

# UNDERSTANDING ROLLCALL A USER'S GUIDE

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THE NAVY LEAGUE OF CANADA • ALBERTA DIVISION

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#### INTRODUCTION TO THIS DOCUMENT

#### What is RollCall?

RollCall is a secure, web-based database that was developed solely for Alberta Division Navy League corps by PSICORP. RollCall is accessible through a single web interface and can be accessed from any internet browser. RollCall is also compatible with tablets and mobile devices.

RollCall is always under development and new modules will continually be added.

## **Purpose**

The purpose of this document is to give an overview of the administrative functions within the system and provide step-by-step instructions for the system processes.

#### **Format**

This document contains separate sections for each administrative function, and each function will have a detailed step-by-step guide through the system process (including screen shots).

As new modules are added, this document will be updated and provided to all required users. It's vital to ensure that the most recent user guide is being used. Any old user guides should be destroyed.

#### Access

To log in to the application, you must enter a user name and password. Your login information is provided by PSICORP.

The application is located at <a href="https://rollcall.abnavyleague.ca/pulse/">https://rollcall.abnavyleague.ca/pulse/</a>

#### **Feedback**

If any changes are needed to this document or if there are any questions relating to the documented processes, please forward changes and/or inquiries to:

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## **FEATURES**

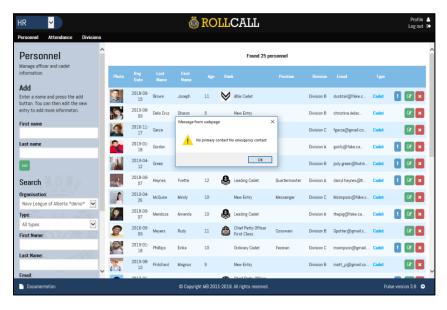
### **Corps Nominal At-A-Glance**

When you log in to RollCall and click on the HR module, it will take to you to a Welcome page. Click on Personnel, and it will take you to the corps nominal roll. This at-a-glance corps nominal has the following information:

- Photo
- Registration Date
- Last Name
- First Name
- Age
- Rank
- Position
- Division
- Email
- Type (Cadet, Officer, or Staff Cadet)

## **Missing Personnel Information**

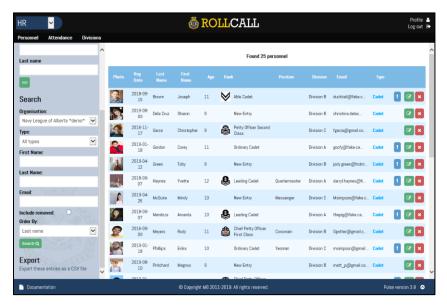
When you see an exclamation point on a personnel record, it means that they are missing some vital information. Click on the exclamation point to see what's missing.



#### **Search Function**

On the left-hand side of the screen, you'll see a search function. You can use this to search any of your personnel based on:

- Type (Cadet, Officer, or Staff Cadet)
- First Name
- Last Name
- Email

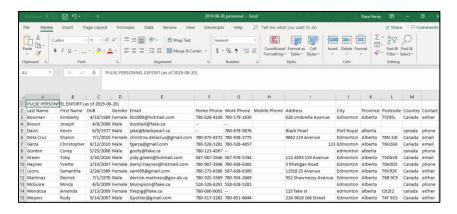


With this function, you can also choose to include cadets who are no longer active, by checking the "**Include removed**" box

# **Export Function**

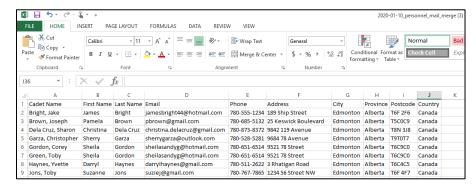
On the left-hand side at the very bottom, you'll see a link that says, "Export these entries as a CSV file". This provides you with an excel spreadsheet of a variety of different information; including:

- Personnel contact and demographic information
- Emergency contact information
- Medical information



## **NEW!** Mail Merge Function

On the left-hand side at the very bottom, you'll see a link that says, "Export mail merge CSV file". This provides you with an excel spreadsheet of the cadet's name, phone number, and address, in the case of requiring a personalized communication to cadets.



## **PERSONNEL**

# **Accessing the HR Module**

1. Log into RollCall



2. Click on the HR module

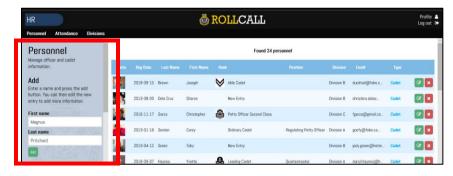


3. Click on the Personnel module



# **Adding A New Cadet**

1. Enter the cadet's first and last name on the left-hand side and click "Add"



2. A record is now created for the cadet and will appear on the screen in alphabetical order by last name

Scroll down to find the cadet you just added. Click the green "Edit" button on the cadet's record to add their information



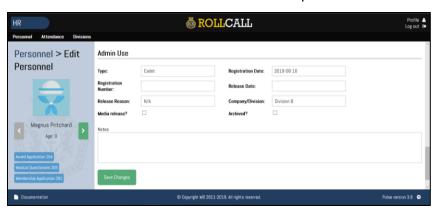
- 4. The main personnel screen will open
- 5. Enter the cadet's middle name in the associated field (if they have one)
- 6. Enter the cadet's preferred name in the associated field (if they have one)
- 7. Enter the cadet's date of birth in the associated field. The date must be entered in the following format: YYYY-MM-DD
  - If you enter a date of birth that is outside of the regulated age, you will get an error message. Please review and correct the date of birth, or review the cadet's package to see if they are not the correct age.
- 8. Select the appropriate gender for the cadet in the associated field



- 9. Scroll down to the "Medical Details" section
- 10. Under the "Allergies" text box, enter any allergies that the cadet has (i.e. food allergies)
- 11. Under the "**Medical Conditions**" text box, enter any pertinent information relating to any medical concerns the cadets have (i.e. ADHD)
- 12. Under the "**Medications**" text box, enter as much detail as possible about the name, dosage and timing of any medication(s) the cadet is on
- 13. Under the "**Health Number**" text box, enter the cadet's Alberta Health Care Number in the following format: 12345-6789



- 14. Scroll down to the "Admin Use" section
- 15. Under the "Type" field, it will default to "Cadet". Do not change it
- 16. Under the "**Registration Date**" field, enter the date the cadet registered with your corps in the following format: YYYY-MM-DD
  - This should be the date that the cadet and parent(s) completed and signed the NL202
- 17. Under the "Company/Division", select the division that the cadet will be in
- 18. Check the box labeled "Media release" if the parent has initialled Section 5 of the NL202



- 19. Click "Save Changes"
- 20. Click on the "Contacts" tab.



21. This is where you can add any contacts associated with the cadet. Add the first and last name of one of the cadet's parents or guardians and click "**Add Contact**"



22. A record is now added. To add more information to the parent or guardian, click on the green "**Edit**" button next to the parent or guardian's name



23. Once the screen opens, add all the parent's contact information



- 24. Under "Admin Use", select the contact's relationship under "Type"
- 25. If this is the cadet's primary contact, check the "Primary" box
  - When you select a primary contact, it will show the cadet's contact information as the primary contact person's information
- 26. If this is the cadet's emergency contact, check the "Emergency" box

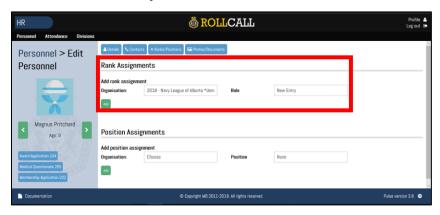


27. Click "Save Changes"

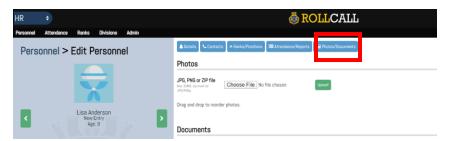
- 28. Click on *Edit Personnel* to go back to the contact screen. Repeat the above steps for any additional contacts.
- 29. Click on "Ranks/Positions"



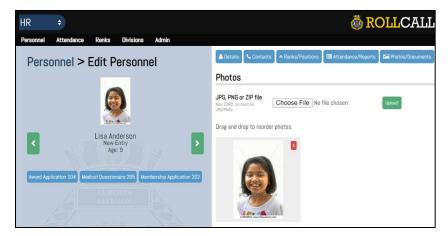
30. Under the "Rank Assignment" section, select your corps from the "Organization" field, and select "New Entry" from the "Rank" field, and then click "Add"



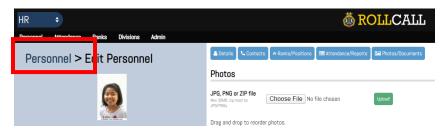
31. Click on "Photo/Documents"



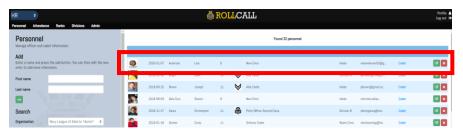
32. To add a photo of the cadet, click "**Choose File**" and find the location of the photo, then press "**Upload**"



33. Click on Personnel

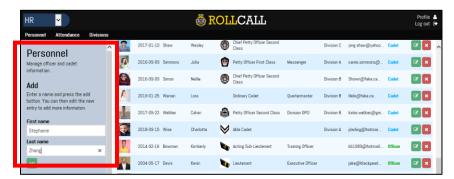


34. Scroll down and you'll see the record of the new cadet

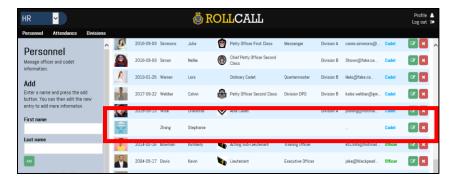


# **Adding a New Officer**

1. Enter the officer's first and last name on the left-hand side and click "Add"



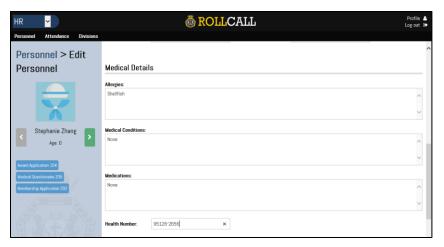
- 2. A record is now created for the officer and will appear at the bottom of the screen
- 3. Scroll down to find the officer you just added. Click the green "**Edit**" button on the officer's record to add their information



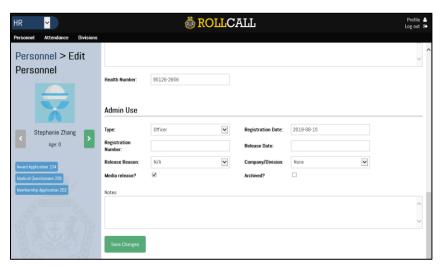
- 4. The main personnel screen will open
- 5. Enter the officer's middle name in the associated field (if they have one)
- 6. Enter the officer's preferred name in the associated field (if they have one)
- 7. Enter the officer's date of birth in the associated field. The date must be entered in the following format: YYYY-MM-DD
  - The system will give you a warning that this person is too old. This is because the system default is to add a cadet. You'll change this further down
- 8. Select the appropriate gender for the officer in the associated field



- 9. Scroll down to the "Medical Details" section
- 10. Under the "Allergies" text box, enter any allergies that the officer has (i.e. food allergies)
- 11. Under the "**Medical Conditions**" text box, enter any pertinent information relating to any medical concerns the officer has (i.e. ADHD)
- 12. Under the "**Medications**" text box, enter as much detail as possible about the name, dosage and timing of any medication(s) the officer is on
- 13. Under the "**Health Number**" text box, enter the officer's Alberta Health Care Number in the following format: 12345-6789



- 14. Scroll down to the "Admin Use" section
- 15. Under the "Type" field, select "Officer"
- 16. Under the "**Registration Date**" field, enter the date the officer registered with your corps in the following format: YYYY-MM-DD
  - This should be the date that the officer completed and signed the NL101
- 17. Under the "Company/Division", leave it as "None"
- 18. Check the box labeled "Media release"



- 19. Click "Save Changes". It will now take you back to the main screen
- 20. Click on the "Contacts" tab



- 21. This is where you can add any contacts associated with the officer. To ensure the officer's information shows up correctly in the main screen, you'll need to add the officer as a contact
- 22. Add the officer's first and last name in the respective fields and click "Add Contact"



23. A record is now added. To add the officer's information, click on the green "**Edit**" button next to the officer's name



24. Once the screen opens, add the officer's contact information under the "Contact Details" section



- 25. Under "Admin Use" section, select "Other" under the "Type" drop-down
- 26. Select the "**Primary**" check box. This ensures that the officer's information shows up on the main screen as their own information

27. Do not select the "Emergency" check box



- 28. Click "Save Changes"
- 29. Click on Edit Personnel to go back to the contact screen



30. The officer's record is now updated



31. To add the officer's emergency contact information, enter the first and last name of the person in the respective fields and click "Add Contact"



32. The record for the person is now created. Click on the green "**Edit**" button to add their information



33. Once the screen opens, add the person's contact information under the "Contact Details" section



- 34. Under "Admin Use" section, select "Other" under the "Type" drop-down
- 35. Do not select the "Primary" check box
- 36. Select the "Emergency" check box if this person is the officer's emergency contact



- 37. Click "Save Changes"
- 38. Click on Edit Personnel to go back to the contact screen



39. You'll see that the officer now has an Emergency Contact listed



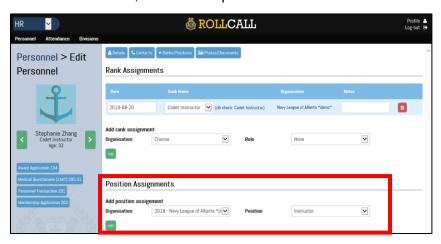
40. Click on "Ranks/Positions"



41. Under the "Rank Assignment" section, select your corps from the "Organization" field, and select "Cadet Instructor" from the "Rank" field, and then click "Add"



- 42. Under the "Position Assignment" section, select your corps from the "Organization" field, and select the officer's position from the "Position" field, and then click "Add"
  - At minimum, the officer's position should be entered as "Instructor"



43. Click on "Photo/Documents"



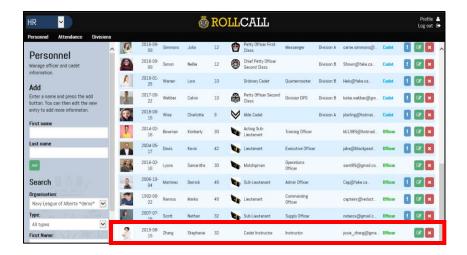
44. To add a photo of the officer, click "**Browse**" and find the location of the photo, then press "**Upload**"



45. Click on Personnel

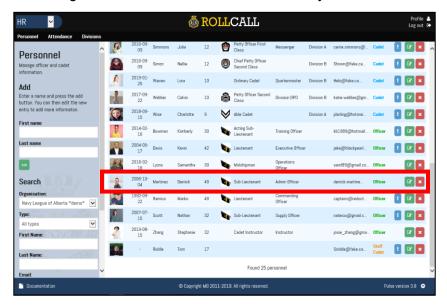


46. Scroll down and you'll see the record of the new officer

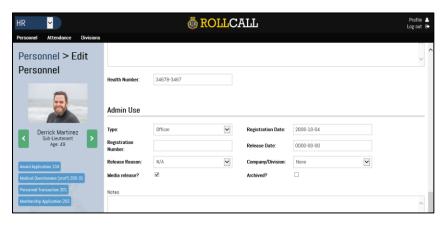


# **Adding a Warrant Number for an Officer**

1. Click the green "Edit" button for the officer who you want to add the Warrant Number for



2. Scroll down to the "Admin Use" section



3. Under the "Registration Number" field, enter the officer's Warrant Number



4. Click "Save Changes"

## **Adding a New Staff Cadet**

1. Enter the staff cadet's first and last name on the left-hand side and click "Add"



- 2. A record is now created for the staff cadet and will appear on the list in alphabetical order
- 3. Scroll down to find the staff cadet you just added. Click the green "**Edit**" button on the staff cadet's record to add their information

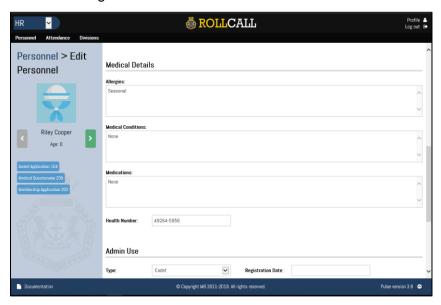


- 4. The main personnel screen will open
- 5. Enter the staff cadet's middle name in the associated field (if they have one)
- 6. Enter the staff cadet's preferred name in the associated field (if they have one)
- Enter the staff cadet's date of birth in the associated field. The date must be entered in the following format: YYYY-MM-DD

- The system will give you a warning that this person is too old. This is because the system default is to add a cadet. You'll change this further down.
- 8. Select the appropriate gender for the staff cadet in the associated field

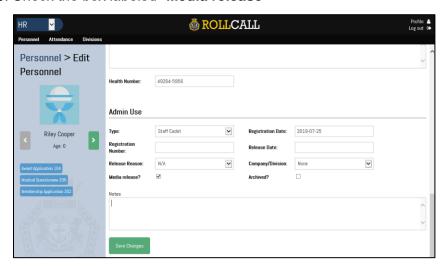


- 9. Scroll down to the "Medical Details" section
- 10. Under the "**Allergies**" text box, enter any allergies that the staff cadet has (i.e. food allergies)
- 11. Under the "**Medical Conditions**" text box, enter any pertinent information relating to any medical concerns the staff cadet has (i.e. ADHD)
- 12. Under the "**Medications**" text box, enter as much detail as possible about the name, dosage and timing of any medication(s) the staff cadet is on
- 13. Under the "**Health Number**" text box, enter the staff cadet's Alberta Health Care Number in the following format: 12345-6789



- 14. Scroll down to the "Admin Use" section
- 15. Under the "Type" field, select "Staff Cadet"
- 16. Under the "**Registration Date**" field, enter the date the staff cadet registered with your corps in the following format: YYYY-MM-DD
  - This should be the date that the staff cadet completed and signed the NL207
- 17. Under the "Company/Division", leave it as "None"

18. Check the box labeled "Media release"



- 19. Click "Save Changes". It will now take you back to the main screen
- 20. Click on the "Contacts" tab



- 21. This is where you can add any contacts associated with the staff cadet. Normally this will be the parent with whom the staff cadet resides
- 22. Add the parent's first and last name in the respective fields and click "Add Contact"



23. A record is now added. To add the parent's information, click on the green "**Edit**" button next to the parent's name

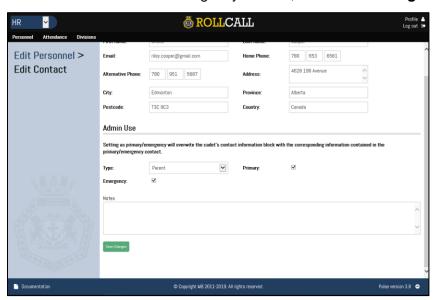


24. Once the screen opens, add the parent's contact information under the "Contact Details" section

- Under the "Email" field, add the staff cadet's email instead of the parent's email
- Under the "Home Phone" field, add the staff cadet's phone number instead of the parent's phone number
- Under the "Alternative Phone" field, add the parent's phone number



- 25. Under "Admin Use", select the contact's relationship under "Type"
- 26. If this is the staff cadet's primary contact, check the "Primary" box
  - When you select a primary contact, it will show the staff cadet's contact information as the primary contact person's information
- 27. If this is the staff cadet's emergency contact, check the "Emergency" box



- 28. Click "Save Changes"
- 29. Click on Edit Personnel to go back to the contact screen



30. You'll see that the staff cadet now has a Primary and/or Emergency Contact listed



31. Click on "Ranks/Positions"



- 32. Under the "Rank Assignment" section, select your corps from the "Organization" field, and select the staff cadet's rank from the "Role" field, and then click "Add"
  - There are Sea, Air, and Army cadet ranks to choose from



33. Click on "Photo/Documents"



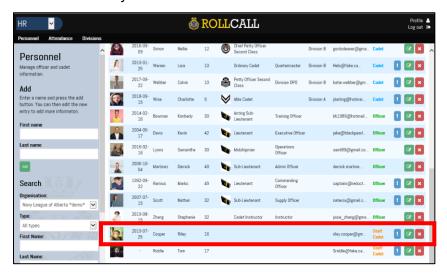
34. To add a photo of the staff cadet, click "**Browse**" and find the location of the photo, then press "**Upload**"



35. Click on Personnel

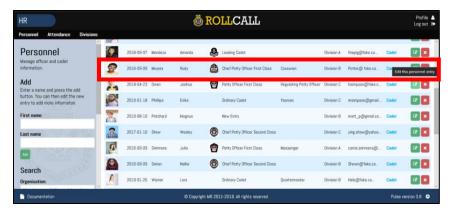


36. Scroll down and you'll see the record of the new staff cadet

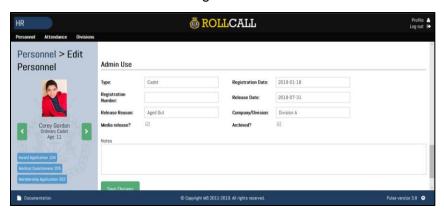


#### **Strike Off/Archive a Cadet**

1. Find the record of the cadet that is being released and click the green "Edit" button



- 2. Scroll down to the "Admin Use" section
- 3. Enter the cadet's release date in the "Release Date" field
- 4. Under "Release Reason", select the reason why the cadet left the corps
  - The reasons listed are based on the reasons in the NL206. If you select "Other" and want to provide more details, use the "Notes" text box
- 5. Check the box that says "Archived"
  - This will ensure that the cadet's record remains in the database but is not seen in the Active cadets listing



6. Click "Save Changes"

## **ATTENDANCE**

# **Accessing the Attendance Module**

1. Log into RollCall



2. Click on the HR module



3. Click on the Attendance module



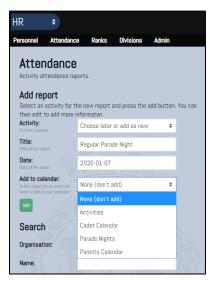
# **Add an Activity**

In this section, you'll add any cadet event that you have during the year. This includes your regular parade nights, extra training nights, camps, and any other activity where you will need to track cadet attendance.

1. On the left-hand side of the screen, you'll see the "Add Report" section



- 2. Under "Activity", leave it as the default ("Choose later or add as new")
- 3. Under "**Title**", put in the name of your event (i.e. Regular Parade Night, Winter Camp, Fleet Days, etc.)
- 4. Under "Date", enter the date of the event
- 5. If you would like to add it to your calendar, select the appropriate calendard under the "Add to calendar" drop-down menu.



- 6. Click "Add"
- 7. The event has now been added to the main report screen

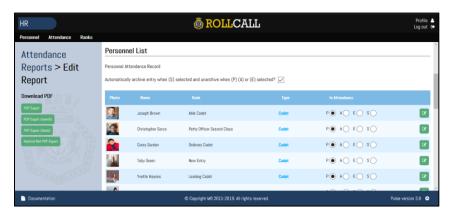


# **Take Attendance for an Activity**

Select the green "Edit" box for the activity that you'd like to take attendance for



- 2. Check the "**Mandatory**" check box if this event will be counted towards any attendance medals or awards
- 3. Scroll down to "Personnel List"



- 4. Under each cadet, indicate if they were present (P), AWOL (A), excused (E), or stricken off strength (S).
  - As you make the appropriate selection, the attendance list automatically saves it.

#### **Attendance Reports**

Once your attendance is complete for the event, you can run a report based on the attendance. On the left-hand side, you'll see four reports you can run. Here's a breakdown of each one:

- **PDF Export:** This provides you with a PDF document of the attendance for that specific event/night. Total attendance numbers are at the bottom of the sheet.
- PDF Export (month): This provides you with a PDF document of the monthly
  attendance for whatever month this event is in. If a cadet joined OR was stricken off
  strength mid-way through the month, the attendance will show "N/A" for the dates prior
  to their registration date or after their SOS date. This also shows the monthly attendance
  percentage for each cadet.

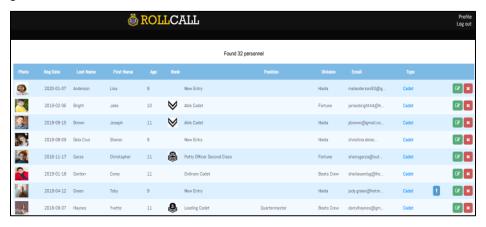
- PDF Export (blank/all personnel): This provides you with a blank monthly PDF document to take your monthly attendance. This includes all personnel, including staff cadets and officer.
- PDF Export (blank/cadets by division): This provides you with a blank monthly PDF document to take your monthly attendance and is divided up by divisions.
- **PDF Export (blank/staff only):** This provides you with a blank monthly PDF document to take the monthly attendance of your corps officers.
- **Nominal Roll PDF Export:** This provides you with the NL203 (NLCC Nominal Roll) for that specific night/event.

## **NEW!** Attendance by Cadet

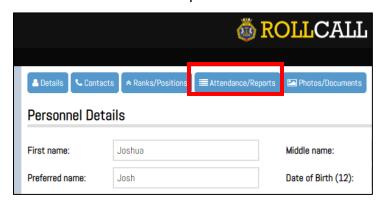
1. Click on Personnel



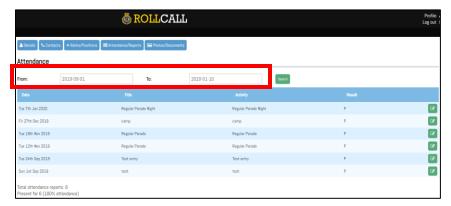
2. Select the record of the cadet that you want an attendance record for, and click the green "Edit" button



3. Click on the Attendance/Reports tab



4. Change the "**From**" and "**To**" dates to find the cadet's personal attendance percentage for that certain period of time



5. You can also update the cadet's attendance by clicking on the green "Edit" button

## **DIVISIONS**

RollCall has three default divisions set up. You can edit the names and add new ones as necessary.

# **Accessing the Divisions Module**

1. Log into RollCall



2. Click on the HR module



3. Click on the Divisions module



# **Changing Division Names**

1. Click the green "Edit" button to edit the name of a Division



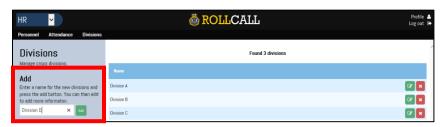
2. Under the "Name" field, enter the preferred name of the Division



- 3. Click "Save Changes"
- 4. Repeat the above steps to change the names of the other divisions

# **Adding a New Division**

1. On the left-hand side of the screen, enter the name of the new division and click "Add"



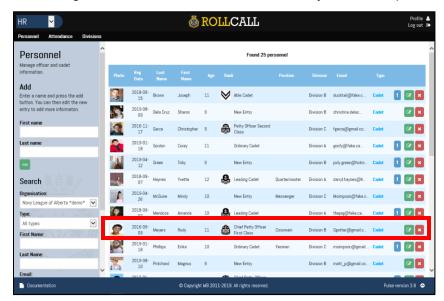
2. The division will now appear in the list



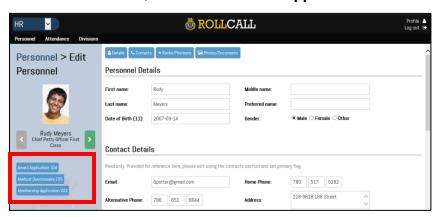
## **REPORTS**

# **NL104 – Award Application**

1. Click the green "Edit" button for the cadet who you want to print off the form for



2. On the left-hand side, click on the "Award Application 104" button



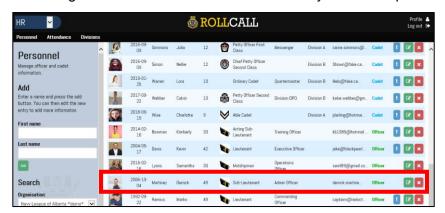
3. The PDF document will appear in a new window or open as a PDF



4. Print off the document and fill out any necessary fields

#### **NL201 – Personnel Transaction**

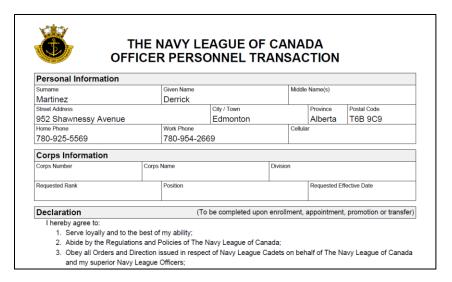
1. Click the green "Edit" button for the officer who you want to print off the form for



2. On the left-hand side, click on the "Personnel Transaction 201" button



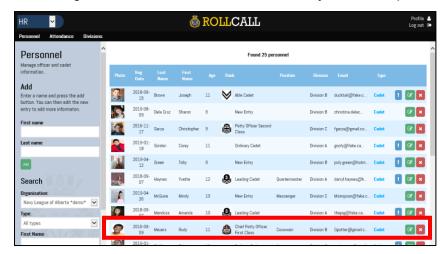
3. The PDF document will appear in a new window or open as a PDF



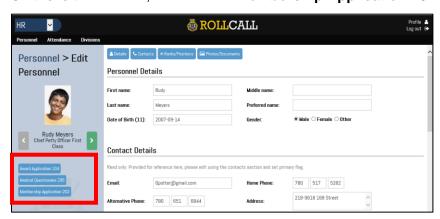
4. Print off the document and fill out any necessary fields

## **NL202 – Membership Application**

1. Click the green "Edit" button for the cadet who you want to print off the form for



2. On the left-hand side, click on the "Membership Application 202" button



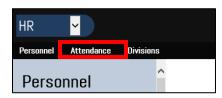
3. The PDF document will appear in a new window or open as a PDF



4. Print off the document and fill out any necessary fields

#### **NL203 - Nominal Roll**

1. Select the Attendance tab



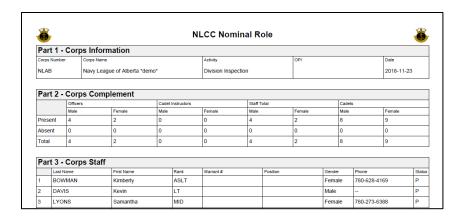
2. Select the event that you need the document for



3. On the left-hand side of the screen, select "Nominal Roll PDF Export"

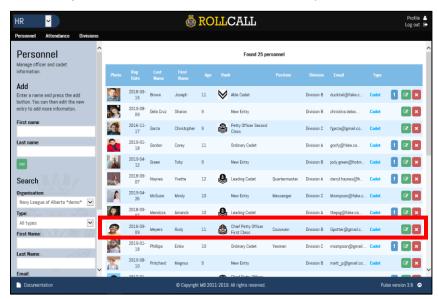


4. The PDF document will appear. Print as necessary.

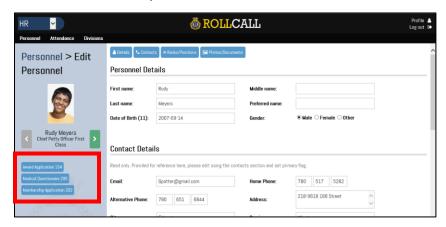


#### **NL205 – Medical Questionnaire**

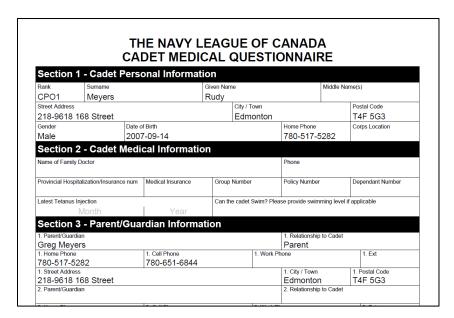
1. Click the green "Edit" button for the cadet who you want to print off the form for



2. On the left-hand side, click on the "Medical Questionnaire 205" button



3. The PDF document will appear in a new window or open as a PDF



4. Print off the document and fill out any necessary fields

# **NEW!** NL206 - Inspection Report

1. Select the Admin tab



2. Click on the "Inspection Report 206" button



3. The PDF document will appear. Print as necessary.