



SHIFTCONNECTOR[®] io

Manual for Administrators

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History and confidentiality

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1 Foreword

1.1 About this manual

This manual provides instructions to administrators on how to use Shiftconnector®.

We recommend that every prospective administrator complete the KeyUser training. This is a basic requirement for admin training.

Administrator rights allow users to manage Shiftconnector® and configure it as needed.

1.2 Helpcenter – case-based help

In addition to this administrator's manual, Shiftconnector® also provides a Helpcenter. Various use case are described there, e.g. how to create a new user or edit forms.

You can also send support requests and manage them in Helpcenter.

To access the Helpcenter, open your browser and navigate to <https://eschbach.zendesk.com>.

If you have not yet submitted a support request, continue with section *1.2.1 Registering in Helpcenter*.

If you have already submitted a support request (also by e-mail), please proceed with section *1.2.2 Requesting a password*.

1.2.1 Registering in Helpcenter

If you have not previously sent a support request to us, you need to register first.

Click on <https://eschbach.zendesk.com> on the **Register** page.

Now enter your first and last name as well as your e-mail address and click on **Register** again.

After registering you will receive a welcome e-mail to confirm your e-mail address and set a password.

After setting a password you can log into the Shiftconnector®io Helpcenter with your e-mail address and your password.

If the message “This e-mail address is already registered to another user” appears on the login page, it means that your e-mail address is already registered with us.

In this case, follow the instructions in section *1.2.2 Requesting a password*.

1.2.2 Requesting a password

If you have already submitted a support request, your e-mail address is already stored with us. In this case you only need a password to log into the Helpcenter.

Click on 'Request Password' on the <https://eschbach.zendesk.com> page.

Now enter your e-mail address. Check your inbox and follow the instructions in the e-mail.

If you continue to experience problems with your registration, please e-mail us at support@eschbach.com.

2 Managing users

2.1 General

In the *User Account* menu item you can view the user list. You can create new users and edit existing ones. You can also create or update multiple users by uploading an Excel file. And conversely you can download the user list as an Excel file.

The screen is divided into three sections.

1. Toolbar
2. Users
3. User data

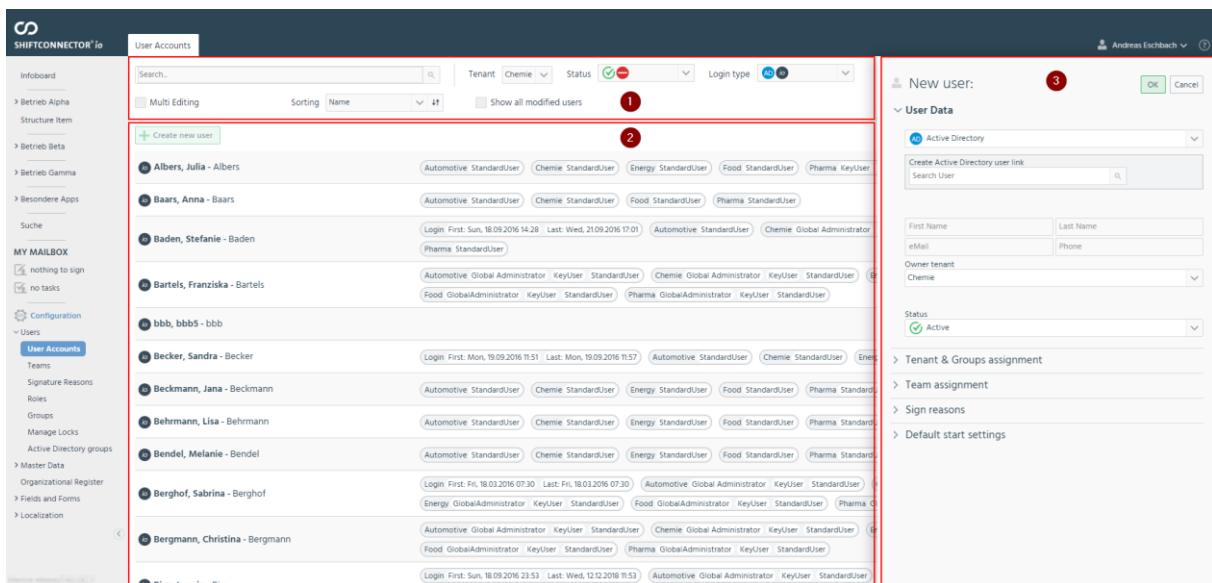


Figure 2:1: Overview of user management

2.2 Toolbar

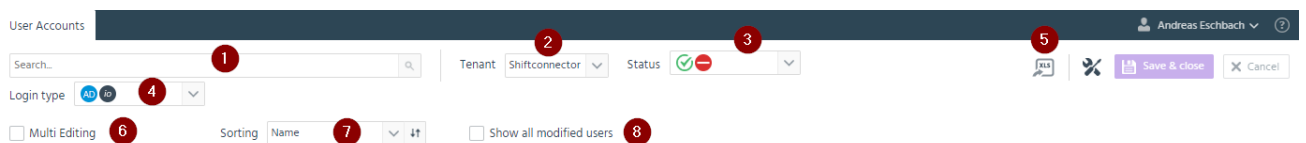









Figure 2:2: User management – toolbar

#	Name	Description
1	Search field	The search field allows you to search for a specific user by entering the name. It updates with each letter typed. You can search by first name, last name and the groups.
2	Tenants	Here you can limit the search to the users of a tenant selected by you. In addition to the tenants, you can also select from two other options. You can filter out the users that have not been assigned to a group for a tenant during registration. These users are marked with the  icon in the line. You can also filter users that were not assigned to a tenant during registration. The tenant specified when logging in is selected by default.
3	User status	You can filter the user list by user status. Select one or more statuses from the combo box that you want to display. Users with a green icon  have the status <i>Active</i> . Users with a grey icon  have the status <i>Inactive</i> and are only visible in the user management menu item. Users with a red icon  have been locked because they entered the wrong password too many times. The status types <i>Active</i> and <i>Locked</i> are selected by default.
4	Login types	You can filter the user list by the login type of the users. Each user is assigned to a login type. Active directory users are identified by the  icon, and 'io identity' users with the  icon.
5	XLS-Export	The Excel export button allows you to download the user list as an Excel file to your computer.
6	XLS-Import	The button for importing Excel spreadsheets allows you to add multiple users in a single step. Load a preformatted Excel file into the Shiftconnector®.
7	Multi editing	By selecting the <i>Multi editing</i> checkbox you can select multiple users and then edit them simultaneously. In the checkbox that now also appears, set a checkmark next to the users you wish to edit.
8	Sorting	Select the criteria according to which the user list should be sorted from the drop-down list. The list can be sorted according to the following criteria: <ul style="list-style-type: none"> • Last name • Login type • First login date • Last login date The button with the arrows  changes the order from ascending to descending or vice versa.
9	Edited users	Mark this checkbox in order to only see users in the list that you have edited or created.

2.3 Users

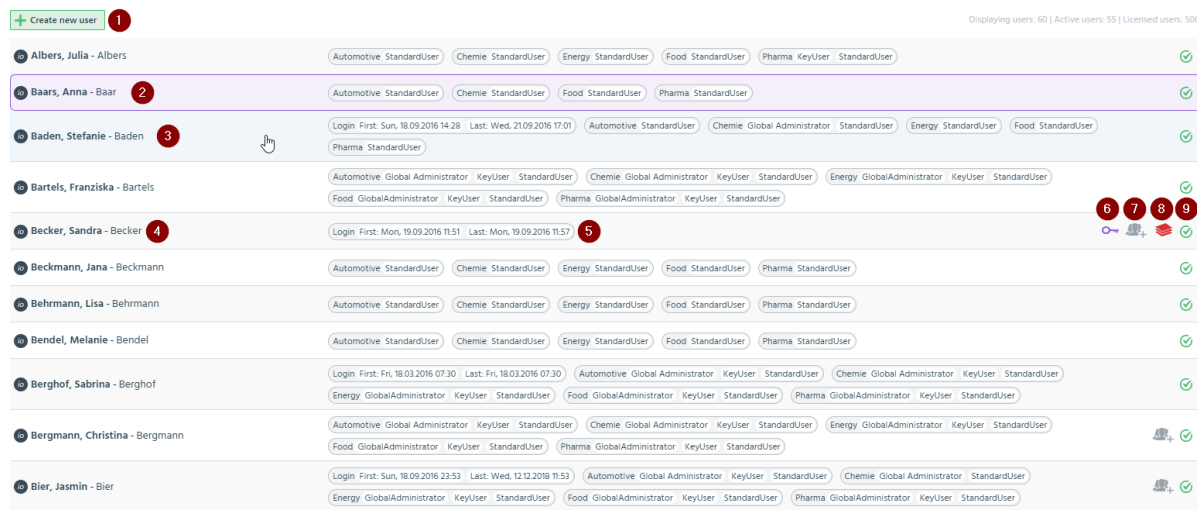




Figure 2:3: Users

#	Name	Description
1	Create new user	Press this button to create a new user.
2	Edited user	The line of an edited but not saved user is highlighted with a purple background. The purple background disappears as soon as the save button is pressed.
3	Mouse focus	If you move the mouse over the user list, the user line on which the mouse pointer is hovering is highlighted in light blue.
4	Name of user	The name of the user with the assigned login type.
5	User tags	Each user line has a number of tags in the middle of the screen. These tags indicate when the user has first and last logged into Shiftconnector®. You can also see to which groups the respective user is assigned in the company's tenants.
6	User must change password	The key signal indicates that the created user must enter a new password when logging in for the first time. This function can be specified when creating the user.
7	Not assigned to a team	If the user is not assigned to a team, this icon  is shown at the end of the line.
8	Not assigned to a group	This icon  appears if the user was not assigned to a tenant or group.
9	User status	The status of a user is displayed to the right of the user line. The possible statuses are described in the previous section under 2.2.

2.4 Creating a new user

To create a user, you must first click on the *New user* button to open the details pane on the page. This area is organized as an accordion with five items. This is where you enter all user data and affiliations.

2.4.1 User data

In the *User data* section you can enter all personal information about the user.

The screenshot shows a 'New user' form with an accordion menu. The 'User Data' section is expanded and contains the following fields:

- 1**: A dropdown menu for user source, currently set to 'AD Active Directory'.
- 2**: A search box labeled 'Create Active Directory user link' with a search icon.
- 3**: 'First Name' text input field.
- 4**: 'Last Name' text input field.
- 5**: 'eMail' text input field.
- 6**: 'Phone' text input field.
- 7**: 'Owner tenant' dropdown menu, currently set to 'Shiftconnector'.
- 8**: 'Status' dropdown menu, currently set to 'Active' with a green checkmark icon.

Below the 'User Data' section, there are four collapsed accordion items:

- > Tenant & Groups assignment
- > Team assignment
- > Sign reasons
- > Default start settings

Figure 2:4: Entering user data

#	Name	Description
1	Login types	Select which login type the newly created user can use.
2	Active Directory	You can only see this field if you are licensed to use active directory with Shiftconnector®. You can then search for the user via this field by entering his or her name in the AD. If the user is found, all registered information of the user is automatically transferred to the respective fields.
3	First name	First name of the new user (required).
4	Last name	Last name of the new user (required).
5	E-mail address	E-mail address of the new user (optional).
6	Phone number	Phone number of the new user (optional).
7	Tenants	Assign the user to a tenant.
8	User status	Select the status for the user. The options are <i>Active</i> , <i>Inactive</i> , <i>Locked</i> .



It is not possible to register a user both for AD authentication and IO identity!

2.4.2 Tenant & group assignment

In the second section you can assign one or more groups to the user. These groups and their respective rights were configured by you in section 12 Access rights. These will then appear under *Points 1 and 3*. They can be assigned to the users.

The screenshot shows a 'New user' configuration window. At the top right are 'OK' and 'Cancel' buttons. Below is a 'User Data' section. The main section is 'Tenant & Groups assignment', which is expanded. It contains three numbered steps:

- 1**: Three checkboxes for 'Global Administrator', 'KeyUser', and 'StandardUser'.
- 2**: A 'Tenant' dropdown menu with 'Shiftconnector' selected.
- 3**: The same three checkboxes as in step 1.

 Below this section are three collapsed sections: 'Team assignment', 'Sign reasons', and 'Default start settings'.

Figure 2:5: Assigning a user to groups

#	Name	Description
1	Global administrator	Here you can assign the group of the global administrator to the user. If you select this for a tenant, it is automatically assigned for all other tenants! Please refer to section 14 <i>Managing groups</i> for information on how to configure these groups.
2	Tenant	With this drop-down list you can display the respective available groups for the selected tenant and assign them to the user as described under point 3.
3	Groups	Set one of more checkmarks for the groups intended for the user.

2.4.3 Assigning a user to teams

In the third accordion you can assign the user to the configured teams of the own tenant. Global administrators can be assigned to teams for all tenants.

The screenshot shows a 'New user' configuration window. At the top right are 'OK' and 'Cancel' buttons. Below are sections for 'User Data', 'Tenant & Groups assignment', and 'Team assignment'. The 'Team assignment' section is expanded, showing a 'Tenant' dropdown menu with 'Shiftconnector' selected (marked with a red circle '1'). Below the dropdown is a list of checkboxes for team assignments: 'Day-Team', 'Maintenance', 'Shift 1', 'Shift 2', 'Shift 3', and 'Shift 4'. The 'Shift 1' checkbox is marked with a red circle '2'. Other sections like 'Sign reasons' and 'Default start settings' are collapsed.

Figure 2:6: Assigning a user to team

#	Name	Description
1	Tenant	With this drop-down list you can display the respective available teams for the selected tenant and assign them to the user as described under point 2. Please refer to section 4.4 <i>Managing teams</i> on how to create teams.
2	Teams	Select the teams for which the user is intended.

2.4.4 Selecting signature reasons

Select the signature reasons for which the user is authorised.

Figure 2:7: Assigning signature reasons to users

#	Name	Description
1	Tenant	With this drop-down list you can display the respective available signature reasons for the selected tenant and assign them to the user as described under point 2. Please refer to section 6 <i>Managing signature reasons</i> on how to create signature reasons.
2	Signature reasons	All created signature reasons are displayed with a checkbox. If you want to allow the user to use a signature reason, check the box next to the signature reason.

2.4.5 Default settings for welcome screen

In the fifth accordion you can configure the default start settings for when the user logs in.

The screenshot shows a 'New user' configuration form with several sections. The 'Default start settings' section is expanded and contains three items:

- 1** Tenant: A dropdown menu with 'No mandator selected' as the current selection.
- 2** Language: A dropdown menu with 'No language selected' as the current selection.
- 3** Show welcome screen

Figure 2:8: Start settings

#	Name	Description
1	Tenant	The tenant that is pre-selected on the welcome screen.
2	Language	The language that is pre-selected on the welcome screen.
3	Show welcome screen	If this box is not checked, the user will not be shown the welcome screen when logging in. Instead, Shiftconnector® is opened directly. This is only possible when all necessary default settings are available.

2.5 Editing users

Previously created users can be managed and their configuration changed. Changing is just as easy as creating a new user. Simply select the user you wish you modify ¹ and click the *Edit* button in the detailed view that opens ²:

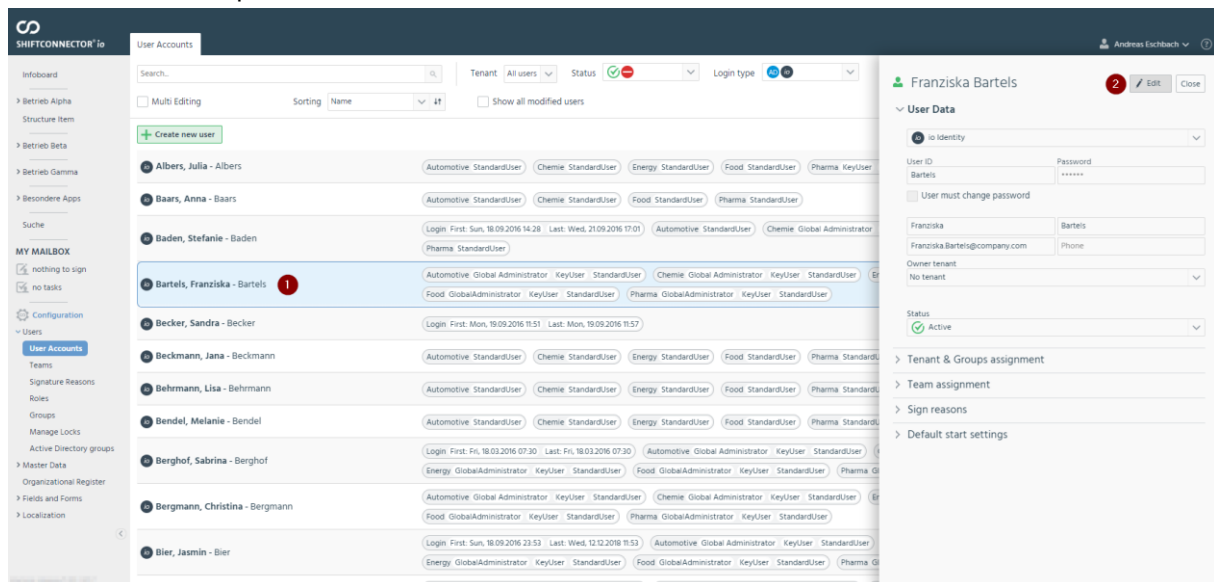


Figure 2:9: Editing users

Users are changed similarly to how they were initially created. Therefore, please refer to section 2.4 *Creating a new user*.

3 Managing active directory groups

Under the active directory group assignment menu item you can make assignments to Shiftconnector groups. A user that has been assigned active directory group rights will automatically receive the active directory login.

The screen is divided into three sections:

1. Toolbar
2. Groups
3. Group data

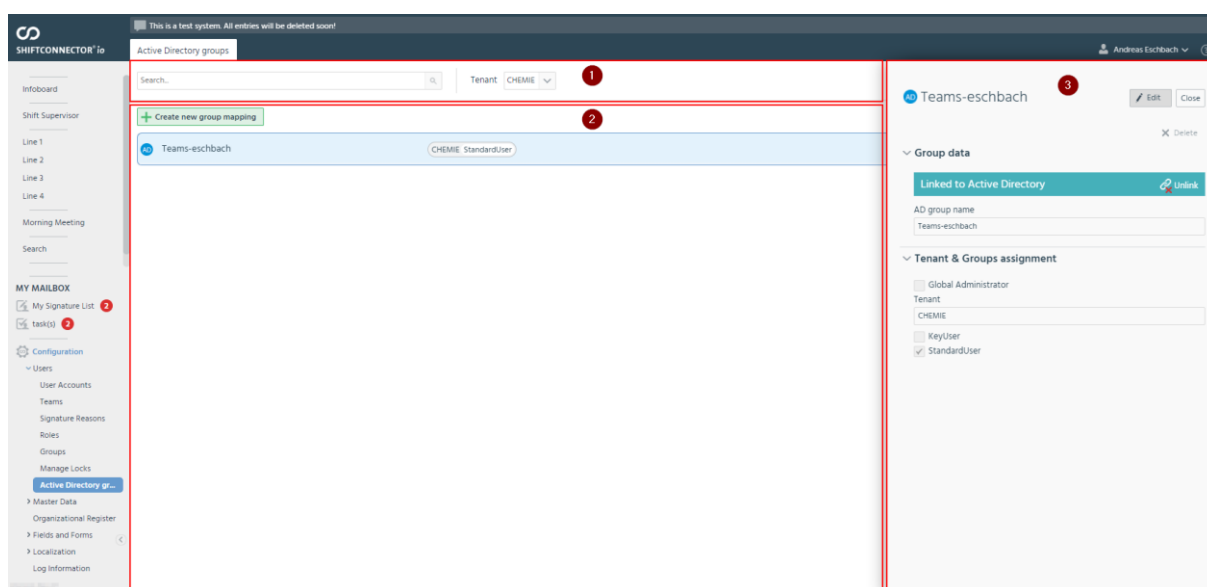


Figure 3.1: Overview of managing active directory groups

3.1 Toolbar



Figure 3.2: Active directory groups – toolbar

#	Name	Description
1	Search field	Here you can search for a specific group. Please refer to section 29 <i>Ad-hoc search</i> for information on how the search field works.
2	Tenants	Here you can limit the search to one of your selected tenants. The tenant specified when logging in is selected by default.

3.2 Groups

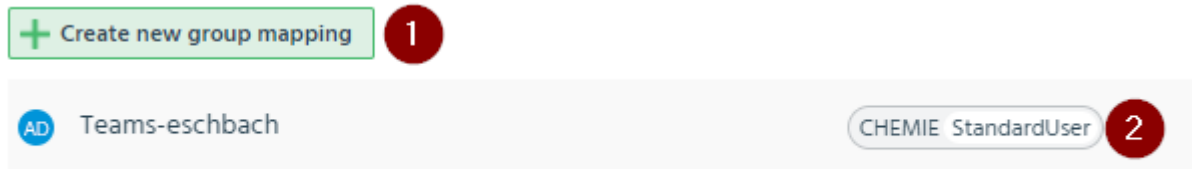


Figure 3.3: Active directory group list

#	Name	Description
1	Create new group mapping	Press the button to open the input area.
2	Groups	List of groups with the respective assignments.

3.3 Group data

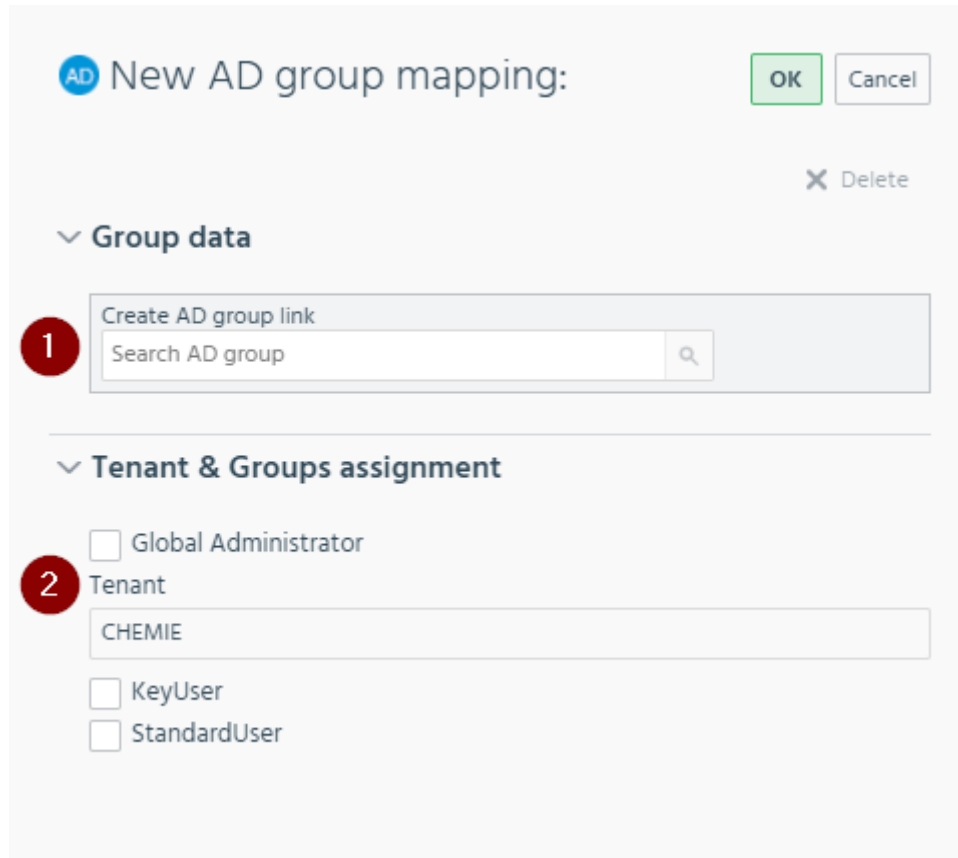


Figure 3.4: Linking an active directory group

#	Name	Description
1	Search field	Search for the AD group simply by typing the name of the group into the search field.
2	Tenants and groups	Select the Shiftconnector group to which the AD group is to be linked.

4 Managing teams

4.1 General

Under the *manage Teams* menu item you can see all teams of a tenant. You can create new teams and edit existing teams. You can also delete teams or remove members from a team.

The screen is divided into three sections:

1. Toolbar
2. Teams
3. Team details

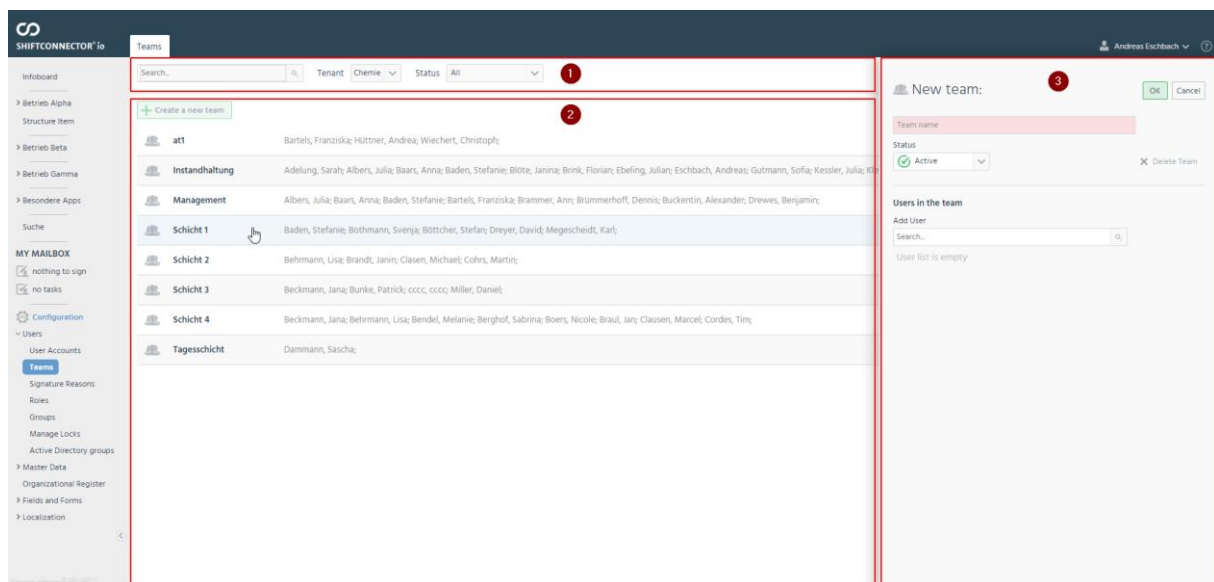


Figure 4.1: Manage teams overview

4.2 Toolbar

The toolbar allows you to efficiently search for a team or team member. Two filters and a search field are available.



Figure 4.2: Manage team toolbar

#	Name	Description
1	Search field	Here you can search for a specific team or a user who is a member of the team. Please refer to section 29 <i>Ad-hoc</i> search for information on how the search field works.
2	Tenants	Here you can limit the search to the teams of a tenant selected by you. The tenant specified when logging in is selected by default.
3	Team status	You can filter the team list by the status of the teams. Select one or more statuses from the combo box that you want to display. Teams with a green icon have the status <i>Active</i> . Teams with a grey icon have the status <i>Inactive</i> . Both status types are selected by default.

4.3 Teams

The team list gives you an overview of the existing teams and their team members. Click on the team line to edit it.



Figure 4.3: Teams

#	Name	Description
1	Create team	Press the button to open the team data area. Here you can name the team, select the status and add team members.
2	Teams	List of teams with the respective members.

4.4 Creating a new team

To create a team, you must first click on the *New team* button to open the details pane on the page. In the detailed view you can delete the team or change the status and name. You can also remove and add team members.

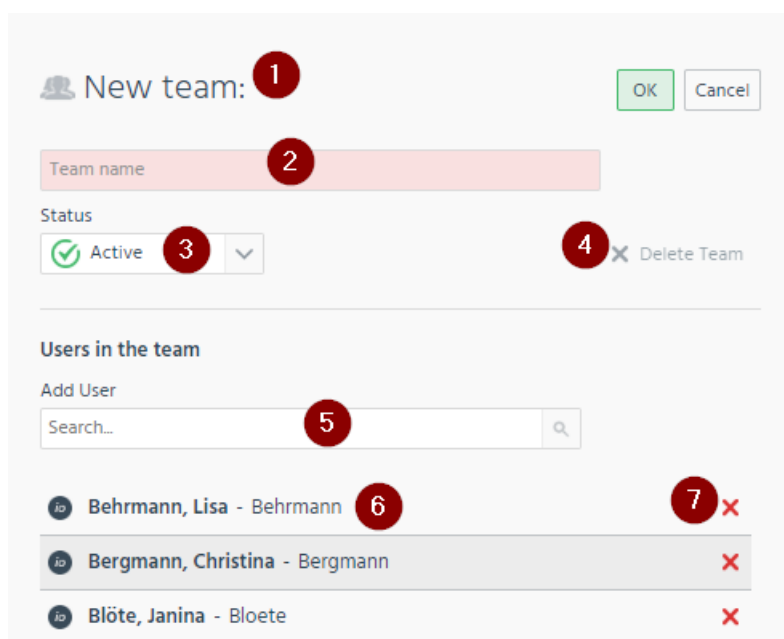


Figure 4.4: Team settings

#	Name	Description
1	Team name	The team name that is entered in text field 2 appears here.
2	Text field for the team name.	Text field where the name of the team is entered.
3	Team status	You can select the status of the team. You can select from <i>Active</i> and <i>Inactive</i> . Please refer to <i>section 30</i> <i>Status</i> and their meanings to find out what the different status types mean.
4	Delete team icon	Press the X symbol to delete the team.
5	User search	Add members to the team. Select the search field and all users of the tenant selected in the toolbar will appear. To refine the search, enter the name of the user you are looking for. All users with that string of letters in their first or last name are shown. Select the searched for user from the list to add him or her to the team.
6	Users	Users that have been added to the team are displayed in this list.

7	Delete icon	Click on the X symbol to remove the user from the team.
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4.5 Changing teams

Previously created teams can be managed and their configuration changed. Changing is just as easy as creating a new user. Simply select the team you wish you modify **1** and click the *Edit* button in the detail view that opens **2**:

Users are changed similarly to how they were initially created. This is described in section *4.4 Creating a new team*.

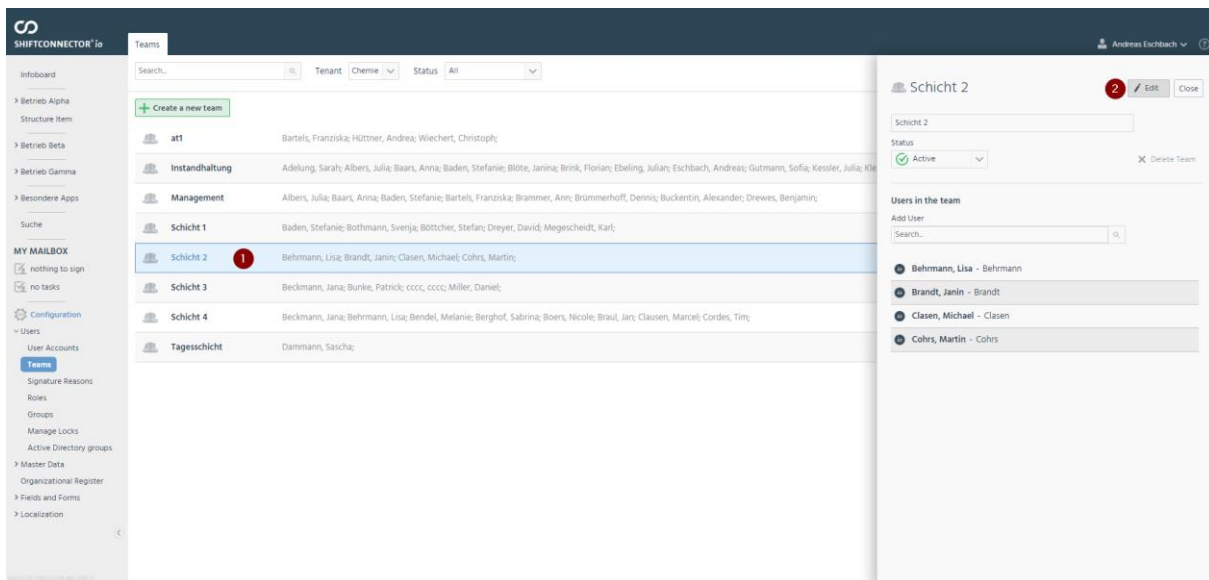


Figure 4.5: Changing teams

5 Managing locks

There are two types of locks in Shiftconnector. Data locks relate to Infoboard/Event/Task/Instruction entries that are in edit mode. Administrative locks relate to Configuration sections that are in edit mode. The data is locked until it is saved or discarded. Under certain circumstances you may wish to manually delete the locks. Use the function described below to do so.

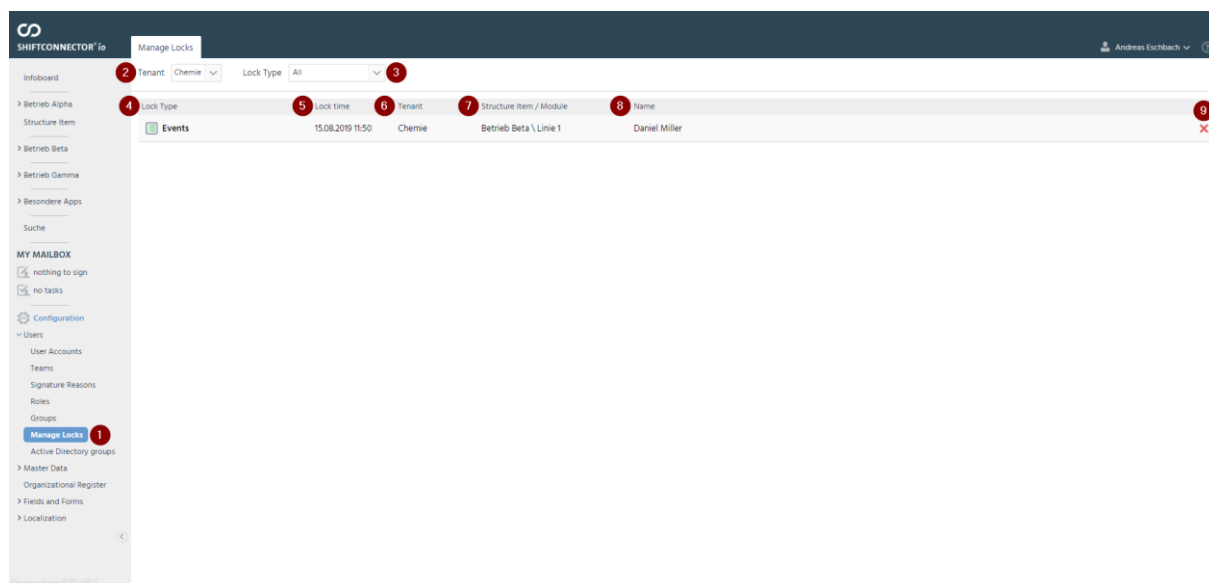


Figure 5.1: Managing locks

#	Name	Description
1	Manage locks	Select <i>Manage locks</i> for an overview of existing locks.
2	Filter tenant	To filter the locks by tenant, you must be assigned to the global administrator group. See section 2.4.2. <i>Tenant & group assignment</i>
3	Filter lock types	You can filter the locks by type and thus make the search easier. See section 5.1. <i>Filter – tenant and lock type</i>
4	Lock types	Under <i>Lock types</i> you can see what type of lock it is based on the icon or description.
5	Lock time	The <i>Lock time</i> column shows the date and time when the lock was set.
6	Tenant	Here you can see for which tenant the lock was created.
7	Structure item / module	In this column you can see which structure item or module has caused the lock.

8	Name of originator	In this column you can see the name of the user who has caused the lock.
9	Delete icon	Click on the x symbol to unlock the lock. A confirmation prompt will appear to verify whether the lock should really be deleted.

5.1 Filter – tenant and lock type

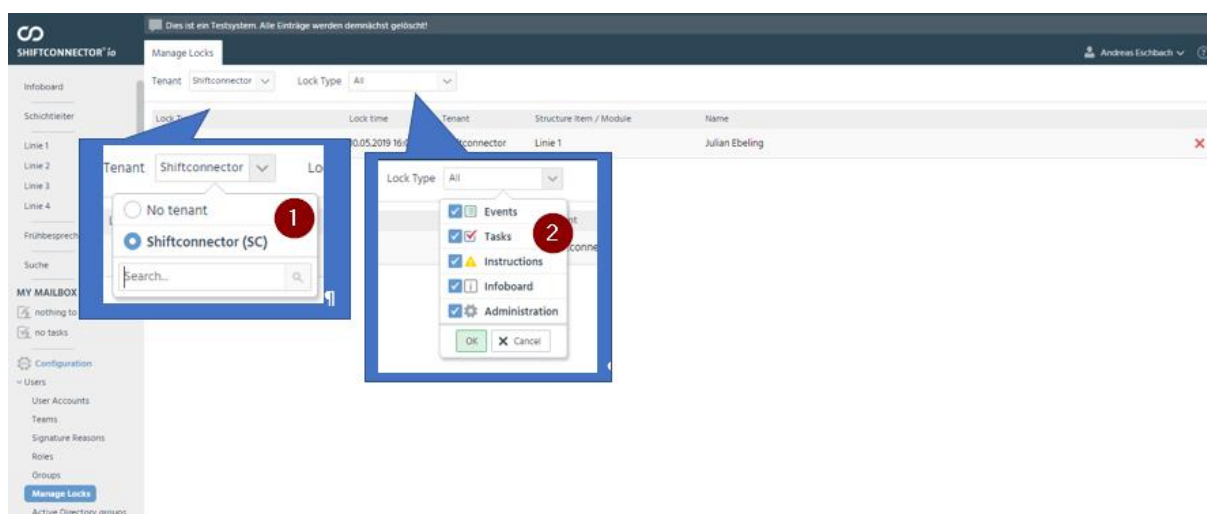


Figure 5.2: Filter – tenant filter and lock types

#	Name	Description
1	Filter tenant	<p>If you have been assigned the global administrator role you can filter the locks by tenant. Select a tenant from the combo box.</p> <p>In addition to the tenants, you also have the <i>No tenant</i> option. This shows locks that globally lock administration areas. So if a user is edited, for example, this area is locked for all tenants.</p> <p>All local administrators can only select the tenants in the combo box for which they have been assigned rights.</p>
2	Filter lock types	<p>You can filter the lists of locks by locks types: Events, Tasks, Instructions, Infoboard and Administration. You may select one or more types.</p>

6 Managing signature reasons

6.1 General

Shiftconnector® allows you to perform reviews and approvals by authorised users. This requires a so-called Signature Reason, to which the authorised users must be assigned. You can create and assign a signature reason in a single step.

The screen is divided into three sections:

1. Toolbar
2. Signature reason list
3. Signature reason details

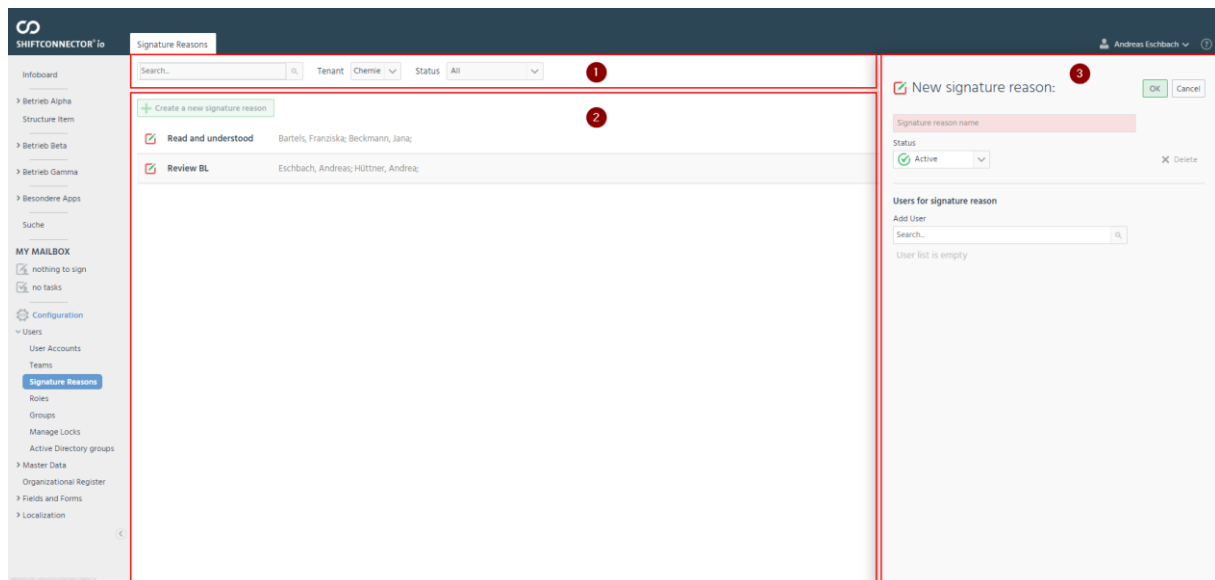


Figure 6:1: Managing signature reasons overview

6.2 Toolbar

The toolbar enables you to filter the signature reason list by tenant and status.



Figure 6:2: Managing signature reasons toolbar

#	Name	Description
1	Search field	You can search by a specific signature reason or a user who is allowed to use the signature reason. Please refer to section 29 Ad-hoc search for information on how the search field works.

2	Tenants	Here you can limit the search to one of your selected tenants. The tenant specified when logging in is selected by default.
3	Signature reason status	You can filter the signature reason list by the status of the signature reasons. Select one or more statuses from the combo box that you want to display. Signature reasons with a green icon have the status <i>Active</i> . Signature reasons with a grey icon have the status <i>Inactive</i> . Both status types are selected by default.

6.3 Signature reason list

The signature reason list gives you an overview of the existing signature reasons and their authorised users. Click on a line in the list to edit the signature reason.



Figure 6:3: Signature reason list

#	Name	Description
1	Create signature reason	Press this button to create a new signature reason. The signature reason details open after clicking. This is where you can specify the signature reason, select the status and define the authorised users.
2	Signature reason	Name of the signature reason.
3	Authorised users	Users who are authorised to sign with the signature reason.
4	Current status	Current status of signature reason.

6.4 New signature reason

To create a signature reason, you must first click on the *New signature reason* button to open the details pane on the page.

Figure 6:4: Signature reason default settings

#	Name	Description
1	Description Signature reason	Enter the name of the signature reason in this field.
2	Status Signature reason	You can select the status of the signature reason. You can select from <i>Active</i> and <i>Inactive</i> . Please refer to section 30 Status and their meanings to find out what the different status types mean.
3	Delete Signature reason	Press the <i>Delete</i> X symbol to delete the signature reason.
4	User search	Add users to authorise them to use this signature reason. Select the search field and all users of the tenant selected in the toolbar will appear. To refine the search, enter the name of the user you are looking for. All users with that string of letters in their first or last name are shown. Select the searched for user from the list to add him or her.
5	Authorised users	Users who are authorised to use the signature reason.

6	Delete user	Click on the X symbol to remove the user from the list.
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6.5 Changing signature reason

Previously created signature reasons can be managed and their configuration changed. Changing is just as easy as creating a new user. Simply select the signature reason you wish you modify **1** and click the *Edit* button in the detailed view that opens **2**:

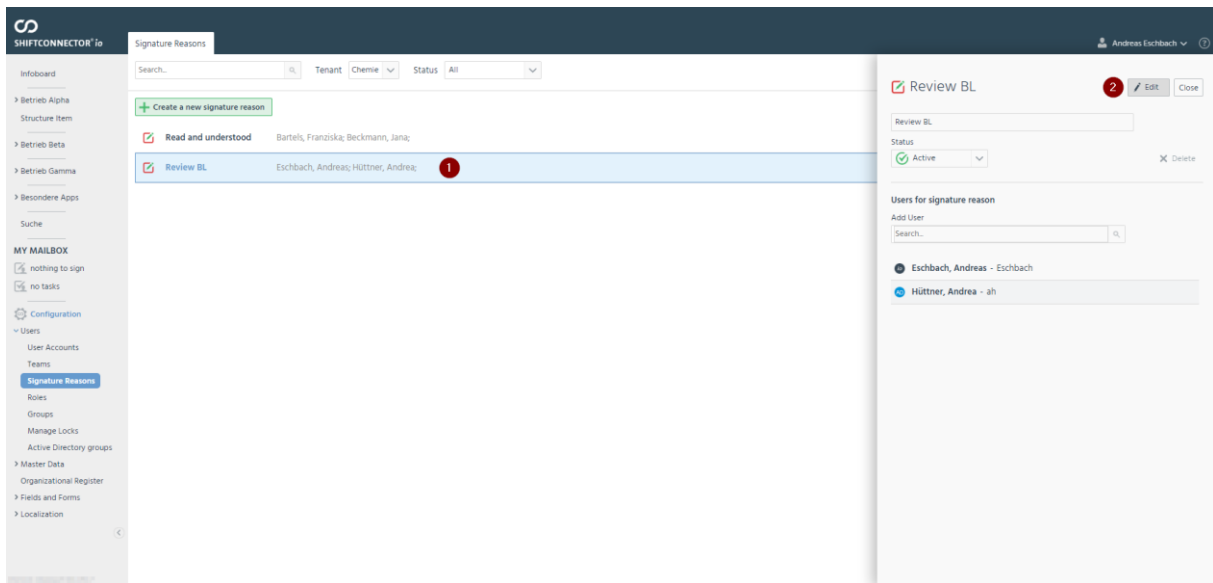


Figure 6.5: Changing signature reason

Users are changed similarly to how they were initially created. This is described in section 6.4

New signature reason.

7 Assigning teams

7.1 General

In the *Teams* menu item you can assign and remove teams to structure items in the Organizational Register (OR). You can also copy the team assignment of a structure item to other structure items.

The screen is divided into the following two sections:

1. Organizational register
2. Team assignment section

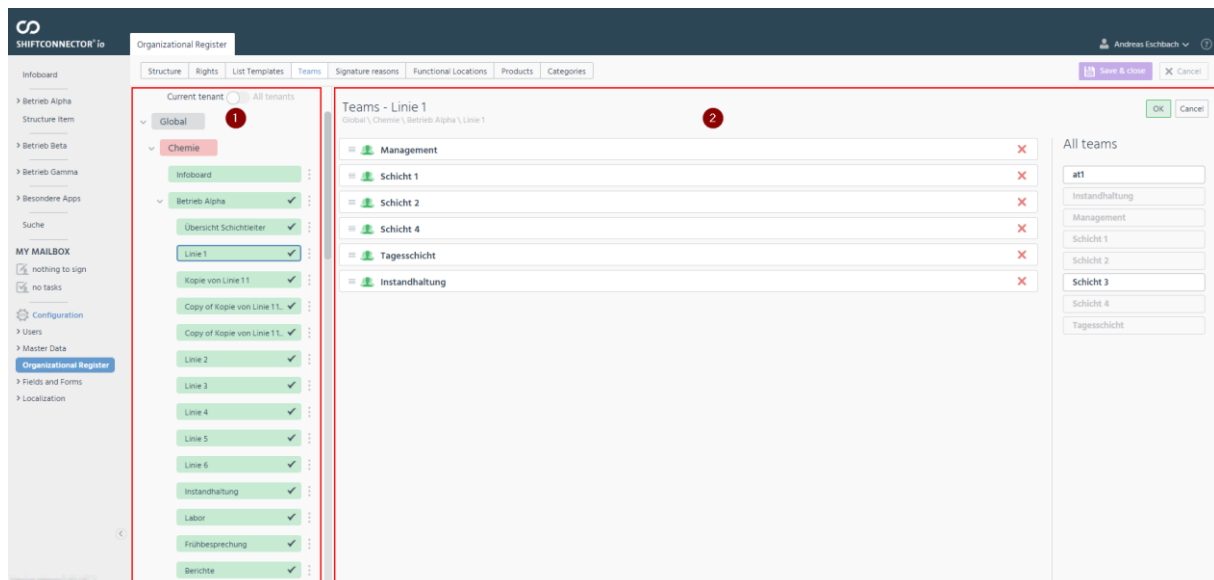


Figure 7:1: Team assignment overview

7.2 Organizational register

To assign teams, you must click on a structure item in the organizational register (OR). This will be marked with a blue border and the input area for the team assignment is displayed.

You can also copy the team assignment of a structure item.

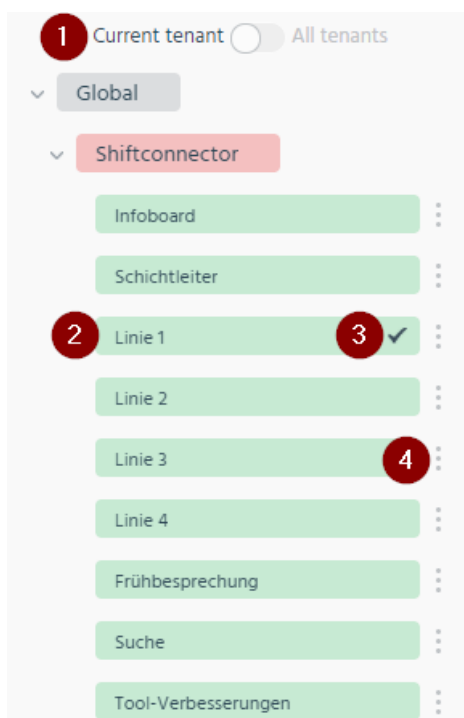


Figure 7:2: Team assignment organizational register

#	Name	Description
1	Current tenant / all tenants	The button is set to “Current tenant” by default. Set the button to “All tenants” to show all available tenants.
2	Selected structure item	The selected item is marked with a blue border. Assigned teams are displayed in the <i>Team assignment</i> section.
3	Assigned items	After you have assigned one or more teams to a structure item, a small checkmark symbol is shown on to the right of the structure item.
4	Context menu	When the icon is selected, a small context menu opens from which copy and paste can be selected. This allows you to copy the assignment of teams from one structure item to another.

7.3 Team assignment

You can assign or remove teams to or from the selected structure item.

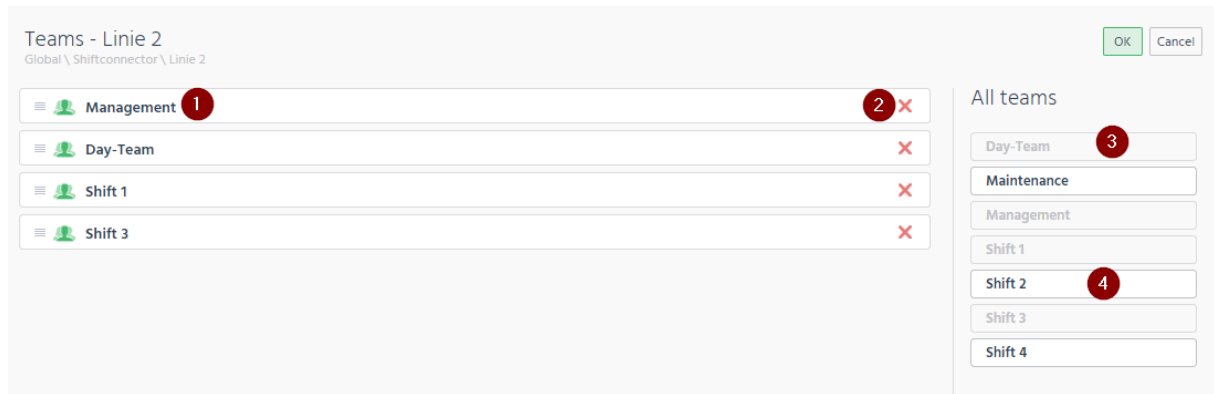


Figure 7:3: Assigning teams to structure items

#	Name	Description
1	Selected teams	All selected teams appear as a list in the center of the screen.
2	Delete symbol	Previously selected teams can be removed by pressing the symbol.
3	Selected team	Each team can be assigned to a structure item once. Already assigned teams are greyed out.
4	Unselected team	Unselected teams are not assigned and are available for assignment.

8 Assigning signature reasons

8.1 General

In the *Assign signature reasons* menu item you can assign and remove signature reasons to structure items in the organizational register (OR). You can also copy the signature reason assignment of a structure item to other structure items.

In edit mode, the screen is divided into two sections:

1. Organizational register
2. Signature reason assignment section

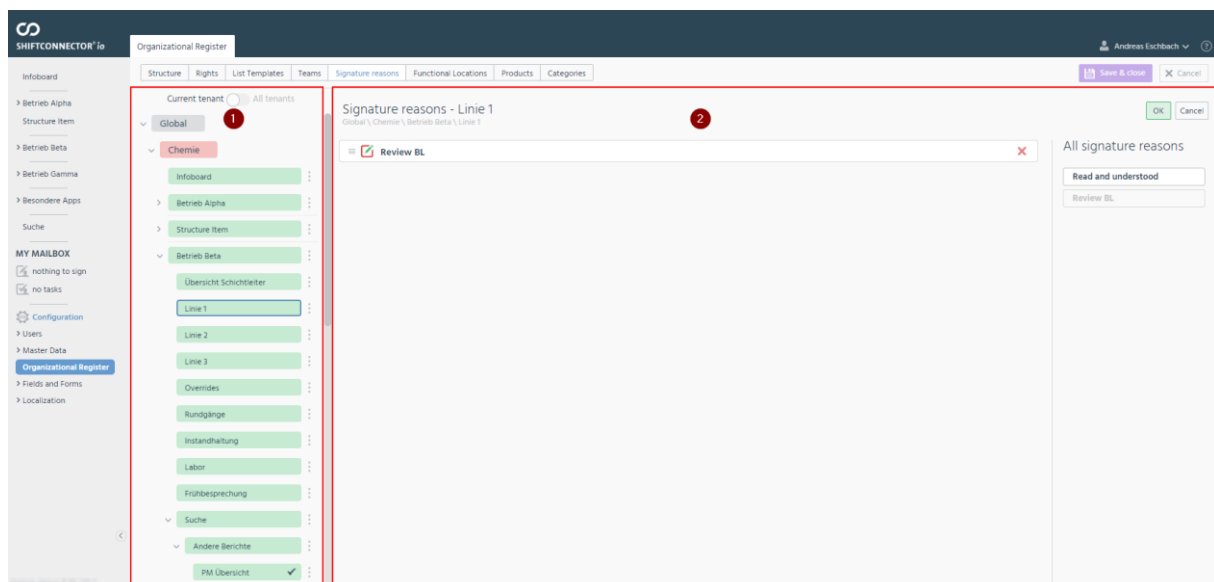


Figure 8.1: Overview of signature reason assignment

8.2 Organizational register

To assign a signature reason, you must click on a structure item in the organizational register (OR). This will be marked with a blue border and the input area for the signature reason assignment is displayed.

You can also copy the signature reason assignment of a structure item.

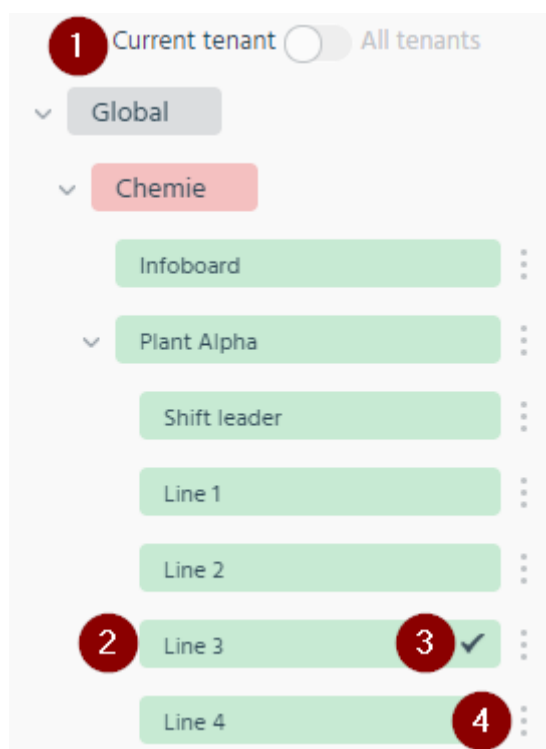


Figure 8.2: Signature reason assignment organizational register

#	Name	Description
1	Current tenant / all tenants	The button is set to “Current tenant” by default. Set the button to “All tenants” to show all available tenants.
2	Selected structure item	The selected item is marked with a blue border. Assigned signature reasons are displayed in the <i>Signature reason assignment</i> section.
3	Assigned items	After you have assigned one or more signature reason to a structure item, a small checkmark symbol is shown on the right of the structure item.
4	Context menu	When the icon is selected, a small context menu opens from which copy and paste can be selected. This allows you to copy the assignment of signature reasons from one structure item to another.

8.3 Signature reason assignment

You can assign or remove signature reasons to or from the selected structure item.

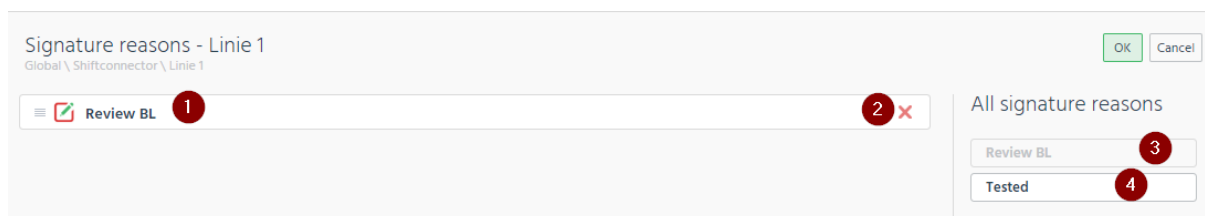


Figure 8.3: Assigning signature reasons to structure items

#	Name	Description
1	Selected signature reasons	All selected signature reasons appear as a list in the centre of the screen.
2	Delete symbol	Previously selected signature reasons can be removed by pressing the symbol.
3	Selected signature reason	Each signature reason can be assigned to a structure item once. Already assigned signature reasons are greyed out.
4	Unselected signature reason	Unselected signature reasons are not assigned and are available for assignment.

9 Managing list templates

9.1 General

From the *Organizational register* menu item you can open various configuration areas. To edit list templates, select *List templates* from the selection list. You can manage list templates at tenant or tab level. You can inherit list templates created at the tenant level to tabs or copy list templates from one tab to another tab of the same type. Cross-tenant list templates can only be created by global administrators.

The screen is divided into two sections:

1. Organizational register
2. List with list templates

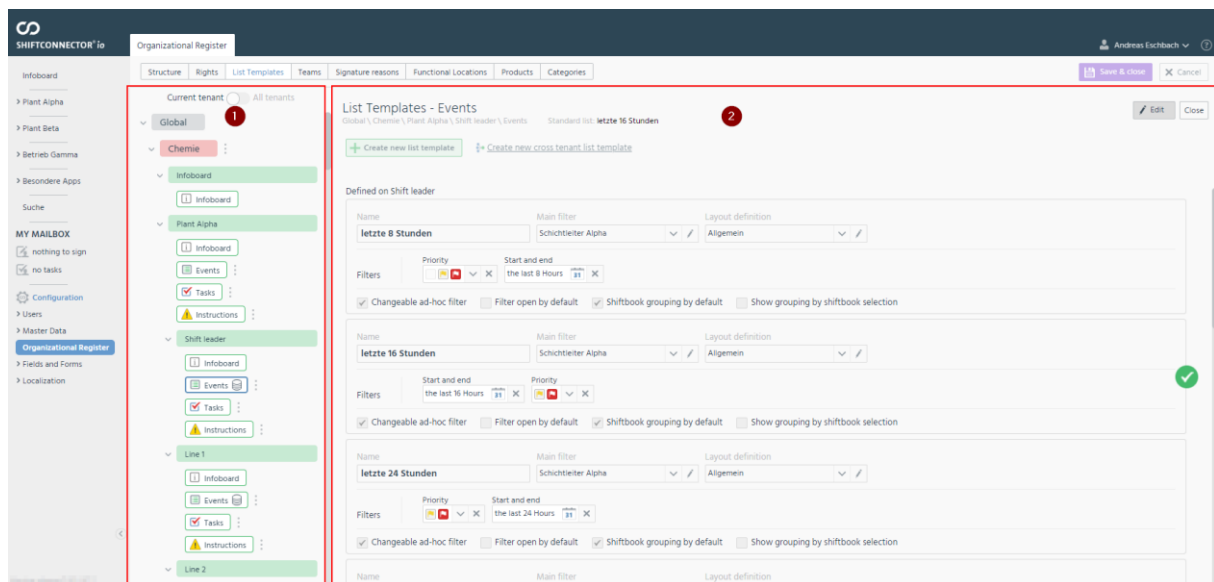


Figure 9.1: Overview of list template management

9.2 Organizational register

In the organizational register you can select for which tenants or tabs you want to manage list templates. List templates that are created on the tenant level can be inherited to the sub tab. List templates that are created on the tab cannot be inherited.

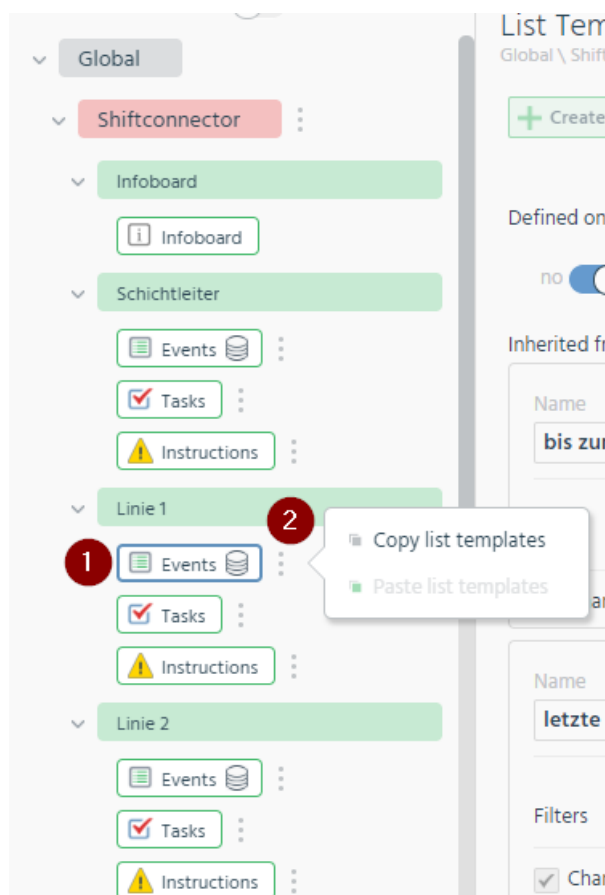


Figure 9.2: Managing list templates organizational register

#	Name	Description
1	Selected structure item	The selected item is marked with a blue border.
2	Context menu	When the icon is selected, a small context menu opens from which copy and paste can be selected. This allows you to copy the list templates from one tab to another tab of the same type.

9.3 List of list templates

The list template list gives you an overview both tenant-specific and cross-tenant list templates. In the list templates tab you can also see which list templates can be inherited.

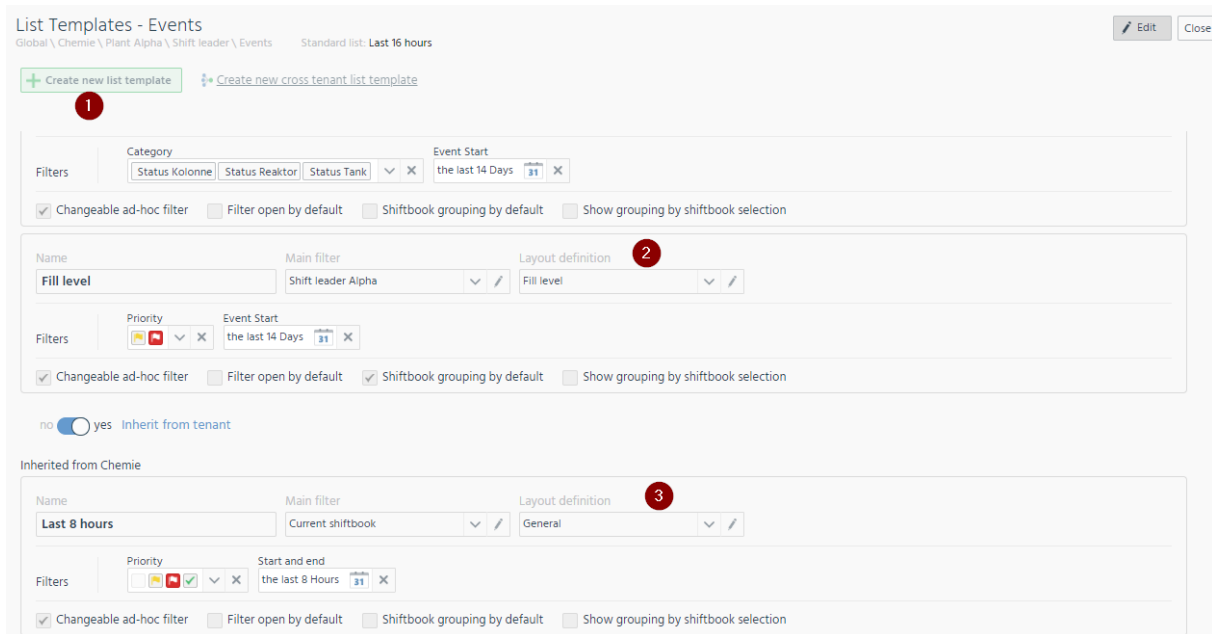


Figure 9.3: List of list templates

#	Name	Description
1	New list template	In the organizational register, select a tab and enable the configuration area by pressing the <i>Edit</i> button. All local list templates can now be edited, and you can create new list templates.
2	List template	Existing list templates can be edited at any time.
3	Tenants list templates	Existing tenants list templates can only be edited at tenant level.

9.4 Creating a new list template

To create a list template, you must first click on the *New list template* button in edit mode. You can then configure the newly created list template the way you want.

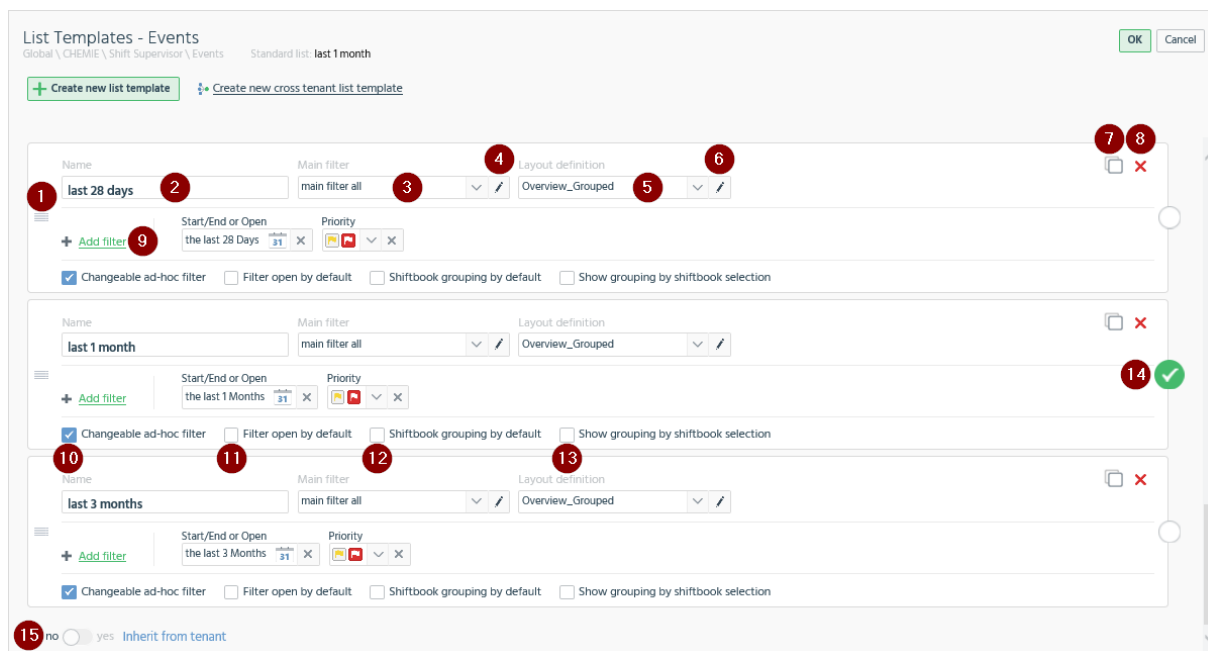



Figure 9.4: Configuring list templates

#	Name	Description
1	Drag & drop icon	The list template forms can be moved in edit mode. Press and hold  to drag the list template to the new position, which will be indicated by a blue line between the other list templates.
2	Name	Enter the name of the list template in this field.
3	Main filter	Select one of the existing main filters with the drop-down menu.
4	Pen icon	When you click on the pen icon, a window opens in which you can create a new <i>Main filter</i> .
5	Layout definition	Select one of the existing column layouts with the drop-down menu.
6	Pen icon	When you click on the icon, a window opens in which you can create and define a new column layout.
7	Duplicate	Confirm the icon to display a copy of the list template under the original list template with the name “Copy of...”.
8	Delete	Press the X symbol to delete the selected list template.

9	Add attribute filter	When you click on the icon, a window opens in which you can select an attribute filter. This will appear on the right next to the icon and can be configured in the form.
10	Changeable Ad-hoc filter	Check this box to allow the user to subsequently change the filter.
11	Filter expanded by default	Check this box to leave the ad-hoc filter open by default.
12	Grouped by Shiftbook	Check this box to group all entries by shiftbooks by default.
13	Checkbox grouped by Shiftbook	Check this box to allow the user to subsequently switch the shiftbook grouping on and off.
14	Standard list template	Check this box to select the list template as default.
15	Inherit tenant-specific list templates.	Enable this switch to apply tenant-specific list templates.

9.5 Main filter

In the main filter window you can create a new main filter or select an existing main filter for your list template. The main filter limits the shiftbooks of a tenant from which the entries are displayed when the list template is selected.

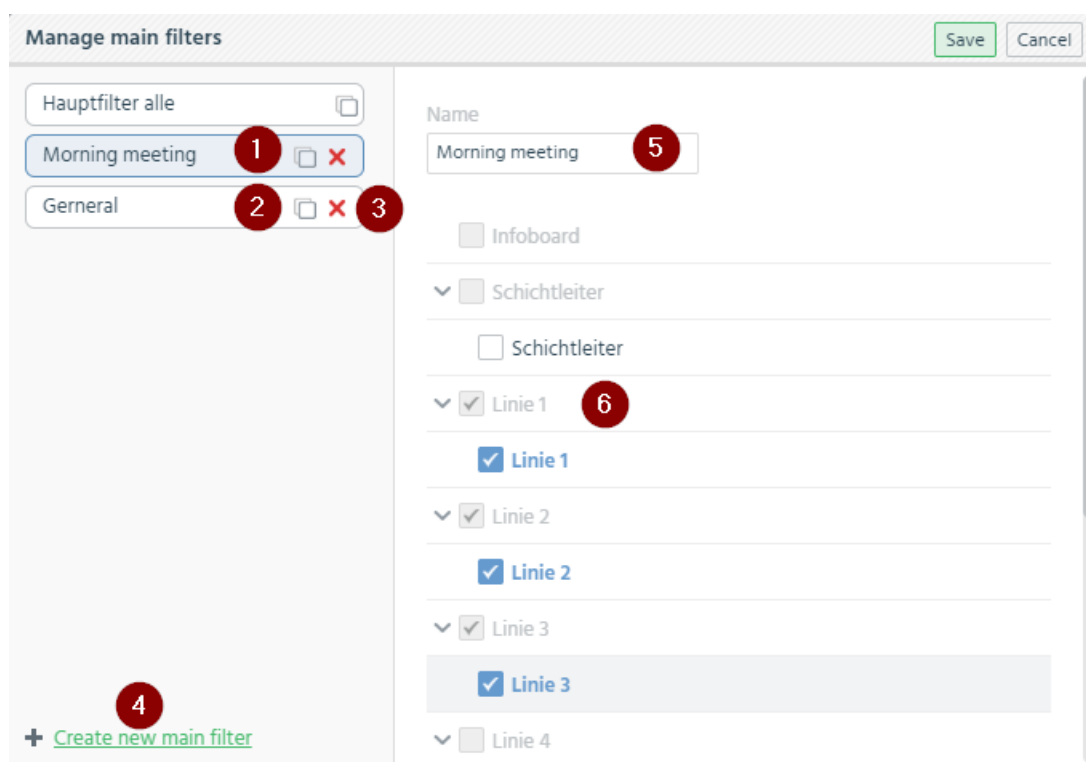


Figure 9.5: Configuring the main filter

#	Name	Description
1	Selected main filter	Select the main filter by clicking the button.
2	Duplicate main filter	Press the duplicate icon and a copy of the main filter will appear at the bottom of the list with the name "Copy of main filter...".
3	Delete main filter	Press the delete icon to delete the main filter. Only main filters that have not been selected as the main filter in any other list template can be selected.
4	Create new main filter	Click on the hyperlink to create a new main filter. The new main filter appears at the end of the list of main filters and is called "Main filter name".
5	Name main filter	Enter the name of the main filter in this field.
6	Select shiftbooks	Select the shiftbooks from which you want to list the entries.

9.6 Defining a Layout definition

As a local administrator you can create and edit column layouts. You must be assigned the *Global administrator* role to configure global column layouts.

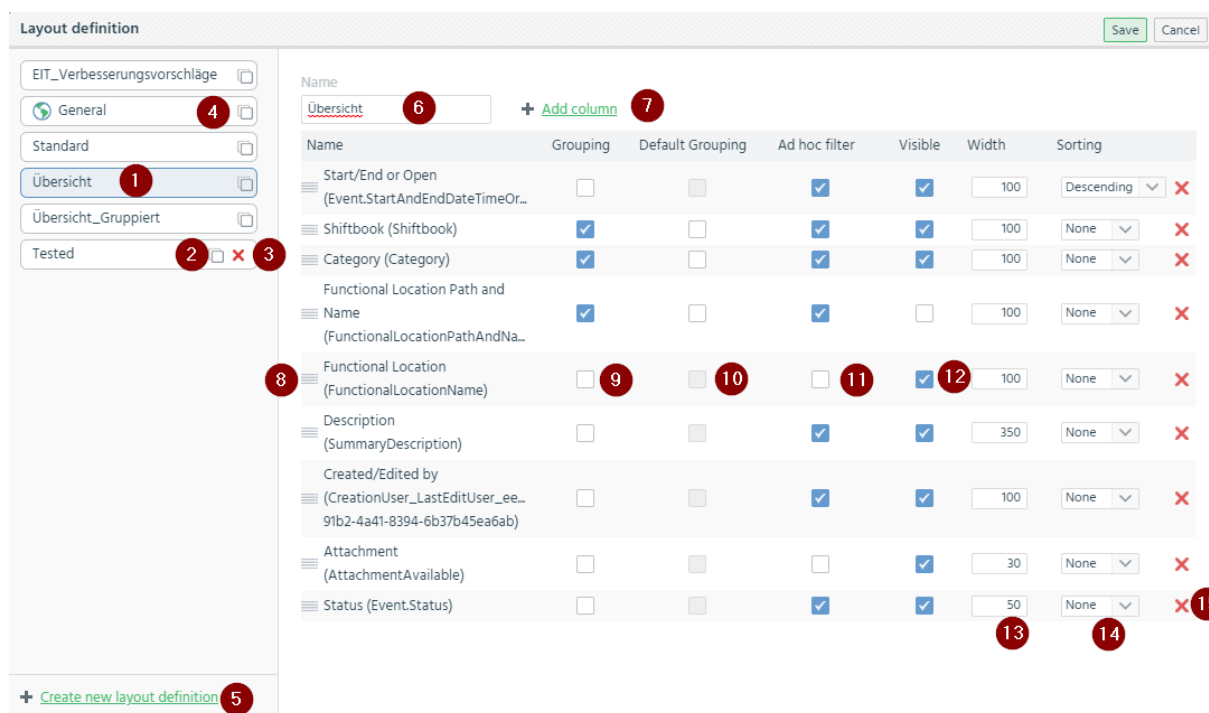



Figure 9.6: Configuring column layout

#	Name	Description
1	Selected column layout	Select the column layout by clicking the button.
2	Duplicate column layout	Press the duplicate icon and a copy of the column layout will appear at the bottom of the list with the name “Copy of column layout...”.
3	Delete column layout	Press the delete icon to delete the column layout. Only column layouts that have not been selected as the column layout in any other list template can be selected.
4	Global column layout	Local administrators can use a global column layout for a list template, but changing the configuration of the global column layout is not permitted. Global administrators can use the global list layout for list templates and change the configuration of the global column.
5	Create new column layout	Click on the hyperlink to create a column layout. The new column layout appears at the end of the list of column layouts and is called “Column layout name”.
6	Name column layout	Press in the text field to enter the name of the column layout.

7	Create new column	Click on the hyperlink to open a window where you can select an attribute for the new column. The new column appears at the bottom of the list of columns.
8	Drag & drop icon	You can move the columns. Press and hold  to drag the column to the new position, which will be indicated by a blue line between the other columns.
9	Grouping	Select the attributes by which you would like to group.
10	Default grouping	You can select one of the attributes selected in no. 9 as the default grouping.
11	Ad-hoc filter	Select which attributes to include in the ad-hoc filter.
12	Visible	Select which column should be visible in the layout.
13	Column width	Enter the desired column width.
14	Sorting	Select the desired sorting for the columns. You can choose between <i>Ascending</i> and <i>Descending</i> or <i>None</i> .
15	Remove	Press the X symbol to remove the selected column.

10 Cross-tenant list templates

10.1 General

Cross-tenant list templates display entries from shiftbooks of multiple tenants. Only global administrators are authorised to create and configure cross-tenant list templates.

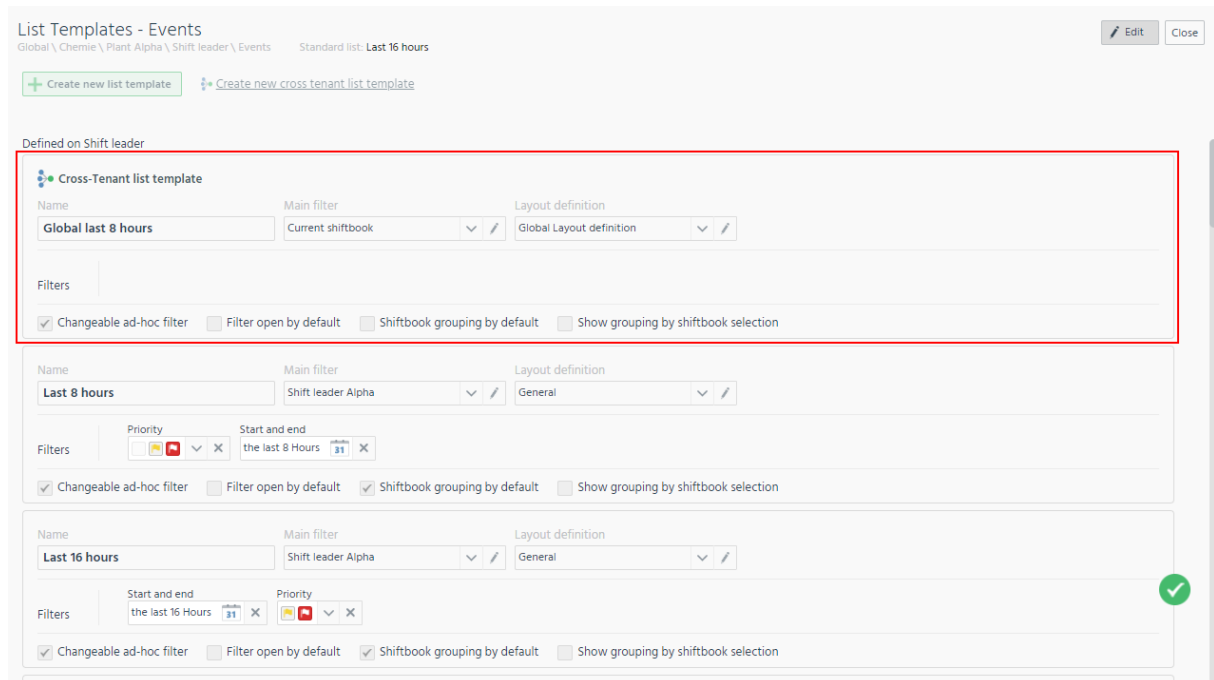


Figure 10.1: Cross-tenant list templates

10.2 Cross-tenant main filter

If you have been assigned the *Global administrator* role, you can select shiftbooks of other tenants via the cross-tenant main filter in order to display those entries in the list.

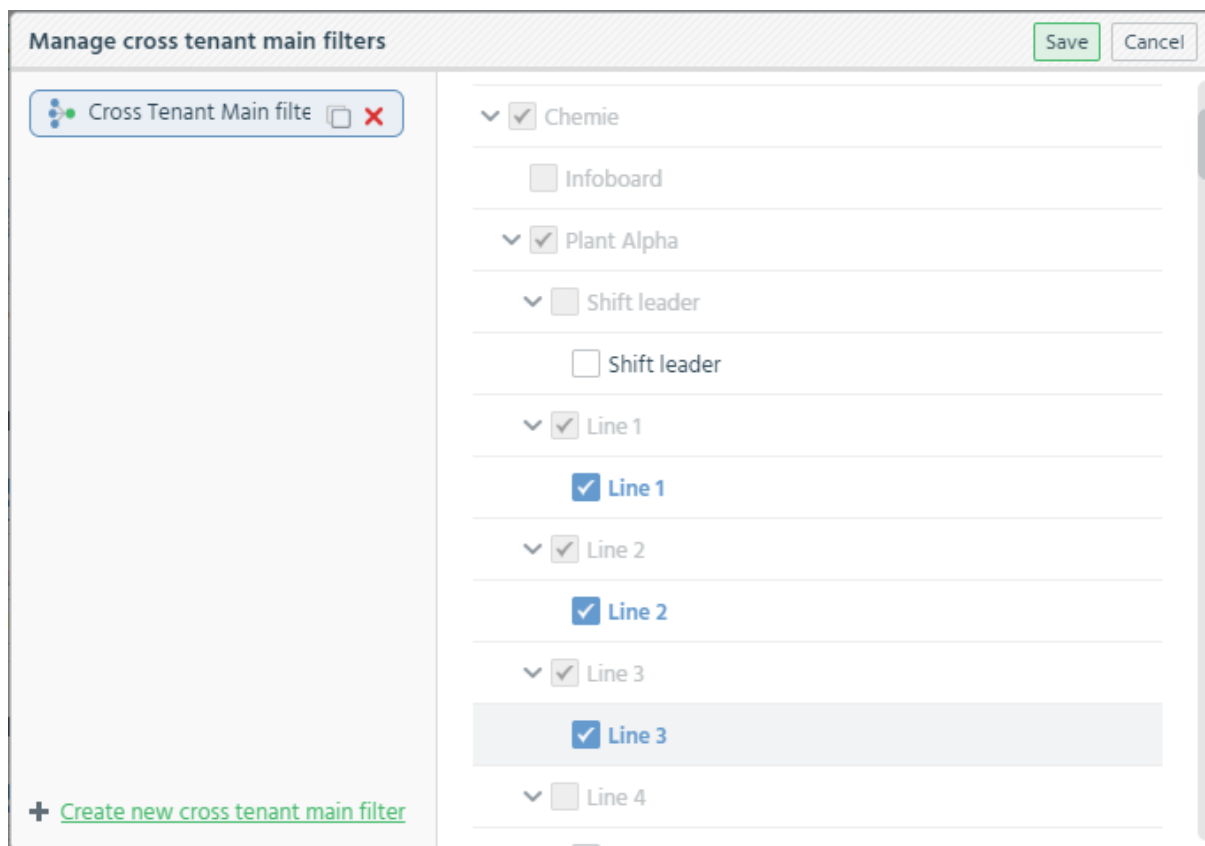



Figure 10.2: Configuring the cross-tenant main filter

#	Name	Description
1	Selected cross-tenant main filter	Cross-tenant main filters are marked with the  symbol. These can only be selected or created for cross-tenant list templates.
2	Select shiftbooks	Select the shiftbooks of which the entries should be displayed. By entering shiftbooks or structure items of other tenants, their entries are also listed.
3	Create new main filter	Click on the hyperlink to create a new cross-tenant main filter. The new main filter appears at the end of the list of main filters and is called "Main filter name". Cross-tenant main filters can only be created for cross-tenant list templates.

10.3 Global column layout definition

Only the global administrator is allowed to create and edit global column layouts.

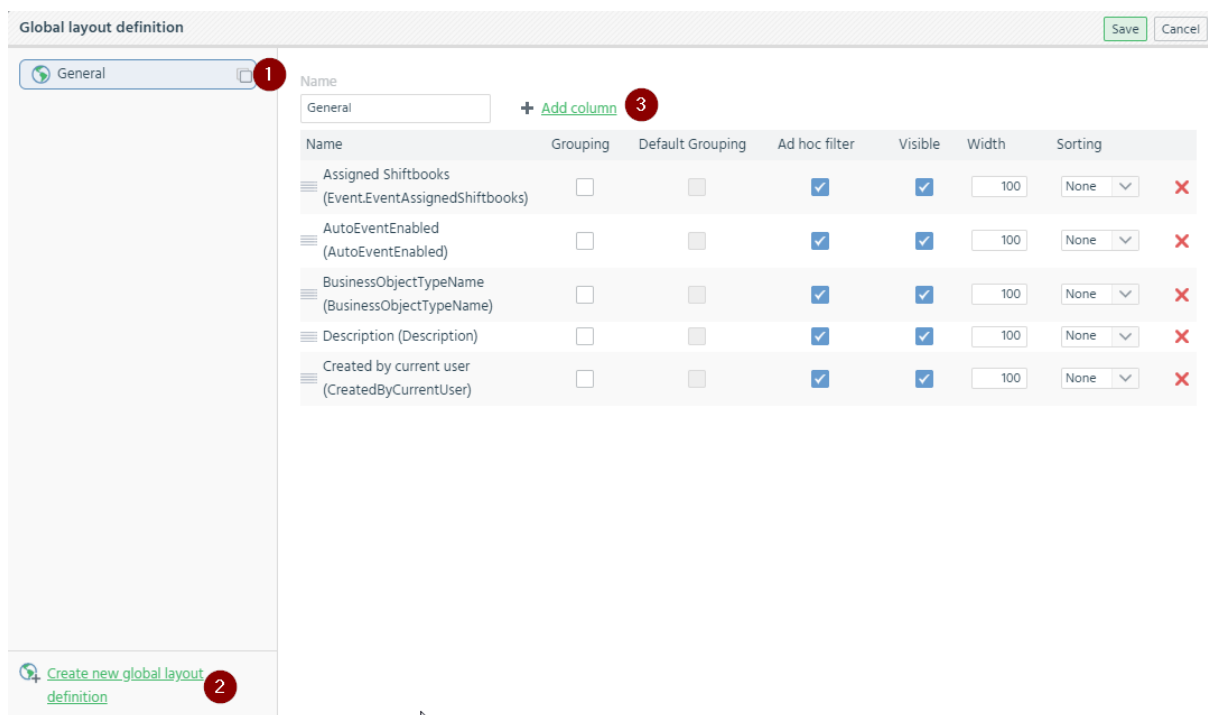



Figure 10.3: Configuring a global column layout

#	Name	Description
1	Selected column layout	Global column layouts are marked with the  icon. They can also be selected for list templates.
2	Create new global column layout	Click on the hyperlink to create a new global column layout. It will appear at the end of the list with the name "Column layout name".
3	Create new column	Click on the hyperlink to create a new column. A window opens and you can select a global attribute for the column. The new column appears at the bottom of the list.

11 Managing the organizational structure

Click on *Structure* in the selection list of the organizational register menu to open the structure menu. There you can configure and manage the organizational register according to your preferences.

The screen is divided into two sections:

1. Organizational register
2. Configuration items

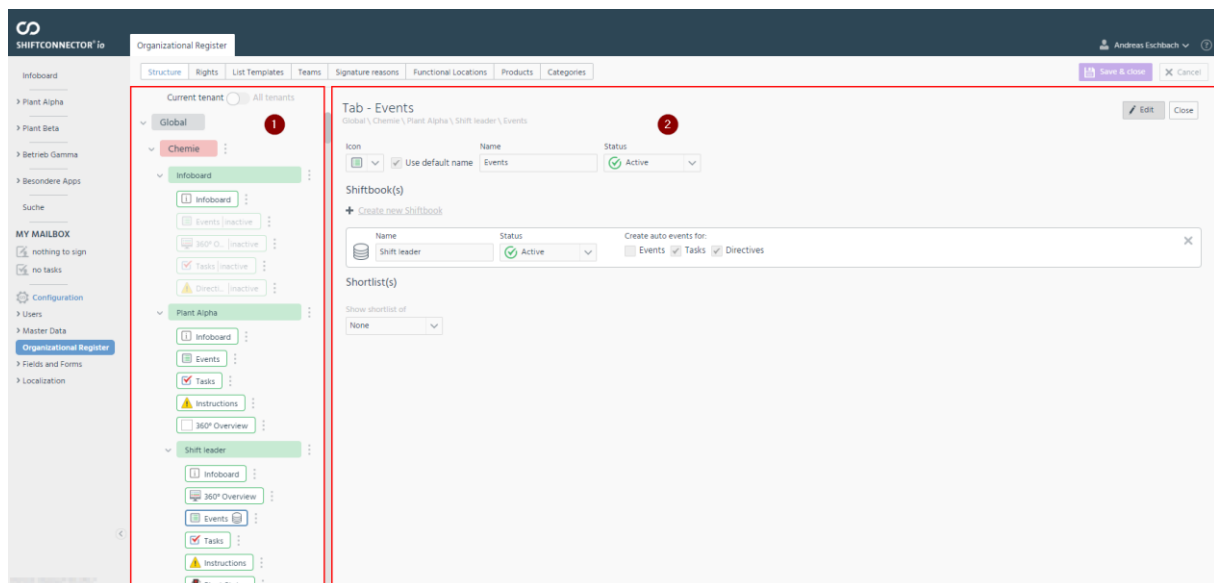


Figure 11.1: Overview of organizational structure management

11.1 Managing the organizational structure

In the organizational register you can create one or more types of items on each level. Click on the symbol to open the context menu. You will have various options from there.

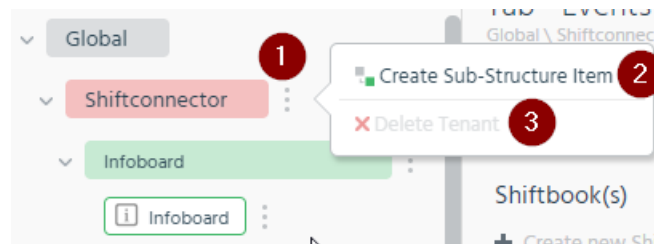


Figure 11.2: Tenant options

#	Name	Description
1	Context menu icon	Selecting the symbol next to the tenant will open a small context menu. This allows you to create a sub-structure item.
2	Create sub-structure item	Click on the button in the context menu and the sub-structure item will appear below the tenant.
3	Delete tenant	Click on this button to delete the tenant.

11.1.1 Context menu on structure item level

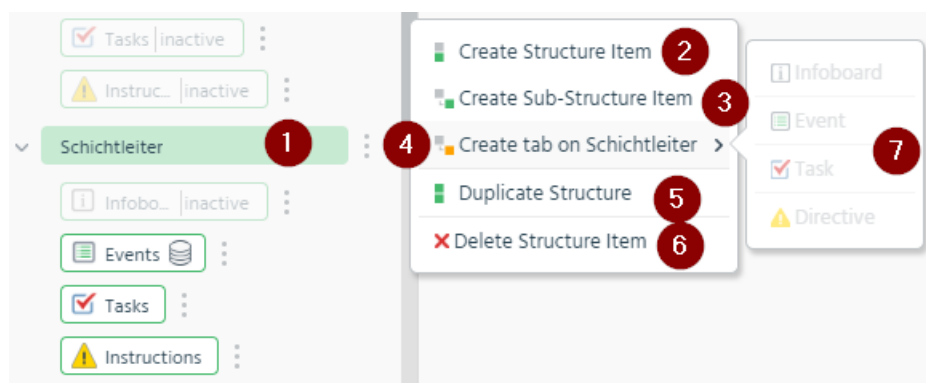


Figure 11.3: Structure item options

#	Name	Description
1	Context menu icon	Selecting the symbol next to the structure item will open a small context menu. This allows you to create a sub-structure item or a tab of your choosing. You can also duplicate the entire structure of the structure item or delete the structure item.

2	Create structure item	Click on the button in the context menu and a new structure item appears below the existing structure item.
3	Create sub-structure item	Click on the button in the context menu and a sub-structure item will appear.
4	Create tab	Click on the button in the context menu and a new tab will be created for the structure item.
5	Duplicate structure	Click on the button in the context menu to duplicate the structure item and sub-structure.
6	Delete structure item	Click on this button to delete the structure item.
7	Tab types	The following types of tabs are available: infoboard, events, tasks and instructions.

11.1.2 Structure items on tab level

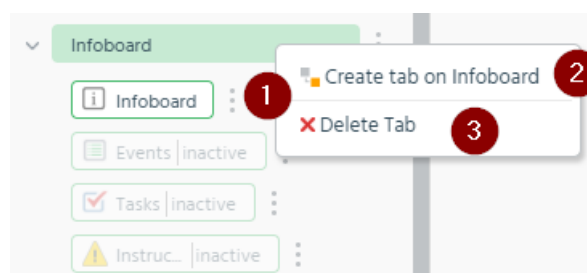


Figure 11.4: Tab options

#	Name	Description
1	Context menu icon	Selecting the symbol on the infoboard will open a small context menu. This allows you to create additional tabs.
2	Create new tab	Click on the button in the context menu and add another tab.
3	Delete tab	Click on the button to delete the tab.

11.2 Configure a Tenant

In the client element you can configure in three tabs, the Welcome text and Liveticker, the Basic settings, the Security settings.

11.2.1 Welcome text & Liveticker

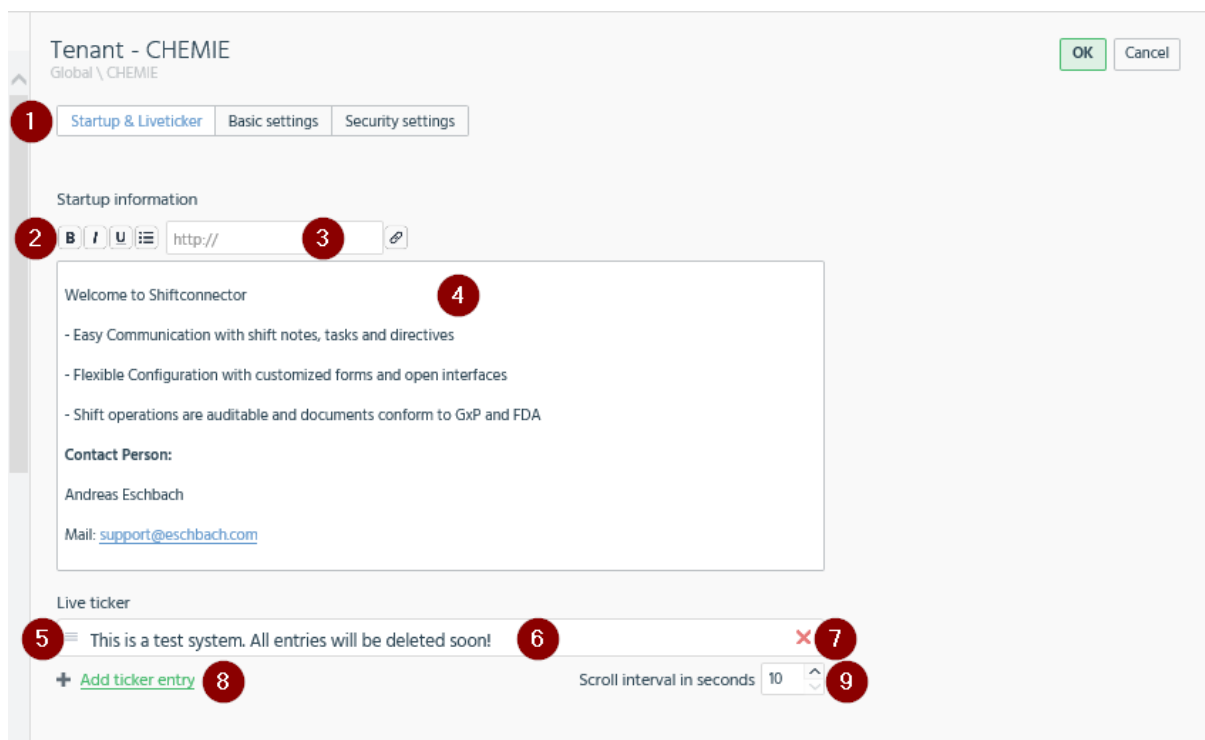




Figure 11.5: Startup & Liveticker

#	Name	Description
1	Startup & Liveticker	Select the Welcome text and Liveticker tab to configure them.
2	Text Editor icons	Following formatting tools to edit the written text are available. <ul style="list-style-type: none"> - B stands for bold - <i>I</i> stands for italic - <u>U</u> stands for underlined
3	Link	Link a name to an e-mail address or Internet address. Enter the address in the field. Mark the name and click on the linking symbol  .
4	Text field	Enter the Welcome text in the field. A maximum of 2000 characters can be entered in the text field.
5	Drag & Drop icon	Take the Liveticker entries at the icon and move them in the desired order.

6	Liveticker	Enter the Liveticker text in the field. A maximum of 120 characters can be entered in the text field.
7	Delete icon	Click the icon  to delete the entry.
8	Add ticker entry	Click the button to create a new Liveticker entry. This will appear below the existing entry.
9	Scroll interval in seconds	Set the change intervals of the live ticker entries in seconds.

11.2.2 Basic settings

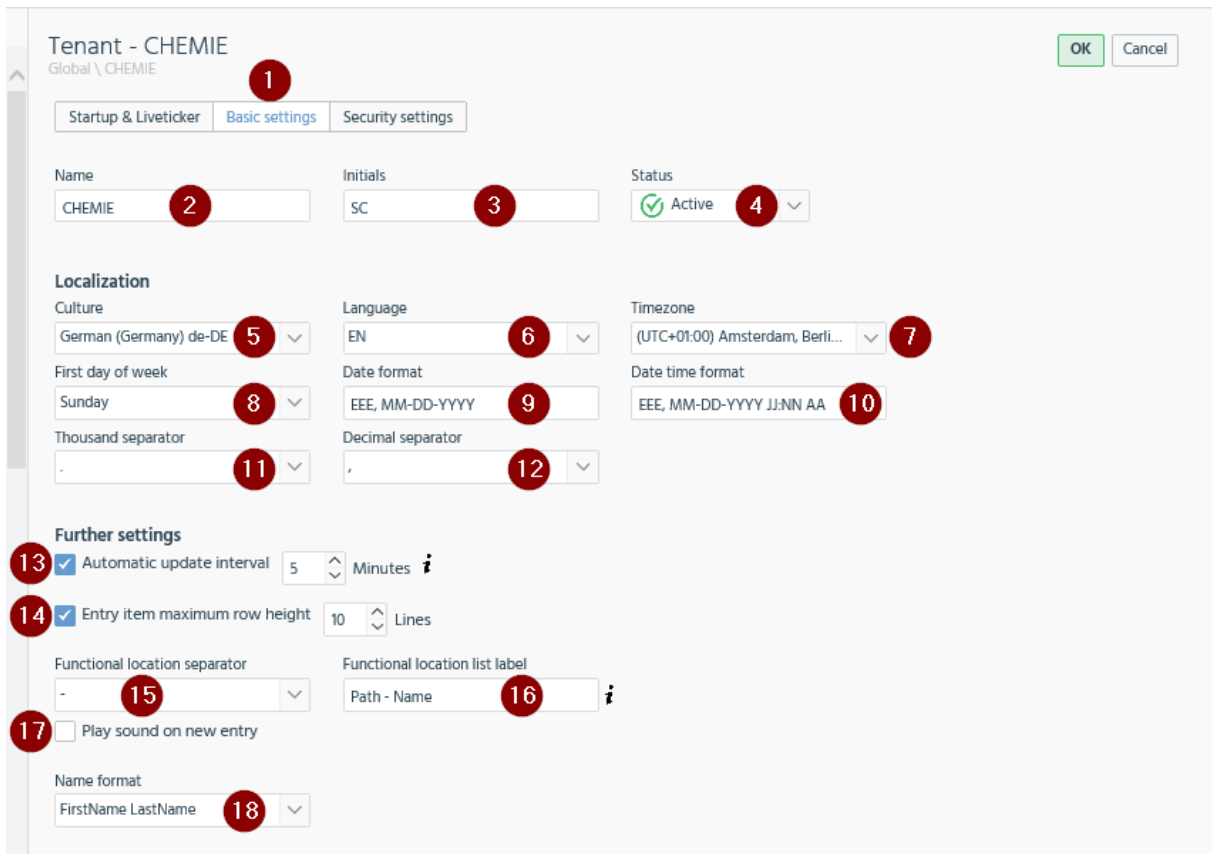


Figure 11.6: Basic settings

#	Name	Description
1	Basic settings	Select the Basic settings tab to make the main settings for the client.
2	Name	Enter the name of the client here.
3	Initials	Enter the initials of the clients here.

4	Status	Choose the status of the client. Active and Inactive are available. What the status types mean is explained in chapter 29 Status and their meanings.
5	Culture	Select the culture of the client here.
6	Language	Here you can select the language.
7	Timezone	Select the time zone in which the client is located.
8	First day of the week	Select the first day of the week here.
9	Date format	Change the date format by changing the default combination.
10	Date/time format	Change the date/time format by changing the default combination.
11	Thousands separator	Define the thousands separator for numbers here.
12	Decimal separator	Select the decimal separator for numbers.
13	Automatic update interval	Set the intervals at which the lists are to be updated automatically.
14	Maximum column height for entries	Set the maximum column height of an entry here.
15	Functional Locations separator	Select the separator for functional locations from this dropdown list.
16	Functional locations List description	Enter the list description for functional locations in this field.
17	Play a sound, ...	Select whether to play a sound when creating an entry.
18	Name format	Select the name format here.

11.2.3 Security settings

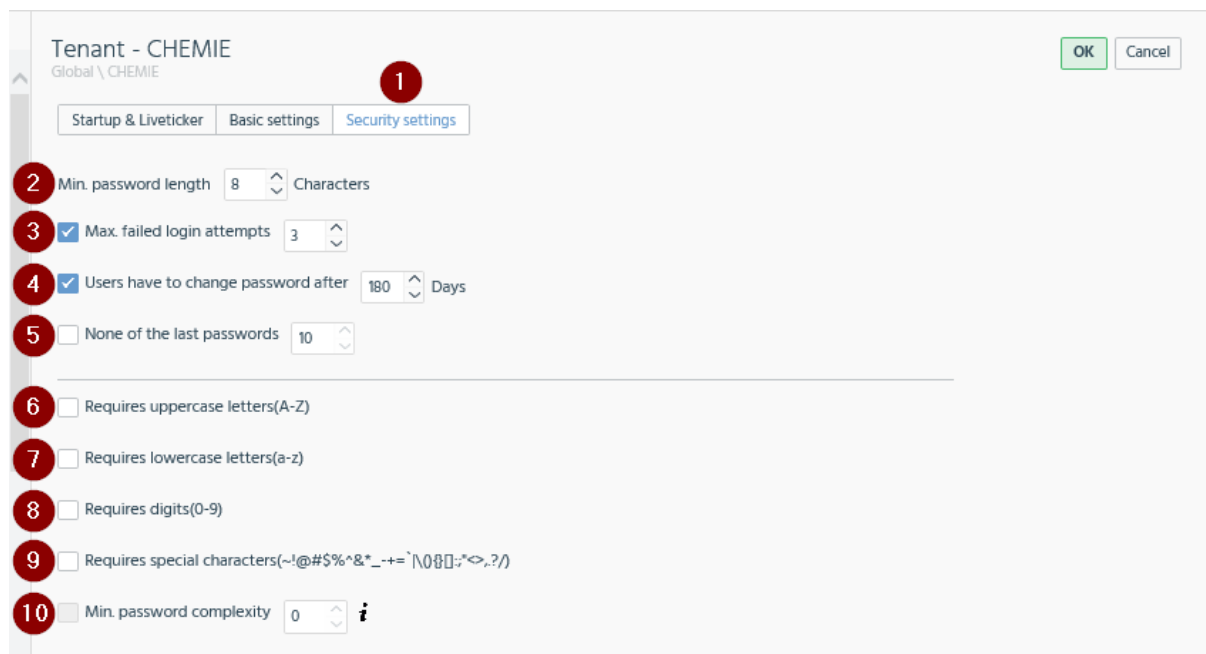


Figure 11.7: Security settings

#	Name	Description
1	Security settings	Select the Security settings tab to configure them.
2	Min. password length	Enter the minimum password length here.
3	Maximum number of failed login attempts	Set how often a user is allowed to enter the password incorrectly without being locked.
4	User must change password after ... days	Enter the intervals at which users must change their passwords here.
5	None of the old passwords	Define how many of the previous old passwords must not be reused by the users.
6	Requires capital letters	Select whether the user password must contain uppercase letters.
7	Requires lower case letters	Specify whether the user password must contain lowercase letters.
8	Requires numbers	Check this box if the user password must contain a number.
9	Requires special characters	Select whether the user password must contain special characters.
10	Minimal password complexity	Set how many of the requirements selected above the user password must meet.

11.3 Configuring a structure item

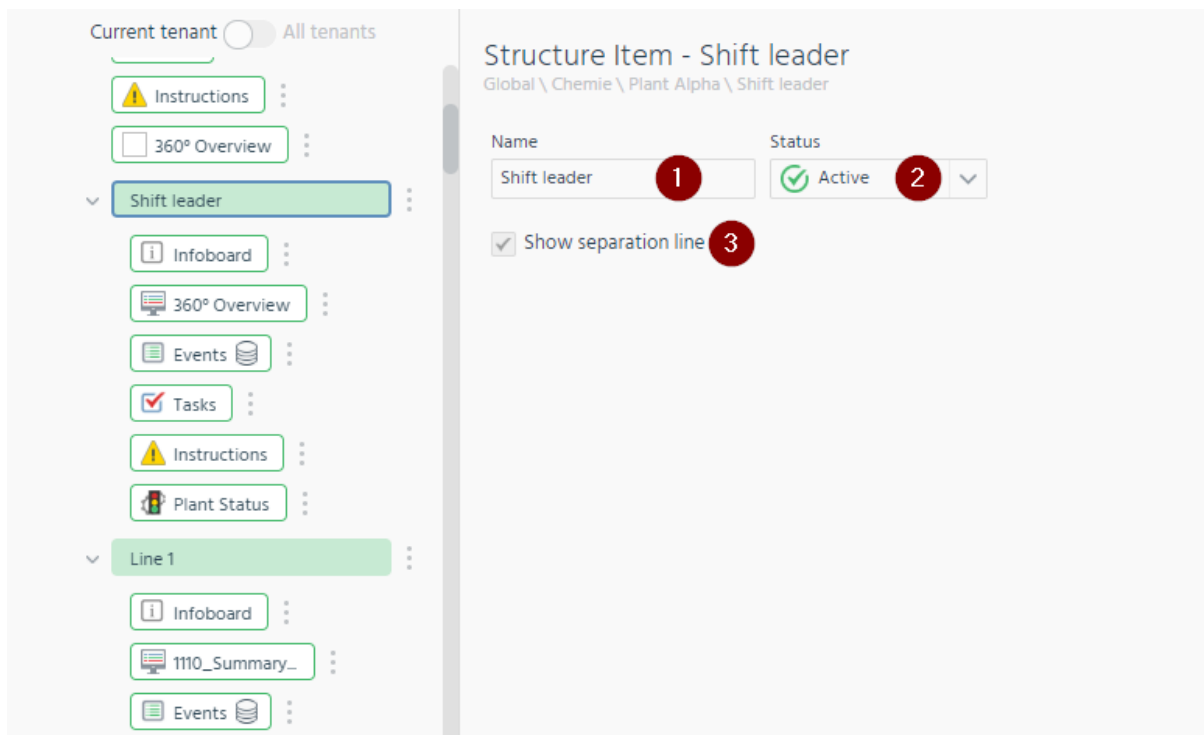


Figure 11.8: Configuring a structure item

#	Name	Description
1	Name of the structure item	Enter the name in the structure item.
2	Select the structure item	Select the status for the structure item. You can select between <i>Active</i> and <i>Inactive</i> .
3	Shows the separator above the structure item	Check the box to display a separator above the structure item in the menu.

11.4 Event tab configuration

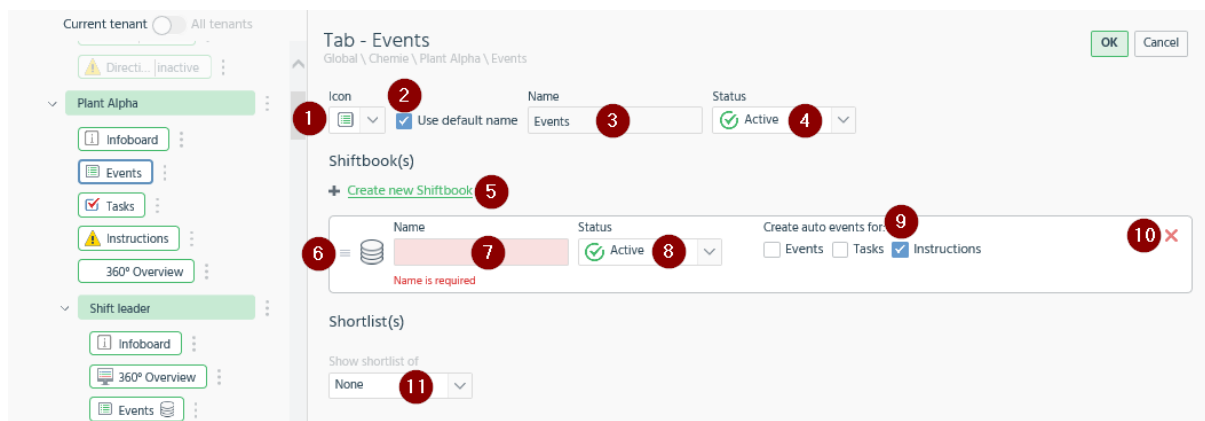


Figure 11.9: Configuring the event tab

#	Name	Description
1	Tab icon	Select one of the tab icons.
2	Use default name	Uncheck to rename the event tab.
3	Tab name	Change the name of the selected tab here.
4	Tab status	Select the status for the tab You can select between <i>Active</i> and <i>Inactive</i> .
5	Create shiftbook	Create a shiftbook by clicking on <i>Create new Shiftbook</i> .
6	Drag & drop icon	You can arrange the shiftbooks according to your preferences. Click on this icon and drag the line to the new position. The new item is shown with a blue line.
7	Name of the shiftbook	Enter the name of the shiftbook in the field.
8	Shiftbook status	Select the status for the shiftbook. You can select between <i>Active</i> , <i>Inactive</i> and <i>Read-only</i> .
9	Create auto events for	Select for which entries you wish to create an auto event. You can create auto events for events, tasks or instructions.
10	Delete shiftbook	Delete the shiftbook by pressing the X symbol.
11	Shortlist selection	Use the drop-down list to select which entries will be displayed in the shortlist of the event tab. You can have tasks and/or instructions displayed.

11.5 Configuring the Infoboard, Tasks and Instructions tab

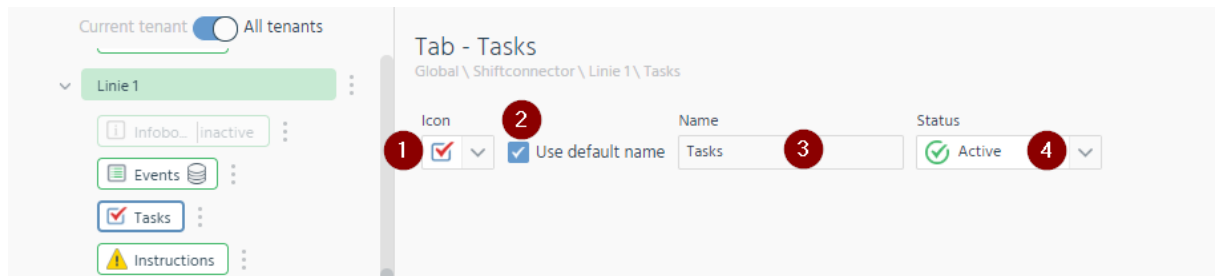


Figure 11.10: Configuring the tasks tab

#	Name	Description
1	Tab icon	Select one of the tab icons.
2	Use default name	Uncheck to rename the tab.
3	Tab name	Name the tab in this field.
4	Tab status	Select the status for the tab. You can select between <i>Active</i> and <i>Inactive</i> .

12 Access rights

12.1 General

From the access Rights menu item you can assign rights to the created groups and roles for different actions or authorizations in different parts of the organizational register. Select an item in the organizational register to display the access rights for the roles or groups in the configuration area.

The screen is divided into two sections:

1. Organizational register
2. Rights assignment

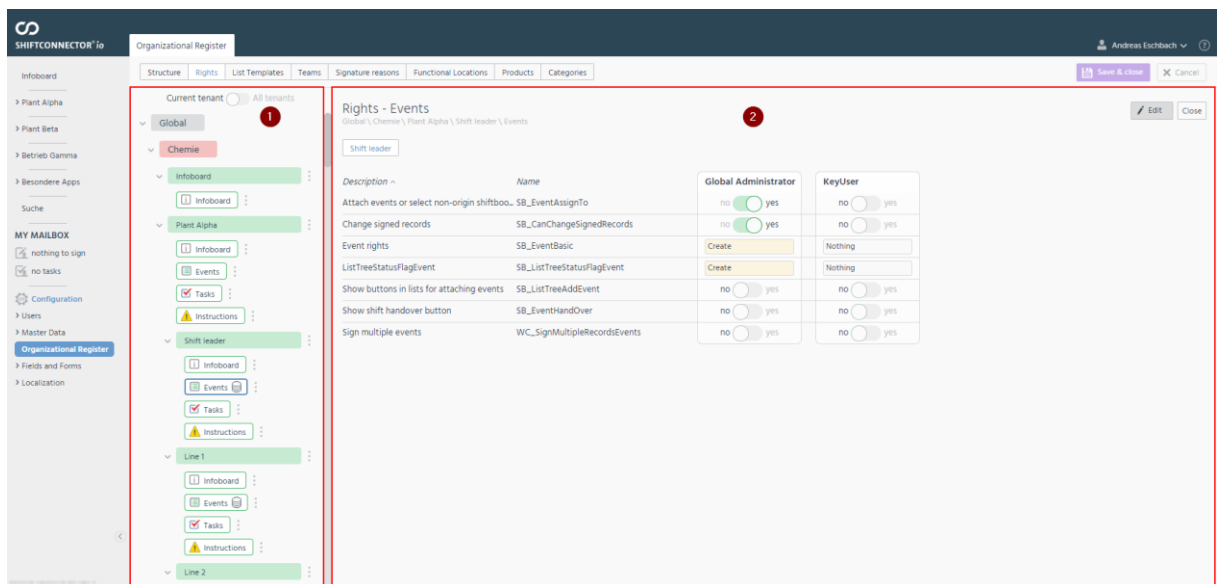


Figure 12.1: Overview of access rights

12.2 Organizational register

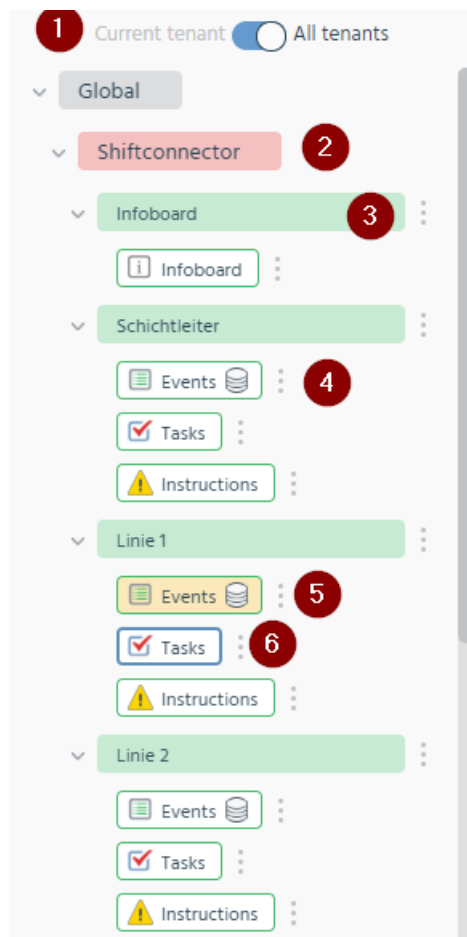


Figure 12.2: Rights assignment organizational register

#	Name	Description
1	Current tenant / all tenants	The button is set to “Current tenant” by default. Set the button to “All tenants” to show all available tenants.
2	Global	From the global item you can assign the cross-tenant access rights to the selected roles. These will then apply to all tenants.
3	Structure item	Under the structure item you can assign structure item rights to the groups.
4	Tab	In the Infoboard, Events, Tasks and Instructions tabs you can assign the specific rights to the groups for the respective tab.
5	Edited item	The edited item is marked yellow as soon as a tab, structure item or global area was edited but the changes have not yet been saved.
6	Selected item	As soon as an item of the organizational register is selected, the rights and the selected groups or roles appear in the assignment area. The selected item is highlighted with a blue border.

12.3 Rights assignment

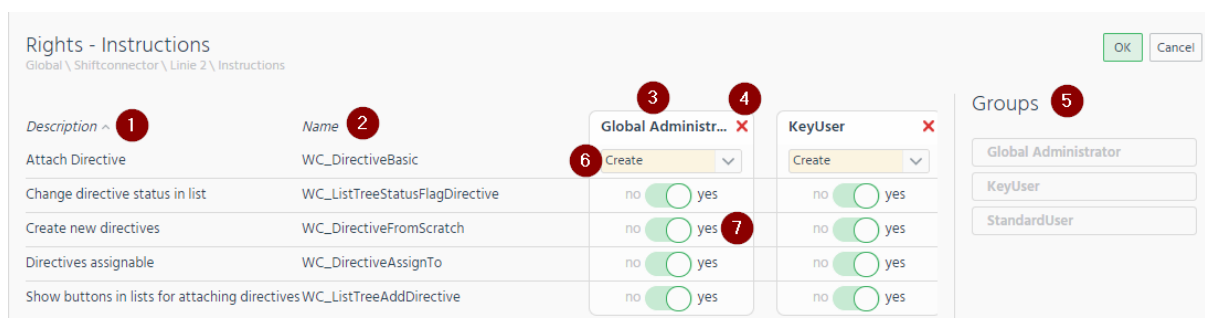


Figure 12.3: Assigning rights

#	Name	Description
1	Description of the right	In the first column is a description of the action or authorisation controlled by the right.
2	Name of the right	The second column shows the name of the right.
3	Added group	Displayed to the right of the name of the rights are all groups or roles.
4	Remove group	Click on the <i>Delete</i> symbol to remove the group or role from the rights assignment.
5	Available groups	All available groups or roles are displayed on the right side of the screen. Click the buttons with the group or role names for which you want to assign rights. The selected groups or roles appear in the middle of the screen.
6	Access rights drop-down	There are five authorization levels that you can assign to the groups or roles for the selected right.
7	Yes/no switch	For rights with a yes/no switch, the authorization can either be activated or deactivated.

12.4 Authorisation levels

None	The user has no authority.
Read	The user is authorized to read the contents.
Edit	The user is authorized to open and edit the items.
Create	The user is authorized to open, edit and create new items.
Delete	The user is authorized to open and edit the items. The user can create and delete items again.

13 Managing roles

13.1 General

Under the *Roles* menu item you can create new roles, edit existing ones and delete unused or new roles. You can also create one or multiple roles that will be available in all tenants and which will have the same rights settings for all tenants. The roles allow you to set which configuration screens can be used and how.

In edit mode, the screen is divided into three sections:

1. Toolbar
2. Role management area
3. Role details

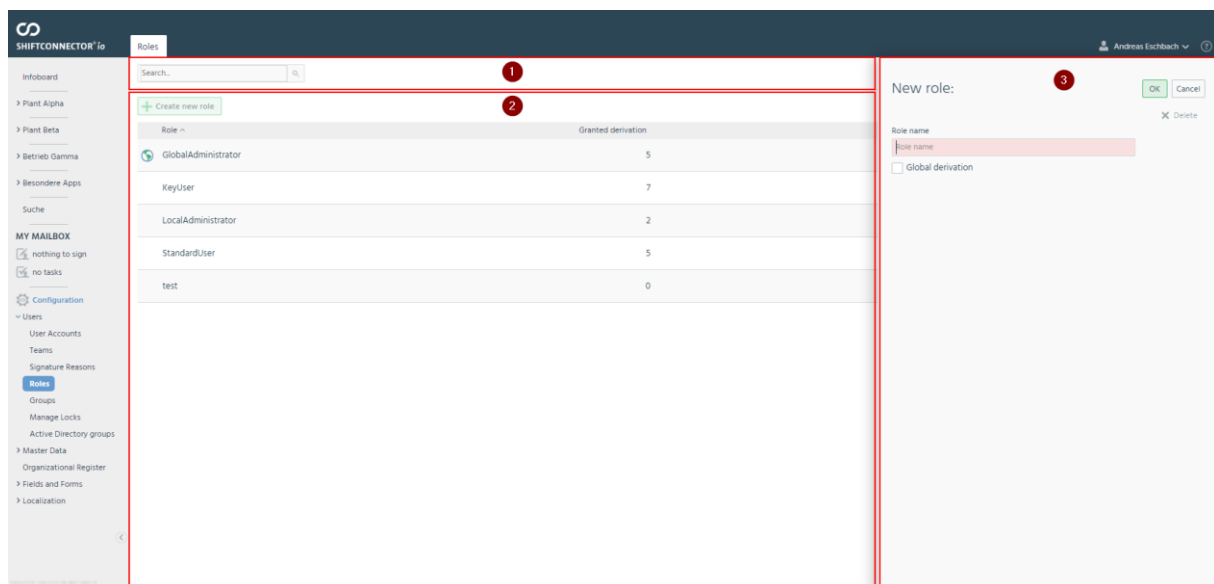


Figure 13.1: Manage roles overview

13.2 Toolbar & role list

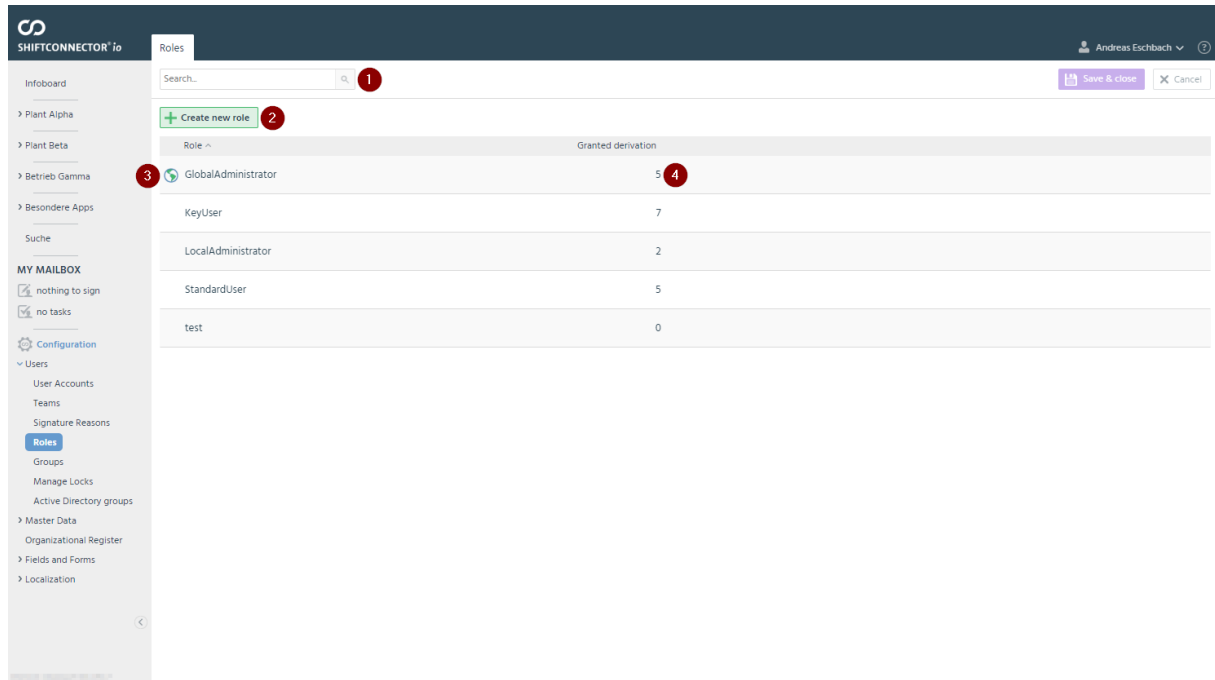


Figure 13.2: Toolbar & role list

#	Name	Description
1	Search field	You can search by a specific role. Please refer to section 29 <i>Ad-hoc search</i> for information on how the search field works.
2	Creating new role	Press the button to open the details pane of the role. Here you can name the role and check the <i>Global derivation</i> box.
3	Global role	A globe symbol is displayed next to roles for which the <i>Global derivation</i> box was checked in the details pane. Global derivation allows the role to create and manage global items.
4	Granted derivation	The number in the <i>Granted derivation</i> column indicates how many groups have been assigned to the role.

13.3 Create new role

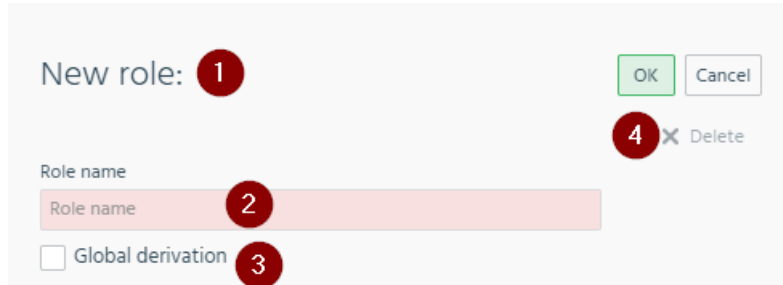


Figure 13.3: Role settings

#	Name	Description
1	Role name	The role name that is entered in text field 2 appears here.
2	Role name	Text field in which you can name the role.
3	Global derivation	Global derivation enables the roles to create and edit global items.
4	Delete role	Press the X symbol to delete the role.

14 Managing groups

14.1 General

In the *Manage groups* menu item you can create new groups, edit existing ones and delete unused or new groups. The settings only apply to the tenant for which the group was created.

In edit mode, the screen is divided into three sections:

1. Toolbar
2. Manage groups area
3. Group details

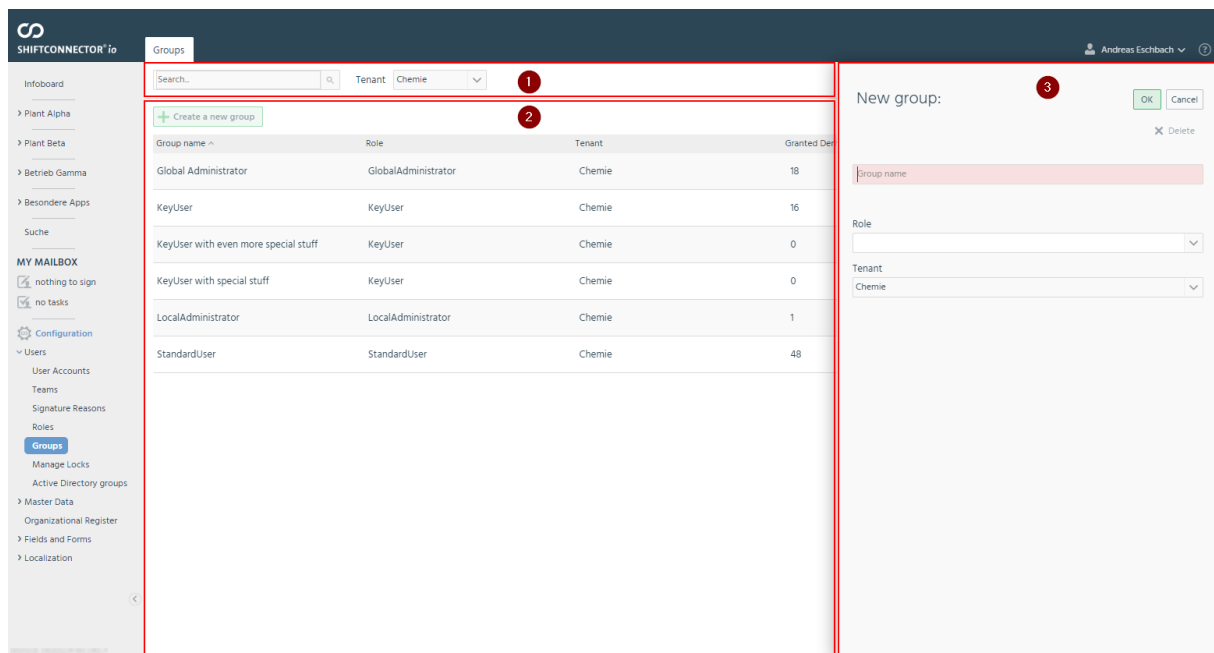


Figure 14.1: Manage groups overview

14.2 Toolbar & group list

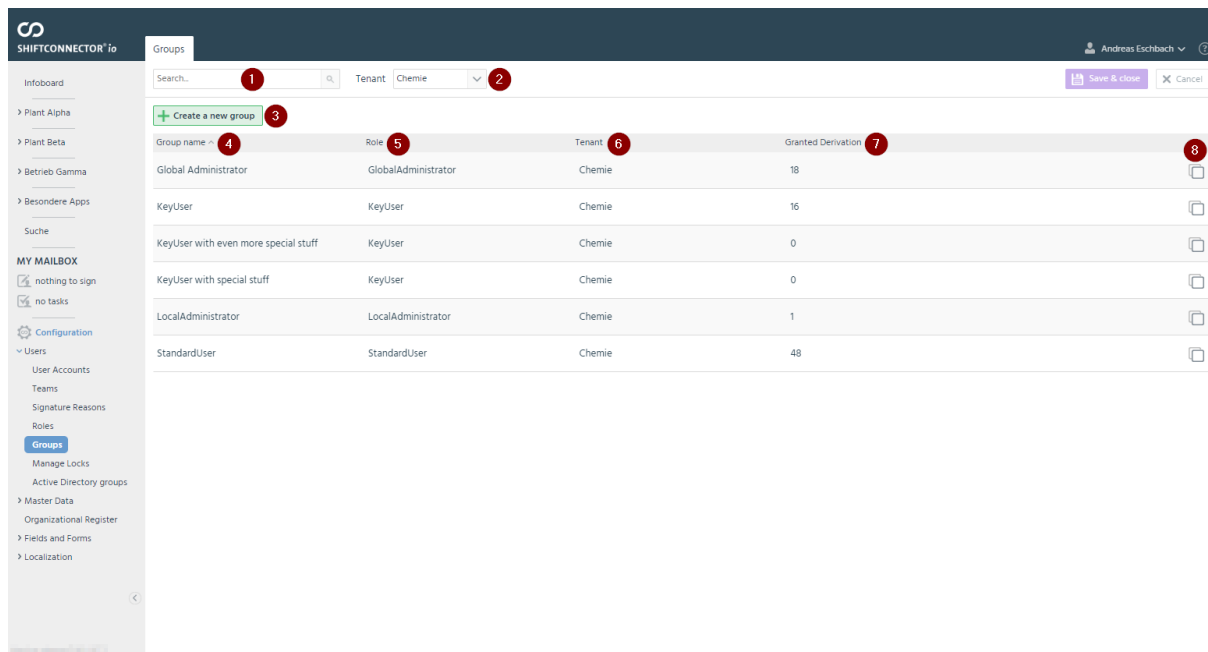


Figure 14.2: Toolbar and group list

#	Name	Description
1	Search field	You can search for a specific group. Please refer to section 29 Ad-hoc search for information on how the search field works.
2	Tenant	Global administrators can view the group lists of other tenants by selecting another tenant from the drop-down list. If another tenant is selected and a new group is created, it is automatically created for the tenant selected in the filter.
3	Create new group	Press the button to open the details pane of the group. Here you can name the group and assign it to a role.
4	Group name	The group name is displayed in the first column.
5	Role	The role assigned to the group is displayed in the second column.
6	Tenant	This column shows to which tenant the group belongs.
7	Derivation	This column shows how many users have been assigned to the group.
8	Copy	Press this button to create a duplicate of the group. The duplicate will have the same group configuration as the original.

14.3 Creating a new group

The screenshot shows a 'New group' dialog box. At the top left, the text 'New group:' is followed by a red circle containing the number 1. To the right are 'OK' and 'Cancel' buttons. Below these is a red circle with the number 2 next to an 'X Delete' button. The main area contains three input fields: a text field for 'Group name' with a red circle 3, a dropdown for 'Role' with a red circle 4, and a dropdown for 'Tenant' with 'Shiftconnector' selected and a red circle 5.

Figure 14.3: Group settings

#	Name	Description
1	Group name	The group name that is entered in text field 2 appears here.
2	Delete group	Press the X symbol to delete the group.
3	Group name	Text field in which you can name the group.
4	Role	Select a role from the drop-down list that is assigned to the group. The group gets the access rights of the role by assigning the role.
5	Tenant	The tenant selected in the tenant filter is preselected in this drop-down list.

15 Managing products

15.1 General

Under the *manage Product* menu item you can create new products and delete existing ones. You can also export the product list via Excel export or import a list with edited or new products via Excel import.

In edit mode, the screen is divided into three sections:

1. Toolbar
2. Product list
3. Product details

The screenshot shows the 'Products' management interface. The left sidebar contains navigation options like 'Plant Alpha', 'Plant Beta', and 'Betrieb Gamma'. The main area is titled 'Products' and features a search bar, a 'Create new product' button, and a table of existing products. The table has columns for 'Product name', 'Product number', 'Maximum output', and 'Maximum avg. output'. The right panel is titled 'New product:' and contains a form for adding a new product, including fields for 'Product name', 'Product number', 'Tenant', 'Maximum output', 'Maximum avg. output', 'Planned scrap', 'Planned rework', and 'Assign to structure items'.

Product name	Product number	Maximum output	Maximum avg. output
A	111	0	
B	222	100	20
C	333	0	
D	444	400	30
E	555	0	
F	666	0	
G	777	0	
H	888	0	
I	999	0	
J	1111	0	
K	2222	0	
L	3333	0	

Figure 15.1: Manage products overview

15.2 Toolbar

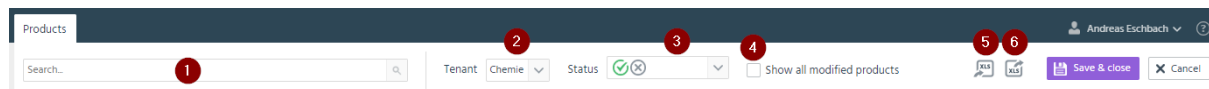




Figure 15.2: Manage products toolbar

#	Name	Description
1	Search field	You can search by a specific product. Please refer to section 29 Ad-hoc search for information on how the search field works.
2	Tenant	Here you can limit the search to one of your selected tenants. The tenant specified when logging in is selected by default.
3	Status	You can filter the product list by the status of the products. Select one or more statuses from the combo box that you want to display. Products with a green icon  have the status <i>Active</i> . Products with a grey icon  have the status <i>Inactive</i> . Both status types are selected by default.
4	Show only processed products	Check the box so that only products that have been processed and not yet saved are displayed.
5	Import Excel list	The button for importing Excel spreadsheets allows you to add multiple products in a single step. Load a preformatted Excel file into the Shiftconnector®.
6	Export Excel list	The Excel export button allows you to download the product list as an Excel file to your computer.

15.3 Product list

Product name ^	Product number	Maximum output	Maximum avg. output	Planned scrap	Planned rework	Status
A	111	0	0	0	0	✓
B	222	100	200	300	400	✓
C	333	0	0	0	0	✓
D	444	400	300	200	100	✓
E	555	0	0	0	0	✓
F	666	0	0	0	0	✓
G	777	0	0	0	0	⊗
H	888	0	0	0	0	⊗

Figure 15.3: Product list

#	Name	Description
1	Create product	Press the button to open the product details pane. There you can name the product and select the status.
2	Product list	List of products of the selected tenants.

15.4 Creating new products

The screenshot shows a 'New product' form with the following elements and callouts:


- 1**: 'New product:' label
- 2**: Status dropdown menu (currently set to 'Active')
- 3**: 'Delete' button with an 'X' icon
- 4**: Product name text input field
- 5**: Product number text input field
- 6**: Tenant text input field (containing 'Chemie')
- 7**: Maximum output text input field (containing '0')
- 8**: Maximum avg. output text input field (containing '0')
- 9**: Planned scrap text input field (containing '0')
- 10**: Planned rework text input field (containing '0')
- 11**: Assign to structure items text input field (containing 'No structure items assigned')

Figure 15.4: Managing products – product settings

#	Name	Description
1	Product name	The product name that is entered in text field 4 appears here.
2	Product status	Select the status for the product. The options are <i>Active</i> , <i>Inactive</i> , <i>Read-only</i> .
3	Delete product	Press the X symbol to delete the product.
4	Text field for the product name	Text field in which you can name the product.
5	Product number	The product number must be entered in the field.

6	Tenant	The tenant selected in the tenant filter is preselected in this drop-down list.
7	Maximum output	Enter the maximum output in this field.
8	Maximum average output	Enter the maximum average output in this field.
9	Planned scrap	Enter the planned scrap in this field.
10	Planned rework	Enter the planned rework in this field.
11	Assign to structure items	You can also assign the products to structure items in a time-saving manner. Press the button and select the structure items in the context menu.

15.5 Creating a product via Excel import

Press the  symbol to open the context menu for importing. Please note that the Excel file must correspond to the specified template. This template can be downloaded from the context menu. You can make the following settings in the context menu:

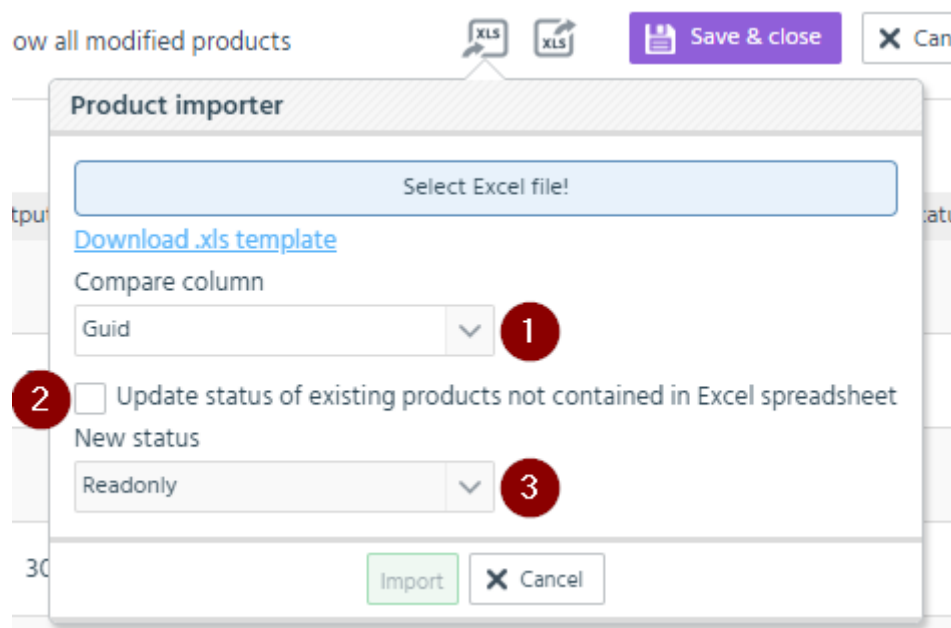


Figure 15.5: Product Excel import

#	Name	Description
1	Compare column	Using the drop-down list, select which column should be used to compare the products that already exist in Shiftconnector® with the new products from the Excel file. The comparison serves to identify which products already exist in the Shiftconnector® and need to be updated.

2	Update status of existing products	Check the box to change the status of existing products that are not in the Excel file.
3	New status	Select the status that the existing products should have after importing.

16 Assigning products

16.1 General

In the *Organizational structure* > *Products* menu item you can assign products to the structure items and overwrite the product data.

In edit mode, the screen is divided into three sections:

1. Organizational register
2. Product assignment area
3. Product details

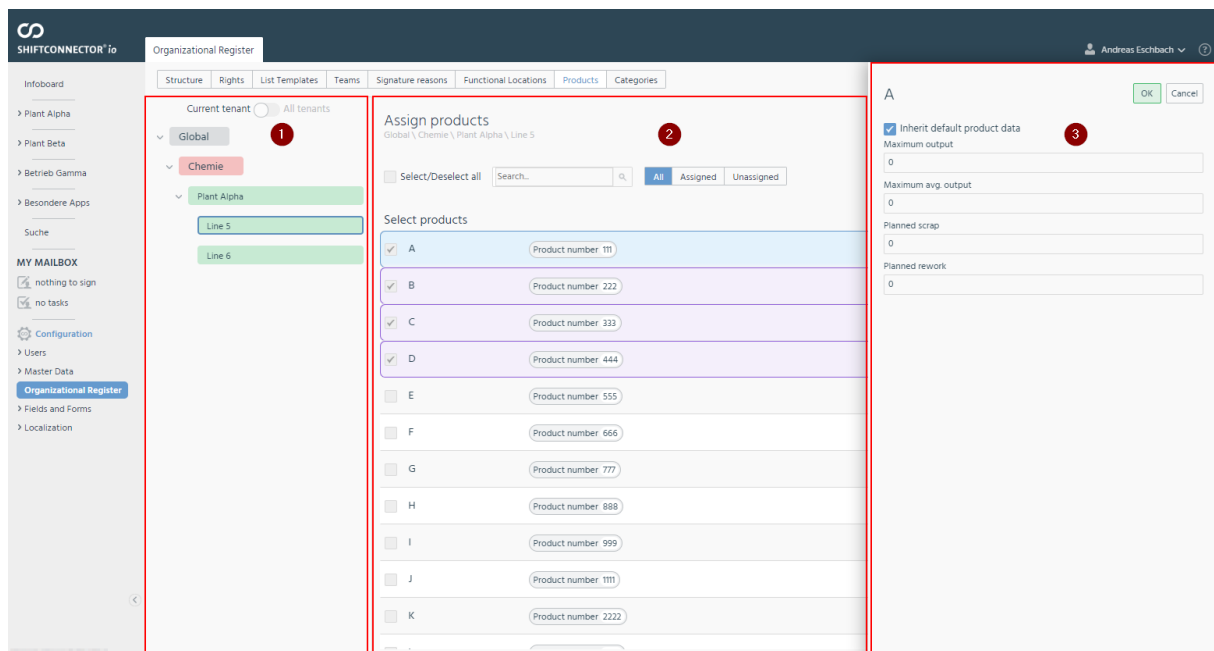


Figure 16.1: Product assignment overview

16.2 Organizational register

The organizational register shows the current tenant and the structure items that have an OEE module installed. When you select a structure item, the product list is displayed on the right side.

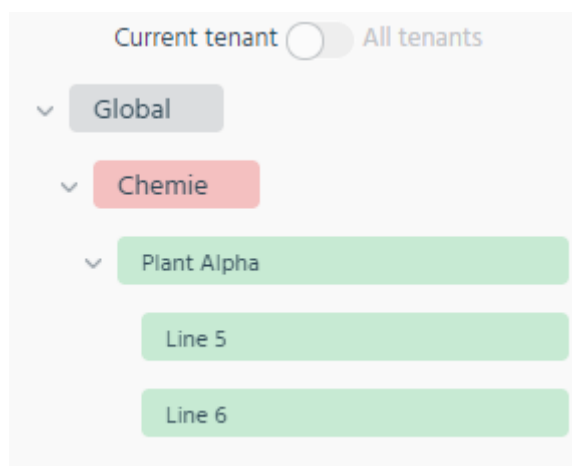


Figure 16.2: Product assignment organizational register

16.3 Product list

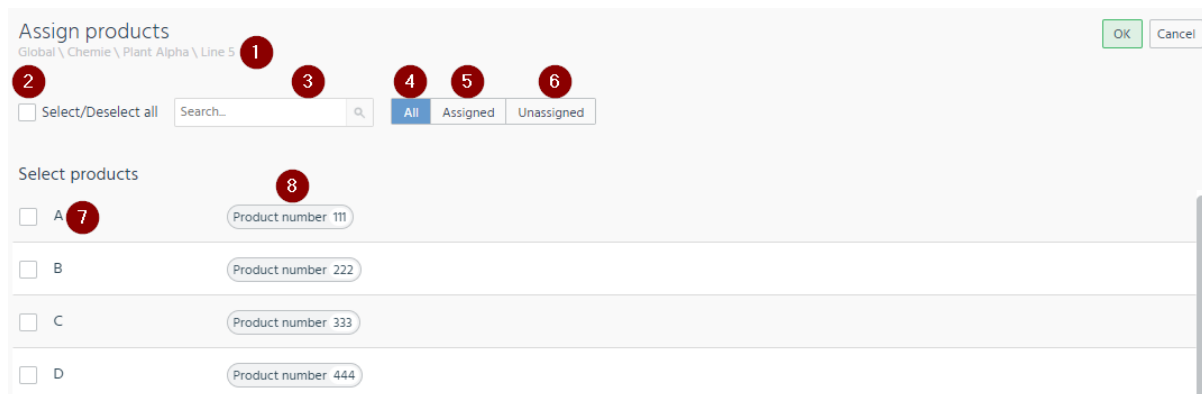


Figure 16.3: Product list

#	Name	Description
1	Structure item	Based on the heading you can see which structure item is selected.
2	Select/deselect all	Here you can select or deselect all products in the product list.
3	Search field	You can search by a specific product. You can search by product name and product number. Please refer to section 29 Ad-hoc search for information on how the search field works.
4	All	All products of this tenant are displayed when you press this button.
5	Assigned	When you press this button, all products that are assigned to the selected structure item are displayed.

6	Not assigned	When you press this button, all products that are not assigned to the selected structure item are displayed.
7	Entry	All products of the current tenant are displayed. When you click on an entry, a side area opens in which you can configure the product.
8	Product number	The product number is displayed as a tag in the line of the product.

16.4 Product assignment detailed view

In the detailed view you can change the data of products that deviate from the standard data.

Figure 16.4: Managing a product – product settings

#	Name	Description
1	Product name	The product name of the selected product is shown here. You cannot change the product name.
2	Inherit standard data	If this box is checked, the data that has been entered for this product under the menu item <i>Manage products</i> applies to the product (standard data). You can change the product data if the box is not checked.
3	Maximum output	Enter the maximum output here.
4	Average output	Enter the maximum average output here.
5	Planned scrap	Enter the maximum output here.
6	Planned rework	Enter the maximum output here.

17 Managing languages

17.1 General

In the *manage Languages* menu item you can add new languages and edit existing ones.

In edit mode, the screen is divided into two sections:

1. Manage languages
2. Language details

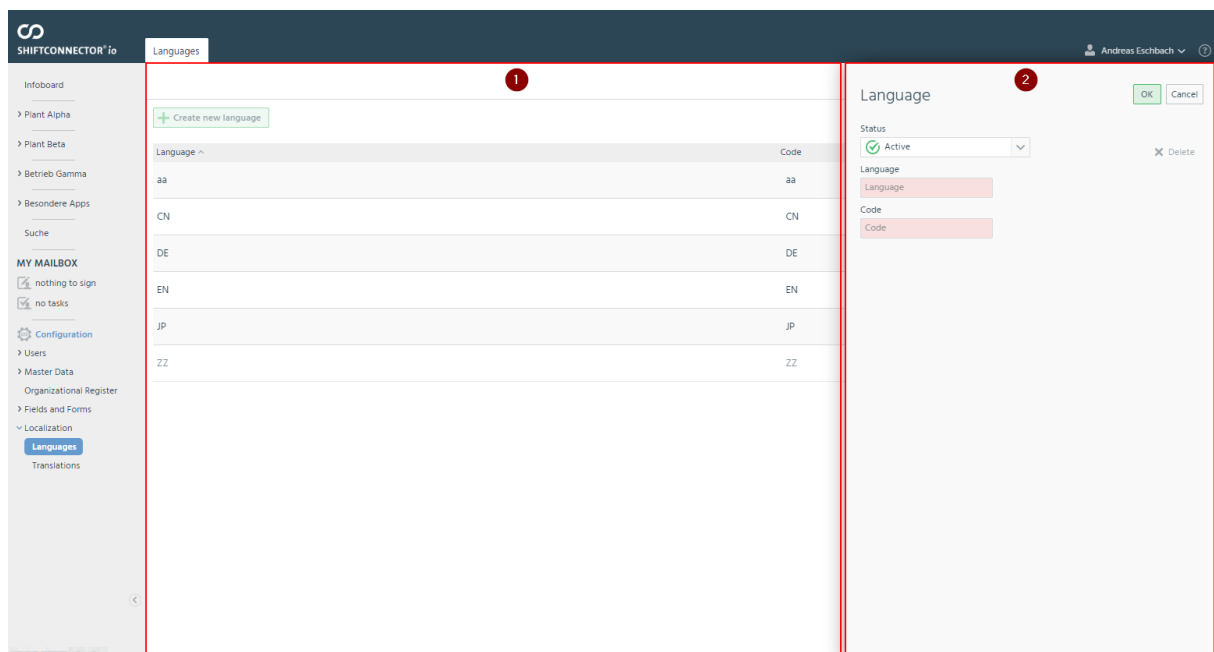


Figure 17.1: Overview of languages

17.2 List of languages

Language	Code	Status
DE	DE	✔
EN	EN	✔
ZZ	ZZ	✔

Figure 17.2: List of languages

#	Name	Description
1	Create new language	Press this button to create a new language.
2	Language	The language is displayed in this column.
3	Code	The code is displayed in this column.
4	Status	<p>The current status of the language is provided in this column. Languages with a green icon ✔ have the status <i>Active</i>. Languages with a grey icon ⊗ have the status <i>Inactive</i>. Please refer to section 30</p> <p><i>Status</i> and their meanings to find out what the different status types mean.</p>

17.3 Creating a new language

After you click the *Create new language* button, a detailed view appears on the right side of the screen in which you can enter the name of the language and the language code. The status can also be selected from a drop-down menu.

Figure 17.3: Creating a new language

#	Name	Description
1	Status	Select the status for the language. You can select from <i>Active</i> and <i>Inactive</i> .
2	Language	Text field in which you can name the language.
3	Code	Text field in which you can enter the code.
4	Delete	Press the X symbol to delete the language.

17.4 Changing the language

To edit a language, you must click in the line of that language. The detailed view now appears on the right side of the screen. The name and status of the language can only be edited after you click on the *Edit* button. You can select between the statuses *Active* and *Inactive*. You can also delete a language, if it is not set for a tenant.

The screenshot shows a detailed view for the language 'DE'. At the top left, the language code 'DE' is displayed. To its right are two buttons: 'Edit' (with a pencil icon) and 'Close'. Below this, the 'Status' section shows a dropdown menu with a green checkmark and the text 'Active', and a small downward arrow to its right. To the right of the status dropdown is a 'Delete' button with an 'X' icon. The 'Language' section contains a text input field with 'DE' entered. The 'Code' section also contains a text input field with 'DE' entered.

Figure 17.4: Changing the language

18 Translations

18.1 General

In the *Translations* menu item you can translate and rename the terms of items in Shiftconnector®. Select the comparison language and the language to be edited.

In edit mode, the screen is divided into two sections:

1. Toolbar
2. List of translations

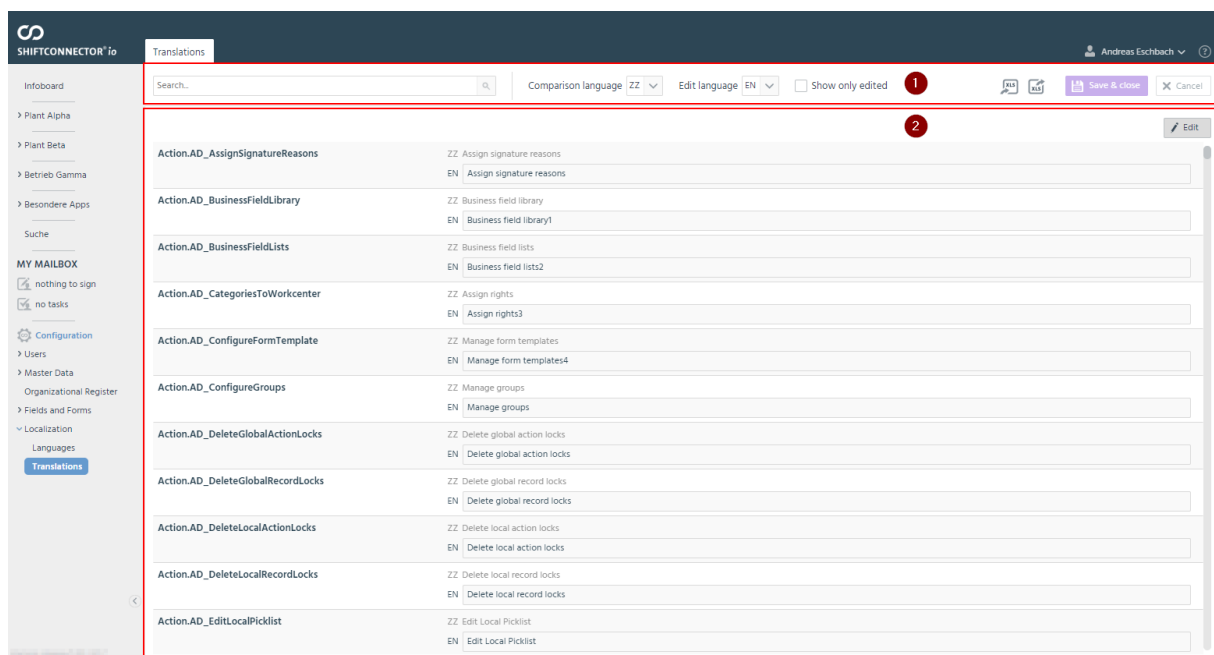


Figure 18.1: Overview of translations

18.2 Toolbar

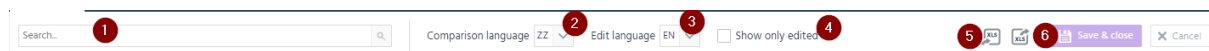


Figure 18.2: Translations toolbar

#	Name	Description
1	Search field	Here you can search for specific translations. You can search by system name, the label in the comparison language and the label in the language to be edited. Please refer to section 29 <i>Ad-hoc</i> search for information on how the search field works.
2	Comparison language	Select a comparison language. You can select from all languages that you have added yourself and the system language ZZ.
3	Language to be edited	Select the language you want to edit here. You can select from all languages that you have added. The system language ZZ cannot be edited.
4	Show only edited entries	Select that only previously edited translations are shown. As soon as you save after editing, the status of the previously edited entries is set to unedited.
5	XLS-Import	The button for the Excel import allows you to import the Excel list of translations.
6	XLS-Export	The Excel export button allows you to download and edit the list of translations as an Excel file to your computer.

18.3 List of translations

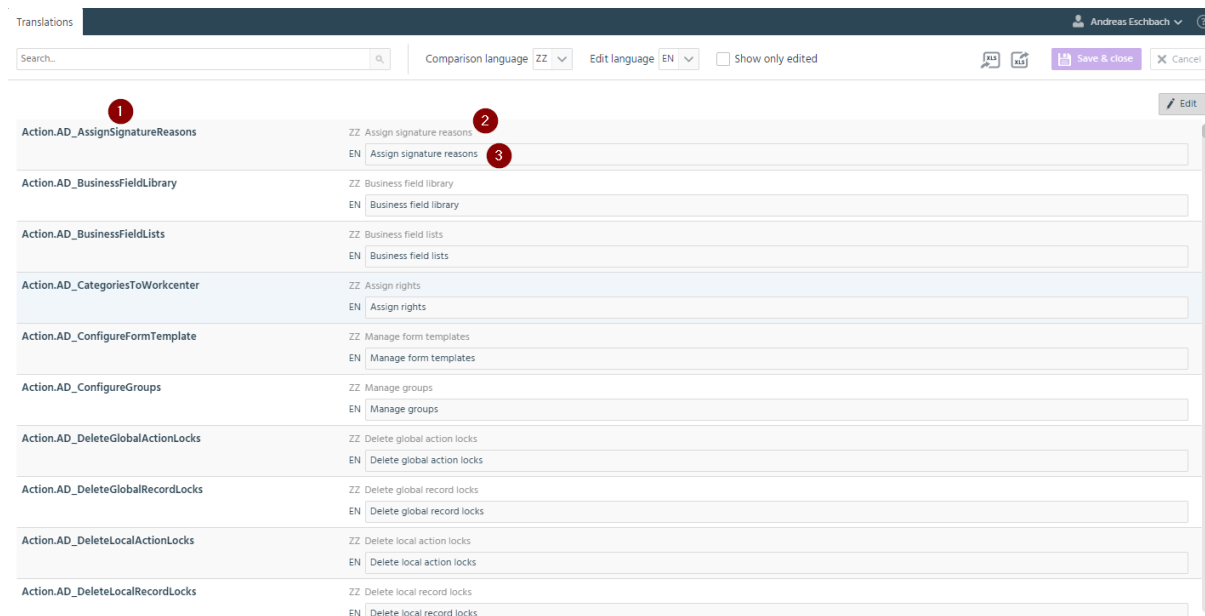


Figure 18.3: List of translations

#	Name	Description
1	System name	The system name is displayed here.
2	Comparison language	The comparison language is displayed above the language to be edited.
3	Language to be edited	You can enter the translation for the language to be edited here. The length is limited to a maximum of 255 characters.

18.4 Importing translations via Excel

After you have clicked on the button for the XLS import, the import window opens. Make sure that the Excel file corresponds to the specified template.

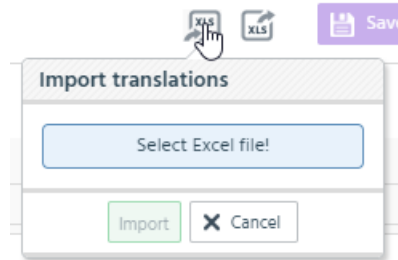


Figure 18.4: Excel import of translations

19 Managing text modules

19.1 General

Under the *manage Text Modules* menu item you can create and manage text modules for events, tasks and instructions.

In edit mode, the screen is divided into three sections:

1. Toolbar
2. Text module list
3. Detail view

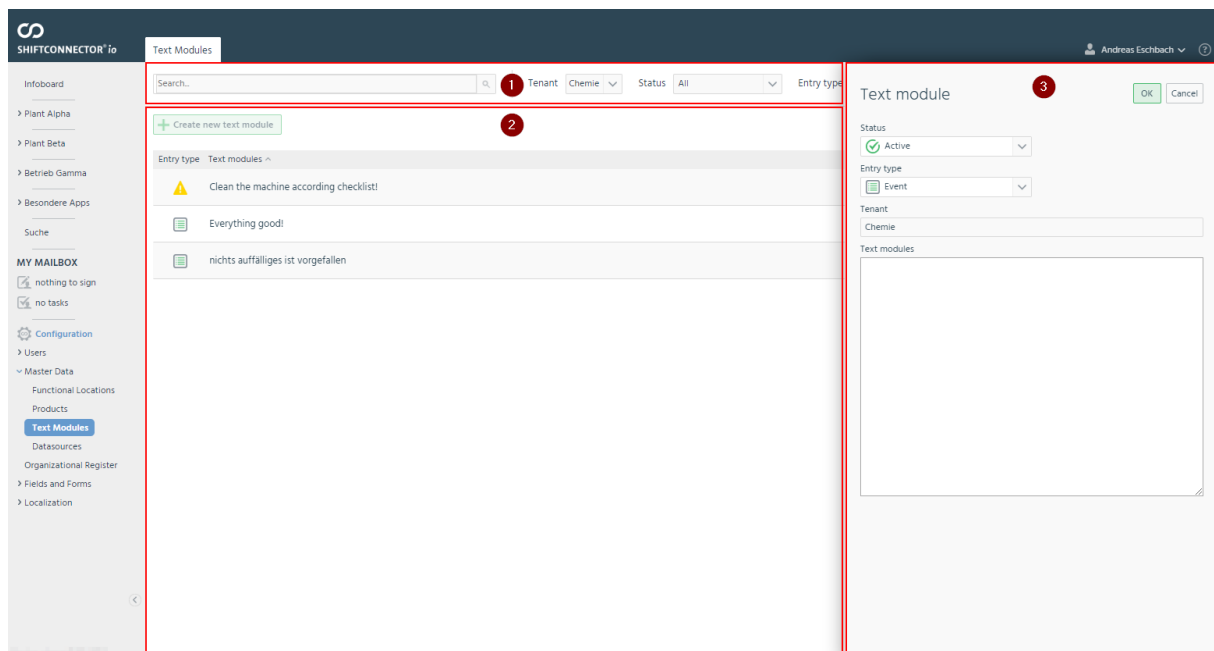


Figure 19.1: Text modules overview

19.2 Toolbar

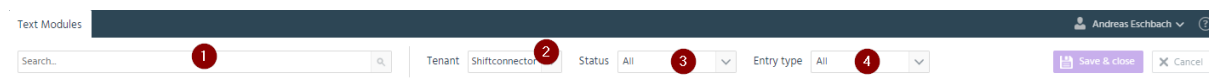




Figure 19.2: Text modules – toolbar

#	Name	Description
1	Search field	The search field allows you to search for a certain text module by entering the text of the text module in the search field. The search is updated with every letter entered.
2	Tenant	With this drop-down list you can filter the text modules by a tenant. This feature is only available to global administrators.
3	Status	With this drop-down list you can filter by status. A text module can have the status <i>Active</i> or <i>Inactive</i> . Please refer to section 30 <i>Status</i> and their meanings to find out what the different status types mean. Multiple choices are possible.
4	Type	Select an entry type from the drop-down list. The list will be filtered according to your selection. Multiple choices are possible.

19.3 Text module list



Figure 19.3: Text module list

#	Name	Description
1	Create new text module	When this button is pressed, the detailed view opens on the right side of the screen. Here you can create a new text module.
2	Type	The icon of the entry type (Event, Task or Instruction) is shown on the left side of each line.
3	Text module	The text of the text module is displayed in the centre of the line.
4	Status	This icon indicates the status of the text module. Text modules with a green icon  have the status <i>Active</i> . Text modules with a grey icon  have the status <i>Inactive</i> . Please refer to section 30 <i>Status and their meanings to find out what the different status types mean.</i>

19.4 Creating a new text module

The screenshot shows a 'Text module' configuration window. At the top right are 'OK' and 'Cancel' buttons. Below the title, there are five numbered red circles pointing to specific UI elements: 1 points to the 'Status' dropdown menu (set to 'Active'), 2 points to the 'Entry type' dropdown menu (set to 'Event'), 3 points to the 'Tenant' text input field (containing 'Chemie'), 4 points to the large text area (containing 'Everything good!'), and 5 points to the 'Delete' button (marked with an 'X').

Figure 19.4: Text module settings

#	Name	Description
1	Status	Select the status of the text module from the drop-down list. You can select between <i>Active</i> and <i>Inactive</i> .
2	Type	Select the entry type (Event, Task or Instructions) of the text module from the drop-down list. After the text module has been saved for the first time, the entry type can no longer be changed.

3	Tenant	In this drop-down list you can see the tenant to which the text module is assigned. By default, the tenant by which the text module list is currently filtered is selected. It is not possible to select other tenants in this section. To change the setting you have to filter by a different tenant in the toolbar.
4	Text	Enter the text of the text module in this text field. The length is limited to a maximum of 2000 characters.
5	Delete	By clicking this button you can delete the text module.

20 Managing Functional Locations

20.1 General

Under the *manage Functional Locations* menu item you can create new functional locations and edit and delete existing ones. You can also change the hierarchy of the structure tree, and the Excel import/export function allows you to import several functional locations at once.

In edit mode, the screen is divided into three sections:

1. Toolbar
2. List of functional locations
3. Detail view

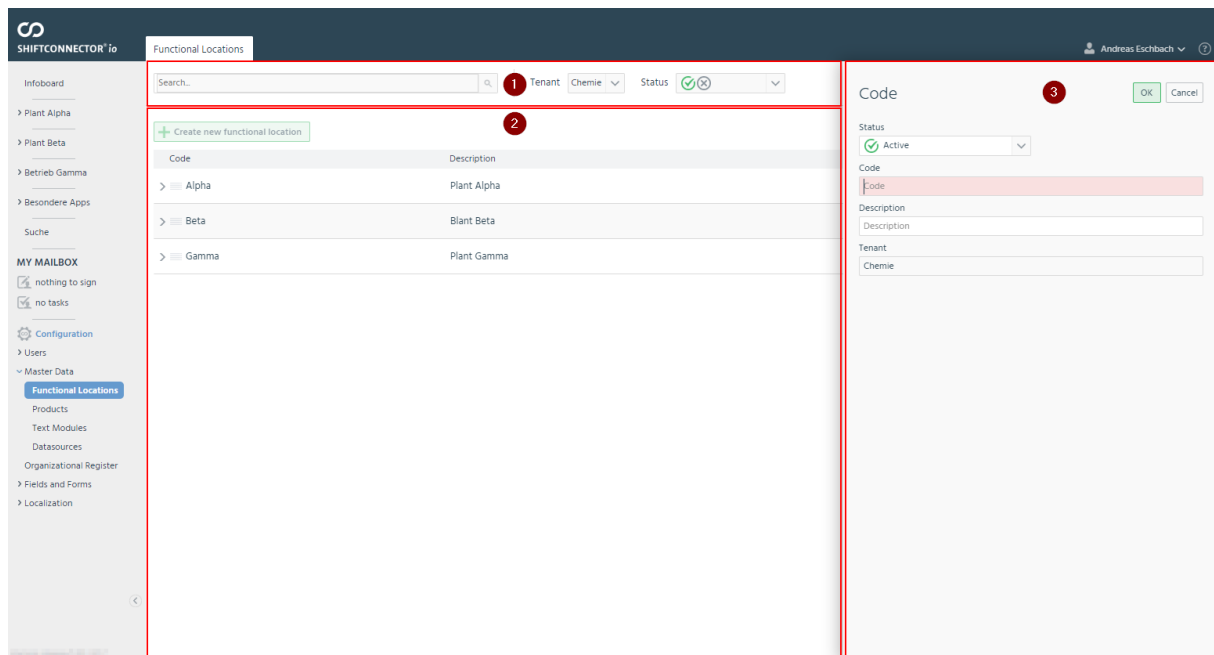


Figure 20.1: Overview of functional locations

20.2 Toolbar

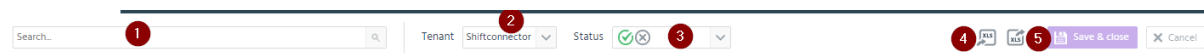


Figure 20.2: Functional locations – toolbar

#	Name	Description
1	Search field	Here you can search for a specific functional location. Please refer to section 29 <i>Ad-hoc</i> search for information on how the search field works.
2	Tenant	With this drop-down list you can filter the list of functional locations by a tenant.
3	Status	With this drop-down list you can filter the list of functional locations by status. A functional location can have the status <i>Active</i> or <i>Inactive</i> . Please refer to section 30 <i>Status and</i> their meanings to find out what the different status types mean. Multiple choices are possible.
4	XLS-Import	This button for importing Excel spreadsheets allows you to add up to 200,000 functional locations at once. Load a preformatted Excel file into the Shiftconnector®. Please refer to section 20.4.2 <i>Creating functional locations via Excel</i> import for information on how to import Excel files.
5	XLS-Export	The Excel export button allows you to export an Excel file that includes all functional locations.

20.3 List of functional locations

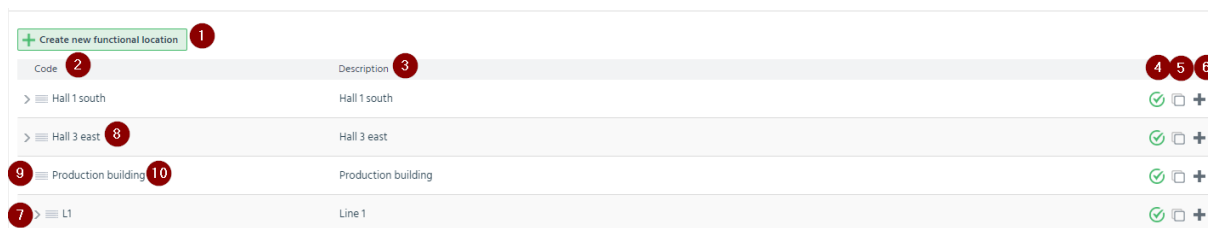





Figure 20.3: List of functional locations

#	Name	Description
1	Creating a new functional location	You can create a new functional location by pressing this button. A new item will appear at the end of the list and a detailed view opens where you can configure the new item.
2	Code	The code of the functional locations is shown here. This is sorted alphabetically according to this code.
3	Description	The description of the functional locations is shown here.
4	Status	This icon indicates the status of the functional location. Functional locations with a green icon  have the status <i>Active</i> . Functional locations with a grey icon  have the status <i>Inactive</i> . Please refer to section 30 <i>Status and their meanings to find out what the different status types mean.</i>
5	Duplicate	You can duplicate a functional location by pressing this button. When you duplicate a functional location that has subordinate items, a duplicate with all subordinate items will be created. This duplicate is shown at the end of the list. When you duplicate a subordinate functional location, this duplicate will appear below the higher-level functional location at the end of the list on the subordinate level. The code of the duplicate is the code of the original with the prefix "Copy of...". The description is the same as that of the original.
6	Add	You can create a new subordinate functional location by pressing the  button. The new item appears at the bottom of all items on the subordinate level. A details pane where you can configure the new item also opens.

		The functional locations can be nested arbitrarily.
7	Drag & drop icon	This icon indicates that you can move the items via drag-and-drop. This enables you to change the hierarchy of the functional locations. Click and hold this icon and drag the line to the new position. The new item is shown with a blue line. This feature is disabled when the side panel for configuring a functional location is open. The sorting cannot be changed, as this always takes place alphabetically.
8	Arrow icon collapsed list	An arrow appears next to the code if a functional location has subordinate functional locations. The icon points to the right when the subordinate items are collapsed ➤.
9	Arrow icon expanded list	An arrow appears next to the code if a functional location has subordinate functional locations. The icon points downwards when the subordinate items are expanded ▼.
10	Entry in list	Clicking on the entry in the list opens the detailed view where you can edit the item.

20.4 Creating new functional location

20.4.1 Create individually

The screenshot shows a configuration form for a functional location named 'Hall 3 east'. The form includes the following fields and controls:

- Status:** A dropdown menu currently set to 'Active' with a green checkmark icon. A red circle with the number '1' is next to it.
- Code:** A text input field containing 'Hall 3 east'. A red circle with the number '3' is next to it.
- Description:** A text input field containing 'Hall 3 east'. A red circle with the number '4' is next to it.
- Tenant:** A text input field containing 'Shiftconnector'. A red circle with the number '5' is next to it.
- Buttons:** 'OK' and 'Cancel' buttons are at the top right. A 'Delete' button with a red 'X' icon is located to the right of the Status dropdown. A red circle with the number '2' is next to the Delete button.

Figure 20.4: Creating functional locations individually

#	Name	Description
1	Status	Select the status of the functional location from the drop-down list. You can select between <i>Active</i> , <i>Inactive</i> and <i>Read-only</i> . Please refer to section 30

		<i>Status</i> and their meanings to find out what the different status types mean.
2	Delete	You can delete a functional location by pressing this button. If you delete a functional location with a sub-item, the sub-items are also deleted.
3	Code	Enter the code of the functional location in this text field. The length of the code is limited to 100 characters. This field is mandatory and must be filled in.
4	Description	You can enter the description of the functional location in this text field. The length of the description is limited to 500 characters. This field is optional.
5	Tenant	In this drop-down list you can see the tenant to which the functional location is assigned. The tenant by which the list of functional locations is currently filtered is defined here. It is not possible to select other tenants in this section. To change the setting, you must filter by a different tenant in the toolbar.

20.4.2 Creating functional locations via Excel import

After you have clicked on the button for the XLS import, the import window opens. Please note that the Excel file must correspond to the specified template. The template can be downloaded in the window. You can also change the settings for the import.

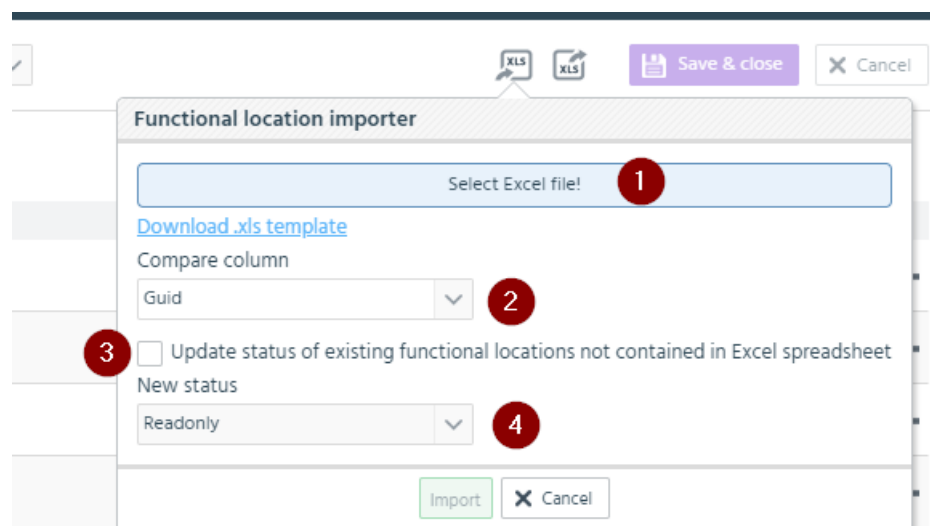


Figure 20.5: Excel import of functional locations

#	Name	Description
1	Compare column	With this drop-down list you can select in which column the items that already exist in Shiftconnector® are compared to the new items from the Excel file. The comparison serves to identify which functional locations already exist in Shiftconnector® and need to be updated.
2	Update functional locations	Check the box to change the status of existing functional locations that are not in the Excel file.
3	New status	This drop-down list allows you to select the status of the functional items that already exist in Shiftconnector® after importing.

21 Assigning functional locations

21.1 General

In the *Organizational Register* > *Functional Locations* menu item you can assign functional locations to structure items.

In edit mode, the screen is divided into two sections:

1. Organizational register
2. List of functional locations

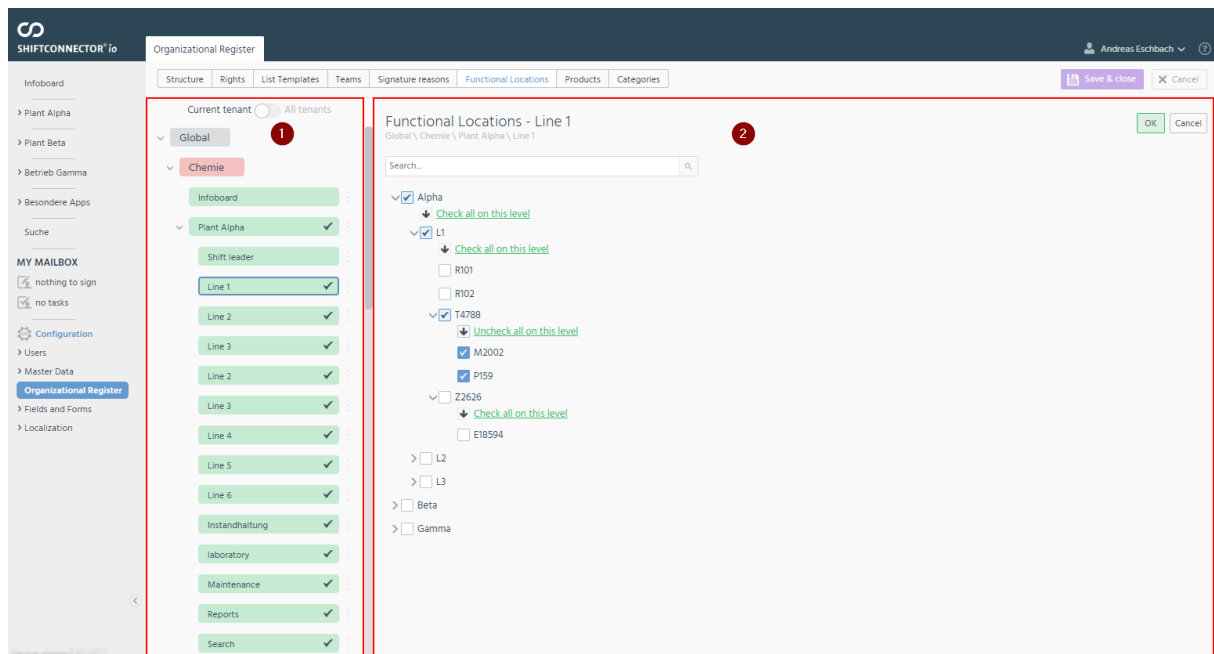


Figure 21.1: Overview of functional location assignment

21.2 Organizational register

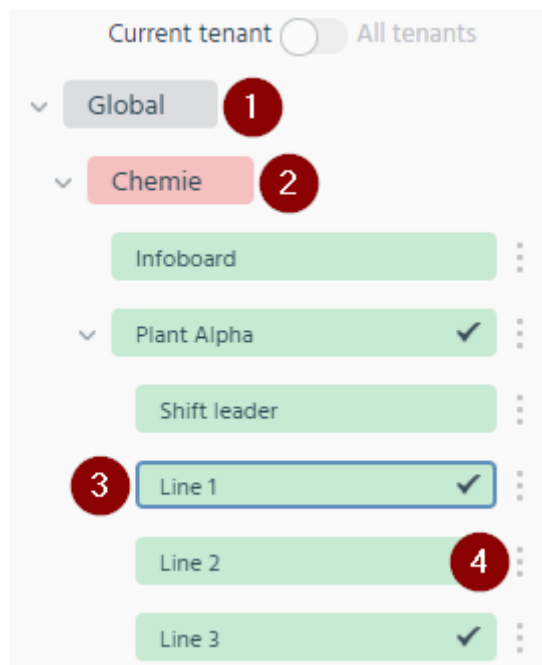



Figure 21.2: Assign functional locations – organizational register

#	Name	Description
1	Global element	You cannot assign any functional locations to this organizational item.
2	Tenant	You cannot assign any functional locations to the tenant.
3	Selected structure item	When you click on a structure item it is selected and a list of assigned functional locations is displayed on the right side.
4	Context menu	Selecting the  symbol will open a small context menu. This allows you to copy the selected functional locations of a structure item to another structure item.

21.3 List of functional locations

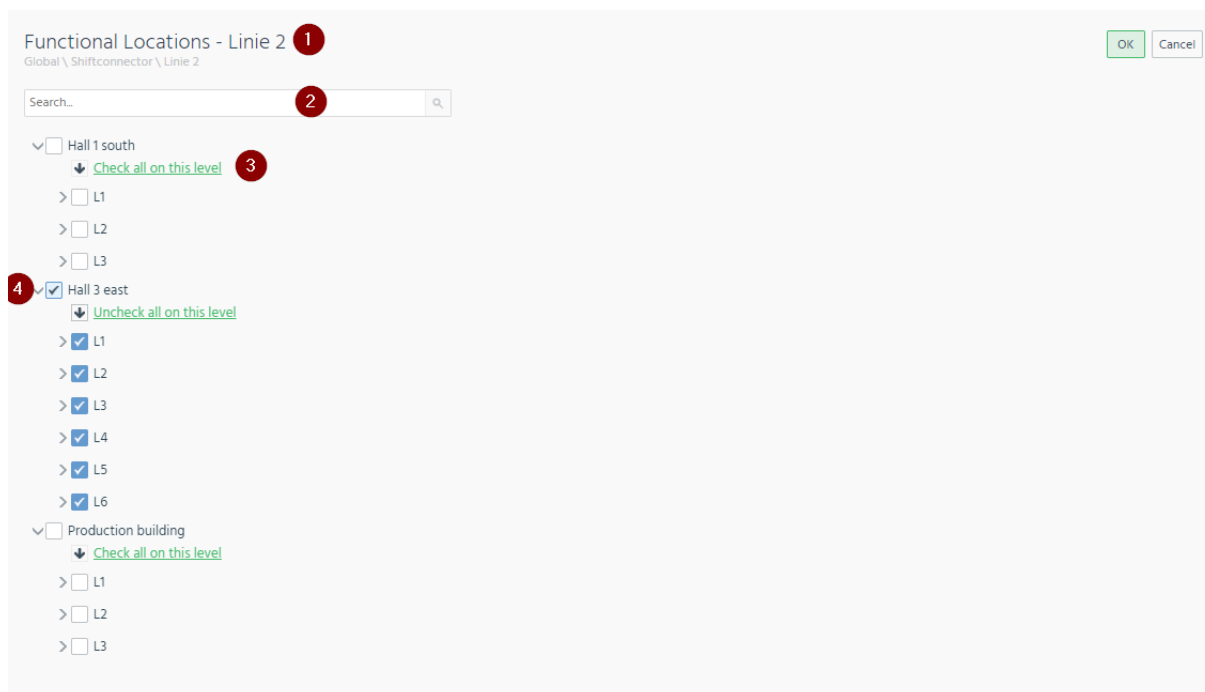


Figure 21.3: Assigning functional locations

#	Name	Description
1	Selected structure item	Based on the heading you can see which structure item is selected.
2	Search field	Here you can search for a specific functional location. The list will expand up to the searched item, allowing you to see the path to the functional location that you have searched for.
3	Select/deselect all	This button allows you to simultaneously select or deselect all items on this level.
4	Arrow icon	By clicking on this icon, you can expand or collapse the subordinate items.

22 Managing priorities

22.1 General

Under the *manage Event Priorities* menu item you can add your own priorities in addition to the system priorities.

The screen is divided into three sections:

1. Toolbar
2. List of priorities
3. Detail view

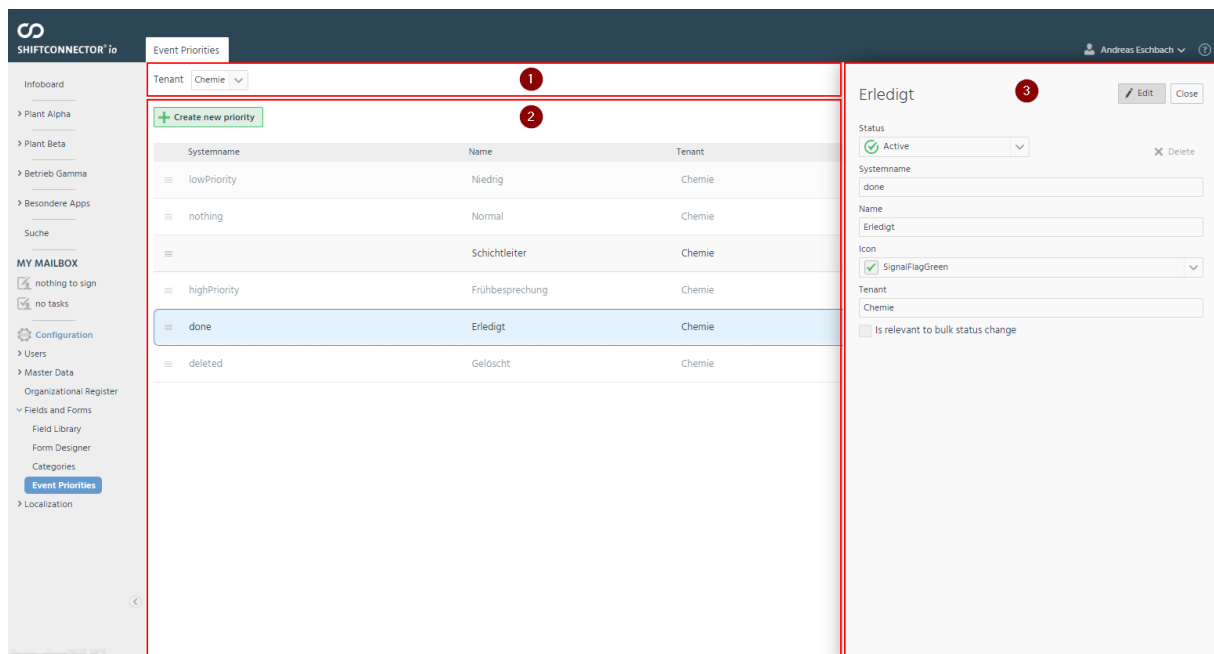


Figure 22.1: Overview of priorities

22.2 Toolbar

In the toolbar you can filter the priority list for a tenant. Global administrators can select from all tenants. Local administrators can select from the tenants they are assigned to.



Figure 22.2: Managing users – toolbar

22.3 List of priorities

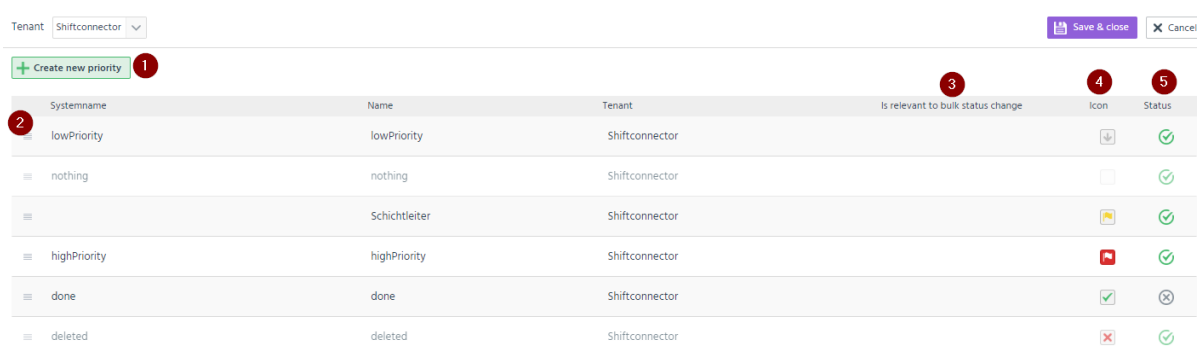




Figure 22.3: List of priorities

#	Name	Description
1	Creating a new priority	Click this button to create a new priority. A new item will appear at the end of the list and a detailed view opens, where you can configure the new item.
2	Drag & drop icon	This icon indicates that you can move the items via drag-and-drop. You can arrange the priority according to your preferences. Click on this icon and drag the line to the new position. The new item is shown with a blue line.
3	Relevant for bulk status change	Here you can see if the priority for bulk status changes is relevant. When the box is checked <input checked="" type="checkbox"/> you can simultaneously change the priorities of multiple items.
4	Icon	The symbol which is set for the priority is displayed here.
5	Status	The status of the priority is displayed here. Priorities with a green icon  have the status <i>Active</i> . Priorities with a grey icon  have the status <i>Inactive</i> . Please refer to section 30 <i>Status and their meanings to find out what the different status types mean.</i>

22.4 Creating a new priority

The screenshot shows a 'Priority settings' dialog box with the following elements:

- 1** Priority name (Title bar)
- 2** Status: Active (Dropdown menu)
- 3** Systemname: Systemname (Text input)
- 4** Name: Name (Text input)
- 5** Icon: Nothing (Dropdown menu)
- 6** Tenant: Shiftconnector (Text input)
- 7** Is relevant to bulk status change (Checkbox)

Figure 22.4: Priority settings

#	Name	Description
1	Priority name	The name of the selected priority is displayed here.
2	Status	Select the status of the priority. You can select between the statuses <i>Active</i> and <i>Inactive</i> . Please refer to section 30 <i>Status and their meanings to find out what the different status types mean.</i>
3	System name	Enter the system name of the priority in this field. The length of the system name is limited to 100 characters. This field is optional.
4	Name	Enter the name of the priority in this field. The length of the name is limited to 100 characters. This field is required and must be filled in.
5	Icon	Select an icon for the priority with this drop-down list. Selecting an icon is optional.
6	Tenant	In this drop-down list you can define the tenant by which the list of priorities is currently filtered. It is not possible to select other tenants in this section. To change the setting, you must filter by a different tenant in the toolbar.

7	Relevant for bulk status change	Here you can see if the priority for bulk status changes is relevant. When the box is checked ✓ you can simultaneously change the priorities of multiple entries.
8	Delete	By clicking this button you can delete the priority. System priorities or priorities that have already been used in an entry cannot be deleted.

23 Field library

23.1 General

Under the *Field Library* menu item you can create, configure and delete fields of all types. In addition to the fields you have created there are system fields.

The screen is divided into three sections:

1. Toolbar
2. List of all fields
3. Detail view

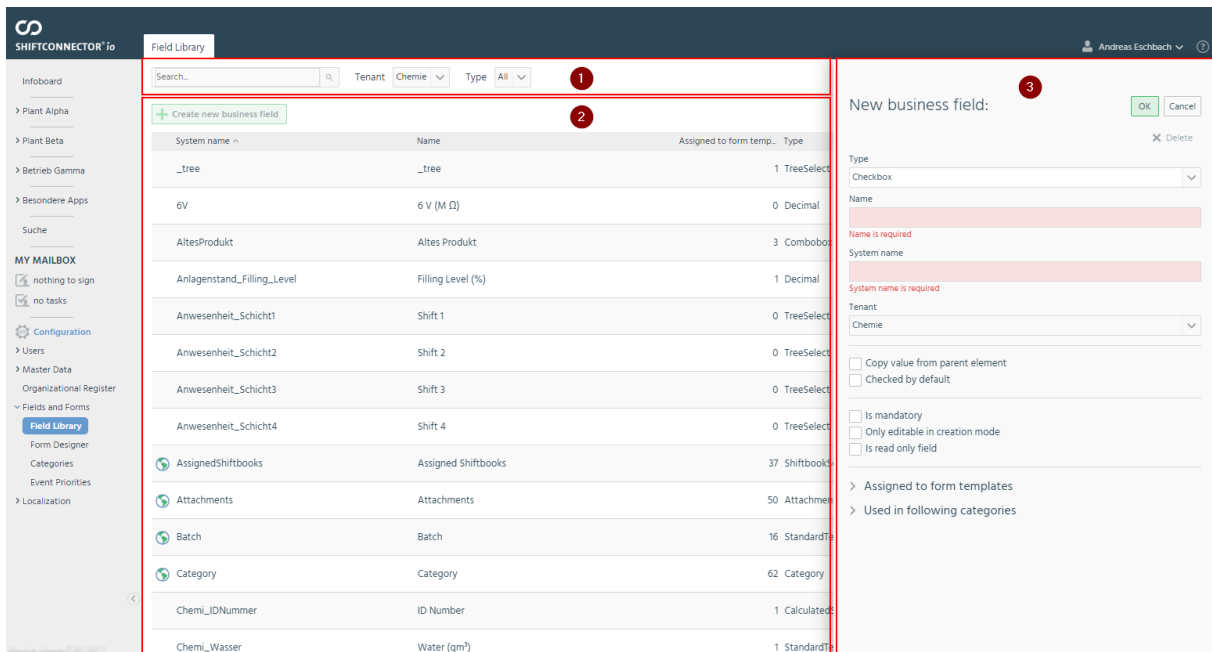


Figure 23.1: Field library overview

23.2 Toolbar



Figure 23.2: Manage fields – toolbar

#	Name	Description
1	Search field	Enter the field name in this field to search for it. Please refer to section 29 Ad-hoc search for information on how the search field works.
2	Tenant	With this drop-down list you can filter the list of the fields by the tenant.
3	Type	With this drop-down list you can filter the list of the fields by the field type.

23.3 List of fields

System name	Name	Assigned to form templ.	Type
AssignedShiftbooks	Assigned Shiftbooks	5	ShiftbookSelect
Attachments	Attachments	4	Attachment
Batch	Batch	1	StandardText
Category	Category	5	Category
CreationUser_LastEditUser	Erstellt/Geändert von	0	CalculatedString
Description	Description	5	DescriptionWithAutoComplete
DirectiveAssignedWorkcenter	Workcenter	1	DirectiveWorkcenterSelect
DirectiveDateTime	Date Time Range	1	DirectiveDateTimeRange
DirectiveStatus	Status	1	DirectiveStatus
DueDate	Fälligkeitsdatum	1	DueDateRecurrence
EIT_Verbesserungsvorschlag_Prio	Wichtigkeit	1	Combobox
EIT_Verbesserungsvorschlag_Status	Status	1	Combobox

Figure 23.3: Field list

#	Name	Description
1	Create new field	Press this button to create a new field. A new item will appear at the end of the list and a detailed view opens where you can configure the field.
2	System name	Here you can see the system name of the field. The system name cannot be changed after it has been created.
3	Name	Here you can see the name of the field.
4	Assigned to form templates	Here you can see how many form templates the field is assigned to.
5	Type	The field type is displayed in this column.

23.4 Creating a field

When you create a new field, the detailed view where you can configure the field opens. This area is shown in the following screenshot. After you have selected a field type, the area will adapt and display other configuration items if applicable.

Figure 23.4: Creating a field

#	Name	Description
1	Type	Select the field type from the drop-down list. This field is required and must be filled in.
2	Name	Enter the name of the field in the field. The length of the name is limited to 100 characters. This field is required and must be filled in.
3	System name	Here you can enter the system name of the field. The length of the system name is limited to 100 characters. This field is required and must be filled in.
4	Tenant	With this drop-down list you can select the tenant to which the field is to be assigned. This feature is only available to global administrators. This field is required and must be filled in.
5	Delete	You can delete the field by pressing this button. You can only delete fields that have never been used in a form template and which are not system fields.

The following describes the additional configuration items that appear with all field types. Configuration items may, however, deviate from each other as each field type is different from one another.

The screenshot shows the 'Attachments' configuration form. It includes fields for 'Type' (Attachment), 'Name' (Attachments), 'System name' (Attachments), and 'Tenant' (Global). Below these are several checkboxes: 'Copy value from parent element' (1), 'Is mandatory' (2), 'Only editable in creation mode' (3), 'Is read only field' (4), and 'Allow multi selection'. There are also two expandable sections: 'Assigned to form templates' (5) and 'Used in following categories' (6), each containing a list of template and category names.

Figure 23.5: Manage field – additional configuration items

#	Name	Description
1	Copy value from parent item	Select if the content of the field is copied when applying an event, task or instruction to another entry. If you check this box, the field in the entry to be appended gets the same content as the field in the existing entry.
2	Is mandatory	Check this box if the field should be a mandatory field. If you check this box, the field must be filled out when creating an entry. The checkbox in ⁴ cannot be selected if the field is set as a mandatory field.

3	Only editable in creation mode	<p>Select whether the content of this field can only be defined when creating an entry. If you check this box, the content of this field cannot be changed after saving.</p> <p>The checkbox in 4 cannot be selected if the field can only be edited when created.</p>
4	Is read only field	<p>Select if the field should be read-only. If you check the box, the content can only be read but not changed.</p> <p>The checkboxes in 2 and 3 cannot be selected if the field is read-only.</p>
5	Assigned to form templates	<p>Click on the arrow to find out to which forms the field was assigned. By default, the list is collapsed and the arrow points to the right >. You can expand the list by clicking. The arrow will then point down ▼. The tag shows the respective tenant and form templates to which this field is assigned.</p>
7	Used in following categories	<p>You can see here to which categories the form templates that contain this field have been assigned. By default, the list is collapsed and the arrow points to the right >. You can expand the list by clicking. The arrow will then point down ▼. The tag displays the respective tenant and categories in which this field is used.</p>

24 Managing Form Designer

24.1 General

The *manage Form Designer* menu item provides an overview of all forms. You can create new forms and edit or copy existing ones.

The screen is divided into four sections:

1. Toolbar
2. List of form templates
3. Form template details
4. Field details

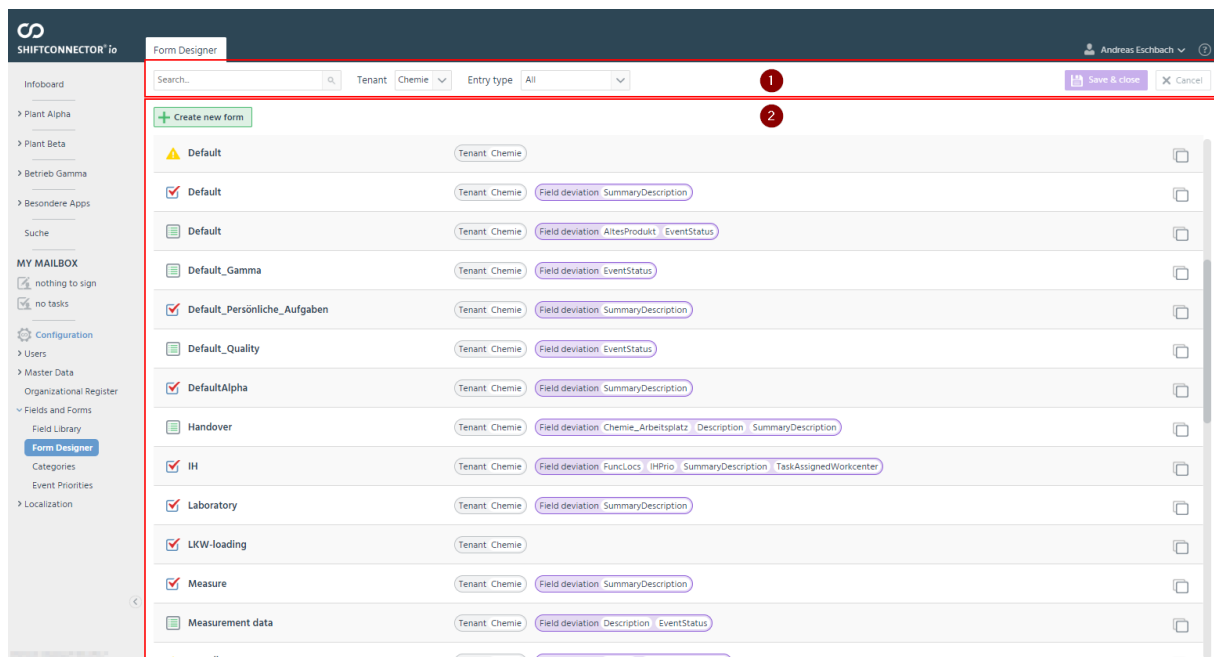


Figure 24.1: Overview of form templates

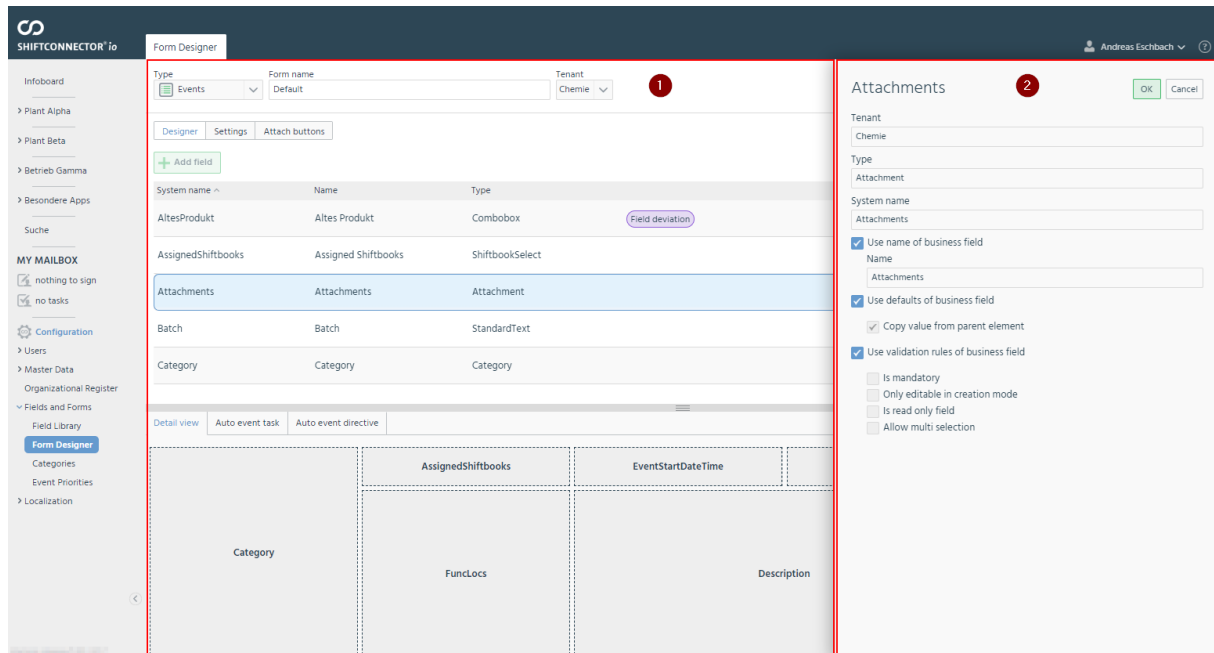


Figure 24.2: Detailed view of a form template

24.2 Toolbar



Figure 24.3: Manage form templates – toolbar

#	Name	Description
1	Search field	Enter the name of the form to search for it. Please refer to section 29 <i>Ad-hoc</i> search for information on how the search field works.
2	Tenant	This drop-down list allows you to filter all fields by a tenant. This feature is only available to global administrators.
3	Type	This drop-down list allows you to filter by entry type (event, task or instruction). Multiple choices are possible.

24.3 List of form templates

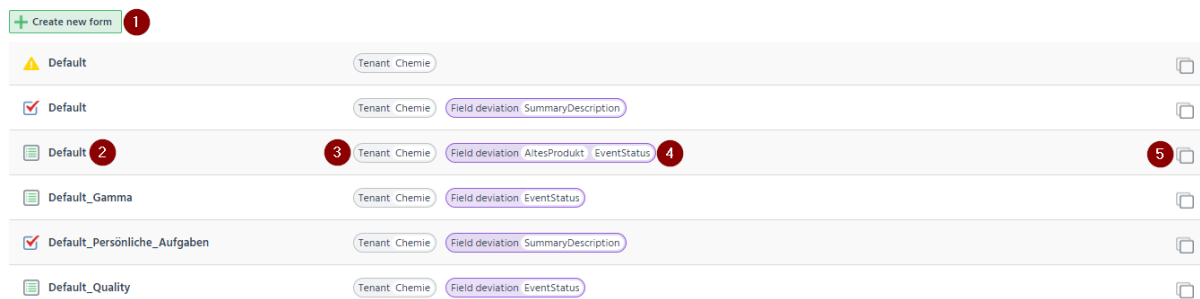


Figure 24.4: Form template list

#	Name	Description
1	Create new form	Click this button to create a new form template. A new item will appear at the end of the list and a detailed view opens where you can configure the new item.
2	Name of the form template	The name of the form template is shown here.
3	Tenant	This tag indicates for which tenant the form template is available.
4	Deviations	If a field is displayed here, the settings defined for this field in the field library have been overwritten in the form template. However, these settings only apply to this form template.
5	Copy	Click this button to copy a form template. A copy has the same configuration as the original item. The name of the duplicate is the name of the original item plus the suffix "Copy of".

24.4 Form template details

After clicking on a form template, details about the form template are displayed on the main screen. You can now configure the form template according to your preferences.

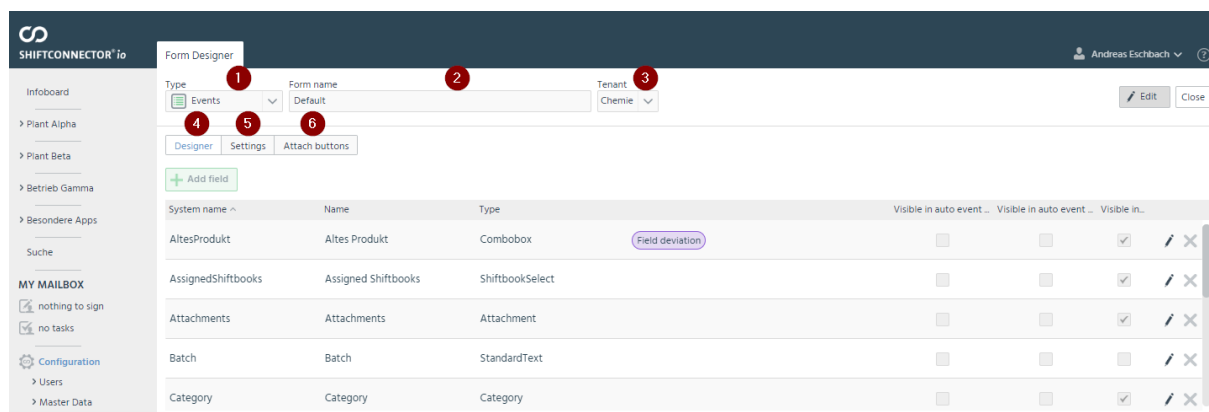


Figure 24.5: Form details – default settings

#	Name	Description
1	Type	This drop-down list allows you to select the entry type (event, task or instruction) of the form template. The entry type cannot be changed for the saved and copied form templates.
2	Name of the form template	Enter the name of the form template in this field. The length of the name is limited to 100 characters.
3	Tenant	This drop-down list shows the tenant to which the form template is assigned. This is where you can define the tenant by which the list of form templates is currently filtered. It is not possible to select other tenants in this section. To change the setting, you have to filter by a different tenant in the toolbar.
4	Designer	In the designer tab you can define the content and appearance of the form template and auto events.
5	Settings	In the settings tab you can set parameters for creating and editing entries.
6	Attach button	In the attach buttons tab you can define the attachment icons that can be seen in the detailed view and/or the list.

24.4.1 Designer

In the designer tab you can see the list of all fields that have been added to the form template along with a preview of how the form template and auto events will look.

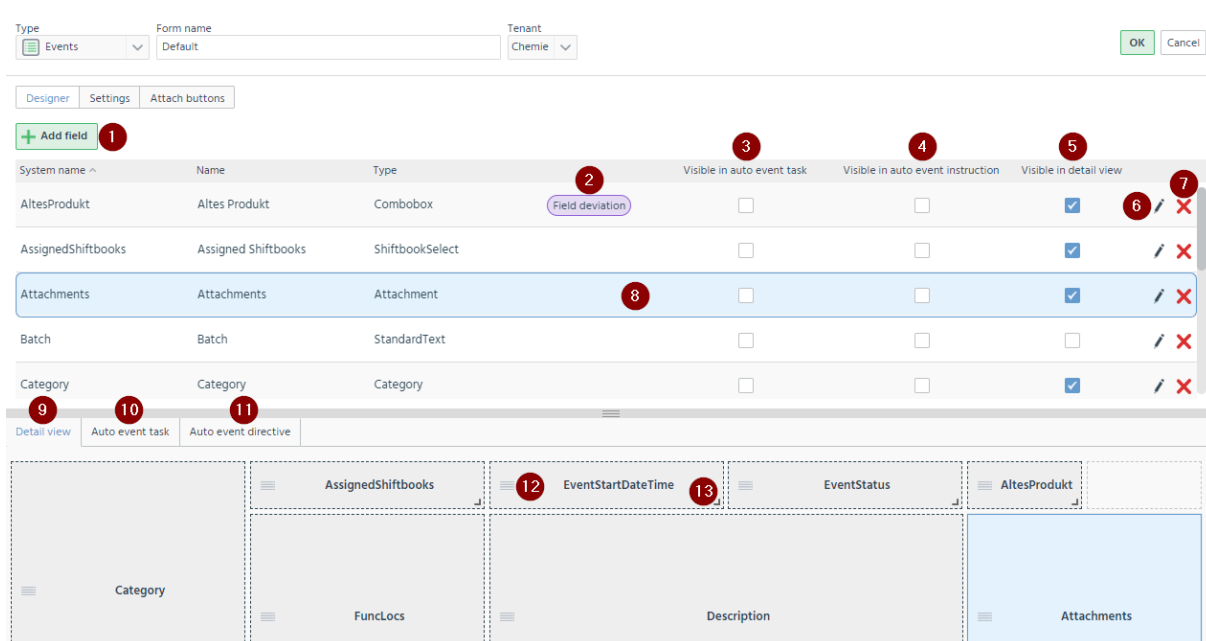



Figure 24.6: Designing a form

#	Name	Description
1	Add field	Press the button to add a new field to the form template. When you press the button, a window opens in which all fields available for this tenant can be selected.
2	Deviations	If a tag is displayed here, the settings from the field library for the selected form template have been overwritten.
3	Visible in auto event task	Check the box to display the field in the auto events of tasks.
4	Visible in auto event instruction	Check the box to display the field in the auto events of instructions.
5	Visible in...	Select if this field should be visible in the currently selected form template.
6	Edit	Press the button to open the detailed view in which you can configure the field. As soon as you change the settings of a field you overwrite the settings defined in the field library. This is indicated by a tag in the list of fields. The settings you are defining here are only applied to the currently selected form template.
7	Delete	Press this button to delete the field from the form template. The field is only deleted from the currently selected form template. It remains in the field library and can be added to the form template again.
8	Highlighted field	If you select a field in the list or in the preview it will be highlighted by a blue background colour in the preview or list.
9	Detail view	The detail view is selected by default. A preview of the form template – which can be used to create an entry – is shown here.

10	Auto event task	If you have selected <i>Auto event task</i> , you will see a preview of the form template for auto events of tasks. Auto events can only be created for form templates of the message type.
11	Auto event instruction	If you have selected <i>Auto event instruction</i> , you will see a preview of the form template for auto events of instructions. Auto events can only be created for form templates of the message type.
12	Position	To change the arrangement of the fields, click and hold the  symbol to drag the field to a new position.
13	Size	You can change the size of a field by selecting the arrow in the corner and dragging it until the field has the desired size.

24.4.2 Field details

In the detailed view of the fields you can overwrite the settings that deviate from the default data in the field library.

Titel OK Cancel

Tenant

Type

System name

1 Use name of business field
 Name

2 Use datasource of business field
 List
 ▼ ✎

3 Use defaults of business field
 Copy value from parent element
 Default list item

4 Use validation rules of business field
 Is mandatory
 Only editable in creation mode
 Is read only field
 Allow multi selection

Figure 24.7: Overwriting field settings

#	Name	Description
1	Use name of business field	If you remove the checkmark you can overwrite the field name for this form template, which is then visible as field name in the selected form template.
2	Use datasource of business field	You can overwrite the data source for the field when you uncheck the checkbox.
3	Use defaults of business field	If you remove the checkmark you can overwrite all default values of the field library.
4	Use validation rules of business field	You can overwrite the validation rules when you uncheck the checkbox.

24.4.3 Settings

In the settings tab you can set parameters for adding and creating entries.

The screenshot shows a settings interface with three tabs: 'Designer', 'Settings' (selected), and 'Attach buttons'. It is divided into two columns: 'Create settings' and 'Update settings'. Each column contains four dropdown menus. Red circles with numbers 1 through 8 are overlaid on the dropdown arrows to indicate specific settings.

- Create settings:**
 - 1: Save mode (Normal)
 - 2: Default signature reason
 - 3: User input mode (No default)
 - 4: Comment Rule (None)
- Update settings:**
 - 5: Save mode (Normal)
 - 6: Default signature reason
 - 7: User input mode (No default)
 - 8: Comment Rule (None)

Figure 24.8: Form creation and updating settings

#	Name	Description
1	Save mode – create entry	Use the drop-down list to set the save mode. The options are <i>Normal</i> , <i>Signature</i> and <i>Signature with reason</i> . <ul style="list-style-type: none"> - If you select <i>Signature</i>, a newly created entry can only be saved by entering the signature. - If you select <i>Signature with reason</i>, a newly created entry can only be saved with the signature and a reason.
2	Default signature reason – create entry	Select which signature reason is selected by default. You can choose between all the signature reasons stored for the logged in tenant. This feature is only available if <i>Signature with reason</i> is selected in 1 .

3	User input mode – create entry	<p>Select the input mode for the user name from the drop-down list. Select from <i>Normal</i>, <i>Proposed</i> and <i>Mandatory</i>.</p> <ul style="list-style-type: none"> - If you select <i>Proposed</i>, the user name of the logged in user is entered in the text field by default. However, the user can change that. - If you select <i>Mandatory</i>, the user name of the logged in user is entered and cannot be changed. <p>This feature is only available if <i>Signature</i> or <i>Signature with reason</i> is selected in 1.</p>
4	Comment rule – create entry	<p>This drop-down list allows you to specify if an additional comment is required to create an entry with this form template. The comment choices are <i>None</i>, <i>Optional</i> and <i>Mandatory</i>.</p> <p>If you select <i>Mandatory</i>, a newly created entry can only be saved with a comment.</p>
5	Save mode – edit entry	<p>Set the save mode. The choices in the drop-down list are <i>Normal</i>, <i>Signature</i> and <i>Signature with reason</i>.</p> <p>If you select <i>Signature</i>, an edited entry can only be saved by entering the signature.</p> <p>If you select <i>Signature with reason</i>, an edited entry can only be saved by entering the signature and a reason.</p>
6	Default signature reason – edit entry	<p>This drop-down list allows you to select which signature reason is selected by default. You can choose between all the signature reasons stored for the logged in tenant.</p> <p>This feature is only available if <i>Signature with reason</i> is selected in 5.</p>
7	User input mode – edit entry	<p>Select the input mode for the user name from the drop-down list. You can choose between <i>Normal</i>, <i>Proposed</i> and <i>Mandatory</i>.</p> <ul style="list-style-type: none"> - If you select <i>Proposed</i>, the user name of the logged in user is entered in the text field by default. - If you select <i>Mandatory</i>, the user name of the logged in user is entered automatically and cannot be changed. <p>This feature is only available if <i>Signature</i> or <i>Signature with reason</i> is selected in 5.</p>
8	Comment rule – edit entry	<p>This drop-down list allows you to specify if an additional comment is required to edit an entry with this form template. The comment choices are <i>None</i>, <i>Optional</i> and <i>Mandatory</i>.</p> <p>If you select <i>Mandatory</i>, an edited entry can only be saved with a comment.</p>

24.4.4 Attach buttons

In the attach buttons tab you can configure which events, instructions or tasks can be attached to entries in the selected form template and where they are saved. You can also specify whether it is only possible to attach events in the list or also when creating an entry.

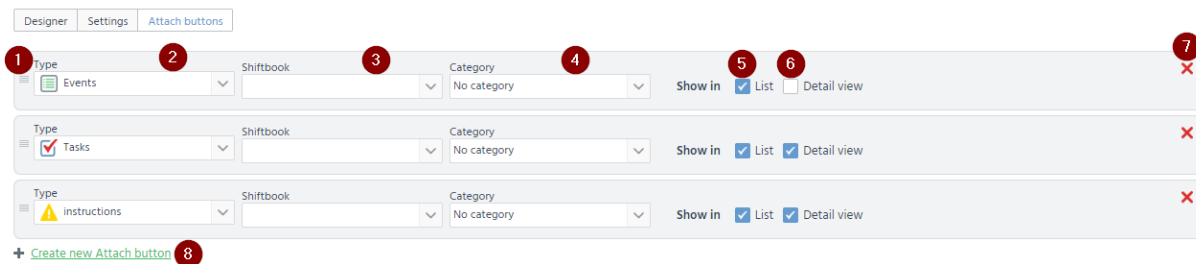



Figure 24.9: Defining attach buttons

#	Name	Description
1	Drag & Drop	In edit mode you can change the order of the attach buttons. Press and hold  to drag the item to the new position, which will be indicated by a blue line between the other items.
2	Type	This drop-down list allows you to select the entry type of the item that will be attached by this attach button. You can choose between <i>Event</i> , <i>Task</i> and <i>Instruction</i> . For example, if you have created an attach button with the event entry type, it is possible to attach an event to the form.
3	Shiftbook	This drop-down list allows you to select the shiftbook in which the attached event is saved. If you press the button, a window opens in which you can select the shiftbook.
4	Category	This drop-down list allows you to select which category is selected for the attached event. You can choose between all the categories stored for this entry type.
5	Show in list	Select if the attach button is displayed in the list view for each entry with the selected form template.
6	Show in list view	Select if the attach button is displayed in the detailed view of each entry with the selected form template.
7	Delete	Click this button to delete an attach button.
8	Create new attach button	Click this button to create a new attach button. A new item appears at the end of the list, which can be configured.

25 Managing categories

25.1 General

In the *manage Categories* menu item, you can create categories and edit existing ones. You can also assign form templates to the categories.

The screen is divided into three sections:

1. Toolbar
2. Category list
3. Detail view

The screenshot shows the 'Categories' management interface in SHIFTCONNECTOR io. The interface is divided into three sections:

1. **Toolbar**: Located at the top, it includes a search bar, a tenant dropdown menu (currently set to 'Chemie'), and buttons for 'Events', 'Tasks', 'Directives', and 'Status'.
2. **Category list**: A table listing existing categories. The table has columns for Name, Tenant, System name, and Form template. A '+ Create new category' button is located above the table.
3. **Detail view**: A 'New Category' form on the right side. It includes fields for Status (Active), Type (Events), Tenant (Chemie), Name, Form template, and Assign to structure item (No assignments).

Name	Tenant	System name	Form template
1486	Chemie		Abweichung
Abweichung	Chemie		Abweichung
> Abweichung	Chemie		Abweichung
Anwesenheit	Chemie		Anwesenheit
Auto-Ereignis	Chemie	autoEventForEvent	Default
Auto-Ereignis für Aufgabe	Chemie	autoEventForTaskCreation	Default
Auto-Ereignis für Aufgabe	Chemie	autoEventForTask	Default
Auto-Ereignis für Weisung	Chemie	autoEventForDirective	Default
Auto-Ereignis für Weisung	Chemie	autoEventForDirectiveCrea...	Default
Batch Steuerung	Chemie		Batch Monitoring
cl	Chemie	IamTheSystemName	Abweichung
Experiment	Chemie		Versuchsreihe
Info	Chemie		Default
Messung	Chemie		Qualität
Messung	Chemie		Measurement data

Figure 25.1: Categories overview

25.2 Toolbar

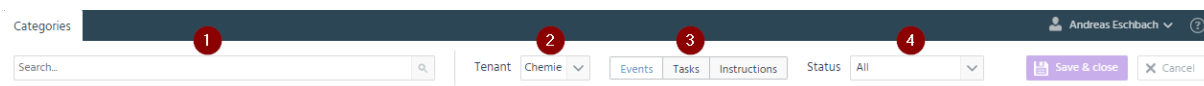


Figure 25.2: Manage categories - toolbar

#	Name	Description
1	Search field	You can search for a specific category in the list. Please refer to section 29 <i>Ad-hoc</i> search for information on how the search field works.
2	Tenant	This drop-down list allows you to filter the categories by tenant. This feature is only available to global administrators.
3	Type	Here you can filter the categories by entry type (event, task or instruction).
4	Status	This drop-down list allows you to filter the categories by status. A category can have the status <i>Active</i> , <i>Inactive</i> or <i>Read only</i> . Multiple choices are possible.

25.3 Category list

Name	Tenant	System name	Form template	Status	Action
Aufgabe erstellt	Shiftconnector	autoEventForTaskCreation	Default	Active (Green checkmark)	+
Aufgabe geändert	Shiftconnector	autoEventForTask	Default	Active (Green checkmark)	+
Disorder	Shiftconnector	Stoerung	Default	Read only (Lock icon)	+
Ereignis geändert	Shiftconnector	autoEventForEvent	Default	Active (Green checkmark)	+
Handover	Shiftconnector	handover	Schichtübergabe	Active (Green checkmark)	+
Info	Shiftconnector	info	Default	Active (Green checkmark)	+
> SHE-Event	Shiftconnector		Default	Active (Green checkmark)	+
Verbesserungsvorschlag	Shiftconnector	EIT_Verbesserungsvorschlag	Default	Active (Green checkmark)	+
Weisung erstellt	Shiftconnector	autoEventForDirectiveCreati...Default	Default	Active (Green checkmark)	+
Weisung geändert	Shiftconnector	autoEventForDirective	Default	Active (Green checkmark)	+

Figure 25.3: Category list

#	Name	Description
1	Create new category	Press the button to create a new category. A new item will appear at the end of the list and a detailed view opens where you can configure the new item.
2	Status	Categories with a green icon have the status <i>Active</i> . Categories with a grey icon have the status <i>Inactive</i> . Categories with a lock icon have the status <i>Read only</i> .

		<p>Please refer to section 30</p> <p><i>Status and</i> their meanings to find out what the different status types mean.</p>
3	Add sub-category	If you press the + icon, a sub-category appears for the selected category.
4	Arrow icon	By clicking on the arrow you can expand or collapse the subordinate items. By default, the list is collapsed and the arrow points to the right > . You can expand the list by clicking. The arrow will then point down ∨ .

25.4 Detailed view of the category

Handover

Status

✔ Active

▼

Type

☰ Events

▼

Tenant

Shiftconnector

Name

Handover

Form template

Schichtübergabe

▼

Fields Settings

- > AssignedShiftbooks
- > Attachments
- > Category
- > Description
- > EventStatus
- > SummaryDescription

Assign to structure item

Infoboard

✕

Figure 25.4: Category settings

#	Name	Description
1	Form template	This drop-down list allows you to specify the form template for the selected category. You can choose between all form templates that are available for the tenant and entry type.
2	Field settings	<p>You can find all fields here that are included in the selected form template for this category. The displayed items vary depending on your form template selection.</p> <p>The settings for the item are collapsed by default and the arrow points to the right ➤. You can expand the settings by clicking on them. The arrow will then point down ▼. You can overwrite the settings of all fields for this category.</p>
3	Assign to structure item	Assign the category to one or more structure items. Press the button to open a list with all structure items of the tenant.

25.5 Overwriting field settings

The screenshot shows a configuration window titled 'Verbesserungsvorschlag' with 'OK' and 'Cancel' buttons. The form contains several fields and options:

- Status:** A dropdown menu set to 'Active' with a green checkmark icon.
- Type:** A dropdown menu set to 'Events' with a list icon.
- Tenant:** A text input field containing 'Shiftconnector'.
- Name:** A text input field containing 'Verbesserungsvorschlag'.
- Form template:** A dropdown menu set to 'EIT_Verbesserungsvorschlag'.
- 1 Use name of form template:** A checked checkbox. Below it is a text input field containing 'Wichtigkeit'.
- 2 Use datasource of form template:** A checked checkbox. Below it is a dropdown menu set to 'EIT_Verbesserungsvorschlag_Prio'.
- 3 Use defaults of form template:** A checked checkbox. Below it are two options: 'Copy value from parent element' (unchecked) and 'Default list item' (a text input field containing 'normal').
- 4 Use validation rules of form template:** A checked checkbox. Below it are two options: 'Is mandatory' (checked) and 'Only editable in creation mode' (unchecked).

Figure 25.5: Overwriting field settings

#	Name	Description
1	Use name of form template	Specify if you want to use the name from the form template for this field. If you remove the checkmark, you can overwrite the field name for this category. The name will then be visible as field name in the selected category.

2	Use datasource of form template	Select if the data source from the form template is used for this field. You can overwrite the data source for the field when you uncheck the checkbox.
3	Use defaults of form template	Select if the default values from the form template should be used for this field. If you remove the checkmark, you can overwrite the default values.
4	Use validation rules of form template	Select if the validation from the form template should be used for this field. You can overwrite the validation rules when you uncheck the checkbox.

26 Category assignment

26.1 General

In the *assign Categories* menu item you can assign categories to the structure item and tabs (*events, tasks, instructions*).

The screen is divided into three sections:

1. Organizational register
2. Category list
3. Detail view

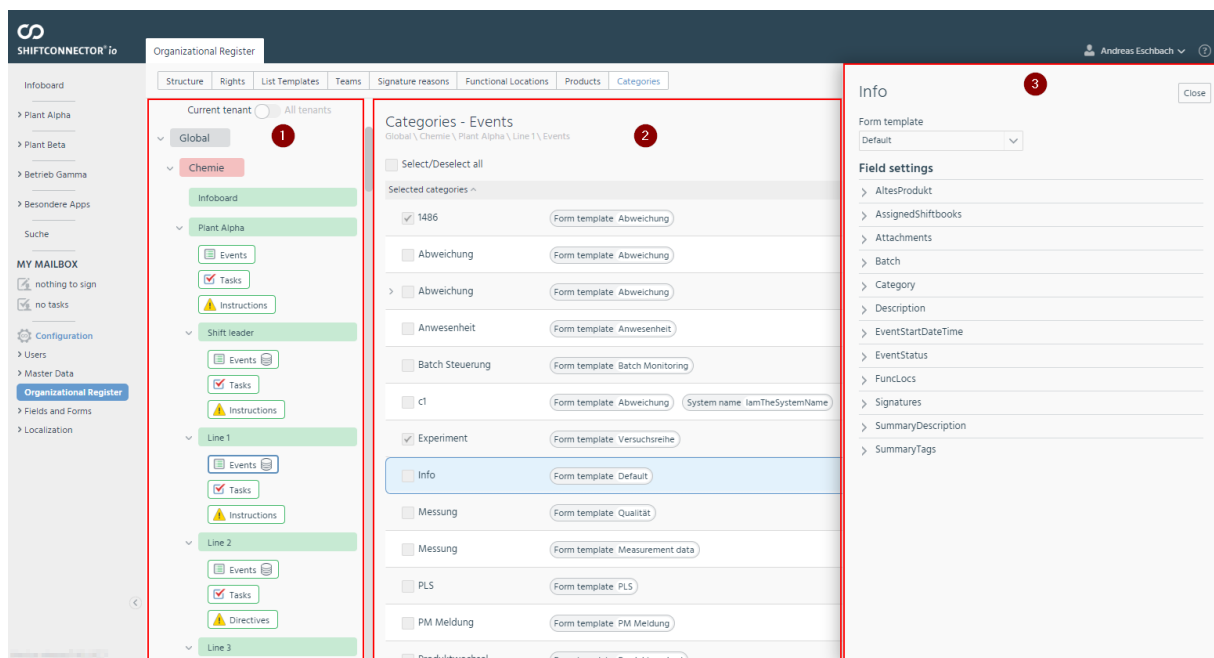


Figure 26.1: Assign categories overview

26.2 Organizational register

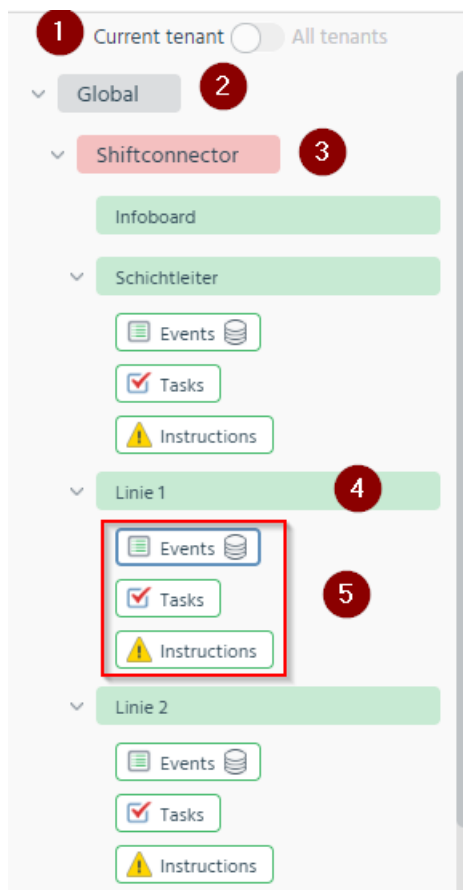


Figure 26.2: Organizational register

#	Name	Description
1	Current tenant / all tenants	The button is set to “Current tenant” by default. Set the button to “All tenants” to show all available tenants.
2	Global	You cannot assign a category to the global item.
3	Tenant	You cannot assign a category to the tenant item.
4	Line 1	If you click on a structure item under a tenant, it is selected and a list of all system categories appears on the right. You can only assign system categories to a structure item.
5	Events, tasks and instructions	Clicking on a tab will select it and the list of all categories created for that type will appear in the centre of the screen.





26.3 Detailed view of category assignment

The screenshot shows a configuration window titled "Improvement suggestions" with "OK" and "Cancel" buttons. The "Form template" is set to "EIT_Verbesserungsvorschlag". Under "Field settings", several fields are listed with expandable/collapsible arrows. The field "EIT_Verbesserungsvorschlag_Prio" is expanded, showing six numbered settings:

- 3** Use name of category
Name: Wichtigkeit
- 4** Use datasource of category.
List: EIT_Verbesserungsvorschlag_Prio
- 5** Use defaults of category
 Copy value from parent element
Default list item: normal
- 6** Use validation rules of category
 Is mandatory
 Only editable in creation mode
 Is read only field
 Allow multi selection

Other fields listed include "AssignedShiftbooks", "Attachments", "Category", "Description", "EIT_Verbesserungsvorschlag_Status", and "EventStartDateTime".

Figure 26.3: Overwriting category settings

#	Name	Description
1	Category name	The name of the category is displayed here.
2	Form template	You can select a different form if necessary.
3	Use name of category	<p>Remove the checkmark if you want to change the name of the field. The new field name only applies to the selected category and form template.</p> <p>If you select a different form template in , the name defined in the form template is automatically displayed for the fields.</p>
4	Use datasource of category	<p>Select if the field should use the same data source as defined in the form template. If you remove the checkmark, you can redefine the field's datasource for the form template. These changes apply only to the selected categories to which the form template has been assigned.</p> <p>If you select a different form template in , the data source defined in the form template is automatically selected for the fields.</p>
5	Use defaults of category	<p>Select if the default values as defined in the form template should be used for the field. If you remove the checkmark you can redefine the field's default values for the category. These changes apply only to the selected category to which the form template has been assigned.</p> <p>If you select a different form template in , the default values defined in the form template are automatically used for the fields.</p>
6	Use validation rules of category	<p>Select if the validation as defined in the form template should be used for the field. If you remove the checkmark, you can redefine the field's validation for the category. These changes apply only to the selected category to which the form template was assigned.</p> <p>If you select a different form template in , the validation defined in the form template is automatically used for the fields.</p>

26.4 Category list

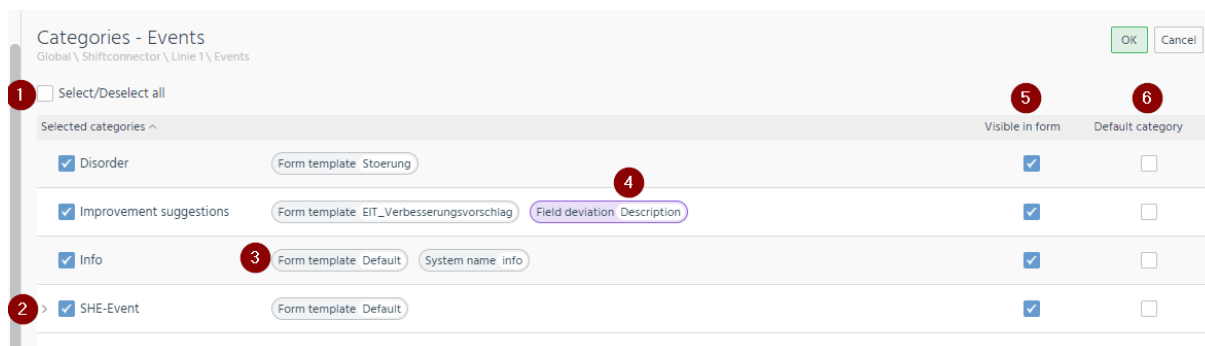


Figure 26.4: Category list

#	Name	Description
1	Select/deselect all	Set the checkmark to select all displayed categories.
2	Arrow icon	By clicking on this icon you can expand or collapse the subordinate items. By default, the list is collapsed and the arrow points to the right >. You can expand the list by clicking. The arrow will then point down v.
3	Form template	This tag shows the form template assigned to the category.
4	Deviations	This tag shows the fields whose settings have been overwritten. The new settings only apply to the selected category. For all other categories that have been assigned the same form template, the settings made in the form template apply.
5	Visible in form	You can make the category visible in the user interface during category selection by checking the box. Removing the checkmark disables the category from being visible in the user interface during category selection, which means that it cannot be selected.
6	Default category	Select a default category and check the associated box. You can only select one default category per tab. If you check the box, you can still change the category when creating an entry.

26.5 System categories

If you select a structure item (here: line 1), the assigned system categories are shown on the right. These system categories are assigned to structure items by default and cannot be removed. It is not possible to assign system categories to tabs.

You can change the settings for the fields of the form or select another form in the detailed view of a system category.

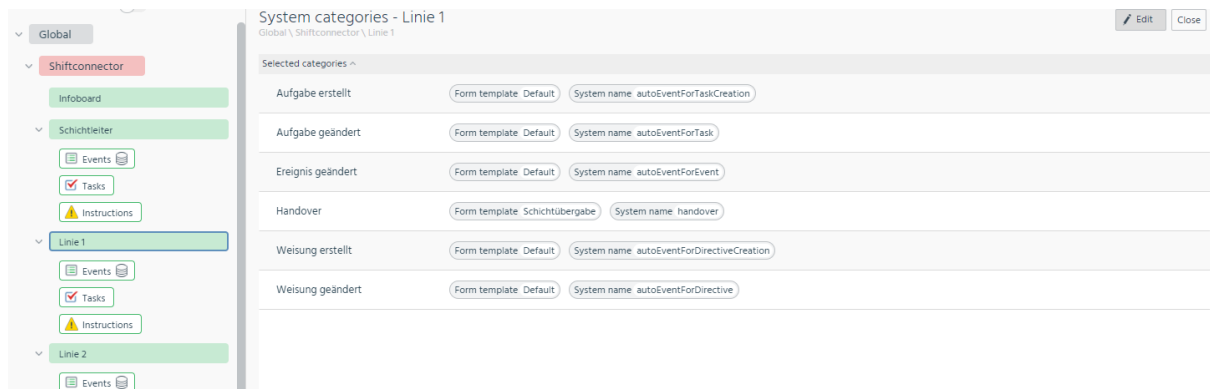


Figure 26.5: System category list

27 Managing Datasources

27.1 General

In the *manage Datasources* menu item you can manage the drop-down lists for the *Tree Select* and *Combobox* fields. You can create various selection lists and define their content.

The screen is divided into four sections:

1. Toolbar
2. Datasource list
3. Detail view

The screenshot shows the 'Datasources' management interface. On the left is a sidebar with navigation options like 'Infoboard', 'Plant Alpha', 'Plant Beta', 'Betrieb Gamma', 'Besondere Apps', 'Suche', 'MY MAILBOX', 'Configuration', 'Users', 'Master Data', 'Functional Locations', 'Products', 'Text Modules', 'Datasources', 'Organizational Register', 'Fields and Forms', and 'Localization'. The main area is titled 'Datasources' and shows a list of datasources for the 'Chemie' tenant. The list includes items like 'SAP Systemstatus', 'SAP Verantwortlicher Arbeitsplatz', 'Schadensbild', 'Schicht', 'Schicht 1', 'Schicht 2', 'Schicht 3', 'Schicht 4', 'Schicht 5', 'Sicherheitskoordinator', 'Status Reaktor2', 'Status_Destillationskolonne', 'Status_Reaktor', 'Status_Tank', 'Titel_Continuous_Improvement', 'Überbrückung Methode', 'Überbrückung Sicherheitslevel', 'Ursache', 'UrsachenOEE', and 'Zustaendig fuer Massnahme'. Each item has a delete icon (X) and a refresh icon (circular arrow). Below the list is a '+ Create new list' button. The right side of the interface shows a detail view for the selected 'Titel_Continuous_Improvement' datasource. It includes a name field, an 'Edit' button, and a table with columns: Label, Icon, Status, Value 1, Value 2, Value 3, Value 4, and Value 5. The table contains three rows: 'Vorlage 1', 'Vorlage 2', and 'Vorlage 3', each with a status of 'Active' and a green checkmark icon. At the bottom of the detail view is an '+ Add option' button.

Figure 27.1: Datasource overview

27.2 Toolbar

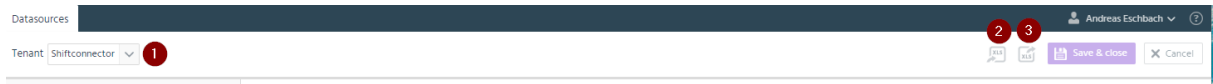


Figure 27.2: Manage datasources - toolbar

#	Name	Description
1	Tenant	This drop-down list filters the lists by tenant. This feature is only available to global administrators.
2	XLS-Import	The Excel export button allows you to add a selection list with all items in a single step. Download a preformatted Excel file to Shiftconnector®. Please refer to section 27.3 Create datasource through Excel import for information on how to import Excel files.
3	XLS-Export	The Excel export button allows you to download an existing selection list as an Excel file to your computer.

27.3 Create datasource through Excel import

After you have clicked on the button for the XLS import, the import window opens. Please note that the Excel file must correspond to the specified template. You can download the template in the window. You can also change the settings for the import.

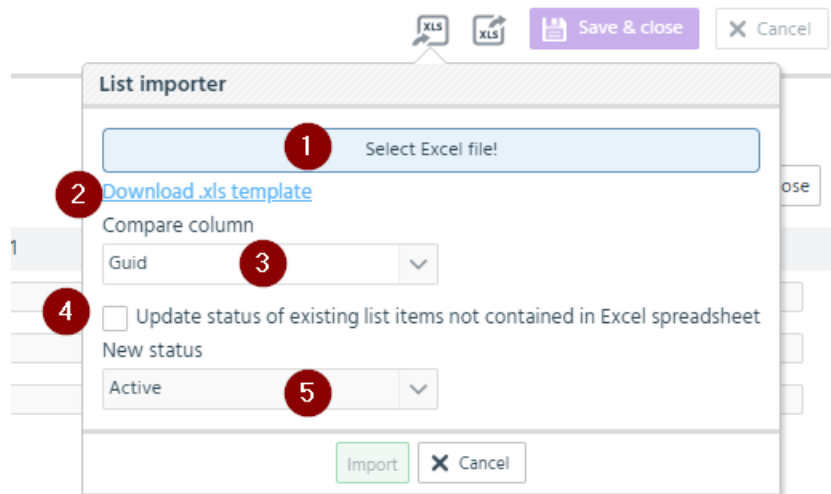


Figure 27.3: Excel import of data sources

#	Name	Description
1	Select Excel file	Press the button and select the Excel file you wish to import.
2	xls. Download template	Click on the hyperlink to download the Excel template.
3	Compare column	This drop-down list allows you to select the column according to which the items that already exist in Shiftconnector® are compared with the new items from the Excel file. The comparison is used to identify which items have already been imported and need to be updated if necessary.
4	Update status of existing list items that are not in the Excel file	Check the box to change the status of existing items that do not exist in the Excel file.
5	New status	This drop-down list allows you to select the status of the items already in Shiftconnector® after importing.

27.4 Data source lists

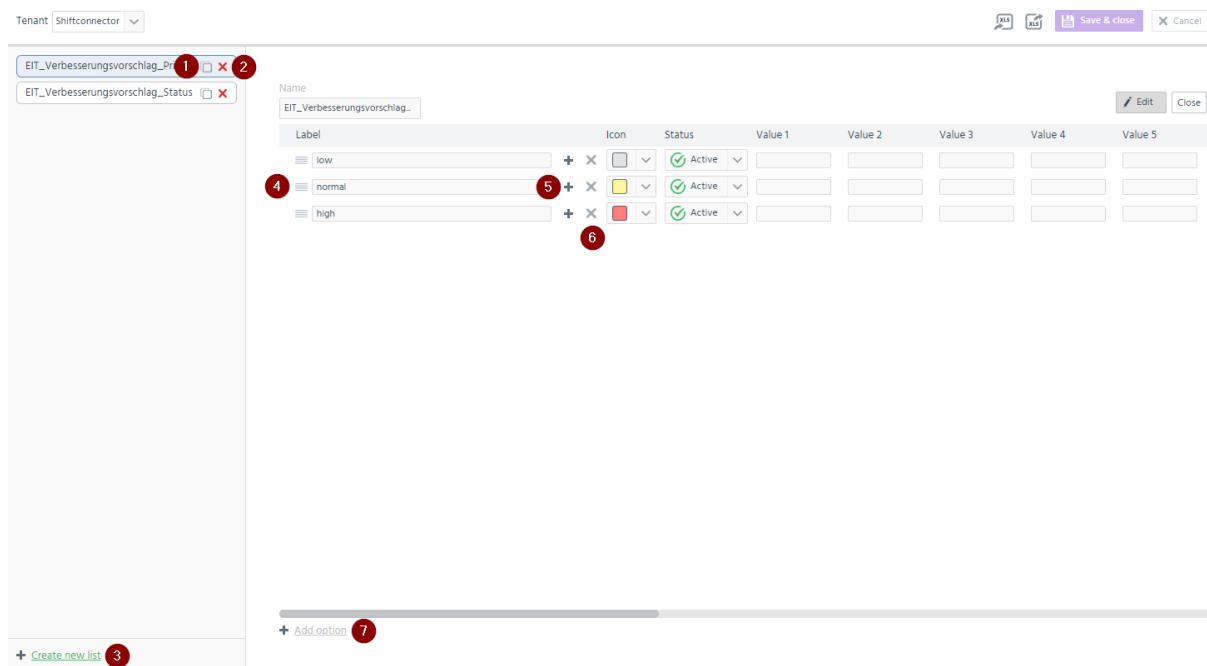




Figure 27.4: Data source lists

#	Name	Description
1	Copy	Click this button to copy a selection list. A copy has the same configuration as the original item. The name of the duplicate is the name of the original item plus the suffix "Copy of". This is shown at the end of the list.
2	Delete	Click this button to delete a selection list. You can only delete a selection list if it is not used in any field.
3	Create new list	Click this button to create a new selection list. This is shown at the end of the list.
4	Drag & Drop	You can move the items in the selected selection list in edit mode. Press and hold  to drag the item to the new position, which will be indicated by a blue line. This lets you specify the hierarchy and sort order.
5	Add subordinate item	Click this button  to add a subordinate item to the item. The items can be freely nested.
6	Delete item	Click this button to delete an item from the selection list. You can only delete an item from the selection list if it is not used in any field.
7	Add option	Click this button to add a new option. This is shown at the end of the list.

28 Default behaviour

Shiftconnector® contains fields marked in red. This red highlighting indicates that the field must be filled in to complete the process. You cannot complete the process if the fields marked in red are not filled in.

29 Ad-hoc search

Many of the menu items in the administration have a search field in the toolbar that allows you to use a free text search when searching for a specific item, e.g. a user. This section describes how this search works.



Figure 29.1: Ad-hoc search

#	Name	Description
1	Search field	When you enter the first letter in the search field, the list is filtered according to the letter. The more letters you enter in the search field, the more accurate the search becomes.
2	Search list	The list is filtered in real time according the text entered. The example above shows all teams that have the word "Shift" in their name.

30 Status and their meanings

There are four statuses in the administration: *Active*, *Read only*, *Inactive* and *Blocked*. The *Blocked* status is only available for the manage user menu item. Find out more about the status types here.

Name	Description
Active	Normal active status. The item can be used and found in all menu items without any restrictions.
Read only	The item with the <i>Read only</i> status is no longer available when creating new entries or editing existing entries. Depending on the type of item, it may still appear in the search results.
Inactive	The item with the <i>Inactive</i> status is neither available for new entries nor in the search.
Blocked	The user is blocked and is no longer allowed to log in.