shift Group can be attached to a person's profile enabling them to see all the duty days of those shifts within the group on their personal calendar.

A Shift Group may also be utilized to create rules that target a specific group of shifts rather than just one. Refer to the Configuration Guide to create a new shift group.

Shift Mask

Masks are created when people assigned to the same shift have the same start time and duration, but their day off cycle changes on an individual or position basis. After creating the Shift Mask, go to each person's **Assignment** window and attach the corresponding Shift Mask. Some agencies may choose to place the Shift Mask at the position level reducing the need to reassign Shift Masks during a bidding process.

Refer to the Configuration Guide for more information.

Shift Time

Special times are created when people assigned to the same shift have different starting times or durations. A special shift time can be assigned to a person or position.

Refer to the Configuration Guide for more information.

Codes

Dynamic Issues

Dynamic issues represent the organization/union/department's business rules and regulations as they relate to the use of work codes.

Dynamic Issues utilize Dynamic Arguments to give the rule building process extra flexibility. Each Dynamic Issue can be placed within multiple work codes so they do not have to be duplicated more than once; they can be reused over and over.

Dynamic Issues are typically designed to stop the usage of a work code based on certain parameters (business rules). Dynamic Issues are rules that define when a work code is denied or converted to a request.

Refer to the Configuration Guide for more information.

Dynamic Values

Dynamic Values house the configuration of the Work Code Detail drop down options. Work Codes may have static Detail Codes that are used in conjunction with the Work Code to further describe the reason why the person is utilizing the Work Code.

For example, an overtime work code may be configured in TeleStaff; however, there are different types of Overtime the department utilizes. A Detail Code can be used to further define the reason why the Overtime was issued.

Refer to the Configuration Guide for more information.

Work Code

TeleStaff utilizes work codes to identify the working or non-working status of a person. If TeleStaff will feed a payroll system, the work codes must match those in the payroll system.

Refer to the Configuration Guide for more information.

Attachments

Attachments keep track of, and display, anything (e.g., equipment, supplies, notes) that can be assigned to people or to any level of the organization (e.g., Agency, Region, Station, Unit).

Attachments can be assigned to one person or they can be shared by multiple people and/or multiple levels of the organization. They can also be assigned for a specified date range.

Attachments replace what was originally referred to as notes and inventory (in versions previous to 2.2).

Refer to the Configuration Guide for more information.

Organization

Unit Type

In TeleStaff, positions reside within units. A Unit Type defines the specialties that a unit of this type requires. Unit Types are defined in General Setup and are then attached to units. Refer to the Configuration Guide for more information.

Structure

The organizational hierarchy should have been reviewed any updated when the database was first created and reviewed. If not, step through each of the five levels and validate each level. Refer to the Configuration Guide for more information.

Event Type

An Event Type defines what, where and how an Event is deployed on the Roster. An Event Type is attached to a unit (defined in the Organization folder). This, in turn, defines where the Event is deployed. In addition, Extra Unit(s) may be attached to an Event Type so that when the Deploy function is applied, the Extra Unit(s) inherit the Event Type settings. Event Types might include special events that regularly occur and require staffing. Refer to the Configuration Guide for more information.

Extra Unit

Extra units have no shifts, positions, or specialties attached to them and exist only to replace the existing vehicles displayed on the Roster. The Copy and Deploy functions utilize the Units defined in this area. If the organization has a need to have their Extra Units configured with special staffing considerations these should be created within the Organization folder of the navigation bar. Refer to the Configuration Guide for more information.

Section 5 Hardware and Software Preparation

Before the project team begins the Data Review calls, the IT Lead will need to set up the TeleStaff server on the network and install the TeleStaff Workstation software on the computers for the members of the project team.

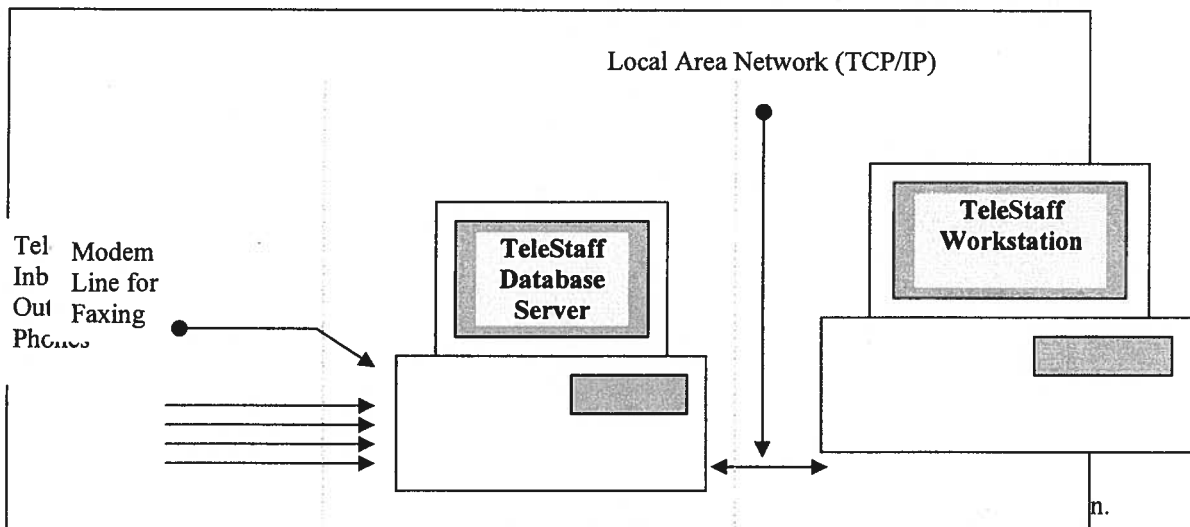
The information contained in this section will help the IT Lead make the necessary hardware preparations for TeleStaff.

TeleStaff Server Setup and Installation

Please make arrangements with the IT department to install the TeleStaff software and all the necessary required components.

Contact the PDSI TeleStaff Helpdesk at (866) 324-1598 for installation and setup assistance, or enter in a ticket through the Web Portal at <http://support.pdsi-software.com>.

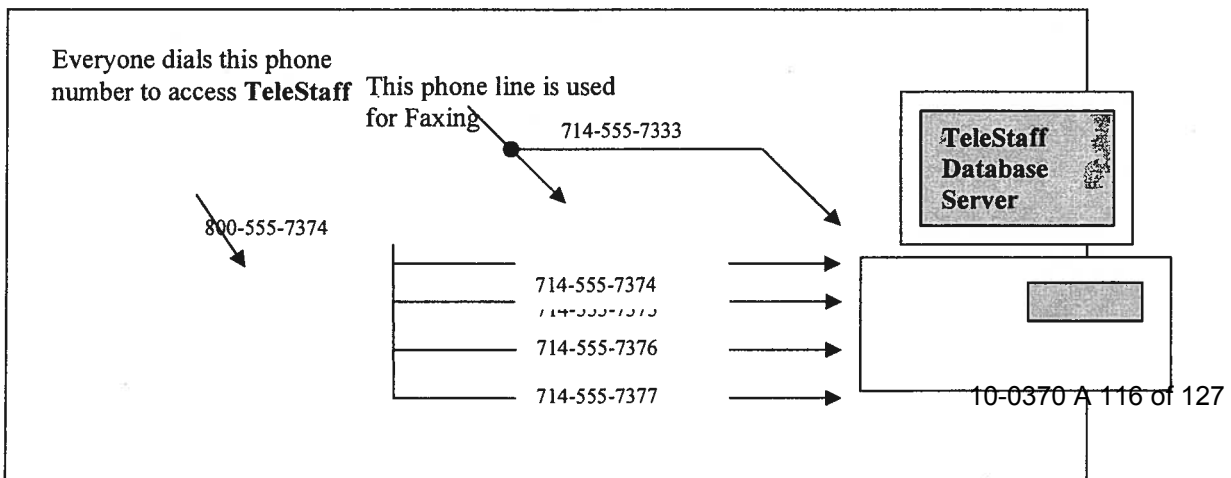
Prior to your appointment, you will need to go to <http://tech.telestaff.com/> and build the installation instructions. Please have the TeleStaff license registration number and the TeleStaff installation CD on hand.



All the phone lines require direct access outside of your institution or building without going through a phone system or PBX. This is the same type of phone line that is installed in a residence. The phone system must be analog.

You will need to establish a Rotary/Hunt Group phone number. A Rotary/Hunt Group is a single phone number that has the ability to ring any one of several other phone numbers. The phone lines that are plugged into the dialogic card should be part of the same Rotary/Hunt Group. One separate phone line should be plugged into the modem if applicable.

An Example:



Network Environment

The ideal environment for the TeleStaff server and client is a domain on an Ethernet LAN with no firewall between the client and server

For additional information, please contact your Product Specialist.

TeleStaff Workstation Setup and Installation

Along with the setup and installation of the TeleStaff server, arrangements will need to be made to install TeleStaff on all the Workstation computers that are to access the TeleStaff server.

The first step is to install the Workstation software on the project team's computers. This should be completed before the project team prior to the first data review call.

The remaining Workstation computers should be installed with TeleStaff shortly before the department begins end-user training.

Contact the PDSI TeleStaff Helpdesk at (866) 324-1598 for installation and setup assistance or schedule an appointment with your Product Specialist by entering in a ticket through the Web Portal.

TeleStaff Workstation Specifications

- Pentium 4.30 GHz Unit or better
- 1Gig RAM
- 40-80 Gig Hard Drive Space
- CD-ROM/DVD Drive
- Keyboard
- Mouse
- Computer sound card (to hear/record voices in the TeleStaff database)
- Speakers (to hear TeleStaff recordings)
- Microphone (to record voices in the TeleStaff database)
- Monitor
- Network Interface Card
- Windows 2003 or XP

Section 6 Final Steps

The completion of the TeleStaff configuration training course represents a milestone in implementing TeleStaff for the organization.

Now that training is complete there are several items that must be addressed to ensure a successful implementation.

Please review the below topics to learn about what the final steps are in completing the TeleStaff implementation Process.

Step 1 Install the configured database on the TeleStaff server

At the completion of configuration training, install the TeleStaff database onto the designated TeleStaff server on the network.

Most organizations require the cooperation and assistance of the IT department, so make these arrangements as soon as possible to allow the IT experts to complete this task.

Step 2 Complete the configuration training tasks

Once the configured TeleStaff database is on the server, the project team should immediately start working on TeleStaff.

Do not put TeleStaff to the side and work on it at a later date! Retention will be lost if the project team is not given the time to work on TeleStaff during the follow-up week.

The first step the project team should take is to complete any configuration that was not completed during the initial class. This will be done with the help of the PM via a web conference.

In addition, the team should work on:

Voice recordings

Ensure that all voice recordings have been made. Test the inbound and outbound phones to determine if the voice recordings are heard clearly. If not, recordings may need to be re-recorded.

Step 3 Develop a Training Plan

Preparation is the key to success! Develop an end-user training rollout plan immediately after the Kick-off Call. Start out by asking the following questions:

7. Who should be trained first?
 - o. PDSI recommends training the staffing administrators and higher end-users first. These are the individuals that require the most training, as they will utilize advanced TeleStaff functions and procedures.
 - p. PDSI suggests four hours of training per staffing administrator.

- 7.2. Who should be trained last?
 - q. PDSI recommends training the end-users after the advanced users. The end-users are personnel who have limited access to TeleStaff and who will mainly be using TeleStaff for personal scheduling purposes.
 - r. Training will go quickly as PDSI recommends one to two hours of hands on training per end user.

73. Where will training take place?

- s. Where the training will take place is important in developing a TeleStaff training rollout plan.
- t. Training can be conducted in a classroom setting with training workstations or in several locations where there is a TeleStaff Workstation available.

74. What is needed to set up a classroom environment?

- u. A classroom setting is an ideal environment because it encourages learning and interaction. When an individual is taken out of an everyday working environment and placed in a controlled, interruption-free environment they are encouraged to focus on TeleStaff.
- v. Set up the training room with stand-alone training workstations, one per end-user. The workstations should be setup with a copy of the production database to allow users to practice with "real" data.
- w. Please get instructions on how to set up training workstations (clients) from <http://tech.telestaff.com>. If you encounter problems with the installation, enter a ticket via the Customer Web Portal.
- x. Have a telephone with a speakerphone available in the training room so that the trainer can demonstrate the TeleStaff telephone features by calling into the TeleStaff server.
- y. If the dialogic boards are not set up and configured in the TeleStaff DB server, the trainer can demonstrate how to interact with TeleStaff using simphones.

75. What is needed for a remote training environment?

- z. Another option is to train users at several locations using TeleStaff Workstation machines.
- aa. The Trainer travels to the trainees and conducts training using workstation machines that are connected to the TeleStaff server, which houses the training database.
- bb. This method of training is practical when it is difficult to schedule the trainees in a classroom environment.
- cc. The downside is that training can be interrupted and oftentimes there are not enough workstations available for each person during the training session.
- dd. The TeleStaff Workstation software must be installed at all training locations. If several individuals are present for training in one sitting, it is ideal to have a Workstation available for each person.

76. What database is used for training purposes?

- ee Conduct training off of a copy of the live production database.
- ff By training off of a copy, the trainers and trainees are free to explore TeleStaff without worry. Trainers have the freedom to use staffing scenarios and test data for examples.
- gg. Once training is complete, the training database(s) can be deleted.

77 What department resources are needed to rollout training?

- hh. IT resources are needed for setting up the training room or installing TeleStaff on the computers used to access the TeleStaff server. If training is conducted in a central location the training computers need to be installed with TeleStaff training software.
- ii. Clerical resources are often utilized to organize, edit, and print all training manuals, sample TeleStaff reports, and handouts for training.
- jj. Administrative resources are usually needed to reserve the training room(s), set time schedules of training start and end times, and manage individual schedules for personnel to attend training.

The answers to the above questions will give you an idea of how much time is needed to rollout training. After answering these questions you can put together a timeline of how long it will take to rollout training. At this point you will know how many individuals need to be trained, when they will be trained, and where.

End-User Training

Estimated classroom training time for using the basic features within the My TeleStaff area of TeleStaff (main area that end-users utilize) is approximately 1 to 2 hours.

All users of the system (including end-users, staffers, and administrators) will attend this training.

Recommended maximum number of people per classroom is 20.

Using My TeleStaff (All Users)
Login-in/logout procedures
Navigator overview
Personal Calendar Management – tool tips, symbols, views, navigation, adding leave codes, adding sign-up requests, trades, access roster, access pick lists
Personal Information Management – understanding general, profiles, assignments, messages, paybacks, penalty, and logged tabs
Personal reporting – overview of types of reports (accruals, audit, contact log, costs, exceptions, expirations, payback, payroll, personal history, roster, summary)
Introduction to TeleStaff Roster – views, creating vacancies, shifts
Interacting with TeleStaff through the Telephone
(Optional) Web access module Training
Total Training Time = 1-2 hours

Administrator and Staffer Training

In addition to the general end-user training above, Staffers and Administrators will require additional training on the advanced administrative features of TeleStaff (located in the Manage and Set-up folders). Estimated classroom training time for utilizing advanced features of TeleStaff is approximately 4 hours. Recommended maximum number of people per classroom is 20.

Managing TeleStaff (Admin/Staffers)
Roster – customize roster views, edit and manage vacancies, staff vacancies using drag and drop and fill by person windows, edit and manage vacancies, switch staff assignments, off-roster staff, copy an deploy units, deploy events, manage staff information, access and review contact logs, finalize and fix a roster
Advanced Calendar – open and navigate, analyze work exceptions, approve requests, review work trends of persons, off-roster members from Calendar
People - Navigate and customize people window; edit staff information; create and manage profiles, assignments, messages, paybacks, penalties, work history, and bucket changes
Reports – produce department-wide reports, individualize a report, and analyze report details, export reports.
Using Advanced Filters
Assigning Attachments
Outbound calling
Administrative Management – adding/removing persons
(Optional) Web access module training
Total Time = 4 hours

Step 4 Develop a timeline for testing and cutover

Project timeframes are critical in implementing TeleStaff. Set dates for when to start training, when to start parallel testing, and when to go into production with TeleStaff. These dates will keep the project team on track. The important thing to remember is to allow the project team enough time to complete the tasks ahead.

Training start date

When setting a training date, take into account the amount of time needed to complete the TeleStaff database. This includes configuration and testing. Keep in mind the amount of time needed to reserve the resources necessary to rollout training. These resources include:

- IT personnel for the installation and setup of the training workstations
- Administrative personnel for printing out all training manuals and documents
- Training personnel who will conduct the training for the department.

Parallel start date

A Parallel start date is a milestone for the project team. Parallel begins when the staffing administrators use TeleStaff *in conjunction* with the department's current roster, calendar, and work code request system. Parallel is the first step in helping the department changeover from the current process to TeleStaff. PDSI recommends a parallel testing period that is no longer than two weeks.

Cutover date

This is the day that the department *exclusively* uses TeleStaff to view the roster, calendar, and request work exceptions. The department is dependent on TeleStaff. This does NOT imply that the department is utilizing ALL of the TeleStaff features.

The Cutover Date is usually two weeks after the parallel start date.

Step 5 Develop training materials

When developing training materials for the end-users, start by analyzing what the users need to know about TeleStaff. Presenting too much information to the end-users may be overwhelming; however, if the training does not include enough information about TeleStaff, there may be doubts and concerns of how it will work in the organization.

Listed below are fundamental topics that should be covered when training on TeleStaff:

- ▣ Review how to login to TeleStaff using a TeleStaff Workstation machine, the Telephone and/or Web access module.
- ▣ Include a review of the TeleStaff Help screens.
- ▣ Demonstrate the selecting capabilities on the personal calendar. Give examples on how to request time off, sign up for work, and perform shift trades with other employees.
- ▣ Review the person information window. Review how to change a password and the contact phone numbers.
- ▣ Design the training materials to represent **practical usage of TeleStaff**. Make handouts of Reports and Work Codes for the staff to review.
- ▣ Review how to call TeleStaff over the telephone. Allow the class to listen to TeleStaff as it responds while entering various exceptions or signup codes.
- ▣ Create laminated cards of the work codes that people need to utilize when working with TeleStaff.

Review the end-user and staffer training manuals in the Customer Support documents area at www.telestaff.com for guidance in creating custom training materials

Step 6 Prepare the trainers

TeleStaff will be a new concept to the organization. It is important that when the trainers introduce TeleStaff to the end-users, they follow a simple but well organized format. If the format is complex, the end-users will be distracted trying to keep up with the training instead of absorbing what they need to learn. A simple and well organized training format will ensure the end-users learn what they need to know about TeleStaff.

Listed below are a few ideas on how to prepare the trainers for TeleStaff training:

Define the goals of the training class

- Explain the purpose for TeleStaff training.
- Start by giving a general overview of TeleStaff.
- The trainers should focus on how the department and the employees will benefit from using TeleStaff.

Show confidence in TeleStaff

- The trainers should present TeleStaff with confidence and understanding. To do this the trainers must be given the time to learn TeleStaff.
- The trainers should understand all the concepts behind TeleStaff and feel comfortable enough to present them to others.
- When the trainer is confident in TeleStaff, the trainees will be as well.

Answer questions directly

- Direct questions deserve direct answers.
- If a question cannot be answered, the trainer should write down the question (in the presence of the trainee) and ensure them that an answer will be sought.

Repeat questions aloud

- Questions are a great training aide.
- Repeat the question aloud so the whole class can hear.
- Most likely there are other individuals who might be thinking the same question.

Devise scenarios that are applicable to the target audience

- Have the trainers use examples that pertain to the subject material.
- Examples should be simple, realistic, and informative. Do not use complex examples as they can frustrate the trainees.

- Keep the examples simple and the trainees are more apt to understand them AND they are more likely to ask follow up questions.

Explain how the user benefits from TeleStaff

- This is applicable to everyone in the department.
- Explain how TeleStaff will help them in managing their work schedule.

Provide a contact name and number for help

- Hand out a department contact name and number for users to call in case they need help.
- This information will help the users feel more comfortable knowing that they have someone to call if they have any questions.

Step 7 Parallel

Parallel testing exists to ensure that the new system will work as planned. It will also help with the changeover of staffing systems. During this period, the staffing personnel work with both the current staffing system and TeleStaff. The parallel period should be long enough to validate the new staffing system, but short enough that the staffers are not overly burdened. When the parallel period goes on indefinitely (or longer than necessary), staffing mistakes increase, system acceptance drops due to double-entry, and the probability for burn out increases.

In an effective parallel environment, the staffing personnel create the daily rosters and fill vacancies using the current staffing system and TeleStaff. The results should be the same.

Parallel testing follows closely on the heels of administrator training. The project team should start parallel shortly after training ends for the staffing administrators and advanced end users.

Step 8 Cutover

Keep the Project Manager up to date by supplying them with the final training, parallel, and live dates. After a successful parallel period, it is time to start using TeleStaff exclusively in a production environment.

