

RollCall

Product Overview

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Criticall provides business-specific solutions addressing the need for Dynamic Interactive Communications for the Enterprise (DICE). RollCall is a member of the Criticall DICE offering family, drawing on the company's proven core "Nerv8" technology. It is primarily a two-way SMS text/email/instant-email solution, designed for rapid, interactive communication with individuals and Groups using devices that can handle receiving and sending such media types. While the same solution can handle outbound pager messages, two-way paging is not considered technically adequate for the business task. It is possible to incorporate pagers into your solution, by getting recipients to respond to pager messages received by calling back into the system by telephone. This is an additional costed-option for RollCall. Each customer implementation will come as a hosted, managed service, accessed securely via the internet. Each customer development will have *unique screens* and drop-down menus provided as part of the standard implementation. However, this document is designed to give the reader an indication of the look and feel of the application overall, and prompt their imagination to translate the basic template ideas into compelling applications, uniquely addressing their own pressing real-time business communication problems.

Business Applications Of Rollcall

RollCall makes it possible for enterprises to harness the power of modern, rapid communication technologies, to give them a more responsive, real-time operational capability. Wherever

an organisation needs to get in touch with groups of people (employees, contractors, suppliers, or customers) in a hurry, and would like to get rapid responses in minutes, all in an easy-to-view format, RollCall has a role to play.

The pressure for more rapid response, better quality information and integrated feedback from multiple sources for Decision Support is increasing in all areas of business, but is particularly felt in:

- ▶ Infrastructure Operations
- ▶ Helpdesks
- ▶ Call Centres
- ▶ Customer Relationship Management
- ▶ IT and Telecommunications infrastructure management
- ▶ Service Level Management
- ▶ Dispersed/Mobile Resource Management

Examples of how RollCall can help include:

- ▶ Ability to notify dispersed technical staff of the need for a conference call
- ▶ Ability to poll staff/contractors regarding time reaching/leaving site
- ▶ Ability to poll on-call staff to see which can respond to an incident
- ▶ Ability to get crisis management staff to confirm their ETAs to target site
- ▶ Ability to poll staff/contractors on whether they have received key health and safety briefings (eg. Tool-box talks

in Construction Industry)

- ▶ Ability to update key staff on vital issue progress and get them to confirm receipt of each message
- ▶ Ability to get mobile staff to confirm completion of each call, visit, or action in response to a message on the move to their mobile phone.

One Product – 4 Views

RollCall has four main functional areas: Administration, Call-Out, Reporting and PDA Access. The rest of this document covers the main features of each section.

Administration

The database behind RollCall needs to be populated with your correct data.

This data relates mainly to your knowledge of who needs to be contacted, what contact device details they have (pager, mobile phone, PDA) and which groups they belong to. You can access the Administration

functions over the web, so all you need is access to the internet. If you have the data stored electronically already, we can upload it for you as part of the one-time implementation of your system. Use of the system is intuitive and easy to pick up. Once you are logged in, a screen shot of what the main administration section will look like is given below:

Organisation Overview

ABC Finance

Ms John Smith

Recipients Groups Sites

Lookup

By User ID Navigation By Surname

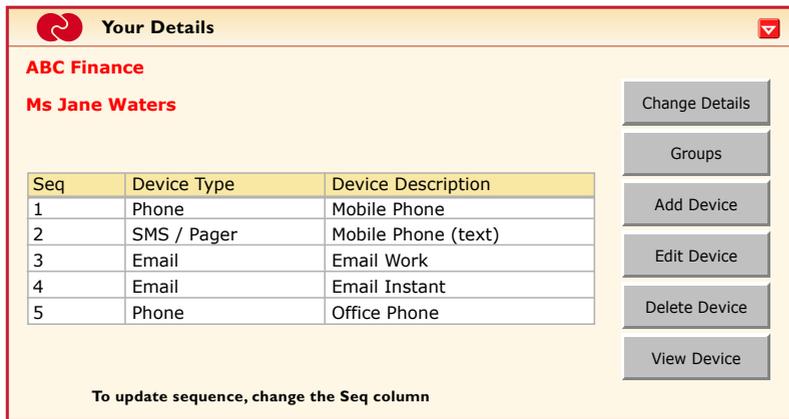
User ID	Title	First Name	Surname	Site
1230	Mr	Andrew	Watts	ABC
1231	Ms	Karen	Parker	ABC
1232	Ms	Joy	Smith	ABC
1233	Mr	Arnold	Spencer	ABC
1234	Mr	John	Smith	ABC
1235	Ms	Maureen	McGowen	ABC
1236	Mr	Benjamin	Dobson	ABC
1237	Ms	Kelly	Allans	ABC

<< Previous Next >>

Add Recipient
Edit Recipient
Delete Recipient
View Recipient
Contact Devices

The screen shown displays three different tabs: Recipients, Groups and Sites. The Recipients tab is the one highlighted, so all the information shown relates to data stored for Recipients. 'User ID' is the reference number that each recipient is individually identified by within the system. Title, first name and surname are self-explanatory. The column headed 'Site' can actually be given any title you wish. It may relate to information that is more relevant to you, such as whether the recipient is a Contractor, Staff Member, or Customer. Alternatively, it may relate

to Region of the Country, or specific Project name that the recipient is tied to. Navigating your way around the information is easy. For example, if you wanted to know what devices are linked to 'James Falla' from the above screen, you can do it in one of two simple ways. Either you would highlight his record by clicking on it, then click on the 'Contact Devices' grey button on the right of the screen shot. Or, you would simply double click on the record with his name on it, and a new window pops up with the device information on it, as shown in the screen shot below.



ABC Finance
Ms Jane Waters

Seq	Device Type	Device Description
1	Phone	Mobile Phone
2	SMS / Pager	Mobile Phone (text)
3	Email	Email Work
4	Email	Email Instant
5	Phone	Office Phone

To update sequence, change the Seq column

- Change Details
- Groups
- Add Device
- Edit Device
- Delete Device
- View Device

The entire system operates in a similar way, such that you can drill down into deeper layers of data behind each record, either by double-clicking on the record, or by highlighting it and clicking on the relevant grey button on the right hand side that performs the function that you want. This allows you to add new recipients, or edit/delete existing data in a simple and easy way.

The creation of a Group follows a similar pattern. Clicking on the Group tab, from the first screen shot shown above, instead of the Recipients tab, will bring up the following template window instead:



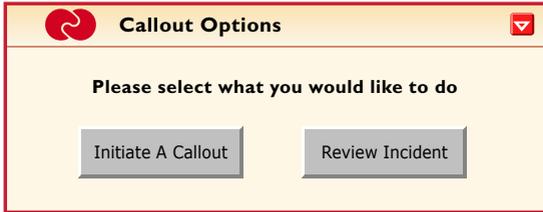
In this screen shot, three Groups have already been set up within the Administration section. Your own Groups will have names and Members that are relevant to you. You can have as many different Groups and Sub-Groups as you wish. For the Groups shown, you can highlight the Group, then click on any of the four grey action buttons on the right, enabling you to Edit, Delete, list Members, or perform a Group Enquiry on the chosen Group. Alternatively, you may Add a Group by clicking on the grey button of the same name. Once you have set certain parameters

for the Group (such as its name), you may then add Recipients to that Group, by selecting them from the list of Recipients already in your database. This selection function works in much the same way as you might select recipients for your emails from your own email address book.

Once the details of your Recipients and Groups have been properly stored in your database via the Administration section of RollCall, you can then use them for any subsequent Call-Outs you make, using the Call-Out section of the system.

Call Out

Once you have used the Administration section to populate the system with correct data, this data can be easily accessed using the Call-Out section of the system. The Call-Out section can be accessed via the web, a PDA, or can even be activated by remote telephone call, if properly configured for such usage. The following screens relate specifically to activation over the internet. After logging in correctly, you will be greeted by the following screen, giving you two options to choose from.



This gives you the choice of reviewing details of a previous call-out that has been made, or initiating a new call-out of your own.

The terminology used in the screen shot above is "incident", as this is a generic term that applies to all kinds of possible reasons for a call-out. However, you can equally use the words "Call-Out", or some other preferred term, like "Communication", or "Campaign", if such terms are more meaningful to your particular business application. Clicking on the Review button will take you to a screen showing the summary record for all previous Call-Outs. You can drill-down into the details behind each record by double-clicking on it in the usual way.

Incident No	Description	Date	Time	Status
1114	Send SMS / Email	01/01/2005	13:00	Cancelled
1113	Send SMS / Email	01/01/2005	13:00	Open
1112	Pre Recorded Message	01/01/2005	13:00	Open
1111	Pre Recorded Message	01/01/2005	13:00	Open
1110	Send SMS / Email	01/01/2005	13:00	Open
1109	Pre Recorded Message	01/01/2005	13:00	Open
1108	Send SMS / Email	01/01/2005	13:00	Cancelled
1107	Pre Recorded Message	01/01/2005	13:00	Open
1106	Pre Recorded Message	01/01/2005	13:00	Cancelled
1105	Create a Recording	01/01/2005	13:00	Cancelled
1104	Create a Recording	01/01/2005	13:00	Open
1103	Send SMS / Email	01/01/2005	13:00	Open
1102	Send SMS / Email	01/01/2005	13:00	Open
1101	Send SMS / Email	01/01/2005	13:00	Open
1100	Send SMS / Email	01/01/2005	13:00	Open
1099	Create a Recording with ETA	01/01/2005	13:00	Pending

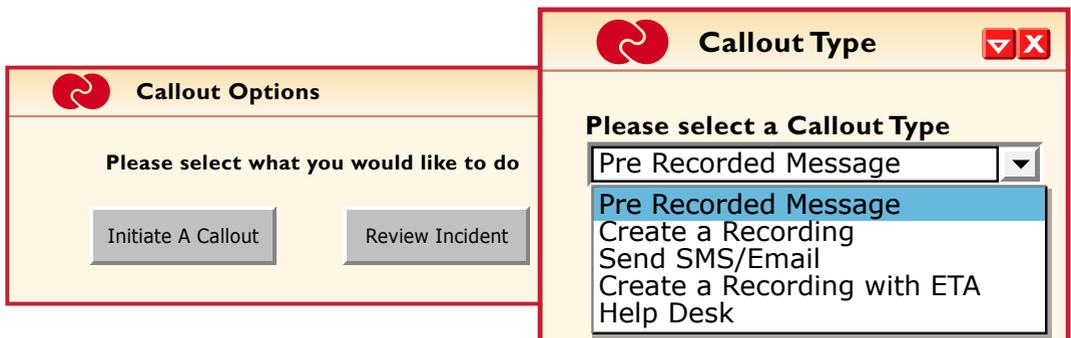
In the screen above, you can see call-outs are uniquely numbered. Call-outs numbered 324 to 335 inclusive are listed. The screen defaults to listing the most recent call-out events. Basic summary details shown on the same screen are the date and time that the call-out was initiated, plus its present status.

If, instead of opting to Review Incident, you chose to Initiate a Call-Out, you would be shown a screen which uniquely reflects your requirements. This will include the types of events that will be most meaningful to you. In their generic, default form, these RollCall screens will show a drop down menu, including the options of send email, send SMS message, as these are the main communication methods

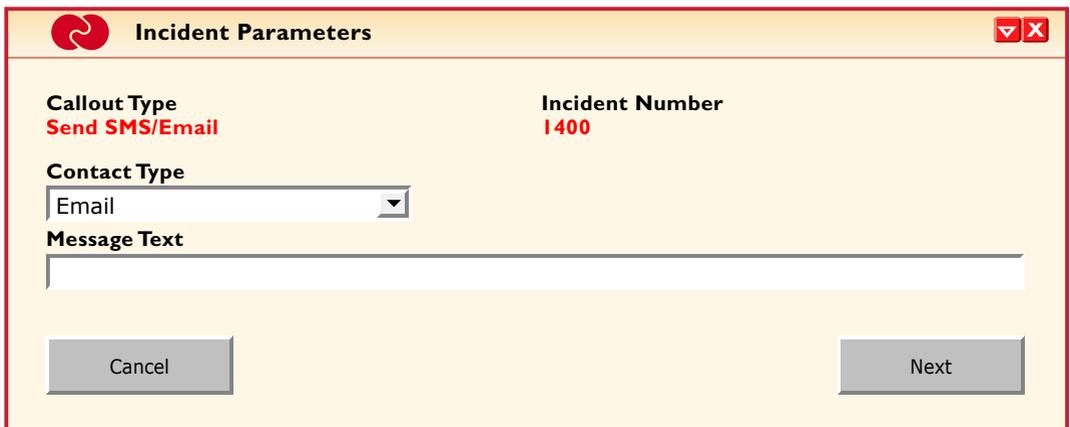
of the system. However, more options can be included, which indicate the type of call-out you wish to make.

This information would be shown on the Review Incident Summary screen shown immediately above.

The generic version of the Initiate Incident screen is shown below. Other options on the drop down menu will be those that you specify for your own version, but will include the likes of 'Send Email', and 'Send to all Devices' as default options.



When you click on OK, the 'Parameters' screen associated with that drop-down menu option will pop up. For example, you may have a drop down option that sends an SMS to all chosen recipients advising them that "there is a conference call in 10 minutes" on your standard number (eg 0845 XXX YYYY), which people must access using a security PIN number. Rather than having to type in the telephone and PIN numbers each time, these can be selected from their own drop down menus within the relevant Parameter screen, and will appear at the appropriate point in the outbound text. The simplest template for any RollCall screen will be as follows, where the full text message is typed in freehand each time:



Incident Parameters

Callout Type Send SMS/Email	Incident Number 1400
Contact Type Email	
Message Text	
Cancel	Next

Once you have typed in your message, you click on 'Next', which takes you to the screen where you select individuals and Groups that you want the message to go to. At this stage, the key Parameters that you have entered will be shown in Summary format, shown below in **red** writing on the left hand side of the screen shot. In this case, the customer had a variety of Parameters pre-set in the system, with drop down menus relating to *Location*, *Severity*, *Access to Area*, *Response Required* and *Who is Affected*. If you have typed in a complete message freehand, this will be shown on the Summary screen instead.

Add Recipients

Incident Details

Incident Number
1114

Incident Type
Send SMS / Pager

Select Parameters

Message Text
Application Failure. Please report to Central Control ASAP.

Contact Type
SMS / Pager

Recipients

Add Group

Add Individual

Remove

Change Parameters

Cancel

Next

On the right of the above screen shot, you can see the Add Group and Add Individual buttons. You can select both pre-set Groups and individuals

to be part of each callout. Each button takes you to a selection page of Groups, or the entire database of Individual recipients respectively.

When you are happy that all the right people and Groups are included, you click on the 'Next' button to take you to the final summary screen, an example of which is given below:

 **incident Confirmation**


Incident Details

Incident Number **1114**

Incident Type **Send SMS / Email**

Select Parameters

Message Text **Application Failure. Please report to Central Control ASAP.**

Contact Type **SMS / Pager**

Recipient

Name	Role
London - IT Dept	Group
Jason Biggs	
Lauren Farnsworth	

Callout Type

Test **Real Emergency**

Initiate Callout



You can see that two individuals and a Group called London IT Dept have been selected, as shown on the panel on the right hand side of the screen. Clicking on the grey button with the telephone icon in it, to the bottom right of the screen, will initiate the Call-Out, with the designated message, to the specified Group and Individuals. Prior to taking such action, the system allows you to

specify whether the event is a 'Real Emergency', or a 'Test'. The messages sent out in each case can be different. For example, a Test Message would normally be prefaced with the word "Test" ahead of your given message, possibly with the footer "Take no action" as well. This functionality allows you to perform tests of the system in live environments, without confusing the user community.

Once the Call-Out is initiated recipients can respond to messages they are sent in real-time. You can also watch messages going out and responses coming in as they happen, online. In the Monitoring screen shot below, you can see that Walter Robinson and John Smith have responded to the message sent, while attempts to reach Justine McDuff and Andrew Farlow have so far failed. The SMS responses from Walter Robinson and John Smith could include whatever extra summary

information you specify for your own version of RollCall. For example, it could be left flexible, depending on the original message. Examples might be an ETA, an answer to an options question sent in the original text message (eg A, B, C or D...), a score out of 10, or even a word, or short message in reply.


Callout Status
⌵ ✕

Incident Number: 1114 **Description:** SMS/Text

Incident Status: Open **Incident Date:** 01/01/2005 **Time Initiated:** 13:00:00

Contact List

Latest Log Entry

Successes

Latest Log Entry

Walter Robinson - Acknowledged the message

John Smith - Acknowledged the message

Failed to Contact

Latest Log Entry

Justine McDuff - Retry exceeded tel. 07000123459

Andrew Farlow - Retry exceeded tel. 07000123457



Cancel Callout

Close

PDA Access

All the screen shots so far have related to use of the system over the internet. The same functions can be accessed using a PDA, Blackberry or Smart Phone (with web-browsing functionality built in), with the views adjusted to suit the smaller screen sizes common to these type of devices.

A sample screen shot based on each of these devices is shown below:



Reporting

The last of the four system views is that which can be obtained from the Reporting suite. The Reporting suite covers both Administration and Call-Out data. It enables you to generate reports that can be viewed online, printed off, or extracted as Excel spreadsheets for further analysis and manipulation.

These reports can save you time and hassle, by quickly showing you the information you need, or by printing off a full paper copy of your data for audit and business resilience purposes. A sample of the powerful reporting options is shown in the screen shot below. It shows a template for Call-Out Reports.

Once the specific Call-Out incident ID is chosen (number 374 in the example below), the system can be made to list all relevant data for that Call-Out, or it can be made to show just the items most of interest. In the example below, all options are ticked to be included, but the user can de-select any, or all of the items, represented by different colours in the report. For example, for a large Call-Out, you may

just want to print off a list of those people who have positively responded, so that you take matters further with them. Alternatively, if the Call-Out was intended to take a full roll-call of Recipients, follow up action can be taken with just those who have not responded – ie the Recipients whose records are highlighted in red.

Administration Reports Callout Reports

Refresh Report

Summary :
Summary of calls made during a particular incident

Incident List :

10 Mar 2004	10:05	-381	Send a Test Message
10 Mar 2004	10:02	-380	Send a Typed Message
10 Mar 2004	9:57	-379	Send a Typed Message
6 Mar 2004	12:57	-377	Send a Test Message
5 Mar 2004	14:12	-376	Send a Typed Message
5 Mar 2004	14:12	-375	Send a Test Message
5 Mar 2004	14:14	-374	Send a Typed Message

Groups Selected:

Non Group Members:

Critical11 Chiswick
Critical11 Test
Monday Call

Hints:

- Highlight the groups you want to include.
- Use the shiftkey to select a range of groups.
- Use the Ctrl key to select specific groups.

Include Lines:

<input type="checkbox"/>	<input checked="" type="checkbox"/> General information	<input type="checkbox"/>	<input checked="" type="checkbox"/> Awaiting response
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Success	<input type="checkbox"/>	<input checked="" type="checkbox"/> Failed to contact
<input checked="" type="checkbox"/> Show only newest response row			

The Bottom Line

RollCall makes use of high speed, low cost communication channels, like SMS text, pager and emails. It is assumed that people in most key roles in an organisation already have such personal devices.

Now, thanks to RollCall, enterprises can grasp the opportunity to exploit technologies that are already in place and in use by the workforce, by customers and by suppliers for their own corporate good.

The great attraction of RollCall is that for as little as £6,000 a year, organisations like your own can harness technologies which are already in place and paid for, to make your enterprise more agile and responsive to operational demands.

To find out more about RollCall can visit us at: www.criticall.co.uk.



criticall limited

3 chiswick park, 566 chiswick high road,
london, W4 5YA

tel: 0870 351 4908

fax: 0870 351 4907

web: www.criticall.co.uk

email: info@criticall.co.uk

Criticall Limited

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Criticall Limited
3 chiswick park,
566 chiswick high road,
london, W4 5YA

www.criticall.co.uk