



# Configuring Shift Log



## In 5 Easy Steps

	View in Case Management	Locked after publishing workbook	Visible until closed	Appears in Single Shift Only
Log Entry	✗	✓	✗	✓
General Entry	✗	✗	✓	✗
Case Entry	✓	✗	✓	✗

## 00

### PLANNING

#### Security Roles:

- Workspace security - View, edit, delete
- Workbook security - view

#### Entry types:

- Log
- General
- Case

#### Workbook structure:

- Menu
- Pages

### SITES AND SHIFTS

## 01

- Configure in Server Management
- Used in Workbooks for the Shift Picker
- Set a Default Site
- For each site, set a Default Shift Pattern
  - Specify the start time of the first shift
  - Shift length: 6, 8, 12, or 24 hrs
  - Do you need a Disabled shift?

## 02

### NAMED LISTS

- Configure in Server Management
- Used for drop-down selection lists where Field type is List
- Can be used for grouping in Workbooks e.g. by Topic
- Items are sorted alphabetically, or you can manually specify the sort order.

### FIELDS

## 03

- Configure in Server Management
- Equivalent to custom properties
- Fields have a data type, each data type can have different formatting options
- Fields are assigned to a Form
- Fields can be used in more than one Form
- Fields cannot be changed or deleted
- Some Fields are reserved for system use

## 04

### FORMS

- Configure in Server Management
- Defined by type of entry and Fields assigned to the Form
- System Fields cannot be removed but can be hidden
- Can be shared between entry components and Workbooks
- Different entry types have different system fields
- You can assign default values to a Field for that Form
- Fields can be sorted and hidden for Table View and Dialog View
- Dialog View - affects the entry dialog shown to operators
- Table View - affects the tables on the Workbook pages

### WORKBOOKS

## 05

- Configure in Explorer
- Add one or more pages per Workbook
- Add entry components to pages
  - Apply filters if using shared Forms
- Separate page for Handover Report
  - Use Dynamic height on the grid layout
  - Ensure browsers can print background colour
- In Workbook Settings specify:
  - Shift Pattern
  - Handover Report page - shows the print button
  - Workbook privileges (need Explorer Admin level)