



**ampelco**

R&D Software Department

4800 Curtin Drive, McFarland, WI USA 53558

[www.ampelco.com](http://www.ampelco.com)

## Role-Based Messaging Setup

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Contact: [insider@ampelco.com](mailto:insider@ampelco.com)

The optional Role-Based Messaging feature synchronizes Intelligent Series (IS) OnCall Scheduling with Ampelco Secure Messages. Role-Based Messaging enables Ampelco Secure Messages users to retrieve assigned resources for IS on-call schedules, on-call shifts, and on-call roles and send messages to everyone filling an role right from the Ampelco Secure Messages app. Users can choose to send a message under their name or their role.

Before Role-Based Messaging can be used in the Ampelco Secure Messages mobile app, supervisors must first configure Role-Based Messaging using IS Supervisor version 5.7 and the Ampelco Secure Messages Administration Web.

For more information about how to use Role-Based Messaging in the mobile app once it has been configured, see the *Role-Based Messaging in the Mobile App* white paper.

### Configuring Roles in IS Supervisor Directory Setup

In IS Supervisor version 5.7, a Secure Messages station and group can be connected to an IS Directory Subject to be used for Role-Based Messaging. Individual Secure Messages users can then be linked to listings, and secure roles can be assigned to on-call shifts.

### Connecting Secure Messages to an IS Directory Subject

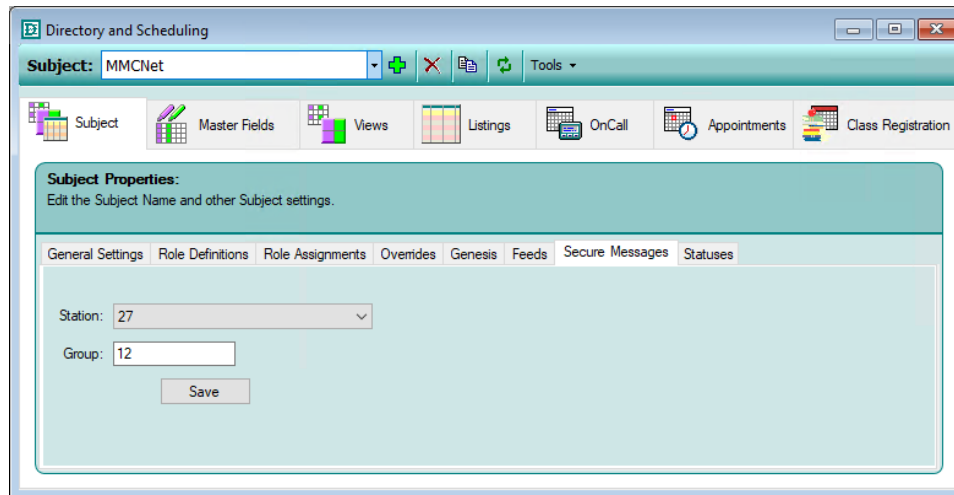
The Secure Messages tab is displayed in the Subject Properties in Directory Setup. The settings under the Secure Messages tab are used to connect an Ampelco Secure Messages station and group to an IS Directory Subject to be used for Role-Based Messaging.

**To access the Secure Messages settings in Directory Setup, click the Subject tab.**

The Subject Properties are displayed.

**Click the Secure Messages tab.**

The Secure Messages settings are displayed.



### Station

The Station menu is used to select the Amtelco Secure Messages Station ID that you want to connect to this IS Directory Subject. It must match a Station ID configured on the Secure Messages Connections page in System Setup.

**Select the Secure Messages Station ID number that you want to connect to this IS Directory Subject.**

### Group

The Group field is used to specify the unique group number of the Amtelco Secure Messages group that you want to connect to this IS Directory Subject. The group number can be found on the Group Properties page of the Amtelco Secure Messages Administration Web.

**Enter the group number of the Secure Messages group that you want to connect to this IS Directory Subject.**

### Connecting a Listing to a Secure Messages User

The Secure Messages Username setting under the Options tab in the Listing Properties is used to connect Amtelco Secure Messages users to IS Directory listings.

**To access the Listing Properties Options tab in Directory Setup, click the Listings tab.**

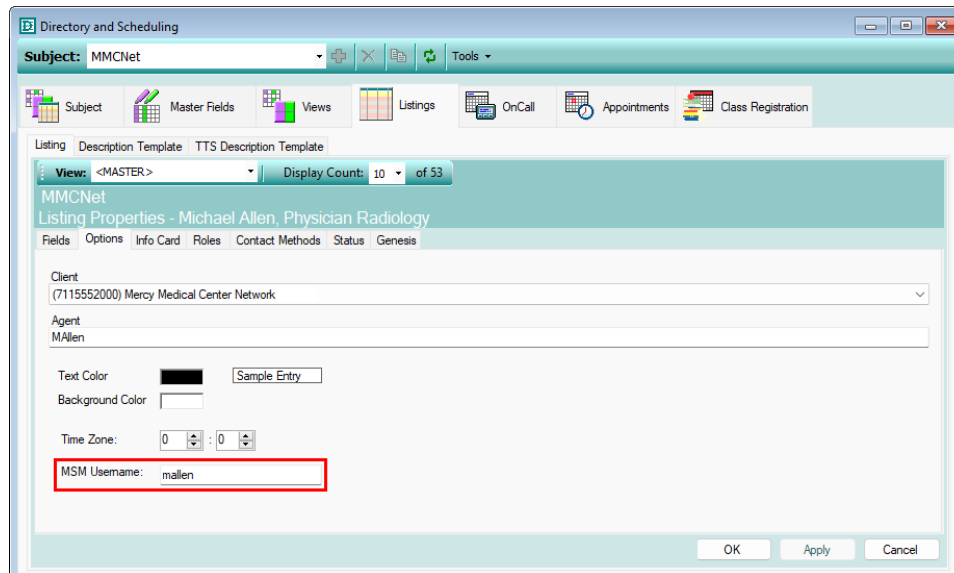
The Listings page is displayed.

**Select a listing and then click the Edit icon.**

The Listing Properties are displayed.

**Click the Options tab.**

The Options settings are displayed.



### MSM Username

The MSM Username setting is used to link the listing to an Amtelco Secure Messages user for use with Role-Based Messaging. This setting is only used with Role-Based Messaging and is separate from the Secure Messaging Contact Methods created under the Contact Methods tab.

**Enter the username of the Secure Messages user you would like to link to this listing for use with Role-Based Messaging.**

### Connecting an OnCall Schedule to Amtelco Secure Messages

The Secure Role and Post Worktime columns in the Required Roles Table in the Shift Definition Properties are used to connect an OnCall schedule to your Amtelco Secure Messages group.

**To access the Shift Definition Properties for an IS OnCall shift, click the OnCall tab.**

The OnCall page is displayed.

**Select a schedule from the Schedules list and then click the Edit Schedule icon  in the OnCall Schedule Toolbar.**

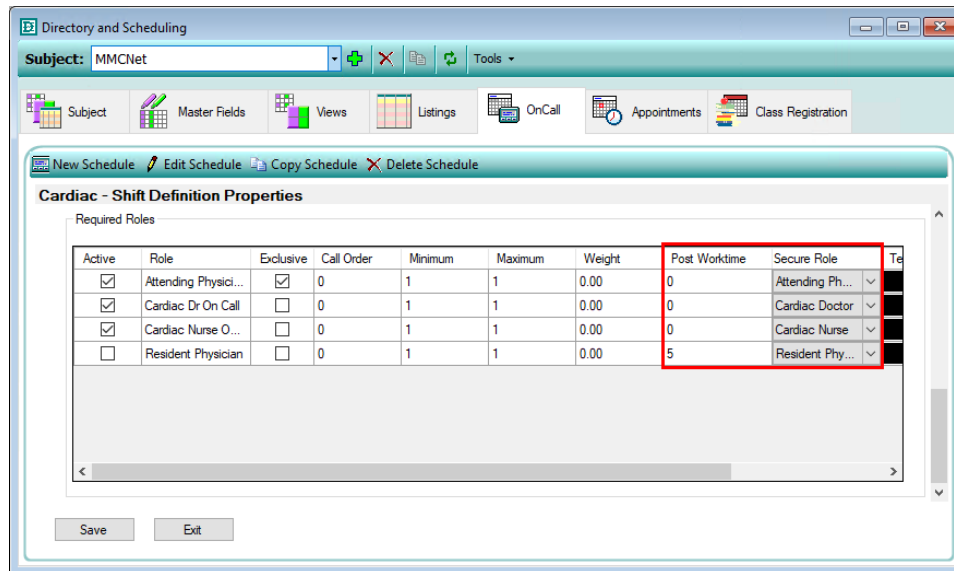
The Schedule Properties pane is displayed.

**Click the Shift Definitions tab on the OnCall Schedule Properties pane.**

The Shift Definitions page is displayed.

**Select the shift you want to edit and then click the Edit button.**

The Shift Definition Properties for the selected shift are displayed.



### Post Worktime

The Post Worktime value is used to assign the number of minutes that contacts filling this Secure Messages role have access to messages sent to the Secure Messages role after their shift has ended.

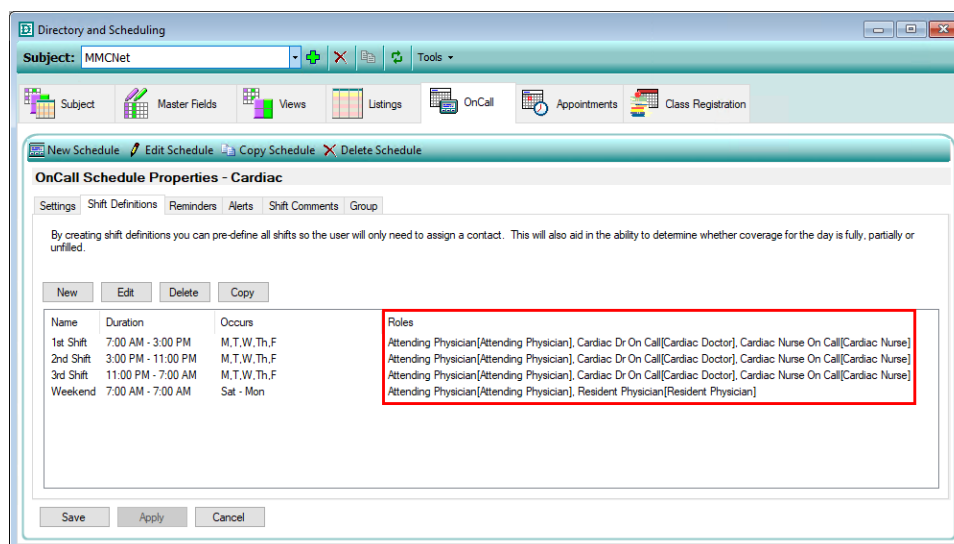
**Enter the number of minutes contacts filling this Secure Messages role should have access to messages sent to the Secure Messages role after their shift has ended.**

### Secure Role

The Secure Role column displays the Secure Messages role assigned to this IS OnCall role.

**Select the Secure Messages role that should be assigned to this IS OnCall role.**

Once the Secure Messages roles are assigned to IS OnCall roles, the Shift Definitions tab in the OnCall Schedule Properties displays the Secure Messages roles that have been assigned to each IS OnCall role.



The Secure Messages roles are displayed under the Roles column in brackets following the IS roles for that shift.

**Repeat the steps above for each shift to which you would like to assign Secure Messages roles.**

## Configuring Roles in the Amtelco Secure Messages Administration Web

Administrators can use the Amtelco Secure Messages Administration Web to add, delete, and rename roles, and view contacts currently assigned to roles. Roles can also be assigned to Contact Circles so they can be easily sorted in the Contacts screen in the Amtelco Secure Messages mobile app.

### Adding, Editing, and Deleting Roles

The settings under the Roles tab in the Groups properties are used to add, edit, and delete Amtelco Secure Messages roles.

**To access the Roles settings for a Secure Messages group, click the Groups command on the navigation menu.**

The Groups page is displayed.

**Click the Edit hyperlink in the same row of the table as the group's information.**

The Group Properties for that group are displayed.

**Click the Roles tab.**

The Roles settings for that group are displayed.

The screenshot shows the 'Group Properties - Mercy Medical Center Network (MMCNet)' interface. The 'Roles' tab is active, displaying a table of roles and a table of contacts. The 'Roles' table has a dark blue highlight on the row for '(7) Cardiac Dr. On Call'. The 'Contacts' table lists three contacts: Andrea Ward, David Darcy, and Angela Massey.

Roles	Contacts
(6) Attending Physician	Andrea Ward
(7) Cardiac Dr. On Call	David Darcy
(8) Cardiac Nurse On Call	Angela Massey
(9) Emergency Dr.	
(10) Emergency Nurse	
(11) Hospitalist	
(12) Lab Technician	
(13) Obstetrics Dr. On Call	
(14) Obstetrics Nurse On Call	

**To add a role, click the New icon. +**

The Role Properties dialog box is displayed.

**To edit a role, click the role that you want to edit and then click the Edit icon. ✎**


The Role Properties dialog box is displayed.



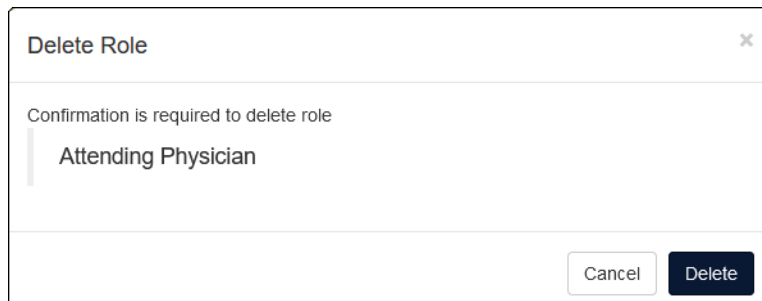
The Role Properties dialog box is shown. It has a title bar with 'Role Properties' and a close button. Below the title bar is a section labeled 'Name' with a text input field containing 'Attending Physician'. At the bottom right, there are two buttons: 'Cancel' and 'Save Changes'.

**Enter a new name for the role, then click the Save Changes button to save your changes.**

The role is displayed in the Roles list.

**To remove a role, select the role and then click the Delete icon.** 

The Delete Role dialog box is displayed.



The Delete Role dialog box is shown. It has a title bar with 'Delete Role' and a close button. Below the title bar is a message: 'Confirmation is required to delete role'. Underneath is a text input field containing 'Attending Physician'. At the bottom right, there are two buttons: 'Cancel' and 'Delete'.

**If you are sure you want to delete the role, click the Delete button.**

The role is removed from the Roles list.

## Adding Roles to Contact Circles

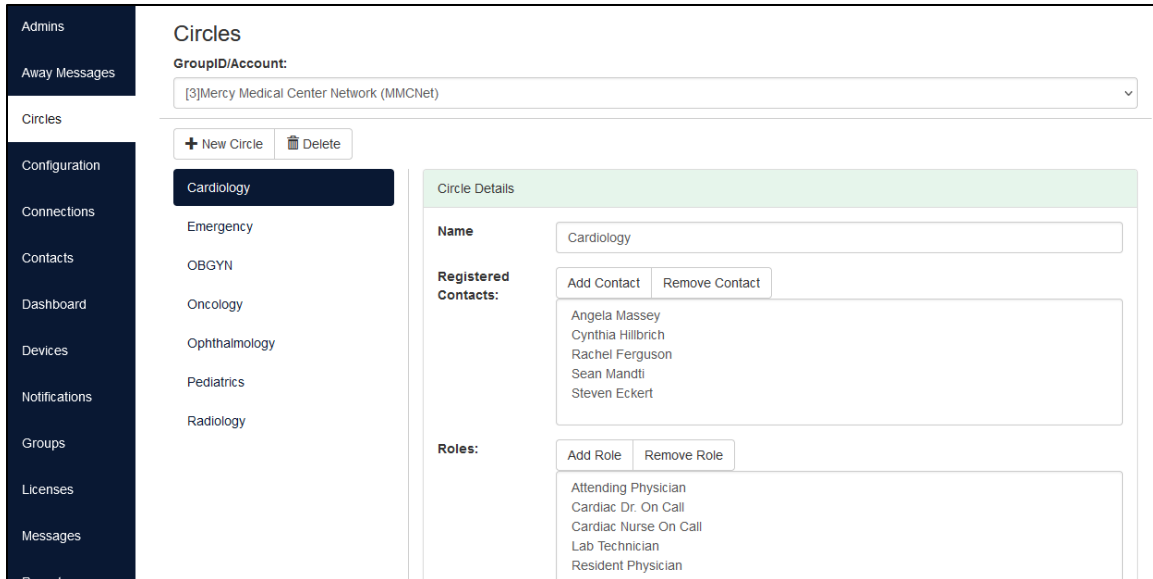
The Circles page is used to create, edit, and delete Contact Circles.

**To access the Circles page, click the Circles command on the navigation menu.**

The Circles page is displayed.

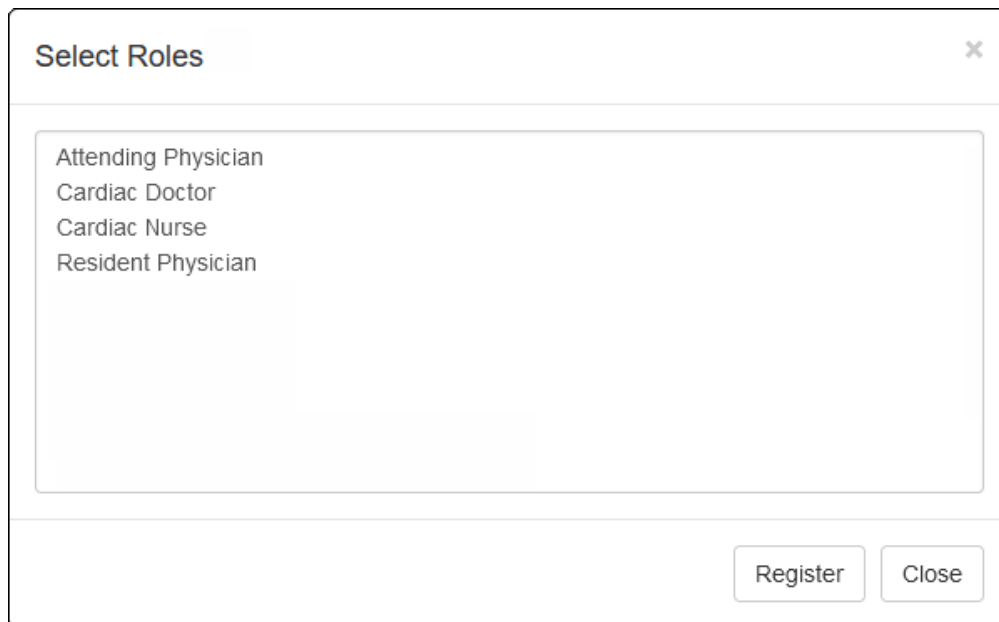
### Roles

When a role is added to a Circle, messages sent to the Circle will also be sent to the people who are on-call for the role.



To add roles to a Circle, click the Add Role button.

The Select Roles window is displayed.



Select the name of the role that you want to add in the Select Roles window.

- You can hold down the CTRL key to select multiple roles.
- You can hold down the SHIFT key to select a range of roles.

Click the Register button.

The selected roles are displayed in the Roles menu.

To remove roles from a Circle, select the name of the role that you want to remove in the Roles menu.

- You can hold down the CTRL key to select multiple roles.
- You can hold down the SHIFT key to select a range of roles.

**Click the Remove Role button.**

The selected roles are removed from the Roles menu.

**When you are finished editing the Circle Name and adding and removing contacts and roles, click the Save button to save your changes.**

A dialog box is displayed to confirm the changes were saved successfully.

**Requirements:**

- Amtelco Secure Messages Role-Based Messaging licenses
- Amtelco Secure Messages Server 7.0 or later
- Amtelco Secure Messages Administration Web 7.0.8641.3 or later
- Intelligent Series Supervisor 5.7.8788.3 or later

**Amtelco Part Number:** 232MP356 and 232MP357