

j5 User Manual

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www.sjsoft.com | info@sjsoft.com

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Chapter 1

Introduction

General

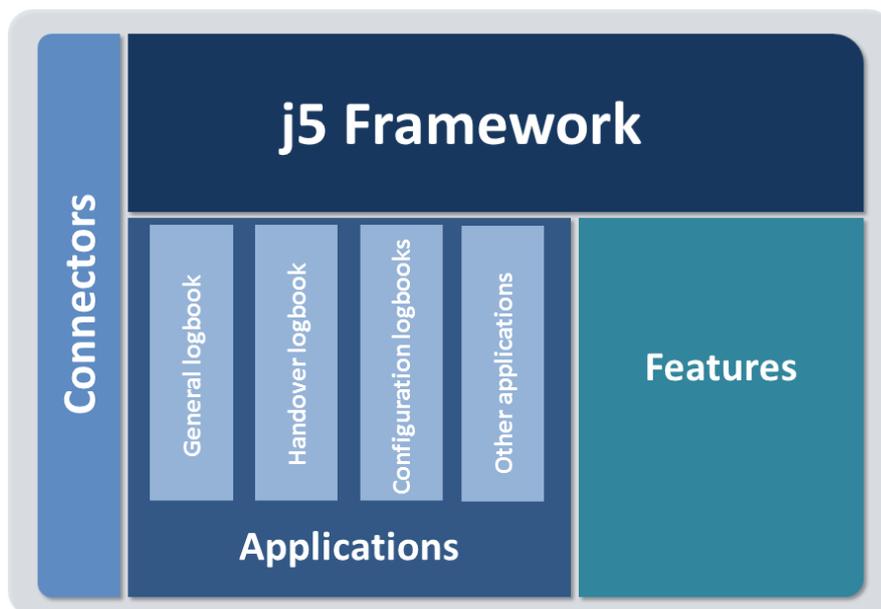
j5 is an extremely flexible and configurable software system. It is designed to have full functionality with the minimum amount of input whilst still allowing you to expand its capabilities as your needs grow.

This preface covers the following:

- About j5
- Additional Resources
- What is j5?
- How does j5 work?
- Advantages of j5
- About the j5 Documentation

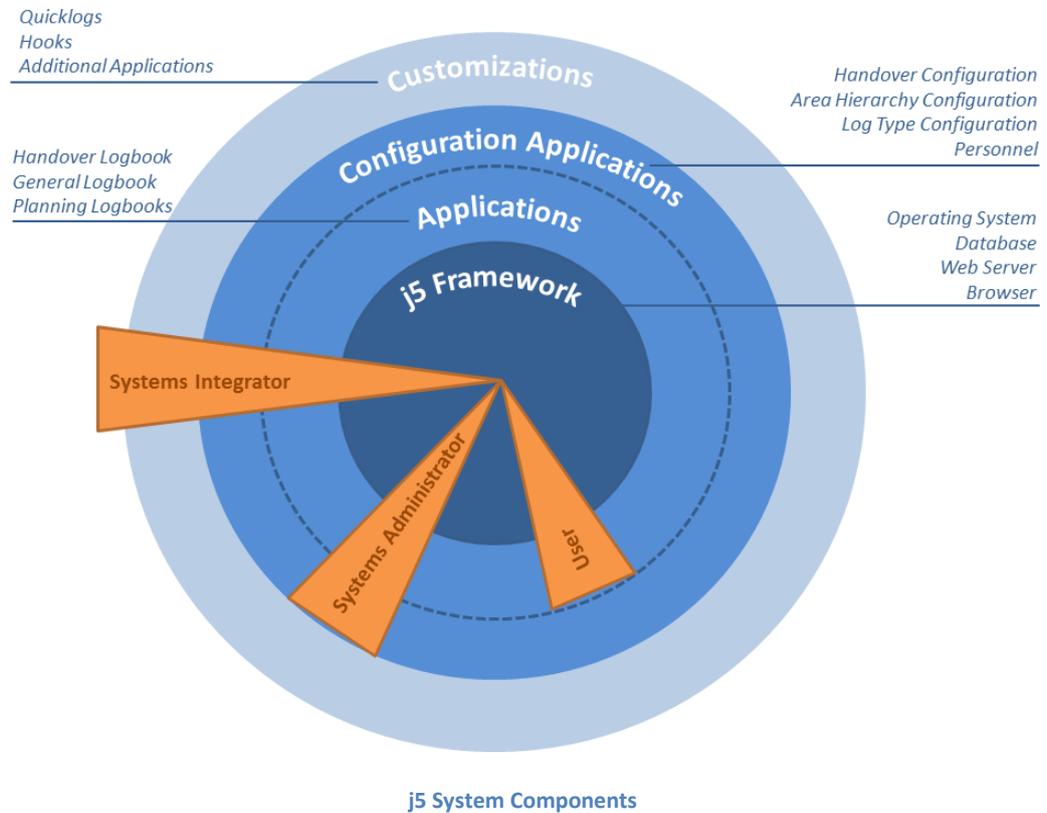
About j5

j5 is a fully integrated system designed to meet the needs of industrial sites. j5 supports a suite of different Applications, Features and Connectors which fit seamlessly into the j5 Framework and communicate with each other as and when required (see figure below). In addition, there are numerous support modules such as Configuration Modules and Administration Modules to ensure that the System is well managed and operates smoothly.



Overview of the j5 system

j5 can be divided into three main components: the j5 Framework, Applications (including the application configuration) and Customization. Users may be set up to have different levels of access to these components depending on their role, as can be seen in the diagram below.



What is j5?

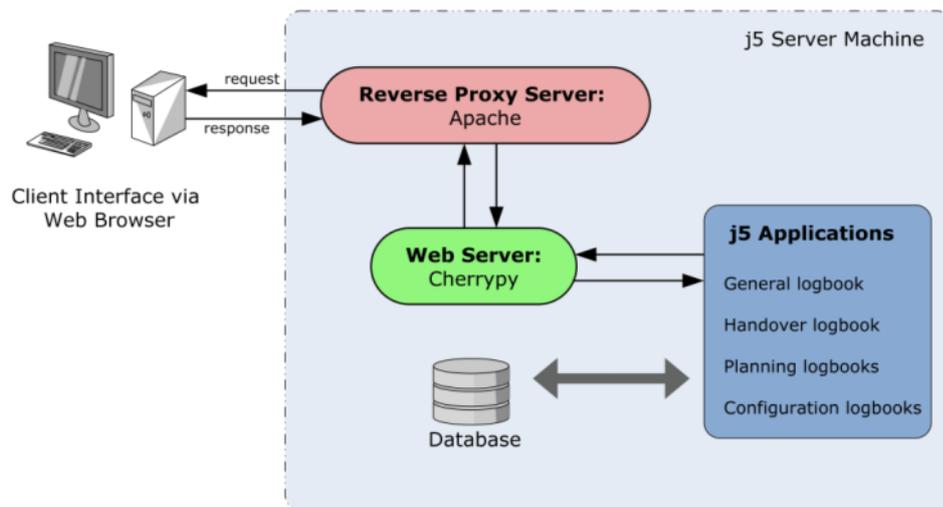
j5 is a collection of integrated web applications that log, organise and manage the operating processes of industrial sites. j5 collects and collates logs, work plans, reports and live data from the field, and makes this information instantly available across the site to all applicable users. j5 not only replaces the paper-based logbook or Excel spread sheet typically used in most control rooms or technical and maintenance workshops, but also integrates with your day-to-day operations, smoothly recording progress and feedback while you focus on the task at hand. j5 can be easily configured to meet almost every business requirement. The basic configuration includes the following functionality:

- Simple, day-to-day logging of events in the **Operator Logbook**.
- Clear handover of responsibility between shifts in the **Handover logbook**.
- Detailed tasks precisely defined and recorded in the **Work Overview Application** and **Ad-Hoc Work Application**.
- Various Configuration Applications.

How j5 works

Because j5 is web based and hosted on the intranet, users can access the system from any computer which has a web browser. The diagram below shows how a user on the Intranet gets information from the j5 Applications.

Initially a **systems administrator is responsible for the configuration of the logbooks and applications**. The systems administrator sets up the various fields and logbooks. The configuration information is then stored in the database for each of the applications.



Basic j5 Architecture

Whenever a user clicks on a link in the Browser on his or her screen:

- A request is sent to the main server asking for the relevant information for that user.
- The web server then transfers the request to the j5 Application. j5 then reads the configuration tables which define the layout of the form to be presented to the user. (For example: the order in which the logs are presented to the user is a parameter specified in the configuration tables.) j5 then creates the html information according to the format defined in the configuration tables.
- The j5 application then sends the information via the Web Server back to the user's browser. In the browser, the information is translated and displayed in the relevant form and grid.

In systems with a heavy load a front-end proxy server (such as Apache) is used to run the j5 server across multiple processes.

Whenever a user adds a new log, the information is stored, together with the categories associated with that log entry in the data tables. Additional system

categories such as the user name, shift number, date, time, etc. are also stored with the log information. The function of the j5 web server is to allow **many users to access the information simultaneously across the network.**

***Note:** The j5 application can handle many different configurations simultaneously. Standard applications are available, but system administrators may develop their own applications using the framework.*

Advantages of using j5

In contrast to the traditional paper-based logbook, j5 provides many advantages over the conventional form of recording logs.

For example:

- There is immediate corporate visibility to log entries made in any of the logbooks across the sites. As soon as an entry is made to a logbook, that information is available to all the consoles across the site and to authorized users off site.
- There is an immediate improvement in the coordination of operations since everyone is aware of the operations being undertaken.
- Entries to the logbooks are not limited to operators and may be made by any of the personnel in any of the areas of the site. For example, a maintenance manager can add an entry to the control room logbook if the repairs he is undertaking relates to that area.
- It becomes **very easy to find information in the logbooks** using the filtering and sorting tools.
- The **presentation of the logs is improved**. Instead of hand written logs, the information is sorted, ordered and displayed in color-coded form in a grid.
- It becomes much **easier to categorize the log information** so that the data entry is simpler making later analysis more meaningful. The administrator can set up log categories that the operator must choose from when adding a log. At a later stage, queries can be made against these categories.
- There is **password control for each user**. Users are allowed to see exactly what they need to see and no more. Each user may also be restricted if necessary so that they may not enter new logs, or modify existing logs or only enter logs in a certain area, or modify logs that have been in the system for a certain time.
- Logs may also be **printed out on any of the printers on the network**, which means that your users can have a hard copy of the logs without

having to go to the control room. Logs may also be exported to PDF, Excel or CSV formats.

- The latest logbook entries **may be viewed on the Intranet using standard browsers** like Firefox Chrome Safari or Internet explorer or. This means that anyone who has access to a browser on the Intranet can view the information without having to install any additional software.
- j5 uses standard databases and publishes the table structures. This means that **users may access the logs using any of the off-the-shelf query tools** that are available. With these tools, custom queries or custom reports may be generated.
- The system can **be configured for multiple applications** and tuned to a particular site's requirement.

About the j5 Documentation

j5 comes with various types of documentation in addition to this manual to help you get started providing detailed information about each application. There are four manuals, each covering different topics including installation, day-to-day use and advanced configuration. The manuals that are applicable to each user depends on their role.

The four documentation modules are listed below:

**You are
here**

- **j5 User Manual:** This manual describes day-to-day use of j5, such as logging, managing work and handovers and is applicable to all users.
- **j5 Installation and Maintenance Guide:** This guide describes how to install, manage and update the j5 system and is typically applicable to system administrators and system integrators.
- **j5 Configuration Manual:** This manual describes how to configure a j5 site from the front end and is applicable to system administrators and system integrators.
- **j5 Advanced Configuration Manual:** This manual describes all advanced configuration techniques and is only applicable to advanced system integrators.

Important

An understanding of the material in the j5 User Manual is assumed in the j5 configuration manuals.

Additional Resources

j5 Website

For general information and updates, as well as the latest news on j5, go to:

<http://www.sjsoft.com/>

St James Software Service and Support Websites

For software updates and answers to the most frequently asked questions for all St James Software products, go to the general Support webpage. You'll also have access to product specifications, reference documentation, and St James Software and third-party product technical articles.

<http://www.sjsoft.com/support>

For software updates, documentation, discussion forums, and answers to the most frequently asked questions for j5, go to:

<http://www.sjsoft.com/>

For discussion forums for all St James Software products from around the world, where you can search for an answer, post your question, or answer other users' questions, go to:

<http://osqa.sjsoft.com>

Chapter 2

Getting Started

Overview

This chapter covers the following:

- Logging in
- Navigation
- Adding, modifying and deleting logs
- Filtering
- Exporting logs

Logging in

To log in to j5, open your browser (e.g. Internet Explorer, Google Chrome or Mozilla Firefox). In the address bar, enter the address supplied by your system administrator. This address will take the form *http://<SERVERNAME>/* or *http://<SERVERNAME>:<PORT>/*. Alternatively, click on the j5 bookmark if this has been set up for you. The j5 login screen will appear and you may be required to enter your assigned username and password. If your system supports LDAP (your system administrator will advise you of this), then you should use your standard user name and password to log in (see figure below).



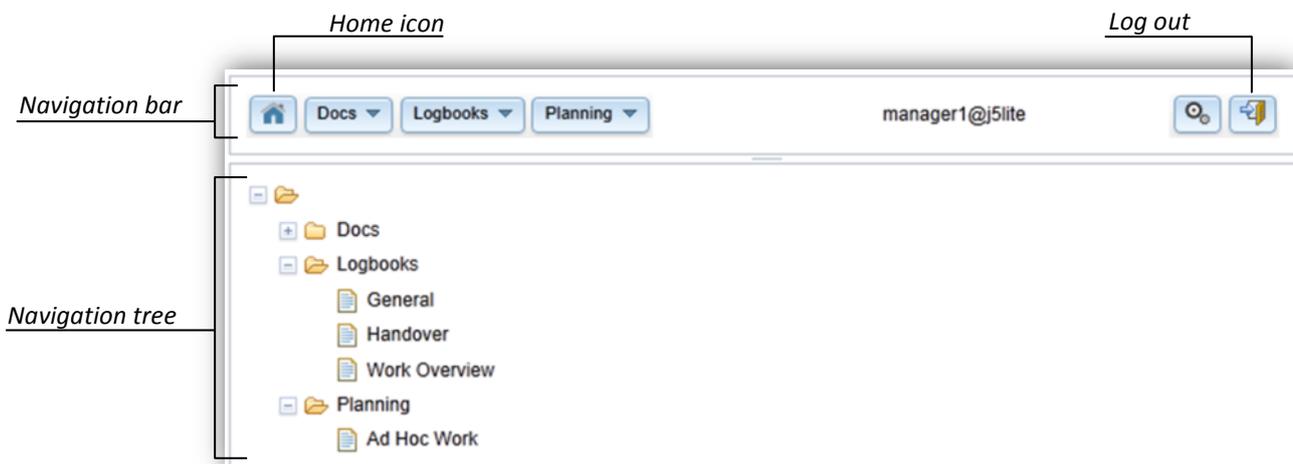
j5 Login Page

Your system may also support single sign-on authentication (SSO), in which case, you will automatically be logged in to j5. If you are unsure of your user name and password, then you should contact your system administrator to get this information. Once you have entered your user name and password and clicked on the login button, your browser will connect to j5 and your home screen will be visible.

Navigation

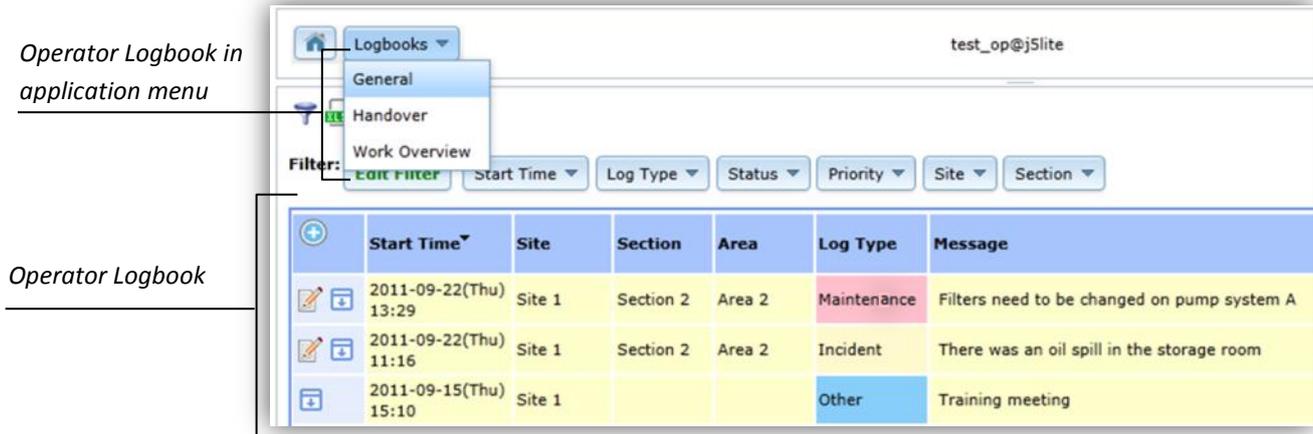
To find your way around j5, you will need to navigate with the menu and become familiar with how logs appear in the logbook. When you first log in you will see the navigation bar and the navigation tree, both of which can be used to browse through the j5 site. You can return to the home page at any time by simply clicking on the home icon. In the navigation bar you will see the documentation menu with links to all j5-related documentation. In addition there will be various other menus for the applications you have access to.

Note: Your home screen may differ slightly, depending on your individual user rights and which applications you have installed.

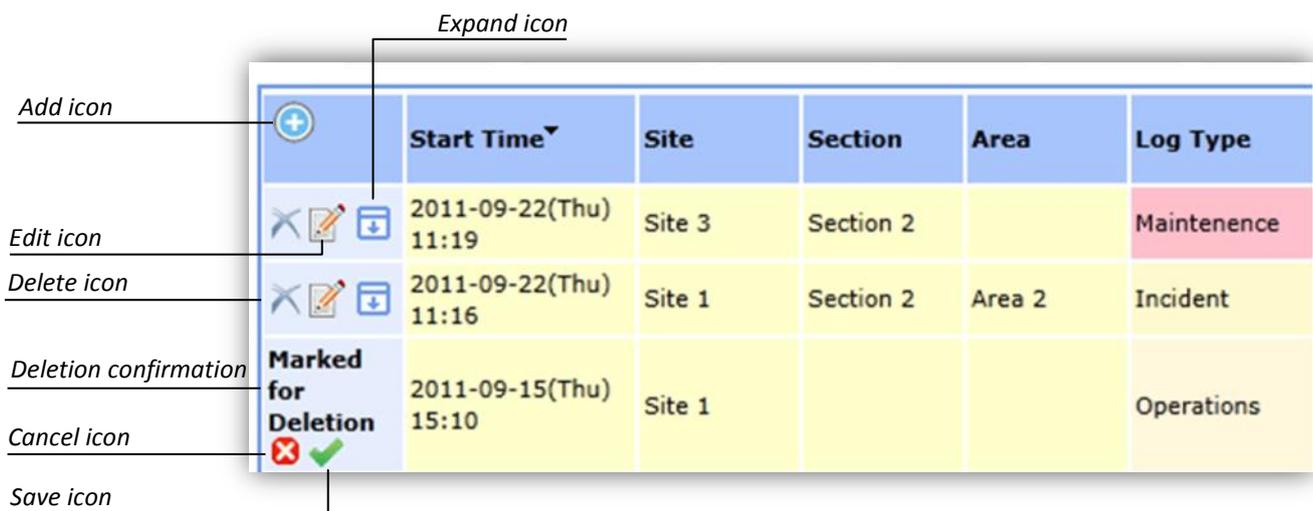


Adding, modifying and deleting logs

Once you are familiar with navigation in and around the home page, you will need to learn the basics of j5. We will use the Operator Logbook as an example, but these principles apply to any of the j5 applications. Firstly, select an Application (in this case, Operator Logbook, see the figure below) from the Logbooks option in either the drop down menu or the navigation tree. The logbook will load and a pre-configured view of the logs will be shown in the grid.



A standard series of action icons are available throughout the j5 site and allow you to perform various actions including Add, Edit, Delete, Save, Cancel and Expand. These icons are shown on the left-hand side of the grid.



Note: If the Add, Edit or Delete icons do not appear on a log, it means that you are not authorised to perform those actions on that particular log.

By default logs are displayed in a summary view (of only one line), however, you can expand the log to view more information by clicking on the expand icon. If you wish to return to the summary view, simply click on the collapse icon.

If you are authorised, you will be able to add new logs to the system. To add a new log, click on the Add icon. A new, blank log will open in edit mode and you can fill in all the necessary fields. Some fields are **required** fields therefore must be filled in before you can save the log. If any required fields are not filled in the system will prompt you to do so when you click the save button.

Filtering

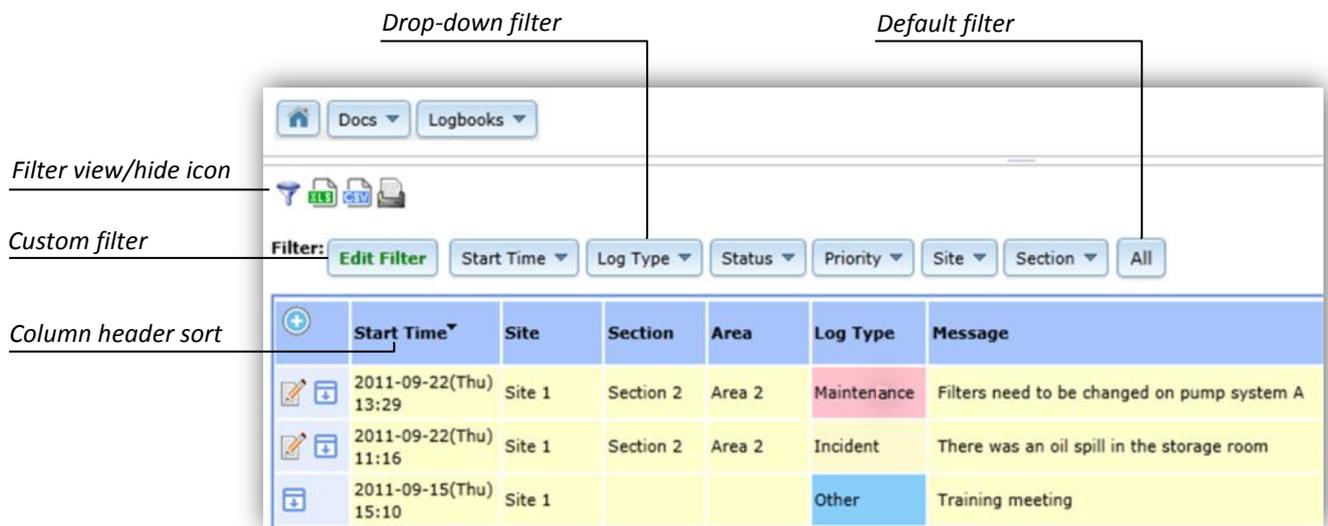
As the j5 site continues to be used and more and more logs are added to the system, there may be more than one page of information for you to look at. If this is the case, you will see page numbers at the top of the grid. You can navigate to these pages by clicking on the numbers. To get to the next page or the previous page quickly you can click on the 'next' and 'previous' links. If you have a large number of pages, then only the first 10 pages, and the last page numbers will be shown (as can be seen in the figure below). In this case, there are 32 pages. If you want to see past the 11th page, click on the number 11. This will expand the numbers to show the next 10 pages as shown in the diagrams below.

Page navigation: [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [11](#) [32 \(last\)](#)

Page navigation: [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [11](#) [12](#) [13](#) [14](#) [15](#) [16](#) [17](#) [18](#) [19](#) [20](#) [21](#) [32 \(last\)](#)

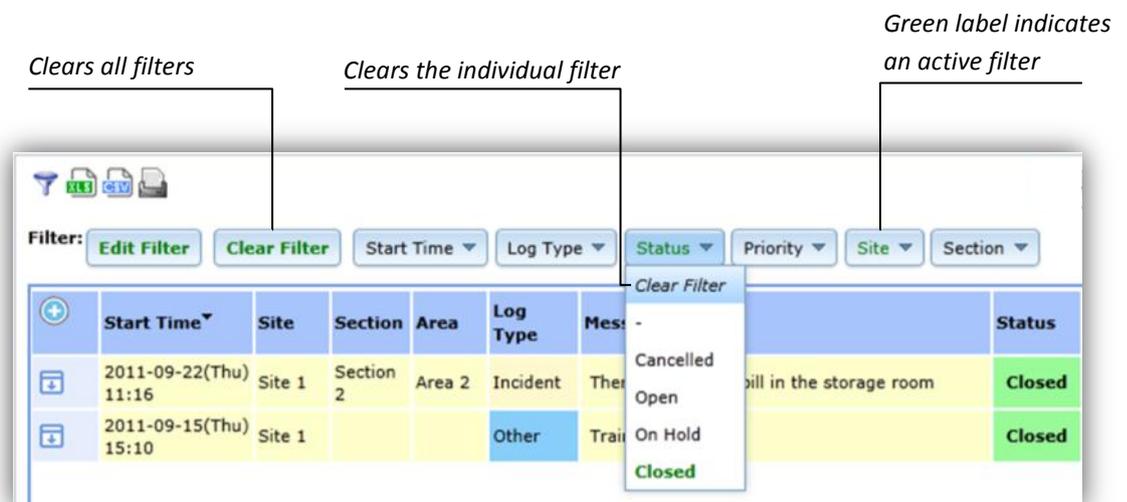
j5 comes with different filters allowing you to locate the exact log that you are interested in. Filters are a powerful tool for eliminating unnecessary information in order to view only relevant logs. Nonvisible (filtered) logs are still available, and will become visible again when you clear the current filter. There are several filters available in the form of predefined filters and drop-down filters. In addition you can create your own custom filters.

To show or hide the different filter options, click on the Filter View button. At any time you can also sort logs in ascending or descending order by clicking on the column header, as indicated by the arrow on the right hand side of the column header.



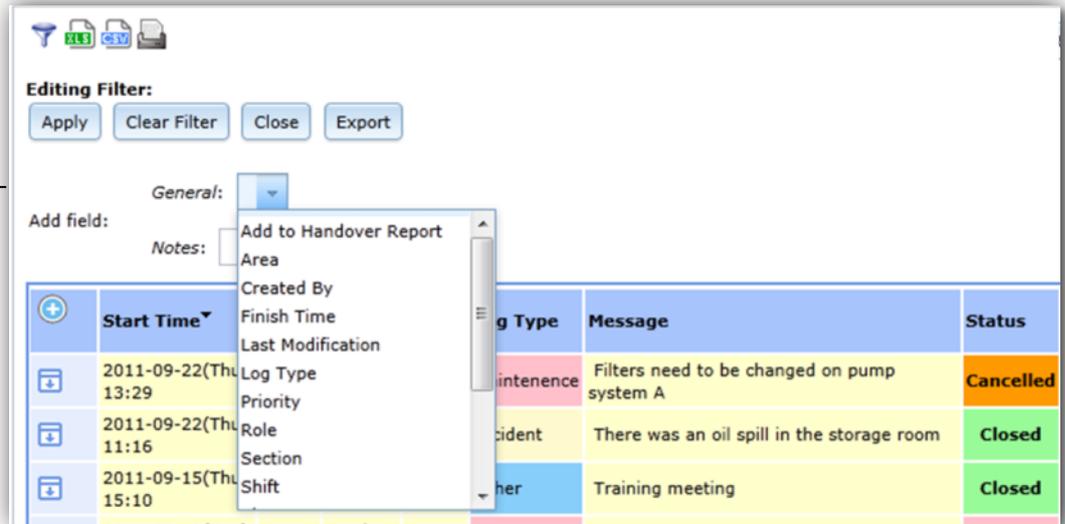
Predefined filters are buttons which when clicked show all logs that meet the criteria of that filter. For example: a predefined filter which says 'Current shift' will show all the logs in the current shift.

Drop-down filters are identified by the down arrow on the button. To use them, click on the appropriate drop-down filter button, select one of the options in the filter list and the drop-down filter will be applied to the logbook. Only logs matching the selected value will be displayed. You can apply multiple drop-down filters at once, for example, selecting 'Closed' from the Status drop-down filter and 'Site 1' from the Site drop-down filter will only show you closed logs from site 1. The text of the filter will appear green if it is a filter that is currently active. You can clear individual filters by selecting the 'Clear filter' option in the filter's drop down list. To clear all the filters, click the 'Clear filter' button.



You may require a filter option that is neither a predefined nor drop-down filter. If this is the case, you can create your own **custom filter**. To do this, click on the Edit filter button. A field drop-down will appear for the logbook and any sub-logbooks. When you click on the appropriate drop-down menus, filterable fields will appear as drop-down options.

Custom filter view



To filter by a specific field, select it from the drop-down list, enter any appropriate information and click 'Apply'. The custom filter will be applied to the logbook. Only logs matching the custom filter will be displayed. To remove a specific field from your custom made filter, click on the remove button ('-') next to the field which you wish to remove and then click apply. The custom filter will no longer filter by that field. Click 'Close' to close the Edit Filter view and retain your custom filter.

A custom filter searching by User Name and Log Type

Add other criteria to your search

Click to remove from search

Search fields found in main

Search fields found in sub logbooks (may be multiple)

	Start Time	Site	Section	Area	Log Type
	2011-09-22(Thu) 13:29	Site 1	Section 2	Area 2	Maintenance
	2011-09-22(Thu) 11:16	Site 1	Section 2	Area 2	Incident
	2011-09-15(Thu) 15:10	Site 1			Other

Note: Custom filters are not permanent filters and are re-set when you log out and log in again.

Exporting logs

In this section you will learn how to export the logs you have filtered to a file for a presentation, to print them out, or to e-mail to someone who does not have access to the j5 system. j5 can export into the following formats:

- **CSV** or comma-separated values, a popular spread sheet format without text formatting.
- **PDF** or Portable Document Format, a popular document format for sharing and printing (only available if the appropriate software has been installed by the system administrator).
- **XLS** or Microsoft Excel format, a popular spread sheet format with formatting.

To export or print logs, select one of the icons from the top of the page. Select the desired format (or combination of formats) and apply the filter to export/print the logs.

Export buttons

Export filter options

- **Export/print all rows on the page** exports all logs currently on the page
- **Export/print all rows in filter** exports all logs matching the current filter (including those not currently on the page).
- **Export/print X rows** exports a fixed number of rows matching the current filter.
- **In grid view** allows you export logs only in the summary view. If this box is unticked, then the logs will be exported in expanded view (where applicable)

Chapter 3

j5 Applications

Overview

This chapter covers the following:

- Applications: Overview
- Operator Logbook
- Planning Applications
- Handover logbook

j5 comes with a suite of different applications, the following of which are applicable to the general user:

- Simple, day-to-day logging of events in the **Operator Logbook**.
- Detailed tasks precisely defined and recorded in the **Work Overview Application** and **Ad Hoc Work Application**.
- Clear handover of responsibility between shifts in the **Handover logbook**.

Note: Many different applications are available for j5. The ones visible to you will depend on which applications you have purchased or configured

Operator Logbook

Introduction

Whenever an event occurs during the shift, it must be recorded quickly and accurately. Typically every event has an associated log time, location (where on site it occurred) and status. These records of events are known as general logs, and they are all stored in Operator Logbook. The Operator Logbook allows users to view general logs captured on the system. Depending on your role, you can read, modify and close some of these logs. Every general log is owned by the user who created it and remains active until closed by the owner.

In some cases, other users may need to add follow-up comments to an on-going event (for example, a manager may need to comment on a record that was logged by an operator). They can do this by adding a quick note to the general log. Notes take the form of a sub-log (visible as a notes log which sits underneath an expanded general log). By filtering which logs are visible, users can get a live summary of the state of a particular area of the site. Closed logs are permanently archived in the Operator Logbook for future access.

The screenshot shows the Operator Logbook interface. At the top, there is a navigation bar with a home icon, a dropdown menu for 'Logbooks', and a user profile 'test_op@j5Site'. Below this is a toolbar with icons for search, refresh, and page navigation. The main content area is a table of logs. One log is expanded to show its details and associated notes.

Expanded general log (indicated by a bracket on the left):

Start Time	2011-09-22(Thu) 13:29	Site	Site 1	Section	Section 2	Area	Area 2	Log Type	Maintenance	Message	Filters need to be changed on pump system A	Status	Cancelled	Attachment	None
Finish Time	2011-09-23(Fri) 11:16	Shift		Role	Operator	Add to Handover Report	Yes	Created By	MR. OPERATOR	Last Modification	2011-09-23(Fri) 11:16	Time Created	2011-09-22(Thu) 13:30		

General notes (indicated by a bracket on the left):

Log time	Created By	Message	Priority	Attachment
2011-09-23 18:11	MR. OPERATOR	Remember to buy new filters to replace the ones you will use	Medium	

Single general log (indicated by a bracket on the left):

Start Time	Site	Section	Area	Log Type	Message	Status	Attachment
2011-09-22(Thu) 11:16	Site 1	Section 2	Area 2	Incident	There was an oil spill in the storage room	Closed	
2011-09-15(Thu) 15:10	Site 1			Other	Training meeting	Closed	

Operator (indicated by a vertical label on the right side of the screenshot).

Operator Logbook fields

The screenshot shows a form for recording an operator log entry. The form is divided into several sections: a header with a plus icon and a title bar, a main data entry area with dropdown menus, a message text area with a rich text editor, and a footer with metadata fields. Callouts provide detailed explanations for various fields and their options.

Callouts and their corresponding fields:

- Time that event occurred:** Points to the **Start Time** field.
- Time that the log is closed (automatic):** Points to the **Finish Time** field.
- Your authorised areas:** Points to the **Site** field.
- Details about the event:** Points to the **Message** text area.
- The current shift:** Points to the **Shift** dropdown menu.
- The type of log you are recording (required field):** Points to the **Log Type** dropdown menu.
- Log status: 'Open', 'Closed', 'Cancelled' or 'On Hold':** Points to the **Status** dropdown menu.
- The role of the user who created the log:** Points to the **Role** dropdown menu.
- Log priority: 'Emergency', 'High', 'Medium' or 'Low':** Points to the **Priority** dropdown menu.
- Tick if log should be added to handover report:** Points to the **Add to Handover Report** checkbox.
- The user name of the person creating the log:** Points to the **Created By** field.
- Attach files containing additional information about the log:** Points to the **Attachment** field.
- A record of when the log was last modified:** Points to the **Last Modification** field.
- A record of when the log was created:** Points to the **Time Created** field.

Form Fields and Values:

Field	Value
Start Time	2011-09-26(Mon)
Finish Time	
Site	Site 1
Section	Section 2
Area	Area 1
Log Type	Operations
Status	Open
Priority	Low
Add to Handover Report	<input checked="" type="checkbox"/> Yes
Unit	Unit 1
Created By	MR. OPERATOR
Last Modification	2011-09-26(Mon) 10:29
Time Created	2011-09-26(Mon) 10:29

Message Content:

Please note that the following items need to be replaced at some stage:

- Pump head
- Filters
- Hosepipe

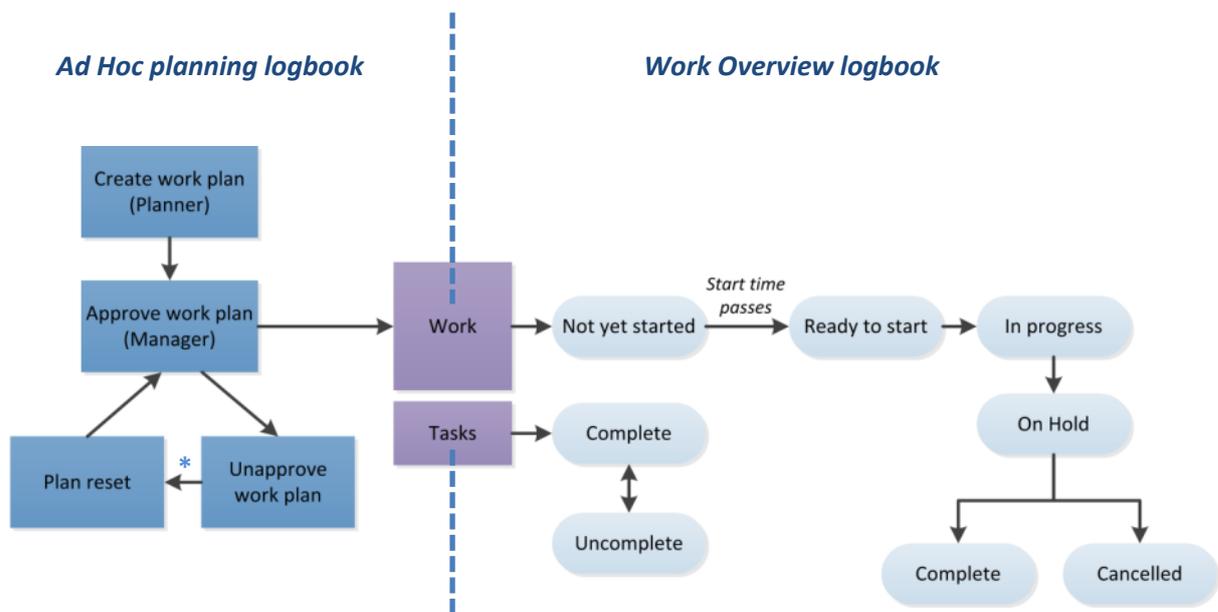
Advantages

- **Validated:** The j5 system **validates logs on entry** to ensure data capture is as accurate as possible.
- **Traceable:** The **ownership** of logs is clearly defined.
- **Central:** All **general logs are stored in one place**, accessible to all users who have permission to view them.
- **Accessible:** General log archives are easily accessible.

Planning

Introduction

Work needs to be planned on an impromptu (ad-hoc) basis, and at the same time have a well-defined procedure for approval and completion. The Planning application provides the mechanism to do this. Work plans are drawn up using the Ad Hoc Work Application and the various tasks contained within this plan are viewed by operators using the Work Overview Application. The typical work flow for work plans is shown in the diagram below.

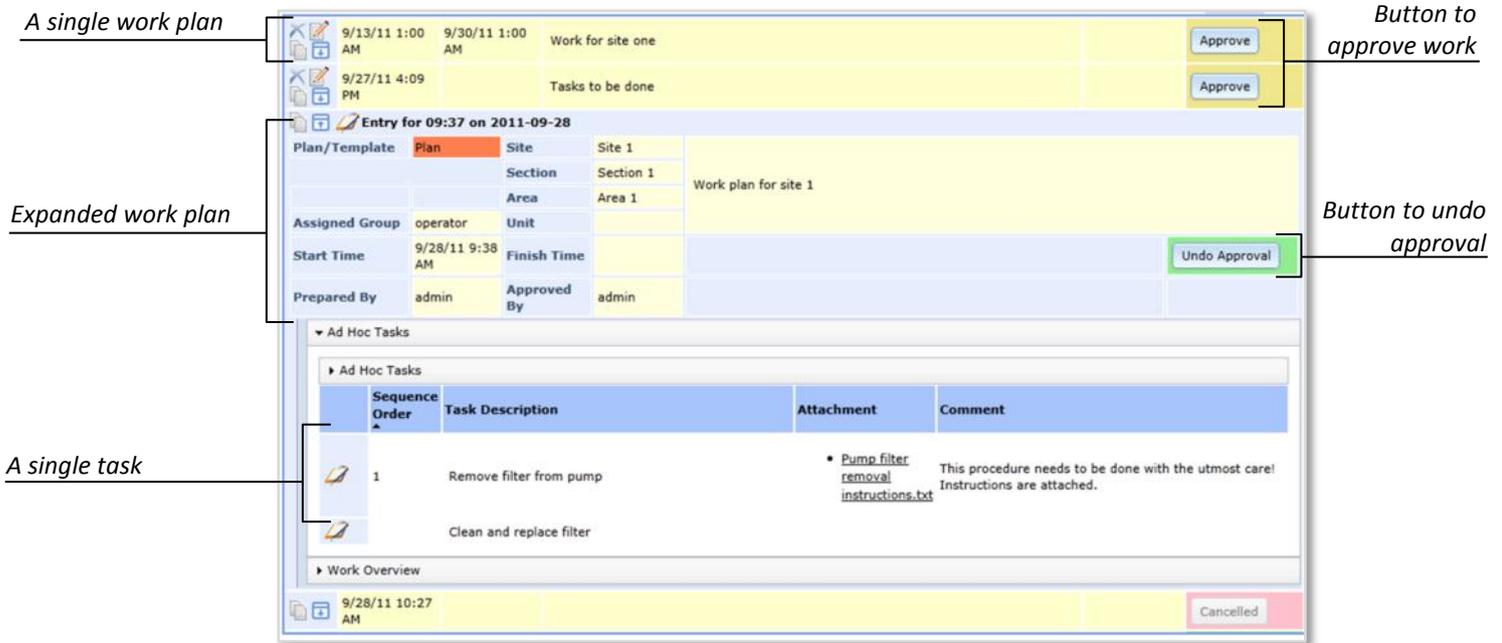
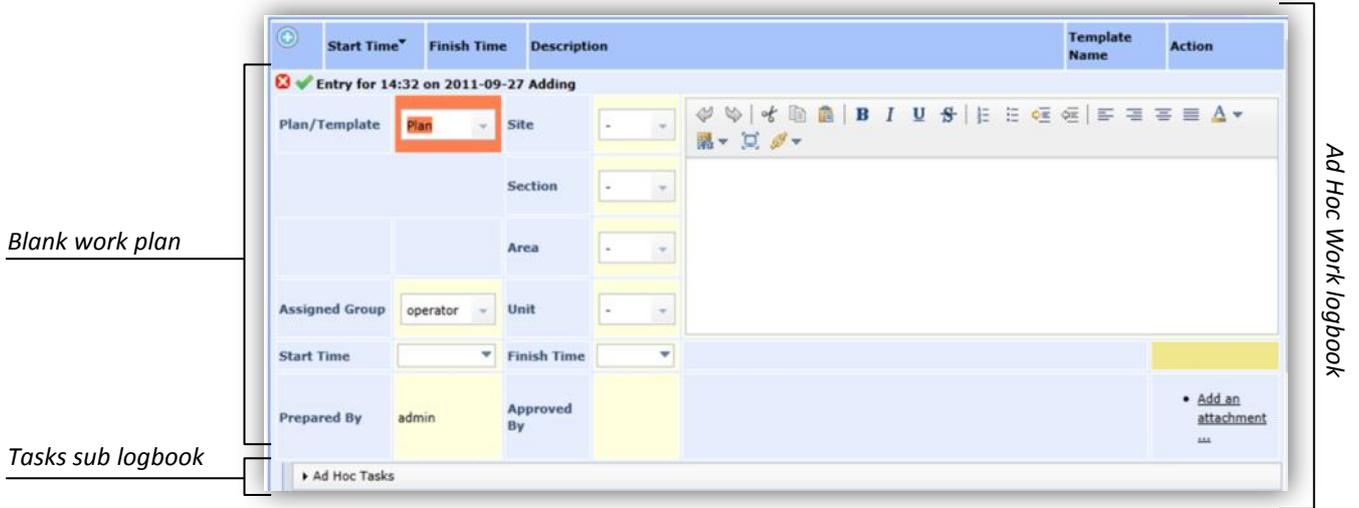


***Note:** If a plan is reapproved, all old existing data in the work overview (i.e. comments, work flows from operators) will be deleted and the work will be reset. Unapproved work plans may be deleted

How to create a work plan

To create a new plan, add a new log in the Ad Hoc Work Application and fill in all the necessary fields. These include the site (section/area and/or unit) to which you wish to assign the work. You will need to fill in a start and finish time as well as a brief description of the work to be done. You may then add more detailed tasks to the work plan by clicking on the 'Add' button in the Ad Hoc Tasks sub-log.

Once the plan has been saved, it needs to be approved by a manager before the tasks become visible to operators in the Work Overview Application. Once the plan has been approved, it is no longer editable. The manager (or other authorised users) may undo the approval of the work plan at any time (unless the work has been completed). If a plan is unapproved all tasks relating to that plan will be retracted until the plan is reapproved.



Ad Hoc Work logbook fields

The screenshot shows the 'Ad Hoc Work logbook' interface. The main form is titled 'Entry for 09:08 on 2011-09-28 Adding'. It contains several fields and sections:

- Plan/Template:** A dropdown menu with 'Plan' selected. An annotation points to it: 'Select plan or template from the drop down'.
- Site, Section, Area, Unit:** Four dropdown menus for hierarchical location selection. An annotation points to the Site field: 'Site/Section/Area/Unit to which the work is assigned'.
- Assigned Group:** A dropdown menu with 'operator' selected. An annotation points to it: 'Assign the work to specific user group'.
- Start Time, Finish Time:** Two date/time pickers. An annotation points to them: 'Start and Finish Time of the work'.
- Prepared By:** A text field with 'admin' entered. An annotation points to it: 'Name of the user who created the plan'.
- Approved By:** A text field. An annotation points to it: 'Name of the user who approved the plan'.
- Attachment:** A button labeled 'Add an attachment ...'. An annotation points to it: 'Add attachments'.
- Tasks sub logbook:** A table below the main form with columns: 'Sequence Order', 'Task Description', 'Attachment', and 'Comment'.
 - An annotation points to the 'Sequence Order' column: 'The order in which the tasks appear in the list'.
 - An annotation points to the 'Task Description' column: 'Description of the task'.
 - An annotation points to the 'Attachment' column: 'Add attachments'.
 - An annotation points to the 'Comment' column: 'Add comments here'.

Work Overview Application

Once a planner has created and saved a work plan and it has been successfully approved by a manager, the plan will be visible in the Work Overview Application, ready for the operators to begin work. If the start time of the work plan is in the future, the status of the work will be 'Not Yet Started'. This status will tick over to 'Ready to Start' as soon as the start time is reached. Note that users may begin work on tasks even if the start time has not yet passed. The operator may complete each task by clicking on the 'Set as Complete' button. The operator can undo this action by clicking on the 'Completed' button. Operators may also add comments or attachments to the tasks where necessary. The status of the overall work plan must also be changed to reflect the progress of the underlying tasks.

The screenshot displays the 'Work Overview Application' interface. At the top, a table lists work plan entries with columns for Start Time, Finish Time, Site, Area, Description, Status, Type, and Sub Tasks. Below this, a detailed view of a work plan is shown for 'Entry for 12:44 on 2011-09-28'. This view includes fields for Status (In Progress), Log Type (Maintenance), Site (Site 2), Section (Section 2), Area (Area 2), Assigned Group (operator), Unit (Unit 1), Start Time (9/28/11 12:42 PM), Finish Time (9/29/11 12:42 PM), Prepared By (admin), and Approved By (admin). Below the work plan details is a 'Tasks' section with a table listing individual tasks. The first task, 'Remove filter from pump A', is marked as 'Completed' and has an attachment 'Pump filter removal instructions.txt'. The second task, 'Clean the filter and replace', has a 'Set to Complete' button. A callout box points to this button with the text: 'Complete a task by clicking the 'Set to Complete' button'. Labels 'Details of the work plan' and 'Individual tasks' point to their respective sections. A vertical label 'Work Overview logbook' is on the right side.

The work plan status can be changed from 'Ready to Start' to 'In Progress', 'On Hold', 'Complete' or 'Cancelled'. If the status is changed to 'Complete' or 'Cancelled' the status may not be changed again. Once a work plan is marked as 'Complete' or 'Cancelled' in the Work Overview Application, the actual plan in 'Ad Hoc Work' will now be marked as 'Finished' and will no longer be editable. If a work plan is still in progress and passes the designated finish time, the finish time will be flagged in red to notify the users that the work is overdue.

Work Overview Application fields

The location to which the work is applicable

Status of the work

Select the log type

The group to which the work is assigned

The Start and Finish Time of the work plan

Name of user who created the plan

Name of user who approved the plan

Attachments from original work plan

Attachments for Work Overview

The order in which the tasks appear in the list

Description of the task

Status of the task

Attachments applicable to individual tasks

Comments applicable to individual tasks

Start Time	Finish Time	Site	Area	Description	Status	Type	Sub Tasks	
Entry for 12:44 on 2011-09-28								
Status	In Progress	Site	Site 2	Work plan for site 2				
Log Type	Maintenance	Section	Section 2					
Assigned Group	operator	Unit	Unit 1					
Start Time	9/28/11 12:42 PM	Finish Time	9/29/11 12:42 PM					Plan Attachment
Prepared By	admin	Approved By	admin					Attachment
Sequence Order	Task Description	Change Status	Attachment	Comment				
1	Remove filter from pump A	Completed	<ul style="list-style-type: none"> Pump filter removal instructions.txt 	This task needs to be done with the utmost care! Follow instructions attached.				
2	Clean the filter and replace	Set to Complete						

How to create and use a template

In many cases, the same work plan needs to be repeated on a regular basis. Instead of creating a new work plan from scratch each time, the planner may decide to make a once off copy of a work plan by clicking on the copy button. This will open up a work plan (in edit mode) which will be automatically populated with all the information from the original plan. The planner may edit this information where necessary, save it and proceed with the work plan as per usual. An even more efficient way to make copies of different plans is to use a predefined template.

Select 'Template' from the drop down & give template a name

Expanded template

Contracted template

Click to create a new plan from an existing template

A blank template is created in exactly the same way as a work plan. However, the planner must ensure that 'Template' is selected from the drop down menu as per the above illustration. Once the work plan and associated tasks are saved, the template will be stored permanently in the Ad Hoc Work Application. Once the template has been created, you will notice that the 'Approve' button has been replaced by a 'Use Template' button in the Action column. When the 'Use Template' button is clicked, a new work plan, with the predefined information will be opened. The benefit of using templates is that a range of templates are readily available in your own manageable template library.

Handover logbook

Introduction

At the end of the shift, the outgoing operator may be required to hand responsibility over to the incoming operator. This action is called the handover and a well-defined handover procedure is a hallmark of good governance. The handover log is an automatically generated summary of the shift for a specific location (site/section/area/unit) and can be found in the Handover logbook. The handover log contains all relevant information for the current shift including the handover status, a list of all general logs and works (as sub-logbooks) from the current shift as well as comments from operators, supervisors and/or managers.

Only current handover logs are visible

The screenshot shows a web application interface for a handover logbook. At the top, there is a navigation bar with a 'Logbooks' dropdown menu and a user profile 'test_op@j5Site'. Below this is a filter section with buttons for 'Edit Filter', 'Clear Filter', and several dropdown menus for 'Site', 'Section', 'Area', 'Unit', and 'Status'. A 'Refresh' button and 'Page: 1' indicator are also present. The main content is a table with columns for 'Site', 'Section', 'Area', 'Unit', 'Summary', 'Shift Report', and 'Status'. The first entry is expanded, showing details for a shift on 2011-09-26. This entry includes fields for Site (Site 1), Section (Section 2), Area (Area 1), and Unit (Unit 1). It also shows start and finish times, a shift report, and attachments. Below the main entry, there are sections for 'Operator Comment', 'Supervisor Comment', 'Manager Comment', 'Outgoing Approval', and 'Incoming Approval'. At the bottom, there is a 'Contracted handover log' entry for Site 1, started at 11:57 on 2011-09-15, with a status of 'Open for Approval'. Annotations with arrows point to various parts of the interface: 'Expanded handover log' points to the first entry, 'Sub-logbooks containing additional logs applicable to the current handover' points to the 'General' and 'Work Overview' sub-sections, 'Contracted handover log' points to the bottom entry, and 'Handover logbook' is written vertically on the right side.

Expanded handover log

Sub-logbooks containing additional logs applicable to the current handover

Contracted handover log

Handover logbook

Handover logs may also have a sub-log, called a handover form, which is a configurable template used to capture any additional shift information that is otherwise not automatically recorded in the handover log. For example, operators may need to complete a check list before handing over responsibility to their relief.

Logbooks test_op@j5lite Refresh Page: 1

Site	Section	Area	Unit	Summary	Shift Report	Status				
Entry for 14:58 on 2011-09-28										
Site	Site 1	Started at 14:58 (2011-09-28) for Site 1-> Section 1								
Section	Section 1									
Area		Start Time	9/28/11 2:58 PM	Shift Report						
Unit		Finish Time		Attachments						
Operator Comment										
Supervisor Comment										
Manager Comment										
Outgoing Approval	Not Approved									
Incoming Approval	Not Approved					Open for Approval				
<ul style="list-style-type: none"> Handover Form Work Overview General 										
Site	Site 1	Section	Section 2	Area	Area 1	Unit	Unit 1	Shift (Shift 5) Started at 10:30 (2011-09-28) for Site 1-> Section 2-> Area 1-> Unit 1	Status	Open for Approval

Handover Form sub-logbook

Select an appropriate status for the form entry log

User name and date are automatically saved on the log

Form label (in blue)

Form entry log

Handover Form

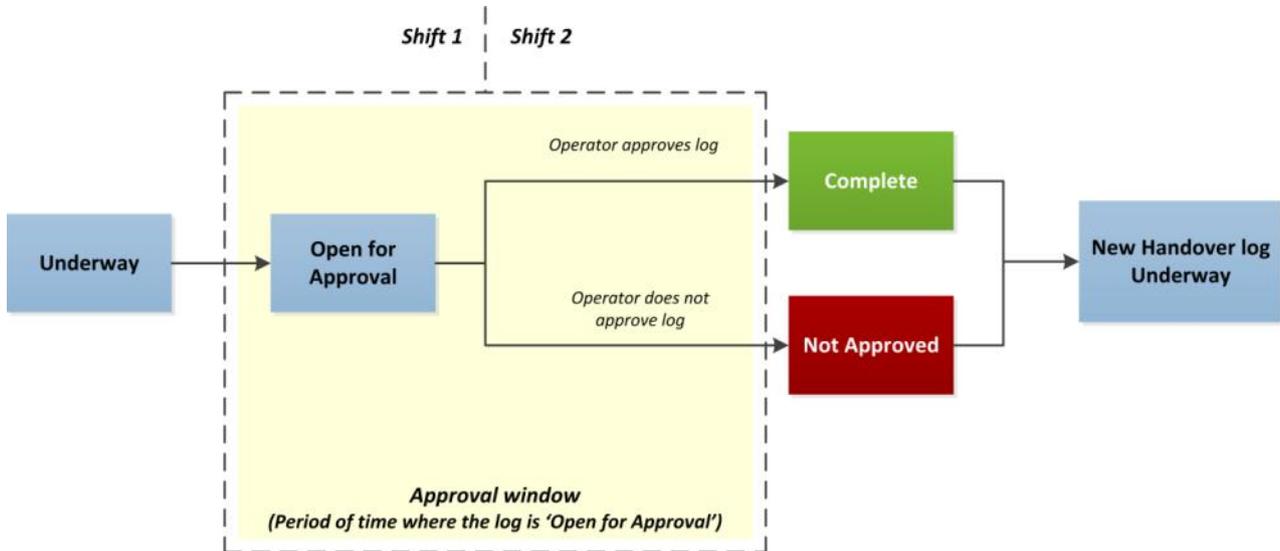
Description	Comment or Value	Status	User	Date	Attachment
Equipment					
Tank levels need to be at 70%	The tank levels were normal	Complete	MR. OPERATOR	9/28/11 3:03 PM	
Check vibration of turbine 3	There are still vibrations coming from turbine 3	Unacceptable	MR. OPERATOR	9/28/11 3:03 PM	
Ensure steady flow into reservoir 5	OK	OK	MR. OPERATOR	9/28/11 3:11 PM	
To complete at handover					
Hand in mobile data device		Open			
Ensure all logs are up to date		On Hold			
Send report to console 5		Cancelled			

Handover form

Note: You may or may not have a handover form as it depends on the configuration of your handover logbook

Handover Workflow (Basic model)

A typical handover between two shifts adheres to the following workflow (see diagram below):



- During the shift, the handover log is marked as **'Underway'**. Throughout this period, authorised users can add comments to the handover log if necessary.
- As the end of the shift approaches, the handover log becomes **'Open for Approval'**. At this point, operators can approve a log (by clicking on **'Approve'**) which indicates that they have reviewed the handover log and are satisfied with the records and events from the previous shift.
- They are now ready to hand over responsibility to the next operator. The incoming operator then reviews the handover log to ensure that he is happy with the handover log and to take note of any events that may be carried over from the previous shift. To complete the final stage of approval, the incoming operator clicks **'Approve'** and saves the handover log.
- The names of the individuals involved in approving the handover will be automatically recorded with the log and the status of the handover log will now be marked as **'Complete'**. This log will no longer be editable and a new, underway handover log is created.
- At this point, a shift report may be generated and attached to the outgoing handover log. If the operators fail to approve the handover log in the allotted time, the system will automatically close the handover log and mark it as **'Not Approved'**. All completed or not approved handover logs can be found in the Handover logbook.

Status of the handover

	Site	Section	Area	Unit	Summary	Shift Report	Status
 	Site 1	Section 2	Area 1	Unit 1	Shift (Shift 6) Started at 14:37 (2011-09-29) for Site 1-> Section 2-> Area 1-> Unit 1		Underway
   Entry for 14:58 on 2011-09-28							
Site	Site 1		Started at 14:58 (2011-09-28) for Site 1-> Section 1				
Section	Section 1						
Area			Start Time	9/28/11 2:58 PM	Shift Report		
Unit			Finish Time		Attachments		
Operator Comment	There is nothing unusual to report for this handover						
Supervisor Comment	There is nothing unusual to report for this handover						
Manager Comment							
Outgoing Approval	Approved		admin	9/29/11 2:40 PM			
Incoming Approval	Not Approved				Open for Approval		
<div style="border: 1px solid gray; padding: 2px;"> <p>▶ Handover Form</p> <p>▶ Work Overview</p> <p>▶ General</p> </div>							
 	Site 1				Started at 11:57 (2011-09-15) for Site 1		Open for Approval

*Approval fields:
Date & name of
approver recorded
Summary view*

Outgoing Approval Approved Not Approved

Approve a handover log by selecting the 'Approved' button (once in edit mode)

Every organisation has their own way in which they perform handovers. Some use shift based systems when handover occurs at the end of a shift. Other companies are not restricted by shifts and can hand over at any time. Some may require several people to approve a handover while others simply require a new handover to be created automatically after a certain period of time. j5 is easily configured to suite any handover requirements and will be set up for you by your system administrator. There are several types of handovers which you, as a user, may encounter; the most common of which are shown in diagrams on the next few pages.

Handover logbook: Scenario 1

Handover Report (also known as a handover log)

The screenshot displays a handover logbook interface. At the top, a summary table lists the shift details. Below this, a detailed entry for 14:52 on 2011-09-29 provides specific location and time information. The bottom section, titled 'General', contains a table of log entries, including a maintenance log entry for oiling pump heads.

Site	Section	Area	Unit	Summary	Shift Report	Status
Site 1	Section 2	Area 1	Unit 2	Shift (Shift 3) Started at 14:58 (2011-09-29) for Site 1-> Section 2-> Area 1-> Unit 2		Underway

Site	Section	Area	Unit	Start Time	Finish Time	Shift Report	Attachments	Status
Site 1	Section 2	Area 1	Unit 2	9/29/11 2:52 PM				Underway

Start Time	Site	Section	Area	Log Type	Message	Status	Attachment
2011-09-29(Thu) 15:01	Site 1	Section 2	Area 1	Maintenance	Oil the pump heads	Open	

Annotations:

- On-site location of handover*: Points to the Site, Section, and Area fields in the detailed entry.
- Start & Finish time of the handover*: Points to the Start Time and Finish Time fields in the detailed entry.
- Work & General sub-logbooks*: Points to the 'General' sub-logbook section.
- Shift summary*: Points to the top summary table.
- Shift report & other attachments located here*: Points to the Shift Report and Attachments fields in the detailed entry.
- Status of handover*: Points to the Status field in the detailed entry.
- General logs will only appear in the General sub-logbook if the 'Add to Handover' box has been ticked in Operator Logbook*: Points to the log entry in the 'General' sub-logbook.

Note: This handover log does not have any comment fields and does not require operator approval

Handover logbook: Scenario 2

Handover Report (also known as a handover log)

Site	Section	Area	Unit	Summary	Shift Report	Status	
✖ ✔ Entry for 19:58 on 2011-09-29 Editing							
Site	Site 3		Shift (Shift 3)				Shift summary
Section	Section 1		Started at 17:58 (2011-09-29) for Site 3-> Section 1				
Area			Start Time	9/29/11 7:58 PM	Shift Report	Shift report & other attachments located here	
Unit			Finish Time		Attachments		
• Add an attachment ...							
Operator Comment							
There is nothing out of the ordinary to report for this shift Relief arrived on time							
Supervisor Comment							
Outgoing Approval <input type="radio"/> Approved <input checked="" type="radio"/> Not Approved							
						Open for Approval	Handover status
▶ Work Overview ▶ General							

On-site location of handover

Start & Finish time of the handover

Comment fields

Single approval

Work & General sub-logbooks

Note: This handover log requires only one user to approve the handover. There are two comment fields, which are editable depending on your user

Handover logbook: Scenario 3

Handover Report (also known as a handover log)

Site	Section	Area	Unit	Summary	Shift Report	Status
Entry for 20:10 on 2011-09-29						
Site	Site 3	Shift (Shift 2)		Shift report & other attachments located here		
Section	Section 1	Started at 20:10 (2011-09-29) for Site 3-> Section 1				
Area		Start Time	9/29/11 8:10 PM	Shift Report		
Unit		Finish Time		Attachments		
Operator Comment						
Supervisor Comment						
Manager Comment						
Outgoing Approval	Not Approved					
Incoming Approval	Not Approved				Underway	Handover status
<ul style="list-style-type: none"> ▶ Work Overview ▶ General 						
Entry for 17:58 on 2011-09-29						
Site	Site 3	Section	Section 1	Shift (Shift 3)		Open for Approval
Started at 17:58 (2011-09-29) for Site 3-> Section 1						

On-site location of handover

Comment fields

Two approvals required

Work & General sub-logbooks

Shift report & other attachments located here

Handover status

Note: This handover log requires two users to approve the handover. There are three comment fields, which are editable depending on your user rights.

Advantages

- **Accountability:** Handover responsibility is **recorded**
- **Uniformity:** Handover procedure is **well-defined**
- **Central:** All **handover logs are stored in one place**, accessible to all users who have permission to view the relevant area
- **Accessible:** Handover **archives are easily accessible**

Chapter 4

Additional Features

Overview

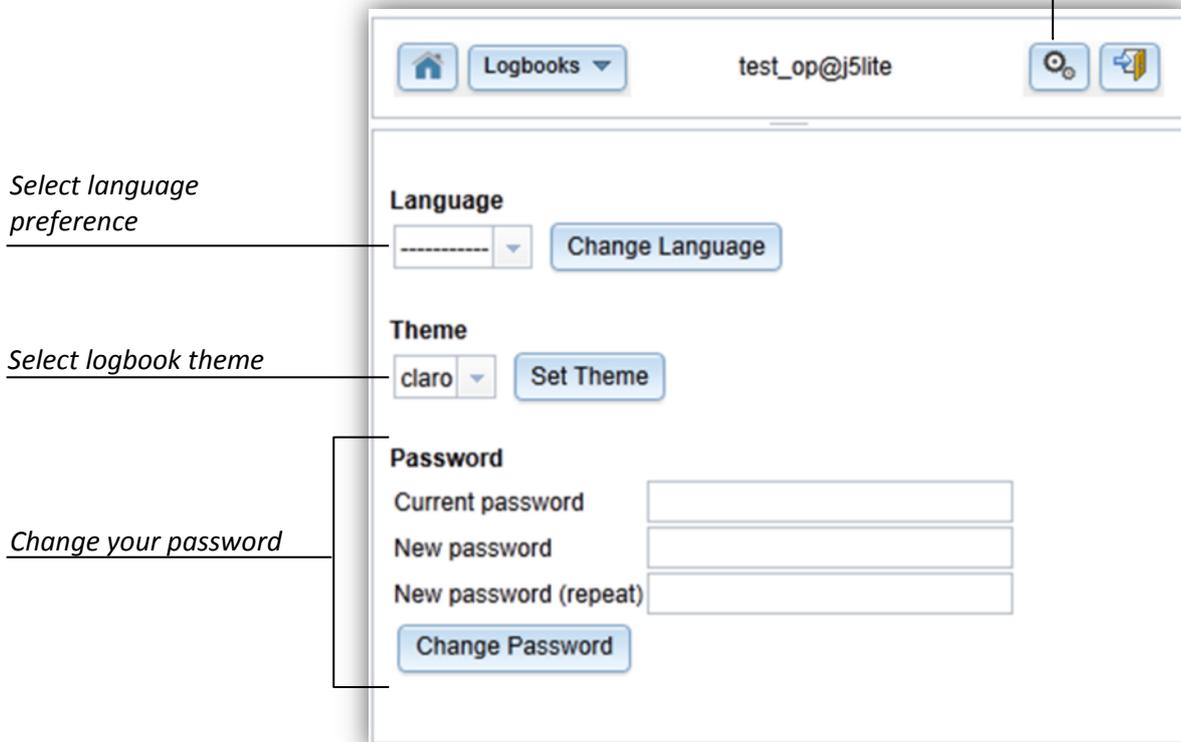
This section covers the following:

- Preferences
- Rich text fields
- Attachments
- User Roles

Preferences

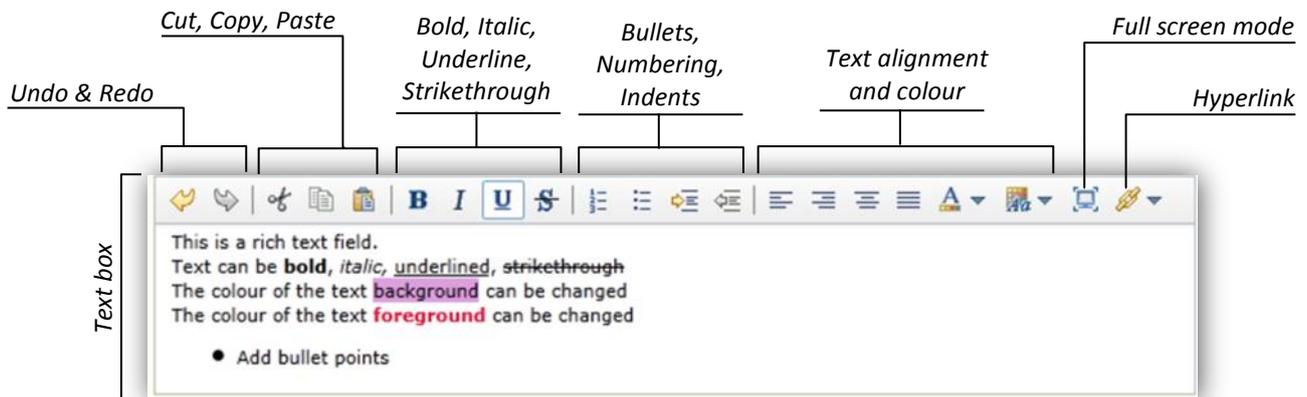
You can change the language, theme (colour) and your password on the preferences screen at any time. To do this, click on the Preferences button at the top right-hand corner of the screen as shown below.

Click this icon to go to the preferences screen



Rich text fields

Many of the j5 comment or description fields are rich text fields. This means that you can change the style and colour of the text by using the rich text editor. If a field is a rich text field, the editor will automatically appear above the field in question while in edit mode. To view which functions are available, see figure below. Functionality will vary across browsers.



Attachments

Many of the j5 logs allow you to add attachments. To do this, simply click on 'Add an attachment', browse to the location of the file you wish to attach, and add the attachment. Attachments may be deleted if necessary by clicking 'delete'. There may be file size/type restrictions depending on the set-up of your j5 server.

User roles

Every j5 user is assigned a **user role**, which reflects their work function and how they can use j5. Your user role defines which j5 applications you are permitted to access, and which actions you are permitted to perform in those applications. For example, all users can access the Operator Logbook, but only technical users and managers can plan work in the Ad Hoc Work planning Application.

Additional permissions may be defined within each application. For example, an operator can edit a general log that they have added, but not a log that another operator has added.

Your username will also determine what kind of rights you have on the applications. For example, you may be able to see an application but not edit it. Likewise, you may be able to edit an application's logs but only if you yourself entered that particular log.

The following user roles are defined in the basic configuration:

- **Read-only:** A user who only needs to read logs, and does not add or modify them.
- **Operator:** A user who needs to record logs, perform planned work and hand over responsibility at the end of the shift.
- **Supervisor:** A user who supervises a shift and may need to record comments at the end of the shift.
- **Technical:** A user who plans work for operators to perform during the shift.
- **Manager:** A user who comments on handovers and approves planned work and handovers.
- **System administrator:** An administrator who maintains and configures the system.

To find out what authorities you have, you can simply try out the functions or contact your system administrator who will be able to inform you directly.

Note: Whenever you add a log, the system will automatically record your username and associate it with the log. Similarly, whenever you modify a log, the system will record your user name and will also make a note in the audit log of any changes you have made to the system.

Glossary

Glossary

Ad Hoc Work Application: The j5 Application used to create new work plans

Browser: A program that accesses and displays files and other data available on the Internet and other networks.

Button: A widget that is clicked to perform an action.

Connectors: The ability of j5 to connect and retrieve information from various third party industrial applications

CSV: Comma-separated values, a popular spread sheet format without text formatting.

Drop-down: A widget that is clicked to reveal a number of options.

Expanded view: A view on a log that shows many fields in a grid layout.

Field: A storage location for a single value in a log.

Filter: A rule that determines which logs are visible.

Operator Logbook: A j5 application used to record information about the day-to-day events in an industrial plant.

Handover: The procedure that governs process of handing responsibility on to another user.

Handover logbook: The j5 application used to facilitate the handover of responsibility between shifts.

Intranet: a private network that is contained within an organisation.

LDAP: A method of authentication that allows you to enter the same username and password that you enter elsewhere on the network.

Log: A single record in a given logbook.

Logbook: An application that manages viewing, adding and editing logs or other information.

Menu: A navigation tool for choosing which application to view.

PDF: Portable Document Format, a popular document format for sharing and printing

Permission: Whether or not you are allowed to perform an action. See also *user role*.

Rich text field: Fields where text can be entered and formatted in various ways including '**bold**', '*italics*', 'underline' etc.

Role: See *user role*.

Single sign-on: A method of authentication that automatically logs you in to j5 without prompting for a username and password.

SSO: See *single sign-on*.

Sub-logbook: A miniature logbook that appears within a log.

Sub-log: A log in a sub logbook.

Summary view: A view on a log that shows fewer fields in a single line.

Template: A preformatted version of a log or a work plan to help the user create new plans/logs quickly

User role: Your work role as defined in j5, which determines what permissions you have. See also *permission*.

Web browser: see *browser*

Widget: Any interactive element on the screen.

Work Overview Application: The j5 Application that allows users to see and manage tasks that have been assigned to them

XLS: Microsoft Excel format, a popular spread sheet format with formatting.

Appendix 1: User Rights Table

	General Logbook				General Notes				Handover Logbook				Handover Form*				Ad Hoc Work				Work Overview*			
	View	Add	Modify	Delete	View	Add	Modify	Delete	View	Add	Modify	Delete	View	Add	Modify	Delete	View	Add	Modify	Delete	View	Add	Modify	Delete
Read-Only	✓	x	x	x	✓	x	x	x	✓	x	x	x	✓	x	x	x	✓	x	x	x	✓	x	x	x
Operator	✓	✓	✓	x	✓	✓	✓	x	✓	x	✓	x	✓	x	✓	x	x	x	x	✓	x	✓	x	
Supervisor	✓	✓	✓	x	✓	✓	✓	x	✓	x	✓	x	✓	x	✓	x	x	x	x	✓	x	✓	x	
Manager	✓	x	x	x	✓	✓	✓	x	✓	x	✓	x	✓	x	x	x	✓	x	✓	x	✓	x	✓	x
Technical/planner	✓	x	x	x	✓	✓	✓	x	✓	x	x	x	✓	x	x	x	✓	✓	✓	✓	✓	x	x	x
System Administrator	✓	✓	✓	✓	✓	✓	✓	✓	✓	x	✓	x	✓	x	✓	x	✓	✓	✓	✓	✓	✓	✓	✓

Note: Table contents for applications marked with * may not be applicable as it depends on whether that particular feature has been configured for your

Legend

-  Yes
-  Yes – only if user owns the log or has rights to approve it
-  No