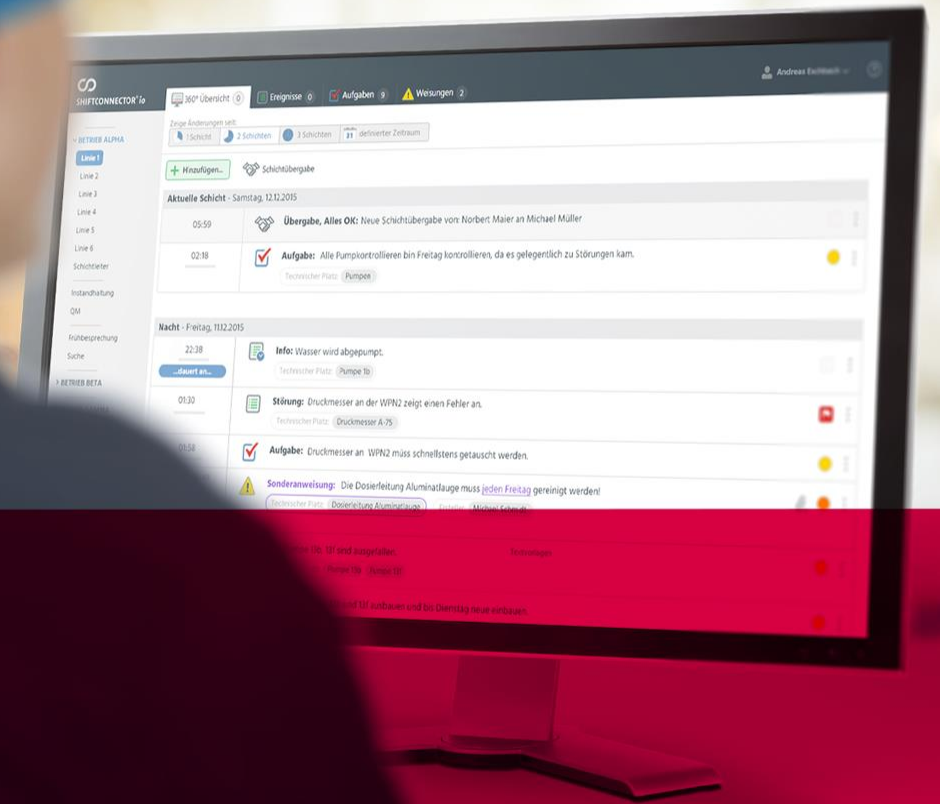


eschbach



SHIFTCONNECTOR[®] io

Shiftconnector[®] Administrator Training



Timetable

User management

- create user
- password reset

30 minutes

Master data

- functional locations

30 minutes

Break

20 minutes

Fields and forms

- add fields
- forms
- categories

90 minutes

Lunchbreak

60 minutes

Manage locks

15 minutes

Organizational register (permissions)

60 minutes

Break

20 minutes

Adjust list templates

20 minutes

Training concepts

1. The configuration will be explained by the consultants
2. You will solve sample problems independently
3. The solutions will be discussed together

Use case of this event

After the training, you will be able to handle the most common configuration changes

Advantages of the new admin interface

- Restructuring of configuration items
- Multiple front-end improvements
- More user-friendly
- Faster and more agile
- Adobe flash has been replaced by HTML5

Administration layout



Users

- User Accounts
- Teams
- Signature Reasons
- Roles
- Groups
- Manage Locks
- Active Directory groups



Master Data

- Functional Locations
- Text Modules
- Datasources



Organizational Register

- Organizational Register



Fields and Forms

- Field Library
- Form Designer
- Categories
- Event Priorities



Localization

- Languages
- Translations

General information for configuration changes

Some configuration changes are only visible after a complete Shiftconnector logout and login procedure

A new employee joins the company. You want to give them access to Shiftconnector®.

What needs to be done?

User management

Create new user

Configuration → User Accounts →

+ Create new user

in user information (red fields are mandatory!)

The screenshot displays the 'User Accounts' management interface in SHIFTCONNECTOR io. On the left, a sidebar contains navigation options like 'Infoboard', 'Shift Supervisor', and 'Configuration'. The main area shows a list of users with columns for name, tenant, status, and login type. A '+ Create new user' button is visible at the top of the list. On the right, a 'New user:' form is open, showing fields for 'io Identity', 'User ID', 'Password', 'User must change password', 'First Name', 'Last Name', 'eMail', 'Phone', 'Owner tenant', and 'Status'. Red highlights are present on the 'User ID', 'Password', 'First Name', and 'Last Name' fields, indicating they are mandatory. The 'Status' field is set to 'Active'.

Assign permission

→ Choose Tenant & Group assignment

The screenshot displays the SHIFTCONECTOR io User Accounts management interface. The main area shows a list of users with their names and assigned roles. A 'New user' dialog box is open on the right, showing the 'Tenant & Groups assignment' section where 'StandardUser' is selected.

Name	Assigned Roles
Anderson, Emma - Anderson	Shiftconnector StandardUser
Archer, Olivia - Archer	Shiftconnector StandardUser
Armstrong, Ava - Armstrong	Shiftconnector KeyUser StandardUser
Baker, Isabella - Baker	Login First: Wed, 04-10-2019 09:39 Last: Tue, 04-30-2019 12:36 Shiftconnector Global Administrator StandardUser
Bennett, Sophia - Bennett	Shiftconnector StandardUser
Bishop, Mia - Bishop	Shiftconnector StandardUser
Black, Charlotte - Black	Shiftconnector StandardUser
Blair, Amelia - Blair	Shiftconnector StandardUser

New user: OK Cancel

> User Data

▼ **Tenant & Groups assignment**

- Global Administrator
- Tenant: Shiftconnector
- KeyUser
- StandardUser

> Team assignment

> Sign reasons

> Default start settings

Assign user to team (1st possibility)

→ Select team assignment

The screenshot displays the SHIFTCONECTOR io User Accounts management interface. The main area shows a list of users with their names, roles, and login information. A modal window titled 'New user:' is open on the right, showing the 'Team assignment' section with a dropdown menu for 'Tenant' (set to 'Shiftconnector') and a list of checkboxes for team assignments: Administration, Maintenance, Shift A, Shift B, Shift C, and Shift D.

Name	Role
Anderson, Emma - Anderson	Shiftconnector StandardUser
Archer, Olivia - Archer	Shiftconnector StandardUser
Armstrong, Ava - Armstrong	Shiftconnector KeyUser StandardUser
Baker, Isabella - Baker	Login First: Wed, 04-10-2019 09:39 Last: Tue, 04-30-2019 12:36 Shiftconnector Global Administrator StandardUser
Bennett, Sophia - Bennett	Shiftconnector StandardUser
Bishop, Mia - Bishop	Shiftconnector StandardUser
Black, Charlotte - Black	Shiftconnector StandardUser
Blair, Amelia - Blair	Shiftconnector StandardUser
Brown, Evelyn - Brown	Shiftconnector StandardUser
Carter, Abigail - Carter	Shiftconnector KeyUser StandardUser

Assign user to team (2nd possibility)

Configuration → User Accounts → Teams → + Create a new team select existing team → search and assign user

The screenshot displays the SHIFTCONNECTOR io interface for managing teams. The main area shows a list of teams with the following details:

Team Name	Members
Administration	Cunningham, Sofia; Mason, Elijah; Norris, Daniel;
Maintenance	Archer, Olivia; Blair, Amelia; Connor, Avery; Hanson, Victoria; Johnson, Logan; King, Benjamin; Moore, Michael; Muller, Alexander; Stark, Joseph;
Shift A	Anderson, Emma; Baker, Isabella; Carter, Abigail; Edison, Ella; Hilton, Liam; Mason, Elijah; Parker, Matthew; Thomas, Brianna;
Shift B	Bennett, Sophia; Chaplin, Harper; Edwards, Madison; Hobbs, Noah; Mathewson, Oliver; Rodriguez, Aiden; Thompson, Ryan;
Shift C	Bishop, Mia; Coleman, Emily; Eschbach, Andreas; Jackson, William; Michaels, Jacob; Sawyer, Henry; West, Dylan;
Shift D	Anderson, Emma; Black, Charlotte; Collister, Elizabeth; Franklin, Scarlett; Jameson, James; Miller, Lucas; Smith, Jackson; Young, Ethan;

The right-hand panel for 'Shift A' shows the team's status as 'Active' and a list of users in the team:

- Anderson, Emma - Anderson
- Baker, Isabella - Baker
- Carter, Abigail - Carter
- Edison, Ella - Edison
- Hilton, Liam - Hilton
- Mason, Elijah - Mason
- Parker, Matthew - Parker
- Thomas, Brianna - Thomas

Exercise 1a (Basic)

From: laura.blindhammer@company.com
To: admin@company.com
Subject: New employee in maintenance department

Dear Admin-Team,

We are welcoming a new employee in the maintenance department next month. His name is Michael Weiss. Could you please create a new account for him? He should receive the same permissions as Connor Avery.

Thank you
Laura Blindhammer

Solution Exercise 1a

The screenshot shows the SHIFTCONECTOR io User Accounts management interface. A search bar at the top left contains the text "Connor". A callout box points to this search bar with the text "Search for „Connor“". Below the search bar, a list of users is displayed. One user, "Connor, Avery - Connor", is highlighted in blue. A callout box points to this user with the text "Select the person". To the right of the user list, a detailed profile for "Avery Connor" is shown. A callout box points to the "Tenant & Groups assignment" and "Team assignment" sections of the profile with the text "Check which access permissions he has and in which group he is". The profile shows the user is active and assigned to the "Shiftconnector" tenant.

Search for „Connor“

Select the person

Check which access permissions he has and in which group he is

Solution Exercise 1a

New user: Michael We... OK Cancel

▼ User Data

io Identity

User ID: Weiss Password:

User must change password

Michael Weiss

eMail: Phone:

Owner tenant: Shiftconnector

Status: Active

> Tenant & Groups assignment

> Team assignment

> Sign reasons

> Default start settings

Enter name and password

New user: Michael We... OK Cancel

> User Data

▼ Tenant & Groups assignment

Global Administrator

Tenant: Shiftconnector

KeyUser

StandardUser

> Team assignment

> Sign reasons

> Default start settings

Selection of access rights

New user: Michael We... OK Cancel

> User Data

> Tenant & Groups assignment

▼ Team assignment

Tenant: Shiftconnector

Administration

Maintenance

Shift A

Shift B

Shift C

Shift D

> Sign reasons

> Default start settings

Selection of the shift in which the employee works

Exercise 1b (Expert)

From: daniel.miller@company.com
To: admin@company.com
Subject: personnel structure adjustment

Hello Admin-Team,

Daniel Stone is leaving the company. Please delete his account.
For her replacement, Emily Coleman will switch to her shift.
A new employee named Paul Jarvis will join Shift B.
He should receive the same permissions as Daniel Stone.
Could you please adjust the requested changes?

Best regards
Daniel Miller

Solution Exercise 1b

The screenshot displays the SHIFTCONNECTOR io user management interface. A search bar at the top left contains the text "daniel". A callout box points to this search bar with the text "Search for „Daniel Stone“". Below the search bar, a list of users is shown. The user "Stone, Daniel - Stone" is highlighted with a blue background, and a callout box points to it with the text "Select the person". To the right of the user list, the profile for "Daniel Stone" is displayed. The "Status" dropdown menu is set to "Inactive", and a callout box points to it with the text "Set status to 'inactive'".

SHIFTCONNECTOR^{io}

This is a test system

User Accounts

daniel

Tenant Shiftconnector Status Login type AD io

Multi Editing Sorting Name Show all modified users

+ Create new user

io Norris, Daniel - Norris Shiftconnector Global Administrator

io Stone, Daniel - Stone Shiftconnector StandardUser

Daniel Stone

OK Cancel

▼ User Data

io io Identity

User ID Stone Password *****

User must change password

Daniel Stone

eMail Phone

Owner tenant Shiftconnector

Status Inactive

> Tenant & Groups assignment

> Team assignment

> Sign reasons

> Default start settings

Infoboard

Shift Supervisor

Line 1

Line 2

Line 3

Line 4

Morning Meeting

Search

Tool improvements

MY MAILBOX

nothing to sign

no tasks

Configuration

Users

User Accounts

Teams

Signature Reasons

Roles

Andreas Eschbach

A user forgot his password and cannot login to Shiftconnector® anymore.

What actions are needed that he can login again?

User management

Change password

Configuration → Users → User Accounts → select user → enter new password → make sure the checkbox *User must change password* is active

The screenshot displays the SHIFTCONECTOR io User Accounts management interface. The main table lists several users, with 'Bishop, Mia - Bishop' selected. The right-hand panel shows the user's profile details. Two red circles with numbers '1' and '2' highlight specific actions: circle '1' points to the 'Password' field, and circle '2' points to the 'User must change password' checkbox.

Name	Role
Anderson, Emma - Anderson	Shiftconnector StandardUser
Archer, Olivia - Archer	Shiftconnector StandardUser
Armstrong, Ava - Armstrong	Shiftconnector KeyUser StandardUser
Baker, Isabella - Baker	Login First: Wed, 04-10-2019 09:39 Last: Tue, 04-30-2019 12:36 Shiftconnector Global Administrator StandardUser
Bennett, Sophia - Bennett	Shiftconnector StandardUser
Bishop, Mia - Bishop	Shiftconnector StandardUser
Black, Charlotte - Black	Shiftconnector StandardUser
Blair, Amelia - Blair	Shiftconnector StandardUser
Brown, Evelyn - Brown	Shiftconnector StandardUser

User Profile: Mia Bishop

- io Identity: io Identity
- User ID: Bishop
- Password: ***** (1)
- User must change password (2)
- Mia: Bishop
- Mia.Bishop@company.com: Phone
- Owner tenant: No tenant
- Status: Active
- Tenant & Groups assignment
- Team assignment
- Sign reasons
- Default start settings

Exercise 2a (Basic)

From: Joseph.stark@company.com
To: admin@company.com
Subject: No access to Shiftconnector

Good morning Admin-Team,

I entered my password wrong several times. It looks my account is blocked.
Could you please check and reactivate it?

Best regards
Joseph Stark

Solution Exercise 2a

This is a test system. All entries will be deleted soon!

SHIFTCONNECTOR[®] io

Andreas Eschbach

Search...

Tenant Shiftconnector Status **Blocked** Login type AD io

Multi Editing Sorting Name Show all modified users

+ Create new user

Stark, Joseph - Stark Shiftconnector: KeyUser StandardUser

Displaying users: 1 | Active users: 42 | Licensed users: 100

Filter by blocked users

The screenshot shows the 'User Accounts' page in the SHIFTCONNECTOR io interface. A dropdown menu for the 'Status' filter is open, showing three options: 'Active' (unchecked), 'Inactive' (unchecked), and 'Blocked' (checked). A red box highlights the 'Blocked' option, and a callout bubble points to it with the text 'Filter by blocked users'. The main user list shows one user, 'Stark, Joseph - Stark', with a status of 'Blocked'.

This is a test system. All entries will be deleted soon!

SHIFTCONNECTOR[®] io

Andreas Eschbach

Search...

Tenant Shiftconnector Status **Blocked** Login type AD io

Multi Editing Sorting Name Show all modified users

+ Create new user

Stark, Joseph - Stark Shiftconnector: KeyUser StandardUser

Joseph Stark

User Data

io Identity

User ID Stark Password

User must change password

Joseph Stark

eMail Phone

Owner tenant Shiftconnector

Status **Active**

Tenant & Groups assignment

Select the person

Changing the status to "active"

The screenshot shows the 'User Accounts' page with the user 'Stark, Joseph - Stark' selected. A red box highlights the user entry, and a callout bubble points to it with the text 'Select the person'. The 'User Data' form is open on the right, showing the user's details. The 'Status' dropdown menu is open, and the 'Active' option is selected. A red box highlights the 'Active' option, and a callout bubble points to it with the text 'Changing the status to "active"'. The 'User Data' form includes fields for 'User ID', 'Password', 'User must change password', 'Name', 'eMail', 'Phone', and 'Owner tenant'.

Exercise 2b (Expert)

From: Thompson.ryan@company.com

To: admin@company.com

Subject: Password reset

Admin-Team,

I forgot my password.
Please reset it.

Solution Exercise 2b

The screenshot shows the SHIFTCONNECTOR io user management interface. A search bar at the top left contains the text "thompson". A callout box above it says "Search for „Thompson“". Below the search bar, a list of users is displayed, with one entry highlighted: "Thompson, Ryan - Thompson" with the role "Shiftconnector StandardUser". A callout box below this entry says "Select the person". To the right, the user profile for "Ryan Thompson" is shown. The "User Data" section includes a "Password" field with a red box around it and a checked option "User must change password". A callout box above this section says "Enter a new password and check 'User must change password'". The interface also shows a sidebar with navigation options like "Infoboard", "Shift Supervisor", and "MY MAILBOX".

There is a new functional location in your company.

You want to add it into Shiftconnector®

How?

Master data

Create functional location

Master data → Functional Locations →

+ Create new functional location

etails

The screenshot displays the 'Functional Locations' interface in the SHIFTCONNECTOR io system. The top navigation bar shows the user 'Andreas Eschbach'. The main content area features a search bar and filters for 'Tenant' (Shiftconnector) and 'Status' (Active). A table lists functional locations with columns for 'Code' and 'Description', showing one entry: 'A' for 'Plant A'. A '+ Create new functional location' button is positioned above the table. On the right, a modal form for creating a new functional location is open, with fields for 'Code', 'Description', and 'Tenant' (Shiftconnector). A red error message 'Code is required' is displayed below the 'Code' field. The left sidebar contains navigation options like 'Infoboard', 'Shift Supervisor', 'Line 1-4', 'Morning Meeting', 'Search', 'Tool Improvements', 'MY MAILBOX', 'Configuration', and 'Master Data'.

Exercise 3a (Basic)

From: Mason.martin@company.com

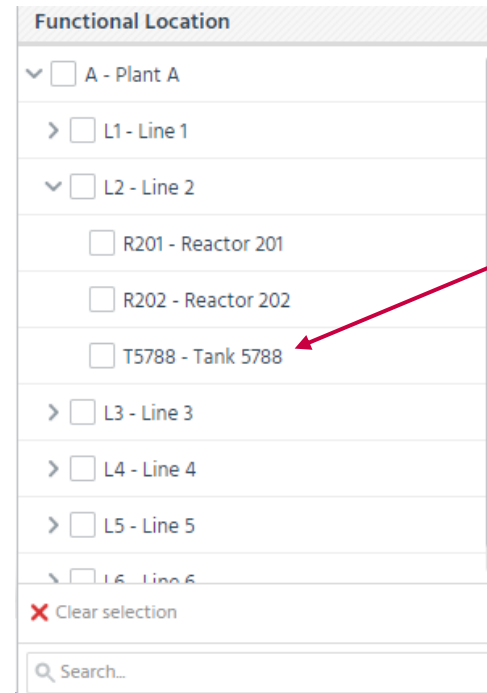
To: admin@company.com

Subject: missing Tank 6772

Dear Admin-Team,

I am not able to find Tank 6772 within Shiftconnector.io
Could you please add this tank to “Plant A” below L2?
Please see my screenshot below.

With kind regards
Mason Martin



Solution Exercise 3a

This is a test system. All entries will be deleted soon!

SHIFTCONNECTOR[®] io

Functional Locations

Search...

Tenant Shiftconnector Status ✓ ✗

Save & close Cancel

Andreas Eschbach

+ Create new functional location

Code	Description	
√ ≡ A	Plant A	✓ □ +
> ≡ L1	Line 1	✓ □ +
√ ≡ L2	Line 2	✓ □ +
≡ R201	Reactor 201	✓ □ +
≡ R202	Reactor 202	✓ □ +
≡ T5788	Tank 5788	✓ □ +
> ≡ L3	Line 3	✓ □ +
> ≡ L4	Line 4	✓ □ +
> ≡ L5	Line 5	✓ □ +
> ≡ L6	Line 6	✓ □ +

You have to click on the plus at L2 to add a technical space underneath.

Solution Exercise 3a

This is a test system. All entries will be deleted soon!

SHIFTCONNECTOR[®] io

Functional Locations

Search...

Tenant Shiftconnector Status

+ Create new functional location

Code	Description
▼ A	Plant A
> L1	Line 1
▼ L2	Line 2
R201	Reactor 201
R202	Reactor 202
T5788	Tank 5788
> L3	Line 3
> L4	Line 4
> L5	Line 5
> L6	Line 6

Code

Status Active

Code T66772

Description Tank 6772

Tenant Shiftconnector

OK Cancel

1

2

Exercise 3b (Expert)

From: Aiden.rodriguez@company.com

To: admin@company.com

Subject: New fire alert system

Dear Admin-Team,

We received a brand new fire alert system.
Could you please add it as a new superior item
at the funclocs?

With kind regards
Aiden Rodriguez

```
Fire alert system
>Anti smoke ventilation
  >Elevator shaft
  >High rack storage
  >Substation
>alert system
  >Smoke detector
  >Heat detector
  >Flame detector
>Fire department control panel
  >FBF
  >FAT
  >FIBS
```

Solution Exercise 3b

This is a test system. All entries will be deleted soon!

SHIFTCONNECTOR[®] io

Functional Locations

Search...

Tenant: Shiftconnector Status: ✓ ✗

+ Create new functional location 1

Code	Description
√ A	Plant A
> L1	Line 1
√ L2	Line 2
≡ R201	Reactor 201
≡ R202	Reactor 202
≡ T5788	Tank 5788
≡ T66772	Tank 6772
> L3	Line 3
> L4	Line 4
> L5	Line 5
> L6	Line 6

Code

Status: ✓ Active

Code: Fire alert system 2

Description: Fire alert system

Tenant: Shiftconnector

OK Cancel

Solution Exercise 3b

- To make a sub-item of fire alarm system there must be pressed on the pulse behind it

The screenshot shows the 'Functional Locations' configuration page in the SHIFTCONNECTOR io system. The table lists various functional locations, including 'Fire alert system', 'Anti smoke ventilation', 'Elevator shaft', 'High rack storage', 'Substation', 'alert system', 'Smoke detector', 'Heat detector', 'Flame detector', 'Fire department control panel', 'FBF', 'FAT', and 'FIBS'. Each row has a plus icon in the rightmost column, which is highlighted with a red circle and the number '1' for the 'Fire alert system' row. The 'Save & close' button is highlighted with a red box in the top right corner.

Code	Description	
> L4	Line 4	✓ ☒ +
> L5	Line 5	✓ ☒ +
> L6	Line 6	✓ ☒ +
Fire alert system	Fire alert system	✓ ☒ +
Anti smoke ventilation	Anti smoke ventilation	✓ ☒ +
Elevator shaft	Elevator shaft	✓ ☒ +
High rack storage	High rack storage	✓ ☒ +
Substation	Substation	✓ ☒ +
alert system	alert system	✓ ☒ +
Smoke detector	Smoke detector	✓ ☒ +
Heat detector	Heat detector	✓ ☒ +
Flame detector	Flame detector	✓ ☒ +
Fire department control panel	Fire department control panel	✓ ☒ +
FBF	FBF	✓ ☒ +
FAT	FAT	✓ ☒ +
FIBS	FIBS	✓ ☒ +

You need a new form with new fields.

How do you proceed?

Fields and forms

Create new fields

Fields and Forms → Field Library →

+ Create new business field

→ Fill in mandatory fields

The screenshot displays the SHIFTCONECTOR io Field Library interface. On the left, a navigation sidebar includes 'Infoboard', 'Shift Supervisor', 'Line 1-4', 'Morning Meeting', 'Search', 'Tool improvements', 'MY MAILBOX', and 'Configuration'. The main area shows a table of existing fields with columns for System name, Name, Assigned to form templates, and Type. A '+ Create new business field' button is visible at the top of the table. On the right, a 'New business field:' dialog box is open, containing input fields for Type, Name, System name, and Tenant, along with 'OK', 'Cancel', and 'Delete' buttons.

System name ^	Name	Assigned to form templates	Type
AssignedShiftbooks	Assigned Shiftbooks	4	ShiftbookSelect
Attachments	Attachments	4	Attachment
Batch	Batch	0	StandardText
Category	Category	6	Category
CreationUser_LastEditUser	Created/Modified by	0	CalculatedString
Description	Description	4	DescriptionWithAutoComplete
DirectiveAssignedWorkcenter	Workcenter	2	DirectiveWorkcenterSelect
DirectiveDateTime	Time Range	2	DirectiveDateTimeRange
DirectiveStatus	Status	2	DirectiveStatus
DueDate	Due Date	1	DueDateRecurrence
EIT_Verbesserungsvorschlag_Prio	Priority	1	Combobox
EntryItemReportColor	Color for records in report	0	CalculatedString

Create new form

Fields and Forms → Copy default form (all mandatory fields already included)

The screenshot shows the SHIFTCONECTOR io Form Designer interface. The top navigation bar includes the logo, the title 'Form Designer', and the user name 'Andreas Eschbach'. Below the navigation bar, there is a search bar and filters for 'Tenant' (Shiftconnector) and 'Entry type' (All). A '+ Create new form' button is visible. The main area displays a list of forms with their names, associated tenants, and field lists. The 'Default' form with a checkmark icon is highlighted, and its copy icon is circled in red. The 'Handover' form has fields 'Field deviation', 'Description', and 'SummaryDescription'. The 'Tool_improvements' form has fields 'Field deviation', 'AssignedShiftbooks', and 'EventStatus'. The 'Work Permit' form is marked with a warning icon.

Name	Tenant	Fields	Action
Default	Tenant Shiftconnector		Copy
Default	Tenant Shiftconnector		Copy
Default	Tenant Shiftconnector		Copy
Handover	Tenant Shiftconnector	Field deviation, Description, SummaryDescription	Copy
Placeholder	Tenant Shiftconnector		Copy
Template_Production	Tenant Shiftconnector		Copy
Tool_improvements	Tenant Shiftconnector	Field deviation, AssignedShiftbooks, EventStatus	Copy
Work Permit	Tenant Shiftconnector		Copy

Adjust forms

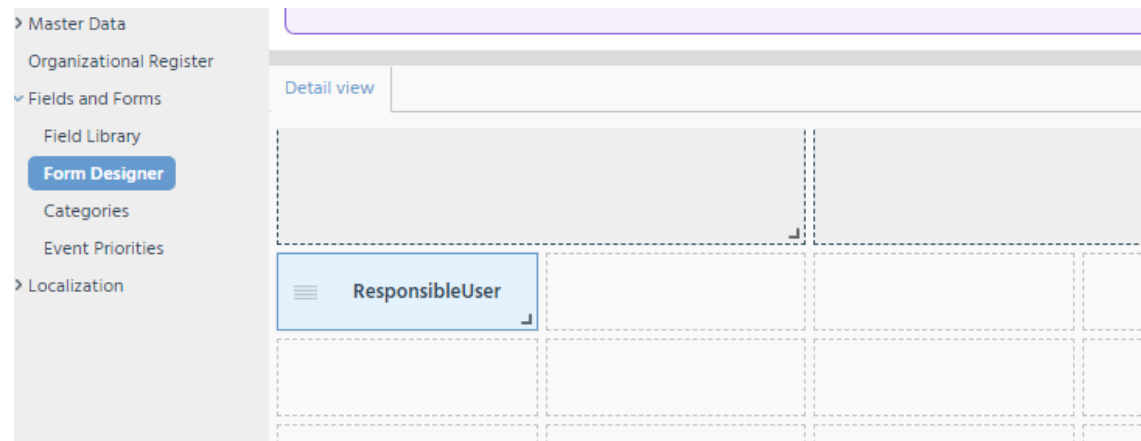
- 1 Rename form →
- 2 Search field library

The screenshot displays the SHIFTCONNECTOR io Form Designer interface. At the top, the 'Form name' field is highlighted with a red circle '1' and contains the text 'Copy of Default'. Below this, a table lists various fields with their properties. A search bar in the 'Field Library' section is highlighted with a red circle '2'.

Name	Type	Visible in auto event task	Visible in auto event directive	Visible in det...
Assigned Shiftbooks	ShiftbookSelect	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Attachments	Attachment	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Category	Category	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Description	DescriptionWithAutoComplete	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Event Start Date Time	EventDateTimeRange	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Priority	EventStatus	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Adjust forms

- Use Drag & Drop to change the position of an added field
- To change the size of the field, simply drag the lower right corner



Exercise 4a (Basic)

From: laura.Blindhammer@company.com

To: admin@company.com

Subject: Filling quantity and tank

Hi Admin-Team,

We need a new decimal field at the shift handover where we can fill in the filling quantity in kg. In addition we need a combobox where we can select the tank that was filled from. Please only show “T.6788”, “T.5788” and “T.4788” in the list.

Thank you
Laura Blindhammer

Solution Exercise 4a

This is a test system. All entries will be deleted soon!

SHIFTCONNECTOR[®] io

Field Library

Search... Tenant Shiftconnector Type All

+ Create new business field 1

System name	Name	Assigned to form templates	Type
AssignedShiftbooks	Assigned Shiftbooks		
Attachments	Attachments		
Batch	Batch		
Category	Category	5	Category
CreationUser_LastEditUser	Created/Modified by	0	CalculatedString
Description	Description	4	DescriptionWithAutoComplete
DirectiveAssignedWorkcenter	Workcenter	1	DirectiveWorkcenterSelect
DirectiveDateTime	Time Range	1	DirectiveDateTimeRange
DirectiveStatus	Status	1	DirectiveStatus
DueDate	Due Date	1	DueDateRecurrence
EIT_Verbesserungsvorschlag_Prio	Priority		
EntryItemReportColor	Color for records in report		
EventStartDateTime	Event Start Date Time		

Select the field type and enter the name

New business field: Fil... OK Cancel

Type Decimal 2

Name Filling quantity (kg)

System name SC_Fillingquantitykg

Tenant Shiftconnector

Copy value from parent element

Default decimal

Is mandatory
 Only editable in creation mode
 Is read only field

Decimal digits 2

Min. value 0 3

Max. value 10000

> Assigned to form templates
> Used in following categories

Enter maximum number if a limit is required

Solution Exercise 4a

This is a test system. All entries will be deleted soon!

SHIFTCONNECTOR[®] io

Field Library

Search... Tenant Shiftconnector Type All

+ Create new business field

System name ^	Name	Type
AssignedShiftbooks	Assigned Shiftbooks	
Attachments	Attachments	
Batch	Batch	0 StandardText
Category	Category	5 Category
CreationUser_LastEditUser	Created/Modified by	0 CalculatedString
Description	Description	4 DescriptionWithAutoComplete
DirectiveAssignedWorkcenter	Workcenter	1 DirectiveWorkcenterSelect
DirectiveDateTime	Time Range	1 DirectiveDateTimeRange
DirectiveStatus	Status	1 DirectiveStatus
DueDate	Due Date	1 DueDateRecurrence
EIT_Verbesserungsvorschlag_Prio	Priority	1 Combobox

New business field: Ta... OK Cancel

Type Combobox

Name Tank

System name SC_Tank

Tenant Shiftconnector

List List is required

Copy value from parent element

Is mandatory

Only editable in creation mode

Is read only field

Allow multi selection

> Assigned to form templates

> Used in following categories

Select the field type and enter the name

Press the pencil to create a selection list

Solution Exercise 4a

The screenshot shows the 'Manage lists' interface. A sidebar on the left contains a list of lists, with 'EIT_Improvements_Prio' selected. The main area displays a table with columns for 'Label', 'Icon', 'Status', and 'Value 1' through 'Value 9'. The table contains three rows with labels 'T5788', 'T5788', and 'T4788', each with a status of 'Active'. The interface includes a 'Name' field with the value 'Tank', a '+ Create new list' button, and a '+ Add option' button. Red callouts with numbers 1-4 point to these elements.

1. Press to create a new list

2. Give list a name

3. Add lines to the list

4. Enter what to select from the list

Solution Exercise 4a

This is a test system. All entries will be deleted soon!

SHIFTCONNECTOR® io

Field Library

Search... Tenant Shiftconnector Type All

+ Create new business field

System name ^	Name	Assigned to form templates	Type
AssignedShiftbooks	Assigned Shiftbooks	4	ShiftbookSelect
Attachments	Attachments	4	Attachment
Batch	Batch	0	StandardText
Category	Category	5	Category
CreationUser_LastEditUser	Created/Modified by	0	CalculatedString
Description	Description		
DirectiveAssignedWorkcenter	Workcenter		
DirectiveDateTime	Time Range		
DirectiveStatus	Status	1	DirectiveStatus
DueDate	Due Date	1	DueDateRecurrence
EIT_Verbesserungsvorschlag_Prio	Priority	1	Combobox

New business field: Ta...

Type

Name

System name

Tenant

List
 EIT_Improvements_Prio
 Tank

Is mandatory
 Only editable in creation mode
 Is read only field
 Allow multi selection

> Assigned to form templates
> Used in following categories

Select the new list.

Solution Exercise 4a

This is a test system. All entries will be deleted soon!

SHIFTCONNECTOR[®] io Form Designer Andreas Eschbach

Type: Events Form name: Handover

Designer Settings Attach buttons

+ Add field

Name	Type	Visible in auto event task	Visible in auto event directive	Visible in det...
Tank	Combobox SC_Tank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Category		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Description	Description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EventStatus	Priority	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SummaryDescription	Description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Field deviation

Field deviation

Detail view Auto event task Auto event directive

SummaryDescription

Description Attachments

Version release/7.4.0_RC10

Solution Exercise 4a

This is a test system. All entries will be deleted soon!

SHIFTCONECTOR^{io} Andreas Eschbach

Show: last 24 hours List filter

+ Add Event Handover

Grouping: - None - Category Functional Location Priority

Start/End or Open	Category	Functional Location	Description	Created/Modified by	Attach...	Priority
Last Logout Thu, 09-05-2019 16:03						
Thu, 09-05-2019 11:43	Failure	Reactor 301	Reactor is leaking	Emma Anderson		

Handover

New handover from: <Current User>

Description

Filling quantity (kg) Tank

Drop file here or Attach File ...

Attach Task Attach Instruction

User Name Password

Save Cancel

Version release/7.4.0_RC10

There you can see the two new fields

Exercise 4b (Expert)

From: laura.Blindhammer@company.com

To: admin@company.com

Subject: SHE-Event adjustment

Hello Admin-Team,

we would like to adjust the SHE-Form as follows:

- Mandatory TreeSelect "Incident" (unsafe behavior, unsafe condition, security policy breach)
- Mandatory TreeSelect "type of threat" (thermal, mechanical, organic, electricity, work at high ground, other)
- person in charge (list all user) -> mandatory
- Description
- possible reason (if known)
- Improvement proposal (if known)

Best regards

Laura Blindhammer

Solution Exercise 4b

The screenshot shows a 'Manage lists' interface. On the left, there are two list boxes: 'EIT_Improvements_Prio' and 'Tank'. The main area contains a table with columns: Label, Icon, Status, Value 1, Value 2, Value 3, Value 4, Value 5, Value 6, Value 7, Value 8, and Value 9. The table has three rows with labels 'unsafe behavior', 'unsafe condition', and 'security policy breach'. Each row has a plus icon, a minus icon, a checkbox, and a status dropdown set to 'Active'. At the bottom left, there is a '+ Create new list' button. At the bottom center, there is a '+ Add option' button. Annotations with red boxes and arrows point to various elements: 'Give list a name' points to the 'Name' input field containing 'Incident'; 'Enter what to select from the list' points to the 'Label' column of the table; 'Press to create a new list' points to the '+ Create new list' button; and 'Add lines to the list' points to the '+ Add option' button.

Manage lists

EIT_Improvements_Prio

Tank

Name
Incident

Give list a name

Label	Icon	Status	Value 1	Value 2	Value 3	Value 4	Value 5	Value 6	Value 7	Value 8	Value 9
unsafe behavior	+ X	<input type="checkbox"/> Active									
unsafe condition	+ X	<input type="checkbox"/> Active									
security policy breach	+ X	<input type="checkbox"/> Active									

Enter what to select from the list

Press to create a new list

+ Create new list

+ Add option

Add lines to the list

Solution Exercise 4b

The screenshot shows a 'Manage lists' interface. On the left, there is a sidebar with three existing lists: 'EIT_Improvements_Prio', 'Incident', and 'Tank'. The main area contains a form for creating a new list. The form has a 'Name' field with the text 'Type of threat' and a 'Save' button. Below the form is a table with columns for 'Label', 'Icon', 'Status', and 'Value 1' through 'Value 9'. The table contains six rows of options: 'thermal', 'mechanical', 'organic', 'electricity', 'work at high ground', and 'other'. Each row has a plus sign, a minus sign, a checkbox, and a status dropdown set to 'Active'. At the bottom left, there is a '+ Create new list' button. At the bottom center, there is a '+ Add option' button. Annotations with red boxes and arrows point to these elements: 'Give list a name' points to the 'Name' field; 'Enter what to select from the list' points to the 'Label' column of the table; 'Press to create a new list' points to the '+ Create new list' button; and 'Add lines to the list' points to the '+ Add option' button.

Manage lists

This is a test system. All entries will be deleted soon!

Name
Type of threat

Give list a name

Label	Icon	Status	Value 1	Value 2	Value 3	Value 4	Value 5	Value 6	Value 7	Value 8	Value 9
thermal	+ X	<input type="checkbox"/> Active									
mechanical	+ X	<input type="checkbox"/> Active									
organic	+ X	<input type="checkbox"/> Active									
electricity	+ X	<input type="checkbox"/> Active									
work at high ground	+ X	<input type="checkbox"/> Active									
other	+ X	<input type="checkbox"/> Active									

OK Cancel

Press to create a new list

+ Create new list

Add lines to the list

+ Add option

Solution Exercise 4b

The image displays three sequential screenshots of the Shiftconnector configuration interface, illustrating the steps to create mandatory business fields. Red boxes and arrows highlight key actions:

- Top Screenshot:** Shows the configuration for an existing field named "Incident". The "Type" dropdown is set to "TreeSelect". A red box highlights the "Type" dropdown, and an arrow points from a central instruction box to it.
- Middle Screenshot:** Shows the configuration for a new business field named "Type of threat". The "Type" dropdown is set to "TreeSelect". A red box highlights the "Type" dropdown, and an arrow points from the central instruction box to it. Below, the "Is mandatory" checkbox is checked. A red box highlights this checkbox, and an arrow points from a bottom instruction box to it.
- Bottom Screenshot:** Shows the configuration for a new business field named "Person in charge". The "Type" dropdown is set to "UserList". A red box highlights the "Type" dropdown, and an arrow points from the central instruction box to it. Below, the "Is mandatory" checkbox is checked. A red box highlights this checkbox, and an arrow points from the bottom instruction box to it.

Central instruction box: **Select the field type and enter the name**

Bottom instruction box: **Set it as "is mandatory"**

Solution Exercise 4b

The image shows two side-by-side screenshots of the 'New business field' configuration dialog in SAP. A central text box with a red border contains the instruction 'Select the field type and enter the name'. Two red arrows point from this text box to the 'Type' dropdown menu and the 'Name' text field in both screenshots.

Left Screenshot: 'New business field: P...'

- Type:** StandardText (dropdown menu)
- Name:** Possible reason
- System name:** SC_Possiblereason
- Tenant:** Shiftconnector
- Copy value from parent element
- Default string:** (empty text box)
- Is mandatory
- Only editable in creation mode
- Is read only field
- Min. length:** 0
- Max. length:** 10000
- > Assigned to form templates
- > Used in following categories

Right Screenshot: 'New business field: I...'

- Type:** StandardText (dropdown menu)
- Name:** Improvement proposal
- System name:** SC_Improvementproposal
- Tenant:** Shiftconnector
- Copy value from parent element
- Default string:** (empty text box)
- Is mandatory
- Only editable in creation mode
- Is read only field
- Min. length:** 0
- Max. length:** 10000
- > Assigned to form templates
- > Used in following categories

Solution Exercise 4b

Copy a default form so that important fields are already on it

The screenshot displays the SHIFTCONNECTOR io Form Designer interface. At the top, there is a notification: "This is a test system. All entries will be deleted soon!". The user is identified as "Andreas Eschbach". The interface includes a search bar, filters for "Tenant" (Shiftconnector) and "Entry type" (All), and a "Create new form" button. A list of forms is shown below, each with a "Copy" icon on the right. The second form in the list, labeled "Default", has its "Copy" icon highlighted with a red box. A callout box points to this icon with the text: "Copy a default form so that important fields are already on it".

Form Name	Fields
Default	Tenant Shiftconnector
Default	Tenant Shiftconnector
Default	Tenant Shiftconnector
Failure	Tenant Shiftconnector, Field deviation, SummaryDescription
Handover	Tenant Shiftconnector, Field deviation, Description, SummaryDescription
Placeholder	Tenant Shiftconnector
Tool_improvements	Tenant Shiftconnector, Field deviation, AssignedShiftbooks, EventStatus

Solution Exercise 4b

This is a test system. All entries will be deleted soon!

SHIFTCONNECTOR[®] io

Form Designer

Type: Events | Form name: SHE | Shiftconnector

Designer | Settings | Attach buttons

+ Add field

Add fields

System name	Name	Type	Visible in auto event task	Visible in auto event directive	Visible in det...
AssignedShiftbooks	Assigned Shiftbooks	ShiftbookSelect	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Attachments	Attachments	Attachment	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Category	Category	Category	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Description	Description	DescriptionWithAutoComplete	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
EventStartDateTime	Event Start Date Time	EventDateTimeRange	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EventStatus	Priority	EventStatus	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Detail view | Auto event task | Auto event directive

Visual form layout fields: AssignedShiftbooks, EventStartDateTime, EventStatus, SC_Incident, SC_Typeofthreat, SC_Personincharge, SC_Possiblereason, Category, SC_Improvementproposal, FuncLocs, Description, Attachments.

Solution Exercise 4b

This is a test system. All entries will be deleted soon!

SHIFTCONNECTOR^{io} Categories Andreas Eschbach

Search... Tenant: Shiftconnector Events

+ Create new category

Name	Tenant	System name	Form template
Directive created	Shiftconnector	autoEventForDirectiveCreation	Default
Directive edited	Shiftconnector	autoEventForDirective	Default
Event edited	Shiftconnector	autoEventForEvent	Default
Failure	Shiftconnector		Failure
Handover	Shiftconnector	handover	Handover
Info	Shiftconnector	info	Default
SHE	Shiftconnector		Default
Task created	Shiftconnector	autoEventForTaskCreation	Default
Task edited	Shiftconnector	autoEventForTask	Default
Tool improvements	Shiftconnector		Tool_improvements

SHE

Status: Active

Type: Events

Tenant: Shiftconnector

Name: SHE

Form template: SHE

Fields Settings

- AssignedShiftbooks
- Attachments
- Category
- Description
- EventStartDateTime
- EventStatus
- FuncLocs
- SC_Improvementproposal
- SC_Incident
- SC_Personincharge
- SC_Possiblereason
- SC_Typeofthreat

Solution Exercise 4b

The screenshot displays the SHIFTCONNECTOR io web application interface. At the top, a dark header bar contains the logo, a notification "This is a test system. All entries will be deleted soon!", and navigation tabs for "Events 1", "Tasks 0", and "Instruction 0". The user "Andreas Eschbach" is logged in. A sidebar on the left lists navigation options like "Infoboard", "Shift Supervisor", and "Line 1" through "Line 4".

The main content area shows a table of events. The first event is highlighted:

Start/End or Open	Category	Functional Location	Description	Created/Modified by	Attach.	Priority
Thu, 09-05-2019 11:43	Failure	Reactor 301	Reactor is leaking	Emma Anderson	<input type="checkbox"/>	<input type="checkbox"/>

A red callout box labeled "New form template" points to a modal window titled "Event". This form contains the following fields:

- Category: Radio buttons for Failure, Info, and SHE (selected).
- Assigned Shiftbooks: Dropdown menu showing "Line 1".
- Event Start Date Time: Date and time picker set to "Fri, 09-06-2019 10:01".
- Priority: Dropdown menu set to "normal".
- Incident: Dropdown menu.
- Type of threat: Dropdown menu.
- Person in charge: Dropdown menu.
- Possible reason: Text input field.
- Improvement proposal: Text input field.
- Functional Location: A button labeled "Choose functional location ...".
- Description: A large text area with a "Text Modules" icon.
- Attachments: A dashed box with the text "Drop file here or Attach File ...".

At the bottom of the form, there are checkboxes for "Attach Task ..." and "Attach Instruction ...", and "Save" and "Cancel" buttons.

One of your employees would like to have a new category at his workstation. The recent created form should be assigned to this category. How do you proceed?

Fields and forms

Create category and assign form

Fields and Forms → Categories → **1** Select type (Event, Task, Directive)

→ **+ Create new category** → **2** Name category and assign form

The screenshot shows the SHIFTCONECTOR io Categories management interface. The main table lists various categories with columns for Name, Tenant, System name, and Form template. A 'New Category' modal is open on the right, showing fields for Status (Active), Type (Events), Tenant (Shiftconnector), Name (Name), Form template, and Assign to structure item (No assignments). Red circles with numbers 1 and 2 highlight the 'Create new category' button and the 'Name' field respectively.

Name	Tenant	System name	Form template
Directive created	Shiftconnector	autoEventForDirectiveCreation	Default
Directive edited	Shiftconnector	autoEventForDirective	Default
Event edited	Shiftconnector	autoEventForEvent	Default
Handover	Shiftconnector	handover	Handover
Info	Shiftconnector	info	Default
Production	Shiftconnector		Template_Production
Task created	Shiftconnector	autoEventForTaskCreation	Default
Task edited	Shiftconnector	autoEventForTask	Default
Tool improvements	Shiftconnector		Tool_improvements

Exercise 5a (Basic)

From: dennis.brueggerhoff@company.com

To: admin@company.com

Subject: New category "Fire Alert System"

Hi Admin-Team,

Could you please add a new category "Fire Alert System" for events?
Please use the same fields from "info" category.

Thank you for your support
Dennis Brümmerhoff

Solution Exercise 5a

This is a test system. All entries will be deleted soon!

SHIFTCONNECTOR^{io} Categories Andreas Eschbach

Search...

+ Create new category

Name	Tenant	System name	Form template
Directive created	Shiftconnector	autoEventForDirectiveCreation	Default
Directive edited	Shiftconnector	autoEventForDirective	Default
Event edited	Shiftconnector	autoEventForEvent	Default
Failure	Shiftconnector	Failure	Failure
Handover	Shiftconnector	handover	Handover
Info	Shiftconnector	info	Default
SHE	Shiftconnector	SHE	SHE
Task created	Shiftconnector	autoEventForTaskCreation	Default
Task edited	Shiftconnector	autoEventForTask	Default
Tool improvements	Shiftconnector	Tool_improvements	Tool_improvements

Fire Alert System OK Cancel

Status Active Delete

Type Events

Tenant Shiftconnector

Name Fire Alert System

Form template Default

Fields Settings

- AssignedShiftbooks
- Attachments
- Category
- Description
- EventStartDateTime
- EventStatus
- FuncLocs

Assign to structure item

Line 1	X
Line 2	X
Line 3	X
Line 4	X

Exercise 5b (Expert)

From: dennis.brueggerhoff@company.com

To: admin@company.com

Subject: New category “work instruction”

Hi Admin-Team,

We need our “work instructions” in a separate category.

The form should look like “Default”

At work instructions please mark “Description”, “Signature” and “Attachment” as mandatory.

Thanks

Dennis Brümmerhoff

Solution Exercise 5b

This is a test system. All entries will be deleted soon!

SHIFTCONNECTOR^{io}

Categories

Search...

+ Create new category

Tenant Shiftconnector

Events Tasks Directives

Name	Tenant	System name	Form template
General	Shiftconnector		Default

Work instructions

Status Active

Type Directives

Tenant Shiftconnector

Name Work instructions

Form template Default

Fields Settings

- Attachments - Deviation
 - Use name of form template
 - Name Attachments
 - Use defaults of form template
 - Copy value from parent element
 - Use validation rules of form template
 - Is mandatory
 - Only editable in creation mode
 - Is read only field
 - Allow multi selection

> Category

> Description

> DirectiveAssignedWorkcenter

Andreas Eschbach

Solution Exercise 5b

This is a test system. All entries will be deleted soon!

SHIFTCONNECTOR[®] io

Categories

Search_

Tenant Shiftconnector

Events Tasks Directives Status All

+ Create new category

Name	Tenant	System name	Form template
General	Shiftconnector		Default

Work instructions

Status Active

Type Directives

Tenant Shiftconnector

Name Work instructions

Form template Default

Signatures - Deviation

- Use name of form template
- Name Signatures
- Use defaults of form template
- Copy value from parent element
- Use validation rules of form template
- Is mandatory
- Only editable in creation mode
- Is read only field
- Allow multi selection

Assign to structure item

Infoboard	✕
Line 1	✕

Indicate that for this category the "signatures" is mandatory.

Add shift books in which this category should be visible.

A user has locked a dataset.
How do you proceed?

Manage locks

Delete locks

User → Manage Locks → delete lock

The screenshot shows the 'Manage Locks' interface in SHIFTCONNECTOR io. The interface includes a sidebar with navigation options like 'Infoboard', 'Shift Supervisor', 'Line 1-4', 'Morning Meeting', 'Search', and 'Tool Improvements'. The main content area displays a table of locks. The table has the following columns: Lock Type, Lock time, Tenant, Structure Item / Module, and Name. A red box highlights the delete icons (X) in the rightmost column of the table.

Lock Type	Lock time	Tenant	Structure Item / Module	Name	
Administration	17.06.2019 15:49		AD_SC7_User_UserData	Andreas Eschbach	X
Administration	17.06.2019 15:49		AD_SC7_SignatureReasonAssignments	Andreas Eschbach	X
Administration	17.06.2019 15:49		AD_SC7_TenantGroupAssignments	Andreas Eschbach	X
Administration	17.06.2019 15:49		AD_SC7_TeamAssignments	Andreas Eschbach	X
Administration	17.06.2019 15:49		AD_SC7_User_DefaultStartSettings	Andreas Eschbach	X
Administration	17.06.2019 15:49		AD_SC7_User	Andreas Eschbach	X

Exercise 6a (Basic)

From: dennis.brueggerhoff@company.com
To: admin@company.com
Subject: HELP!!!!!!

Admin-Team,

An Event in Line 1 is locked since a long time by Emma Anderson

Please unlock!

Dennis Bruemmerhoff

Entry locked

The entry is already locked.
Emma Anderson ()
Lock Time: Mon, 06-17-2019 15:55

OK

Solution Exercise 6a

SHIFTCONNECTOR[®] io

This is a test system. All entries will be deleted soon!

Manage Locks

Tenant: Shiftconnector Lock Type: All

Lock Type	Lock time	Tenant	Structure Item / Module	Name	
Administration	06.09.2019 08:41	Shiftconnector	AD_SC7_ManageLists	Andreas Eschbach	✘
Administration	05.09.2019 11:46	Shiftconnector	AD_SC7_ManageTabs	Isabella Baker	✘
Administration	05.09.2019 11:46	Shiftconnector	AD_SC7_ManageTenantSecurity	Isabella Baker	✘
Administration	05.09.2019 11:46	Shiftconnector	AD_SC7_ManageTenantBasic	Isabella Baker	✘
Administration	05.09.2019 11:46	Shiftconnector	AD_SC7_ManageTenantStartupinfos	Isabella Baker	✘
Administration	05.09.2019 11:46	Shiftconnector	AD_SC7_ManageStructureItems	Isabella Baker	✘
Events	05.09.2019 11:44	Shiftconnector	Line 1	Emma Anderson	✘

Infoboard

Shift Supervisor

Line 1

Line 2

Line 3

Line 4

Morning Meeting

Search

Tool improvements

MY MAILBOX

nothing to sign

no tasks

Andreas Eschbach

Delete the lock

Exercise 6b (Expert)

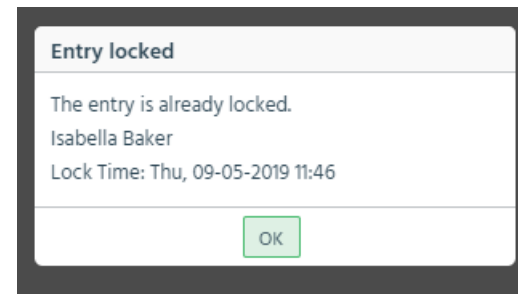
From: andreas.eschbach@company.com
To: admin@company.com
Subject: Global permissions cannot be adjusted

Hello Admin-Team,

When I try to adjust the global permissions within the organizational register I always receive the message.

Ms. Baker is not available right now.
Could someone please unlock it?

With kind regards
Andreas Eschbach



Solution Exercise 6b

SHIFTCONNECTOR^{io}

This is a test system. All entries will be deleted soon!

Manage Locks

Tenant: Shiftconnector Lock Type: All

Lock Type	Lock time	Tenant	Structure Item / Module	Name	
Administration	06.09.2019 08:41	Shiftconnector	AD_SC7_ManageLists	Andreas Eschbach	✕
Administration	05.09.2019 11:46	Shiftconnector	AD_SC7_ManageTabs	Isabella Baker	✕
Administration	05.09.2019 11:46	Shiftconnector	AD_SC7_ManageTenantSecurity	Isabella Baker	✕
Administration	05.09.2019 11:46	Shiftconnector	AD_SC7_ManageTenantBasic	Isabella Baker	✕
Administration	05.09.2019 11:46	Shiftconnector	AD_SC7_ManageTenantStartupinformati	Isabella Baker	✕
Administration	05.09.2019 11:46	Shiftconnector	AD_SC7_ManageStructureItems	Isabella Baker	✕
Events	05.09.2019 11:44	Shiftconnector	Line 1	Emma Anderson	✕

Delete the lock

Infoboard
Shift Supervisor
Line 1
Line 2
Line 3
Line 4
Morning Meeting
Search
Tool Improvements
MY MAILBOX
nothing to sign
no tasks

Andreas Eschbach

One of your departments needs a new structure item for
Line 5

How do you proceed?

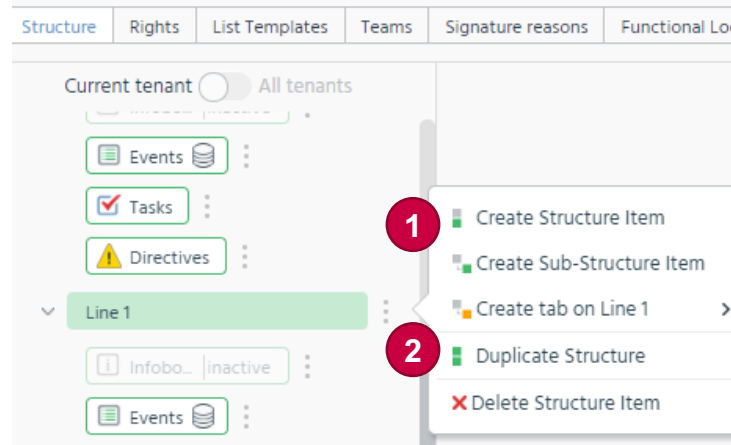
Organizational Register

Create structure item

Organizational register → Structure

- 1 Create new structure item
- 2 Clone existing structure item

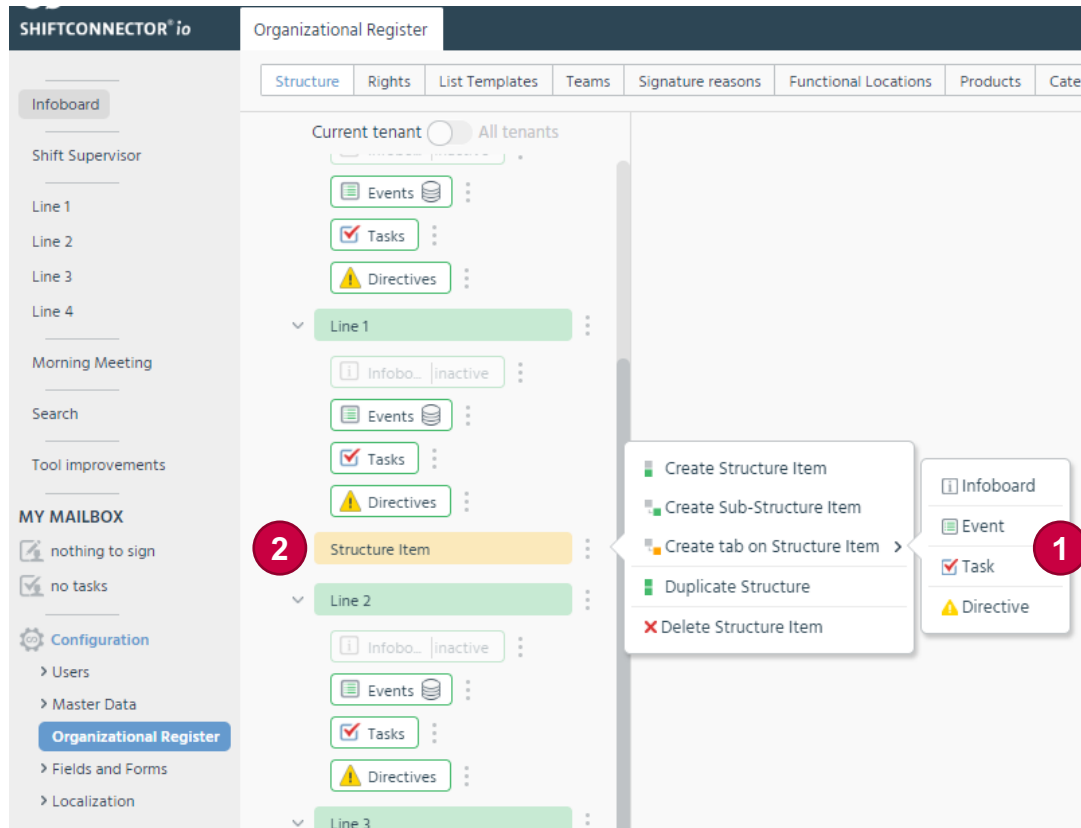
Important: is a structure item cloned, all the configuration will be duplicated too



Create new tab

1 Create tab (Event, Task or Instruction) under the new created structure item

2



Create shiftbook

Create a shiftbook for tab Events

SHIFTCONECTOR[®] io Organizational Register

Structure Rights List Templates Teams Signature reasons Functional Locations Products Categories

Save & close Cancel

Current tenant All tenants

Events Tasks Directives

Line 1

Line 2

Line 3

Line 4

Morning Meeting

Search

Tool improvements

MY MAILBOX

nothing to sign

no tasks

Configuration

Users

Master Data

Organizational Register

Fields and Forms

Tab - Events

Global \ Shiftconnector \ Structure Item \ Events

Icon Name Status

Use default name Events Active

Shiftbook(s)

+ Create new Shiftbook

Name	Status	Create auto events for:
	Active	<input type="checkbox"/> Events <input type="checkbox"/> Tasks <input type="checkbox"/> Directives

Name is required

Shortlist(s)

Show shortlist of

None

OK Cancel

Adjust permissions

- 1 Select workspace or tab
- 2 Assign groups (only appears in edit mode)
- 3 Adjust access permissions

The screenshot displays the 'Organizational Register' interface in the SHIFTCONNECTOR io application. The main content area is titled 'Rights - Events' and shows a table of permissions for 'Global \ Shiftconnector \ Line 1 \ Events'. The table has columns for 'Description', 'Name', and three user groups: 'Global Administr...', 'KeyUser', and 'StandardUser'. The 'Global Administr...' group is highlighted with a red box labeled '3'. The 'Groups' panel on the right, labeled '2', shows the 'Global Administrator', 'KeyUser', and 'StandardUser' groups selected. The left sidebar, labeled '1', shows the 'Line 1' workspace selected under the 'Shift Supervisor' category.

Description ^	Name	Global Administr... X	KeyUser X	StandardUser X
Attach events or select non-origin shiftboo...	SB_EventAssignTo	Click to configure (Create)	Click to configure (Create)	Click to configure (Create)
Change signed records	SB_CanChangeSignedRecords	no <input type="radio"/> yes <input checked="" type="radio"/>	no <input type="radio"/> yes <input type="radio"/>	no <input type="radio"/> yes <input type="radio"/>
Event rights	SB_EventBasic	Delete	Create	Create
ListTreeStatusFlagEvent	SB_ListTreeStatusFlagEvent	Update	Nothing	Nothing
Show buttons in lists for attaching events	SB_ListTreeAddEvent	Click to configure (Read)	Click to configure (Read)	Click to configure (Read)
Show shift handover button	SB_EventHandOver	Click to configure (Create)	Click to configure (Create)	Click to configure (Create)
Sign multiple events	WC_SignMultipleRecordsEvents	Click to configure (Nothing)	Click to configure (Nothing)	Click to configure (Nothing)

Assign teams to workspaces

Organizational Register → Teams → **1** select workspace → assign **2** teams

The screenshot displays the SHIFTCONNECTOR io Organizational Register interface. The left sidebar contains navigation options such as 'Infoboard', 'Shift Supervisor', 'Line 1-4', 'Morning Meeting', 'Search', 'Tool improvements', and 'MY MAILBOX'. The main content area is titled 'Organizational Register' and includes tabs for 'Structure', 'Rights', 'List Templates', 'Teams', 'Signature reasons', 'Functional Locations', 'Products', and 'Categories'. The 'Teams' tab is active, showing a tree view of the organizational structure. A red box highlights 'Line 3' under the 'Shiftconnector' folder, with a red circle containing the number '1' next to it. The right pane shows 'Teams - Line 3' with a search bar containing 'Shift c'. A red box highlights a list of teams on the right side of the interface, with a red circle containing the number '2' below it. The list includes 'Administration', 'Maintenance', 'Shift A', 'Shift B', 'Shift C', and 'Shift D'. The interface also features a top navigation bar with the user's name 'Andreas Eschbach' and a 'Save & close' button.

Assign functional locations to workspaces

Organizational Register → Functional Locations → **1** select workspace → assign **2** functional location to workspace

The screenshot displays the SHIFTCONNECTOR io Organizational Register interface. The left sidebar contains navigation options such as 'Infoboard', 'Shift Supervisor', 'Line 1-4', 'Morning Meeting', 'Search', 'Tool Improvements', 'MY MAILBOX', and 'Configuration'. The main area is titled 'Organizational Register' and includes tabs for 'Structure', 'Rights', 'List Templates', 'Teams', 'Signature reasons', 'Functional Locations', 'Products', and 'Categories'. The 'Functional Locations' tab is active, showing a tree view for 'Global \ Shiftconnector \ Line 1'. A red box labeled '1' highlights the 'Line 1' item in the left sidebar. Another red box labeled '2' highlights the 'L1' item in the tree view, which is expanded to show sub-items: 'R101', 'R102', 'T4788', 'Z2626', 'L2', 'L3', 'L4', 'L5', and 'L6'. The interface also features a search bar, 'Save & close', 'Cancel', 'OK', and 'Cancel' buttons.

Assign categories to workspaces

Organizational Register → Categories → **1** select tab → **2** assign categorie to tab
→ **3** select categories that should be available → **4** select default category

The screenshot shows the SHIFTCONNECTOR io Organizational Register interface. The 'Categories' tab is selected, displaying the 'Categories - Events' configuration screen. The interface includes a sidebar with a tree view of organizational lines, a main content area with tabs for Structure, Rights, List Templates, Teams, Signature reasons, Functional Locations, Products, and Categories. The 'Categories' tab is active, showing a list of categories for 'Events' with checkboxes for selection and form templates. A table on the right allows for assigning categories to specific tabs, with columns for 'Visible in form' and 'Default category'. Red circles and boxes highlight the steps: 1. Selecting the 'Events' tab in the sidebar; 2. Selecting the 'Info' and 'Production' categories; 3. Checking the 'Visible in form' checkbox for the 'Info' category; 4. Checking the 'Default category' checkbox for the 'Info' category.

You want to adjust the List Templates to show all fields within the overview.

How is that possible?

List Templates

Adjust list templates

Organizational Register → List Template → **1** Select tab

→ **+ Create new list template**

2 Edit list template →

select **3** default template per tab

The screenshot displays the SHIFTCONECTOR io Organizational Register interface. The left sidebar shows a navigation menu with 'Events' highlighted under 'Line 1', marked with a red circle '1'. The main content area is titled 'List Templates - Events' and shows a configuration form for a list template. The form includes a 'Name' field with the value 'List Template name', a 'Main filter' dropdown set to 'Current shiftbook', and a 'Layout definition' dropdown set to '<New>'. A red circle '2' highlights the 'Defined on Line 1' section. A red circle '3' highlights a green checkmark icon in the top right corner of the configuration form. Below the form, there are checkboxes for 'Changeable ad-hoc filter' (checked), 'Filter open by default', 'Shiftbook grouping by default', and 'Show grouping by shiftbook selection'. The interface also shows a 'Save & close' button and a 'Cancel' button in the top right corner.

Create column layout

Create new layout definition → [+add column](#) → **1** Adjust width

→ **2** Adjust position by Drag & Drop

Layout definition Save Cancel

Default improvement_suggestions Overview

Name: Default [+ Add column](#) **1**

Name	Grouping	Default Grouping	Ad hoc filter	Visible	Width	Sorting	
Start/End or Open (Event.StartAndEndDateTimeOr...	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	100	Descending	✖
Functional Location (FunctionalLocationPathAndNa...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	100	None	✖
Functional Location (FunctionalLocationName)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	100	None	✖
Category (Category)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	100	None	✖
Description (SummaryDescription)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	350	None	✖
Created/Modified by (CreationUser_LastEditUser_29... 394c-44e1-a2ea-4b0799ba04de)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	70	None	✖
Attachment (AttachmentAvailable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	30	None	✖
Priority (Event.Status)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	50	None	✖

2

[+ Create new layout definition](#)

Create column layout

→ + [Add filter](#)

→ Search for filter

The screenshot displays a software interface for configuring a list template. A 'Select filter' dialog box is open, showing a list of filters. The search bar at the bottom of the dialog contains the text 'statu'. The filters listed are:

- Personal Status (PersonalTask.Status)
- Personal task of current user accomplished (PersonalTaskStatusCurrentUser)
- Priority (Event.Status)
- Signature Status Current User (SignatureStatusCurrentUser)
- Signature Status Overall (SignatureStatusOverall)
- Status (Directive.Status)

The background interface shows a list template configuration screen. The 'Name' field is set to 'Open', and the 'Main filter' dropdown is set to 'Current structure item'. The 'Layout definition' dropdown is set to 'default'. There are also checkboxes for 'Shiftbook grouping by default' and 'Show grouping by shiftbook selection'.

Exercise 7a (Basic)

From: melanie.bendel@company.com

To: admin@company.com

Subject: New line 5

Hi Admin,

We need within the navigation an additional Line 5. This line has to be almost identical to all other lines

Differences are:

- Instructions are not needed
- at events only the “Info” category is needed
- The functional location “Fire Alert System” should be set as default

All the best
Melanie

Solution Exercise 7a

The screenshot displays the SHIFTCONECTOR io Organizational Register interface. The main content area shows a tree view of organizational structure under 'Current tenant'. The 'Line 1' item is selected, and a context menu is open over it. The menu options are: 'Create Structure Item', 'Create Sub-Structure Item', 'Create tab on Line 1', 'Duplicate Structure', and 'Delete Structure Item'. The 'Duplicate Structure' option is highlighted with a red box. A red callout box points to this option with the text: 'Copy an existing structure item so that all important settings are correct'. The right-hand pane shows the details for 'Structure Item - Line 1', including its name, status (Active), and a checked 'Show separation line' option.

Solution Exercise 7a

SHIFTCONECTOR[®] io

Organizational Register

Structure Rights List Templates Teams Signature reasons Functional Locations Categories

Current tenant All tenants

Global

Shiftconnector

Infoboard

Shift Supervisor

Line 1

Line 2

Line 3

Line 4

Morning Meeting

Search

Tool improvements

MY MAILBOX

nothing to sign

no tasks

Configuration

Users

Master Data

Organizational Register

Fields and Forms

Localization

Structure Item - Line 5

Name Line 5 Status Active

Show separation line

Copy of Line 11

Rename the structural element and its shift book to "Line 5"

Remove hack if there does not have to be a line above the structure item

Organizational Register

Structure Rights List Templates Teams Signature reasons Functional Locations Categories

Current tenant All tenants

Global

Shiftconnector

Infoboard

Shift Supervisor

Line 1

Line 5

Tab - Events

Global \ Shiftconnector \ Line 5 \ Events

Icon Use default name Name Events Status Active

Shiftbook(s)

+ Create new Shiftbook

Name Line 5 Status Active Create auto events for: Events Tasks Directives

Shortlist(s)

Show shortlist of None

Rename the structural element and its shift book to "Line 5"

Remove hack if there does not have to be a line above the structure item

Solution Exercise 7a

The screenshot displays the 'Organizational Register' interface. On the left, a tree view shows 'Line 5' selected, with its 'Instruction' icon highlighted by a red box. The main panel shows the configuration for 'Tab - Instruction' (Global \ Shiftconnector \ Line 5 \ Instruction). The 'Status' dropdown menu is set to 'Inactive' and is also highlighted by a red box. A red callout box points to this dropdown with the text: 'Set instructions to inactive so that they are not displayed.'

Solution Exercise 7a

Organizational Register | Andreas Eschbach

Structure | Rights | List Templates | Teams | Signature reasons | Functional Locations | Categories

Save & close | Cancel

Current tenant: All tenants

Line 2: Events, Tasks, Instruction

Line 3: Events, Tasks, Instruction

Line 4: Events, Tasks, Instruction

Line 5: Events, Tasks

Categories - Events

Global \ Shiftconnector \ Line 5 \ Events

Select/Deselect all

Selected categories ^

		Visible in form	Default category
<input type="checkbox"/> Failure	Form template: Failure	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Fire Alert System	Form template: Default	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Info	Form template: Default System name: info	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> SHE	Form template: SHE	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Tool improvements	Form template: Tool_improvements	<input type="checkbox"/>	<input type="checkbox"/>

OK | Cancel

Select the categories that should be available there

Check Default, since only one category should be available anyway

Solution Exercise 7a

 A' and '> Fire alert system'. On the right side of the main content area are 'OK' and 'Cancel' buttons. The left sidebar shows a tree view with 'Global' and 'Shiftconnector' expanded. Under 'Shiftconnector', there are items: 'Infoboard', 'Shift Supervisor', 'Line 1', 'Line 2', 'Line 3', 'Line 4', 'Line 5' (highlighted), 'Morning Meeting', 'Search', and 'Tool improvements'."/>

Organizational Register

Andreas Eschbach

Structure Rights List Templates Teams Signature reasons **Functional Locations** Categories

Save & close Cancel

Current tenant All tenants

Global

Shiftconnector

Infoboard

Shift Supervisor

Line 1

Line 2

Line 3

Line 4

Line 5

Morning Meeting

Search

Tool improvements

Functional Locations - Line 5
Global \ Shiftconnector \ Line 5

Search...

> A

> Fire alert system

OK Cancel

Select the functional locations as favourites so that only these are displayed

Exercise 7b (Basic)

From: melanie.bendel@company.com

To: admin@company.com

Subject: RE: new Line 5

Hi Admin,

Thank you for adding the Line 5. Unfortunately we do not see any high priority events in our morning meeting.

Could you please take care?

Thank you
Melanie

The screenshot shows a dashboard for Shift Connector. At the top, there are three status indicators: 'Events 0', 'Tasks 0', and 'Directives 0'. Below this is a 'Show:' filter set to 'last 24 hours' and a 'List filter' button. The main content area has a '+ Add Event' button and a 'Handover' icon. Below these are five expandable sections: '> Shift Supervisor 0', '> Line 1 0', '> Line 2 0', '> Line 3 0', and '> Line 4 0'. Each section shows a right-pointing chevron and a zero count in a circle.

Solution Exercise 7b

The screenshot shows the 'List Templates - Events' configuration page in Shiftconnector. A modal dialog titled 'Manage main filters' is open, displaying a list of filters. The 'main filter all' filter is selected. A red box highlights 'Line 5' in the list, and a callout bubble points to it with the text 'Add line 5 to the main filter'. The background interface shows various list templates and their configurations.

Solution Exercise 7b

The screenshot shows the 'Organizational Register' interface with the 'List Templates - Tasks' configuration page. A 'Manage main filters' dialog box is open, showing a list of filters. The 'main filter all' filter is selected, and its configuration shows 'Line 5' checked. A red callout box points to 'Line 5' with the text 'The same also for the tasks and instructions'.

Organizational Register

Structure Rights List Templates Teams Signature reasons Functional Locations Categories

Current tenant All tenants

Line 2

Events

Tasks

Instruction

Line 3

Events

Tasks

Instruction

Line 4

Events

Tasks

Instruction

Line 5

Events

Tasks

Instruction

Morning Meeting

Events

Tasks

Instruction

Search

Events

Tasks

List Templates - Tasks

Global \ Shiftconnector \ Morning Meeting \ Tasks Standard list: Open

+ Create new list template + Create new cross tenant list template

Defined on Morning Meeting

Name Open

+ Add filter

Changeable ad-hoc filter

Name Overdue

+ Add filter

Changeable ad-hoc filter

Name Done

+ Add filter

Status

Changeable ad-hoc filter Filter open by default Shiftbook grouping by default Show grouping by shiftbook selection

Name All Main filter main filter all Layout definition default

Manage main filters

main filter all

Name main filter all

Infoboard

Shift Supervisor

Line 1

Line 2

Line 3

Line 4

Line 5

Morning Meeting

Search

Tool improvements

Save Cancel

The same also for the tasks and instructions

Exercise 7c (Expert)

From: melanie.bendel@company.com
To: admin@company.com
Subject: Separat structure item "Maintenance"

Hi Admin,

Our maintenance team needs a navigation item separately.
In this item, all Tasks should be displayed first. Secondly the event tab.
Additionally we need a task category for maintenance.
A maintenance task should be creatable from all lines.
Within the maintenance structure item, all the tasks should be summarized and then processed.

Thanks
Melanie

Solution Exercise 7c

The screenshot shows the 'Organizational Register' interface. At the top, there are tabs for 'Structure', 'Rights', 'List Templates', 'Teams', 'Signature reasons', 'Functional Locations', and 'Categories'. Below the tabs, there are radio buttons for 'Current tenant' and 'All tenants'. The main area displays a hierarchical tree structure:

- Global
 - Shiftconnector
 - Infoboard
 - Infoboard
 - Shift Supervisor
 - Events
 - Tasks
 - Instruction
 - Line 1
 - Events
 - Tasks
 - Instruction
 - Line 2

A context menu is open over 'Line 1', with the 'Duplicate Structure' option highlighted. The menu items are:

- Create Structure Item
- Create Sub-Structure Item
- Create tab on Line 1
- Duplicate Structure
- Delete Structure Item

Copy an existing structure item so that all important settings are correct

Solution Exercise 7c

Organizational Register

Structure Rights List Templates Teams Signature reasons Functional Locations Categories

Current tenant All tenants

Global

Shiftconnector

Infoboard

Shift Supervisor

Line 1

Copy of Line 11

Structure Item - Maintenance

Name: Maintenance

Status: Active

Show separation line

Renaming the structure item to "Maintenance"

Organizational Register

Structure Rights List Templates Teams Signature reasons Functional Locations Categories

Current tenant All tenants

Global

Shiftconnector

Infoboard

Shift Supervisor

Line 1

Maintenance

Tab - Events

Global \ Shiftconnector \ Maintenance \ Events

Icon: Use default name

Name: Events

Status: Active

Shiftbook(s)

+ Create new Shiftbook

Name: Maintenance

Status: Active

Create auto events for: Events Tasks Directives

Shortlist(s)

Show shortlist of: None

Solution Exercise 7c

Organizational Register

Structure Rights List Templates Teams Signature reasons Functional Locations Categories

Current tenant All tenants

- Global
 - Shiftconnector
 - Infoboard
 - Infoboard
 - Shift Supervisor
 - Events
 - Tasks
 - Instruction
 - Line 1
 - Events
 - Tasks
 - Instruction
 - Maintenance
 - Tasks
 - Events
 - Instruction
 - Line 2
 - Events

Changing tasks and instructions

Organizational Register

Structure Rights List Templates Teams Signature reasons Functional Locations Categories

Current tenant All tenants

Tab - Instruction

Global \ Shiftconnector \ Maintenance \ Instruction

Icon Use default name Name Status

Set instructions to inactive so that they are not displayed

Solution Exercise 7c

The screenshot shows the 'Organizational Register' interface. At the top, there are tabs for 'Structure', 'Rights', 'List Templates', 'Teams', and 'Signature'. Below the tabs, there are radio buttons for 'Current tenant' and 'All tenants'. The main area displays a hierarchical list of organizational lines: 'Events', 'Tasks', 'Instruction', 'Line 3', 'Line 4', 'Line 5', 'Maintenance', and 'Morning Meeting'. Each line has associated icons for 'Events', 'Tasks', and 'Instruction'. The 'Maintenance' line is highlighted with a red box, and a red callout points to it with the text 'New shift book in the right place'. On the right side, there is a 'Struc' panel with 'Global \', 'Name', 'Main', and a checked 'Sh' checkbox.

Solution Exercise 7c

The screenshot shows the 'Categories' management page in Shiftconnector. The 'Tasks' tab is selected. A table lists a category named 'General' for tenant 'Shiftconnector' with form template 'Default'. A 'Maintenance' modal is open, showing fields for Name, Form template, and Fields Setting. A dialog 'Assign to structure item' is also open, showing a list of lines (Line 1 to Line 5) with checkboxes. Annotations 1-4 point to specific elements: 1 points to the 'Tasks' tab, 2 to the 'Name' field, 3 to the 'Form template' field, and 4 to the 'Assign to structure item' dialog.

Enter what the category is called and which form this category should use.

Select that this category should be visible in all lines.

Solution Exercise 7c

Organizational Register

Structure Rights **List Templates** Teams Signature reasons Functional Locations Categories

Current tenant All tenants

Line 3
Events
Tasks
Instruction

Line 4
Events
Tasks
Instruction

Line 5
Events
Tasks

Maintenance
Tasks
Events

Morning Meeting
Events
Tasks
Instruction

Search
Events
Tasks
Instruction

List Templates - Tasks
Global \ Shiftconnector \ Maintenance \ Tasks Standard list: Overdue

+ Create new list template + Create new cross tenant list template

Defined on Maintenance
 no yes Inherit from tenant

Inherited from Shiftconnector

Name: Planned Main filter: main filter all Layout definition: default
Filters: Status: [purple] [x]
 Changeable ad-hoc filter Filter open by default Shiftbook grouping by default Show grouping by shiftbook selection

Name: Open Main filter: main filter all Layout definition: default
Filters: Status: [yellow] [red] [blue] [orange] [x]
 Changeable ad-hoc filter Filter open by default Shiftbook grouping by default Show grouping by shiftbook selection

Name: Overdue Main filter: main filter all Layout definition: default
Filters: Status: [red] [orange] [x]
 Changeable ad-hoc filter Filter open by default Shiftbook grouping by default Show grouping by shiftbook selection

Solution Exercise 7c

The screenshot shows the 'Organizational Register' application interface. The main window is titled 'List Templates - Tasks' and is set to 'Standard list: Planned'. A red callout bubble with the text 'Create new filters' points to the configuration area. The configuration area is divided into sections for different filters. The first section, 'Planned', is highlighted with a red box and contains the following fields: Name (Planned), Main filter (Current structure item), and Layout definition (default). Below these fields are several checkboxes: 'Changeable ad-hoc filter' (checked), 'Filter open by default', 'Shiftbook grouping by default', and 'Show grouping by shiftbook selection'. The second and third sections, 'List Template name', are partially visible and show 'Name is required' and 'Selection is required' error messages. The interface also includes a left sidebar with a tree view of organizational lines (Line 3, Line 4, Line 5, Maintenance, Morning Meeting, Search, Tool improvements) and a top navigation bar with tabs for Structure, Rights, List Templates, Teams, Signature reasons, Functional Locations, and Categories.

Solution Exercise 7c

Organizational Register Andreas Eschbach

Structure Rights List Templates Teams Signature reasons Functional Locations Categories

Current tenant All tenants

Line 3
Events
Tasks
Instruction

Line 4
Events
Tasks
Instruction

Line 5
Events
Tasks
Instruction

Maintenance
Tasks
Events
Instruction

Morning Meeting
Events
Tasks
Instruction

Search
Events
Tasks
Instruction

Tool improvements
Events
Tasks
Instruction

List Templates - Tasks

Global \ Shiftconnector \ Maintenance \ Tasks Standard list: Planned

[+ Create new list template](#) [+ Create new cross tenant list template](#)

Defined on Maintenance

Name	Main filter	Layout definition
Planned	Current structure item	default

+ Add filter Status ● x

Changeable ad-hoc filter Filter open by default Shiftbook grouping by default Show grouping by shiftbook selection

Name	Main filter	Layout definition
Open	Current structure item	default

+ Add filter Status ● ● ● ● x

Changeable ad-hoc filter Filter open by default Shiftbook grouping by default Show grouping by shiftbook selection

Name	Main filter	Layout definition
Overdue	Current structure item	default

+ Add filter Status ● ● x

Changeable ad-hoc filter Filter open by default Shiftbook grouping by default Show grouping by shiftbook selection

Name	Main filter	Layout definition
Done	Current structure item	default

+ Add filter Status ● x

OK Cancel

Solution Exercise 7c

Organizational Register

Structure Rights List Templates Teams Signature reasons Functional Locations Categories

Current tenant All tenants

Line 3

Events

Tasks

Instruction

Line 4

Events

Tasks

Instruction

Line 5

Events

Tasks

Instruction

Maintenance

Tasks

Events

Morning Meeting

Events

Tasks

Instruction

Search

Events

Tasks

List Templates - Tasks

Global \ Shiftconnector \ Maintenance \ Tasks Standard list: Planned

+ Create new list template + Create new cross tenant list template

Defined on Maintenance

Name

Planned

+ Add filter

Changeable

Name

Open

+ Add filter

Changeable

Name

Overdue

+ Add filter

status

Changeable ad-hoc filter Filter open by default Shiftbook grouping by default Show grouping by shiftbook selection

Name Main filter Layout definition

Manage main filters

Save Cancel

main filter all

Maintenance

Name

Maintenance

Infoboard

Shift Supervisor

Line 1

Line 2

Line 3

Line 4

Line 5

Maintenance

Morning Meeting

Search

Create a new task filter with all lines selected

Solution Exercise 7c

Organizational Register

Structure Rights List Templates Teams Signature reasons Functional Locations Categories

Current tenant: All tenants

Global \ Shiftconnector \ Maintenance \ Tasks Standard list: Open

List Templates - Tasks

Defined on Maintenance

Name: Planned Main filter: Maintenance Layout definition: overview

Name: Open Main filter: Maintenance Layout definition: overview

Name: Overdue Main filter: Maintenance Layout definition: overview

Name: Done Main filter: Maintenance Layout definition: overview

Selection of the newly created main filter and an overview layout

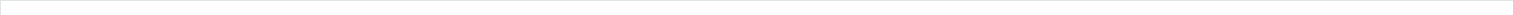
Hack at "Shiftbook grouping by default" so that by default it is grouped by shift book

Select "Open" as default so that all open are displayed

Solution Exercise 7c

- The same as was done before for tasks, is now also done for instructions

Additional information



Additional information

Shiftconnector.io Helpcenter:
<https://eschbach.zendesk.com>

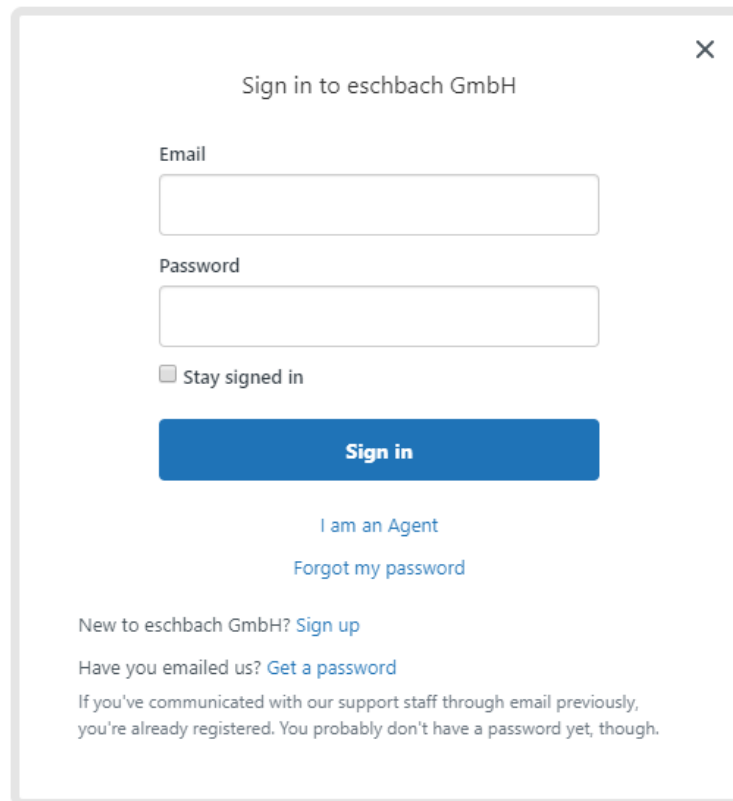
Here you can find a summary of configuration examples and guides.

Please send an informal email to support@eschbach.com to request your account. You should have the following information ready:

- Shiftconnector URL
- Company & plant

Helpcenter

- Open your Browser
- Go to this page: <https://eschbach.zendesk.com/hc/en-us/>



Sign in to eschbach GmbH

Email

Password

Stay signed in

Sign in

[I am an Agent](#)

[Forgot my password](#)

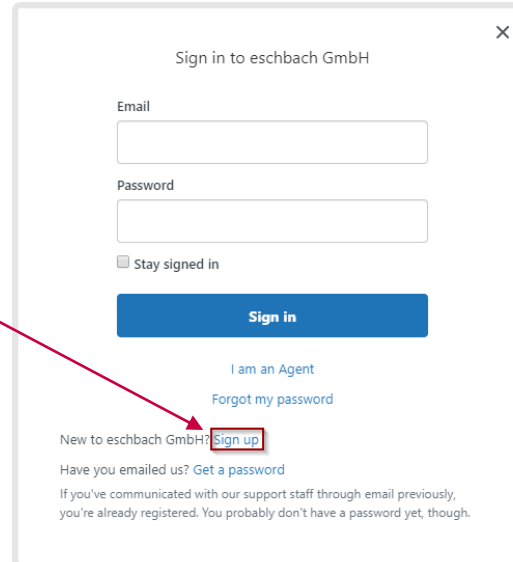
New to eschbach GmbH? [Sign up](#)

Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.

Helpcenter – No Account exist

- Click on „Sign up“
- Now enter your first, last name and your e-mail log in again



Sign in to eschbach GmbH

Email

Password

Stay signed in

[Sign in](#)

[I am an Agent](#)

[Forgot my password](#)

New to eschbach GmbH? [Sign up](#)

Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.

Helpcenter – No Account exist

- Afterwards you will receive a welcome e-mail
- There you have to confirm your e-mail and set a password
- You can then log in to the Helpcenter with your e-mail and your password

Additional information

Contact to the vendor:

eschbach GmbH

D-79713 Bad Säckingen

Phone: +49-7761-55959-0 info@eschbach.com

www.shiftconnector.com