medSELECT

SUPPLYSOURCE

Display Terminal Dispensing Guide

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

Document History

Document Number	Date	Remarks
TP-820492-001A	7/2000	First Printing
TP-820492-001B	6/1/2002	Insert MedSelect company name & logos Update MedSelect Support Center Info Remove "Plus" from SupplySource Update Patents, Trademarks and Copyright
TP-820492-001C	1/28/2004	Update to Release 6.5. Clarified the separation of the FindIt and TakeIt functions

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.

Other MedSelect patents pending: 09/014076, 09/086857, 09/288685, 09/384650, 09/428035, 09/428036, 09/578540, 09/848633, 09/849625, 09/921014.

Contents

Introduction

This manual provides instructions for dispensing supplies with the Display Terminal, a component of the SupplySource System. The Display Terminal is a touch-screen computer that makes it possible to dispense supplies for a selected patient, access patient information, and restock your system inventory. The Display Terminal is often referred to as the DT.

While working at the SupplySource Display Terminal, you can open the online help for additional information or instructions. Touch the **Help** button on any window or press **F1** on the keyboard to open the online help

The Display Terminal provides the following features:

- You can select patients at the SupplySource DT so that all supplies given to the patient are attributed to that patient. The Display Terminal shows open and on-hold patient visits only. When a patient is discharged from the hospital, the visit is closed and the patient name is removed from the SupplySource DT to ensure that no further charges are incurred.

- You can dispense supplies from supply lists or procedure lists. These supplies are contained within MedSelect System dispensing towers or storage areas. System users are assigned access rights, which may limit their supply dispensing privileges.

- The SupplySource Display Terminal shows all the supplies that have been taken or returned for each patient.

Overview of SupplySource

The following section is an overview of the 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 may include the following devices:

Display Terminal with Barcode Scanner

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

A barcode scanner is included with SmartStock, an optional inventory restocking and medication verification package that you can use with your MedSelect Medication Tracking and Distribution System. The barcode scanner is used to track inventory status and upload it to the Display Terminal

SupplySource Tower (SST)
The SupplySource Tower gives you ultimate control over inventory and the entire distribution process by providing convenient yet controlled access to supplies. The system enables you to reduce or even eliminate many of the steps that impact labor and inventory costs.

The Tower shelves can be configured *at the station* in a variety of ways to provide a multitude of storage options.

The SupplySource Tower features both sliding and fixed shelves with solid bottoms that stop spills and reduce the likelihood of supplies tipping. The slide-out shelves provide easy access to supplies and are easily divided into as many as 18 compartments. Removable bins are available for fixed shelves.

Economy Tower
The Tower provides a cost-effective solution for the inventory tracking of supplies such as intravenous solutions and tubing, medical supplies, nutrition supplements and other bulk supplies. The Tower provides for 26 cubic feet of storage.

MedSelect's Economy Tower Module works in conjunction with all other MedSelect modules and is designed to provide controlled access to intravenous medications as well as general hospital supplies.

The Tower features both sliding and fixed shelves with solid bottoms that stop spills and reduce the likelihood of supplies tipping. The slide-out shelves provide easy access to supplies and are easily divided into as many as 18 compartments. Removable bins are available for fixed shelves.

Display Terminal Global Functions

The Display Terminal is a computer with a touch screen and a keyboard. The touch screen provides a fast, user-friendly way to enter and retrieve information at the touch of a button. A light touch on the screen is usually enough to cause a response. An audible tone indicates that the screen has been touched. If you do not hear a tone, you may not be pressing the screen firmly enough. Never touch the screen with a pen, pencil, fingernail, or any sharp object that could damage the screen.

The keyboard is used for entering patient information, and can be used instead of the touch screen whenever you need to enter data.

While working at a Display Terminal, you can open the online help for additional information or instructions. Touch the **Help** button on any window or press **F1** on the keyboard to open the online help.

Using the Receipt Printer

A Display Terminal with a receipt printer automatically prints a receipt whenever a supply is dispensed or a position is restocked.

If your system includes receipt printers, you can refer to the manual provided with the printer for instructions on care and usage, and for directions on paper replacement, indicator lights, and other settings.

Standard Sorting Features

The following buttons appear on many of the Display Terminal windows. They are used to change the sort order of different lists of information. Each time you sort a list; an asterisk (*) in the column headings indicates the column that is defining the sort (for instance, a list of supplies sorted by their nursing name is indicated by an asterisk next to the **Nursing Name** column heading).

Nursing/Material Name

This button allows you to select whether you want to show supplies by their Nursing name (generic) or Material name (trade). Each time you press it, the button title toggles between **"Nursing Name"** and **"Material Name"**, and on most windows, *the list is re-sorted alphabetically*. The column heading also changes to indicate **Nursing Name** or **Material Name.**

On the Patient Usage Window, the list is not resorted alphabetically because the supplies are listed in reverse chronological order.

Supply/Supply Position

This button allows you to select whether you want to list supplies alphabetically by the supply name or supply position. Each time you press it, the button title toggles between **"Supply"** or **"Supply Position"**, and *the list is re-sorted alphabetically*. The supply name that is shown depends on the status of the **Nursing/Material Name** button.

Sort by Room/Name

This button allows you to select whether you want to list patients alphabetically by their name (last name first) or room assignment. Each time you press it, the button title toggles between **"Sort by Room"** or **"Sort by Name"**, and *the list is re-sorted alphabetically*.

Sort by Supply/Time

This button allows you to select whether you want to list items by the supply name or by the associated time. Each time you press it, the button title toggles between **"Sort by Supply"** and **"Sort by Time"**, and *the list is re-sorted alphabetically (for supply) or chronologically (for time).* This button is also available on the Patient Usage window and causes the list of usage events to be re-sorted alphabetically (for supply) or reverse-chronologically (for time).

Display Patient ID/Visit

This button allows you to select whether you want to list a patients ID number or Visit number. Each time you press it, the button title toggles between **“Display Patient ID”** and **“Display Visit ID”**.

Other Standard Features

The following buttons appear on many of the Display Terminal windows:

Prev Page	Press to scroll up to the previous page of items in a list.
Next Page	Press to scroll down to the next page of items in a list.
Close	Press to exit the current window and return to the previous window. You can exit out of most windows without completing a task by touching the **Close** button.
Help	Press to open context-sensitive online help. The topic that opens contains specific information and instructions for the window you were viewing.

Keyboard Searching

On many browsers, you can use the keyboard search to quickly locate an item in a list. The search is performed on the column that the list is sorted by.

1. While viewing the browser, begin typing the name of the item you want.

   As you type, note that the list jumps to the first item matching your input, and it highlights the characters. The search continues to locate an item until your input can no longer be matched to an item in the list. If you begin by typing characters that cannot be matched, your input is ignored until the first match is made.

2. If the highlighted characters are part of the item you want to select, you can press the **Enter** key to quickly select the entire line.

3. You can backspace and continue typing if you make a mistake or if you are unsure about a spelling.

4. To reset the search, press the **ESC** key on the keyboard. This clears the search so that you may start over.

   The search is also reset if you select an item in the list by touching it, or if you press any button that changes the sort order of the browser (for example, a **Nursing/Material** or **Sort by Room/Name** button).

5. On browsers that allow you to select multiple items (such as FintIt), you can perform a search for an additional item after another item has been selected (highlighted). All items you select (highlight) remain selected while you perform additional searches.

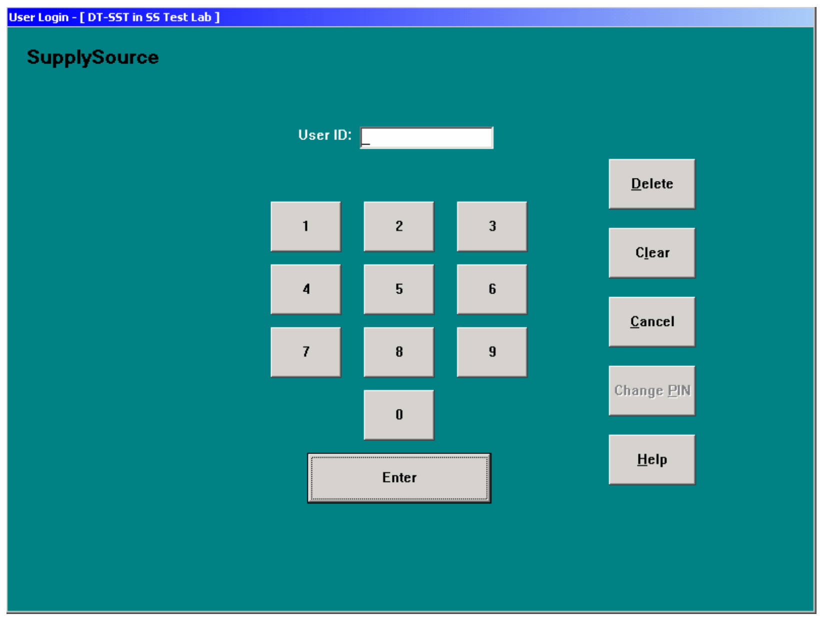
Keyboard Substitutions

The following keys on the keyboard can be used as an alternative to touching the screen:

Page Up	The Page Up **(Pg Up)** key can be used instead of the **Prev Page** button on the touch screen.
Page Down	The Page Down **(Pg Dn)** key can be used instead of the **Next Page** button on the touch screen.
Number Keys	The keyboard number keys can be used instead of the number buttons on any window where a keypad is used to enter numbers for user identification or supply quantity.
Enter Key	The **Enter** key can be used instead of the **Enter** button on the Login Window, and to respond to dialog windows with only an **OK** button in them.
Backspace Key	The **Backspace** key can be used instead of the **Delete** button on windows where a keypad is used to enter numbers for user identification or supply quantity.
F1	The **F1** key opens the online help.

Logging In and Logging Out

You must log in to the Display Terminal before using it to dispense supplies or obtain information.



Standard Login

To log in to the Display Terminal, you must have a valid login ID number. This number is available from your system administrator. If all of the buttons on the Login window are grayed out, then you are required to use your swipe card to log in to the Display Terminal.

To log in to the Display Terminal

1. Type your User ID, then press the **Enter** button. The ID numbers are represented by asterisks (*).

   You can also log in by scanning your user barcode.

   If the Display Terminal is equipped with a card reader, you can enter your login ID by swiping your card through the reader.

(If there is a place to enter a PIN number on the Login screen, enter your PIN before pressing the **Enter** button.)

To backspace while typing, press the **Delete** button (on the touch screen). To clear the entire current field, press the **Clear** button. To start over at step 1, press the **Cancel** button.

2. When you have logged in successfully, the Patient Browser opens. The Patient Browser provides access to many of the Display Terminal's routine functions.

To log out of the Display Terminal

1. Close all windows until you return to the Patient Browser.
2. Press the **Logout** button.

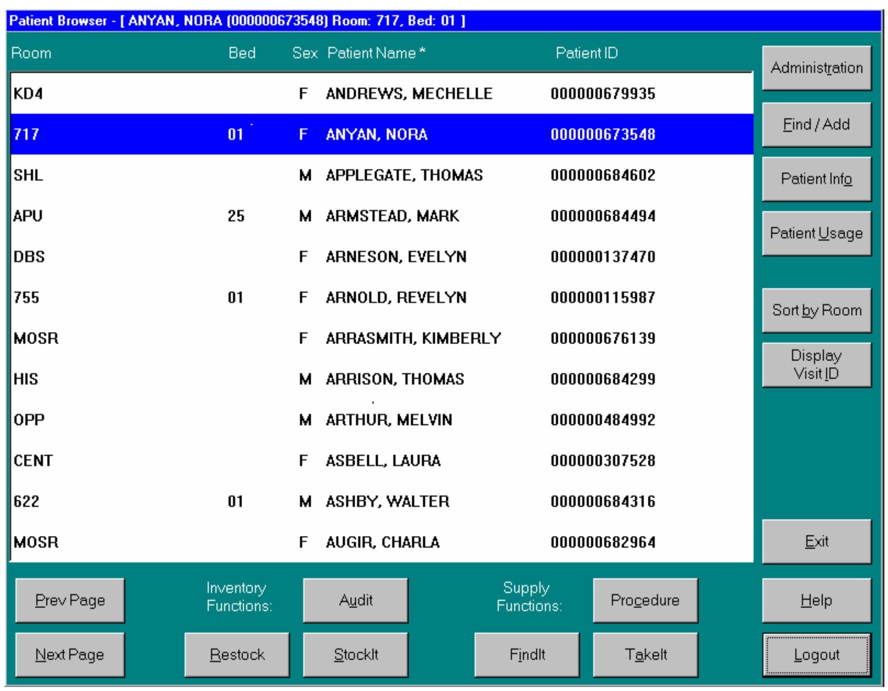
Dispensing Supplies

The following sections describe the general procedures for selecting patients, dispensing supplies for a patient, and obtaining information about patients.

Selecting Patients

The Patient Browser allows you to select a patient and then dispense supplies, view personal information, or view a list of supplies used by the patient. To perform any of these actions, select (highlight) a patient name by touching it, and then press the button for the action you want (you do not need to select a patient before pressing the **Find/Add** button).

If you know a patient is already listed at a Display Terminal, you can use the keyboard search to quickly find the patient's name.



Finding and Adding Patients not Listed at a Display Terminal

A patient assigned to a particular location should be listed on the Display Terminal(s) that service that location. If a patient is not listed but is believed to be entered into the system, you can perform a *find* for that patient. If the patient is not found in the system, you may perform an *Add*. You must try to find a patient before adding a new record. This prevents users from creating duplicate records for the same patient.

To find a patient not already listed at the Display Terminal, or to add a patient

1. On the Patient Browser, press the **Find/Add** button.

2. Enter the patient's last name (and/or patient ID, if the Patient ID field is available. The system administrator controls whether or not the Patient ID field is used).

   The first name is optional, and may be left blank. If you are unsure of the spelling of the last name, you can type only the first few letters of the last name and perform a "begins with" search. Using only one letter (like the letter "s") for a "begins with" search is not recommended because the data retrieval could take a long time.

   If you enter a patient ID, the search is based on the ID number. If you do not, then the search is based on the last name.

3. Press either the **Find** or **Begins With** button. All patients matching the criteria are displayed.

   - **If patients matching the name were found**...

     If the patient found is the patient you want, then touch the patient name and press the **Select** button. If the patient was originally assigned to a different location, the patient is now temporarily assigned to the same location as the Display Terminal you are using for as long as you are logged in, but also continues to be listed at the Display Terminal originally assigned. When you log out, this patient is no longer displayed at your Display Terminal.

     If you found a patient with an identical name but it is not the same patient, make sure the patient name is not selected (touch the name to unselect it), then press the **Add** button. The screen returns to the Patient Browser and the new patient name is displayed. A new patient record is created in the database, and the patient is assigned to the location that is the default location for the Display Terminal where the patient was added. This assignment is permanent for as long as the patient has an open or on-hold visit record.

- **If no patients were found**...

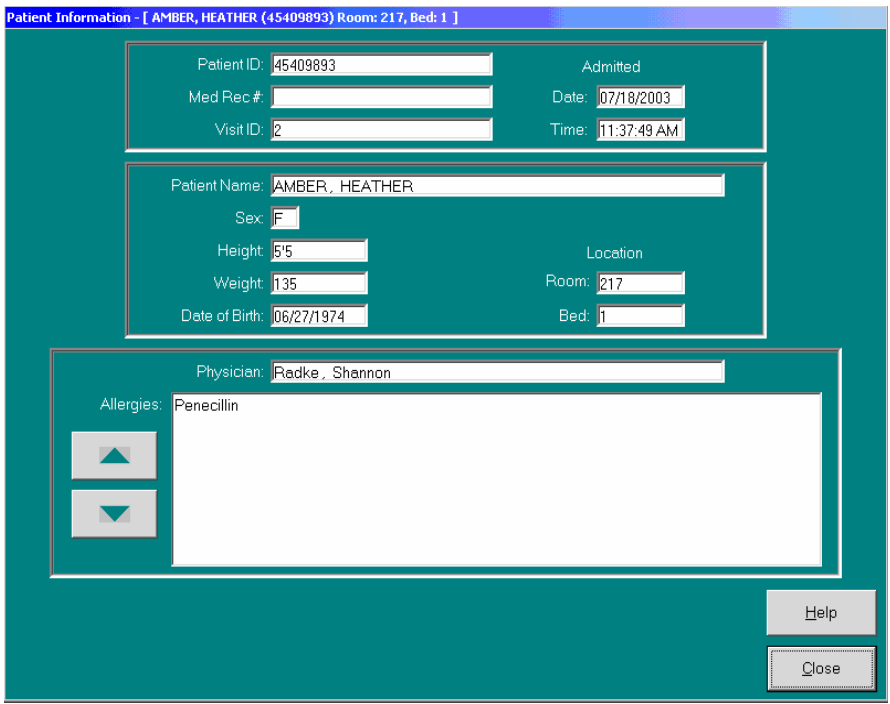
  You are asked whether or not you want to create the patient.

  Press **No** if you do not want to add this patient to the Display Terminal, and then press **Find Again** to perform a new search, or press the **Close** button to exit from the window.

  Press **Yes** if you want to add this patient. The screen returns to the Patient Browser and the new patient name is displayed. A new patient record is created in the database, and the patient is assigned to the location that is the default location for the Display Terminal where the patient was added. This assignment is permanent for as long as the patient has an open or on-hold visit record.

Viewing Information about Patients and Usage

You can view information about a patient, including personal data and supply usage.



To view information about a patient

1. Touch the patient name to select (highlight) it.

2. Press the **Patient Info** button.

   The Patient Information window opens and displays details about the patient. Patient Information cannot be edited at the DT. This information normally is entered at the Control Center or downloaded through the system interface. If the patient was added at the Display Terminal, then only minimal information is shown.

To view the list of supplies used by the patient

1. Touch the patient name to select (highlight) it.

2. Press the **Patient Usage** button.

   The Patient Usage Browser shows supplies that have been dispensed for the selected patient in reverse chronological order (the most recently dispensed supply is at the top). The usage list goes back as far as the number of days specified by the system administrator at the Control Center. To change the duration, see your administrator.

   The browser also shows Resolved and Returned events, and any credits or adjustments.

Dispensing Supplies from a List (FindIt)

From the Patient Browser, you can select a patient, and then dispense one or more supplies to be used for the patient from the Med/Supply Browser.

You can only dispense supplies in cabinets that are attached to the Display Terminal you are using. You cannot dispense supplies in cabinets that are serviced by another Display Terminal.

To dispense supplies from a list

At the Display Terminal:

1. Login to the Display Terminal.
2. On the Patient Browser, touch a patient name to select (highlight) it.
3. Press the **FindIt** button to open a browser that lists all of the supplies that may be dispensed from this Display Terminal.

   The patient's name, ID number, Room and Bed are shown in the title bar of the Med/Supply Browser.
4. Touch the supply name to select (highlight) it.

   To quickly locate a supply, you can use the keyboard search.
5. Choose the quantity of the supply you want to dispense. For quantities of 10 and above you must use the keypad.

   Continue to touch additional supply names and the quantities to dispense to select multiple supplies.

   Previously selected supplies are highlighted in black, and the most recently selected is highlighted in blue. To unselect a supply, touch it again.
6. Touch the **Find** button. The cabinet door(s) you have the rights to access will unlock and the position LED(s) associated with the supplies you selected will flash. (To cancel the FindIt, press the **Cancel** button.)

   Note if you are using the Economy Tower there will be no position indicators for the supplies.

<u>At the SupplySource Towers:</u>

7. Open the door(s) of the supply or supplies. Remove the supply or supplies. The Find-It function is completed.

   Repeat for all supplies needed

   Note: The system switches from FindIt mode to TakeIt mode automatically. See the next section for a description of the Take-It function.

8. Close the cabinet door(s).

<u>At the Display Terminal:</u>

8. The Find-It supplies are displayed on the TakeIt Browser Window. TakeIt supplies, if any, are displayed also.

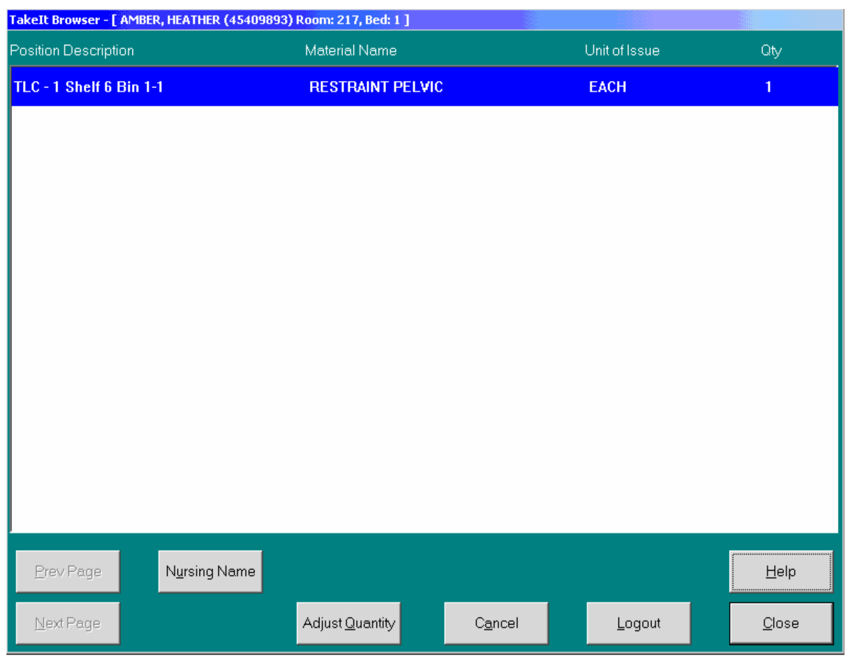
9. Press the **Accept** or **Logout** button on the Display Terminal. When the Accept or Logout button is selected, all of the LEDs will go out and the doors are all locked.

Dispensing Supplies without a List (TakeIt)

From the Patient Browser, you can select a patient then dispense one or more supplies to be used for the patient without first choosing the supplies from the Med/Supply Browser.

You can only dispense supplies in cabinets that are attached to the Display Terminal you are using. You cannot dispense supplies in cabinets that are serviced by another Display Terminal.

Note this feature is available when using the SupplySource Tower but is not available with the Economy Tower.



To dispense supplies without a list

At the Display Terminal:

1. Login to the Display Terminal.
2. On the Patient Browser, touch a patient name to select (highlight) it.

3. Press the **TakeIt** button. All cabinet you have the rights to access will unlock. (To cancel the TakeIt, press the **Cancel** button.)

At the SupplySource Towers:

4. Open the door of the supply you want to take. Press the position indicator (green, blue, or red dot) for the supply needed. Press the numeric button to indicate the quantity you are taking. Remove the supply.

   You can also scan either a shelf position barcode or a supply barcode.

   Repeat for all supplies needed. The supplies taken will appear on the DT TakeIt Browser window.

5. Close the door(s).

At the Display Terminal:

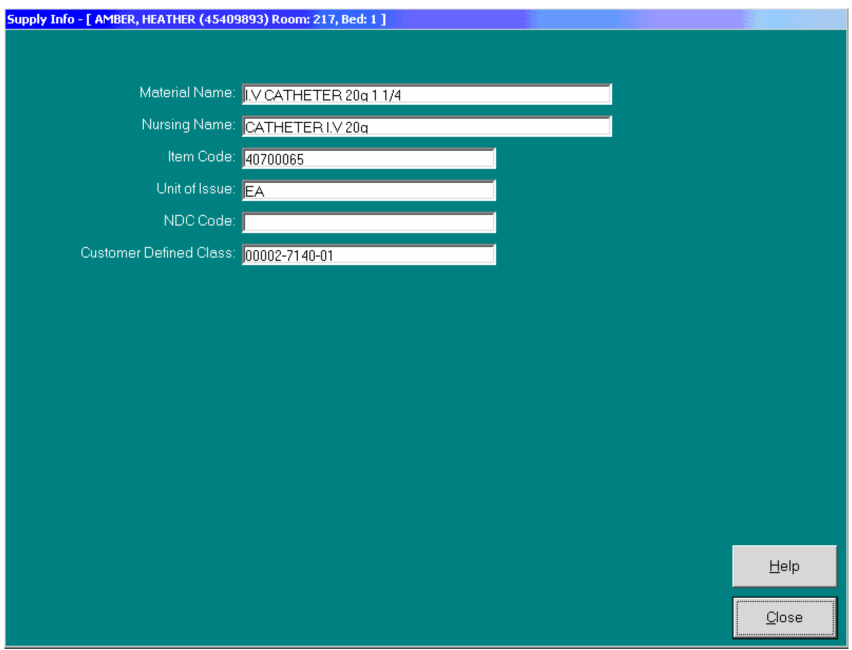
6. The supplies are displayed on the TakeIt Browser Window

7. Press the **Accept** or **Logout** button on the Display Terminal. When the Accept or Logout button is selected, all of the LEDs will go out and the doors are all locked.

Viewing Information about Supplies

You can view information about any supply listed in the Med/Supply Browser before you dispense it. Supply information may include any of the following details:

- Material Name
- Nursing Name
- Item Code
- Unit of Issue
- NDC Code
- Customer Defined Class



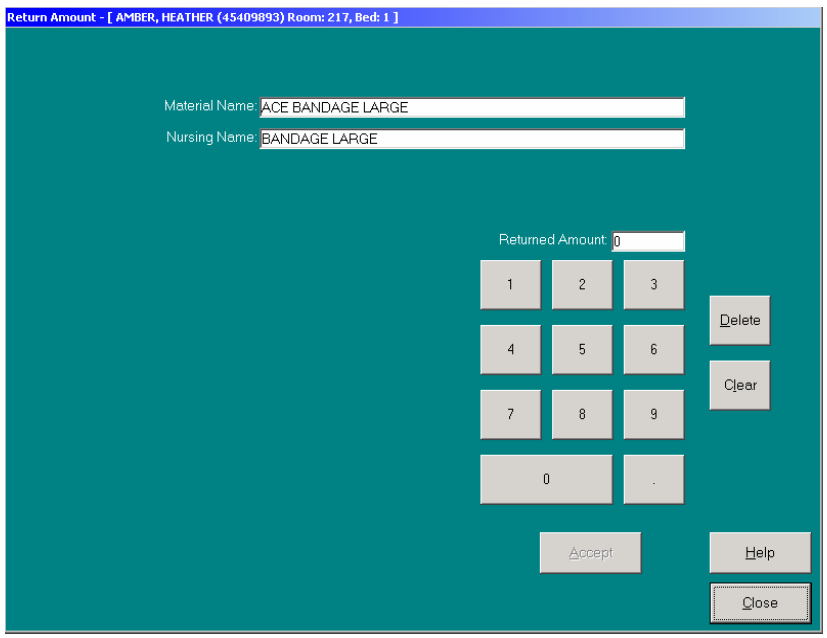
To view details about a supply

1. Touch a supply name in the Med/Supply Browser to select (highlight) it.
2. Press the **Info** button to view detailed information about the selected supply.
3. Press the **Close** button to return to the Med/Supply Browser.

   When you return to the Med/Supply Browser, the supply is still highlighted. Be sure to unselect the supply if you do not plan to dispense it.

Returning Supplies (ReturnIt)

If you must return a supply, you can record the event by using ReturnIt. You might return a supply when it is refused by the patient, or if the supply is not what you needed. Refer to your hospital's policies when deciding whether or not to return a supply.



To return a supply

1. Login to the Display Terminal.

2. On the Patient Browser, select (highlight) the patient for whom the supply was dispensed.

3. Press the **Patient Usage** button.

   The Patient Usage Browser shows all of the supplies that have been dispensed for the selected patient.

4. To return a supply, touch the name of the supply to select (highlight) it, then press the **ReturnIt** button.

5. Use the numbered keypad to enter the exact amount of the supply, in the unit of issue that you want to return.

   You cannot return more than the amount that was taken. You do not however, have to return the entire amount taken.

6. When you have entered the correct return amount, touch the **Accept** button.

   The cabinet door unlocks, and the position LED flashes.

7. Return the supplies and close the door. Press the **Close** button on the DT.

Administrative Activities

This section explains how to perform some administrative duties at the Display Terminal. These activities are reserved for users who are authorized and who have the required access rights.

The following are administrative duties:

- Configuring cabinets and controllers, and managing supplies (ConfigureIt)
- Adding a Temporary User (Add User)

Logging in as an Administrator

Administrative activities require administrative access rights. This login allows you to select activities from a menu of administrative duties.

To log in and choose an administrative function

1. From the User Login window, type your User ID, then press the **Enter** button. The ID numbers are represented by asterisks (*).

   If the Display Terminal is equipped with a card reader, then you can enter your login ID by swiping your card through the reader.

   (If there is a place to enter a PIN number on the Login screen, enter your PIN before pressing the **Enter** button.)

2. Press the **Administration** button, an Administration menu opens and presents you with choices for administrative activities.

   If the **Administration** button is grayed out, then you do not have sufficient access rights to perform these administrative duties.

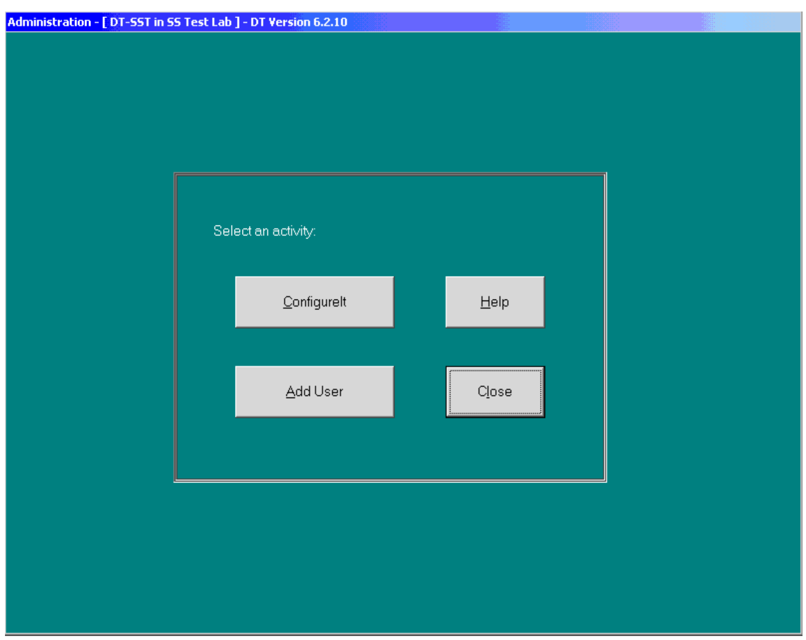
3. Touch the button for the activity you want to perform. If any button is grayed out, then you do not have sufficient access rights to perform that activity.

Adding Temporary Users

You can add a temporary user at any Display Terminal. The user account you add is valid only in the Display Terminal's department. To add a user, you need that user's hospital ID number. When you provide the ID, SupplySource verifies that the user is not already entered in the system. If not, then you may add the user by providing the person's first name, last name, and *an expiration date or length of time for the user's account*. If the user's account already exists, you can add the user to your department or, if the user is already in your department, extend its expiration date or change the user's access rights. The access rights you assign to a temporary user cannot exceed your own rights.

When you add a temporary user, you cannot specify an expiration period of greater than five days. However, as the expiration date draws nearer, or even after the account has expired, you can reset the expiration period to any length up to five days. You can reset this value as often as necessary.

Permanent users cannot be added or updated at the Display Terminal, but can be added at the Control Center.



To add a temporary user to your department

1. Login and press **Enter**.
2. Press the **Administration** button.
3. When the Administration menu opens, touch the **Add User** button.

   The Add Temporary User-User ID window opens.

4. Type the user's ID, then press the **Enter** button. You may also swipe the user's ID card to enter the number.

   If the window does not display a first name, last name, and expiration date, then this user's account does not yet exist in the system. Proceed to Step 4.

   If a user account already exists, you may see any of the following information:

   <u>Name exists and expiration is none</u>: this means that the user exists in the SupplySource system, but is not assigned to your department. Proceed to Step 4.

   <u>Name exists and expiration is unlimited</u>: this means that the user is already assigned to the department. If so, you cannot modify the user's account in any way from the Display Terminal. Close the Add Temporary User window.

   <u>Name exists and there is a date in the expiration field</u>: this means that the user has already been assigned to the department as a temporary user. If so, you can change the user's access rights, or extend the account's expiration date within your department.

5. On the Add Temporary User window, enter the user's last name (tab) and first name.
6. If desired, select one or more access rights for the user.

   The access rights you select cannot exceed your own. The list of access rights only displays access rights that are assigned to you.

   Note that the Display Terminal Login right is automatically assigned to a user that is added at a Display Terminal. You do not need to assign this right. If you do not choose any additional access rights, then the user is authorized only to log in to the Display Terminal to dispense supplies.

You cannot assign Control Center access rights from a Display Terminal. These rights can only be assigned at the Control Center.

7. Set an expiration date for the user's account by specifying its valid length of time.

   In the **Days** and **Hours** fields, enter the number of days and/or hours for which this user's account remains active. The maximum number of days allowed is 5. The expiration date is created automatically based on the days and hours you specify, and is displayed the next time someone views this user's account.

   To immediately expire this user's account, press the **Expire Now** button. This can only be done once you've added a user and accepted your changes.

8. When you are certain that all of the information you have entered is correct, press the **Accept** button.

   The window closes and the Display Terminal returns to the Administration menu. Press the **Close** button if you are finished with administrative duties.

Configuring at the DT with ConfigureIt

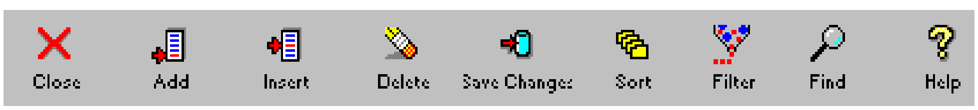
You can configure cabinets and controllers, and manage supplies at the Display Terminal using the ConfigureIt function, although initial configuration will be handled at the Control Center.

To configure at the DT using ConfigureIt

1. Login and press **Enter**.
2. Press the **Administration** button.
3. Press the **ConfigureIt** button. This will open the ConfigureIt software application. All cabinets you have access rights to will open.

The ConfigureIt Toolbar

Depending on the window you are viewing, the ConfigureIt toolbar may contain any of the following buttons.

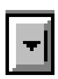


Close	Closes the current window.
Add	Adds a new item to the list or form you are viewing.
Insert	Inserts a new item directly above the currently selected item in a list.
Delete	Deletes the currently selected item from the list you are viewing.
Save Changes	Saves the current entry.
Sort	Sorts information on any browser you are viewing.
Filter	Filters information on any browser you are viewing
Find	Finds information on any browser you are viewing.
Help	Activates the context sensitive online help.

Positioning the Toolbar

You can reposition or remove the toolbar from the screen by pressing **Toolbars** under the Window drop down menu (one of the windows must be open to perform this function). This will open a **Customize Toolbars** dialog box with a list of several options. To remove the toolbar, select **Hide**. The toolbar is removed until the next time you logon and use ConfigureIt. To reposition the toolbar, press **Left**, **Top**, **Right**, **Bottom**, or **Floating**. If you select floating, the toolbar becomes its own small window. Press **Done** when you are finished making your selection.

Drop-down lists
A drop-down list is a list of valid items that may populate a data field. Drop-down lists usually contain information that is maintained elsewhere within the system. Drop-down lists are indicated by a button with an arrow pointing downward.



Touch this button to open the list, which appears to "drop-down" from the field. Select 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.

Some browsers contain information that can be edited directly in 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 form displays details about a specific item or person. For instance, a supply detail shows detailed information about the supply, such as Charge Code, Vendor Number, etc. Detail forms are often accessed by choosing an item on a browser.

Required Fields
A detail or entry form often contain 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 form that has a white background can be edited. Fields with a non-white 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 form, the Tab key causes the cursor to move from one field to the next. The Enter key does not perform this function.

On browsers, the tab key moves the cursor around the window. Enter keys usually perform an action on a selected item within the browser.

Check Boxes
Check boxes indicate 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 ConfigureIt Application
You may want to have several windows, such as a Supply Browser, and Supply Detail open 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 touching the Window menu option, you can view a list of open windows. Select one of the window names to bring that window to the foreground.

Viewing Online Help
ConfigureIt includes context sensitive online help. This means that whenever you open help, the topic that appears contains specific instructions on the ConfigureIt form or window you were using.

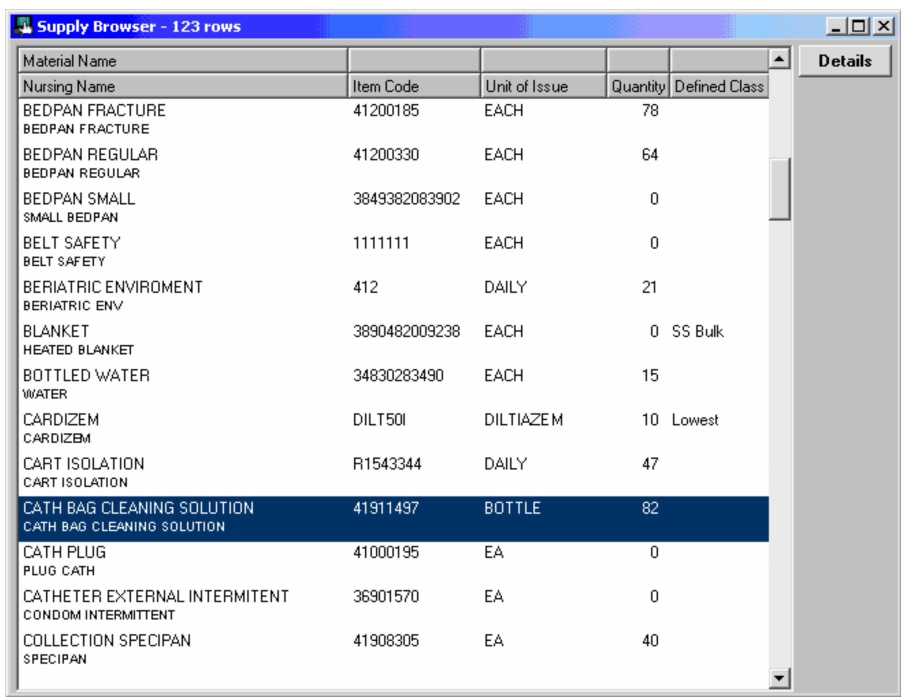
To open help, you can touch the **Help** icon in the menu toolbar .

Managing Supplies Using ConfigureIt

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 supply listed in the browser, add a new supply and delete a supply.

In the Supply Browser, 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.

Note: You must have the Inventory access right to use Supply Management



Material Name / Nursing Name	Item Code	Unit of Issue	Quantity	Defined Class
BEDPAN FRACTURE BEDPAN FRACTURE	41200185	EACH	78	
BEDPAN REGULAR BEDPAN REGULAR	41200330	EACH	64	
BEDPAN SMALL SMALL BEDPAN	3849382083902	EACH	0	
BELT SAFETY BELT SAFETY	1111111	EACH	0	
BERIATRIC ENVIROMENT BERIATRIC ENV	412	DAILY	21	
BLANKET HEATED BLANKET	3890482009238	EACH	0	SS Bulk
BOTTLED WATER WATER	34830283490	EACH	15	
CARDIZEM CARDIZEM	DILT50I	DILTIAZEM	10	Lowest
CART ISOLATION CART ISOLATION	R1543344	DAILY	47	
CATH BAG CLEANING SOLUTION CATH BAG CLEANING SOLUTION	41911497	BOTTLE	82	
CATH PLUG PLUG CATH	41000195	EA	0	
CATHETER EXTERNAL INTERMITENT CONDOM INTERMITTENT	36901570	EA	0	
COLLECTION SPECIPAN SPECIPAN	41908305	EA	40	

To view or edit the supply detail

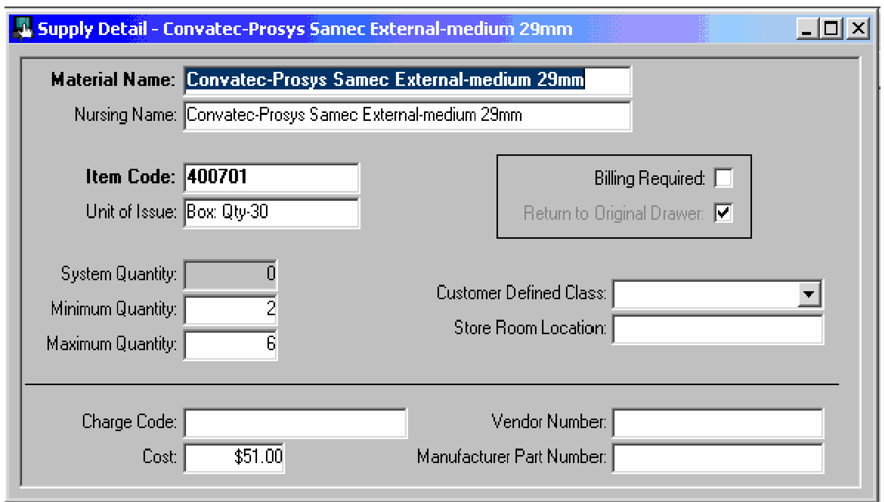
1. Under the **Management** menu, select **Supply**.

2. In the Supply Browser, touch the line showing the record you want to view.

3. Press the **Details** button to open the supply detail.

4. Edit the supply data as necessary.

5. Press the **Save** button .



To add a new supply

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

2. Press the **Add** button. A blank supply form will open.

   You can also add a supply from the Supply Details window by pressing the add button.

3. Enter the supply data.

4. Press the **Save** button.

5. When you are done, you can press on the **Close** button to return to the Supply Browser.

To delete a supply

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

2. Select the supply name from the browser list.

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

4. Press the **Delete** button.

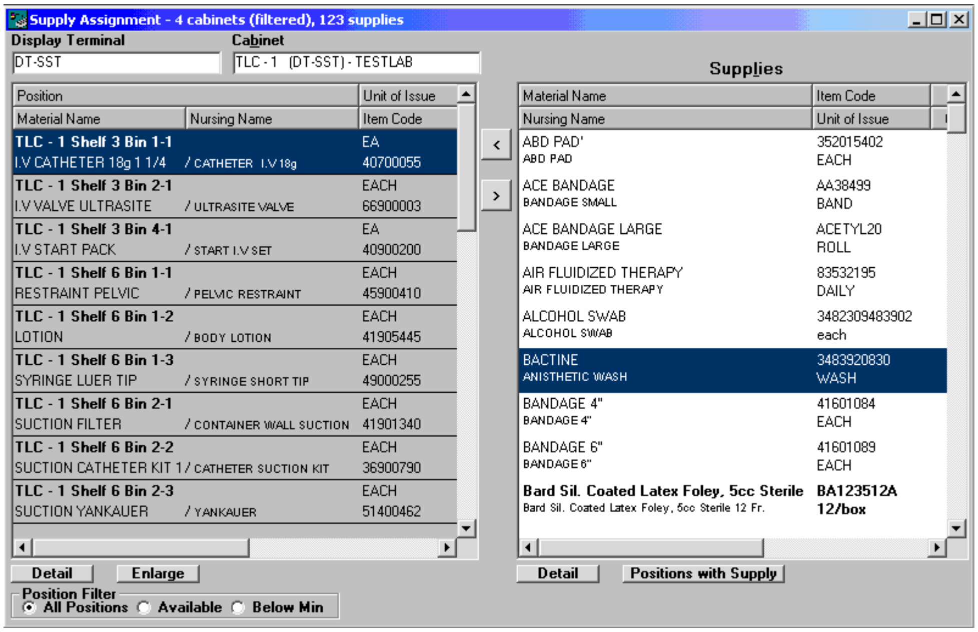
5. You will be asked to confirm the delete. Press the **Yes** button to confirm, or press the **No** button to cancel the delete. If you performed the delete from the Supply Browser, then the data will not be removed from the database until you press the **Save** button.

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, a message window will notify you.

Assigning Supplies to MedSelect Devices Using ConfigureIt

Supplies can be assigned to MedSelect positions by using Supply Assignment in ConfigureIt. 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.

Note: You must have the Inventory access right to assign supplies to MedSelect positions.



To assign a supply to a position

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

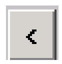
   Supply Assignment contains two browsers. The one on your right is a Supply Browser. The one on your left is a Cabinet Browser that shows all of the positions configured within the selected cabinet.

2. From the Display Terminal drop down list, select a DT.

3. From the **Cabinet** drop down list, select a cabinet.

4. Select a position from the Cabinet Browser.

You may have to scroll through the list of positions to locate the position you want.

5. From the Supply Browser, select the supply you want to assign to the position. Touch the arrow  pointing towards the cabinet position or pointing to the left. You can also drag and drop the supply into the Cabinet Browser by sliding your finger across the screen.

   Note if the position already contains a supply you will not be able to assign a new supply to that position until the old supply has been removed.

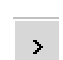
6. In the **Min** field, enter the minimum quantity of the supply that should be kept at this position. In the **Max** field, enter the maximum quantity of the supply that should be kept at this position.

   The **Quantity** field, which shows the actual quantity currently stocked, cannot be edited from this form.

   The **Audited** field, which shows the last time a position was audited, cannot be edited from this form.

7. Press the **Save**  button.

To edit a position's contents

1. Under the **Management** menu, select **Supply Assignment**.
2. From the **Display Terminal** drop down list, select a DT.
3. From the **Cabinet** drop down list, select the cabinet that contains positions you want to edit.
4. Select a position from the Cabinet Browser.
5. To change the Min or Max quantities, select either field, and then enter the new quantity.
6. To remove or "unassign" the assigned supply, touch the arrow  pointing away from the cabinet position or pointing to the right. You can also drag and drop the supply into the Supply Browser by sliding your finger across the screen.

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

7. Press the **Save** button.

Cabinet Configuration

Use Cabinet Configuration to add, modify, and delete the names of cabinets or defined storage areas that are included in the MedSelect System, including Supply Cabinets, External Lock Modules, Cath Towers, and Virtual storage areas.

To add a cabinet

1. Under the **Maintenance** menu, select **Configuration** then select **Cabinet.**
2. Press the **Add** button.
3. In the **Cabinet** field, enter a description for the cabinet, 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. Press the **Save** button.

To delete a cabinet

When you delete a cabinet, all associated controllers and positions are also deleted. However, you cannot delete a cabinet if there are supplies assigned to its positions. Unassign all supplies before deleting.

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

2. Select the cabinet you want to delete.

3. Press the **Delete** button.

   You will be asked to confirm the delete. Press **Yes** to confirm, or press **No** to cancel.

4. Press the **Save** button.

To replace a cabinet, you must first delete the unwanted cabinet, and then add the new cabinet.

Controller Configuration

After adding a cabinet, you must assign the controllers contained within the cabinet in order to restock or dispense from them. Depending on what type of cabinet you are trying to configure, the first two letters of the address will be different. See the chart that follows:

You must have Configuration rights to create and maintain controllers.

OC	**SST Electronic Lock**
FF	**Econ Rail, SST Shelf (Economy Shelf), or Virtual Storage**
0B	**Electronic Lock**
OD	**SST Shelf**
OE	**SST Cath Rail**

Creating a Controller for an SST Lock

Do the following to set up a tower lock controller. You only have to create **one** Lock Controller for each SupplySource Tower:

1. Under the **Maintenance** menu, select **Configuration**, and then select **Controller**. You can also press the Configuration button in the Cabinet Configuration window.

2. From the Display Terminal drop down list, select the DT you want to configure.

3. From the Cabinet drop down list, select a cabinet.

4. Press the **Add** button.

5. 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).

   Seq Num 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 must be 1 and is filled in automatically.

   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. For example:

   - 1-1-1-1 = Door 1, Door 2, Door 3, Door 4
   - 1-2-1 = Door 1, Door 2, Door 4
   - 2-2 = Door 1, Door 3
   - 3-1 = Door 1, Door 4

6. Press the **Save** button.

Creating a Controller for an SST Electronic Lock

Controller configuration for an Electronic Lock is very similar to an SST Lock. To add a controller of this type, use SST Lock Controller Configuration but observe the following differences:

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

2. Press the **Config** button; an Electronic Lock Controller Configuration window opens

   This window indicates which ports on the controller card are used. There are eight ports, which correspond to the eight choices in this window. When you click on the button to select a connector, the module number (for instance, Module 7) is displayed. Select each port that has a dispensing device connected to it.

   In place of the module number, type a description of the cabinet or device that is attached to that port. Examples of useful descriptions are "OR Supply Cabinet 3" or "ER Refrigerator 1".

3. Press the **OK** button and the sequence number and configuration are filled in automatically.

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:

Note you cannot create an SST Shelf without first creating an (OC) SST Lock.

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

2. The **Seq Num** 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.

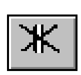
3. When configuring a shelf controller, the **Controller Configuration-Tower Shelf or Bin** will appear after you have specified the Sequence Number of that shelf and press the **Config** button. This dialog is used to configure the shelf.

   When the 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. Choose the **Shelf Type** as **Pull Out**

   The shelf will be defaulted to the maximum number of positions (18).

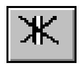
2. Touch the  button to remove shelf dividers. Note that the shelf indicator buttons on the Button Bar will change accordingly in the dialog.

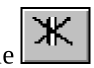
   To put a divider back, touch the  button.

3. Press **OK**.

To Configure a "Fixed" Shelf

1. In the 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 in the dialog will change accordingly.

3. Press **OK**.

Creating a Controller for an SST Cath Rail

Note you cannot create an SST Cath Rail without first creating an (OC) SST Lock.

Do the following to set up a cath rail controller:

1. Under the **Maintenance** menu, select **Configuration**, and then select **Controller**. You can also press the Configuration button in the Cabinet Configuration window.

2. From the Display Terminal drop down list, select the DT you want to configure.

3. From the Cabinet drop down list, select a cabinet.

4. Press the **Add** button.

5. Enter the following data:

   Address is the number assigned to the processor chip on the controller (SST Cath Rail controller names begin with 0E—zero E).

   The **Seq Num** 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.

   Configuration is the number of positions created for the Cath Rails attached to the controller. There are only 12 positions created.

   Rail Seq is the Rail Sequence Number used to determine the cath rail's unique rail number within the tower. This will be used for cath rails and economy rails. You cannot mix cath rails and economy rails within the same tower. The Rail Sequence Number must be between 1 and 99 and no other 0E or FF controller can have the same Rail Sequence Number within the cabinet.

6. Press the **Save** button.

Using the Address Listener to *add* an Address

The Address Listener is an option for automatically detecting an OD or OE controller when adding an SST shelf. Do the following to add a controller address using the Address Listener:

1. Under the **Maintenance** menu, select **Configuration**, and then select **Controller**. You can also press the Controller button in the Cabinet Configuration window.
2. From the **Display Terminal** drop down list, select a DT.
3. From the **Cabinet** drop down list, select the cabinet that contains positions you want to edit.
4. Press the **Add**  button.
5. Press the **Address Listener** button.
6. From inside the tower press the position button and quantity for the address you wish to locate.

   When located, the address will appear in the Address Listener dialog box under Controller Address.
7. Press **OK** to return to the Controller Configuration window.

Using the Address Listener to *verify* an Address

The Address Listener can also be used to verify that an address is correct or that the right supply is assigned to the correct controller. Do the following to verify a controller address using Address Listener:

1. Under the **Maintenance** menu, select **Configuration**, and then select **Controller**. You can also press the Controller button in the Cabinet Configuration window.
2. From the **Display Terminal** drop down list, select a DT.
3. From the **Cabinet** drop down list, select the cabinet that contains positions you want to edit.
4. Press the **Modify Controller** button.
5. Press the **Address Listener** button.

6. Open the cabinet of the shelf you want to verify or change and press any position button and any quantity button.

   When located, the address will appear in the Address Listener dialog box under Controller Address. Verify that the address is correct or you can choose to change the address by giving it a new address.

7. Press **OK** to accept the address or press **Cancel** to return to the Controller Configuration-Modify Controller window.

8. Press **OK** to save any changes and return to the Controller Configuration window.

Creating Controllers in a Virtual Storage Area

If you want to divide a virtual storage area into separate shelves, then each shelf must have its own virtual controller. Separate shelves allow you to store and track a different supply on each shelf. To create virtual controllers, follow these steps:

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

2. From the **Display Terminal** drop down list, select a DT.

3. From the **Cabinet** drop down list, select the cabinet that contains positions you want to edit.

4. Press the **Add** button .

5. Enter the following data:

   - **Address** must begin with FF.

   - **Seq Num** is the number that describes the *physical order* of virtual controllers when there is more than one in the storage area. For example, suppose there are five shelves, and each shelf has its own virtual controller. You may want to assign a sequence number of 1 to the top virtual controller (top shelf), a sequence number of 2 to the next lowest virtual controller, and so on.

   - **Configuration** will be **Virtual** for a standard virtual storage shelf. Select it from the drop down menu.

6. Press the Save button **.**

Adding and Deleting Positions in a Virtual Storage Area

By default, all Virtual Storage shelves contain only one position. However, you can create as many positions as needed on a Virtual Storage shelf.

To add positions to a virtual storage area

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

2. From the **Display Terminal** drop down list, select the DT that will support the new shelf.

3. From the **Cabinets** drop down list, select the virtual storage area that includes the shelf you want to divide.

4. Click on the **Positions** button. The Controller Configuration Virtual Positions Window will open.

5. All existing shelves supported by that controller are displayed. Virtual Shelves will be on the left. Shelf positions will be on the right.

6. Click on the **Auto Generate, Add** or **Insert** button to add positions

   If the **Auto Generate** button is not available, then you have already created positions for this shelf. To auto generate positions again, you must first delete all existing positions except for position 1.

7. For Auto Generate, enter the number of positions you want to generate (for example, enter **50** if you want to create fifty positions inside the module), and then click on the **OK** button.

   Wait while the positions are generated.

8. For Add or Insert, only one position will be created at a time.

9. Click on the **OK** button to save your changes.

To delete positions from a virtual storage area

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

2. From the **Display Terminal** drop down list, select the DT that will support the new cabinet.

3. From the **Cabinet** drop down list, select the virtual storage area that includes the position you want to delete.

4. Click on the **Positions** button. The Controller Configuration Virtual Positions Window will open.

5. Click on the **Delete** button to delete the selected position Under **Positions**, select the position you want to delete.

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

6. Click on the **OK** button.

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

Deleting a Controller

Deleting a controller will cause 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 cabinet, it may be quicker to delete the entire cabinet, which will also delete all of its associated controllers. To delete a cabinet, see Cabinet Configuration. To delete individual controllers without deleting the cabinet, do the following:

1. Under the **Maintenance** menu, select **Configuration,** and then select **Controller**. You can also press the Configuration button in the Cabinet Configuration window.

2. Select the controller you want to delete.

3. Press the **Delete** button.

   You will be asked to confirm the delete. Press the **Yes** button to confirm, or press the **No** button to cancel.

4. Press the **Save** button.

To protect the integrity of the database, you may not be allowed to delete a controller if the controller information is being used elsewhere in the system or otherwise meets a condition that prevents the deletion. If such a condition exists, a message window will notify you.

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 with a different type, you must first delete the unwanted controller, and then add the new controller.

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

3. If you want to change a controller's configuration, you must unassign all supplies for that controller.

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. Select **Modify Controller** and the Controller Configuration- Modify Controller window will open.

4. Change the data to match the new controller.

   If the controller has supplies assigned to it, then you will only be 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.

5. Press the **OK** button.

Economy Tower Lock Configuration

The Economy Tower Lock is used to configure the positions on the Economy model of SupplySource towers. The Economy model does not have Button Bars on each shelf. When configuring a tower, the lock controller must be defined first.

To add a controller of this type do the following:

1. Under the **Maintenance** menu, select **Configuration**, and then select **Controller**. You can also press the Configuration button in the Cabinet Configuration window.

2. From the Display Terminal drop down list, select the DT you want to configure.

3. From the Cabinet drop down list, select a cabinet.

4. Press the **Add** button.

5. Enter the following data:

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

   The **Seq Num** is filled in automatically; tab through this field to skip to the Controller Configuration field.

   In the **Configuration** field, a drop down menu appears giving you options for doors. The door name/number for doors that are not joined will be directly related to the position of the door from 1 to 4, the top door being Door 1. The door name/number for doors that are joined will be directly related to the position of the top door of the joined set of doors. For example:

   - 1-1-1-1 = Door 1, Door 2, Door 3, Door 4
   - 1-2-1 = Door 1, Door 2, Door 4
   - 2-2 = Door 1, Door 3
   - 3-1 = Door 1, Door 4

Economy Tower Shelf Configuration

Controller configuration for an Economy Shelf requires that you specify the shelf number and the way the shelf is divided. To add controllers of this type do the following:

Note you cannot create an Economy Shelf without first creating an (OC) SST Lock.

1. Under the **Maintenance** menu, select **Configuration**, and then select **Controller**. You can also press the Configuration button in the Cabinet Configuration window.

2. From the Display Terminal drop down list, select the DT you want to configure.

3. From the Cabinet drop down list, select a cabinet.

4. Press the **Add** button.

5. Enter the following data:

   Address is the number assigned to the processor chip on the controller (SST Shelf controller names begin with FF).

   The **Seq Num** 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.

   The **Configuration** should be SSTShelf.

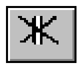
   When configuring a shelf controller, the **Controller Configuration-Tower Shelf or Bin** will appear after you press the **Config** button. This dialog is used to configure the shelf.

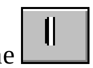
   When the dialog opens, it defaults to the maximum number of shelf positions (18) and a "Pull Out" shelf type.

To Configure a "Pull Out" Shelf

1. Choose the Shelf Type as Pull Out

   The shelf will be defaulted to the maximum number of positions (18).

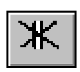
2. Touch the  button to remove shelf dividers. Note that the shelf indicator buttons on the Button Bar will change accordingly in the dialog.

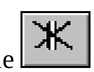
   To put a divider back, touch the  button.

3. Press **OK**.

To Configure a "Fixed" Shelf

1. In the 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 in the dialog will change accordingly.

3. Press **OK**.

Economy Tower Rail Configuration

You can also assign Economy Rail Controllers to Economy Towers. To add controllers of this type do the following:

1. Under the **Maintenance** menu, select **Configuration**, and then select **Controller**. You can also press the Configuration button in the Cabinet Configuration window.

2. From the Display Terminal drop down list, select the DT you want to configure.

3. From the Cabinet drop down list, select a cabinet.

4. Press the **Add** button.

5. Enter the following data:

   Address is the number assigned to the processor chip on the controller (Econ Rail controller names begin with FF).

   The **Seq Num** 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.

   The **Configuration** field defaults to Econ Rail (the type of position you are creating).

   Rail Seq is the Rail Sequence Number used to determine the rail assembly's unique rail number within the tower. This will be used for cath rails and economy rails. The Rail Sequence Number must be between 1 and 99 and no other 0E or FF controller can have the same Rail Sequence Number within the cabinet.

6. Press the **Save** button.

Auditing

The Audit function can be used to verify supply position counts and automatically create discrepancies for positions whose counts are incorrect. The Audit button can be accessed via the Patient Browser if the user has DT login rights or via the Inventory Menu if they do not have DT login rights. Auditing will also be available when the DT is offline.

You must have Audit Access rights in order to use the audit function.

For a User with DT Login rights *and* Audit Access rights

1. Type your User ID, then press the **Enter** button. The ID numbers are represented by asterisks (*).

   You can also scan your user barcode.

   If the Display Terminal is equipped with a card reader, you can enter your login ID by swiping your card through the reader.

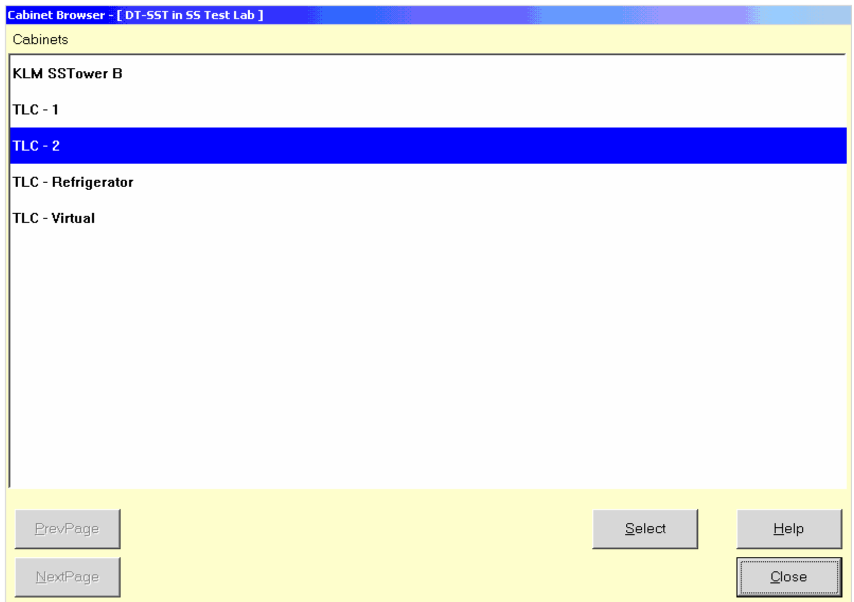
   (If there is a place to enter a PIN number on the Login screen, enter your PIN before pressing the **Enter** button.)

2. When you have logged in successfully, the Patient Browser opens. From the Patient Browser window select the **Audit** button.

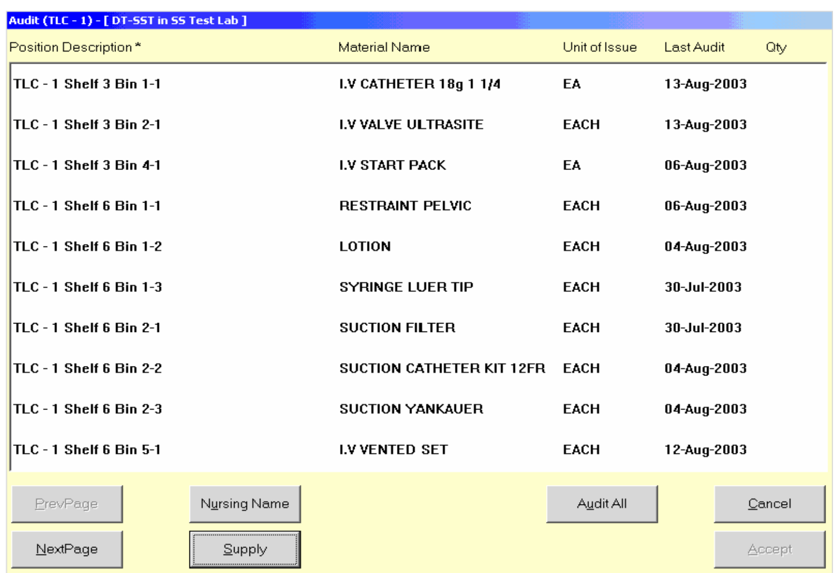
   If a Witness is required, the **Witness Login for Audit** window will open. Have the witness **Scan** their **User ID** and enter their **User PIN** (if applicable) then press the **Enter** button.

   To log in as a witness, you must have Audit Witness access rights. The witness cannot be the same person who is auditing.

3. Once you are logged in, the Cabinet Browser will open. Find the cabinet you want to audit and press the **Select** button.



4. The Audit Browser will open with a list of all the supplies for the currently selected cabinet. This window will open all the cabinet doors for the selected cabinet.

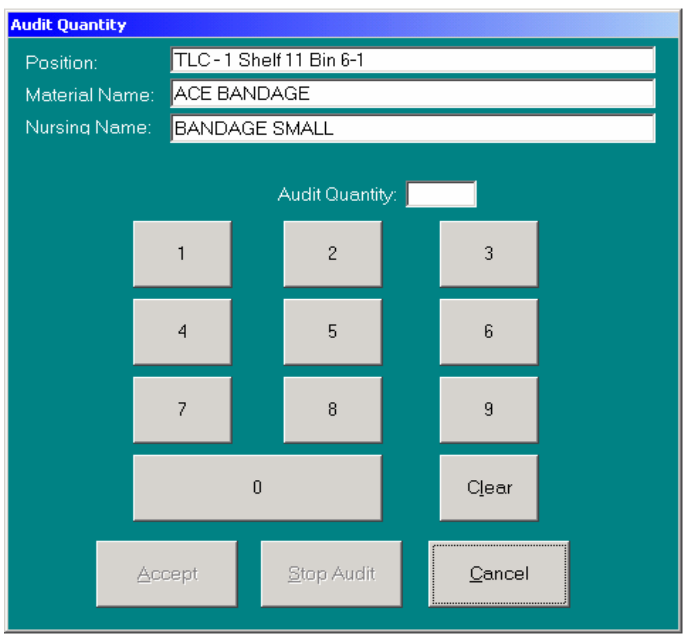


The list can be sorted by either the Supply Position description or Supply Name. The default sort on entering the Audit Browser will be the Supply Position description. The supply name displayed can be toggled between the Nursing and Material Name.

5. Select the position you want to Audit and the Audit Quantity window will open. A supply position can be selected by one of the following ways:

   - Selecting the position via the touch screen.
   - Pressing the shelf button on a standard cabinet.
   - Scanning a supply barcode.
   - Scanning a position barcode.

6. Use the keypad or shelf buttons to enter the quantity. Press the **Accept** button to save the changes or the **Cancel** button to return to the Audit Browser.



You may also select the **Audit All** button either in the Audit Quantity window or on the Audit Browser if you wish to audit all the positions in the cabinet. To cancel the audit hit the **Stop Audit** button in the Audit Quantity window.

After a position is audited, if the quantity does not match the supply position quantity then a "**!**" will be shown in the Discrepancy Indicator column.

7. Press the **Accept** button in the Audit Browser to save all audits.

   Note that no changes will be saved to the database until you hit the **Accept** button in the Audit Browser window.

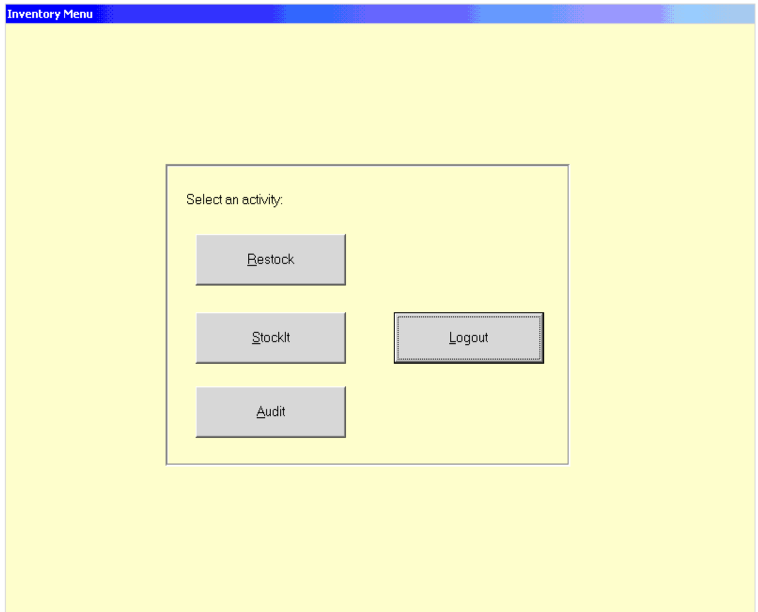
For a User with *no* DT Login rights but *with* Audit Access and Restock rights

1. Type your User ID, then press the **Enter** button. The ID numbers are represented by asterisks (*).

   If the Display Terminal is equipped with a card reader, you can enter your login ID by swiping your card through the reader.

   (If there is a place to enter a PIN number on the Login screen, enter your PIN before pressing the **Enter** button.)

2. When you have logged in successfully, the **Inventory Menu** will open. This screen will be yellow and will contain inventory function buttons such as Restock, Stock-It, Audit and a Logout button. From the Inventory Menu screen, select the **Audit** button.



If a Witness is required, the **Witness Login for Audit** window will open. Have the witness **Scan** their **User ID** and enter their **User PIN** (if applicable) then press the **Enter** button.

To log in as a witness, you must have Audit Witness access rights. The witness cannot be the same person who is auditing.

3. The Cabinet Browser will open. Find the cabinet you want to audit and press the **Select** button.

4. The Audit Browser will open and will list all the supplies for the currently selected cabinet. This window will open all the cabinet doors for the selected cabinet.

   The list can be sorted by either the Supply Position description or Supply Name. The default sort on entering the Audit Browser will be the Supply Position description. The supply name displayed can be toggled between the Nursing and Material Name.

5. Select the position you want to Audit and the Audit Quantity window will open.

6. Use the keypad or shelf quantity buttons to enter the Audit quantity. Press the **Accept** button to save the changes or the **Cancel** button to return to the Audit Browser.

   You may also select the **Audit All** button either in the Audit Quantity window or on the Audit Browser if you wish to audit all the positions in the cabinet. To cancel the audit hit the **Stop Audit** button in the Audit Quantity window.

   After a position is audited, if the quantity does not match the supply position quantity then a "**!**" will be shown in the Discrepancy Indicator column.

7. Press the **Accept** button in the Audit Browser to save all audits.

   A user with Audit Access rights only will be taken directly to the Audit Cabinet Browser.

   Note that no changes will be saved to the database until you hit the **Accept** button in the Audit Browser window.

Data Entry Fields

This section lists the ConfigureIt functions (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	A name that describes this cabinet, such as Cabinet 1 or East Wall Cabinet. Every cabinet must have a unique description.
Location	The location of the cabinet. Choose the location from the drop-down list. This should typically be the location of the display terminal, which can be seen within Control Center's Client Configuration function.

Controller Configuration Fields

Display Terminal	The node name assigned to the Display Terminal that power this Controller. Choose the Display Terminal from the drop-down list. Display terminals are maintained within Control Center's Client Configuration function.
Cabinet	Identifies the cabinet that contains this Controller. Choose the description from the drop-down list. Cabinets are maintained within the Control Center's Client Configuration function.
Address	The number assigned to the processor chip on the Controller (enter **FF** if this is a virtual storage area. The rest of the virtual address is created automatically). Maximum of 8 characters.
Seq Num	The number that describes the *physical order* of controllers when there is more than one in a cabinet. For example, a Drawer Module has 5 controllers; the top controller has a sequence number of 1, the next lowest has a sequence number of 2, and the bottom controller has a sequence number of 5.
Configuration	A unique identifier that describes the configuration of the dispensing devices attached to the controller. Choose the configuration from the drop-down list.
Rail Seq	The number that describes the cath rails unique rail number within the tower. The Rail Sequence Number must be between 1 and 99 and no other 0E or FF controller can have the same Rail Sequence Number within the cabinet.

Supply Assignment Fields

Min	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.
Max	The maximum quantity of this supply that you want to keep stocked at this position. Maximum quantities prevent over-stocking.

Supply Detail Fields

Material Name	The manufacturer's proprietary, US trademarked name for a drug or supply. You are not required to enter a trade name, but if no trade name is entered, then the generic name is copied and used. Maximum of 50 characters.
Nursing Name	The general, chemical, or non-brand specific name for a drug or supply. Maximum of 50 characters.
Item Code	A unique number assigned by your facility to identify a supply. For medications, this should be the formulary number. Maximum of 15 characters.
Unit of Issue	The form of the substance, such as capsule or tablet. Maximum of 20 characters.
System Quantity	The actual quantity of the supply currently stocked on the MedSelect System.
Minimum Quantity	The minimum *system-wide* quantity of this supply that your facility wants to keep stocked on the MedSelect System. 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 on the MedSelect System. 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	If checked, indicates that the user may return this supply to the drawer from which it was originally taken. Otherwise, the supply can only be returned to a special return drawer.
Customer Defined Class	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.
Store Room Location	The supply's location within the Pharmacy.

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.
Manufacturer Part Number	A number assigned to the part to identify it.

SmartStock

SmartStock is an optional inventory-restocking package to be used with your MedSelect Medication Dispensing System. SmartStock uses industry, existing barcodes to increase the accuracy and efficiency of the restocking process. Barcode technology at the DT verifies that the correct medication is being stocked in the correct position. SmartStock includes an omni directional laser barcode scanner, usually mounted to your DT and is used to perform the following functions:

- Login using existing user barcode ID's
- Restock items
- Register existing manufacturer barcodes

Using the Barcode Scanner

How to Scan

To scan a barcode, place the barcode under the scanner, about 2 to 3 inches (5 to 7.5 centimeters) from the scanner. The scanner will emit one short, high-pitched tone to indicate a successful scan. If the scanner cannot read the barcode, no tone will sound.

To Login using your Barcode Scanner

1. **Scan** your user barcode. This may be a pre-existing barcode on your facility badge or ID. If you choose to you can login manually. The ID numbers are represented by asterisks (*).

2. Type in your **PIN** (if applicable). The PIN numbers are represented by asterisks (*).

3. Press the **Enter** button. You are now logged into the SupplySource system.

To Restock at the DT using the Barcode Scanner

Note: You must have Restock rights to restock at the DT.

1. Login to the DT either manually or with the scanner. If you only have the Restock access right but not the DT login right, the Restock screen will display immediately following login.

2. If you have Restock and Audit access rights, the Inventory menu will display.

3. If a Witness is required, the **Witness Login for Restockers** window will open. Have the witness **Scan** their **User ID** and enter their **User PIN** then press the **Enter** button.

4. If you login and the Patient Browser or Inventory menu is displayed, press the **Restock** Button.

5. **Scan** the barcode on the supply you wish to restock and the correct position to restock will open. The **Stock Amount** window will display and the position light will blink if you are using a SupplySource Tower with a button bar.

6. If a supply scanned is stocked in more than one position, the **Restock Position Selection** window will display which allows the user to select which position to open. Touch the position you want to open and press the **Select** button.

7. Restock the supply.

To register barcodes at the DT

Note: You must have Barcode Registration rights to register supplies at the DT

1. Login to the DT either manually or with the scanner.

2. If the Patient Browser or Inventory menu is displayed press the **Restock** button.

3. If a Witness is required, the **Witness Login for Restockers** window will open. Have the witness **Scan** their **User ID** and enter their **User PIN** (if required), then press the **Enter** button. They may also login manually.

4. **Scan** the barcode of the supply you wish to register. You will get a message asking if you'd like to register the supply. Press **YES** if you want to register the supply. Press **NO** if you do not want to register the supply.

   If you are not asked if you want to register, you do not have Barcode Registration rights.

5. If you select **YES**, the **Barcode Registration** window will open and the supplies currently stocked at the DT will be displayed. Choose the correct supply from the list. Press the **Select** button and the position will open. The **Stock Amount** window will display. You can restock the item if you choose to or press **Close** to close the window.

   The barcode is now registered at the DT. The next time you scan the barcode it will be recognized at your DT.

Limited Offline Operation

If the SupplySource database server becomes unavailable, the Display Terminal continues to operate in a limited capacity. If this situation occurs, the Display Terminal warns you that the database server is unavailable, and that offline operation is now in effect. The Display Terminal also notifies you when the database server is again online.

During offline operation, the Display Terminal cannot be rebooted. If it is rebooted, it will not become operable until the database server is available.

The following rules apply to offline operation:

1. The Display Terminal only attempts to reconnect to the database server when no user is logged in. If you log in during offline operation, the Display Terminal cannot reconnect to the database server at least until you log out. All actions you perform are limited to offline operation.

2. The title bar color of all windows changes to red.

3. Only patient information that is required for supply dispensing is available. Complete patient information is only available when the database server is online.

4. Patients can be added at a Display Terminal during offline operation. You can only find patients within the Department belonging to the Display Terminal where you are working. A find does not locate patients in another Department while the Display Terminal is offline.

5. Supplies returned in off-line mode will not be associated with patients. This can be adjusted at the Control Center.

6. Restocking functionality is available during offline operation using the Restock function. The StockIt function is not available during offline operation.

7. Audit functionality will be available.

Using Keys to Open SupplySource Towers

You may need to open locked cabinets with a key during a complete power outage or other emergency.

You should work with your system administrator to develop a plan for manually recording supply usage during power emergencies.

To open a SupplySource Tower

1. Place the key into the lock.

2. Turn the key counter-clockwise one-quarter turn.

   The key stays in the lock without falling out.

3. Open the door. The cabinet door remains unlocked until the key is removed.

Troubleshooting Tips

There is not usually a need to power off the system database server, except for servicing by authorized MedSelect service personnel. If the database server is powered off, the Display Terminals 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 an IB Module is unplugged or powered off, dispensing from the Display Terminal is not possible. The IB Module is a small box connected by a cable to the Display Terminal.

If you are having problems differentiating colors on your screen you may need to check the brightness of your monitor.

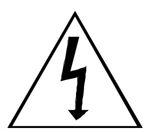
Care of the System

Do not use solvents or liquid cleaners to clean any part of the MedSelect System. Use a soft, slightly damp cloth and warm, soapy water for cleaning cabinet surfaces; use a pressurized duster or mini vacuum for keyboards; use a soft cloth and a small amount of water to clean the Display Terminal’s touch screen.

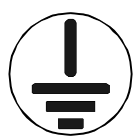
Safety Precautions

SupplySource 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 SupplySource.

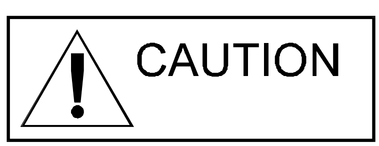


The lightning bolt inside a triangle indicates hazardous voltage inside. Do not attempt to open or access the interior of a device marked with this symbol.



This symbol indicates a protective conductor terminal that is earth grounded.

The Warning label denotes a hazard. It calls attention to an operating 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.

System users should not open equipment marked with the label pictured below. Otherwise, system damage may occur.

Contact your MedSelect Service Representative for system service. There are no user serviceable parts in the MedSelect System. Equipment used in a manner not specified in this document by MedSelect 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 HUB/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.

Depending on the model of the Display Terminal installed at the site, the power requirements are as listed in the table below. Consult MedSelect if you are unsure of your Display Terminal model.

Device	Nominal Input Power	Max AC Current (A)
DT 1.0	115VAC, 60Hz, single phase	1.2
Printer (Epson)	115VAC, 60Hz, single phase	1.3
IB Module	115VAC, 60Hz, single phase	2.6
DT-PC 1.5	115VAC, 60Hz, single phase	5 (HPVL7) 5 (HPVL8) 6 (HPVLi8)
DT-UI 1.5	115VAC, 60Hz, single phase	1.2
DT 2.0	115VAC, 60Hz, single phase	6 (HPVLi8) 4 (HPVL400) 5 (HPVL420)
DT2.5	115VAC, 60Hz, single phase	1.5

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.

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.

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.

Touchscreen Calibration

There are times when you may need to re-calibrate your touchscreen. For instance, if the cursor is not properly in line with the touch of your finger it can cause problems when trying to select items on the screen. You can re-calibrate the touchscreen to allow a more precise touch response. Before you can calibrate your screen it must be enabled.

There are three possible touchscreens

1. ELO Touch**-** (elo) 12.1**-**inch diagonal view screen with controls located on the *bottom*.
2. DYNAPRO**-** (dyna) 10.2**-**inch diagonal view screen with controls located on the *left*.
3. Microtouch**-** (mt) 10.2**-**inch diagonal view screen with *raised* controls located on the *left*.

Enabling

First you must inspect the screen to determine which of the above types you are using. Once you have determined the touchscreen you are using, you can enable the screen by doing the following.

To enable the touchscreen

1. Make sure the screen is connected to the COMB/2 connector at the rear of the PC. DO NOT use the four port “PIGTAIL” if one is present (on older VL400 HP models only).
2. Turn on the PC.
3. At the desktop press <**CTRL-ESC**> to bring up the start menu.
4. Press ‘**R’** to open the run window.
5. For the DYNAPRO touchscreen type ‘**dyna**’ (no quotes) then <**ENTER**> 3 times.
6. For the Microtouch touchscreen type ‘**mt**’ then <**ENTER**> 3 times.
7. For the ELO touchscreen type ‘**elo**’ then <**ENTER**> 3 times.
8. Restart the machine.

   With the PC rebooted the touchscreen should be active. If your touchscreen is not active see *Disabling the Wrong Driver on page 105.*

Calibrating
You are now ready to calibrate the screen from the touchscreen utility locations. Depending on which touchscreen you are using, choose one of the following methods.

To calibrate the touchscreen

ELO

1. Press <**CTRL-ESC**> to bring up the Start Menu.
2. Press <**S**> or scroll down using the arrow keys until you reach Settings
3. Press <**ENTER**> to select Control Panel
4. Use the arrow keys to select the ELO icon then press <**ENTER**>.
5. Press the **ALIGN** button.
6. Follow the instructions on the screen.
7. Press **OK** to exit the system.

DYNAPRO

1. Press <**CTRL-ESC**> to bring up the Start menu.
2. Press <**P**> or use the arrow keys until you reach Programs.
3. Use the <**DOWN-ARROW**> to select UPDD and then the <**RIGHT-ARROW**> to select Calibrate.
4. Press the **ENTER** key.
5. Follow the instructions on the screen.

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