eschbach

SHIFTCONNECTOR® io

User Manual

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All the information in this document is based on current knowledge and understanding and is hence subject to change without notice. This document supersedes any previously released revisions.

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1 Preface

1.1 About this manual

This manual contains everything that is relevant to know for the daily use of Shiftconnector® io by end users. If you require background information or any further explanation, please contact your system administrator.

The manual has to be seen as a reference for people who attended the Shiftconnector® io training. If you are a new user we advise that you get your training from an experienced Shiftconnector® io user, preferably working in the same department as yourself.

1.2 The application

Shiftconnector® io by eschbach GmbH was first developed in 2005 and has been constantly improved since. It can be used in all operations which produce in shifts as the entire shift handover process and much more is supported by the application. It is used for improved coordination and seamless communication in and between shifts.

Relevant events in production are recorded in the Shiftbook so that they are permanently documented. Also, tasks and Instructions with a status indicating their current situation can be allocated to the respective work centers. They are always interlinked to events.

An info board is available where company-wide or workplace-related information can be placed.

1.3 Support

For support regarding Shiftconnector® io please contact your key user. He can help you regarding training material, configuration, and problem solving or change requests. If necessary he can contact other technical or functional experts to help solve your request.

2 User interface

2.1 System Requirements

- Browsers: IE 11 or later, Google Chrome 55 or later (for file upload/linking feature only Internet Explorer is supported)
- JavaScript and Cookies activated
- Minimum screen resolution of 1280x720

2.2 Layout

The layout of Shiftconnector is divided into six main parts:

1. Header bar with link to user settings and logout button as well as links to manuals
2. Menu bar, reflecting the organizational structure plus, if applicable, a link to signature list and configuration area
3. Data tabs (e.g. events, tasks and instructions)
4. List template selection, filter and grouping settings. Actions buttons for printing as well as for adding new entries.
5. List area
6. Detail view area

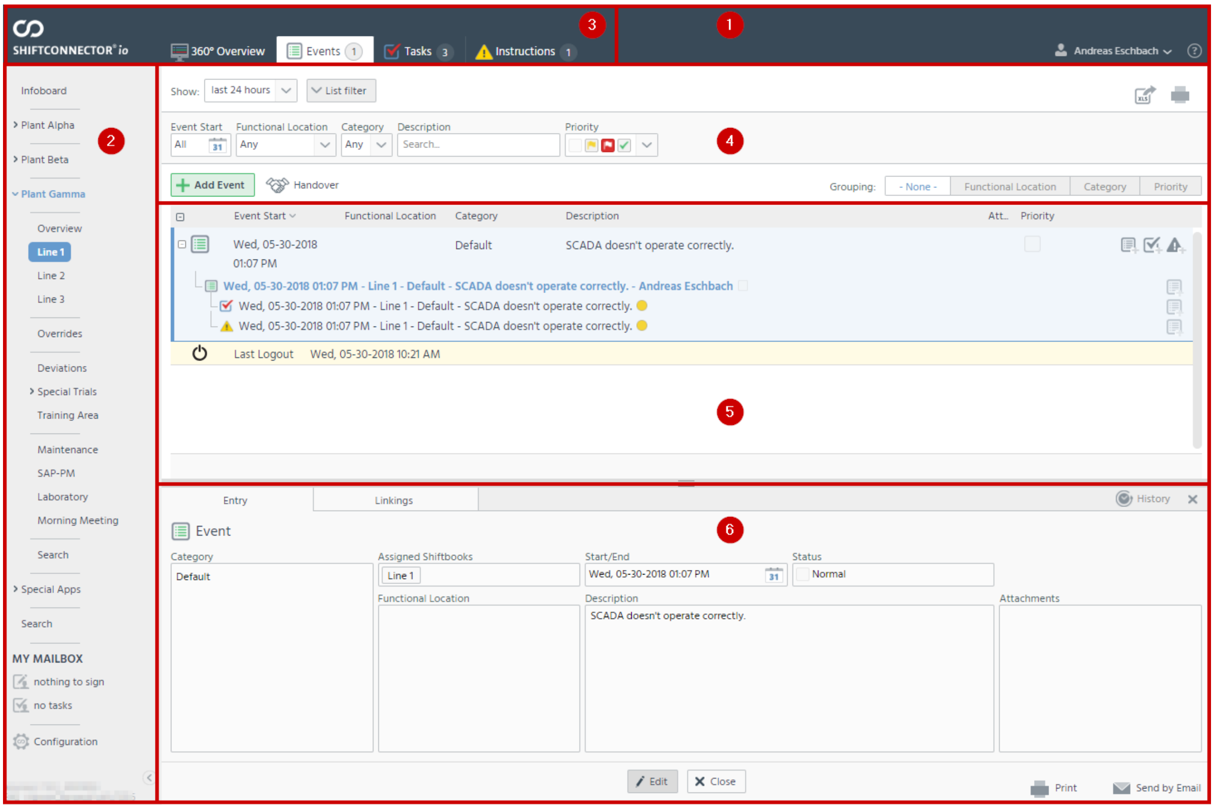


Figure 2.2-1: Shiftconnector® io Layout.

3 The application's main concepts

Shiftconnector® io presents lists of data to you, e.g. events, tasks and instructions in a pre-configured way called *list template*.

Each of these entries in a list is entered, displayed and/or updated by you or one of your colleagues via its relevant form which is also pre-configured and is called a *form template*.

Each of these records is allocated to a category which should make it easy for you to see what the entry is concerned with, and also give you a handle to filter and group by.

Creating these templates and categories is part of the administration process. If you want or need to know more about how to do this, please refer to the Administrator Manual.

The following paragraphs are for gaining a high-level understanding of the main application principles only.

3.1 Form templates – Detail view

The forms are where you log and view the details of what is happening in your shift, i.e. events, tasks and instructions. They are pre-defined and tailored to the needs of the very entry you want to make or view.

The form when displayed is called a *detail view or detail record.*

3.2 List templates – List view

List templates are a pre-defined filter and way of displaying a number of *detail records* (see above) in your workplace for you to choose from. Here are a few typical ones:

- *Show me all events from the last 8 hours, without auto-events, sorted by event date*
- *Show me all events of the last 14 days, with status "Important"*
- *Show me all events up to the last handover*
- *Show me all open tasks, sorted by due date*
- *Show me all overdue tasks, sorted by due date*
- *Show me all delegated open tasks, sorted by due date*
- *Show me all open instructions, sorted by valid from date*
- *Show me all events of category Maintenance*

They are displayed as shown in section 4 Chapter *2.2 Layout* .The displayed data is called a *list view, generic report or generic list*

3.3 Categories

When creating an entry, a category must be either chosen for the entry from a list or a fixed category, which might not be visible to you, might be allocated automatically.

Categories are used to group similar entries in a logical fashion, so you can see quickly what an entry is concerned with on a high level. As similar concerns usually need to record the same data, a form template is configured to be used by this category. Whereas a category can only be allocated one form, this form can be re-used on a number of categories.

4 Authentication and authorization

4.1 Authentication

Before you can work with Shiftconnector® io the administrator has to provide you with access to the application. At this point it will be defined if you will be login in via your Windows account login or via Shiftconnector® io's forms authentication. Your administrator will provide you with the relevant login information.

4.2 Starting the application

With your login information you will have been given a URL link to Shiftconnector® io. Open this in your chosen browser. If you have to login manually, enter your username and password now:

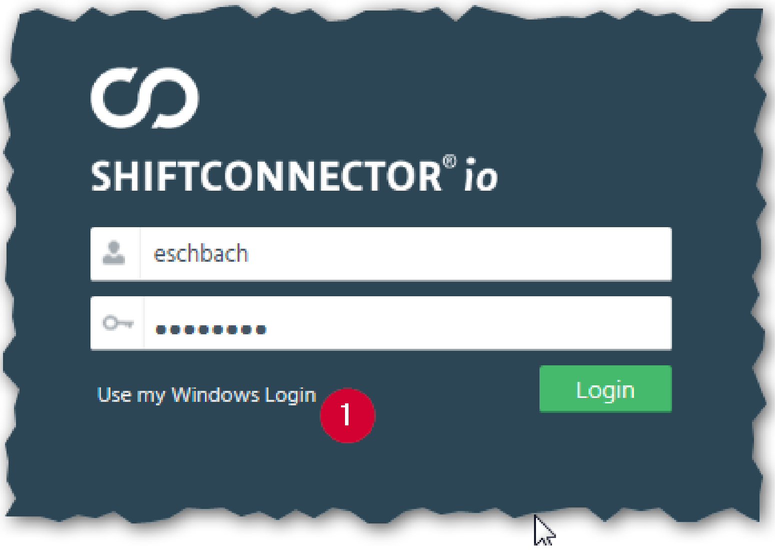


Figure 4.2-1: Login.

With Windows login, you will be either forwarded to the welcome screen directly or you have to click on the relevant link 1. If a login is not possible, please contact your administrator.

If you are using form-based authentication, note that if your account gets locked if you entered the password wrongly for several times. You will initially receive this message:

Figure 4.2-2: Invalid user name or password.

It is pre-configured by your administrator how many times you can repeat the login. If you need to have your account unlocked, contact your key user or administrator.

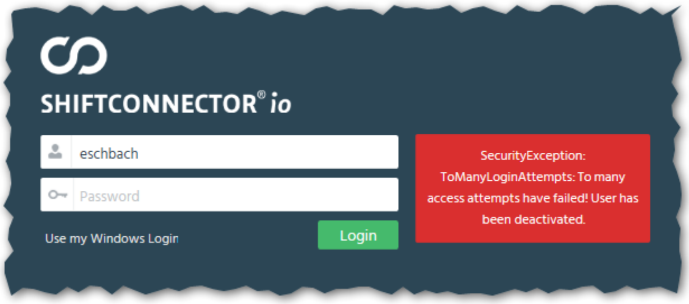


Figure 4.2-3: Locked account.

4.3 Welcome screen

After successful login the Welcome Screen will appear:

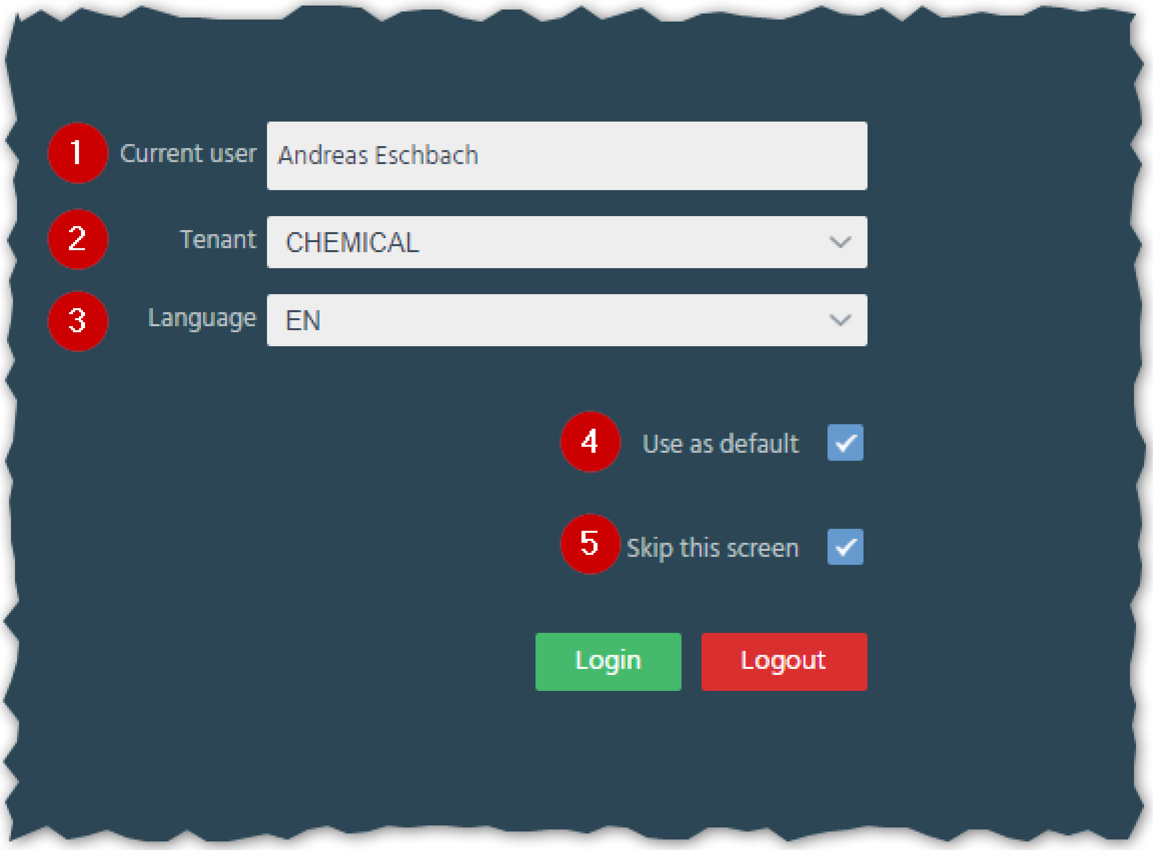


Figure 4.3-1: Welcome screen.

#	Name	Description
1	Current User	Your first and last name is displayed.
2	Mandator (aka *Tenant*)	The mandator (or *tenant* as it is known in some companies) is selectable here if there is more than one, else the sole one is pre-selected.
3	Language	Select the language. It contains all activated languages within the application.
4	Use as default	If you are a member of more than one user group, you can select with which you would like to login, else the sole one is pre-selected.
5	Skip this screen	If the user selects this check box this screen will be skipped for next login and the current selection will be used i.e. the *Use as Default* checkbox will be ticked automatically. To reset this setting, choose

		Change Role / Mandator from the main screen as described in *4.5 User settings and logout*.

Click *Login* to start the application. You will be forwarded to the main page, where you might be asked to change your password if you are login in with forms authentication for the first time.

Click *Logout* to cancel the operation.

The user's session is deleted by the server automatically after a specified inactivity time. Should this happen you will be asked to login again.

4.4 Authorization

The user group that you belong to determines to which activities you are authorized. If you think you ought to belong to another or an additional group, you should contact your key user or administrator.

4.5 User settings and logout

To change various user settings, click on your name in the top right hand-side corner of the screen 1 to open the user setting popup:

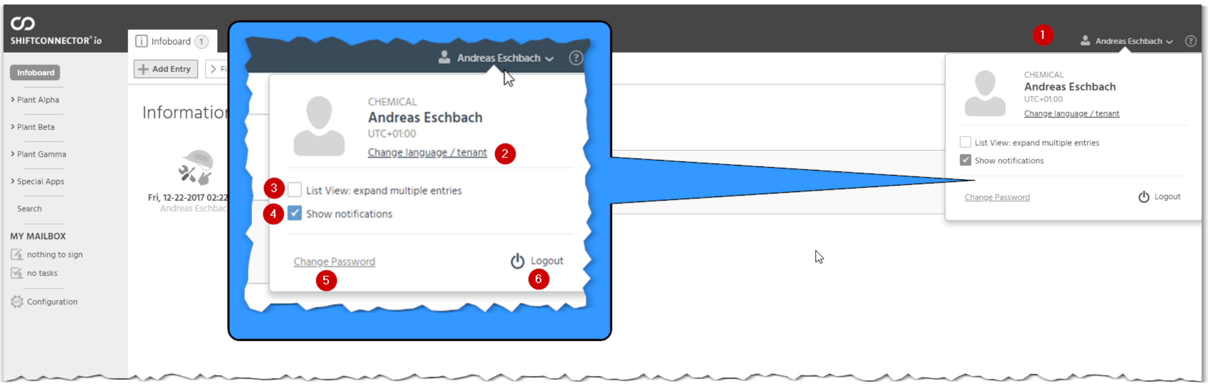


Figure 4.5-1: User settings and Logout.

#	Name	Description
1	User	Click on this link to open the popup window.
2	Link role or tenant change	If you click on this next link, you will be routed back to the Welcome screen, where you can change role or tenant.
3	List view	Here you can switch on or off the functionality described in *6.8 Interlinked records.*

4	Show notifications	Here you can switch on or off the functionality described in *6.2 Notifications.*
5	Change password	If you click on this next link, you will be routed to a dialog window where you can change your password.
6	Logout	Click on this if you want to logoff.

5 Main functionality of Shiftconnector® io

5.1 Events

It is dependent on how your administrator has configured your workplace and your forms and which data is required for you to enter. **So the following screenshots are to be viewed as an example only.**

5.1.1 Creating an event

At the workplace where you want to add an event, choose the *Events* tab:

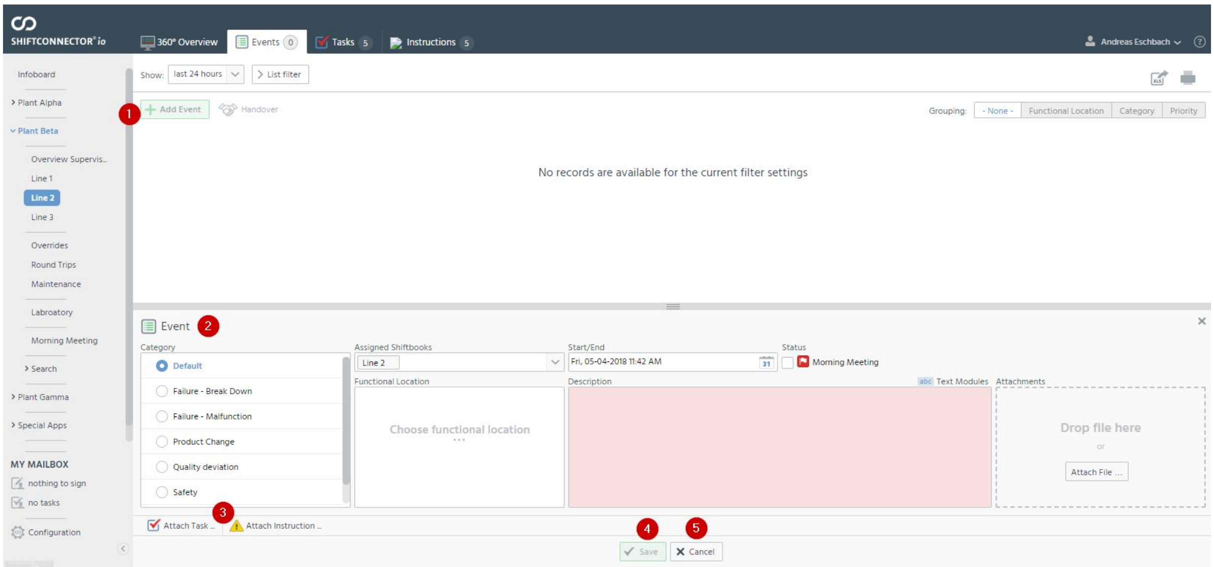


Figure 5.1.1-1: Create event.

#	Name	Description
1	Add Event button	From the top of the screen, click this button to open the entry form.
2	Event entry form	As mentioned before, this is an example form.
3	Attach task / instruction	If these two buttons have been configured to be present, you will be able to add tasks and instructions to the event directly on its creation as described *in 5.2.1 Creating a task* and *5.3.1 Creating an instruction.*
4	Save	Save your entry.
5	Cancel	Discard your entry.

After entering all the required data and saving, the event will be added to the list you are viewing, if the filter criteria fit the new record (e.g. if you have filtered on a status your new record does not have, it won't be shown after save!).

If you choose to discard the entry, click Cancel and, after confirming the action, no data will be saved.

If you need more information on the shown fields Functional Locations, Attachments, Text modules and the like you might want to check out Chapter 6: *Special Components and Functions.*

5.1.2 Updating an event

On the workplace where you want to update an event, choose the *Events* tab and click on the *Add Event* button:

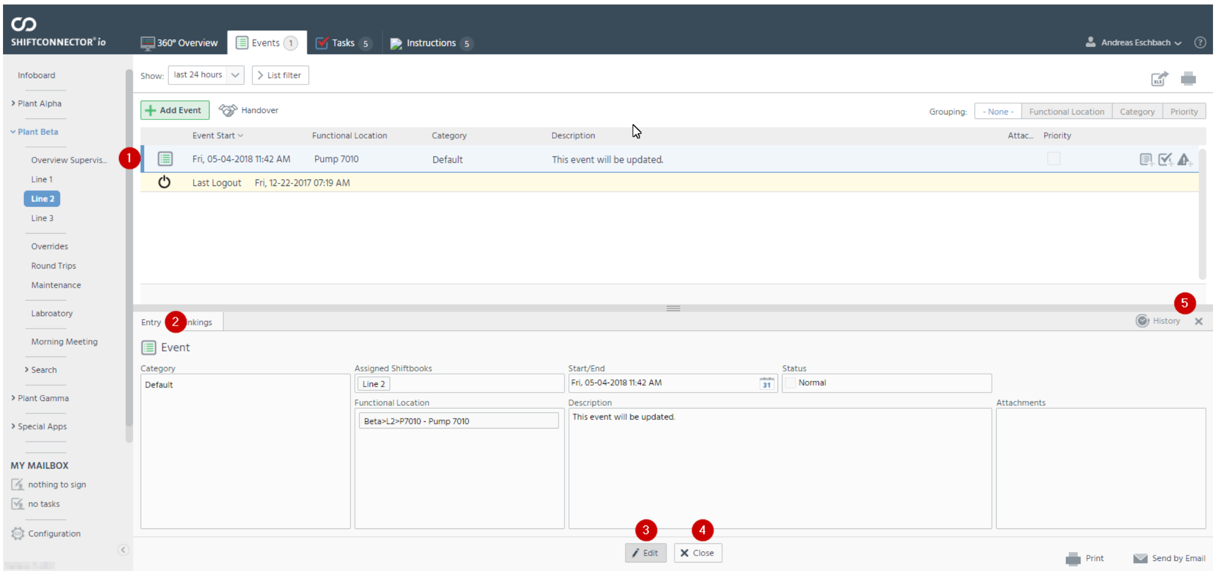


Figure 5.1.2-1: Update event.

#	Name	Description
1	Select record	To update an event, select the record in the list by clicking on it.
2	Entry detail view	The details are shown to you in read mode.
3	Edit	Click this button to switch into edit mode.
4	Close	If you do not want to put the record into update mode but close the detail view, click this button.
5	X	Click on the X to close the detail view.

You only see the *Edit* button if you have authority to update events. Speak to your administrator if you feel the authority is not set correctly.

Once you have clicked the *Edit* button, you can proceed updating the entry.

Take into consideration if the entry has already been signed by someone. A change will render those signatures invalid and send a request again to each required user.

5.1.3 Adding a task to an event

Please refer to sections *5.2.1.2 Scenario: Creating a task* and *0*

Scenario: . Scenario: Creating a task

5.1.4 Adding an instruction to an event

Please refer to sections *0*

Scenario: Creating an instruction at its event creation and *5.3.1.3*

Scenario: Creating an instruction and attaching it to an existing event

5.1.5 Creating a handover

The system can provide a function to report a handover between two shift supervisors with an electronic signature. The author of this handover event is the supervisor going out and currently logged-in, whereas the shift supervisor taking over is signing.

The handover can be initiated from the event tab of the work place:

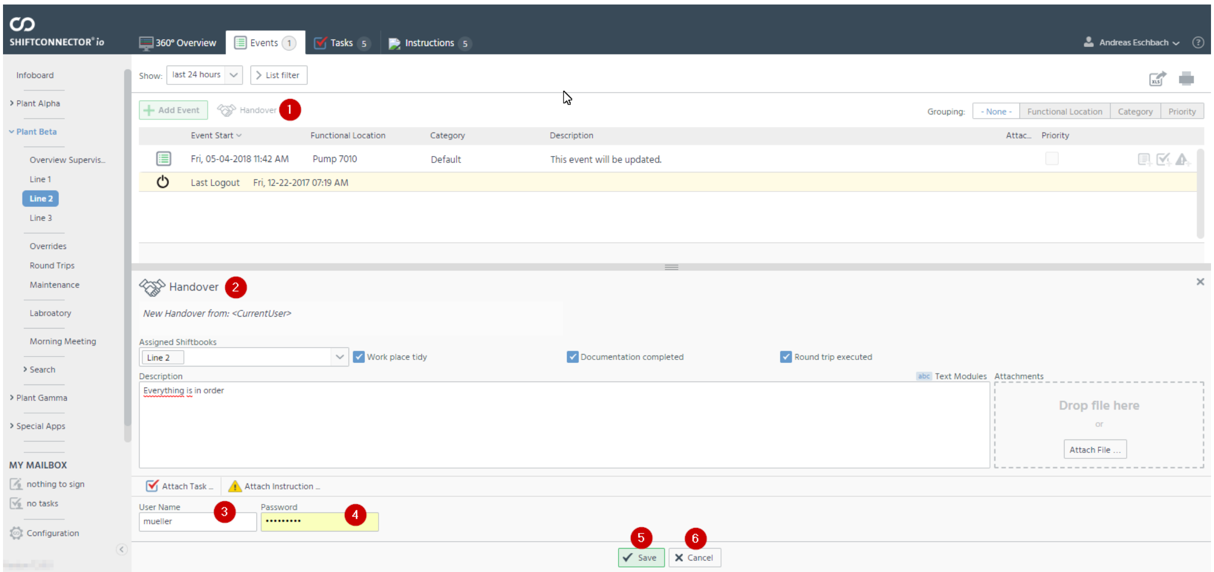


Figure 5.1.5-1: Create handover.

#	Name	Description
1	Handover button	If you click this button the handover detail view form will be opened as configured by your administrator.
2	Handover form	The form will be opened directly in edit mode.
3	User name	This is where the shift supervisor taking over enters his user name.
4	Password	This is where the shift supervisor taking over enters his password.
5	Save	Save the handover. The screen will close after this action.
6	Cancel	This will discard the handover action, after a confirmation dialog.

Once the shift leader taking over has signed and the record is saved, it appears in the list:

After handover has been signed

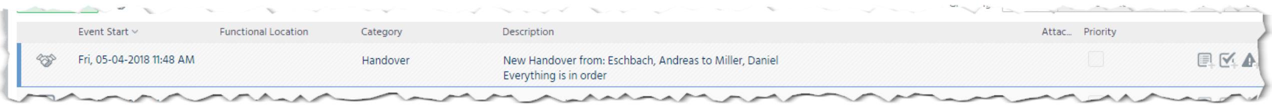


Figure 5.1.5-2: Handover entry in Listview.

5.1.6 Updating a handover

Initiate an update the same as a normal event. Another signature is necessary if the update is to be saved.

5.1.7 Deleting an event / handover

You cannot delete an existing event. For events other than a handover it is possible however to set a priority to *Deleted*, which will filter it out of most list templates. If it is shown, the data is struck through so you can easily pick it out:

Figure 5.1.7-1: "Deleted" event.

5.2 Tasks

It is dependent on how your administrator has configured your workplace and your forms and which data is required for you to enter. **So the following screenshots are to be viewed as an example only.**

5.2.1 Creating a task

There are three ways how you can create a new task. The difference lies in how you initiate the creation. However, the result will always be the same: The created task will be a child entry of an event (except in one case, which will be described separately).

5.2.1.1 Scenario: Creating a task before the event

On the workplace where you want to add a task, choose the *Tasks* tab:

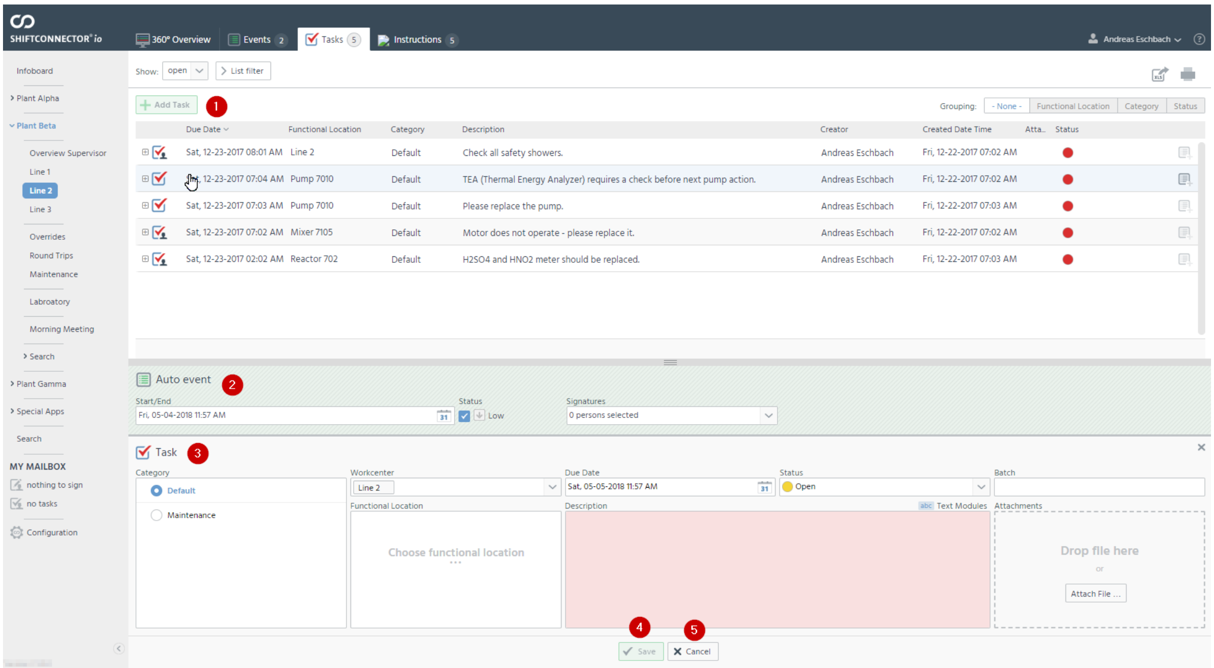


Figure 5.2.1.1-1: Create task before the event.

#	Name	Description
1	Add Task	From your list, click this button to open the entry form.
2	Auto-event area	Here any configured auto-event fields will be shown.
3	Task entry	The entry form as configured by your administrator. As mentioned before, this is an example form.
4	Save	Save your entry. The button is disabled until you have entered all the mandatory fields correctly (red fields).
5	Cancel	Discard your entry.

Every time that you create a task this way, a “parent” event (also known as *auto-event*) is created automatically in the same Shiftbook.

You don’t have to enter anything for it, in fact, configuration might be such that you *can’t* enter anything.

But if it is, you find the entry zone for this above the new task as you see above at 2. You have to click the panel to expand it.

After adding the mandatory fields for the task and saving, you cannot only see the new task on the task tab

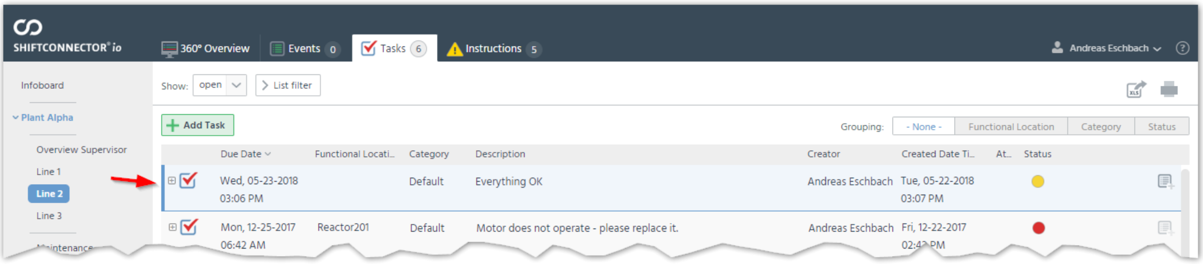


Figure 5.2.1.1-2: Task in task list.

but also below its auto-event on the event tab :

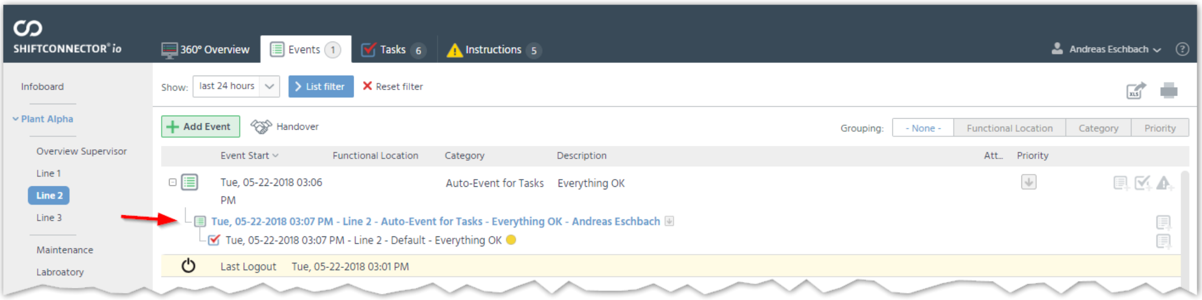


Figure 5.2.1.1-3: Auto-event in event list.

5.2.1.2 Scenario: Creating a task at the same time as the event

In this scenario you will start with creating the event first. So, note that the following screenshot shows the *Events* tab:

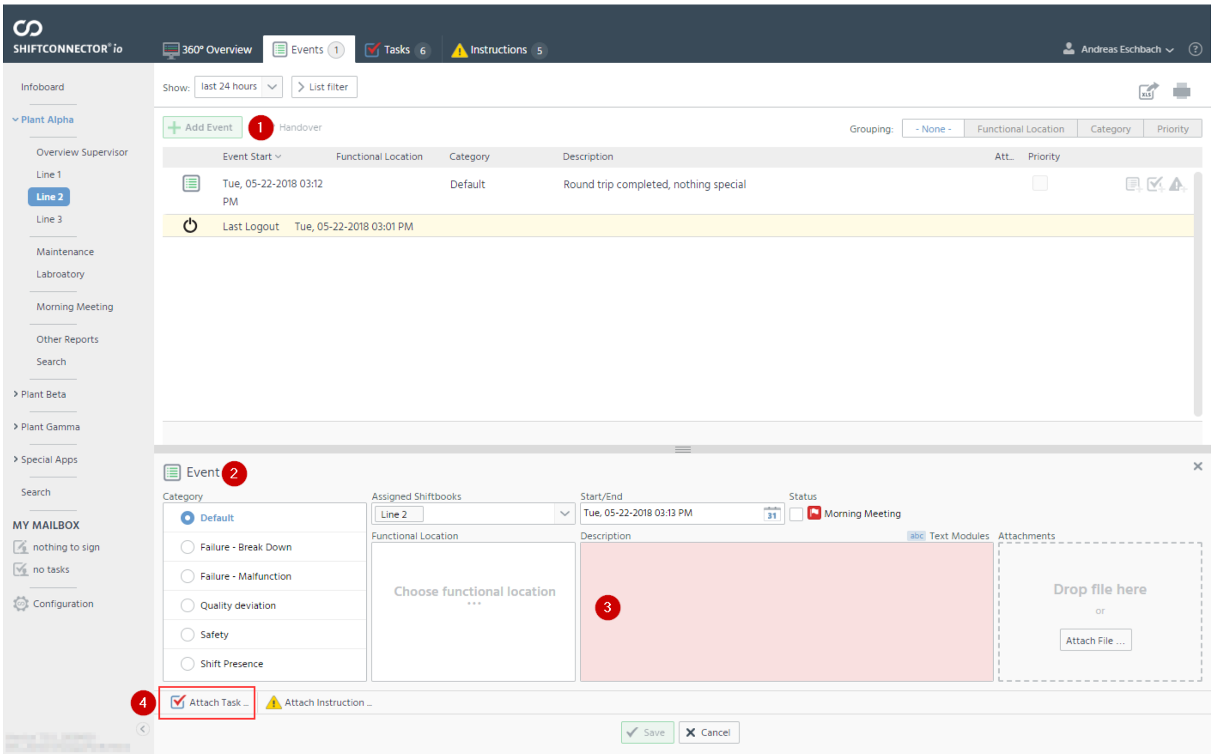


Figure 5.2.1.2-1: Create event with the task.

#	Name	Description
1	Add Event	Clicking this button will open the configured entry form for the event.
2	Event entry form	Event entry form (“Detailview”).
3	Mandatory data	Here you enter the necessary data for your event. These fields might be configured by default or through your administrator, to be copied into any child entry being made, if the fields are present on the child (this functionality is often referred to confusingly as *parent copy*).
4	Attach task	Click this button to open the task entry form.

Now, if you click the button at 4 a task entry form opens additionally:

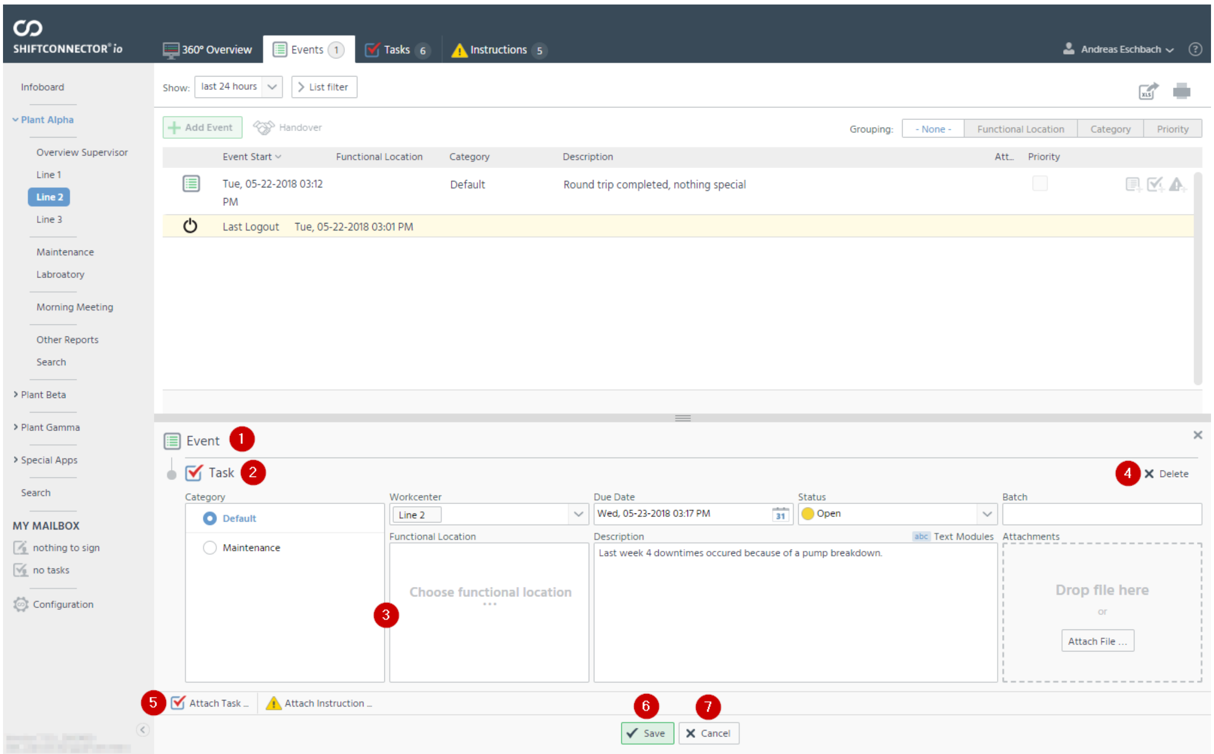


Figure 5.2.1.2-2: Create task with the event.

#	Name	Description
1	Event	The earlier started event gets shifted to the background, to display the task form to be linked to it in the foreground of the screen.
2	Task entry form	Detailview of the task entry form.
3	"*Parent copy*" data	The entries made for functional location and description have been copied over from the event through "*Parent copy*" configuration. This is configured this way by your administrator and might not behave exactly this way if it has been done differently.
4	Delete	If you have opened up a task entry form by mistake, you can remove it again with this button. This is only possible before the first save.
5	Attach task	Note that you could add yet another task to the event, or even many more.
6	Save	Now when clicking Save, both the event and its attached task get saved.
7	Cancel	This will discard both entries.

Before saving you can still edit data for the task as well as for the event. You just click on the link *Event* at 1.

Once you click save, all entries will be saved together and displayed in the list on the event tab

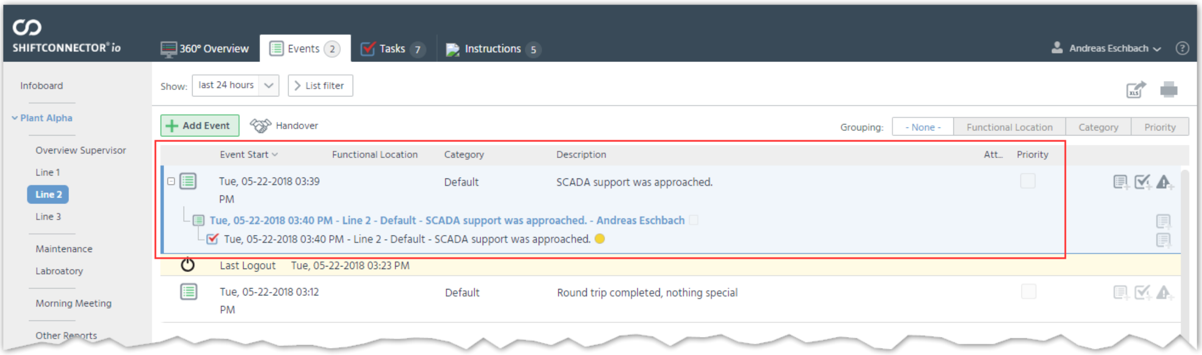


Figure 5.2.1.2-3: Event tab after save.

as well as on the task tab:

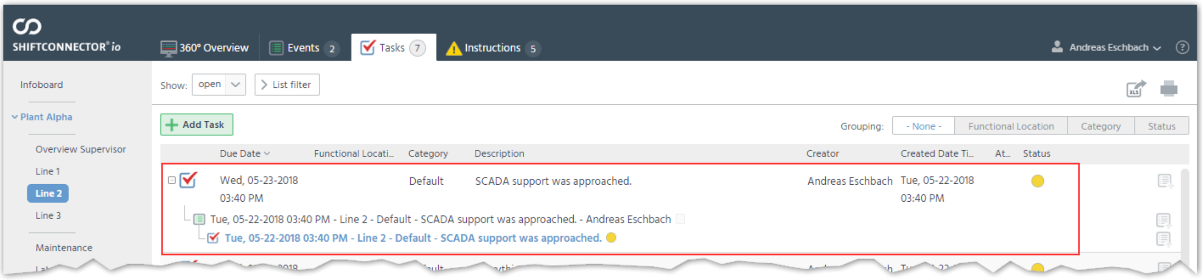


Figure 5.2.1.2-4: Task tab after save.

5.2.1.3 Scenario: Creating a task and attaching it to an existing event

Sometimes it might be only possible to attach a task later to an event previously created by you or someone else. This is how you proceed in such a case:

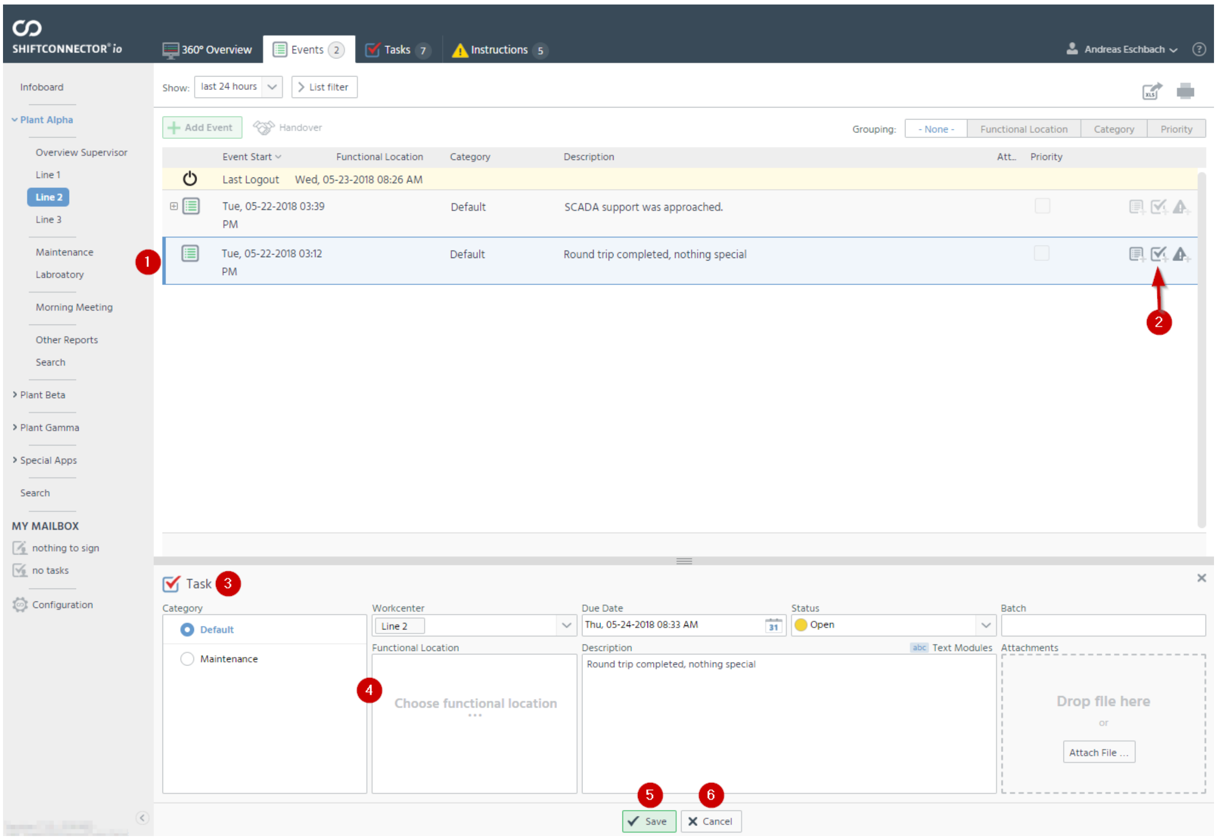


Figure 5.2.1.3-1: Attach a task to an existing event.

#	Name	Description
1	Event	The event you want to attach a task to.
2	Attach task button	Click this button to open the entry form for the task as configured by your administrator.
3	Task entry form	This form will open in edit mode for you.
4	"*Parent copy*" data	These fields have been copied from the event as described earlier.
5	Save button	Saving this will link the new task under the existing event. See below screenshot.
6	Cancel	This will discard all the changes but not change the existing event in any way.

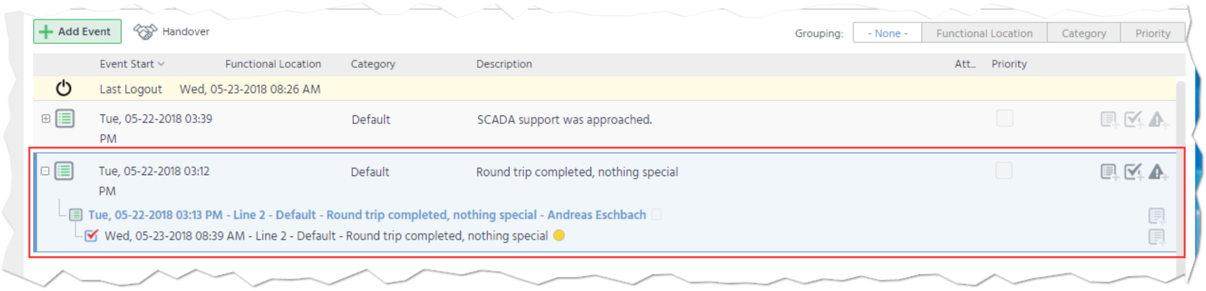


Figure 5.2.1.3-2: The attached task below the event in the list.

5.2.2 Updating a task

Updating a task is as simple and is initiated exactly the same way as updating an event, refer therefore to section *5.1.2 Updating an event.*

5.2.3 Deleting a task

You cannot delete an existing task. It is possible however to set a status *Deleted*, which will filter it out of most list templates. If it is shown, the data is struck through so you can easily pick it out:

Figure 5.2.3-1: "Deleted" task.

5.2.4 Task status

The status of a task is one of its most important properties, telling you exactly where it is at. Some of the status you can set yourself, some will be set automatically by the system. See the following diagram:

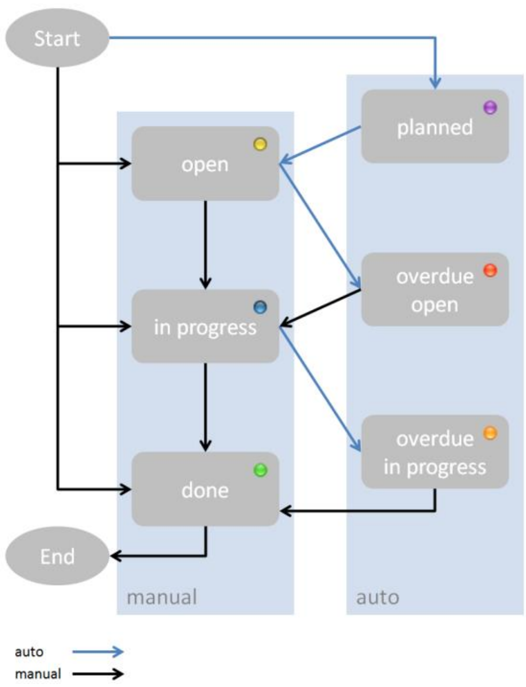


Figure 5.2.4-1: Task Status cycle with color indication.

5.2.5 Task recurrence types and options

A task can be defined to have to be executed just once or multiple times. If it is to be scheduled recurrent, there are a multitude of options:

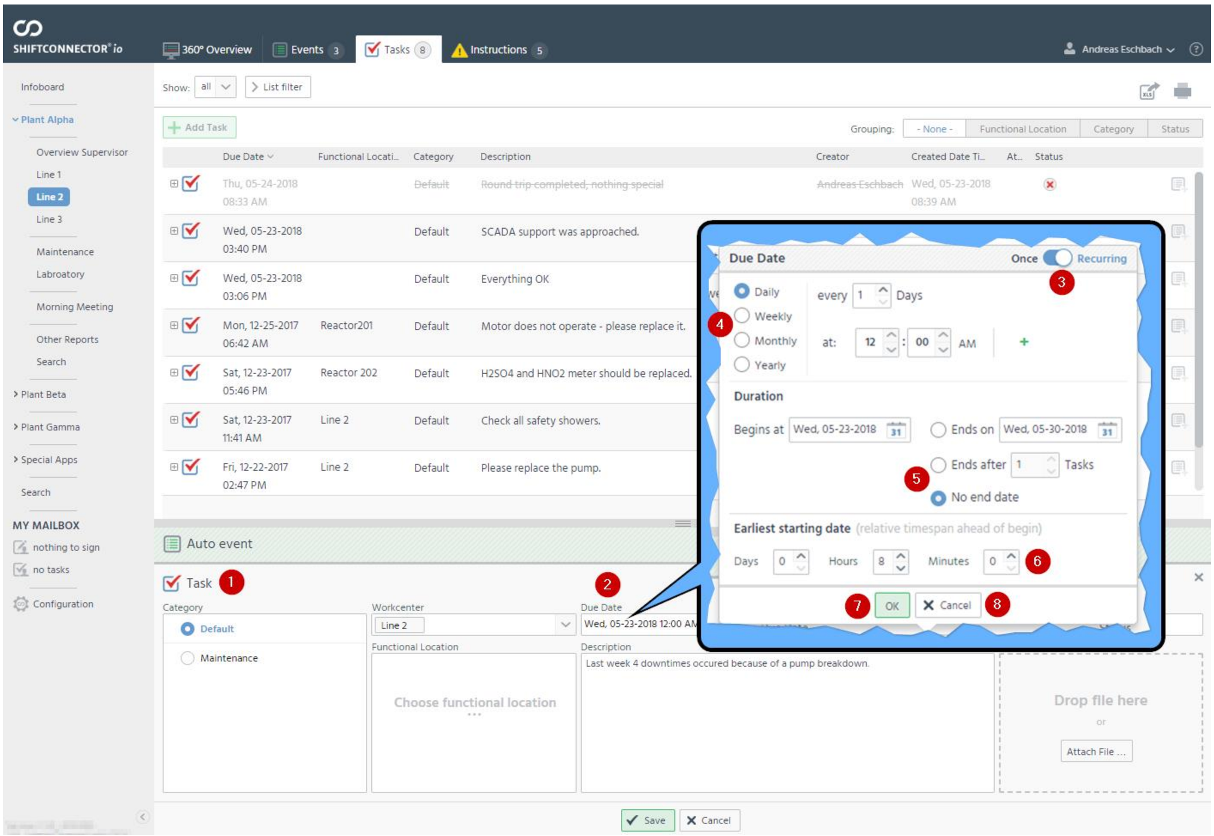
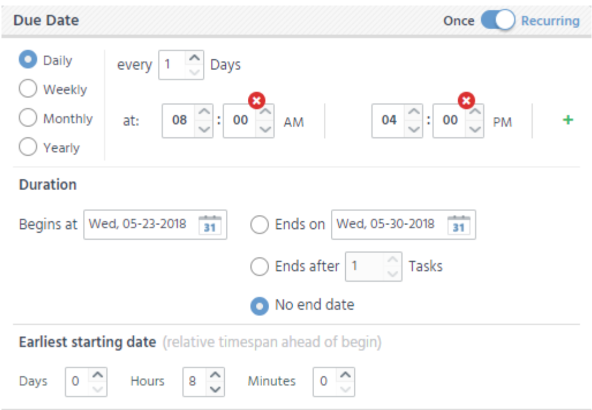


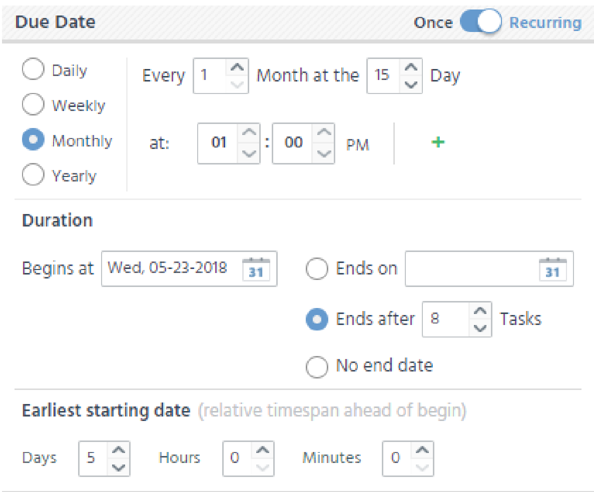
Figure 5.2.5-1: Create a recurring task.

#	Name	Description
1	Task entry form	The task entry form in edit mode
2	Due date component	The due date component pops up when you click on the date field
3	Recurring	Click this switch, to create the task as "*Recurring*"
4	Interval selector	Here you can select at which interval the task shall become due£
5	Duration	Here you can define when the task shall be completed, if at all

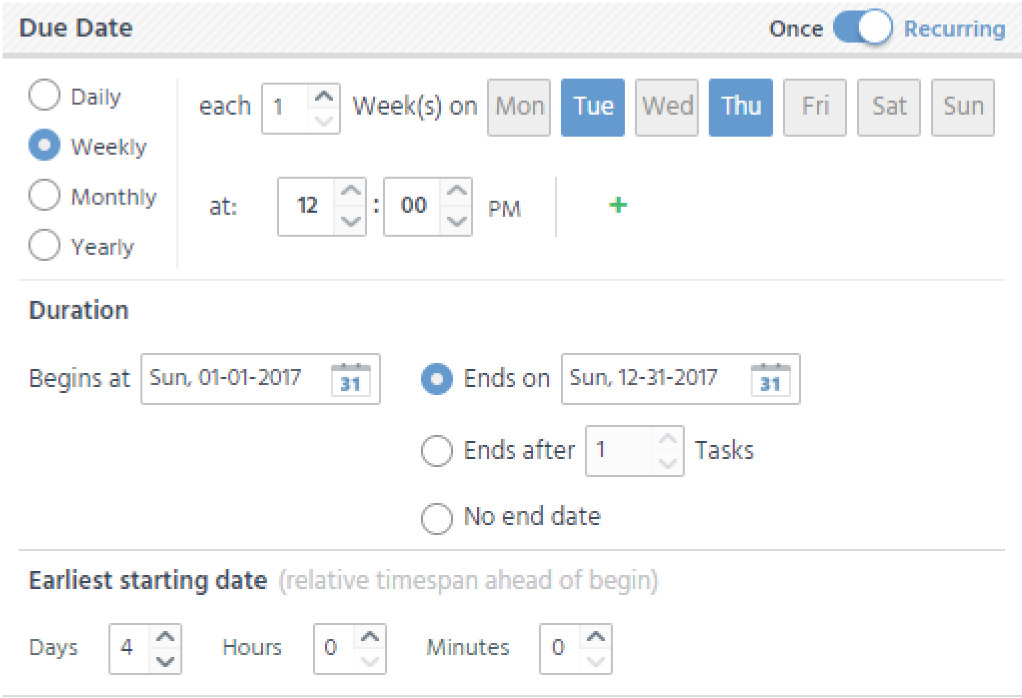
6	Earliest starting point	When the due date approaches, the status will be set to '*Open*' automatically. Here you can enter how much before the approaching due date this should happen.
7	Ok	If you click here, you accept the selections you made and the popup will close. It is however only saved once you save the entire task.
8	Cancel	If you click here, you discard the selections you made and the popup will close. It is however only saved once you save the entire task.

Some more examples

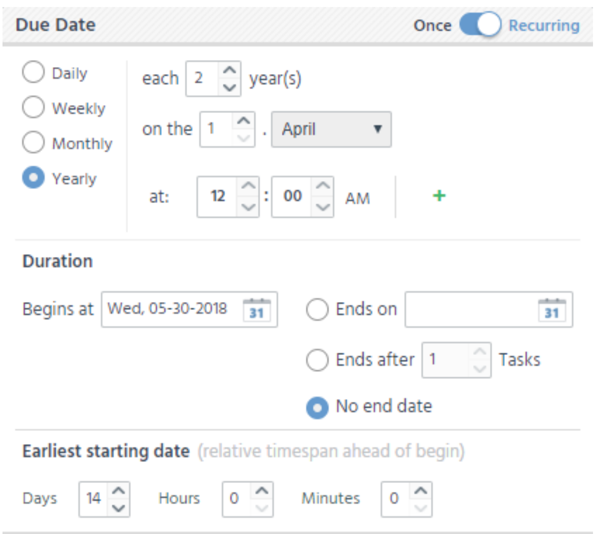




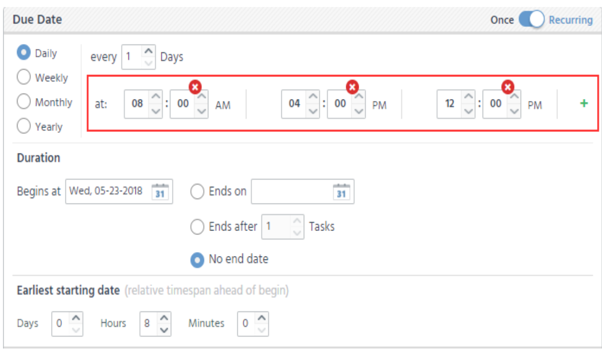
Due daily, at 8am and 4pm, open-ended	Due monthly on the 15th, ends after 12 tasks. The task status will be set to open 2 days before due date approaches.



Due twice-weekly, Tuesday and Thursday, at midnight, starting January 1st 2017, ending December 31st, 2017. The task status will be set to open 4 days before due date approaches.



Due every 2 years on April 1st, open-ended. The task status will be set to open 14 days before due date approaches.



Note: For any choice of interval you can add as many times per interval as you would like the task to become due!

Figure 5.2.5-2: Examples of recurring tasks.

5.2.6 Personal tasks

You might want to assign a specific person or persons to a task rather than workplace. Your administrator will have configured this optional functionality in your system if this should be available to you.

Your menu bar will look slightly different if you do have it available in that you have an indication of any open tasks assigned to you:

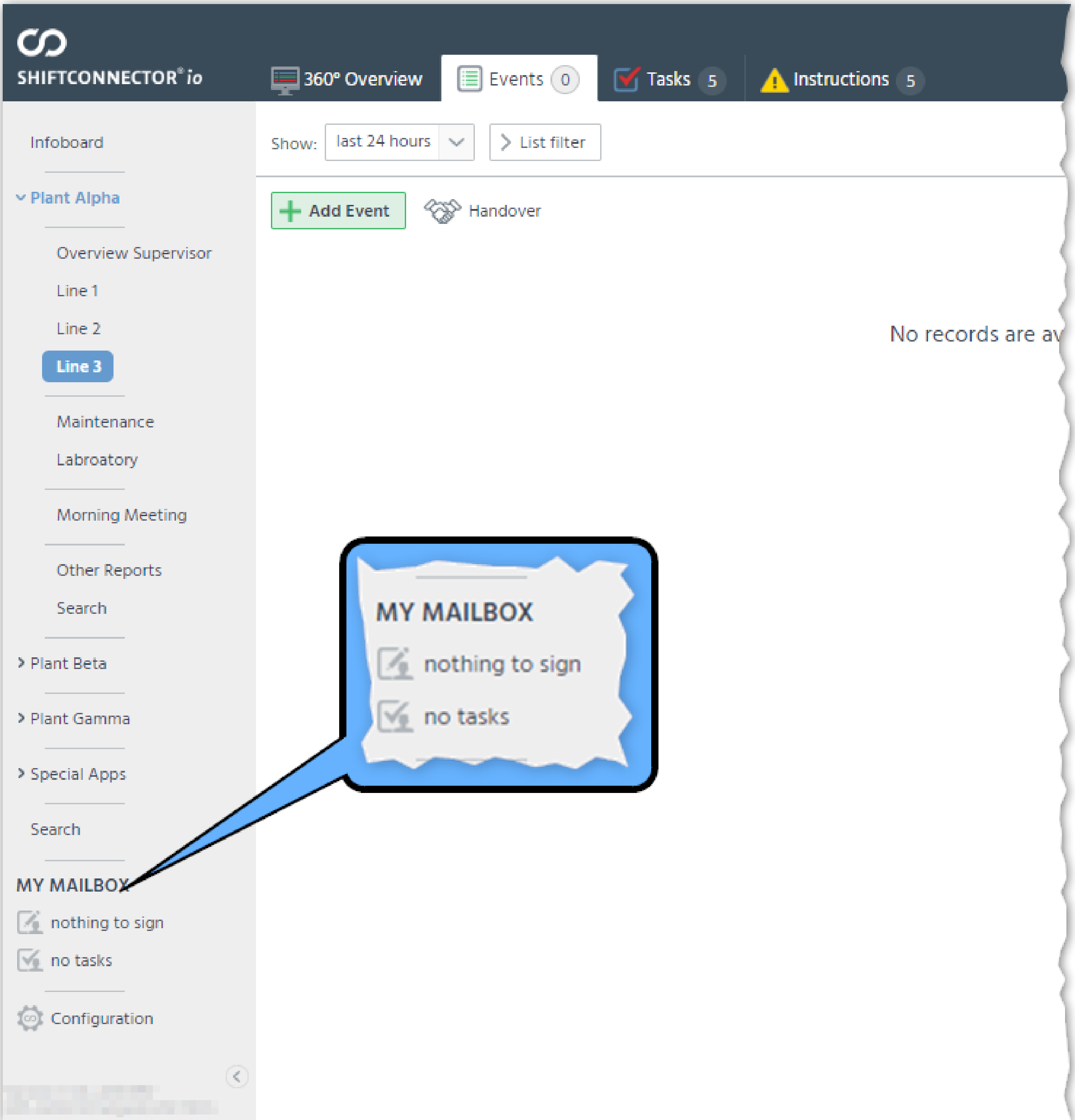


Figure 5.2.6-1: Personal tasks in the navigation area.

Below the indicator about signatures pending, there is now another indicator to tell you, in this instance, that there are no open tasks assigned to you!

Let's have a look now how you would assign a task to someone.

5.2.6.1 Creating a personal task

As mentioned before, Shiftconnector® io has to be setup for this, and you must choose a task form template which has the ability to become personal.

As with a normal task, open the Tasks tab and click the Add Task button to create an entry. The form will provide you with an extra field to enable you to make this task personal:

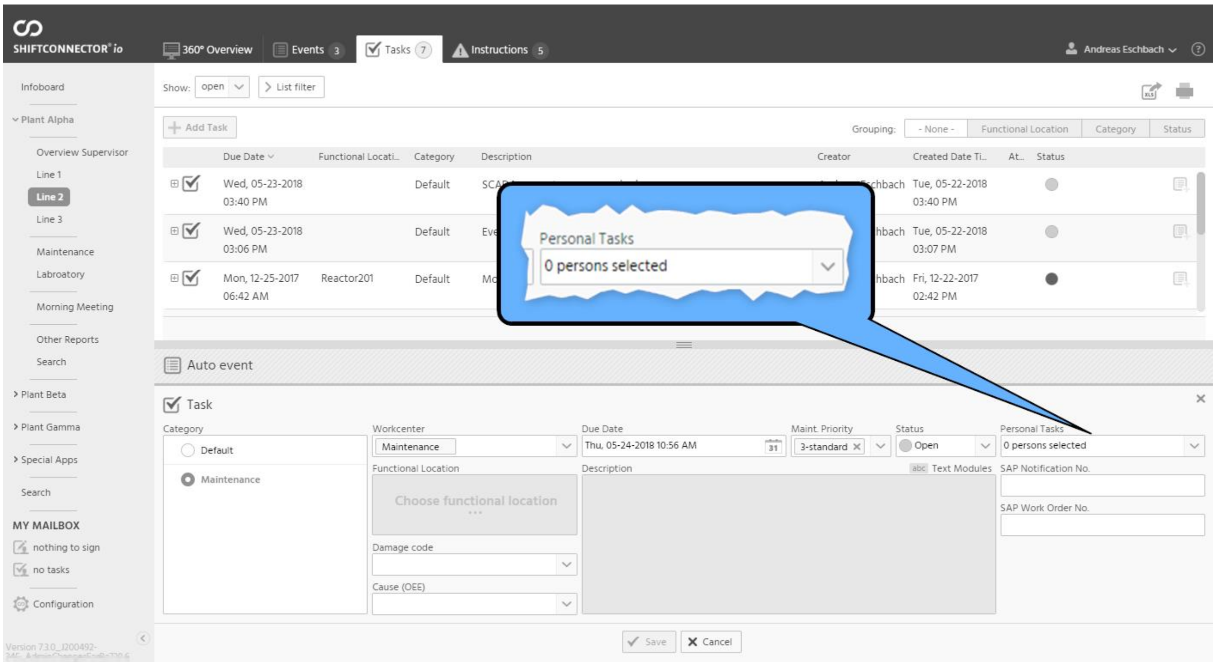


Figure 5.2.6.1-1: Personal task field.

You will be presented with the following popup:

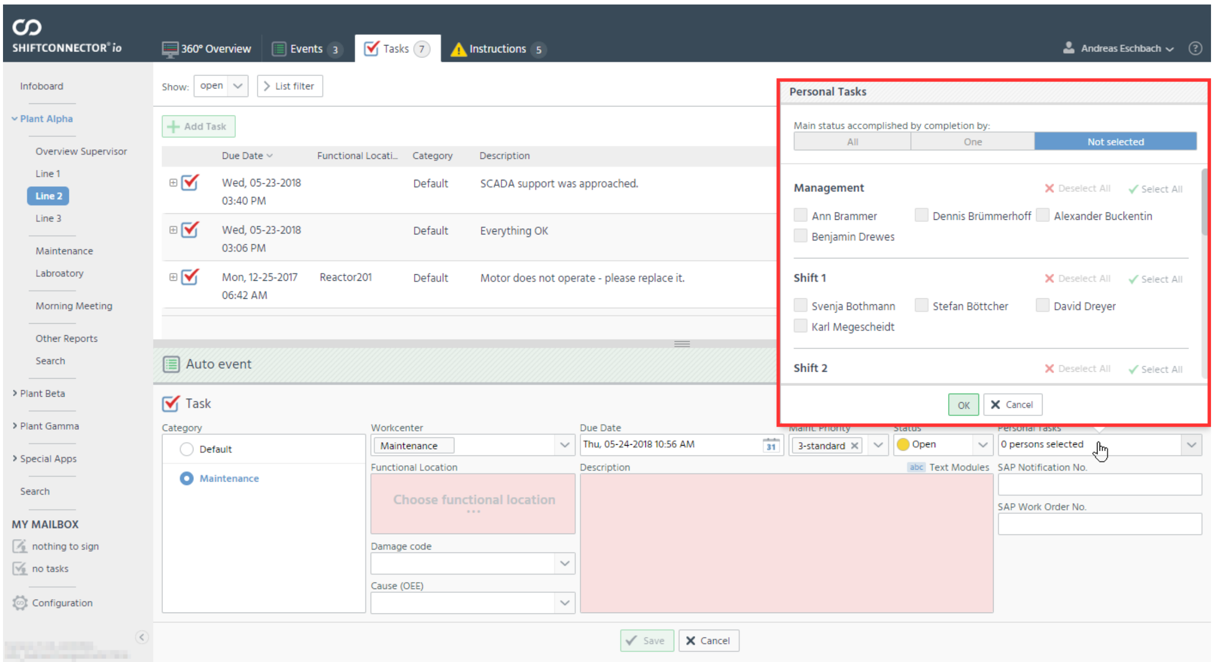


Figure 5.2.6.2-2: Popup Personal task field.

At this point you need to make the following decision first:

❖ For the task to be marked as completed overall, do all users have to complete it or just one?

Example for *One*: You might assign two colleagues a task to maintain an engine. As soon as one of them has done it, the overall task is considered as done.

Example for *All*: All laborers need to check the protection of their shoes, so all of them are assigned this task, and the overall task is only considered done, when all assignees have done it.

Also refer to *5.2.6.4 Dependencies between personal task status and main task status.*

Once you know this, you can make your choices on the popup:

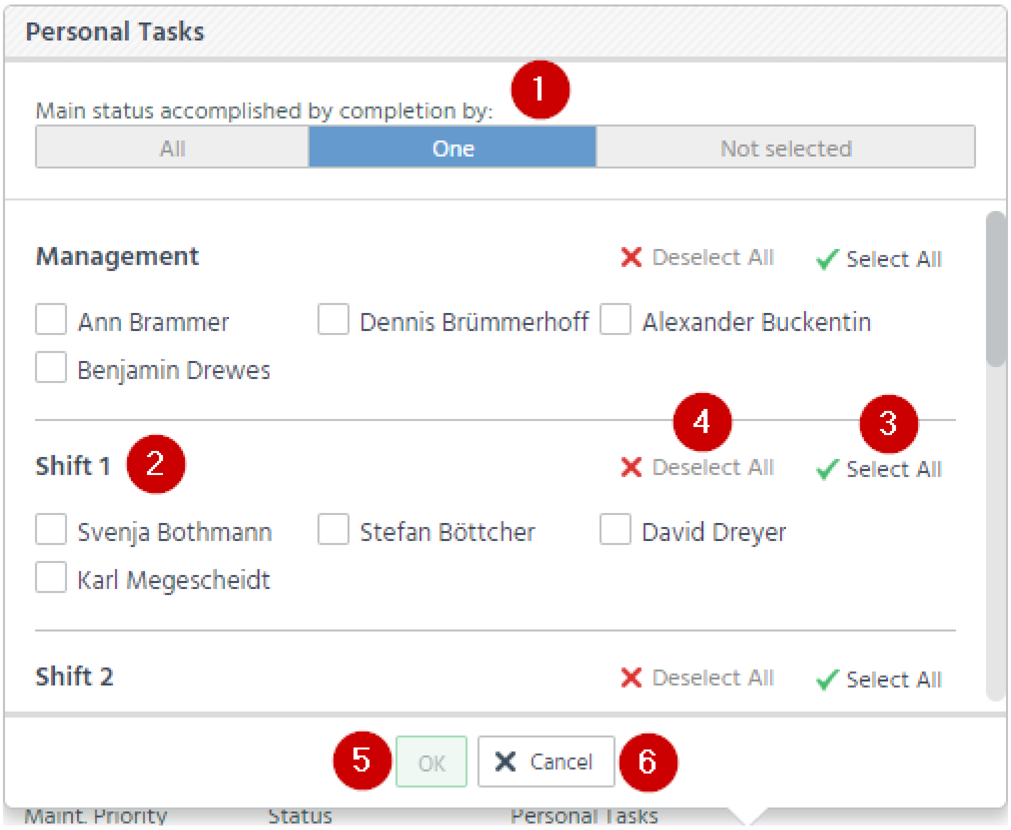


Figure 5.2.6.1-2: Selection Personal task.

#	Name	Description
1	Completion threshold	On opening of this popup, this choice is *Not selected* and all entry fields on the form are disabled. Once you select either *One* or *All* the entry becomes enabled. ❖ *All* means that all users assigned to this task have to complete it by setting their personal status of the task to *Done*, for the entire task to be set to *Done*. ❖ *One* means that of all users assigned to this task only one has to complete it by setting his personal status of the task to *Done* for the entire task to be set to *Done*. If you only assign one user to it, it does not matter if you click *One* or *All*.
2	User list	This is a list of users, group by team. This is exactly the same list as you would see it for signature selection.
3	Select all	With this button you can select all users of a team at once.
4	De-select all	With this button you can de-select all users of a team at once.
5	Ok	Saves your choice and closes the popup
6	Cancel	Discards your choice and closes the popup

Once you made your selection, save your choice via the *OK* button.

Fill in the other data and save. This will look like this:

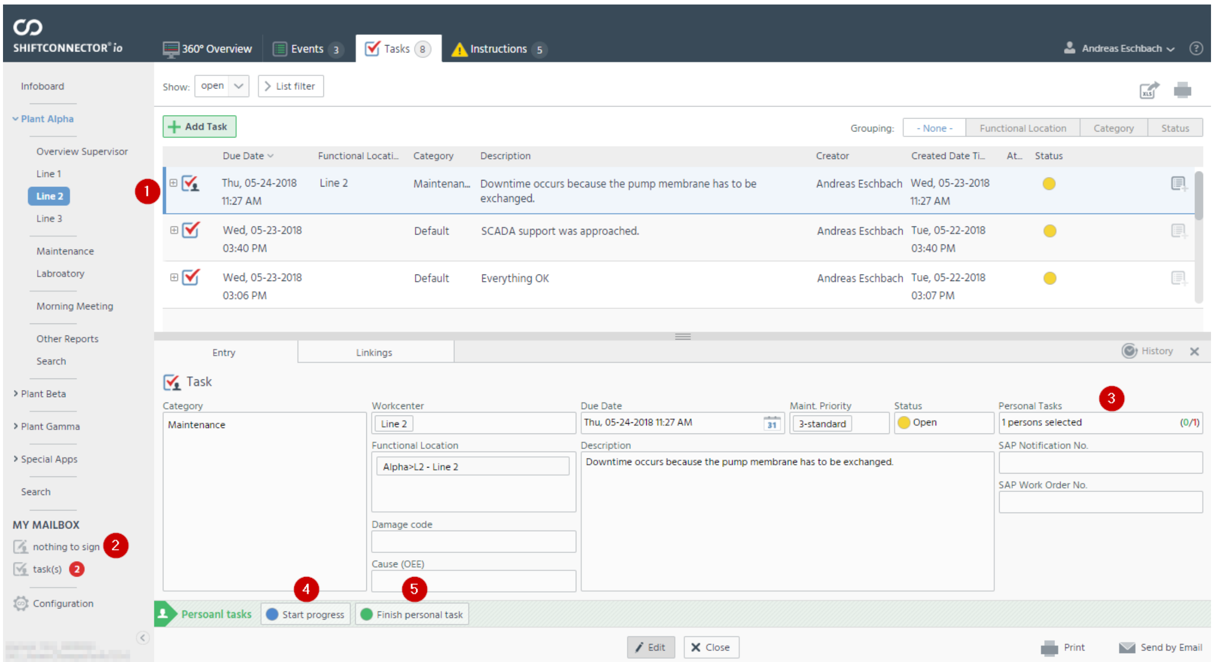


Figure 5.2.6.1-3: Personal task after creation.

#	Name	Description
1	Task entry	The entry of the task in the list looks much the same as a standard task, but the icon is different to point out that it is personal.
2	Personal task counter	In this example, you also assigned the task to yourself, so the counter is dynamically updated on your menu bar. If you click on the counter, the personal task list opens. We will look at this on the next screenshot.
3	Personal task indicator	You see from the content of the field that two persons have been assigned this task. The number in green shows you how many have completed the task and the number in red how many haven't.
4	Start progress button	This is shown to you because you are one of the owners of this task. If you click it, your personal status will be set to *In Progress*.
5	Finish personal task button	This is shown to you because you are one of the owners of this task. If you click it, your personal status will be set to *Done*. Note: The workflow does not require for the task to be set to *In Progress* first!

After clicking *Task(s)* from the menu bar, your personal task list opens:

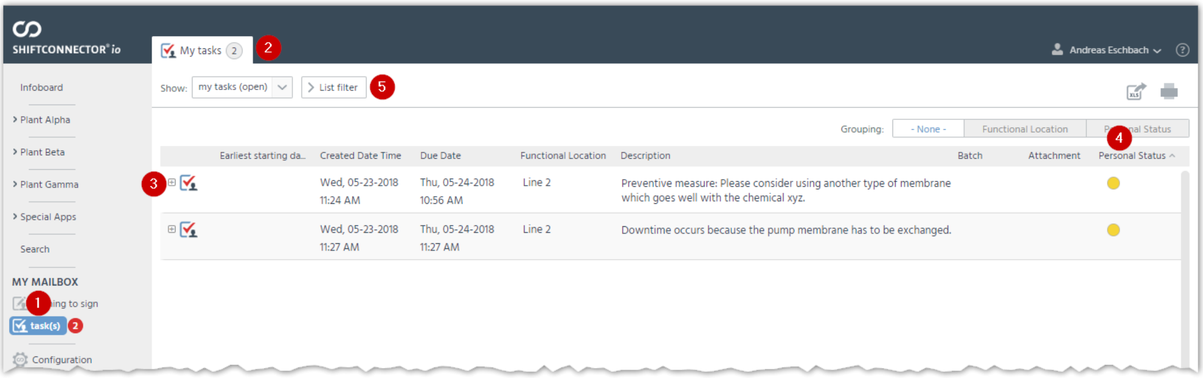


Figure 5.2.6.1-4: Personal task list.

#	Name	Description
1	Counter Personal tasks	The highlighted Menu link with counter
2	Personal task tab	A tab showing your personal tasks as configured by your administrator
3	Personal task list	A list showing your personal tasks as configured by your administrator
4	Personal task status	Here your personal task status will be displayed if your administrator has configured it that way.
5	List templates and filters	You have a choice of templates and filters as with standard tasks.

Clicking on a task in the list shows its detail view again. Clicking the Personal task field shows you the current status of the task. In this example, the overall status has changed to *In Progress*, as an assigned person has set their personal status already to *In Progress*. Your own, however, is still *Open*.

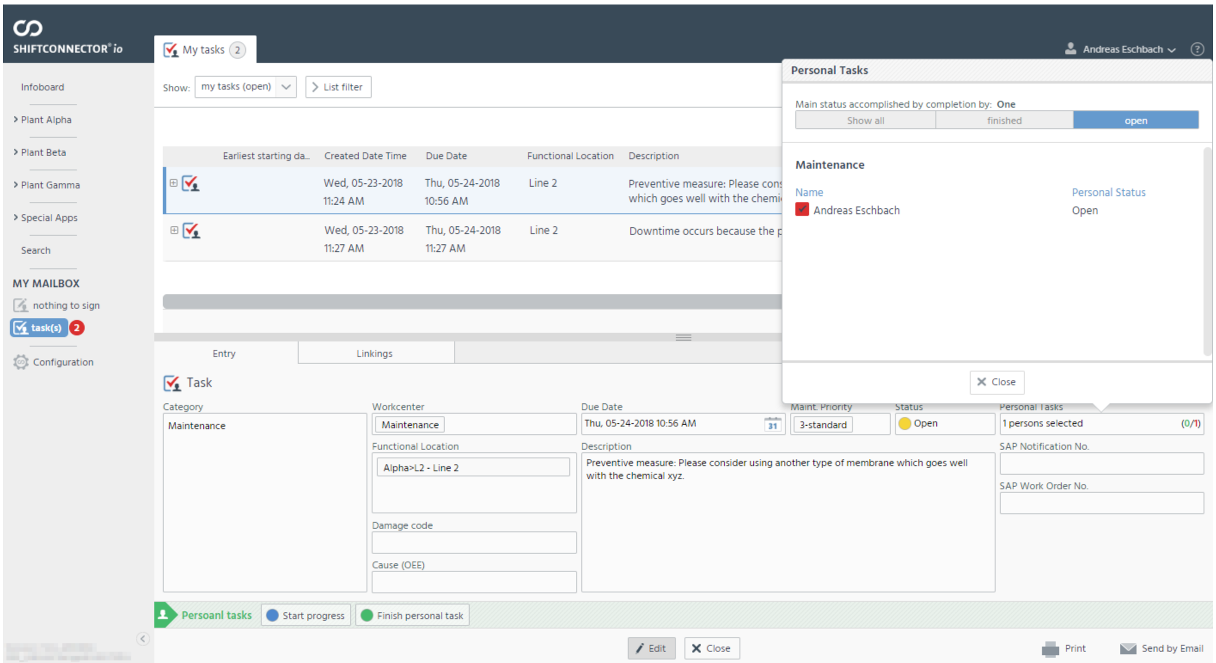


Figure 5.2.6.1-5: Status Personal task.

5.2.6.2 Starting progress on a personal task

To set the task in progress, you can either click on the personal status field on the list, or on the equivalent button on the Personal Task panel. You will be prompted by the system to enter a comment for the status change, if it was configured that way by your administrator:

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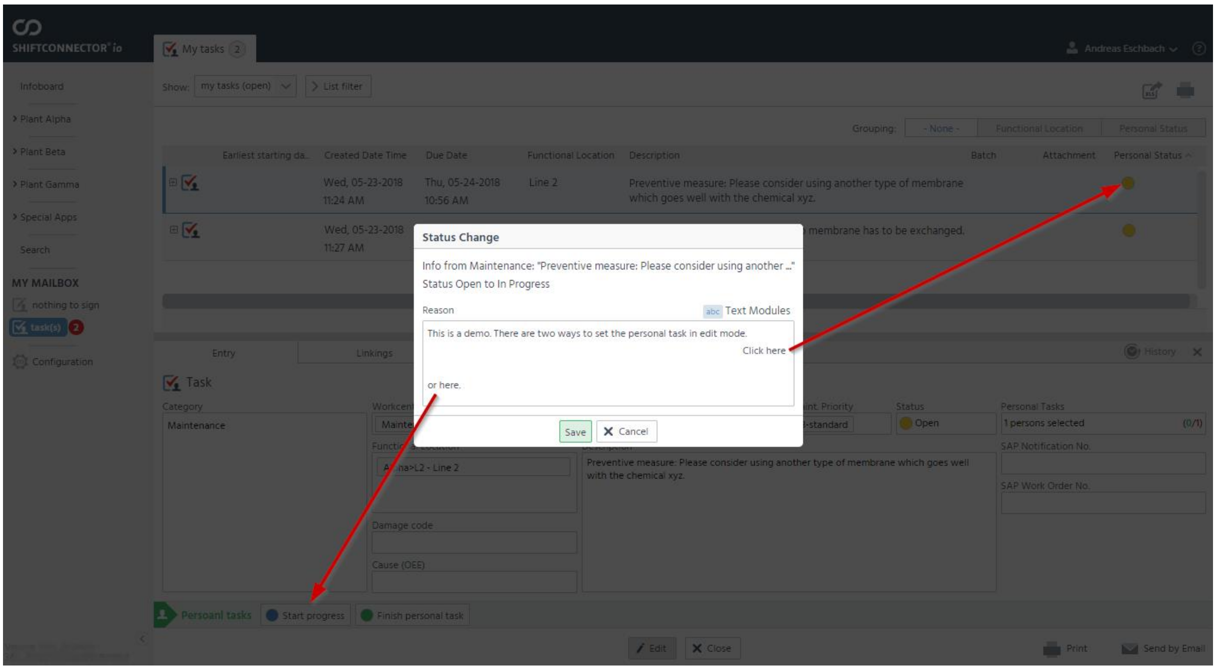

Figure 5.2.6.2-1: Personal task – Status change.

Enter the comment and Save. You'll be presented the detail view again, with the action reflected.

The status has changed to 1 *In Progress* and the 2 *Start Progress* button has disappeared.

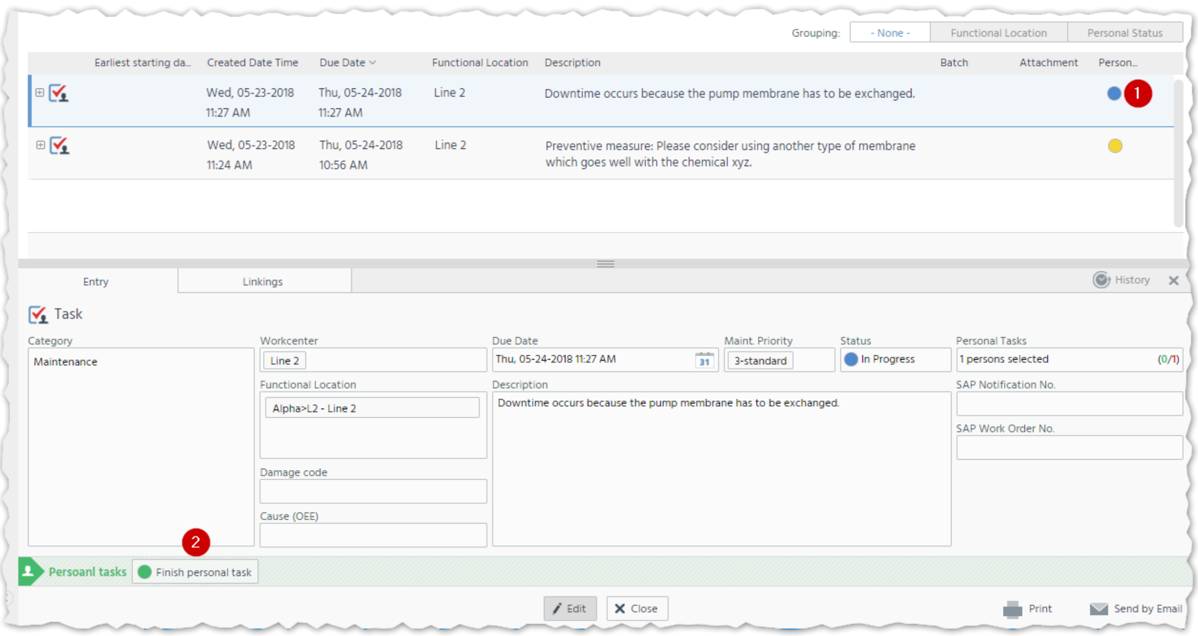

Figure 5.2.6.2-2: Personal task – In Progress.

5.2.6.3 Completing a personal task

Once you have done the task, enter this into the system the same way as putting it into progress, i.e. click the relevant button *Complete personal task*, enter the change comment and save. Then your Personal status will be set to *Done* and the specific Personal Task panel has disappeared now.

In our example the overall status has also been set to *Done*, as the personal task had only to be done by one person. If all persons would have had to complete the task, the overall status would have stayed *In Progress*:

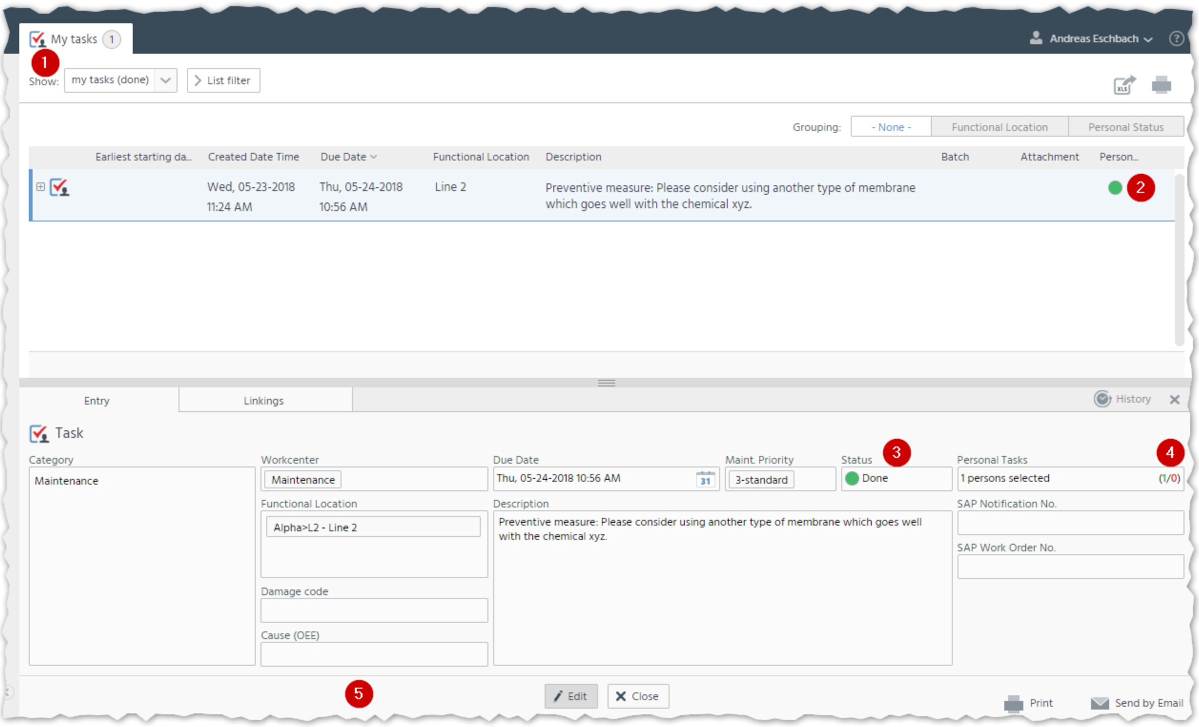

Figure 5.2.6.3-1: Personal task – Done.

#	Name	Description
1	Completed tasks	List of completed personal tasks
2	Personal task status	Your personal task status is now set to *Done*.
3	Overall task status	The overall status in this case is *Completed* too.
4	Personal task field	Although the task has not been completed by one person, the overall status is set to Done as the task only had to be completed by one person (see *Figure 5.2.6.1-3 Selection Personal task*).
5	-	The Personal Task panel has disappeared.

A history version of the task and its assignments will be created in case of resetting all personal status to open – the same behavior as you have for signatures.

5.2.6.4 Dependencies between personal task status and main task status

The main status of the task is changed depending on the personal status of the assigned users.

If just one assignee has to finish the task only for it to be complete overall, the main status is always set to the same as the personal status of the person which has progressed the furthest.

If all assignees have to complete the task for it to be complete overall, it is a little more complex. The following table shows the effect of a personal status change of any assignee on the main task status:

		Main status auto-changed to:
First assignee sets personal status to:	(Open)*	(Open) *(Default after task creation)
	In Progress	In Progress
	Done	In Progress *(no change)*
	Back to open	In Progress *(no change)*
Last assignee sets personal status to:	(Open)*	(Open)
	In Progress	In Progress
	Done	Done
	Back to open	Open

Should you be changing the overall status directly, you will be presented with a specific Yes/No-Message, and, depending on your answer, the resulting action is different:

Main Status set to:	Message	Result
Open	Attention: You are changing the main status of this task to open! This task has been started or completed by one or more other users. If you save it, all current set status of the assignees will be reset to open too! Do you really want to change it?	Yes – Reset status of all assigned users to open when the user saves No – Reset main status selection to the previous one
In Progress	Attention: This task has been assigned to one or more other users. This is the main status of the task, not your personal status! Do you really want to change it?	Yes – Change the main status of the task when the user saves. No - Reset main status selection to the previous one
Done or Deleted	Attention: You are changing the main status of this task to done or deleted! This task has been assigned to one or more other users. If you save it, the tasks will disappear from the list of personal tasks of the assignees! Do you really want to change it?	Yes - Change the main status of the task when the user saves. No - Reset main status selection to the previous one

5.3 Instructions

> It is dependent on how your administrator has configured your workplace and your forms and which data is required for you to enter. **So, the following screenshots are to be viewed as an example only.**

5.3.1 Creating an instruction

There are three ways how you can create a new instruction. The difference lies in how you initiate the creation. The result however will always be the same: The created instruction will be a child entry of an event. This will be explained in detail further down.

5.3.1.1 Scenario: Creating an instruction before the event

On the workplace where you want to add an instruction, choose the *Instructions* tab:

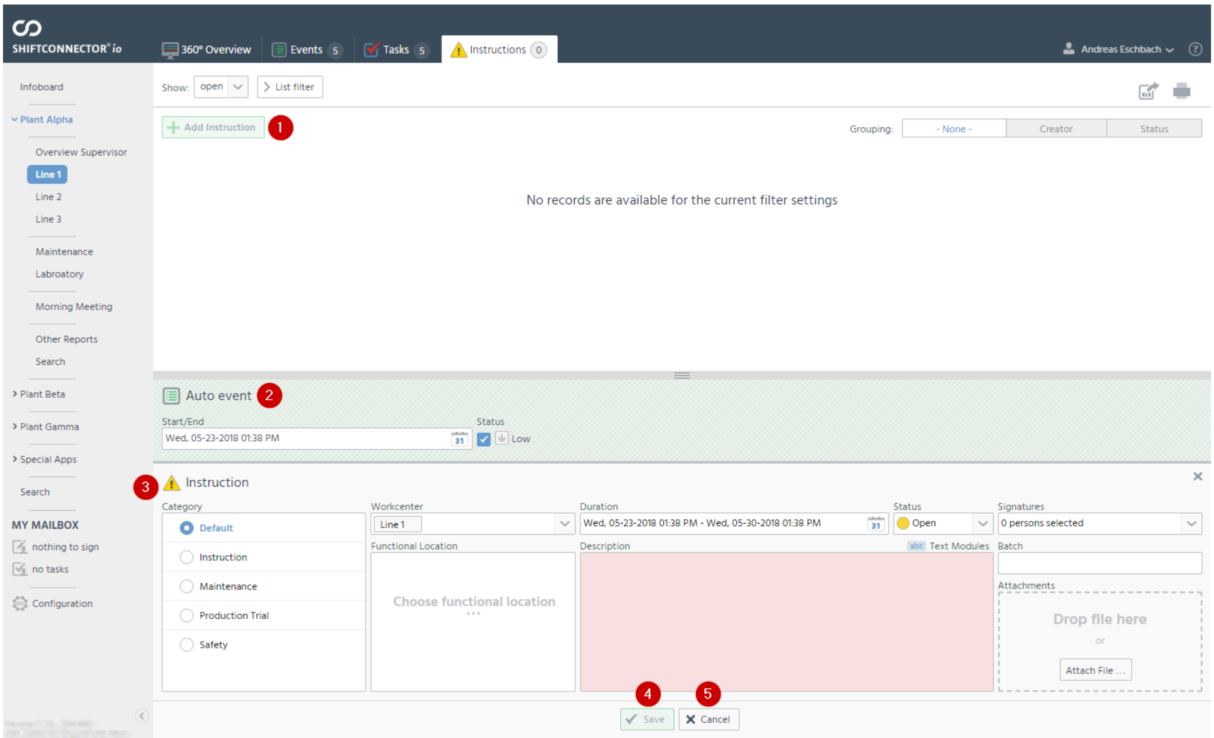

Figure 5.3.1.1-1: Create instruction.

#	Name	Description
1	Add Instruction	From your list, click this button to open the entry form.

2	Auto-event area	Here any configured auto-event fields which you can enter will be shown.
3	Instruction entry form	As mentioned before, this is an example form.
4	Save	Save your entry. The button is disabled until you have entered all the mandatory fields correctly (red fields).
5	Cancel	Discard your entry

Every time you create an instruction in this way, a “parent” event (known as *auto-event*) is created automatically in the same Shiftbook.

You don’t have to enter anything for it, in fact, configuration might be such that you *can’t* enter anything. But if it is, you find the entry zone for this above the new task as you see above at 2.

After adding the mandatory fields for the instruction and saving, you cannot only see the new instruction on the instruction tab

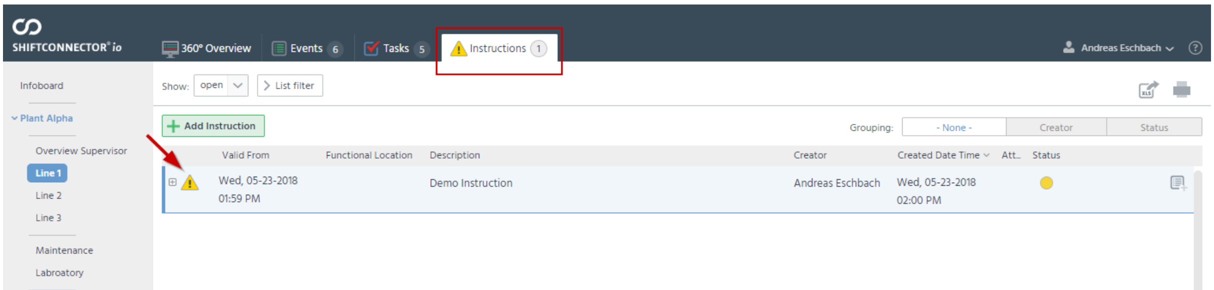

Figure 5.3.1.1-2: Instruction in list.

but also below its auto-event on the event tab:

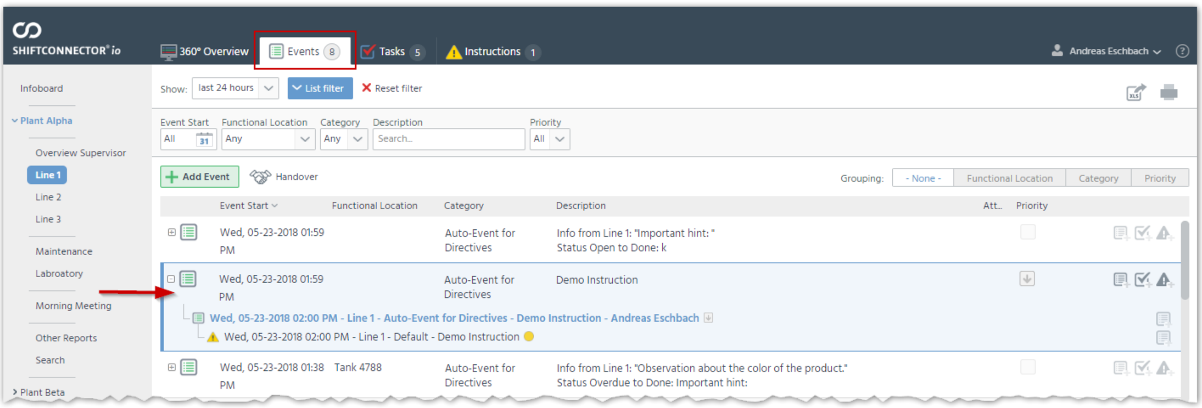

Figure 5.3.1.1-3: Instruction in list.

5.3.1.2 Scenario: Creating an instruction at its event creation

In this scenario you will start creating the event first. So, note that the following screenshot shows the event tab:

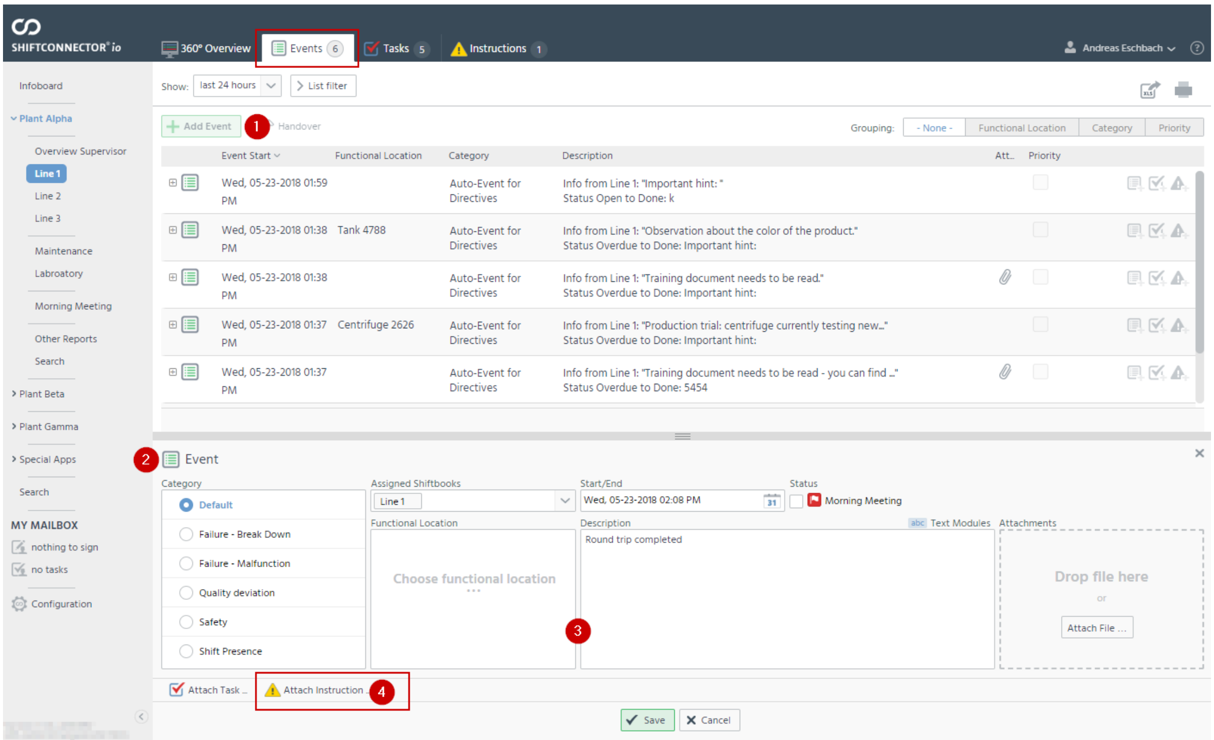

Figure 5.3.1.2-1: Button Instruction at event creation.

#	Name	Description
1	Add Event	*Add Event* button. Clicking this will open the configured entry form for the event.
2	Event entry form	Event entry form
3	Mandatory data	Here you enter the necessary data for the event. By default, or through configuration some of these fields might be copied automatically into the corresponding fields of a task or instruction which you attach to this event. This is called "*parent copy".*
4	Attach instruction	*Attach instruction* button. Click this to open the instruction entry form.

Now, if you click the button at 4 a instruction entry form opens as well:

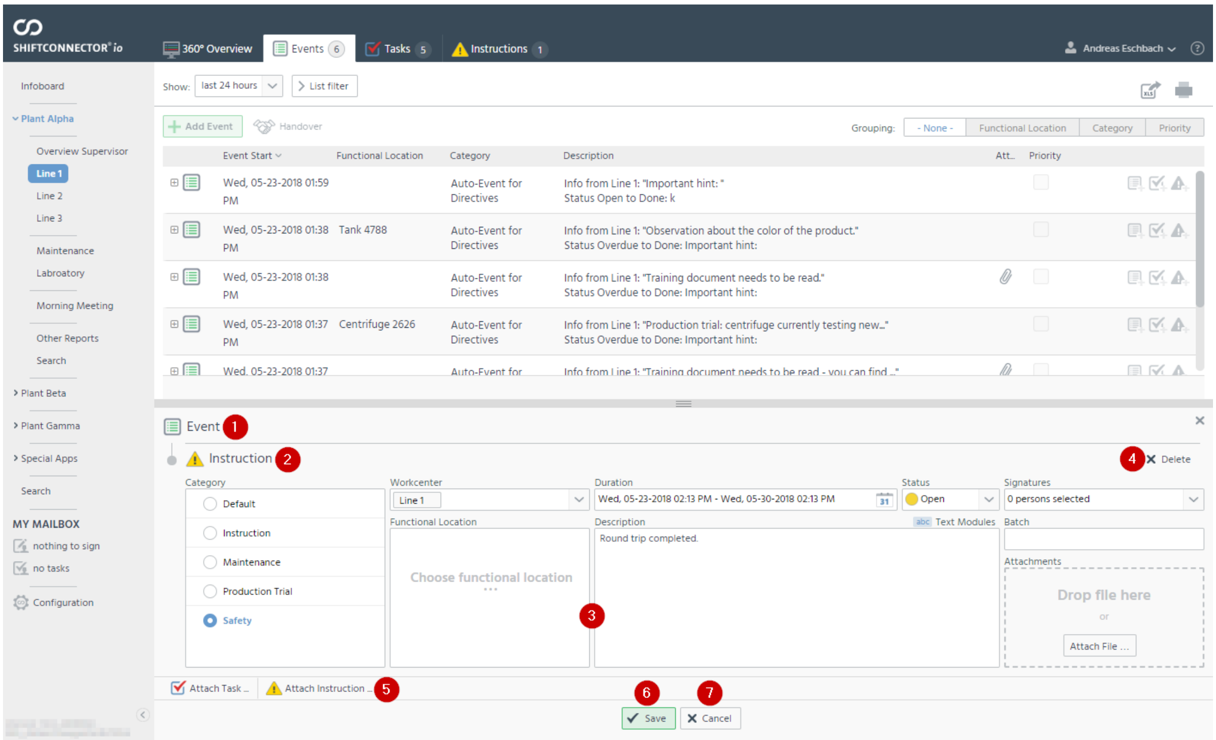

Figure 5.3.1.2-2: Create instruction directly with the event.

#	Name	Description
1	Event	The event from earlier gets moved into the background to display the form for the instruction.
2	Instruction entry form	The Detailview for the instruction entry form is opened here.
3	"*Parent copy*" data	The entries made for functional location and description have been copied over from the event as described earlier. This is configured this way by your administrator and might not behave exactly this way if it has been done differently.
4	Delete	If you have opened up an instruction entry form by mistake, you can remove it again with this button. This is only possible before the first save!
5	Attach task button	Note that you could add yet another instruction to the event, or even many more.
6	Save	Now when clicking Save, both the event and its attached instruction get saved.
7	Cancel	This will discard both entries.

Before saving you still can change your event entry. Just click the link „Event" 1.

After adding the mandatory fields for the event and instruction and saving, you can see the new entries in the list on the event tab

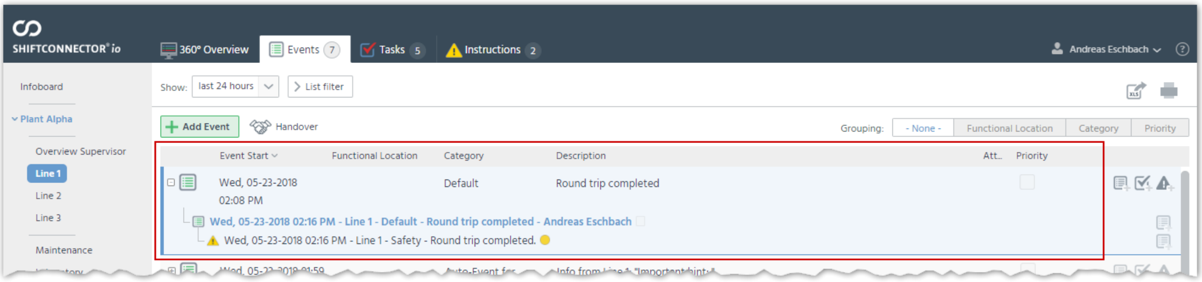

Figure 5.3.1.2-3: Instruction in event list.

as well as in the list on the instruction tab:

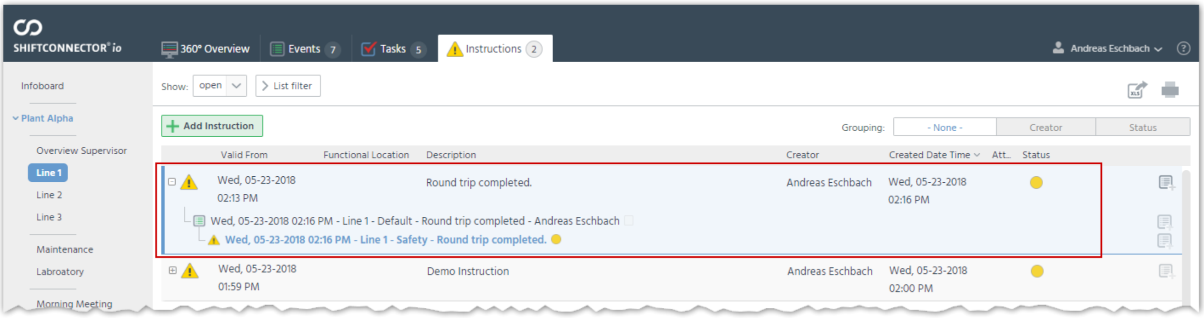

Figure 5.3.1.2-4: Instruction in instruction list.

5.3.1.3 Scenario: Creating an instruction and attaching it to an existing event

Sometimes you might want to add the event but don’t know until later what instruction you might want to attach to it. This is how you proceed in such a case:

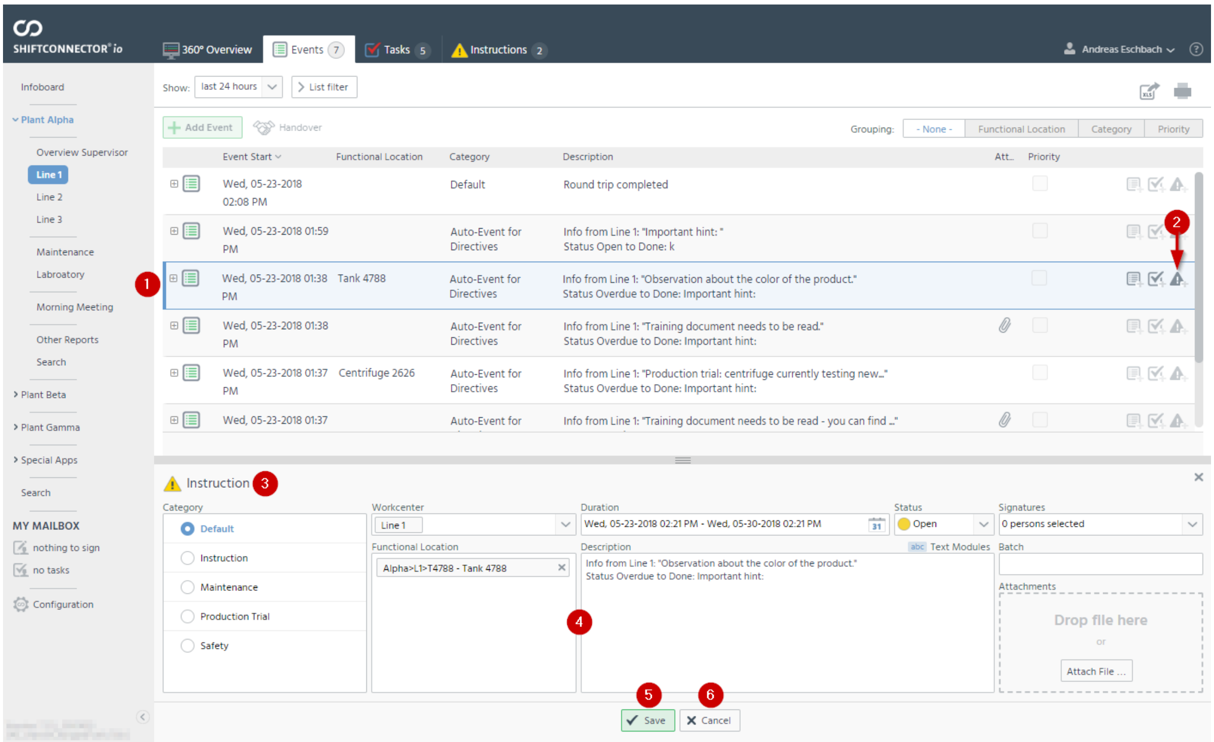

Figure 5.3.1.3-1: Attach instruction to existing event.

#	Name	Description
1	Event	The event you want to attach an instruction to.
2	Attach instruction	Click this button to open the entry form for the instruction as configured by your administrator.
3	Instruction entry form	This form will open in edit mode for you.
4	“*Parent copy*” data	These fields have been copied from the event as described earlier.
5	Save button	Saving this will link the new instruction under the existing event.
6	Cancel	This will discard all the changes but not change the existing event in any way.

5.3.2 Updating an instruction

Updating an instruction is as simple and is initiated exactly the same way as updating an event, refer therefore to section *5.1.2 Updating an event.*

5.3.3 Deleting an instruction

You cannot delete an existing instruction. It is possible however to set a status *Deleted*, which will filter it out of most list templates. If it is shown, the data is struck through so you can easily pick it out:

Figure 5.3.3-1: "Deleted" instruction.

5.3.4 Instruction status

The status of an instruction shows you at what point of life the instruction is, if it is open or already done. Those statuses you can set yourself. If the status is open and the task's estimated end date has passed, the system will automatically set it to overdue. See the following graph:

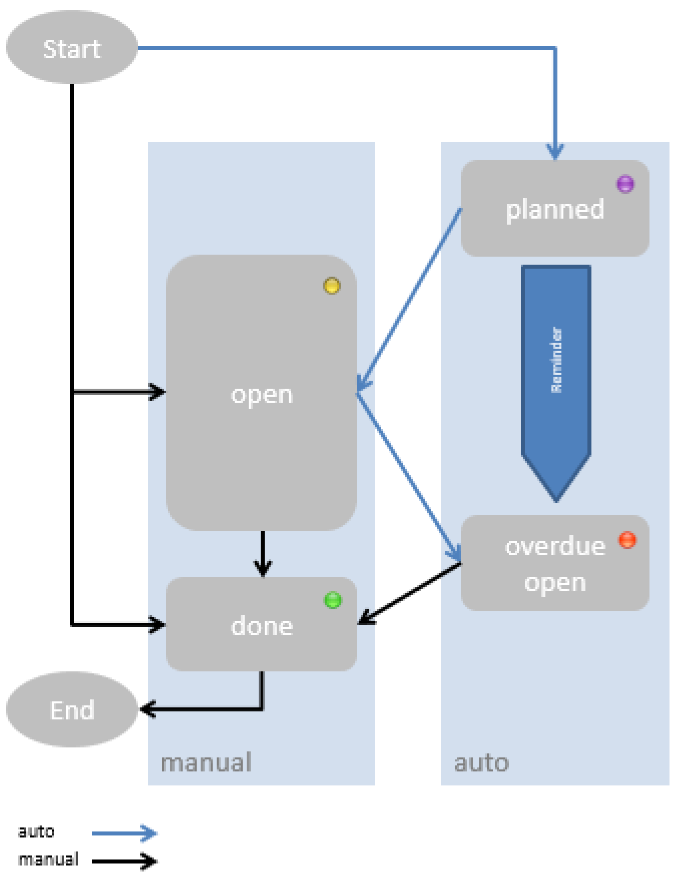

Figure 5.3.4-1: Sequence of instruction status with colored indication.

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5.4 Signature requests

This functionality is available for events and instructions, if configured by your administrator.

5.4.1 Making signature requests

If your administrator has configured forms containing the signature component, you are able e.g. to request signatures from one or more people for them to acknowledge they have read the entry you've made:

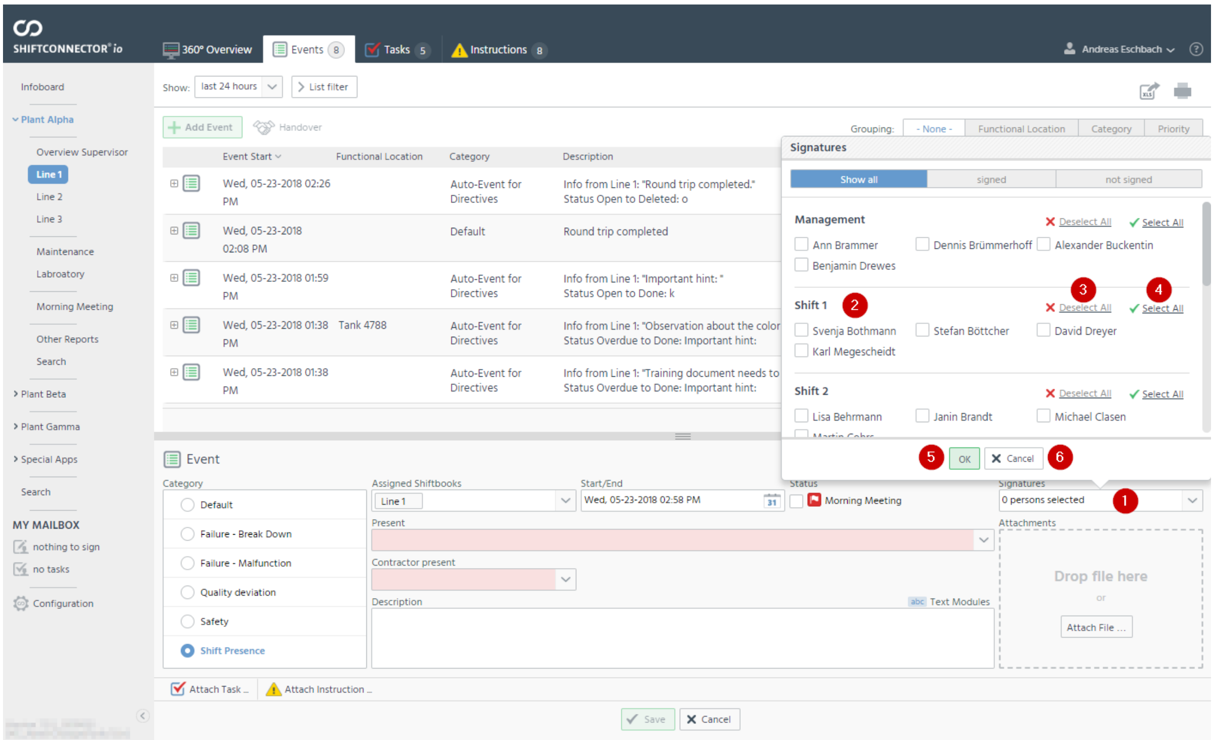


Figure 5.4.1-1: Request signatures.

#	Name	Description
1	Signature chooser	Click this field to open up a list of users which are available for selection.
2	User	Each available user in his team(s) has a checkbox for selection and visualization if selected or not.
3	Deselect all	When you click this button, all selections you have previously made are de-selected for this team.
4	Select all	If you click this button, all team members are selected.
5	Ok	This will close the signature chooser.
6	Cancel	This will discard all changes you have made since opening the control and close the chooser, retaining the selection as it was before opening it.

After closing the dialog, you receive feedback how many persons have been selected, how many have signed, and how many haven’t:

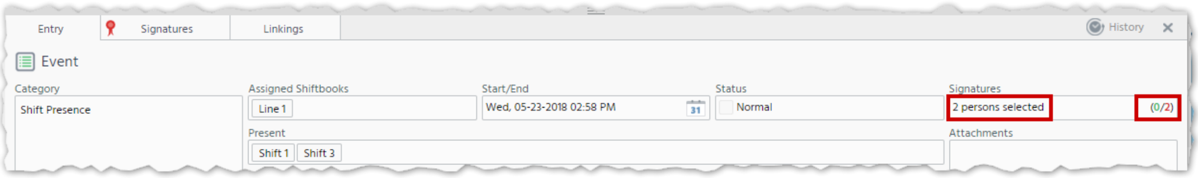


Figure 5.4.1-2: Signature field.

5.4.2 Signing an entry

If your administrator has configured forms containing the signature component, you might get a request to sign an entry every now and then.

On the menu bar this will be clearly highlighted to you, a counter in red shows you the number of outstanding requests for you. Clicking the signature item on the menu bar will open the signature list for you:

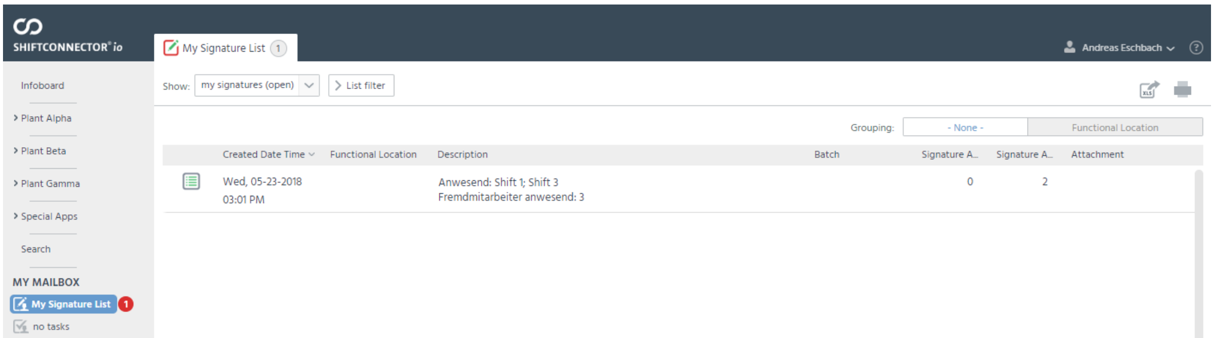


Figure 5.4.2-1: Signature field.

By clicking the desired entry, the Detailview will open, including the entry fields for the signature:

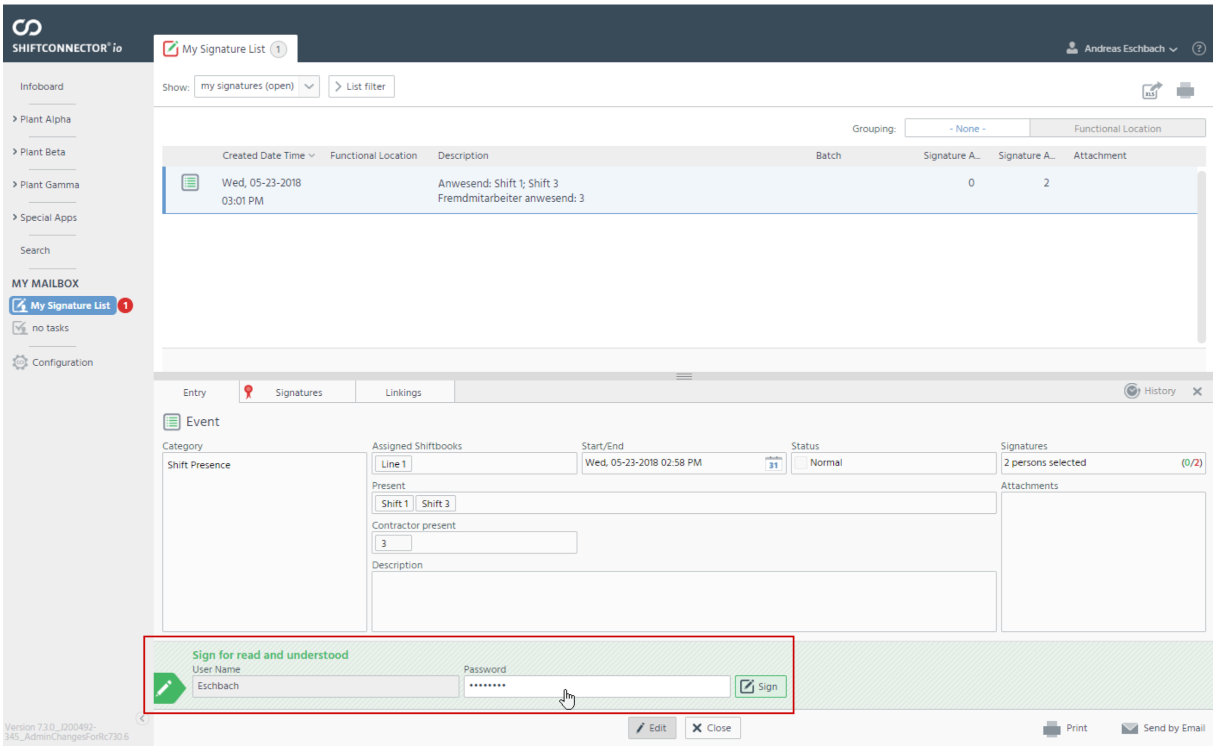


Figure 5.4.2-2: Sign the entry.

By entering user name and password and clicking on the *Sign* button, you confirm with your signature that you have read and understood the entry. It will now show in the list with entries already signed. Additionally, the counter on the menu bar gets reduced by one:

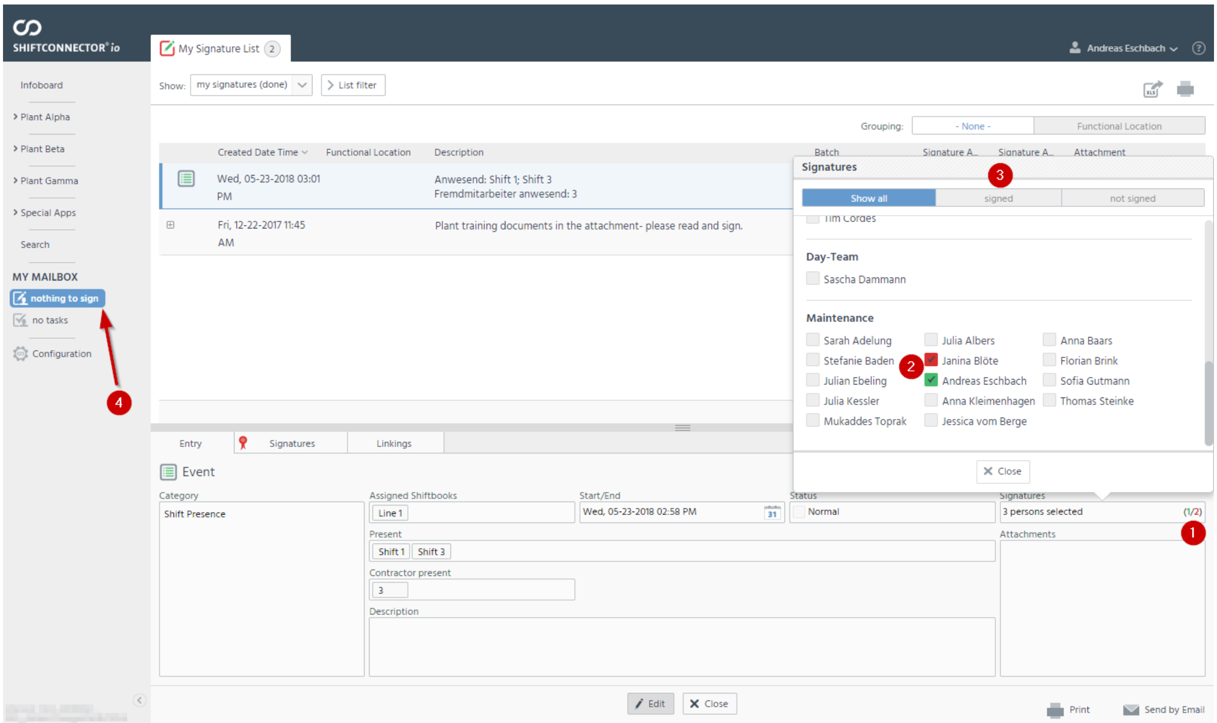


Figure 5.4.2-3: Signed entry and changed mailbox display.

#	Name	Description
1	Signature Feedback	The signature field shows you the current status of the signatures, i.e. here two persons have to sign, of which one already has done it.
2	Signees	The signees are clearly marked, the one which has already signed in green, the other one in red.
3	Filter	If many persons are requested for signature, this filter helps for a better overview who has signed and who hasn't.
4	Signature counter	The signature counter gets reduced after signing, in this case there is nothing to sign anymore.

5.4.3 Updating the requested signatures

It is not possible to remove a signature request once the signature has been given. However, a person requested to give a signature which is still outstanding can be de-selected from the selection popup.

Once a signature has been given, it is always attached to this version of the entry.

> If a change is made to the entry after signatures have been made, the updater will be warned that all the signatures will be requested again.

5.5 Working with lists

So now you know all about events, tasks and instructions, you want to know how you manage your growing data. As described earlier, pre-defined lists and filters have been provided for you, as well as configurable functionality to act on multiple records at a time. Here is how you use it.

5.5.1 Sorting

On opening, all your lists are sorted as pre-defined in the template. This can be seen what sort is in force by the instruction arrows in the column header (see arrow in *Figure 5.5.1-1 List sorted by start date*).

You can change the sort direction by clicking on the column header. Repeated clicking toggles the sort direction. The arrow adapts to the direction to show you the sort direction:

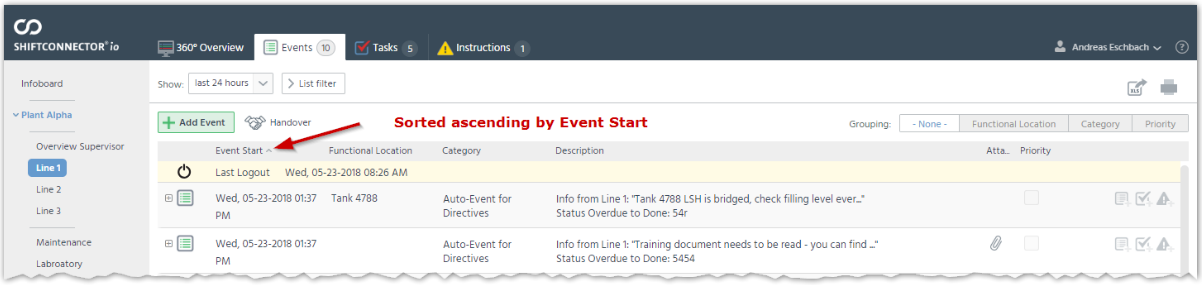


Figure 5.5.1-1: List sorted by start date.

If you want to change the column the list is sorted by, just click on the header of the desired column:

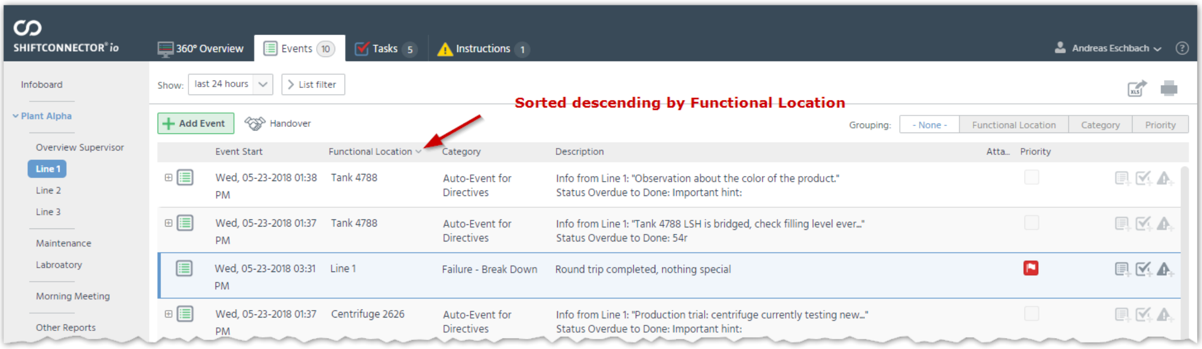


Figure 5.5.1-2: List re-sorted.

5.5.2 Grouping

On most of your list views you will be given various options to group the list (it might already be grouped by default). This has been pre-defined by your administrator:

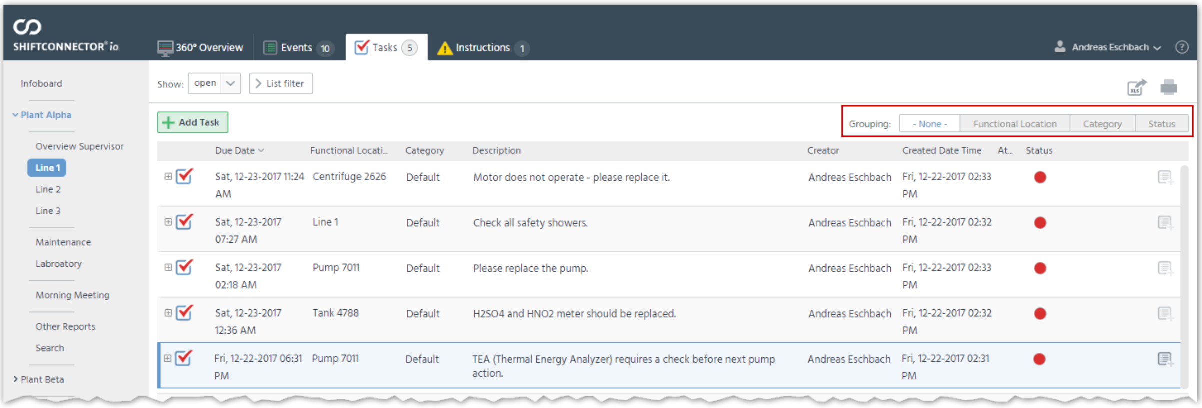


Figure 5.5.2-1: Ungrouped list.

If you want to group the view differently than the default, just use the buttons above the list:

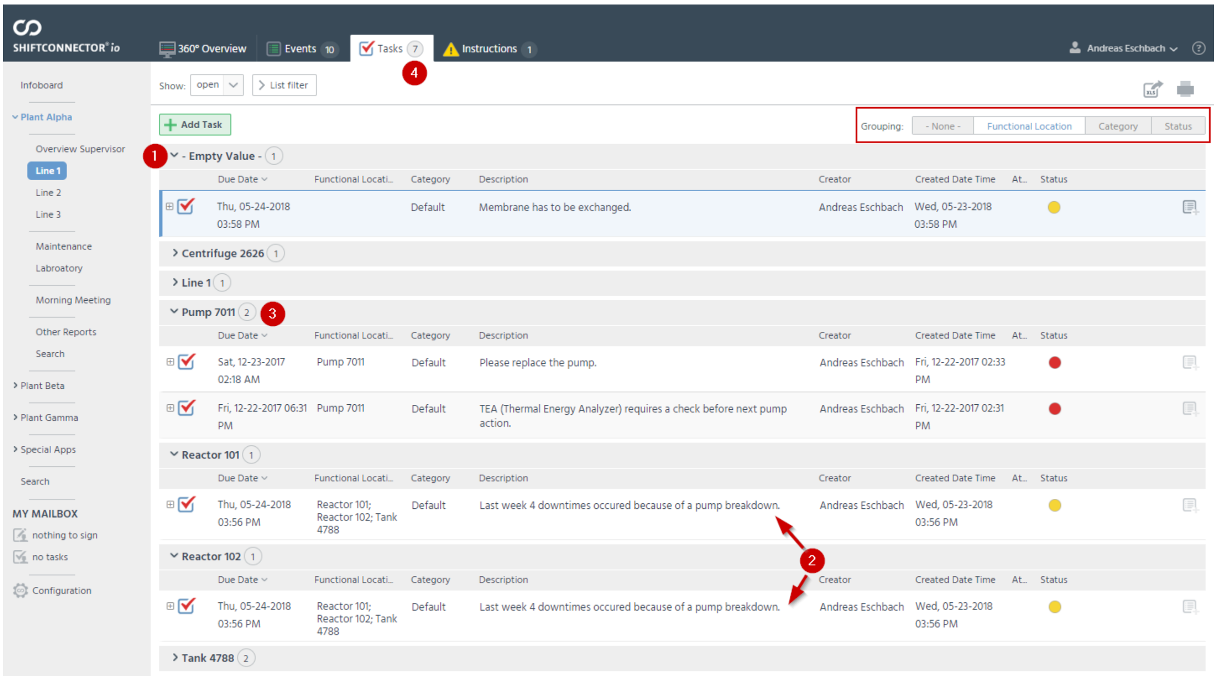


Figure 5.5.2-2: Grouped list.

The grouping here is by Functional Location. Each functional location forms a group. If the value is empty, the record gets listed under group *"- Empty Value –"* 1. Has the entry multiple values in the field to be group by, the record is listed once in each of these groups 2. Each group gets shown with a note of how many records are in this group 3. As an entry might be shown in multiple groups, as in this example, the sum of the entries in each group can differ from the number of records shown on the entry tab 4. If you print this view, it will print it with the grouping applied also:

Event Report: Line 1 - last 24 hours SHIFTCONNECTOR® io

	Event Start	Functional Location	Category	Description	Attachment	Priority	
	Wed, 05-23-2018 01:38 PM	Tank 4788	Auto-Event for Directives	Info from Line 1: "Observation about the color of the product." Status Overdue to Done: Important hint:	No	Normal	
	Wed, 05-23-2018 01:37 PM	Tank 4788	Auto-Event for Directives	Info from Line 1: "Tank 4788 LSH is bridged, check filling level ever..." Status Overdue to Done: 54r	No	Normal	
	Wed, 05-23-2018 03:31 PM	Line 1	Failure - Break Down	Round trip completed, nothing special	No	Morning Meeting	

Figure 5.5.2-3: Example printed list.

5.5.3 Filtering

Sometimes you might only want to see a subset of the list presented to you, or maybe you only want to print some of the entries. To do this, you can use the pre-defined filters and adapt them to your needs (if needed). Open the template definition by clicking the little arrow button shown at 1:

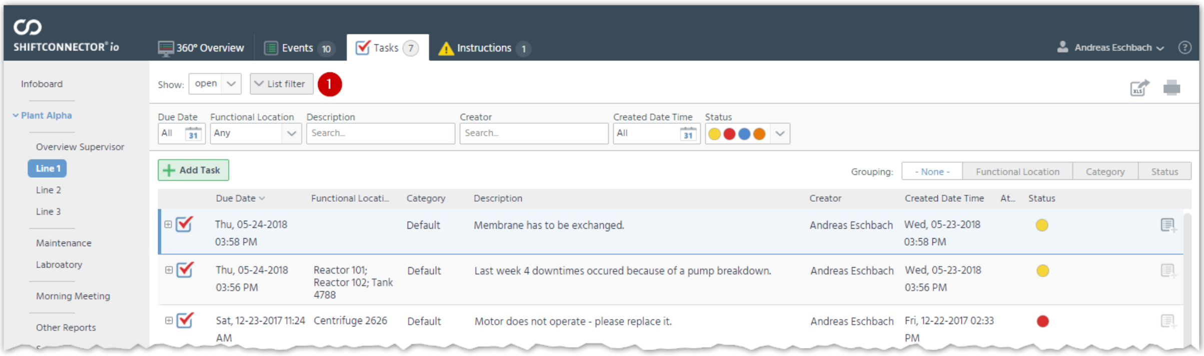


Figure 5.5.3-1: Open Filter.

The fields which appear are the pre-defined filters as configured by your administrator. You can change their contents:

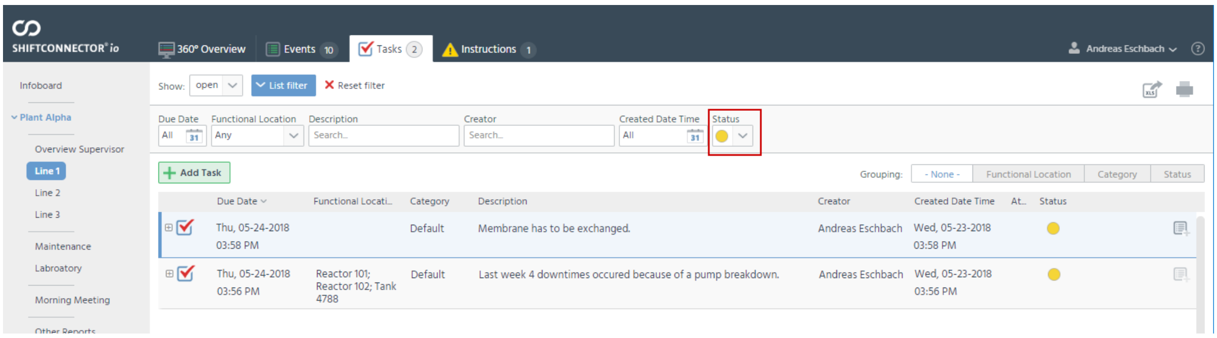


Figure 5.5.3-2: Change Filter.

Only a subset of data is now shown. On prints, this is the only data displayed also:

Task Report: Line 1 - open

SHIFTCONNECTOR® io

	Due Date	Functional Location	Category	Description	Creator	Created Date Time	Attachment	Status	
- Empty Value - (1)									
☑	Thu, 05-24-2018 03:58 PM		Default	Membrane has to be exchanged.	Andreas Eschbach	Wed, 05-23-2018 03:58 PM	No	Open	🟡
Centrifuge 2626 (1)									
☑	Sat, 12-23-2017 11:24 AM	Centrifuge 2626	Default	Motor does not operate - please replace it.	Andreas Eschbach	Fri, 12-22-2017 02:33 PM	No	Overdue	🔴
Line 1 (1)									

Figure 5.5.3-3: Example print of filtered list.

If you want to reset the filter, just click on the *Reset filter* button, which has appeared:

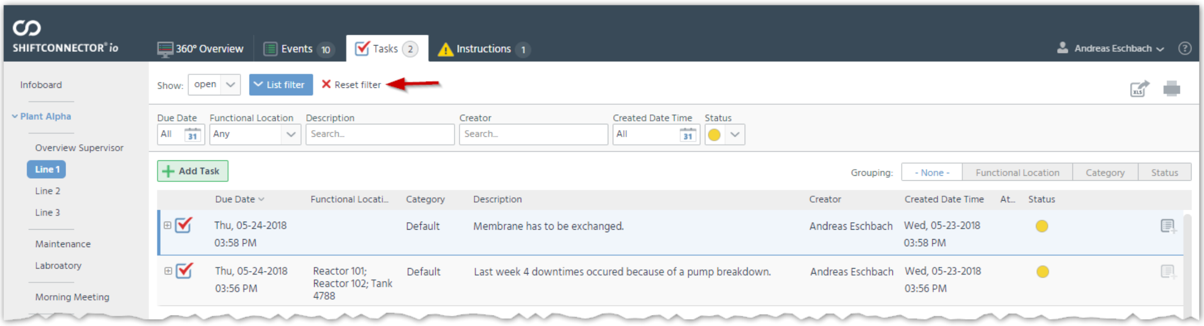


Figure 5.5.3-4: Reset filter.

Remember that you also can change the filter settings through selection of one of the other pre-defined list templates:

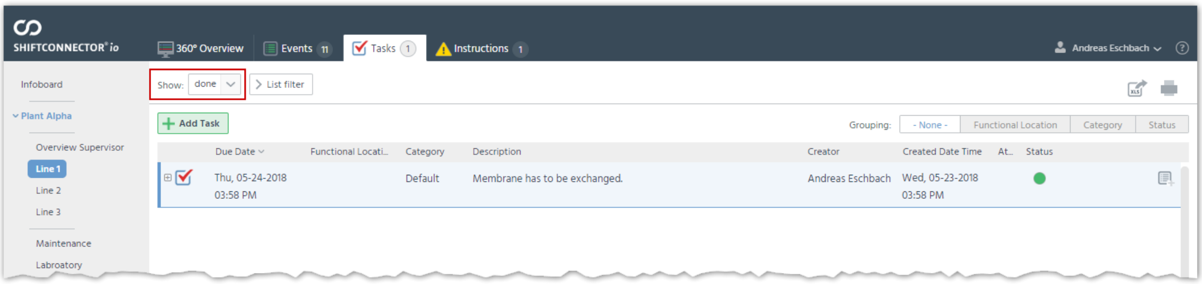


Figure 5.5.3-5: Change filter through different selection for the list template.

5.6 The Infoboard

There are always important things you might want to communicate to your colleagues, or your colleagues to you. Shiftconnector® io contains Infoboard functionality to help you with this.

If your administrator has provided an Infoboard he will have done so either on plant or on workplace level.

All items posted on the Infoboard have a mandatory start and end date, so the information stays fresh and current.

There is however an option for you to look at inactive items, i.e. items with past or future valid dates.

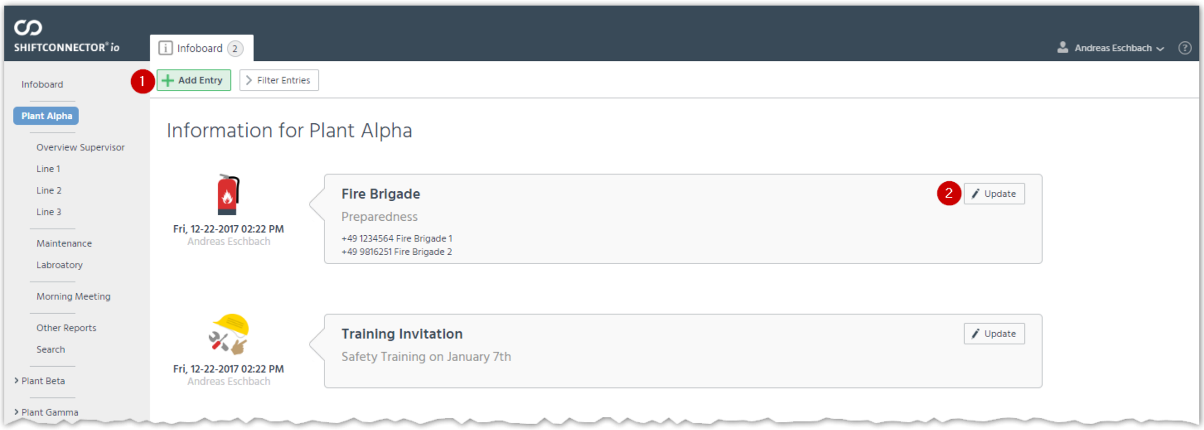


Figure 5.6-1: The Infoboard.

5.6.1 Creating an Infoboard entry

If you have been given authority to do so, you can add an entry to the Infoboard yourself.

Just click the Eintrag hinzufügen button (see 1 Figure 5.6-1 above) from the Infoboard page. This will open the entry form:

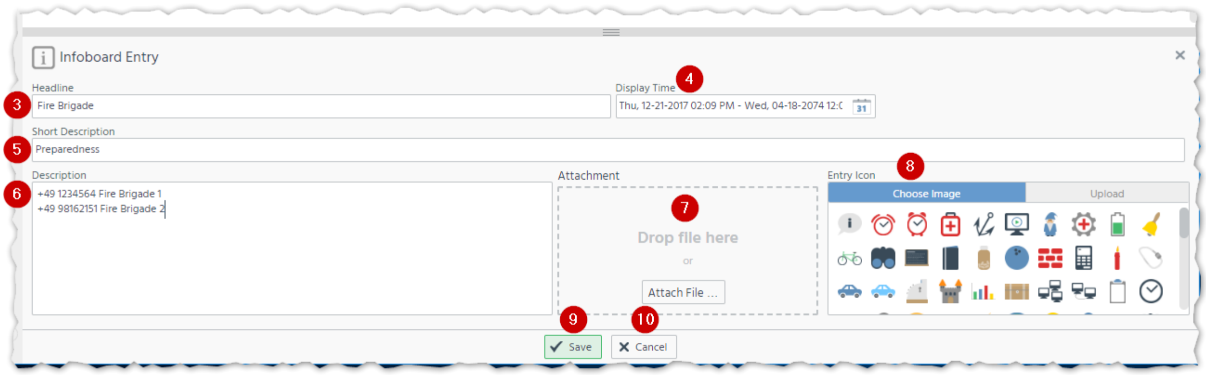


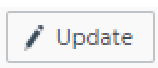
Figure 5.6.1-1: Create an Infoboard entry.

#	Name	Description
3	Headline	The main title for the Infoboard entry is mandatory.

4	Valid from- to dates	Both the valid from date as well as the valid to date is mandatory. You cannot create an open-ended entry. The valid from date is defaulted to now.
5	Short description	You have to enter here a summary description of the info.
6	Detail Description	You can enter a longer description of the info.
7	Attachment	Here you can upload or link a file or folder in the same fashion as described in *07* Attachments.
8	Image chooser	If you want to choose an image to highlight your entry, you can choose one from the provided bucket, or upload your own!
9	Save	Save your entry.
10	Cancel	Discard your entry.

Figure 5.6.1-2: The entry after saving.

5.6.2 Updating an Infoboard entry

To update an entry, click the 

button on the entry you want to change (see 2 Figure 5.6-1 above), and proceed in the same way as if you were creating a new one.

5.6.3 Deleting an Infoboard entry

Once you have created an Infoboard entry, you cannot physically delete it again. If, however, you want to remove it from the active view, you could change the valid to date to a date in the past which will make the item inactive.

6 Special components and functions

6.1 Confirmation dialog

- On closing a screen, a *Yes / No* dialog will be displayed if you have made changes, asking if you want to discard the changes or not.
- There is no dialog if you have made no changes.

6.2 Notifications

Generally, you as a user should always be informed about changes in your line and always have the newest information to hand.

A combination of functions aids to always deliver the most current data, without interrupting you in your work:

- Automatic refresh of the lists (see also *6.3 Auto Refresh*)
- Refresh button
- Notifications about new and changed entries

An administrator can activate or de-activate the function. In general, if it is active, the following rule applies:

You only receive a notification if another user creates or updates an entry within the same line you are currently working in. Additionally, you receive a notification if e.g. you yourself create an entry for Line 4 while you are located in Line 5:

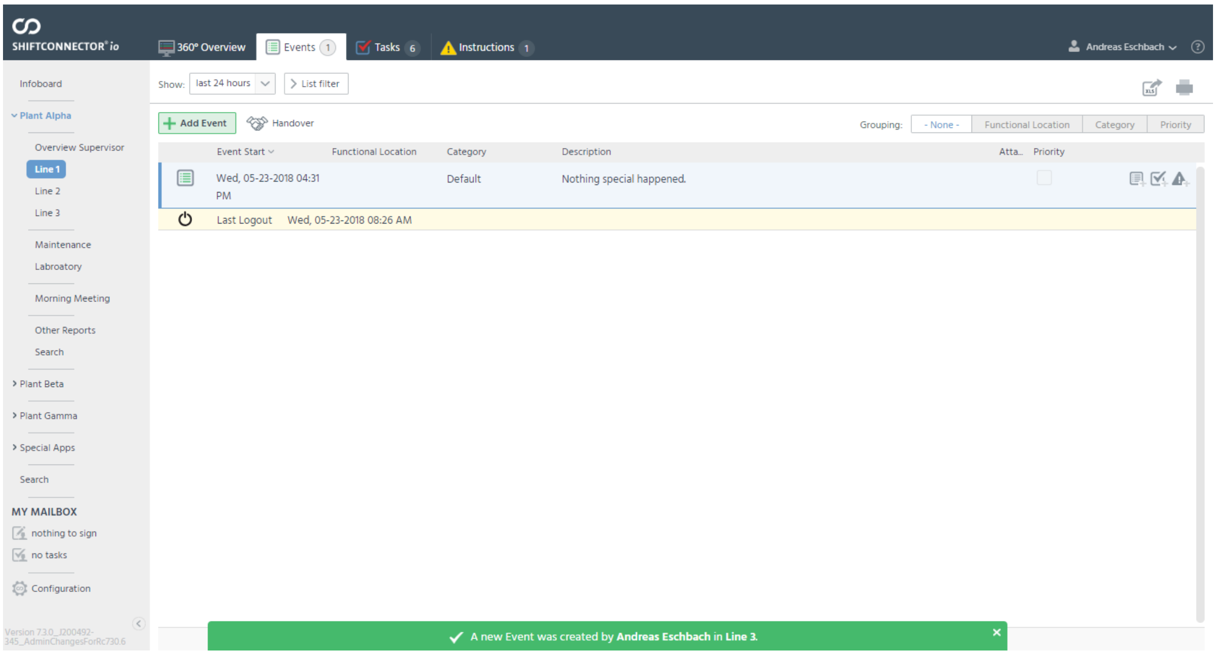


Figure 6.2-1: Notifications.

The green notification disappears automatically after a few seconds. You can though close it yourself early by clicking on the cross in the right-hand side top corner.

If you are however interested in the new or changed entry, you can open it by clicking on the notification.

6.3 Auto Refresh

- All data refreshes at a certain interval, so changes made by your colleagues become available to you, and vice versa.
- The interval is configurable by an administrator and could be set e.g. to 120 seconds.

6.4 Component: Text modules with auto-complete

Text modules are available for events, tasks and instructions. There is an optional auto-complete function as well as configurable text templates. Both features can be used concurrently.

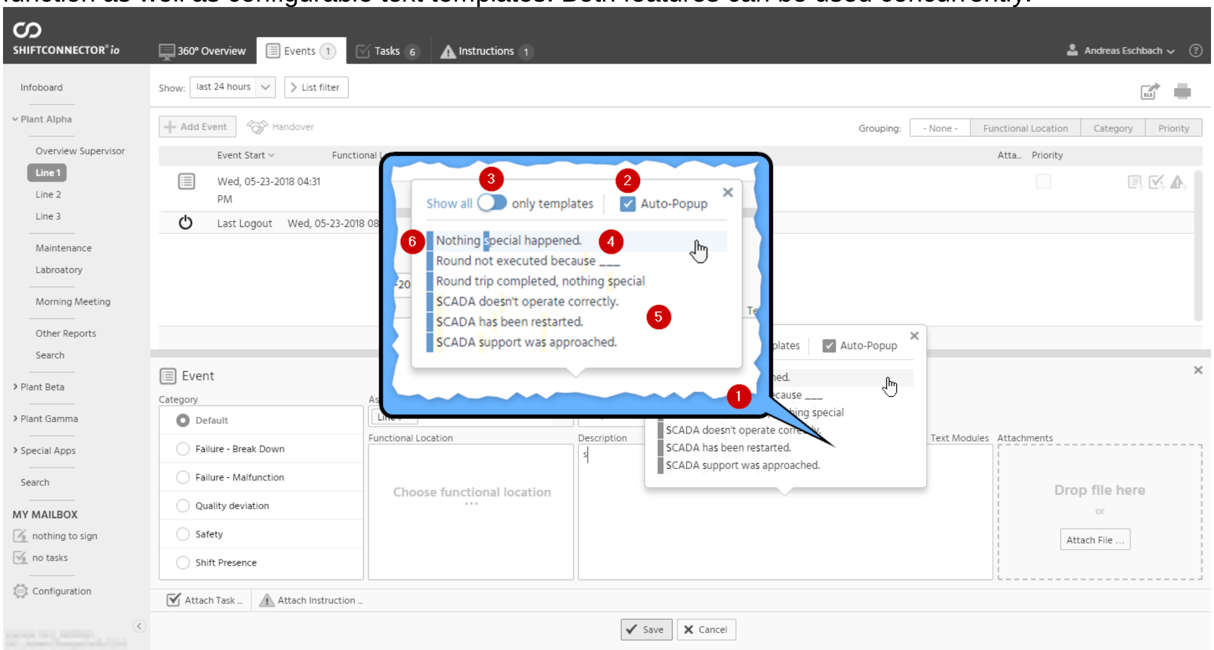
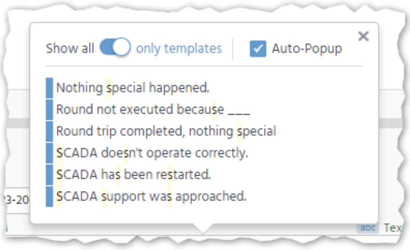


Figure 6.4-1: Popup Text modules.

#	Name	Description
1	Text modules	The functionality gets triggered either by clicking the "*Text module*" button above the description field, or, as is shown here, automatically on entering text (see 2).
2	Auto-Popup	When this tick box is checked, the selection popup automatically opens when you start entering text, filtered by what you are entering.
3	Template filter	Here you can set if you only want to see templates which have been configured by an administrator or also suggestions from previously

		entered descriptions. If you toggle the switch, the display gets reduced to the templates: 
4	Templates	These are templates
5	Suggestions	These are „learned" suggestions
6	Selection	By clicking on an entry in the list it will be copied into the description field.

6.5 Component: Functional Location

Depending on how your administrator has configured the functional location entry field you will be presented with one of two choices:

a) Functional location has to be entered in a standard text field
b) Functional location can be selected from a combo box. Activate the functional location chooser by clicking the functional location field on the Detailview:

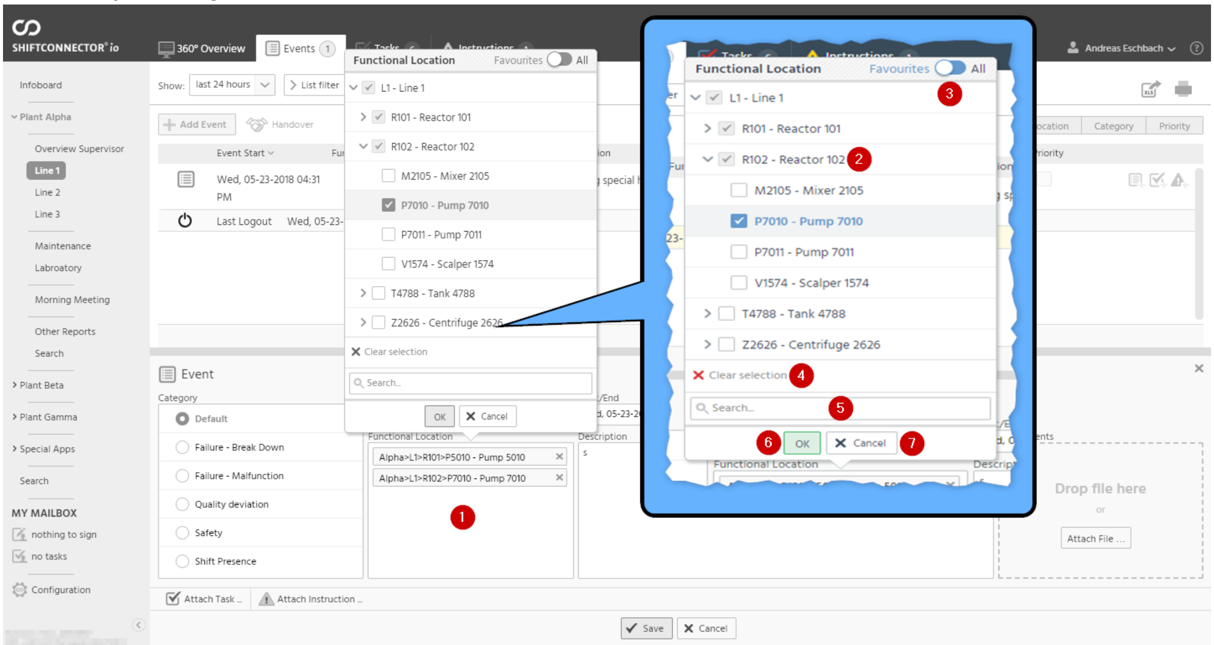


Figure 6.5-1: Popup Functional locations.

#	Name	Description
1	Functional Location Field	When you click this, the popup opens.

2	Functional Location List	The list of locations for your choice. The configuration determines if you can select only one or more functional location. This can vary from entry form to entry form.
3	Favorites switch	This switch is shown if your administrator has defined favorite functional locations for your work place. On opening the popup, any favorites are first shown. By toggling you can display the entire list.
4	Clear selection	This will clear all previously selected choices.
5	Search	If you type in text in this entry field, all functional locations containing this text will be filtered out for you.
6	Ok	Saves the selection.
7	Cancel	Cancels the changes to the selection.

6.6 Status Change Comment

You get prompted to confirm a status change for task and instruction with a comment. This change will trigger the creation of a new event which is written into the shift book of the work place of the root node of the task or instruction:

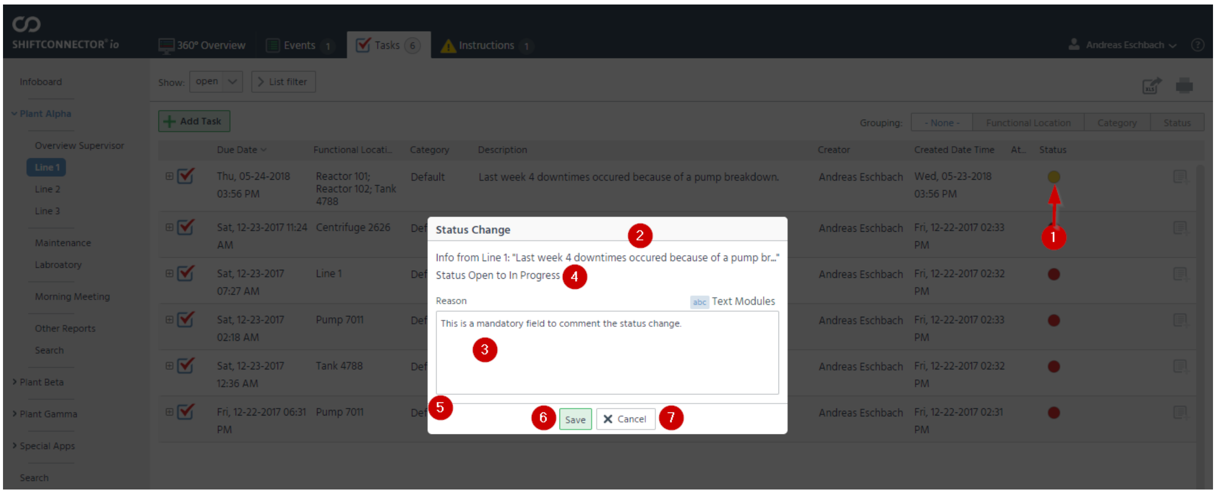


Figure 6.6-1: Popup Status change.

#	Name	Description
1	Status combo box	If you have the authority, this is where you can change the status of a task or instruction. When you do so, the comment box pops up.
2	Change text	Auto generated by the system. This will be written into the auto-generated event together with the change reason you enter: Info from [*your work place*] Status [*current status*] to [*new status*]: [*the reason you entered*]

3	Reason	Mandatory text field used in the description of generated event. See above.
4	Auto-Event	If configured by your administrator, you can choose to create the auto-event resulting in this status change with a priority of "Low"
5	Priority / Status change for linked items	If configured by your administrator, you get a list of items linked to the entry you are working on and choose to change their status too.
6	Save	Saves the changes and closes the popup.
7	Cancel	Closes the popup, discarding any entry and abandons the status change process.

6.7 Attachments

You might want to add some additional information to the data you enter by adding an attachment. You can do this both on creation or update of events, tasks and instructions if the form has been configured with the function:

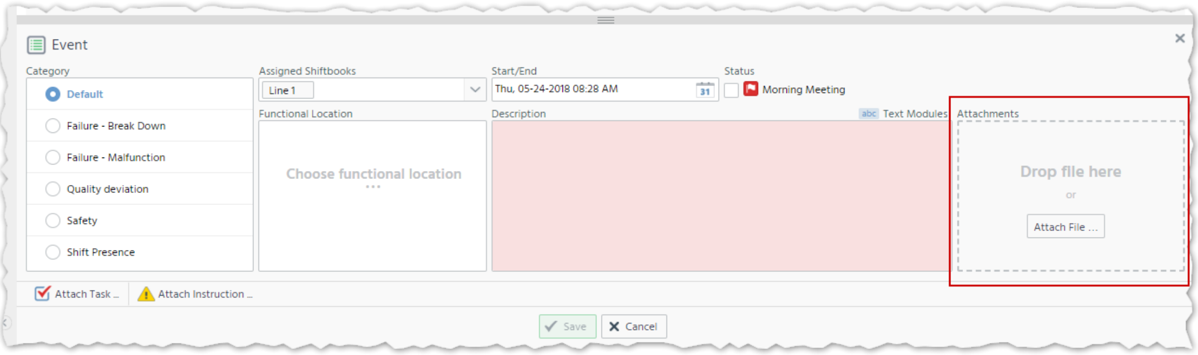


Figure 6.7-1: Attachment component.

Now you have multiple options:

1. Drag the attachment(s) directly from explorer in the field *Drop files here*:

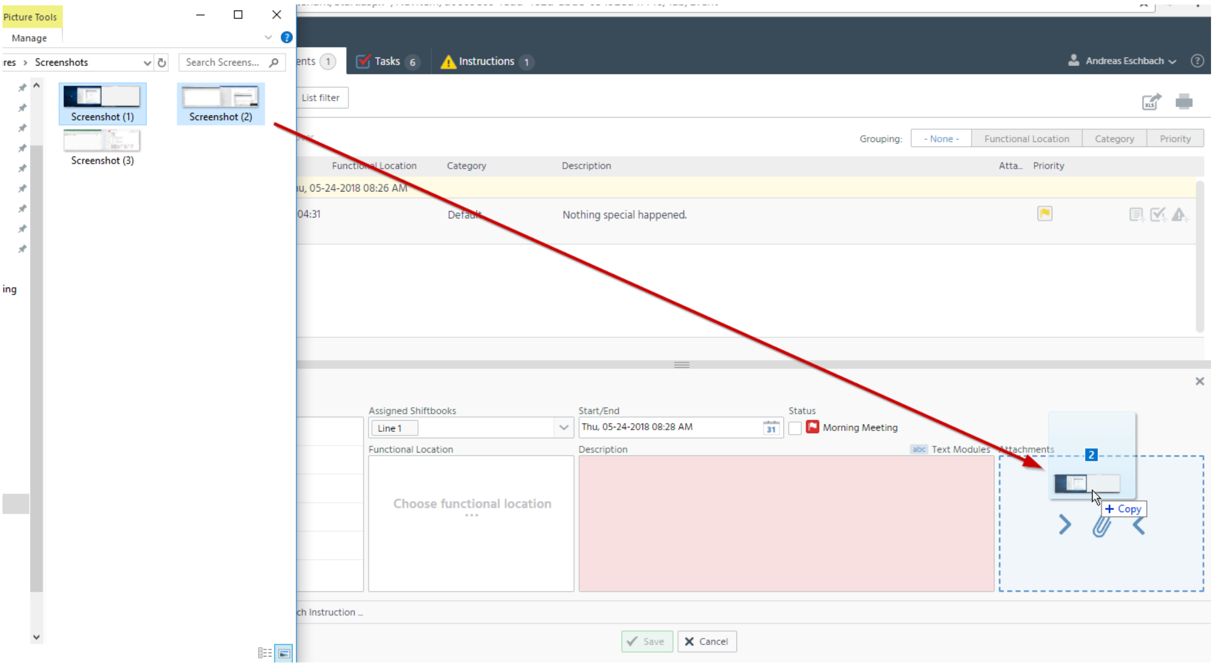


Figure 6.7-2: Drag-and-Drop the attachment(s).

2. You click on the field *Drop files here* to open the explorer where you can choose the file(s):

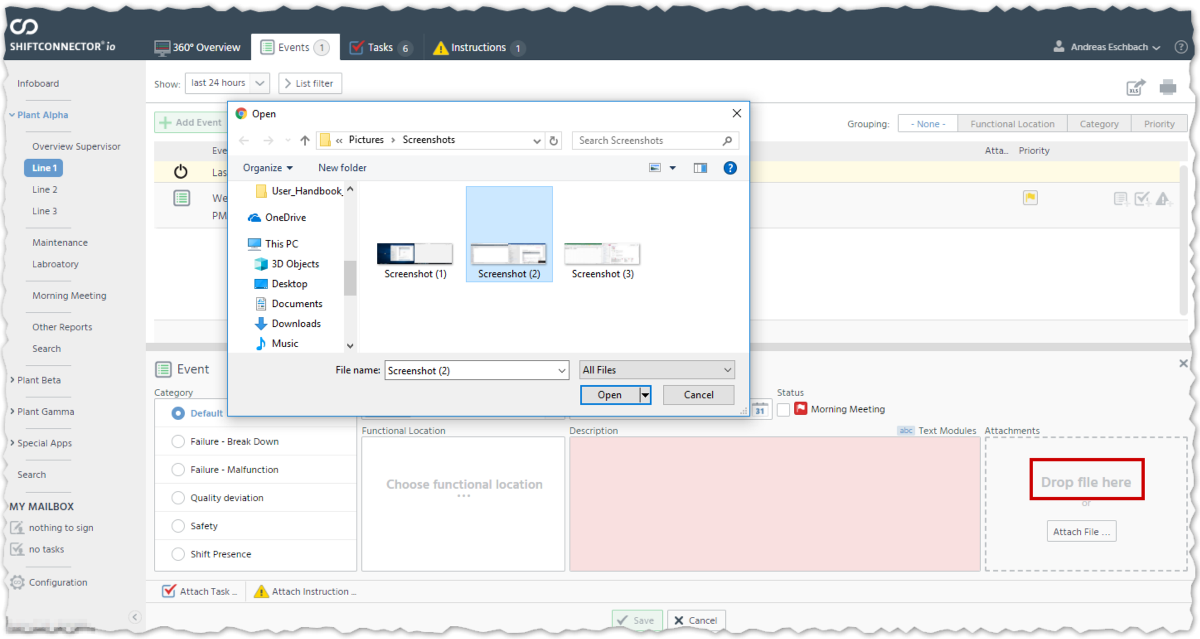


Figure 6.7-3: Select attachment(s).

3. You click on the *Add file* button to be offered further selection options:

a. You can attach a screenshot you have in the clipboard using Ctrl-V.
b. You can link to folders or files. However, remember that for links it needs to be a path which is accessible for other users i.e. a network path for them to be able to access it.

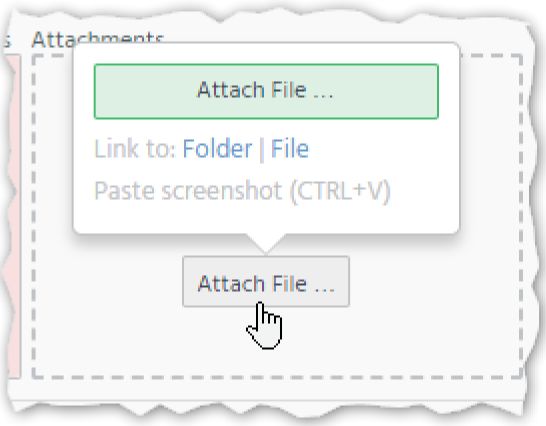


Figure 6.7-4: Options for adding attachments(s).

After attaching:

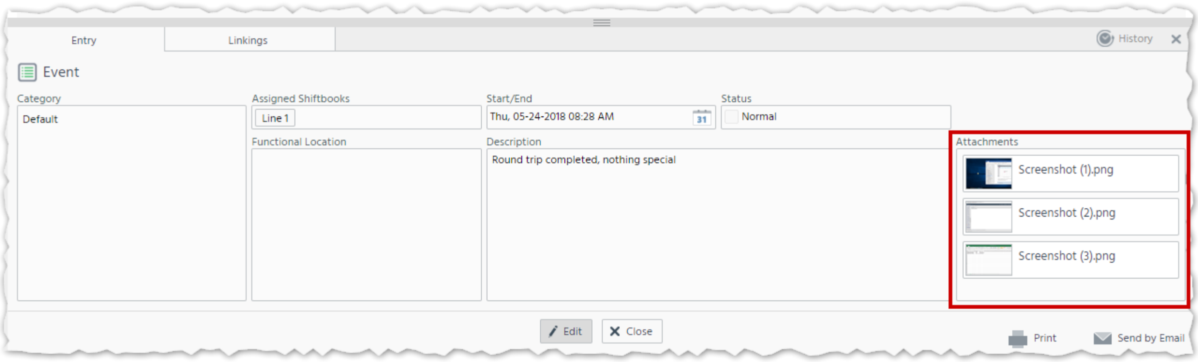


Figure 6.9-5: Attachment in the component.

To download the document, just click the entry in the attachment control. To view the attached images, click on one of them to open the Image Viewer:

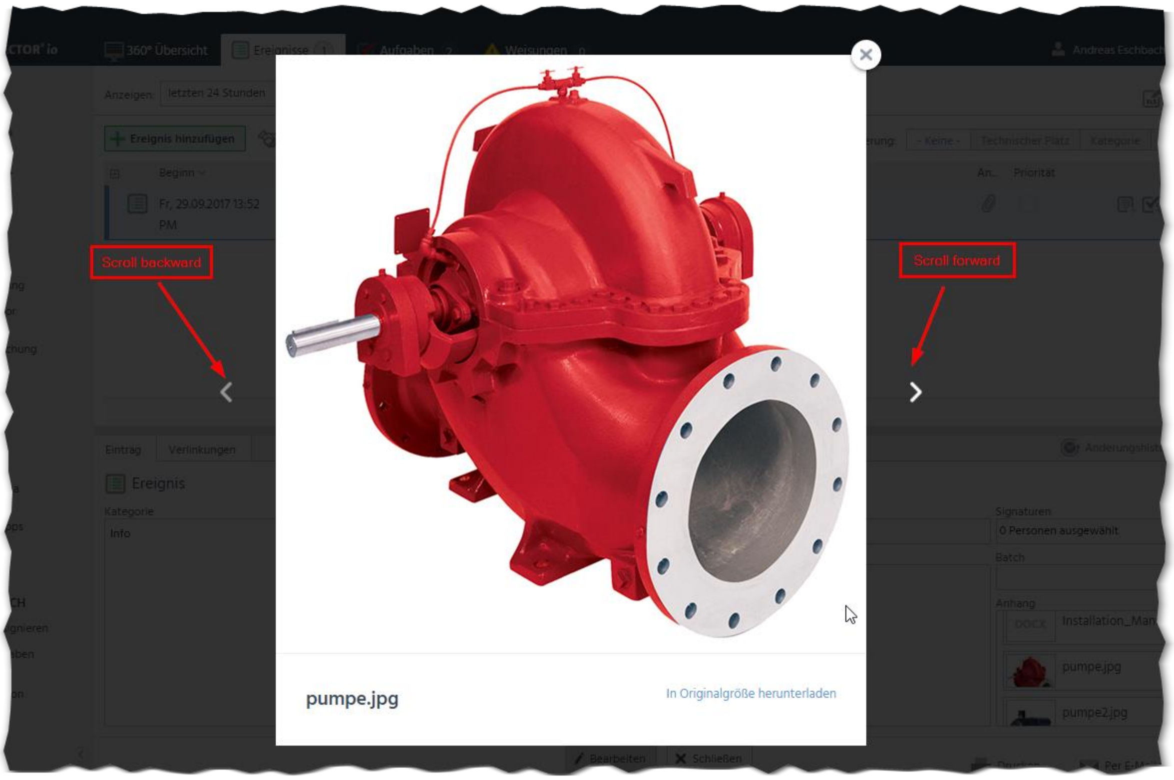


Figure 6.7-6: Image Viewer.

With the link at the bottom right-hand corner you can download the image in its original size.

If you are authorized to add or update Infoboard items, you will also be able to add attachments there. This is particularly helpful to distribute manuals like the one you are currently reading, new legislation information or other material which is of importance for Shiftconnector® io users.

Figure 6.7-7: Attachment on the Infoboard entry.

6.7.1 Attachment types

You have the option to

- upload one or more file(s)
- link to one or more file(s)
- link to one or more folder(s)

or a combination of the above.

6.7.2 Possible file types

The types will have been configured by your administrator.

Example of file types which can be attached:

- PDF
- Word Document
- Power Point slides
- Excel Document
- JPG
- GIF
- PNG

If you try to attach a file with a type that is not configured, you will get an error message. If you think you should be able to attach a file with the type in question, speak to your administrator.

6.7.3 Maximum file size

On upload the file size is checked. If the size is more than the defined value an error message occurs. This value is defined in configuration by your administrator. Speak to your administrator if you think you should be able to upload the file.

6.7.4 Changing file content

Once uploaded, the files are write-protected when opened. That means if you or someone else wants to change a file it needs to be deleted and re-uploaded.

6.8 Interlinked records

Most entries will have links to other entries. You can have standalone events but a task or instruction will always be linked to minimum one event.

In the lists you can identify a record with interlinked entries by the plus-Symbol in front of the row:

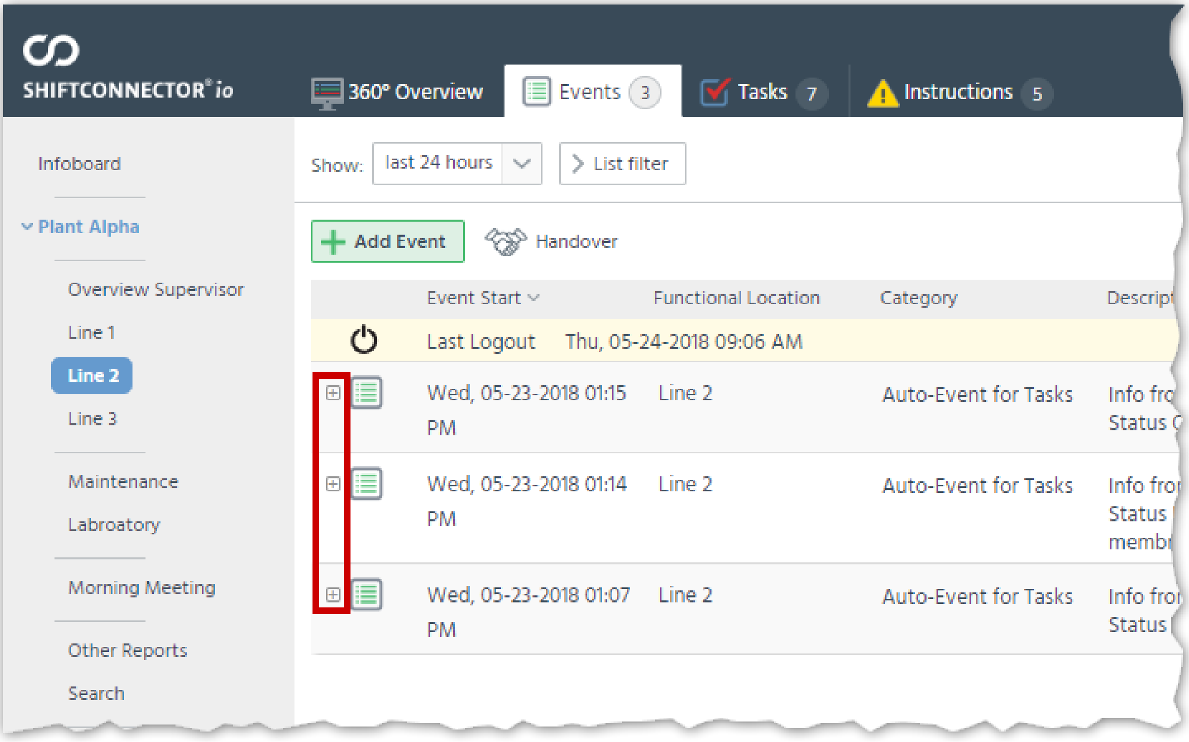


Figure 6.8-1: Representation of linked records.

You can expand the tree by clicking on this symbol:

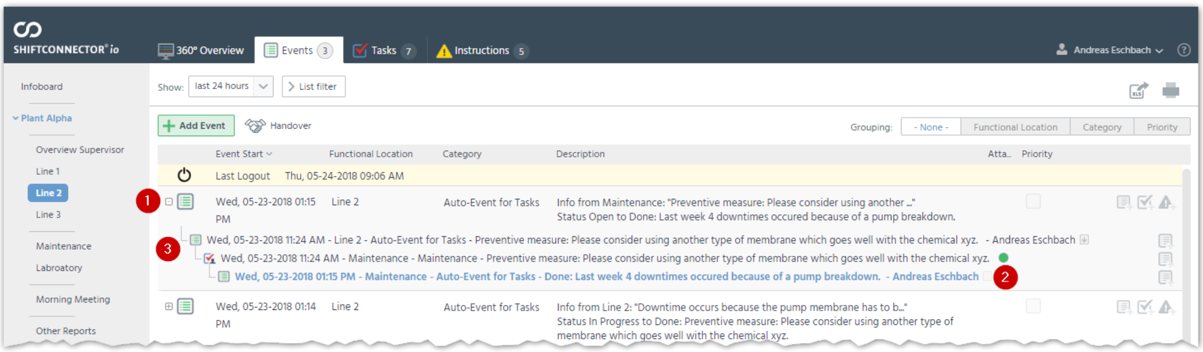


Figure 6.8-2: Linked records expanded.

#	Name	Description

1	Expanded tree	Interlinked records are depicted either as a tree or a flat list. Your administrator has pre-configured this. In the example you see the tree.
2	Root entry	The entry next to where you clicked the Plus-Symbol will be displayed again in blue for your orientation.
3	Linked entries	The related records are shown here to you as a tree.

In case you want to expand multiple trees at the same time, you can set this in the user settings:

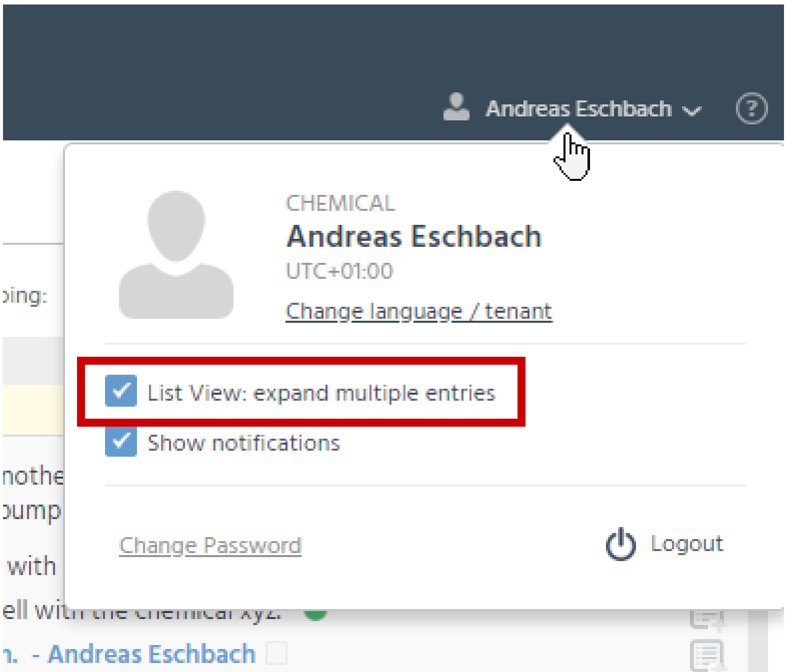


Figure 6.8-4: Linked records expanded.

If this option is selected, you can expand more than one tree at once by either clicking on each tree's plus-symbol or by using the global plus-symbol to expand all trees in the list.

If the option is de-selected you can only expand one tree at the time: if one is expanded and you click on the plus-symbol of another one, the first one will collapse when the second one opens.

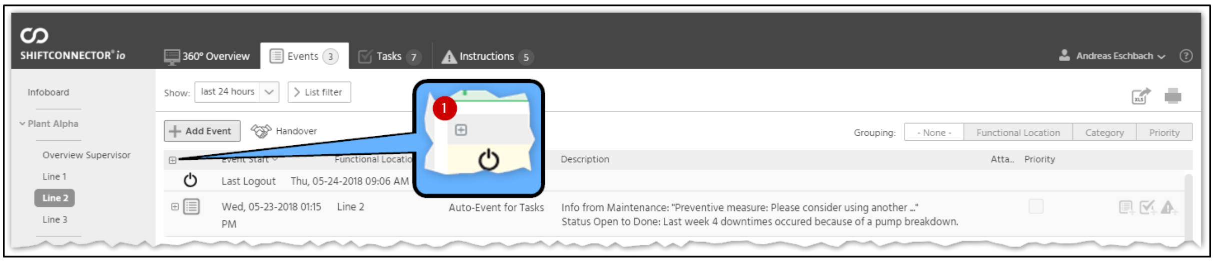


Figure 6.8-5: Collapsed list.

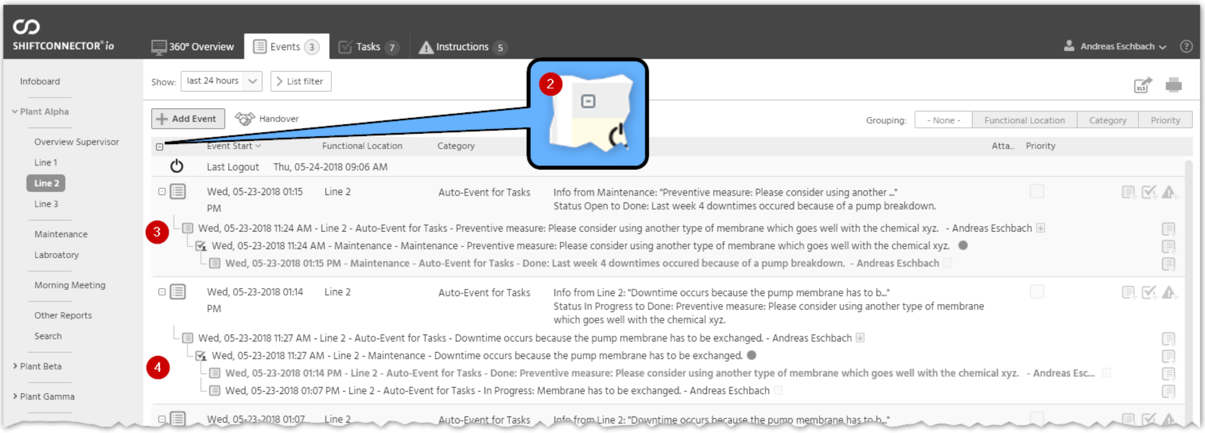


Figure 6.8-6: Expanded list.

#	Name	Description
1	Expand	After you changed the option to expand multiple entries, a plus-symbol appears in the top left-hand corner of your list.
2	Collapse	After clicking on the plus-symbol the list expands all entries and the symbol changes to a minus-symbol. To collapse all records simply click on this.
3-5	Expanded trees	After clicking the expand symbol, all trees are expanded.

6.9 Assigned Shiftbook(s)

When you are adding events, tasks and instructions they get by default assigned to the Shiftbook of the workplace you are currently working from.

For events and instructions, it is not possible to de-select this, but it is possible to make an entry into additional workplaces. This is however different for tasks. First of all, it is possible to select another Shiftbook than the original one, and secondly it is only possible to select a single one.

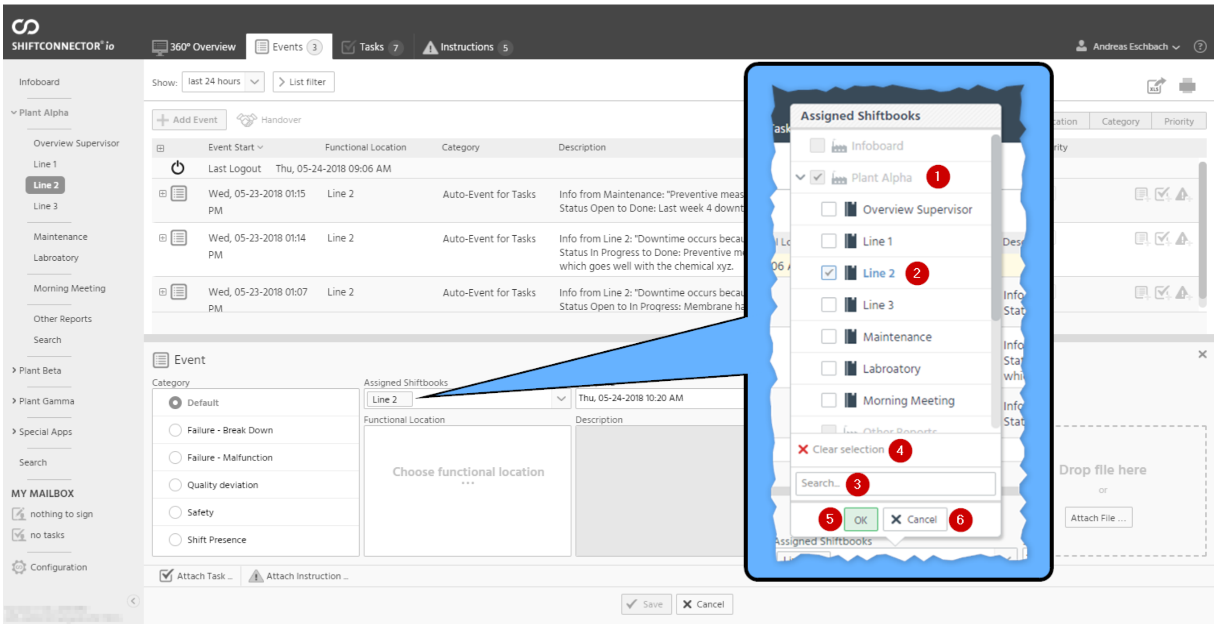


Figure 6.9-1: Assigned shiftbook(s).

#	Name	Description
1	Source Shiftbook	You activate the Shiftbook chooser by clicking on the little book symbol (see red arrow). The organizational hierarchy is displayed to you disabled, with its Shiftbooks enabled. The Shiftbook below the workplace you're working in is selected and disabled as the business rule is such that the entry cannot be moved out with the workplace, for events and instructions. For tasks the source is pre-selected but it can be changed.
2	Additional Shiftbook	Additional Shiftbook entries can be made for events and instructions, only one for tasks.
3	Search	You can search for a Shiftbook, which is useful for large lists.
4	Reset	With this button you can reset the choice you made.
5	Ok	You save your choice by clicking this button
6	Cancel	You discard your changes by clicking this button

6.10 Short List for Tasks and Instructions

If it has been configured by your administrator, you can see a short list of tasks and/or instructions on the right-hand side of your event tab:

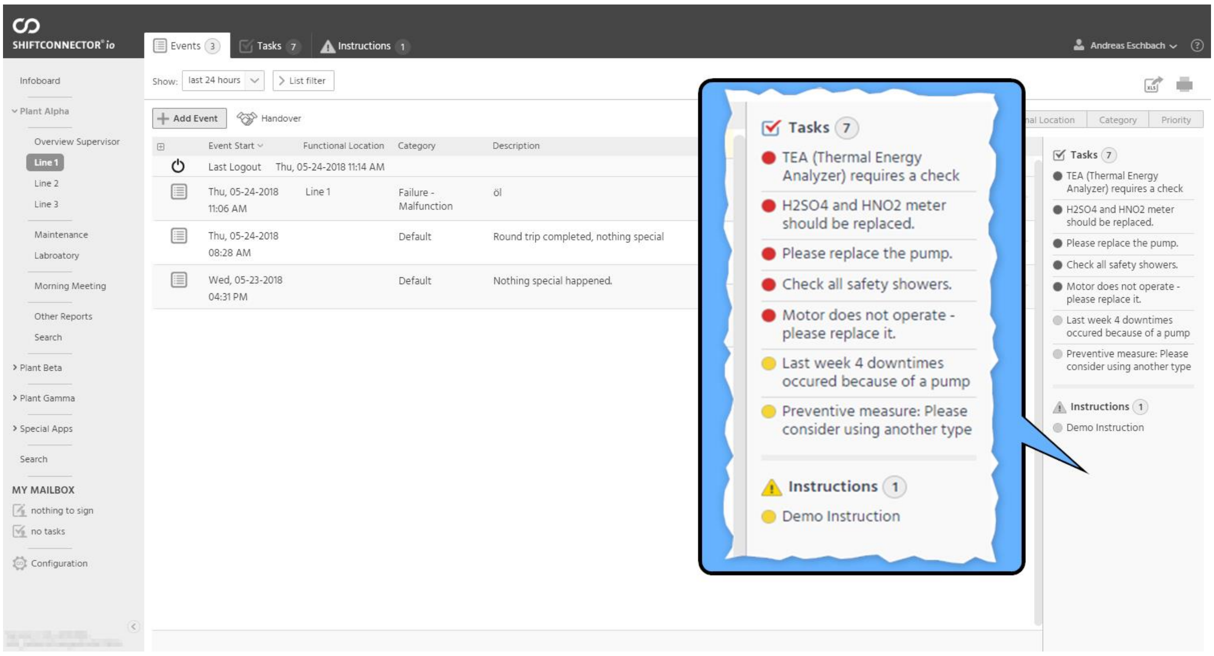


Figure 6.10.1-1: Short List.

#	Name	Description
1	Short List	The Short List will be shown on the right-hand side of the event ab, if it has been configured by your administrator.
2	Tasks	The list of open tasks, sorted by due date ascending.
3	Instructions	The list of instructions, sorted by valid date descending.
4	Entry	When you click on one of the entries, the detail view of this record will open in the event tab.
5	More Tasks / Instructions	Should the list be longer than configured, this hyperlink will be shown. When you click on it, the relevant tab with the full list of entries will be opened.

6.11 Change history

All changes to info boards, events, task and instructions are recorded and accessible via the application. This includes changes to the linking of the records also.

6.11.1 Data changes

The historic changes to data of a detail record are shown to you in this way:

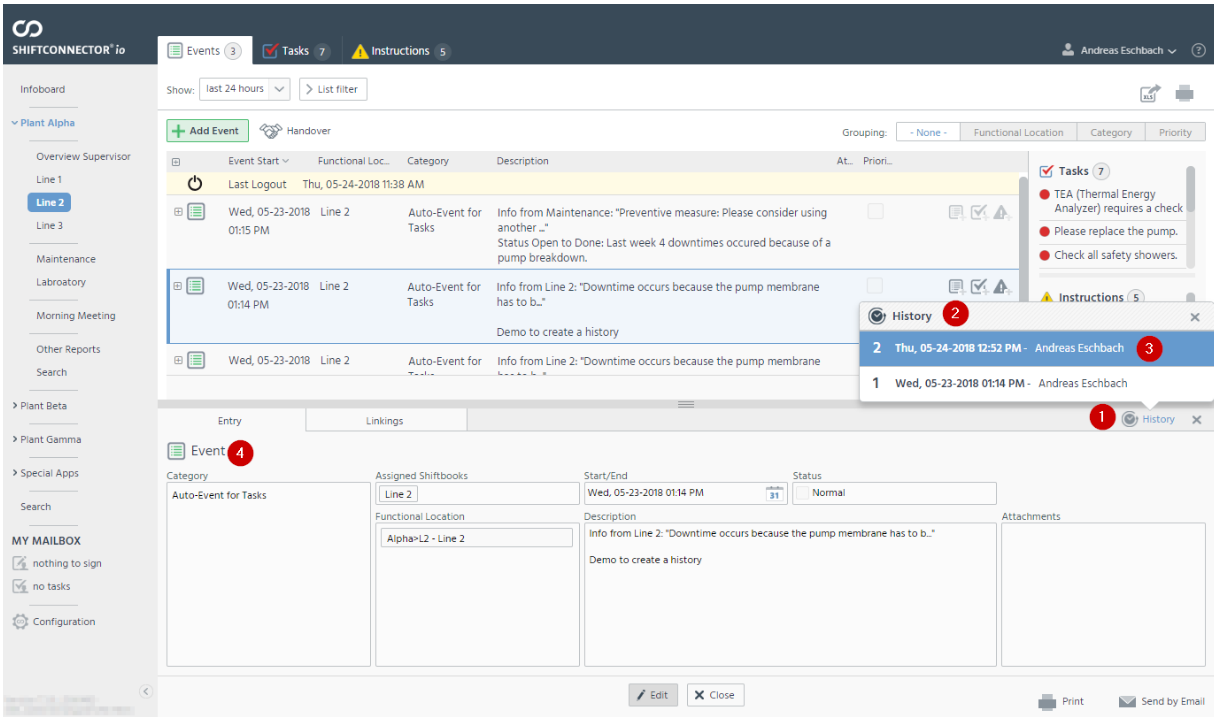


Figure 6.11-1: Change history - List.

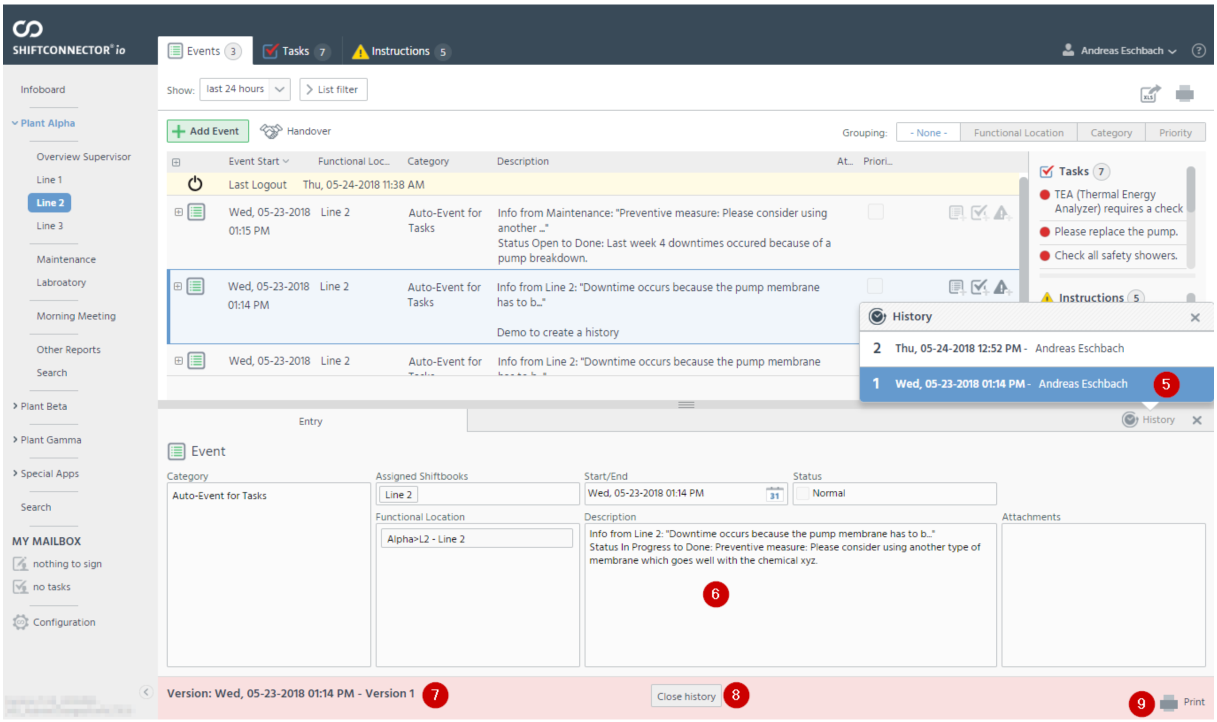


Figure 6.11-2: Change history - Detail.

#	Name	Description
1	Change History	From the Detailview of the record you want to check on history data for, click the button *Change History*.

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2	Change History List	You are presented with a list of all versions the record ever had.
3	Versions	Version 1 is the original record, the version at the top of the list being the current version.
4	Detail view	This is the current record.
5	History detail view	Click on a historic version to open the detail view of it.
6	Detail view	Now the historic record is shown to you.
7	Info	Here you see when this version was created.
8	Close history	Click on this button to close the history and display the current version.
9	Export	Like for current records you can print and email the historic versions.

6.11.2 Linking history

This feature is only available if your administrator has configured to be keeping a history of the links. Else you will always only see the current linking.

Click on the Linking history tab on the detail view:

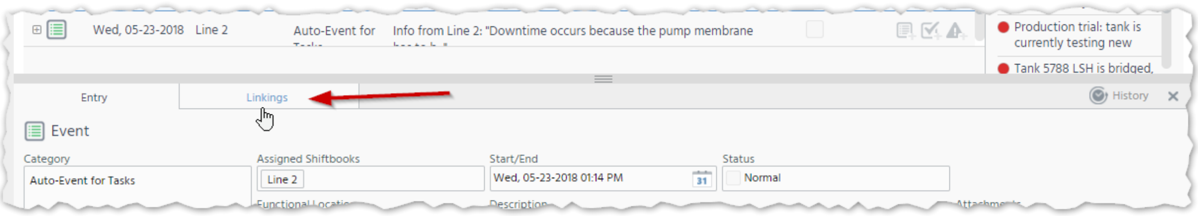


Figure 6.11.2-1: Linking history - Tab.

This will open the linking history:

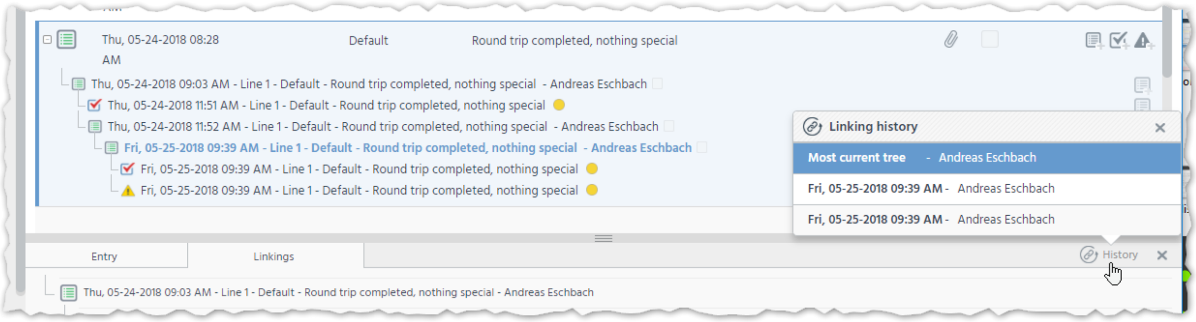


Figure 6.11.2-2: Linking history - List.

As with the change history, you can move through the various versions by selecting them in the popup on the right-hand side of the detail view:

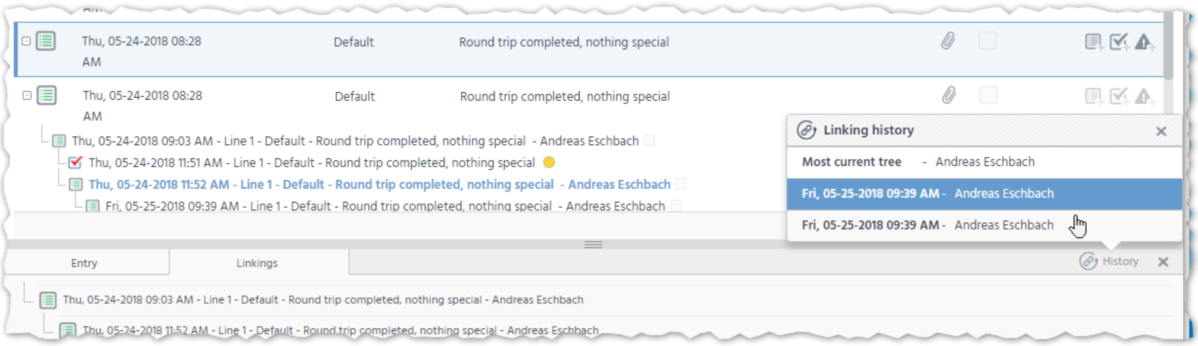


Figure 6.11.2-3: Linking history - Detail.

6.12 Export functions

If you want to export the lists of entries or the detail of an entry, you can do this by using the offered export functions to PD, Excel or Email.

For the PDF export, provided templates are used which means that potentially not all data visible on the screen is printed.

If however you are using the Excel export, all data is exported and by using Excel, it will be possible for you to update the file. The Excel files contain no meta data.

Excel export is not available for detail records, but you have the option to email the details

6.12.1 PDF export for lists

On screens where you see the little printer icon you can export your data to PDF by clicking it.

This is currently possible for event, task and instruction lists as well as signature lists.

The standard PDF file contains following attributes:

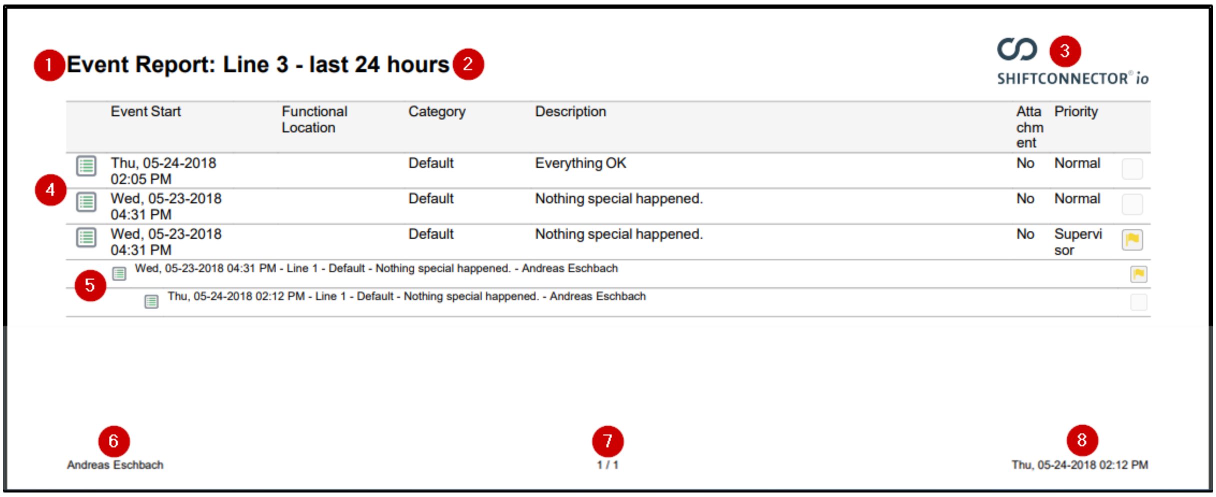


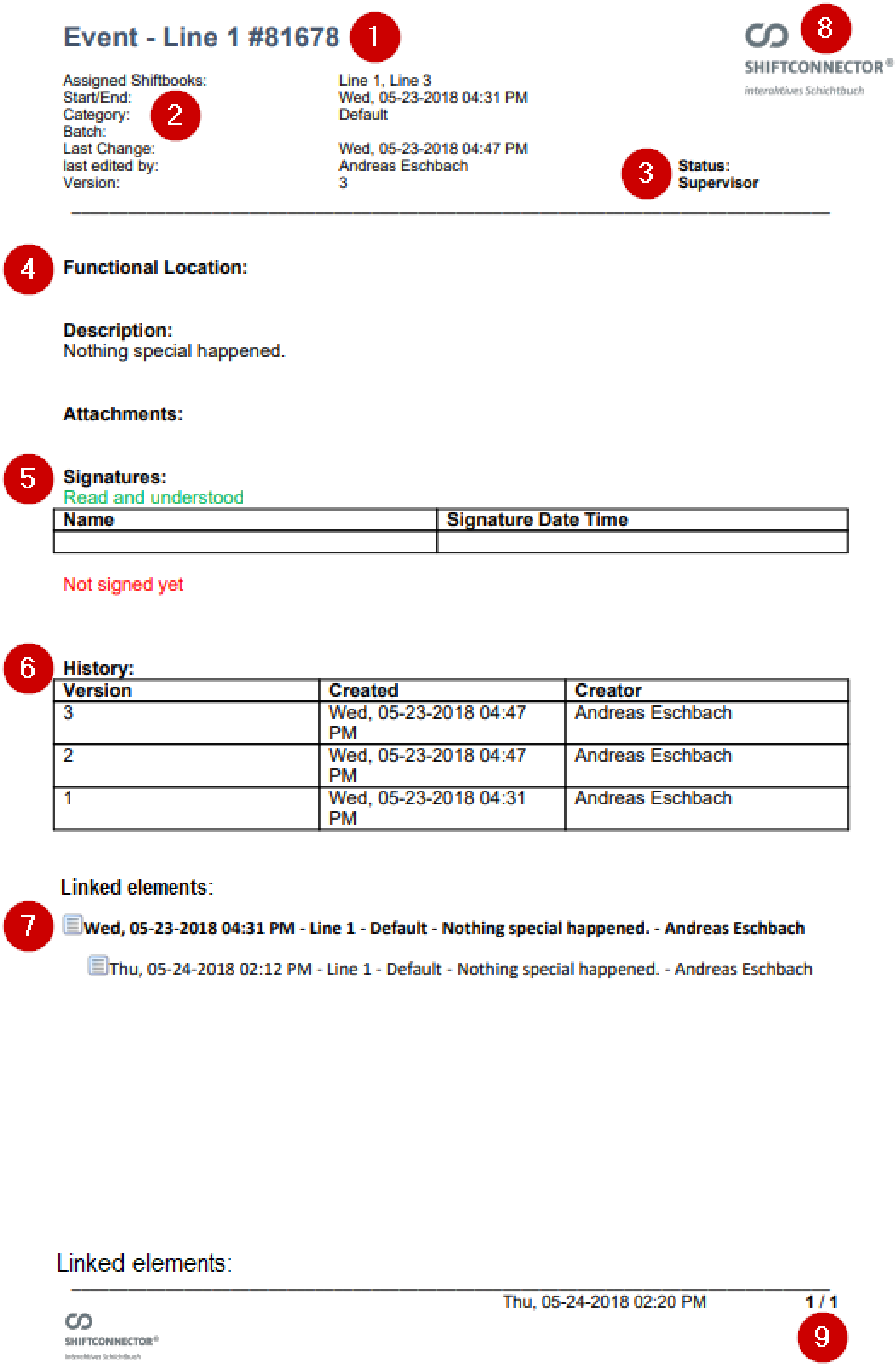
Figure 6.12.1-1: PDF Export of lists.

#	Name	Description
1	Report title	The title as it is defined in the report template
2	Name of list template	The list template you chose before clicking the print button
3	Logo	The logo provided by your company
4	The list	The record list as it was displayed before clicking the print button
5	Trees	If you opened any trees before clicking print, the data of those trees will be displayed also
6	Name of creator of the pdf	This would be your name
7	Page x of y	How many pages are there
8	Date and Time	Creation Time Info

6.12.2 PDF export for detail screens

Following screens will offer a print function for detail views:

- Detail View Event
- Detail View Task
- Detail View Instruction
- Detail View Signature



Event - Line 1 #81678

SHIFTCONNECTOR®
interaktives Schichtbuch

Assigned Shiftbooks:	Line 1, Line 3
Start/End:	Wed, 05-23-2018 04:31 PM
Category:	Default
Batch:	
Last Change:	Wed, 05-23-2018 04:47 PM
last edited by:	Andreas Eschbach
Version:	3

Status:
Supervisor

Functional Location:

Description:
Nothing special happened.

Attachments:

Signatures:
Read and understood

Name	Signature Date Time

Not signed yet

History:

Version	Created	Creator
3	Wed, 05-23-2018 04:47 PM	Andreas Eschbach
2	Wed, 05-23-2018 04:47 PM	Andreas Eschbach
1	Wed, 05-23-2018 04:31 PM	Andreas Eschbach

Linked elements:

Wed, 05-23-2018 04:31 PM - Line 1 - Default - Nothing special happened. - Andreas Eschbach

Thu, 05-24-2018 02:12 PM - Line 1 - Default - Nothing special happened. - Andreas Eschbach

Linked elements:

Thu, 05-24-2018 02:20 PM **1 / 1**

SHIFTCONNECTOR®

Figure 6.12.2-1: PDF Export Detailview.

#	Name	Description
1	Report title	The title as it is defined in the report template together with the workplace name and entry number
2	Entry details	Detail data as it is defined on the report template
3	Status	The status of the record
4	Entry details	More details describing the printed record
5	Signature list	Any provided and still due signatures are printed here
6	History list	A list of historic versions with creation info
7	Links list	A list of the record and its links
8	Logo	The logo provided by your company
9	Footer	Footer info of creation date and time and page info

6.12.3 Excel export of lists

All list screens with an Excel symbol  have the ability to generate an Excel file (MS Excel 2010) dynamically. This is provided for you for event, task, instruction and signature lists.

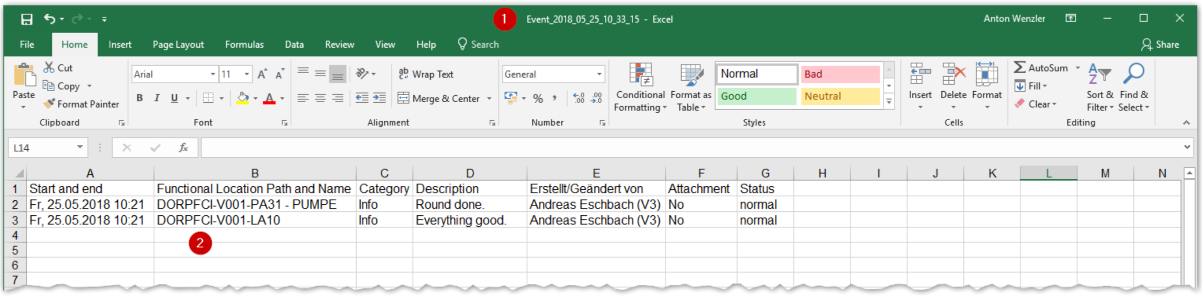


Figure 6.12.3-1: Excel Export Lists.

#	Name	Description
1	Export name	The name is constructed from the type of the list (e.g. “task” and a timestamp.
2	Record list	A list of all the records you exported in raw form.

6.12.4 Sending a detail record via Email

On all detail view screens with an Email symbol  you can generate an email from your standard Email program, containing all details from the record, including a hyperlink to the record location within Shiftconnector® io.

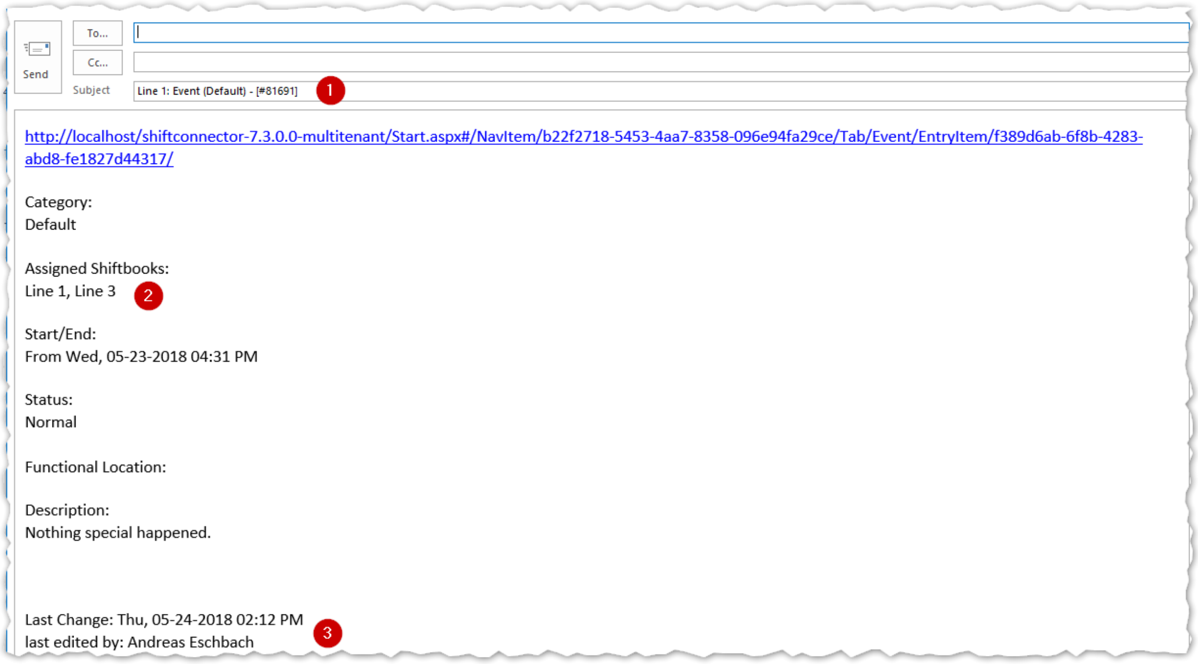


Figure 6.12.4-1: Email of Detailview.

#	Name	Description
1	Subject title	The title contains your workplace, the template name and a record id
2	Hyperlink	Via the hyperlink the receiver can open the record in Shiftconnector® io directly.
3	Detail data	The contents of the record to email
4	Last edited data	Author and date/time of the last edit

6.13 Mouse-over for text

Each row has a mouse-over effect. Hovering over a column in row will show a tooltip if available:

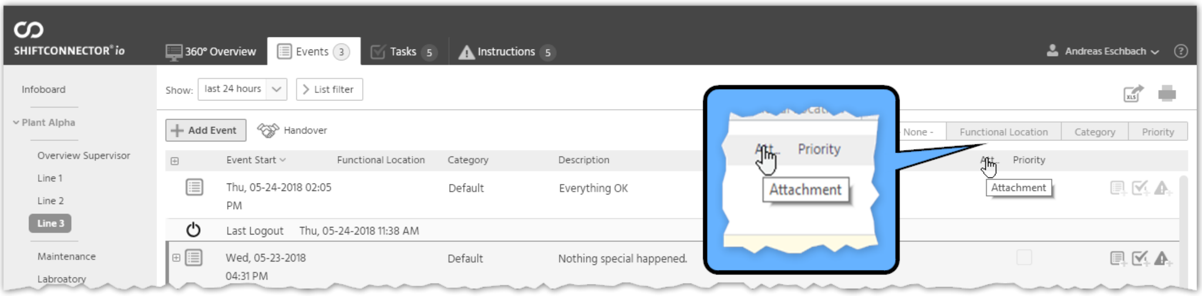


Figure 6.13-1: Mouse-over for text.

Clicking the row will open the detail view.

The user can click anywhere on the row to open the detail view, except the Priority combo box, the attachment icon and the buttons to add an event, task which are all described in *6.14 Mouse-over* .

6.14 Mouse-over for icons

Icons will be explained through mouse-over

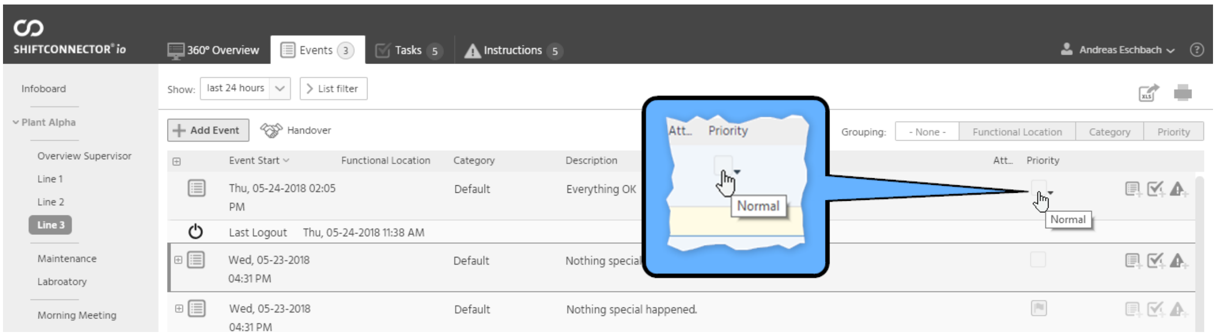
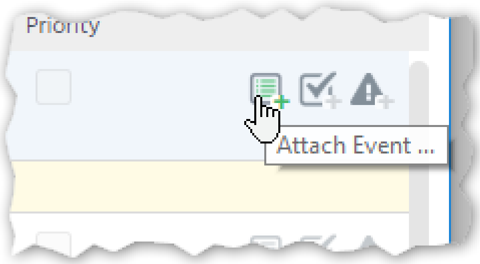
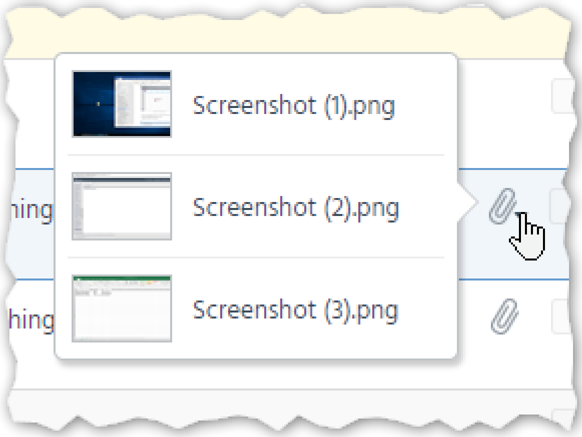


Figure 6.14.-1: Mouse-over for icons.

Some more examples:

Name	Description	
Attach event	When dragging the mouse over this button, you are creating a mouse-over effect - the icon changes its color. The mouse pointer also changes to indicate that the icon is clickable.	
Attachment icon	The mouse-over effect of this icon gets switch-on by clicking on it. It shows the name of the attachment. By clicking the name, you can open the attachment.	

7 The 360° Overview

If your workplace was configured in Shiftconnector® for it, at the relevant location, you will see a 360° Overview which shows you important entries over a specified period:

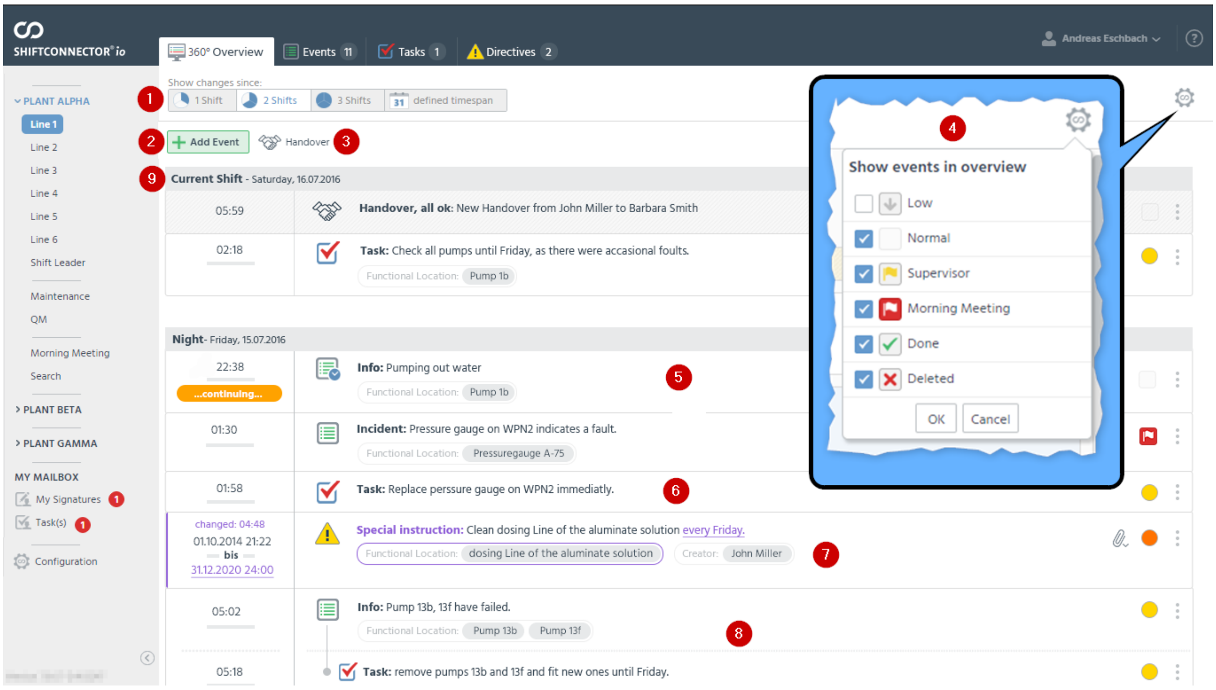


Figure 7-1: 360° View –Workplace with one shiftbook.

#	Name	Description
1	Filter bar	You can filter out a number of shifts or a defined period from 1 to a maximum of 28 days. For a detailed description of this filter please refer to *7.1.1 Filter Settings.*
2	Button *Add Event*	Via this button you can add an event as usual.
3	Button *Handover*	Via this button you can add a handover as usual.
4	Event filter	Via this filter, you can set which events you would like to see in the overview
5	Event which was changed during the filtered period	For a detailed description please read *7.1.2 Group "Current Shift"* and *7.1.3 Events changed during filter period.*
6	Task which was changed during the filtered period	For a detailed description please read *7.1.2 Group "Current Shift"* and *7.1.4 Tasks changed during filter period.*

7	Instruction which was changed during the filtered period	For a detailed description please read *7.1.2 Group “Current Shift”* and *7.1.5 Instructions changed during filter period.*
8	Linked entries	For a detailed description please read *7.1.6 Linked Entries*
9	Entries grouped per shift	These are the current shift plus the shifts from the filter. Should there be multiple shiftbooks for your workplace, the displayed shifts will be grouped by shiftbook on the highest level, as demonstrated *Figure 7-2: 360° Overview – Workplace with multiple shiftbooks.* See below.

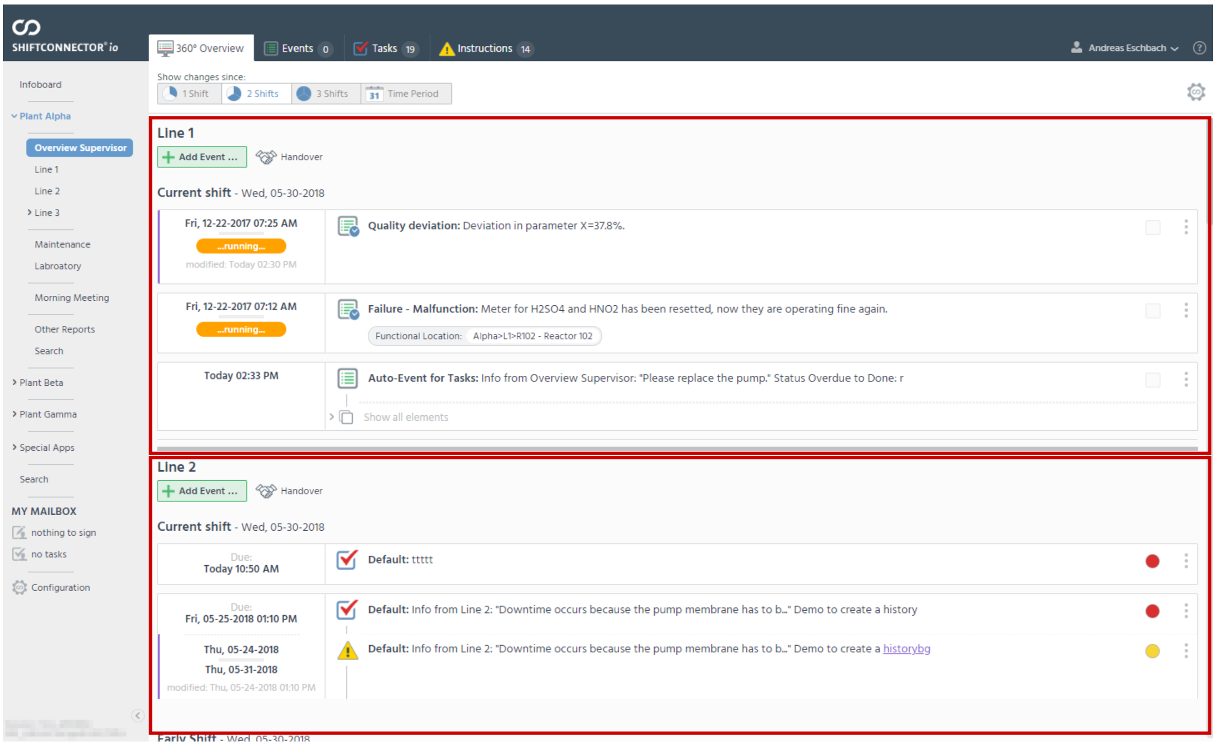


Figure 7-2: 360° Overview – Workplace with multiple shiftbooks.

7.1 Detailed Description

7.1.1 Filter Settings

It is possible to filter out one, two or three shifts, or a defined period of days.

1. The filter *Defined Period* enables the user to filter out 1-28 days. Additionally, to the shifts in the filter period, the current shift will always be shown as well.

2. The default filter gets set dependent on the user's last logout time.
    a. Example: If the user is on night shift and logs in for the first time on his shift, the filter will be automatically set to "*2 Shifts*". This way, he can directly check the entries of the preceding Early and Late Shift.
    b. If the last logout time dates back more than two shifts, the default filter will be set to *"2 shifts"*.

7.1.2 Group "*Current Shift*"

Which entries will be shown in the "Current shift" group?

1. Events, which start or end in the current shift, or entries which are still open (open end events).
2. Tasks, which are due during the current shift or were due in the filter period and have not been completed (overdue tasks), or tasks created in the current shift.
3. Instructions which have been created or updated during the current shift.

7.1.3 Events changed during filter period

What happens to events, which have been updated during the filter period, but have started in an earlier shift?

1. Events are always shown in the shift group, during which they have started, unless it is an event with an open end (see 7.1.2, point 1).
2. If an event is changed afterwards (e.g. Tuesday night) but has started five shifts earlier (Monday morning), the event will be shown in the group *Monday morning*, with the changes from Tuesday night.

   That means, for example if the filter is set to two shifts, the current shift, the two shifts before and the shift, in which the event that was changed, began, will be displayed (in this last shift, only the relevant event will be shown, all others not).

7.1.4 Tasks changed during filter period

What happens to tasks, which have been updated during the filter period, but were due in an earlier shift?

- Case 1 – with auto-event configured (on update):

  The auto-event gets allocated to its shift by its start date like all other events and displayed in there. The associated task will be shown linked below.

- Case 2 – No auto-event has been configured for update.

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If the task is not due or overdue in the filter period, it will still be displayed further down in the box *Open tasks*.

If the task is due in the current shift or became overdue in the filter period, it still will be shown at the top in the current shift.

- Auto-events which originate from creation of a task are not being represented in the 360° Overview.

7.1.5 Instructions changed during filter period

What happens to instructions, which have been updated during the filter period, but were valid since earlier shifts?

1. Has an instruction been changed, it will be shown in the shift, in which it was changed, as long it is within the filter period.
2. Otherwise it still will be shown further down in the box for *Open Instructions*.

7.1.6 Linked Entries

How will linked entries be shown?

1. Fundamentally the same rules apply as described in points 7.1.2 – 7.1.5.
2. Additionally, for linked entries the most current entry will be shown as parent element.
3. Below the parent element, all entries which have also been created or changed during the filter period will be shown straight away.
4. All entries, which are linked to the parent entry, but haven't been updated during the filter period, are not being displayed at first.
   They can be made visible via the button *Show all elements*. In this case, all relating entries are being shown sorted by Last Updated Date.

7.1.7 Sorting

How are entries being sorted?

1. Events
   a. Events are being sorted by end date descending, if it is present.
   b. If no end date is present, the start date is being used.
   c. If the event is still open, it will always be shown at the top of the current shift (event with open end).
2. Tasks
   a. Tasks are allocated to their shift by their due date and are sorted by it in ascending order.
3. Instructions
   a. Instructions are allocated to their shift by their start date and sorted by it in descending order, as long as there is no change to it.
   b. If there is a change to an instruction, the update date is used for allocation instead of the start date.

8 QR Code generator

Depending on the configuration, a QR Code symbol can be displayed at each workstation. This allows you to create QR Codes for the currently displayed list or the detailed view of an entry. When scanning the codes, the respective list or detail view of the entry is displayed.

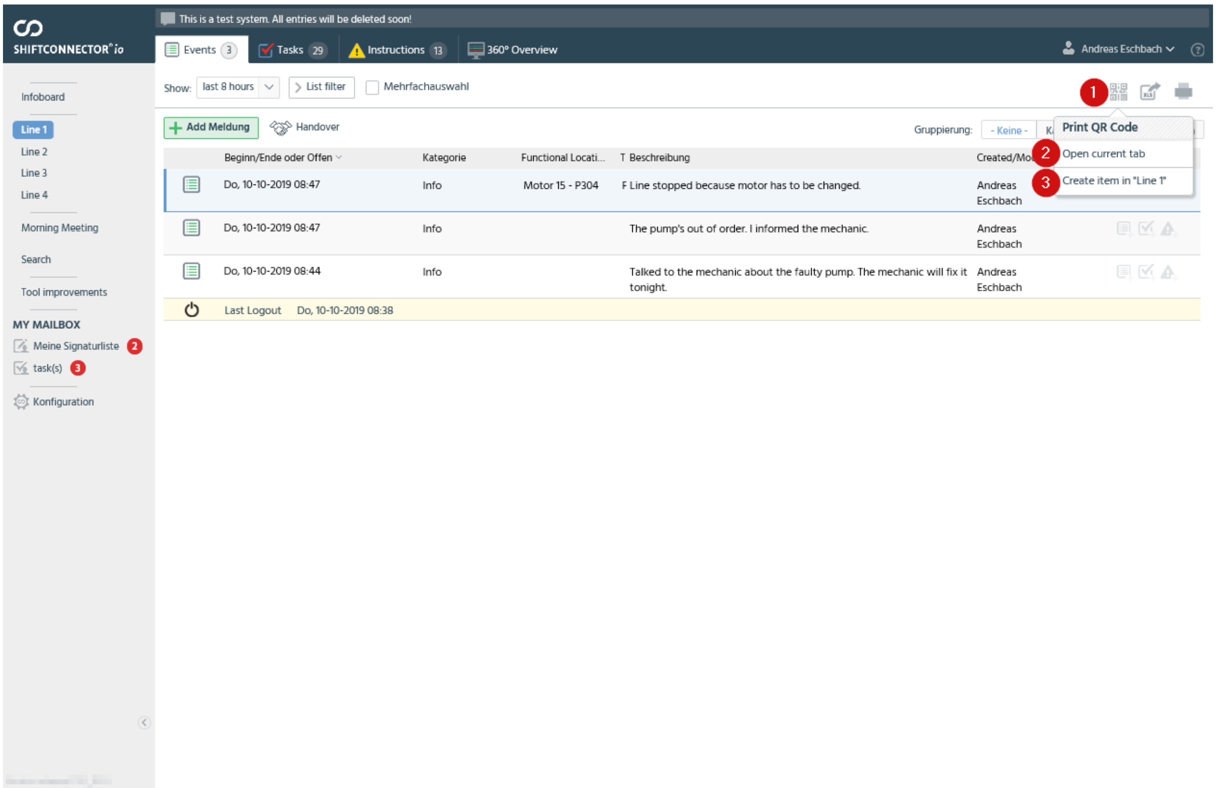

Figure 8-1: QR Code generator– Icon

#	Name	Beschreibung
1	QR Code Icon	Click the icon to expand the QR Code options.
2	Option “Open current tab“	Click on the "Open current tab" option to create a QR Code that opens the currently selected tab when scanning.
3	Option “Create entry in Line 1“	Click on the "Create entry in line 1" option to create a QR Code that opens the open form in the currently selected tab during scanning.

8.1 Open current tab

If you scan in a QR Code that you have created with the "Open current tab" option, the corresponding tab opens. Add for example the printed QR Code to a technical system (e.g. a scrubber), you can scan it with a mobile device and automatically land in the Shiftconnector in the correct shiftbook.

8.2 Create new entry using QR Code

If you scan in a QR Code, which you have created with the option "Create entry for xxx", the corresponding form template opens, with the category and the functional location preselected. This allows you to create a new entry in the correct shiftbook directly by scanning. For example, attach such a QR Code to a technical system in order to create maintenance tasks quickly and easily with a mobile device.

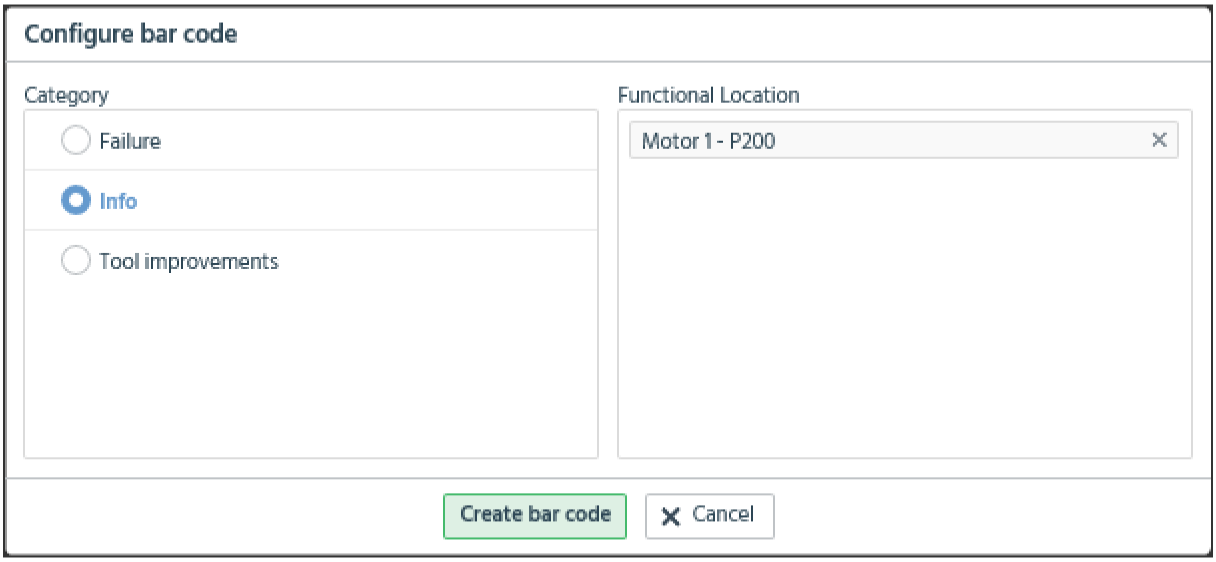

Figure 8-2: QR Code generator– QR Code configuration

#	Name	Beschreibung
1	Category	Select a category for the entry.
2	Functional Location	Select a functional location for the entry.