

Dental Unit Utilization Recording Platform User Guide

2026-03-03

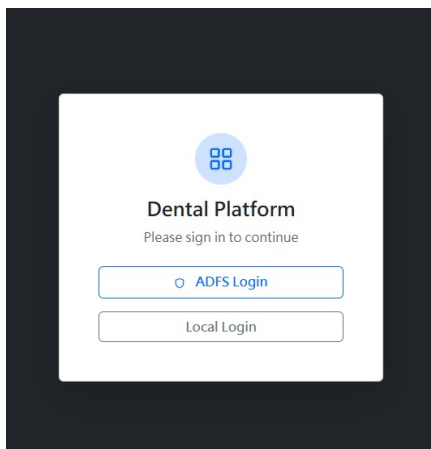
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Introduction

Welcome to the Dental Unit Utilization Recording Platform. This Platform is designed to record the usage of dental units in each session across various clinics. Access and features are based on your assigned user role (i.e. Data Inputter, Supervisor, Viewer or Platform Administrator).


General Navigation (All Users)

- **Login:** Access the system via ADFS (Single Sign-On) or use the "Local Login" option with your provided credentials.



After Login Success:

Dental Unit	AM	PM
S1		S
S2	D	
S3	D	
S4	D	
S5		S
S6		S
S7		S
S9	O (Outside Rent)	
S10	O (Outside Rent)	
B11		

- **Changing Password:** Click the key icon  in the top right corner to securely update **your local login password**.


After press  :

Change Password

Current Password

New Password

Confirm New Password

- **Logging Out:** Click the logout icon  in the top right to end your session securely.

1. Data Inputter Mode

Primary Role: Data Entry and Submission

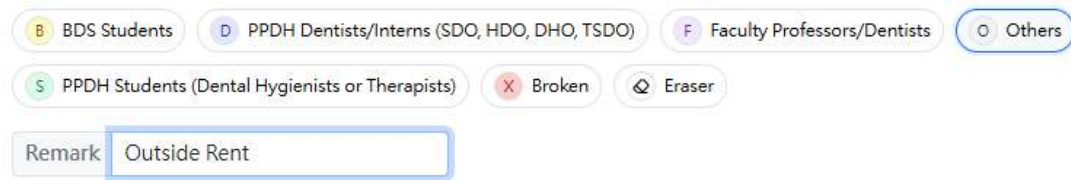
Data Inputters are responsible for logging daily utilization for their clinics; and have exclusive access to the **Daily Log** tab.

Recording Daily Utilization

1. **Select Clinic & Date:** Use the drop-down and date picker at the top to select the correct clinic and day.

2. **Select a Tool:** Click on a Utilization Type (e.g., "B" for BDS Students, "S" for PPDH Students) from the top toolbar.

Note: If you select "O" (Others), you **must** type a remark in the text box that appears before applying it.



To erase an entry, select the Eraser tool  and click a cell.

3. **Apply to Grid:** Click on the AM or PM slots for specific chairs to apply the selected tool.

Dental Unit	AM	PM
S1		S
S2	D	
S3	D	
S4	D	
S5		S
S6		S
S7		S
S9	O (Outside Rent)	
S10	O (Outside Rent)	
B11		

Pro-Tip: You can click and drag your mouse across multiple cells to batch-apply a code.

Fast Input Tools

To speed up data entry, use the quick-action buttons above the grid:



- **Fill AM / Fill PM:** Apply the currently selected tool to the entire AM or PM column.
- **Copy Prev Day:** Automatically pull in the log data from the previous chronological date.
- **Clear:** Erase all entries for the selected day.

Workflow & Submission

FAST INPUT: [Fill AM](#) [Fill PM](#) [Copy Prev Day](#) [Clear](#)

STATUS: Draft [Save Draft](#) [Submit for Approval](#)

Dental Unit	AM	PM
S1		S
S2	D	
S3	D	
S4	D	
S5		S
S6		S

- **Save Draft:** Click "Save Draft" to securely store your progress locally without submitting.
- **Submit for Approval:** Once the day's record is complete, click the blue "Submit for Approval" button. This locks the record and sends it to your supervisor.

FAST INPUT: [Fill AM](#) [Fill PM](#) [Copy Prev Day](#) [Clear](#)

STATUS: Submitted [Withdraw](#)

[Submitted for approval.](#)

Dental Unit	AM	PM
S1		S
S2	D	
S3	D	
S4	D	

- **Withdraw:** If you made a mistake after submitting, you can click "Withdraw" to return it to draft status (only if a supervisor has not approved it yet).

2. Supervisor Mode

Primary Role: Review, Approval, and Reporting

Supervisors oversee the data submitted by staff, ensure records are complete, and generate operational reports.

The screenshot shows the 'Dental Unit Utilization' interface for Clinic 1A on Monday, 02/03/2026. The status is 'Submitted'. The 'Daily Summary' shows a utilization rate of 25.0%, with 36 total sessions (27 empty, 9 used) and 0 broken.

Dental Unit	AM	PM
S1		S
S2	D	
S3	D	
S4	D	
S5		S
S6		S
S7		S
S9	O (Outside Rent)	
S10	O (Outside Rent)	
B11		
B12		

Managing Outstanding Records

- **Outstanding Tab:** This view highlights any working days where a clinic's log has not yet been submitted.

The screenshot shows the 'Outstanding Submissions' view for Clinic 1A in March 2026. The table lists dates from 2026-03-03 to 2026-03-12, all with a 'Pending' status and an 'Open' button.

Date	Clinic	Status	Action
2026-03-03	1A	Pending	Open
2026-03-04	1A	Pending	Open
2026-03-05	1A	Pending	Open
2026-03-06	1A	Pending	Open
2026-03-09	1A	Pending	Open
2026-03-10	1A	Pending	Open
2026-03-11	1A	Pending	Open
2026-03-12	1A	Pending	Open

- Filter by clinic or month at the top, and click **"Open"** on any pending row to jump directly to that day's log.

Reviewing and Approving (Daily Log)

1. Navigate to the **Daily Log** tab for a submitted record.

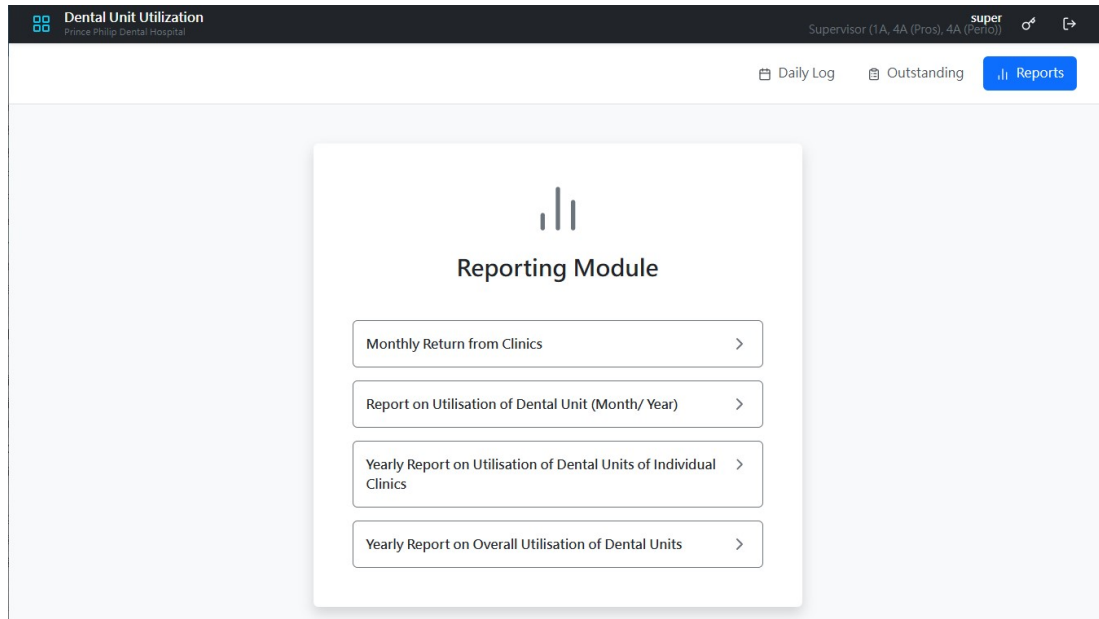
The screenshot displays the 'Daily Log' interface for a submitted record. At the top, there are tabs for 'Daily Log', 'Outstanding', and 'Reports'. The main header shows 'CLINIC 1A' with a dropdown menu open, listing '1A', '4A (Pros)', and '4A (Perio)'. The 'ENTRY DATE' is 'Mon 02/03/2026'. Below this, there are buttons for 'FAST INPUT: Fill AM', 'Fill PM', and 'Copy Prev Day', along with a 'Clear' button. The status is 'Submitted' with 'Reject' and 'Approve' buttons. A green banner indicates 'Submitted for approval.' Below this is a grid with columns for 'Dental Unit', 'AM', and 'PM'. The grid contains 10 rows (S1-S10). S1-S4 have 'D' in the AM column. S5-S7 have 'S' in the PM column. S9 and S10 have 'O (Outside Rent)' in the AM column. On the right sidebar, the 'Daily Summary' shows 'Utilization Rate 25.0%'. It also displays four statistics: '36 TOTAL SESSIONS', '9 USED', '27 EMPTY', and '0 BROKEN'.

Dental Unit	AM	PM
S1		S
S2	D	
S3	D	
S4	D	
S5		S
S6		S
S7		S
S9	O (Outside Rent)	
S10	O (Outside Rent)	

2. Review the staff's grid entries and the Daily Summary statistics on the right sidebar.
3. Click the green **"Approve"** button to lock the record into the database, or the red **"Reject"** button to send it back to the staff member as a Draft.

Generating Reports

- Navigate to the **Reports** tab to export Excel data.

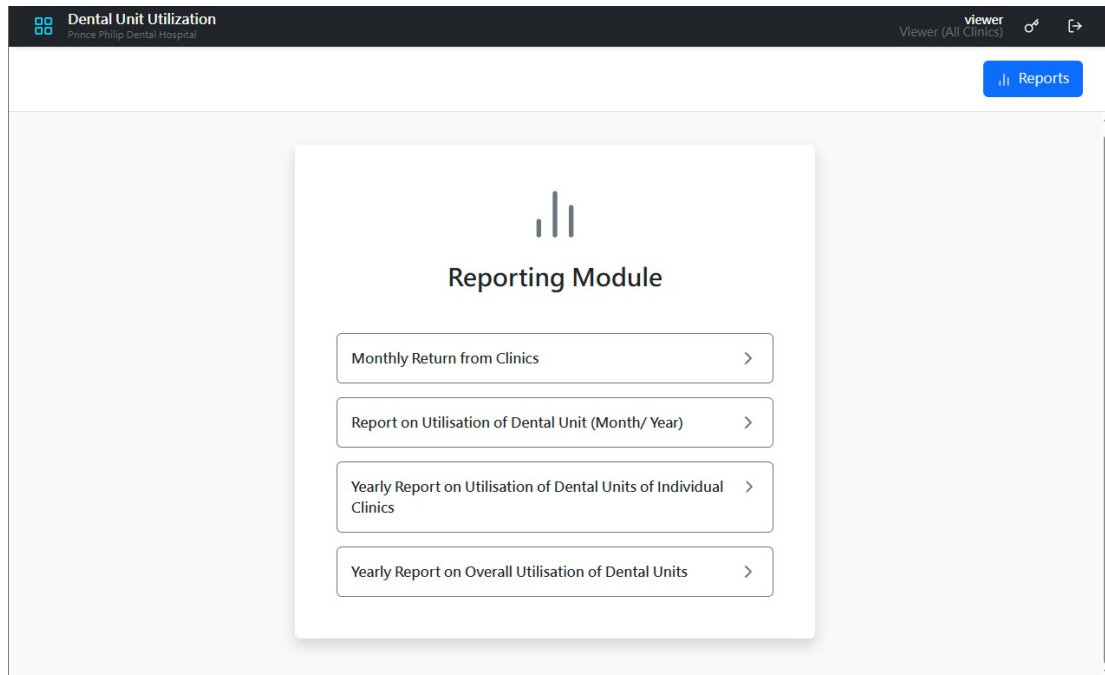


- You can generate four distinct reports:
 - **Monthly Return from Clinics:** Specific to a single clinic for a selected month.
 - **Report on Utilisation of Dental Unit (Month Year):** A platform-wide monthly summary.
 - **Yearly Report on Utilisation of Dental Units of Individual Clinics:** Multi-year historical data broken down by clinic.
 - **Yearly Report on Overall Utilisation of Dental Units:** Multi-year platform-wide aggregate data.

3. Viewer Mode

Primary Role: Read-Only Data Extraction and Reporting

The Viewer role is designed for stakeholders or external personnel who only need to review aggregated data without the ability to alter daily logs or system settings.



Strict Access Controls

- **Reports-Only Access:** Upon logging in, Viewers are immediately restricted and routed directly to the **Reports** module.
- **Restricted Navigation:** The navigation tabs for the Daily Log, Outstanding submissions, and Settings are completely hidden from Viewers. If a Viewer somehow attempts to access these areas, the system will automatically redirect them back to the Reports tab and display a "Restricted: Viewer access only" error message.

4. Admin Mode

Primary Role: System Configuration and Overrides

Platform Administrators have full access to all Staff and Supervisor features, plus the master **Settings** module to configure the platform.

The screenshot shows the 'Dental Unit Utilization' admin interface. At the top, there's a navigation bar with 'Daily Log', 'Outstanding', 'Reports', and 'Settings'. The main area displays 'CLINIC 1A' for 'Mon' on '02/03/2026'. Below this, there are filters for staff types: BDS Students, PPDH Dentists/Interns (SDO, HDO, DHO, TSDO), Faculty Professors/Dentists, and Others. There are also filters for 'Broken' and 'Eraser'. The 'FAST INPUT' section has 'Fill AM', 'Fill PM', and 'Copy Prev Day' buttons. The 'STATUS' is 'Approved' with an 'Unlock' button. A green message box says 'Approved and locked.' Below is a table with columns 'Dental Unit', 'AM', and 'PM', showing rows for 'B11' and 'B12'. On the right, a 'Daily Summary' panel shows a 'Utilization Rate' of 25.0% and four statistics: 36 Total Sessions, 9 Used, 27 Empty, and 0 Broken.

Overriding Records

- If a record has been fully approved but needs an emergency correction, Admins will see an **"Unlock"** button in the Daily Log to revert the status back to "Submitted".

This screenshot is similar to the previous one but shows the record in 'Submitted' status. The 'STATUS' is 'Submitted' with 'Reject' and 'Approve' buttons. The green message box says 'Submitted for approval.' The rest of the interface, including the navigation bar, filters, FAST INPUT section, and Daily Summary panel, remains the same.

Managing Settings

The screenshot shows the 'Dental Unit Utilization' interface for 'Prince Philip Dental Hospital'. The user is logged in as 'admin' with access to 'All Clinics'. The 'Settings' tab is active, and the 'System Users' sub-tab is selected. A table lists existing system users with their roles and clinic assignments.

Username	Role	Clinics	Actions
admin	Admin		EDIT DELETE
staff	Staff	1A	EDIT DELETE
super	Supervisor	1A, 4A (Pros), 4A (Perio)	EDIT DELETE
viewer	Viewer		EDIT DELETE
johnyeung	Admin		EDIT DELETE

Navigate to the **Settings** tab to access system configurations:

- **System Users:** Create new accounts, reset passwords, set roles (staff, supervisor, viewer, admin), and assign clinic access.

The screenshot shows the 'Add' form for a new system user. The form includes fields for Username, Password, Role, and Clinics. Below the form is a table listing existing system users.

Form fields:

- Username: admin
- Password: Password (Leave blank to keep)
- Role: Admin
- Clinics: 1A, 2A, 2B

Buttons: Cancel, Save

Username	Role	Clinics	Actions
admin	Admin		EDIT DELETE
staff	Staff	1A	EDIT DELETE
super	Supervisor	1A, 4A (Pros), 4A (Perio)	EDIT DELETE
viewer	Viewer		EDIT DELETE
johnyeung	Admin		EDIT DELETE

- **Calendar:** Add specific dates as "Holiday" or "Reading Week" (which affects report calculations). You can also batch-upload a calendar file (This file can be found in government website: <https://www.1823.gov.hk/common/ical/en.json>).

System Users **Calendar** User Types Type Groups Clinics Clinic Groups Dental Units

Calendar

08/04/2026 Reading Week Add

BATCH UPLOAD (JSON)

選擇檔案 未選擇任何檔案 Upload

Supports 'vcalendar' JSON format.

2026-04-03	Holiday	-	REMOVE
2026-04-08	Reading Week	-	REMOVE

- **User Types & Groups:** Define the utilization codes (e.g., 'B', 'D', 'F'), assign them display colors, and group them for reporting purposes.

System Users Calendar **User Types** Type Groups Clinics Clinic Groups Dental Units

Types Add

Code	Label	Type	Group	Status	Actions
B	BDS Students	Utilized	-	Active	EDIT DELETE
D	PPDH Dentists/Interns (SDO, HDO, DHO, TSDO)	Utilized	-	Active	EDIT DELETE
F	Faculty Professors/Dentists	Utilized	-	Active	EDIT DELETE
O	Others	Utilized	-	Active	EDIT DELETE
S	PPDH Students (Dental Hygienists or Therapists)	Utilized	-	Active	EDIT DELETE
X	Broken	Broken	-	Active	EDIT DELETE

System Users Calendar User Types **Type Groups** Clinics Clinic Groups Dental Units

User Type Groups Add

A1	DELETE
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- **Clinics & Groups:** Add new clinics and organize them into reporting groups (e.g. grouping 4A Pros and 4A Perio).

System Users Calendar User Types Type Groups **Clinics** Clinic Groups Dental Units

Clinics [Add](#)

Name	Group	Action
1A	-	EDIT DELETE
2A	-	EDIT DELETE
2B	-	EDIT DELETE
3A	-	EDIT DELETE
4A (Pros)	4A	EDIT DELETE
4A (Perio)	4A	EDIT DELETE
6A	-	EDIT DELETE

System Users Calendar User Types Type Groups Clinics **Clinic Groups** Dental Units

Clinic Groups [Add](#)

4A	DELETE
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- **Dental Units:** Add new chairs to specific clinics. **Drag and drop** the chair ID boxes to reorder how they display on the Daily Log grid.

System Users Calendar User Types Type Groups Clinics Clinic Groups **Dental Units**

Dental Units 2A [Add](#)

S1A

S1B

S2

S3

S4

S5

S6

B1

B2

B3

B4

B5

B6

B7

B8

B9

B10

B11

B12

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