

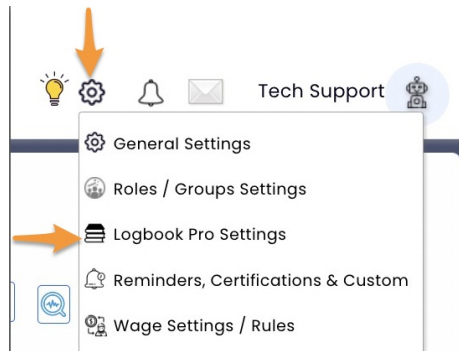
# Logbook Pro Setup and Use

Last Modified on 07/31/2023 5:14 pm MDT

## Logbook Setup

From the Gearwheel Menu > Logbook Pro Settings

(Requires permission levels: Admin, Location Admin, or Custom)



Setup Logbook Topics (Topics will appear as Form Headings when filling out Shift Reports)

**Logbook Pro Topics**

Collect information about the day

Active  Optional Entry  2 of 11 Schedules  Topic Name Employee Comments  1 of 3 Day Parts

Prepopulate the Topic notes with:  
enter prepopulate text here

Topic shows in: Restaurant FOH, Restaurant BOH

Select either optional or required entry.

Optional Entry

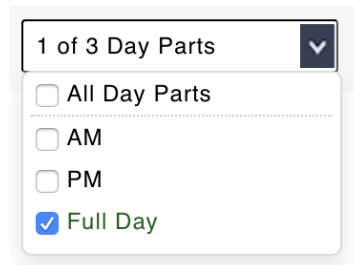
Select which schedules Topics apply to, i.e. FOH / BOH...

2 of 11 Schedules

**NOTE:** Multiple schedules can share the same Topic. Comments will be consolidated when Logbook Report is viewed / emailed. Or, a Topic can be applied to a single schedule, i.e. *Kitchen Notes* could be applied to **BOH**, and would then visible for entry when submitting Shift Notes to the **BOH**.

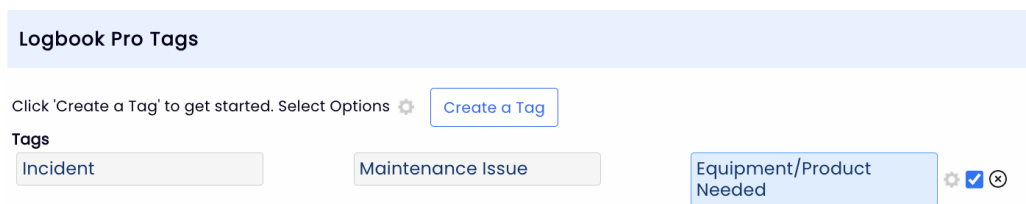
**NOTE:** All Topics will roll up into a single report, viewable to the degree viewing permissions allow.

Select which Day Parts Topics apply to. If only a single Shift Report per day is applicable, choose Full Day. If multiple shifts will report per day, choose AM and PM. Or blend all three.



## Setup Logbook Tags

**NOTE:** Tags can be applied to any Logbook Entry, and then used for filtered reporting.



## Permission Setup

### Permission to ENTER Shift Notes

- Automatically given to Admins, Managers L1 / L2 / L3, Shift Managers & MODs
- This Permission can be added to custom templates

#### Logbook

- View Logbook (Schedule Specific)**  
View Logbook topics
- Make Logbook Entries**  
Add entries to Logbook topics

### Permission to VIEW Logbook Reports

- Automatically given to Admins, Manager L3
- This Permission can be added to custom templates

#### Logbook

- View Logbook (Schedule Specific)**  
View Logbook topics

- **NOTE:** For a manager to view a complete Logbook Report from all Departments / Schedules, they must have the *View Logbook* Permission applied for all locations where they are not already a manager. The *View Logbook* permission can be applied to an individual from their *Permissions* tab in their Employee Profile, as shown below:



# Logbook Use

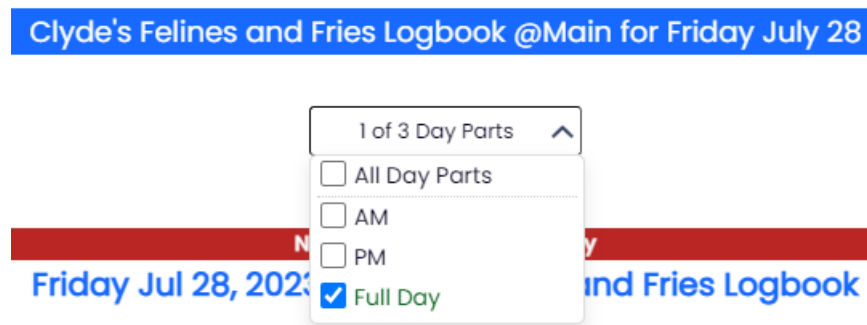
## Entering Shift Notes

### Desktop

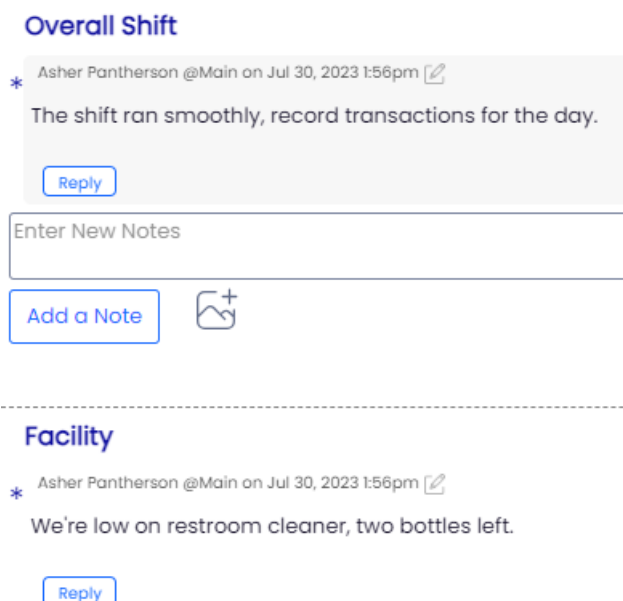
1. From the Schedule (where user's permission resides) click the Logbook icon that corresponds with the applicable date



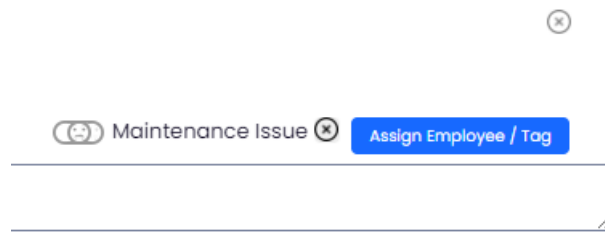
2. In the Logbook entry window, select the Day-Part



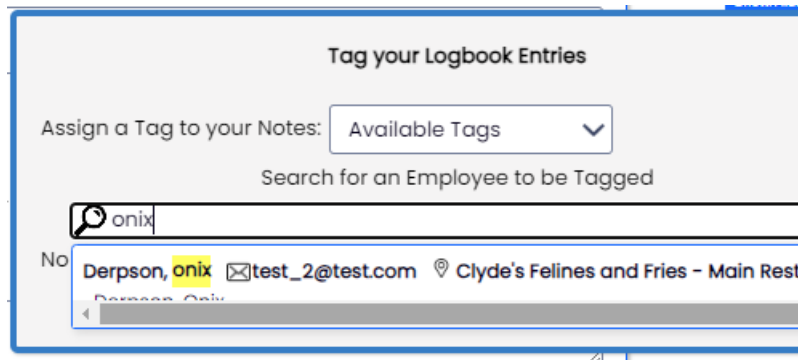
3. Enter Shift Notes under all applicable Topics



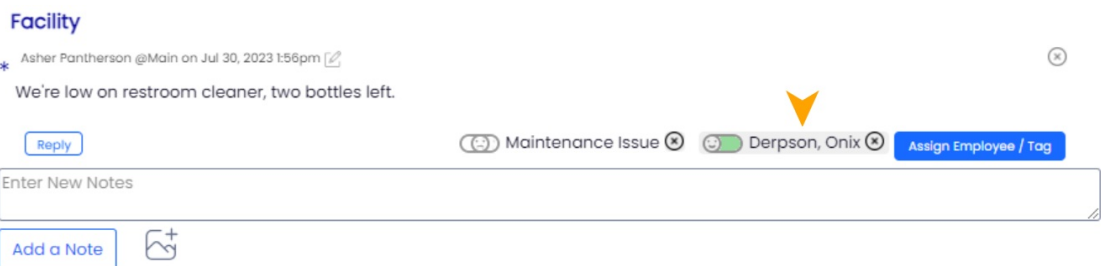
#### 4. Enter Tags (if applicable)



**EMPLOYEE Tags:** By Tagging an employee, the note becomes part of the searchable file of an employee.

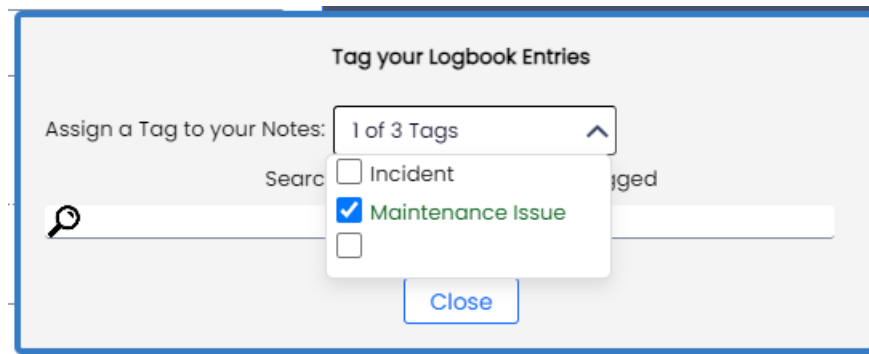


Tag will appear alongside the note



**GENERAL Tags** (as setup in Logbook Settings, or on the fly) can be used filtering in reports

Choose Tag from dropdown list in the Tags dialogue box



Tag will appear alongside the note

## Facility

\* Asher Pantherson @Main on Jul 30, 2023 1:56pm

We're low on restroom cleaner, two bottles left.

Reply

Maintenance Issue

Derpson, Onix

Assign Employee / Tag

Enter New Notes

Add a Note



## Mobile

*Notes to be updated shortly*

## Viewing Logbook Reports

From the Main Toolbar, click the Logbook Icon, set filters and **Show Report**

Logbook Pro Report

Custom Tags or Employee Tags can be added to a Topic Note for later searching

Jul 24, 2023 to Jul 30, 2023

2 of 2 Schedules 3 of 3 Day Parts Show Report

Assign a Tag to your Notes: Available Tags

Search Logbook Topics

Print Results

A Logbook Report will be Emailed daily (in keeping with Permission settings)

**NOTE:** Email reports can be turned OFF in an employee's Admin Alerts tab within their Employee Profile

Email Only (sent once a day)	
Alert Description	Schedules and Delivery Methods
Clock-In/Out ( <input type="radio"/> Changes-Only or <input type="radio"/> All ) Notes sent at End of Day	8 of 15 Alert Deliveries
Clock-In/Out ( <input checked="" type="radio"/> Changes-Only or <input type="radio"/> All ) Notes sent at End of Week	8 of 15 Alert Deliveries
Detail Daily / Weekly Analytics Email	8 of 15 Alert Deliveries
Rollup Daily / Weekly Analytics Email	7 of 10 Alert Deliveries
Daily Hourly Labor Email	8 of 15 Alert Deliveries
Daily Logbook Email	1 of 4 Alert Deliveries