How To Get Off Paper Records Today

The Problem:

Many operations are stuck on paper records: Paper log books, paper forms, visitor logs and more. Some have a hybrid approach to record keeping, where some things are kept in spreadsheets. These are archaic approaches to keeping operating records that keep operations in the dark, invite accidents or inefficiencies, and expose unnecessary compliance risks. What if I told you that there's a better way – an easy and cost-effective way to keep your operating records? One that you can implement, literally, today. One that doesn't require a large capital investment or a large amount of training or planning. The answer is LogBook, and you can explore it at trylogbook.com.

The Solution:

Here's how you can eliminate the burden and risk associated with paper operating records.

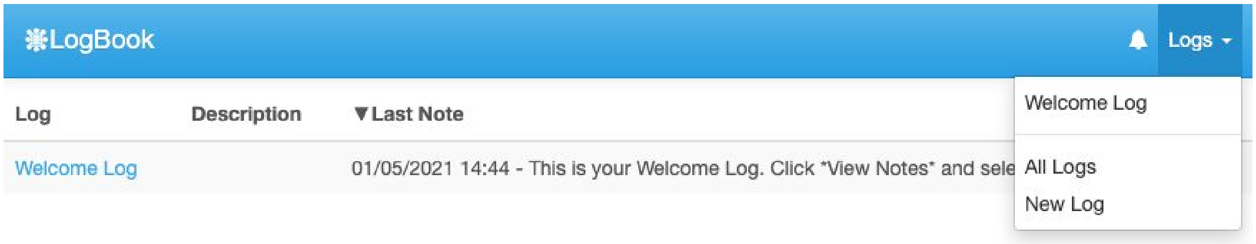
1. Adopt a cloud based, modern LogBook.
2. Begin to record all operating conditions and consequential actions taken in your LogBook, immediately, with unstructured content, like you write on your paper today.
3. Design templates to make frequent entries easier and faster to enter, while simultaneously making the data captured more accurate, legible and complete.
4. Design longer, more complex templates that will allow capturing longer form data during walkdowns, rounds or inspections.
5. Design a process for shift handover communication that will ensure that important information documented by prior shifts is communicated and acknowledged by incoming shifts.
6. Design custom reports and views to make finding information in your log fast and easy for everyone.

Believe it or not, steps 1 and 2 can be accomplished today and immediately. Here's how to get started.

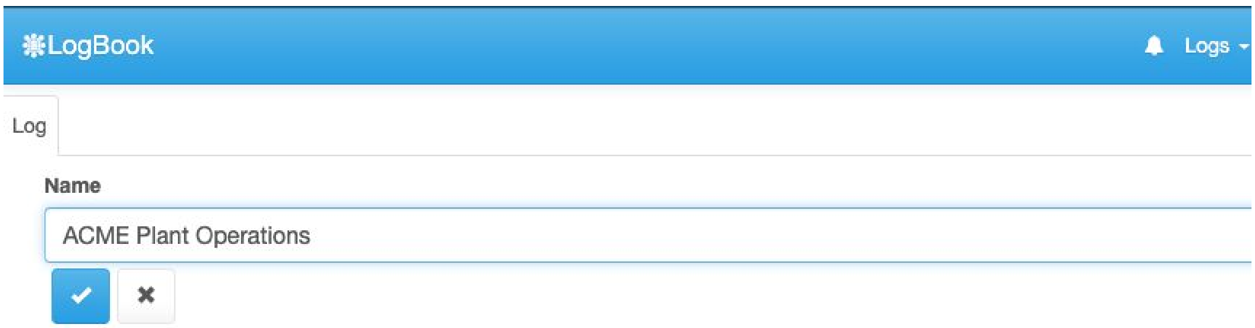
1. Sign-up for an account on LogBook.
    a. Go to trylogbook.com.
    b. Click on Sign-In in the upper right of the page.
    c. Click on Sign-up and complete the form, identifying yourself by your email address, and assigning yourself a password.
    d. You're in, but you have one final step to do, which is to go to your email (check the junk or spam folder, if necessary) and find the new account confirmation email from LogBook. Once found, click the Validate Email button in its body.

2. Create a Log for your operation.

a. Once in LogBook, use the Logs Menu to create a new Log.



b. Give your new Log a name, (i.e., use your plant or company name and a suffix indicating the content you'll put in the log, such as "AMCE Plant Operations").

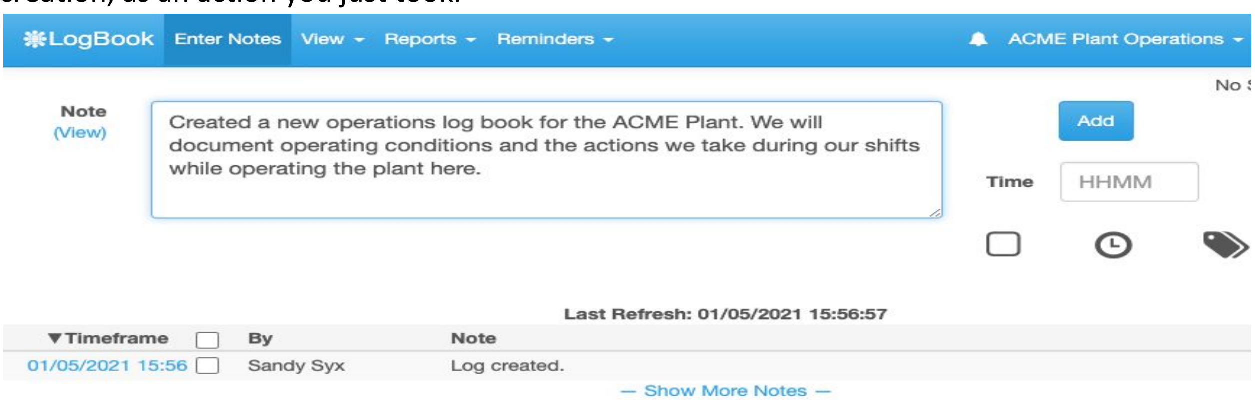


3. Begin entering Notes in your Log.

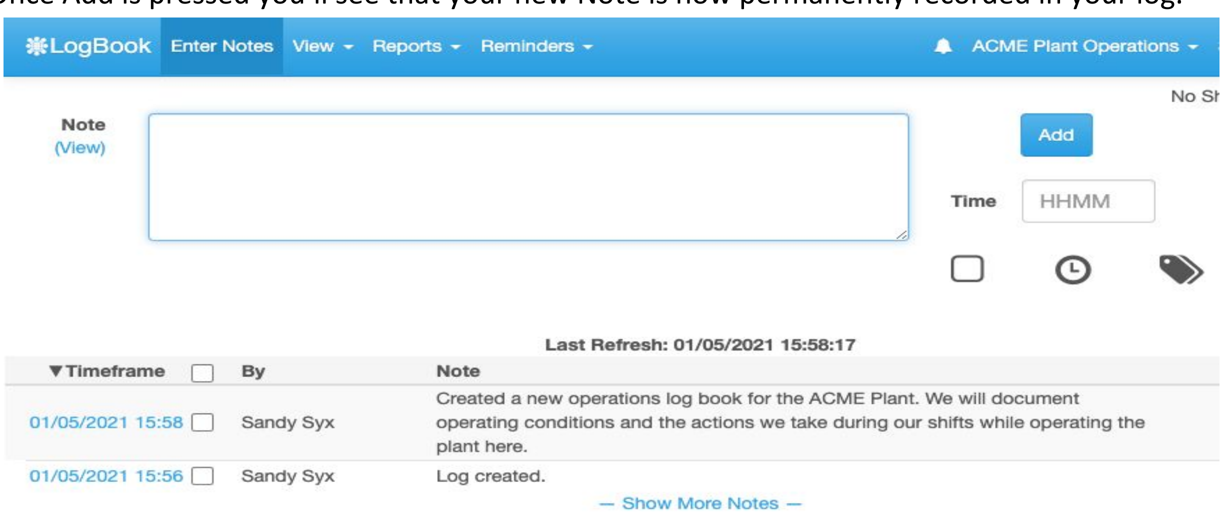
a. Use the Enter Notes page for your new Log to add a new Note documenting the new log's creation, as an action you just took.

b.

c.

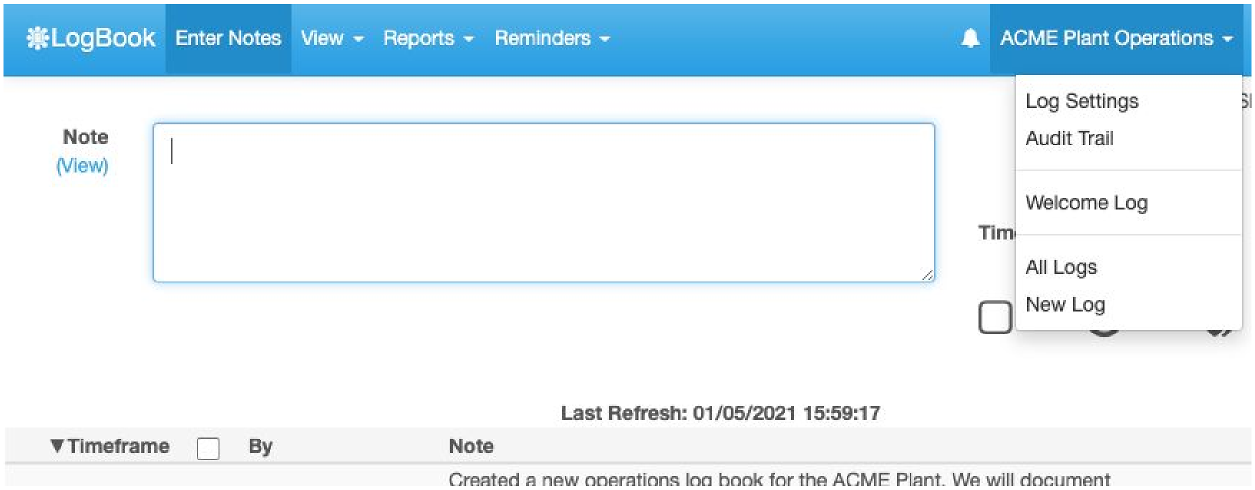


Once Add is pressed you'll see that your new Note is now permanently recorded in your log.

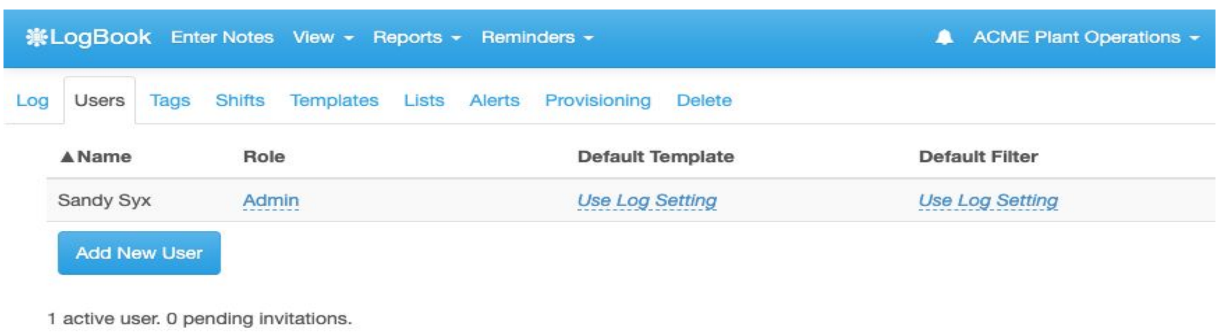


4. Invite others into your Log so they can collaborate with you.

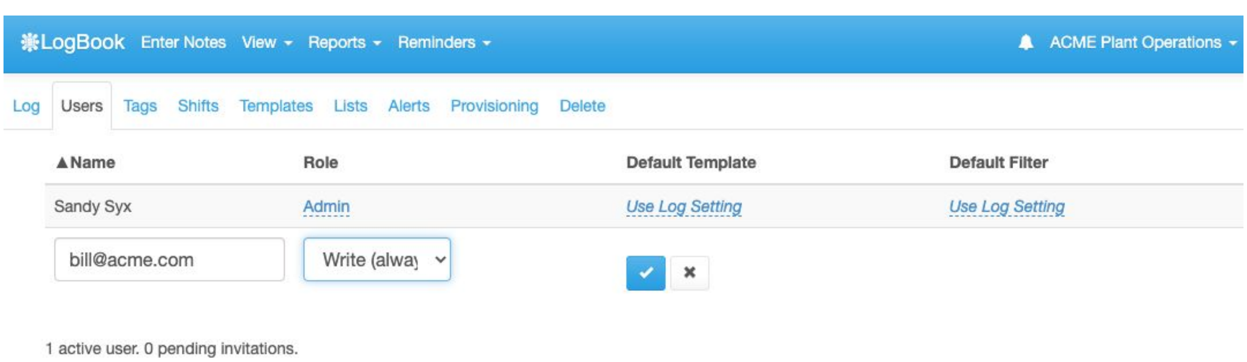
a. Go to the settings for your new Log by clicking on the Log's name in the top menu and then clicking the Log Settings menu item.



b. Go to the Users tab for the Log.



c. Add other users that need to view and/or add Notes to your Log. To add each user, use the Add New User button and provide the user's email address, and assign them a permission of either Write (always) or Read, we can discuss Write (on shift) later. Most users should not be granted Admin permission, as that permission allows complete control over the Log's setup, which is not generally appropriate for all users.

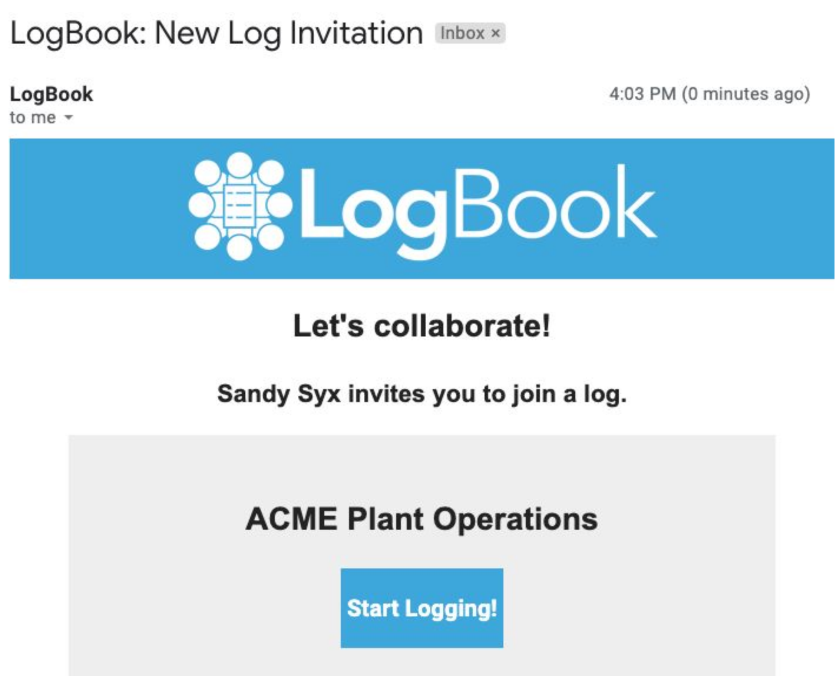


d. As each user is added they will be "pending" acceptance. LogBook will send the user an invitation to join your Log. The user will receive an email from LogBook that indicates that he/she has been invited to collaborate with you in your new Log.

5. Each user will click the Start Logging button in the email, which will take them through the steps to register their email address with LogBook, establishing a password, and ultimately allowing them access into your Log.
6. Confirm that the users you add can view the Log, that they can see the Notes you've made in the Log, and that they can add new Notes themselves.

Bam! You haven't even been to get another cup of coffee and you've already improved your operation by establishing a shared place to maintain your operating records.

At this point, we recommend using LogBook a little to get a feel for collaborating with it. As you do, you'll want to begin to customize it to your needs. Here, you have two options:



The Conclusion:

1. If you're a self-starter and you'd like to try things on your own, click the (?) icon in the upper right corner of the LogBook page to access its help, which is extensive. By reading the help, it's possible to learn about what it can be customized to do for you, but be forewarned, it can be a very long journey! This isn't a bad thing. It's just that each operating environment is unique; so, LogBook provides a lot of ways for it to be tailored

to fit different operating practices and needs. So, be patient. Set goals to make small improvements and work your way through learning about Templates, Lists, Tags, Shifts, Reports, Alerts, and much, much more.

2. This is our recommended approach! Contact us by either calling 1-205-413-8298 or by sending an email to info@trylogbook.com. We'd love to help you get started on the right track!

Good luck! You're on the right track to running a better operation, getting off paper records, and truly making your operation safer and better.