Control Center User's Guide

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For use with the SupplySource® Automated Medical Supplies
Tracking and Distribution System
Control Center Application.

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Use of the MedSelect and SupplySource Systems, as well as all aspects of patient care, must still rely upon the professional skill and judgment of a competent medical professional, who should independently verify the accuracy and completeness of all pharmacological, medical, legal, or similar information entered into the system and the results obtained therefrom.

MedSelect products or their operation are covered by one or more of the following US patents: 5404384, 5533079, 5790409, 5848593, 5912818, 5957372, 5961036, 5971593, 5993046, 6019249, 6073834, 6108588, 6112502, 6141942, 6163737.

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Key Numbers

You should receive two standard keys for each cabinet. Each key should have a tag that indicates the key's cabinet and cabinet location. It is recommended that you store one key in a safe, secured place, and make the other key available to authorized users who may need it during power failures, etc.

Use the following chart to record your key numbers. For each key, record the location, tower, and key number.

You can also use this chart as part of your backup plan for distributing keys during a power failure or other event that prevents normal supply dispensing. In the **Key Taken By** column, record the name of the user who has taken a key, and use the **Out** and **In** columns to record the date/time. Be certain to inform your users of the policy and procedure for accessing SupplySource by using keys.

You may make copies of this chart to list additional departments.

Department ___________________________

Location	Tower	Key #	Key Taken By	Out	In

Department______________________________

Location	Tower	Key #	Key Taken By	Out	In

x Key Numbers

Department ___________________________

Location	Tower	Key #	Key Taken By	Out	In

Introduction to the Control Center

The Control Center is a windows-style software application that runs on your own networked PC. The Control Center allows you to enter, monitor, and modify data in the SupplySource database. This manual contains step-by-step instructions for using the Control Center to maintain and manage your SupplySource System, and it provides an administrative overview of all system components and functions.

You can perform the following tasks with the Control Center:

1. Define the characteristics of the supplies in your database
2. Assign supplies to SupplySource Towers
3. Create accounts for all system users, and assign activity privileges to each
4. Enter, monitor, and retrieve patient data
5. Customize and configure the system to meet your needs

SupplySource is provided with the number of Control Center licenses you purchased, and each application is installed on the computer you designated. To purchase and install additional Control Center applications, contact your MedSelect Sales Representative.

Overview of SupplySource

The following section is an overview of the SupplySource system, including a description of the components and their uses. An explanation of operating procedures, system care, and safety considerations follows the component descriptions.

Description of Components

SupplySource will include the following devices:

Display Terminal
The Display Terminal is a computer with a touch-screen display that makes it possible to dispense supplies for a selected patient, access supply and patient information, and restock the system inventory.

For more information on using the Display Terminal, see the *SupplySource Display Terminal Dispensing Guide*.

SupplySource Tower (SST)
The SupplySource Tower provides convenient yet controlled access to supplies. The Tower shelves can be configured in a variety of ways to provide a multitude of storage options.

Troubleshooting Tips

There is not usually a need to power off the system database server, except for servicing by authorized MedSelect service personnel. The following circumstances occur when a device is powered off:

- If only the database server is powered off, the Display Terminals continue to operate in an offline mode with limited functionality. Full functionality is restored when the database server is brought online. All windows on the Display Terminal display a red title bar to indicate that the server is not available.

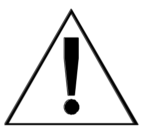
- If the IB Module is unplugged or powered off, dispensing from the Display Terminal is not possible.

Care of the System

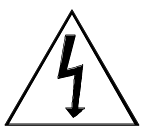
Do not use solvents, liquid cleaners or aerosol cleaners to clean any part of the SupplySource System. Use a soft, slightly damp cloth and warm, soapy water for cleaning cabinet surfaces. Use a soft cloth and a small amount of glass cleaner to clean the Display Terminal's touch screen.

Safety Precautions

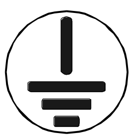
The SupplySource System is clearly marked to protect the user from possible injury or damage to the system. The following symbols may be found on system components:



The exclamation point inside a triangle indicates caution. When you see this symbol, refer to this instruction manual in order to protect against damage to the SupplySource System.

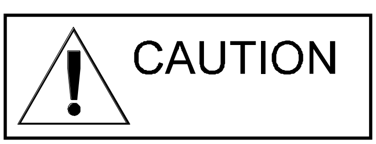


The lightning bolt inside a triangle indicates hazardous voltage inside. Do not attempt to open or access the interior of a device marked with this symbol.



This symbol indicates a circuit common connected to a grounded chassis.

The Warning label denotes a hazard. It calls attention to a procedure or practice which, if not correctly performed or adhered to, could result in personal injury. Do not proceed beyond a warning label until the indicated conditions are fully understood and met.



The Caution label denotes a hazard. It calls attention to an operating procedure or practice which, if not correctly performed or adhered to, could result in damage to or destruction of part or all of the product. Do not proceed beyond a caution label until the indicated conditions are fully understood and met.

Equipment marked with the label pictured below should not be opened by system users. Otherwise, system damage may occur.

Contact your MedSelect Service Representative for system service. There are no user serviceable parts in the SupplySource System. Equipment used in a manner not specified in this document by MedSelect Inc. may impair the protection provided by the equipment.

Electrical Requirements

This system requires a single-phase, three-wire, unswitched wall receptacle. A grounded, 3-prong power receptacle must be available for connecting main AC power to the Display Terminal, IB Module, and optional printer power Supply. In the event that your facility does not have adequate electrical outlets, use only a qualified electrical contractor to perform work on electrical circuits. Do not attempt to defeat the safety purpose of the grounding-type plug. You may need to consult the hospital's Engineering department before performing electrical work.

The power requirements of system components are as listed in the table below.

Device	Nominal Input Power	Max Power Consumption(VA)	Max Power Consumption Rating(W)
Printer (Epson)	115VAC, 60Hz, single phase	85VA	50W
IB Module	115VAC, 60Hz, single phase	135VA	80W
DT 2.0	115VAC, 60Hz, single phase	200VA	120W

Ventilation Requirements

There are no special ventilation requirements for the equipment covered by this manual, unless your system includes an optional Display Terminal printer. The printer's power supply is a separate unit and should never be covered or mounted in any way that restricts its ventilation louvers. Restricting air circulation around this unit could reduce its operating life.

Accessing and Tracking Supplies During Power Outages or Display Terminal Failures

If all power sources should fail and the Display Terminal becomes inoperable, you must open the dispensing cabinets with their proper keys. These keys should be secured by an authorized staff member who can make them available during a power outage (see page viii).

During a power outage, the system is not able to track inventory. You must keep track of supplies used and then adjust the system quantities when power is restored. You should work with your system administrator to develop a plan for manually recording supply usage during power emergencies.

Hardware and Software Requirements for Control Center Installation

The Control Center can be installed on a PC that is on the same network as the SupplySource server. The PC must meet the following requirements:

Components	Requirements
Microprocessor	Pentium 90 or higher
RAM	32MB of RAM or higher
Hard Disk	15MB to install and run the Control Center 85MB to install Examiner (50MB will be given back after the installation) 30MB to run Examiner Total required to run Control Center and Examiner =50MB
Video Monitor	EGA or higher
Operating Systems	Microsoft Windows 95, NT 4.0, or Windows 2000
Keyboard	Required
Mouse	A mouse is strongly recommended but not required

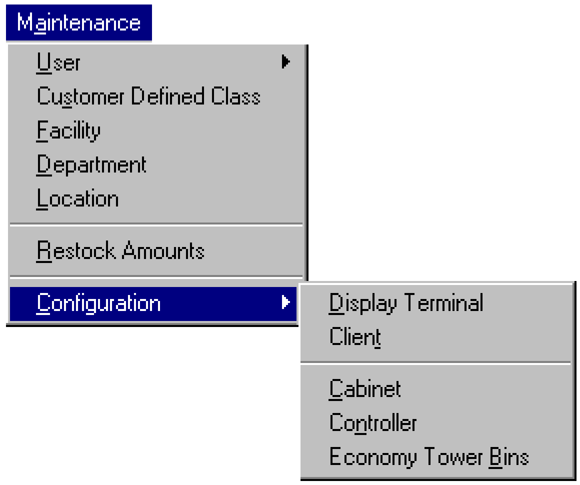
Do not install the Control Center on a computer running Windows 3.11 or any other version prior to Windows 95. The Control Center can only be installed by MedSelect service personnel.

Contacting the MedSelect Customer Support Center

MedSelect customer support is available 24 hours a day, 7 days a week, 365 days a year. If you have questions about SupplySource that are not answered by this document, you can contact the MedSelect Customer Support Center at 1-800-508-4576.

Part One: System Configuration at Installation

SupplySource *configuration* refers to the addition, removal, or modification of any system component. Part One of this manual is designed to be used by a MedSelect associate in assisting the system administrator with the configuration. It assumes the user is familiar with the Control Center, and is intended for use only by experienced system installers or administrators.



Login and Preparation

Before you can accomplish any work in SupplySource, you must log in to the Control Center, then add yourself as a system user and grant yourself all of the access rights you need to perform various high-level functions. If you already have a user account for yourself, you can skip to **Configuration Overview** on page 13. These instructions only work if the default administration login has never been used.

To login and add your own user record (new system only)

1. Start the Control Center.
2. Type your Username as **CCADMIN**.
3. Press the **TAB** key to move the cursor to the next line.
4. Type your PIN as **9999** then press **ENTER**.

   9999 is a default PIN. When you enter this, you are prompted to change the PIN. Change the PIN to a number only you will know. This new number you enter is the default administrator's PIN from now on.
5. Under the **Maintenance** menu, select **User**, then select **User Browser**.
6. Click the **Add** button.
7. Type the requested information about yourself in each field on the User Detail form. Be sure to enter the **Username** that you wish to use when logging in to the Control Center.
8. Select **all** of the user access rights in the right hand column.

   This gives you full access to all system functions. When you have become more familiar with the system, you may want to change your access rights.
9. Click the **Save** button to save changes.
10. Close down the Control Center application, then restart it.
11. Login with the new Username and PIN. The PIN is **9999**.
12. Follow the prompts to create your unique PIN number.

Configuration Overview

Defining the Areas in Your Hospital or Facility

SupplySource recognizes different areas of your facility by organizing them into locations and departments.

Locations - Areas in your facility where activity impacts SupplySource in any way. These could be patient rooms, stock rooms, storage closets, nursing stations, hallways, labs, etc. There may or may not be SupplySource devices in these locations (such as in a patient room).

Department - A collection of locations and Display Terminals. Departments can define attributes that can be set globally for all of the Display Terminals they contain.

To enter this information, it is best to work from the top down in the following manner:

1. Create departments first.

2. Add locations.

3. Add Display Terminals, choose a default location for each, and assign them to the departments.

4. Assign additional locations to the Display Terminals.

The following sections guide you through these steps.

Step 1: Creating Departments

Departments are divisions of your facility that may define unique attributes for the parts of the SupplySource System they contain.

To add a new department

1. Under the **Maintenance** menu, select **Department**.
2. Click the **Add** button on the toolbar.
3. Enter the department name and set each attribute as desired. For a description of each option, see **Department Maintenance Fields** on page 107.
4. Click the **Save** button on the toolbar.

To delete a department

1. Select the department from the department browser.
2. Click the **Delete** button on the toolbar.
3. You are asked to confirm the deletion. Click the **Yes** button to confirm, or click the **No** button to cancel.
4. Click the **Save** button on the toolbar.

   Note that the data is not removed from the database until you save.

Note: To protect the integrity of the database, you may not be allowed to delete a department if the department is currently active in the system or otherwise meets a condition that prevents the deletion. If such a condition exists, you are notified by a message window.

Step 2: Creating Locations

Locations are patient rooms, operating rooms, storage rooms, or any other area that must be monitored or tracked in any way by SupplySource.

Once you have added all of your locations to the database, you should assign them to Display Terminals. Adding Display Terminals is explained under **Creating Display Terminals** on page 17.

To add a new location

1. Under the **Maintenance** menu, select **Location**.

2. Click the **Add** button on the toolbar.

3. Enter the new location number and description.

   The location number must be unique, and can include letters as well as numbers.

   You can assign many locations to the same Display Terminal. Once a location has been assigned to a Display Terminal, any patients assigned to that location are shown on the Display Terminal that services the location.

4. Click the **Save** button on the toolbar.

To assign (or unassign) locations to one or more Display Terminals

If you have not yet added Display Terminals to the system, skip this section and go to **Creating Display Terminals** on page 17.

1. Select a location from the list, then click the **Display Terminals** button.

   The column on the left lists all Display Terminals. The column on the right lists the Display Terminals that are assigned to the location. If the Display Terminal name is followed by "Default", then the location is the default location for that Display Terminal.

2. To assign only specific Display Terminals, select each Display Terminal name from the column on the left, then click on the > button. The names you selected appear in the location's assigned list.

   To assign all Display Terminals to the location, click on the >> button.

3. To unassign specific Display Terminals, select each Display Terminal name from the column on the right, then click on the < button, or use the << button to unassign all.

   Note that you cannot unassign a Display Terminal from the location if it is the *default* location. Every Display Terminal has one default location, but may have additional locations. To change the default location, you must use Display Terminal Configuration (see page 17).

4. Click the **Save** button on the toolbar.

To delete a location

1. Select the location.

2. Click the **Delete** button on the toolbar.

3. You are asked to confirm the deletion. Click the **Yes** button to confirm the deletion, or click on the **No** button to cancel.

4. Click the **Save** button on the toolbar.

   Note that the data is not removed from the database until you save.

Note: To protect the integrity of the database, you may not be allowed to delete a location if the location is currently active in the system or otherwise meets a condition that prevents the deletion. If such a condition exists, you are notified by a message window.

Step 3: Creating Display Terminals

You must have Configuration access rights to add Display Terminals. If you have not yet added locations to the database, you should do so before adding any Display Terminals (see **Creating Locations** on page 15).

To add a Display Terminal

1. Under the **Maintenance** menu, select **Configuration**, then select **Display Terminal**.

2. Click the **Add** button on the toolbar.

3. Enter the following data:

   The node name is a unique name (up to 16 characters) that identifies this Display Terminal. This can be any valid TCP/IP node name. Examples of valid node names are DTORROOM or DTEYELAB. MedSelect encourages the use of DT as the first two letters of the node name. The node name can contain a hyphen or underscore, but cannot contain spaces or special characters. The node name must be unique.

   Select the department where this Display Terminal is located.

   Select the specific location for this Display Terminal. This location becomes the default location, but you can assign other locations as well. Note that if you change the default location, the old default location continues to be assigned to the Display Terminal as a non-default location.

   Enter the Display Terminal's assigned IP address, which must be provided by the hospital's Information Systems personnel.

   Select a logging level. This determines the level of detail that is recorded in the Display Terminal's error log. For details, see **Display Terminal Configuration Fields** on page 112.

   Check the **Receipt Printer** box if the Display Terminal has a receipt printer. Some Display Terminals may not have a printer.

4. Click the **Save** button on the toolbar.

To assign (or unassign) Display Terminal to one more locations

1. Select a Display Terminal from the list, and then click on the **Display Terminals** button.

   The column on the left lists all locations. The column on the right lists the locations that are assigned to the Display Terminal. One of these is identified as the default location. (To quickly locate the default location, select **Go To Default Location** under the **Data** menu.)

2. To assign only specific locations, select each location name from the column on the left, then click on the > button. The names you selected appear in the Display Terminal's assigned list.

3. To assign all locations to the Display Terminal, click on the >> button.

4. To unassign specific locations, select each location name from the column on the right, then click on the < button, or use the << button to unassign all locations.

   Note that you cannot unassign a location from a Display Terminal if it is the *default* location. Every Display Terminal has one default location, but may have additional locations.

5. To change the default location, select the name of the new default location you want from the column on the right, then choose the **Set As Default Location** option from the **Data** menu.

To delete Display Terminals

1. Select the Display Terminal.

2. Click the **Delete** button on the toolbar.

3. You are asked to confirm the deletion. Click the **Yes** button to confirm the deletion, or click on the **No** button to cancel.

4. Click the **Save** button on the toolbar.

   Note that the data is not removed from the database until you save.

Note: To protect the integrity of the database, you may not be allowed to delete a Display Terminal that has dispensing devices assigned to it. If such a condition exists, you are notified by a message window.

Step 4: Creating Cabinets

Locations must be in the database before you can generate create cabinets. Use Cabinet Configuration to add, modify, and delete the names of SupplySource Towers.

To add a cabinet

1. Under the **Maintenance** menu, select **Configuration**, and then select **Cabinet**.
2. Click the **Add** button on the toolbar.
3. In the **Cabinet Description** field, enter a description for the cabinet or area, for example, ER Tower 1, CCU Tower 3, ICU Tower 1, or CCU Tower 6.
4. Select a location from the drop-down list.
5. Click the **Save** button on the toolbar.

Step 5: Controller Configuration

Once you have added the cabinet name and location, you must enter the controllers contained within the cabinet.

If you have the Economy model of the SupplySource tower, you should create only Electronic Lock controllers—0C controllers (see the next page). After those are completed, move on to **Step 6** on page 25.

Creating a Controller for an SST Electronic Lock

Do the following to set up any electronic lock controller. You only have to create **one** Electronic Lock Controller for each SST:

1. Under the **Maintenance** menu, select **Configuration**, and then select **Controller**.

2. Click the **Add** button on the toolbar.

3. Enter the following data:

   Address is the number assigned to the processor chip on the controller (SST Electronic Lock controller names begin with 0C—zero C).

   Type Description is a description of the device, in this case SST Electronic Lock. This field is filled in automatically when you tab out of the Address field.

   Display Terminal is the name assigned to the Display Terminal that powers this controller. If the Display Terminal you want is not listed, then you must add it using Display Terminal configuration.

   Cabinet Description identifies the cabinet that contains this controller. Choose the description from the drop-down list. If the cabinet you want is not listed, you must add the cabinet using Cabinet configuration.

   Sequence Number is the number that describes the *physical order* of controllers in a cabinet. An SST Tower can have only one Electronic Lock controller. This field is filled in automatically.

   Controller Configuration is the number sequence (1-1-1-1, 1-1-2, 1-2-1, 1-3, 2-1-1, 2-2, 3-1) that describes the configuration of the Electronic Locks (doors) attached to the controller.

4. Click the **Save** button on the toolbar.

Creating a Controller for an SST Shelf

Controller configuration for an SST Shelf is similar to an SST Lock, but requires that you specify the shelf number and the way the shelf is divided. To add a controller of this type, use SST Lock Controller Configuration but observe the following differences:

1. The **Address** must begin with 0D (a zero and the letter D).

2. The **Sequence Number** must be filled in. The **Sequence Number** is the shelf's position number in the cabinet, starting at the top. The maximum number of shelves is 16. Tab to open the **0D Shelf Controller** dialog.

   In the **0D Shelf Controller** dialog, the shelf is divided into 18 shelf positions by default (the maximum number possible). See below for shelf configuration instructions.

3. The **Controller Configuration** field defaults to 18 (the maximum number of shelf positions).

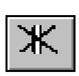
4. Click the **Save** button on the toolbar.

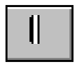
Note: Do not create 0D controllers if you are configuring an Economy Tower, create 0C Controllers and move on to **Step 6: Adding Bins to SST Shelves (Economy model only)** on page 25.

To configure a 0D shelf

When the 0D Shelf Controller dialog opens, it defaults to the maximum number of shelf positions (18) and a "Pull Out" shelf type.

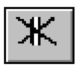
To Configure a "Pull Out" Shelf:

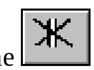
1. In the 0D Shelf Controller dialog, choose the **Shelf Type** as **Pull Out**.
2. The shelf will be defaulted to the maximum number of positions (18).
3. Click the  button to remove shelf dividers. Note that the shelf indicator buttons on the Button Bar in the dialog will change accordingly.

4. To put a divider back, click the  button.
5. Click **OK**.

To Configure a "Fixed" Shelf:

1. In the 0D Shelf Controller dialog, choose the **Shelf Type** as **Fixed**.

   In addition to the  buttons, pull-down menus will appear at the bottom of each shelf division.

2. First, configure the vertical dividers with the  buttons. Then, choose the horizontal dividers with the pull-down menus.

   If you choose:

1-1-1	**The row will be divided in thirds.**
1-2	**The row will be divided in 2—with the front section 1/3 of the row and back section 2/3.**
2-1	**The row will be divided in 2—with the front section 2/3 of the row and back section 1/3.**
3	**The row will have no horizontal dividers**

   Note that the shelf indicator buttons on the Button Bar will change accordingly.

3. Click **OK**.

Step 6: Adding Bins to SST Shelves (Economy model only)

If you are setting up an Economy SupplySource tower, you will need to configure the Economy Tower Bins after you have created your cabinets (Step 4) and your SST Electronic Locks (Step 5).

To configure economy tower bins

1. Under the **Maintenance** menu, select **Configuration**, and then select **Economy Tower Bins**.

2. From the **Cabinets** pull down menu, choose the SST you would like to configure.

3. From the **Doors** list, choose the door that contains the shelf or shelves you would like to configure.

4. Click the **Auto-Generate** button, and specify the number of bins you need. The number of bins you requested will be created.

   You can also create bins by clicking on the **Add** button. Each click on the **Add** button will add an additional bin.

   Bins can be deleted by using the **Delete** button. Choose the bin you would like to delete and click the **Delete** button.

5. Click the **Save** button on the toolbar.

Changing the System Configuration

You need to reconfigure SupplySource whenever a Tower is added, removed, or replaced. You may also need to edit names or make other changes that could occur when some part of the facility is changed or renamed.

Removing System Components

You can remove a SST or controller by opening a configuration window and deleting the component.

Deleting SupplySource Towers
When you delete a SupplySource Tower, all associated controllers and positions are also deleted. However, you cannot delete a device or area if there are supplies assigned to its positions. Unassign all supplies before deleting.

To delete a SupplySource Tower

1. Under the **Maintenance** menu, select **Configuration**, and then select **Cabinet**.

2. Select the cabinet you want to delete.

3. Click the **Delete** button on the toolbar.

   You are asked to confirm the deletion. Click the **Yes** button to confirm, or click on the **No** button to cancel. You may have to confirm more than once.

Deleting Controllers

Deleting a controller causes all associated positions to be deleted. You cannot delete a controller if there are supplies assigned to its positions. If you know you want to delete all of the controllers in a SST, it may be quicker to delete the entire cabinet, which also deletes all of its associated controllers. To delete a cabinet, see **Removing System Components** on page 26.

To delete individual controllers without deleting the cabinet

1. Under the **Maintenance** menu, select **Configuration**, and then select **Controller**.

2. Select the controller you want to delete.

3. Click the **Delete** button on the toolbar.

   You are asked to confirm the deletion. Click the **Yes** button to confirm, or click on the **No** button to cancel. You may have to confirm more than once.

Deleting a Display Terminal

You cannot delete a Display Terminal unless all of its associated controllers have been deleted. See **Deleting Controllers** above. To delete a Display Terminal, follow these steps:

1. Under the **Maintenance** menu, select **Configuration**, and then select **Display Terminal.**

2. Select the Display Terminal you want to delete.

3. Click the **Delete** button on the toolbar.

   You are asked to confirm the deletion. Click the **Yes** button to confirm, or click on the **No** button to cancel. You may have to confirm more than once.

Replacing System Components

The requirements for replacing a system component vary by component. The following instructions explain how to replace each SupplySource component.

Modifying or Replacing a Controller

The following rules apply when modifying or replacing a controller:

1. You can swap out an old controller and replace it with a new controller *only if the controllers are the same type*. This means that the two controllers must have the same 2-digit prefix in their address. For instance, you can replace a SST Lock controller with another Lock controller (prefix of 0C). You can replace a SST Shelf controller with another Shelf controller (prefix of 0D).

   To replace a controller, you must first delete the unwanted controller, then add the new controller. To delete a controller, see **Deleting Controllers** on page 27. To add a controller, see **Controller Configuration** on page 21.

2. You can replace a controller with another of the same type without unassigning supplies only if the new controller has the exact same configuration as the old. When you do this, you change only the controller address in the database; all other information remains the same.

3. If you want to change a controller's configuration, you must unassign all supplies for that controller. For instance, if you want to change a controller that supports a SST Shelf with 18 compartments so that it supports a SST Shelf with 2 compartments, then you must unassign each of the supplies in the 18 compartments. You can then modify the controller's configuration in the database (including the address, if you want to simultaneously swap the controller and change the configuration).

To modify or replace a same-type controller

1. Under the **Maintenance** menu, select **Configuration**, and then select **Controller**.

2. Select the controller you want to modify or replace.

3. Under the **Data** menu, select **Modify Controller**. A Modify Controller window opens.

4. Change the data to match the new controller.

   If the controller has supplies assigned to it, then you are only able to edit the address of the controller (the 2-digit prefix cannot be edited to ensure that this controller *type* remains the same). If not, then you can modify everything but the description, which is created automatically based on the prefix to the address.

Replacing a SupplySource Tower
To replace a SST, you must first delete the unwanted SST, then add the new one. To delete a SST, see **Deleting SupplySource Towers** on page 26. To add a cabinet or area, see **Creating Cabinets** on page 20.

If a SST is being replaced with another SST and you plan to keep the old cabinet name, you could keep the old cabinet name in the database and change only the controllers assigned to the SST.

Replacing a Display Terminal
If a Display Terminal is replaced, the new Display Terminal should be given the same node name as the old Display Terminal. If this is done, no change is needed at the Control Center. The new Display Terminal should function properly. A Display Terminal should only be replaced by authorized MedSelect service personnel.

Client Configuration

Client Configuration is used to identify clients such as the Nursing WorkStation (NWS), Restocking WorkStation (RWS), etc. These software applications are not currently components of the Control Center, but can be run on the same PC as the Control Center.

You must have Configuration access rights to add clients. If you have not yet added Departments to the database, you should do so before adding any clients (see **Step 1: Creating Departments** on page 14).

To add a client

1. Under the **Maintenance** menu, select **Configuration**, and then select **Client**.

2. Click the **Add** button on the toolbar.

3. Enter data in each field on the form. For details about the information used on this form, see **Client Configuration Fields** on page 105.

4. Click the **Save** button on the toolbar.

To delete clients

1. Select the client.

2. Click the **Delete** button on the toolbar.

   You are asked to confirm the deletion. Click the **Yes** button to confirm the deletion, or click on the **No** button to cancel.

3. Click the **Save** button on the toolbar.

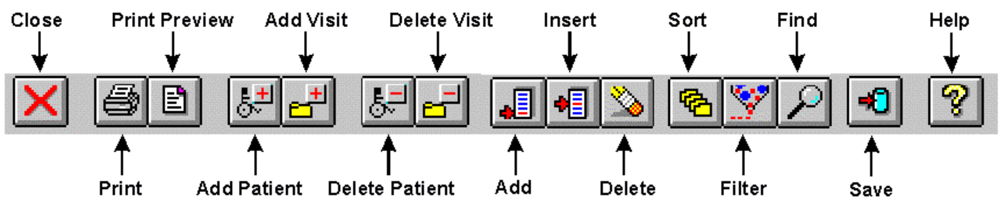
   Note that the data is not removed from the database until you save. When you delete a client's configuration, that client continues to run normally if it was already in use. When that client application is closed, it is not possible to restart the client until a new configuration is added at the Control Center.

Part Two: Information Management Using the Control Center

SupplySource administration is performed using the Control Center. The Control Center is an application you can run on almost any personal computer that can run Microsoft® Windows™ 95, 98 or 2000, and is on the same network as SupplySource. You use data entry forms to enter information about patients, system users, and inventory. This information is processed and stored by the database server, and can be retrieved whenever you need it. You can view or print a variety of reports that display the information you need to accomplish specific tasks such as restocking.

Control Center Standard Tools and Features

Toolbar
Depending on the window you are viewing, the Control Center toolbar may contain any of the following buttons:



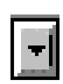
Close	Closes the current window.	**Add**	Adds a new item to the list or form you are viewing.
Print	Prints the contents of the current window (report, browser, etc.).	**Insert**	Inserts a new item directly above the currently selected item in a list.
Print Preview	Shows a preview of a printout on the screen, or cancels print preview.	**Delete**	Deletes the currently selected item from the list you are viewing.
Add Patient	Adds a Patient (when viewing the Patient browser or Patient Detail).	**Sort**	Activates the Sort feature.
Add Visit	Adds a Visit (when viewing the Patient Detail).	**Filter**	Activates the Filter feature.
Delete Patient	Deletes a Patient (when viewing the Patient browser or Patient Detail).	**Find**	Activates the Find feature.
Delete Visit	Deletes a Visit (when viewing the Patient Detail).	**Save**	Saves the current entry.
		Help	Activates the online help.

Positioning the Toolbar
You can reposition or remove the toolbar from the screen by right clicking on the buttons. This opens a list box of several options. To remove the toolbar, select **Sheetbar**. The toolbar is removed until the next time you open a new window (by opening a browser, detail, etc.). To reposition the toolbar, select **Left**, **Top**, **Right**, **Bottom**, or **Floating**. If you select floating, the toolbar becomes its own small window.

Identifying a Button
When you place the pointer over a button and leave it there, a small pop-up message indicates the name of the button. You can also change the button style so that the button always displays the name of its function. To do this, right click on the buttons, then select **Show Text**.

Radio Buttons
Radio buttons allow you to choose an exclusive item. They are called radio buttons because they work like station select buttons on a radio. Only one can be chosen at one time. Radio buttons are usually round, and the selected button contains a filled center. The other buttons are empty.

Drop-down lists
A drop-down list is a list of valid items that may be inserted into a data field. Drop-down lists usually contain information that is entered on another form. Drop-down lists are indicated by a button with an arrow pointing downward.



Click on this button to open the list, which appears to "drop-down" from the field. Click on one of the items in the list to insert it into the field. *When a field uses a drop-down list, you can only insert information from the list. You cannot type information into a field that contains a drop-down list.*

Browsers
A browser is a form that presents a list of names or items, usually for the purpose of performing some action or retrieving more detailed information on an item in the list. Browsers such as the patient browser, supply browser, and user browser contain abbreviated information on patients,

supplies, and users, respectively. Double-clicking on one of these items opens a detailed form that shows more specific information about the item you chose.

Some browsers contain information that can be edited directly on the browser. Other browsers only show information that must be added, edited, or deleted by using a detail form. For instructions on using a particular browser, see the explanation of the form that contains the browser.

Detail Forms
A detail is a form that displays details about a specific item or person. For instance, a patient detail shows personal details about the patient, such as address, birthdate, etc. Detail forms are often accessed by choosing an abbreviated description of the displayed item on a browser.

Required Fields
A detail or browser often contains required fields, which are fields that must be filled in, and optional fields, which may be left blank but provide helpful information when used. Required fields are indicated by boldface type.

Editable and Non-editable Fields
Any field on a detail that has a white background can be edited. Fields with a dark background cannot be edited. Non-editable fields usually contain information that is either entered by the system automatically or is displayed for information purposes only.

Using the Tab key to move from one data field to the next
When working on a detail or browser, the Tab key causes the cursor to move from one field to the next. The Enter key does not perform this function.

Printing Functions
You can print information on browsers, details, or reports by clicking on the **Print** button on the toolbar.

Double-clicking vs. Click/Select Button
Any function that is performed by first selecting an item, then clicking on a button, can also be performed by double-clicking on the item. For example, you can open a patient detail by selecting a patient from the patient browser, then clicking on the **Patient Detail** button. However, you can also double-click on the patient name in the patient browser to open the detail.

Check Boxes

Check boxes indicated whether an option is selected or not. When an option is *not* selected, the check box is empty. When an option *is* selected, the box contains a checkmark.

Toggling Between Open Windows within the Control Center Application

You may want to have several windows, such as a Patient browser, Patient Detail, and Supply browser open all at the same time. You can minimize one window to view others behind it, or you can use CTRL+TAB to move from one window to the next. Press and hold the CTRL key while repeatedly pressing the TAB key to move from window to window.

By clicking on the Window menu, you can view a list of open windows. Click on one of the window names to bring that window to the foreground.

If you need to bring up other applications (such as a word processor or spreadsheet) that are running on your computer behind the Control Center, you can use ALT+TAB to move from application to application.

Viewing Online Help

The Control Center includes context sensitive online help. This means that whenever you open help, the topic that appears contains specific instructions on the Control Center form or window you were using. *The online help is always the most current source of information about the Control Center. Every time the Control Center software is updated or upgraded, a new online help file is included. Therefore, the online help may contain information that is not in this User's Guide.*

To open help, you can click on the **Help** button on the Control Center toolbar. For more instructions on using Windows help, consult your Microsoft Windows documentation.

Logging In to the Control Center

To start the Control Center application, click on the **Start** button on the Windows Task Bar, select **Programs**, then select **MedSelect**, then select **Control Center**.

The Control Center is Username and PIN protected. You must log in using a valid Username and PIN provided by the system administrator. You also must have Control Center Login access rights to log in to the Control Center. All unsuccessful login attempts are recorded in the System Log Message report.

Logging in After a New System Installation

A newly installed Control Center includes a default administrative account that you can use until you have added a unique account for yourself. Once you have added your own user account, you should delete or disable the default administrator account as described under **Maintaining User Accounts** on page 40.

To login as the default administrator, see **Login and Preparation** on page 12.

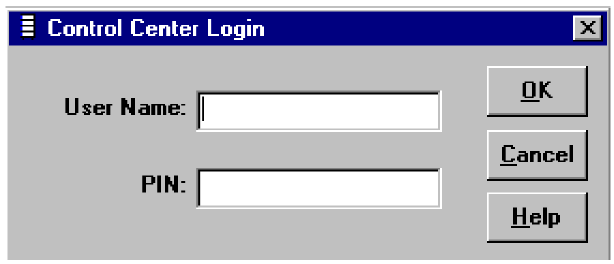
Changing Your PIN

You can change your own PIN number after you have logged in to the Control Center. You use this PIN whenever you log in to the Control Center or a Display Terminal.

To change your PIN

1. Under the **File** menu, select **Change PIN.** The Control Center PIN Change window opens.
2. In the **Current PIN** field, type your current PIN.
3. In the **New PIN** field, type the new number that you want to use as your PIN.
4. In the **Confirm PIN** field, type your new number again to verify that you did not mistype.
5. Click the **OK** button. Your new PIN will be effective the next time you log in.

Normal Login Procedure
Once you have started the Control Center, the login prompt appears, as shown below.



To enter your Username and PIN

1. Type your **User Name**.

2. Press the **TAB** key to move the cursor to the next line.

3. Type your **PIN**, then press **ENTER** (or click **OK**).

   If this is the first time that you have logged into any SupplySource application, then your PIN is **9999**. After you enter **9999**, you are prompted to change your PIN.

A successful login allows access to all Control Center menus. Once you have started a Control Center session, you cannot start another Control Center session until you close the current session. Multiple Control Center sessions cannot run on the same computer at the same time.

Control Center Menus

The Control Center menus organize the work that can be accomplished at the Control Center. In addition to standard Windows menus, there are two Control Center menus you use to perform routine system administration: Management, and Maintenance.

Management Menu
The Management menu includes those functions typically performed on a daily basis. Patient accounts, supply control, and file importing are all managed through this menu.

Maintenance Menu
The Maintenance menu includes those functions that are normally configured during the system setup, and that change little over time. User Accounts, Facility Setup, and System Configuration are all maintained through this menu.

Because the system must be set up before it can be used, the Maintenance menu is explained first.

Knowing What Kind of Information to Enter on a Control Center Form

Much of the information stored by SupplySource may be downloaded through a system interface, but all of it can be entered directly at the Control Center. Each Control Center form has unique fields. A listing of all **Data Entry Fields** that begins on page 103 explains these fields in detail, including any pre-loaded data, limited field lengths, and suggestions for entering useful information.

This information is also included in the Control Center online help. Every help topic that contains instructions for entering data also includes a topic that explains the data fields. If you open the fields topic, you can leave it open and consult it while you work in the Control Center application.

To reference fields information in the Control Center online help

Suppose you are working in the Supply Detail and need to know what kind of information to put in the data fields. Follow these steps:

1. Click the **Help** button.

   A context sensitive help topic opens. This topic lists options related to the Supply Detail.

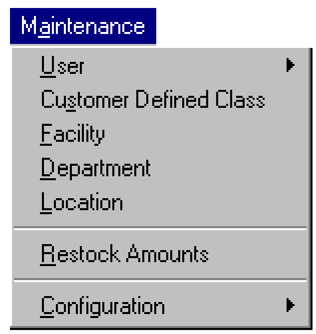
2. Click on the option for **Supply Detail Fields**.

   A second window called Supply Detail Fields opens.

3. Enter information in the Supply Detail while consulting the help window.

Using The Maintenance Menu

The Maintenance menu provides most of the functions you need to set up the system and control data that does not change frequently. User account maintenance, facility setup, and system configuration are all performed through this menu.



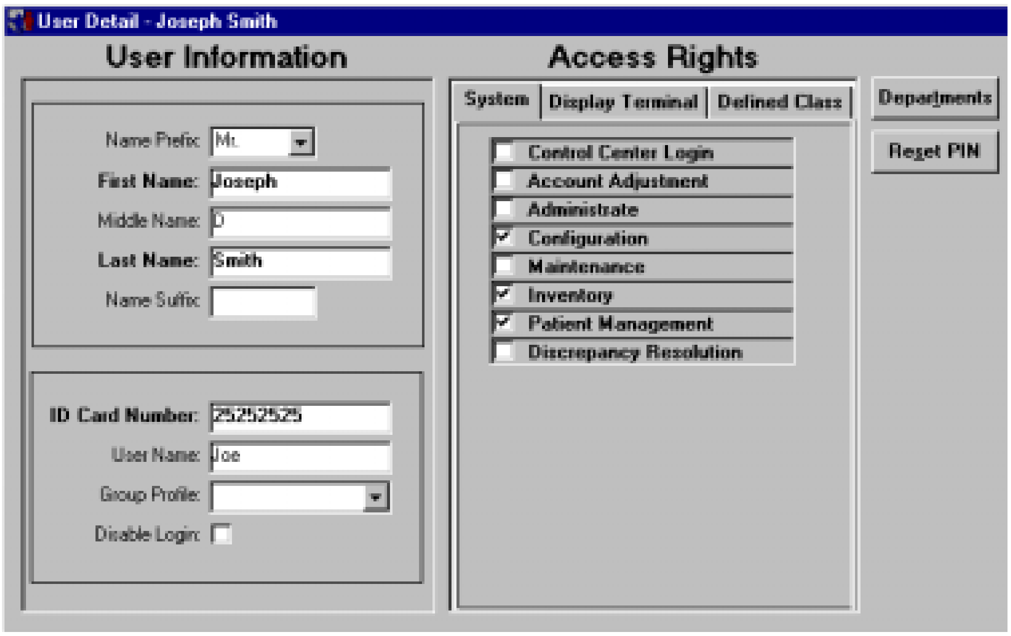
Maintaining User Accounts

User accounts, including access right assignments, are managed through User Maintenance. You create an account for every system user, and define access privileges depending on the user's authorization to dispense materials, enter or change system data, etc. You can also disable a user account temporarily, such as when a user is on vacation.

Users must be assigned to one or more departments within your facility. Users can only log in to Display Terminals that are in their assigned departments. You can also define an expiration date to limit the time when a user's account is valid for a specific department.

When you open User Maintenance, the User browser is displayed. You can view the details of any user listed in the browser, add a new user, delete a user, or print user information. If this is the first time that the system has been used, then the only user is the administrative account. Once you create a user account for yourself, you should delete the administrative account, remove its access rights, or change the Control Center Username or PIN so that an unauthorized person cannot use the account.

Information about users is recorded in the user detail. The user detail is divided into two columns: User Information and Access Rights.



Access rights can be assigned individually, or can be assigned as part of a *group profile*, which is a pre-defined group of access rights. Access rights that are grayed out are part of a group profile.

You must have Control Center Login and Administrate access rights to create and edit user accounts.

To view or edit the user detail

1. Under the **Maintenance** menu, select **User**, and then select **User Browser**.
2. From the User browser, click the line showing the account you want to view.
3. Click the **User Details** button to open the user detail.
4. Edit the data as necessary.
5. Click the **Save** button on the toolbar.

To reset a user's Personal Identification Number (PIN)

While viewing the user detail, click on the **Reset PIN** button. This causes the user's PIN number to be set to 9999. The next time that user tries to log in to the Control Center or the display terminal, the user must enter 9999 as the PIN. A prompt then forces the user to modify the 9999 PIN to some other number. For security, an administrator cannot enter the user's actual PIN number on the detail. All PIN resets will be recorded in the System Log Message report.

To add a new user account

1. While viewing either the user browser or user detail, click on the **Add** button on the toolbar.

   If you were viewing the user browser, then the user detail opens automatically.

2. Type data into each field on the **User Information** column.

   You can enter all information except for the PIN number. By default, the user's PIN is 9999.

3. Check off each access right you want to allow this user, or choose a profile from the **Group Profile** drop-down list.

   To clear an assigned group, select the **Group Profile** drop-down list, and then press the spacebar. Selecting access rights and group profiles are explained in further detail under **To select access rights** on page 44. To create group profiles, see **Creating and Deleting Group Profiles** on page 45.

To assign a user to one or more departments

1. While viewing the user detail, click on the **Departments** button.

   The User-Department Assignment window opens. The column on the left lists all available departments. The column on the right shows departments currently assigned to the user.
2. To assign only specific departments, select each department name from the column on the left, then click on the **>** button. The names you selected appear in the user's assigned list.
3. To assign all available departments to the user, click on the **>>** button.
4. To unassign specific departments, select each department from the column on the right, then click on the **<** button, or use the **<<** button to unassign all departments.

5. To set an expiration date for the account, select the department from the column on the right, then select **Change Expiration** from the **Data** menu, and enter the date of expiration (date is mm/dd/yyyy; time must be military time).

To delete a user account

Note: Instead of deleting an account, you may want to disable it. See **Disabling User Accounts** on page 44.

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1. Select the account from the User Browser list.

   You can delete any record that is not your own. If you must delete your own record, then you must first create a new record for yourself and log on with that new ID. You can then delete your old record.

2. You may choose to view the user detail, but you do not have to view the detail to delete the record.

3. Click the **Delete** button on the toolbar.

4. You are asked to confirm the deletion. Click the **Yes** button to confirm, or click on the **No** button to cancel the deletion.

   If you performed the deletion from the user browser, then the data is not removed from the database until you click on the **Save** button on the toolbar.

Note: To protect the integrity of the database, you may not be allowed to delete a user if the user information is being used by other Control Center forms or otherwise meets a condition that prevents the deletion. If such a condition exists, you are notified by a message window.

To select access rights

To assign access rights, you may want to choose a group profile. **To clear an assigned group, select the Group Profile drop-down list, and then press the spacebar**.

If you do not want a pre-defined group profile, you can customize a user's access rights by clearing the group profile, then clicking the check box next to each individual access right. A checkmark indicates that the access right is selected. Click the box again to unselect the access right.

Access rights are divided into three categories: **System Rights**, **Display Terminal** and **Defined Class** rights.

Each access right is defined under **User Detail Fields (Access Rights)** on page 122.

Disabling User Accounts
You can disable a user account temporarily when a user is off-site, then enable it when the user returns. Disabling the account prevents anyone from logging on to any SupplySource application with the disabled username and PIN.

The system also disables an account automatically if someone tries to repeatedly log in with a valid username but invalid PIN. The number of login tries allowed before an automatic disable is set in the Facility Maintenance window (see **Maintaining Facility Settings** on page 50).

To manually disable a user account

1. Open the user detail for the account you want to disable.
2. Select the **Disable Login** option.
3. Click the **Save** button on the toolbar.

   The user can no longer log in to SupplySource. To enable the account, turn off the **Disable Login** option.

Creating and Deleting Group Profiles

You can create group profiles that include specific access rights, instead of individually assigning rights to each user. You can give a group profile any description you wish, and it can include any access rights you want.

For instance, suppose that you want to assign all Registered Nurses one set of rights, and all Licensed Practical Nurses to have another set. You might create one group called RN, and another called LPN. To each of these profile groups, you would assign all of the rights you want the group to have. Then, you would assign each nurse to the appropriate group. If you later change the rights of the RN group, every user with RN profile group rights would be affected by the change.

Once you have assigned a group profile to a user, you can still add or delete *additional* individual access rights but you cannot modify rights that are part of the profile.

For more information on assigning users to profile groups, see **To select access rights** on page 44.

To view or edit group profiles

1. Under the **Maintenance** menu, select **User**, and then select **Group Profile**.
2. Click on the description of the group profile you want to view.
3. Select or unselect any access rights to modify the profile, as you want.
4. Click the **Save** button on the toolbar.

To create a group profile

1. Under the **Maintenance** menu, select **User**, and then select **Group Profile**.
2. Click the **Add** button on the toolbar.
3. Type a new group profile description.

   You can use single quotes in the description, but not double quotes.
4. Select each access right you want to associate with the profile.

Access rights are divided into three categories: System rights, Display Terminal rights, and Customer Defined Class rights (see page 47). Click on the **System**, **Display Terminal**, or **Defined Class** index tabs to view the associated rights.

5. Click the **Save** button on the toolbar.

To delete a group profile

1. On the Group Profile detail, select the profile you want to delete.
2. Click the **Delete** button on the toolbar.

   A confirmation box asks you to confirm the deletion. Click the **Yes** button to confirm.

Note: To protect the integrity of the database, you are not allowed to delete a group profile if the profile is assigned to any users. You must remove the assignment from all users before you can delete a group profile. If such a condition exists, you are notified by a message window.

Customer Defined Classes

Customer Defined Classes (CDCs) allow you to create your own classes of supplies. These classes can then be used to grant restocking and/or dispensing privileges to individual users or user groups.

You need the Administrate access right to create Customer Defined Classes.

To Create a Customer Defined Class:

1. Under the **Maintenance** menu, select **Customer Defined Class**. The Customer Defined Class window will open.
2. Click the **Insert** button on the toolbar.
3. Enter a description for your Customer Defined Class (maximum of 15 characters).
4. Click the **Save** button.
5. When a new CDC is saved, two corresponding access rights are created—one for restocking and one for dispensing. These access rights may then be assigned in the **User Detail** or the **Group Profile Maintenance** windows, **Access Rights** area, **Defined Class** index tab.

To Assign Supplies to a Customer Defined Class:

1. Under the **Maintenance** menu, select **Customer Defined Class**. The Customer Defined Class window will open.
2. Choose the CDC Description to which you would like to assign supplies.
3. Click the **Supplies** button.
   The CDC Assignment window will open. The supplies without a defined class will appear on the left, the supplies already assigned to this CDC will appear on the right.
4. Assign/unassign supplies to this CDC via drag and drop, or by using the arrow buttons.
5. Click the **Save** button.
6. A supply's CDC can be found in the Supply Assignment window (From the **Management** menu**,** choose **Supply Assignment**) or in the Supply Browser (**Management, Supply**).

To Assign Individual Supplies to a Customer Defined Class:

1. From the **Management** menu, choose **Supply**. Highlight the supply you'd like to assign a CDC and click the **Supply Details** button. Choose the CDC you want to assign this supply from the pull down list in the **Customer Defined Class** field. (See page 47.)
2. Click the **Save** button.

A supply's CDC can be found in the Supply Assignment window (From the **Management** menu**,** choose **Supply Assignment**) or in the Supply Browser (**Management, Supply**).

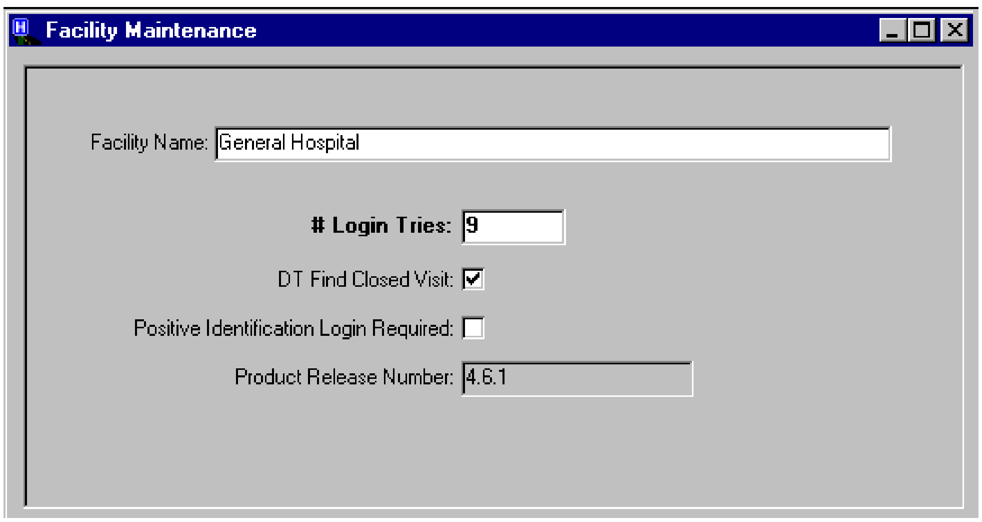
Facility Areas: Departments, Locations, and System-wide Attributes

Locations and departments are created and configured when SupplySource is installed. For a complete explanation of these terms, and instructions on configuring the system, see **Part One: System Configuration at Installation** on page 11. If you must add to or modify your existing system, consult Part One.

If you want to edit location or department information without changing the configuration, then use the following instructions.

Maintaining Facility Settings

Facility Maintenance is used to define global settings for SupplySource. The attributes you choose affect all devices in the system, regardless of department. To define specific department settings, see **Maintaining Department Settings** on page 52.



Facility Maintenance is used to define the following system attributes:

# Login Tries (required)	The number of times a user can unsuccessfully attempt to log in to a SupplySource software application before that user's account is disabled. An unsuccessful log in means that the user entered the correct login ID but an incorrect PIN.
DT Find Closed Visit	If checked, indicates that a patient find performed at a Display Terminal should search for closed as well as open visit records.
Positive Identification Login Required	If checked, indicates that all users in your facility must use a swipe card to log in to the Display Terminal. Logging on by manually entering a Login ID is not permitted. The user is required to enter a unique PIN number in addition to using the swipe card.

To view or edit facility data

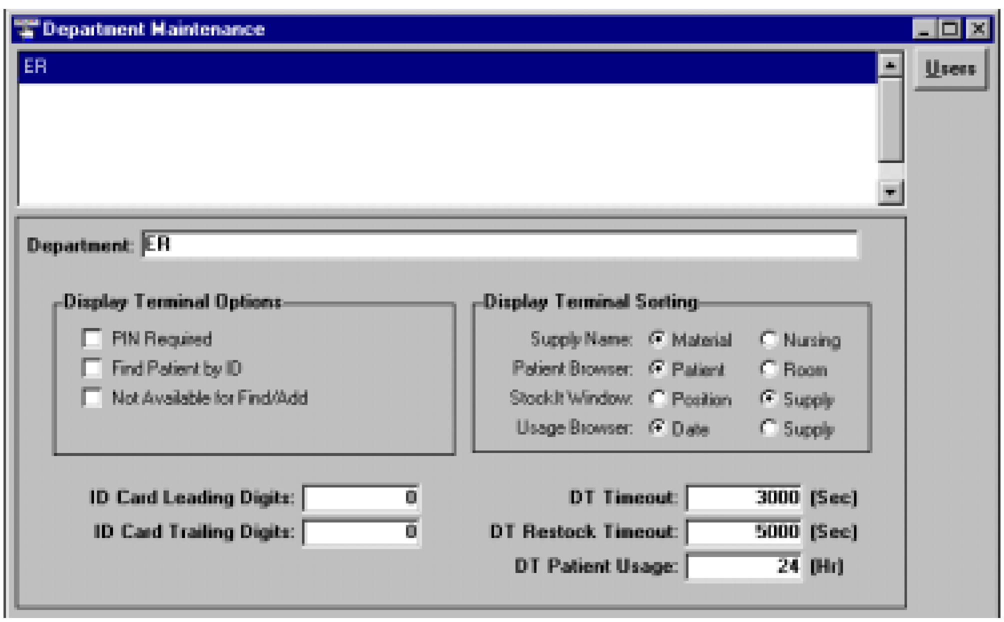
1. Under the **Maintenance** menu, select **Facility**.
2. Edit any data as necessary.
3. Click the **Save** button on the toolbar.

Maintaining Department Settings

Department Maintenance is used to create different departments within your facility, and then to define settings specific to the Display Terminals in each department. Each department may have unique settings.

In addition to department settings, there are global system settings that can be defined using Facility Maintenance. These are described on under **Maintaining Facility Settings** on page 50.

When you have created departments and defined their attributes, you can assign users to those departments. Users may only log in to Display Terminals that are in their assigned departments.



Department Maintenance is used to define the following attributes:

Department Options
These are options and attributes you can define at a department level:

Department (required)	A name you create to identify a department.
DT Timeout (required)	The length of time, in seconds, that a Display Terminal can be idle before automatically logging out the user.
DT Restock Timeout (required)	The length of time, in seconds, that a Display Terminal can be idle during a restock before automatically logging out the user. This is usually longer than the regular DT Timeout.
DT Patient Usage (required)	Indicates how many past hours’ worth of time the Display Terminal should use to show patient usage information. For instance, a value of 48 indicates that the Patient Usage window shows all patient usage for the past 2 days. The default is 72 hours.
ID Card Lead Digits and Trail Digits	These values determine how a user’s ID string is read from a swipe card. Lead digits indicate how many numeric characters should be ignored at the beginning of the string. Alpha characters are automatically ignored. For instance, if the lead string is A000, then Lead Digits should be set to 3 (because the "A" is ignored.). Trail digits indicates how many numeric characters to ignore at the end of the string but prior to the = sign. Every character after the = sign is ignored. All alpha characters in the trailing digits are also ignored. For instances, if the string ends with 0A00=0B and the Trail Digits is set to 3, then the 0A00 is ignored. The 0B is also ignored because it appears after the = sign.

Display Terminal Options
You can define these attributes for all Display Terminals within a department:

PIN Required	If checked, indicates that user must enter a PIN number to login to DT. This is not checked by default.
Find Patient by ID	If checked, indicates that when a user performs a patient find at a Display Terminal, the patient ID field is an option for specifying find data. Otherwise, the patient ID field is not an option for a patient find.
Not Available for Find/Add	If checked, indicates that patients in this department cannot be "found" by other departments when they do a patient search. The patient can still be found if searched for within its own department.

Display Terminal Sorting
These are default sorting options that can be set for every Display Terminal in a department:

Supply Name	Allows you to select the default display format for supplies listed on the Supply browser. You can choose to show supplies by their material name or nursing name.
Patient Browser	Allows you to select the default sort order for patient records listed on the Patient browser. You can choose to display records alphabetically in order by patient name or the room description.
StockIt Window	Allows you to select the default sort order for supplies listed on the StockIt window. You can choose to display supplies alphabetically in order by their position or the supply name.
Usage Browser	Allows you to select the default sort order for transactions listed in the Usage browser, which shows all supply transactions for a particular patient. You can choose to list the transactions in order chronologically by the date of the event, or alphabetically by the name of the supply involved.

To view or edit department data

1. Under the **Maintenance** menu, select **Department**.

2. Edit any data as necessary.

3. Click the **Save** button on the toolbar.

To assign (or unassign) a department to one or more users

1. While viewing the Department Maintenance window, select a department, and then click on the **Users** button.

   The Department-User Assignment window opens. The column on the left lists all user names. The column on the right shows users currently assigned to the department.

2. To assign only specific users, select each user name from the column on the left, then click on the > button. The names you selected appear in the department’s assigned list.

3. To assign all users to the department, click on the >> button.

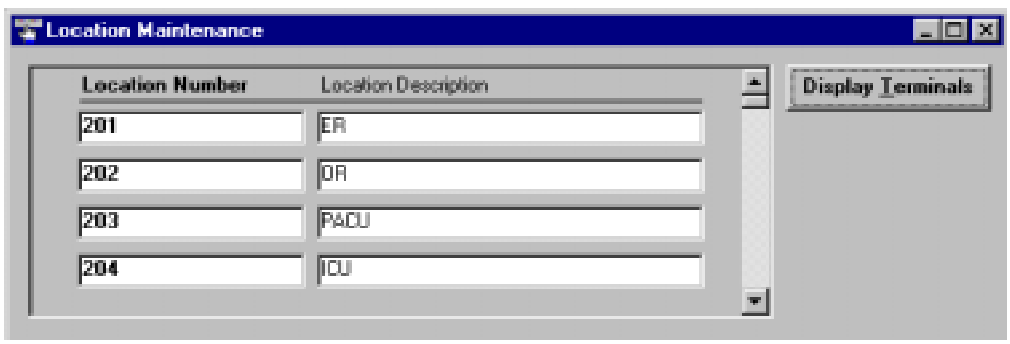
4. To unassign specific users, select each user name from the column on the right, then click on the < button, or use the << button to unassign all users.

5. To set an expiration date for the account, select the user name from the column on the right, then select **Change Expiration** from the **Data** menu, and enter the date of expiration (date is mm/dd/yyyy; time must be military time).

Maintaining Locations

All rooms in your facility are recognized by their *location* name. You can use Location Maintenance to enter all location names, such as patient rooms, operating rooms, hallways, and storage rooms. These names are used to identify the areas that contain all SupplySource devices, the inventory that is tracked by the system, and all patient care areas.

After you have added locations, you can assign them to Display Terminals (Configuration access rights are required to do this). When you assign a location to a Display Terminal, the Display Terminal only displays records for patients who are also assigned to that same location. However, a user at a Display Terminal can find a patient in any location by using the Display Terminal's Find/Add feature (see the *SupplySource Display Terminal Dispensing Guide*).



To view or edit locations

1. Under the **Maintenance** menu, select **Location**.

2. Edit any information as necessary.

3. Click the **Save** button on the toolbar.

To add locations

1. Click the **Add** button on the toolbar.

2. Enter the Location Number (required) and the Location Description (optional).

   The **Location Number** must be unique, and can include letters as well as numbers up to 15 characters. You cannot use double quotes in the location number.

   The **Location Description** is not shown on any reports or data screens. It is only provided on this window for additional information to help you identify a location. SupplySource uses the **Location Number** when referencing a location on any report or data window.

To add a range of sequential locations

1. Under the **Data** menu, select **Add Range**.

2. Type the name of the lowest room number in the **Beginning Location Number** field, and the highest room number in the **Ending Location Number** field.

   You can type any combination of numbers and letters. The automatic sequencing is based on the first string of *unrepeated* numbers found in your entry. For instance, if you enter Room50-1B as the beginning number and Room50-12B as the ending number, the system bases its sequencing on the numbers 1 through 12, ignoring everything to right and left of 1 and 12. After Room50-1B, the first location generated would be Room50-2B, followed by Room50-3B, and so on. If you started with a location of 200West and ended with 210West, the first location generated after 200West would be 201West, then 202West, and so on.

   The system can add leading zeros to make your start number and end number consistent. For instance, if your start number is Room001 and your end number is Room10, the system can change the end number to Room 010 so that the leading zeros are matched.

3. To cause the generation to skip every other number, check the **Skip Every Other Number** option.

   This allows you to generate only odd or even numbers, if necessary.

4. Specify how you want the locations to be described.

   You can select **Use This Description For All**, and then type a description, to give the same description to all of the new locations. If you select **Description Same As Number**, the description is identical to the number for each location.

5. Click the **OK** button when you are ready to generate the new locations.

   If your locations include leading zeros, then you are asked whether you want to use the zeros. If you respond **No**, then the zeros are dropped from the location number. For instance, Room01 becomes Room1.

To delete a location

1. Select the location.

2. Click the **Delete** button on the toolbar.

   You are asked to confirm the deletion. Click the **Yes** button to confirm, or click on the No button to cancel the deletion.

3. Click the **Save** button on the toolbar. Note that the data is not removed from the database until you save.

Note: To protect the integrity of the database, you may not be allowed to delete a location if the location information is being used by other Control Center forms or otherwise meets a condition that prevents the deletion. If such a condition exists, you are notified by a message window.

To assign (or unassign) a location to one or more Display Terminals

1. Select a location from the list, and then click on the **Display Terminals** button.

   The column on the left lists all system Display Terminals. The column on the right lists the Display Terminals that are assigned to the location.

2. To assign only specific Display Terminals, select each Display Terminal name from the column on the left, then click on the > button. The names you selected appear in the location's assigned list.

3. To assign all Display Terminals to the location, click on the >> button.

4. To unassign specific Display Terminals, select each Display Terminal name from the column on the right, then click on the < button, or use the << button to unassign all Display Terminals.

   Note that you cannot unassign a Display Terminal from a location that is the *default* location for the terminal. Every Display Terminal has one default location, but may have additional locations. The default location can only be modified in Display Terminal Configuration (see **Creating Display Terminals** on page 17).

Restock Amounts

The Restock Amounts window updates the database for Examiner Refill reports. If you have a daily automated task updating the database at a preset time, this function should only be used if you want to do an interim restock.

The **Restock** access right is required for this function.

To calculate Restock Amounts:

1. Under the **Maintenance** menu, choose **Restock Amounts**.
2. Choose the **Location** you would like to restock (the **Display Terminal** name(s) and **Department** name for that location are also listed).
3. Choose the **Report** type—**Below Min** or **All Positions**.
4. Click the **Calculate** button. Before it prints, a message box will remind you how many cabinets are at that location. Click **OK**. This will update the database.
5. Open Examiner and print the appropriate Refill Positions report. See **Generating Reports: Using Examiner** on page 92.

Using the Management Menu

The Management menu provides most of the functions you need to manage the daily flow of information. Patient accounts, supply assignment, and file importing are all managed through this menu.

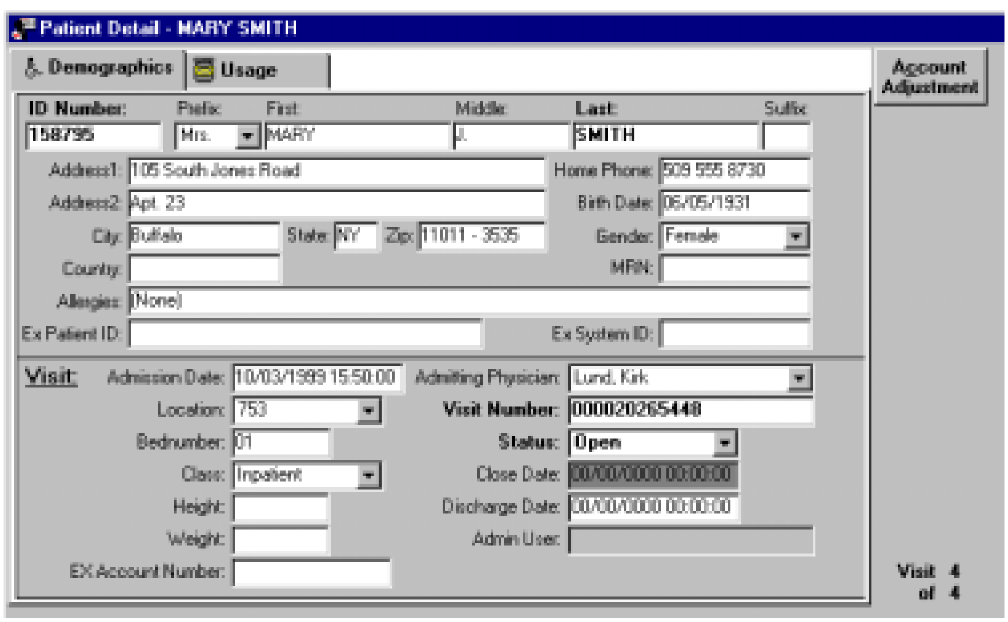
Managing Patient Records

Patient data is added, edited, and deleted by using Patient Management. When you open Patient Management, the patient browser is displayed. You can view the details of any patient listed in the browser, add a new patient, delete a patient, or print patient records.

The patient detail provides two different types of information about the patient: demographic information (which includes personal information and current visit information), and supply usage information.

The information under the **Demographics** tab is the only information you can add or edit. The information under the **Usage** tab cannot be edited. It is provided for reference only. When you view usage information, the data will pertain to the visit that is currently displayed.

The **Demographics** tab is divided into two parts: personal information is on the top, and current (open or on-hold) visit information is on the bottom.



In the database, the personal information record and visit records are separate records. Personal information about a patient generally changes infrequently. Personal information can be edited, for instance, if the patient's address changes. **You should never create more than one patient information record for the same patient.** Instead, the patient receives a new *visit* record for each new visit to the facility.

The total number of visits for this patient is shown in the lower right hand corner of the window. A patient can have an unlimited number of visits, but only one visit can have an open or on-hold status. The other visits must have a closed status. An open visit means that the Visit Status field reads **Open**. When a patient has an open visit, that patient is displayed for selection at a Display Terminal in the location that matches the visit's assigned location (on-hold visits are **not** available at the Display Terminal). Therefore, only patients with open visits can receive charges for dispensed items. Closing a visit causes the patient to be removed from the Display Terminal.

You must have Control Center Login and Patient Management access rights to add, edit, or delete patient and visit records.

To view or edit the patient detail

1. Under the **Management** menu, select **Patient**.

   The patient browser opens. The patient browser lists only patients with an open or on-hold visit record. The browser can be updated at any time to show new records that may be coming in to the database through a system interface. To ensure that the data in the patient browser is current, open the **Data** menu, then choose the **Refresh Browser** option. If you do not see the patient record you want, then that patient may not have any open or on-hold visits (see **Retrieving a Patient with No Open or On-hold Visits** on page 67).

2. From the patient browser, click on the line showing the record you want to view.

3. Click the **Patient Details** button (or double-click on the line showing the patient) to open the patient detail. The current visit for that patient is displayed.

   The current visit number for each patient is displayed in the bottom right-hand corner of the window. To view the patient's previous visits, from the **Data** menu, select **Previous Visit**. You may update the information in previous visits.

   Please note: as you scroll through a patient's visit records, the **Usage** tab will pertain to the currently displayed visit.

4. Edit the data as necessary.

5. Click the **Save** button on the toolbar.

To add a new patient and visit record

1. Click the **Add Patient** button on the toolbar.
2. Type data in each field on the form.
3. Click the **Save** button on the toolbar.

To delete a patient record

1. Select the patient name from the browser list.

   You are not permitted to delete a patient record if there is an open visit for that patient. To close a visit without viewing the patient detail, from the **Data** menu, choose **Close Visit**. You can also view the patient detail and change the visit status to closed.

2. Click the **Delete Patient** button on the toolbar.
3. You are asked to confirm the deletion. Click the **Yes** button to confirm, or click on the **No** button to cancel the deletion.

   If you performed the deletion from the patient browser, then the data is not removed from the database until you click on the **Save** button on the toolbar.

   If you were viewing the patient detail, you are returned to the patient browser automatically.

   Deleting a patient record causes all associated visits to be deleted.

Note: To protect the integrity of the database, you are not allowed to delete a patient if the patient record has had supply transactions (events). If such a condition exists, you are notified by a message window.

Closing Old Visits and Creating Additional Visits for Existing Patients
Each patient record can have many associated visit records. Never create more than one patient record for the same patient. Always create a new visit record for each new hospital visit.

A patient cannot have more than one open visit. To close a visit, from the **Data** menu, choose **Close Visit**, or view the patient's detail and change the **Status** on the visit record to **Closed**. Only open visits are displayed at Display Terminals.

To add a new visit

1. Select the patient name from the browser list, and then click on the **Patient Detail** button to display the patient detail.

   If the patient already has an existing visit, you must close it before adding a new one.

2. Click the **Add Visit** button on the toolbar. A new visit opens.

3. Enter the visit data.

   The visit number must be unique.

4. Click the **Save** button on the toolbar.

To delete a visit

1. Select the patient name from the browser list, and then click on **Patient Detail** to display the patient detail.

2. If the visit you want to delete is open, you must close it before deleting.

3. Click the **Delete Visit** button on the toolbar.

   You are asked to confirm the deletion. Click the **Yes** button to confirm, or click on the **No** button to cancel the deletion.

4. Click the **Save** button on the toolbar.

To scroll through multiple visit records

When a patient has multiple visit records, you can move to the next visit by pressing **CTRL+N**, or to the previous visit by pressing **CTRL+R**. You can also choose from the **Data** menu **Previous Visit** or **Next Visit**.

Retrieving a Patient with No Open or On-hold Visits
If all of a patient's visits have been closed, than that patient is no longer listed on the Control Center patient browser. However, you can still retrieve the Patient's record if you wish, then re-open a visit or add a new visit.

To retrieve the patient record

1. While viewing the patient browser, open the **Data** menu, and then select **Locate Patient Without Open Visit**.

2. In the Locate window, choose the search criteria from the drop-down list in the **Search** column.

   You can search by Admission Date, Patient ID Number, or Patient Last Name.

3. Choose an operator (**=** or **begins with**), then type the value you want to search for in the Value field (the search is not case sensitive when using the last name).

4. Click the **Search** button.

   All records matching your criteria are displayed in the results window. If no records are found, you can click on the **Reset** button to clear the criteria and try again.

5. Select the record or records you want from the results window, then click on the **Select** button. You can also double-click on a record or records to select them.

   The patient record is displayed in the patient browser.

Once the record has been retrieved, you can view the record and re-open a visit or add a new visit. Otherwise, all visits remain closed, and the next time you open the Patient browser, this record is not displayed. If a patient has no open or on-hold visits, then that patient record will not continue to be displayed on the patient browser after the browser is closed.

Assigning Unknown Supply Transactions to a Specific Patient

When a supply transaction cannot be attributed to a patient, it is given a status of "Unknown". You can use Inventory Adjustment to assign an unknown transaction to the correct patient. When the unknown transaction is transferred, the "Unknown" description is removed.

To assign an unknown transaction to the correct patient

1. Under the **Management** menu, select **Inventory Adjustment**.

   The Inventory Adjustment window displays two browsers. The top browser shows unknown supply transactions, with the most recent at the top of the list. The bottom browser is a list of patients.

2. In the top browser, select the unknown supply transaction you want to transfer.

3. In the bottom browser, select the patient who actually received the supply, then click on the **Retrieve Inventory** button.

   The patient's name is shown in the display box above the browser, and the usage record is displayed where the browser used to be.

4. Click the **Move** button.

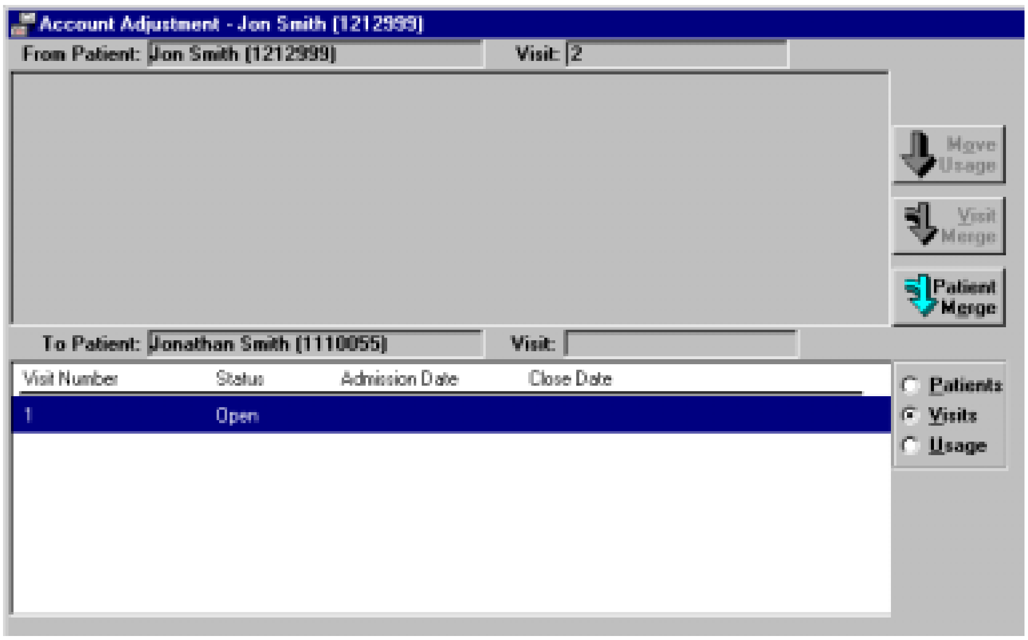
   You can also drag and drop the unknown supply transaction into the patient's usage record.

   If the transaction you want to move is a Return event, then the patient must already have a Taken event for that same supply (otherwise, you would be indicating a return for a supply that was never dispensed for the patient). When you move a Return event, a window opens for you to select the Taken event that should be associated with it. Choose the appropriate Taken event then click on the **Select Event** button.

5. To select another patient and repeat this process, click on the **Select Patient** button.

Adjusting and Merging Patient Records

You can use Account Adjustment to transfer dispensing transactions from one patient to another, or to completely merge two patient records. You must have Account Adjustment rights to perform account adjustments.



Transferring Supplies from One Patient to Another (Move Usage)
When a supply is taken or dispensed, it is attributed to the patient that was selected at the Display Terminal. You can use the Account Adjustment window to transfer supply events from one patient to another, in the instance that a supply was attributed to the wrong patient.

The following rules apply when you move usage:

- You can only transfer events with a status of Taken or Taken Transfer In.
- If a supply was taken and then returned, and you transfer the Taken event to another account, the corresponding Return event is transferred also.
- If you transfer a Taken event that has a corresponding Resolved Transfer In or Resolved Transfer Out event, the Resolved event is <u>not</u> transferred, but the quantity of the Taken Transfer In event is updated to reflect the adjustment.

Event statuses are defined under **Identifying Adjusted Events** on page 73.

To move supply usage:

1. Under the **Management** menu, select **Patient**.
2. Select the patient account that contains the supplies you want to move.
3. Click the **Patient Details** button.
4. Click the **Account Adjustment** button.
5. In the bottom browser, choose the patient then visit number you want to move the supply to.
6. Choose the supply you want to move in the top browser, then click the **Move Usage** button. You can also drag and drop supplies from the top to the bottom browser. The supply will be removed from the account of Patient "A" (top browser) and moved to the account of Patient "B" (bottom browser).

Merging Visit Records for the Same Patient (Visit Merge)

In the event that a patient has two visit records, one closed and one open, you can use Account Adjustment to merge the two visits. This might occur if a patient is admitted in the emergency room, and his record is closed. Then, a new record is opened when he is admitted to a room. These two visits should really be one continuous open visit.

If you intend to merge Visit "A" into Visit "B", note that all supply transactions from Visit "A" will become the property of Visit "B". ALL INFORMATION ABOUT VISIT "A" WILL THEN BE DELETED.

To merge visit records:

1. Under the **Management** menu, select **Patient**.

2. Select the patient account that contains the visit you want to merge into the desired or another visit (from the same patient).

3. Click the **Patient Details** button.

4. Click the **Account Adjustment** button.

   The Account Adjustment window displays two browsers. The top browser shows, in reverse chronological order, any supplies used by the selected patient for that visit. This is the sending account. The bottom form shows a patient browser. The visit you select will be the receiving visit.

5. In the bottom browser, choose the same patient account that was selected above and then select the visit number you want to merge the top browser information (visit) with.

6. Click the **Visit Merge** button. The visit shown in the top browser will be merged into the visit shown in the bottom browser. The visit shown in the top browser will then be deleted.

Merging Two Patient Records (Patient Merge)

In the event that two records exist for the same patient, you can use Account Adjustment to merge them into a single record. This might occur if a patient is entered at the Display Terminal without a patient ID, or if one of the records contained erroneous information (such as an incorrect ID) that prevented the Control Center or system interface from recognizing a duplicate record. In some cases, the interface with a hospital information system may allow a patient to have more than one patient record.

If you intend to merge a record for Patient "A" into the record for Patient "B", note that all supply transactions from Patient "A" become the property of Patient "B", including all open and closed visit records. ALL INFORMATION ABOUT PATIENT "A" IS THEN DELETED.

To merge a patient account

1. Under the **Management** menu, select **Patient**.

2. Select the patient account you want to merge into another patient account.

3. Click the **Patient Details** button. The current visit for that patient will appear on the screen (the visit number is noted in the lower right corner).

4. Click the **Account Adjustment** button.

   The Account Adjustment window displays two browsers. The top browser shows, in reverse chronological order, any supplies used by the selected patient for that visit. This is the sending account. The bottom form shows a patient browser. The patient you select there will be the receiving account.

5. In the bottom browser, visits for the patient whose account needs to be merged into will be displayed.

6. Click the **Patient Merge** button. The patient shown in the top browser will be merged into the patient shown in the bottom browser. The patient shown in the top browser will then be deleted. All other visits (if any) for the top patient will be moved to the receiving patient (the bottom browser).

Identifying Adjusted Events

When an event is transferred from one account to another, its status description changes, and the date of the event is set to today's date. The new description indicates that the event was transferred manually. In addition, the sending account will receive a new event, called a Transfer Out event, that is used to credit the account for each event originally attributed to it.

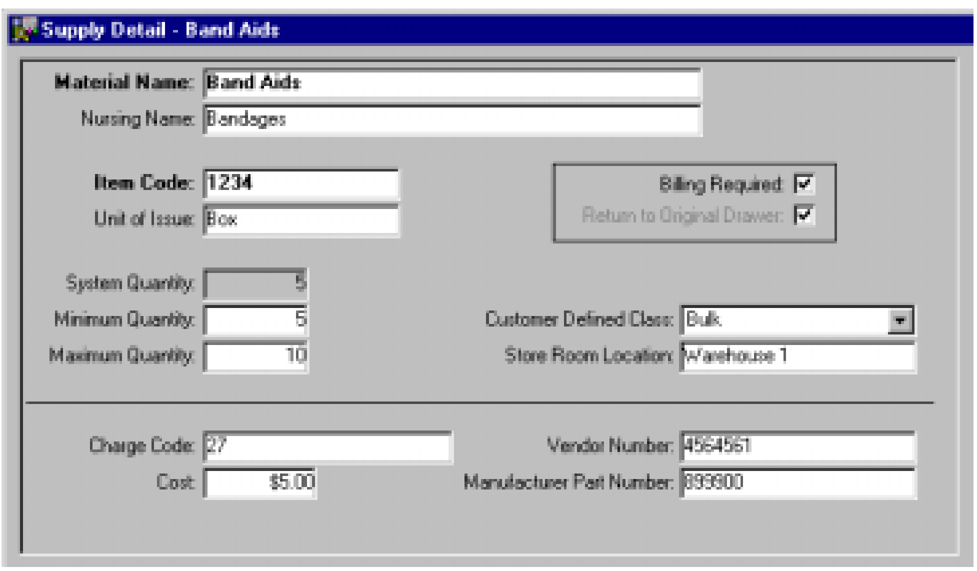
To save space at the Display Terminal, the abbreviation xfer is used for Transfer.

Event Name on the Account *Sending* the Event, Before Adjustment	**Event Name on the Account *Sending* the Event, After Adjustment**	**New Event on the Account *Receiving* the Event, After Adjustment**
Taken	**Taken Xfer Out**	**Taken Xfer In**
Returned	**Returned Xfer Out**	**Returned Xfer In**
Taken Xfer In	**Taken Xfer Out**	**Taken Xfer In**
Resolved Credit **Resolved Charge** **Taken (canceled)**	***Cannot be Transferred***	

Managing Supplies

Supply data is added, edited, and deleted by using Supply Management. When you open Supply Management, the supply browser is displayed. You can view the details of any record listed in the browser, add a new record, delete a record, or print records.

In the supply browser, supply data that is accented by bold type indicates that the supply has fallen below the minimum *system-wide* quantity. You can view supply quantities and other data on the supply detail. To ensure that the data in the supply browser is current, open the **Data** menu, then select the **Refresh Browser** option.



You must have Control Center and Inventory access rights to use Supply Management.

To view or edit the supply detail

1. Under the **Management** menu, select **Supply**.
2. From the supply browser, click on the line showing the record you want to view.
3. Click the **Supply Details** button to open the supply detail (or double-click on the line showing the supply you want to view).
4. Edit the data as necessary.
5. Click the **Save** button on the toolbar.

To add a new supply

1. Click the **Add** button on the toolbar. A blank Supply form opens.
2. Enter the Supply Data. Data fields are defined under **Data Entry Fields** on page 103 and in the online help.

To delete a supply

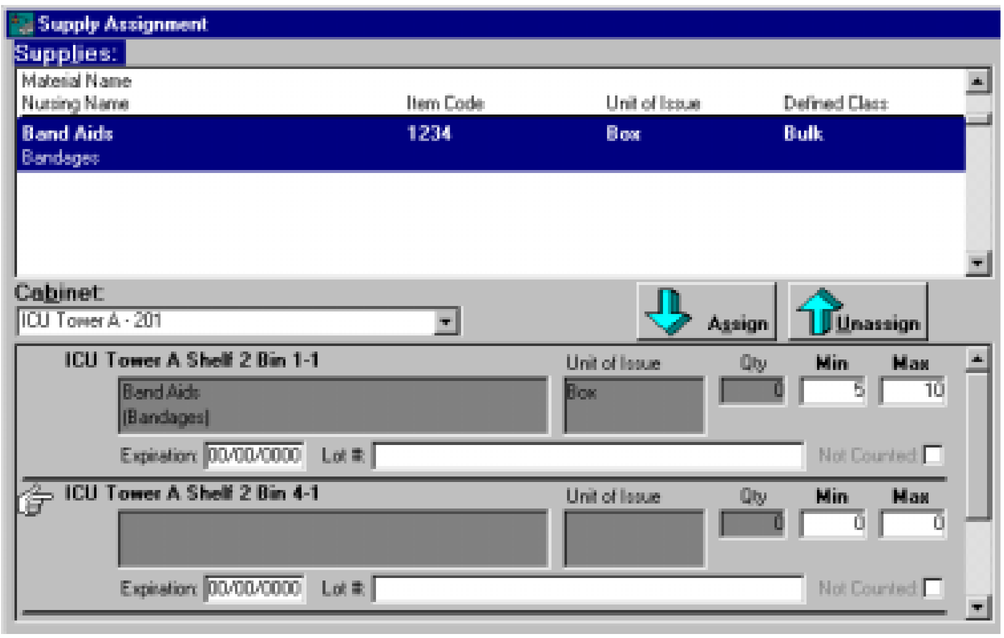
1. Select the supply name from the browser list.
2. You may choose to view the supply detail, but you do not have to view the detail to delete the record.
3. Click the **Delete** button on the toolbar.
4. You are asked to confirm the deletion. Click the **Yes** button to confirm, or click on the **No** button to cancel the deletion.

   If you performed the deletion from the supply browser, then the data is not removed from the database until you click on the **Save** button on the toolbar.

Note: To protect the integrity of the database, you may not be allowed to delete a supply if the supply information is being used by other Control Center forms or otherwise meets a condition that prevents the deletion. If such a condition exists, you are notified by a message window.

Assigning Supplies to SupplySource

Supplies are assigned to SupplySource positions by using Supply Assignment. When a supply is assigned to a position, you may set maximum and minimum quantities for the position. All other information about a supply is entered using Supply Management.



You must have Control Center and inventory rights to assign supplies to SupplySource positions.

The Importance of Setting Maximum and Minimum Quantities

The maximum quantity is the highest quantity of the supply that should be stocked at the position. For supplies that are used frequently, you may want to set the maximum quantity as high as the position's holding capacity. For supplies that are used infrequently, you may want to set the maximum quantity at less than the actual holding capacity, to prevent over-stocking of the supply.

The minimum quantity is the lowest quantity of the supply that should be stocked at that position. Minimum quantities help you ensure that adequate supplies are kept in stock.

If the same supply is stored in multiple positions, then the minimum quantity for each position should be set to 1. If the minimum quantity is set higher than 1, then a position that falls below minimum is likely to be restocked before the inventory can roll over to the next available position containing the same supply. This causes the inventory in the second position to grow old and possibly expire before it can be used.

If the minimum is set to 0, then supply position will never be listed on a below minimum report, because the inventory cannot fall below 0. This may cause a position to remain empty for some time.

To assign a supply to a position

1. Under the **Management** menu, select **Supply Assignment**.

   Supply Assignment contains two browsers. The top is a supply browser. The bottom is a cabinet browser that shows all of the supplies contained within the selected cabinet.

2. In the drop-down **Cabinet** field, select a cabinet.

3. Click on a specific position in the cabinet.

   You may have to scroll through the list of positions to locate the position you want. A pointing hand (☞) indicates the currently selected position.

4. In the supply browser, select the supply you want to assign to the position.

5. Click the **Assign** button.

   You can also drag and drop the supply into the cabinet browser.

6. In the **Min** field, enter the minimum quantity of the supply that should be kept at this position. In the **Max** field, enter the maximum quantity of the supply that should be kept at this position. These fields are required.

   The **Qty** field, which shows the actual quantity currently stocked, cannot be edited from this form. Actual quantities can only be entered at the Display Terminal.

7. If you are tracking supply expirations, then enter the expiration date and manufacturer's lot number of the supply with the earliest expiration date.

   Normally, this information is entered at the Display Terminal when the supply is stocked. If you are not tracking the expiration, then the **Expiration Date** field should display 00/00/0000 and the **Lot #** field should be blank. To reset an existing expiration date, double-click on the date so that it becomes highlighted, then press the spacebar.

To edit a position's contents

1. In the drop-down **Cabinet** field, select the cabinet that contains positions you want to edit.

2. Click on the position you want to edit.

3. To change the maximum or minimum quantities, click into either field, and then enter the new quantity.

4. To remove or unassign the supply, check that its actual quantity is 0 (zero), then click on the **Unassign** button.

   If the position still contains supplies, then those supplies must be accounted for before you can unassign the supply. Therefore, the system automatically attempts to unload any supplies still in the position (you must physically remove the supplies yourself). You are asked if you want to unload these supplies before continuing. If you do not, then the supply cannot be unassigned.

To check the details of a supply in the browser list or cabinet positions

1. Right-click on the name of a supply listed in the browser or displayed in the cabinet position. An options list opens. You can also open the options list by pressing the **Enter** key while the cursor is in the supply list browser box.

2. Click the **Details** option.

   A supply detail opens and displays information about the supply. These details are for information only. You cannot edit the supply detail from this window. To close the Supply detail and return to Supply Assignment, click on the **Close** button on the toolbar.

To use the keyboard to move between the supply browser (top of form) and supply position list (bottom of form)

1. When the cursor or selected field is in the supply browser (top of form), press **CTRL+B** to move into the supply position list (bottom of form).

2. When the cursor or selected field is in the supply position list (bottom of form), press **CTRL+S** to move into the supply browser (top of form).

Discrepancy Resolution

Discrepancies can be created at the DT in two ways:

1. **A discrepancy may be created automatically when dispensing supplies.** When taking (dispensing) supplies, if the user "takes" more than the system thinks is available and enters that number on the button bar, a discrepancy is automatically created. The user is asked to verify the number entered at the button bar before the discrepancy is recorded (to avoid creating discrepancies due to typographical errors). The event that is generated when the discrepancy is recorded can be viewed on the Control Center Discrepancy Resolution form. An administrator should correct the count at the DT after the discrepancy is resolved.

2. **A discrepancy may be reported during supply restocking.** If a restocker discovers a difference between the system count and the physical count of a supply, the restocker should press the **Discrepancy** button at the DT while viewing the discrepant position's Stock Amount window (if in **Restock** mode) or StockIt window (if in **StockIt** mode). The user is then prompted to enter the actual quantity in the position prior to restocking it, and a new Resolved event is generated based on the user's correction. *The position quantity is updated to match the user's count, and the system count is updated accordingly*.

To view, print out, and resolve these discrepancies, see **Viewing and Resolving Discrepancies** (below).

Viewing and Resolving Discrepancies

You can view and resolve discrepancies on the Discrepancy Resolution window. This window lists all discrepancies that have occurred during a time period that you define. It also shows detailed data related to the discrepant event.

Unresolved discrepancies are also listed on the Discrepancy report (see **Using the Discrepancy Report** on page 84). Once an event has been marked as resolved at the Control Center, it is no longer displayed on the Discrepancy report, but it may still be printed from the Discrepancy Resolution window.

You can use this window to limit the information displayed and printed to make it more manageable. There are two types of information you can limit:

Date Range: When you first open the Discrepancy Resolution window, you are prompted to set a date range. The number of days you specify determines how far back in time the browser goes to retrieve and display discrepant events.

Previous Accesses: For each individual discrepancy listed in the browser, you may view a list of users who accessed the position prior to the discrepancy. You can limit the number of previous accesses shown for each discrepancy.

To view and comment on discrepant events

1. Under the **Management** menu, select **Discrepancy Resolution**.

   The top form is an event browser that lists discrepant counts that have been reported at the Display Terminal. Note that the **Resolved** column indicates whether or not the event has been resolved. The bottom form is a discrepant event detail that shows information about the discrepancy.

2. Click on a discrepant event.

   The specifics of the event are shown in the detail.

3. Edit or add the resolution description as necessary.

   You can enter any text you like into the description. You may want to explain why there was a discrepancy, or other similar information. When you save the record, *your name is appended as a signature to this description*.

4. Check off the **Resolved** box to indicate that this discrepant event has been reviewed and has been resolved.

   When this box is checked off, the discrepant event no longer appears on the Discrepancy report. The event continues to be shown on the Discrepancy Resolution window on the Control Center; it is not purged.

To set the date range for the discrepancies you are viewing

1. While viewing the Discrepancy Resolution window, from the **Data** menu, select **Set Date Range**.

2. Enter the beginning and end dates to define the range you want to view.

   If you check the **Always Display Before Retrieving** option, you are prompted to set the date range every time you open the Discrepancy Resolution window in the future.

3. If you select the **Defaults** button, the dates are set automatically so that the begin date is determined by the Report Criteria setting in the Application Properties dialog (**Maintenance**, **Configuration**, **Client**, **Properties** button). The end date is today's date.

To view previous accesses to a discrepant position

1. Select a discrepant event in the browser.

2. Click the **Show Previous Access** button.

   You can also double-click on the discrepancy, or select from the **Data** menu **Show Previous Accesses**.

   A new window opens, displaying a record of previous users who dispensed supplies from the position that now has a discrepancy.

3. Click the **Print** button if you want to print this list.

4. Click the **Close** button to close the window.

To set the number of previous accesses to a discrepant position

1. From the **Data** menu, select **Set Number of Previous Accesses**.

2. In the Set Previous Accesses window, enter the number of accesses you want to view.

3. Enter the number of days to limit the search for previous accesses.

   When searching for previous accesses, the system stops searching when it has found the number of accesses specified in Step 2, or the number of days specified here, whichever comes first. For instance, suppose you enter 5 as the number of previous accesses, and 10 as the number of days. If a position has only been accessed 3 times in the past 10 days, then the system stops searching for previous accesses beyond the 10-day limit. In this case, only 3 accesses are shown.

4. Click on **OK** to close the Set Previous Accesses window.

The previous access setting is remembered by the system. You do not need to set this each time you want to view previous accesses, unless you want to change the number.

Using the Discrepancy Report

The Discrepancy report is designed to show an audit trail of discrepancies and previous accesses that occur for each supply position. This report provides the list of users who have most recently accessed a supply position that was found to be discrepant. *Whenever there is a discrepancy in your system, use this report to contact each user to determine whether they can offer information that helps to resolve the discrepancy*.

How to Read the Discrepancy Report

The Discrepancy report lists each outstanding discrepancy, and for each, it shows a list of individuals who previously accessed the cabinet. The number of days of previous accesses shown can be set when you print the report.

If a discrepancy occurs on a shelf that has more than one compartment, then the list of previous accesses includes *all* accesses to that shelf, not just the compartment that has the discrepancy. In other words, you see a list of several accesses to the shelf, but each access may or may not be for a different supply in a different compartment.

Printing the Discrepancy Report and Other Discrepancy Information

To print information about discrepancies, you must be viewing the Discrepancy Resolution window.

To print the Discrepancy Report

Before printing the Discrepancy report, make certain the printer is set to print in landscape mode. To print the Discrepancy report, click on the **Print Discrepancy Report** button.

To print more specific types of information

To print other information about discrepancies, select the **Print** option under the **File** menu. You receive four print options. Choose the option you want, then click on the **OK** button. The following four choices are available:

1. List of Discrepancies	This option prints a list of all of the discrepancies in the system.
2. Current Discrepancy Detail	This option prints the detail that is currently displayed on the Discrepancy Resolution window.
3. Previous Accesses of Current Discrepancy	This option prints information about the previous accesses to the discrepant position that is currently highlighted in the browser. The number of accesses shown depends on the number you have specified in the **Set Number of Previous Access** option under the **Data** menu.
4. Previous Accesses of all Unresolved Discrepancies (Discrepancy Report)	This is the same as the Discrepancy Report. This option prints information about the previous accesses to ALL of the unresolved discrepant positions that are listed on the Discrepancy Resolution window. The number of accesses shown depends on the number you have specified in the **Set Number of Previous Access** option under the **Data** menu. This printout may take a long time if you have many discrepancies. If there are more than 20 or 30 discrepancies, you may want to print only previous accesses for the current discrepancy, not all discrepancies, as described in option 3 above.

Importing Supplies

To reduce or eliminate the need for manual supply entry, data from an on-line supply list can be imported into the SupplySource database. The list must meet the following requirements before it can be imported:

- It must exist in a flat file (text) format.
- The flat file must be tab delimited, dBase II, or dBase III format.
- The flat file must have, at minimum, the fields marked required in the table below. Other fields are optional, and all fields must not exceed the length specified in the table.

In addition to these requirements, the following rules will be applied to an imported list:

1. The item code must be unique. Existing records will be updated with new information. New records will be added to the database.
2. If no Nursing Name exists, then Nursing Name = Material Name
3. If selected for import but value is not valid, then Billing Required defaults to Y

Field Name	Type	Length
Supply Material Name (required)	Char	50
Supply Nursing Name	Char	50
Unit of Issue	Char	20
Manufacturer Part Number	Char	15
Item Code (required)	Char	15
Supply Charge Code	Char	25
Supply Max Quantity	Number	
Supply Min Quantity	Number	
Supply Cost	Money	8.2
Count Remaining Flag	Char	1
Store Room Location	Char	25
Vendor Number	Char	15
Billing Required	Char	1
Customer Defined Class	Char	1

To import a supply list:

1. Under the **Management** menu, select **Supply Import**.

   Supply Import lists all fields that could be a part of your supply list.

2. Turn off any fields that are not part of your list by removing the check in the **Included** checkbox.

   Some required fields can be unselected. However, if you unselect a required field, no new records will be added. Instead, only existing records will be updated. Some required fields cannot be unselected. You will be informed if you attempt to unselect one of these fields.

3. Arrange the order of the fields to match the order of your list.

   To move a field up or down in the list, select the field, then click on the **Move Up** or **Move Down** button, or drag and drop the field to a new location in the list.

4. If you want to overwrite any fields in existing records with the imported values, then check the **Overwrite** option for that field name. If you do not select the Overwrite option, then values in existing records will not be changed.

   You can save the format that you have defined so that you do not have to configure the fields again. Under the **Data** menu, select **Save Column Format**.

5. Next to the **Import File** field, click on the **Browse** button to locate the file.
6. If necessary, select the **Skip File Header** option to ignore any header information in the file.
7. Click the **Import** button.

When you close the window, you may be asked if you want to save the format for the import options (only if you have moved fields up or down). Choose **Yes** to preserve this format on this Control Center computer only. If you choose **No**, the list will open in its default format the next time you use this import function.

Importing Locations

Location data can be imported into the SupplySource database. Location data must meet the following requirements before it can be imported:

- The data must exist in a flat file (text) format.
- The flat file must be tab delimited, dBase II, or dBase III format.
- The flat file must have the format defined in the following table (all fields are optional unless otherwise noted):

Field Name	Type	Length
Location Number (required)	Char	15
Location Description	Char	30

The following rule is applied to an imported location: if no Location Description exists, then Location Description = Location Number.

To import location data

1. Under the **Management** menu, select **Location Import**.

   Location Import lists all fields that contain location-specific data.

2. Turn off any fields that are not part of your data by removing the check in the **Included** checkbox.

   Some required fields can be unselected. However, if you unselect a required field, **no new records will be added.** Instead, only existing records will be updated. Some required fields cannot be unselected. You will be informed if you attempt to unselect one of these fields.

3. Arrange the order of the fields to match the order of your data.

   To move a field up or down in the list, select the field, then click on the **Move Up** or **Move Down** button.

4. If you want to overwrite any fields in existing records with the imported values, then check the **Overwrite** option for that field name. If you do not select the **Overwrite** option, then values in existing records will not be changed.

You can save the format that you have defined so that you do not have to configure the fields again. Under the **Data** menu, select **Save Column Format**.

5. Next to the **Import File** field, click on the **Browse** button to locate the file.

6. If necessary, select the **Skip File Header** option to ignore any header information in the file.

7. Click the **Import** button.

When you close the window, you may be asked if you want to save the format for the import options (only if you have moved fields up or down). Choose **Yes** to preserve this format on this Control Center computer only. If you choose **No**, the list opens in its default format the next time you use this import function.

Importing Users

User data can be imported into the SupplySource database. User data must meet the following requirements before it can be imported:

- The data must exist in a flat file (text) format.
- The flat file must be tab delimited, dBase II, or dBase III format.
- The flat file must have the format defined in the following table (all fields are optional unless otherwise noted):

Field Name	Type	Length
User Card Number (required)	Numerals only	15
User Name Prefix	Char	4
User First Name (required)	Char	15
User Middle Name	Char	15
User Last Name (required)	Char	15
User Name Suffix	Char	8

All imported user accounts are assigned a PIN of 9999 that must be changed at any Display Terminal or Control Center when that user logs in.

To import user data

1. Under the **Management** menu, select **User Import**.

   User Import lists all fields that contain user-specific data.

2. Turn off any fields that are not part of your data by removing the check in the **Included** checkbox.

   Some required fields can be unselected. However, if you unselect a required field, **no new records will be added.** Instead, only existing records will be updated. Some required fields cannot be unselected. You will be informed if you attempt to unselect one of these fields.

3. Arrange the order of the fields to match the order of your data.

   To move a field up or down in the list, select the field, then click on the **Move Up** or **Move Down** button.

4. If you want to overwrite any fields in existing records with the imported values, then check the **Overwrite** option for that field name. If you do not select the **Overwrite** option, then values in existing records will not be changed.

   You can save the format that you have defined so that you do not have to configure the fields again. Under the **Data** menu, select **Save Column Format**.

5. Next to the **Import File** field, click on the **Browse** button to locate the file.

6. If necessary, select the **Skip File Header** option to ignore any header information in the file.

7. Click the **Import** button.

When you close the window, you may be asked if you want to save the format for the import options (only if you have moved fields up or down). Choose **Yes** to preserve this format on this Control Center computer only. If you choose **No**, the list opens in its default format the next time you use this import function.

Generating Reports: Using Examiner

Examiner is a reporting package that you can use to create, customize, and print reports. Examiner includes a variety of standard reports that you can view and print without performing any customization. The instructions that follow show you how to access and print these standard reports.

For specific instructions on using Examiner's many features, or to create or customize your own reports, consult the Examiner online help.

Starting Examiner

To start the Examiner application, click on the **Start** button on the Windows Task Bar, select **Programs**, then select **MedSelect**, then select **Examiner 6.0**.

Viewing a Report and Setting Date Ranges

For some reports, you are prompted to enter a date range for the report information. If there are events listed on a report that do not have a required matching event (such as a Return event with no original Taken event), then the date range you specified may be too limiting (for instance, the original Taken event occurred before the begin date or time for this report). You may want to generate the report again with a broader date range.

Viewing a Report from Examiner

If Examiner is already open, you can view all reports by selecting the **Open** option under the **File** menu. Choose the report you want from the available list.

Printing a Report
To print a report that you are viewing, select the **Print** option under the **File** menu in Examiner.

Closing Examiner
You can close Examiner when you are finished, or leave it running in the background while you continue to use the Control Center.

Standard Reports

There are four general types of reports that are provided with SupplySource: **Refill**, **Management**, **Configuration** and **Nursing**. Each of these report types is described in the following sections.

Refill Reports

The Refill reports are used for picking the supplies needed for restocking the SupplySource stations. See **Restock Amounts** on page 61 for more information about these reports.

Refill Warehouse Selection to Maximum—Lists all positions that are below their maximum capacity and the quantity needed to restock those positions to their maximum capacity. This report would be used to pick the supplies needed to restock all positions to maximum.

Refill Warehouse Selection Below Minimum—Lists all positions that are below their minimum capacity and the quantity needed to restock those positions to their maximum capacity. This report would be used to pick the supplies needed to restock only positions that are below minimum.

Refill Warehouse Stockouts - Lists all positions that are at a zero quantity. This report would be used to pick the supplies needed to restock only positions that are empty.

Management Reports

These reports are used by the Materials Manager to better manage supply utilization.

Location Dollar Value—Lists all supplies by location and dollar value. This report can be used to review the supply stock at each station and current dollar value of each supply at that station.

Day of the Week Average Usage—Lists the average usage of supplies at a location by day of the week. This report can be used to spot trends in usage of a particular supply by day. For example, Sundays average 20 per day, Mondays average 40, etc.

Daily Usage—Lists the supplies that have been used at a location, and how many have been dispensed of each, within a specified date range. This report can be used to review the exact usage of supplies at a location during a certain time period.

Department Charges and Credits—Lists all supplies that were either charged or credited to a specific department because of an inventory discrepancy. When actual inventory is less than the system count, the department is charged for the discrepancy (Department Resolved Charge). When the actual inventory is greater than the system count, the department is credited (Department Resolved Credit).

Supply Usage by Location Graph—Shows the usage of all supplies in a location in bar graph form. This report clearly illustrates which supplies are used the "most popular" and the "least popular" at a location.

Staff Usage by Supply Graph—Shows supply name and cost of all supplies dispensed by each staff member in bar graph form. This report illustrates the dispensing history of each staff member, and the dollar value of those dispenses.

Audit Report—Lists all supply positions and their system quantities. Restock technicians can use this report to compare quantities on the shelf to the system quantity.

System Log Message—Documents most errors made in the system. It lists the date and time of the error, the interface and window where the error occurred, the type of error committed, and a description of the error. It also records user logins and logouts.

Supply List—Lists all the supplies that are available to be stocked in the SupplySource system.

Supply Expiration Date—Lists all supplies that are at or near their expiration date (the expiration dates must be entered by restock technicians). This report can be used by restock technicians to expire supplies that are unusable.

Refill Event Summary—Lists all restocking activity.

Supply Usage by Materials Name—Lists the usage of each supply by location. This can be used to pinpoint which departments have higher usage of particular supplies.

Discrepancy Report—This report is printed at the Control Center, please see page 84.

Configuration Reports

These reports display configuration information.

Available Positions—Lists positions that do not have supplies assigned to them.

Configuration—Lists each location, and the towers and controllers that make up that location.

Position Labels—Used to create "Supply Position" labels that should be affixed to each supply position as identification. The label lists the Item Number, Material Name, and Unit of Issue. Please see **Printing Dispensing Device Labels** on page 96 for label specifications. See the *SupplySource Restocker's Guide* for complete instructions on the placement of labels.

Nursing Reports

These reports are used by the Nursing Manager to manage staff and supplies in their department.

Nursing Inventory—Lists all supplies by location, sorted by tower. This report is "map" of each SupplySource station and can be used to verify the supplies available, and to inform newer staff of the supply availability at that station. It can also be used as a quick way to locate supplies in the case when there is a power outage and the cabinets must be accessed by key.

Staff Access Rights—Lists all users and their access rights.

Staff Usage by Location—This report lists each staff member's usage by department, and the supplies dispensed by that staff member, along with the dollar value of those supplies.

Printing Dispensing Device Labels

Examiner can generate labels that you can use to identify your supply positions. Position labels can be printed on standard Avery labels using the Position Labels Report (see **Configuration Reports** on page 95). These labels can be purchased from most office supply vendors. Print labels only after you have assigned a supply to each position.

Recommended brand: *Avery White Removable Multi-Purpose Labels* (#AVE6460)
(Formerly *Remove ‘Em Laser Labels*)
(1" x 2 5/8" - 30 labels/sheet, 25 sheets/box, 750 total labels/box)

See the *SupplySource Restocker’s Guide* for label placement instructions.

The color Position Indicator Labels (included with each SST) also need to be affixed to the supply positions. See the *SupplySource Restocker’s Guide* for instructions.

Control Center Advanced Tools

Using the Sort Feature

You can sort information on any browser you are viewing. To use the Sort feature, follow these steps:

1. While viewing the browser you want to sort, click on the **Sort** button on the toolbar.

2. In the **Column** field, select the field to use for the sort.

3. Select **Asc** or **Desc** to indicate whether you want to sort by ascending (Asc) or descending (Desc) order.

4. To select another field to use for a secondary sort, click on the **Add** button. A blank line opens for you to define the next field to use in the sort.

   You can also click on Insert to place a blank line between existing lines. The blank line is placed *before* the currently selected line. You can use as many fields as you like to define the sort. Click on **Delete** to delete the currently selected line.

5. Click on **OK**. The sort is performed.

Example: Sorting the patient browser first by last name, then by location

1. While viewing the patient browser, click on the **Sort** button on the toolbar.

2. In the **Column** field, select patient_last_name.

3. Select **Asc** for ascending order.

4. Click the **Add** button.

5. In the **Column** field of the new line, select location_number.

6. Select **Asc** for ascending order.

7. Click on **OK**. The sort is performed.

Using Standard Find, Smart Find, and the Filter

Using a find window, you can search for information on any browser you are viewing. Some browsers use a detailed find form called standard find, while others use a quicker find form called smart find. To use the find features, click on the **Find** button on the toolbar. The title of the find window that opens indicates whether it is standard or smart find.

The filter is similar to the standard find feature, but it "filters out" all of the information you haven't specified, and shows only the information that meets your criteria.

Standard Find and the Filter

The following table defines all of the selections you can define when using a filter or the standard find feature:

Heading	Definition	Options	Result
(	Denotes the beginning of a sequence of options	-Selected -Not Selected	- Indicates the start of a group of options - No group of options is desired
Column	Contains a drop-down list of all of the fields on the report or browser you are using.	Select a field	- The filter sorts by the field you select.
Operator	Defines the parameters of the sort. The Operator defines how the Value is used by the filter.	= < > < > < = > = begins contains ends	- Finds only those items **exactly** equal to the Value; the equals search is case sensitive - Finds only those items not equal to the Value - Finds all items less than the Value - Finds all items greater than the Value - Finds all items less than or equal to the Value - Finds all items greater than or equal to the Value - Finds all items that begin with the Value - Finds all items that contain the Value - Finds all items that end with the Value
Value	Defines an exact value, such as a name or ID number, NOT case sensitive	-Choose from the drop-down list -Enter a letter -Enter a word - Enter a number	- The Value is used to filter the browser or report, depending on the Operator you specified. The value field contains a drop-down list of fields on the form, but you are not required to choose from the list. You may type in the value you want to specify. You cannot search for double quotes ("). You may search for single quotes (').
)	Denotes the end of a sequence of options	-Selected -Not Selected	- Indicates the end of a group of options - No group of options is desired
And/Or	Prioritizes multiple options	-And -Or -Blank	- Finds more than one option - Finds only one or the other option - No options are desired

The filter and standard find features include **Add**, **Insert**, and **Delete** buttons. Use these buttons to add, insert, or delete data entry lines. If you add lines before you enter any data, the **And/Or** field defaults to **And**, but you can change this to **Or** if you like.

Note: While performing a filter or find, you can specify a search for information in a field that is either blank or not blank. To specify a search for a field that is blank, specify **=** in the **Operator** field, and do not put any data in the **Value** field. To search for any information except a blank field, specify **< >** in the **Operator** field, and do not put any data in the **Value** field.

The following examples illustrate the use of a the standard find and filter features:

Example: Finding all users with a disabled login
This example shows you how to quickly locate any record that matches the search criteria, in this case, any user with a disabled login. Follow these steps:

1. Under the **Maintenance** menu, select **User**, and then select **User Browser**.

2. Click the **Find** button on the toolbar.

3. In the **Column** field, select disable_login_flag.

4. In the **Operator** field, select =.

5. In the **Value** field, type **Y** (the = search is case sensitive, so you must type a capital Y).

   You should now have a find that reads: (disable_login_flag = Y).

6. Click on **OK**. The browser now highlights the first record of a user with a disabled login.

7. To find the next user with a disabled login, press **CTRL+N**. Do this to find each consecutive user with a disabled login.

Example: Filtering for all users with a disabled login

This example functions much like the find you performed in the previous example, but the result is different. Instead of finding the record among the list of all records in the browser, the browser is refreshed to show only those records that meet the search criteria. Follow these steps:

1. Under the **Maintenance** menu, select **User**, and then select **User Browser**.
2. Click the **Filter** button on the toolbar.
3. In the **Column** field, select disable_login_flag.
4. In the **Operator** field, select =.
5. In the **Value** field, type **Y** (the = search is case sensitive, so you must type a capital Y).

   You should now have a filter that reads: (disable_login_flag = Y).

6. Click on **OK**. The browser is refreshed to show only those records that meet the search criteria.

Resetting the Filter
After you have used the filter to filter a browser, you can reset the display to its original list or information. To reset the filter and restore the previous display, under the **Data** menu, select **Reset Filter**.

Smart Find
When you are viewing a browser like the Patient browser or Supply browser, you can locate a specific item using Smart Find. To locate an item, follow these steps:

1. While viewing a browser, click on the **Find** button on the toolbar.
2. Click on the corresponding radio button to indicate the type of information you are looking for.
3. In the text box, type the name of the item you want to find.
4. Click the **Find Next** button to find each consecutive occurrence of the item.
5. Click the **Close** button to close the Smart Find window.

Example: Using Smart Find to find all patients with a last name of Smith

1. Under the **Management** menu, select **Patient**.
2. Click the **Find** button on the toolbar.
3. Click the **Last Name** radio button.
4. In the text field, type **smith** (the search is not case sensitive).

   As you are typing, you see the browser selection jump to the first occurrence of the name Smith.
5. Click the **Find Next** button to find each consecutive patient named Smith.
6. Click the **Close** button to close the Smart Find window.

Data Entry Shortcuts

Some system users may prefer using keyboard shortcuts instead of the mouse for frequently used functions. The following list shows keyboard shortcuts you can use on most windows in the Control Center:

Shortcut Keys	Function
CTRL+A	Add
CTRL+C	Copy Selection
CTRL+D	Delete Selection
CTRL+F	Find
CTRL+I	Insert
CTRL+N	Find Next
CTRL+P	Print
CTRL+S	Save
CTRL+X	Cut
CTRL+Y	Paste Copied Item
CTRL+Z	Undo

Data Entry Fields

This section lists the Control Center windows in alphabetical order, and defines each of the data entry fields on those forms. **Required fields are underlined and highlighted**.

Cabinet Configuration Fields

Cabinet Description	A name that describes this SST. Every cabinet in the same location must have a unique description.
Location	The location of the cabinet. Choose the location from the drop-down list.

Client Configuration Fields

Node Name	The node name is a unique name (up to 16 characters) that identifies the computer that is running the client application. This can be any valid TCP/IP node name. Examples of valid node names are NWS3 or NWS_OR. The node name can contain a hyphen or underscore, but cannot contain spaces or special characters. Each computer's node name must be unique. Multiple applications can be installed on the same computer; in this case, each application is assigned to the same node name.
Department	The department where the client is located.
IP Address	The client computer's assigned IP address, which must be provided by the hospital's Information Systems personnel. The format for the IP address is ###.###.###.### where each ### segment can be a 1, 2, or 3 digit number.
Application Type	The type of application, such as Control Center.
Application Name	A name given to identify the application. When a new record is created, a default Application Name is created by combining the Node Name with the Application Type. You can use this default name or edit the field to be any name you wish to use.
Version	The version number of the software application that is currently running on the computer you have identified by node name. When you first add a client, the version is blank. The version number is only shown after the client application has been run for the first time.
CC Auto Logout (Properties)	The length of time, in seconds, that the Control Center application may sit idle before automatically logging out the user.
Report Criteria (Properties)	The number of days that should be retrieved on the Discrepancy report. For example, the number 5 indicates that the report show data from today and the past five days. The default value is 7.

Controller Configuration Fields

Address	The number assigned to the processor chip on the Controller. Maximum of 8 characters.
Type Description	A description of the device. This field is filled in automatically when you tab out of the Address field.
Display Terminal	The node name assigned to the Display Terminal that powers this Controller. Choose the Display Terminal from the drop-down list.
Cabinet Description	Identifies the SST that contains this Controller. Choose the description from the drop-down list.
Sequence Number	The number that describes the *physical order* of controllers when there is more than one. For example, a SST has 16 possible shelf controllers; the top controller has a sequence number of 1, the next lowest has a sequence number of 2, and so on. A SST Electronic Lock controller will always have a sequence number of 1 (there is only 1 per SST).
Controller Configuration	The numbers that describe the configuration of the devices attached to the controller. Choose the configuration of an Electronic Lock from the drop-down list. A Shelf controller will default to 18 (the maximum number of positions per shelf).

Department Maintenance Fields

Department Options:

Department	A name you create to identify a department.
DT Timeout	The length of time, in seconds, that a Display Terminal can be idle before automatically logging out the user.
DT Restock Timeout	The length of time, in seconds, that a Display Terminal can be idle during a restock before automatically logging out the user. This is usually longer than the regular DT Timeout.
DT Patient Usage	Indicates how many past hours' worth of time the Display Terminal should use to show patient usage information. For instance, a value of 48 indicates that the Patient Usage window shows all patient usage for the past 2 days. The default is 72 hours.
ID Card Leading Digits and Trailing Digits	These values determine how a user's ID string is read from a swipe card. Lead digits indicates how many numeric characters should be ignored at the beginning of the string. Alpha characters are automatically ignored. For example, if the lead string is A000, then Lead Digits should be set to 3 (because the "A" is ignored.) Trail digits indicates how many numeric characters to ignore at the end of the string but prior to the = sign. Every character after the = sign is ignored. All alpha characters in the trailing digits are also ignored. For example, if the string ends with 0A00=0B and the Trail Digits is set to 3, then the 0A00 is ignored. The 0B is also ignored because it appears after the = sign.

Department Maintenance Fields (continued)

Display Terminal Options:

Find Patient by ID	If checked, indicates that when a user performs a patient find at a Display Terminal, the Patient ID field is an option for specifying find data. Otherwise, the patient ID field is not an option for a patient find.
Not Available for Find/Add	If checked, indicates that patients in this department cannot be "found" by other departments when they do a patient search. The patient can still be found if searched for within its own department.
PIN Required	If checked, users must enter a PIN Number to log in. Not checked by default.

Department Maintenance Fields (continued)

Display Terminal Sorting:

Supply Name	Allows you to select the default display format for supplies listed in the Supply Browser. You can choose to show supplies by their Material or Nursing Name.
Patient Browser	Allows you to select the default sort order for patient records listed on the Patient browser. You can choose to display records alphabetically in order by patient name or the room description.
StockIt Window	Allows you to select the default sort order for supplies listed on the StockIt window. You can choose to display supplies by position or supply name.
Usage Browser	Allows you to select the default sort order for transactions listed in the Usage browser, which shows all supply transactions for a particular patient. You can choose to list the transactions in order chronologically by the date of the event, or alphabetically by the name of the supply involved.

Discrepancy Resolution Fields

Browser Fields:

Event Date	The date and time when the user reported the discrepancy.
Event Status	The type of event that was being transacted when the discrepancy occurred, such as Taken or Returned.
Res Stat	The status of the event that the system generated to resolve the inventory count. The following statuses are possible:
	<u>Dpt Chrg</u> Department Charge: this applies an additional charge to the department to make up for a discrepancy in which the system count is higher than the user corrected count.
	<u>Dpt Cred</u> Department Credit: this credits the department to make up for a discrepancy in which the system count is below the user corrected count.
	<u>Pat Cred</u> Patient Credit: this credits the patient account to make up for a discrepancy in which the system charged the patient for a supply that was never administered to that patient.
DT	The Display Terminal where the discrepancy was noticed and reported.
Supply Nursing Name	The nursing name of the supply that is discrepant.
User	The user who reported the discrepancy.
Res	Indicates whether or not the discrepancy has been resolved by showing Yes or No.

Discrepancy Resolution Fields (continued)

Detail Fields:

Patient	The patient for whom the supply was dispensed.
Supply Material Name	The manufacturer's brand name for the supply that was dispensed.
Supply Position	The dispensing position from which the supply was dispensed.
Room/Bed	The room and bed assigned to the patient.
Unit of Issue	The unit of measurement used to describe the volume of the supply that was dispensed.
Quantity Dispensed	The number of supply items dispensed during this dispensing event.
Resolved	If checked, indicates that you understand why the discrepancy occurred and that the discrepancy is resolved.
Resolution Description	A textual description you enter to explain why the discrepancy occurred, how it was resolved, etc. Maximum of 1000 characters. The name of the person who is logged in to the Control Center is appended to the description when it is saved.

Display Terminal Configuration Fields

Node Name The node name is a unique name (up to 16 characters) that identifies the Display Terminal. Examples of valid node names are DTORROOM or DTEYELAB. MedSelect encourages the use of DT as the first two letters of the node name. The node name can contain a hyphen or underscore, but cannot contain spaces or special characters. The node name must be unique.

Department The department where the Display Terminal is located.

Location The location of the Display Terminal. Choose the location from the drop-down list. This location is the default location, but you can assign other locations as well. Note that if you change the default location, the old default location continues to be assigned to the Display Terminal as a non-default location.

IP Address The Display Terminal's assigned IP address, which must be provided by the hospital's Information Systems personnel. The format for the IP address is ###.###.###.### where each ### segment can be a 1, 2, or 3 digit number.

Logging This determines the level of detail that is recorded in the Display Terminal's error log. The following logging options are available:

0 Indicates no logging.

1 Indicates status logging only. Status logging records information such as log in, log out, offline change, and online change.

2 Indicates debug logging. Debug logging records Display Terminal activities in detail, and can be used by MedSelect support personnel when troubleshooting the system.

The default setting is 1. You should use this default unless otherwise instructed by MedSelect.

Receipt Printer Check this box if the Display Terminal has an attached receipt printer.

Economy Tower Bins Fields

Cabinets	The economy cabinets in the database. Choose the SST you would like to configure from the drop-down list.
Doors	The list of doors that make up the above cabinet. One or more shelves will reside behind each door.
Bins	The compartments created behind each door using the Auto-Generate or Add button.

Facility Maintenance Fields

Facility Name	The name of the facility. Maximum of 60 characters.
# Login Tries	The number of times a user can unsuccessfully attempt to log in to a Display Terminal or Control Center before that user's account is disabled. An unsuccessful login means that the user entered the correct login ID but an incorrect PIN.
DT Find Closed Visit	If checked, indicates that a patient find performed at a Display Terminal searches for closed as well as open visit records. Closed visit records are shown only when there is no open or on-hold visit to display.
Positive Identification Login Required	If checked, indicates that all users in your facility must use a swipe card to log in to the Display Terminal. Logging on by manually entering a login ID is not permitted. The user is required to enter a unique PIN number in addition to using the swipe card.
Product Release Number	The version of the Control Center software you are running. This field cannot be edited. You may need to provide this number when calling MedSelect for support.

Location Maintenance Fields

<u>**Location Number**</u>	A number that identifies the location. The number can include letters, up to 15 characters.
Location Description	A description that can be used to help you identify the location. This description is not used in the system. It is used only on the Location Maintenance window.

Patient Detail Fields

ID Number	A number assigned by your facility to uniquely identify a patient. Maximum of 20 characters. (Note: if this field is blank in an existing record, then the patient was added at the Display Terminal. If you make any modifications to the record at the Control Center, then you must also fill in this field before saving.)
Prefix	Titles such as Dr., Mr., Ms., etc. Choose the title from the drop-down list.
First	The patient's first name or initial. Maximum of 15 characters.
Middle	The patient's middle name or initial. Maximum of 15 characters.
Last	The patient's last name. Maximum of 15 characters.
Suffix	Descriptors that follow a name, such as Jr., III, M.D., Ph.D., etc.
Address 1	The first line of the patient's address. Maximum of 30 characters.
Address 2	The second line of the patient's address. Maximum of 30 characters.
City	The city where the patient resides. Maximum of 30 characters.
State	The state where the patient resides. Maximum of 15 characters.
ZIP	The patient's ZIP code. Maximum of 10 characters.
Country	The country where the patient resides. Maximum of 30 characters.
Home Phone	The patient's home telephone number. Maximum of 14 characters.
Birthdate	The patient's date of birth (mm/dd/yyyy).
Gender	The patient's gender (choose Male, Female, Unknown, or Other from the drop-down list).
MRN	The Medical Record Number assigned to this patient. Maximum of 20 characters.
Allergies	A description of any relevant drug allergies the patient may have. Maximum of 450 characters. "NKA", "None" or "No Known Allergies" will appear in this field if the patient has no allergies or no known allergies.
External Patient ID	Unique identifier for a patient to an external hospital system. Maximum of 45 characters.

Patient Detail Fields (continued)

External System ID	Unique identifier for a patient to an external hospital system. Maximum of 20 characters.
Admission Date	The date (mm/dd/yyyy) and time (hh:mm:ss) that the patient was admitted.
Location	The room where this patient is staying. Choose a location from the drop-down list.
Bednumber	A number that identifies the bed assigned to this patient. Maximum of 8 characters.
Class	A description of the circumstances of the patient's admission (choose Inpatient, Outpatient, Emergency, Pre-admit, or Re-occurring from the drop-down list).
Height	The patient's height. Maximum of 10 characters.
Weight	The patient's weight at the time of admission. Maximum of 10 characters.
Admitting Physician	The name of the physician who admitted the patient. Choose the physician from the drop-down list.
Visit Number	A unique number assigned by your facility to identify this patient's visit. (Note: if this field is blank in an existing record, then the patient was added at the Display Terminal). If you make any modifications to the record at the Control Center, then you must also fill in this field before saving). Maximum of 15 characters.
External Account Number	Unique number representing a patient billing account within the hospital. Maximum of 20 characters.
Status	The current status of the patient's visit (choose Open, On-hold, or Closed from the drop-down list). Only open visits are displayed on SupplySource Display Terminals.
Close Date	The date (mm/dd/yyyy) and time (hh:mm:ss) that this visit status was changed to closed.
Discharge Date	The date (mm/dd/yyyy) and time (hh:mm:ss) that this patient was released from your facility.
Admin User	The administrator who last updated this visit.

Supply Assignment Fields

Expiration Date	The earliest date when a supply in a position expires. To clear the expiration date, select the field by double-clicking on it, then press the spacebar.
Lot #	The manufacturer's lot number for the supply with the earliest expiration date.
Minimum Quantity	The minimum quantity of this supply that you want to keep stocked at this position. The supply should be re-ordered when it reaches the Minimum Quantity. When a supply is stocked in multiple positions, it is recommended that the minimum for each position be set to 1 (see **Assigning Supplies to SupplySource** on page 76 for an explanation).
Maximum Quantity	The maximum quantity of this supply that you want to keep stocked at this position. Maximum quantities prevent over-stocking.

See **Supply Detail Fields** on page 119 for a description of all other fields used on the Supply Assignment form.

Supply Detail Fields

Material Name	The manufacturer's proprietary, US trademarked name for a supply. Maximum of 50 characters.
Nursing Name	The general, chemical, or non-brand specific name for a supply. You are not required to enter a Nursing Name, but if no Nursing Name is entered, then the Material Name is copied and used. Maximum of 50 characters.
Item Code	A unique number assigned by your facility to identify a supply. Maximum of 15 characters.
Unit of Issue	The type of unit the supply is issued in, for example, box, bag, etc. Maximum of 8 characters.
System Quantity	The actual quantity of the supply currently stocked in SupplySource. This quantity cannot be changed at the Control Center, but can be edited only at the Display Terminal.
Minimum Quantity	The minimum *system-wide* quantity of this supply that your facility wants to keep stocked in SupplySource. The supply should be re-ordered when it reaches the Minimum Quantity. Some industries may refer to this as the *par* quantity for an item.
Maximum Quantity	The maximum *system-wide* quantity of this supply that your facility wants to keep stocked in SupplySource. Maximum Quantities prevent over-stocking.
Charge Code	A hospital assigned code that indicates the charge for this supply. Maximum of 25 characters.
Cost	The latest cost per unit of the supply.
Billing Required	If checked, indicates that any dispenses of this supply should be sent to the billing interface.
Return to Original Drawer	Checked by default, indicates that the user must return this supply to the position from which it was originally taken.

Supply Detail Fields (continued)

Customer Defined Class (See page 47)	The class assigned to this supply by the Administrator. The Administrator can give permission to restock and/or dispense this class to individual users and user groups.
Vendor Number	A number assigned by the vendor to identify its product. Alternatively, you may wish to use this field to specify a number that identifies the vendor to your facility. Maximum of 15 characters.
Store Room Location	A description of the location within the hospital where this supply is located. Maximum of 25 characters.
Manufacturer Part Number	The number assigned to this supply by the manufacturer.

User Detail Fields

Name Prefix	Titles such as Dr., Mr., Ms., etc. Choose the title from the drop-down list.
First Name	The user's first name or initial. Maximum of 15 characters.
Middle Name	The user's middle name or initial. Maximum of 15 characters.
Last Name	The user's last name. Maximum of 15 characters.
Name Suffix	Descriptors that follow a name, such as Jr., III, M.D., Ph.D., etc.
ID Card Number	A number that may be used to log in to the Display Terminal. This number may be encoded on a magnetic swipe card, or typed in manually at the Display Terminal Login window. Maximum of 9 numbers.
Username	A unique name that identifies the user to SupplySource. For instance, you may want to assign each user a name by combining the first name with the last initial. In this case, John Jones would be johnj. This name is used for logging in to the Control Center, and is not required if the user is not to be given access to the Control Center. Maximum of 15 characters.
Group Profile	The group profile, which includes associated access rights, that has been assigned to this user.
Disable Login	If checked, indicates that this user account has been disabled and cannot be used to log in to SupplySource.

User Detail Fields (continued)

Access Rights

System:

Control Center Login	This right allows the user to log in to the Control Center, view patient info, and print reports.
Account Adjustment	This right allows the user to transfer events between patient accounts using Account Adjustment, and to assign unknown events to patient accounts using Inventory Adjustment.
Administrate	This right gives the user the ability to maintain user accounts, including group profiles. It also gives the user the ability to maintain facility and department information. At the Display Terminal, this right gives the user the ability to add temporary users.
Configuration	This right gives the user the ability to modify the system configuration information.
Discrepancy Resolution	This right allows the user to resolve discrepancies at the Control Center.
Inventory	This right allows the user to add, update, and delete supply information through the Control Center. This right also allows the user to assign supplies to positions, adjust supply minimum and maximum quantities, and expire supplies.

User Detail Fields (continued)

Access Rights (continued)

Maintenance	This right allows the user to add, update, or delete Location information. It also allows the user to use Location Import. At the Display Terminal, this right allows the user to exit the Display Terminal application by displaying an **Exit** button on the Patient browser. The button is only displayed to users with the Maintenance Right.
Patient Management	This right allows the user to add, update, and delete patient information, and to close visit records *at the Control Center.* Users without this right may still view patient information. This right has no impact on the user's ability to add a patient at the Display Terminal. All users with DT Login rights may add patients at the Display Terminal.

Display Terminal:

SS & DT Login	This right allows the user to log in to a Display Terminal, dispense supplies, and add or find patients at the Display Terminal. A user who attempts to log in to a Display Terminal must also be assigned to the same department as that Display Terminal.
Restock	This right allows the user to enter the Restock Browser. Once in the Restock Browser, the user must have the Restock right for the supply in the position being restocked.

Defined Class:

Dispense and Restock Rights Defined by Administrator	These rights allow the user to restock and/or dispense classes of supplies previously defined by the administrator through the Control Center. If no classes are defined, this area will be empty. (See page 47.)

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