

Monthly register

Another Check-In · R03

Before the demonstration

Bertrand Hope

- Your assigned responsibility
- The correct training record
- Evidence of the result

Today's outcome

Learner separates register data, exported output and governed snapshot state.

Register selection

Bertland Hope

- Open Work > Monthly Register and set month/range, staff/unit, location/shift and weekend options

In this step

Choose the month or range and inspect the available staff, location, shift and weekend options. These selections define the report you are about to review. Record them when a register supports a formal decision.

Daily codes and totals

Bertrand Hope

- Read the daily codes and totals, then verify a known event/exception

In this step

Read the daily codes before relying on the totals. Trace one known exception back to its event and decision history. A total is easier to explain when you can show the daily evidence that contributes to it.

Live register exports

Bertland Hope

- Export CSV or XLSX and compare selected period/staff to the displayed register

In this step

CSV and XLSX exports represent the live register. Compare the selected period and staff with the screen. An approved snapshot has a separate evidence purpose and should not be replaced by a later live export.

Snapshot approval

Bertrand Hope

- With reports.approve create a snapshot, submit draft for review and approve under agreed governance

In this step

An authorized approver creates the snapshot and sends the draft for review before approval. Follow the organization's sign-off responsibilities. The software's state transitions do not by themselves establish an independent reviewer policy.

Lock and reopen

Bertrand Hope

- With reports.lock lock approved state
- demonstrate reopening/resubmitting only on a disposable training period

In this step

Locking and reopening require the corresponding authority. Changed report data can invalidate a transition and require a new snapshot. Follow the displayed state and preserve the history instead of treating approval as a permanent description of changing data.

Approved snapshot evidence

Bertrand Hope

- Live CSV and XLSX can change
- An approved snapshot records a specific version
- Use the authorized snapshot download

Check the snapshot

Approved or locked state

Valid stored hash

Your current reporting scope

Common problems

Berland Hope

- Assuming current export is the approved snapshot
- approving the wrong filters
- expecting supervisor to approve or manager to lock by default

A useful support report

The task and record

The expected result

The actual message

The authorized next step

Guided practice

Berland Hope

- Reader exports a prepared month; authorized approver identifies snapshot version/state; lock authority explains the changed-data and reopen path

Evidence to show

The correct training case

The result or permitted decision

Your explanation of the next step

Practice debrief

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- Correct context and permitted action
- A result you can trace
- A clear next step if blocked

Expected result

Learner separates register data, exported output and governed snapshot state.