

# New Innovations (RMS) Log Books Training



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## Intro to Log Books

Log Books can be used to gather data not collected by other modules. For example, a department wants trainees to log reading assignments. The administrator could create a log book with text fields such as:

- Author
- Date
- Title
- Citation
- Date Logged

A log book can be shared with other departments. For example, the Department of Medicine could create a log book and shares with all of the Medicine sub specialties. However, unless a log book is shared with another department, only the people in the department where the log book was created can add and view entries. Log books can be configured to allow different work roles to view the entries.

## Access

The following privilege levels have access to the Log Books module:

**Level 6** - Configure module; Create & modify custom fields; View all department logs and reports; Add & modify logs

**Level 5** - Configure module; Create & modify custom fields; View all department logs and reports; Add & modify logs

**Level 4,3,2,1** - Add & modify own logs; View own log reports

## Creating Log Books

Log Books can be used to collect data that isn't captured in any other module in the software. Create custom fields and then put them together for the Log Book.

1. Go to **Logger > Log Books**
2. Click **Setup Log Books** in the top right corner
3. Click **New**
4. Enter a name for the log book
5. Select the work roles that can view and log entries to the log book. Keep in mind that checking these work roles does not allow that work role to add entries, only view them.
6. Select the departments that can view and log entries
7. Select the default fields that should be included:
  - Include - Makes this an 'Optional' field.
  - Make Required - Makes this a 'Required' field for users. They will not be able to save their Log Book until this field is completed.
  - Don't Include - This field will not appear in the Log Book.
8. Select the custom fields to 'Include' or 'Make Required' in this log book.
9. Click Save and Return
10. Custom Fields can be put into a specific order by using the 'Move Up' and 'Move Down' links after the page has been saved

The screenshot shows the 'Log Books Setup' interface. At the top, there are links for 'Save and Return' and 'Cancel and Return'. Below this, there is a 'Log Book Name' input field and a checkbox for 'Archive this Log Book'. A dropdown menu is open, showing a list of departments and divisions, including 'ICM Department', 'JG Internal Medicine', 'Anesthesia', 'Community Trauma Fellowship', 'Dental Medicine', 'Department of Medicine', 'Department of Medicine/DM-Cardiology', 'Department of Medicine/DM-Endocrinology', 'Department of Medicine/DM-Gastroenterology', and 'Department of Medicine/DM-Geriatric Medicine'. Below the dropdown, there are checkboxes for 'Work Roles able to view' with options for Administrator, Nurse, Physician Assistant, Faculty, Other, Resident, Medical Student, and Patient. The 'Default Fields' section contains a table with columns for 'Default Field Name' and 'Field Type'. The 'Custom Logger Fields' section contains a table with columns for 'Custom Logger Field Name', 'Field Type', 'Field Order', and 'Move Up/Down' links.

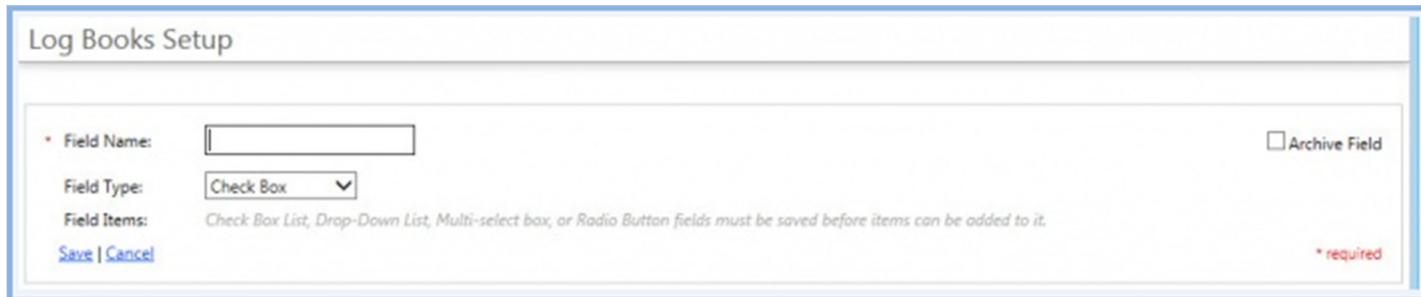
	Default Field Name	Field Type
<input type="radio"/> Include <input checked="" type="radio"/> Make Required <input type="radio"/> Don't Include	Date of Log	Date Box
<input type="radio"/> Include <input checked="" type="radio"/> Make Required <input type="radio"/> Don't Include	Logged By	Drop-down List
<input type="radio"/> Include <input checked="" type="radio"/> Make Required <input type="radio"/> Don't Include	Status	Drop-down List

Custom Logger Field Name	Field Type	Field Order	Move Up	Move Down
<input type="radio"/> Include <input type="radio"/> Make Required <input checked="" type="radio"/> Don't Include	Clinical Conditions	Drop-down List	0 (Not Used)	Move Up Move Down
<input type="radio"/> Include <input type="radio"/> Make Required <input checked="" type="radio"/> Don't Include	Color	Multi-select Box	0 (Not Used)	Move Up Move Down
<input type="radio"/> Include <input type="radio"/> Make Required <input checked="" type="radio"/> Don't Include	Confirmation Clarification	Radio Buttons	0 (Not Used)	Move Up Move Down
<input type="radio"/> Include <input type="radio"/> Make Required <input checked="" type="radio"/> Don't Include	Consent	Radio Buttons	0 (Not Used)	Move Up Move Down

## Adding Log Book Custom Fields

### Create a Custom Field

1. Go to **Logger > Log Books > Set Up Log Books** in the far right > **Custom Fields** tab
2. Click **New**
3. Enter the name of the field
4. Field Type. Select the type and enter the items for the field.
  - Check box – Check box is provided
  - Date Box – Calendar is provided
  - Radio Buttons – User may select only one option
  - Text Box – User enters text
  - Check Box List – User may select more than one check box
  - Drop-down List – User may select one item from a dropdown list
  - Multi-select Box – User may select more than one item from the list
5. Click **Save** and Return



The screenshot shows a web form titled "Log Books Setup". It contains the following elements:

- Field Name:** A text input field with a red asterisk indicating it is required.
- Field Type:** A dropdown menu currently set to "Check Box".
- Field Items:** A text area for entering items, with a note below it: "Check Box List, Drop-Down List, Multi-select box, or Radio Button fields must be saved before items can be added to it."
- Archive Field:** A checkbox labeled "Archive Field".
- Buttons:** "Save" and "Cancel" buttons at the bottom left.
- Required Field:** A red asterisk and the word "required" at the bottom right.

### Multi-Select Items

If you selected the Check Box List, Dropdown Lists, Multi-select Boxes or Radio Buttons, here's how to build the list of items:

1. Enter the first item in the list in the text box
2. Click Add New Item
3. Continue until all items have been entered.
4. Move them up and down on the list in the order they should appear
5. Use the Edit and Delete links to change or delete an item

## **Add Custom Fields to Log Book Forms**

1. **Go to Logger > Log Books > Set Up Log Books in the far right > Books tab**
2. Select one:
  - Click New to create a new Log Book
  - Click Edit to add the custom field to an existing Log Book
3. Scroll down to Custom Logger Fields
4. Select one:
  - Click Include to place the custom field on your form
  - Click Require to place the custom field on your form and make it mandatory before the user can save their Log Book.
  - Click Don't Include to remove a custom field from your form
5. Click Save and Return

## **Edit Custom Fields**

1. Go to Logger > Log Books > Set Up Log Books in the far right > Custom Fields tab
  - Click Edit beside the field to edit
  - Click Save

You cannot edit a custom field in use.

## Managing Log Books

Manage your log books by adding, editing or deleting entries and archiving books.

### Add an Entry

1. **Go to Logger > Log Books**
2. Click Add New Entry beside the Log Book you want to add an entry for.
3. Entering your information
4. Save your entry:
  - Save and Retain - Saves the entry and keeps the data on the page for continued logging
  - Save and Clear - Saves the entry and clears the data



Log Books				
Log Books				<a href="#">Set Up Log Books</a>
Log Book Name				
Elective Rotations	<a href="#">Add New Entry</a>	<a href="#">View Log Book Entries</a>	<a href="#">Generate Report</a>	<a href="#">Deleted (2)</a>
Patient Statistics	<a href="#">Add New Entry</a>	<a href="#">View Log Book Entries</a>	<a href="#">Generate Report</a>	<a href="#">Deleted (2)</a>
Remark	<a href="#">Add New Entry</a>	<a href="#">View Log Book Entries</a>	<a href="#">Generate Report</a>	<a href="#">Deleted (2)</a>
Resident Educational Activities	<a href="#">Add New Entry</a>	<a href="#">View Log Book Entries</a>	<a href="#">Generate Report</a>	<a href="#">Deleted (1)</a>

### View Log Book Entries

Log book entries can be viewed, edited and deleted.

To view the entries in Log Books:

1. **Go to Logger > Log Books**
2. Click View Log Book Entries for the specific Log Book
3. View all logs made in your program
4. Click Search These Entries to search by person and/or date range.

By default, only the date of the log, the name of the person who logged the entry and that person's status are shown. Use the “customizing your view” link at the top of the page to include all fields in the log book.

## Delete an Entry

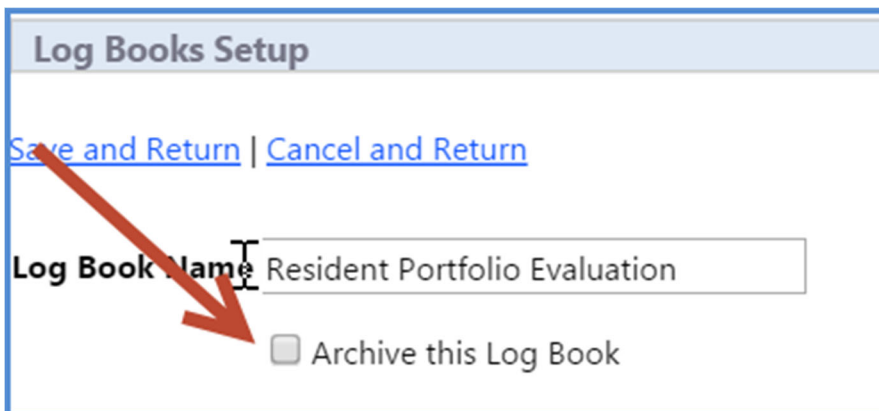
Log Book entries can be deleted by an administrator.

1. Go to **Logger >Log Books**
2. Click View Log Book Entries
3. Click Delete to remove an entry

A Log Book or Custom Field cannot be deleted if there are logs associated with it.

## Archive a Log Book

1. Go to **Logger >Log Books**
2. Click Edit beside the item to archive
3. Check the Archive check box
4. Click Save and Return



The screenshot shows a web form titled "Log Books Setup". At the top, there are two blue links: "Save and Return" and "Cancel and Return". Below these links is a text input field labeled "Log Book Name" containing the text "Resident Portfolio Evaluation". Below the input field is a checkbox labeled "Archive this Log Book", which is currently unchecked. A red arrow points from the "Save and Return" link down to the "Archive this Log Book" checkbox.

## Reporting on Log Books

You can see a count of how many entries a person has logged or view the details of each entry.

The reports do *not* tabulate the data in the entries.

### Generate report

Generate a report of Log Book entries by person and by specific dates:

1. **Go to Logger > Log Books**
2. Click **Generate Report** beside a Log Book
3. Select the person
4. Select one:
  - Show all dates
  - Specify Dates. Enter a date range for the report.
  - Click View Report

The Advanced Filters can be used to view only selected departments, entries by Work Role or include archived personnel.

The data in the report must be edited in the log book itself. Once the edits have been made, rerun the report to show updated information.