Chapter 2
Getting Started

This chapter—

- Lists the system requirements required to run RxSolution
- Describes how to connect RxSolution to the database
- Explains how to get started
- Describes the steps to follow when setting your own default options (e.g., for accounts, record numbering, standard content tables)
- List Numbering information for system Administrators.

Preparing to Use RxSolution

System Requirements

Before RxSolution can be installed, your computer or computers need to meet the minimum system requirements for RxSolution described in Table 2-1.

Table 2-1. System Requirements for RxSolution

Component	Minimum Requirement
Microprocessor/CPU	Pentium IV or higher
Memory	Minimum 2GB of RAM for the client and 4 GB for the server for SQL 2005
Hard disk free space	10 GB
Additional drive	CD-ROM
Operating system	Windows XP, Windows Vista, Windows 7, or Windows Server 2003
Printers	Windows-compatible printer to print A4 size documents and a thermal label printer
Other devices	Mouse , keyboard, and sufficient USB Ports
Network	Network adapter card and cabling if RxSolution is to be used by multiple users on the same network
Power backup	Uninterruptible Power Supply (UPS) minimum 500 VA

Installing RxSolution

Contact your assigned agent to install RxSolution at your site.

Networking in a Windows Environment

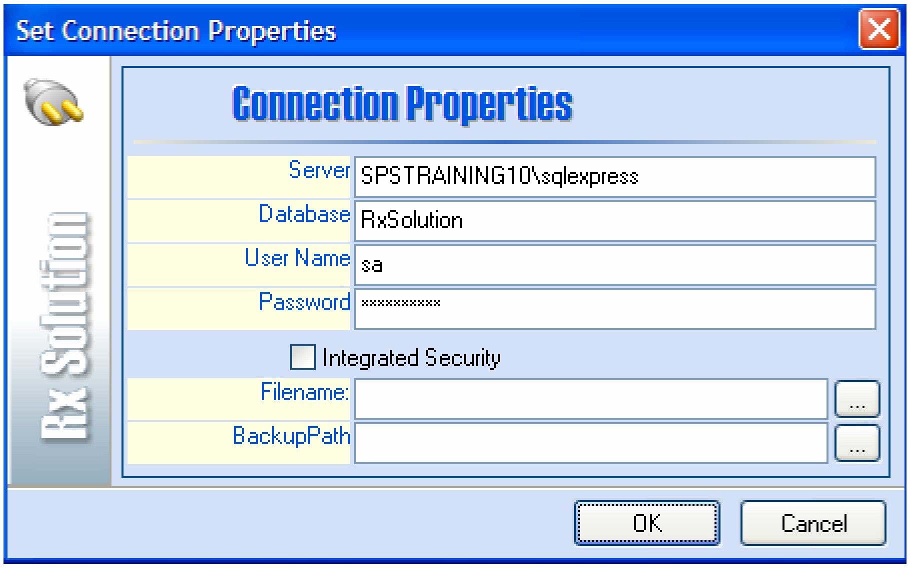
RxSolution can be installed on a network to enable multiple users to access the program from different computers. Installing RxSolution on a network is essentially the same as installing it on a hard disk on an individual, stand-alone computer.

The network administrator is to decide on which computer the database files will be placed. This machine will be called the *server*. See minimum requirement for a server in table 2-1. All other machines should then be set up to connect to this server to share the same database. The database files should be located on the server and should be called *RxSolution for the data and log files* These files must be attached to a Microsoft SQL Server. The file names may be different depending if there is more than one database on the server..

Connecting RxSolution to the Database

1. Click on the **Connect** icon 

.



2. Type in the **Server** name and the **Database** name.

3. Place a check mark in the **Integrated Security** check box if the server database is not managed by a security login and password; otherwise, enter the login **User Name** and **Password** as set-up in SQL under Security – Logins

4. Click on the **OK** button to continue. The **Log On** button 

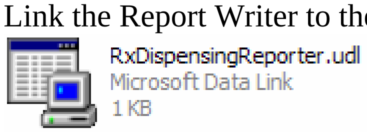
will now be active.

5. Close RxSolution by clicking on the **Exit** button 

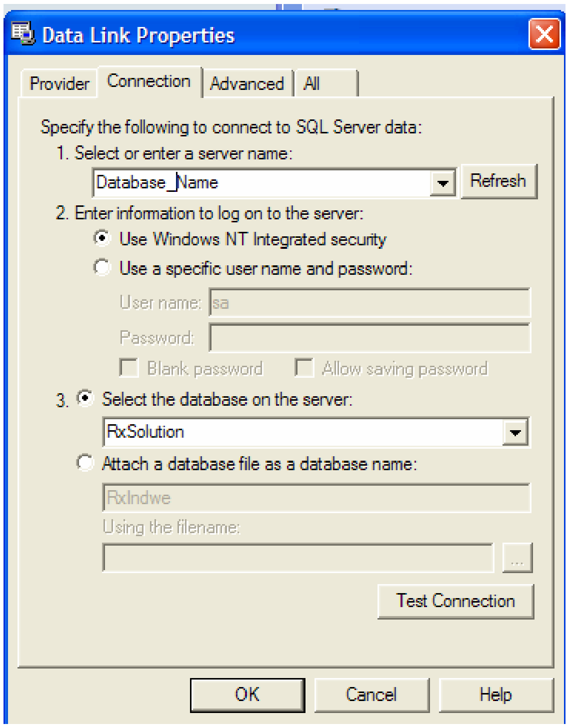
.

6. Create a Shortcut to the Desktop for the RxSolution.exe

7. Link the Report Writer to the Database by running RxDispensingReporter.udl



8. Enter the same information as for the Connection Properties

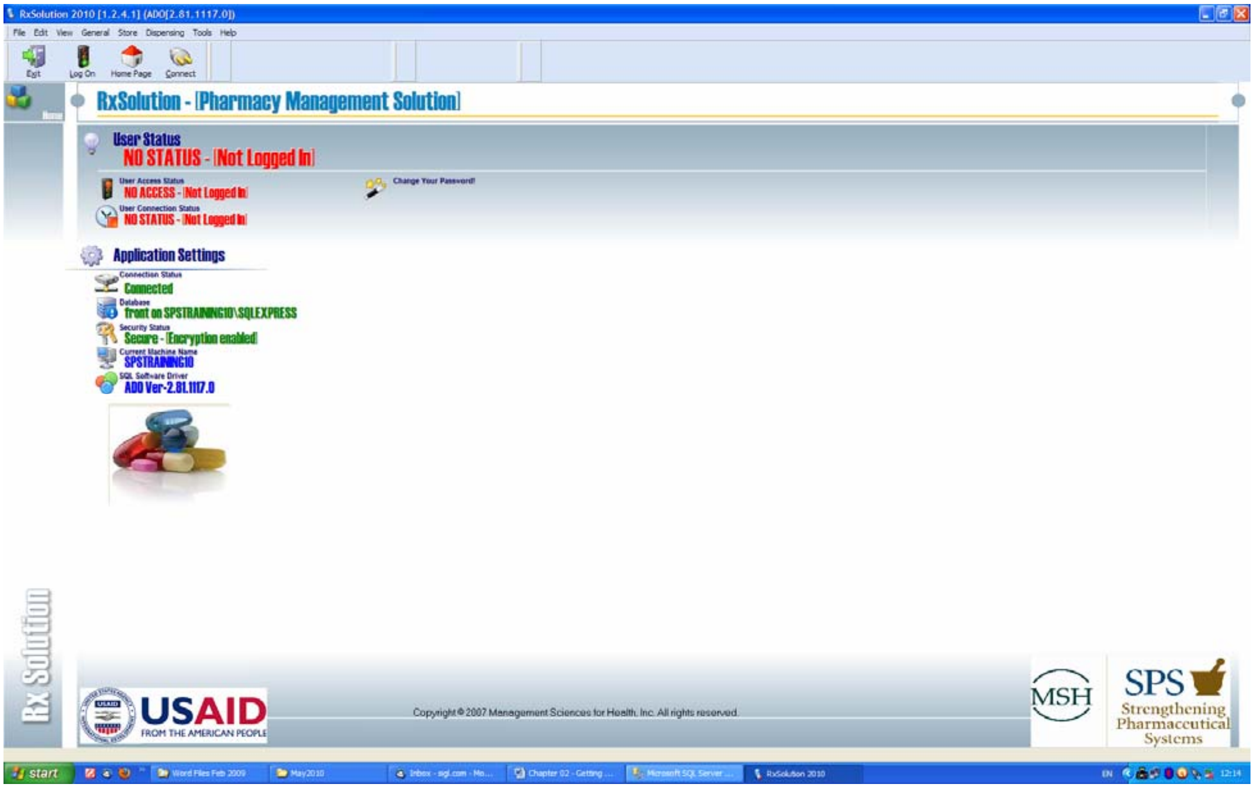


Using RxSolution for the First Time

How Do I Start the RxSolution Program?

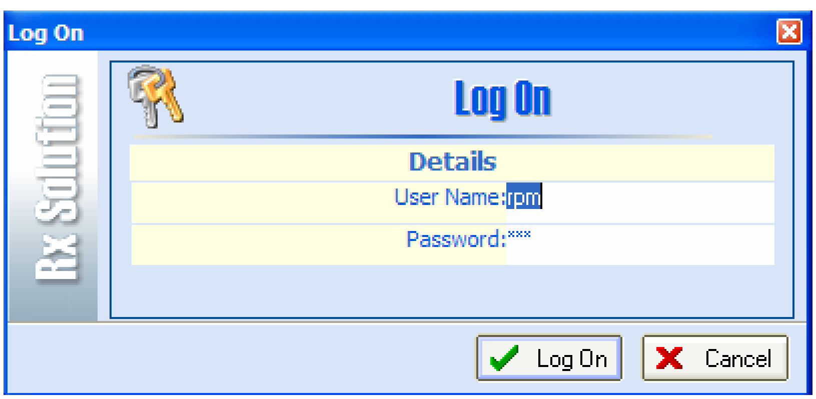
1. Click on the **RxSolution** shortcut icon 

on the computer desktop. Once the RxSolution program is loaded, the following screen will be displayed.



3. Click on the **Log On** button  on the left side of the toolbar.

4. The following screen appears—



5. Click on **Log On**.

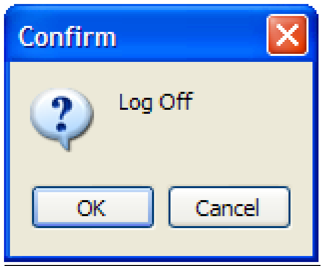
6. A default user name and password is issued with RxSolution. You may change this default user name and password and create your own after the installation.

How Do I Exit the RxSolution Program?

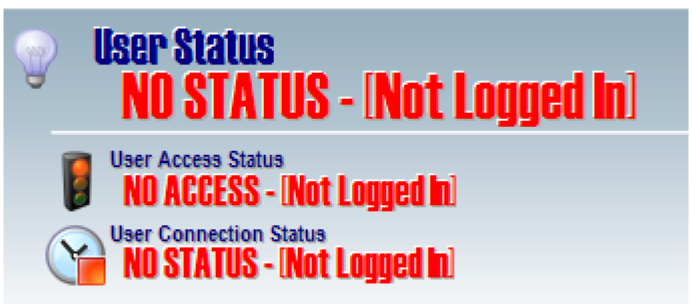
1. Located on the toolbar at the top of the screen, click on the **Log Off** button 

.

2. A window will open to ask you to confirm that you want to log off. Click **OK**.



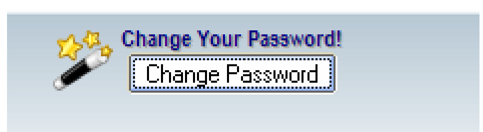
3. The main screen **User Status** will change to reflect that you are not logged in, as shown in the following screen.



4. Click on the **Exit** button 

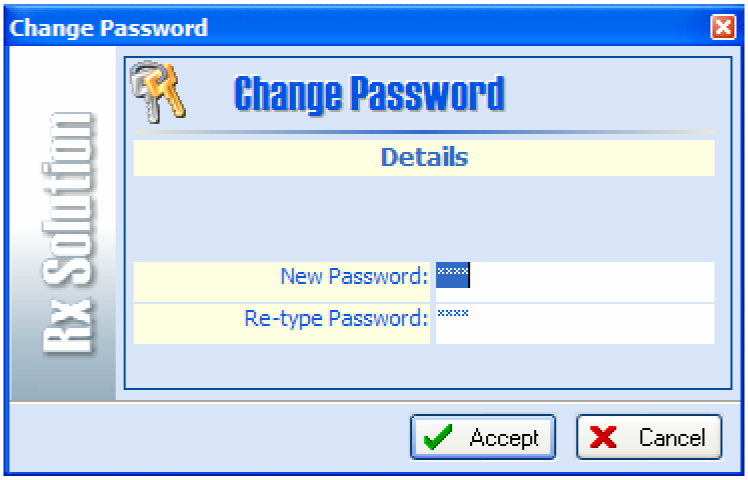
to exit RxSolution.

How Do I Change the Default Log In Password?

1. Click on **Change Password** 

.

2. First type in the old password, then overwrite the password by typing in a new password in the space provided and confirming the new password by typing it in again in the second box provided.

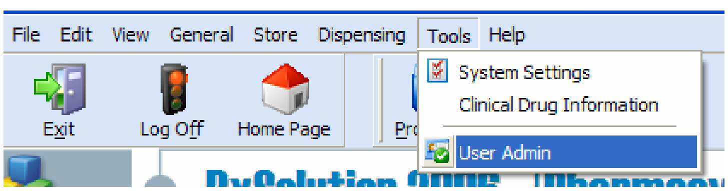


3. Click on **Accept**  and your new password is confirmed.

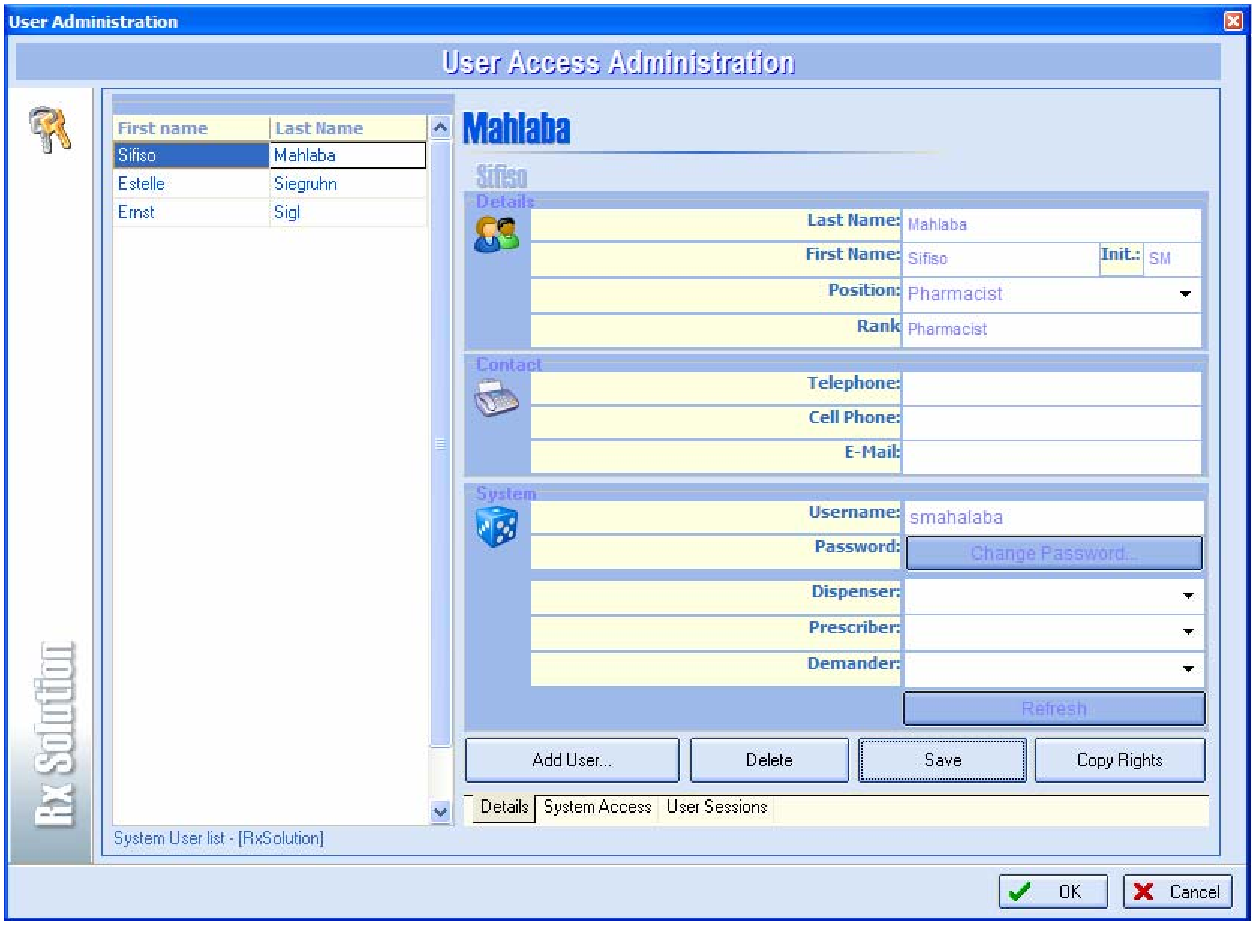
How Do I Add a User?

1. Click on **Tools** in the menu bar.

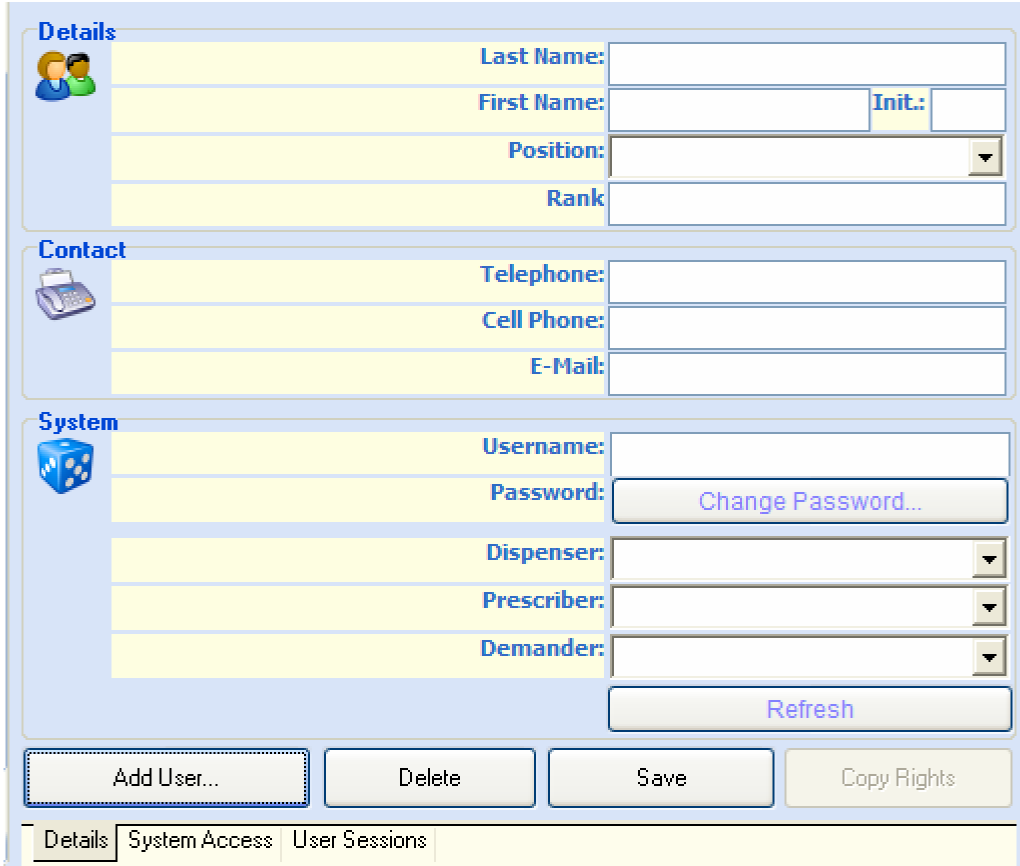
2. Choose **User Admin** from the drop-down list (see below).



3. On the **User Access Administration** screen, click on **Add User**, which appears at the bottom of the screen.

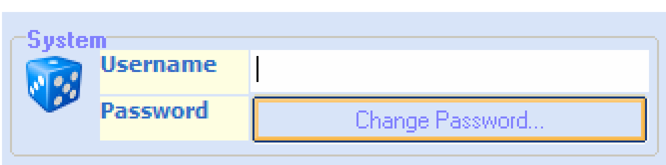


4. Fill in the details of the user (e.g., name, position, and contact details).

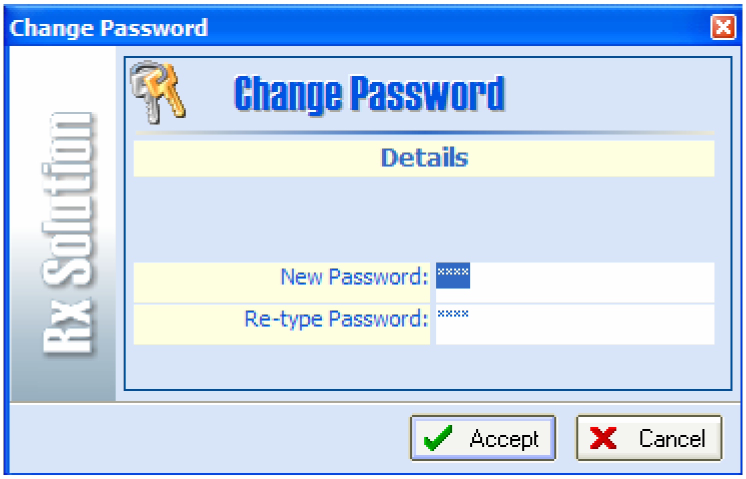


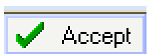
5. Enter the **Username** that will be the login name for that user in the space shown below.

6. Click on **Change Password**.

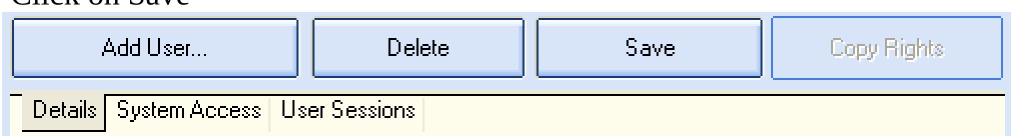


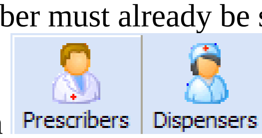
8. Type and confirm a new password for the new user.



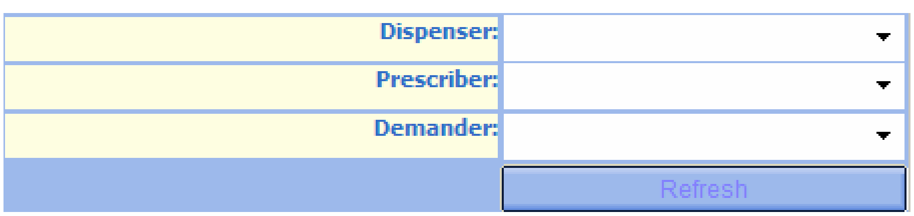
9. Click on Accept 

10. Click on Save



11 If required, enter a default dispenser's or prescriber's name at **Dispenser or Prescriber** . Doing this will create a default dispenser/prescriber when dispensing/prescribing a prescription on RxSolution. Note: The dispenser/Prescriber must already be set up under **Dispensers/Prescibers** before a name can be chosen 

. See Chapters 14 and 15 for details.



12. Enter the Demander Name from the drop-down if the user is to be restricted to a specific Demander i.e. a Sister ordering on a computer at a ward to only be able to choose her own demander name at the requisitions procedure.

12 Click on **Refresh** 

.

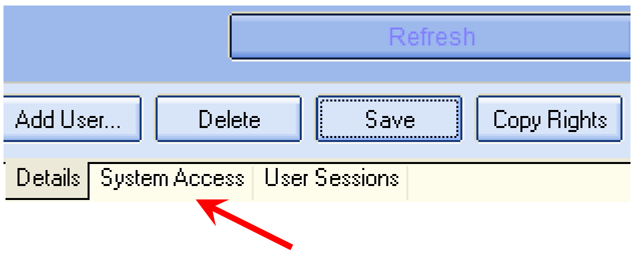
How Do I Assign the User Access Rights to the System?

Two methods can be used to assign access rights—

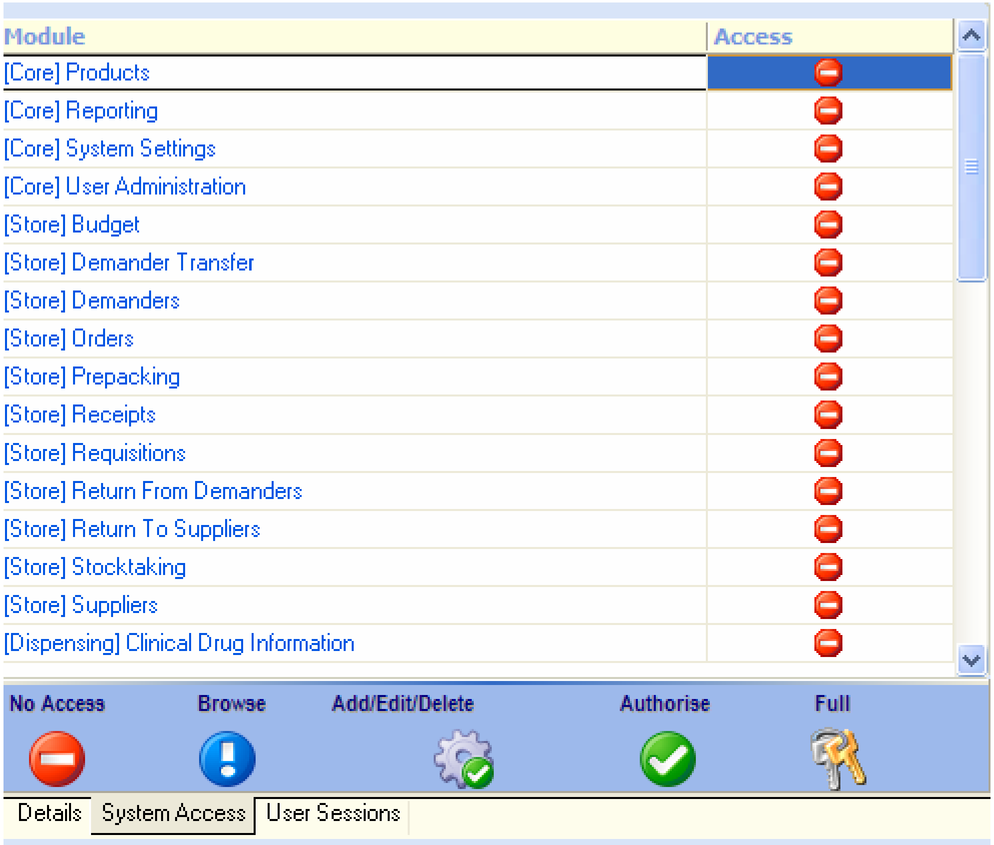
- Set up from new.
- Copy an existing user's access rights.

Set Up from New

1. Highlight the new user and click on **System Access.**



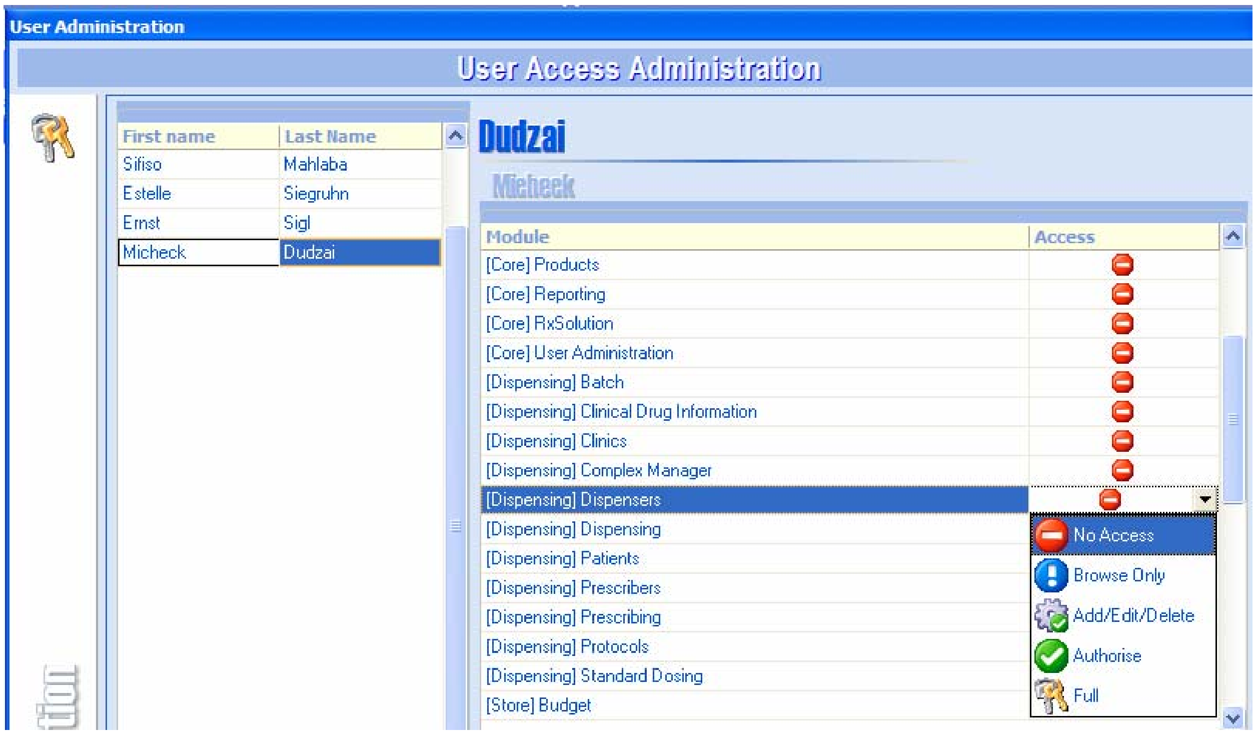
2. The following screen appears—



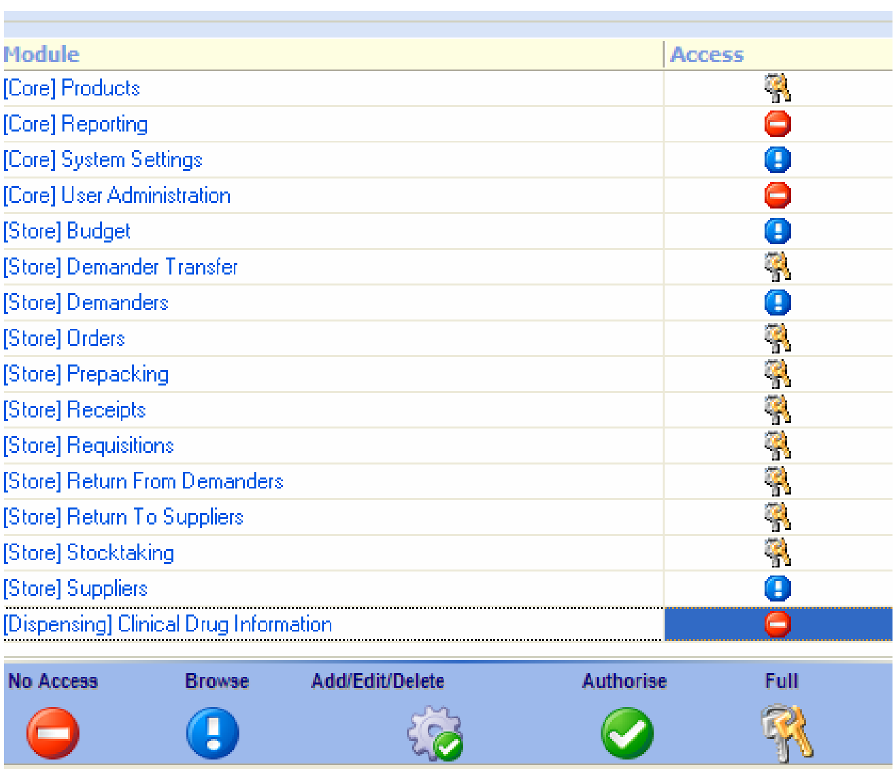
3. To start with, all access is set to "No Access." Click on the **Access** column entry for each module (e.g., **[Core] Products**, and so forth), and choose the level of access for that module for the highlighted user. In the example provided in the screen in step 4, the test user needs full rights for orders.

   The options are **No Access**, **Browse Only**, **Add/Edit/Delete**, **Authorise**, and **Full**. These options are described in Table 2-2.

4. The drop-down list (with levels of access) is displayed. Click on **Full.**



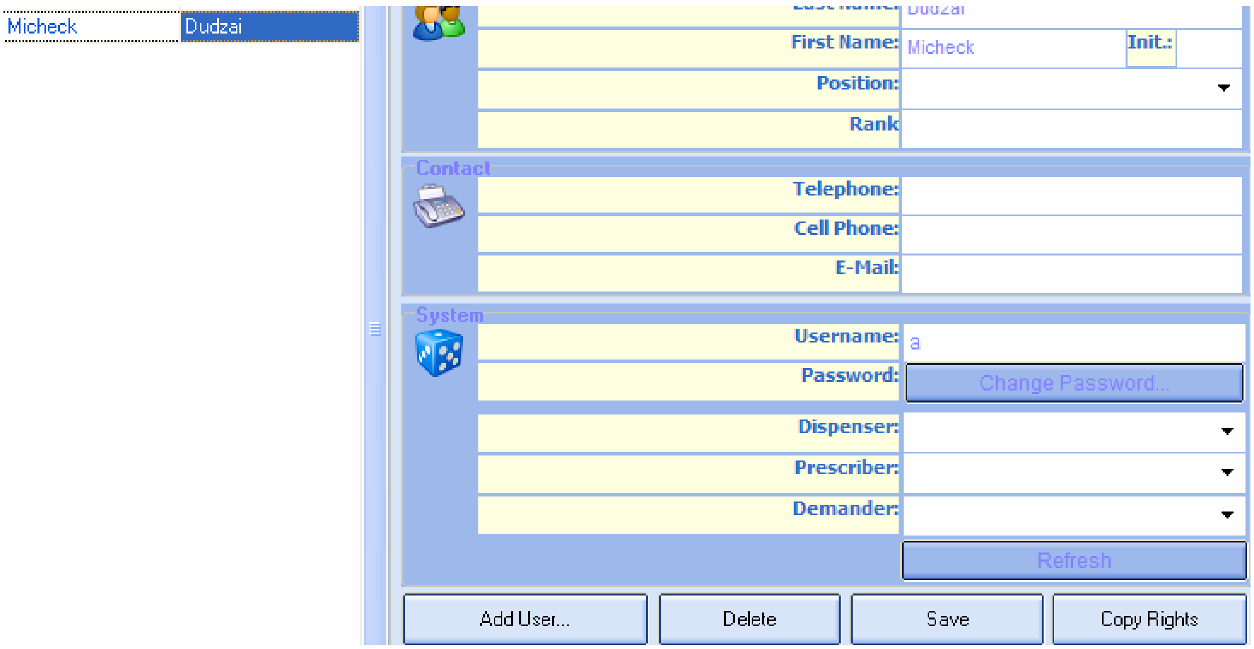
5. An access level must be chosen for each module; access levels may not be left blank. See below for an example.



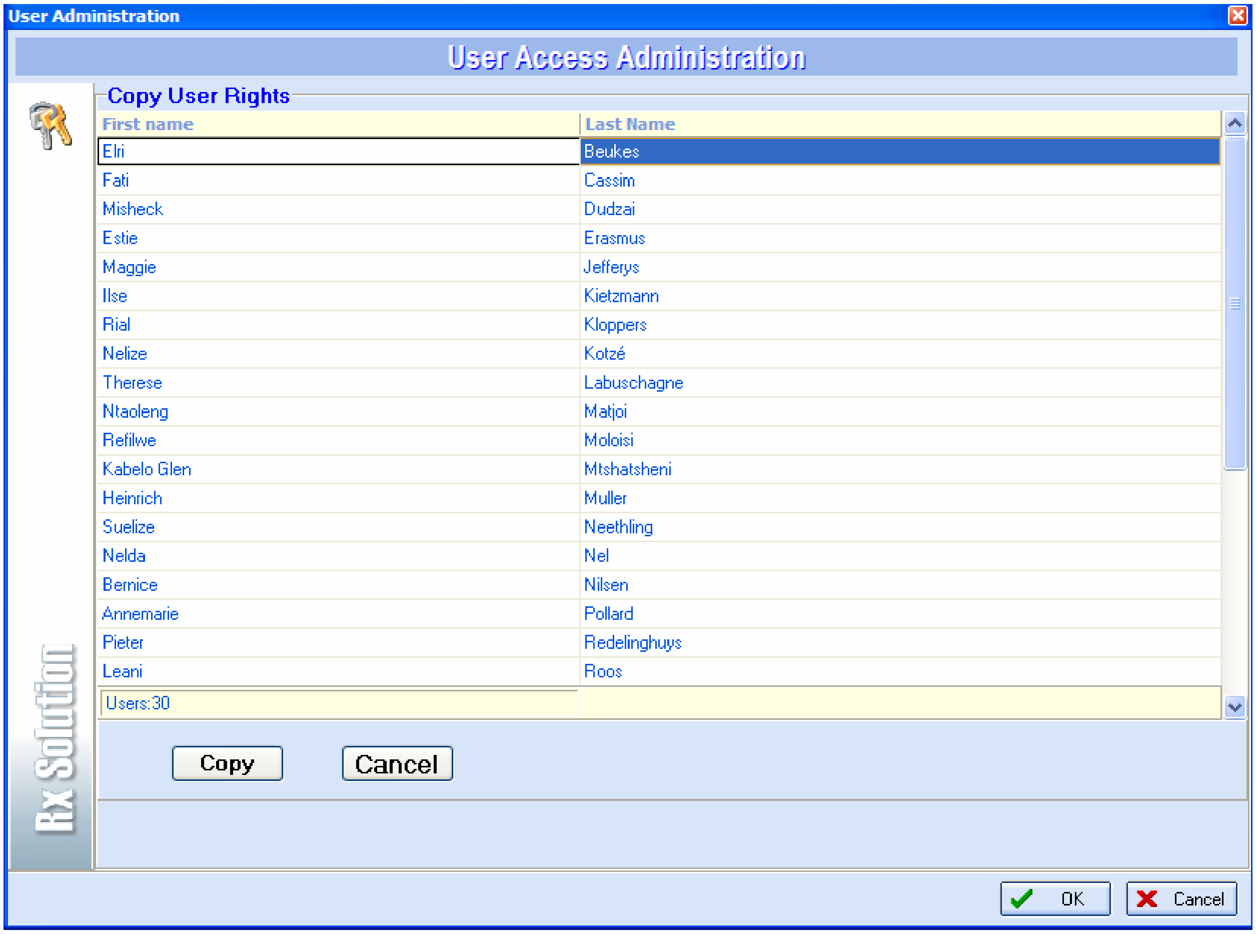
6. Click on **OK** .

Copy an Existing User's Access Rights

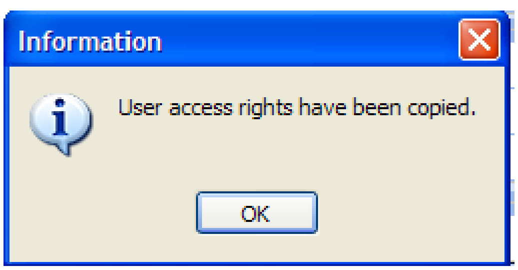
1. Highlight the new user. Click on **Copy Rights**.



2. Click on a user name to select it. This is the user whose user rights you would like to copy.



3. Click on **Copy** and the rights will be copied or Cancel to not continue.



Setting Up the System Access Levels

Table 2-2 describes the different levels of access to RxSolution that are available.

Table 2-2. System Access Levels

Access Level	Description
	The user has absolutely *no* access to the module. This level is normally used to prevent a particular user from working on a certain module.
	The user can only browse, for example, orders, but *cannot* create a new order, delete one, or even open an existing record. This level is normally used in a hospital situation (e.g., if nonpharmacy personnel such as Finance Department staff need to view the transactions but cannot amend or use them in any way).
	In this case, the user is permitted to add, edit, or delete a record (e.g., a receipt).
	This option is applicable only to the Dispensing Module, allowing the posting of a captured prescription.
	This level is used for a user with administration rights. The user has full rights to the module and to RxSolution (e.g., a user with full rights can alter another user's rights).

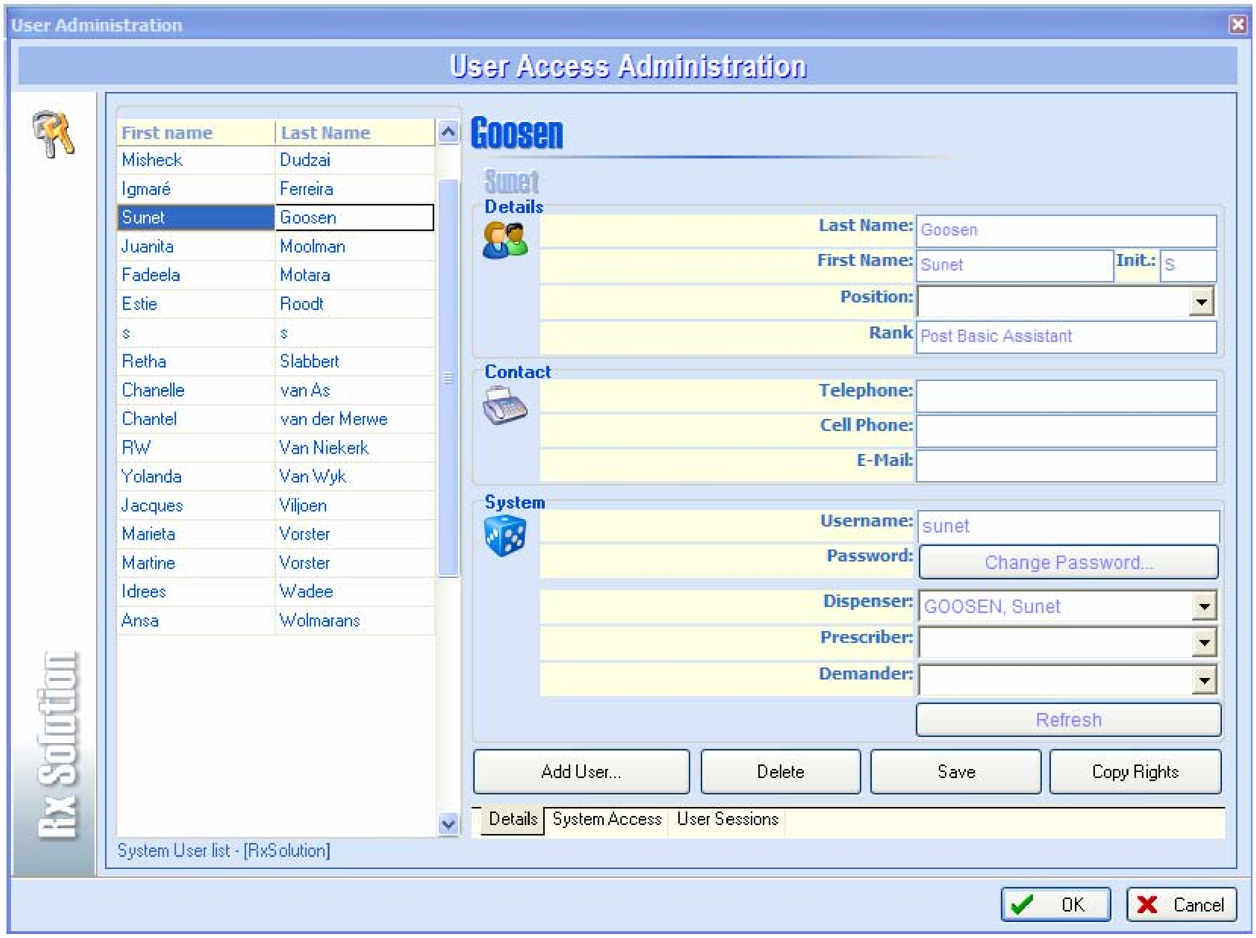
How Do I Delete or Update a User?

> ***Note:*** **A user who has performed a transaction on RxSolution** ***at any time MUST NOT*** **be deleted.**

The following steps can be used to delete a user who has not yet performed a transaction on the system. If the user has performed transactions, the user must not be deleted, but the user's access for all modules can be set to **No Access**.

1. On the **User Access Administration** screen, click on the user who should be deleted.

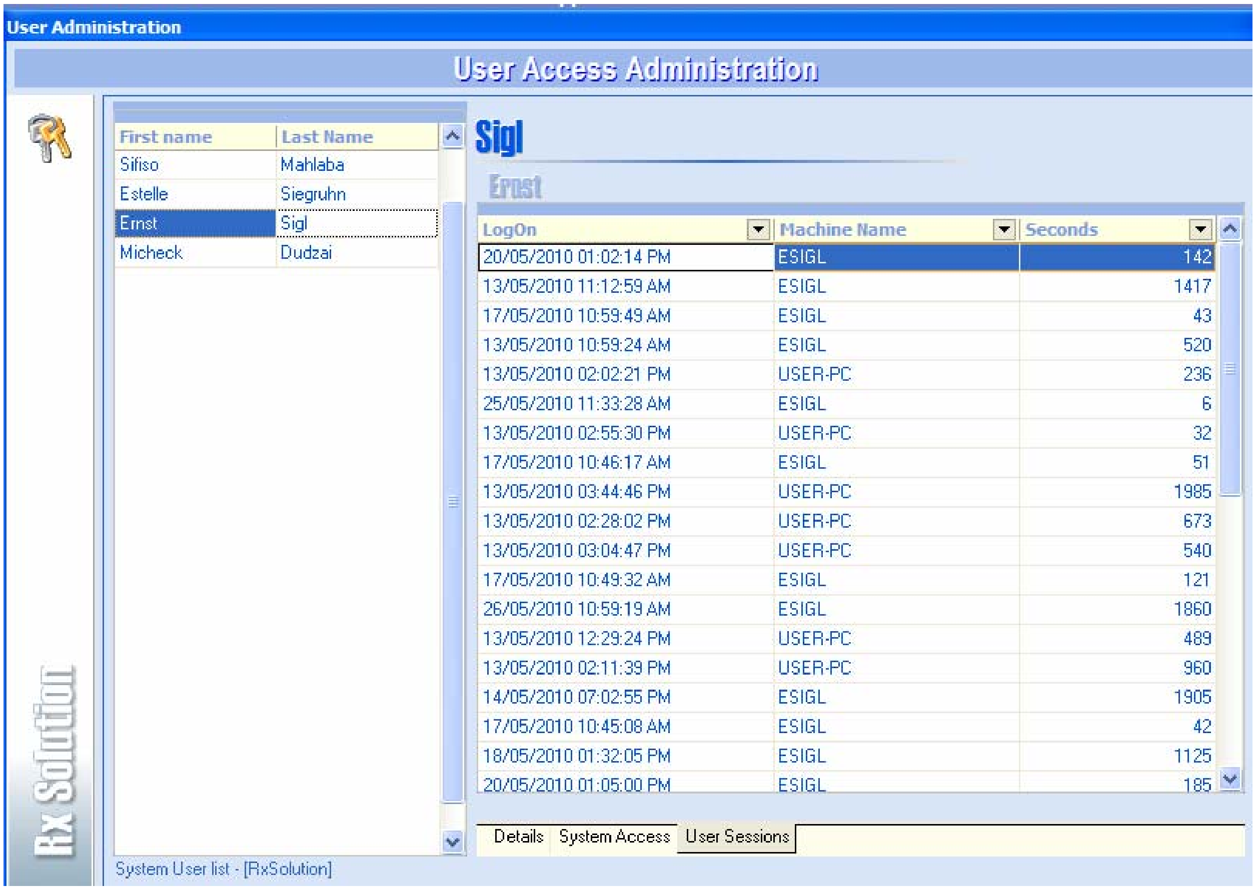
2. Click on **Delete** and then click on **OK**.



How Do I View Past Activities (Sessions) of a User?

1. On the **User Access Administration** screen, click on the **User** and choose **User Sessions**.

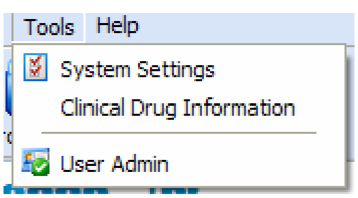
2. The length of the user session will be displayed in the column on the right side of the screen.



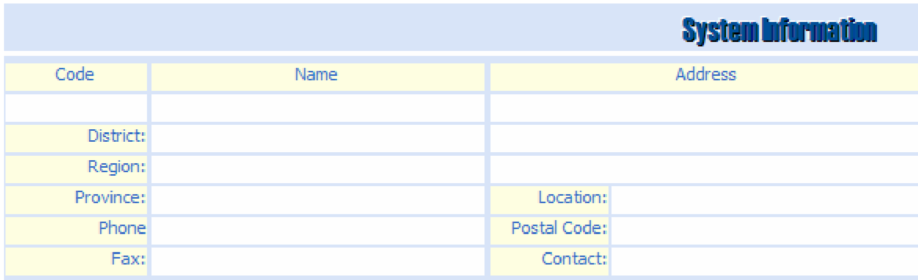
Setting Up the System Information

Details of Your RxSolution Site

1. After logging on, click on **Tools** and choose **System Settings**.



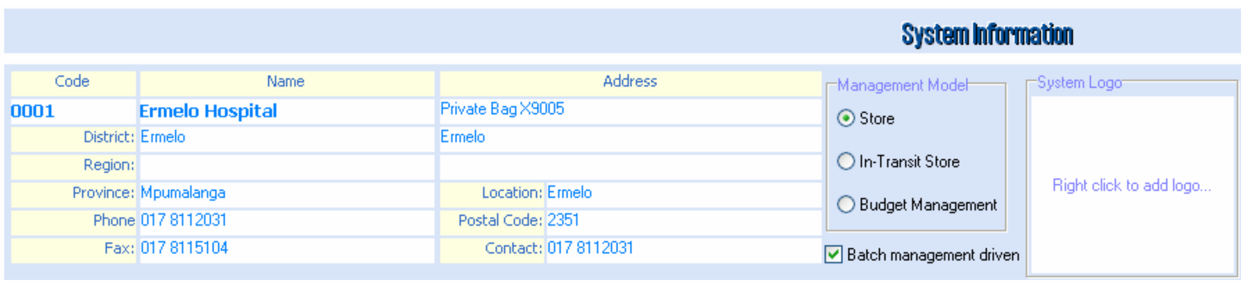
2. The **System Information** screen will appear. Insert the required details in the top left corner of the **System Information** screen (see below).



3. Click on  to save the changes.

Management Model

Also on the **System Information** screen, select the appropriate **Management Model** for your facility in the box to the right of the details of the facility block. Each model is described below.



Store Model

In the store model, the facility or store has its own budget, buys its own stock, and issues to its demanders. A typical pharmacy store is an example of this model. Figure 2-1 provides a schematic of the store model.

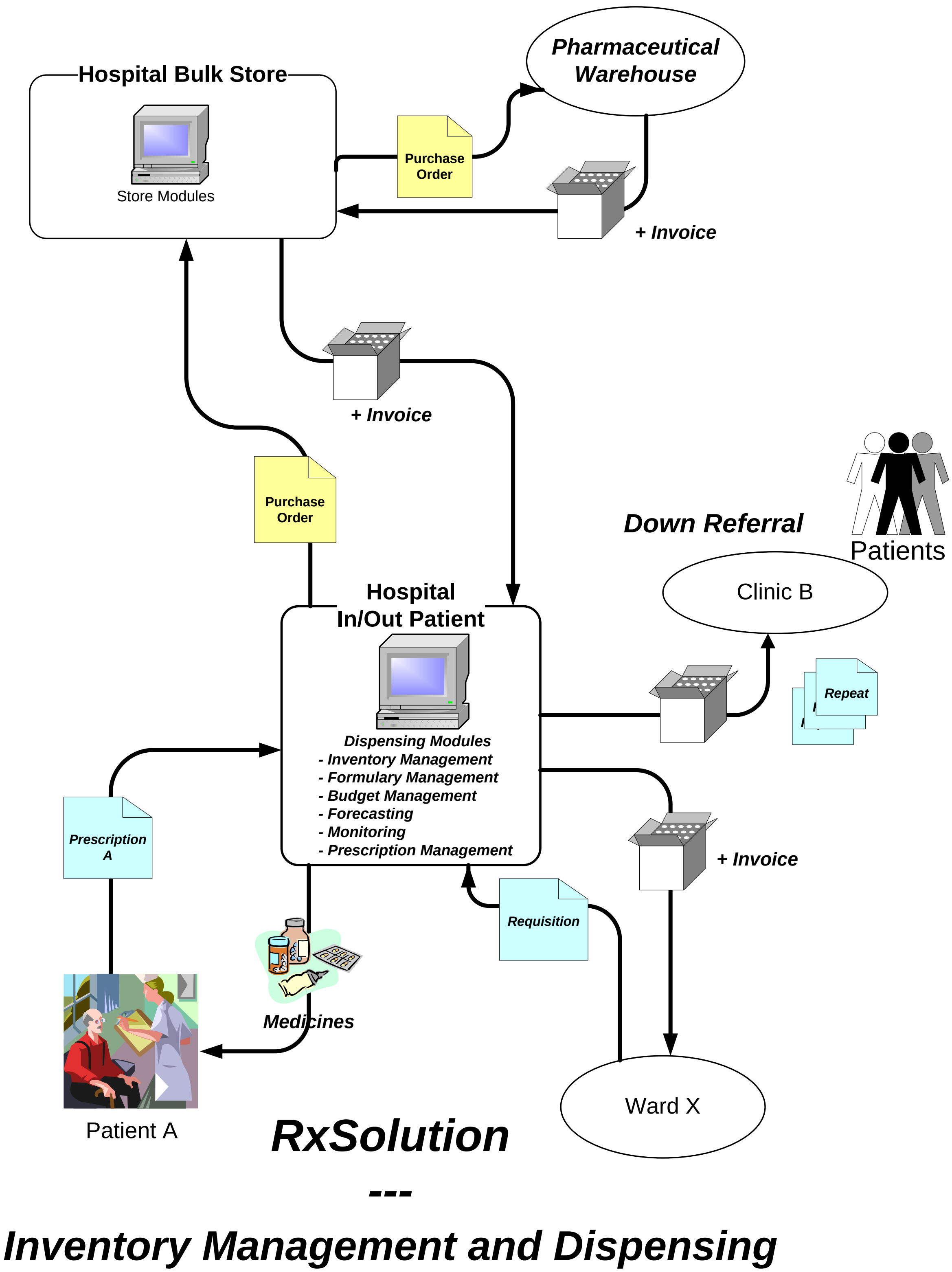


Figure 2-1. Store Management Model

In-Transit Store Model

In the in-transit store model, the store buys on behalf of the demanders only by combining the requisitions into a purchase order, receiving the stock, and reissuing it to the demanders. The facility or store *does not* have its own budget and is expected to keep only what is requisitioned by the demanders. In this model, a purchase order is generated *only* by demander requisitions. Figure 2-2 provides a schematic of the in-transit store model.

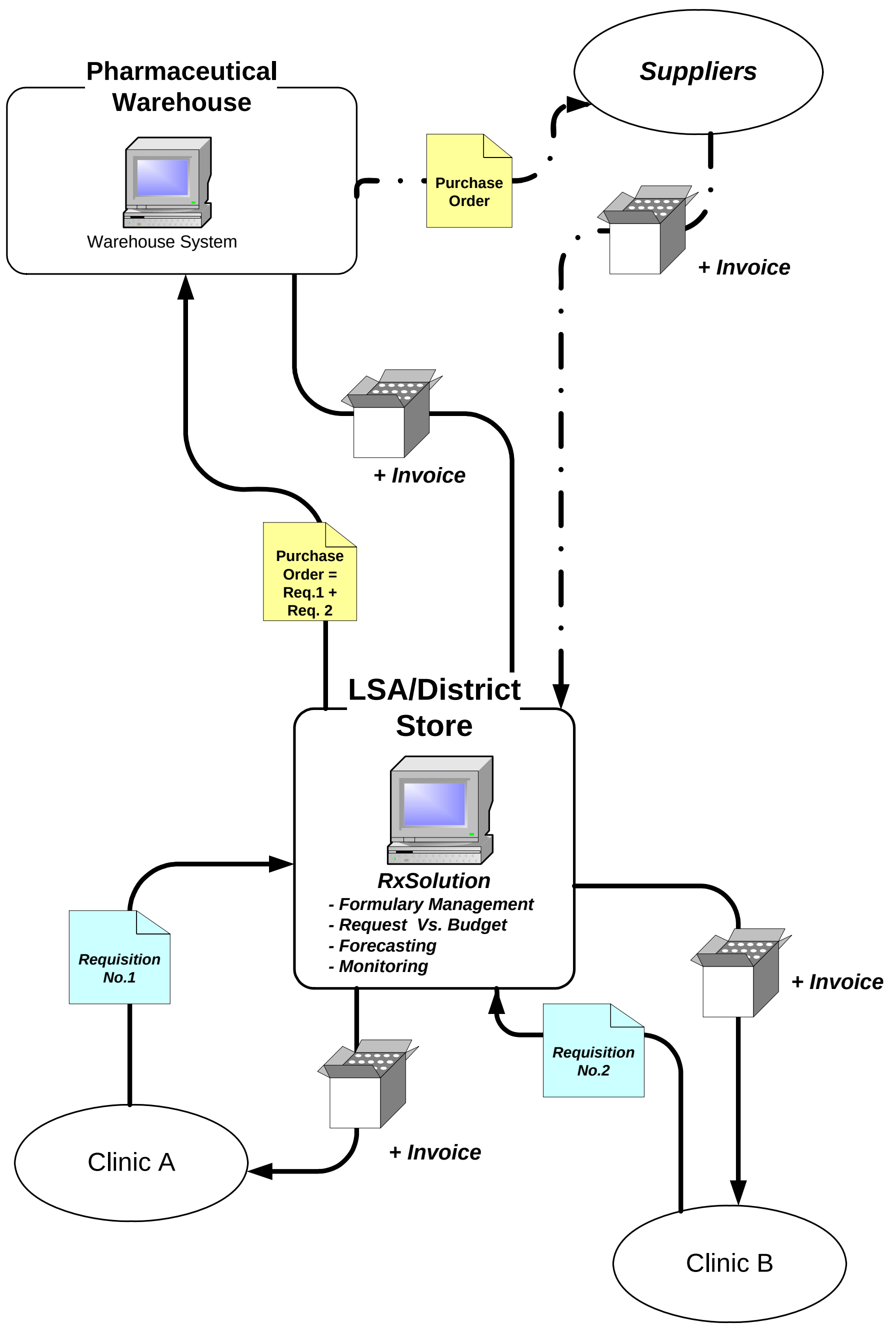


Figure 2-2. In-Transit Store Model

Budget Management Model

The budget management model is used when a store wants only to track what a demander requests and receives but does not use other functions of RxSolution, such as purchase orders. For example, the district pharmacist's only tasks are to receive requisitions from demanders, review them for accuracy and appropriateness, and then pass them along to the district depot to supply the requisitioned items. The district pharmacist needs to monitor what the demanders request and how much they have spent, so he or she enters the requisition in RxSolution. In this model, neither a purchase order nor a receipt can be generated, and these and other unused modules are usually hidden from the user. Figure 2-3 provides a schematic of the budget management model.

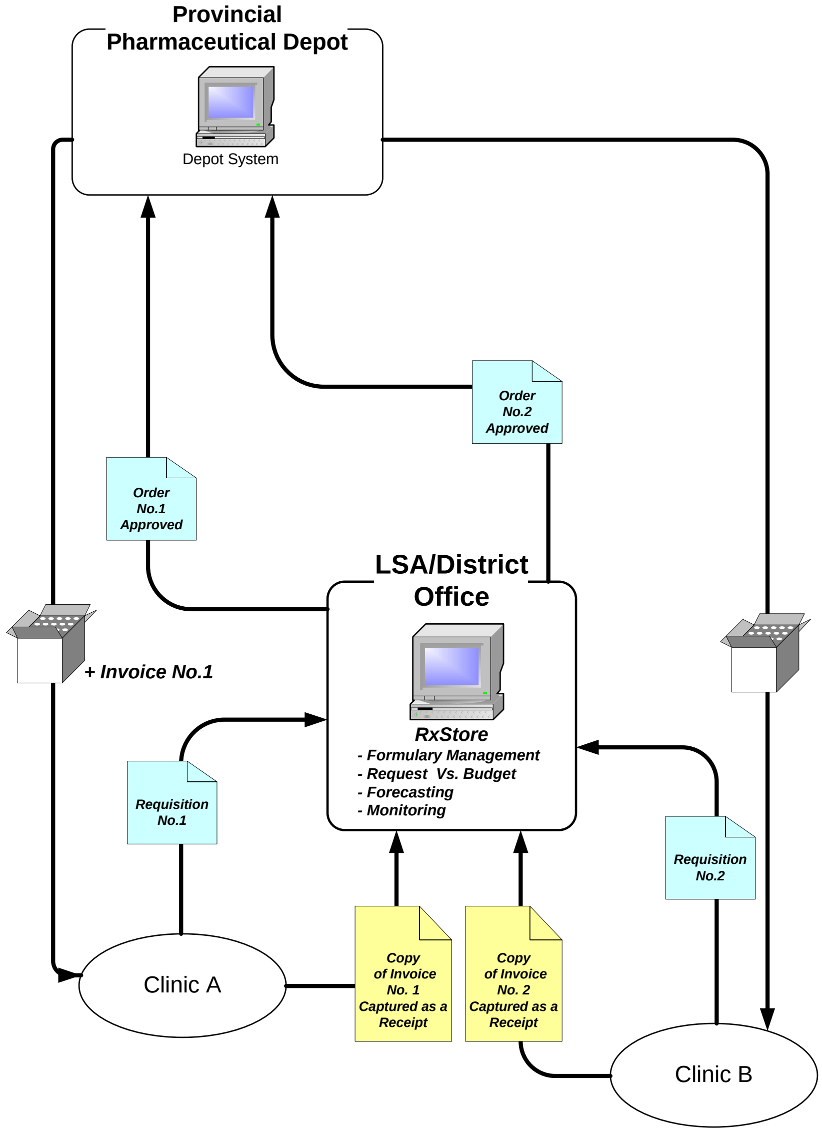
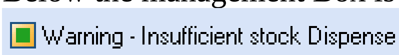


Figure 2-3. Budget Management Model

Below the Management Model box, there is an option called **Batch management driven** 

. Enter a check mark into the **Batch management driven** check box if the institution will receive and issue stock by batch number and expiry date for all products. Either use batch numbers and expiry dates for all transactions or do not use them at all. If certain items do not have batch numbers or expiry dates, you can enter fictitious data for those items. If you do not need to track batch numbers and expiry dates, the option must be left unchecked, and no batch numbers or expiry dates will be saved. If the **Batch management driven** box has a check mark, and the batches have expiry dates, RxSolution will list the batches of an item to issue on a first-to-expire basis.
Below the management Box is a ‘ Warning -Insufficient stock Dispense 

. When Dispensing, and the Demander has no stock available to dispense for an item,, a warning will pop up.

The bottom half of the **System Information** screen (see below) contains 45 tabs that allow the user to tailor the standard content tables for RxSolution to his or her installation site, using local information and terminology. These standard content tables need to be checked at implementation, and any changes need to be captured.

You define default values and drop-down list options in this section of the software, and they are used throughout RxSolution. Entering complete and accurate information in these tabs is crucial for ensuring useful data and reports in the program. The tab options are listed in Table 2-3.

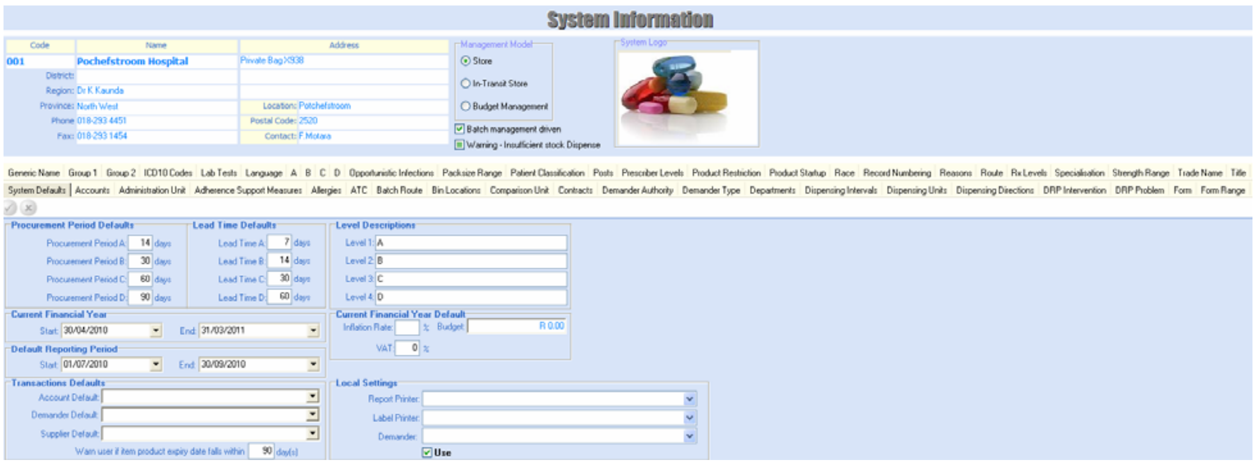
Table 2-3. Tab Options for System Information

TABS	Dispensing Directions	Packsize Range
System Defaults	DRP Intervention	Patient Classification
Accounts	DRP Problem	Posts
Administration Units	Form	Prescriber Levels
Adherence Support Measures	Form Range	Product Registration
Allergies	Generic Name	Product Startup
ATC	Group 1	Race
Batch Route	Group 2	Record Numbering
Bin Locations	ICD10 Codes	Reasons
Comparison Unit	Lab Tests	Route
Contracts	Language	Rx Levels
Demander Authority	Level 1	Specialisation
Demander Type	Level 2	Strength Range
Departments	Level 3	Trade Name
Dispensing Intervals	Level 4	Title
Dispensing Units	Opportunistic Infections	

Most of the tabs are self-explanatory, but the particularly important or complex ones are described below.

System Defaults Tab

1. Click on **System Defaults** and the following screen appears—



The defaults defined here are used in various formulas in the software (e.g., reorder quantities and reports). The procurement period and lead time defaults should be set thoughtfully, because they help determine reorder quantities for items. Each item in the program will be assigned a procurement period and lead time of A, B, C, or D, the value of which is defined here.

- **Procurement Period Defaults**: This option describes at what interval orders for an item are normally placed. The procurement period is the number of days between two orders.

- **Lead Time Defaults**: This option describes the typical lead time for an item. The lead time is the number of days between the placing of a requisition to the bulk store and the receipt of the items on that requisition.

- **Level Descriptions**: The four main levels of the user's health system can be recorded here.

- **Current Financial Year**, **Current Financial Year Default**, and **Default Reporting Period**: These are self-explanatory and are used for reporting and tracking purposes.

- Enter a logo that can be used in various reports by right-clicking in the box below **System Logo** at the top of the screen and then clicking "Load." Please attach Bitmap file of the required logo and save.

- Default printers are setup so that the reports will be printed to the correct printer, be it A4 or labels.

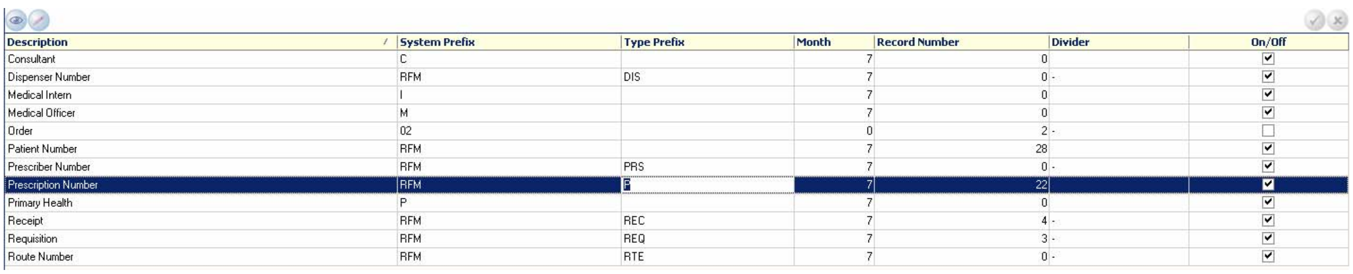
- Enter the default dispensing demander in **Transaction Defaults→Demander Default** if you use the dispensing features. This information is stored for the specific computer at the specific demander site where the computer is located.

- Enter the number of days within which the program will warn the user if the stock will expire within the date range when receiving stock from suppliers.

2. Type or choose the applicable value or default in each category, and click on **Done** to save the changes.

Record Numbering Tab

Click on **Record Numbering** and type the three-letter prefix, a preferred short name, or abbreviation of your facility (e.g., "FRE" for Frere Hospital), in the **System Prefix** column. Use the same prefix for all requisitions, orders, and receipts. This prefix will appear on your requisition, order, and receipt numbers. Use the **Type Prefix** column to describe the type of transaction (e.g., receipt, requisition, and so forth). Click on **Done** to save the changes before exiting the screen by clicking **Close**.



Description	System Prefix	Type Prefix	Month	Record Number	Divider	On/Off
Consultant	C		7	0		✓
Dispenser Number	RFM	DIS	7	0	-	✓
Medical Intern	I		7	0		✓
Medical Officer	M		7	0		✓
Order	02		0	2	-	
Patient Number	RFM		7	28		✓
Prescriber Number	RFM	PRS	7	0	-	✓
Prescription Number	RFM	P	7	22		✓
Primary Health	P		7	0		✓
Receipt	RFM	REC	7	4	-	✓
Requisition	RFM	REQ	7	3	-	✓
Route Number	RFM	RTE	7	0	-	✓

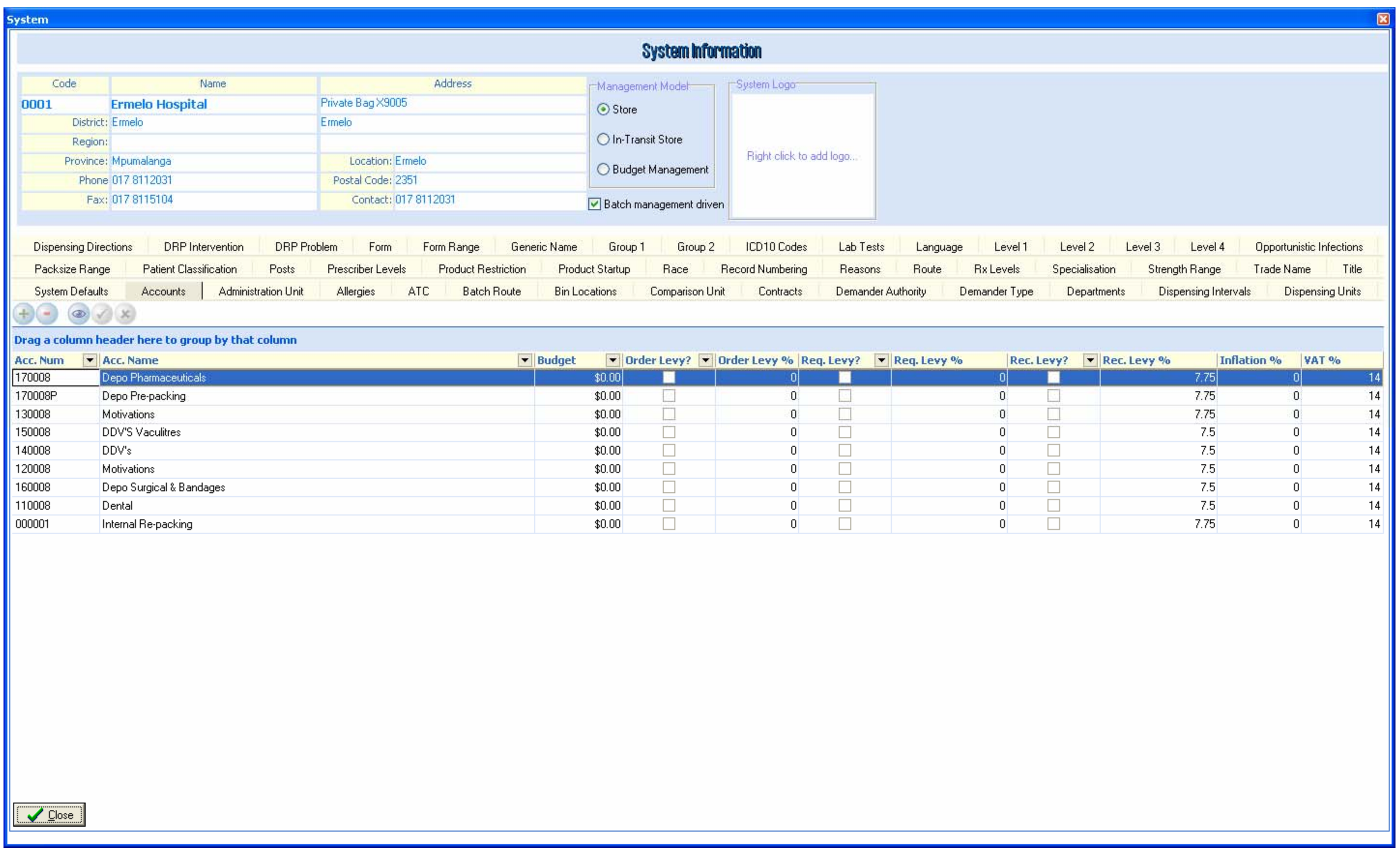
If the **On/Off** box does not have a check mark, it will prevent the list number from defaulting to 00001 at a new month. If all of the different procedures are not displayed here, see ***How Do I Ensure That All Procedures Have List Numbering?*** later in this chapter.

Accounts Tab

Click on **Accounts** and fill in the necessary details (e.g., **Acc. Name**, **Acc. Number**, and **Budget**). Remember to check the three small boxes for levies (order, requisition, and receipts) if your pack costs do not include these charges. Type the percentage charged for each levy, including inflation and value-added tax rate (VAT) where applicable.

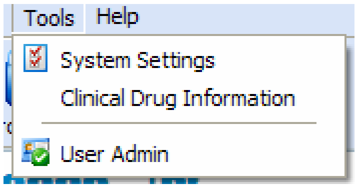
Explanation on VAT Percentage:

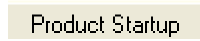
- Receive stock EXCLUDING VAT ; If stock is received where the price is excluding VAT, then enter the VAT rate of the country to charge your clients VAT.
- Receive stock INCLUDING VAT ; If stock is received where the price is including VAT, then enter a ‘0’ (Zero) for the VAT rate to prevent double charging of VAT on Requisitions.



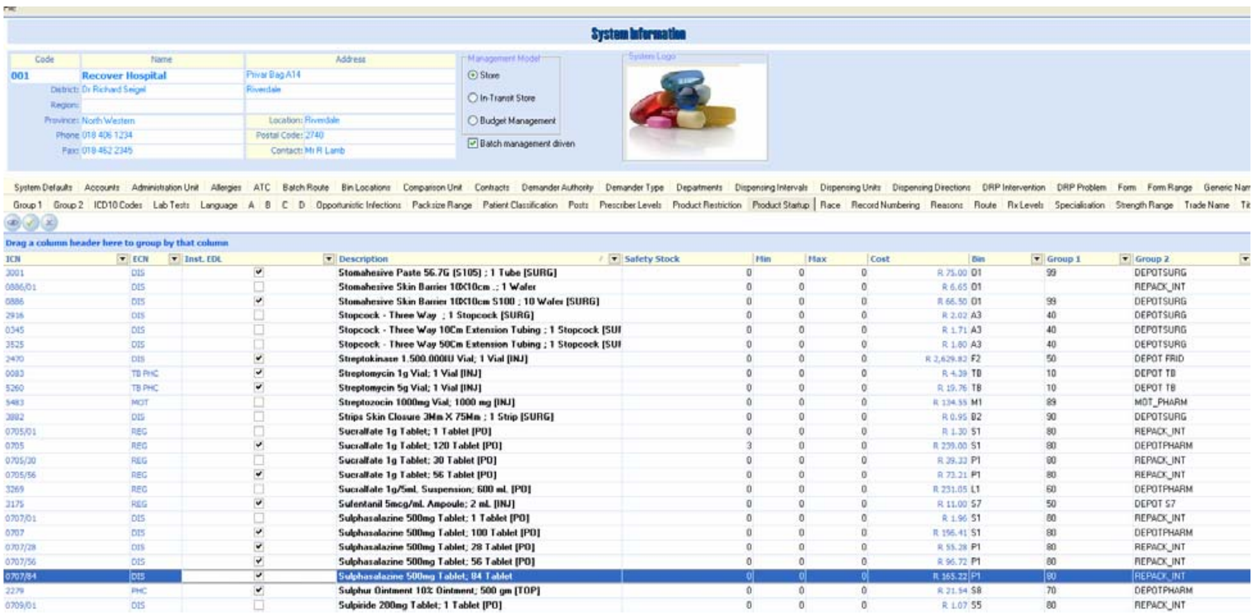
How Do I activate My Initial Product Catalogue from default items on the system ?

1. After logging on, click on **Tools** and choose **System Settings**.



2. Click on the **Product Startup** tab 

to display a product catalogue.



3. Choose the product and place a check mark in the **Inst. EDL** box 

to denote whether to include this item on your RxSolution product list. All items on your institutional essential drugs list (Inst. EDL) should be included.

4. Type your stock levels for **Safety Stock**, **Min**, and **Max** based on your issue history. Also enter cost information, default Bin Location and Groups information.

5. Click on  (on the left above the list) to save your institutional EDL changes.

6. Continue this process until all the required products have been activated to Institutional level.

7. Click the **Close** button to exit this screen, then log off and exit RxSolution.

8. Upon restarting RxSolution, the items you have selected with the check mark will appear on the products list, along with the captured stock levels.

How do IEnter initial Stock on hand Quantities?

See Chapter 5, Stock Taking.

How Do I Ensure that All Procedures Have List Numbering?

1. Consult a database administrator.
2. The database administrator needs to update the following table: *tblSystemRecordNumbering*.
3. Below is a setup of the fields and values that need to be in place.

recordNumber_ID	demanderStore...	Record_Number	Record_Month	Record_Year	Record_StorePre	Record_DateSet	Record_Type	Record_TypeID	Record_Divider	Record_GeneralDesc...	Record_bol	SystemStore_ID	RecordListID
e42024ba-e0c0-...	1	1	1	2005	PR	25/05/1958 00:...	*NULL*	3	-	Prescriber Number	True	*NULL*	1
e52024ba-e0c0-...	1	1	1	2010	P	25/05/1958 00:...	*NULL*	2	*NULL*	Patient Number	True	*NULL*	2
e62024ba-e0c0-...	1	1	1	2005	D	25/05/1958 00:...	*NULL*	1	-	Dispenser Number	True	*NULL*	3
e72024ba-e0c0-...	1	1	1	2010	F	25/05/1958 00:...	P	4	*NULL*	Prescription Number	True	*NULL*	4
49352f4e-880b-...	1	1	1	2005	RT	25/05/1958 00:...	RTE	5	-	Route Number	True	*NULL*	5
bcbc4054-29b5-...	1	1	1	2005	C	25/05/1958 00:...	*NULL*	6	*NULL*	Consultant	True	*NULL*	6
a15b4819-664c-...	1	1	1	2005	M	25/05/1958 00:...	*NULL*	7	*NULL*	Medical Officer	True	*NULL*	7
2dca99a9-2d07-...	1	1	1	2005	MI	25/05/1958 00:...	*NULL*	8	*NULL*	Medical Intern	True	*NULL*	8
1cf55797-0f8b-...	1	1	1	2005	P	25/05/1958 00:...	*NULL*	9	*NULL*	Primary Health	True	*NULL*	9
6b3ef438-8f57-...	1	1	1	2011	BNR	26/01/2011 17:...	REC	5	-	Receipt	True	1	10
477307df-0c17-...	1	1	1	2011	BNR	26/01/2011 17:...	ORD	4	-	Order	True	1	11
2029f8c4-1631-...	1	1	1	2011	BNR	26/01/2011 17:...	REQ	3	-	Requisition	True	1	12
07c634bb-f112-...	1	3	1	2011	BNR	26/01/2011 17:...	STK	10	-	Stocktake	True	1	13
4932f668-cf41-...	1	1	1	2011	BNR	26/01/2011 17:...	RFD	23	-	Return from Demander	True	1	14
0fbdc46e-b08f-...	1	1	1	2011	BNR	26/01/2011 17:...	RTS	16	-	Return To Supplier	True	1	15
80a79eaf-55ce-...	1	2	1	2011	BNR	26/01/2011 17:...	DT	28	-	Demander Transfer	True	1	16
3c8049ba-51d0-...	1	1	1	2011	BNR	26/01/2011 17:...	PRP	26	-	Pre-Packing	True	1	17
b6d2deaa-cc16-...	1	1	1	2010	BNR	25/05/1958 00:...	QUO	29	-	Quotations	True	1	18
df2d7ac9-9416-...	1	1	1	2009	BNR	25/05/1958 00:...	TKT	44	-	Ticket Number	True	1	19