

j5HandoverBook

What is the j5HandoverBook?

The j5HandoverBook is an electronic tool designed to effectively manage the information flow between outgoing and incoming shifts.

During the course of a shift, the Shift Operator or Supervisor keeps track of the many events and processes that occur. At the end of the shift, this information is entered into the j5HandoverBook. This is a clear and concise record of the key areas of the process that will be needed by the incoming shift operator or supervisor.

When the incoming operator or supervisor comes in, he or she has a clear and concise summary of the status of the process at the start of the shift, and can make informed decisions as to the course of action needed to maintain and improve the process.

Page navigation: Previous Day Previous Shift 2007-12-19_05:00 Next Shift Next Day Go to Date <input type="text"/> Go					
Filter: Edit Filter					
Save Changes Print View					
Audit Log for Deleted Rows					
Entry for 05:00 on 12/19 Delete Edit Print Audit Log					
Date	2007-12-19 05:00	Shift	Day	Shift Operators	admin
Turnover Complete	Yes	LogBook Reviewed	No	Alarms Reviewed	-
If No, Explain	Alarm Information not yet printed out				
Plant Status	On				
MW Load	980	Generator KV	970	Generator MVAR	54
Fuel Type	Petroleum coke	Pct Available	98	Generator AVR	Auto

Other users such as field operators, technical personnel and managers can also monitor the Handover Logs to see how the shift went.

The j5 Handover Log also provides a secure, searchable record of the status of the shift at handover which can be used for many other purposes such as the evaluation of process campaigns etc.

Please Note: The procedures and fields described below should be viewed as examples only. The system can be easily reconfigured to handle different scenarios to suit the actual requirements of a specific industrial site

- **Why go to an Automated Handover System**

The primary benefit to going to a networked Handover Log system is that all **the incoming shift workers start the**

Additionally, because the handover logs are visible to all, the **quality of the handover steadily improves** and the procedures are always carried out.

There is also a **clear record and audit trail of the handover** so that each operator knows his or her responsibility in the process. Once people are aware of their responsibilities, they take a pride in them and the quality of operations steadily improves.

The system is useful to different people in different ways. For example, an incoming maintenance manager would be interested in the maintenance fields while a supervisor would want to look at why there are continuing shutdowns in a given process stream.

The handover logs are maintained in an easily searchable database so that technical and managerial staff can easily locate specific handover records. For example, an engineer could find out where a particular problem started to appear by looking back through the handover logs.

- **What is a handover log made up of?**

The structure of a handover log may be tailored to be exactly what you need for your site. The j5 Handover Log Demo is designed as a generic starting point for a site's handover log which should be modified to suit your requirements. Here are some of the fields in the demonstration handover log.

- **Log Date and Shift:** This is the date of the handover log and the shift number that the handover log relates to.
 - **Area and Site:** This is the Process Area and the Site. A single j5HandoverBook application can handle many Process Areas over many sites if necessary.
 - **Shift Supervisor and Supervisor In:** This is (i) the name of the person who will enter the data for the current shift and (ii) the name of the person who will be taking over the shift respectively.
 - **Message:** This is a general purpose description of the shift and what to watch out for in the process.
 - **Active Permits:** This refers to the type and number of permits or tickets that have been issued during the shift. Supervisors should be aware of where and to whom the permits have been issued.
 - **Maintenance Complete and Maintenance On-Going:** This summarizes the maintenance issues that have been completed during the shift and the maintenance issues that are still being carried out.
 - **Process Shutdowns and Abnormal Operations:** These fields relate to any process shutdowns that had to occur during the shift and any abnormal operations that were carried out.
- **Handover Procedures**

To get an idea of the procedures in a typical Handover system, please start our on-line demo and click on the help link. Note that the procedures described in the demo should be viewed as examples only. The system can be easily reconfigured to handle different scenarios to suit the actual requirements of a specific industrial site.

- **Extensive Experience in the Industrial Field**

The j5 Handover Book is currently **in use by thousands of users in virtually every industry:** Power, Petrochemical, Chemical, Military, Health, Pipelines, Transport, Communications, Food, Scientific, and many other industries. The j5 system is scalable from a single standalone system to hundreds of users on a multi-server networked system. St James Software has a team of experienced engineers who have worked on Handover Books in these industries and can assist and advise in the setting up of Handover Books to meet your specific needs.

- **Minimal Administration**

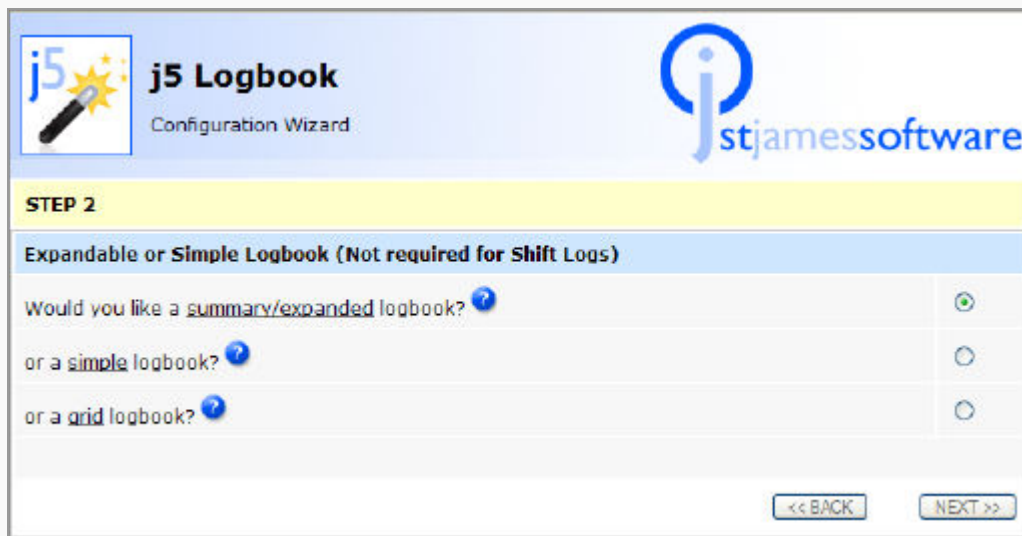
The Handover Book is a true web server based application. There is no requirement to load any software on any of the client machines. This means that the on-line logs can be quickly made available to tens or even hundreds of users without any changes to the user computers whatsoever.

- **Easy to start: Easy to change**

The j5 Handover Book package comes with a standard set up so that you can immediately implement it on your site with a minimum of effort. However, as you become familiar with the concepts of electronic logs, you will probably want to customize the application to your specific needs. This is a simple fill-in-the-blanks process that enables you to customize not only the look and feel of the Handover Book but also the structure.

- **Use the in-built wizard to quickly create new logbooks**

A new Handover Book to cover a new area, function or facility can be created by answering simple questions in a 6 step Wizard. Once created, you can go back to the Wizard to make fine tuning adjustments. New Handover Books can also be cloned from existing Handover Books which further simplifies the configuration process.



- **Change the Look and Feel of your LogBook**

Just change any of the presentation parameters and you will see the immediate effect of your changes. There are on-line tool tips for each of the categories to help you make the choices. There are over 50 different parameters that you can choose from to vary the presentation of the layout from window sizes to font sizes to color codes to the order in which the records appear etc. All of these changes can be achieved through a simple fill-in-the-blanks form without having to do any graphical design. Most of the entries are available as options in pull-down combos.

If you want to fine tune the presentation, for example, add some special formatting, you can edit the template directly. (It is in standard html format). This gives you the ability to add special properties and layouts and really make the Handover Book your own.

- **Add your own site-specific fields**

You can add your own fields that are specific to your business. Just go into the configuration, click on the new field button and enter the name and format of the new field. The system will take care of the database transactions for you and add a new column to the table. You can now fine-tune the characteristics of the new field such as the presentation of the field and what valid options there are for that field.

- **Attach any file to the Log Entries**

You can attach files of virtually any format to the Log Entries. (E.g. graphic files, Word or Excel files, Schedules, PowerPoint files, PDF files etc.) When the user clicks on the Attachment link, the application (e.g. Word) is started on his or her system and the information is immediately made available. This makes it easy to understand the context in which the log was made.

- **j5HandoverBook will automatically fill in the standard fields**

Your users do not have to fill in many of the standard fields like the time and date, console, shift number, and their user name. All these fields are filled in automatically by j5 Handover Book. Additionally, the system will not allow the users to enter data outside of their assigned areas and will only give them the choice of options that are in fact valid for their areas.

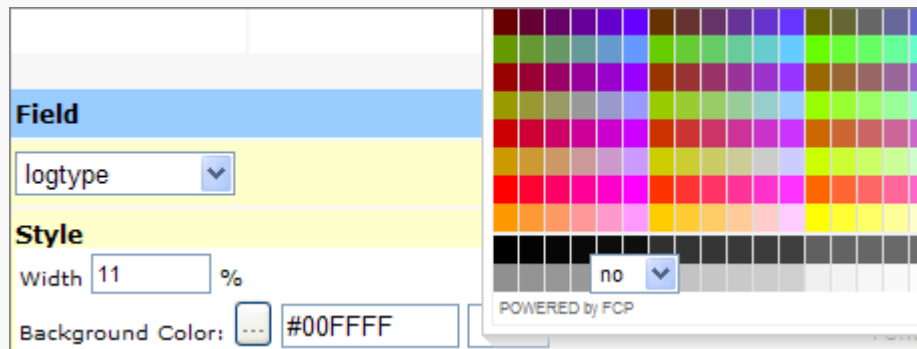
- **Choose the valid options for your fields**

You can specify the valid options for each of the fields. For example, for the priority field, you may specify the priorities 1 (emergency), 2 (warning) and 3 (standard). When the operator is adding a new log, these options are made available to him or her in a combo box. They are also made available when you want to filter the logs to find some specific information.

Actions	Event Time	Log Type	Event
Entry for 18:40 on 02/07 Adding Cancel Audit Log			
Event Date	02-07-2008 18:40		Message
Log Type	BLACKSTART OPERATIONS CEMS GAP GE PLC AB PLC BLACKSTART CITECT		Reported date
User Name	<ul style="list-style-type: none"> • Add an attach 		Plant

- **Associate the options of each category with different color and style codes**

To help your users easily identify the specific codes, you can assign colors and styles to these codes. For example, you can assign specific colors to the priority of the log, red for emergency, yellow for danger, etc. Likewise, you can assign colors to the different areas of the process, or colors to the different shifts. It then becomes clear for example when there is a shift changeover.



- **Powerful yet cost effective**

The pricing is based on the number of user sessions that are simultaneously active. For a site with say 100 people, you could purchase 5 or 10 concurrent licenses and make these available to all 100 users. You may also purchase packs of Logbooks if you want to extend your system. You can get a pricelist by [clicking here](#).

- **Add additional Sessions at any stage**

To add more concurrent sessions, you simply order and pay for the new session licenses and we send you an updated license key. The software already on your system will recognize the new license and activate the new sessions for you.

- **Each seat can have multiple users**

You can have as many users as you like on a given seat or viewing station. For example, if you have a system in the control room, you could have 5 different users for that one seat. Each user can have different personalities depending on their position in the organization.

- **Control who looks at j5HandoverBook and what they can see**

You can decide who looks at j5HandoverBook and exactly what they see. For example, you may want one user to be able to see everything on one site but only be able to enter information in the utilities area. You can also make users reenter their passwords when they add information. If you like, you can make the system automatically log off a user at the end of a shift or when they have been logged on for a certain length of time.

- **j5 maintains an easily accessible Audit Log**

The j5 system keeps a track off all the changes made to a log. Anyone can click on the Audit Log link on any log and immediately view all the changes made.

Entry for 16:40 on 01/21 Delete Edit Contract Print Hide Audit Log

Time	User	Action	Message	logid	reportdatetime	description	logdatetime	jusername	logtype	event
2008-01-21 21:44:04	admin	Edit		ID1200926402703000682911	2008-01-21 21:44:04	Normal Operations. We have brought the power back up to 100% No new disturbances being experienced Making final adjustments to the trimming on the south turbine.	2008-01-21 16:40:00	admin	Operations	Normal
2008-01-21 16:43:10	admin	Edit		ID1200926402703000682911	2008-01-21 16:43:10	A new check on the Power Presentation. Appears to be shifted.	2008-01-21 16:40:00	admin	Operations	Normal
2008-01-21 16:40:22	admin	Add		ID1200926402703000682911	2008-01-21 16:40:22	A new check on the Power Presentation	2008-01-21 16:40:00	admin	Operations	Normal

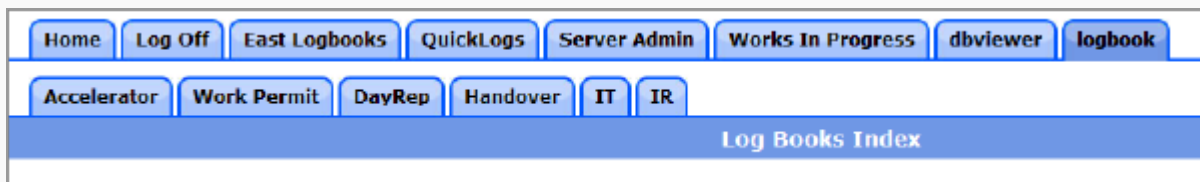
Logdatetime	2008-01-21 16:40	Comment	Normal Operations. We have brought the power back up to 100% No new disturbances being experienced Making final adjustments to the trimming on the south turbine.
Logtype	Operations		
Event	Normal		

- **j5 supports LDAP Authentication**

If you have an LDAP system, j5 will connect to this so your corporate security processes are automatically adhered to without you having to configure anything at all.

- **j5 supports multiple Handover Books**

You can add new Handover Books as and when they are needed. Once your operations Handover Book is installed, you may need maintenance Handover Book or a shift report or a Work Order Handover Book etc. There is no limit (based on your license) to the number of Handover Books that the j5 system will support. The j5 system will automatically generate the tabs (in an organized hierarchical fashion) so that your users can navigate easily to the Handover Book of interest.



- **On-line Help**

A comprehensive easy to use on-line help system is available from the j5 Handover Book. Browse through the system or go directly to a specific key word. There is also a tutorial that will help you get started. To make life even easier, there are many **screen casts** which will show you how to do each task that you want to carry out.

- **Connect multiple control rooms across multiple sites**

There is no limit to the number of control rooms you can have. In fact any of the users can enter information into the Handover Book if necessary. For example, let's say that the maintenance manager who is working in his office wants to make a log based on the availability of personnel after hours. He can do this directly into his desktop computer without having to go into the control room to enter the data.

- **Choose your Database**

Microsoft Access. Because all your data is stored in a standard database, you can access it with any of your favorite utilities such as Crystal Reports, Microsoft Excel, or the utilities that come with the database itself. Alternatively, you are welcome to download our free jWorkBook utility which gives you direct access to the database and the facility to create our own custom reports in the spreadsheet. For databases other than Oracle, SQL Server, MySQL, Postgres or Microsoft Access, please [contact us](#).

- **Internet Access**

Provided you have a Network connection (either Internet or Direct Connect or via modem) you can access the information.

The j5 Handover Book package produces a standard html output which can be viewed using any standard browser like Firefox or Internet Explorer. The logs are presented in tabular form and are updated as soon as a log is added anywhere in the system.

- **Your Operators will find it easy to use**

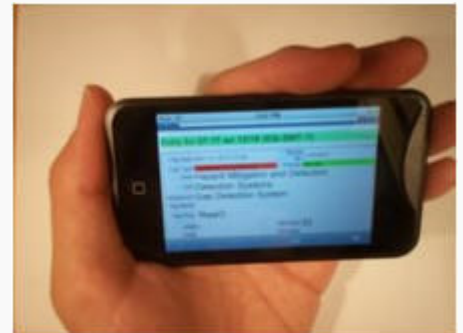
In our experience, operators do not have any problem in using the Handover Book. In fact, they quickly see the benefit of the Handover Book and are some of our most avid users. Why? Because it makes their lives easier! No longer do they have to receive phone calls from numerous parts of the plant asking for information and they can see the upstream and downstream processes without having to get on the phone themselves.

Additionally, many of the features of j5 Handover Book make it easy for operators to enter logs. For example, the time and date, user names, shift names and default values are added automatically by the system. Additionally, instead of having to enter fields manually, the user can pick many of the items from a list.

Finally, the operators soon realize that the Handover Book is an excellent vehicle for them to show their professionalism.

- **Use a PDA or the iPod to enter Field Information**

You can get logbook information while on site away from your desk using an iPod or iPhone. Likewise, your field operators or inspectors can enter data directly into the iPod while moving around the site. Emergency personnel too can get up to the second information on the current plant status without having to return to their desks.



- **Store as much data as you want**

There is no software limit to the number of records that can be stored or the number of days of data that can be stored.

- **Find the data easily and quickly**

Finding information is easy, just click on the Filter Button and type in the word or keyword you are looking for and the grid will show all the logs that match your specification. If you type in two criteria for different columns, then the log will show only those records that match both criteria.

There is also a "Google like" search facility which will search for keywords in all the columns of the database.

You can also use the in-built calendar to look for information within a certain time frame. (For example, find all the logs with the word opacity that occurred last month.)

Editing Filter: [Apply](#) [Clear Filter](#) [Close](#)

- Search string:
- Date field:
- Date start:
- Date end:

Save Changes Pr

[Add log entry](#) [Aud](#)

		January, 2008								
		<<	<	Today	>	>>				
wk		Sun	Mon	Tue	Wed	Thu	Fri	Sat		
52				1	2	3	4	5		
1		6	7	8	9	10	11	12		
2		13	14	15	16	17	18	19		
3		20	21	22	23	24	25	26		
4		27	28	29	30	31				
Time:				17 : 55						
		Select date								
		2008-01-21 16:43		Operations						

Event	
Abnormal	Getting a Checking
Normal	Opacity

Actions

[Delete](#) [Edit](#)

[Expand](#) [Print](#)

[Delete](#) [Edit](#)

[Expand](#) [Print](#)

- **Set your time window**

You can configure how far each user can look back when they first log on. For example, an operator will probably only be interested in the last day of information. Of course if they are interested, they can extend this information to view more information or choose a week of information say 3 months ago.

- **Export the logs to Excel or any other MS Package**

Since the data is in a standard database structure, you can use any of the normal tools to export the data. For example, if you have chosen Access as your database, you can get the information directly into an Excel spreadsheet by simply pointing to the Log table. Alternatively, download our free Excel Add-in jWorkBook. There are already examples in the tutorial that comes with the package to get you started in customizing your queries on the j5 Handover Book database.

- **Email specific logs to nominated stake-holders as they are entered (or modified) in the Logbook**

You can set up the system so that it will email nominate logs of interest to specific people as soon as a log is entered or modified. For example, you could specify that information on any logs that have a high priority in a selected area should result in an email to the supervisor of that area.

- **Control the editing of past logs**

Your operators may modify the records they have entered provided they make the changes within a 5-minute window of their data entry. If this five minute window (which is configurable) is exceeded, then the operators may not change the records they have entered.

- **Try out j5 Handover Book now**

You can try out j5 Handover Book immediately by [clicking here](#) . (This is a full Handover Book system that has had the Adding and Modification facilities removed for use on the open web.) Alternatively, you can download a version and test it (or tailor it to your requirements) on your own computer. To get the full download, just send a message to our system by [clicking here](#) .

- **Integrate your logs with historical data**

You can populate the Handover Book fields with **Real-Time data from any OPC source** using the in-built data reactor module. This module can be scheduled to add data to the Handover Book at the end of the shift for example. If required, the data reactor can store real-time values, averages, maximums or minimums.

- **Schedule your reports to be printed out in Excel Format**

You can also create Excel Reports with information from both the Manually entered data and the real-time data. These Excel reports can be populated, and then scheduled for printout and, if required, emailed to a list of end users. This functionality meets the requirement of most Federal and State Authorities.

Date	KPI 1					
	Raw		Applied		Finished	
	2H	Avg	2H	Avg	2H	Avg
1/5/2008	158.50	293.50	43.50	308.50	293.50	231.00
1/6/2008	148.50	171.00	31.00	121.00	171.00	191.00
1/7/2008	8.50	71.00	91.00	128.50	71.00	128.50
1/8/2008	101.00	53.50	183.50	43.50	53.50	173.50
1/9/2008	83.50	196.00	206.00	56.00	196.00	246.00
1/10/2008	298.50	163.50	303.50	28.50	163.50	221.00

- **Your current system will probably run j5 Handover Book without changes**

J5Handover Book comes in two versions, a St James Software Web based version and an **Apache** Server version. We recommend the St James Software Web Server version for systems requiring less than 30 concurrent users. For more than 30 users, (we have systems with several hundred concurrent users), we recommend the Apache server. Once the system is installed, any user on your network that has a web browser has access to the system.

- **Use a Standard Windows server or use an Open Source Linux Platform**

The server will run on **Windows or Linux** operating systems. Likewise, the clients may use any system that supports **Internet Explorer 6 or Firefox** or (shortly Safari) web Browsers. No additional software needs to be loaded on the client machines.

- **Automatically add logs from other application**

Since the database is an open database, you can set up your application to add the logs into the j5LogBook tables. Of course, you would need to have ensured that the application formats the information correctly so that the data is consistent with the requirements of the columns etc. Once this is done however, the "automatically entered" logs will appear alongside the normal operator logs.

Alternatively, you can use our **SOAP or RPC interface** which will ensure that the business rules are adhered to before a log is added to the system.

- **Choose a Handover Book from the j5 Suite of Off the Shelf Applications.**

There are various pre-configured j5 Handover Books in the j5 Handover Book Suite. **J5HandoverBook** manages the hand over reports between shifts. **J5Orderbook** specifically addresses the orders issued from the control room to field operators. **J5Knowledgebook** provides easy access to the Knowledge on a site. **J5InspectionRounds** can be used to manage the process of field operators that perform scheduled checks in the process. Various other applications too address the various common requirements of industrial sites. The j5 Handover Book Suite has many other applications from which you can choose from. Please [feel free to contact us](#) if you have a specific requirement.

- **Where to from here?**

We recommend as a starting point, you [try out our on-line demo](#) . You can also get more information by clicking on the Help Link in the toolbar.

We would recommend you try out our prototyping service. Just send us a rough specification of what you are looking for, and, at no charge, we will set up a Handover Book to these specifications on the web for you to trial. The prototype whitepaper in our Technical Papers section provides more information on this facility.

If you would like more information about us and all our products, have a look at our home page. There are also various technical papers on electronic Handover Books.

Alternatively, you can download the fully functional version which will function for a 30 day trial period. Of course, if you would like more specific answers, we would love to hear from you. You can [email us](#) or call us directly on our USA number **1 713 893 7152**.

Contact Details

United States of America

[Tel] 1-713-893-7153

[Fax] 1-425-795-1132

United Kingdom

[Tel] +44(0) 151 644 1407

[Fax] +44(0) 151 203 3138

[Mobile] +44(0) 788 777 0712

South Africa

[Tel] +27 21 782 0868

[Fax] +27 86 516 0075

[Mobile] +27 82 440 2965