



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

SITES, SHIFTS & SWINGS

01

Security Roles:

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

Entry types:

- Log
- General
- Case

Workbook structure:

- Menu
- Pages

- 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?
- Set Swing Patterns and Reporting Periods

02

NAMED LISTS

FIELDS

03

- 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.

- 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

WORKBOOKS

05

- 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

- 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 (Report – Grid)
 - Use Dynamic height on the grid layout
 - Ensure browsers can print background colour
- In Workbook Settings specify:
 - Shift or Swing Pattern
 - Handover Report page - shows the print button
 - Workbook privileges (need Explorer Admin level)