Purpose of this QRG

- To teach you how to configure a Shift Handover Report in the OLT

Intended Audience for this QRG

- Administrators in the OLT

Purpose of Configuring Shift Handover Reports in the OLT

- To ensure Shift Handover Reports can be customized to meet the unique needs of each business unit.
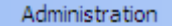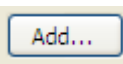
Prerequisites

- You must have access to the OLT software application
- You must have an Administrator role in the OLT to complete the procedure described below
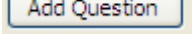
Helpful Hints

- Shift Handover Reports include answers to questions concerning events that occurred in a specific business unit, during a particular shift
- Shift Handover Reports can be customized to provide sufficient detail to meet the needs of people who have been away from work and to meet the maintenance activity in a plant

Procedure

1. Click Administration menu (located at the top of your screen) [Administration] to activate the Administration drop-down menu.
2. Click Administration > Shift Handover to select it.
3. Click Add… [Add...] to navigate to the Shift Handover Configuration screen.
4. As required, complete the following fields:

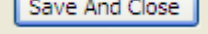| Field	Sub-steps/Description
Shift Handover Type:	Type a name for the Shift Handover in the Shift Handover. For example, type 'Six-day Shift Handover'
Roles:	Click the scroll-bar control (located next to the Roles: text box) to scroll through the Roles. Click desired check box ☐ to select a Role from the list. *Note:* Roles can be set to: *Administrator; Area Manager; Engineering Support; Engineering Support Plus; Non-Operations Permit Issuer; Operating Engineer; Operator; Permit Screener; Permit Screener Commentor; Read User; Restriction Reporting Admin; Supervisor; Supervisor Plus*

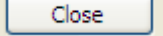| Functional Locations:	Click the desired check box(s) ☐ to select a Functional Location(s). *Note:* *If required, click additional check boxes to select additional Functional Locations*

5.   Click Add Question button (located on the bottom of your screen) **Add Question** to add a question to the Shift Handover Report

6.   As required, complete the following fields:

Field	Sub-steps/Description
Question:	Type a question for the Shift Handover Report. For example type 'Were there any accidents/incidents on your shift? If 'yes,' provide details.
Help Text:	Type some useful information to help users who may be unsure of how to answer the above question. For example type 'If you answered 'yes' to the above question, here is an example of what you might include in your detailed description: Location; Plant #; Shift; Contact Name; Circumstances; and more.'

7.   Repeat Steps 5 & 6 above to add additional questions/help text and customize the report to meet the unique needs of your business unit.

8.   Click Save and Close button **Save And Close** to save your work and close the Shift Handover Configuration screen.

9.   Click Close button **Close** to close the screen.