



Examiner  
User's Guide

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For use with the MedSelect® Examiner Reporting System

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## **Chapter 1**

### **Getting Started with Examiner**



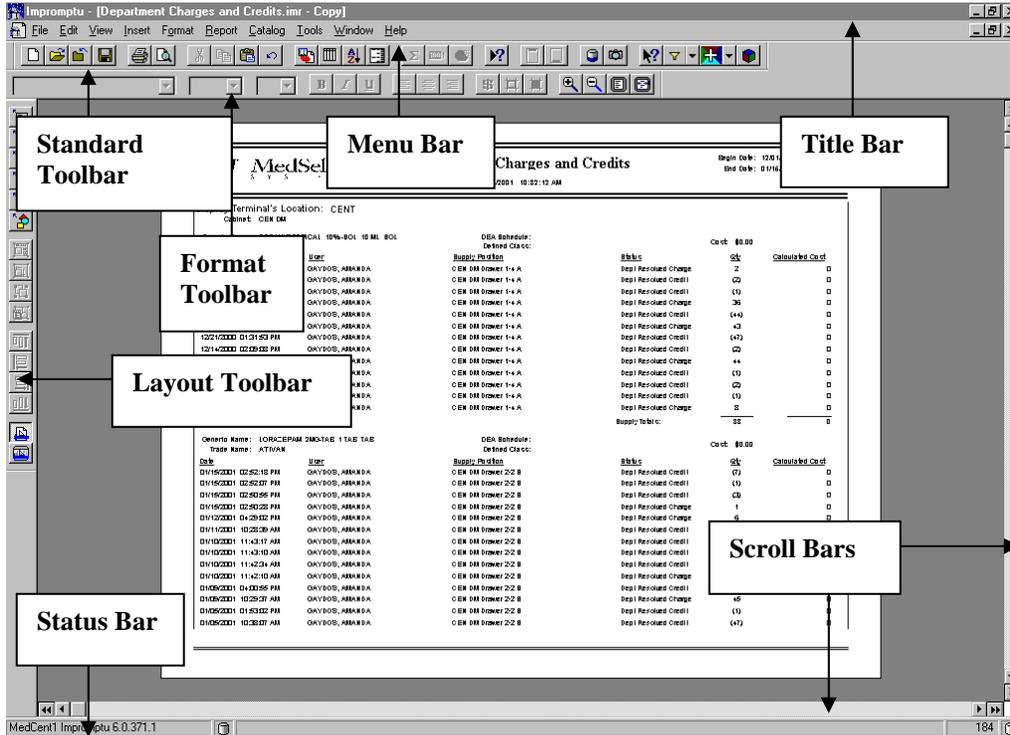
## **Introduction to Examiner**

Impromptu is the software application that is used to create, customize, and print MedSelect, Centrack, and SupplySource Examiner reports. Examiner includes a variety of standard reports that you can view and print without performing any customization (see page 10 for a list of these standard reports). The instructions that follow show you how to access and print these standard reports. There are also standard Auto-Reports that you can schedule to be run on a daily, weekly, or monthly basis.

Impromptu can also be used to create/modify existing standard reports, and to create custom reports. These subjects are also discussed in this book.

## The Impromptu User Interface

The Impromptu user interface has a Microsoft Windows look and feel. Online help is available from the **Help** menu, as well as by using the **Screen Help** button. Letting the cursor hover over any button will reveal the Tool Tip for that button, in addition to providing a longer explanation in the Status Bar.



**The Standard Toolbar**



New	Print	Cut	Data	Total	Prompt	Header	Thumbnail	Screen
Open	Print Preview	Copy	Query Data	Count		Footer	Snapshot	Help
Close		Paste	Sort Ascending	Rank				Filter
Save		Undo	Group					Drill Through
								Create Power Play Power Cube

**The Format Toolbar**



Font Attributes	Justify	Currency	Zoom In
		Borders	Zoom Out
		Pattern	Whole Page
			Page Width

### The Layout Toolbar



Form Frame	Select Parent	Align	Page Layout
Text Frame	Snap to Parent		Screen Layout
List Frame	Group Objects		
Picture Frame	Properties		
Chart Frame			
OLE Object			

## Getting Started with Examiner

Examiner reports are created and modified using a software application called Impromptu.



### Opening Impromptu

1. From the **Start** menu, choose **Programs**, then **MedSelect**, then **Examiner 6.0**. The Impromptu application will open.

If you have several MedSelect products on the same PC, you should browse for the catalog directory and open the desired catalog, select the correct **User Class** from the pull-down list and click on **OK**.



### Opening an Examiner report

1. From the **File** menu, choose **Open**. Choose the report you want from the appropriate folder. The list of available Standard Reports can be found in **Examiner Standard Reports** on page 10.
2. Click **Open**. (Or double-click on the report name.)

For some reports, you are prompted to enter a **Date Range** for the report information. The date and time convention used is YYYY-MM-DD (where Y=year, M=month, D=day); followed by the time as 00:00:00.000 (for hour, minute, second, and hundredth of a second). The time portion of the prompt may be left blank; it will default to midnight. Do not delete the dashes or spaces. The **Begin Date/Time** and **End Date/Time** will appear in the header of your report, as will the date and time the report was generated.

For some reports, you will be prompted to select display terminal locations, supplies, cabinet locations, etc. Click on the desired prompt(s). If you want to choose multiple prompts not in a series, click on each one while holding down the **CTRL** key. If you want to choose multiple prompts in a series, click on the first prompt, then click on the last prompt while holding down the **SHIFT** key.

3. Click **OK**.

**Note:** If your completed report lists events 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. You may want to generate the report again with a broader Date Range.

**Note:** If you would like to change the Date Range or any other report prompt while that report is open, from the **Report** menu, choose **Prompt** (or click the **Prompt** button).

---



### Printing an Examiner Report

To print the report that you are viewing, under the **File** menu, choose **Print**.



### Scheduling an Examiner Auto Reports

Auto Reports can be scheduled to print automatically on a daily, weekly, or monthly basis. The list of available Auto Reports is available in **Examiner Standard Reports** on page 10.

1. Under the **Tools** menu, select **Scheduler**.
2. On the Scheduler window, select the **Scheduled** index tab.
3. Under the **Insert** menu, select **Recurring task** if you want to schedule a report to print on a regular cycle, or **Task** if you only want to schedule the report to print once and only once.
4. On the Insert Task window, select the **Identification** index tab.
5. Click on the **Browse** button.
6. Browse to the path where the auto reports are stored.

This should be **c (or d):\program files\cognos\cer1\Rx Auto Reports**

*OR...*

**c (or d):\program files\cognos\cer1\SS+ Auto Reports**

7. In the **Files of type** field, select **All Files**.
8. Select the proper file name, then click on the **Open** button:
9. The path and file name is inserted into the **File name** field.
10. Enter a description.

An example of a description is **Midnight Below Minimum Report**.

---

11. Select the **Timetable** index tab.

12. Set the timetable options so that the report prints when you want it.

For a recurring task, you can specify daily, weekly, or monthly, the time when you want the report to print, and the Date Range.

For a single task, you can specify the date and time.

13. Select the **Results** index tab.

The results settings are used to indicate the output for this report. Select the **Print** option if you want this report to be printed, then select the printer and the number of copies.

If you want this report to be sent to a file, select the **File, Save As** option and then specify the path and filename.

14. Click on the **OK** button.

The report is now listed in the Scheduler window.

15. Minimize the Scheduler application, but **do not close Scheduler**.

Scheduler must be running for the report to print automatically. However, you can close the Impromptu application if you wish. If Impromptu is not running when it is time for the report to print, Scheduler automatically launches Impromptu then opens and prints the report.

## Examiner Standard Reports

### Rx (MedSelect) Reports

For updated descriptions of Rx Reports, please see the Readme file included with Examiner. To open the readme file, click on the **Start** button on the Windows Task Bar, select **Programs**, then select **MedSelect**, then select **Examiner Reference 6.0**, then **Rx Examiner Readme**.

### Rx Auto Reports

See page 8 for instructions on scheduling auto reports.

Below Minimum (Auto)	No Prompts. Lists all Supply Positions where the current quantity is below the minimum quantity. If the Nearest Expiration Date is past or if the Position is Failed, the fields will be Mellow Yellow 4. A failed Position will have '(F)' appended to the Supply Position Description.
Inventory Returns and Retrieves (Auto)	No Prompts. Corresponding Return and Retrieves will be grouped together. Retrieve Events that created a discrepancy will have '(D)' appended to the Status Description and the Status Description will be Mellow Yellow 4.
Out of Stock (Auto)	No Prompts. Lists all Supply Positions where the current quantity is zero. If the Nearest Expiration Date is past or if the Position is Failed, the fields will be Mellow Yellow 4. A failed Position will have '(F)' appended to the Supply Position Description.
Restock Cabinet (Auto)	No Prompts. Lists all Supply Positions and the Quantity needed to stock each position to its maximum. If the Nearest Expiration Date is past or if the Position is Failed, the fields will be Mellow Yellow 4. A failed Position will have '(F)' appended to the Supply Position Description.

Restock Summary (Auto)	No Prompts. List all Stocking events that have occurred. The Date Range uses the report criteria filed entered at the AWS in the Facility window. Discrepant events will be Mellow Yellow 4 and the Status Description will have '(D)' appended to it.
Return Drawer Contents (Auto)	No Prompts. Lists contents of all Return Drawers.
Yesterday's Usage (Auto)	No Prompts. Schedule this report any time after midnight to see all Usage events created from the previous day. Updated to include High Alert Med status. Sorted by User and Dispense Date. This report does not include the Taken events that have a corresponding 100% return, 100% waste, or events that were canceled. To view all events, delete the following from the filter: "and Event Dispense Group < > 0".
discrep.exe	<p>This report lists all <i>unresolved</i> discrepancies reported by the system (discrepancies are differences between the system count and a user's reported count for a particular position). For each discrepant position it also lists the users who recently had access to the position.</p> <p>When you generate this report, information is printed based on the most recent settings used on the Discrepancy Resolution window. These settings include following options:</p>

discrep.exe (cont.)

- Unresolved discrepancies are only shown for dates specified using the Date Range option. The report uses the last Date Range specified.
- The number of previous accesses shown is based on the last setting used for the previous accesses option. The report uses whatever number was last specified for the previous accesses.

*This report is not an Examiner Report and can run in Scheduler.*

### **Rx Billing**

Billing (Auto)

No Prompts. For 24 hour prior to run date list charges and credits against patients.

Billing

For a specified Date Range, lists changes and credits against patients

### **Rx Reports (Standard)**

All Events by Location

Prompts for Display Terminal Location and desired Date Range. Lists all events, sorted by Dispense Location and Supply Generic Name in ascending order and Event Date in descending order.

All Events by Supply

Prompts for Supply Generic Name and desired Date Range. Lists all events, sorted by Supply Generic Name in ascending order and Event Date in descending order. This could be helpful when resolving discrepancies. Includes audit and audit discrepancy events.

Audit Summary

Prompts for Display Terminal Locations and desired Date Range. Lists all system positions that have had inventory events, including audit, for the specified Date Range and selected Locations. Discrepant events will be Mellow Yellow 4 and the Status Description will have '(D)' appended to it.

Audit Summary - UDM Only	Prompts for Display Terminal Locations and desired Date Range. Lists all UDM positions that have had inventory events, including audit, for the specified Date Range and selected Locations. Discrepant events will be Mellow Yellow 4 and the Status Description will have '(D)' appended to it.
Available Positions	Prompts for Cabinet Locations. Lists existing positions that do not have supplies assigned to them.
Controlled Substance Archive	Prompts for desired Date Range. Renamed from the Controlled Substance Report. Lists all narcotic events back to three years. Updated to include audit and audit discrepancy status.
Controlled Substance Graph by Location	Prompts for desired Date Range, Dispensed Location and Supply Generic Name (DEA Schedules only). Dispensed Quantity Graph now in descending order. There is a current known problem when the Legend becomes too large. Impromptu 6.0.371.1 will give the following error, "IMPADMIN caused an invalid page fault in module COGPG32.DLL at 014f:005ab91d." You must reboot your machine and may attempt the report again with a smaller Date Range. A fix will be forwarded when available. This Report can NOT go back three years.
Controlled Substance Graph by Supply	Prompt for desired Date Range and Supply Generic Name (DEA Schedules only). Dispensed Quantity Graph is now in descending order. There is a current known problem when the Legend becomes too large. Impromptu 6.0.371.1 will give the following error, "IMPADMIN caused an invalid page fault in module COGPG32.DLL at 014f:005ab91d." You must reboot your machine and may attempt the report again with a smaller Date Range. A fix will be forwarded when available. This Report can NOT go back three years.

Database Supply Summary	No Prompts. List all Supplies available in the Database. Sorted by Supply Generic Name in ascending order.
Department Charges and Credits	Prompts for desired Date Range. Lists all medications and other supplies that were either charged or credited to a specific department because of an inventory discrepancy. Updated to include audit and audit discrepancy statuses. Sorted by Display Terminal Location, Cabinet Description and Supply Generic Name in ascending order.
Discrepancy Tracking by UDM Positions	Prompts for desired Date Range and DT Node Names. This report allows the user to look at discrepancies by UDM position, to help in evaluating why discrepancies occur. This report can be used to evaluate if discrepancies occur due to wrong size med in wrong size coil/bin or coil/bin misfire. Updated to include audit and audit discrepancy statuses.
Electronic Lock Cabinet Labels	Prompts for Cabinet Location. Prints labels for all Electronic Locks. (Supply Cabinet and ELC's)
Event Summary	Prompts for Display Terminal Locations. This report separates events into scheduled medications and non-scheduled medications. Calculates a total of each status per location and a grand total of all locations.
Event Tracking for Drawers, Doors & Locks	Cascading Prompts. First prompts for the DT's Node Name, then for the desired Date Range and Physical Position (Drawer, Door, or Lock) that are associated with the DT Name selected in the first prompt. Lists all events sorted in Ascending order by DT Name, Cabinet Name, Lock Position (Physical Position) and (if selected) Return Drawer first then Retrieve Drawer than the rest of the Positions. Use this report to view ALL USER access to a door or drawer with multiple supplies assigned, i.e. Supply Cabinets, Refrigerator Lock, etc.

Inventory Returns and Retrieves	Prompts for desired Date Range. Return events and their associated Retrieves will be grouped together. Retrieve events that created a discrepancy will have the '(D)' appended to the Status Description and the Status Description will be Mellow Yellow 4.
Inventory Summary	Prompts for Cabinet Locations. Lists all supplies actually stocked in the system, sorted by Location, then Cabinet. Nearest Expiration Date will be Mellow Yellow 4 if it is past.
Location Usage	Prompts for desired Date Range and Display Terminal Locations. Lists Usage events by Location. Events that created a discrepancy will have the '(D)' appended to the Status Description and the Status Description will be Mellow Yellow 4. REMEMBER - PRN's will not have a Prescribed Date.
Medication Expiration Date	Prompts for Cabinet Locations and Greatest Expiration Date. Lists all positions in the system that contain an expiration date that is less than the Greatest expiration date entered in the Prompt. Expiration Dates that are past will be Mellow Yellow 4. To filter on Supplies that do not have a Nearest Expiration Date, click on the blank area where the Nearest Expiration date should be and then click on the picture of the funnel on the tool bar.
Patient Detail	Prompts for Patient Visit's Created by AWS, Display Terminal or Interface. Sorted by Patient Last Name in ascending order.
Patient Usage	Prompts for Patient ID Number, then desired Date Range and Patient Visits. Updated to include High Alert Med status. To filter on events that were not dispensed via the MedOrder Screen, click on the blank area where the MedOrder # should be and then click on the picture of the funnel on the tool bar. REMEMBER - PRN's will not have a Prescribed Date.

Physician Usage	Prompts for desired Date Range and Physician Names. List all usage events dispensed via a MedOrder and all usage events with an associated physician from the Picklist. Updated to include High Alert Med status. REMEMBER - PRN's will not have a Prescribed Date.
Random Staff Usage of Controlled Substances	Cascading Prompts. You are first prompted for the DT Name's and then the # of Days to Retrieve a Staff List (This will shorten your Staff Usage Picklist to only those who have created events in the # of Days entered for DT's selected). The second prompt has your filtered Staff Name list and also prompts for the # of Days from today for the Staff Usage (will include ALL usage regardless of the DT's selected in the first prompt). Displays the Dose Ordered for MedOrders. Updated to include High Alert Med status.
Restock Cabinet	Prompts for Cabinet Locations. Lists ALL positions in the system, and the quantity of the supply that must be added to restore the position to its maximum. If the Current Quantity is Below Minimum, or the Nearest Expiration Date is past or if the Position is Failed, the fields will be Mellow Yellow 4. A failed Position will have '(F)' appended to the Supply Position Description.
Restock Selection	No Prompts. Lists all counted positions that need to be restocked, sorted by pharmacy location in ascending order.
Restock Summary	Prompts for Display Terminal Locations and desired Date Range. Lists all system positions that have been restocked for the specified Date Range and selected Locations. Discrepant events will be Mellow Yellow 4 and the Status Description will have '(D)' appended to it.

Staff Access Rights by Dept.	Prompts for Desired Department. Lists users and their access right by the selected Department. Warning: If all users are assigned to all departments, this report will be very large.
Staff Access Rights	Prompts for desired Staff Names. Lists all system users and their assigned access rights.
Staff Usage	Prompts for desired Date Range and Staff Names. Lists all selected users and the supplies associated with non-stocking events. This report also includes Centrack events. Updated to include High Alert Med status. Discrepant events will be Mellow Yellow 4 and the Status Description will have '(D)' appended to it. To filter on events that were not dispensed via the MedOrder Screen, click on the blank area where the MedOrder # should be and then click on the picture of the funnel on the tool bar. REMEMBER - PRN's will not have a Prescribed Date.
Supply Usage	Prompts for desired Date Range and Supply by Generic Name. List all dispenses for selected supplies from within Date Range. Updated to include High Alert Med status. Sorted by Supply Generic Name in ascending order and Event Date in descending order. Each event has a supply cost and there is a Total Cost per Supply. REMEMBER - PRN's will not have a Prescribed Date.
System Configuration	Prompts for Cabinet Location. Shows detailed configuration of your MedSelect system. Useful during initial Setup.
System Log Messages	Prompts for desired Date Range. Sorted by Application and Event Date in ascending order
System Position Labels	Prompts for Cabinet Locations. Sorted by Cabinet Location, Cabinet Description, and Position Description in ascending order.

Unexpected Hardware Activity	Prompts for desired Date Range and Display Terminal Locations. Lists intrusion alerts, position description, user (if exists), and date of occurrence, grouped by DT.
Velocity Report by Location	Prompts for desired Date Range and Display Terminal Locations. A position will appear more than once if it has had a new supply assigned to it.
Velocity Report by Supply	Prompts for desired Date Range and Supply Generic Name. Lists all supplies that have been dispensed during the selected Date Range. Computes the Average, Minimum and Maximum Quantity Dispensed per Event and the Total number of Supplies and Total Number of Events per Supply.
Wasted Medication	Prompts desired Date Range and Display Terminal's Location. List all wasted events sorted by User Name in ascending order and Event Date in descending order.

**Rx MedOrder Reports** (these reports only available with a MedOrder system)

MedOrder Give Schedules	No Prompts. Lists all MedOrders and their Give Status' for the past 24 hours.
MedOrder Information	Prompts for MedOrder Status, MedOrder Earliest and Latest Stop Date, and Patient Visit Status. Shows MedOrder Information only. Could be used to determine which MedOrders are about to be Stopped.
MedOrder Missed and Given Late 8 Hour Shift	No Prompts. Lists MedOrders that were missed and given late for the Current Shift that the report is scheduled. The Shifts are: 7:00am to 3:30pm, 3:00pm to 11:30pm and 11:00pm to 7:30am. This report should be scheduled at 3:00 pm, 11:00 pm and 7:00 am.
MedOrder Missed and Given Late	No Prompts Lists MedOrders that were missed or given late for passed 24 hours.
MedOrder Override Graph by Supply	Prompts for desired Date Range and Supply by Generic Names. This Graph shows the total number of dispenses by Users that were not done through the MedOrder window for the Selected Supply.
MedOrder Override Graph by User	Prompts for desired Date Range and User Names. This Graph shows the total number of dispenses by supply that were not done through the MedOrder window for the Selected Users.
MedOrder Sig Codes	No Prompts. Lists all Sig Codes in the Database. Sorted in ascending order by Sig Code. To change the sort: Select the Report, Query and then click on the Sort Tab.

### Centrack Reports

For updated descriptions of Centrack Reports, please see the Readme file included with Examiner. To open the readme file, click on the **Start** button on the Windows Task Bar, select **Programs**, then select **MedSelect**, then select **Examiner Reference 6.0**, then **Centrack Examiner Readme**.

### Centrack Auto Reports

See page 8 for instructions on scheduling auto reports.

#### Centrack Events by Supply (Auto)

This report lists all Centrack Events and is sorted by Generic Name and Event Date in ascending order. Schedule this report after midnight to see all events from the previous day.

### Centrack Reports (Standard)

#### Borrow, Loan and Sell

For a specified Date Range, this report will show all the Borrow events and their corresponding Return Borrow events, the Loan events and their corresponding Return Loan events, and all the Sell events. Also, all events that are in-transit (they do not have their corresponding return event) will be included and the return quantity, return date, and return pharmacist for these events will be blank. This Report Should NOT be altered.

#### Centrack Audit Events

For a specified date range, this report will show all supplies that have been audited.

#### Centrack Below Minimum

This report will retrieve all supply positions within the pharmacy, where the position's current quantity is less than the position's minimum quantity. For each supply position, a calculated restock quantity will be provided to fill the position to its maximum quantity.

#### Centrack Database Supply Summary

This report lists all supplies in the database that have been assigned to a Centrack position.

Centrack Deposits	For a specified date range and selected Centrack User this report lists all medications Deposited (or Returned) into the pharmacy. The report can be filtered for a specific pharmacist. There will be a footer for every supply with the Generic Name and the total number of Deposits for that supply.
Centrack Events by Supply	For a specified date range and selected Centrack Supplies this report lists all Centrack generated Events.
Centrack Inventory Summary (DEA 2 Sort)	Lists all Centrack Supplies and where they are located in the Vault. The report is grouped by DEA 2's. Then the DEA 2's are alphabetical by Generic Name in ascending order, and all other DEA Schedules follow alphabetically by Generic Name in ascending order.
Centrack Inventory Summary	Lists all Centrack Supplies and where they are located in the Vault. The report is sorted by Supply Position Description.
Centrack Supply Tracking	For a specified date range and selected Centrack supplies, this report lists Centrack events and their corresponding Stock or Unload events. Expires are not currently included.
Compounds	Prints out all Withdraw Ingredient events for Compounding and the Compounds that were created for a specified time frame. This report can be used to verify that the correct number of compounds were created, (including wastes) in the vault. This report should NOT be altered.
Controlled Substance Inventory Summary	Prompts for cabinet location and DEA Schedule. There will be a footer for every supply with a total number of supplies for Locations selected. To print only the footer with the total summary, delete each column.
DT Withdraws	This report lists all supplies that have been Withdrawn from the vault and have not yet been Stocked to a Display Terminal.

Expired In-Transit Supplies	This report lists all events that are In-Transit and were Expired, Unloaded and Quarantined.
In-Transit	This report lists all events that are waiting to be Stocked to a Display Terminal, Returned to the Pharmacy, Quarantined or Wasted, etc. Note: Excludes paper tracking Withdraws.
Paper Tracking	This report lists all paper tracking transactions that have not been completed. A paper tracking transaction is a Withdraw event that is not Withdrawn to be restocked in a Display Terminal.
Quarantine	Similar to DEA Form 41, this report shows all medications that have been Quarantined and are waiting to be Surrendered. Page breaks separate package numbers.
Unit Package	Prints out all medications that were Withdrawn for Unit Packaging (Withdraw Bulk), and the associated Waste PH and resulting Deposit UnitPkg. that were created, for a specified time frame. This report can be used to verify that all Unit Packages have been accounted for (including Wastes) in the vault. This report should NOT be altered.

**SupplySource Reports**

For updated descriptions of SupplySource Reports, please see the Readme file included with Examiner. To open the readme file, click on the **Start** button on the Windows Task Bar, select **Programs**, then select **MedSelect**, then select **Examiner Reference 6.0**, then **SS+ Examiner Readme**.

**SS+ Auto Reports**

See page 8 for instructions on scheduling auto reports.

SS+ Refill Event Summary Last 7 Days (Auto)      No Prompt. This report lists all expires, stocked and unload events for the last 7 days

**SS+ Billing**

SS+ Billing (Auto)      For 24 hours prior to run date, lists charges and credits against patients.

SS+ Billing      For a specified Date Range, lists charges and credits against patients.

**SS+ Reports (Standard)**

SS+ Audit Worksheet      For selected Locations this report may be used as a worksheet when checking stocked quantities.

SS+ Available Positions      For selected Locations, lists all Tower positions that are available to have supplies assigned to them.

SS+ Configuration      Lists Controller information.

SS+ Day of the Week Total Usage      For a specified Date Range lists the total usage for a supply per day and the total usage for a supply for the entire date range.

SS+ Day of the Week Average Usage      For a specified Date Range, lists the Average dispenses for all Mondays, Tuesdays, Wednesdays, Thursdays, Fridays, Saturdays and Sundays.

SS+ Department Charges and Credits      For a specified Date Range, lists all charges and credits. After an Audit of a Location this report will show lost charges.

SS+ Location Dollar Value	For selected Locations, lists the total current dollar value of a supply by position and the total maximum dollar value of that position.
SS+ Nursing Inventory	For selected Locations lists all stocked inventory and their current position quantity.
SS+ Patients Detail	Lists Patients with open or on-hold visits, prompt for Visits Created by: AWS, DT, Interface or Control Center.
SS+ Patient Usage	For a specified Date Range lists all patients and their dispensed events. Also lists the Total Supply Cost per event and Total Patient Cost for the specified date range.
SS+ Supply Position Labels	For selected Locations Prints Labels for all Tower Positions and the supplies stocked in that position.
SS+ Refill Event Summary	For selected Locations and specified Date Range, lists all Stocking events, Total Quantity per Supply, Supply Cost per Event, Supply Cost per Tower and Supply Cost per Location.
SS+ Refill Positions Below Minimum	For selected Locations, lists all Supply Positions that are below their Minimum. Has the quantity needed to refill the Position to it's maximum. Or the Stock-It Quantity if Stock-It at the Display Terminal is going to be used.
SS+ Refill Position Stock Outs	Lists all Supply Positions that are Out of Stock. Has the quantity needed to refill the Position to it's maximum. Or the Stock-It Quantity if Stock-It at the Display Terminal is going to be used.
SS+ Refill Position to Maximum	For selected Locations, lists all Supply Positions. Has the quantity needed to refill the Position to it's maximum. Or the Stock-It Quantity if Stock-It at the Display Terminal is going to be used.
SS+ Staff Access Rights	For selected SupplySource Users, lists the Users and all of their access rights.

SS+ Staff Usage by Location	For selected Date Range and SupplySource Users, lists their Usage and the Total Usage Quantity per Supply, Total Cost per Event, Total Supply Cost per Supply and Total User Cost.
SS+ Staff Usage by Supply Graph	For selected Date Range and SupplySource Plus Supplies, shows the total User Usage in Graph form.
SS+ Supply Expiration Date	For selected Locations and Greatest Expiration Date, lists all supplies about to expire or that have already expired.
SS+ Supply List	Lists all SupplySource Supplies and some Detailed Information.
SS+ Supply Usage by Location Graph	For selected Location and specified Date Range, displays Supplies and their total usage in Graph form.
SS+ Supply Usage by Location	For a specified Date Range, selected Locations and selected SupplySource Supply, lists all usage by location. It also lists Event Total Cost, Total Quantity per Nursing Name, Total Supply Cost per Nursing Name and Total Location Cost.
SS+ Supply Usage by Material Name	For a specified Date Range, selected Locations and selected SupplySource Supply, lists all usage by Material Name and then Location. It also lists Event Total Cost, Total Quantity per Material Name and Location, Total Supply Cost per Material Name and Location, Total Quantity per Material Name (all Locations) and Total Supply Cost per Material Name (all Locations).
SS+ System Log Messages	For a specified Date Range, prints Log messages.(i.e. logging in to the Control Center or SS+ DT)

## The Discrepancy Report

MedSelect offers one other standard report that is not available from within Examiner. It can only be accessed from within the application (AWS, Centrack, or Control Center) or scheduled as an auto report. The Discrepancy Report has an .EXE File Extension not an IMR Extension. The file name is Discrep.exe.



### To print the Discrepancy Report

1. In the AWS and Control Center, from the **Management** menu, select **Discrepancy Resolution**.

In Centrack, from the **Tools** menu, select **Audit**, and then select **Discrepancy Resolution**.

The Discrepancy Resolution window is displayed.

2. Enter a **Date Range**.
3. Select the **Print Discrepancy Report** button.

Event Date	Event Status	Res Stat	DT	Supply Generic Name	User	Res
1/25/2001	Taken	Dpt Chrg	DT1	RANITIDINE	Moneypenny	No
1/26/2001	Taken	Pat Cred	DT2	OXAZEPAM	Q	No

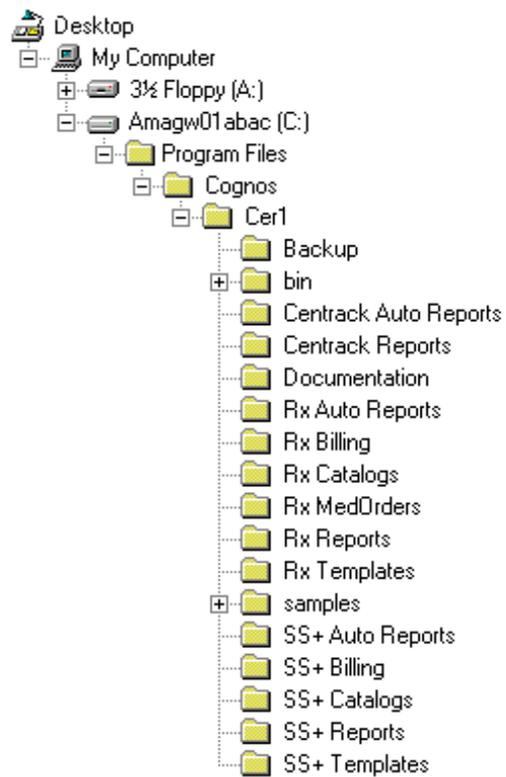
Patient: Bond, James - 741258      Room/Bed:   
 Supply Tradename: ZANTAC      Size/Units: 1 TAB  
 Supply Position: Cardiology Drawer 1-4B      Strength: 150 MG/TAB  
 Quantity Dispensed: 1      User Count Remaining: 2      User Dispense Count:   
 Resolved:       System Count Remaining: 4      System Dispense Count:   
 Resolution Description:

Show Previous Accesses      **Print Discrepancy Report**

To schedule the Discrepancy Report as an auto report, see page 8.

## Standard/Auto Report Location

All standard and auto reports can be found in the **C: (or D:)\Program Files\Cognos\Cer1** folder. You will see the folders for only the product(s) you have installed.



## Examiner Catalogs

### Rx Catalogs

There are two catalogs in the Rx Catalogs directory, Medview2.cat and Test2.cat. Medview2.cat will connect the user to the production database and Test2.cat will connect the user to the test database. These catalogs are used for the Rx MedSelect and Centrack applications. When opening a report, if a catalog has not yet been opened, Impromptu will default to the last catalog that the report you chose was connected to. To select your catalog option before opening a report, do the following:



#### To select a desired Rx Catalog

1. From the **Catalog** menu, choose **Open**.
2. To connect to the production database select **Medview2.cat**  
*OR*  
To connect to the test database select **Test2.cat**.  
(If you do not see these options, browse for the Rx Catalogs directory)
3. Click **Open**.
4. The Catalog Login box opens.
  - To run Rx MedSelect Reports or MedOrder Reports the User Class is **MedSelect**
  - To run Centrack Reports, the User Class is **Centrack**

**Note:** A user logged on as User Class MedSelect will not see any data on Centrack Reports, but a user logged on as Centrack will see data on Rx MedSelect and MedOrder Reports as well as the Centrack Reports.

### **SS+ Catalogs**

There are two catalogs in the SS+ Catalog directory, SupplySource.cat and Test SS+.cat. SupplySource.cat will connect the user to the SupplySource production database and Test SS+.cat will connect the user to the SupplySource test database. These catalogs are used for the SupplySource Product. When opening a report, if a catalog has not yet been opened, Impromptu will default to the last catalog that the report you chose was connected to. To select your catalog option before opening a report, do the following.

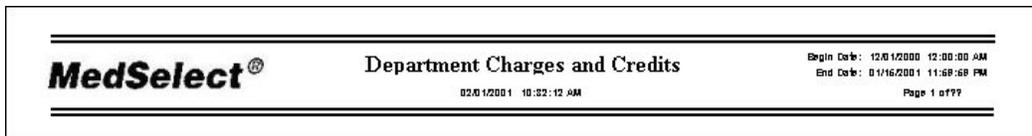
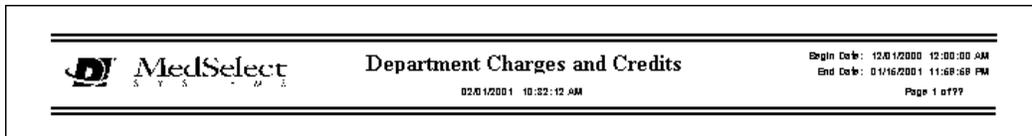


#### **To select desired SupplySource Catalog**

1. From the **Catalog** menu, choose **Open**.
2. To connect to the production database select **SupplySource.cat**  
*OR*  
to connect to the test database select **Test SS+.cat**.  
(If you do not see these options, browse for the SS+ Catalogs directory)
3. Click **Open**.
4. The Catalog Login box opens.
  - To run SupplySource Reports the User Class is **SupplySource Plus**.

## The Report Header

The report header contains important information about your report. Some headers may appear as shown in the bottom graphic.



If you were prompted to enter a date range when opening the report, the begin and end dates are displayed in the upper right corner of the report.

The date and time the report was generated displays under the name of the report.

The page number will display in the lower right corner of the Header. The total number of pages will be noted with question marks, e.g., *Page 1 of ??*. This occurs because the report has not yet been paginated. If you would like to know how many pages are in the report before printing it, click the **Print Preview** button on the Standard toolbar. When you print the report, it will paginate and the proper page number information will be on the report.



## **Chapter 2**

### **Modifying Standard Reports**



### **Modifying vs. Creating a Custom Report**

Examiner reports have been meticulously created with the input of pharmacy personnel and supply managers. Many of the Standard reports (see page 10 for a complete list) should serve your needs with little modification. Please explore the entire list of standard reports before deciding to modify a standard report, or create a custom report.

If you decide that you simply need to modify an existing standard report, this chapter will aid you in learning how to “tweak” reports by hiding data, adding a data field, etc. For information about creating custom reports, see Chapter 3.

## Creating a Custom Report Directory

All modified standard reports must be saved to a separate “custom report” directory. This will prevent your modified reports from being deleted during routine software upgrades of MedSelect products.



### To create a custom report directory

1. Open Windows Explorer.
2. Click on the **C:** (or D:) drive.
3. From the **File** menu, select **New**, then select **Folder**.
4. Name this folder **Custom Reports**.

If you have more than one software application running on this PC (e.g., the AWS and Centrack), you may want to create a folder for each, for example: **Rx Custom Reports** and **Centrack Custom Reports**.

5. Close Windows Explorer.

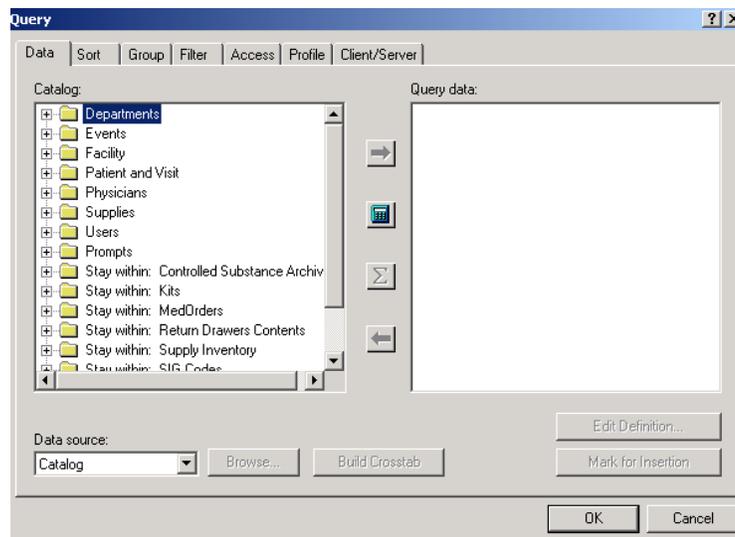
## Saving a Modified Version of a Standard Report

By saving your report you will save the *format* of the current report. The *data* displayed on the report does not get saved.

Saving of customized reports should always be at the Custom Report Directory created above.

## How Impromptu Uses Folders

Impromptu has designed a window into the database that allows you to view and build queries against the data elements, while insulating you from the complexities of the MedSelect database. The complexities of the database occur because of the way in which certain data elements are joined together. Logical groupings of data elements have been assembled to insure that your customized reports function properly. The objects used to display these logical groupings are folders.



Folders are meaningful groupings of information and are broken down into logical subsets, each containing data from numerous MedSelect database tables.



### To open a folder, double click on the folder name.

All the associated data items are displayed. A folder can have subfolders. The subfolder is a logical grouping within its parent folder. If a folder has subfolders, the folder icon has a plus sign, which means it can be expanded.

To determine what folder the desired data is located in when creating a custom report, determine what type of information is needed in general terms. Search and find folders that would logically have that information. Open the folder(s) and verify the data needed is contained in that folder(s). Some data items have been duplicated between folders so that all data items needed for a report may easily be found.

**Grouping Data on a Standard Report**

All the Examiner standard reports use grouping to organize data in an understandable manner. Often, the grouping is on a calculated field that is complex. Therefore, it is recommended that users make no changes to the existing grouping of the Examiner standard reports.

**Sorting Data on a Standard Report**

When customizing a standard Examiner report, the only recommended change to the sorting is to change from ascending to descending or visa versa. Additional sorts are not recommended.

**Filtering Data on a Standard Report**

Any data elements added to or previously existing within the report may be filtered, as long as the rules for modifying data items of standard reports have been adhered to (see *Modifying Data Items* at the beginning of this chapter). For a detailed explanation of filtering see **Chapter 4**.

**Calculations of a Standard Report**

Existing calculations should not be modified. Additional calculations can be created and added to standard reports. Exception: Do not add, remove, or modify calculations from the *Discrepancy Report*, the *Velocity Report (by Location)*, or the *Velocity Report by Supply*. For a detailed explanation of calculations see **Chapter 3**.

## **Chapter 3**

### **Creating Custom Reports**



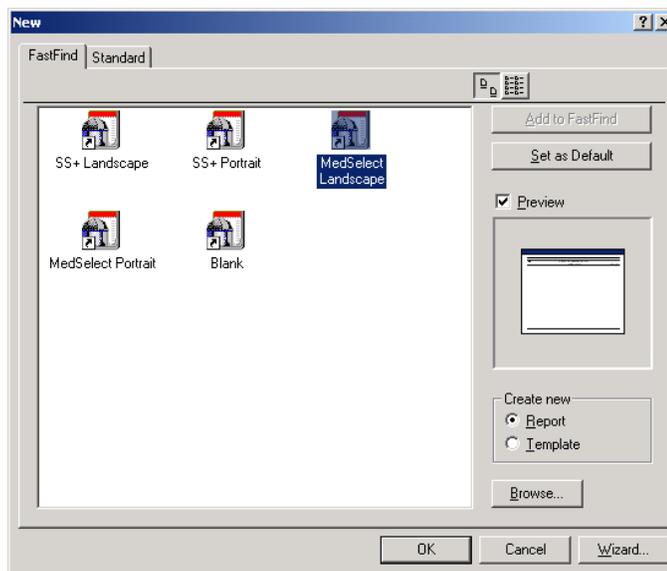
## Templates

A template is a pattern you can use to build reports. Using templates to create new reports can save you time and effort. Examiner offers several templates to aid in the creation of reports.

To begin the creation of a new custom report, from the **File** menu, select **New**.

The New dialog box is displayed with the selection of templates from which to choose.

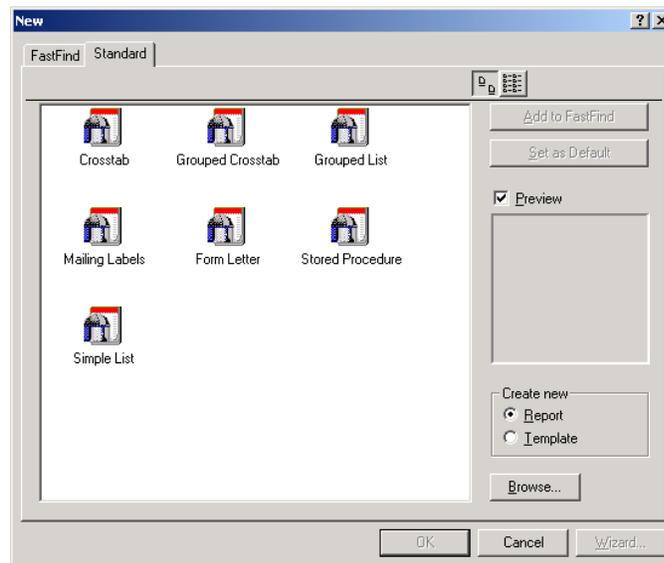
On the “**Fastfind**” tab templates listed as shown below:



**MedSelect:** By choosing this template, your report will have the same header as the standard MedSelect reports.

**Blank:** This template is best when multiple frames are to be combined for a report.

On the “**Standard**” tab templates listed as shown below:



**Crosstab:** This template creates a crosstab report that shows summary information from a list report in a compact table of rows and columns. A crosstab shows the value for the intersection point of each row and column.

**Grouped Crosstab:** This template is similar to the crosstab but also groups the data.

**Grouped List:** This template is similar to a simple list but also groups the data.

**Mailing Labels:** This template is used to create mailing lists.

**Form Letter:** This template creates a letter using data items from the database, such as patient name and address. The addressee lines are completed with the data items and then there is a free text area for the body of the letter.

**Stored Procedure:** Used for complicated multi-report formats

**Simple List:** This template creates a report that lists data items in columns and rows. The result looks similar to a spreadsheet.

## The Query Dialog Box

The Query dialog box is the integral part of the Impromptu product. This dialog box has seven (7) different tabs:

1. **Data:** Allows for the insertion and deletion of information to be displayed on a report. The Data window has the following components:
  - Catalog list box
  - Query Data list box
  - Various buttons
2. **Sort:** Allows data on a report to be sorted in various combinations. The sort window consists of:
  - **Sort Order:** A box for specification of the sort order of the selected data items
3. **Group:** Allows for grouping of data to improve the readability of a report. The group window consists of:
  - **Group Order:** A box for specification of the group order of the selected data items
4. **Filter:** Provides the ability to display only data that meets the specified criteria.
  - Available filter component box
  - Filter definition box
5. **Access:** Determines how data is accessed.
6. **Profile:** Shows detailed information about the query.
7. **Client/Server:** Sets the type of query processing.

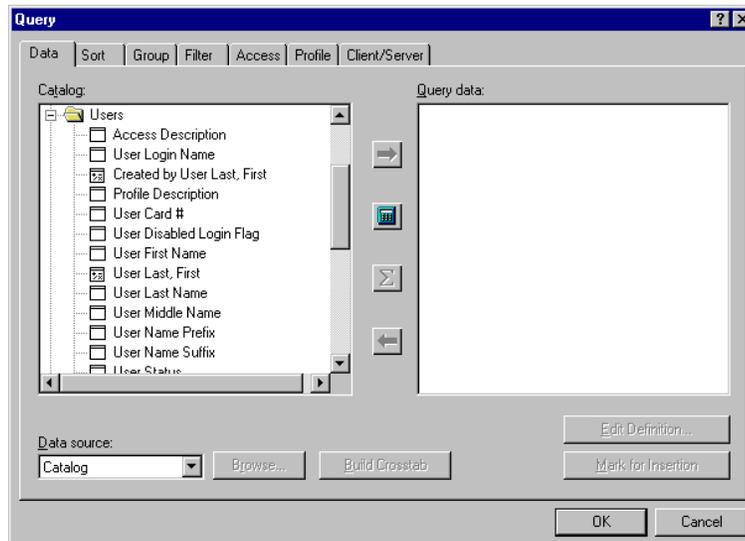
### Adding Data to a Report

Within the Data tab of the Query dialog box is the Catalog list box. The Catalog list box displays folders of common data. The folders must be opened to view the data items.



#### To open a folder and view the data items:

- Double-click on the desired folder



Data items can be added to the Query Data list box by:

- Double clicking on the data item  
*OR...*
- Clicking once on the data item, then clicking on the **Add** button 

### Removing Data from a Report

Removing a data item from the Query Data list box can easily be accomplished.



#### To remove an item:

- Select the data item to be removed
- Click on the **Remove** button 

**Note:** Data may be used from multiple folders ONLY if the folders are not Stay Within folders.

## Grouping

Grouping lets you arrange your data into logical chunks of information. For example, you may want to group data by user name so that you can easily view the usage for each nurse.

When you group on a data item, the following occurs:

- All data within the group is sorted in ascending order.
- A break occurs each time a new data value begins.
- The value that the data is sorted on is printed once within each grouped segment.
- Grouping data causes some automatic sorting.

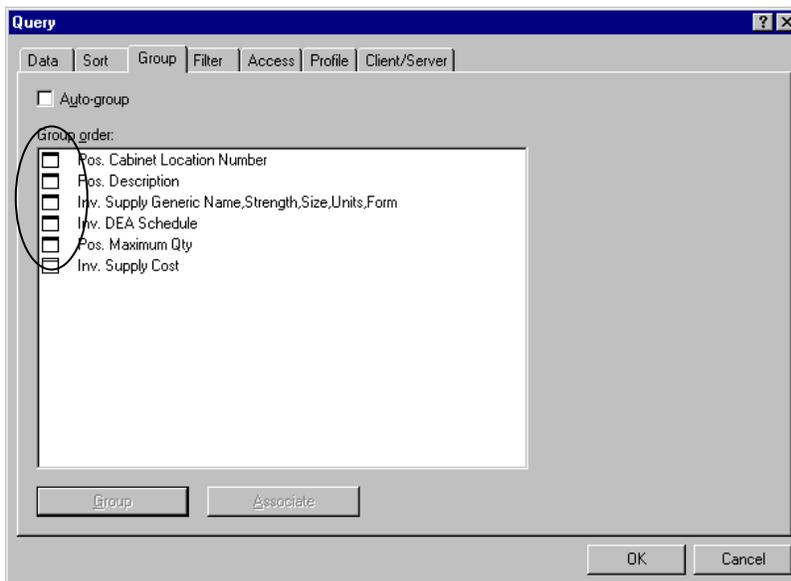


**To select data items for grouping from within the Group Query dialog box:**

1. Select the data item.
2. Click on the **Group** button.

The order of the grouped items determines the order in which grouping is executed in the query.

Grouped items are identified by a black bar across the top of the data item icon. In the following example the first five (5) data items are grouped:



Grouping can also be done from the report screen. To group a particular column of information:

- Select any data item in the column to be grouped on.
- Click on the **Group** button  found on the Standard Toolbar.

**Note:** It is more efficient to group data items from the data query window. If data is first retrieved for a report and then grouping is applied, the query must be re-executed. This increases Examiner's query time.

### **Associate**

Associating data items link them together for grouping purposes. By associating two data items together, the second item will be grouped according to the first data item. Associating a data item will cause it to display as a single value only at the beginning of an associated grouped column. This eliminates redundant information and makes your report more readable.

Associated data items must have a one-to-one relationship to each other. An example of a one-to-one relationship between data items would be Supply Generic Name and DEA Schedule. A particular Event's Supply Generic Name would always be associated with a specific DEA Schedule.



#### **To associate a data item:**

1. Select the data item within the group tab of the query dialog box.
2. Click on the **Associate** button.

An associated data item has half of a black bar across the top of the data item icon.

## Sorting

Sorting allows you to organize your data alphabetically, numerically, or by date. A report can be sorted on a single data column, or on multiple data columns. The order in which you select the items to be sorted determines the sort order.

For instance, you may want to sort your Supply Generic Names in ascending alphabetical order for easy reference.



### To sort in ascending order:

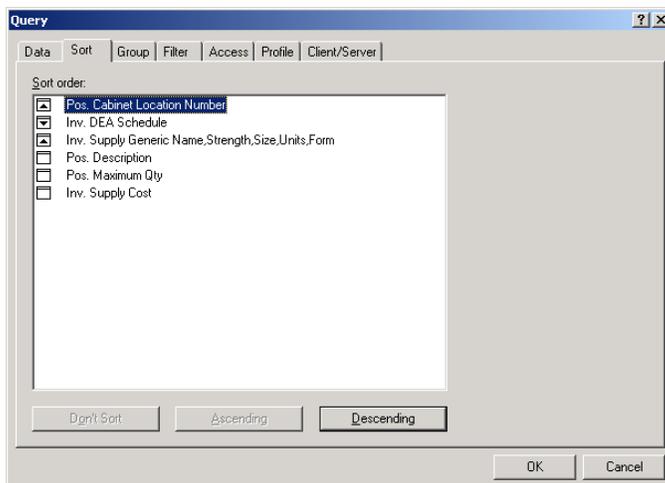
1. Select the data item.
2. Click the **Ascending** button.



### To sort in the descending order:

1. Select the data item.
2. Click on the **Descending** button.

You can tell that certain items are sorted in the query below because ascending or descending sort arrows appear next to the data description.



**To remove sorting from a data item:**

1. Select the data item.
2. Click on the **Don't Sort** button.

**Sorting can also be done from the report screen. To sort a particular column of information:**

1. Select any data item in the column to be sorted on.
2. Click on the **Sort Ascending** button  .

*OR...*

3. Click on the **Sort Descending** button  .

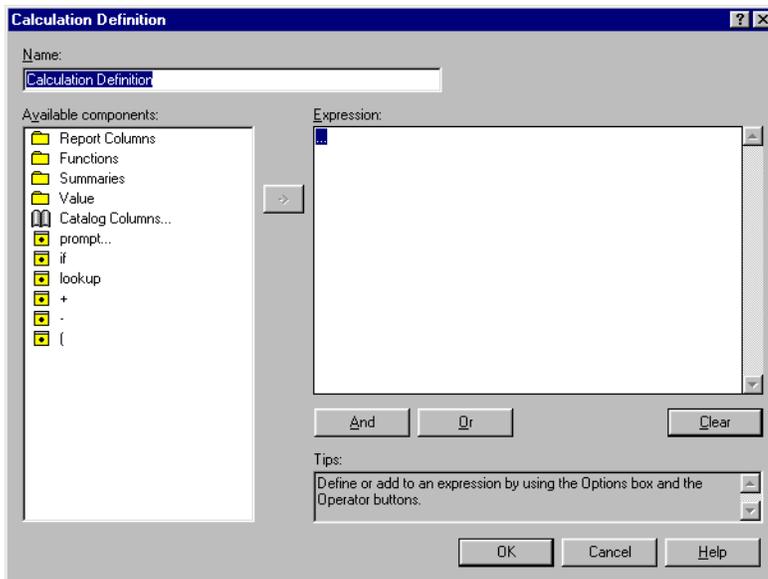
---

**Note:** Group data items before sorting the data items.

---

## Calculations

Calculations can be added to the Query Data list and displayed on the report. The Calculation Expression Editor is used to create calculations.



Impromptu has an Expression Editor to assist in building calculations. The Expression Editor is used to create and edit calculations. The main components of the Expression Editor are:

- Name text field: the name of the calculation
- Available components: the available options from which to choose when creating/editing a calculation
- Expression text box: the expression in its current state
- The tips text box: context-sensitive help aids in creating a valid expression
- Buttons:
  - ? And/Or conjunction buttons
  - ? Clear removes the current expression in the Expression text box
  - ? OK saves changes to the calculation
  - ? Cancel exits the Expression Editor without saving changes
  - ? Help provides on-line help

A calculation combines operators, constants, functions, report columns, and other components to compute a new data item based on existing data items. As a result, calculations can derive information that is not directly available from the data in the database.

By using calculations, you can do the following:

- Combine existing data items in a report with operators to create new data items. For example, multiplying Supply Cost by Quantity to find the Total Cost.
- Use value constants to define specific components. For example, combine supply size with supply size units to make a data item supply size/units.
- Use functions to re-format data items. For example, applying mixed case to all patient last names.
- Use summaries to calculate total costs for each medication or average costs of medications in cabinets.
- Use conditional expressions that define specific conditions for a new data item. For example, insert the full state name (such as New York) if a data item only shows an abbreviation (such as NY).

## **Chapter 4**

### **Filtering**



## Filtering

Filtering enables you to retrieve a specific subset of records for your report. This means that you can filter out unnecessary data and highlight the most important information in your report.

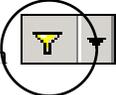
The easiest way of creating a filter is to do it right from the report display.

Event Date	Supply Trade Name	Size Units	Status Desc.	Qty	User Last, First
02/12/2000 06:44PM	Ery-tab	1	Taken	-1	LPN, Nathan
02/12/2000 06:48PM	IV-HEPARIN	500 ml	Taken	-1	LPN, Nathan
02/12/2000 04:41PM	Diprivan	50 ml	Stocked	0	Technician, Amber
02/12/2000 04:43PM	Ery-tab	1	Taken	-1	RN, Nancy
02/12/2000 03:34PM	PERCOCET	1	Taken	-1	RN, Nancy
02/12/2000 03:43PM	PERCOCET	1	Wasted	1	RN, Nancy
02/12/2000 12:53PM	IV-HEPARIN	500 ml	Expired	-6	Technician, Amber
02/12/2000 02:15PM	IV-DEXTROSE 5%/M	50 ml	Stocked	0	Technician, Amber
02/12/2000 08:43AM	FERRICUS SUII FATE	1	Taken	-1	LPN, Marv



### To filter data:

1. Select one or more data items from your report on which to filter. To select multiple data items from the same column, hold down the Ctrl key and select the values.

2. On the Toolbar, click on the **Filter** button 

When selecting the Filter button, Impromptu will re-retrieve only the data based on the values selected. By filtering out data that is not of interest, the report becomes more meaningful and useful.

Filtering can also be done by selecting a data item and clicking on the down arrow next to the filter button, select "in", at this window you can choose one or more values. 

The above filtering method is executed after data has already been retrieved. Depending on the amount of extraneous information in the report, the content of this data may take longer to process. Extraneous data can also make the report less usable.

To improve the efficiency of database processing, create the filter prior to retrieval of data from the database. Filters can be built into the initial query using the Filter tab in the Query dialog box. By building the filter into the initial query, the database is saved from that second hit.

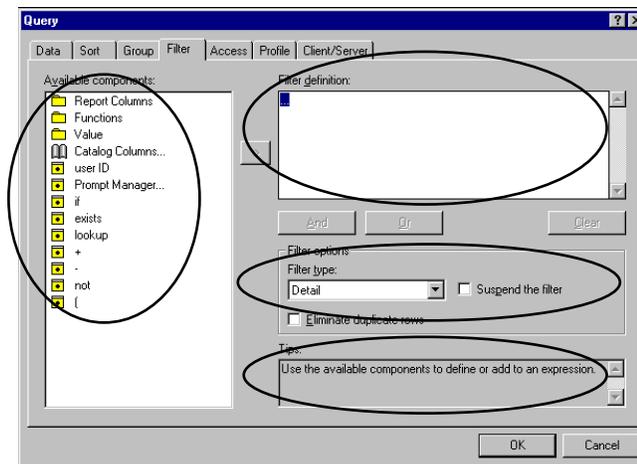


**The Expression Editor is used to define filters. To access the Expression Editor for filtering:**

1. From the **Report** menu, select **Query**.
2. Select the **Filter** tab option.

*OR...*

Hold down the **Ctrl** key while clicking the **Filter** button .



The Expression Editor for filtering contains several components:

- *Available components:* Only the components that create a logical expression are displayed.
- *Filter definition (expression) text box:* This text box displays the filter expression as it is being created.
- *Filter options:* Special filter options such as filtering by data or by summary data items.
- *Tips:* Context sensitive tips are displayed as the filter expression is being created. This box is helpful when you are uncertain of what to do next or the filter expression is not syntactically correct.

## Filter Components

### Report Columns

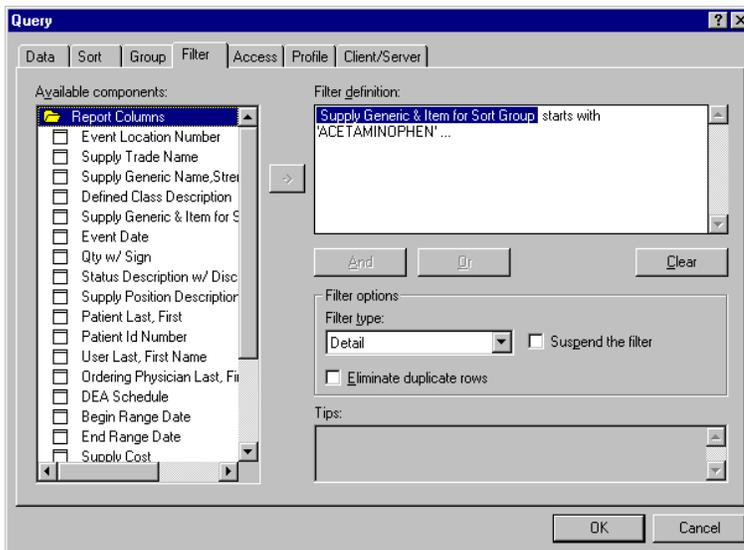


#### To filter using data items in the Report:

1. To display the data items included in a report, double click on the **Report Columns** folder.

#### Example:

To view events that occurred for the Supply Generic Name “Acetaminophen” your Filter expression should look like this:



## Functions

Functions are pre-defined calculations that take one or more values, perform an operation, and return a result. Functions provide an easy way to perform complex data manipulations within calculations.

There are three (3) main types of functions:

1. Numeric functions: perform mathematical or statistical calculations on numeric data
2. String functions: perform operations on character data (strings)
3. Date functions: perform operations on date fields, which includes dates, date-time, or date intervals

**Note:** Be careful to match the data types to those expected by the function.

The **Tips** box is especially useful when using functions. If additional information is needed about a function, select the function. The Tips box displays the syntax and an explanation of what the function does.

### Calculating Date Intervals using Functions

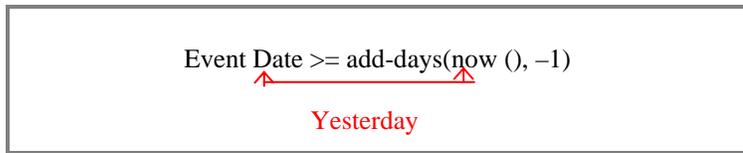
Hospitals are often interested in reports that cover a certain period of time. For example, viewing usage for certain types of medications for the past week or month.

There are two sources for date data:

- Date fields in the database, such as event date.
- The system date of the computer.

The Now () function can be used to reference the system date and time of the computer that contains the MedSelect database. This creates a point in time that is continuous and automatically updated.

Assume the only events desired on a report are the last 24 hours of events. Utilizing the Now() function makes this expression simple to create.



This expression uses two functions: `add-days` and `now()`. The syntax for `add-days` is

```
add-days (date_exp, integer_exp)
```

indicating that the `add-days` function consists of two parameters.

- The first parameter, `date_exp`, needs a date expression. In this example, the `now()` function was used.
- The second parameter, `integer_exp`, needs an integer value. Since this function calculates 'yesterday' from current date, the integer value used was `-1`.

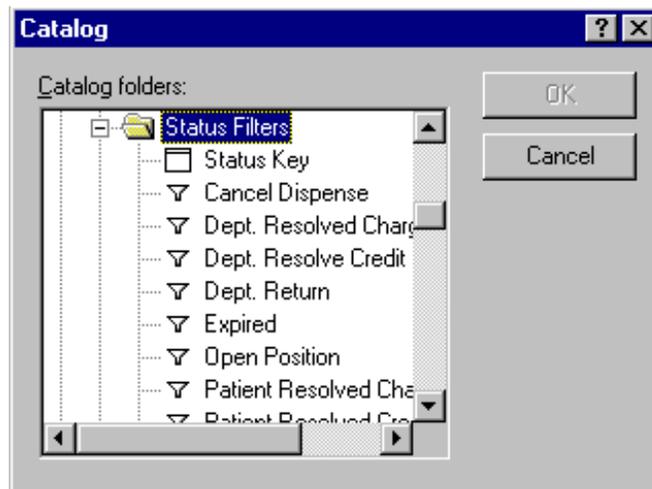
### Values

These are constants that can be used in filter expressions.

## Catalog Columns...

### Predefined Conditions

- Predefined conditions are created by the Impromptu Administrator and stored in the catalog.
- You can use these predefined conditions to:
  1. Create a filter containing only the predefined condition.
  2. Create a more complex filter expression by combining the predefined condition with other conditions.



Catalog conditions, are predefined conditions as they are sometimes called, are added to a filter definition in the filter expression editor.



### To add a predefined condition to your report:

1. Double click **Catalog Columns** in the Available components list.
2. Locate the condition that you want to include in the filter expression.
3. Double click it to add it to the filter expression.

Because predefined conditions are also valid filter expressions, they can be used as the complete filter expression. They can also be part of a larger filter expression in conjunction with the logical operators *and* and *or*.

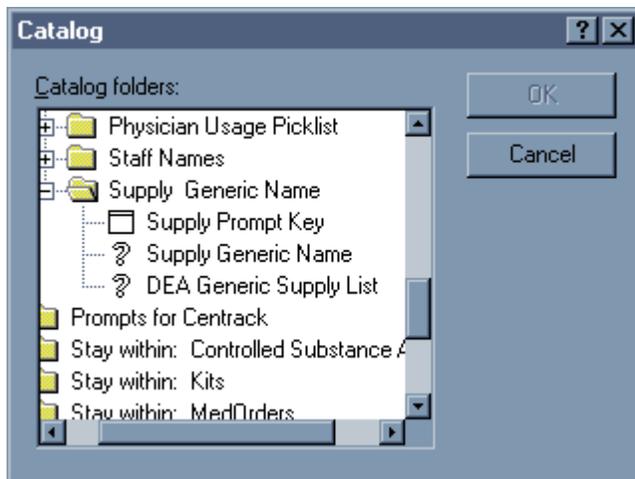
### Predefined Prompts

Predefined prompts are created by the Impromptu Administrator and stored in the catalog.



#### To add a predefined prompt to your report:

1. Double click on **Catalog Columns** in the available components list.
2. Locate the **Prompts** folder and desired catalog prompt.



#### To prompt for the Supply Generic Name:

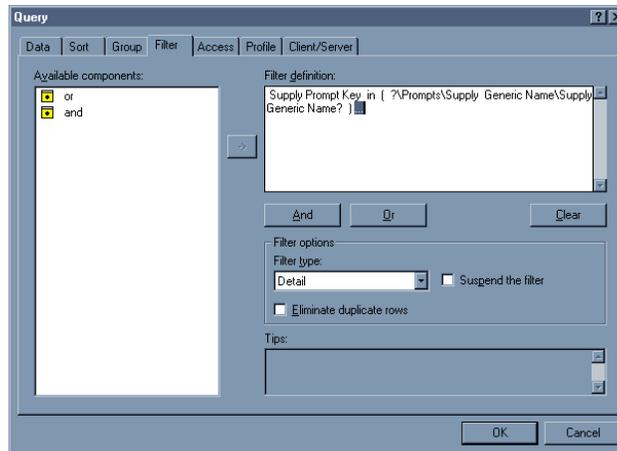
1. Double click on **Supply Prompt Key**.
2. Under **Available components**:
3. Select the **“in”** operator.
4. Double click on the **open parenthesis (**.

5. Double click on **Catalog Columns**.
6. Locate the **Prompts** folder.
7. Open the **Supply Generic Name** folder.
8. To include all **Supply Generic Name** double click on **Supply Generic Name**.

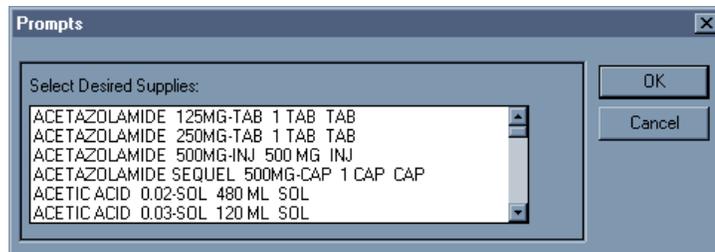
*OR*

9. To include **Schedules** supplies only, double click on **DEA Generic Supply List**.
10. Double click on the **closed parenthesis )**.

The filter expression looks as follows:



The resulting prompt:



Catalog defined prompts cannot be edited.

## Prompt Manager...

A prompt is a dialog that appears when you open a report. It assists in filtering the report. Prompts can be report specific. A single prompt cannot be used in two different reports.

### *There are four types of prompts:*

The Type drop down list within the **Prompt Definition** dialog box displays four options from which to choose.

1. Type in
2. File picklist
3. Report picklist
4. Catalog picklist

### Type-In Prompt

A type-in prompt appears when you open or run a report. You have to type in one or more values (numeric or character strings) that tell Examiner how to filter the report. Examiner is case-sensitive and retrieves information that exactly matches the value entered.

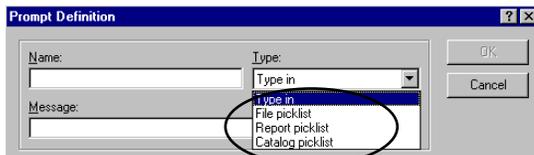
Type-in prompts are often used to enter start and end points for:

- Data filters

Many of Impromptu's standard reports use Type-In prompts for a date range of data to display.

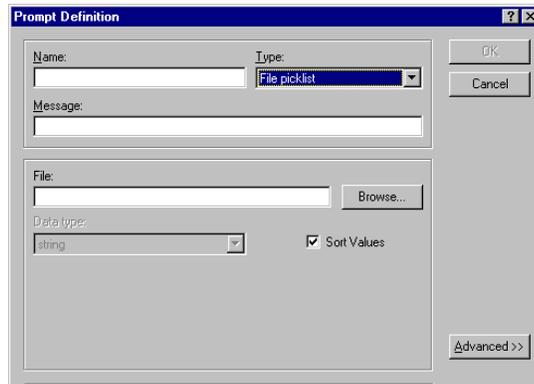
### Picklist Prompts

There are three different picklist prompt types.



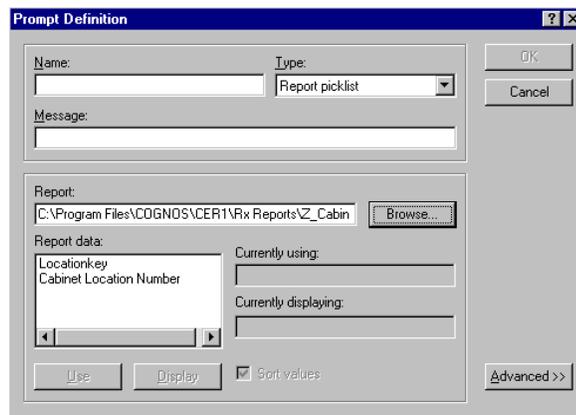
### File Picklist

A file picklist prompts you to select a report filter value from a specified text file each time you open or run the report. The text file must be saved in a comma delimited ASCII format. File picklist prompts are useful when you want to filter the report from a specific list of data, rather than the data in the catalog.



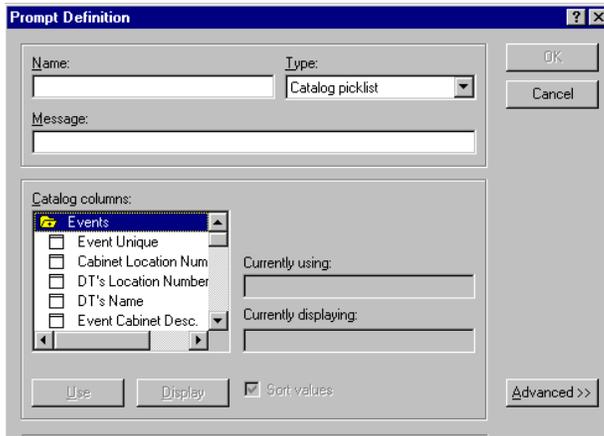
### Report Picklist

A report picklist prompts you to select a filter value for the current report from a data item in a saved report. You select a value from this saved report when you open or run the report. You can use a report picklist prompt to limit the information in a report to the values in another report.

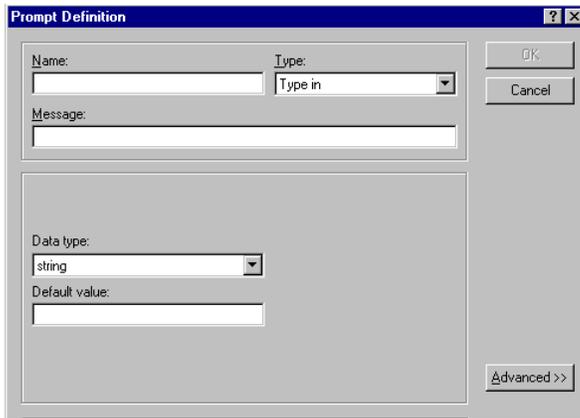


### Catalog (Folder) Picklist

A catalog picklist prompts you to select a filter value from a folder data item. The Prompts dialog shows all values for the selected data item. Be sure to select data values only from the folders (and any subfolders) used to create the report.



The **Prompt Definition dialog box** has the following fields:



- **Name:** A description of the prompt to be created.
- **Type:** Indicates what type of prompt's to be created.
- **Message:** Text to be displayed in the Prompts dialog box.
- **Data type:** String, number, date, time, date-time or interval.
- **Default Value:** A default value can be displayed in the Prompts dialog box.

### **Editing a Prompt**

**A Report Specific prompt can be edited from within the Filter Query dialog box. To edit a prompt:**

1. Double-click on the prompt name in the Filter Definition box of the Filter Query dialog box.

The Prompt Definition dialog box is displayed.

2. Edit the prompt as desired.
3. Select the **OK** button.

The Prompt is now modified.

4. Run the query again to view the modification.

### **Operators**

These are signs that specify what happens to the values on either side of the operator.

### **Miscellaneous components**

Other miscellaneous components may be displayed, such as parentheses.

### **Filter Options**

There are two types of filters:

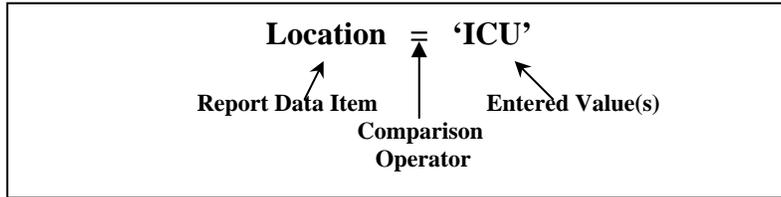
- **Detail Filter:** Filters on report data items. This is the default type of filter.
- **Summary Filter:** If a report includes one or more summary data items, such as total dispense quantity, you can filter the report on the summary data item using a summary filter.

Examiner has the option to filter out repetitive information on a report. To retrieve only unique rows of data, check the **Eliminate Duplicate Rows** check box.

A report can be run with or without its filter by clicking on the **Suspend Detail Filter** check box. When this box is selected, report data will be retrieved without applying the filter.

## Filtering Syntax

Filters are based on expressions that result in a true-false value. The most basic filter involves a comparison between two sides of an equation. One side of the equation refers to a report data item and the other side refers to an entered value.



If the expression equates to true, then the record is displayed on the report. Following are syntax for some of the more commonly used operators.

<report data item> > <numeric value> **and** <report data item> <= <numeric value>

Example: DEA Schedule > 1 and DEA Schedule <= 6

Note: Numeric values are not enclosed in single quotes

<report data item> **between** <value or expression> **and** <value or expression>

Example: Event Date between add-days (now(), -1) and now()

Note: both criteria must be met for the value to be returned and displayed on the report.

<report data item> = '<value or expression>' **or** <report data item> = '<value or expression>'

Example: User First Name = 'Martha' or User First Name = 'Mabel'

Note: The equal (=) operator requires an exact match and is case-sensitive. In this example, if the database has a user first name value as 'martha', this value would not be displayed on the report.

When using the *or* operator, the data item need only meet one of the criteria to be displayed on the report.

<report data item> **in** (value, value, value...)

Example: Status key in (14, 16, 19, 37)

**Note:** As many values as necessary can be placed between the parentheses provided. A comma separates each value.

<report data item> **like** '<value or expression>%'

Example: Location like 'Cardi%'

Note: The percent sign (%) acts as a wild card. Therefore, all data items that match the text up to the percent sign will be returned and displayed on the report. In the above example, the following might be returned: Cardiac, Cardiology, and Cardiopulmonary. However, CT would not be returned.

When using the 'like' operator, a percent sign (%) must be used. The *like* operator is case sensitive.

To reduce the amount of processing necessary, it is better to use as many characters as possible before the percent sign (%). It is also more efficient to *not* use the percent sign (%) at the beginning of the expression.

<report data item> **contains** '<value or expression>'

Example: Location contains 'ardi'

Note: *No* percent sign (%) is needed with the *contains* operator.

All data items that contain the text in the same order are displayed on the report. In the above example, the following might be returned: Cardiac, cardiac, Cardiology, cardiology, Cardiopulmonary, cardiopulmonary. However, Dietary would not be returned even though it contains the letters *ardi*; the letters must appear in the same order.

The *contains* operator is case-sensitive.

It is more efficient to use the *like* operator than the *contains* operator if the *like* operator doesn't start with the percent sign (%). The reason is that the *like* operator can use the database index to retrieve data more efficiently than by searching all database records, which is what the *contains* operator does.

## **Chapter 5**

### **Advanced Formatting**



## Types of Frames

Frames act as containers for report objects, such as text, data, pictures, and charts. Frames are the building blocks of Examiner reports and templates.

Impromptu has five (5) different types of frames:

1. List Frame
  - This type of frame holds data in a tabular row and column format, similar to a spreadsheet.
2. Text Frame
  - This type of frame holds text or numeric values.
3. Form Frame
  - A form frame is a container for other frames used in a report.
4. Chart Frame
  - A Chart frame is a graphic representation of data. Charts allow for a quick, visual evaluation of data.
5. Picture Frame
  - A Picture frame holds graphics. A hospital logo would be displayed in a picture frame on a report.

There is no limit on the number of frames that can be placed within an individual report. Some frames can also be nested within another frame.

You can insert frames or report objects into:

Form frames

List frames

You cannot insert frames into:

Chart frames

Picture frames

Text frames

## List Frame

A list frame contains data in rows and columns, similar to the display of spreadsheets. When you add a report data item, it is repeated on every row.

Supply Trade Name	User Last, First	Event Date	Status Desc.	Quantity
Ery-tab	RN, Larry	02/12/2000 06:56PM	Taken	-1
Thiopental Sodium	Nurse, Ryan	02/12/2000 08:56PM	Taken	-1
Biaxin	LPN, Lucy	02/13/2000 12:04AM	Taken	-1
PERCOCET	LPN, Lucy	02/13/2000 12:05AM	Taken	-1
Biaxin	LPN, Lucy	02/13/2000 12:05AM	Taken	-1
Biaxin	LPN, Lucy	02/13/2000 12:06AM	Taken	-1

List frames can be the entire report in itself or they can be inserted into other frames to create lists of data items within a more complex overall report.



### To create a list frame:

1. From the menu bar, select **Insert**, then select **List Frame**.

*OR...*

Click on the **List Frame** button .

*THEN...*

2. Place the cursor where the list frame is desired and draw the frame size.
3. With the list frame selected (highlighted),

From the **Insert** menu, select **Data**.

*OR...*

From the **Report** menu, select **Query**, then select the **Data** tab.

*OR...*

Click on the **Data** button .

*THEN...*

5. **Select** the data to be displayed in the list frame.

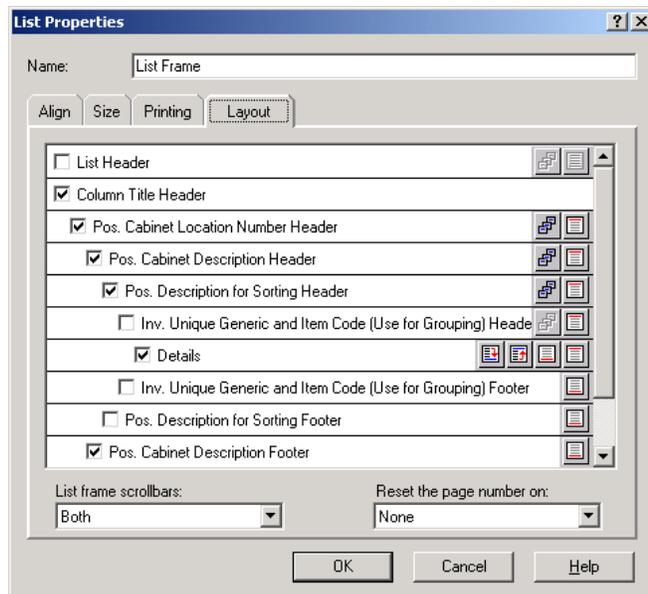
## List Properties

Each **List frame** has properties: Align, Size, Header/Footer, and Page Breaks.



To access the list frame properties:

1. Select the entire list frame.
2. Right click and select **Properties**.



### Align

The **Align** tab option allows for aligning objects within a report, or data items within a frame:

- Align a frame with the top, bottom, left, right, or center of its parent frame.
- Align report objects within a selection box or within a report.
- Distribute report objects evenly within a selection box or within a report.

### Size

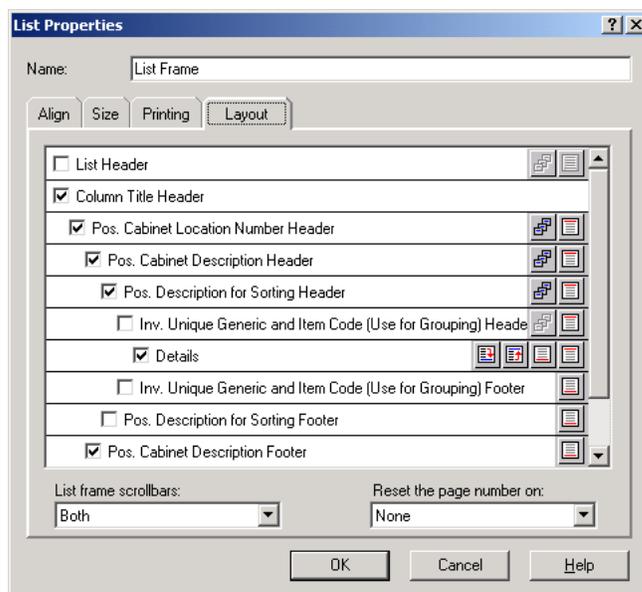
Resizing can be done manually by using the object handles or resizing can be done by specifying exact sizes. The Size tab option of the Properties box is used to specify exact sizes.

- The height and width can be specified to meet specific requirements.
- The report object can be sized to match the parent frame (Snap to Parent). 
- The header and/or footer can be sized to match the width of the columns in a list frame (Snap to Columns).

### Layout

Headers and footers can serve a very useful purpose in a list style report. They can enhance a report's appearance by containing your company logo, a date, and a time stamp. Or, you can use these free format areas to highlight grouped data and provide a location for summaries of detail rows in the report.

The **Headers/Footers** option tab of the Properties box allows for adding and removing headers and footers.



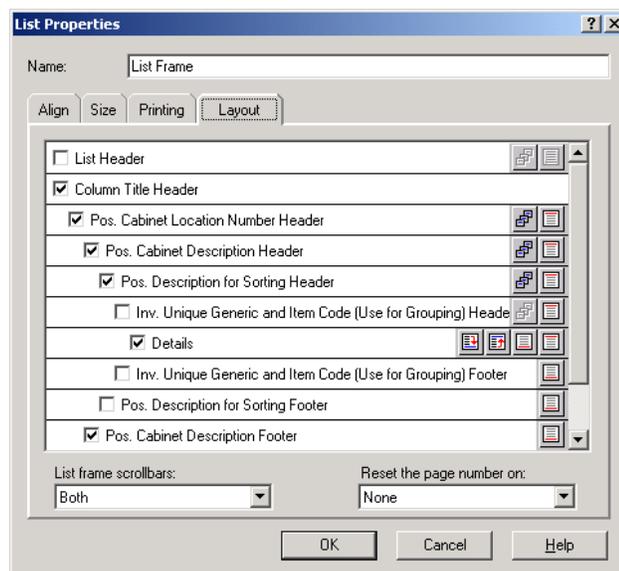
This window displays if the list frame contains a header or footer.

- If a check appears to the left of the section, it exists in the list frame. In the above example, the list frame already has a header and footer.
- To not include either a header or footer, click on the check to remove it from the list frame.

Headers and footers are actually form frames into which any report object can be inserted. Footers should be used when Summarized data is needed.

### Page Breaks

Impromptu has a page break function for list frames that is similar to a page break when using a word processing software package. If it is desired to start a new section of the list frame on a new page, simply check it accordingly in the Page Breaks tab option of the Properties box.



## Text Frame

A text frame can contain text that is manually entered or it can contain data from the database.

- Text that is manually entered into a text frame can be manually changed.
- A text frame containing data from the database cannot be manually changed.



### To add a text frame to a report with *manually entered data*:

1. From the menu bar, select **Insert**, then select **Text Frame**.

*OR...*

Click on the **Text Frame** button .

*THEN...*

2. Place the cursor where the text frame is desired and draw the frame size.
3. Type the desired text.

Supply Trade Name	User Last, First	Event Date	Status Desc.	Quantity
Ery-tab	RN, Larry	02/12/2000 06:56PM	Taken	-1
Thiopental Sodium	Nurse, Ryan	02/12/2000 08:56PM	Taken	-1
Biaxin	LPN, Lucy	02/13/2000 12:04AM	Taken	-1
PERCOCET	LPN, Lucy	02/13/2000 12:05AM	Taken	-1

Manually enter text in a text frame

Below is the list report used in the previous section. Every cell in a list frame is a text frame. This is an example of text frames containing data from the database. The text in these text frames cannot be manually edited.

Manually enter text in a text frame				
Supply Trade Name	User Last, First	Event Date	Status Desc.	Quantity
Ery-tab	RN, Larry	02/12/2000 06:56PM	Taken	-1
Thiopental Sodium	Nurse, Ryan	02/12/2000 08:56PM	Taken	-1
Biaxin	LPN, Lucy	02/13/2000 12:04AM	Taken	-1
PERCOCET	LPN, Lucy	02/13/2000 12:05AM	Taken	-1

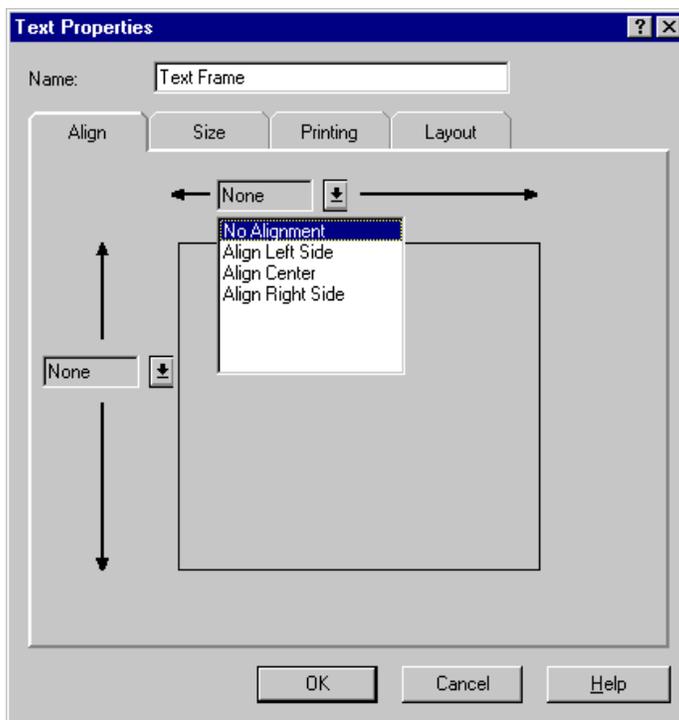
## Text Properties

Each **Text frame** has properties: Align, Size, and Layout.



**To access the text frame properties:**

1. Select the entire text frame.
2. Right click and select **Properties**.



### Align

The **Align** tab option allows for aligning text within a report, or data items within a frame:

- Align a frame with the top, bottom, left, right, or center of its parent frame.
- Align report objects within a selection box or within a report.
- Distribute report objects evenly within a selection box or within a report.

- To align multiple text frames, use the align buttons. 
- While holding down the **Ctrl** key, select the text frames.
- Select the desired alignment button.

### Size

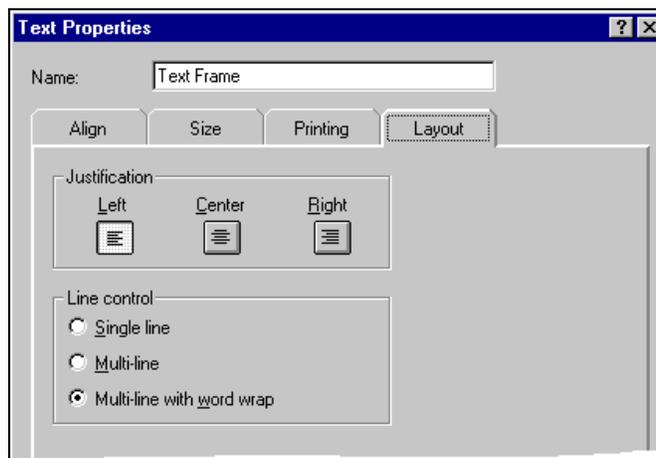
Resizing can be done manually by using the object handles or resizing can be done by specifying exact sizes. The Size tab option of the Properties box is used to specify exact sizes.

- The height and width can be specified to meet specific requirements.
- The text frame can be sized to match the parent frame (Snap to Parent). 
- The text frame can be scanned for best height or selected to have dynamic height.

### Layout

The **Layout** tab formats the text within the text frame.

- The text can be left, center, or right justified within the text frame.
- The line control option controls the numbers of lines in a text frame: single-line, multi-line, or multi-line with word wrap.



## Form Frame

The **Form frame** is a feature for creating a master container into which other frames can be inserted, such as text frames, picture frames, list frames and chart frames.

For example, a usage report utilizing a form frame could be created with the following:

- A picture frame at the top of the form frame with the hospital logo.
- A text frame to describe the report.
- A text frame to indicate the date range of the data.
- A list frame displaying usage detail.
- A chart frame to graphically display the usage information.
- A footer for page numbering.



### To create a form frame:

1. From the menu bar, select **File** and then select **New**.
2. In the New window, select the **Blank** template.
3. **Cancel** the Query box.
4. A blank report is now created.
5. From the **Insert** menu, select **Form Frame**.

*OR...*

Click on the **Form Frame** button .

*THEN...*

6. Draw the size of the form frame.
7. Insert frames as needed to create the desired report.

## Form Properties

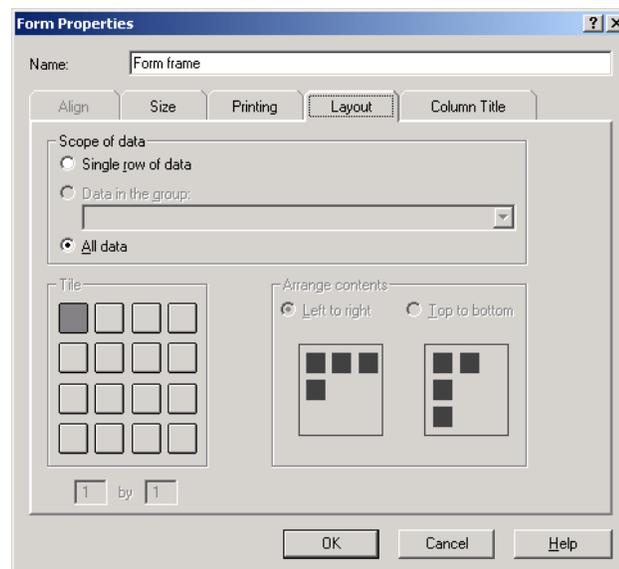
Each **Form frame** has properties: Align, Size, and Layout.



**To access the form frame properties:**

1. Select the entire form frame
2. Right-click and select **Properties**.

The Align and Size tab options allow for the same type of functionality as demonstrated in the other types of frames.



### **Layout**

The layout tab formats the text within the form frame. This box contains two (2) sections:

1. **Scope of Data:**

- **Single Row of Data:** shows a single row of data values from the database in each form as you scroll through the report.
- **Data in Group:** shows all rows of values that are associated with the grouped item, such as a supply name.
- **All Data:** Sets no restrictions on the data values that the form frame can access.

2. **Tiling:** This would primarily be used when printing data on labels where a specific number of form frames must fit exactly within the boundaries of the label sheet.

## Chart Frame

A Chart Frame displays data in a graphical format. Charts are automatically updated when the data changes. Charts are powerful because they can be easily interpreted and allows visual interpretation of trends and exceptions.

Remember: Frames cannot be inserted into Chart Frames; however a Chart Frame can be added to a Form Frame or inserted into List Frame headers or footers. Only data contained by the Parent frame will be displayed.



### To add a Chart Frame:

1. From the menu bar, select **Insert**, then select **Chart Frame**.

*OR...*

Click on the **Chart Frame** button 

*THEN...*

2. Place the cursor where the text frame is desired and draw the frame size.
3. The Chart Properties dialog box is automatically displayed to assist in the completion of the Chart Frame.

### Chart Properties

Each chart frame has properties: Align, Size, Data and Format.



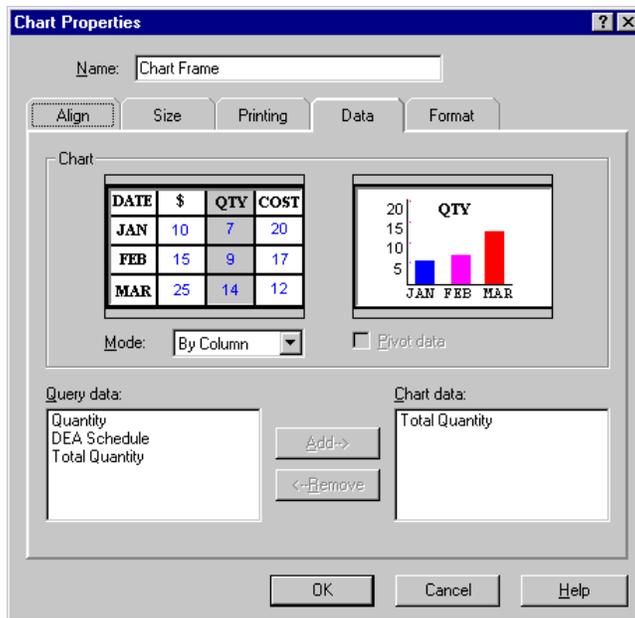
The **Chart Properties dialog box** is automatically displayed when creating a Chart Frame. **To access the Chart Properties dialog box after the Chart Frame has been created:**

1. Select the entire Chart Frame.
2. Right click and select **Properties**.

The Align and Size tab options allow for the same type of functionality as demonstrated in the other types of frames.

## Data

The Data tab option determines what data items to graph in the Chart Frame, and the mode of display. This dialog box is divided into two sections:



- Chart (the upper portion): Data items can be plotted by row or column. This functionality swaps rows and columns to get a look at the data from a different perspective. Before you pivot the data, you need to have at least one grouped data item and more than one item in the Chart Data box.
- Query/Chart Data (lower portion): The numeric values to be charted are assigned in this section.
  - ? All numeric data values used in the report are displayed in the Query Data list box.
  - ? The Chart Data list box displays all numeric data fields to be charted. By default, all numeric data items are listed in the Chart data list box.

**To remove a data item from the Chart Data list box:**

1. Select the data item in the Chart Data list box.
2. Click the **Remove** button.

*OR...*

Double click on the data item in the Chart Data list box.

**To add a data item to the Chart Data list box:**

1. Select the data item in the Query Data list box.
2. Click the **Add** button.

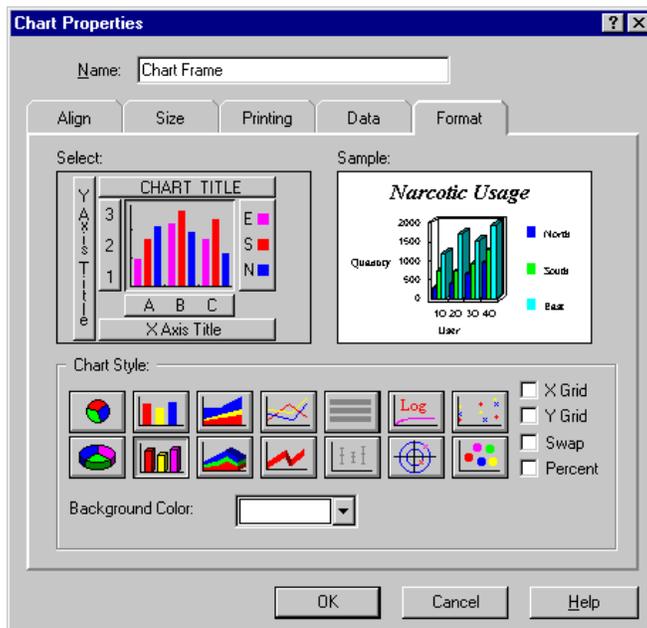
*OR...*

Double-click on the data item in the Query Data list box.

## Format

The Format tab option determines the chart presentation. This dialog box has three sections:

- The Select section allows for labeling and chart customization.
- The Sample window displays the general look of the chart as customization occurs.
- The Chart Style selection determines the type of graph in which the data will be displayed.



### Chart Styles

Examiner offers three types of charts: Bar, Line, and Pie charts.

- Bar and Line charts compare the size of values in relation to axes.
- Pie charts are ratio-based charts that compare the proportion of parts to each other and to the total.

Additional options can be added to the chart selected:

- X Grid: adds vertical lines to the chart that separates X-axis values.
- Y Grid: adds horizontal lines to the chart marking values on the Y axis scale.
- Swap: changes a bar graph with vertical bars to horizontal bars.
- Percent: displays data values as a percentage.

The Chart background color is set by selecting a color from the drop down list. The default color is white.

### Chart Labeling

The Select section of the Format dialog box includes six buttons that customize chart labels.

1. **Chart Title:** Clicking on this button displays a text box to enter the Chart Title. A Font button is provided to choose the font, including size.
2. **Y Axis Title:** Clicking on this button displays a text box in which to enter the label for the Y-axis. A Font button is provided to choose the font, including size.
3. **X Axis Title:** Clicking on this button displays a text box in which to enter the label for the X-axis. A Font button is provided to choose the font, including size.
4. **3 2 1:** Clicking on this button presents the choice of showing the Y labels as Examiner determines or customizing the Y-axis values. A Font button is provided to choose the font, including size.
5. **A B C:** This button represents X-axis values. Clicking on this button displays an option to not display X-axis values. A Font button is provided to choose the font, including size.
6. **E S N:** This button represents the chart legend. Clicking this button displays two options: Display the legend using Examiner selected colors or Customize the legend colors. A Font button is provided to choose the font, including size.

## Picture Frame

A Picture Frame is a holder for graphics. Graphics saved as a bitmap (bmp) or a Device Independent Bitmap (DIB) can be inserted into a picture frame. The picture can be static (hospital logo) or dynamic (a picture specific to a data item).

There are no graphics in the MedSelect database that are associated with data items (such as images of medications to associate with the med name). For this reason, a dynamic picture frame is not supported on MedSelect reports.



### To insert a static Picture Frame to an existing report:

1. From the **Insert** menu, select **Picture Frame**.

*OR...*

Click on the **Picture Frame** button 

*THEN...*

2. Place the cursor where the picture frame is desired and draw the frame size.
3. The Picture Properties dialog box is automatically displayed.
4. Select **Load from file**.
5. Enter the path of the picture or browse for the file.
6. Select **Make a copy within the report**.
7. Select **OK**.



### To modify a picture frame:

1. Select the **Picture Frame**.
2. Right click and select **Properties**.

As with the other frames discussed, alignment and size properties can also be set for a picture frame.

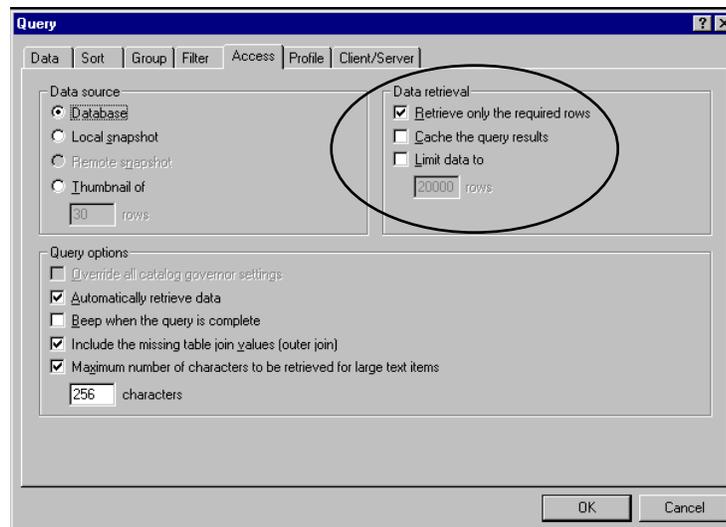
## Database Access Options

### Query Access options

The Access dialog options control the physical connection to the database. This query dialog box consists of three types of options: Data Retrieval, Data Source, and Query Options.

### Data Retrieval

The Data Retrieval options determine how much data is retrieved and stored on the PC.



- **Retrieve only the required rows:** This is the default method of retrieval. This option retrieves a limited number of records at a time (approximately 50-100). When paging down within a report, Examiner retrieves more records from the database.
- **Cache the query results:** The report results are saved in a temporary cache (a special memory subsystem where data will be duplicated for quick access) on the PC.
- **Limit Data to < n >:** This limits the maximum number of records retrieved from the database.



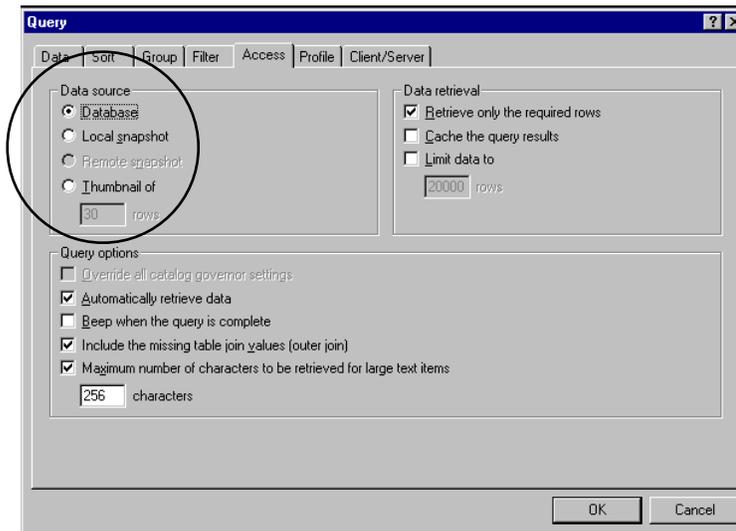
### To access the Access dialog box:

1. From the **Report** menu, select **Query**.
2. Select the **Access** tab option.

## Data Source

The **Query dialog box** (Access tab option) displays three options for the source of data.

- **Database:** By default, queries access data from the database.
- **Local snapshot:** A permanent local copy of the data in the report. When a snapshot report is opened, the report accesses the data in the Snapshot instead of data in the database.
- **Thumbnail of:** A temporary data file that contains a limited number of rows, which is automatically limited to 30 rows. If additional information is needed, Impromptu goes back to the original database to get it.



The advantages of using a Local Snapshot or a Thumbnail include:

- Speed of retrieval.
- Reduction of network traffic.

## Snapshot

A Snapshot is similar to a photograph, in that it captures a picture of the data as it was when the report was created. The data in a Snapshot report can be displayed or manipulated at a later date, without having to connect to the database.

Some features of using a Snapshot include:

- Report data can be accessed and manipulated without a database connection.
- Historical data is static in which it might otherwise be updated or deleted.
- The Snapshot report can be shared with others who may not have access to the database. This is useful if the report is sent via e-mail to someone else in the hospital that may not have access to the database.

Once a report has been created, it can be saved as a Snapshot. A report can be saved as a Snapshot in two ways:

1. From the **File** menu, select **Save As**.
  - Save the report in the Custom Report folder.
  - Check the **Save Snapshot with Report** option in the Save As dialog box.

*OR...*

2. Click on the **Snapshot** button. 

To determine if a report is using a Snapshot or if it is retrieving data from the database, refer to the Status bar in the lower right corner of Impromptu.

- If the report is using a Snapshot, this icon is displayed. 
- If the report is retrieving data from the database, this icon is displayed. 

A Snapshot Timestamp can be added to the Snapshot report. The timestamp indicates the time the snapshot was taken.

Snapshot Time: 08-May-28 22:24:59

The Snapshot time is particularly important if the same report is saved at different points in time as a Snapshot. Since the time is embedded into the report, there is no worry which report is the latest.



**To add a Snapshot Timestamp to a snapshot report:**

1. From the **Insert** menu, select **More Objects**.
2. Select **Snapshot timestamp** from the list box.
3. Click the **Insert** button.
4. Draw the outline of the text frame.

The Snapshot timestamp is inserted.



## **Appendix A**

### **Catalog Folders**





**Department Folder**

	<b>Field Name</b>	<b>Formats</b>	<b>Description</b>
	Department Name		Name of department within the facility.
	Dispense Qty default to 1?		Indicating whether the user must enter the dispense quantity before dispensing, or the value will default to 1. Values "Yes" or "No".
	DT's Auto Logout in Seconds		The number of seconds without activity on a MedSelect Display Terminal before the user is automatically logged out.
	DT's Restock Auto Logout in Seconds		The number of seconds without activity on a MedSelect Display Terminal before the user is automatically logged out during a restock operation.
	Find/Add Patient by ID #?		Indicates to the DT's in this department that a user may perform a find function by Patient ID number. Values "Yes" or "No".
	Hide Patients From Find/Add?		Indicates whether the patient locations associated with this department can be located by another DT. Values "Yes" or "No".
	MedOrder Browser Sort Order Desc.		Indicates to the DT's in this department the default sort order for items on the MedOrder browser. Values " Give time" or "Supply Name".
	# of Leading Dropped Digits		Number indicating the number of leading digits a DT must drop from the user card number when a user logs on via the card reader.
	# of Trailing Dropped Digits		Number indicating the number of trailing digits a DT must drop from the user card number when a user logs on via the card reader.
	Patient Browser Sort Order Desc.		Indicates to the DT's in this department the default sort order on the Patient browser. Values "Patient Name" or "Patient Room".

	Physician Req'd for Dispense?		Indicates that a user must associate a physician with the dispense at the DT. Values "Yes" or "No".
	Reason Req'd for Waste?		Indicates that a user must associate a reason with the wasted event at the DT. Values "Yes" or "No".
	Restock Browser Sort Order Desc.		Indicates to the DT's in this department the default sort order on the Restock browser. Values "Supply Position" or "Supply Name".
	Supply Sort Order Desc.		Indicates to the DT's in this department the default sort order on the Supply, MedOrder and Kit browsers. Values "Trade Name" or "Generic Name".
	Usage Browser Sort Order Desc.		Indicates to the DT's in this department the default sort order for items on the Usage browser. Values "Event Date" or "Supply Name".
	Usage Display Hours		Number of hours of Patient usage information the Display Terminal will display on the Patient Usage browser.
	Witness Req'd for Restock?		Indicates to the DT's in this department that a witness is required for a user to perform the restock function. Values "Yes" or "No".
	Witness Req'd to open a Discrepant Position?		Indicates that a witness is required to open a discrepant position. Values "Yes" or "No".



**Events Folder**

	Field Name	Formats	Description
	Event Unique		Unique number identifying an event within the MedSelect system.
	Cabinet Location Number		The cabinets Location Number that is associated with the event.
	DT's Location Number		The DT's Location Number that is associated with the event.
	DT's Name		The node name of the DT that is associated with the event.

	Event Cabinet Desc.		The Cabinets Description that is associated with the event.
	Event Dispense Group		

	<b>Discrepancies subfolder (Parent folder: Events)</b>		
	Resolution Text		Text description of the resolution to the discrepancy.
	Resolution Flag	Y, Null	Flag set to indicate that resolution text has been entered and the discrepancy has been resolved.
	Discrepant Event		Retrieves all discrepant events.
	Resolution Event		Retrieves all resolution events.
	Resolved Events Only		Retrieves all discrepant events that have been resolved.
	Event Discrepancy Flag	Y, blank	A value of Y indicates that a discrepancy between the User Count Remaining and the System Count Remaining was found during the logging of this event.
	Event Resolution Flag	Y, Null	A value of Y means this event is a resolution event for a discrepancy.

	<b>Date Filter Type: DETAIL ONLY subfolder (Parent folder: Events)</b>		
	Event Date >= Now - 30 Days		Use these filters in the Detail Filter type (Under the Filter Tab - filter options) when there is a need to use Impromptu functions or the pre-defined filters in the subfolder Filter Type: SUMMARY ONLY.
	Event Date >= Now - 60 Days		
	Event Date >= Now - 90 Days		
	Event Date >= Now - 120 Days		
	Event Date >= Now - 150 Days		

	<b>Filter Type: SUMMARY ONLY subfolder (Parent subfolder: Date Filter Type: DETAIL ONLY)</b>
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	<b>Date Ranges subfolder (Parent subfolder: Filter Type: SUMMARY ONLY)</b>	
	Yesterday's Begin Date	<p>You <b>MUST</b> use the above folder <b>Date Filter Type: DETAIL ONLY</b> if you use these predefined dates. Example in the Detail filter put - (Event Date &gt;= Now - 30 Days). Then use these in the SUMMARY Filter Type. Examples: Event Date &gt;= Yesterday's Begin Date and Event Date &lt;= Yesterday's End Date, this will return all events from the previous day.</p>
	Yesterday's End Date	
	Previous 7 Days Begin Date	
	Previous 7 Days End Date	
	Previous Month Begin Date	
	Previous Month End Date	

	<b>1st of each Month subfolder (Parent subfolder : Filter Type: SUMMARY ONLY)</b>	
	Jan. 1 <sup>st</sup> current year	<p>You <b>MUST</b> use the above parent folder <b>Date Filter Type: DETAIL ONLY</b>. Example Run a report in February and in the Detail filter put - (Event Date &gt;= Now - 30 Days). Then in the Summary Filter Type. Examples: (Event Date &gt;= Jan. 1st current year and Event Date &lt; Feb. 1st current year), this will return all events for the month of January of the current year.</p>
	Feb. 1st current year	
	March 1st current year	
	April 1st current year	
	May 1st current year	
	June 1st current year	
	July 1st current year	
	Aug. 1st current year	
	Sept. 1st current year	
	Oct. 1st current year	
	Nov. 1st current year	

	Dec. 1st current year	
	Dec. 1st of last year	

	<b>Quarterly Dates subfolder (Parent subfolder : Filter Type: SUMMARY ONLY)</b>		
	1st Quarter		Retrieves events that occurred in January, February, and March of the current year.
	2nd Quarter		Retrieves events that occurred in April, May and June of the current year.
	3rd Quarter		Retrieves events that occurred in July, August and September of the current year.
	4th Quarter		Retrieves events that occurred in October, November and December of the previous year.
	Q1 Begin Date		You <b>MUST</b> use the subparent folder <b>Date Filter Type: DETAIL ONLY</b> . Example Run a report in January and in the Detail filter put - (Event Date >= Now - 120 Days). In the SUMMARY Filter put the filter - (4th Quarter) and your report will include all events for the 4th Quarter of the previous year. Move the Desired Begin and End Date to the Data Tab to print on the report Header.
	Q1 End Date		
	Q2 Begin Date		
	Q2 End Date		
	Q3 Begin Date		
	Q3 End Date		
	Q4 Begin Date		
	Q4 End Date		

 **Events Folder (continued)**

	Event Date		The date and time that an event occurs.
	Event Post Date		The date and time that an event is written to the database.

	Event Physician Last, First		Combined field consisting of the physician's surname and first name selected from the physician/route/site button on the supply picklist.
	Ordering Physician Last, First		Combined field consisting of the MedOrder physician's surname and first name.
	Quantity		Quantity of the supply effected by the event (e.g. quantity taken, returned, stocked or wasted).
	Reason Desc.		Text describing a facility defined reason for wasting or returning a supply, usually a medication.
	Route Desc.		Text describing the medication administration route (e.g. Apply externally, Intravenous). HL7 defined routes are supplied for the facility, however, the facility may add additional routes.
	Site Desc.		Text describing the administration site (e.g. Left Arm, Buttock). HL7 defined sites are supplied for the facility, however, the facility may add additional sites.

	<b>Status Filters subfolder (Parent folder: Events)</b>		
	Status Key		Unique key identifying a status.
	Cancel Dispense	72	Retrieves Canceled Events.
	Dept. Resolved Charge	38	Retrieves events that indicate a charge imposed to a Department to offset the effects of a quantity discrepancy.
	Dept. Resolve Credit	39	Retrieves events that indicate a credit imposed to a Department to offset the effects of a quantity discrepancy.
	Dept. Return	47	Retrieves events that indicate that a User reported Too Many when dispensing from a UDM and Automatically Returned the unwanted dispenses.

	Expired	13	Retrieves events that indicate that Medication or Supplies were removed from the MedSelect System because their expiration date had passed.
	Open Position	37	Retrieves open position events.
	Patient Resolved Charge	29	Retrieves events that indicate a charge imposed to a Patient to offset the effects of a quantity discrepancy.
	Patient Resolved Credit	19	Retrieves events that indicate a credit imposed to a Patient to offset the effects of a quantity discrepancy.
	Retrieved	18	Retrieves events that indicate that medication or supplies were removed from the return and retrieve positions.
	Return	14	Retrieves events that indicates a credit for a medication that was returned after it was dispensed.
	Return Adjusted	22	Retrieves events that indicate that a Returned event has been transferred to another record. When a transfer occurs, the original Returned event is renamed to Returned Adjusted. This can only happen when the associated Taken event is transferred; A Returned event cannot be transferred by itself.
	Return Transfer In	26	Retrieves events that indicate that this account has received a Returned event that was transferred from another account. There must be a corresponding Taken Transfer In.
	Return Transfer Out	24	Retrieves events that indicate that a Returned event has been transferred from this account to some other account. The account receives a new event called Returned Transfer Out.

	Return Unknown	34	Retrieves events that indicate a credit for a medication that was dispensed Online and the Return occurred Offline. Use the AWS's Account Adjustment to associate this Return with its Taken.
	Stocked	27	Indicates that medication or supplies were Stocked into the MedSelect System.
	Taken	16	Retrieves events that indicate a charge for a medication that was dispensed for a patient.
	Taken Adjusted	12	Retrieves events that indicate that a Taken event has been transferred to another record. The original Taken event is renamed to Taken Adjusted. When a Taken event is transferred, any corresponding Returned or Wasted events will also be transferred.
	Taken Transfer In	25	Retrieves events that indicate that this account has received a Taken event that was transferred from another account. The Taken Transfer in event is a charge to the account.
	Taken Transfer Out	20	Retrieves events that indicate that a Taken event has been transferred from this account to some other account. The Taken Transfer Out credits the account to offset the charge imposed by the original Taken event.
	Taken Unknown	33	Retrieves events that indicate that a Taken event is not associated with a Patient.
	Unload	73	Retrieves events that indicate that a medication or supply was removed from the MedSelect System.
	Wasted	17	Retrieves events that indicate a credit for a medication that was wasted after it was dispensed.

	Wasted Adjusted	21	Retrieves event that indicate that a Wasted event has been transferred to another record. When a transfer occurs, the original Wasted event is renamed to Wasted Adjusted. This can only happen when the associated Taken event is transferred; A Wasted event cannot be transferred by itself.
	Wasted Transfer In	27	Retrieves events that indicate that this account has received a Wasted event that was transferred from another account. There must be a corresponding Taken Transfer In.
	Wasted Transfer Out	23	Retrieves events that indicate that a wasted event has been transferred from this account to some other account. The original account receives a new event called Wasted Transfer Out.
	Wasted Unknown	36	Retrieves events that indicate a credit for a medication that was dispensed Online and the Wasted occurred Offline. Use the AWS's Account Adjustment to associate this Waste with its Taken.



### Events Folder (continued)

	Status Desc.		Text description of an event status.
	Status Desc. w/ Discrepancy Flag		Text description of an event status with "(D)" appended to the text if the event was discrepant.
	Supply Position Desc.		Description of the supply position, e.g. Unit Dose Module 1 Bin 4, Drawer Module 3 Drawer 2 Compartment 12, Cabinet 1 Hook 10, Cabinet 3 Box 1-1.
	Supply Position Desc. for Sorting		Use this field for sorting Supply Position Desc. In Logical order.

	<b>Supply Position Details subfolder (Parent folder: Events)</b>		
	Failed Flag	Y or Null	Indicates a discrepancy occurred during a dispense and the position is Failed.
	Is this Position Failed?		Text description of the Failed FLAG explaining whether a position is failed. Values "Yes" or "No".
	Position Current Qty		The quantity of a supply occupying a specific supply position.
	Position Desc. w/ Failed Flag		Text description of the supply position with "(F)" appended to the text if the supply position is Flagged as Failed.
	Position Lot #		Lot Number to which the medication assigned to the position belongs.
	Position Maximum Qty		The maximum amount of a supply that a facility wants to keep in a particular supply position. The amount reordered is the difference between maximum quantity and the position quantity.
	Position Minimum Qty		The minimum amount of a supply that a facility wants to keep in a particular supply position.
	Position Nearest Expiration Date		Date the medication assigned to the position is to expire.
	Position Return Drawer Flag	I,O or Null	Flag indicating whether a drawer can accept returns. I - accepts returns, O- allows retrieval of returns, Null - does not accept or allow retrieval of returns.
	No Expiration Date		Retrieves positions that do not have a Nearest Expiration Date.
	Past Expiration Date		Retrieves positions whose Nearest Expiration Date has past.
	Position is Failed		Retrieves positions that are Flagged as Failed.
	Quantity is Below Minimum		Retrieves positions whose Current Qty is less than the Positions Minimum Qty.
	Return and Retrieve Positions		Retrieves Return and Retrieve Drawers.

	Position Status = 'A'		Retrieves positions that have not been deleted.
	Supply Position is Counted Med/Supplies		Retrieves all positions that are counted.
	Supply Position is Not Counted Med/Supplies		Retrieves all positions that are not counted. These are SmartStock Par Level positions.



#### Events Folder (continued)

	System Count Remaining		The number of supplies remaining in a compartment as known by the MedSelect system.
	System Dispense Count		The number of supplies dispensed as known by the MedSelect system.
	Unused Amount		The amount of a supply, usually a medication, that was wasted or returned.
	Unused Units		The units of the wasted or returned supply (e.g. ml).
	User Last, First		Combined field consisting of a user's surname and first name.
	Witness Last, First		Combined field consisting of a witness surname and first name.
	User / Witness		Combined field consisting of user surname and first name and the witness surname and first name if required.
	User Count Remaining		The number entered by the user indicating the amount of a supply remaining in a compartment.
	User Dispense Count		The number entered by the user indicating the amount of a supply actually dispensed.

	<b>MedOrder Event Details subfolder (Parent folder: Events)</b>		
	MedOrder Prescribed Date		Date and time a medication is to be administered. This information is provided by the interface.
	MedOrder Number		A facility system assigned number for a medication order.
	MedOrder Frequency		The number of times to administer a medication within a certain period of time.
	MedOrder PRN		Indicates the MedOrder is a PRN. Values "(PRN)" or Null if the order is not a PRN.
	MedOrder Given Late		Retrieves events that indicate that the MedOrder was given past the defined Due Window.

	<b>Centrack Status Filters subfolder (Parent folder: Events) (Centrack Catalog Login ONLY)</b>		
	Status Key		Unique key identifying a status.
	Audit	89	Retrieves events that indicate an audit was performed on the supply position.
	Borrow	86	Retrieves events that indicate medications that were borrowed from an outside facility and deposited in the Pharmacy.
	Deposit	74	Retrieves events that indicate medications have been deposited into the Pharmacy.
	Deposit Compound	90	Retrieves events that indicate compound medications have been deposited into the Pharmacy. Withdraw Ingredient events from the pharmacy are used to create the compound.
	Deposit Unit Package	91	Retrieves events that indicate medications have been deposited into the Pharmacy. Withdraw Bulk events from the pharmacy are separated into Unit Packages for the deposit.
	Expire Pharmacy	77	Retrieves events that indicate medications have been removed from the pharmacy because their expiration date has passed.

	Loan	85	Retrieves events that indicate medications that were removed from the pharmacy and loaned to another facility.
	Quarantine	80	Retrieves events that indicate medications that have been Quarantined and are waiting to be surrendered.
	Recall	79	Retrieves Recall Centrack Events.
	Return Borrow	88	Retrieves events that indicate the return event of a medication that was borrowed from an outside facility.
	Return Loan	87	Retrieves events that indicate medications that have been returned after being loaned to another facility.
	Return Pharmacy	76	Retrieves events that indicate a medication is deposited back into the Pharmacy.
	Sell	84	Retrieves events that indicate medications removed from the pharmacy and sold to another facility.
	Surrender	81	Retrieves Surrender Centrack Events.
	Waste Pharmacy	78	Retrieves events that indicate a medication was wasted at the Pharmacy.
	Withdraw	75	Retrieves events that indicate a medication was removed from the Pharmacy.
	Withdraw Bulk	83	Retrieves events that indicate a medication was removed from the pharmacy inventory to be separated into unit dose packages.
	Withdraw Ingredient	82	Retrieves events that indicate a medication was removed from the pharmacy inventory to be used to make a compound medication.

	<b>Centrack 41, 222 &amp; Paper Tracking Details subfolder (Parent folder: Events) (Centrack Catalog Login ONLY)</b>		
	Form Type	222, 41	i.e. Form 222, Form 41.
	Form -222 Form No:		Number uniquely identifying a form of a given type (i.e. Form 222 Serial Number, Invoice number).
	Form Date		Date/Time the electronic form was prepared.
	Form-41 Package No:		
	Paper T. Control #:		Unique number to identify Paper Tracking events.

	<b>External Facilities subfolder (Parent subfolder: Centrack 41,222 &amp; Paper Tracking Details subfolder) (Centrack Catalog Login ONLY)</b>		
	External Facility use for Grouping		Unique combined field for grouping and sorting.
	Ext. Facility Name		The name of the external medical facility.
	Ext. Address1		First line of facility street address.
	Ext. Address2		Second line of facility street address.
	City, State Zip		Combined field consisting of the External Facilities City, State and Zip Code.
	Ext. City		City where facility resides.
	Ext. State		State where facility resides.
	Ext. Zipcode		Post office zip code for the facility.
	Ext. DEA Registration Number		Unique alphanumeric code which identifies the facility to the DEA.
	Ext. Phone Number		Phone number for the external facility.


**Events In-Transit Folder (Centrack Catalog Login ONLY)**

	Field Name	Formats	Description
	EIT. In-Transit Key		Unique number identifying an In-Transit event within the MedSelect system.
	EIT. Display Terminal or Centrack Terminal		Indicates which application created the In-Transit event. If Centrack created the event, " - Centrack " is appended to the DT name.
	EIT. DT to Restock		DT that is the recipient of the Centrack event.
	EIT. Paper Tracking Control #		The Paper Tracking control #.
	EIT. Status Desc.		Text description of a status of an In-Transit event.
	EIT. Supply Position Desc.		Description of the supply position of the In-Transit event (e.g. Unit Dose Module 1 Bin 4, Drawer Module 3 drawer 2 Compartment 12, Cabinet 1 Hook 10, Cabinet 3 Box 1-1).
	EIT. Logdate from Event Table		The date and time that the In-Transit event occurred.
	EIT. Quantity		Absolute (Quantity) of the supply effected by the In-Transit event.
	EIT. User Last, First		Combined field consisting of the surname and first name of the user that created the In-Transit event.
	EIT. Supply Generic Name, Strength, Size, Units, Form		Combined field containing Supply Generic Name, Strength, Size, Units and Form.
	EIT. DEA 2 Prime Sort		This Field is grouped by DEA 2's. Then the DEA 2's are alphabetical by Generic Name in ascending order, and all other DEA Schedules follow alphabetically by Generic Name in ascending order.
	EIT. DEA Schedule		Text description of EIT. DEA Schedule Key. Values "1", "2", "3", "4", "5", "6", "OTC" and "Legend".

	EIT. DEA Schedule Key	1, 2, 3, 4, 5, 6, 37, 38	A Drug Enforcement Agency defined class of drug. Also MedSelect defined classes, 37 = OTC and 38 = Legend.
	EIT. Unique Generic		Unique Combined field for grouping and sorting by Generic Name.
	EIT. Paper Tracking Only		Retrieve paper tracking events only.



**Facility Folder**

	Field Name	Formats	Description
	AWS timeout		The number of seconds without activity on an AWS Before the user is automatically Logged out.
	Card Swipe Req'd?		Indicates to the DT's that a user card must be used to log on to the DT. Values "Yes" or "No".
	Card Swipe Flag	Y, Null	Flag indicating to the DT's that a user card must be used to log on to the DT.
	Database Version		Alphanumeric value indicating the database version.
	DEA Registration #		Alphanumeric code which identifies the facility to the DEA.
	Display Closed Visits?		Indicates whether the DT's should display closed visits during a find/add operation. Values "Yes" or "No".
	Display Closed Visits Flag	1, 0	Flag indicating whether the DT should display closed visits during a find/add operation. 1 - Yes, 0 - No.
	Facility Name		The name of the medical facility.
	MedOrder Due Window		The delta time surrounding a medication order give time in which the dose is considered to be due.
	MedOrder Due Late Window		After the lateWindow delta time has passed, the medication will no longer be displayed in the GiveSchedule Browser at the DT.

	Number of Login tries	0 - 9	The number of consecutive times a user can unsuccessfully login before the user's account is made inactive. Zero indicates unlimited login tries.
	Report Date Criteria		Indicates the number of days previous to today that should be displayed on all reports.
	Software Version Number		A number that uniquely identifies a release of the MedSelect Dispensing System software, e.g. V2.3.
	System MedOrder Override	Datetime or Null	This field stores the date and time the MedOrder interface went down, or is no longer receiving MedOrders. This date must be set by a user at the AWS. Setting this date allows all MedOrder required medications to be dispensed without a MedOrder.



### Patient and Visit Folder

	Field Name	Formats	Description
	External System ID		Unique Identifier for a patient to an external hospital system.
	External Patient ID		Unique patient identifier to an external hospital system.
	Medical Record Number		A facility assigned number associated with a patient's facility records.
	Patient Allergies		A list of known patient allergies to drugs.
	Patient Created by Desc.		Indicates which application created the visit record. Values "AWS", "Display Terminal" and "Interface".
	Patient Gender	M, F, O, U	Male, Female, Other, Unknown
	Patient ID #		A number assigned by the facility to uniquely identify a patient.
	Patient Last, First		Combined field consisting of a patient's surname and first name.

	Unique Patient Name (Use for Grouping)		Use this field to group and sort a report by patient name. Will prevent patients with the same name, e.g. John Smith's from being grouped together.
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	<b>Visit subfolder (Parent folder: Patient and Visit)</b>		
	Admission Date		The date and time the patient was admitted to the facility.
	Admission Height		The patient's height at the time of admission.
	Admission Weight		The patient's weight at the time of admission.
	Admitting Physician Last, First		Combined field consisting of an admitting physician surname and first name.
	Admitting User Last, First		Combined field consisting of a user surname and first name that is logged in to the MedSelect System, who last changed the status of this visit.
	Discharge Date		The date and time that a patient is discharged from the facility.
	External Account #		Unique identifier representing a patient billing account within the hospital.
	Patient Bed #		A value that distinguishes each bed in a location.
	Patient Class Desc.		Text description that indicates how a patient was admitted into the facility. Values "In-Patient", "Out-Patient", "Emergency", "Pre-Admit" and "Re-Occurring".
	Patient Room/Bed		Combined field of the patients room and bed #.
	Patient Room #		A patient's location, or room, to the MedSelect system.
	Visit Close Date		The date and time that a visit record is closed.
	Visit Created By Desc.		Indicates which application created the visit. Values "AWS", "Display Terminal" and "Interface".

	Visit Closed By Desc.		Indicates which application closed the visit. Values "AWS", "Display Terminal" and "Interface".
	Visit #		Unique number assigned by the facility for a patient visit.
	Visit Status Desc.		The current status of a visit at a point in time. Values "Open", "On-Hold", and "Closed".
	Open Visits		Retrieves patients with Open Visits.
	On-Hold Visits		Retrieves patients with On-Hold Visits.
	Closed Visits		Retrieves patients with Closed Visit.

	<b>Patient Class Filters subfolder (Parent folder: Patient and Visit)</b>		
	Patient Class	I, O, E, P, R	How a patient was admitted into the facility, e.g. I = in-patient, O = out patient, E = emergency, P = pre-admit and R = Reoccurring.
	In-Patient		Retrieves visits that are classified as In-Patient.
	Emergency		Retrieves visits that are classified as Emergency.
	Out-Patient		Retrieves visits that are classified as Out-Patient.
	Re-Occurring		Retrieves visits that are classified as Re-Occurring.
	Pre-Admit		Retrieves visits that are classified as Pre-Admit.

	<b>Visit Created by Filters subfolder (Parent folder: Patient and Visit)</b>		
	Visit Created By	A, D, I	Code indicating which application in the MedSelect System created the visit record, e.g. A- AWS, D- Display Terminal or I-Interface.
	Created By AWS		Retrieves visits that were added to the MedSelect System via the AWS.
	Created By DT		Retrieves visits that were added to the MedSelect System via the Display Terminal.
	Created By Interface		Retrieves visits that were added to the MedSelect System via the Interface.

	<b>Visit Closed By Filters subfolder (Parent folder: Patient and Visit)</b>		
	Visit Closed By	A, D, I,	Code indicating which application in the MedSelect System closed the visit record, e.g. A- AWS, D- Display Terminal or I-Interface.
	Closed By AWS		Retrieves visits that were closed via the AWS.
	Closed By (Close Old Visits)		Retrieves visits that were closed via the Close Old Visits procedure.
	Closed By Interface		Retrieves visits that were closed via the Interface.

	<b>Patient Details subfolder (Parent folder: Patient and Visit)</b>		
	Patient Name Prefix		Titles, such as Dr., Mr., Ms., etc.
	Patient First		A patient's first name or initial.
	Patient Middle		The patient's middle name or initial.
	Patient Last		A patient's surname.
	Patient Name Suffix		Descriptors that would normally follow a name, such as Jr., III, Md., Ph.D., etc.
	Patient Upper Last		The patient's surname in capital letters.
	Patient Upper First		The patient's first name in capital letters.
	Patient Address 1		First line of patient street address.

Patient Address 2	Second line of patient street address.
Patient City	City where patient resides.
Patient State	State where patient resides.
Patient Zip	Post office zip code for the patient's residence.
Patient Country	Country where patient lives.
Patient Home Phone #	Patient's home telephone number.
Patient Birth Date	The date the patient was born.



### Physicians Folder

Field Name	Formats	Description
Physician Code		Unique facility defined code for identifying a physician.
 Physician Last, First		Combined field consisting of a physician's surname and first name.
 Physician Name and Code Unique Grouping		Use this field for grouping and sorting a report by physician name. Will prevent physicians with the same name, e.g. John Smith's from being grouped together.
Physician First		The first name or initial of a physician at the facility.
Physician Last		A physician's surname.
Physician Middle		A physician's middle name or initial.
Physician Name Prefix		Titles, such as Dr., Mr., Ms., etc.
Physician Name Suffix		Descriptors that would normally follow a name, such as Jr., III, Md., Ph.D., etc.
Physician Preferences		Text describing any preferences a physician may have while performing a procedure, e.g. music, glove size, etc.
Physician Unique		Unique number identifying a physician within the MedSelect system.



## Supplies Folder

	Field Name	Formats	Description
	Accept MedOrders		Text description of supply option which indicates whether MedSelect should accept MedOrders for this supply. Values "Yes" or "No".
	Count Remaining Req'd		Text Description of supply option which indicates whether the positions contents must be recounted every time a supply is taken (dispensed) or returned to the MedSelect. Values "Yes" or "No".
	Count Remaining Req'd Centrack (Centrack Catalog Login Only)		Text description of Centrack supply option which indicates whether the supply must be recounted every time a supply is taken from or returned to the Centrack System. Values "Yes" or "No".
	DEA 2 Prime Sort		This Field is grouped by DEA 2's. Then the DEA 2's are alphabetical by Generic Name in ascending order, and all other DEA Schedules follow alphabetically by Generic Name in ascending order.
	DEA Schedule		Text description of DEA Schedule Key. Values "1", "2", "3", "4", "5", "6", "OTC" and "Legend".
	DEA Schedule Key	1, 2, 3, 4, 5, 6, 37, 38	A Drug Enforcement Agency defined class of drug. Also MedSelect defined classes, 37 = OTC, 38 = Legend.
	Defined Class Desc.		Facility defined class associated with this supply.
	Manufacturer Part #		The number assigned by a manufacturer to identify a supply.
	MedOrder Req'd to Dispense		A customer option that indicates that a medication must be in the Patient's MedOrder profile before it can be dispensed. Values "Yes" or "No".

	Returned to Original Drawer		Indicates whether this supply is to be returned to its original drawer rather than to the return drawer. This only applies to supplies assigned to non-UDM positions. Values "Yes" or "No".
	Send to Billing Interface		Indicates whether dispenses of this supply should be sent to the billing interface. Values "Yes" or "No".
	Supply Charge Code		Facility code used for billing a supply.
	Supply Cost		The latest cost of a particular supply.
	Supply Unique Key		Unique Supply Key field for grouping.
	Supply Generic Name		The non-trademark name for a supply or the chemical name for a medicine.
	Supply Generic Name, Strength, Size, Units, Form		Combined field containing Supply Generic Name, Strength, Size, Units and Form.
	Supply NDC Code		National Drug Code (NDC) is a pharmacy defined code for specifying medications.
	Supply Pharmacy Location		Description of a location within the pharmacy where medication is located.
	Supply Generic & Item for Sort Group		Unique combined field for grouping and sorting by Generic Name.
	Supply Trade & Item for Sort Group		Unique combined field for grouping and sorting by Trade Name.
	Supply Trade Name		The proprietary name protected by US trademark for a supply.
	Supply Vendor #		Number assigned by the facility which uniquely identifies the vendor of a supply.
	System Current Qty		The actual quantity of this supply currently being stored by MedSelect.
	System Maximum Qty		The maximum quantity of this supply that should be in stock. Maximum quantities prevent over-stocking.
	System Minimum Qty		The minimum quantity of a supply that a facility wants to keep in inventory. The supply should be re-ordered when minimum is reached.

	Waste Witness Req'd		A customer option that indicates that a second user must login to witness the wasting of a supply, usually a controlled medication. Values "Yes" or "No".
	Centrack Supplies Only (Centrack Catalog Login ONLY)		Retrieves supplies that are stocked in the Centrack Vault.

	<b>Supply Details subfolder (Parent folder Supplies)</b>		
	Item Code		The number assigned by the facility to uniquely identify a supply. For medications, this is the facility formulary number.
	Supply Form		The form of the substance (e.g. capsule or tablet).
	Supply Size		The per unit amount of a supply (e.g. 400 units).
	Supply Size Units		The measurement used with a supply size, e.g. mg, ml, etc.
	Supply Size and Size Units		Combined field containing Supply Size & Supply Size Units.
	Supply Strength		Application strength of the prescribed med.

	<b>Supply Flags subfolder (Parent folder Supplies)</b>		
	Accept MedOrders Flag	A, I	Used for a MedOrder interface to indicate whether MedSelect should accept MedOrders for this supply. A - Yes, I - No.
	Bill Flag	B, N	Character indicating whether supply is billable or nonbillable. B - billable, N - nonbillable.
	Count Remaining Req'd Flag	Y, N	Flag indicating that the supply must be recounted every time a supply is taken or returned. Y - Yes, N - No.
	MedOrder Req'd Flag	Y, N	A customer option that indicates that a medication must be in the Patient's profile before it can be dispensed. Y - Yes, N - No.

	Centrack Count Remaining Req'd Flag (Centrack Catalog Login ONLY)	Y, Null	Flag indicating that the supply must be recounted every time a supply is taken from or returned to the pharmacy. Y - Yes, Null - No.
	Return Meds to Original Drawer Flag	Y, N	Flag indicating whether this supply can be returned to its original drawer rather than to the return drawer. This flag does not apply to UDM's. Y - Yes, N - No.
	Waste Witness Req'd Flag	Y, N	A customer option that indicates that a second user must login to witness the wasting of a supply, usually a controlled medication. Y - Yes, N - No.



### Users Folder

	Field Name	Formats	Description
	Access Description		Text Description of the User's Access rights.
	User Login Name		A name that defines a user uniquely to the MedSelect system.
	Created by User Last, First		Combined field consisting of the surname and first name of user that created the account.
	Profile Description		Text description of the profile (i.e. RN, LPN, Administrator).
	User Card #		The number required to log in to a Display Terminal. The number may be encoded on a magnetic or bar coded card.
	User Disabled Login Flag	0-9, Y	A value of Y indicates that this user account is no longer an active account, therefore the user may not login to either the AWS or the DT. A numeric value indicates the number of consecutive times this user has tried to login and has failed.
	User Last, First		Combined field consisting of a user's surname and first name.
	User First Name		The first name or initial of an authorized user of a MedSelect system.

	User Last Name		The surname of an authorized user of a MedSelect system.
	User Middle Name		The middle name or initial of an authorized user of a MedSelect system.
	User Name Prefix		Titles, such as Dr., Mr., Ms., etc.
	User Name Suffix		Descriptors that would normally follow a name, such as Jr., III. MD., Ph.D., etc.
	User Status	A, I	Flag indicating whether the user has been marked as deleted in the system. Inactive users are retained in the system for reporting reasons only. A - Active, I - Inactive
	Current Users		Retrieves all users that have not been deleted from the MedSelect System.
	Disabled Users		Retrieves all users that have their login access disabled.
	Deleted Users		Retrieves all users that have been deleted. For data integrity users are not physically deleted if they have events associated with them.
	Centrack Users (Centrack Catalog Login ONLY)		Retrieves all users with the following access rights: Centrack Discrepancy Resolution, Centrack Audit, Centrack Witness or Centrack Login.

	<b>User by Department subfolder (Parent folder Users)</b>		
	Department Expiration Date		The date and time the user account will expire preventing access to the MedSelect systems in this department.

	<b>Witness Name subfolder (Parent folder Users)</b>		
	User / Witness		Combined field consisting of user surname and first name and the witness surname and first name.
	Witness First Name		First name of the user who logged in as a witness.
	Witness Last Name		Surname of the user who logged in as a witness.
	Witness Last, First		Combined field consisting of the witness surname and first name.
	Witness Middle Name		Witness's middle name or initial.
	Witness Name Prefix		Witness's title, such as Dr., Mr., Ms., etc.
	Witness Name Suffix		Witness's title descriptors that would normally follow a name, such as Jr., III. MD., Ph.D., etc.



**Prompts Folder**

	<b>Field Name &amp; Prompts</b>	<b>Formats</b>	<b>Filter Examples</b>
	Begin Range Date		Event Date >= Begin Range Date and Event Date <= End Range Date
	End Range Date		
	Expiration Date Prompt		Pos. Nearest Expiration Date <= Expiration Date Prompt
	Visit Created By		decode ( Visit Created By , 'A' , 'AWS' , 'D' , 'Display Terminal' , 'I' , 'Interface ) = ( Visit Created By: )
	Visit Created By:		

	<b>Cabinet Location subfolder (Parent folder Prompts)</b>		
	Cabinet Location Prompt Key		Cabinet Location Prompt Key in (Cabinet Locations) or Cabinet Location Prompt Key = (Cabinet Locations)
	Cabinet Locations		

	<b>Display Terminal's Location subfolder (Parent folder Prompts)</b>		
	DT's Location Prompt Key		DT's Location Prompt Key in (DT's Location) or DT's Location Prompt Key = (DT's Location)
	DT's Location		

	<b>Patient Usage Report subfolder (Parent folder Prompts)</b>		
	Patient ID #		This prompt asks for a Patient ID # and then creates a report that lists all visits for the typed in ID #. Patient ID # = Patient ID Type In:
	Patient ID Type In:		
	Patient Usage Prompt Key		This prompt uses the above patient/visit list (see cascading prompts in the online Help). Patient Usage Prompt Key = Patient and Visit Picklist.
	Patient and Visit Picklist		

	<b>Physician Usage Picklist subfolder (Parent folder Prompts)</b>		
	Physician Usage Prompt Key		Physician Usage Prompt Key in (Physician Picklist) or Physician Usage Prompt Key = (Physician Picklist)
	Physician Picklist		

	<b>Staff Names subfolder (Parent folder Prompts)</b>		
	Staff Prompt Key		Staff Prompt Key in (Current Staff) or Staff Prompt Key = (Current Staff)
	Current Staff		

	<b>Supply Generic Name subfolder (Parent folder Prompts)</b>		
	This prompt may be used for Inventory or Usage reports.		
	Supply Prompt Key		
	Supply Generic Name		Supply Prompt Key in (Supply Generic Name) - Lists all Supplies.
	DEA Generic Supply List		Supply Prompt Key in (DEA Generic Supply List) - Lists all DEA Supplies.



**Prompts for Centrack (Centrack Catalog Login ONLY)**

	<b>Field Name &amp; Prompts</b>	<b>Formats</b>	<b>Filter Examples</b>
	Inv. DEA Schedule Key		Use this key to prompt the user for the DEA Schedule for Inventory Reports.
	DEA Schedule Key		Use this key to prompt the user for the DEA Schedule for Usage Reports.
	DEA Picklist		Inv. DEA Schedule Key in ( DEA picklist) or DEA Schedule Key in ( DEA picklist )
	All or Just Those Supplies		All or Just Those Supplies = 'ALL' or Centrack Supply Prompt Key in ( Centrack supply Picklist )
	All or Just Those Locations		All or Just Those Locations = 'ALL' or Cabinet Location Prompt Key in (Cabinet Locations)
	Centrack Users Prompt Key		
	Centrack Users		Centrack Users Prompt Key in (Centrack Users)
	Centrack Supply Prompt Key		
	Centrack Supply Picklist		Centrack Supply Prompt Key in (Centrack Supply Picklist)



**Stay within: Controlled Substance Archive**

This folder enables the user to view all Controlled Substance activity that have occurred during the past 3 years. Using the data in the events folder only permits the viewing of 1 year of activity. Reports should not be built using this folder if the desired data is within 1 year.

Field Name	Formats	Description
Narcotics Patient ID #		A number assigned by the facility to uniquely identify a patient.
 Narcotics Patient Last, First		Combined field consisting of a patient's surname and first name.
Narcotics Patient Room #		Location in which the patient resides.
Narcotics Patient Bed #		A value which distinguishes each location within a room.
Narcotics Item Code		The number assigned by the facility (at the time the event was written to the database) to uniquely identify a supply. For medications, this is the facility formulary number.
Narcotics Trade Name		The proprietary name protected by US Trademark for a supply.
Narcotics Generic Name		The non-tradename for a supply or the chemical name for a medicine.
 Narcotics Generic Name, Strength, Size, Units		Combined field consisting of Supply Generic Name, Strength, Size and Units.
Narcotics Supply Size		The per unit amount of a supply (e.g. 400 units).
Narcotics Supply Units		The measurement used with a dose size.
Narcotics Supply Size and Size Units		Combined field consisting of Supply Size and Size Units.
Narcotics Supply Strength		Application Strength of the prescribed medication.
Narcotics DEA Schedule	1, 2, 3, 4, 5	A Drug Enforcement Agency defined class of drug.
Narcotics Defined Class Desc.		Text describing the customer defined class assigned to this medication.
Narcotics Event Date		The date and time the event occurred.

	Narcotics Qty		Quantity of the supply effected by the event. (e.g. quantity taken, returned, stocked or wasted).
	Narcotics Event Status Desc.		Text describing the status of the event (ie: Taken, Returned).
	Narcotics Supply Position Desc.		Description of the supply position where the narcotic was dispensed. This description includes the name of the cabinet and the location of the supply within the cabinet.
	Narcotic User Last, First		Combined field consisting of a user's surname and first name.
	Narcotics Physician Last, First		Combined field consisting of the ordering physician's surname and first name.
	Narcotics Witness Last, First		Combined field consisting of the witness's surname and first name.
	Narcotics Unique Generic Name		Unique Combined field for grouping and sorting by Generic Name.
	Narcotic Unique		Unique key field for grouping.



### Stay within: Kits

	Field Name	Formats	Description
	Kit Name		A name that describes the group of supplies (e.g. Gall Bladder kit).
	Kit Department Name		This field determines on which DT's the kit will be displayed.
	Kit Most Restrictive DEA		This field contains the most restricted DEA of all the supplies that are contained within the kit.
	Kit Supply Generic Name, Strength, Size, Units, Form		Combined field consisting of Generic Name, Strength, Size, Units and Form.
	Kit Supply Trade Name		The proprietary name protected by US Trademark for a supply.
	Kit Supply Size and Size Units		Combined field consisting of Supply Size and Size Units.
	Kit Supply Strength		Application strength of the prescribed med.
	Kit Supply DEA Schedule		Values "1", "2", "3", "4", "5", "6", "OTC" and "Legend".

	Kit Defined Class Desc.		Text describing the customer defined class assigned to this medication.
	Kit Supply Kit Qty		Quantity of a dose of a specific supply to be included in the kit.



**Stay within: MedOrders**

<b>M.O. Details subfolder (Parent folder Stay within: MedOrders)</b>			
	<b>Field Name</b>	<b>Formats</b>	<b>Description</b>
	M.O. Admin as Needed or Prescribed		Values "Administer as needed" or "Administer as prescribed".
	M.O. Admin as Needed or Prescribed Flag	Y,N	"Y" indicates that the medication is administered to the patient as needed. A value of "N" means that the medication is "straight", meaning that it is administered as prescribed.
	M.O. Comments		Comments supplied by the pharmacist about a medication order.
	M.O. IV Type		Values "IV", "SVP", "LVP" or Blank if it is not any type.
	M.O. IV Rate		Amount and Units per time.
	M.O. Frequency	Default to 1	The number of times to administer a medication within a certain period of time.
	M.O. MedOrder #		A facility system assigned number for a medication order.
	M.O. Medication Start Date		The date and time that a medication order begins.
	M.O. Medication Stop Date		The date and time that a medication order ends.
	M.O. Needs Human Review?		Values "Yes" or "No".
	M.O. Needs Human Review Flag	Y,N	Flag indicating that the MedOrder should be reviewed for special instructions before the medication is administered.
	M.O. Ordering Physician Last, First		Combined field consisting of ordering physician's surname and first name.

	M.O. Order Place Date		The date and time the physician wrote the medication order.
	M.O. Order Receive Date		The date and time the MedSelect system received the medication order from an interface.
	M.O. Pharmacy Checked		Text indicating that the medication order has been checked by a Pharmacist. This field may contain a name or ID to identify the person who approved the order.
	M.O. Prescribed Route Desc.		Text describing the medication administration route, prescribed by the ordering physician (e.g. Apply externally, Intravenous).
	M.O. Special Instructions		Any special instructions to be displayed for this MedOrder.
	M.O. Status Desc.		Text describing the status of the medication order (for example: Cancelled; Completed; Discontinued; Not Found; On Hold; In-Progress, Unspecified; Replaced; In-Progress, Scheduled).

	<b>M.O. Status Filters subfolder (Parent folder M.O. Details)</b>		
	M.O. Status Key		Unique key identifying the MedOrder status.
	M.O. Cancelled	4	Retrieves all Cancelled MedOrders.
	M.O. Completed	5	Retrieves all Completed MedOrders.
	M.O. Discontinued	6	Retrieves all Discontinued MedOrders.
	M.O. In-Progress, Scheduled	11	Retrieves all MedOrders with Give Schedules.
	M.O. In-Progress, Unspecified	9	Retrieves all PRN MedOrders.
	M.O. Not Found	7	Retrieves all Not Found MedOrders.
	M.O. On-Hold Scheduled	8	Retrieves all MedOrders with Give Schedules that are On-Hold.
	M.O. On-Hold Unspecified	46	Retrieves all PRN MedOrders that are On-Hold.
	M.O. Replaced	10	Retrieves all Replaced MedOrders.

	<b>M.O. IV Type Filters subfolder (Parent folder M.O. Details)</b>		
	M.O. IV Type Flag	I,S,L,Null	Flag indicating whether the medication order is for an IV or Piggyback. (I - IV, S - SAP, L - LVP, Null - not an IV).
	M.O. IV	I	Retrieves all IV type "IV".
	M.O. LVP	L	Retrieves all IV type "LVP".
	M.O. SVP	S	Retrieves all IV type "SVP".
	M.O. Not an IV	Null	Retrieves all Non IV types.

	<b>M.O. Give Schedule (Parent folder Stay within: MedOrders)</b>		
	M.O. Prescribed Date		Date and time a medication is to be administered. This information is provided by the interface.
	M.O. Dispensed Event Date		The date and time that the MedOrder event occurs.
	M.O. Give Status Desc.		Values "Given", "Given Late", "Not Given", "Dismissed", "Due", "Not Due" or "Missed".
	M.O. Give Status	G, Blank, L, D	Single character indicating the status of the give schedule (i.e. G=given, Blank=not given, L=Late, D = Dismissed).
	M.O. Given User Last, First		Combined field consisting of user's surname and first name.
	M.O. Dismiss User Last, First		Combined field consisting of user's surname and first name that dismissed the give schedule.
	M.O. Dismiss Reason Desc.		Text description of reason given for dismissing the give schedule.
	M.O. Dismissed	D	Retrieves all MedOrders that were Dismissed (MedOrders that were removed from the DT screen).
	M.O. Due	Calculated	Retrieves all MedOrders whose prescribed time is currently within the Due Window.

	M.O. Given Late	L	Retrieves all MedOrders that were Given Past the Due Window.
	M.O. Given within Due Window	G	Retrieves all MedOrders that were given within the due window.
	M.O. Missed	Calculated	Retrieves all MedOrders whose prescribed time is past the due late window.
	M.O. Not Due	Calculated	Retrieves all MedOrders whose prescribed date is before the due window (will not be visible at the DT).

	<b>M.O. Due Window (Parent folder M.O. Give Schedule)</b>		
	M.O. Due Window		The delta time surrounding a medication order give time in which the dose is considered to be due.
	M.O. Due Late Window		The delta time after the medication give time in which the medications can be dispensed but will be marked late. After the lateWindow delta time has passed, the medication will no longer be displayed in the GiveSchedule Browser at the DT.
	Due_Grace_Interval		Calculated fields used to determine whether a MedOrder is Due, Missed or Late.
	Due_Late_Grace_Interval		
	Start of Due Window		
	End of Due Window		
	Start of Due Late Window		
	End of Due Late Window		

	<b>M.O. Patient and Visit Information (Parent folder Stay within: MedOrders)</b>		
	M.O. Admission Height		The patient's weight at the time of admission.
	M.O. Admission Weight		The patient's height at the time of admission.
	M.O. Bed #		A value that distinguishes each bed in a location.

	M.O. Last Name Patient ID# Unique		Combined field of the patient's surname and ID#. Use when grouping and sorting by patient's surname.
	M.O. Medical Record Number		A facility assigned number associated with a patient's facility records.
	M.O. Patient Age		The patient's age.
	M.O. Patient Allergies		A list of known patient allergies to drugs.
	M.O. Patient Birth Date		The date the patient was born.
	M.O. Patient Class	I, O, E, P, R	How a patient was admitted into the facility (e.g. I- in-patient, O - out patient, E-emergency, P - pre-admit, R - Reoccurring).
	M.O. Patient Class Desc.		Text description of M.O. Patient Class. Values "In-Patient", "Out-Patient", "Emergency", "Pre-Admit", Re-Occurring.
	M.O. Patient Created by Desc.		Indicates which application created the visit record. Values "AWS", "Display Terminal" or "Interface".
	M.O. Patient Gender	M, F, O, U	Male, Female, Other and Unknown.
	M.O. Patient ID#		A number assigned by the facility to uniquely identify a patient.
	M.O. Patient Last, First		A patient's surname and first name.
	M.O. Patient Room/Bed		Combined field of the patients room and bed #.
	M.O. Patient Room Number		A patient's location or room, to the MedSelect system.
	M.O. Unique Patient		Unique patient field for grouping.
	M.O. Visit #		Unique number assigned by the facility for a patient visit.
	M.O. Visit Status Desc.		The current status of a visit at a point in time. Values "Open", "On-Hold", and "Closed".

	<b>M.O. Visit Status Filters (Parent folder M.O. Patient and Visit Information)</b>		
	M.O. Visit Status		Unique key identifying the MedOrder status.
	M.O. Open Visits	1	Retrieves all patients with Open Visits.

	M.O. On-Hold Visits	2	Retrieves all patients with On-Hold Visits.
	M.O. Closed Visit	3	Retrieves all patients with Closed Visits.

	<b>M.O. Supply (Parent folder Stay within: MedOrders)</b>		
	M.O. Item Code		The number assigned by the facility to uniquely identify a supply. For medications, this is the facility formulary number.
	M.O. Supply Generic Name, Strength, Size, Units, Form		Combined field consisting of Supply Generic Name, Strength, Size, Size Units and Form.
	M.O. Supply Trade Name		The proprietary name protected by US trademark for a supply.
	M.O. Supply Size and Size Units		Combined field consisting of Supply Size and Size Units.
	M.O. Dose to Administer		Dose and Dose Units or the Min and Max Range.
	M.O. Dose		Amount of a medicinal preparation to be administered at one time.
	M.O. Dose Units		The measurement used with a dose size (e.g. mg, ml, etc).
	M.O. Dispense Qty		Quantity of a dose prescribed by the ordering Physician. If the quantity is a range then the interface will set the quantity value to 0 and populate the MinQuantity and MaxQuantity fields.
	M.O. Ordered Supply Form		The form of a substance (e.g. capsule or tablet).
	M.O. Volume		The total amount of a solution in which a dose is contained
	M.O. Volume Units		The units associated with the solution in which a dose is contained.
	M.O. Min Range Qty		For range orders, this field will hold the minimum value in the range.
	M.O. Max Range Qty		For range orders, this field will hold the maximum value in the range.

	<b>M.O. Supply Details (Parent folder M.O. Supply)</b>		
	M.O. DEA Schedule		Values "1", "2", "3", "4", "5", "6", "OTC" and "Legend"
	M.O. Defined Class Desc.		Facility defined class associated with this supply.
	M.O. Supply Cost		The latest cost of a particular supply.
	M.O. Supply Form		The form of the substance (e.g. capsule or tablet).
	M.O. Supply Generic Name		The non-trademark name for a supply or the chemical name for a medicine.
	M.O. Supply Size		The per unit amount of a supply (e.g. 400 units).
	M.O. Supply Size Units		The measurement used with a supply size (e.g. mg, ml, etc).
	M.O. Supply Strength		Application strength of the prescribed med.

 <b>M.O. Prompts (Parent folder Stay within: MedOrders)</b>			
	<b>Field Name &amp; Prompts</b>	<b>Formats</b>	<b>Filter Examples</b>
	M.O. Earliest Give Time Prompt Key		M.O. Earliest Give Time >= M.O. Earliest Give Time.
	M.O. Earliest Give Time		
	M.O. Status Prompt Key		M.O. Status Prompt Key in ( M.O. Status Prompt Key).
	M.O. Status		
	M.O. Visit Status Prompt Key		M.O. Visit Status = ( M.O. Visit Status).
	M.O. Visit Status		
	M.O. Medication Stop Date Prompt Key		M.O. Medication Stop Date Prompt Key >= M.O. Earliest Stop Date and M.O. Medication Stop Date Prompt Key <= M.O. Latest Stop Date.
	M.O. Earliest Stop Date		
	M.O. Latest Stop Date		



**Stay within: Return Drawers Contents**

	<b>Field Name</b>	<b>Formats</b>	<b>Description</b>
	Return Cabinet Description		The Cabinets Description that is associated with the return drawer.
	Return Cabinet Location Number		The Cabinets Location Number that is associated with the return drawer.
	Return Supply Trade Name		The proprietary name protected by US trademark for a supply.
	Return Supply Generic Name, Strength, Size, Units, Form		Combined field consisting of Supply Generic Name, Strength, Size, Size Units and Form.
	Return Unique Generic and Item Code (Use for Grouping)		Unique Combined field for grouping and sorting by Generic Name.
	Return Supply Generic Name		The non-trademark name for a supply or the chemical name for a medicine.

	Return Item Code		The number assigned by the facility to uniquely identify a supply. For medications, this is the facility formulary number.
	Return Supply Size and Size Units		Combined field containing Supply Size & Supply Size Units.
	Return Supply Size		The per unit amount of a supply (e.g. 400 units).
	Return Supply Size Units		The measurement used with a supply size (e.g. mg, ml, etc).
	Return Supply Strength		Application strength of the prescribed med.
	Return Supply Form		The form of the substance. (e.g. capsule or tablet)
	Return DEA Schedule		Values "1", "2", "3", "4", "5", "6", "OTC" and "Legend"
	Return Defined Class Description		Facility defined class associated with this supply.
	Return Date		Date and time the supply was placed in the return drawer.
	Return Quantity		Amount of a supply returned.
	Return by User Last, First		Combined field consisting of returning user's surname and first name.
	Return User First Name		The first name or initial of the return user of a MedSelect system.
	Return User Last Name		The surname of the return user of a MedSelect system.



### Stay within: Supply Inventory

 <b>Pos. Supply Assignments subfolder (Parent folder Stay within: Supply Inventory)</b>			
	<b>Field Name</b>	<b>Formats</b>	<b>Description</b>
	Pos. Cabinet Location Number		Facility location where the cabinet resides.
	Pos. Cabinet Desc.		Text description of the cabinet.
	Pos. Cabinet Status Desc.		Text description of the Pos. Cabinet Status. Values "Active" or "Inactive".
	Pos. Cabinet Status	A, I	Flag indicating whether the cabinet is currently in use. An inactive cabinet is only stored in the database for reporting reasons.
	Pos. Compartment		Sequential letter identifying the specific compartment in which a supply resides. Values: A - P. Sequential number from 1-999 for virtual storage compartments.
	Pos. DT's Name		Text description of the Display Terminal where the cabinet is assigned.
	Pos. Failed Flag	Y or Null	Indicates that a dispense discrepancy has occurred in this supply position.
	Pos. Is this Position Failed?		Text description of the Pos. Failed Flag. Values "Yes" or "No".
	Pos. Current Qty		The quantity of a supply occupying a specific supply position.
	Pos. Desc. w/ Failed Flag		Combined field consisting of the Supply Position Description and an "(F)" if the Position is failed.
	Pos. Description		Description of the supply position (e.g. Unit Dose Module 1 Bin 4, Drawer Module 3 drawer 2 Compartment 12, Cabinet 1 Hook 10, Cabinet 3 Box 1-1).
	Pos. Desc. for Sorting		Use the field to group and sort by the supply position.
	Pos. Lot #		Lot Number to which the medication assigned to the position belongs.

	Pos. MedOrder Override	Y or Null	If the value is Y then any user with the appropriate DEA Schedule and CDC rights can override this supply loaded in this position. If the value is Null and the supply is marked as MedOrderRequired then it can not be dispensed from the supply browser unless the user has MedOrder override access rights.
	Pos. Maximum Qty		The maximum amount of a supply that a facility wants to keep in a particular supply position.
	Pos. Minimum Qty		The minimum amount of a supply that a facility wants to keep in a particular supply position.
	Pos. Nearest Expiration Date		Date the medication assigned to the position is to expire.
	Pos. Date Last Audited (Centrack Catalog Login ONLY)		Date & time of the last Centrack audit performed on this supply.
	Pos. Return Drawer Flag	I, O or Null	Flag indicating drawer can accept returns. I - accepts returns, O- allows retrieval of returns, blank - does not accept or allow retrieval of returns.
	Pos. Status	A, I	Flag indicating whether this supply position is currently configured as part of a controller. All supply positions will be active until the controller is deleted or the controller configuration changes. The supply positions affected will be flagged inactive.
	Pos. Status Desc.		Test description of Pos. Status. Values "Active" or "Inactive".
	Pos. Status Key (SmartStock par level Only)	30, 31, 32	StatusKey indicating the status of this non-billable virtual supply position. 31 - Below Min, 30 - Out of Stock and 32 - Restocked. Smartstock - (Non-Counted Positions).

	Pos. Stock-It Restock Amount		Quantity to be stocked in a specific position. This field will be populated by the Centrack application for Centrack supplies and by a cron job for non-Centrack supplies. The cron job is to be scheduled and it calculates the amount to restock the position to it's maximum.
	Pos. Type Key	48, 49	Statuskey indicating whether this position will be tracked as par level or counted. 48 - Not Counted (par level), 49 - Counted.
	Pos. Counted or Not Counted		Text description of Pos. Type Key. Values "Counted" or "Not Counted".
	Pos. Not Counted Inventory Status (SmartStock par level Only)		Text description of the Pos. Status Key. Values "Out of Stock", "Below Min" or "Restocked".
	Pos. Cabinet Status = 'A'		Retrieves all cabinets that have not been deleted from the MedSelect System.
	Pos. Counted Med/Supplies	49	Retrieves all supply positions with a Pos. Type Key of 49.
	Pos. No Expiration Date		Retrieves all supply positions that do not have an Expiration Date.
	Pos. SS Not Counted Med/Supplies (SmartStock par level Only)	48	Retrieves all SmartStock supply positions with a Pos. Type Key of 48.
	Pos. SS Not Counted Below Minimum (SmartStock par level Only)		Retrieves all SmartStock, not counted positions that were scanned below minimum.
	Pos. SS Not Counted Out of Stock (SmartStock par level Only)		Retrieves all SmartStock, not counted positions that were scanned out of stock
	Pos. SS Not Counted Restocked (SmartStock par level Only)		Retrieves all SmartStock, not counted positions that were scanned restocked.
	Pos. Past Expiration Date		Retrieves all supply positions whose expiration date has passed.
	Pos. Position is Available		Retrieves all supply positions that do not have a supply assigned.
	Pos. Position is Failed		Retrieves all supply positions that have been failed.
	Pos. Qty is Below Minimum		Retrieves all supply positions that have a current quantity less than the minimum quantity.

	Pos. Return and Retrieve Positions		Retrieves all supply positions that are flagged as return or retrieve.
	Pos. Status = 'A'		Retrieves all supply position that have not been deleted from the MedSelect System.

	<b>Inv. Supplies subfolder (Parent folder Stay within: Supply Inventory)</b>		
	Inv. Unique Generic and Item Code (Use for Grouping)		Unique Combined field for grouping and sorting by Generic Name.
	Inv. Supply Generic Name, Strength, Size, Units, Form		Combined field containing Supply Generic Name, Strength, Size, Units and Form.
	Inv. Supply Trade Name		The proprietary name protected by US trademark for a supply.
	Inv. Supply Generic Name		The non-trademark name for a supply or the chemical name for a medicine.
	Inv. Item Code		The number assigned by the facility to uniquely identify a supply. For medications, this is the facility formulary number.
	Inv. Supply Size and Size Units		Combined field containing Supply Size & Supply Size Units.
	Inv. Supply Size		The per unit amount of a supply (e.g. 400 units).
	Inv. Supply Size Units		The measurement used with a supply size (e.g. mg, ml, etc).
	Inv. Supply Strength		Application strength of the prescribed med.
	Inv. Supply Form		The form of the substance. (e.g. capsule or tablet).
	Inv. DEA 2 Prime Sort		Use this field if you would like the supplies to be sorted first by DEA 2's alphabetically by Generic Name and then all other DEA Schedules follow alphabetically by Generic Name in ascending order.
	Inv. DEA Schedule		Text description of the Inv. DEA Schedule Key. Values "1", "2", "3", "4", "5", "6", "OTC" and "Legend".
	Inv. DEA Schedule Key	1, 2, 3, 4, 5, 6, 37, 38	A Drug Enforcement Agency defined class of drug. 37 = OTC, 38 = Legend.

	Inv. Defined Class Desc.		Facility defined class associated with this supply.
	Inv. Supply System Minimum Qty		The minimum quantity of a supply that a facility wants to keep in inventory. The supply should be re-ordered when minimum is reached.
	Inv. Supply System Maximum Qty		The maximum quantity of this supply that should be in stock. Maximum quantities prevent over-stocking.
	Inv. Supply System Total Qty		The actual quantity of this supply currently being stored by MedSelect.
	Inv. Supply Cost		The latest cost of a particular supply.
	Inv. Manufacturer Part Number		The number assigned by a manufacturer to identify a supply.
	Inv. NDC Code		National Drug Code (NDC) is a pharmacy defined code for specifying medications.
	Inv. Pharmacy Location		Description of a location within the pharmacy where medication is located.
	Inv. Supply Charge Code		Hospital code used for billing a supply.
	Inv. Vendor #		Number assigned by the facility which uniquely identifies the vendor of a supply.
	Inv. Accept MedOrders from Interface		Used for a MedOrder interface to indicate whether MedSelect should accept MedOrders for this supply. Values "Yes" or "No".
	Inv. Count Remaining Req'd		Indicates that the supply must be recounted every time a supply is taken or returned. Values "Yes" or "No".
	Inv. MedOrder Req'd to Dispense		Indicates that a medication must be in the Patient's MedOrder profile before it can be dispensed. Values "Yes" or "No".
	Inv. Centrack Count Remaining (Centrack Catalog Login ONLY)		Indicates that the supply must be recounted every time a supply is taken from or returned to the Centrack System. Values "Yes" or "No".

	Inv. Returned to Original Drawer		Indicates whether this supply is to be returned to its original drawer rather than to the return drawer. This only applies to supplies assigned to non-UDM positions. Values "Yes" or "No".
	Inv. Waste Witness Req'd		A customer option that indicates that a second user must login to witness the wasting of a supply, usually a controlled medication. Values "Yes" or "No".
	Inv. Send to Billing Interface		Indicates whether dispenses of this supply should be sent to the billing interface. Values "Yes" or "No".
	Inv. Centrack Supplies Only (Centrack Catalog Login ONLY)		Retrieves supplies that are stocked in the Centrack Vault.

	<b>Inventory Supply Flags subfolder (Parent subfolder Inv. Supplies)</b>		
	Inv. Accept Med Orders Flag	A, I	Used for a MedOrder interface to indicate whether MedSelect should accept MedOrders for this supply. A - Yes, I - No.
	Inv. Billing Flag	B, N	Character indicating whether supply is billable or nonbillable. B - billable, N - nonbillable.
	Inv. Centrack Count Remaining Flag	Y, Null	Flag indicating that the supply must be recounted every time a supply is taken from or returned to the pharmacy. Y - Yes, Null - No.
	Inv. Count Remaining Flag	Y, N	Flag indicating that the supply must be recounted every time a supply is taken or returned. Y - Yes, N - No.
	Inv. MedOrder Required Flag	Y, N	A customer option that indicates that a medication must be in the Patient's profile before it can be dispensed. Y - Yes, N - No.
	Inv. Return Meds to Drawer Flag	Y, N	Flag indicating whether this supply can be returned to its original drawer rather than to the return drawer. This flag does not apply to UDM's. Y - Yes, N - No.
	Inv. Tracked by Centrack (Centrack Catalog Login ONLY)	Y, Null	Flag indicating that this supply is managed by Centrack. Y - Yes, Null - No

	Inv. Witness Required Flag	Y, N	A customer option that indicates that a second user must login to witness the wasting of a supply, usually a controlled medication. Y - Yes, N - No.
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	<b>Supply Type Filters subfolder (Parent folder Stay within: Supply Inventory)</b>		
	Centrack (Vault Only) (Centrack Catalog Login ONLY)		Retrieves all supplies defined in the Centrack vault.
	Display Terminals		Retrieves all supplies defined in the MedSelect for dispensing.
	SS+ Display Terminals		Retrieves all supplies defined in the SupplySource Towers.



**Stay within: SIG Codes**

	Field Name	Formats	Description
	SIG User Last to Update		Combined field consisting of the user's surname and first name who last updated this SIG.
	SIG Code		Unique text identifying a facility defined SIG.
	SIG Day of Month		A comma-delimited list of integers that indicate the day(s) of the month the medication should be administered. (1 – 31)
	SIG Day of Week		A comma-delimited list of integers that indicate the day(s) of the week the medication should be administered. (0 – Sunday, 6 – Saturday)
	SIG Default Hours		The default string of administration times in military hours associated with this SIG. (i.e. 0800,1400)
	SIG Repeat Interval		The number of hours indicating how often the sequence of give records is repeated.
	SIG Repeat Sequence		Values “Monthly”, “Daily”, “Weekly” or “Hourly”.

	SIG Repeat Code	M, D, W, H	Single character indicating the repeat sequence for the give schedules. ( M – monthly, D – Daily, W – weekly, H – Hourly)
	SIG Stat	Y, Null	Flag Indicating whether the medication should be given immediately. Stat can be combined with any other SIG.
	SIG External Condition	Y, Null	Flag indicating that this SIG is based on some external condition (i.e. give if blood pressure drops). It will be treated as a PRN therefore no give records will be generated.
	SIG Last Change Date		Date and time stamp indicating the last time this SIG was modified.



**Stay within: System Configuration**

<b>Controller Configuration subfolder (Parent folder Stay within: System Configuration)</b>			
	<b>Field Name</b>	<b>Formats</b>	<b>Description</b>
	CCI. Display Terminal's Location		Indicates the default Location the DT is assigned to. When a patient is added at the DT, this is the patient's assigned location.
	CCI. Cabinet Location		Indicates the Location the cabinet is assigned to.
	CCI. Cabinet Desc.		Text description of the cabinet.
	CCI. Controller Address		Each controller is assigned a unique number for identification by the MedSelect system.
	CCI. Controller Configuration		Code representing the hardware configuration for this controller type.
	CCI. Controller Sequence #		Sequential number given to a controller within a cabinet. This number is used to display controllers in a logical order (left to right, top to bottom).
	CCI. Controller Status Desc.		Text description on the CCI. Controller Status. Values "Active" or "Inactive".
	CCI. Controller Status	A, I	Flag indicating whether the controller is active. An inactive controller is only stored in the database for reporting reasons.

	CCI. Controller Type Key		Unique number identifying to the system a specific storage device type.
	CCI. Controller Type Desc.		Text description of a storage device type.
	CCI. DT's Name		
	CCI. Door or Drawer Position Desc.		Text describing the physical location (i.e. DM1 drawer 2-1).
	CCI. Supply Position Desc.		Text describing the physical location and the compartment (i.e. DM1 drawer 2-1 A).
	CCI. Position Desc. for Sorting		Use this field for sorting CCI. Supply Position Desc. In Logical order.
	CCI. Cabinet Status	A, I	Flag indicating whether the cabinet is active. An inactive cabinet is only store in the database for reporting reasons.
	CCI. Cabinet Status = 'A'		Retrieves cabinets that have not been deleted from the system.
	CCI. Controller Status = 'A'		Retrieves controllers that have not been deleted from the system.
	CCI. Door or Drawer Position = 'A'		Retrieves supply positions that have not been deleted from the system.

	<b>CCI. Controller Types subfolder (Parent folder Controller Configuration subfolder)</b>		
	CCI. Controller Type Key		Unique number identifying to the system a specific storage device type, such as Hook, Register, Unit Dose Module, or Box Register.
	CCI. Drawer	6	Retrieves all non-sensor drawer controllers.
	CCI. Electronic Lock	11	Retrieves all electronic lock controllers.
	CCI. Injectable Shelf	7	Retrieves all injectable shelf controllers.
	CCI. Orals/Injectables Shelf	8	Retrieves all oral/injectables shelf controllers.
	CCI. Sensor Drawer	10	Retrieves all sensor drawer controllers.
	CCI. UDM Lock	9	Retrieves all UDM lock controllers.

	<b>Stay within: Display Terminal subfolder (Parent folder Stay within: Supply Inventory)</b>		
	DT. DT's Name		A unique name that identifies each PC on the ethernet network.
	DT. Software Version		Current software version installed on DT.
	DT. Location		The DT's assigned location.
	DT. IP Address		The unique address associated to this DT which allows the DT to communicate on the facilities network.
	DT. Logging Level	0,1,2,3	Level of logging currently turned on for a DT.
	DT. Mode Command		A state this DT has been instructed to take (i.e. Active, Inactive, Offline)
	DT. Mode Status		The current state of the DT (i.e Active, Inactive, Offline).
	DT. Receipt Printer Flag	Y,N	Indicates whether a receipt printer is attached to the Display Terminal.



**Stay within: System Log Messages**

Field Name	Formats	Description
System Application Desc.		Application logging the event (e.g. DT, AWS).
System Logging Date		Date and time the event occurred.
System Logging Desc.		Descriptive information of event.
System Logging Type		Descriptive information of action creating the logging event.
System Window/Interface		Descriptive information for MedSelect.
 Administrative WorkStation		Retrieves all logged events created by the AWS.
 ADT Interface		Retrieves all logged events created by the ADT Interface.
 Centrack		Retrieves all logged events created by Centrack.
 Display Terminal		Retrieves all logged events created by the Display Terminal.
 MedOrder Interface		Retrieves all logged events created by the MedOrder Interface.
 Nursing WorkStation		Retrieves all logged events created by the NWS.
 Restocking WorkStation		Retrieves all logged events created by the RWS.



## **Appendix B**

### **Demonstrations**



## Section 1 Demo 1: How Much Data to Retrieve

**Objective:** To view the narcotic usage for just one nurse. Only retrieve the data needed to prevent your server from lock-ups.

1. From MedSelect Examiner, open the **Controlled Substance Archive** report. (From the **File** menu, select **Open**, from the Rx Reports folder)
2. Enter a one-day **Date Range**.

The Controlled Substance Archive Report is displayed showing controlled substance usage for one day.

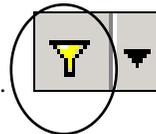
<b>MedSelect®</b>		<b>Controlled Substance Archive</b>			Begin Date: 02/11/2000 12:00:00 AM End Date: 02/11/2000 11:59:59 PM	
				02/19/2000 11:14:47 AM	Page 1 of ??	
<b>Generic Name: Alprazolam 0.25 mg 1</b>				<b>DEA Schedule: 4</b>		
<b>Trade Name: XANAX</b>				<b>Defined Class:</b>		
Date	Qty Status	Patient Name Patient ID #	Room Bed	User Ord. Physician	Supply Position Waste Witness	
02/11/2000 02:30:10 PM	1 Taken	McHenry, Ida 302	132 B	RN, Nancy Doctor, Bethany	Unit Dose Module Shelf 1-1	
02/11/2000 02:31:00 PM	0.25 Wasted	McHenry, Ida 302	132 B	RN, Nancy Doctor, Bethany	Unit Dose Module Shelf 1-1	
02/11/2000 02:31:47 PM	0.75 Wasted	McHenry, Ida 302	132 B	RN, Nancy Doctor, Bethany	Unit Dose Module Shelf 1-1	
02/11/2000 02:32:05 PM	1 Taken	McHenry, Ida 302	132 B	RN, Nancy Doctor, Bethany	Unit Dose Module Shelf 1-1	
02/11/2000 03:18:26 PM	20 Stocked			Technician, Amber	Unit Dose Module Shelf 1-1	
02/11/2000 03:18:27 PM	12 Stocked			Technician, Amber	Unit Dose Module Shelf 1-1	
<b>Generic Name: Cocaine hydrochloride 4% 4 ml</b>				<b>DEA Schedule: 2</b>		
<b>Trade Name: COCAINE TOPICAL SOLUTION</b>				<b>Defined Class: ER</b>		
Date	Qty Status	Patient Name Patient ID #	Room Bed	User Ord. Physician	Supply Position Waste Witness	
02/11/2000 03:18:41 PM	2 Stocked			Technician, Amber	Unit Dose Module Shelf 4-1	
02/11/2000 03:20:26 PM	1 Taken	Samuels, Thomas 402	237 D	RN, Nancy	Unit Dose Module Shelf 4-1	
02/11/2000 03:30:06 PM	6 Stocked			Technician, Amber	Unit Dose Module Shelf 4-1	

Let's look at the usage for only one nurse.

3. Select User Nancy RN so it is highlighted.

<b>MedSelect®</b>		<b>Controlled Substance Archive</b>			Begin Date: 02/11/2000 12:00:00 AM End Date: 02/11/2000 11:59:59 PM Page 1 of ??	
Generic Name: Alprazolam 0.25 mg 1 Trade Name: XANAX				DEA Schedule: 4 Defined Class:		
Date	Qty Status	Patient Name Patient ID #	Room Bed	User Ord. Physician	Supply Position Waste Witness	
02/11/2000 02:30:10 PM	1 Taken	McHenry, Ida 302	132 B	RN, Nancy Doctor, Bethany	Unit Dose Module Shelf 1-1	
02/11/2000 02:31:00 PM	0.25 Wasted	McHenry, Ida 302	132 B	RN, Nancy Doctor, Bethany	Unit Dose Module Shelf 1-1	
02/11/2000 02:31:47 PM	0.75 Wasted	McHenry, Ida 302	132 B	RN, Nancy Doctor, Bethany	Unit Dose Module Shelf 1-1	
02/11/2000 02:32:05 PM	1 Taken	McHenry, Ida 302	132 B	RN, Nancy Doctor, Bethany	Unit Dose Module Shelf 1-1	
02/11/2000 03:18:26 PM	20 Stocked			Technician, Amber	Unit Dose Module Shelf 1-1	
02/11/2000 03:18:27 PM	12 Stocked			Technician, Amber	Unit Dose Module Shelf 1-1	
Generic Name: Cocaine hydrochloride 4% 4 ml Trade Name: COCAINE TOPICAL SOLUTION				DEA Schedule: 2 Defined Class: ER		
Date	Qty Status	Patient Name Patient ID #	Room Bed	User Ord. Physician	Supply Position Waste Witness	
02/11/2000 03:18:41 PM	2 Stocked			Technician, Amber	Unit Dose Module Shelf 4-1	
02/11/2000 03:20:26 PM	1 Taken	Samuels, Thomas 402	237 D	RN, Nancy	Unit Dose Module Shelf 4-1	
02/11/2000 03:30:06 PM	6 Stocked			Technician, Amber	Unit Dose Module Shelf 4-1	

4. From the **Standard PowerBar**, select the **Filter** button.



This report now displays one day controlled substance usage for Nancy RN only.

<b>MedSelect®</b>		<b>Controlled Substance Archive</b>			Begin Date: 02/11/2000 12:00:00 AM End Date: 02/11/2000 11:59:59 PM	
		02/19/2000 11:26:20 AM			Page 1 of ??	
<b>Generic Name: Alprazolam 0.25 mg 1</b> Trade Name: XANAX				<b>DEA Schedule: 4</b> Defined Class:		
Date	Qty	Patient Name	Room	User	Supply Position	Waste Witness
	Status	Patient ID #	Bed	Ord. Physician		
02/11/2000 02:30:10 PM	1	McHenry, Ida	132	RN, Nancy	Unit Dose Module Shelf 1-1	
	Taken	302	B	Doctor, Bethany		
02/11/2000 02:31:00 PM	0.25	McHenry, Ida	132	RN, Nancy	Unit Dose Module Shelf 1-1	
	Wasted	302	B	Doctor, Bethany		
02/11/2000 02:31:47 PM	0.75	McHenry, Ida	132	RN, Nancy	Unit Dose Module Shelf 1-1	
	Wasted	302	B	Doctor, Bethany		
02/11/2000 02:32:05 PM	1	McHenry, Ida	132	RN, Nancy	Unit Dose Module Shelf 1-1	
	Taken	302	B	Doctor, Bethany		
<b>Generic Name: Cocaine hydrochloride 4% 4 ml</b> Trade Name: COCAINE TOPICAL SOLUTION				<b>DEA Schedule: 2</b> Defined Class: ER		
Date	Qty	Patient Name	Room	User	Supply Position	Waste Witness
	Status	Patient ID #	Bed	Ord. Physician		
02/11/2000 03:20:26 PM	1	Samuels, Thomas	237	RN, Nancy	Unit Dose Module Shelf 4-1	
	Taken	402	D			
<b>Generic Name: Oxycodone/ Acetaminophen 5/325 mg 1</b> Trade Name: PERCOET				<b>DEA Schedule: 2</b> Defined Class:		
Date	Qty	Patient Name	Room	User	Supply Position	Waste Witness
	Status	Patient ID #	Bed	Ord. Physician		
02/11/2000 01:56:13 PM	1	Arron, Nettie	216	RN, Nancy	Unit Dose Module Shelf 2-1	
	Taken	933	411C			
02/11/2000 01:57:30 PM	1	Bei1, James	101	RN, Nancy	Unit Dose Module Shelf 2-1	
	Taken	911	703A			

Now let's look at Nancy RN's controlled substance activities for the previous 10 days.



- From the **Standard Power Bar**, select the **Prompt** button.
- Enter the **Date Range** for the last 10 days.

The report now displays all of Nancy RN's controlled substance activities for the previous 10 days.

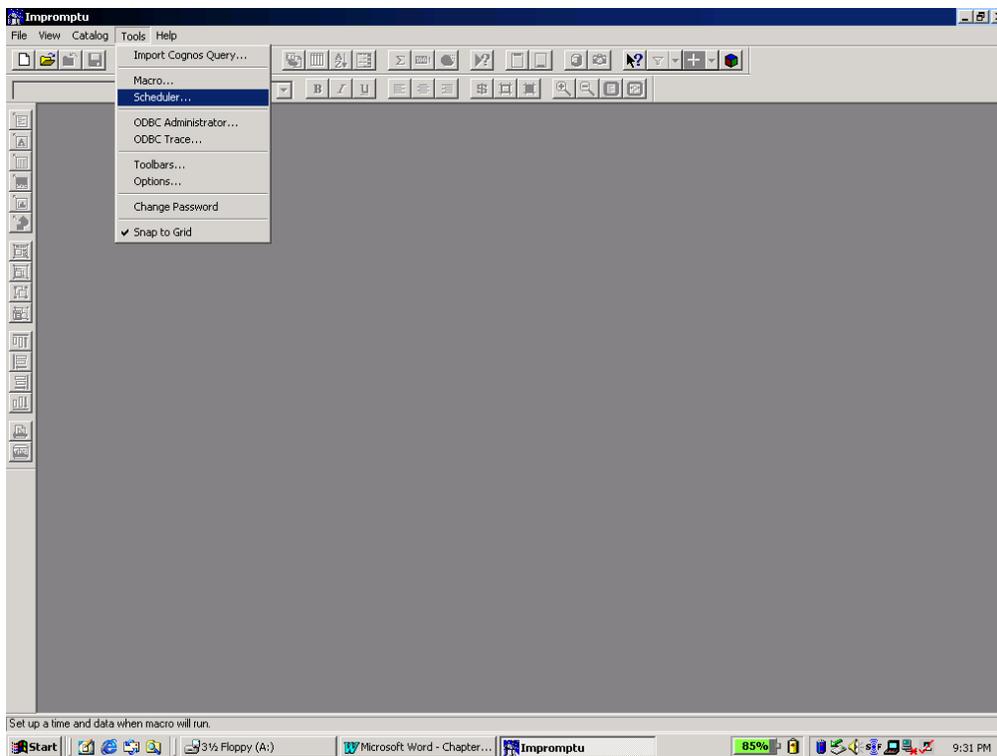
<b>MedSelect®</b>		<b>Controlled Substance Archive</b>			Begin Date: 02/01/2000 12:00:00 AM End Date: 02/11/2000 11:59:59 PM	
				02/19/2000 01:06:30 PM	Page 1 of ??	
<b>Generic Name: Alprazolam 0.25 mg 1</b>				<b>DEA Schedule: 4</b>		
<b>Trade Name: XANAX</b>				<b>Defined Class:</b>		
Date	Qty Status	Patient Name Patient ID #	Room Bed	User Ord. Physician	Supply Position Waste Witness	
02/11/2000 02:30:10 PM	1 Taken	McHenry, Ida 302	132 B	RN, Nancy Doctor, Bethany	Unit Dose Module Shelf 1-1	
02/11/2000 02:31:00 PM	0.25 Wasted	McHenry, Ida 302	132 B	RN, Nancy Doctor, Bethany	Unit Dose Module Shelf 1-1	
02/11/2000 02:31:47 PM	0.75 Wasted	McHenry, Ida 302	132 B	RN, Nancy Doctor, Bethany	Unit Dose Module Shelf 1-1	
02/11/2000 02:32:05 PM	1 Taken	McHenry, Ida 302	132 B	RN, Nancy Doctor, Bethany	Unit Dose Module Shelf 1-1	
<b>Generic Name: Cocaine hydrochloride 4% 4 ml</b>				<b>DEA Schedule: 2</b>		
<b>Trade Name: COCAINE TOPICAL SOLUTION</b>				<b>Defined Class: ER</b>		
Date	Qty Status	Patient Name Patient ID #	Room Bed	User Ord. Physician	Supply Position Waste Witness	
02/11/2000 03:20:26 PM	1 Taken	Samuels, Thomas 402	237 D	RN, Nancy	Unit Dose Module Shelf 4-1	
<b>Generic Name: Oxycodone/ Acetaminophen 5/325 mg 1</b>				<b>DEA Schedule: 2</b>		
<b>Trade Name: PERCOCET</b>				<b>Defined Class:</b>		
Date	Qty Status	Patient Name Patient ID #	Room Bed	User Ord. Physician	Supply Position Waste Witness	
02/11/2000 01:56:13 PM	1 Taken	Airon, Nettie 933	216 411C	RN, Nancy	Unit Dose Module Shelf 2-1	
02/11/2000 01:57:30 PM	1 Taken	Berl, James 911	101 703A	RN, Nancy	Unit Dose Module Shelf 2-1	
02/11/2000 02:07:06 PM	1 Taken	Caslan, Henrieta 944	OR3	RN, Nancy	Unit Dose Module Shelf 2-1	

## Section 1

### Demo 2: Scheduling Auto Reports

**Objective:** To schedule a MedSelect Auto report to run once.

1. With MedSelect Examiner open, select **Tools**, then **Scheduler**.



The Scheduler window is displayed.

2. From the **Insert** menu of Scheduler, select **Task**.

The **Insert Task dialog** box is displayed.

3. Click the **Browse** button.

Auto reports are located at the following path: **C:\Program Files\Cognos\Cer1\Rx Auto Reports**.

4. Select **Out of Stock (Auto).imr**.

5. Click the **Open** button.

The path of the Out of Stock report is now displayed in the **File Name** field.

6. In the Description field, type the name of the report: **Out of Stock**.

7. Be sure it is marked to execute on **My Computer**.

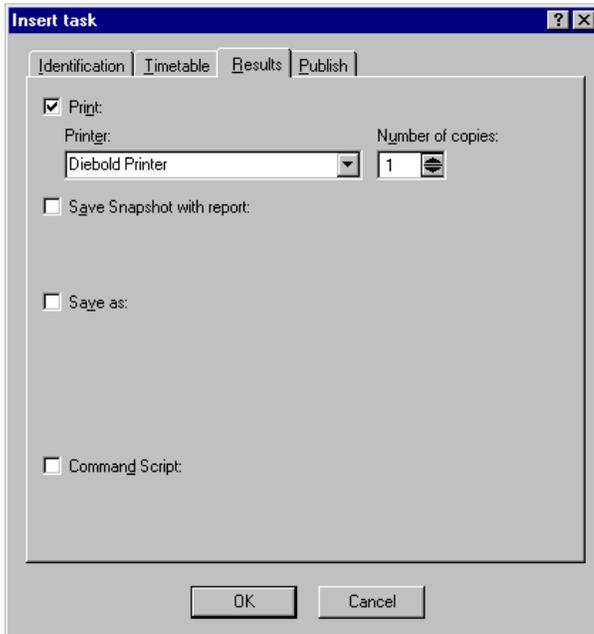
8. Select the **Timetable** tab.

9. Schedule the report to run one week from now.

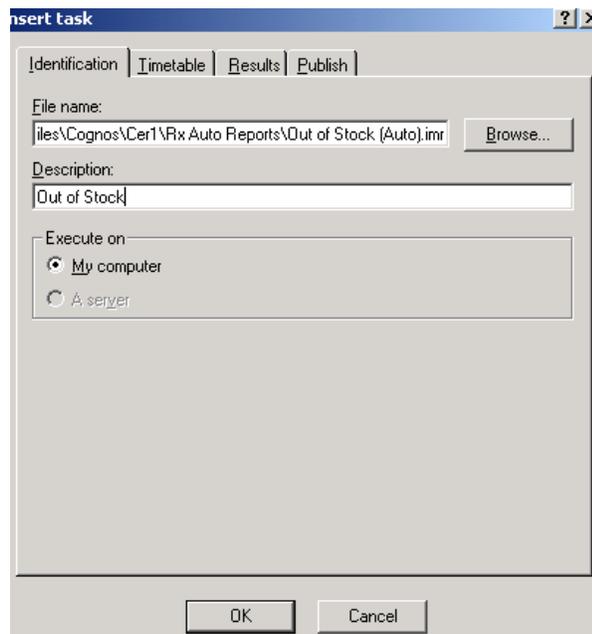
10. Select the **Results** tab.

11. Check the **Print** option.

12. In the Printer drop down list, select **MedSelect Printer**.



13. Select **OK**.



The task is now scheduled

14. Minimize the Scheduler application, but **do not close Scheduler**.

Scheduler must be running for the report to print automatically. However, you can close the Examiner application if you wish. If Examiner is not running when it is time for the report to print, Scheduler will automatically launch Examiner then open and print the report.



## Section 1

### Demo 3: Scheduling Discrepancy Report

**Objective:** To schedule the Discrepancy Report to print daily at 8:00 am for the next month.

1. With MedSelect Examiner open, select **Tools**, then **Scheduler**.
2. From the **Insert** menu of Scheduler, select **Recurring Task**.

The Insert Task dialog box is displayed.

3. Click the **Browse** button.

Auto reports are located at the following path: C:\Program Files\Cognos\Cer1\Rx Auto Reports. However, the discrepancy report is not built using Examiner, so it does not have an .imr extension like the Examiner reports. Instead, it has the extension .exe. By default, only report files with the .imr extension are displayed, so you will not see the Discrepancy Report listed. Steps 4 and 5 explain how to make it visible.

4. To see all files, open the **Files of Type** drop down list.
5. Select **All Files**.

The discrepancy executable is now displayed.

6. Select **discrep.exe**.
7. Click the **Open** button.

The path of the Discrepancy report is now displayed in the **File Name** field.

8. In the **Description** field, type the name of the report: **Daily Discrepancy Report**.
9. Be sure it is marked to execute on **My Computer**.

10. Select the **Timetable** tab.



11. Schedule the report to run daily at 8:00 am beginning tomorrow and ending one month from today.

12. Select the **OK** button.

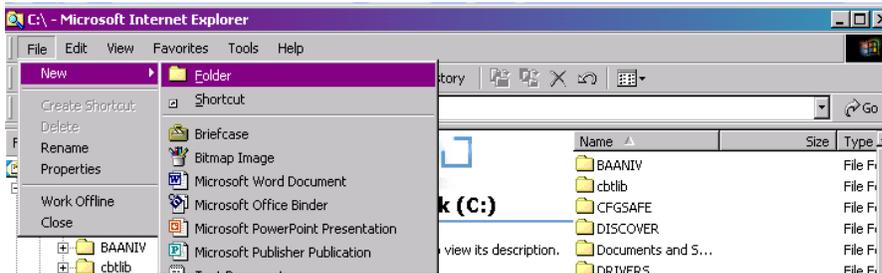
The report is scheduled.

## Section 2

### Demo 1: Creating Custom Report Folders

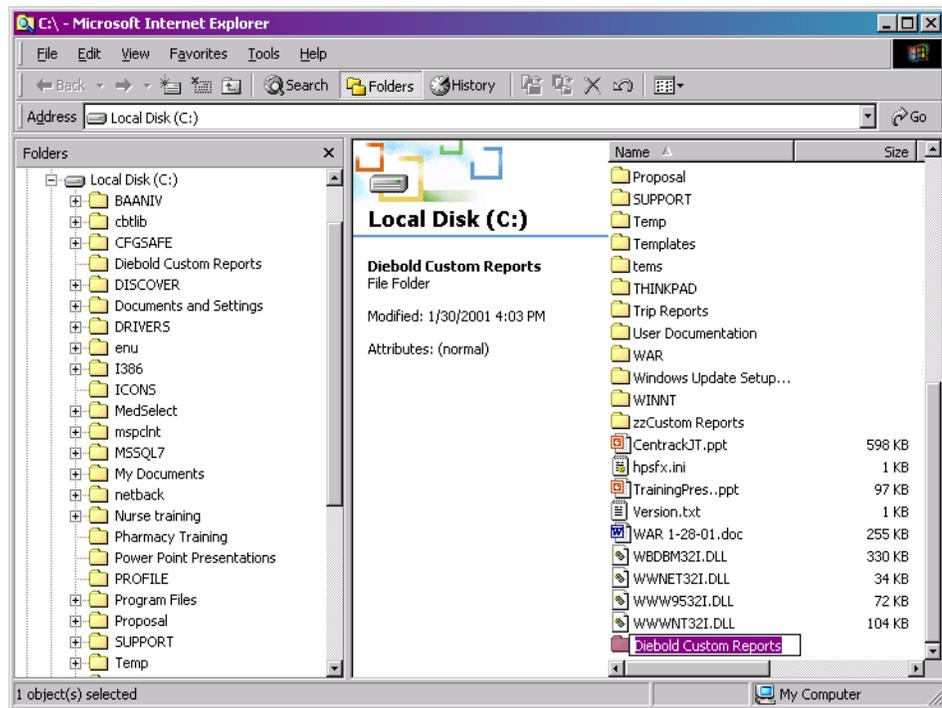
**Objective:** To create folders for custom created reports.

1. Click on your Windows **Start** button in the lower left corner of the screen.
2. Go to **Programs**, then **Windows Explorer**.
3. Click on the **C:** drive.
4. Within the Exploring window, go to **File, New, and Folder**.



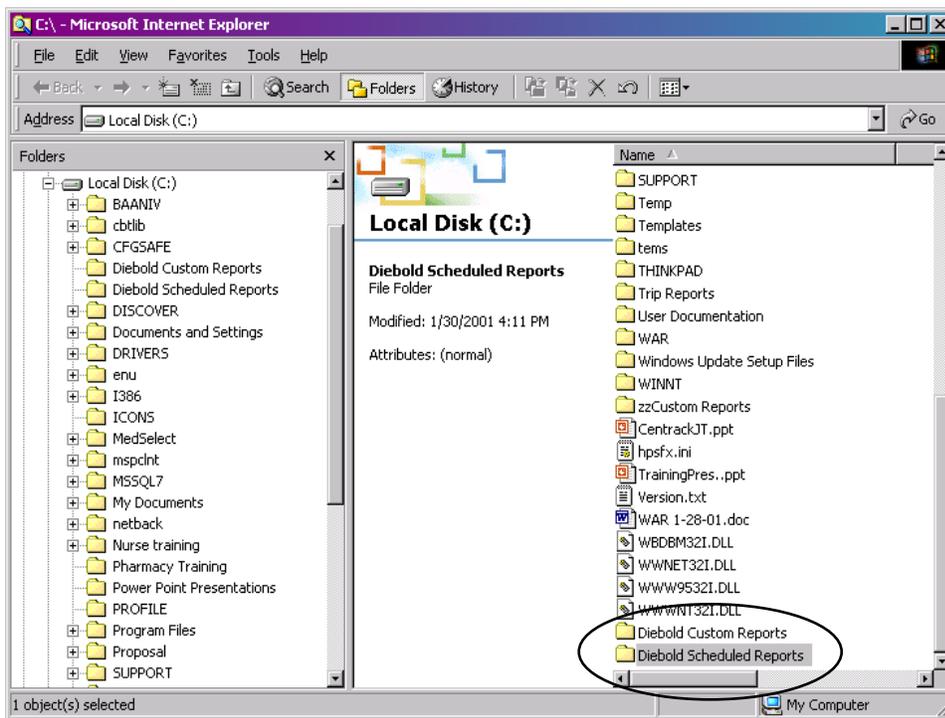
A new folder is created and waiting for you to name it.

5. Type **MedSelect Custom Reports**.



6. Create a **second** new folder

7. Type **MedSelect Scheduled Custom Reports.**





## Section 2

### Demo 2: Hiding Data on a Standard Report

**Objective:** To illustrate how to "Hide" and "Show Hidden" information on Examiner standard reports. This could be useful if you wish to suppress confidential information when sharing reports.

1. From MedSelect Examiner, open the **Supply Usage Report**. (From the **File** menu, select **Open**.)
2. At the **Prompt**, enter dates for one month of data, and **one or multiple meds**.
3. Click **OK**.

The report displays one month of data.

<b>MedSelect</b> <sup>®</sup>		<b>Supply Usage</b>		Begin Date: 02/01/2000 12:00:00 AM		
		01/30/2001 09:59:53 PM		End Date: 03/01/2000 11:59:59 PM		
				Page 1 of ??		
<b>Generic Name:</b> Acetaminophen 500 mg 1 tablet		<b>DEA Schedule:</b>		<b>Supply Cost:</b> \$0.01		
<b>Trade Name:</b> Tylenol		<b>Defined Class:</b>				
Date	Qty Status	Cost	Location Supply Position	Patient Name Patient ID # Med Order #	Route Site	User Ord. Physician
02/14/2000 08:09:02 AM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	SAMUELS, THOMAS 402 123789	Oral	LPN, Mary Doctor, Adam
02/13/2000 12:20:39 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	MARS, WILLIAM 304		LPN, Nathan
02/13/2000 12:11:58 AM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	SMITH, HENRIETTA 401		RN, Larry
02/12/2000 06:46:09 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	MARS, WILLIAM 304		LPN, Nathan
02/12/2000 09:38:00 AM	1 Taken	\$0.01	100 Drawer Module Drawer 3-1 A	SAMUELS, THOMAS 402		LPN, Mary
02/12/2000 09:37:55 AM	1 Taken	\$0.01	100 Drawer Module Drawer 3-1 A	SAMUELS, THOMAS 402		LPN, Mary
02/11/2000 03:48:22 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	MARS, WILLIAM 304		RN, Martha
02/11/2000 02:37:39 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	SMITH, HENRIETTA 401		RN, Larry
02/11/2000 02:35:06 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	SAMUELS, THOMAS 402		RN, Larry
<b>Supply Total Cost:</b> \$0.14						

In this example, we will hide the "User Name", "Patient ID", MedOrder Number" and the associated column header text boxes.

- Using the **CTRL** key, select the first patient data fields, "Patient Name", "Patient ID #" and "MedOrder #"; and the "Patient Name", "Patient ID #" and "MedOrder #", column header text boxes.

MedSelect®		Supply Usage		Begin Date: 02/01/2000 12:00:00 AM	
		01/30/2001 09:59:53 PM		End Date: 03/01/2000 11:59:59 PM	
				Page 1 of ??	
Generic Name: Acetaminophen 500 mg 1 tablet			DEA Schedule: [Redacted]		Supply Cost: \$0.01
Trade Name: Tylenol			Defined Class: [Redacted]		
Date	Qty Status	Cost	Location Supply Position	Patient Name	User
02/14/2000 08:09:02 AM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	[Redacted]	Oral Physician
				SAMUELS, THOMAS	LPN, Mary
				402	Doctor, Adam
				122789	
02/13/2000 12:20:39 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	MARS, WILLIAM	LPN, Nathan
				304	
02/13/2000 12:11:58 AM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	SMITH, HENRIETTA	RN, Larry
				401	
02/12/2000 06:46:09 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	MARS, WILLIAM	LPN, Nathan
				304	
02/12/2000 09:38:00 AM	1 Taken	\$0.01	100 Drawer Module Drawer 3-1 A	SAMUELS, THOMAS	LPN, Mary
				402	
02/12/2000 09:37:55 AM	1 Taken	\$0.01	100 Drawer Module Drawer 3-1 A	SAMUELS, THOMAS	LPN, Mary
				402	
02/11/2000 03:48:22 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	MARS, WILLIAM	RN, Martha
				304	
02/11/2000 02:37:39 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	SMITH, HENRIETTA	RN, Larry
				401	
02/11/2000 02:35:06 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	SAMUELS, THOMAS	RN, Larry
				402	
Supply Total Cost: \$0.14					

- From the **Format** menu, select **Hide**.

<b>MedSelect®</b>		<b>Supply Usage</b>		Begin Date: 02/01/2000 12:00:00 AM	
		01/30/2001 10:26:20 PM		End Date: 03/01/2000 11:59:59 PM	
				Page 1 of ??	
<b>Generic Name:</b> Acetaminophen 500 mg 1 tablet		<b>DEA Schedule:</b>		<b>Supply Cost: \$0.01</b>	
<b>Trade Name:</b> Tylenol		<b>Defined Class:</b>			
<u>Date</u>	<u>Qty</u> <u>Status</u>	<u>Cost</u>	<u>Location</u> <u>Supply Position</u>	<u>Route</u> <u>Site</u>	<u>User</u> <u>Ord. Physician</u>
02/14/2000 08:09:02 AM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	Oral	LPN, Mary Doctor, Adam
02/13/2000 12:20:39 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A		LPN, Nathan
02/13/2000 12:11:58 AM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A		RN, Larry
02/12/2000 06:46:09 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A		LPN, Nathan
02/12/2000 09:38:00 AM	1 Taken	\$0.01	100 Drawer Module Drawer 3-1 A		LPN, Mary
02/12/2000 09:37:55 AM	1 Taken	\$0.01	100 Drawer Module Drawer 3-1 A		LPN, Mary
02/11/2000 03:48:22 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A		RN, Martha
02/11/2000 02:37:39 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A		RN, Larry
02/11/2000 02:35:06 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A		RN, Larry
<b>Supply Total Cost: \$0.14</b>					

If desired, additional formatting can be done to make the report more attractive.

To show what data is **hidden**:

- From the **View** menu, select **Show Hidden**.

This shows what is hidden on this report.

MedSelect®		Supply Usage			Begin Date: 02/01/2000 12:00:00 AM	
		01/30/2001 10:30:06 PM			End Date: 03/01/2000 11:59:59 PM	
					Page 1 of ??	
<b>Generic Name:</b> Acetaminophen 500 mg 1 tablet <b>Trade Name:</b> Tylenol					<b>DEA Schedule:</b> <b>Defined Class:</b>	
					<b>Supply Cost: \$0.01</b>	
Date	Qty	Cost	Location	Patient Name	Route	User
02/01/2000 08:09:02 AM	2	\$0.02	100 Drawer Module Drawer 3-1 A	Patient ID# Rec'd User# SAMUELS, THOMAS 802 123789	Oral	Ord. Physician LPN, Mary Doctor, Adam
02/19/2000 12:20:39 PM	2	\$0.02	100 Drawer Module Drawer 3-1 A	MARS, WILLIAM		LPN, Nathan
02/28/2000 12:11:58 AM	2	\$0.02	100 Drawer Module Drawer 3-1 A	SMITH, HENRIETTA		RN, Larry
02/28/2000 06:46:09 PM	2	\$0.02	100 Drawer Module Drawer 3-1 A	MARS, WILLIAM		LPN, Nathan
02/24/2000 09:38:00 AM	1	\$0.01	100 Drawer Module Drawer 3-1 A	SAMUELS, THOMAS		LPN, Mary
02/23/2000 09:37:55 AM	1	\$0.01	100 Drawer Module Drawer 3-1 A	SAMUELS, THOMAS		LPN, Mary
02/19/2000 03:48:22 PM	2	\$0.02	100 Drawer Module Drawer 3-1 A	MARS, WILLIAM		RN, Martha
02/18/2000 02:37:39 PM	2	\$0.02	100 Drawer Module Drawer 3-1 A	SMITH, HENRIETTA		RN, Larry
02/16/2000 02:35:06 PM	2	\$0.02	100 Drawer Module Drawer 3-1 A	SAMUELS, THOMAS		RN, Larry
Acetaminophen/Acetab500		Supply Total Cost: \$0.14				

**Note:** There is more information hidden on this report than what we just hid. The author of this report used the Hide feature also.

To undo the **Hide** feature:

- Using the **CTRL** key, select the fields you would like to show

MedSelect®		Supply Usage		Begin Date: 02/01/2000 12:00:00 AM		
				End Date: 03/01/2000 11:59:59 PM		
		01/30/2001 10:38:34 PM		Page 1 of ??		
Acetaminophen 500 mg 1 tablet		DEA Schedule:		Supply Cost: \$0.01		
Trade Name: Tylenol		Defined Class:				
Date	Qty	Cost	Location	Patient Name	Route	User
Status	Supply		Position	ID #	Site	Ord. Physician
02/08/2000 08:09:02 AM	2	\$0.02	100	SMUJELS, THOMAS	Oral	LPN, Mary
	Taken		Drawer Module Drawer 3-1 A	402		Doctor, Adam
				153729		
02/19/2000 12:20:39 PM	2	\$0.02	100	MARS, WILLIAM		LPN, Nathan
	Taken		Drawer Module Drawer 3-1 A	004		
02/08/2000 12:11:58 AM	2	\$0.02	100	SMITH, HENRIETTA		RN, Larry
	Taken		Drawer Module Drawer 3-1 A	001		
02/02/2000 06:46:09 PM	2	\$0.02	100	MARS, WILLIAM		LPN, Nathan
	Taken		Drawer Module Drawer 3-1 A	004		
02/24/2000 09:38:00 AM	1	\$0.01	100	SMUJELS, THOMAS		LPN, Mary
	Taken		Drawer Module Drawer 3-1 A	402		
02/24/2000 09:37:55 AM	1	\$0.01	100	SMUJELS, THOMAS		LPN, Mary
	Taken		Drawer Module Drawer 3-1 A	402		
02/08/2000 03:48:22 PM	2	\$0.02	100	MARS, WILLIAM		RN, Martha
	Taken		Drawer Module Drawer 3-1 A	004		
02/29/2000 02:37:39 PM	2	\$0.02	100	SMITH, HENRIETTA		RN, Larry
	Taken		Drawer Module Drawer 3-1 A	001		
02/20/2000 02:35:06 PM	2	\$0.02	100	SMUJELS, THOMAS		RN, Larry
	Taken		Drawer Module Drawer 3-1 A	402		
Acetaminophen Acetab 500						
		Supply Total Cost: \$0.14				

- From the **Format** menu, select **Show**.

To not show the hidden fields, turn off the **Show Hidden** option.

9. From the **View** menu, select **Show Hidden**.

<b>MedSelect®</b>		<b>Supply Usage</b>		Begin Date: 02/01/2000 12:00:00 AM		
		01/30/2001 10:42:35 PM		End Date: 03/01/2000 11:59:59 PM		
				Page 1 of ??		
<b>Generic Name:</b> Acetaminophen 500 mg 1 tablet		<b>DEA Schedule:</b>		<b>Supply Cost:</b> \$0.01		
<b>Trade Name:</b> Tylenol		<b>Defined Class:</b>				
Date	Qty Status	Cost	Location Supply Position	Patient Name Patient ID # Med Order #	Route Site	User Ord. Physician
02/14/2000 08:09:02 AM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	SAMUELS, THOMAS 402 123789	Oral	LPN, Mary Doctor, Adam
02/13/2000 12:20:39 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	MARS, WILLIAM 304		LPN, Nathan
02/13/2000 12:11:58 AM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	SMITH, HENRIETTA 401		RN, Larry
02/12/2000 06:46:09 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	MARS, WILLIAM 304		LPN, Nathan
02/12/2000 09:38:00 AM	1 Taken	\$0.01	100 Drawer Module Drawer 3-1 A	SAMUELS, THOMAS 402		LPN, Mary
02/12/2000 09:37:55 AM	1 Taken	\$0.01	100 Drawer Module Drawer 3-1 A	SAMUELS, THOMAS 402		LPN, Mary
02/11/2000 03:48:22 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	MARS, WILLIAM 304		RN, Martha
02/11/2000 02:37:39 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	SMITH, HENRIETTA 401		RN, Larry
02/11/2000 02:35:06 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	SAMUELS, THOMAS 402		RN, Larry
<b>Supply Total Cost: \$0.14</b>						

## Section 2

### Demo 3: Filter a Standard Report

**Objective:** To filter the Restock Summary standard report for Narcotics.

1. From MedSelect Examiner, open the **Restock Summary** Report. (From the **File** menu, select **Open**.)
2. Select Location **"100"**
3. At the **Prompt**, enter dates for one month of data.

The report displays one month of restock data.

<b>MedSelect®</b>		<b>Restock Summary</b>		Begin Date: 02/01/2000 12:00:00 AM	
		01/30/2001 11:13:05 PM		End Date: 03/01/2000 11:59:59 PM	
				Page 1 of ??	
<b>Location: 100</b>					
<b>Cabinet: Drawer Module</b>					
Supply Position	Qty Status	Count Remaining User / System	Generic Name Trade Name	DEA Schedule Defined Class	User / Witness Date
Drawer Module Drawer 1-2 A	20 Stocked	30	Atropine 0.4mg/1ml 1 ml injection Atropine		Technician, Amber / RN, Lamy 02/11/2000 03:18:29 PM
Drawer Module Drawer 1-2 B	50 Stocked	50	Clarithromycin 500 mg 1 tablet Blaxin		Technician, Amber / RN, Lamy 02/14/2000 09:07:58 PM
Drawer Module Drawer 1-2 B	0 Stocked	0	Clarithromycin 500 mg 1 tablet Blaxin		Technician, Amber / RN, Lamy 02/14/2000 09:07:50 PM
Drawer Module Drawer 1-2 C	25 Stocked	25	Hydrocortisone Sod Succinate 100mg/2ml 2 ml injecti SoluCortef		Technician, Amber / RN, Lamy 02/14/2000 09:08:19 PM
Drawer Module Drawer 1-2 C	0 Stocked	0	Hydrocortisone Sod Succinate 100mg/2ml 2 ml injecti SoluCortef		Technician, Amber / RN, Lamy 02/14/2000 09:08:11 PM
Drawer Module Drawer 1-2 C	2 Stocked	15	Cefuroxime 250 mg 1 tablet Cefin		Technician, Amber / RN, Lamy 02/11/2000 03:18:34 PM
Drawer Module Drawer 1-3 A	30 Stocked	50	Buffered Aspirin 325 mg 1 tablet Bufferin		Technician, Amber / RN, Lamy 02/11/2000 03:18:32 PM
Drawer Module Drawer 1-3 B	25 Stocked	25	Metoclopramide 10mg/2ml 2 ml injection Reglan		Technician, Amber / RN, Lamy 02/14/2000 09:09:10 PM
Drawer Module Drawer 1-3 B	0 Stocked	0	Metoclopramide 10mg/2ml 2 ml injection Reglan		Technician, Amber / RN, Lamy 02/14/2000 09:09:03 PM
Drawer Module Drawer 1-4 A	40 Stocked	40	Dexamethasone 4mg/1ml 1 ml injection Decadron		Technician, Amber / RN, Lamy 02/11/2000 03:18:44 PM
Drawer Module Drawer 1-4 B	20 Stocked	20	Nifedipine XL 30 mg 1 tablet PROCARDIA XL		Technician, Amber / RN, Lamy 02/14/2000 09:09:34 PM
Drawer Module Drawer 1-4 B	0 Stocked	0	Nifedipine XL 30 mg 1 tablet PROCARDIA XL		Technician, Amber / RN, Lamy 02/14/2000 09:09:30 PM
Drawer Module Drawer 1-4 C	30 Stocked	30	Famotidine 20 mg 1 tablet Pepcid		Technician, Amber / RN, Lamy 02/14/2000 09:12:50 PM
Drawer Module Drawer 1-4 C	0 Stocked	0	Famotidine 20 mg 1 tablet Pepcid		Technician, Amber / RN, Lamy 02/14/2000 09:12:41 PM
Drawer Module Drawer 1-5 A	1 Stocked	6	propofol 1% 50 ml injection Propofol		Technician, Amber / RN, Lamy 02/14/2000 09:12:41 PM

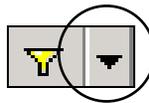
Page down until you find a narcotic.

4. Select a DEA Schedule.

<b>MedSelect®</b>		<b>Restock Summary</b>		Begin Date: 02/01/2000 12:00:00 AM
		01/30/2001 11:13:14 PM		End Date: 03/01/2000 11:59:59 PM
				Page 2 of ??
Drawer Module Drawer 1-5 A	0 Stocked	0	propofol 1% 50 ml injection Diprivan	Technician, Amber / RN, Lamy 02/12/2000 04:41:12 PM
Drawer Module Drawer 1-6 B	0 Stocked	0	Famotidine 20 mg 1 tablet Pepcid	Technician, Amber / RN, Lamy 02/14/2000 09:09:46 PM
Drawer Module Drawer 1-6 C	50 Stocked	50	Kanamycin 1 gram 1 vial injection Kantrex	Technician, Amber / RN, Lamy 02/11/2000 03:19:15 PM
Drawer Module Drawer 1-7 A	39 Stocked	50	Sufentanil 50 mcg/1ml 1 ml injection SUFENTA	Technician, Amber / RN, Lamy 02/11/2000 03:19:48 PM
Drawer Module Drawer 1-8 A	80 Stocked	80	Heparin Sodium 10,000 units/ml 1 ml injection Heparin Sodium	Technician, Amber / RN, Lamy 02/11/2000 03:19:09 PM
Drawer Module Drawer 3-1 A	10 Stocked	60	Acetaminophen 500 mg 1 tablet Tylenol	Technician, Amber / RN, Lamy 02/13/2000 08:18:52 PM
Drawer Module Drawer 3-1 A	18 Stocked	60	Acetaminophen 500 mg 1 tablet Tylenol	Technician, Amber / RN, Lamy 02/11/2000 03:18:22 PM
Drawer Module Drawer 3-2 A	1 Stocked	30	Methylprednisolone Sod Succinate 125mg/2ml 2 ml inj A-Methapred	Technician, Amber / RN, Lamy 02/13/2000 08:19:53 PM
Drawer Module Drawer 3-2 A	30 Stocked	30	Methylprednisolone Sod Succinate 125mg/2ml 2 ml inj A-Methapred	Technician, Amber / RN, Lamy 02/11/2000 03:19:29 PM
Drawer Module Drawer 3-3 A	30 Stocked	30	Gelfoam Sponge large 1 sponge topical Gelfoam	Technician, Amber / RN, Lamy 02/11/2000 03:19:04 PM
Drawer Module Drawer 4-1 A	10 Stocked	60	Ibuprofen 200 mg 1 tablet Advil	Technician, Amber / RN, Lamy 02/11/2000 03:19:11 PM
Drawer Module Drawer 4-1 A	41 Stocked	60	Docusate Sodium 100 mg 1 capsule Colace	Technician, Amber / RN, Lamy 02/11/2000 03:18:40 PM
Drawer Module Drawer 4-3 A	60 Stocked	60	Lidocaine 1% 30 ml injection Xylocaine	Technician, Amber / RN, Lamy 02/11/2000 03:19:18 PM
Drawer Module Drawer 5-1 B	13 Stocked	15	Thiopental sodium 25mg/ml 500 mg kit injection Thiopental Sodium	3 Technician, Amber / RN, Lamy 02/13/2000 08:20:21 PM
Drawer Module Drawer 5-1 B	1 Stocked	3	Thiopental sodium 25mg/ml 500 mg kit injection Thiopental Sodium	3 Technician, Amber / RN, Lamy 02/12/2000 06:36:34 PM
Drawer Module Drawer 5-1 B	0 Stocked	2	Thiopental sodium 25mg/ml 500 mg kit injection Thiopental Sodium	3 Technician, Amber / RN, Lamy 02/12/2000 06:36:23 PM
Drawer Module Drawer 5-1 B	3 Stocked	3	Thiopental sodium 25mg/ml 500 mg kit injection Thiopental Sodium	3 Technician, Amber / RN, Lamy 02/12/2000 04:41:35 PM

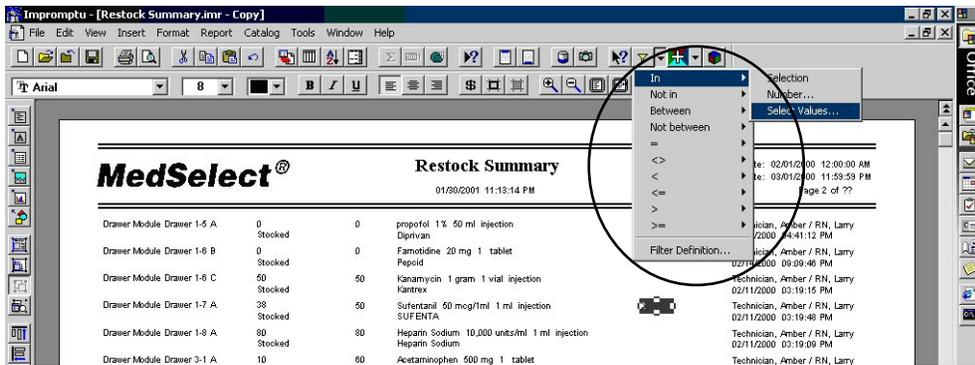


5. Use the Filter Down Arrow

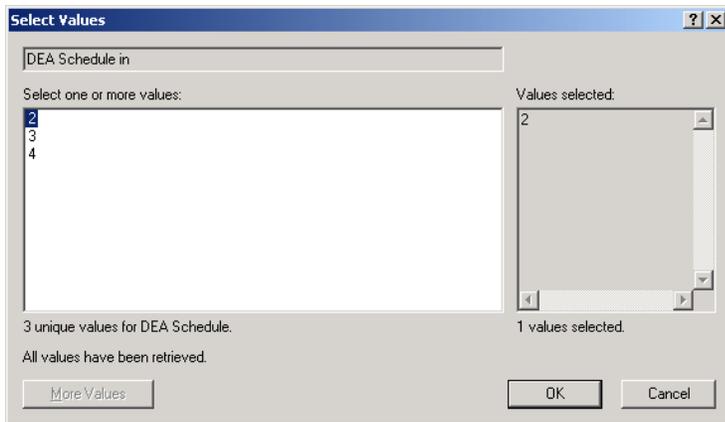


Now we would like to select one or more **DEA schedules**.

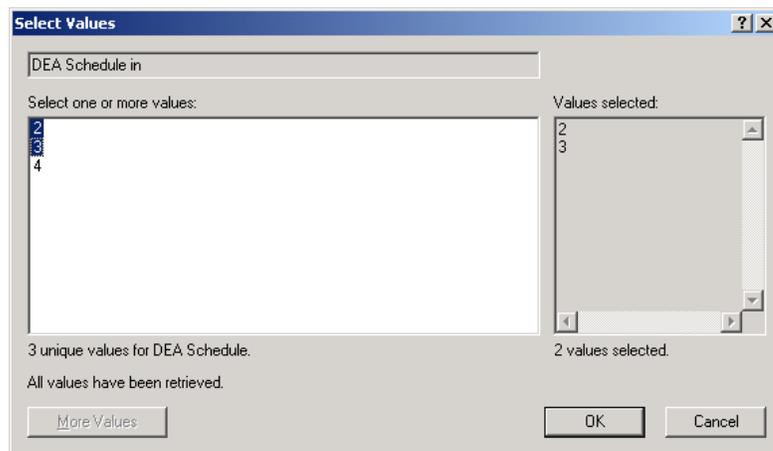
6. Go to, **“In”** and **“Select Values”**.



This will allow you to select one or more value(s).



7. For this example we will ask for **Class 2 and 3**.



This will give us a report with only those classes selected.

<b>MedSelect®</b>		<b>Restock Summary</b>		Begin Date: 02/01/2000 12:00:00 AM	
		01/30/2001 11:44:06 PM		End Date: 03/01/2000 11:59:59 PM	
				Page 1 of ??	
<b>Location: 100</b>					
<b>Cabinet: Drawer Module</b>					
<u>Supply Position</u>	<u>Qty Status</u>	<u>Count Remaining User / System</u>	<u>Generic Name Trade Name</u>	<u>DEA Schedule Defined Class</u>	<u>User / Witness Date</u>
Drawer Module Drawer 1-7 A	38 Stocked	50	Sufentanil 50 mcg/1ml 1 ml injection SUFENTA	2	Technician, Amber / RN, Larry 02/11/2000 03:19:48 PM
Drawer Module Drawer 5-1 B	13 Stocked	15	Thiopental sodium 25mg/ml 500 mg kit injection Thiopental Sodium	3	Technician, Amber / RN, Larry 02/13/2000 08:20:21 PM
Drawer Module Drawer 5-1 B	1 Stocked	3	Thiopental sodium 25mg/ml 500 mg kit injection Thiopental Sodium	3	Technician, Amber / RN, Larry 02/12/2000 06:36:34 PM
Drawer Module Drawer 5-1 B	0 Stocked	2	Thiopental sodium 25mg/ml 500 mg kit injection Thiopental Sodium	3	Technician, Amber / RN, Larry 02/12/2000 06:36:23 PM
Drawer Module Drawer 5-1 B	3 Stocked	3	Thiopental sodium 25mg/ml 500 mg kit injection Thiopental Sodium	3	Technician, Amber / RN, Larry 02/12/2000 04:41:35 PM
Drawer Module Drawer 5-1 B	0 Stocked	0	Thiopental sodium 25mg/ml 500 mg kit injection Thiopental Sodium	3	Technician, Amber / RN, Larry 02/12/2000 04:41:26 PM
<b>Cabinet: Unit Dose Module</b>					
<u>Supply Position</u>	<u>Qty Status</u>	<u>Count Remaining User / System</u>	<u>Generic Name Trade Name</u>	<u>DEA Schedule Defined Class</u>	<u>User / Witness Date</u>
Unit Dose Module Shelf 2-1	15 Stocked	15	Oxycodone/ Acetaminophen 5/325 mg 1 tablet PERCOCET	2	Technician, Amber / RN, Larry 02/13/2000 08:19:58 PM
Unit Dose Module Shelf 2-1	15 Stocked	15	Oxycodone/ Acetaminophen 5/325 mg 1 tablet PERCOCET	2	Technician, Amber / RN, Larry 02/11/2000 03:19:35 PM
Unit Dose Module Shelf 2-2	14 Stocked	15	Oxycodone/ Acetaminophen 5/325 mg 1 tablet PERCOCET	2	Technician, Amber / RN, Larry 02/13/2000 08:19:59 PM
Unit Dose Module Shelf 2-2	8 Stocked	15	Oxycodone/ Acetaminophen 5/325 mg 1 tablet PERCOCET	2	Technician, Amber / RN, Larry 02/12/2000 08:41:16 AM
Unit Dose Module Shelf 2-2	3 Stocked	15	Oxycodone/ Acetaminophen 5/325 mg 1 tablet PERCOCET	2	Technician, Amber / RN, Larry 02/11/2000 03:19:36 PM
Unit Dose Module Shelf 4-1	1 Stocked	6	Cocaine hydrochloride 4% 4 ml topical solution COCAINE TOPICAL SOLUTION	2 ER	Technician, Amber / RN, Larry 02/13/2000 08:19:04 PM
Unit Dose Module Shelf 4-1	6 Stocked	6	Cocaine hydrochloride 4% 4 ml topical solution COCAINE TOPICAL SOLUTION	2 ER	Technician, Amber / RN, Larry 02/11/2000 03:30:06 PM

- If this were a report you wanted to save you would save it in you **“MedSelect Reports” Folder.**



## Section 3

### Demo 1: Creating a Custom Report

**Objective:** To create a custom report that displays the current inventory level stocked at each location, utilizing grouping and sorting to facilitate reading ease.

1. From the **File** menu, select **New**.
2. Select the **MedSelect Landscape** template; then click the **OK** button.

Decide what information you need on the report, remember if you use a **“Stay-Within”** folder you must stay within that folder.

3. Select the following data items for inclusion in this report, these data items are from the **“Stay-within: Supply Inventory”** folder:
  - **Open the Pos. Supply Assignment** folder, select:
    - Pos. Cabinet Location Number
    - Pos. Description
    - Pos. Current Qty
  - **Open the Inv. Supplies** folder, select
    - Inv. Supply Generic Name, Strength, Size, Unit, Form
    - Inv. DEA Schedule

- Click **OK** to close the **Query dialog** box and to execute the query.

**MedSelect®** <Type here to customize title>  
02/28/2008 02:30:55 PM Page 1 of ??

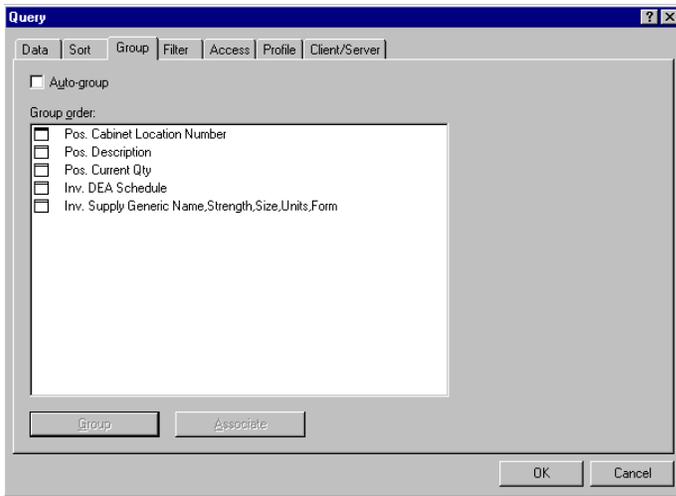
Pos. Cabinet Location Number	Pos. Description	Pos. Current Qty	Inv. Supply Generic Name,Strength,Size,Units,Form	Inv. DEA Schedule
100	Drawer Module Drawer 1-6 B	20	Ibuprofen 800 mg 1 tablet	
100	Unit Dose Module Shelf 2-4	10	Droperidol 2.5mg/1ml 1 ml injection	
100	Mini-Drawer Module Drawer 1-5 A	10	Metoclopramide 10mg/2ml 2 ml injection	
100	Mini-Drawer Module Drawer 1-1 A	10	Naloxone 0.4mg/1ml 1 ml injection	
100	Drawer Module Drawer 2-6 A	10	Diphenhydramine 50mg/1ml 1 ml injection	
100	Drawer Module Drawer 1-4 B	19	Diphenhydramine 25 mg 1 capsule	
100	Unit Dose Module Shelf 4-3	5	Morphine Sulfate 10mg/10ml 10 ml intrathecal	2
Vault	C-2 vault Position 105	17	Morphine Sulfate 10mg/10ml 10 ml intrathecal	2
101	SCM OR1 Position 1	11	Morphine Sulfate 10mg/10ml 10 ml intrathecal	2
101	SCM OR2 Position 5	10	Morphine Sulfate 10mg/10ml 10 ml intrathecal	2
100	Unit Dose Module Shelf 5-2	17	Meperidine 50 mg 1 ml injection	2
Vault	C-2 vault Position 101	454	Meperidine 50 mg 1 ml injection	2
130	Virtual 9 North Position 1-2	9	Meperidine 50 mg 1 ml injection	2
102	SCM PACU Position 2	32	Meperidine 50 mg 1 ml injection	2
101	SCM OR2 Position 2	12	Meperidine 50 mg 1 ml injection	2
100	Unit Dose Module Shelf 5-1	10	Meperidine 75mg/1ml 1 ml injection	2
Vault	C-2 vault Position 202	413	Meperidine 75mg/1ml 1 ml injection	2
130	Virtual 9 North Position 1-3	5	Meperidine 75mg/1ml 1 ml injection	2
102	SCM PACU Position 3	11	Meperidine 75mg/1ml 1 ml injection	2
101	SCM OR2 Position 3	25	Meperidine 75mg/1ml 1 ml injection	2
100	Drawer Module Drawer 3-1 A	10	Acetaminophen 500 mg 1 tablet	
100	Unit Dose Module Shelf 3-1	13	Propoxyphene/Acetaminophen 100/650 1 tablet	4
100	Unit Dose Module Shelf 3-2	15	Propoxyphene/Acetaminophen 100/650 1 tablet	4
Vault	C-III-IV virtual Position 2-301	200	Propoxyphene/Acetaminophen 100/650 1 tablet	4
102	SCM PACU Position 6	7	Propoxyphene/Acetaminophen 100/650 1 tablet	4
130	Virtual 9 North Position 1-5	15	Propoxyphene/Acetaminophen 100/650 1 tablet	4

- Click on any data item in the **Inv Supply Generic Name, Strength, Size, Units, Form** column and **drag** it to the left of the Pos. Description.
- Click on any data item in the **Inv DEA Schedule** column and **drag** it to the left of the Pos. Description

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Pos. Cabinet Location Number	Inv. Supply Generic Name,Strength,Size,Units,Form	Inv. DEA Schedule	Pos. Description	Pos. Current Qty
100	Ibuprofen 800 mg 1 tablet		Drawer Module Drawer 1-6 B	20
100	Droperidol 2.5mg/1ml 1 ml injection		Unit Dose Module Shelf 2-4	10
100	Metoclopramide 10mg/2ml 2 ml injection		Mini-Drawer Module Drawer 1-5 A	10
100	Naloxone 0.4mg/1ml 1 ml injection		Mini-Drawer Module Drawer 1-1 A	10
100	Diphenhydramine 50mg/1ml 1 ml injection		Drawer Module Drawer 2-6 A	10
100	Diphenhydramine 25 mg 1 capsule		Drawer Module Drawer 1-4 B	19
100	Morphine Sulfate 10mg/10ml 10 ml intrathecal	2	Unit Dose Module Shelf 4-3	5
Vault	Morphine Sulfate 10mg/10ml 10 ml intrathecal	2	C-2 vault Position 105	17
101	Morphine Sulfate 10mg/10ml 10 ml intrathecal	2	SCM OR1 Position 1	11
101	Morphine Sulfate 10mg/10ml 10 ml intrathecal	2	SCM OR2 Position 5	10
100	Meperidine 50 mg 1 ml injection	2	Unit Dose Module Shelf 5-2	17
Vault	Meperidine 50 mg 1 ml injection	2	C-2 vault Position 101	454
130	Meperidine 50 mg 1 ml injection	2	Virtual 9 North Position 1-2	9
102	Meperidine 50 mg 1 ml injection	2	SCM PACU Position 2	32
101	Meperidine 50 mg 1 ml injection	2	SCM OR2 Position 2	12
100	Meperidine 75mg/1ml 1 ml injection	2	Unit Dose Module Shelf 5-1	10
Vault	Meperidine 75mg/1ml 1 ml injection	2	C-2 vault Position 202	413
130	Meperidine 75mg/1ml 1 ml injection	2	Virtual 9 North Position 1-3	5
102	Meperidine 75mg/1ml 1 ml injection	2	SCM PACU Position 3	11
101	Meperidine 75mg/1ml 1 ml injection	2	SCM OR2 Position 3	25
100	Acetaminophen 500 mg 1 tablet		Drawer Module Drawer 3-1 A	10
100	Propoxyphene/Acetaminophen 100/650 1 tablet	4	Unit Dose Module Shelf 3-1	13
100	Propoxyphene/Acetaminophen 100/650 1 tablet	4	Unit Dose Module Shelf 3-2	15
Vault	Propoxyphene/Acetaminophen 100/650 1 tablet	4	C-III-IV virtual Position 2-301	200
102	Propoxyphene/Acetaminophen 100/650 1 tablet	4	SCM PACU Position 6	7
130	Propoxyphene/Acetaminophen 100/650 1 tablet	4	Virtual 9 North Position 1-5	15

7. Reopen the **Query dialog** box. (From the **Report** menu, select **Query**.)
8. From the **Group** tab, select **Pos. Cabinet Location Number**, then click on the **Group** button.



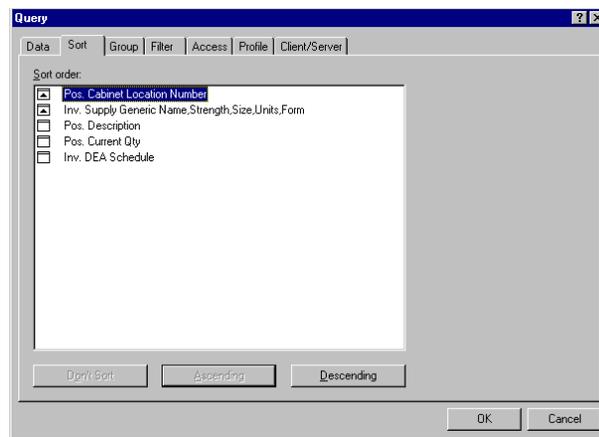
9. Click **OK** to close the **Query dialog** box and to execute the defined grouping.

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02/28/2008 03:58:57 PM Page 1 of ??				
Pos. Cabinet Location Number	Inv. Supply Generic Name,Strength,Size,Units,Form	Inv. DEA Schedule	Pos. Description	Pos. Current Qty
100	Ibuprofen 800 mg 1 tablet		Drawer Module Drawer 1-6 B	20
	Droperidol 2.5mg/1ml 1 ml injection		Unit Dose Module Shelf 2-4	10
	Metoclopramide 10mg/2ml 2 ml injection		Mini-Drawer Module Drawer 1-5 A	10
	Naloxone 0.4mg/1ml 1 ml injection		Mini-Drawer Module Drawer 1-1 A	10
	Diphenhydramine 50mg/1ml 1 ml injection		Drawer Module Drawer 2-6 A	10
	Acetaminophen 500 mg 1 tablet		Drawer Module Drawer 3-1 A	10
	Propoxyphene/Acetaminophen 100/650 1 tablet	4	Unit Dose Module Shelf 3-2	15
	Nifedipine 10 mg 1 capsule		Unit Dose Module Shelf 3-5	10
	R-EPOETIN ALFA 4000 units/1ml 1 ml injection		Refrigerator Position 4	10
	Nifedipine XL 30 mg 1 tablet		Unit Dose Module Shelf 1-2	19
	Heparin Sodium 10,000 units/ml 1 ml injection		Drawer Module Drawer 1-6 A	25
	IV-HEPARIN 25,000units 500 ml infusion		Supply Cabinet Position 4	19
	Heparin flush 100units/1ml 1 ml injection		Drawer Module Drawer 3-4 A	100
	Saline Flush 0.9% 2 ml injection		Unit Dose Module Shelf 5-3	25
	Prochlorperazine 10 mg 1 tablet		Mini-Drawer Module Drawer 1-2 A	10

Notice this one grouping makes the report more readable. However, more can be done to improve this report's readability. Let's view the name of the medications in alphabetical order to make it easier to locate a particular medication.

10. Reopen the **Query dialog** box. (select the **Query Data** button  on the Standard PowerBar.)

11. Select the **Sort** tab; select **Inv. Supply Generic Name, Name, Strength, Size, Form**, then click on the **Ascending** button.



12. Click **OK** to close the **Query** dialog box and to execute the defined sorting

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		02/28/2000 03:53:59 PM	Page 1 of 77	
Pos. Cabinet Location Number	Inv. Supply Generic Name, Strength, Size, Units, Form	Inv. DEA Schedule	Pos. Description	Pos. Current Qty
100	Acetaminophen 500 mg 1 tablet		Drawer Module Drawer 3-1 A	10
	Albuterol 17 gram inhaler		Drawer Module Drawer 3-2 A	6
	Alprazolam 0.25 mg 1 tablet	4	Unit Dose Module Shelf 1-1	10
	Aspirin EC 81 mg 1 tablet		Drawer Module Drawer 1-7 B	10
	Atenolol 50 mg 1 tablet		Drawer Module Drawer 1-2 A	15
	Atropine 0.4mg/1ml 1 ml injection		Drawer Module Drawer 1-2 B	19
	Buffered Aspirin 325 mg 1 tablet		Drawer Module Drawer 3-3 A	42
	Cefuroxime 250 mg 1 tablet		Drawer Module Drawer 1-2 C	14
	Cefuroxime 250mg 10 tablets take home pack		Drawer Module Drawer 2-3 A	10
	Clarithromycin 500 mg 1 tablet		Drawer Module Drawer 1-4 A	19
	Cocaine hydrochloride 4% 4 ml topical solution	2	Unit Dose Module Shelf 4-1	4
	Dexamethasone 4mg/1ml 1 ml injection		Drawer Module Drawer 1-3 A	18
	Diphenhydramine 25 mg 1 capsule		Drawer Module Drawer 1-4 B	19
	Diphenhydramine 50mg/1ml 1 ml injection		Drawer Module Drawer 2-6 A	10
	Docusate/ Casanthranol 1 capsule		Drawer Module Drawer 1-3 C	10
	Droperidol 2.5mg/1ml 1 ml injection		Unit Dose Module Shelf 2-4	10
	Erythromycin 250 mg 1 tablet		Mini-Drawer Module Drawer 1-4 A	10
	Famotidine 20 mg 1 tablet		Drawer Module Drawer 2-2 A	10
	Fentanyl Citrate 0.05mg/2ml 2 ml injection	2	Unit Dose Module Shelf 1-6	3
	Ferrous Sulfate 300 mg 1 tablet		Drawer Module Drawer 1-3 B	29
	Ferrous Sulfate 300 mg 1 tablet		Unit Dose Module Shelf 1-5	20

With this simple sorting and grouping, specific data can be easily found on this report.

To finish this report, it should display a logical description of the report and then saved to the Custom Reports folder.

13. **Double click** on the space reserved for the report title, <Type here to customize title>
14. **Delete** the existing text using the Delete key on the keyboard.
15. Type in a descriptive report title. For this Demo, type in **Demo 3-1 Inventory Summary**.

Pos. Cabinet Location Number	Inv. Supply Generic Name, Strength, Size, Units, Form	Inv. DEA Schedule	Pos. Description	Pos. Current Qty
100	Acetaminophen 500 mg 1 tablet		Drawer Module Drawer 3-1 A	10
	Albuterol 17 gram inhaler		Drawer Module Drawer 3-2 A	6
	Alprazolam 0.25 mg 1 tablet	4	Unit Dose Module Shelf 1-1	10
	Aspirin EC 81 mg 1 tablet		Drawer Module Drawer 1-7 B	10
	Atenolol 50 mg 1 tablet		Drawer Module Drawer 1-2 A	15
	Atropine 0.4mg/1ml 1 ml injection		Drawer Module Drawer 1-2 B	19
	Buffered Aspirin 325 mg 1 tablet		Drawer Module Drawer 3-3 A	42
	Cefuroxime 250 mg 1 tablet		Drawer Module Drawer 1-2 C	14
	Cefuroxime 250mg 10 tablets take home pack		Drawer Module Drawer 2-3 A	10
	Clarithromycin 500 mg 1 tablet		Drawer Module Drawer 1-4 A	19
	Cocaine hydrochloride 4% 4 ml topical solution	2	Unit Dose Module Shelf 4-1	4
	Dexamethasone 4mg/1ml 1 ml injection		Drawer Module Drawer 1-3 A	18
	Diphenhydramine 25 mg 1 capsule		Drawer Module Drawer 1-4 B	19
	Diphenhydramine 50mg/1ml 1 ml injection		Drawer Module Drawer 2-6 A	10
	Docusate/ Casanthranol 1 capsule		Drawer Module Drawer 1-3 C	10
	Droperidol 2.5mg/1ml 1 ml injection		Unit Dose Module Shelf 2-4	10
	Erythromycin 250 mg 1 tablet		Mini-Drawer Module Drawer 1-4 A	10
	Famotidine 20 mg 1 tablet		Drawer Module Drawer 2-2 A	10
	Fentanyl Citrate 0.05mg/2ml 2 ml injection	2	Unit Dose Module Shelf 1-6	3
	Ferrous Sulfate 300 mg 1 tablet		Drawer Module Drawer 1-3 B	29
	Ferrous Sulfate 300 mg 1 tablet		Unit Dose Module Shelf 1-5	20
	Fluoxetine 20 mg 1 Capsule		Drawer Module Drawer 1-5 A	30
	Fluoxetine 20 mg 1 Capsule		Unit Dose Module Shelf 3-3	15
	Furosemide 40mg/4ml 4 ml injection		Drawer Module Drawer 2-5 A	10
	Gelfoam Sponge large 1 sponge topical		Drawer Module Drawer 5-1 A	10
	Heparin Sodium 10,000 units/ml 1 ml injection		Drawer Module Drawer 1-6 A	25

16. Save this report in the **MedSelect Custom Reports** folder as **Demo 3-1 Inventory Summary**.



## Section 3

### Demo 2: Adding data, Calculations, Formatting

**Objective:** To create a custom report and illustrate adding data to a report, then grouping and sorting that data. This report will display the current inventory cost at each nursing area. We will add onto an existing custom report.

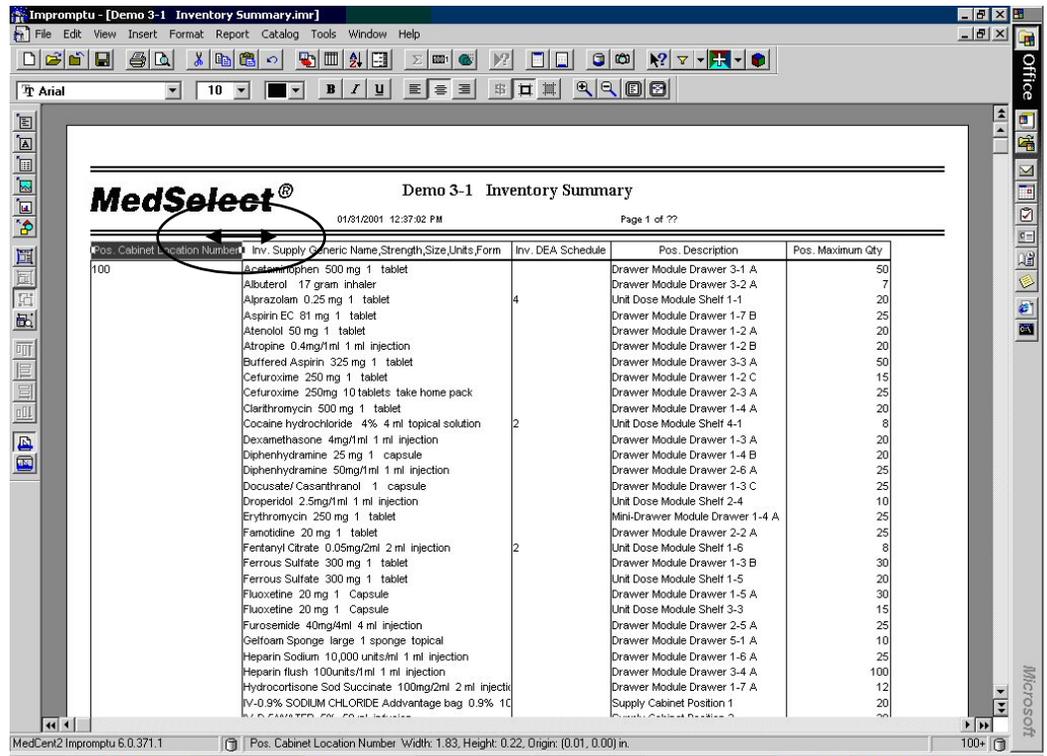
1. From the **File** menu, select **Open**.
2. From the **MedSelect Custom Reports Folder** open **Demo 3-1 Inventory Summary**.
3. Open the **Query dialog** box. (Select the **Query Data** button  on the Standard PowerBar.)

Now we need to add additional information to this report.

4. Select the folder from where this report was created. ("**Stay-within: Supply Inventory**" folder)
5. Within the **Inv. Supplies** subfolder, select the "**Inv. Supply Cost**" data item.
6. Click **OK** to close the **Query dialog** box and to execute the query.

You may need to change the size on the columns to fit all of the data on the width of one page.

- Let's change the width of the **Pos. Cabinet Location Number column**. Highlight the title box, place the cursor over the right handle, once the cursor changes to a double arrow, you can drag it to re-size the width of the entire column.



- With the title box still highlighted, **Right click** and edit the text to "Cabinet Location" Hit **Esc** key.

When we change the width the last column the “**Inv. Supply Cost**” data item will now appear on the same page.

**MedSelect®** Demo 3-1 Inventory Summary  
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Cabinet Location	Inv. Supply	Generic Name, Strength, Size, Units, Form	Inv. DEA Schedule	Pos. Description	Pos. Current Qty	Inv. Supply Cost
100		Acetaminophen 500 mg 1 tablet		Drawer Module Drawer 3-1 A	10	9.e-003
		Albuterol 17 gram inhaler		Drawer Module Drawer 3-2 A	6	9.04
		Alprazolam 0.25 mg 1 tablet	4	Unit Dose Module Shelf 1-1	10	4.4e-002
		Aspirin EC 81 mg 1 tablet		Drawer Module Drawer 1-7 B	10	4.8e-002
		Atenolol 50 mg 1 tablet		Drawer Module Drawer 1-2 A	15	5.31e-002
		Atropine 0.4mg/1ml 1 ml injection		Drawer Module Drawer 1-2 B	19	0.2
		Buffered Aspirin 325 mg 1 tablet		Drawer Module Drawer 3-3 A	42	2.e-002
		Cefuroxime 250 mg 1 tablet		Drawer Module Drawer 1-2 C	14	1.22
		Cefuroxime 250mg 10 tablets take home pack		Drawer Module Drawer 2-3 A	10	12.22
		Clarithromycin 500 mg 1 tablet		Drawer Module Drawer 1-4 A	19	0.75
		Cocaine hydrochloride 4% 4 ml topical solution	2	Unit Dose Module Shelf 4-1	4	3.88
		Dexamethasone 4mg/1ml 1 ml injection		Drawer Module Drawer 1-3 A	18	0.25
		Diphenhydramine 25 mg 1 capsule		Drawer Module Drawer 1-4 B	19	2.45e-002
		Diphenhydramine 50mg/1ml 1 ml injection		Drawer Module Drawer 2-6 A	10	0.18
		Docusate/ Casanthranol 1 capsule		Drawer Module Drawer 1-3 C	10	2.e-002
		Droperidol 2.5mg/1ml 1 ml injection		Unit Dose Module Shelf 2-4	10	2.34
		Erythromycin 250 mg 1 tablet		Mini-Drawer Module Drawer 1-4 A	10	0.12
		Famotidine 20 mg 1 tablet		Drawer Module Drawer 2-2 A	10	7.8e-002
		Fentanyl Citrate 0.05mg/2ml 2 ml injection	2	Unit Dose Module Shelf 1-6	3	0.456
		Ferrous Sulfate 300 mg 1 tablet		Drawer Module Drawer 1-3 B	29	2.77e-002
		Ferrous Sulfate 300 mg 1 tablet		Unit Dose Module Shelf 1-5	20	2.77e-002
		Fluoxetine 20 mg 1 Capsule		Drawer Module Drawer 1-5 A	30	1.82
		Fluoxetine 20 mg 1 Capsule		Unit Dose Module Shelf 3-3	15	1.82
		Furosemide 40mg/4ml 4 ml injection		Drawer Module Drawer 2-5 A	10	0.26
		Gelfoam Sponge large 1 sponge topical		Drawer Module Drawer 5-1 A	10	22.72
		Heparin Sodium 10,000 units/ml 1 ml injection		Drawer Module Drawer 1-6 A	25	0.4

The **Inv. Supply Cost** needs to be formatted properly.

9. **Highlight** the entire column, by placing the cursor at the top of the column until it turns to a down arrow, and click.

**MedSelect®** Demo 3-1 Inventory Summary

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Page 1 ??

Cabinet Location	Inv. Supply Generic Name,Strength,Size,Units,Form	Inv. DEA Schedule	Pos. Description	Pos. Current Qty	Inv. Sub Cost
100	Acetaminophen 500 mg 1 tablet		Drawer Module Drawer 3-1 A	10	9.e-003
	Albuterol 17 gram inhaler		Drawer Module Drawer 3-2 A	6	9.e-003
	Alprazolam 0.25 mg 1 tablet	4	Unit Dose Module Shelf 1-1	10	4.4e-002
	Aspirin EC 81 mg 1 tablet		Drawer Module Drawer 1-7 B	10	4.8e-002
	Atenolol 50 mg 1 tablet		Drawer Module Drawer 1-2 A	15	5.31e-002
	Atropine 0.4mg/1ml 1 ml injection		Drawer Module Drawer 1-2 B	19	0.2
	Buffered Aspirin 325 mg 1 tablet		Drawer Module Drawer 3-3 A	42	2.e-002
	Cefuroxime 250 mg 1 tablet		Drawer Module Drawer 1-2 C	14	1.22
	Cefuroxime 250mg 10 tablets take home pack		Drawer Module Drawer 2-3 A	10	12.22
	Clarithromycin 500 mg 1 tablet		Drawer Module Drawer 1-4 A	19	0.75
	Cocaine hydrochloride 4% 4 ml topical solution	2	Unit Dose Module Shelf 4-1	4	3.88

10. Go to **Format**, **Data**, from the Data tab and the Positive box, select from the drop down menu, **“0.00”**

**Save** this report in your **MedSelect Custom Reports** folder as **“ Demo 3-2 Inventory Costs”**, and change the report title to **“Demo 3-2 Inventory Costs”**.

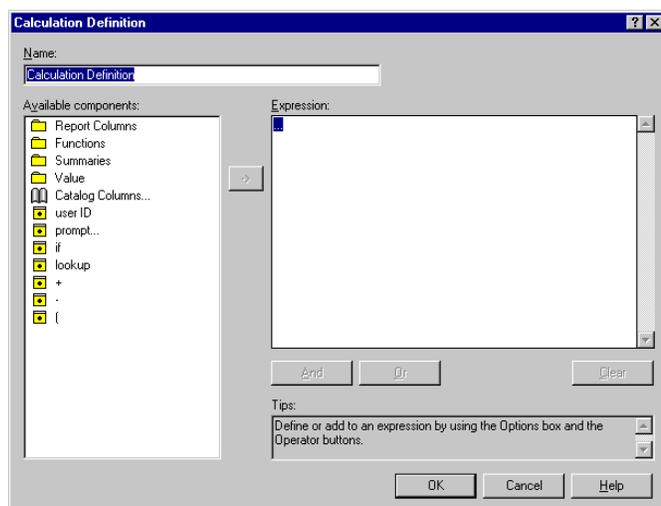
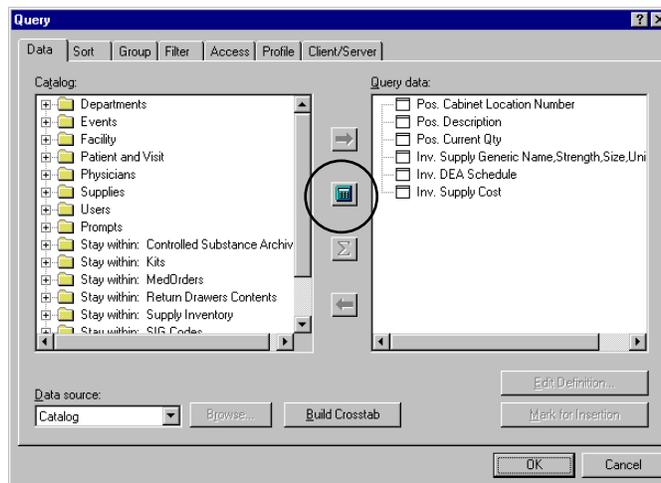
**MedSelect®** Demo 3-2 Inventory Costs  
02/29/2000 10:18:39 AM Page 1 of ??

Cabinet Location	Inv. Supply Generic Name, Strength, Size, Units, Form	Inv. DEA Schedule	Pos. Description	Pos. Current Qty	Inv. Supply Cost
100	Acetaminophen 500 mg 1 tablet		Drawer Module Drawer 3-1 A	10	0.01
	Albuterol 17 gram inhaler		Drawer Module Drawer 3-2 A	6	9.04
	Alprazolam 0.25 mg 1 tablet	4	Unit Dose Module Shelf 1-1	10	0.04
	Aspirin EC 81 mg 1 tablet		Drawer Module Drawer 1-7 B	10	0.05
	Atenolol 50 mg 1 tablet		Drawer Module Drawer 1-2 A	15	0.05
	Atropine 0.4mg/1ml 1 ml injection		Drawer Module Drawer 1-2 B	19	0.20
	Buffered Aspirin 325 mg 1 tablet		Drawer Module Drawer 3-3 A	42	0.02
	Cefuroxime 250 mg 1 tablet		Drawer Module Drawer 1-2 C	14	1.22
	Cefuroxime 250mg 10 tablets take home pack		Drawer Module Drawer 2-3 A	10	12.22
	Clarithromycin 500 mg 1 tablet		Drawer Module Drawer 1-4 A	19	0.75
	Cocaine hydrochloride 4% 4 ml topical solution	2	Unit Dose Module Shelf 4-1	4	3.88
	Dexamethasone 4mg/1ml 1 ml injection		Drawer Module Drawer 1-3 A	18	0.25
	Diphenhydramine 25 mg 1 capsule		Drawer Module Drawer 1-4 B	19	0.02
	Diphenhydramine 50mg/1ml 1 ml injection		Drawer Module Drawer 2-6 A	10	0.18
	Docusate/ Casanthranol 1 capsule		Drawer Module Drawer 1-3 C	10	0.02
	Droperidol 2.5mg/1ml 1 ml injection		Unit Dose Module Shelf 2-4	10	2.34
	Erythromycin 250 mg 1 tablet		Mini-Drawer Module Drawer 1-4 A	10	0.12
	Famotidine 20 mg 1 tablet		Drawer Module Drawer 2-2 A	10	0.08
	Fentanyl Citrate 0.05mg/2ml 2 ml injection	2	Unit Dose Module Shelf 1-6	3	0.46
	Ferrous Sulfate 300 mg 1 tablet		Drawer Module Drawer 1-3 B	29	0.03
	Ferrous Sulfate 300 mg 1 tablet		Unit Dose Module Shelf 1-6	20	0.03
	Fluoxetine 20 mg 1 Capsule		Drawer Module Drawer 1-5 A	30	1.82
	Fluoxetine 20 mg 1 Capsule		Unit Dose Module Shelf 3-3	15	1.82
	Furosemide 40mg/4ml 4 ml injection		Drawer Module Drawer 2-5 A	10	0.28

Now we need a calculation to figure out the cost of the stocked inventory per position.

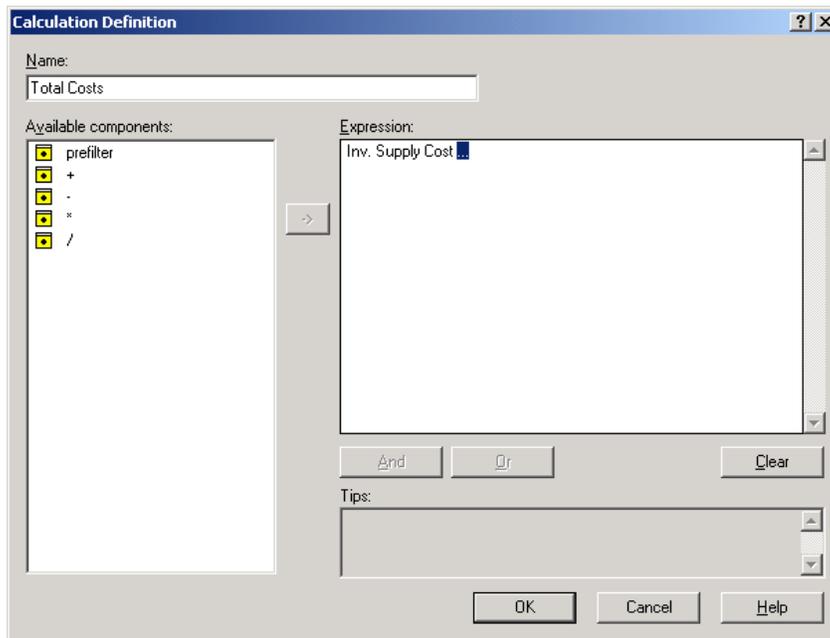
Let's display the total cost of medications in each Location. The definition of total cost of medications by position, for this example, is the supply cost times the position quantity (**Total Cost = Supply Cost \* Position Quantity**).

11. Open the **Query dialog** box. (Select the **Query Data** button  on the Standard PowerBar.)
12. From the **Data** tab of the **Query dialog** box, click on the **Calculate** button.



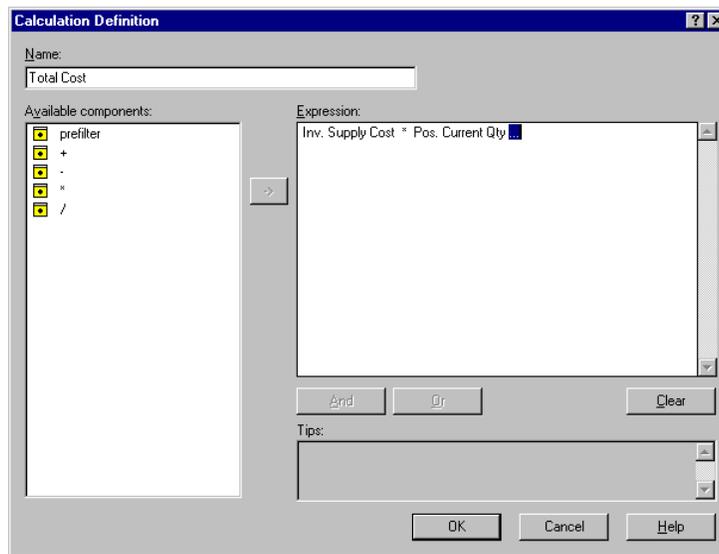
The **Calculation Definition dialog** box is displayed.

13. In the **Name** text box, type in the name of this calculation, such as **Total Cost**.
14. Open the **Report Columns** folder.
15. Double click on **Inv. Supply Cost**.



**Inv. Supply Cost** is now displayed in the Expression box.

16. Double-click on the **multiplication sign ( \* )**.
17. Open the **Report Column** folder.
18. Double click on **POS. Current Qty**.



Your calculation is complete.

19. Click on **OK** to accept this calculation description.

This newly created data does not fit on the width of one page; we need to make one or more columns narrower.

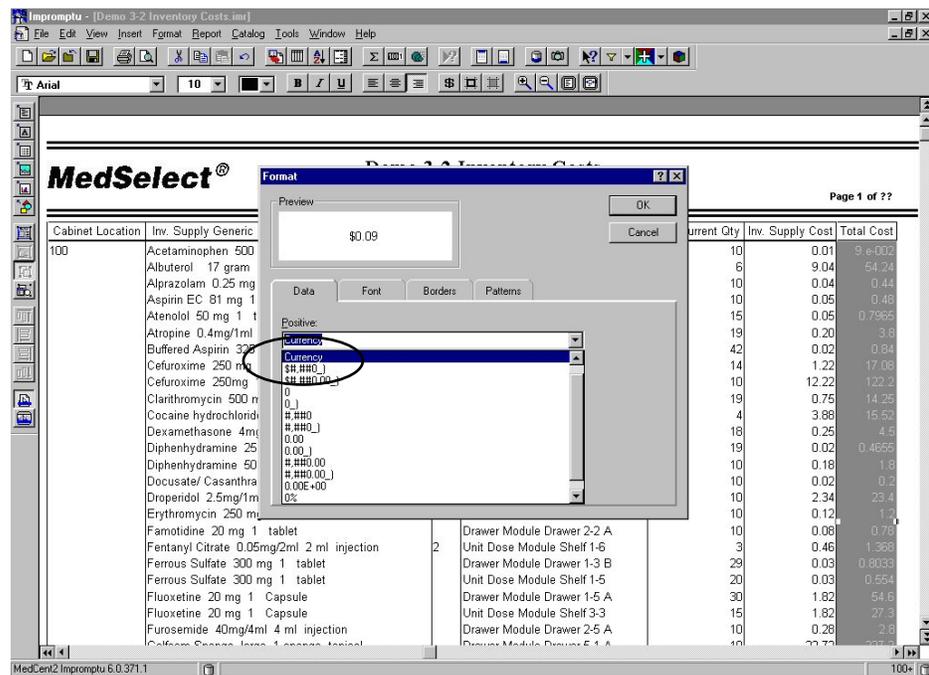
20. The column width for **"Inv. DEA Schedule"** can be changed, Select the column header and Right **Click** and Select **Edit**. Delete the Inv. and Schedule; hit **Esc**.

**MedSelect® Demo 3-2 Inventory Costs**  
02/28/2000 10:29:06 AM Page 1 of ??

Cabinet Location	Inv. Supply	Generic Name, Strength, Size, Unit	Form	Inv. DEA Schedule	Pos. Description	Pos. Current Qty	Inv. Supply Cost	Total Cost
100		Acetaminophen 500 mg 1 tablet			Drawer Module Drawer 3-1 A	10	0.01	9.e-002
		Albuterol 17 gram inhaler			Drawer Module Drawer 3-2 A	6	9.04	54.24
		Alprazolam 0.25 mg 1 tablet	4		Unit Dose Module Shelf 1-1	10	0.04	0.44
		Aspirin EC 81 mg 1 tablet			Drawer Module Drawer 1-7 B	10	0.05	0.48
		Atenolol 50 mg 1 tablet			Drawer Module Drawer 1-2 A	15	0.05	0.7965
		Atropine 0.4mg/1ml 1 ml injection			Drawer Module Drawer 1-2 B	19	0.20	3.8
		Buffered Aspirin 325 mg 1 tablet			Drawer Module Drawer 3-3 A	42	0.02	0.84
		Cefuroxime 250 mg 1 tablet			Drawer Module Drawer 1-2 C	14	1.22	17.08
		Cefuroxime 250mg 10 tablets take home pack			Drawer Module Drawer 2-3 A	10	12.22	122.2
		Clarithromycin 500 mg 1 tablet			Drawer Module Drawer 1-4 A	19	0.75	14.25
		Cocaine hydrochloride 4% 4 ml topical solution	2		Unit Dose Module Shelf 4-1	4	3.88	15.52
		Dexamethasone 4mg/1ml 1 ml injection			Drawer Module Drawer 1-3 A	18	0.25	4.5
		Diphenhydramine 25 mg 1 capsule			Drawer Module Drawer 1-4 B	19	0.02	0.4655
		Diphenhydramine 50mg/1ml 1 ml injection			Drawer Module Drawer 2-6 A	10	0.18	1.8
		Docusate/ Casanthranol 1 capsule			Drawer Module Drawer 1-3 C	10	0.02	0.2
		Droperidol 2.5mg/1ml 1 ml injection			Unit Dose Module Shelf 2-4	10	2.34	23.4
		Erythromycin 250 mg 1 tablet			Mini-Drawer Module Drawer 1-4 A	10	0.12	1.2
		Famotidine 20 mg 1 tablet			Drawer Module Drawer 2-2 A	10	0.08	0.78
		Fentanyl Citrate 0.05mg/2ml 2 ml injection	2		Unit Dose Module Shelf 1-6	3	0.46	1.368
		Ferrous Sulfate 300 mg 1 tablet			Drawer Module Drawer 1-3 B	29	0.03	0.8033
		Ferrous Sulfate 300 mg 1 tablet			Unit Dose Module Shelf 1-5	20	0.03	0.554
		Fluoxetine 20 mg 1 Capsule			Drawer Module Drawer 1-5 A	30	1.82	54.6
		Fluoxetine 20 mg 1 Capsule			Unit Dose Module Shelf 3-3	15	1.82	27.3
		Furosemide 40mg/4ml 4 ml injection			Drawer Module Drawer 2-5 A	10	0.26	2.6
		Salicylic Acid 1 capsule topical			Drawer Module Drawer 5-1 A	10	23.73	237.3

MedCent2 Impromptu 6.0.371.1 | Inv. DEA Schedule Width: 0.33, Height: 0.22, Origin: (4.42, 0.00) in. | 100%

21. Highlight and format the **Total Cost** column to reflect currency.



22. Once selected click **OK** at the format window

23. **Save** this report

Cabinet Location	Inv. Supply	Generic Name, Strength, Size, Units, Form	DEA	Pos. Description	Pos. Current Qty	Inv. Supply Cost	Total Cost
100		Acetaminophen 500 mg 1 tablet		Drawer Module Drawer 3-1 A	10	0.01	\$0.09
		Albuterol 17 gram inhaler		Drawer Module Drawer 3-2 A	6	9.04	\$54.24
		Alprazolam 0.25 mg 1 tablet	4	Unit Dose Module Shelf 1-1	10	0.04	\$0.44
		Aspirin EC 81 mg 1 tablet		Drawer Module Drawer 1-7 B	10	0.05	\$0.48
		Atenolol 50 mg 1 tablet		Drawer Module Drawer 1-2 A	15	0.05	\$0.80
		Atropine 0.4mg/1ml 1 ml injection		Drawer Module Drawer 1-2 B	19	0.20	\$3.80
		Buffered Aspirin 325 mg 1 tablet		Drawer Module Drawer 3-3 A	42	0.02	\$0.84
		Cefuroxime 250 mg 1 tablet		Drawer Module Drawer 1-2 C	14	1.22	\$17.08
		Cefuroxime 250mg 10 tablets take home pack		Drawer Module Drawer 2-3 A	10	12.22	\$122.20
		Clarithromycin 500 mg 1 tablet		Drawer Module Drawer 1-4 A	19	0.75	\$14.25
		Cocaine hydrochloride 4% 4 ml topical solution	2	Unit Dose Module Shelf 4-1	4	3.88	\$15.52
		Dexamethasone 4mg/1ml 1 ml injection		Drawer Module Drawer 1-3 A	18	0.25	\$4.50
		Diphenhydramine 25 mg 1 capsule		Drawer Module Drawer 1-4 B	19	0.02	\$0.47
		Diphenhydramine 50mg/1ml 1 ml injection		Drawer Module Drawer 2-6 A	10	0.18	\$1.80
		Docusate/ Casanthranol 1 capsule		Drawer Module Drawer 1-3 C	10	0.02	\$0.20
		Droperidol 2.5mg/1ml 1 ml injection		Unit Dose Module Shelf 2-4	10	2.34	\$23.40
		Erythromycin 250 mg 1 tablet		Mini-Drawer Module Drawer 1-4 A	10	0.12	\$1.20
		Famotidine 20 mg 1 tablet		Drawer Module Drawer 2-2 A	10	0.08	\$0.78
		Fentanyl Citrate 0.05mg/2ml 2 ml injection	2	Unit Dose Module Shelf 1-6	3	0.46	\$1.37
		Ferrous Sulfate 300 mg 1 tablet		Drawer Module Drawer 1-3 B	29	0.03	\$0.80
		Ferrous Sulfate 300 mg 1 tablet		Unit Dose Module Shelf 1-5	20	0.03	\$0.55
		Fluoxetine 20 mg 1 Capsule		Drawer Module Drawer 1-5 A	30	1.82	\$54.60
		Fluoxetine 20 mg 1 Capsule		Unit Dose Module Shelf 3-3	15	1.82	\$27.30
		Furosemide 40mg/4ml 4 ml injection		Drawer Module Drawer 2-5 A	10	0.28	\$2.80
		Calcium Sulfate 1000mg 1 capsule topical		Drawer Module Drawer 5-1 A	10	22.70	\$227.00

Now we would like a total cost per location.

24. Place the cursor over the **Total Costs** column that was just created
25. When the cursor turns into the down arrow, click on your mouse to highlight the column.
26. Click the Sum button  on the **Standard Powerbar**.

Page down, by using the double arrows in the scroll bar, until you see multiple stations. The SUM function gave us the sum for each Location.

Now let's do some additional formatting to make the report more intuitive to the reader.

27. Go to the menu bar **Insert, Text Frame**. The cursor will carry a box with an A in it. Draw a box next to one of the totals starting with the upper left corner and drawing it to the lower left corner. Release the mouse.
28. Title in the text **Location Total**

If you wish to do any additional formatting simply highlight the Text Frame and in this case the Total frame, right click, go to format. This will allow you to make it bold, change the size, or color. Any change to one box will change it for the entire report.

Cabinet Location	Inv. Supply	Generic Name, Strength, Size, Units, Form	DEA	Pos. Description	Pos. Current Qty	Inv. Supply Cost	Total Cost
100...		Saline Flush 0.9% 2 ml injection		Unit Dose Module Shelf 5-3	25	0.43	\$10.72
		Sufentanil 50 mcg/1ml 1 ml injection	2	Unit Dose Module Shelf 2-5	10	9.23	\$92.30
		Temazepam 30 mg 1 capsule	4	Unit Dose Module Shelf 3-4	10	0.04	\$0.40
		Thiopental sodium 25mg/ml 500 mg kit injection	3	Drawer Module Drawer 5-1 B	10	2.33	\$23.30
		Warfarin 7.5 mg 1 tablet		Mini-Drawer Module Drawer 1-8 A	10	0.04	\$0.36
		promethazine 25mg/1ml 1 ml injection		Mini-Drawer Module Drawer 1-7 A	10	0.09	\$0.90
		propofol 1% 50 ml injection		Drawer Module Drawer 4-4 A	19	2.33	\$44.27
<b>Location Total:</b>							<b>\$3,550.38</b>
101		Fentanyl Citrate 0.05mg/2ml 2 ml injection	2	SCM OR1 Position 6	10	0.46	\$4.56
		Fentanyl Citrate 0.05mg/2ml 2 ml injection	2	SCM OR2 Position 1	8	0.46	\$3.65
		Meperidine 50 mg 1 ml injection	2	SCM OR2 Position 2	12	0.36	\$4.27
		Meperidine 75mg/1ml 1 ml injection	2	SCM OR2 Position 3	25	0.39	\$9.65
		Midazolam 50mg/10ml 10 ml injection	4	SCM OR1 Position 5	18	65.90	\$1,186.20
		Midazolam 50mg/10ml 10 ml injection	4	SCM OR2 Position 4	10	65.90	\$659.00
		Morphine 10mg/1ml 1 ml injection	2	SCM OR1 Position 4	5	0.51	\$2.55
		Morphine 10mg/1ml 1 ml injection	2	SCM OR2 Position 6	10	0.51	\$5.10
		Morphine Sulfate 10mg/10ml 10 ml intrathecal	2	SCM OR1 Position 1	11	1.91	\$20.99
		Morphine Sulfate 10mg/10ml 10 ml intrathecal	2	SCM OR2 Position 5	10	1.91	\$19.08
		Sufentanil 50 mcg/1ml 1 ml injection	2	SCM OR1 Position 2	23	9.23	\$212.29
		Thiopental sodium 25mg/ml 500 mg kit injection	3	SCM OR1 Position 3	0	2.33	\$0.00
<b>Location Total:</b>							<b>\$2,127.34</b>
102		Alprazolam 0.25 mg 1 tablet	4	SCM PACU Position 8	9	0.04	\$0.40

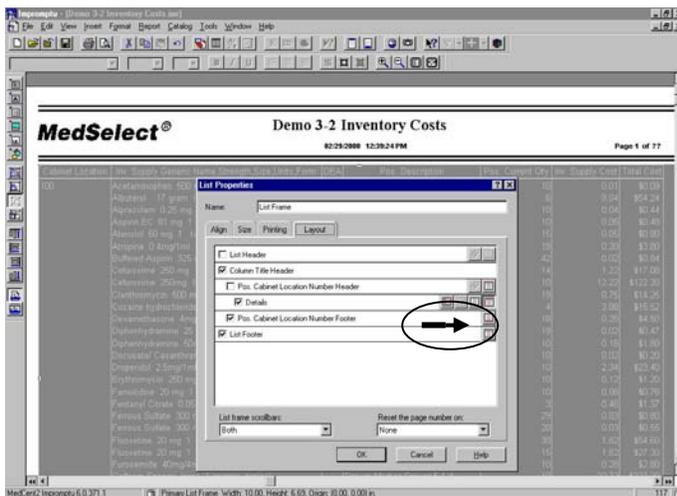
27. Save this report.

## Section 3 Demo 3: Page Breaks

**Objective:** Show the principles of how to set the page breaks on reports.

If you would like to add a page break for each location:

1. Open the Saved Report **Demo 3-2 Inventory Costs**.
2. Highlight any data item on your report, go to **Edit, Select Parent** until all the data on the report is selected. Or use the **Select Parent** Icon , until the report data is selected.
3. Go to **Format, Properties**. or, right click and select **Properties**.
4. **Page Breaks** are chosen from the **List Properties dialog** box under the **Layout** tab.
5. Select the **Page break** to meet your need; in this case we will break for each **Location**.
6. **Position cursor** to icon following Pos. Cabinet Location Number Footer and **click** to toggle page break on.



You will now have a **page break** for each **Location**.

Impromptu - [Demo 3-2 Inventory Costs.imi]

File Edit View Insert Format Report Catalog Tools Window Help

**MedSelect®** Demo 3-2 Inventory Costs

02/29/2000 12:43:31 PM Page 4 of ??

Cabinet Location	Inv. Supply	Generic Name, Strength, Size, Units, Form	DEA	Pos. Description	Pos. Current Qty	Inv. Supply Cost	Total Cost
101	Fentanyl Citrate	0.05mg/2ml 2 ml injection	2	SCM OR1 Position 6	10	0.46	\$4.56
	Fentanyl Citrate	0.05mg/2ml 2 ml injection	2	SCM OR2 Position 1	8	0.46	\$3.65
	Meperidine	50 mg 1 ml injection	2	SCM OR2 Position 2	12	0.36	\$4.27
	Meperidine	75mg/1ml 1 ml injection	2	SCM OR2 Position 3	25	0.39	\$9.65
	Midazolam	50mg/10ml 10 ml injection	4	SCM OR1 Position 5	18	65.90	\$1,186.20
	Midazolam	50mg/10ml 10 ml injection	4	SCM OR2 Position 4	10	65.90	\$659.00
	Morphine	10mg/1ml 1 ml injection	2	SCM OR1 Position 4	5	0.51	\$2.55
	Morphine	10mg/1ml 1 ml injection	2	SCM OR2 Position 6	10	0.51	\$5.10
	Morphine Sulfate	10mg/10ml 10 ml intrathecal	2	SCM OR1 Position 1	11	1.91	\$20.99
	Morphine Sulfate	10mg/10ml 10 ml intrathecal	2	SCM OR2 Position 5	10	1.91	\$19.08
	Sufentanil	50 mcg/1ml 1 ml injection	2	SCM OR1 Position 2	23	9.23	\$212.29
	Thiopental sodium	25mg/ml 500 mg kit injection	3	SCM OR1 Position 3	0	2.33	\$0.00
<b>Location Total:</b>						<b>\$2,127.34</b>	

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7. Save this report **Demo 3-3 Page Breaks**, in the **MedSelect Custom Reports Folder**.

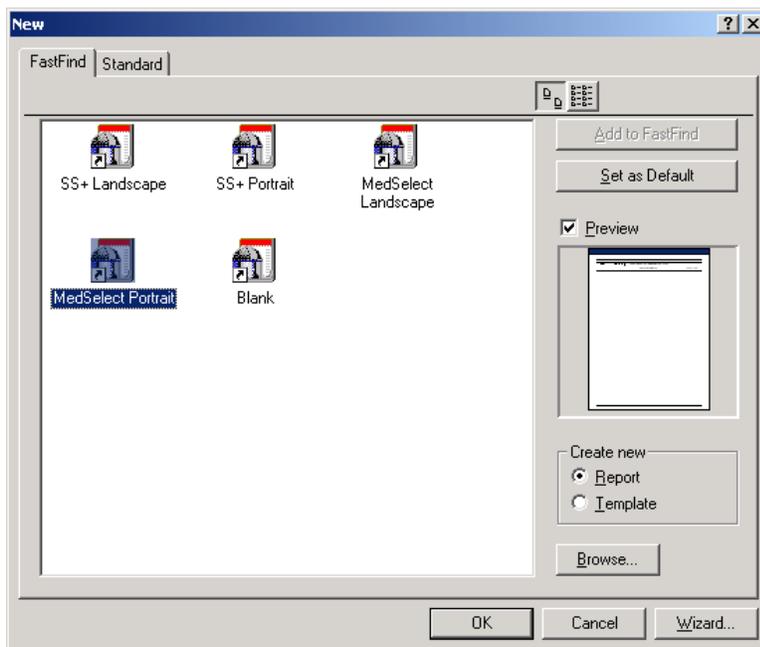
## Section 4

### Demo 1: Prompt Filters

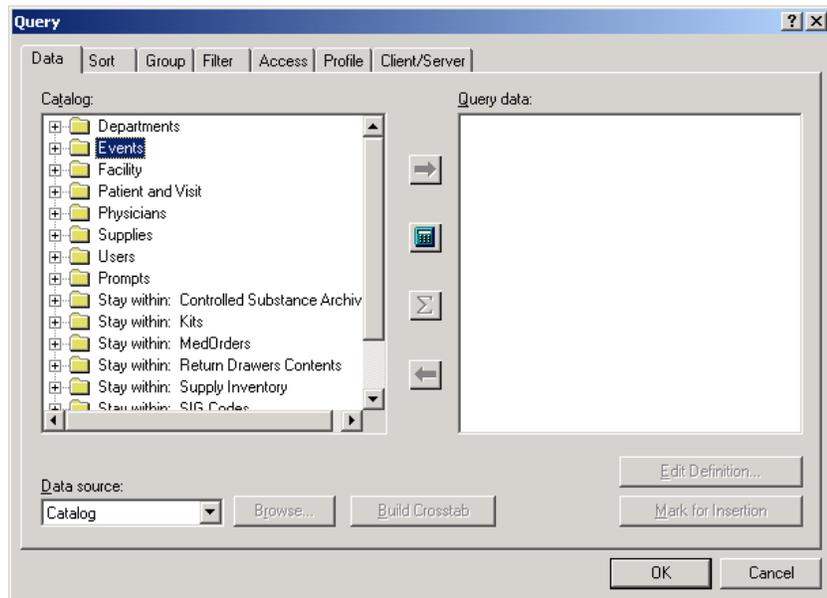
**Objective:** To create a custom report with a date range prompt filter using the Portrait Template

Let's first create a report to look at recent users at any DT.

1. From the **File** menu, select **New**.
2. Select the **MedSelect Portrait** template.

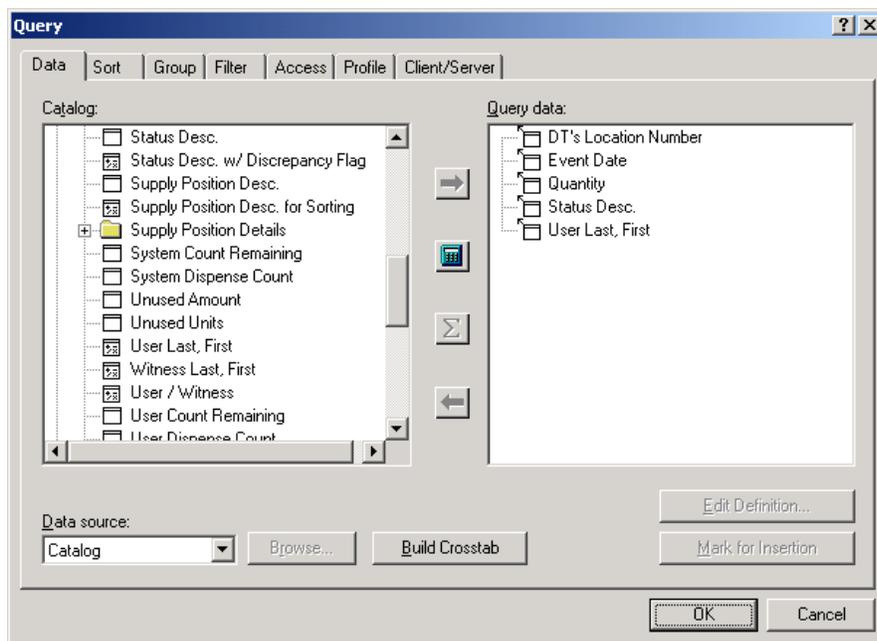


3. Select the **Events** folder.

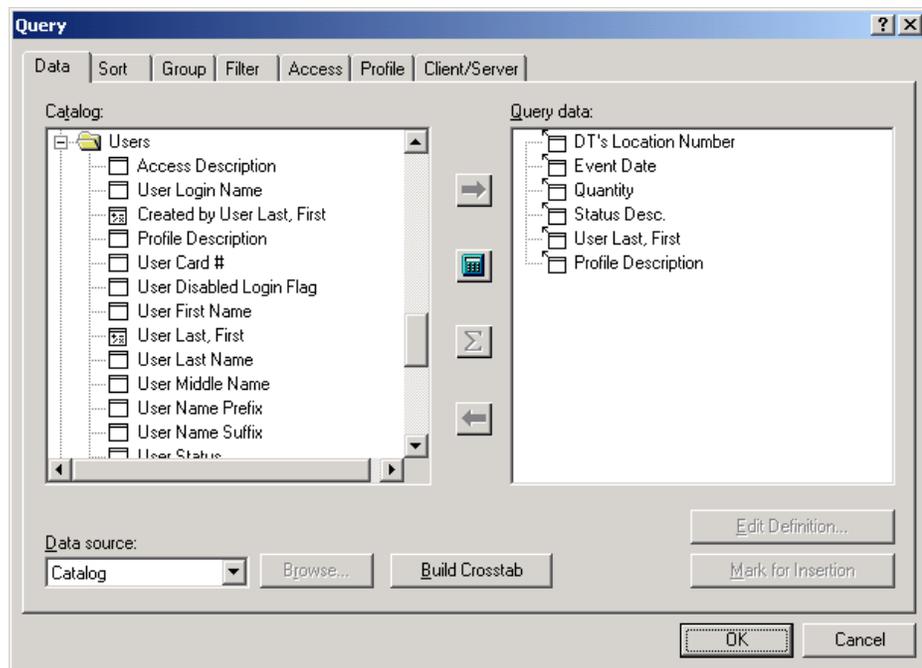


4. From the **Events** folder, select:

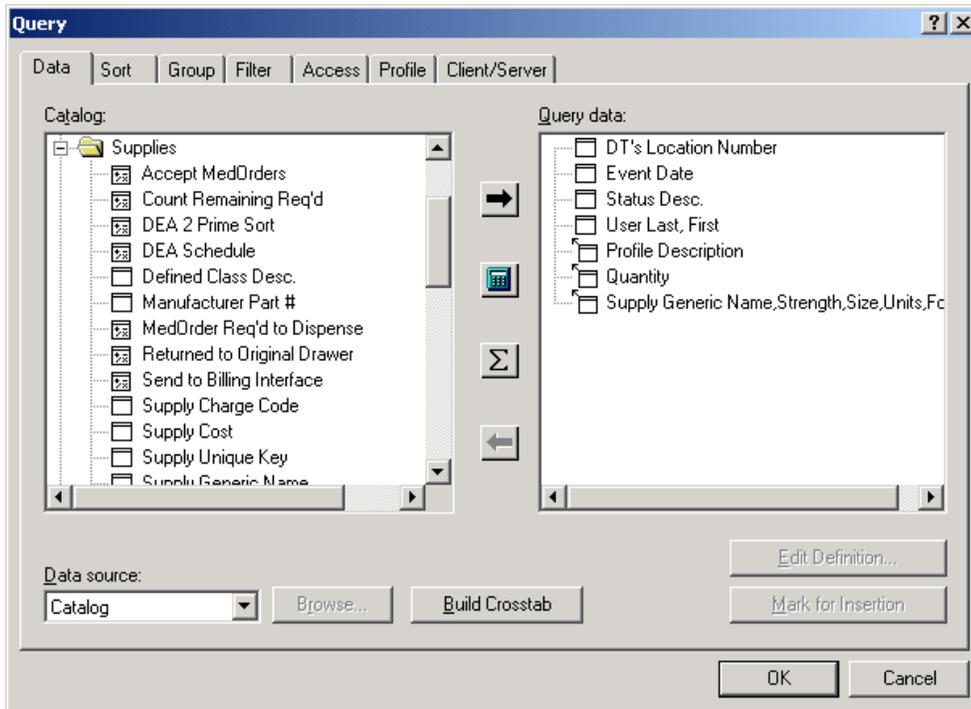
- DT's Location Number
- Event Date
- Quantity
- Status Desc.
- User Last, First



5. From the **Users** folder, select:
  - Profile Description

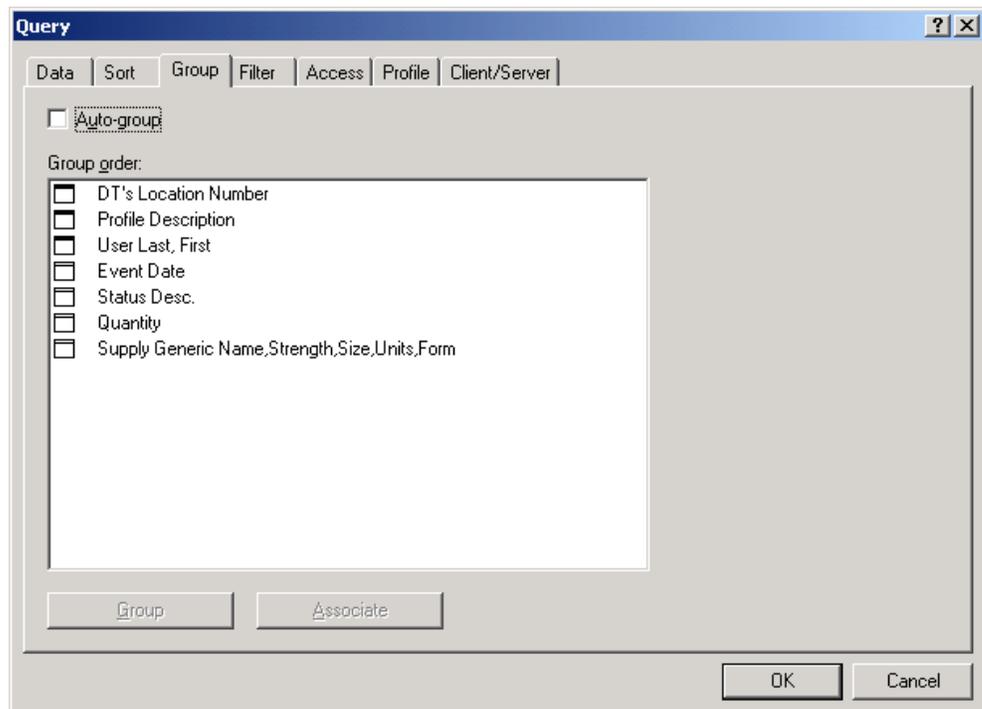


6. From the **Supplies** folder select:
- Supply Generic Name, Strength, Size, Units, Form



7. Select the **Group Tab**, and group the following:

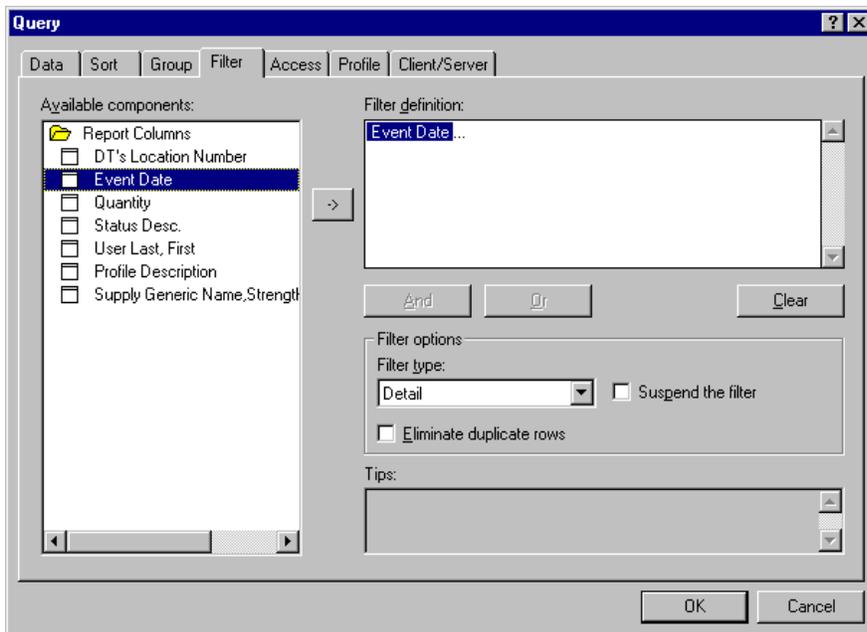
- DT's Location Number
- Profile Description
- User Last, First



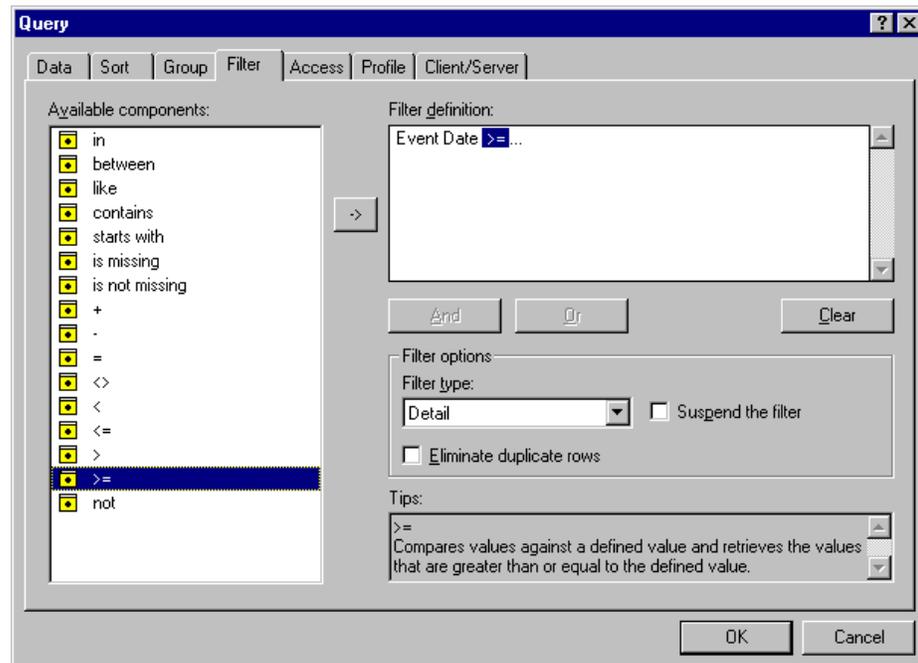
Now let's create a filter to set the report to look at User access of the DT for 1 week. In order to obtain the data needed from database efficiently, it is necessary to use both a detail and summary filter.

The detail filter processes at the server and the summary filter processes at the PC ensuring maximum processing speed and minimal pull on the server.

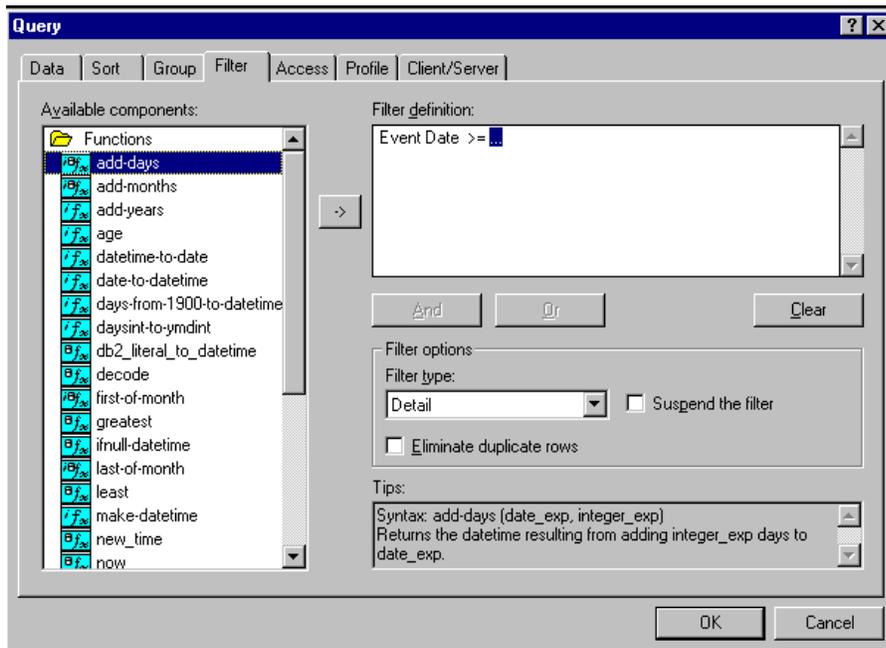
8. In the **Query Dialog Box** select the **filter** tab.
9. Under **Report Columns** select **Event Date**



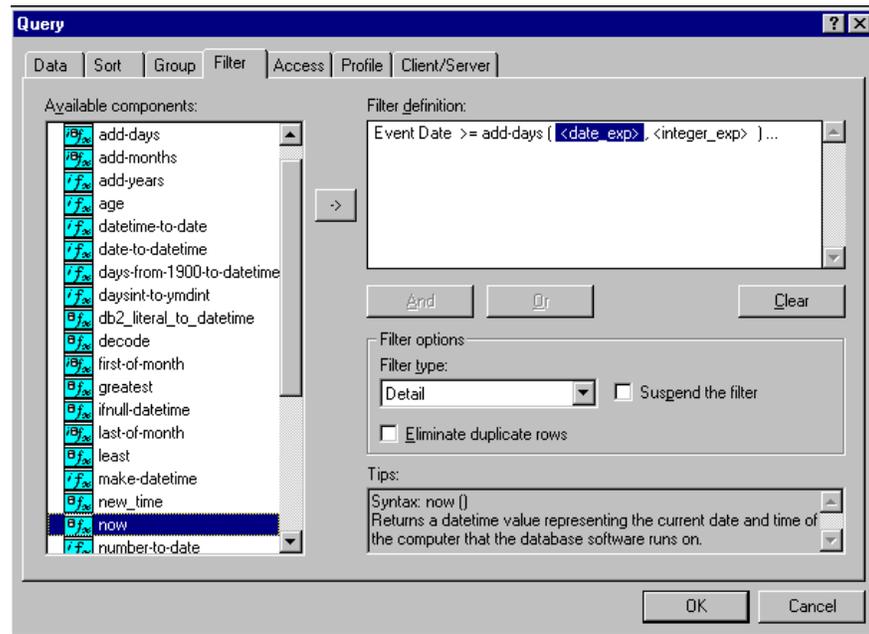
10. Next select  $\geq$ .



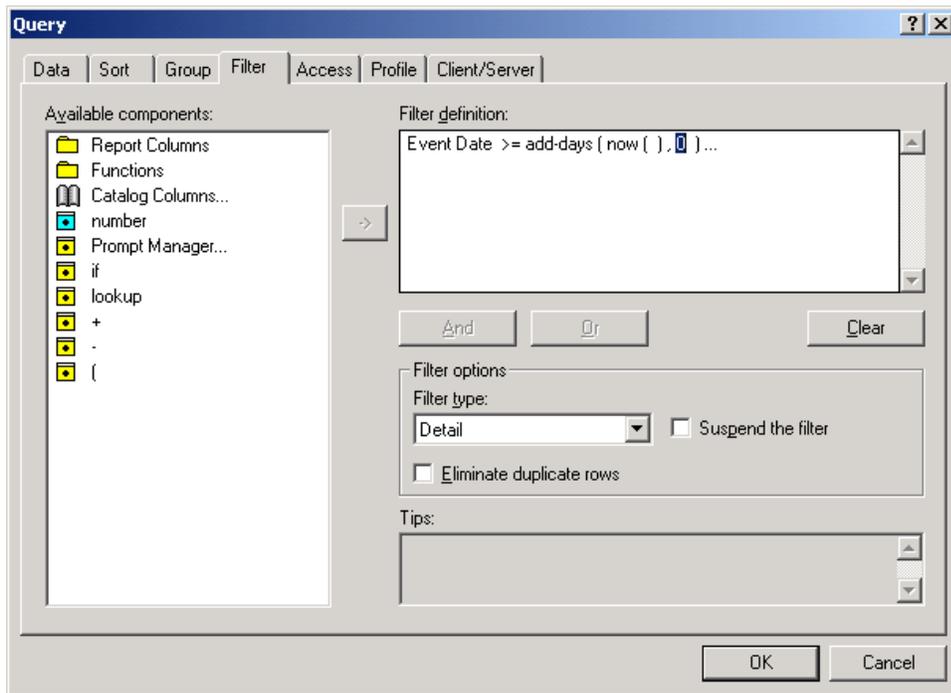
11. From the **Function** list, select **Add-Days**.



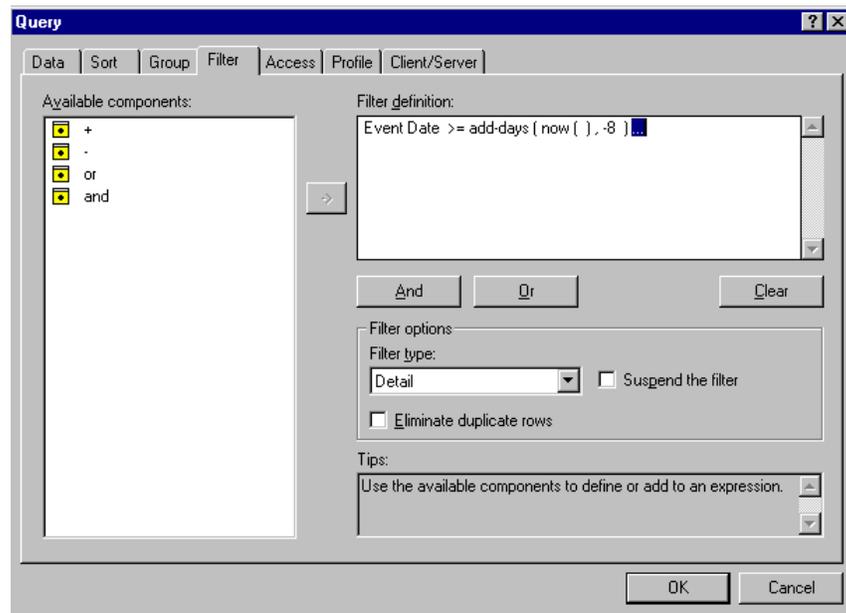
12. From the **Functions** select **Now**.



13. **Double** click on **Number**.

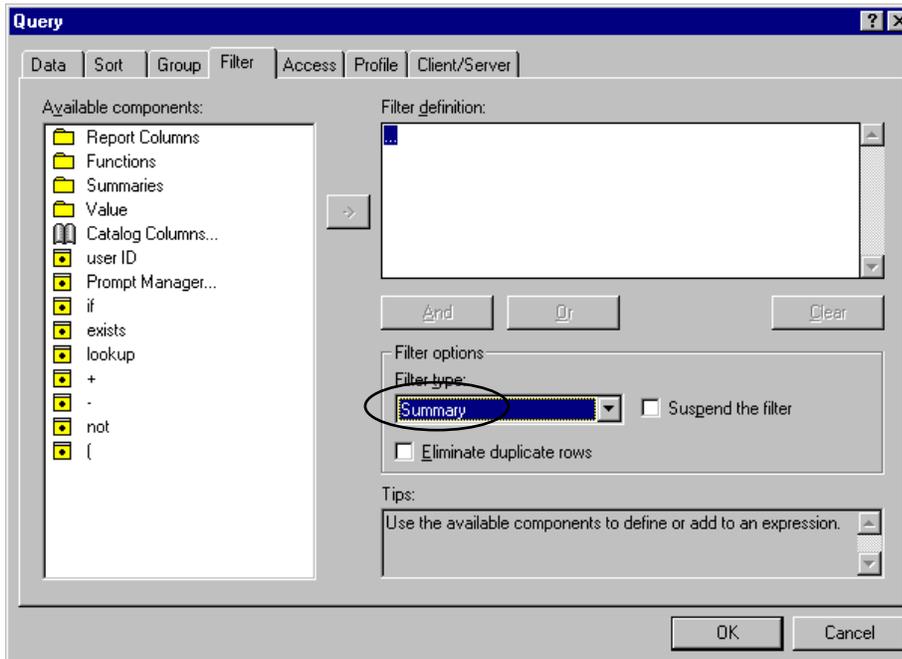


14. Change the **zero** to **-8**.

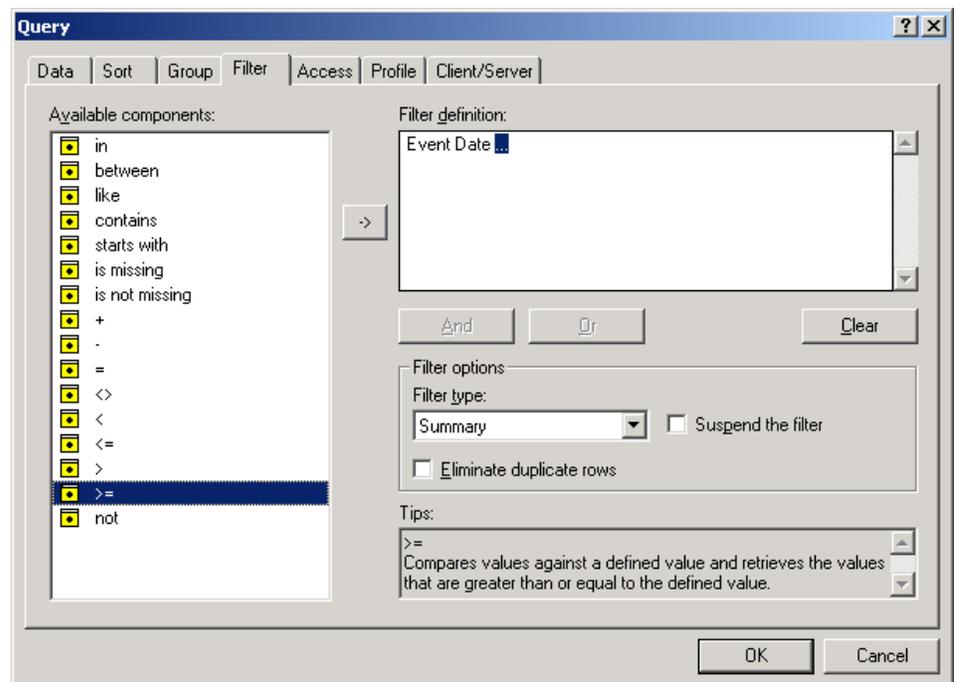


The above filter definition will retrieve all events from the time the Report was Run {now ()}, to 8 days earlier.

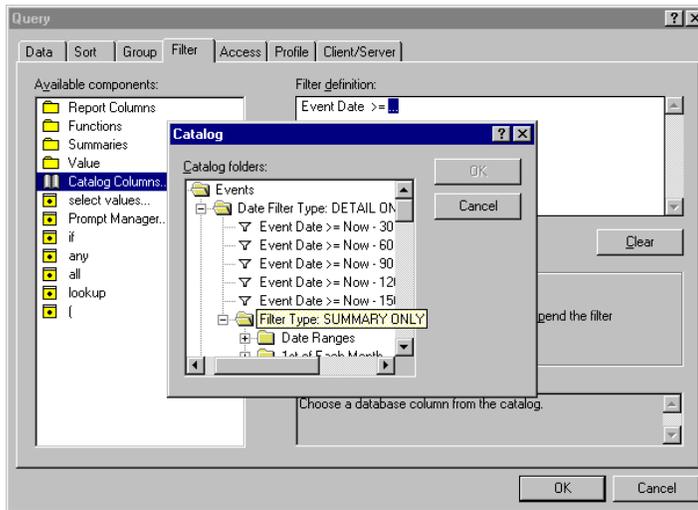
15. From **Filter options**, change the filter type to **Summary**.



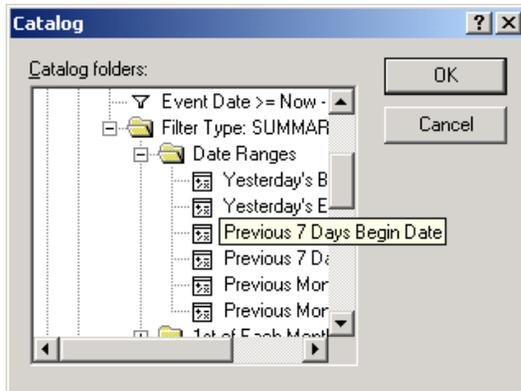
19. From the Available components box select **Report Columns** and then **Event Date**.
20. Select **>=**.



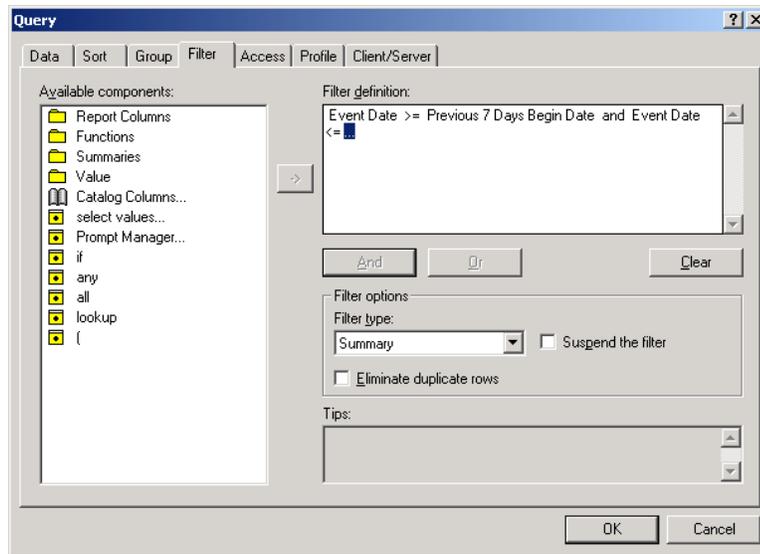
21. Select **Catalog Columns...**
22. From the Catalog Columns... open the **Events** folder. Open **Date Filter Type: DETAIL ONLY**.



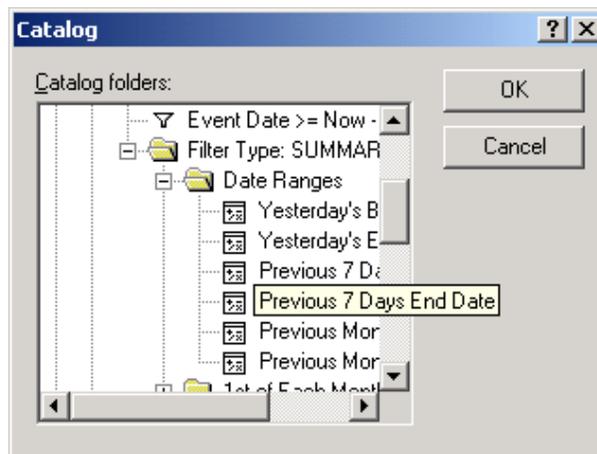
23. **Double click** to open the **Filter Type: SUMMARY ONLY**. Double click on **Date Ranges**. Double Click on **Previous 7 Days Begin Date** to add to report filter. This returns the previous 7 days, from midnight.



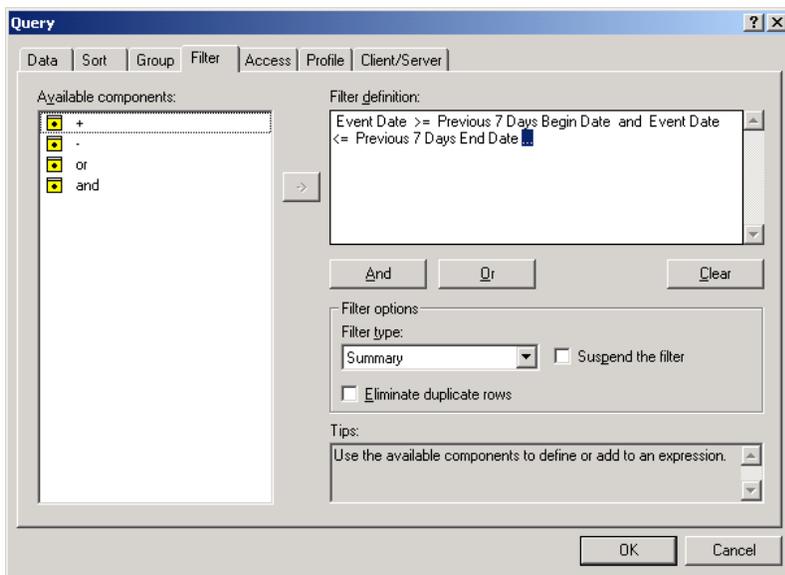
24. Select **AND**. Select **Report Columns** and double click on **Event Date**. **Double** Click on **<=**.



25. Repeat steps 21 through 23, except this time select **Previous 7 Days End Date**.



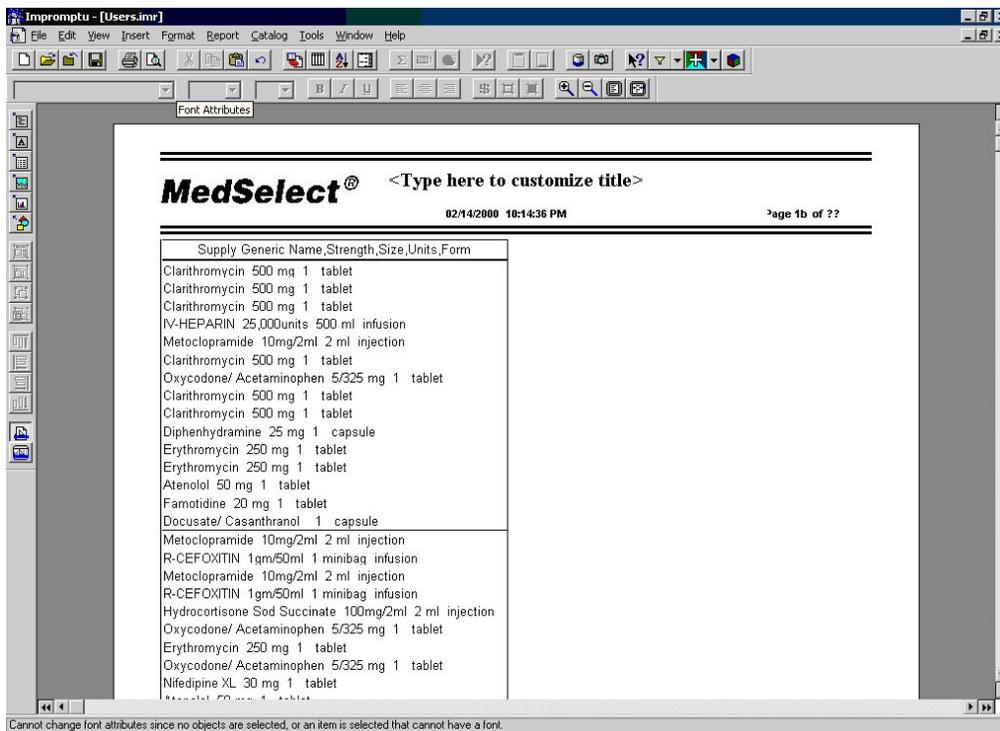
The finished filter expression should look like:



26. Select **OK** and run the query.

DT's Location Number	User Last, First	Profile Description	Event Date	Status Desc.	Quantity
100	LPN, Lucy	LPN	02/12/2000 12:16AM	Taken	-1
			02/12/2000 12:17AM	Taken	-1
			02/12/2000 12:18AM	Taken	-1
			02/12/2000 12:19AM	Taken	-1
			02/12/2000 12:20AM	Taken	-1
			02/13/2000 12:04AM	Taken	-1
			02/13/2000 12:05AM	Taken	-1
			02/13/2000 12:05AM	Taken	-1
			02/13/2000 12:06AM	Taken	-1
			02/13/2000 12:06AM	Taken	-2
			02/13/2000 08:11PM	Taken	-1
			02/13/2000 08:11PM	Taken	-1
			02/13/2000 08:11PM	Taken	-1
			02/13/2000 08:12PM	Taken	-1
			02/13/2000 08:12PM	Taken	-1
	LPN, Mary		02/12/2000 06:12AM	Taken	-1
			02/12/2000 06:12AM	Taken	-1
			02/12/2000 06:13AM	Patient Resolved Credit	1
			02/12/2000 06:14AM	Taken	-1
			02/12/2000 06:14AM	Taken	-1
			02/12/2000 06:15AM	Taken	-1
			02/12/2000 06:32AM	Taken	-1
			02/12/2000 08:41AM	Taken	-1
			02/12/2000 08:43AM	Taken	-1

The data elements contained in the report span more than one page and can be viewed by clicking on the **double right arrows** , or selecting **screen layout** .



(Second page of report, as viewed after double arrow selection)

DT's Location Number	User Last, First	Profile Description	Event Date	Status Desc.	Quantity	Supply Generic Name,Strength,Size,Units	
100	LPN, Lucy	LPN	02/12/2000 12:16AM	Taken	-1	Clarithromycin 500 mg 1 tablet	
			02/12/2000 12:17AM	Taken	-1	Clarithromycin 500 mg 1 tablet	
			02/12/2000 12:18AM	Taken	-1	Clarithromycin 500 mg 1 tablet	
			02/12/2000 12:19AM	Taken	-1	IV-HEPARIN 25,000units 500 ml infusion	
			02/12/2000 12:20AM	Taken	-1	Metoclopramide 10mg/2ml 2 ml injection	
			02/13/2000 12:04AM	Taken	-1	Clarithromycin 500 mg 1 tablet	
			02/13/2000 12:05AM	Taken	-1	Oxycodone/ Acetaminophen 5/325 mg 1 table	
			02/13/2000 12:05AM	Taken	-1	Clarithromycin 500 mg 1 tablet	
			02/13/2000 12:06AM	Taken	-1	Clarithromycin 500 mg 1 tablet	
			02/13/2000 12:06AM	Taken	-2	Diphenhydramine 25 mg 1 capsule	
	LPN, Mary	LPN	02/13/2000 08:11PM	Taken	-1	Erythromycin 250 mg 1 tablet	
			02/13/2000 08:11PM	Taken	-1	Erythromycin 250 mg 1 tablet	
			02/13/2000 08:11PM	Taken	-1	Atenolol 50 mg 1 tablet	
			02/13/2000 08:12PM	Taken	-1	Famotidine 20 mg 1 tablet	
			02/13/2000 08:12PM	Taken	-1	Docusate/ Casanthranol 1 capsule	
			02/12/2000 06:12AM	Taken	-1	Metoclopramide 10mg/2ml 2 ml injection	
			02/12/2000 06:12AM	Taken	-1	R-CEFOXITIN 1gm/50ml 1 minibag infusion	
			02/12/2000 06:13AM	Patient Resolved Credit			
			02/12/2000 06:14AM	Taken	-1	R-CEFOXITIN 1gm/50ml 1 minibag infusion	
			02/12/2000 06:14AM	Taken	-1	Hydrocortisone Sod Succinate 100mg/2ml 2 m	
02/12/2000 06:15AM	Taken	-1	Oxycodone/ Acetaminophen 5/325 mg 1 table				
02/12/2000 08:32AM	Taken	-1	Erythromycin 250 mg 1 tablet				
02/12/2000 08:41AM	Taken	-1	Oxycodone/ Acetaminophen 5/325 mg 1 table				
02/12/2000 08:43AM	Taken	-1	Nifedipine XL 30 mg 1 tablet				
02/12/2000 08:43AM	Taken	-1	Atenolol 50 mg 1 tablet				
02/12/2000 08:43AM	Taken	-1	Ferrous Sulfate 300 mg 1 tablet				
02/12/2000 08:46AM	Taken	-1	Docusate/ Casanthranol 1 capsule				
02/12/2000 08:48AM	Taken	-1	Famotidine 20 mg 1 tablet				
02/12/2000 08:48AM	Taken	-1	Prochlorperazine 10mg/2ml 10 mg injection				
02/12/2000 08:48AM	Taken	-1	Fluoxetine 20 mg 1 Capsule				
02/12/2000 09:34AM	Taken	-1	Alprazolam 0.25 mg 1 tablet				
02/12/2000 09:36AM	Taken	-1	Famotidine 20 mg 1 tablet				

(Screen Layout View)

This report is intended to give the Nurse Manager and/or Pharmacy a list of any User that accessed the Display Terminal for that location, therefore, most of the data does not need to be displayed, although should be retrievable if there is a specific question about what an individual User may have done at the DT. Therefore most information will be deleted from the report and accessed only when needed.

- To finish this report, select the columns to be deleted from the report. Holding down the **Ctrl** key select **Quantity, Supply Generic Name, Strength, Size, Units/Form, Event Date, and Status Desc.**

DT's Location Number	User Last, First	Profile Description	Event Date	Status Desc	Quantity	Supply Generic Name, Strength, Size, Units			
100	LPN, Lucy	LPN	02/12/2000 12:16AM	Taken	-1	Clarithromycin 500 mg 1 tablet			
			02/12/2000 12:17AM	Taken	-1	Clarithromycin 500 mg 1 tablet			
			02/12/2000 12:18AM	Taken	-1	Clarithromycin 500 mg 1 tablet			
			02/12/2000 12:19AM	Taken	-1	IV-HEPARIN 25,000units 500 ml infusion			
			02/12/2000 12:20AM	Taken	-1	Metoclopramide 10mg/2ml 2 ml injection			
			02/13/2000 12:04AM	Taken	-1	Clarithromycin 500 mg 1 tablet			
			02/13/2000 12:05AM	Taken	-1	Oxycodone/ Acetaminophen 5/325 mg 1 tabl			
			02/13/2000 12:05AM	Taken	-1	Clarithromycin 500 mg 1 tablet			
			02/13/2000 12:06AM	Taken	-1	Clarithromycin 500 mg 1 tablet			
			02/13/2000 12:06AM	Taken	-2	Diphenhydramine 25 mg 1 capsule			
			02/13/2000 08:11PM	Taken	-1	Erythromycin 250 mg 1 tablet			
			02/13/2000 08:11PM	Taken	-1	Erythromycin 250 mg 1 tablet			
			02/13/2000 08:11PM	Taken	-1	Atenolol 50 mg 1 tablet			
			02/13/2000 08:12PM	Taken	-1	Famotidine 20 mg 1 tablet			
			02/13/2000 08:12PM	Taken	-1	Docusate/ Casanthranol 1 capsule			
			100	LPN, Mary	LPN	02/12/2000 06:12AM	Taken	-1	Metoclopramide 10mg/2ml 2 ml injection
						02/12/2000 06:12AM	Taken	-1	R-CEFOXITIN 1grm/50ml 1 minibag infusion
						02/12/2000 06:13AM	Patient Resolved Credit	1	Metoclopramide 10mg/2ml 2 ml injection
02/12/2000 06:14AM	Taken	-1				R-CEFOXITIN 1grm/50ml 1 minibag infusion			
02/12/2000 06:14AM	Taken	-1				Hydrocortisone Sod Succinate 100mg/2ml 2 ml injection			
02/12/2000 06:15AM	Taken	-1				Oxycodone/ Acetaminophen 5/325 mg 1 tabl			
02/12/2000 08:32AM	Taken	-1				Erythromycin 250 mg 1 tablet			
02/12/2000 08:41AM	Taken	-1				Oxycodone/ Acetaminophen 5/325 mg 1 tabl			
02/12/2000 08:43AM	Taken	-1				Nifedipine XL 30 mg 1 tablet			
02/12/2000 08:43AM	Taken	-1				Atenolol 50 mg 1 tablet			

28. Use the **Delete Key** to eliminate the columns.

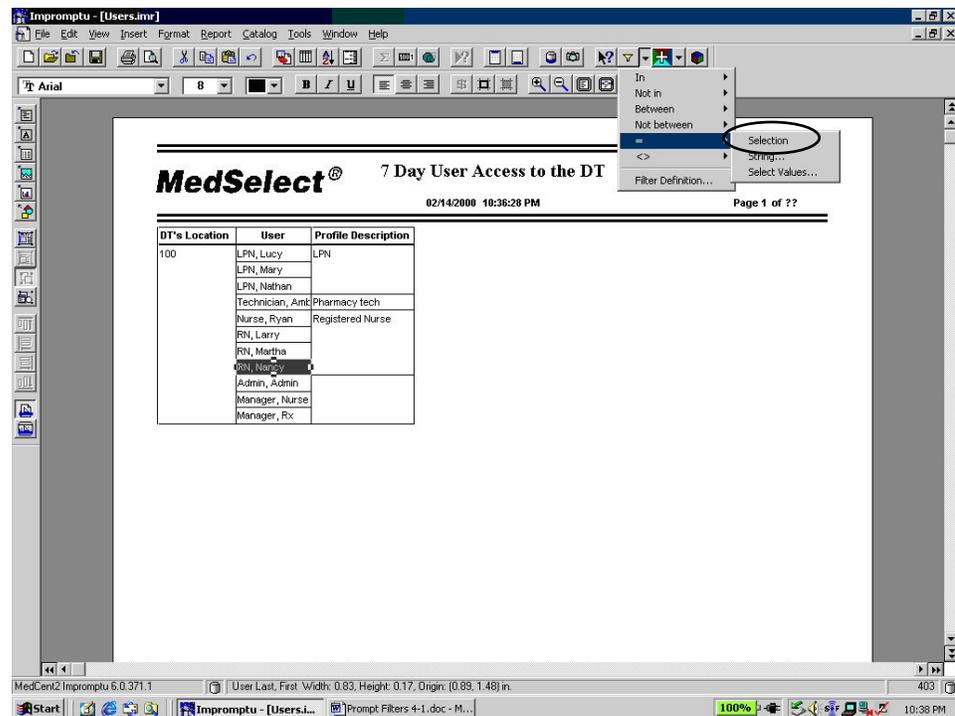
DT's Location	User	Profile Description
100	LPN, Lucy	LPN
	LPN, Mary	
	LPN, Nathan	
	Technician, Amk	Pharmacy tech
	Nurse, Ryan	Registered Nurse
	RN, Larry	
	RN, Martha	
	RN, Nancy	
	Admin, Admin	
	Manager, Nurse	
	Manager, Rx	

This report now reflects all users that have accessed this location in the previous 7 days.

29. Save this Report as **7-Day User Access to the DT**.

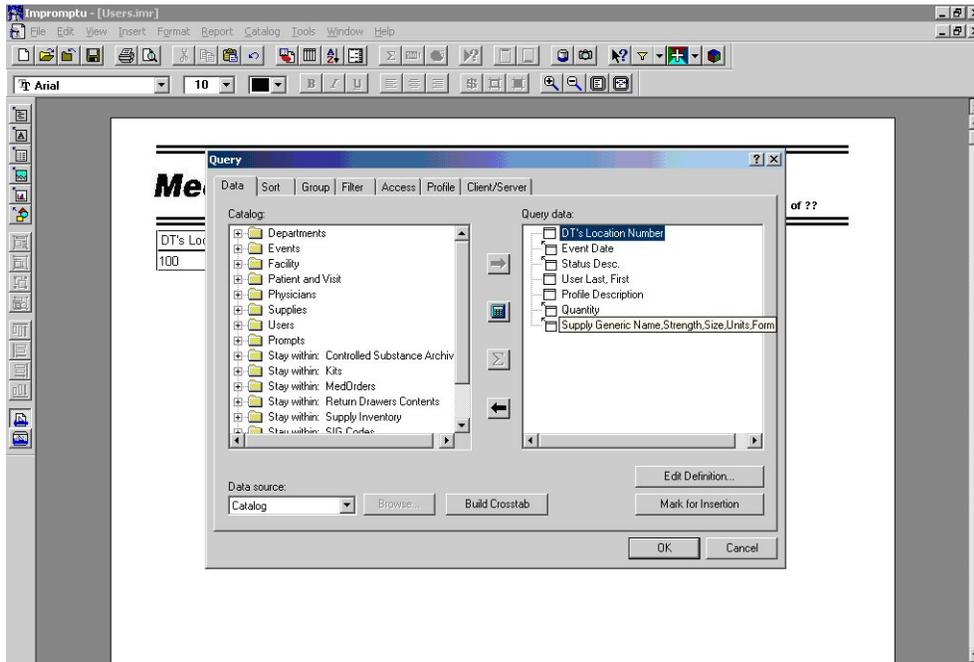
If specific information is needed on dispensing for any user, the information can be easily added back into the report.

30. Select the **User** in question.



31. Filter, using the filter icon in the Toolbar. Select = and **Selection**.

32. To add date events back into the Report. From the **Query Dialog** box double click on **Event Date, Status Desc, Quantity, and Supply Generic Name, Strength, Size, Units, Form**. This marks them for insertion into the report.
33. Click **OK**.



34. The resulting report displays all dispenses for Nurse Nancy for the 7-day period.

MedSelect® 7 Day User Access to the DT						
				02/14/2000 10:34:21 PM	Page 1 of 27	
DT's Location	User	Profile Description	Event Date	Qty	Status Desc.	Generic Name, Strength
100	RN, Nancy	Registered Nurse	02/11/2000 02:30PM	1	Taken	Alprazolam 0.25 mg 1 tablet
			02/11/2000 02:31PM	0.25	Wasted	Alprazolam 0.25 mg 1 tablet
			02/11/2000 02:31PM	0.75	Wasted	Alprazolam 0.25 mg 1 tablet
			02/11/2000 02:32PM	1	Taken	Alprazolam 0.25 mg 1 tablet
			02/12/2000 03:39PM	1	Taken	Alprazolam 0.25 mg 1 tablet
			02/13/2000 02:17PM	1	Taken	Alprazolam 0.25 mg 1 tablet
			02/13/2000 02:17PM	1	Patient Resolved Credit	Alprazolam 0.25 mg 1 tablet
			02/11/2000 02:09PM	1	Taken	Clarithromycin 500 mg 1 tablet
			02/11/2000 03:20PM	1	Taken	Cocaine hydrochloride 4% 4 ml topic
			02/11/2000 03:20PM	2	Taken	Dexamethasone 4mg/1ml 1 ml injectio
			02/11/2000 02:06PM	1	Taken	Erythromycin 250 mg 1 tablet
			02/11/2000 02:10PM	1	Taken	Erythromycin 250 mg 1 tablet
			02/11/2000 03:39PM	1	Taken	Erythromycin 250 mg 1 tablet
			02/11/2000 03:39PM	1	Taken	Erythromycin 250 mg 1 tablet
			02/11/2000 03:39PM	1	Taken	Erythromycin 250 mg 1 tablet
			02/11/2000 03:40PM	1	Taken	Erythromycin 250 mg 1 tablet
			02/11/2000 03:41PM	1	Taken	Erythromycin 250 mg 1 tablet
			02/12/2000 03:44PM	1	Taken	Erythromycin 250 mg 1 tablet
			02/12/2000 03:45PM	1	Taken	Erythromycin 250 mg 1 tablet
			02/12/2000 03:46PM	1	Taken	Erythromycin 250 mg 1 tablet
			02/12/2000 03:47PM	1	Taken	Erythromycin 250 mg 1 tablet
			02/12/2000 04:06PM	1	Taken	Erythromycin 250 mg 1 tablet
			02/12/2000 04:09PM	1	Taken	Erythromycin 250 mg 1 tablet
02/12/2000 04:43PM	1	Taken	Erythromycin 250 mg 1 tablet			
02/13/2000 12:25PM	1	Taken	Erythromycin 250 mg 1 tablet			
02/13/2000 12:26PM	1	Taken	Erythromycin 250 mg 1 tablet			
02/13/2000 12:27PM	1	Taken	Erythromycin 250 mg 1 tablet			

35. Once the information needed is found, the report should be closed **WITHOUT** saving, so that it reverts back to the original **7-Day Report**.

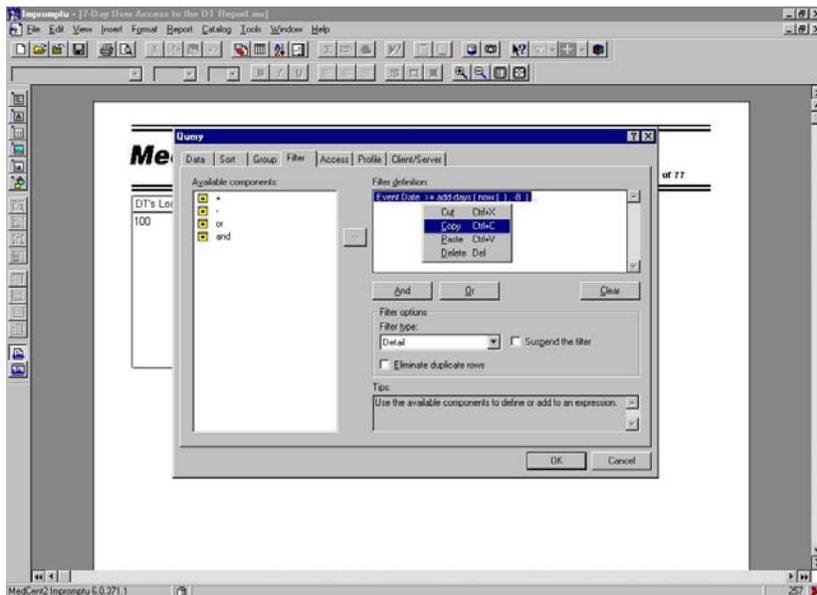
MedSelect® 7 Day User Access to the DT		
		02/14/2000 10:36:28 PM
		Page 1 of ??
DT's Location	User	Profile Description
100	LPN, Lucy	LPN
	LPN, Mary	
	LPN, Nathan	
	Technician, Am	Pharmacy tech
	Nurse, Ryan	Registered Nurse
	RN, Larry	
	RN, Martha	
	RN, Nancy	
	Admin, Admin	
	Manager, Nurse	
	Manager, Rx	

## Section 4

### Demo 2: Copying a Filter Expression from one report into a new report

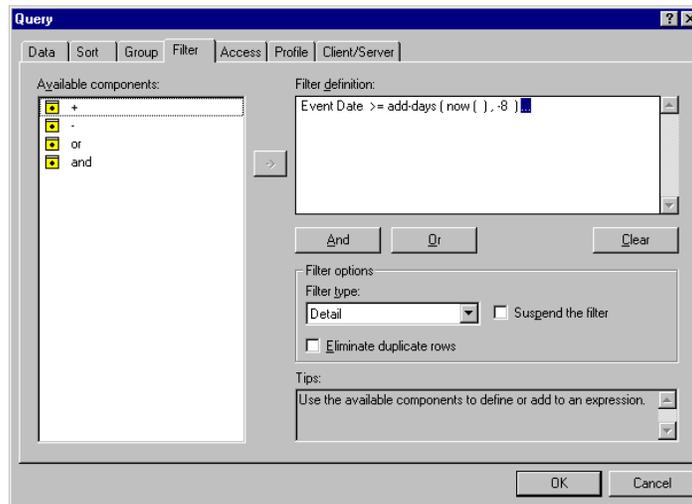
**Objective:** Write a custom report with a 7-Day Filter expression, using a previously written report.

1. Open the **7-Day User Access to the DT Report**.
2. From Examiner Select **New**. Select the **MedSelect Landscape**, here you will build a date prompt from a previous written prompt. Click on **OK** twice.
3. From the Menu Bar click on the **Window** option, select the **7-day User Access to the DT.imr** and open the **Query Dialog** box and **Filter** tab.
4. Highlight the filter expression in the Detail filter. **Right click** and **copy**.

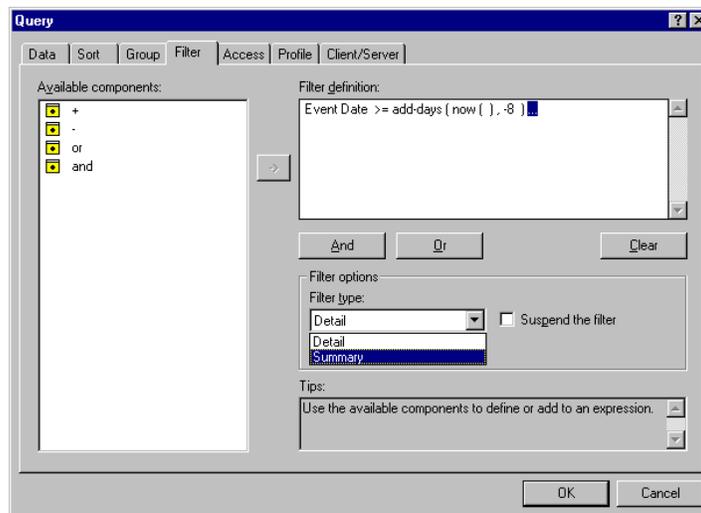


5. Click on **Cancel**, twice. Return (via **Window** option) to the new report.
6. Open the **Query Dialog** box and filter expression. **Right click** and **paste** the expression in the box.

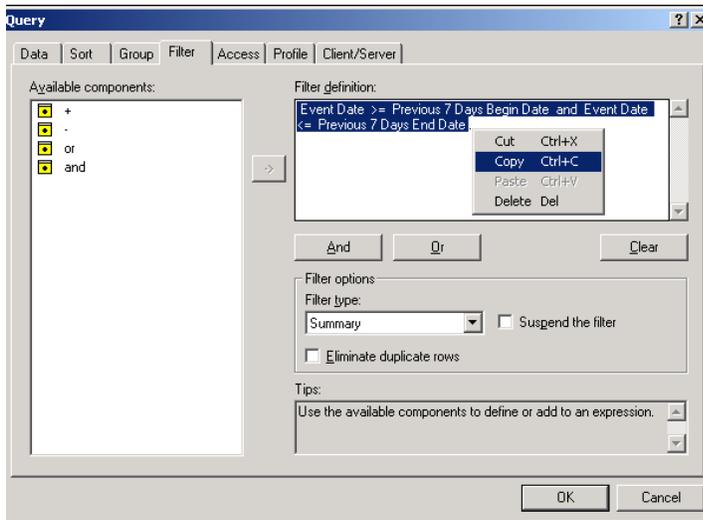
7. Click **OK** twice.



8. Return to the **7-Day User Access to the DT.imr** report and open Query Dialog box, Filter tab and select the **Summary Filter type** from the **Filter Type Box**.

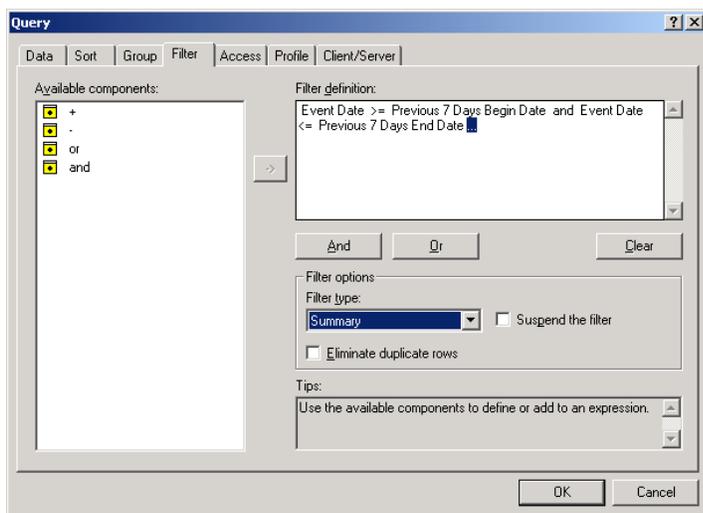


9. Highlight the expression, **Right click** and copy the filter expression.



10. Cancel twice and return to the new report. Open the **Query Dialog** box, filter expression box and **Summary Filter**.

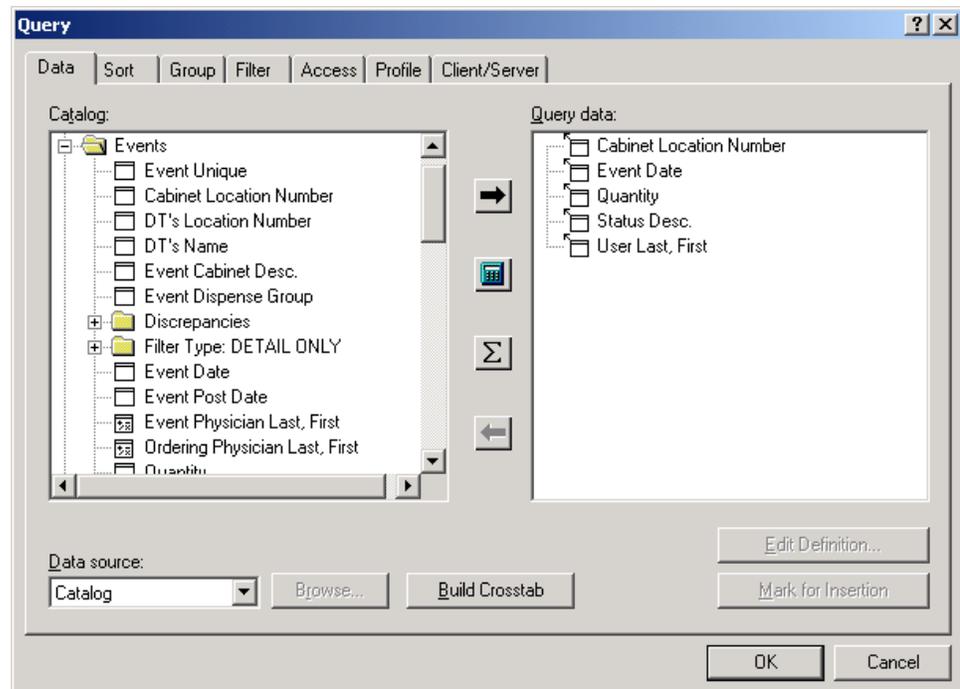
11. Right click and Paste the expression in the box.



**Now let's get our Data**

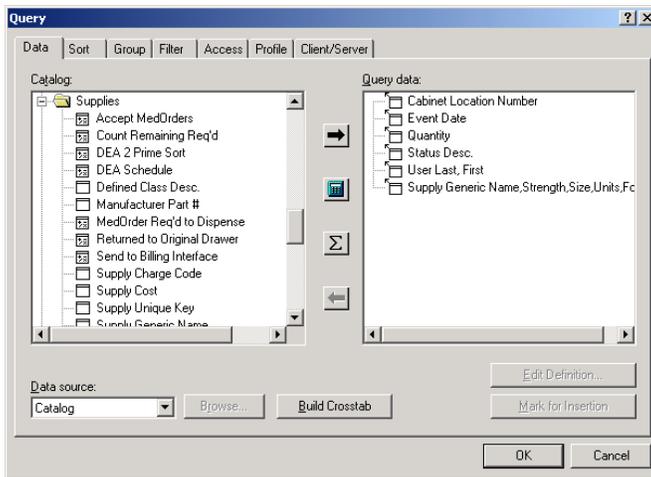
12. From the **Query Data dialog** box select the **Events** folder, and the following data elements:

- Cabinet Location Number
- Event Date
- Quantity
- Status Desc
- User Last, First

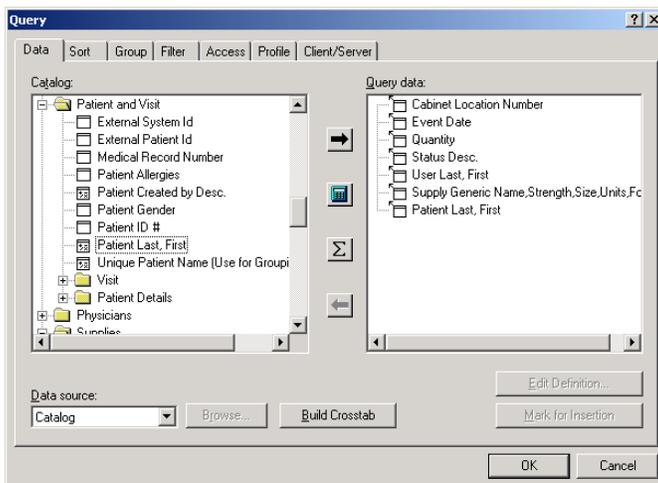


13. From the **Supplies** folder add:

- Supply Generic Name, Strength, Size, Units, Form

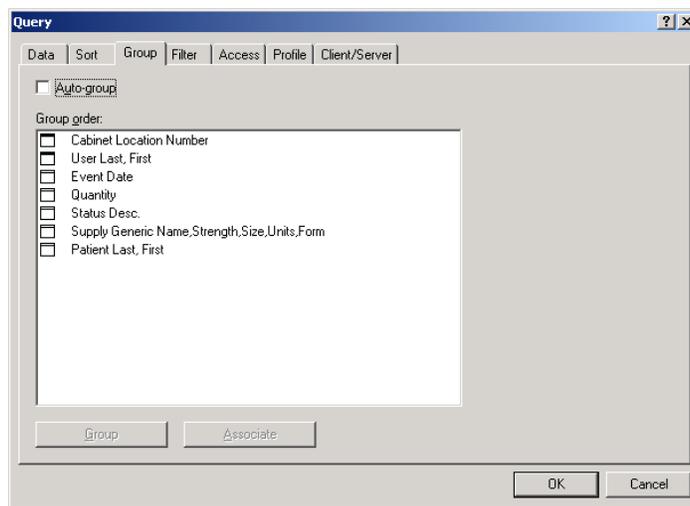


14. From the **Patient and Visit** folder add the **Patient Last, First**.

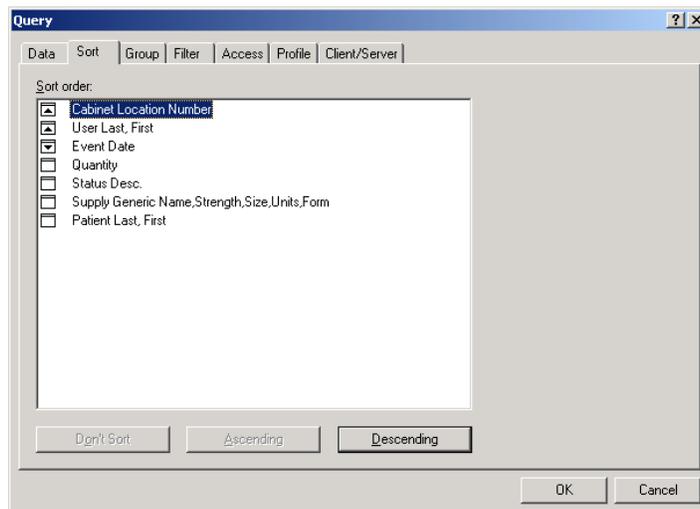


15. Next, select the **Group** tab. Group the following:

- Cabinet Location Number
- User Last, First

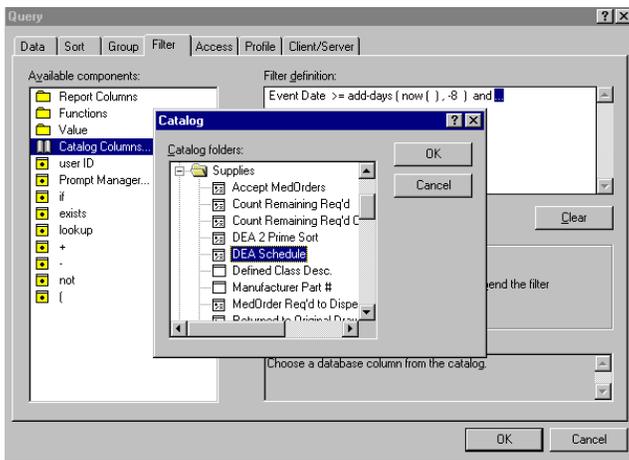


16. Select the **Sort** tab. Notice that **Cabinet Location Number** and **User Last, First** are already sorted. Select **Event Date** and **Sort Descending**. Click **OK**.

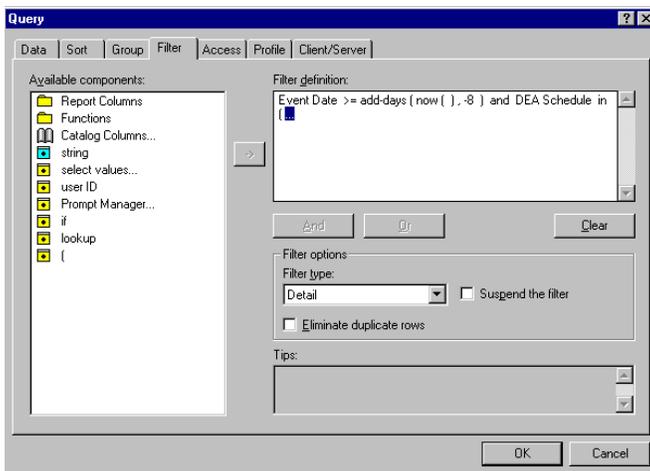


Finally let's filter the report to only reflect controlled substances, and clean up the display. Since we are not printing the DEA Schedule on the Report, we will build the query from the **Catalog Columns**.

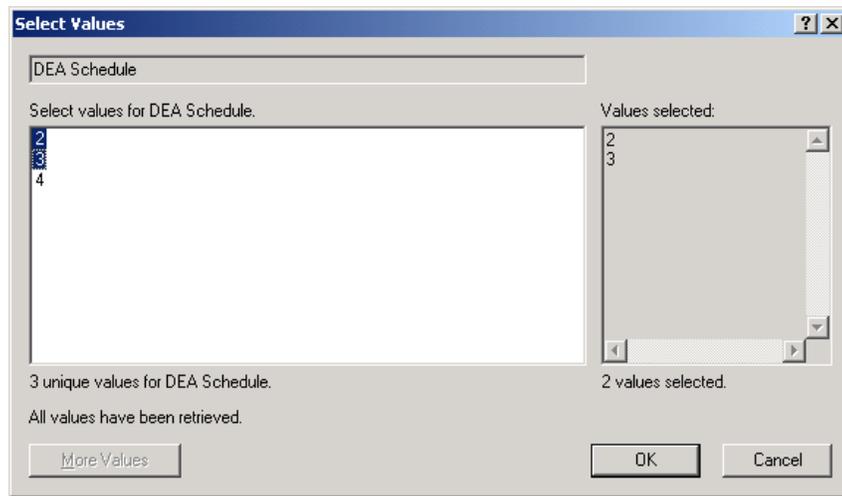
17. Open the **Query dialog** box, click on the **Filter** tab.
18. Click **And**, open the **Catalog Columns**, then **Supplies** folder, and double click on **DEA Schedule**



19. Select the **IN** operator and **open** parentheses ( . Next choose **Select Values...**



- When the **Select Values** window opens, select **Schedule 2 and 3**, by holding down the **Ctrl** button and selecting both values.



- Choose **OK**.
- Select the **closed parenthesis )** to finish the expression. Click **OK** to run the query.

**MedSelect®** <Type here to customize title>

02/15/2000 12:05:40 AM Page 1 of

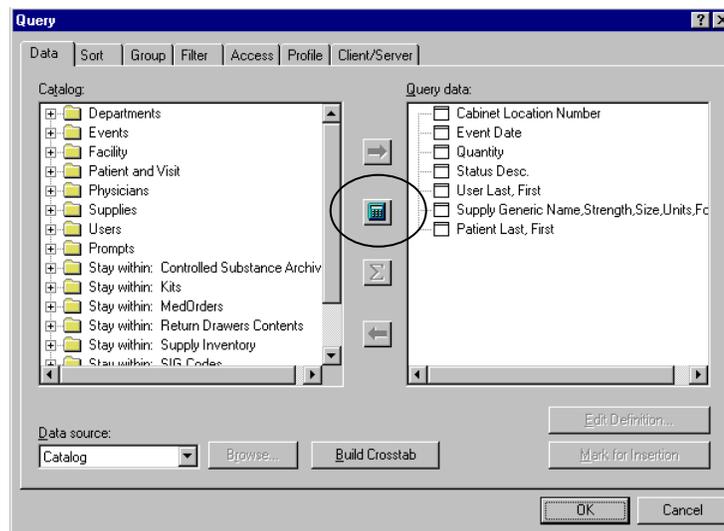
Cabinet Location Number	Event Date	Quantity	Status Desc.	User Last, First	Supply Generic Name,Strength,Size,Units,Form
100	02/13/2000 12:05AM	-1	Taken	LPN, Lucy	Oxycodone/ Acetaminophen 5/325 mg 1 tablet
	02/13/2000 06:23AM	-1	Taken	LPN, Mary	Oxycodone/ Acetaminophen 5/325 mg 1 tablet
	02/12/2000 03:24PM	-1	Taken		Oxycodone/ Acetaminophen 5/325 mg 1 tablet
	02/12/2000 12:06PM	-1	Taken		Oxycodone/ Acetaminophen 5/325 mg 1 tablet
	02/12/2000 09:40AM	-1	Taken		Oxycodone/ Acetaminophen 5/325 mg 1 tablet
	02/12/2000 08:41AM	-1	Taken		Oxycodone/ Acetaminophen 5/325 mg 1 tablet
	02/12/2000 06:15AM	-1	Taken		Oxycodone/ Acetaminophen 5/325 mg 1 tablet
	02/14/2000 08:24PM	-1	Taken	LPN, Nathan	Meperidine 50 mg 1 ml injection
	02/14/2000 08:24PM	3	Dept Resolved Credit		Meperidine 50 mg 1 ml injection
	02/14/2000 08:24PM	-2	Taken		Oxycodone/ Acetaminophen 5/325 mg 1 tablet
	02/13/2000 12:19PM	-1	Taken		Oxycodone/ Acetaminophen 5/325 mg 1 tablet
	02/14/2000 08:28PM	-2	Taken	Manager, Nurse	Oxycodone/ Acetaminophen 5/325 mg 1 tablet
	02/14/2000 08:28PM	-2	Taken		Oxycodone/ Acetaminophen 5/325 mg 1 tablet
	02/13/2000 08:13PM	-1	Taken		Meperidine 50 mg 1 ml injection
	02/11/2000 03:30PM	-1	Taken	Manager, Rx	Cocaine hydrochloride 4% 4 ml topical solution
	02/14/2000 12:04PM	-1	Taken	Nurse, Ryan	Meperidine 50 mg 1 ml injection
	02/14/2000 12:04PM	-6	Dept Resolved Charge		Meperidine 50 mg 1 ml injection
	02/14/2000 12:03PM	-1	Taken		Oxycodone/ Acetaminophen 5/325 mg 1 tablet
	02/14/2000 12:01PM	-1	Taken		Oxycodone/ Acetaminophen 5/325 mg 1 tablet
	02/12/2000 08:56PM	-1	Taken		Thiopental sodium 25mg/ml 500 mg kit injection
	02/13/2000 08:16PM	-1	Taken	RN, Larry	Oxycodone/ Acetaminophen 5/325 mg 1 tablet
	02/13/2000 12:11AM	-1	Taken		Meperidine 50 mg 1 ml injection
	02/13/2000 12:11AM	-2	Dept Resolved Charge		Meperidine 50 mg 1 ml injection

To finish this report, let's move the **User** column next to the **Cabinet Location Number** and make all quantities positive numbers.

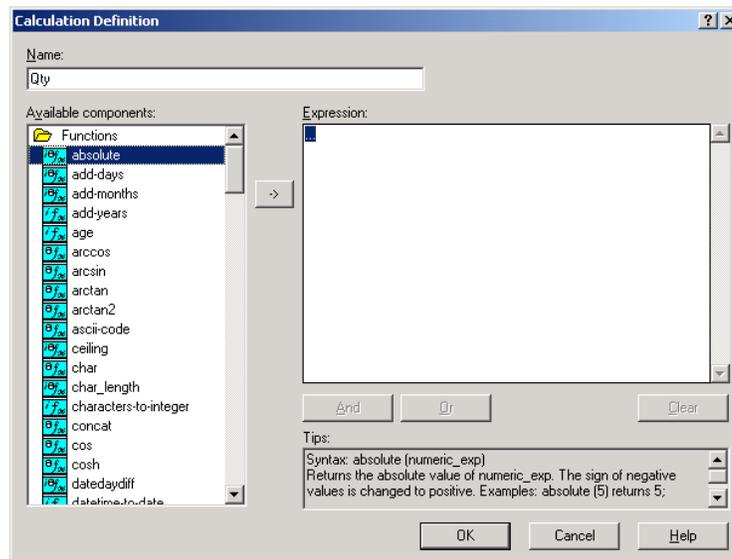
23. Select any data element or header in the **User** column and drag the column to the left until it is between the **Cabinet Location Number** and **Event Date**.

<b>MedSelect</b> <sup>®</sup>		<Type here to customize title>			
		02/15/2000 12:05:40 AM		Page 1 of ??	
Cabinet Location Number	User Last, First	Event Date	Quantity	Status Desc.	Supply Generic Name,Strength,Size,Units,Form
100	LPN, Lucy	02/13/2000 12:05AM	-1	Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet
	LPN, Mary	02/13/2000 06:23AM	-1	Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet
		02/12/2000 03:24PM	-1	Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet
		02/12/2000 12:06PM	-1	Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet
		02/12/2000 09:40AM	-1	Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet
		02/12/2000 08:41AM	-1	Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet
		02/12/2000 06:15AM	-1	Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet
	LPN, Nathan	02/14/2000 08:24PM	-1	Taken	Meperidine 50 mg 1 ml injection
		02/14/2000 08:24PM	3	Dept Resolved Credit	Meperidine 50 mg 1 ml injection
		02/14/2000 08:24PM	-2	Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet
		02/13/2000 12:19PM	-1	Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet
	Manager, Nurse	02/14/2000 08:28PM	-2	Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet
		02/14/2000 08:28PM	-2	Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet
		02/13/2000 08:13PM	-1	Taken	Meperidine 50 mg 1 ml injection
	Manager, Rx	02/11/2000 03:30PM	-1	Taken	Cocaine hydrochloride 4% 4 ml topical solution
	Nurse, Ryan	02/14/2000 12:04PM	-1	Taken	Meperidine 50 mg 1 ml injection
		02/14/2000 12:04PM	-6	Dept Resolved Charge	Meperidine 50 mg 1 ml injection
		02/14/2000 12:03PM	-1	Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet
		02/14/2000 12:01PM	-1	Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet
		02/12/2000 08:56PM	-1	Taken	Thiopental sodium 25mg/ml 500 mg kit injection
	RN, Larry	02/13/2000 08:16PM	-1	Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet
		02/13/2000 12:11AM	-1	Taken	Meperidine 50 mg 1 ml injection
		02/13/2000 12:11AM	-2	Dept Resolved Charge	Meperidine 50 mg 1 ml injection
		02/13/2000 12:10AM	-1	Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet

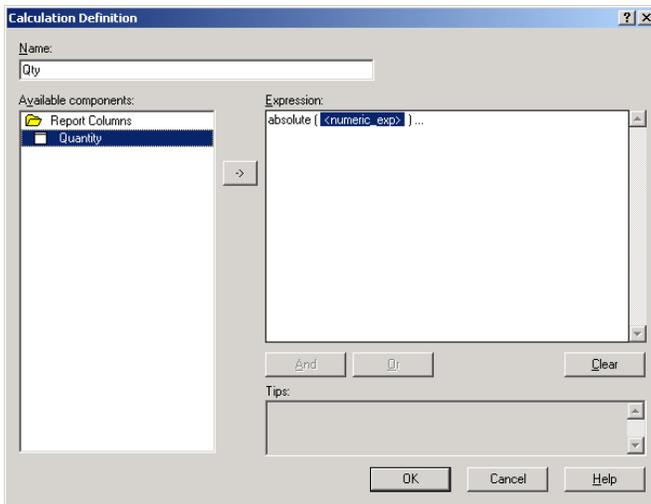
24. To make all quantities positive numbers it is necessary to do a calculation involving the quantity column. Open the **Query Dialog** box and click on the **Calculator**.



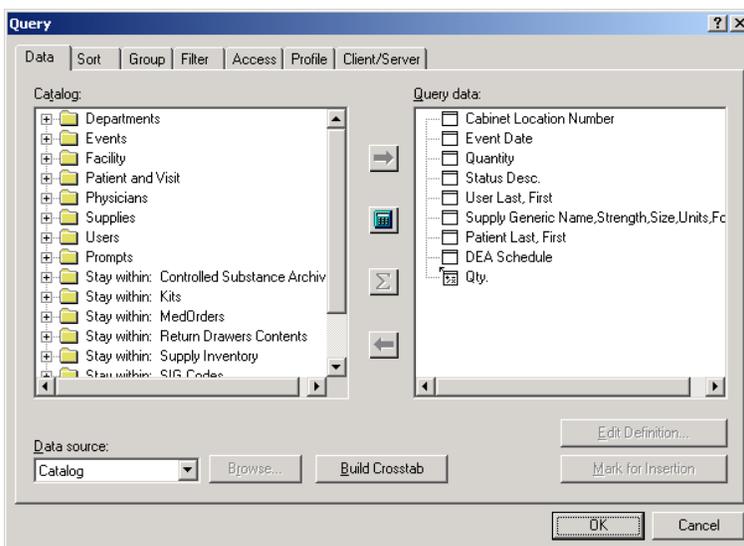
25. The **Calculation Definition** box opens. Define the Calculation. In this case let's call it **Qty**.
26. Double click on **Functions** and then double click on **Absolute**.



27. From **Report Columns**, select **Quantity** and double click, putting it into the **calculation expression box**.



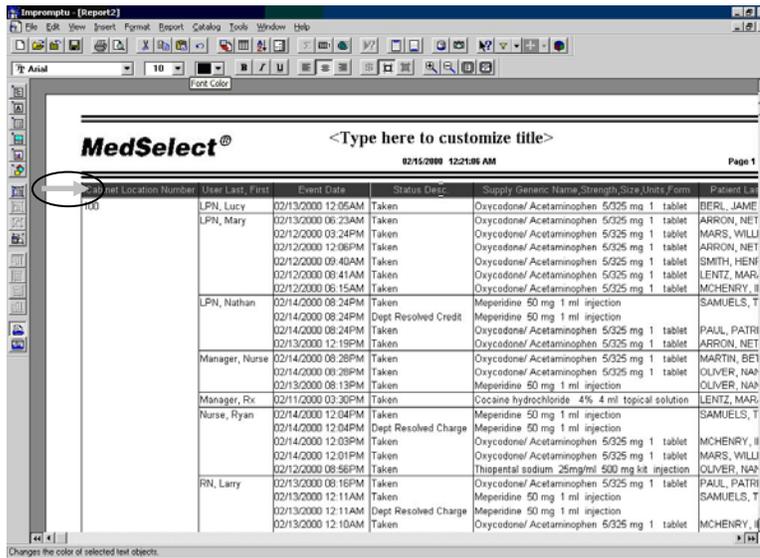
28. Click **OK**. **Qty** is now a data element in the **Query data** box.



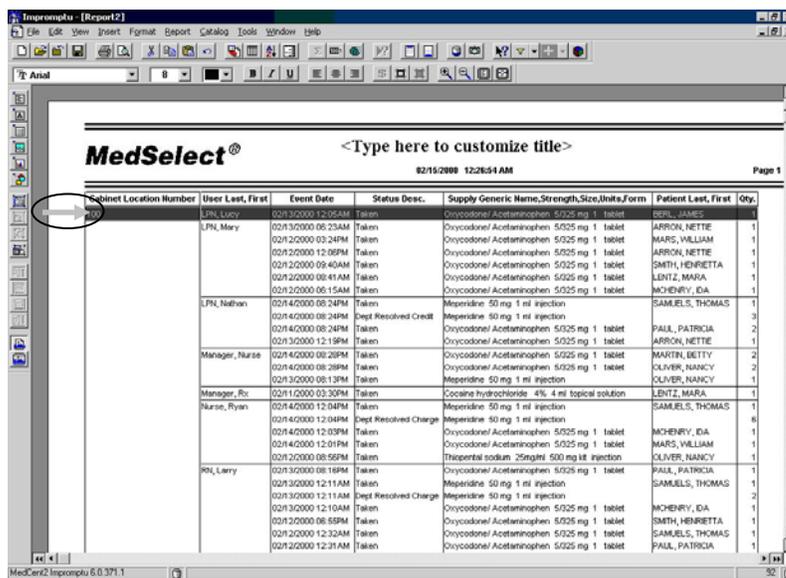
29. Click **OK**.



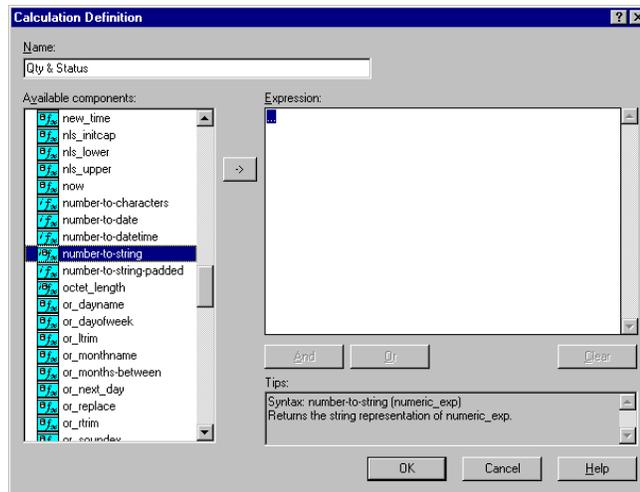
31. Point the cursor at the entire header row. Change the Font size to **8** and **Bold** the headers.



32. Highlight the data element row and change it to Font size **8**.

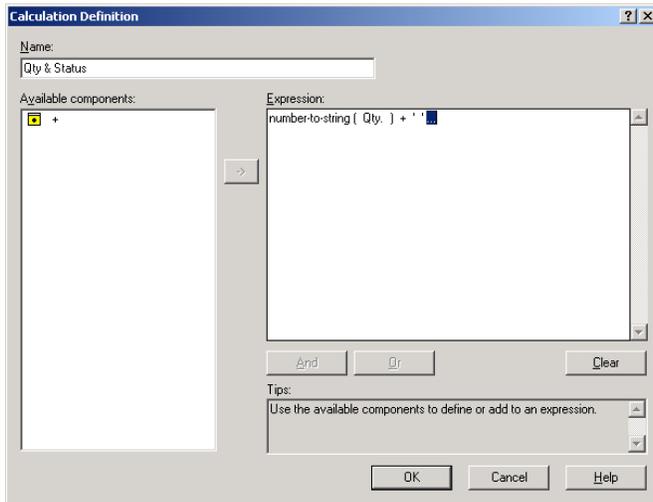


33. Next let's clean up the display of the **Qty** and **Status**. Open the **Query Dialog** box and select the **calculator** again. In the **Calculation Definition** box title the calculation **Qty & Status**.
34. Open the **Function** folder and select **Number -to-String**.

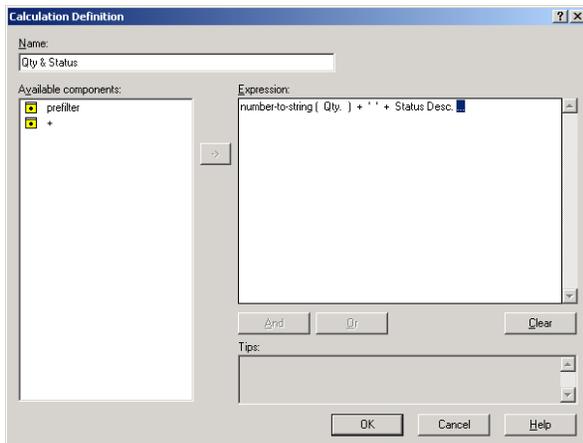


35. From **Report Columns** add **Qty** (this is the previously calculated positive quantity).

36. Select the **+**, followed by **string**. Type two spaces in the string expression, hit **Enter**.



37. Select **+**. Finally, from **Report Column** add the **Status Desc**.



38. Select **OK**. The newly created data element will appear in the **Query Data** box of the **Query Dialog** box. Choose **OK** again and the Qty & Status will appear in the report in the far left column, extending over to the next page. Select the separate values **Qty** and **Status Desc**. data elements and **Delete**.

Once deleted, the new data element will appear on the report proper.

39. Change the Font size to **8** and **Bold** the header

<b>MedSelect®</b>		<Type here to customize title>				
		02/18/2000 12:52:02 PM			Page 1 of ??	
Cabinet Location Number	User Last, First	Event Date	Supply Generic Name,Strength,Size,Units,Form	Patient Last, First	Qty & Status	
100	LPN, Lucy	02/13/2000 12:05AM	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	BERL, JAMES	1 Taken	
		02/13/2000 06:23AM	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	ARRON, NETTIE	1 Taken	
		02/12/2000 03:24PM	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	MARS, WILLIAM	1 Taken	
		02/12/2000 12:06PM	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	ARRON, NETTIE	1 Taken	
		02/12/2000 09:40AM	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	SMITH, HENRIETTA	1 Taken	
		02/12/2000 08:41AM	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	LENTZ, MARA	1 Taken	
	LPN, Nathan	02/12/2000 06:15AM	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	MCHENRY, IDA	1 Taken	
		02/14/2000 08:24PM	Meperidine 50 mg 1 ml injection	SAMUELS, THOMAS	1 Taken	
	Manager, Nurse	02/14/2000 08:24PM	Meperidine 50 mg 1 ml injection	PAUL, PATRICIA	3 Dept Resolved Credit	
		02/13/2000 12:19PM	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	ARRON, NETTIE	1 Taken	
		02/14/2000 08:28PM	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	MARTIN, BETTY	2 Taken	
	Manager, Rx	02/14/2000 08:28PM	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	OLIVER, NANCY	2 Taken	
		02/13/2000 08:13PM	Meperidine 50 mg 1 ml injection	OLIVER, NANCY	1 Taken	
	Nurse, Ryan	02/11/2000 03:30PM	Cocaine hydrochloride 4% 4 ml topical solution	LENTZ, MARA	1 Taken	
		02/14/2000 12:04PM	Meperidine 50 mg 1 ml injection	SAMUELS, THOMAS	1 Taken	
02/14/2000 12:04PM		Meperidine 50 mg 1 ml injection		6 Dept Resolved Charge		
02/14/2000 12:03PM		Oxycodone/ Acetaminophen 5/325 mg 1 tablet	MCHENRY, IDA	1 Taken		
RN, Larry	02/14/2000 12:01PM	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	MARS, WILLIAM	1 Taken		
	02/12/2000 08:56PM	Thiopental sodium 25mg/ml 500 mg kit injection	OLIVER, NANCY	1 Taken		
	02/13/2000 08:16PM	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	PAUL, PATRICIA	1 Taken		
	02/13/2000 12:11AM	Meperidine 50 mg 1 ml injection	SAMUELS, THOMAS	1 Taken		
	02/13/2000 12:11AM	Meperidine 50 mg 1 ml injection		2 Dept Resolved Charge		
	02/13/2000 12:10AM	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	MCHENRY, IDA	1 Taken		
	02/12/2000 06:55PM	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	SMITH, HENRIETTA	1 Taken		
	02/12/2000 12:32AM	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	SAMUELS, THOMAS	1 Taken		
	02/12/2000 12:31AM	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	PAUL, PATRICIA	1 Taken		

40. Select the **Qty & Status** column and drag it over between **Event Date** and **Supply Generic**.

<b>MedSelect®</b>		<Type here to customize title>				
		02/14/2000 10:32:43 AM			Page 1 of ??	
Cabinet Location Number	User Last, First	Event Date	Qty & Status	Supply Generic Name,Strength,Size,Units,Form	Patient Last, First	
100	LPN, Lucy	02/13/2000 12:05AM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	BERL, JAMES	
		02/13/2000 06:23AM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	ARRON, NETTIE	
		02/12/2000 03:24PM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	MARS, WILLIAM	
		02/12/2000 12:06PM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	ARRON, NETTIE	
		02/12/2000 09:40AM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	SMITH, HENRIETTA	
		02/12/2000 08:41AM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	LENTZ, MARA	
	LPN, Nathan	02/12/2000 06:15AM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	MCHENRY, IDA	
		02/13/2000 12:19PM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	ARRON, NETTIE	
	Manager, Nurse	02/13/2000 08:13PM	1 Taken	Meperidine 50 mg 1 ml injection	OLIVER, NANCY	
	Manager, Rx	02/11/2000 03:30PM	1 Taken	Cocaine hydrochloride 4% 4 ml topical solution	LENTZ, MARA	
	Nurse, Ryan	02/13/2000 08:56PM	1 Taken	Thiopental sodium 25mg/ml 500 mg kit injection	OLIVER, NANCY	
	RN, Larry	02/13/2000 08:16PM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	PAUL, PATRICIA	
		02/13/2000 12:11AM	1 Taken	Meperidine 50 mg 1 ml injection	SAMUELS, THOMAS	
		02/13/2000 12:11AM	2 Dept Resolved Charge	Meperidine 50 mg 1 ml injection		
		02/13/2000 12:10AM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	MCHENRY, IDA	
02/12/2000 06:55PM		1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	SMITH, HENRIETTA		
02/12/2000 12:32AM		1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	SAMUELS, THOMAS		
	02/12/2000 12:31AM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	PAUL, PATRICIA		
	02/12/2000 12:31AM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	PAUL, PATRICIA		
	02/12/2000 12:21AM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	MARTIN, BETTY		
	02/11/2000 02:33PM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	MCHENRY, IDA		
	RN, Martha	02/13/2000 08:11AM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	MARTIN, BETTY	
		02/12/2000 08:17AM	1 Patient Resolved Credit	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	BERL, JAMES	
02/12/2000 08:17AM		1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	BERL, JAMES		
02/12/2000 06:18AM		1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	CASLAN, HENRIETA		
	02/11/2000 04:00PM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	MARTIN, BETTY		
	02/11/2000 03:55PM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	MARTIN, BETTY		
	RN, Nancy	02/13/2000 06:15PM	1 Dept Resolved Credit	Meperidine 50 mg 1 ml injection		
02/13/2000 06:15PM		1 Taken	Meperidine 50 mg 1 ml injection	SAMUELS, THOMAS		

41. Finally, name the report **7 Day Controlled Substance Report by User** and **save it, and Close.**

<b>MedSelect®</b>		<b>7 Day Controlled Substance Report by User</b>			Page 1 of ??	
02/18/2000 12:55:02 PM						
Cabinet Location Number	User Last, First	Event Date	Qty & Status	Supply Generic Name,Strength,Size,Units,Form	Patient Last, First	
100	LPN, Lucy	02/13/2000 12:05AM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	BERL, JAMES	
	LPN, Mary	02/13/2000 06:23AM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	ARRON, NETTIE	
		02/12/2000 03:24PM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	MARS, WILLIAM	
		02/12/2000 12:06PM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	ARRON, NETTIE	
		02/12/2000 09:40AM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	SMITH, HENRIETTA	
		02/12/2000 08:41AM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	LENTZ, MARA	
		02/12/2000 06:15AM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	MCHENRY, IDA	
	LPN, Nathan	02/14/2000 08:24PM	1 Taken	Meperidine 50 mg 1 ml injection	SAMUELS, THOMAS	
		02/14/2000 08:24PM	3 Dept Resolved Credit	Meperidine 50 mg 1 ml injection		
		02/14/2000 08:24PM	2 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	PAUL, PATRICIA	
	Manager, Nurse	02/13/2000 12:19PM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	ARRON, NETTIE	
		02/14/2000 08:26PM	2 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	MARTIN, BETTY	
	Manager, Rx	02/14/2000 08:26PM	2 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	OLIVER, NANCY	
		02/13/2000 08:13PM	1 Taken	Meperidine 50 mg 1 ml injection	OLIVER, NANCY	
	Manager, Rx	02/11/2000 03:30PM	1 Taken	Cocaine hydrochloride 4% 4 ml topical solution	LENTZ, MARA	
	Nurse, Ryan	02/14/2000 12:04PM	1 Taken	Meperidine 50 mg 1 ml injection	SAMUELS, THOMAS	
		02/14/2000 12:04PM	6 Dept Resolved Charge	Meperidine 50 mg 1 ml injection		
		02/14/2000 12:03PM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	MCHENRY, IDA	
		02/14/2000 12:01PM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	MARS, WILLIAM	
		02/12/2000 08:56PM	1 Taken	Thiopental sodium 25mg/ml 500 mg kit injection	OLIVER, NANCY	
RN, Larry	02/13/2000 08:16PM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	PAUL, PATRICIA		
	02/13/2000 12:11AM	1 Taken	Meperidine 50 mg 1 ml injection	SAMUELS, THOMAS		
	02/13/2000 12:11AM	2 Dept Resolved Charge	Meperidine 50 mg 1 ml injection			
	02/13/2000 12:10AM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	MCHENRY, IDA		
	02/12/2000 06:55PM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	SMITH, HENRIETTA		
	02/12/2000 12:32AM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	SAMUELS, THOMAS		
	02/12/2000 12:31AM	1 Taken	Oxycodone/ Acetaminophen 5/325 mg 1 tablet	PAUL, PATRICIA		



## Section 4

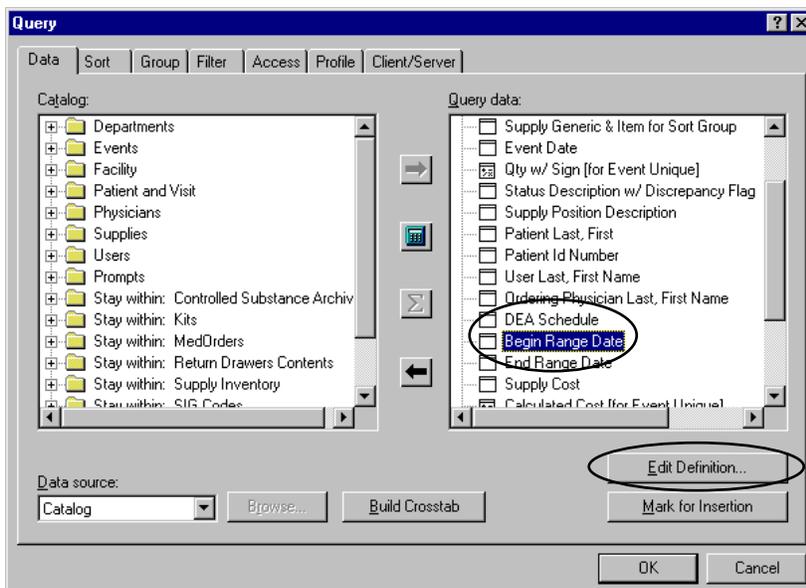
### Demo 3: Changing a Date prompt

**Objective:** We will take a Standard report, and change the date prompt to NOT include minutes and seconds.

1. From the **File** menu, select **Open**.
2. Open the **Supply Usage Report** from the *Rx Reports folder*.
3. Click on **Cancel** on the **Prompts Dialog** box.
4. Open the **Query Dialog** box (**Reports, Query** or the **Query Button**).

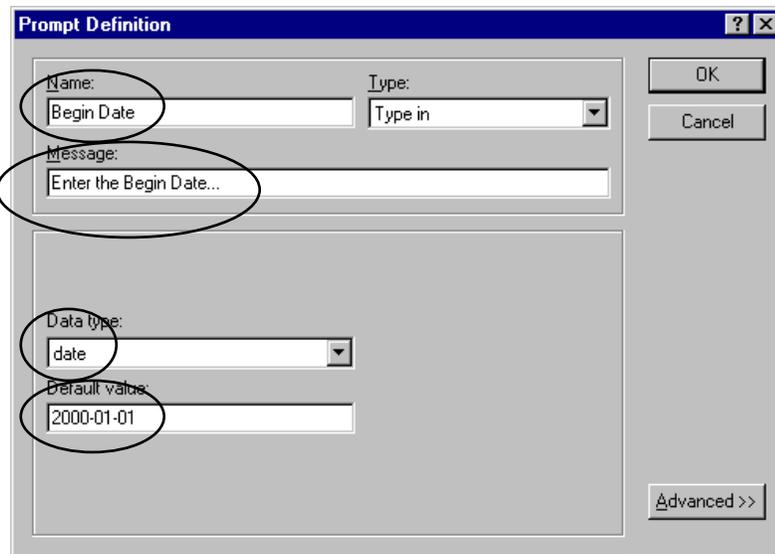
First we are going to replace the prompt dates.

5. Click on the **Begin Range Date**; Click on the **Edit Definition** button, the Data Definition window opens.



6. Edit the **Name** box to **Begin Date**.

7. Click on Begin Range Date in Expression box and **delete**.
8. Click on the **Prompt Manager...** from the **Available components** window.
9. Click on **New**.
10. Name the Prompt **Begin Date**.
11. Leave this a **Type In**.
12. In the **Message** field type: **Enter the Begin Date...**
13. **Data Type** should be **Date**.
14. Change the **default** date from **2001-01-01** to **2000-01-01** or to Required Date.



The screenshot shows the 'Prompt Definition' dialog box with the following fields and values:

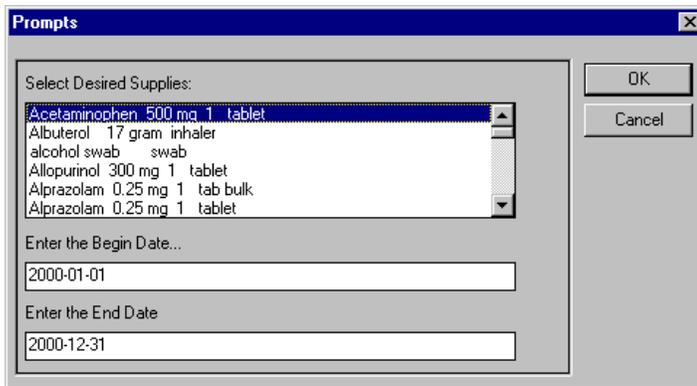
- Name:** Begin Date
- Type:** Type in
- Message:** Enter the Begin Date...
- Data type:** date
- Default values:** 2000-01-01

Buttons: OK, Cancel, Advanced >>

15. Click **OK**.
16. Click **OK** at the **Prompt Manager Window**.
17. Click **OK** at the **Data Definition** window.
18. Repeat steps 5-17 for the **End Range Date**. But for the default date change **2001-12-31** to **2000-12-31** or to Required Date.

19. Select the **Filter** tab in the **Query Dialog** box, Highlight Begin Range Date, **delete**.
20. Open **Report Columns** and select **Begin Date**.
21. Do the same for End Range Date.
22. Click **OK**.

Your new prompt should look like this:



23. Enter a **Date Range**.
24. Click **OK**.

MedSelect®		Supply Usage			Begin Date: 01/01/2000 End Date: 12/31/2000	
		02/20/2000 08:35:39 AM			Page 1 of ??	
Generic Name: Acetaminophen 500 mg 1 tablet		DEA Schedule: Defined Class:			Supply Cost: \$0.01	
Trade Name: Tylenol						
Date	Qty Status	Cost	Location Supply Position	Patient Name Patient ID # Med Order #	Route Site	User Ord. Physician
02/14/2000 08:09:02 AM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	SAMUELS, THOMAS 402 123789	Oral	LPN, Mary Doctor, Adam
02/13/2000 12:20:39 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	MARS, WILLIAM 304		LPN, Nathan
02/13/2000 12:11:58 AM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	SMITH, HENRIETTA 401		RN, Larry
02/12/2000 06:46:09 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	MARS, WILLIAM 304		LPN, Nathan
02/12/2000 09:38:00 AM	1 Taken	\$0.01	100 Drawer Module Drawer 3-1 A	SAMUELS, THOMAS 402		LPN, Mary

25. Save this report in the **MedSelect Custom Reports Folder** as **“Changing a Date Prompt”**.

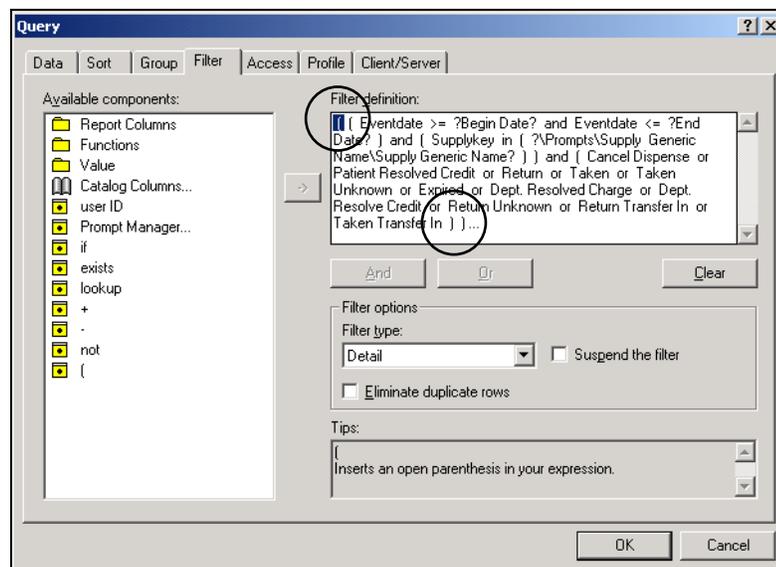
## Section 4

### Demo 4: Report Picklist Prompt Filters

**Objective:** To add a Report Picklist to a report. In this case we want to add the Location as a drop down picklist for supply usage information.

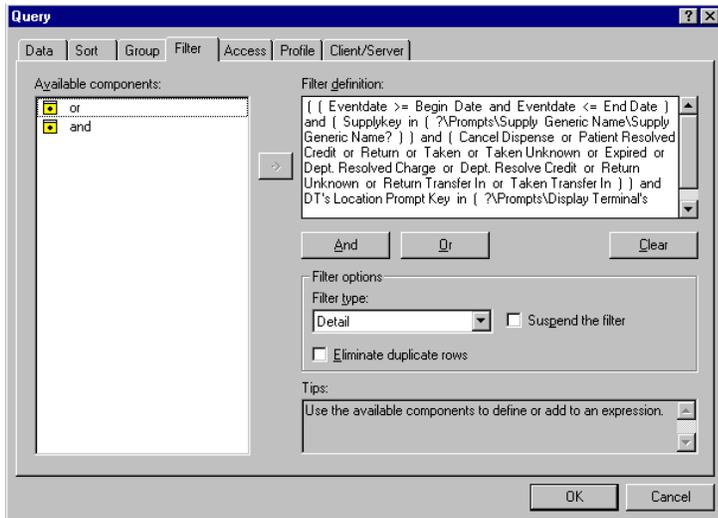
Let's start by using the Report we created for Changing the **Date Prompt**, Remember this report started as the **Standard Supply Usage Report**.

1. Open the **Changing a Date Prompt** report located in the **MedSelect Custom Reports** folder
2. Select a Medication and a one-day **Date Range**
3. Open the **Query Dialog Box (Reports, Query or the Query Button)**
4. Click on the **Filter** tab.
5. To keep the current filter intact, place parenthesis ( ) before and after the current statement.



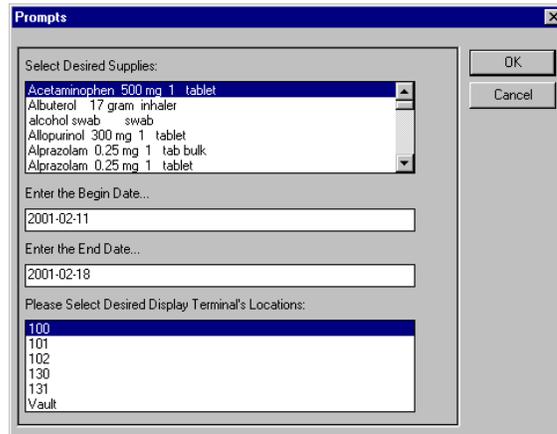
6. At the ellipsis (...) add **And**.

7. From the **Available Components** select **Catalog Columns**.
8. Open the **Prompts** folder.
9. Open the **Display Terminal's Location** folder
10. Select **DT's Location Prompt Key**.
11. From **Available components**, add the **in** operator
12. From **Available components**, add the **open** parentheses ( .
13. Repeat Steps 7 – 9.
14. Select **DT's Location**
15. From Available components add the close parentheses ) .



16. Click **OK**.

17. Input a longer **Date Interval**.



16. You could select one or Multiple Supplies and Locations, to do this simply hold down the **CTRL** key and click on the desired items. For this Demonstration we will select only one of each. Click **OK**.

17. **Rename** the report in the Report header and rename and save the report as **Report Picklist Prompt for Location** in the **MedSelect Custom Reports Folder**.

<b>MedSelect®</b>		<b>Report Picklist Prompt For Location</b>			Begin Date: 02/12/2000 End Date: 02/28/2000	
		02/18/2000 01:45:32 PM			Page 1 of ??	
Generic Name: Acetaminophen 500 mg 1 tablet Trade Name: Tylenol				DEA Schedule: Defined Class:		Supply Cost: \$0.01
Date	Qty Status	Cost	Location Supply Position	Patient Name Patient ID # Med Order #	Route Site	User Ord. Physician
02/14/2000 08:09:02 AM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	SAMUELS, THOMAS 402 123789	Oral	LPN, Mary Doctor, Adam
02/13/2000 12:20:39 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	MARS, WILLIAM 304		LPN, Nathan
02/13/2000 12:11:58 AM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	SMITH, HENRIETTA 401		RN, Larry
02/12/2000 06:46:09 PM	2 Taken	\$0.02	100 Drawer Module Drawer 3-1 A	MARS, WILLIAM 304		LPN, Nathan
02/12/2000 09:38:00 AM	1 Taken	\$0.01	100 Drawer Module Drawer 3-1 A	SAMUELS, THOMAS 402		LPN, Mary
02/12/2000 09:37:55 AM	1 Taken	\$0.01	100 Drawer Module Drawer 3-1 A	SAMUELS, THOMAS 402		LPN, Mary
<b>Supply Total Cost: \$0.09</b>						



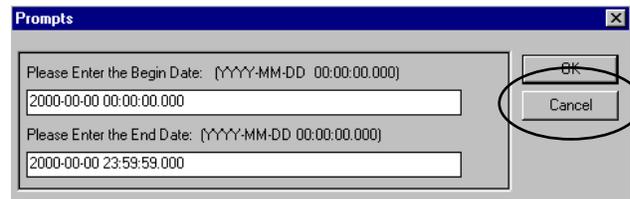
## Section 4

### Demo 5: Scheduling a Report with a Date Prompt

**Objective:** To modify a **Standard Report** so that it can be scheduled.

If a report has a **Date Range Prompt**, it must be modified in order to run the report automatically at a scheduled time. Essentially, you are making the report into an **Auto report**.

1. **Open** the standard report **Inventory Returns and Retrieves** located at C:\Program Files\Cognos\Cer1\Rx Reports.



*Remember, we cannot modify a standard report. Therefore, it must be saved first.*

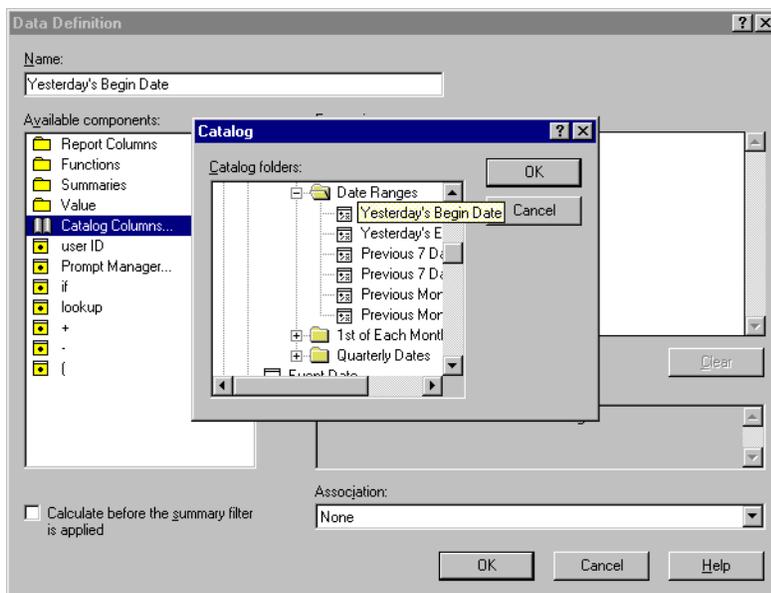
2. Press the **Cancel** button on the **Date Prompt** box.
3. **Save** this report in the **MedSelect Scheduled Reports** folder.

First let's replace our Begin Range Date

4. Open the **Query** dialog box. (Select the **Query Data** button  on the Standard PowerBar.)
5. Highlight the **Begin Range Date** in the **Query Date** box, then click the **Edit Definition** button.
6. Highlight the Begin Range Date in the Expression box in the Data Definition window and **delete** it.
7. **Open** the **Catalog Columns, Events folder, Date Filter Type: DETAIL ONLY folder, Filter Type: SUMMARY ONLY** and the **Date Ranges folder**.

Lets say we only want events that occurred the previous day.

#### 8. Select **Yesterday's Begin Date**



9. Rename the Name Box to be **Yesterdays Begin Date**.

10. Click **OK**.

11. Repeat steps 5 – 10 using the **End Range Date** and replacing it with **Yesterday's End Date**.

You have just replaced the Date Fields that print on the Header of the report.

Now let's remove the prompts from the Filter box.

13. Select the **Filter** tab

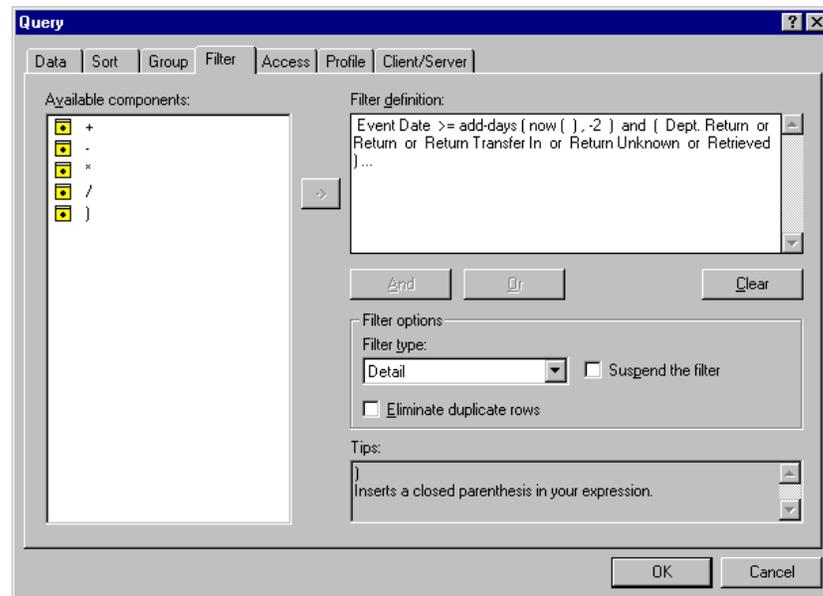
14. Highlight **Begin Range Date and Event Date <= End Range Date** and Delete.

Since we are only going back 1 (one) day we will create our own expression, rather than the predefined fields in the Events, Date Filter Type: DETAIL ONLY folder.

15. Open **Functions**, select **add-days**.

16. Open **Functions** again, select **now**.
17. Select **number** and enter **-2**.
18. Click **OK**.

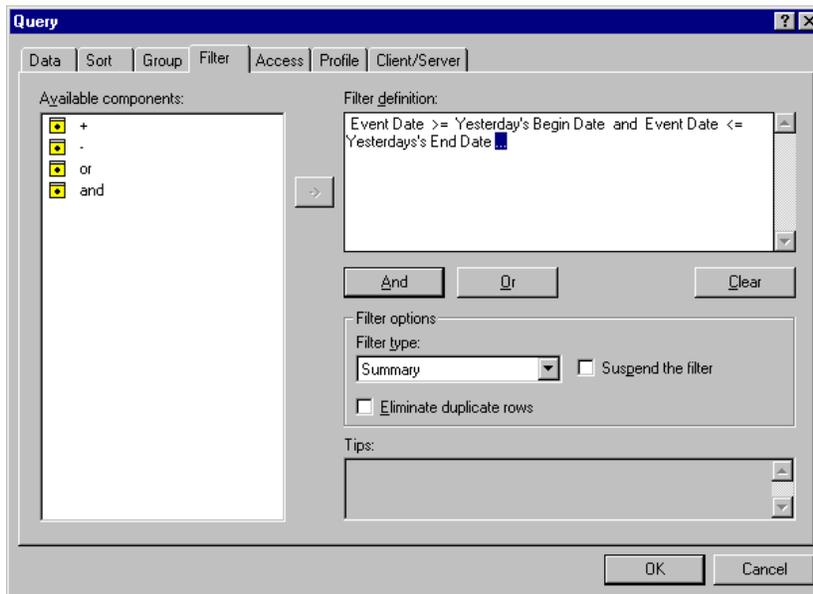
Our Filter definition no longer has prompts and will retrieve the Events for the past 2 days.



Now we want to add our Yesterdays Begin and End date to the Summary Detail Filter, to only get the previous day.

19. Open **Query Dialog** box, select **Filter** tab.
20. Choose **Summary Filter** type.
21. Open the **Report Columns**, select **Event Date**, select **>=**.
22. Open **Report Columns**, select **Yesterday's Begin Date**
23. Select **And**
24. Open **Report columns**, select **Event Date**, select **<=**.

25. Open **Report columns**, select **Yesterday's End Date**



26. Click **OK**.

The objective of an auto report is that it runs at a scheduled time without human intervention. Let's suppose this report needs to be run daily. The Filter definition must contain a function that calculates the date range to be one day, running daily. Some functions are performed on the Data base side and some functions are only performed on the Client side (user's PC). So the Administrator has created dates for you to acquire report efficiency.

<b>MedSelect®</b>		<b>Inventory Returns and Retrieves</b>			Begin Date: 02/12/2000 12:00:00 AM	
		02/13/2000 01:47:29 PM			End Date: 02/12/2000 11:59:59 PM	
					Page 1 of ??	
<b>Display Terminal's Location: 100</b>						
<b>Cabinet: Drawer Module</b>						
Supply Position	Date	Qty Status	Generic Name Trade Name	DEA Schedule Defined Class	Patient Name Patient ID #	User\Witness Reason
Drawer Module Drawer 4-4 A	02/12/2000 06:35:17 PM	1 Retrieved	propofol 1% 50 ml injection Diprivan			Technician, Amber / Admin,
Drawer Module Drawer 4-4 A	02/12/2000 06:35:08 PM	0 Retrieved				Technician, Amber / Admin,
Drawer Module Drawer 4-4 A	02/12/2000 06:31:26 PM	1 Retrieved	Erythromycin 250 mg 1 tablet Ery-tab			Technician, Amber / RN, Na
Drawer Module Drawer 4-4 A	02/12/2000 06:31:21 PM	0 Retrieved				Technician, Amber / RN, Na
Drawer Module Drawer 5-1 B	02/12/2000 06:35:18 PM	1 Retrieved	Thiopental sodium 25mg/ml 500 mg kit injection Thiopental Sodium	3		Technician, Amber / Admin,
Drawer Module Drawer 5-1 B	02/12/2000 06:34:34 PM	1 Return	Thiopental sodium 25mg/ml 500 mg kit injection Thiopental Sodium	3	OLIVER, NANCY 103	RN, Nancy
<b>Cabinet: SCM &amp; Refrigerator</b>						
Supply Position	Date	Qty Status	Generic Name Trade Name	DEA Schedule Defined Class	Patient Name Patient ID #	User\Witness Reason
Supply Cabinet Position 5	02/12/2000 06:24:54 PM	1 Return	IV-NITROGLYCERIN 50mg/500ml 500 ml infusion IV-NITROGLYCERIN		SMITH, HENRIETT 401	Manager, Nurse
<b>Cabinet:</b>						
Supply Position	Date	Qty Status	Generic Name Trade Name	DEA Schedule Defined Class	Patient Name Patient ID #	User\Witness Reason
	02/12/2000 06:34:00 PM	1 Return	propofol 1% 50 ml injection Diprivan		OLIVER, NANCY 103	RN, Nancy
	02/12/2000 06:30:48 PM	1 Return	Erythromycin 250 mg 1 tablet Ery-tab		SMITH, HENRIETT 401	Manager, Nurse

27. Save this report again in the **MedSelect Scheduled Reports** folder.

This report is now ready for scheduling

28. From the **Tools** menu of **Examiner**, select **Scheduler**.

29. From the **Insert** menu of **Scheduler**, select **Recurring Task**.

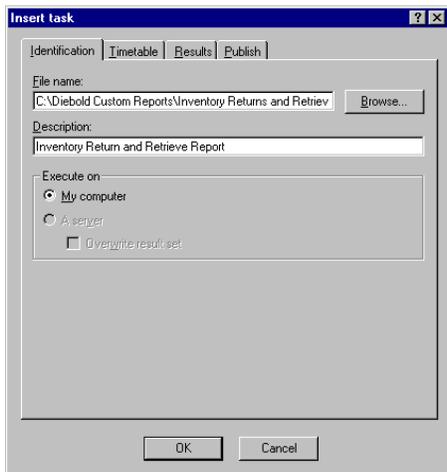
The **Insert Task** window is displayed.

30. Click on the **Browse** button.

31. Select the report from the **MedSelect Scheduled Reports** folder.

32. In the **Description** field, type **Inventory Return and Retrieve Report**

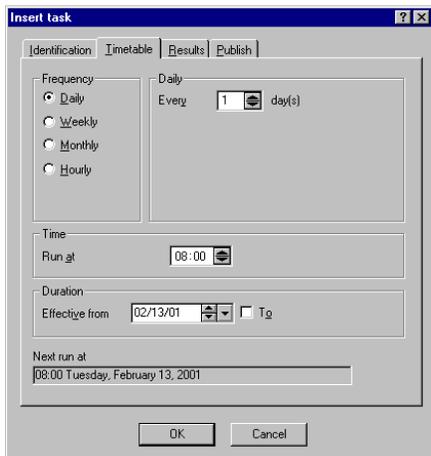
33. Be sure it is selected to execute on My Computer.



34. Select the **Timetable** tab.

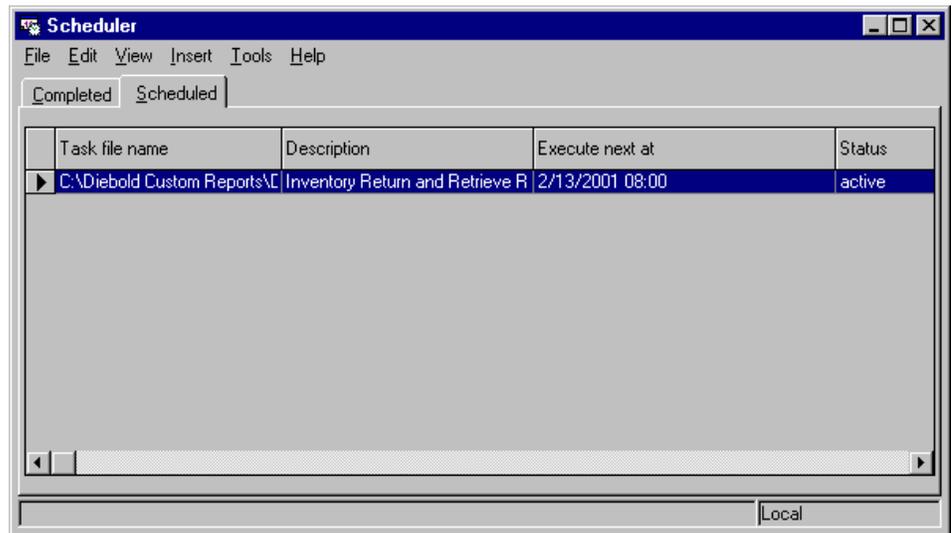
35. Click on the **Daily** radio button.

36. Select any run time



37. Click on the **Results** tab and select a printer

38. Click **OK**.



Notice the report is now in the Scheduler to print.



## Section 5

### Demo 5:1 Advanced Formatting

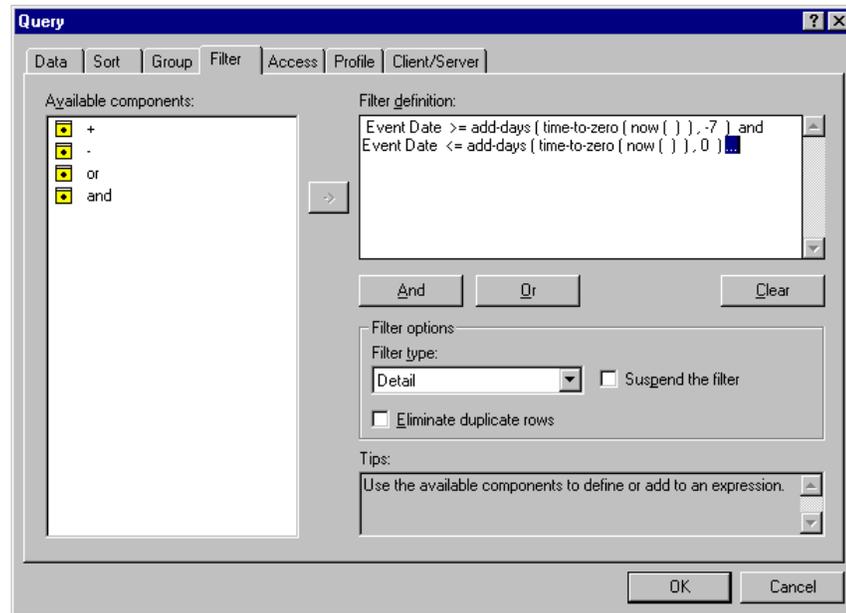
**Objective:** To create a report that displays Narcotic Usage by User. The following frames will be used: Form Frame, Text Frame, and List Frame. This exercise will include filtering, data definitions, and basic formatting.

This custom report will accomplish the following objectives:

- Display usage information by med/supply
  - Display only controlled substance usage
  - Display total usage by user
  - Display usage in chronological order
  - Utilize formatting to help the report be more user-friendly
1. From the menu bar, select **File** and then select **New**.
  2. Select the **Simple List** template located under the **Standard** tab.
  3. Click **OK**.
  4. Double click on the **Events** folder to display its contents.
  5. Double click on the following to add them to the **Query Data** list:
    - Cabinet Location Number
    - Event Date
    - Quantity
    - Status Desc.
    - User Last, First
  6. Double Click on the **Supplies** folder to display its contents:
    - DEA Schedule
    - Supply Generic Name, Strength, Size, Units, Form

Because this report has an Event Date it is necessary to create the Date filter expression before executing the report.

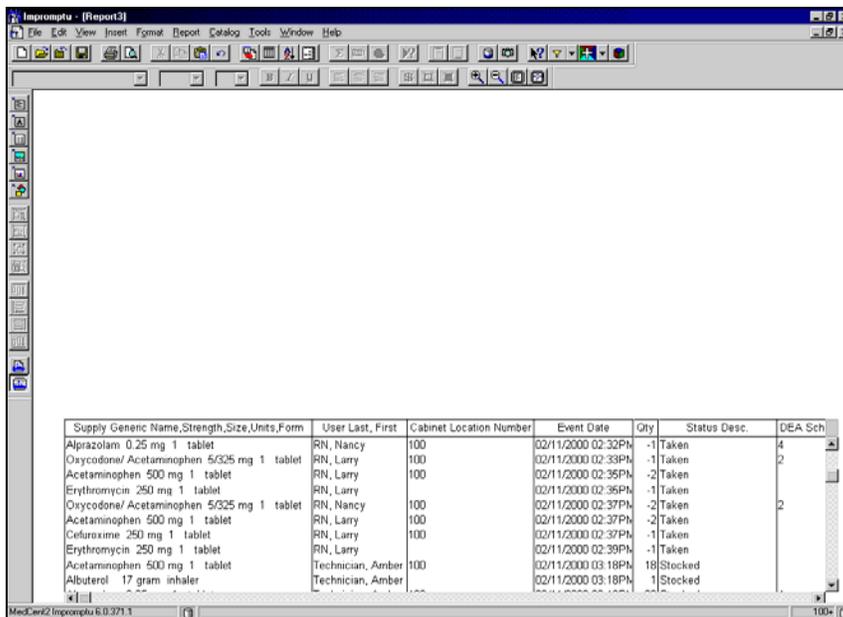
7. Select the **Filter Tab**.
8. Double click to open the **Reports Column** folder.
9. Select **Event Date** and  $\geq$ .
10. Next select **Functions** and **Add-Days**
11. Select **Functions** and the expression **Time-to-zero**
12. Again select **Functions** and this time the expression **Now**.
13. Next select **Number** and change to  $-7$ , to make this a weekly report.
14. Select the **ellipsis (...)** in the Filter Definition box to indicate the completion of typing.
15. Click on the **And** button.
16. Double click to open the **Reports Column** folder.
17. Select **Event Date** and  $\leq$ .
18. **Repeat steps 10 – 12.**
19. Select **Number** and double click to add to expression.
20. Leave the number that is added to the expression at **zero**.



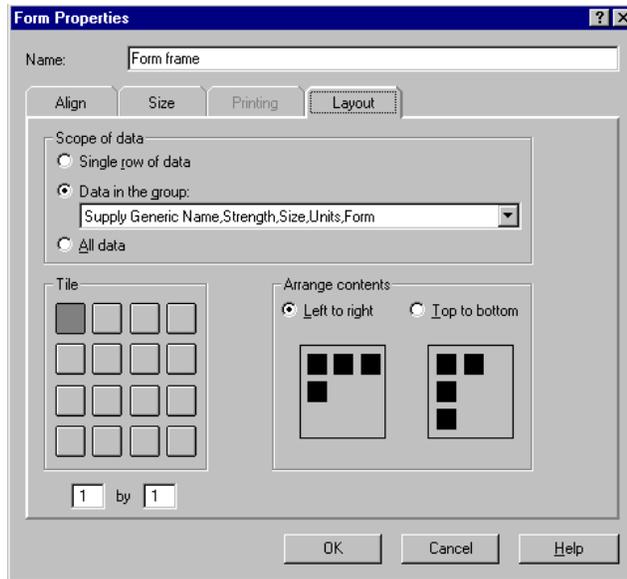
21. Click on **OK** to display the report.
22. To allow for future enhancements to this report, change the page orientation from portrait to landscape. To do so, select **File**, and then select **Page Setup**. In the Page Orientation section, select **Landscape**.
23. Select **OK** to display the report in landscape orientation.
24. Change the view of this report to Screen Layout. From the **View** menu, select **Screen Layout**.
25. Press **ESC** to clear any selections.
26. Select a **User Name** data element. While holding down on the left mouse button, move the column to the far left and drop the column. (Do not drag into the column header, as this will cause a cross tab query report to be created.)
27. Select a **Supply Generic Name, Strength, Size, Units, Form** date element. While holding on the left mouse button drag the field to the far left and drop the column. (Do not drag into the column header, as this will cause a cross tab query report to be created.)

Supply Generic Name,Strength,Size,Units,Form	User Last, First	Cabinet Location Number	Event Date	Qty	Status Desc.	DEA Schedule
Alprazolam 0.25 mg 1 tablet	RN, Nancy	100	02/11/2000 02:32PM	-1	Taken	4
Oxycodone/ Acetaminophen 5/325 mg 1 tablet	RN, Larry	100	02/11/2000 02:33PM	-1	Taken	2
Acetaminophen 500 mg 1 tablet	RN, Larry	100	02/11/2000 02:35PM	-2	Taken	
Erythromycin 250 mg 1 tablet	RN, Larry		02/11/2000 02:35PM	-1	Taken	
Oxycodone/ Acetaminophen 5/325 mg 1 tablet	RN, Nancy	100	02/11/2000 02:37PM	-2	Taken	2
Acetaminophen 500 mg 1 tablet	RN, Larry	100	02/11/2000 02:37PM	-2	Taken	
Cefuroxime 250 mg 1 tablet	RN, Larry	100	02/11/2000 02:37PM	-1	Taken	
Erythromycin 250 mg 1 tablet	RN, Larry		02/11/2000 02:39PM	-1	Taken	
Acetaminophen 500 mg 1 tablet	Technician, Amber	100	02/11/2000 03:18PM	18	Stocked	
Albuterol 17 gram inhaler	Technician, Amber		02/11/2000 03:18PM	1	Stocked	
Alprazolam 0.25 mg 1 tablet	Technician, Amber	100	02/11/2000 03:18PM	20	Stocked	4
Alprazolam 0.25 mg 1 tablet	Technician, Amber	100	02/11/2000 03:18PM	12	Stocked	4
Atenolol 50 mg 1 tablet	Technician, Amber		02/11/2000 03:18PM	9	Stocked	
Atropine 0.4mg/1ml 1 ml injection	Technician, Amber	100	02/11/2000 03:18PM	20	Stocked	
Buffered Aspirin 325 mg 1 tablet	Technician, Amber	100	02/11/2000 03:18PM	30	Stocked	

28. Select any data item in the **List Frame**.
29. From the **Edit** menu, select **Select Parent**.
30. The **List Frame** is now selected (highlighted). To allow room to create a **Form Frame**, size the **List Frame** so it is displayed in the lower half of the available screen display. (Use the handles of the **List Frame**).
31. Press **ESC** to clear the selection.



32. Insert a Form Frame in the upper portion of the screen display. To do so, select the **Insert** menu, then select **Form Frame**.
33. Draw the outline of the **Form Frame** in the space just created.
34. Select the first data item in the **Supply Generic Name, Strength, Size, Units, Form** column of the **List Frame**.
35. Drag and drop it in the **Form Frame**.
36. Each **Supply Generic Name, Strength, Size, Units, Form** displays on a separate page. The objective is to display detail about each **Generic Name** in the **Form Frame**. To view additional meds, page down to the next pages. (This cannot be accomplished until additional formatting is done.) Select any data item in the **List Frame**.
37. From the **Edit** menu, select **Select Parent**. (The entire **List Frame** is now selected.)
38. This List Frame will be inserted into the Form Frame as detail for each Supply Generic Name. From the **Edit** menu, select **Cut**.
39. From the **Edit** menu, select **Paste**.
40. Move the cursor (the refresh paint brush) into the **Form Frame**.
41. Click to refresh the **Form Frame**. (It may be necessary to resize the Form Frame and its contents.)
42. Select the **Form Frame**.
43. Right-click and select **Properties**.
44. Click the **Layout** tab.
45. For the Scope of Data, select **Data in Group**.



46. From the **Data in Group** drop down list, select **Supply Generic Name, Strength, Size, Units, Form**.
47. Click **OK**.
48. Press **ESC** to clear selections.

By setting the properties for the Form Frame, the data is now grouped by Supply Generic Name. To verify this, open the Group dialog box and note that Supply Generic Name is now grouped. (From the Report menu, select **Query**. Select the **Group** tab option.)

The Form Frame has scroll buttons to scroll through the list of supplies and their corresponding data. The List Frame that resides in the Form Frame also has scroll buttons. This allows for all data to be displayed for the corresponding supply even if the List Frame is small.

**Note:** The List Frame contains information for only one supply. Information on additional supplies can only be accessed by scrolling to the next copy of the Form Frame.

**Lets do some additional formatting to make this report a bit more user-friendly.**

49. Move **Supply Generic Name, Strength, Size, Units, Form** data element to the right side of the report.

50. The data field displaying the Supply Generic Name should be labeled to indicate what this value is. From the **Insert** menu, select **Text Frame**.
51. Draw the outline of the **Text Frame** near the Supply Generic Name, Strength, Size, Units, Form value. (Do not be too concerned with the position of this frame since it can be easily moved.)
52. Type in the name of the corresponding field: **Supply Generic:**, hit **ESC**.
53. Move the two **Text Frames** so that they line up. (It may be advisable to resize the frames as needed.)
54. Use the alignment buttons to align the two **Text Frames**. 
55. This report can also be improved by grouping the **UserLast, First** so that the user name doesn't appear with every line of associated data. It is also logical to have event dates in chronological order. From the **Report** menu, select **Query**.
56. Select the **Group** tab and group by **UserLast, First**.
57. Select the **Sort** tab and sort the **Event Date** in **Ascending** order.
58. Click **OK**.
59. The Cabinet Location Number will be used in a **Prompt** but is not needed in this report view.
60. Select a data element in the **Cabinet Location Number** column and **Delete** the column
61. Next **Click** on a data element in one of the columns and **Select parent** to highlight the entire **List frame**.
62. Next grab the left **“handle bar”** and drag the frame to the right, resizing the frame.

Our report is significantly improved. Notice that all events are displayed including stocks, expirations, etc. The objective of this report was to display usage for controlled substances. Therefore, let's filter the event status to display only Taken, Wasted, Return, Patient Resolved Charge and Patient Resolved Credit. The only medications that need be displayed are those that are scheduled.

63. From the **Report** menu, select **Query**.
64. Select the **Filter** tab option.

We must add to the filter:

65. Select “**and**”

**Let's create a filter definition using the “in” operator and “select values”**

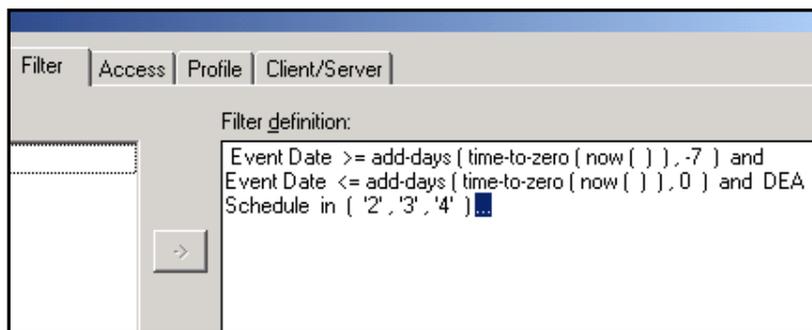
66. From **Report Columns** select **DEA Schedule**

67. Next select “**in**” from the available components

68. Next select the open parentheses ( and finally **Select Values**

69. Using the **Ctrl** key, select as many elements as wanted in this case only **Schedules 2, 3, and 4** are available in our database.

70. Finally select the closed parentheses ) to complete the expression.



71. Click **OK**.

A bit more formatting will clean up this report. Since we have filtered to display only the scheduled medications, the DEA Schedule information is not necessary to be displayed. Also, the quantity information shows Taken events and negative and Return events as positive. It would be nice to show the Taken events as positive values and the Return events as negative values. It's also easier to evaluate this report if the quantities are summarized for each user.

72. From the **Report** menu, select **Query**.

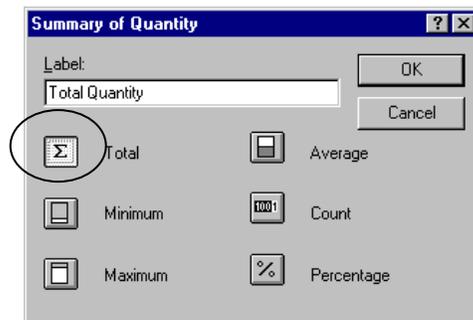
73. Select the **Data** tab option.

74. Click on the **Events** folder.

75. Select the **Quantity** data item. (Do not double-click.)

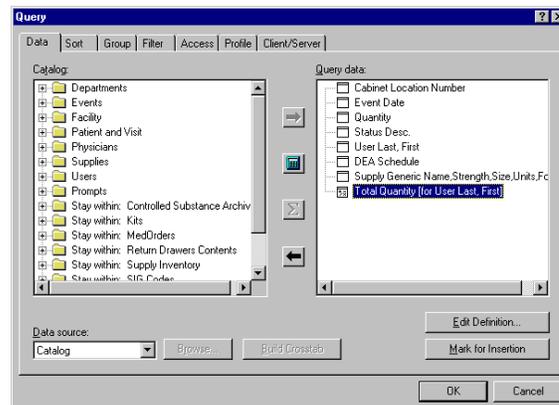
76. Click on the **Summary** button 

77. Select the **Total** button.



78. Click **OK**.

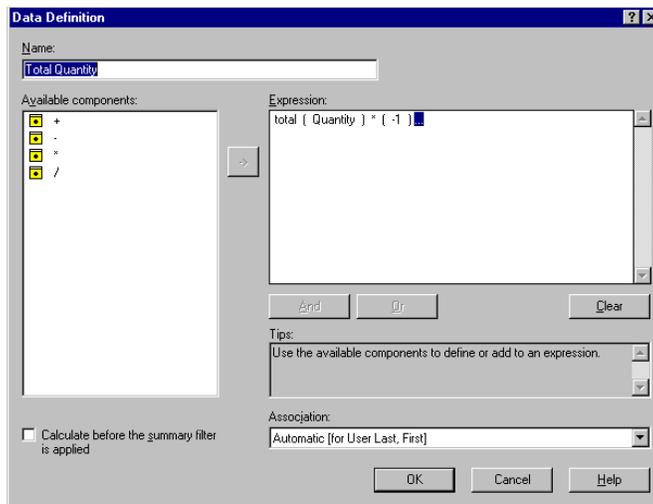
79. Total Quantity is now displayed in the Query Data box.



We want to display the negative numbers (taken events) to positive numbers.

80. With **Total Quantity** selected, select the **Edit Definition** button.

81. Edit the **Data Definition** field to read: **total ( Quantity ) \* ( -1 ) ...**



82. Click **OK**.

83. Click **OK**.

84. With the **Form Frame** displayed, select the **Quantity** and **DEA Schedule** columns. (Use the control key to select both.)

85. From the **Format** menu, select **Hide**. (The **Quantity** and **DEA Schedule** columns are no longer displayed.)

86. Select a **data field** in the **List Frame**.

87. From the **Edit** menu, select **Select Parent**.

88. From the **Insert** menu, select **Data**.

89. Click in the **List Frame** to display the **Data** tab of the **Query dialog** box.

90. In the **Query Data** list box, select **Total Quantity**.

91. Select the **Mark for Insertion** button.

92. Click **OK**.

Finally, let's filter this report down to just **Taken** Events.

93. Select a data element that has a value of **Taken** in the **Status Description** column.

**Supply Generic:** Alprazolam 0.25 mg 1 tablet

User Last, First	Event Date	Status Desc.	Total Quantity
LPN, Mary	02/12/2000 09:34AM	Taken	2
	02/14/2000 08:06AM	Taken	
Nurse, Ryan	02/14/2000 12:03PM	Taken	1
RN, Larry	02/12/2000 06:50PM	Taken	2
	02/13/2000 08:15PM	Taken	
RN, Martha	02/13/2000 08:12AM	Taken	1
RN, Nancy	02/11/2000 02:30PM	Taken	3
	02/11/2000 02:31PM	Wasted	
	02/11/2000 02:31PM	Wasted	
	02/11/2000 02:32PM	Taken	
	02/12/2000 03:39PM	Taken	
	02/13/2000 02:17PM	Taken	
	02/13/2000 02:17PM	Patient Resolved Credit	

94. From the drop down arrow to right of the filter button, choose **=** and **selection**. This will filter the report down to just the status desc. Taken that was selected.

This custom report now displays our initial objectives.

95. **Save** this report in the **MedSelect Custom Reports** folder and name it: **Scheduled Medication Usage by User**.



## Section 5

### Demo 5:2 Chart Frames

**Objective:** To edit the previous report created (Scheduled Medication Usage by User) by adding a Chart Frame and a Picture Frame.

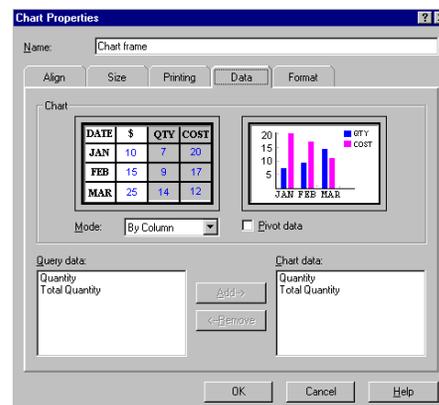
This custom report will accomplish the following objectives:

- Graphically display usage by user for each Scheduled Medication.
- Add a logo to the report.
- Utilize formatting to help the report be more user-friendly.

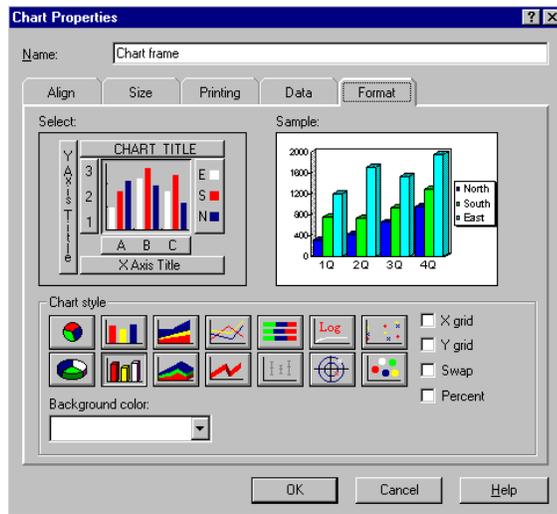
1. From the menu bar, select **Open**
2. Open the **Scheduled Medication Usage by User** from the MedSelect Custom Reports
3. From the **Insert** menu, select **Chart Frame**.
4. Draw the outline of the Chart Frame on the left side of the current report.

The Chart Properties dialog box is automatically displayed.

5. From the Chart data list box, remove **Quantity**.



6. Select the **Format** tab.



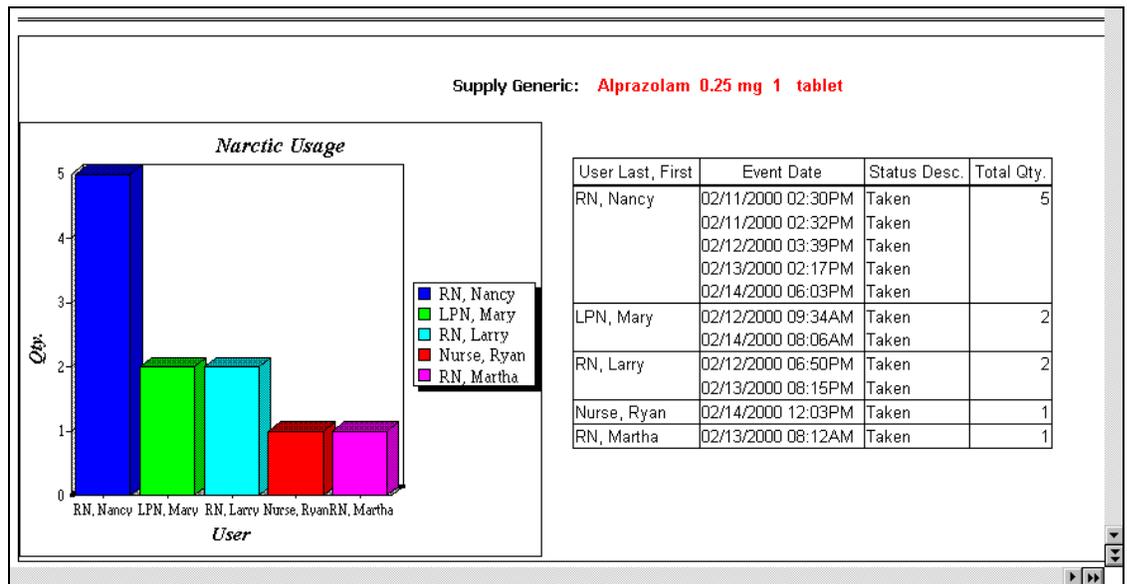
7. The **3-D Bar graph** is selected by default. Keep this selection.
8. Select the **Y Axis Title** button.
9. In the **Title** field, type in **Qty**.
10. Select the **Font** button.
11. Change the font to **Script** and select **OK**.
12. Select the **X Axis Title** button.
13. In the **Title** field, type in **User**.
14. Select the **Font** button.
15. Change the font to **Script** and select **OK**.
16. Select the **A B C** button.
17. Select the **Font** button.
18. Keep the font the same but reduce the size.
19. Click **OK**.

20. Select the **Chart Title** button.
21. In the Title field, enter a chart title such as **Narcotic Usage**
22. Select the **Font** button and change the font to **Bold Italic** and reduce the size.
23. Click **OK**.
24. Click **OK**.

Now, let's rearrange the report so that the use is displayed from the most to the least.

25. Select the **Query Data** box.
26. Select the **Sort** tab. Select the **Total Quantity** and change the sort to **Descending**.

The report now lists the use from most to the least.



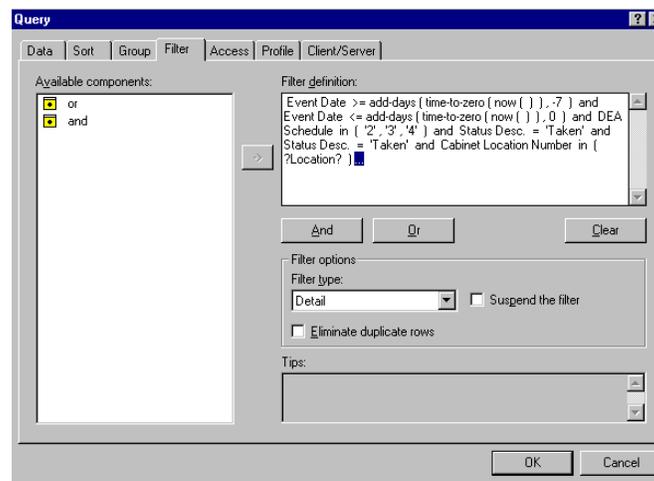
**Additional formatting can be done to 'spiff up' this report.**

1. With the Chart Frame selected **Format** and the **Borders**.
2. Select the **Box** button and set the color to **Gray**.
3. Click **OK**.
4. From the **Format** menu, select **Styles**
5. Select **Light Emboss**.
6. Select **Apply**; then select **Close**.
7. Select the **Supply Generic** text frame
8. From the **Format** menu, select **Font**.
9. Change the font to **Tahoma, Bold** and size **10**.
10. Click **OK**. (The fields may need to be resized.)
11. Select the **Text Frame** containing the database **Supply Generic Name, Strength, Size, Units, Form**.
12. From the **Format** menu, select **Font**.
13. Change the **Font Style** to **Bold** and the Color to **Red**.
14. Click **OK**.

Finishing this report will include adding a **Location Prompt**.

15. Open the **Query Data** box, select filter tab.
16. Select the **AND** button.
17. From the **Available Components** box, select **Catalog Columns**.
18. Select the **Prompts** catalog folder.
19. From the Prompts folder select the **Cabinet Location** sub-folder.

20. Select the **Cabinet Location Prompt Key**.
21. Select the **=** operator, **open parentheses (**.
22. Returning to the **Available Components** box, select **Catalog Columns**.
23. Select the **Prompts** folder.
24. From the **Prompts** folder, select the Cabinet Location folder, then, **?Cabinet Location**.
25. Finish the expression with a **closed parenthesis )**.



26. The expression is complete. **Click** on **OK** and you will be prompted to select a location.

Finally it is necessary to add the location being displayed to the report.

27. From **Insert** select **Data** and drag the icon , to the left of the Supply Generic Name, left click and the Query Data box will open.
28. Select **Cabinet Location Number**. From the Query Data box, click on **Mark for Insertion** and **OK**.
29. The **Location** will appear in the Text frame.

30. Insert a **Text Frame** to the left of the Location Data element and Type in **Location; hit ESC.**
31. **Adjust** and **align** the text box and Cabinet Location box.
32. Remove the **Status Desc** from the report. Select a data element in the **Status Desc.** column.
33. Click the **Delete** key to remove it from the report view.
34. Select the **Total Quantity** header. Change the title to **Total Qty.**
35. Change back to **Page Layout View.** By going to View Page Layout
36. Double click on Header Text and type **7-Day Narcotic Usage Graph Report**

If this report were for a presentation, it would be nice to display the hospital logo at the top.

37. From the **Insert** menu, select **Picture Frame.**
38. Draw the outline of the **Picture Frame** in the upper right hand corner of the current report.
39. The **Picture Properties** dialog box is automatically displayed.
40. With the Source tab selected, select the **Browse** button.
41. The MedSelect logos are located in the Logo folder on the C: drive. Select the logo called **MedSelect.bmp**
42. Click **Open.**
43. Click **OK.**
44. To delete the border of the Picture Frame, select **Format** and then select **Borders.**
45. Select the **None** button and then click **OK.**

Additional formatting can be done until the report is as you desire.

