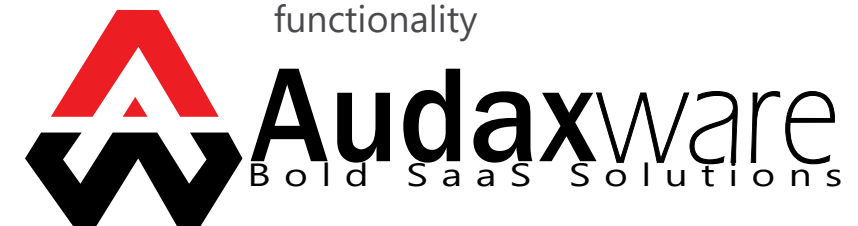


Getting Started

Admin Guide



Version 1.4: This software guide is intended as a general overview of functionality. In the fourth quarter of 2015, this guide will be transitioned from this format to training videos which will be accessible from the software interface. This will allow Audaxware to keep user apprised of new features and functionality



The Administrator Role

The administrator role has all of the capabilities as the planner as well as the following:

Custom Equipment Database Management: Audaxware users have access to Audaxware equipment. While equipment is continually added to the database, a user may elect to customize equipment or add equipment which is not shared with the Audaxware community. There are two types of equipment in the Custom database:

1. If any data is editing in the Audaxware database, the user will prompted the statement below. If the user



The equipment you are changing resides in the global Audaxware database. Changing this equipment will create a custom version in your customized equipment database. Are you sure you want to continue?

OK

Cancel



selects "OK", the equipment will be copied to the custom database and the suffix "C" will be added to the code indicating the equipment is a customized version of Audaxware equipment

2. Equipment can be added directly to the custom equipment database simply by selecting the add equipment icon. Reference the following page regarding adding equipment.

The Administrator Role Cont'd

Adding Custom Equipment: When adding equipment, all information is entered by the administrator with the exception of the equipment Code. The equipment code is autogenerated based on the category selection. Administrator can also upload equipment specifications, photo, CAD and Revit files. Audaxware encourages all administrators to communicate equipment needs prior to adding custom equipment as there are benefits to having Audaxware add equipment to the global database.

After adding the equipment detail and infrastructure information. The administrator is able to review recent purchases by the client in the Vendors tab as well as add equipment option and color selections.

Equipment Detail  

Code: <input type="text" value="CRT0191"/>	<input type="checkbox"/> Discont.	
Description: <input type="text" value="Case Cart, Single Shelf"/>	Resp: <input type="text" value="OFOI"/>	
Category: <input type="text" value="Cart - Case"/>	Placement: <input type="text" value="Floor"/>	
Manufacturer: <input type="text" value="Suburban Surgical Company"/>	Useful Life(yrs): <input type="text"/>	
Model #: <input type="text" value="105602-00"/>	Model Name: <input type="text" value="Regal"/>	
Comment: <input type="text" value="Double door, two 5\"/>		
<input type="checkbox"/> ASE <input type="checkbox"/> ADA <input type="checkbox"/> Seismic <input type="checkbox"/> Antimicrobial <input type="checkbox"/> Eco-Label		
Weight: <input type="text"/>	Loaded Weight: <input type="text"/>	Ship Weight: <input type="text"/>
Height(in): <input type="text" value="39.38"/>	Width(in): <input type="text" value="41.75"/>	Depth(in): <input type="text" value="27.38"/>
Clearance: Front: <input type="text"/>	Left: <input type="text"/>	Top: <input type="text"/>
Back: <input type="text"/>	Right: <input type="text"/>	Bottom: <input type="text"/>
Unit of Measure: <input type="text" value="ea."/>	Last Budget Update: 03/25/2015	
Min \$: <input type="text" value="2600.00"/>	Max \$: <input type="text" value="3000.00"/>	Avg/Last \$: 2800.00/
Downloads: Cutsheet CAD Block Photo Revit		

Infrastructure Vendors Options Colors

-- Exhaust

CFM

BTUs

-- Plumbing

☐ Hot Water ☐ Cold Water ☐ Drain ☐ Relief

☐ Treated Water ☐ Chilled Water ☐ Return

-- Gases

☐ Oxygen ☐ Nitrogen ☐ MedAir ☐ N₂O

☐ Vacuum ☐ WAG ☐ CO₂ ☐ Comp Air

☐ Steam ☐ NatGas

-- Data

-- Electrical

Volts

-- Phases

-- Hertz

Amps

VoltAmps

Watts

Yes Mobile

-- Blocking

The Administrator Role Cont'd

In addition to the custom database management, the administrator role also has the following capabilities:

Equipment Workspace Reports: View which projects selected equipment is located. The report is useful when managing equipment database and selectively notifying planners of equipment modifications that effect their project(s).

All Project Access: Regardless of who created the project, the client administrator can view, open, and edit all projects associated with the client's domain.

User Management: Add, edit, and delete Audaxware users.

Roles:

☐ Administrator ☐ AEC ☐ Owner ☐ Planner

Projects:

Main Info:

Active User: ☒

First Name:

Last Name:

Email:

Comment:

Add User

Reset

[Home](#)

[Projects ▼](#)

[Equipment ▼](#)

[Admin ▼](#)

[Contact Us](#)

Billing

August ▼

2015 ▼

Search

Users Count: 5

Monthly Total:

Getting Started

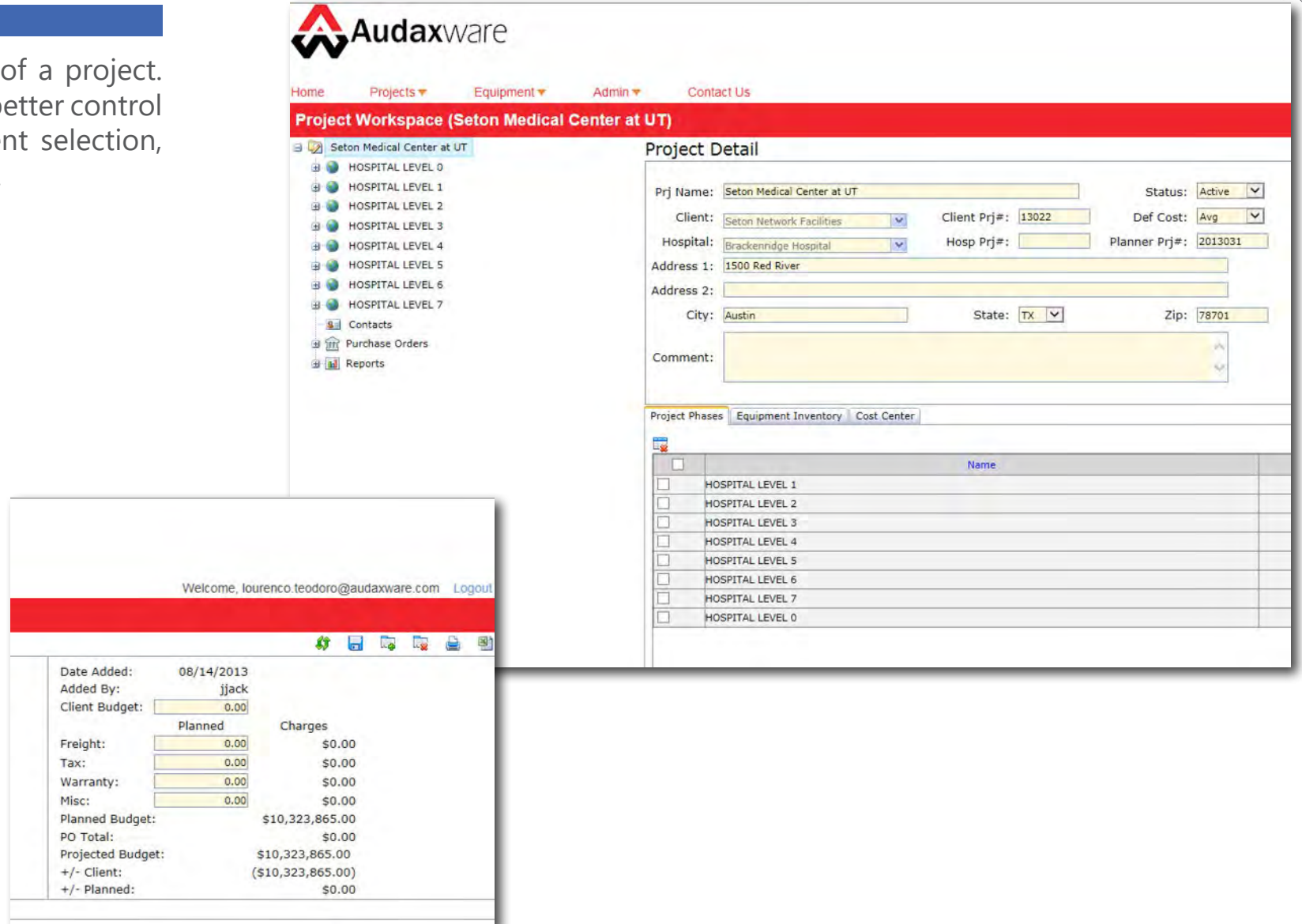
Planner Guide



Version 1.5: This software guide is intended as a general overview of functionality. In 2016, this guide will be transitioned from this format to training videos which will be accessible from a new software interface. This will allow Audaxware to keep user apprised of new features and functionality

The Planner Role

The planners role involves managing all aspects of a project. Empowered with Audaxware, planners are able to better control and monitor the structure of a project, equipment selection, budgeting, reporting, and procurement processes.



Audaxware

Home Projects Equipment Admin Contact Us

Project Workspace (Seton Medical Center at UT)

Project Detail

Prj Name: Seton Medical Center at UT Status: Active

Client: Seton Network Facilities Client Prj#: 13022 Def Cost: Avg

Hospital: Brackenridge Hospital Hosp Prj#: Planner Prj#: 2013031

Address 1: 1500 Red River

Address 2:

City: Austin State: TX Zip: 78701

Comment:

Project Phases Equipment Inventory Cost Center

	Name
<input type="checkbox"/>	HOSPITAL LEVEL 1
<input type="checkbox"/>	HOSPITAL LEVEL 2
<input type="checkbox"/>	HOSPITAL LEVEL 3
<input type="checkbox"/>	HOSPITAL LEVEL 4
<input type="checkbox"/>	HOSPITAL LEVEL 5
<input type="checkbox"/>	HOSPITAL LEVEL 6
<input type="checkbox"/>	HOSPITAL LEVEL 7
<input type="checkbox"/>	HOSPITAL LEVEL 0

Welcome, lourenco.teodoro@audaxware.com Logout

Date Added:	08/14/2013
Added By:	jjack
Client Budget:	0.00
	Planned Charges
Freight:	0.00 \$0.00
Tax:	0.00 \$0.00
Warranty:	0.00 \$0.00
Misc:	0.00 \$0.00
Planned Budget:	\$10,323,865.00
PO Total:	\$0.00
Projected Budget:	\$10,323,865.00
+/- Client:	(\$10,323,865.00)
+/- Planned:	\$0.00

SYSTEM REQUIREMENTS

Audaxware is intended to function on Internet Explorer (version 10+) and Firefox (version 32+). While the system can be viewed on other browsers; all of the features may not be functional.

Audaxware is working to add compatibility to other browsers and will advise all users when additional compatibility has been added and tested.



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ICONS & TERMINOLOGY

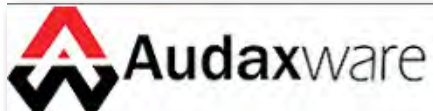
[Common Icons](#)

[Terminology](#)

On the main menu, select Project > New Project. A virtual modal will appear and prompt the planner to enter initial project information. This information can be updated at anytime as the project progresses.

PROJECT STATUS: Defaults to active; other selections include: Complete, Pending, and Training. Training is intended for planners interested in becoming familiar with the system. Training projects will not impact the purchasing history in the equipment database.

DEFAULT COST: Select the default budget parameter for equipment added to the project. For example, planners working on a project in the early conceptual stage may elect to use the high range as the project is not well defined and equipment selection is based on little or no stakeholder interaction.



Home Projects Equipment Admin Contact Us

Welcome!

Status: Active

Seton Medical C

- Open Project
- New Project**
- Global Contacts
- Department Types
- Room Template Workspace
- Dashboard

Add Project

Project Name:

Status: Active

Client: -- Select or Enter New -- **Project No.:**

Facility: -- Select or Enter New -- **Def Cost:** Avg

Address 1:

Address 2:

City: **State:** **Zip:**

Comment:

CREATING A NEW PROJECT (Cont'd)

The project detail contains general project information fields. The Planner will enter the project budget established by the customer as well as any budgets for freight, tax, warranty, and misc or contingency monies for the project. This information will be used to calculate project projected cost deltas in the Budget Summary Report as well as in the user interface.

At any point during the project, the planner can update information in the project detail.

Project Detail

Prj Name: Brackenridge Capital Planning

Status: Active

Client: Seton Network Facilities

Project No.:

Def Cost: Avg

Facility: Brackenridge Hospital

Project No.:

Address 1:

Address 2:

City: Austin

State: TX

Zip: 78701

Comment:

Date Added: 04/24/2014

Added By: dkromis@hsginc.org

Client Budget: 0.00

	Planned	Charges
Freight:	0.00	\$0.00
Tax:	0.00	\$0.00
Warranty:	0.00	\$0.00
Misc:	0.00	\$0.00
Planned Budget:		\$24,654,055.00
PO Total:		\$3,468,396.59
Projected Cost:		\$24,681,438.00
Client Budget Delta:		(\$24,681,438.00)
Planned Budget Delta:		(\$27,383.48)

Project Phases

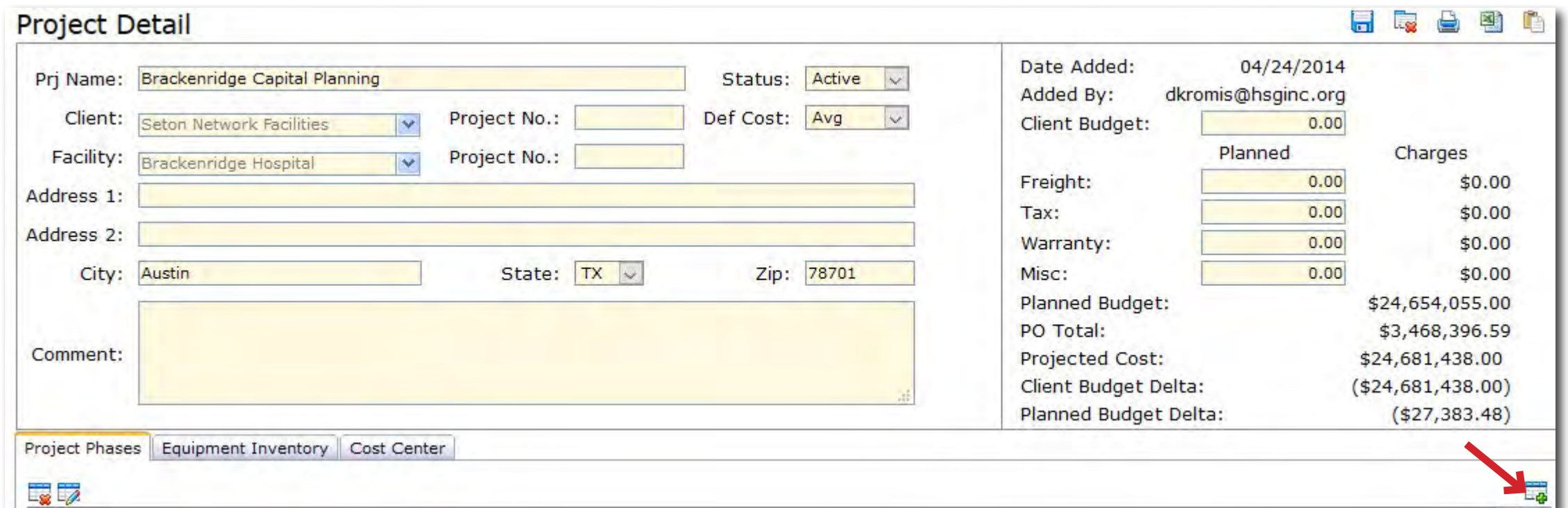
Equipment Inventory

Cost Center

STARTING A PROJECT: PROJECT HIERARCHY

A project has three levels of hierarchy that must be defined by the planner. The structure can be edited at any time during the project life cycle.

PROJECT PHASES(s): Project phases are time based components of a project. A project must have at least one phase; however, a complex project can have an unlimited phases if so desired. To add a phase the planner simply clicks on the 'Add Phase' button in the Project Phases tab.



Project Detail

Prj Name: Status:

Client: Project No.: Def Cost:

Facility: Project No.:

Address 1:

Address 2:


City: State: Zip:

Comment:

Date Added: 04/24/2014
Added By: dkromis@hsginc.org
Client Budget:

	Planned	Charges
Freight:	<input type="text" value="0.00"/>	\$0.00
Tax:	<input type="text" value="0.00"/>	\$0.00
Warranty:	<input type="text" value="0.00"/>	\$0.00
Misc:	<input type="text" value="0.00"/>	\$0.00
Planned Budget:		\$24,654,055.00
PO Total:		\$3,468,396.59
Projected Cost:		\$24,681,438.00
Client Budget Delta:		(\$24,681,438.00)
Planned Budget Delta:		(\$27,383.48)

Project Phases



STARTING A PROJECT: PROJECT HIERARCHY (Cont'd)



PROJECT PHASE(s): Project phases require data entry in the Description, Start and End dates. The description is the name that will appear in the tree view. The other data referenced in the 'Add Phase' dialogue is not required but is useful when managing the project.



The data entered for the Project Phase can be edited at any time during the course of the project. Remember to save the information entered before exiting. After saving, the new Project Phase will appear in the tree view.




Add Phase

Description:

Start Date:  **End Date:** 

Equip Date:  **Go Live Date:** 

OFCI Delivery: 

Comments:

Save **Close**

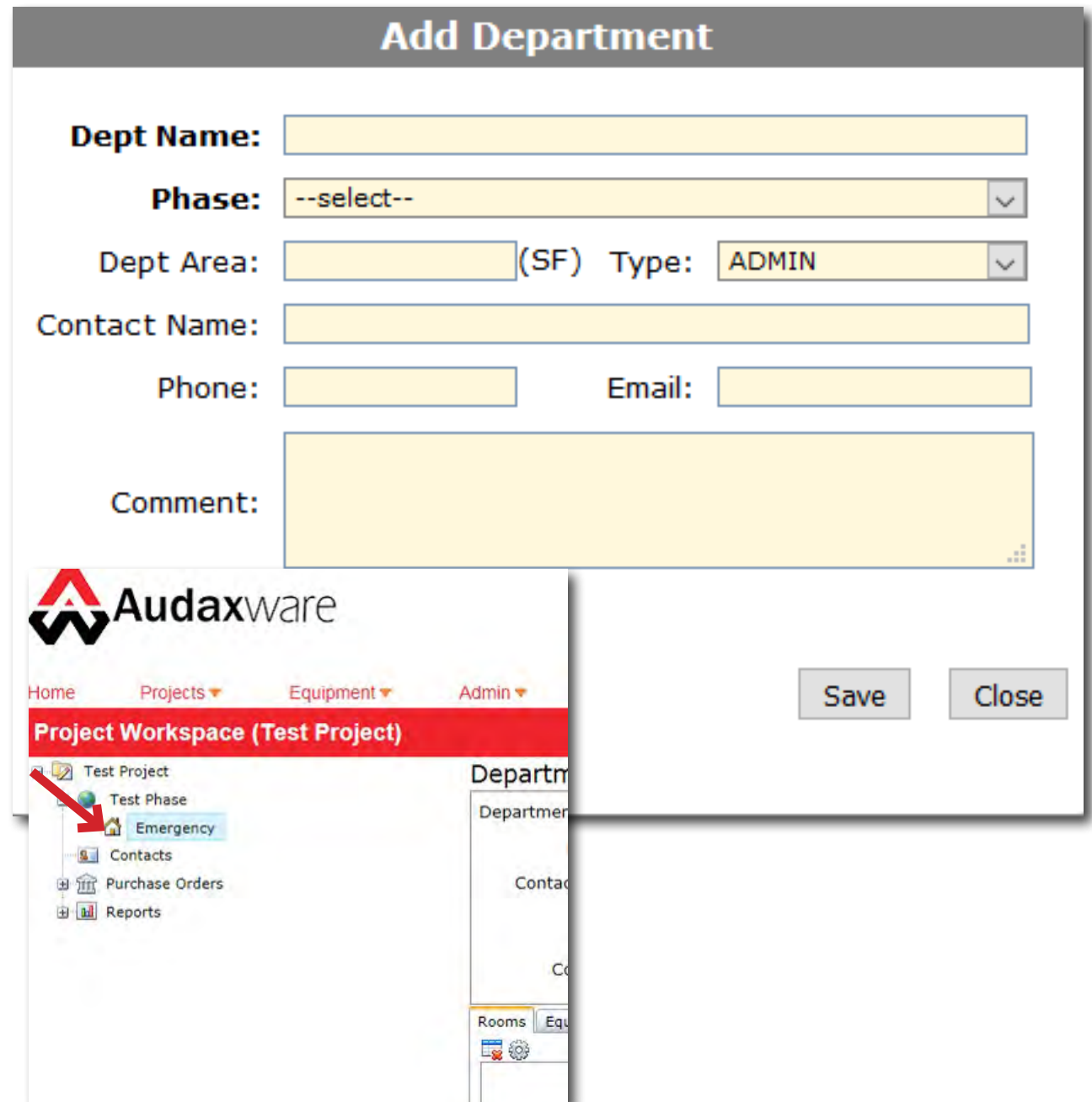
STARTING A PROJECT: PROJECT HIERARCHY (Cont'd)

DEPARTMENT(s): Departments are added in the same manner as phases, there is no limit to the quantity of departments or phases. Click the 'Add Department' button in the Department tab. The planner will be prompted for department information; the department Name, type and phase is required.

DEPARTMENT TYPES: Department types create uniformity across projects (i.e. facilities may refer to the same department with different names: ER, ED, Emergency). **IMPORTANT:** The department Type 'MIS' should only be used for those areas where MIS equipment resides for the purposes of IS infrastructure. This topic will be discussed more in regards to connecting equipment.

In a project with multiple phases, the Planner is able to add departments into any phase of the project without leaving the screen.

The data entered for the Department can be edited at any time during the course of the project. Remember to save the information entered before existing. After saving, the new department will appear in the tree view. Before saving, uncheck the 'Add Another' department selection if there are no other departments to be added.



The screenshot displays the 'Add Department' form in the Audaxware application. The form includes the following fields:

- Dept Name:** A text input field.
- Phase:** A dropdown menu currently showing '--select--'.
- Dept Area:** A text input field followed by '(SF)'.
- Type:** A dropdown menu currently showing 'ADMIN'.
- Contact Name:** A text input field.
- Phone:** A text input field.
- Email:** A text input field.
- Comment:** A large text area.

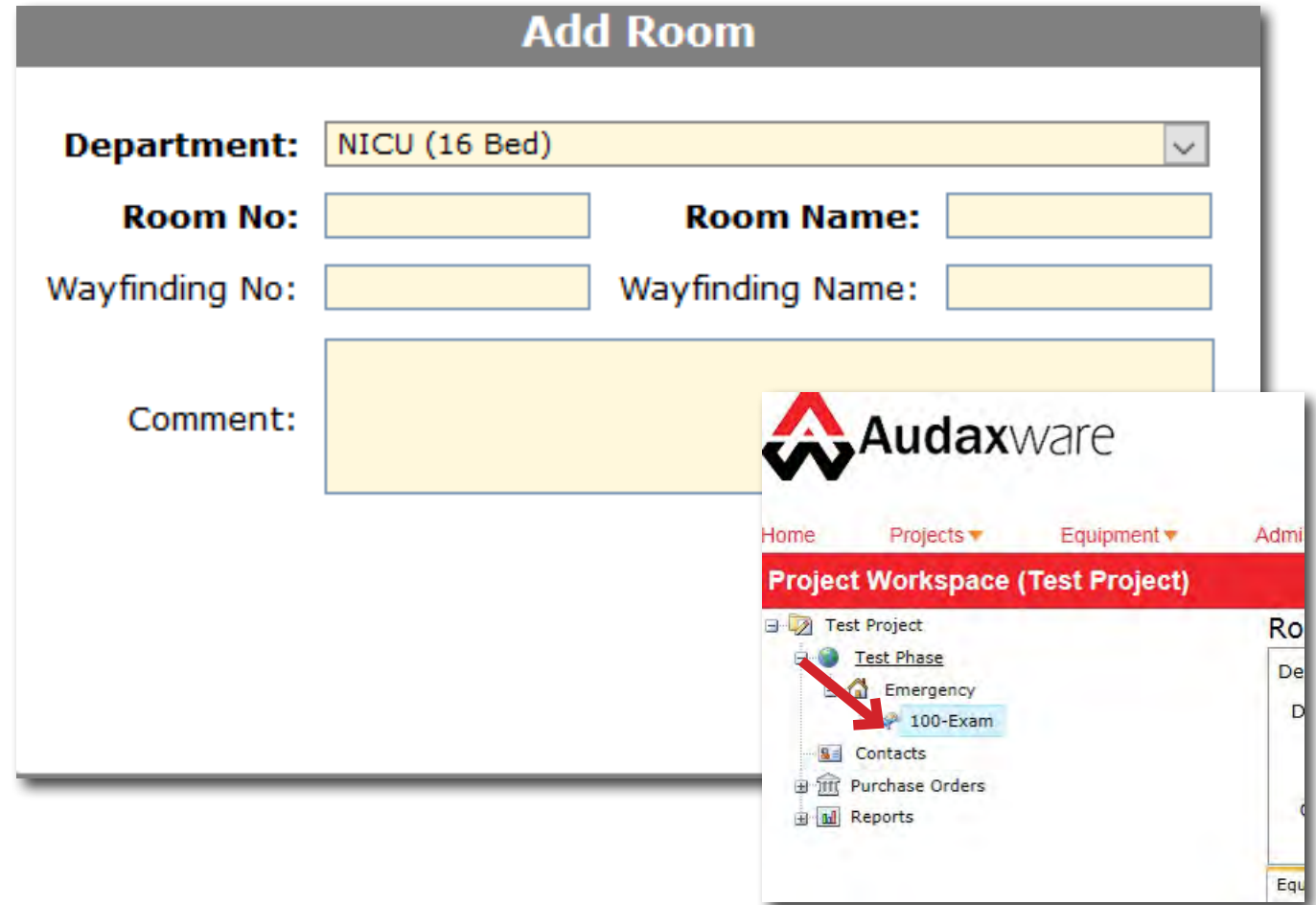
At the bottom of the form are 'Save' and 'Close' buttons. An inset window shows the 'Project Workspace (Test Project)' tree view. A red arrow points to the 'Emergency' department under the 'Test Phase' in the tree view.

STARTING A PROJECT: PROJECT HIERARCHY (Cont'd)

DEPARTMENT ROOM(s): Rooms are added in the same manner as phases and departments, there is no limit to the number of rooms in a department. Simply click the 'Add Room' button in the 'Room' tab. The planner will be prompted for room information including the Room No and Room Name.

"Room" vs "Wayfinding" information: Often times on a project, the information on the drawings may differ from the final room information (i.e. the information on the room signage). This is important to distinguish because the drawing information is important during the earlier phases of the project, but the Final room information is critical during the deployment/implementation phase. The data entered for the Room can be edited at any time during the course of the project.

Remember to save the information entered before existing. After saving, the new room will appear in the tree view. Before saving, uncheck the 'Add Another' room selection if there are no other rooms to be added.



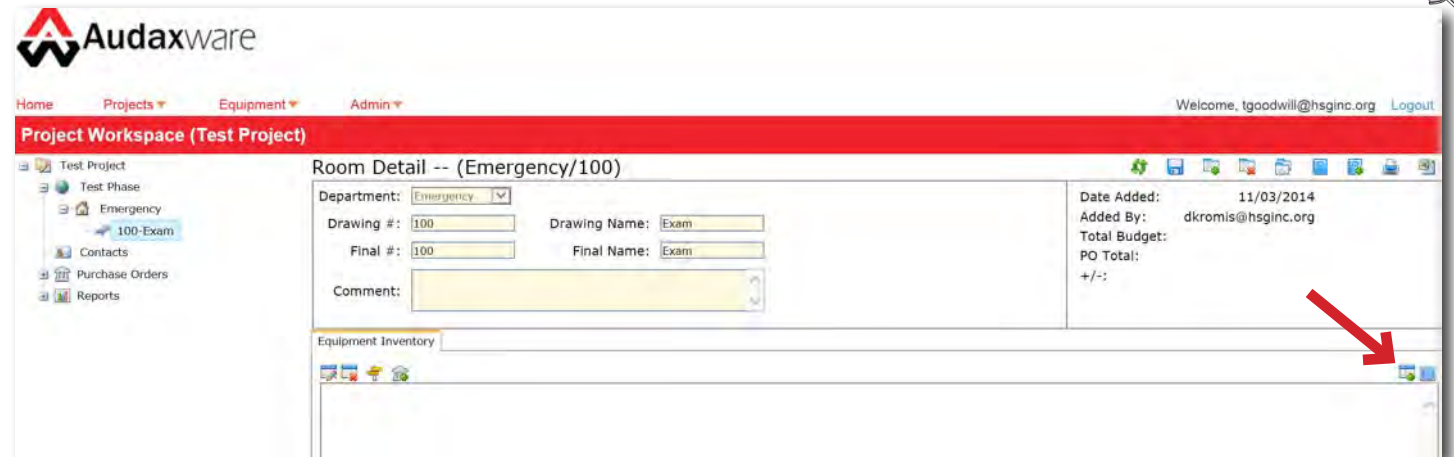
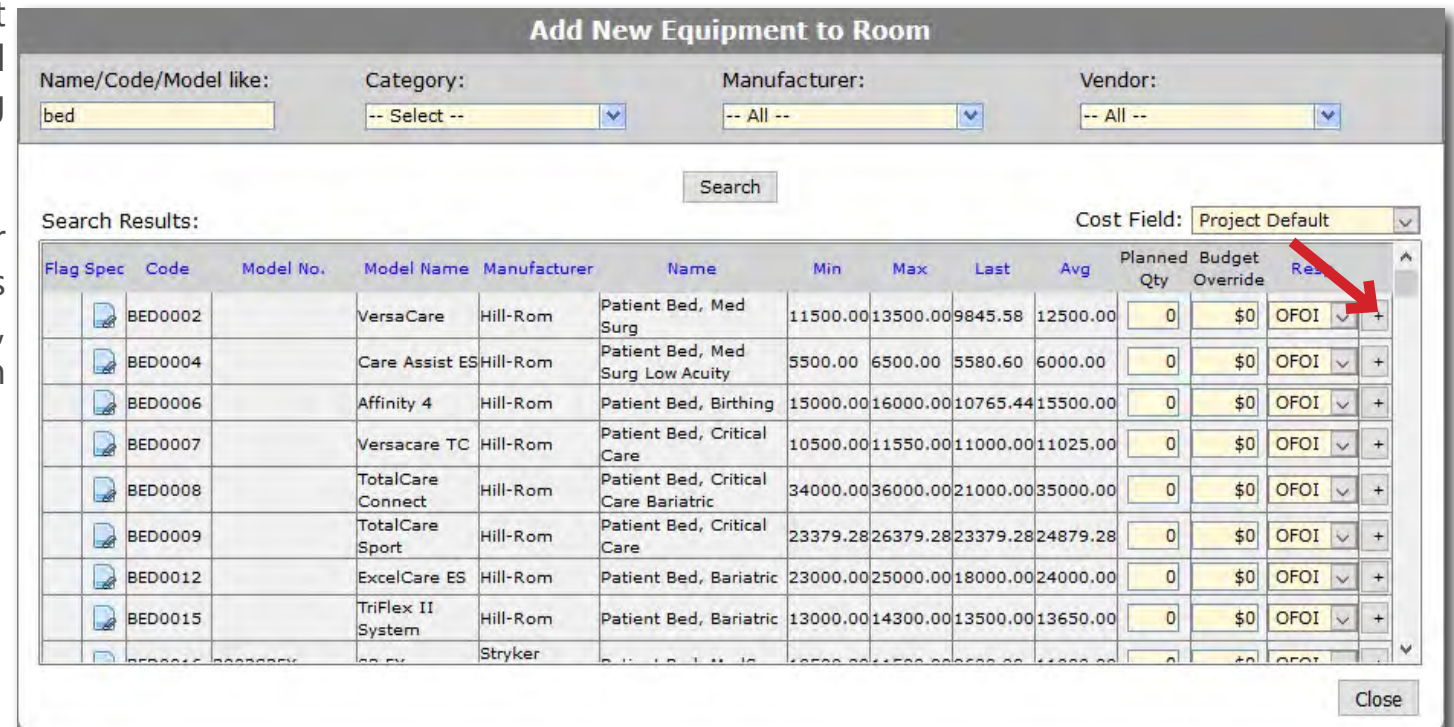
The image shows two overlapping screenshots from the Audaxware software. The background screenshot is the 'Add Room' form, which has a title bar 'Add Room' and the following fields: 'Department:' with a dropdown menu showing 'NICU (16 Bed)', 'Room No:' and 'Room Name:' as text input fields, 'Wayfinding No:' and 'Wayfinding Name:' as text input fields, and a 'Comment:' text area. The foreground screenshot is a 'Project Workspace (Test Project)' window. It features the Audaxware logo and a navigation bar with 'Home', 'Projects', 'Equipment', and 'Admin'. Below the navigation bar is a tree view showing the project hierarchy: 'Test Project' (expanded) contains 'Test Phase' (expanded), which contains 'Emergency' (expanded), which contains '100-Exam' (highlighted with a red arrow). Other items in the tree view include 'Contacts', 'Purchase Orders', and 'Reports'.

STARTING A PROJECT: ADDING EQUIPMENT

Equipment is added to a project at the room level. All information associated with the equipment is. Equipment can be added to a room in a variety of ways which are highlighted in the following sections.

Add a piece of equipment to a room by selecting the room from the tree view and click the 'Add Inventory' button. The planner can then search by equipment name or code search as well as filter by category, manufacturer and/or vendor. The planner is able to view cut sheets for each item to help in selecting the appropriate piece of equipment. Once decided on the correct item, enter the quantity and click the '+' button. The line will turn blue once the item(s) has been added to the underlying room.

At this time the user is able to view the associated budgets for the equipment. The planner may override the unit budget as well as change the responsibility for the equipment (i.e. OFOI, OFCI, OFVI etc.). The prefix 'EX' in the responsibility denotes an existing asset in which the budget will default to \$0.

Flag	Spec	Code	Model No.	Model Name	Manufacturer	Name	Min	Max	Last	Avg	Planned Qty	Budget Override	Res
		BED0002		VersaCare	Hill-Rom	Patient Bed, Med Surg	11500.00	13500.00	9845.58	12500.00	0	\$0	OFOI
		BED0004		Care Assist ES	Hill-Rom	Patient Bed, Med Surg Low Acuity	5500.00	6500.00	5580.60	6000.00	0	\$0	OFOI
		BED0006		Affinity 4	Hill-Rom	Patient Bed, Birthing	15000.00	16000.00	10765.44	15500.00	0	\$0	OFOI
		BED0007		Versacare TC	Hill-Rom	Patient Bed, Critical Care	10500.00	11550.00	11000.00	11025.00	0	\$0	OFOI
		BED0008		TotalCare Connect	Hill-Rom	Patient Bed, Critical Care Bariatric	34000.00	36000.00	21000.00	35000.00	0	\$0	OFOI
		BED0009		TotalCare Sport	Hill-Rom	Patient Bed, Critical Care	23379.28	26379.28	23379.28	24879.28	0	\$0	OFOI
		BED0012		ExcelCare ES	Hill-Rom	Patient Bed, Bariatric	23000.00	25000.00	18000.00	24000.00	0	\$0	OFOI
		BED0015		TriFlex II System	Hill-Rom	Patient Bed, Bariatric	13000.00	14300.00	13500.00	13650.00	0	\$0	OFOI
		BED0016		ExcelCare ES	Stryker	Patient Bed, Bariatric	13000.00	14300.00	13500.00	13650.00	0	\$0	OFOI

STARTING A PROJECT: COPYING EQUIPMENT

The planner is able to copy an entire room to another room within that department or another department.

In the tree view, select the room to be copied, then click on the 'copy' icon in the top right corner of the screen. In the modal, the planner selects the desired phase-department destination to copy the room to, then enter the room numbers and room name.

The planner has the ability to copy the options/colors from the existing room if the selections have already been made.

NOTE: All of the rooms to be copied will have the same name. Do not add spaces before or after commas as this will add a space after or before the room number respectively.



Home Projects Equipment Admin Contact Us Welcome, daniel.kromis@audaxware.com Logout

Project Workspace (Central Health South Clinic)

Central Health South Clinic

Phase 1

- Dental
 - 300-Waiting
 - 301-Intake
 - 302-Unassigned
 - 303-Bio Hazard
 - 304-Dental Asst
 - 305-Hygenist
 - 307-Vacc
 - 308-Provider Wk
 - 309-Staff Toilet
 - 310-Public Toilet
 - 312-Panorex
 - 313-Sterile
 - 314-OP
 - 315-OP

Room Detail (Dental/300)

Department: Dental

Room No: 300 Room Name: Waiting

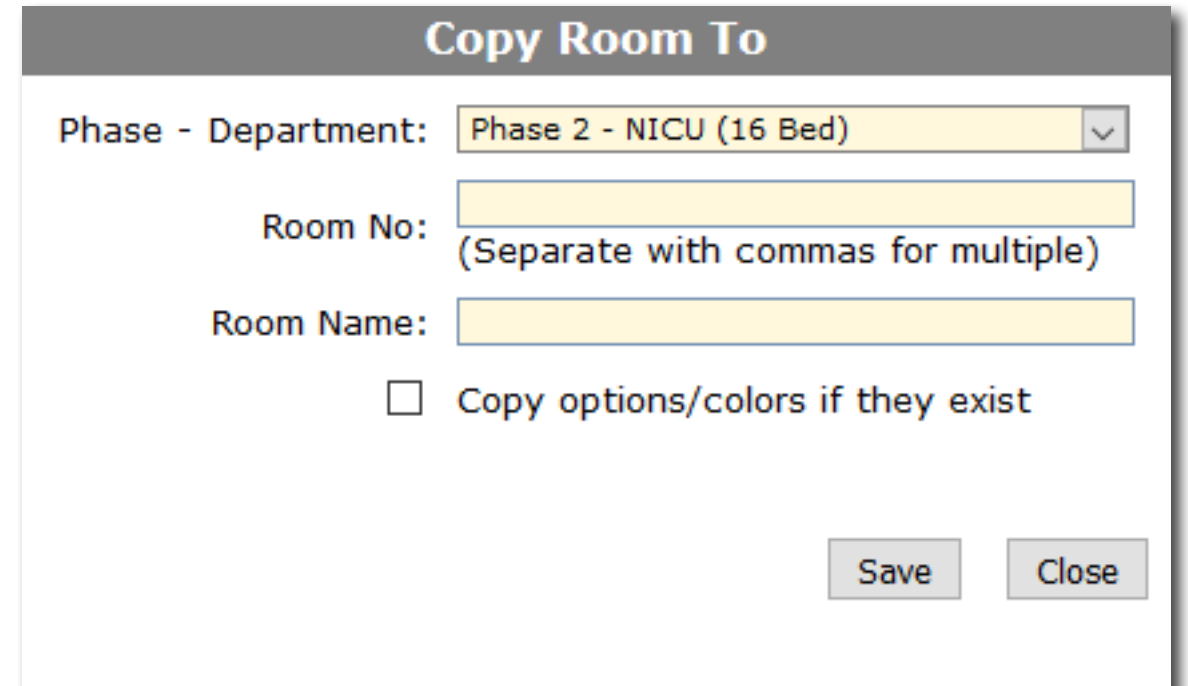
Wayfinding No: 300 Wayfinding Name: Waiting

Comment:

Equipment Inventory IT Connectivity

Search inventory...

Date Added: 02/02/2014
Added By: tgoodwill@hsginc.org
Total Budget:
PO Total:
+/- :



Copy Room To

Phase - Department: Phase 2 - NICU (16 Bed)

Room No: (Separate with commas for multiple)

Room Name:

☐ Copy options/colors if they exist

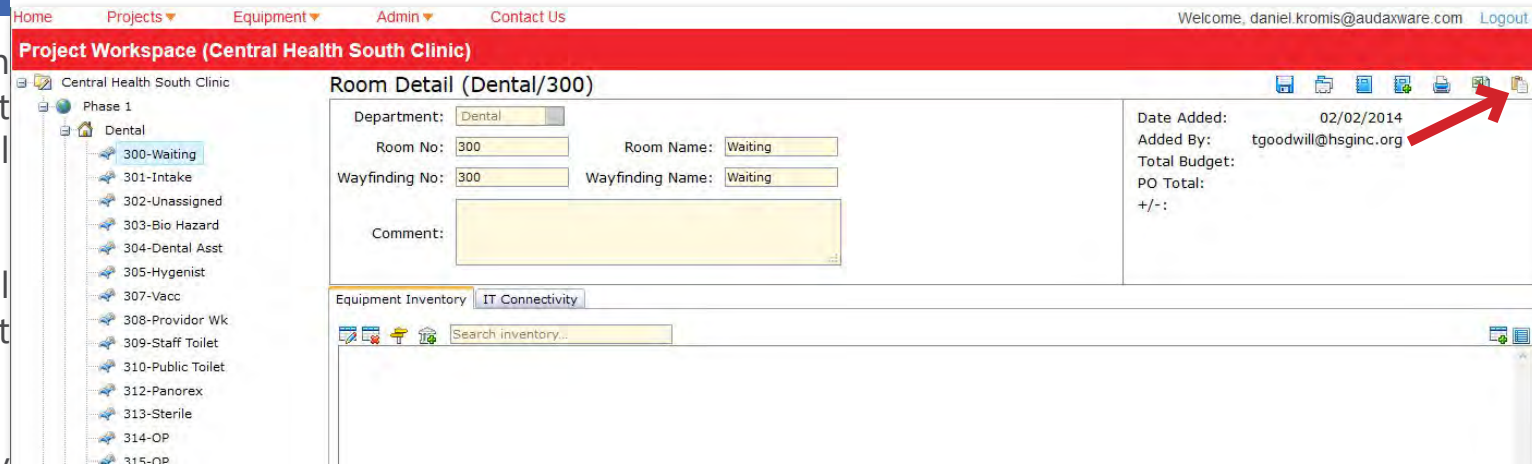
Save Close

STARTING A PROJECT: COPYING EQUIPMENT (Cont'd)

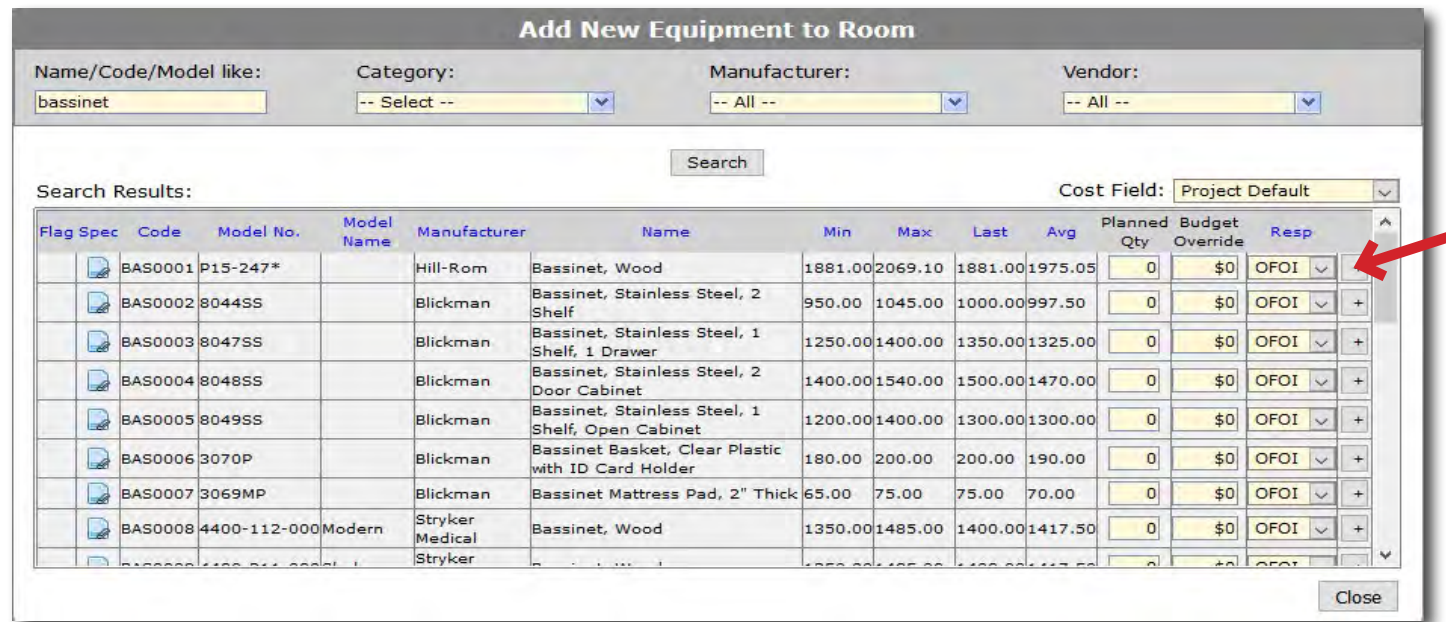
The planner is also able to copy a phase, department, or room from another project or even an entire project to the current project. When selected, the planner will be prompted to drill down and select what is to be copied to the current project.

For example, the selection made to the right would copy all of the rooms in the Central Sterile Department from the Test Medical Center SPD project.

Select the "Copy options/colors if they exist" to migrate any option and color selections made in the Test Medical Center SPD project. If left unchecked, the planner will need to make new color and option selections in the current project as necessary.



The screenshot shows the 'Project Workspace (Central Health South Clinic)' with a sidebar listing various rooms under 'Phase 1' and 'Dental'. The 'Room Detail (Dental/300)' form is open, showing fields for Department, Room No, Room Name, Wayfinding No, Wayfinding Name, and Comment. A red arrow points to the 'Copy options/colors if they exist' checkbox in the 'Equipment Inventory' section.



The 'Add New Equipment to Room' dialog box shows search results for 'bassinet'. The search results table lists various equipment items with their specifications, prices, and quantities. A red arrow points to the 'Resp' column in the table.

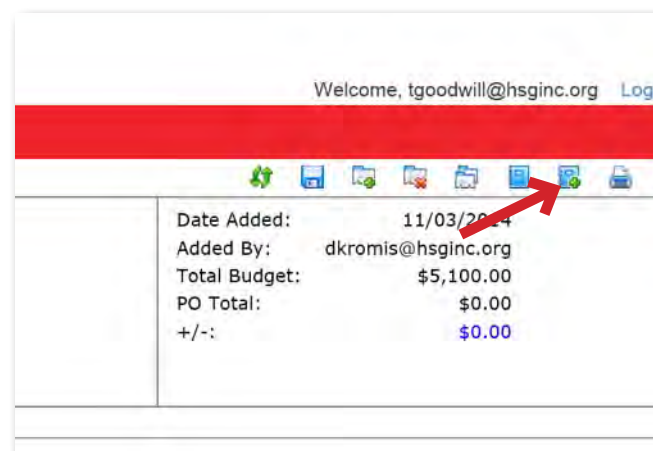
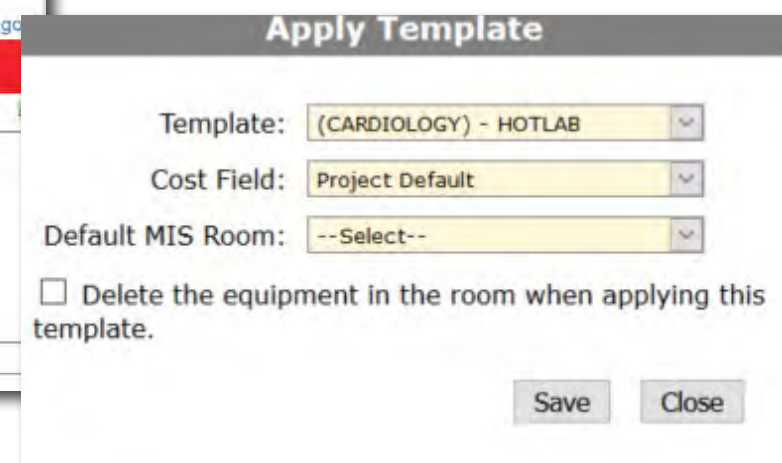
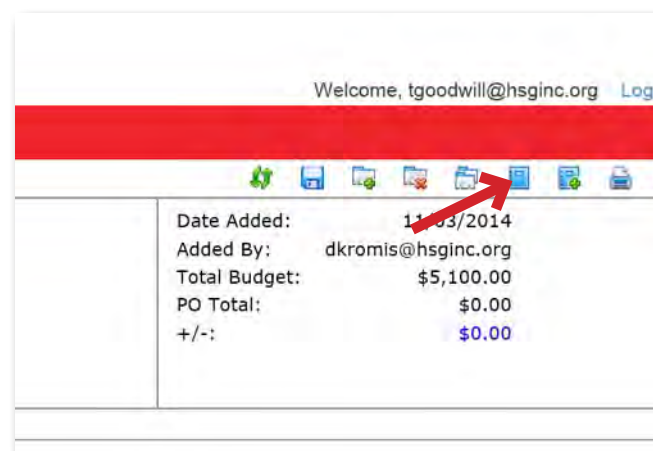
Flag	Spec	Code	Model No.	Model Name	Manufacturer	Name	Min	Max	Last	Avg	Planned Qty	Budget Override	Resp
		BAS0001	P15-247*		Hill-Rom	Bassinet, Wood	1881.00	2069.10	1881.00	1975.05	0	\$0	OFOI
		BAS0002	8044SS		Blickman	Bassinet, Stainless Steel, 2 Shelf	950.00	1045.00	1000.00	997.50	0	\$0	OFOI
		BAS0003	8047SS		Blickman	Bassinet, Stainless Steel, 1 Shelf, 1 Drawer	1250.00	1400.00	1350.00	1325.00	0	\$0	OFOI
		BAS0004	8048SS		Blickman	Bassinet, Stainless Steel, 2 Door Cabinet	1400.00	1540.00	1500.00	1470.00	0	\$0	OFOI
		BAS0005	8049SS		Blickman	Bassinet, Stainless Steel, 1 Shelf, Open Cabinet	1200.00	1400.00	1300.00	1300.00	0	\$0	OFOI
		BAS0006	3070P		Blickman	Bassinet Basket, Clear Plastic with ID Card Holder	180.00	200.00	200.00	190.00	0	\$0	OFOI
		BAS0007	3069MP		Blickman	Bassinet Mattress Pad, 2" Thick	65.00	75.00	75.00	70.00	0	\$0	OFOI
		BAS0008	4400-112-000	Modern	Stryker Medical	Bassinet, Wood	1350.00	1485.00	1400.00	1417.50	0	\$0	OFOI

STARTING A PROJECT: WORKING WITH TEMPLATES

Templates are an excellent way to save time by creating a standard set of equipment for a particular room type. Once equipment from a template is applied to a room, the equipment can be edited in the project without affecting the template.

CREATING TEMPLATES: Simply click the 'Save as Template' button and name the template appropriately. The equipment codes and respective quantities will be stored.

APPLYING TEMPLATES: To apply a template that has been previously created, click on 'Apply Template' and select the appropriate template. The equipment codes and respective quantities will populate the room. The most recent budget information will be pulled from the database to ensure real time information. **IMPORTANT:** any existing equipment in the room will be removed/deleted automatically.

A screenshot of the 'Save as Template' dialog box. It has a title bar that says 'Save as Template'. Inside, there is a 'Save As:' label followed by a dropdown menu with the text '-- Select or Enter New --'. Below this is a large text area labeled 'Comment:'. At the bottom right, there are two buttons: 'Save' and 'Close'.A screenshot of the 'Apply Template' dialog box. It has a title bar that says 'Apply Template'. Inside, there are three dropdown menus: 'Template:' with the value '(CARDIOLOGY) - HOTLAB', 'Cost Field:' with the value 'Project Default', and 'Default MIS Room:' with the value '--Select--'. Below these is a checkbox labeled 'Delete the equipment in the room when applying this template.' At the bottom right, there are two buttons: 'Save' and 'Close'.

STARTING A PROJECT A PROJECT: COST CENTERS

Often times a project has one or more cost centers associated with it depending on the type or value of equipment. Cost centers are defined in Audaxware at the project level by selecting the 'Cost Center' tab and adding one more cost centers. Cost centers can be added at anytime during the course of a project.

As cost centers are added the planner can select the cost center as the 'Default' cost center; any equipment added in the future will automatically be applied to this cost center. The planner can also update all existing equipment with the new cost center. Once cost centers are established; the cost center can be changed by editing 'Single' or 'Multiple' items; Reference 'Working with a Project' for more information.

Add Cost Center

Code:

Description:

☐ Default

☐ Update all equipment in the project to this cost center?

Save **Close**

Project Detail

Prj Name: Status:

Client: Client Prj#: Def Cost:

Hospital: Hosp Prj#: Planner Prj#:

Address 1:

Address 2:

City: State: Zip:

Comment:

Date Added: 08/14/2013
Added By: jjack
Client Budget:

	Planned	Charges
Freight:	<input type="text" value="500,000.00"/>	\$118,596.18
Tax:	<input type="text" value="0.00"/>	\$0.00
Warranty:	<input type="text" value="0.00"/>	\$0.00
Misc:	<input type="text" value="0.00"/>	\$0.00
Planned Budget:	\$55,588,759.00	
PO Total:	\$26,269,345.93	
Projected Budget:	\$52,471,087.00	
+/- Client:	\$528,913.00	
+/- Planned:	\$3,117,672.65	

Project Phases **Equipment Inventory** **Cost Center**

	Code	Description	Is Default
<input type="checkbox"/>	1402807144	TXAUS1402807144 Capital	Yes

STARTING A PROJECT: PROJECT ADDRESSES

Project addresses are created at the main Project Detail. Address are used primarily during the purchasing process to assign ship to addresses for equipment/purchase orders.

CREATING ADDRESSES: Simply click the 'Address' tab and select the 'Add Address' icon. Enter the address information as applicable. The Address can be set as the default address.

Project Detail

Prj Name:
Status:

Client:
Project No.:
Def Cost:

Facility:
Project No.:

Address 1:

Address 2:

City:
State:
Zip:

Comment:

Project Phases
Equipment Inventory
Cost Center
Address

Add Address

Nickname:

Address 1:

Address 2:

City:

State:

Zip:

Description:

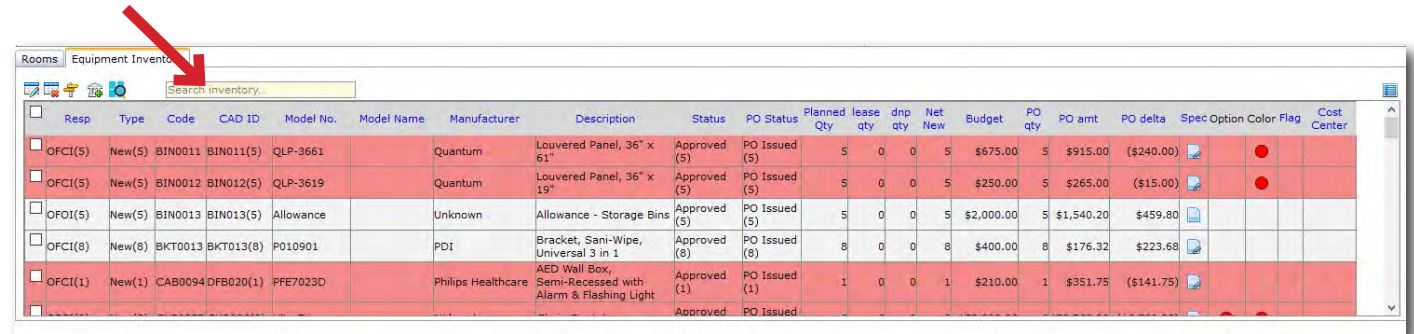
☐ Default

Save
Close

Warranty:	<input type="text" value="0.00"/>	\$0.00
Misc:	<input type="text" value="0.00"/>	\$0.00
Planned Budget:		\$2,560,216.00
PO Total:		\$0.00
Projected Cost:		\$2,560,216.00
Client Budget Delta:		(\$2,560,216.00)
Planned Budget Delta:		\$0.00

WORKING IN A PROJECT: EQUIPMENT SEARCHING

When accessing a project, especially large projects, it is very beneficial to search the equipment inventory for key words, model names, model numbers, or equipment type (i.e. existing vs new). When a keyword(s) is entered in the search window, the equipment inventory will be filtered as a result of the search.



Resp	Type	Code	CAD ID	Model No.	Model Name	Manufacturer	Description	Status	PO Status	Planned Qty	Lease Qty	DNP Qty	Net New	Budget	PO Qty	PO amt	PO delta	Spec Option	Color	Flag	Cost Center
OFCI(5)	New(5)	BIN0011	BIN011(5)	QLP-3661		Quantum	Louvered Panel, 36" x 61"	Approved (5)	PO Issued (5)	5	0	0	5	\$675.00	5	\$915.00	(\$240.00)				
OFCI(5)	New(5)	BIN0012	BIN012(5)	QLP-3619		Quantum	Louvered Panel, 36" x 19"	Approved (5)	PO Issued (5)	5	0	0	5	\$250.00	5	\$265.00	(\$15.00)				
OFOI(5)	New(5)	BIN0013	BIN013(5)	Allowance		Unknown	Allowance - Storage Bins	Approved (5)	PO Issued (5)	5	0	0	5	\$2,000.00	5	\$1,540.20	\$459.80				
OFCI(8)	New(8)	BKT0013	BKT013(8)	P010901		PDI	Bracket, Sani-Wipe, Universal 3 in 1	Approved (8)	PO Issued (8)	8	0	0	8	\$400.00	8	\$176.32	\$223.68				
OFCI(1)	New(1)	CAB0094	DFB020(1)	FFE7023D		Philips Healthcare	AED Wall Box, Semi-Recessed with Alarm & Flashing Light	Approved (1)	PO Issued (1)	1	0	0	1	\$210.00	1	\$351.75	(\$141.75)				

Another beneficial tool when working in large scale projects is the ability to quickly display equipment locations. In the example to the right, the user selected BKT0013 and click on the room search icon to display the location of all eight brackets. The user can then click on the hyperlink to a specific room/location or close the window and return to the equipment inventory.

Code	Description	Model Nr.	Model Name	Phase	Department	Room	Planned Qty	Lease Qty	DNP Qty	Resp	EQ Status	PO Status	Budget
BKT0013	Bracket, Sani-Wipe, Universal 3 in 1	P010901		Phase 1	Dental	314-OP	1	0	0	OFCI	Approved	PO Issued	\$ 50.00
BKT0013	Bracket, Sani-Wipe, Universal 3 in 1	P010901		Phase 1	Dental	315-OP	1	0	0	OFCI	Approved	PO Issued	\$ 50.00
BKT0013	Bracket, Sani-Wipe, Universal 3 in 1	P010901		Phase 1	Dental	316-OP	1	0	0	OFCI	Approved	PO Issued	\$ 50.00
BKT0013	Bracket, Sani-Wipe, Universal 3 in 1	P010901		Phase 1	Dental	317-OP	1	0	0	OFCI	Approved	PO Issued	\$ 50.00
BKT0013	Bracket, Sani-Wipe, Universal 3 in 1	P010901		Phase 1	Dental	318-OP	1	0	0	OFCI	Approved	PO Issued	\$ 50.00
BKT0013	Bracket, Sani-Wipe, Universal 3 in 1	P010901		Phase 1	Dental	319-OP	1	0	0	OFCI	Approved	PO Issued	\$ 50.00
BKT0013	Bracket, Sani-Wipe, Universal 3 in 1	P010901		Phase 1	Dental	322-OP	1	0	0	OFCI	Approved	PO Issued	\$ 50.00
BKT0013	Bracket, Sani-Wipe, Universal 3 in 1	P010901		Phase 1	Dental	323-OP	1	0	0	OFCI	Approved	PO Issued	\$ 50.00

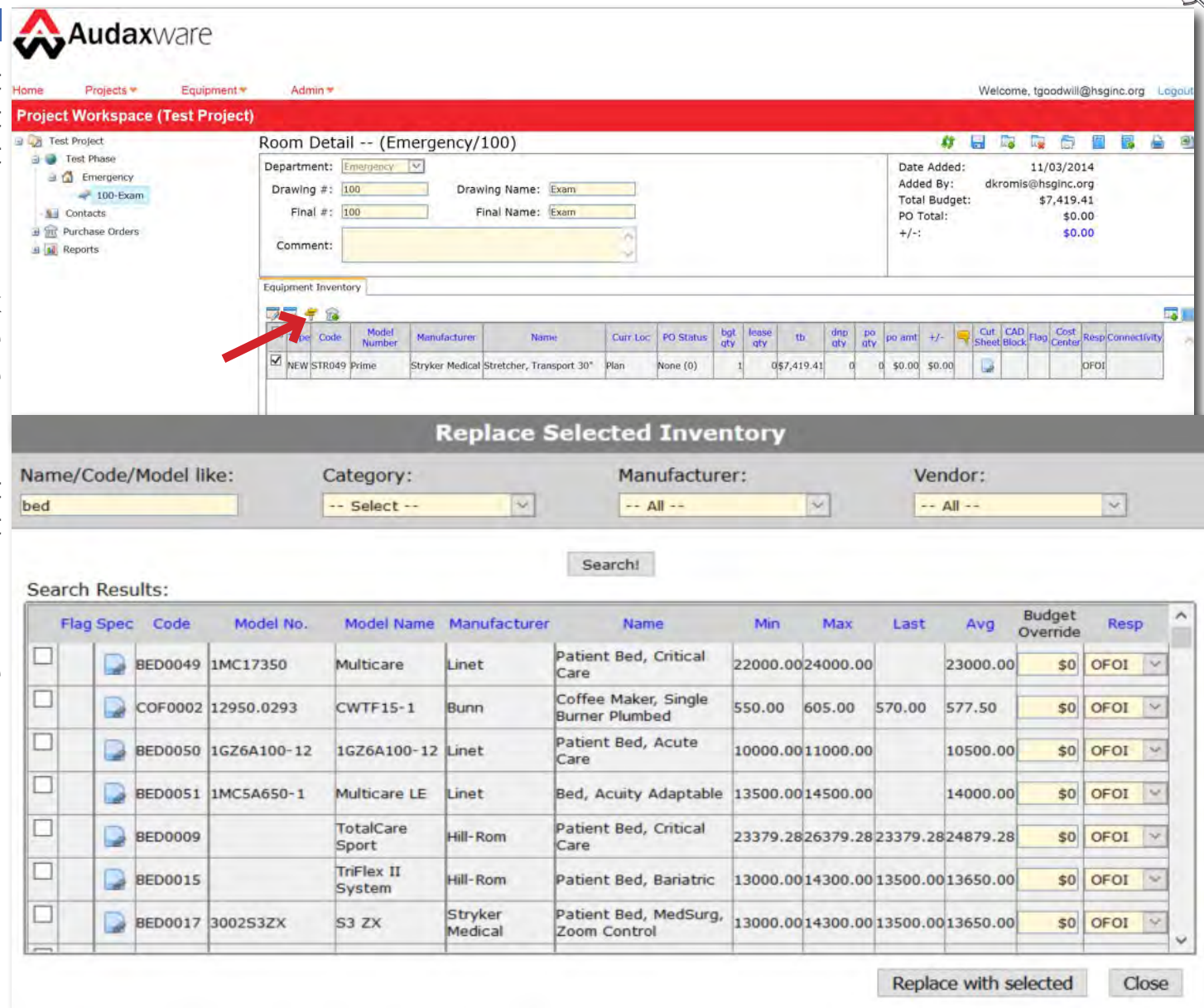
WORKING IN A PROJECT: REPLACING EQUIPMENT

Equipment can be replaced with alternate equipment at any level of the Project Hierarchy. **IMPORTANT:** equipment replacement at one level will replace all of the equipment at that level and all levels below.

When the need arises to replace a piece of equipment with a different item, simply select the item to be replaced and click the 'replace inventory' button. In the subsequent pop-up the planner searches for the new item, selects it and clicks the 'Replace with Selected' button.

The user is also able to override the budget for the equipment and change the responsibility before replacing the equipment to avoid having to edit the equipment after it has been added to the project.

IMPORTANT: Selected equipment will be replaced at the current hierarchy level and any levels below.



The screenshot shows the Audaxware Planner interface. The top navigation bar includes 'Home', 'Projects', 'Equipment', and 'Admin'. The main window displays 'Project Workspace (Test Project)' with a sidebar showing a project hierarchy: 'Test Project' > 'Test Phase' > 'Emergency' > '100-Exam'. The 'Room Detail -- (Emergency/100)' section shows fields for 'Department' (Emergency), 'Drawing #', 'Drawing Name', 'Final #', 'Final Name', and 'Comment'. A red arrow points to the 'Replace Inventory' button in the 'Equipment Inventory' table. The 'Replace Selected Inventory' dialog box is open, showing search criteria: 'Name/Code/Model like: bed', 'Category: -- Select --', 'Manufacturer: -- All --', and 'Vendor: -- All --'. The 'Search Results' table lists various equipment items with columns for 'Flag Spec', 'Code', 'Model No.', 'Model Name', 'Manufacturer', 'Name', 'Min', 'Max', 'Last', 'Avg', 'Budget Override', and 'Resp'. The 'Replace with selected' button is highlighted at the bottom right of the dialog.

Flag Spec	Code	Model No.	Model Name	Manufacturer	Name	Min	Max	Last	Avg	Budget Override	Resp
<input type="checkbox"/>	BED0049	1MC17350	Multicare	Linnet	Patient Bed, Critical Care	22000.00	24000.00		23000.00	\$0	OFOI
<input type="checkbox"/>	COF0002	12950.0293	CWTF15-1	Bunn	Coffee Maker, Single Burner Plumbed	550.00	605.00	570.00	577.50	\$0	OFOI
<input type="checkbox"/>	BED0050	1GZ6A100-12	1GZ6A100-12	Linnet	Patient Bed, Acute Care	10000.00	11000.00		10500.00	\$0	OFOI
<input type="checkbox"/>	BED0051	1MC5A650-1	Multicare LE	Linnet	Bed, Acuity Adaptable	13500.00	14500.00		14000.00	\$0	OFOI
<input type="checkbox"/>	BED0009		TotalCare Sport	Hill-Rom	Patient Bed, Critical Care	23379.28	26379.28	23379.28	24879.28	\$0	OFOI
<input type="checkbox"/>	BED0015		TriFlex II System	Hill-Rom	Patient Bed, Bariatric	13000.00	14300.00	13500.00	13650.00	\$0	OFOI
<input type="checkbox"/>	BED0017	3002S3ZX	S3 ZX	Stryker Medical	Patient Bed, MedSurg, Zoom Control	13000.00	14300.00	13500.00	13650.00	\$0	OFOI

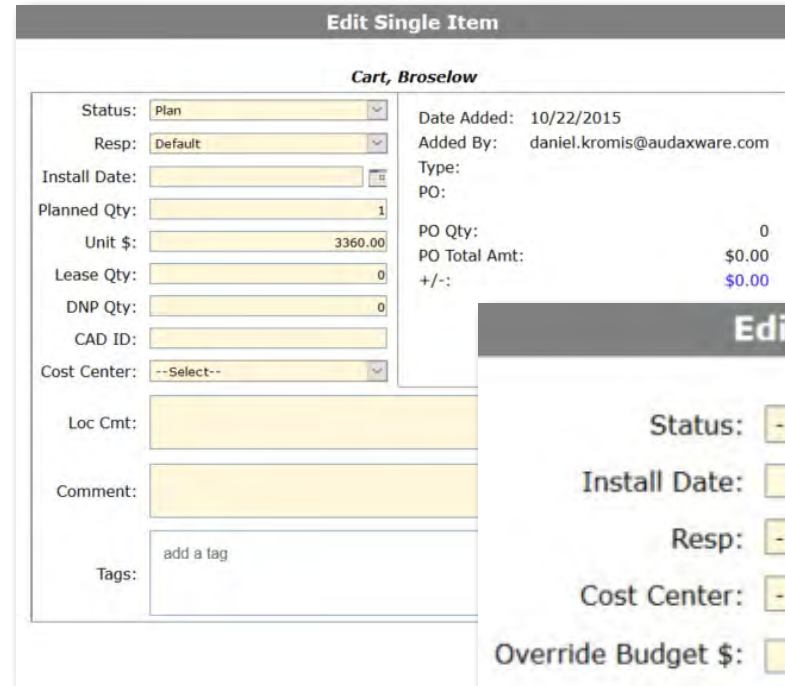
WORKING IN A PROJECT: EDITING EQUIPMENT

Equipment attributes can be edited at any level of the project hierarchy. However, depending on which level of the project hierarchy the equipment is selected limits the attributes that can be edited. After double clicking on a piece of equipment; a pop-up will appear which will display the attributes that are available for editing.

The lowest level of a project is the room, the planner is able to 'Edit Single Items'. The planner can edit all of the attributes associated with the project: responsibility, delivery date, quantities, location, CAD ID, cost center, IT connectivity (discussed later) as well as comments and tags to equipment.

At higher levels in the hierarchy (i.e. department, phase, project level); the planner is in essence overriding all attribute at the current level as well as lower levels. For example, if the budget is changed for a particular equipment at the phase level, the budget for that particular piece of equipment will be changed for all instance of the equipment in that phase including all associated departments and rooms.

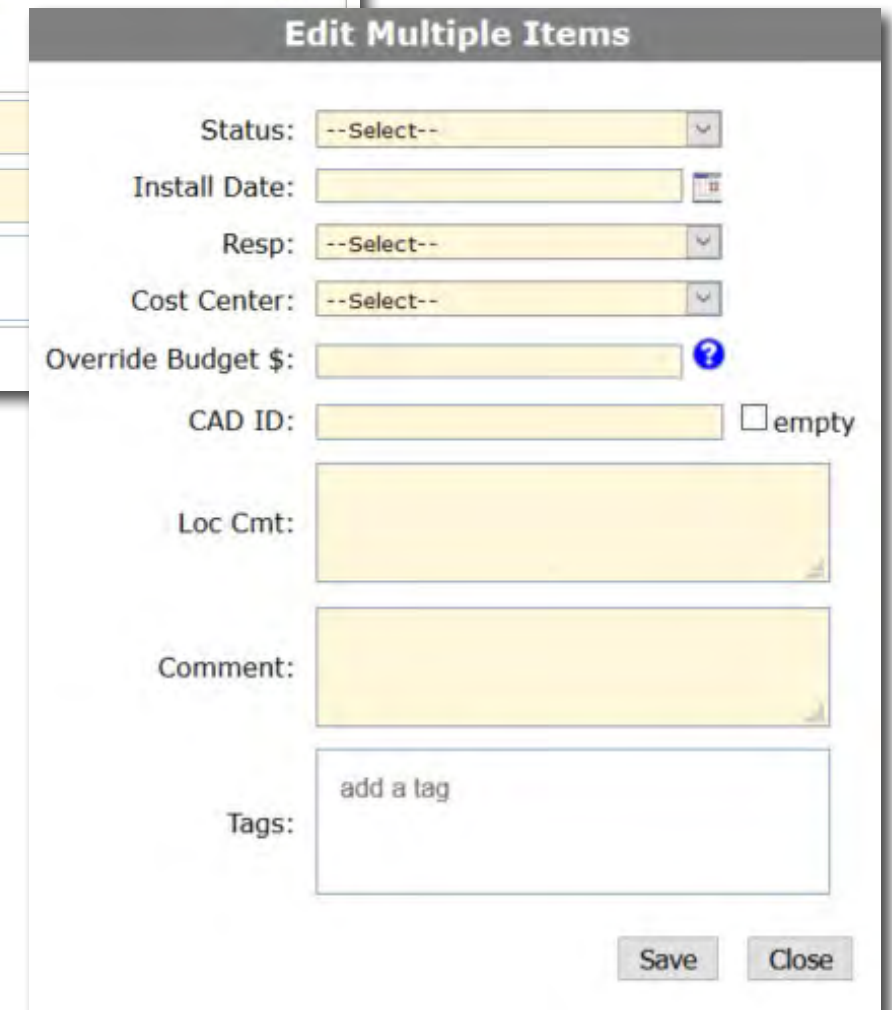
IMPORTANT: Budget overrides will not change the equipment budget for items that have started the purchasing process.



Edit Single Item

Cart, Broselow

Status: <input type="text" value="Plan"/>	Date Added: 10/22/2015
Resp: <input type="text" value="Default"/>	Added By: daniel.kromis@audaxware.com
Install Date: <input type="text"/>	Type:
Planned Qty: <input type="text" value="1"/>	PO:
Unit \$: <input type="text" value="3360.00"/>	PO Qty: 0
Lease Qty: <input type="text" value="0"/>	PO Total Amt: \$0.00
DNP Qty: <input type="text" value="0"/>	+/-: \$0.00
CAD ID: <input type="text"/>	
Cost Center: <input type="text" value="--Select--"/>	
Loc Cmt: <input type="text"/>	
Comment: <input type="text"/>	
Tags: <input type="text" value="add a tag"/>	



Edit Multiple Items

Status: <input type="text" value="--Select--"/>
Install Date: <input type="text"/>
Resp: <input type="text" value="--Select--"/>
Cost Center: <input type="text" value="--Select--"/>
Override Budget \$: <input type="text"/> ?
CAD ID: <input type="text"/> <input type="checkbox"/> empty
Loc Cmt: <input type="text"/>
Comment: <input type="text"/>
Tags: <input type="text" value="add a tag"/>

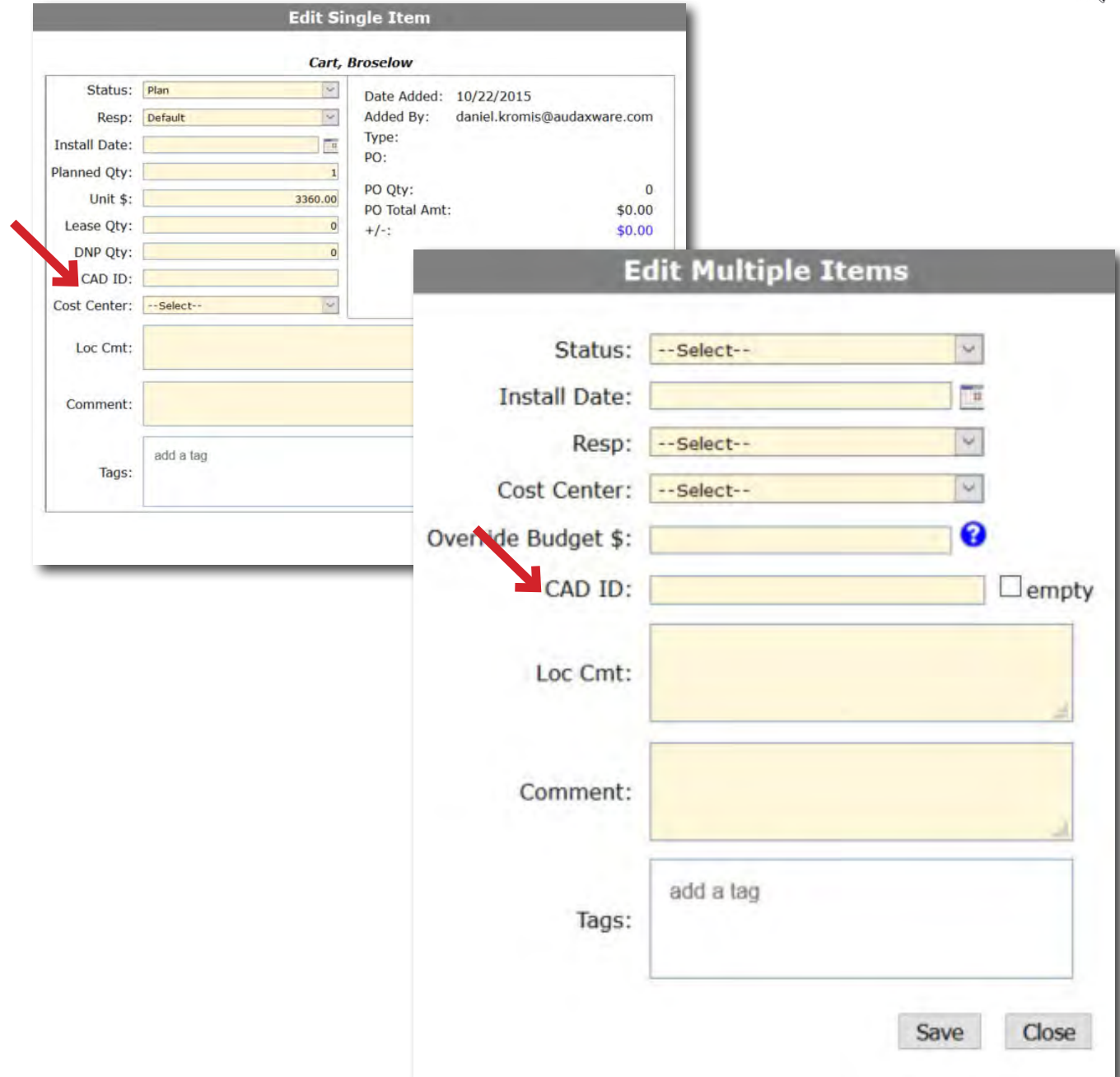
Save Close

WORKING IN A PROJECT: CAD ID'S

CAD ID's are in essence alternate asset codes. Asset codes are predefined by Audaxware; however, the user is able to assign and alter code (CAD ID) in the event the user wishes to reference the asset by an alternate identifier.


The CAD ID is viewable in the equipment inventory tab(s) as well as asset reports.

In the event the user needs to delete existing CAD ID's in the project; the user can either delete a single instance of a CAD ID in the 'Edit Single Item' modal or erase all CAD ID's associated with the equipment in 'Edit Multiple Equipment' modal. Erasing all CAD ID's for a given asset is done by selecting the 'Empty' check box adjacent to the CAD ID field prior to saving and closing the modal.





Edit Single Item

Cart, Broselow

Status: Date Added: 10/22/2015
Resp: Added By: daniel.kromis@audaxware.com
Install Date: Type:
Planned Qty: PO:
Unit \$: PO Qty:
Lease Qty: PO Total Amt:
DNP Qty: +/-:
CAD ID: 
Cost Center:
Loc Cmt:
Comment:
Tags:

Edit Multiple Items

Status:
Install Date:
Resp:
Cost Center:
Override Budget \$: 
CAD ID: ☐ empty 
Loc Cmt:
Comment:
Tags:


WORKING IN A PROJECT: TAGGING EQUIPMENT

The planner can add project specific 'Tags' to equipment when editing 'Single' or 'Multiple' items. Tags are used to add a note or comment to a specific piece of equipment for quick reference. Tags can be added or deleted at any stage of the project. The tags are local to the project and do not impact the database.

As with editing equipment, adding tags at higher levels in the project hierarchy will add the associated tags at the current level as well as any instances of the equipment at lower levels.

Equipment Inventory

IT Connectivity



Search inventory...

<input type="checkbox"/>	Resp Type	Code	CAD ID	Model No.	Model Name	Manufacturer	Descrip
<input type="checkbox"/>	OFOINew	CRT0101		6353D		Brewer	Cart, Plastic Utility, 3 Shelf(flower cart)
<input type="checkbox"/>	OFOINew	IVS0008		P-1572*		Pedigo	IV Stand, Stainless Steel, Friction Lock, Five Leg Base
<input type="checkbox"/>	OFOINew	LFT0025		RCLB-6002		Humancare (Barton Medical)	Lift, Mobile, 700lb Capacity
<input type="checkbox"/>	OFOINew	PHL0002			Venoscope II	Venoscope	Vein Viewer, Transilluminator, Handheld

Edit Single Item

Cart, Plastic Utility, 3 Shelf

Status: <input type="text" value="Plan"/>	Date Added: 10/22/2015
Resp: <input type="text" value="Default"/>	Added By: daniel.kromis@audaxware.com
Install Date: <input type="text"/>	Type:
Planned Qty: <input type="text" value="3"/>	PO:
Unit \$: <input type="text" value="225.00"/>	PO Qty: 0
Lease Qty: <input type="text" value="0"/>	PO Total Amt: \$0.00
DNP Qty: <input type="text" value="0"/>	+/-: \$0.00
CAD ID: <input type="text"/>	
Cost Center: <input type="text" value="--Select--"/>	
Loc Cmt: <input type="text"/>	
Comment: <input type="text"/>	
Tags: <input type="text" value="Flower Cart x"/>	

WORKING IN A PROJECT: EQUIPMENT OPTIONS & COLORS

The option and color selection process is not required however can be very helpful in ensuring a successful project.







Equipment inventory in a project which have options and/or colors available for selection have either a red, yellow, or green icon in either the option or color column in the equipment inventory. A red icon indicates no selection have been made. A yellow icon indicates some selections have been made; however, there is/are equipment selections required. A green icon indicates to the user that all option/color selections are complete. Note: Option and/or color selections can be made at any level of a project hierarchy.

To make a selection simply click on the icon in the option or color column of the equipment inventory. For the example to the right, the IV pole has two options available. At any time during the course of the project, the user is able to select the applicable option/color icon and determine the locations for the various configurations by selecting the 'Locations' tab in the modal.

Equipment Inventory

IT Connectivity

Search inventory...

<input type="checkbox"/>	Resp Type	Code	CAD ID	Model No.	Model Name	Manufacturer	Description	Status	PO Status	Planned Qty	lease qty	dnp qty	Net New	Budget	PO qty	PO amt	PO delta		Spec	Option	Color
<input type="checkbox"/>	OFOI New	CRT0101		6353D		Brewer	Cart, Plastic Utility, 3 Shelf(flower cart)	Plan	None (3)	3	0	0	3	\$675.00	0	\$0.00	\$0.00				
<input type="checkbox"/>	OFOI New	IVS0008		P-1572*		Pedigo	IV Stand, Stainless Steel, Friction Lock, Five Leg Base	Plan	None (6)	6	0	0	6	\$2,205.00	0	\$0.00	\$0.00				

Option Selection

Option Selection

Options Locations

IV Stand, Stainless Steel, Friction Lock, Five Leg Base

1. Select the Location of equipment to apply options

Phase:

Department:

Room Name:

Room:

2. Select from the available equipment options for 6 locations

☐ [Select all]
☐ 2 Hook - P-1572-2
☐ 4 Hook - P-1572-4

Option Selection

Options Locations

IV Stand, Stainless Steel, Friction Lock, Five Leg Base

Options: 2 Hook

Phase	Department	Room	Planned Qty	Resp
MedSurg	MedSurg	EQ 03-STORAGE	6	OFOI

WORKING IN A PROJECT: IT CONNECTIVITY

For projects that involve a higher level of IT coordination; the IT connectivity function can play a vital role in communicating to the IT project team what equipment is connected to the network.

The equipment specifications for each piece of equipment indicate what equipment requires an IT connection or if an IT connection is optional. This feature allows the planner to go one step further and designate which IT closet the equipment is connected to help coordinate the required IT infrastructure. Follow the steps below to connect a piece of equipment to an IT closet or data center:

Step 1: Create a department and select the Department Type as 'MIS' (Management Information Systems)

Step 2: Within the new MIS department, create a room where the IT infrastructure will reside (i.e. switches routers). Multiple rooms may be created as needed.

Step 3: Go back to the room which has equipment to be connected and click on the IT connectivity tab.

Step 4: Select the Add Box icon (Boxes are the plates where the data, analog jacks etc reside and allow connection to equipment within the room)

Step 5: Name the Box (Required); boxes are typically named by location (i.e. ceiling, north wall)

Step 6: Indicate the number of jacks permitted in each box

Step 7: Select the default MIS room where the equipment connections will terminate.

Add Department

Dept Name:

Phase:

Dept Area: (SF) Type:

Contact Name:

Phone: Email:

Comment:

Room Detail (ICU/200)

Department:

Room No: Room Name:

Wayfinding No: Wayfinding Name:

Comment:

Date Added: 04/09/2015
Added By: dkromis@hsginc.org
Total Budget: \$85,671.87
PO Total: \$35,000.00
+/-: \$0.00

Equipment Inventory IT Connectivity

Box no	Description	Default MIS Room	Allowed Jacks	Open inserts	Jack Connections(Connected Equipment)
1	Headwall	IDF - 210	2	0	JCK0001-Jack, CAT 6(MON0060-Monitor Mounting Arm, Variable height) JCK0001-Jack, CAT 6(SPARE)

Add Box

Description:

Max. Jack Connections: Default MIS Room:

Current Jacks

Add jacks to box

Name/Code like: Search

Code	Description	Jack Number
JCK0002	Jack, Analog	<input type="text"/>
JCK0001	Jack, CAT 6	<input type="text"/>

WORKING IN A PROJECT: IT CONNECTIVITY (Cont'd)

Step 8: Add the appropriate jacks to each box (Note: planner can not add more jacks then the maximum connections)

Step 9: Select the equipment in room to connect to each jack or the planner can elect to leave jacks as spares for future planning.

The connected equipment is now visible in the corresponding MIS room which aides the IT infrastructure team in planning for the appropriate equipment to support the project.

This process can be repeated to connect equipment between MIS rooms (i.e. switch panels to data centers)

Edit Box

Description:

Max. Jack Connections: **Default MIS Room:**

Current Jacks

Code	Description	Jack Number	Connected Equipment
JCK0001	Jack, CAT 6	<input type="text"/>	MON0060-Monitor Mounting Arm, Variable height ✖
JCK0001	Jack, CAT 6	<input type="text"/>	--spare-- ✖

Add jacks to box

Name/Code like:

Code	Description	Jack Number
JCK0002	Jack, Analog	<input type="text"/> +
JCK0001	Jack, CAT 6	<input type="text"/> +

Room Detail (IS/IDF)

Department:

Room No: **Room Name:**

Wayfinding No: **Wayfinding Name:**

Comment:

Date Added: 04/09/2015

Added By: dkromis@hsginc.org

Total Budget:

PO Total:

+/-:

Equipment Inventory **Connected Equipment** **IT Connectivity**

	Phase	Department	Room Number	Room Name	Box No	Box Name	Jack Code	Jack Name	Jack Number	Equipment
<input type="checkbox"/>	Phase Test 1	ICU	200	ICU 1	1	Headwall	JCK0001	Jack, CAT 6		MON0060-Monitor Mounting Arm, Variable height
<input type="checkbox"/>	Phase Test 1	ICU	200	ICU 1	1	Headwall	JCK0001	Jack, CAT 6		

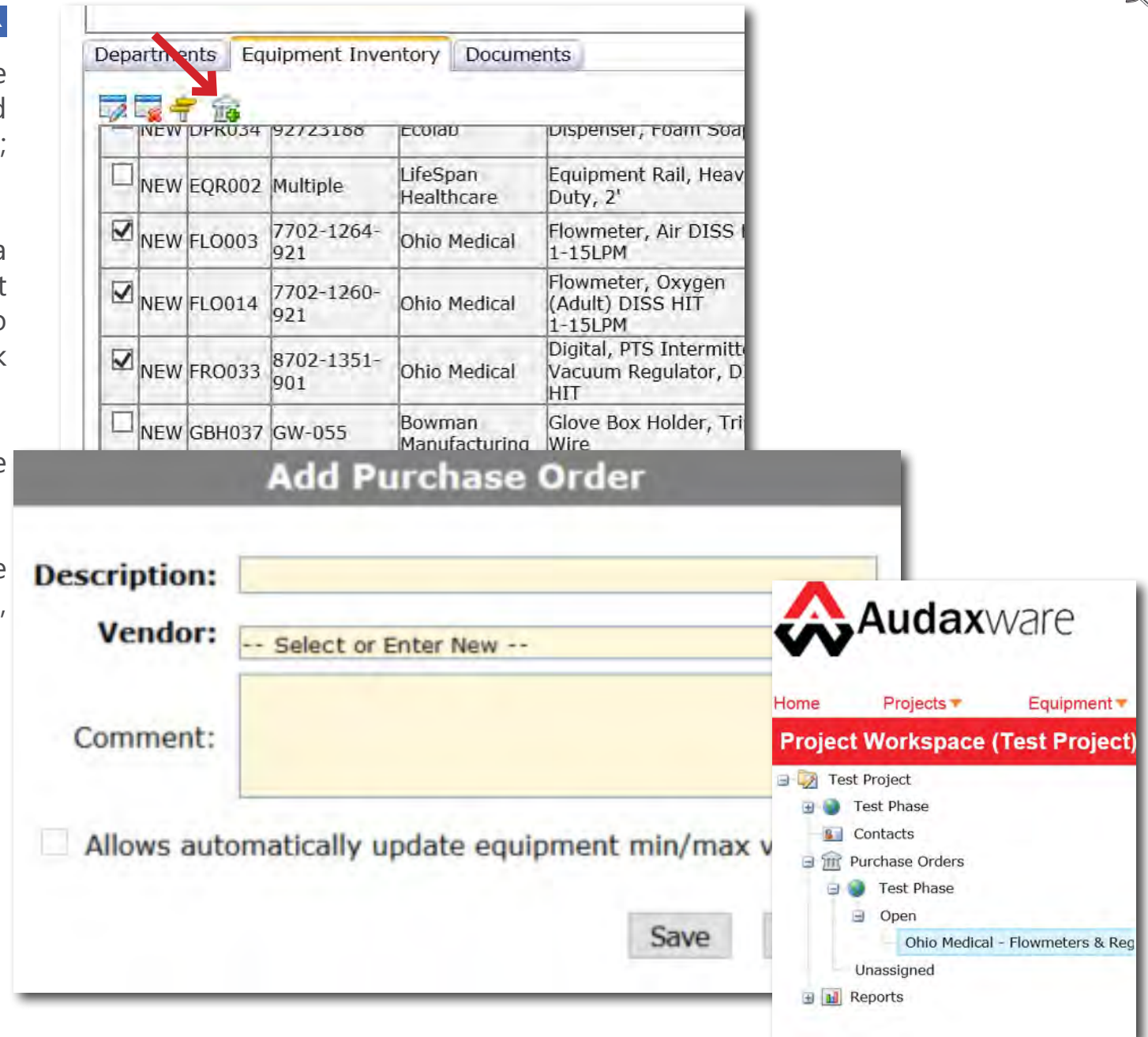
PURCHASING PROCESS: OPENING A PURCHASE ORDER

Select the Phase, Department or Room in the tree view. Locate the equipment item(s) is to be purchased and click on the 'Add to Quote/PO' button. Don't worry about missing equipment; equipment can be added to open purchase orders.

A modal screen will appear where the planner will enter a description of the purchase order and select the vendor that the purchase order will be issued. HINT: it is good practice to include a specific description of the purchase order for quick reference in the tree view.

This open order will now display in the tree view under Purchase Order > Open.

In the event the user does not want to record this purchase in the database (i.e. pricing is not reflective of cost due to discount), the user may select the check box at the bottom.



The screenshot displays the Audaxware Planner interface. At the top, there are tabs for 'Departments', 'Equipment Inventory', and 'Documents'. Below these tabs is a table of equipment items. A red arrow points to the 'Add to Quote/PO' button (a green plus icon) in the table's header row.

	NEW	ID	QTY	DESCRIPTION	VENDOR	EQUIPMENT
	NEW	DPR034	92723188	ECORAD		Dispenser, Foam Soap
<input type="checkbox"/>	NEW	EQR002	Multiple	LifeSpan Healthcare		Equipment Rail, Heavy Duty, 2'
<input checked="" type="checkbox"/>	NEW	FLO003	7702-1264-921	Ohio Medical		Flowmeter, Air DISS 1-15LPM
<input checked="" type="checkbox"/>	NEW	FLO014	7702-1260-921	Ohio Medical		Flowmeter, Oxygen (Adult) DISS HIT 1-15LPM
<input checked="" type="checkbox"/>	NEW	FRO033	8702-1351-901	Ohio Medical		Digital, PTS Intermittent Vacuum Regulator, DISS HIT
<input type="checkbox"/>	NEW	GBH037	GW-055	Bowman Manufacturing		Glove Box Holder, Tri Wire

Below the table is the 'Add Purchase Order' modal. It contains the following fields:

- Description:** A text input field.
- Vendor:** A dropdown menu with the text '-- Select or Enter New --'.
- Comment:** A large text area.
- ☐ **Allows automatically update equipment min/max v**
- Save** button

On the right side of the modal, there is a sidebar with the Audaxware logo and a tree view. The tree view shows the following structure:

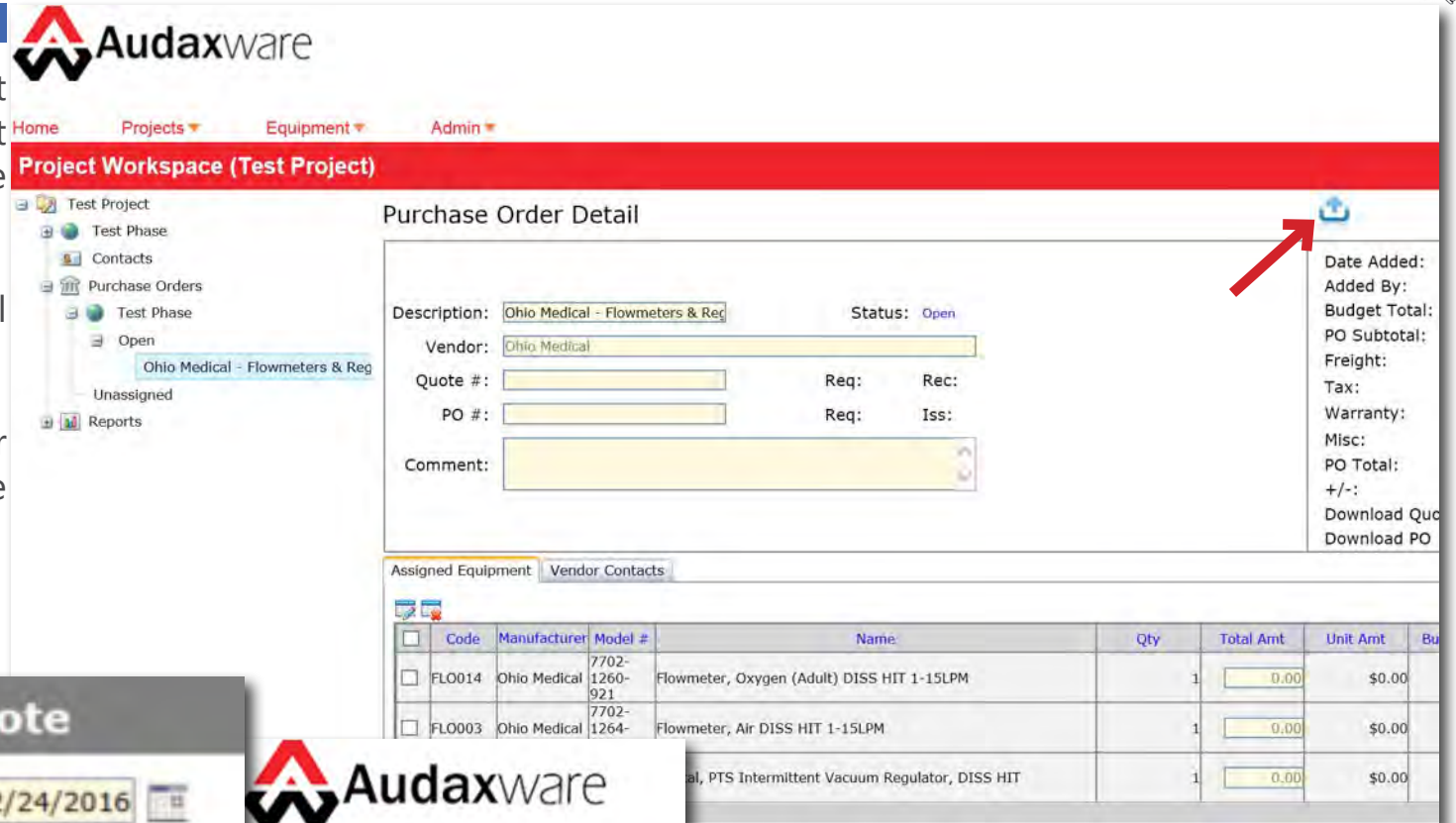
- Home
- Projects
 - Project Workspace (Test Project)
 - Test Project
 - Test Phase
 - Contacts
 - Purchase Orders
 - Test Phase
 - Open
 - Ohio Medical - Flowmeters & Reg
 - Unassigned
 - Reports

PURCHASING PROCESS: REQUESTING A QUOTE

After a purchase order has been opened, it is time to document that a quote has been requested. Simply click the 'Request Quote' button and edit the date the quote was requested. The date will default to current date.

It is important to enter accurate date information as this will display on equipment status reports.

The new purchase status will now display in the tree view under Purchase Order > Quote Requested. The status will also update on the user interface in the equipment inventory tab(s).



Purchase Order Detail

Description: Status: Open

Vendor:

Quote #: Req: Rec:

PO #: Req: Iss:

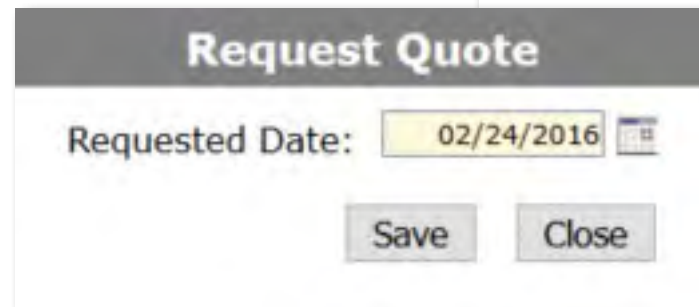
Comment:

Assigned Equipment

<input type="checkbox"/>	Code	Manufacturer	Model #	Name	Qty	Total Amt	Unit Amt	Bu
<input type="checkbox"/>	FLO014	Ohio Medical	7702-1260-921	Flowmeter, Oxygen (Adult) DISS HIT 1-15LPM	1	0.00	\$0.00	
<input type="checkbox"/>	FLO003	Ohio Medical	7702-1264-	Flowmeter, Air DISS HIT 1-15LPM	1	0.00	\$0.00	
<input type="checkbox"/>				al, PTS Intermittent Vacuum Regulator, DISS HIT	1	0.00	\$0.00	

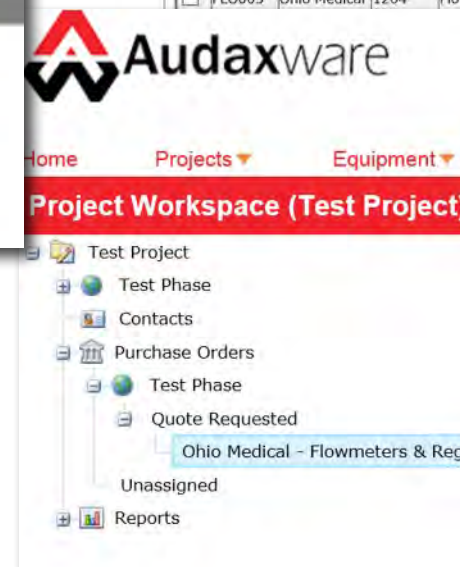
Summary:

- Date Added:
- Added By:
- Budget Total:
- PO Subtotal:
- Freight:
- Tax:
- Warranty:
- Misc:
- PO Total:
- +/-:
- Download Quote
- Download PO



Request Quote

Requested Date:



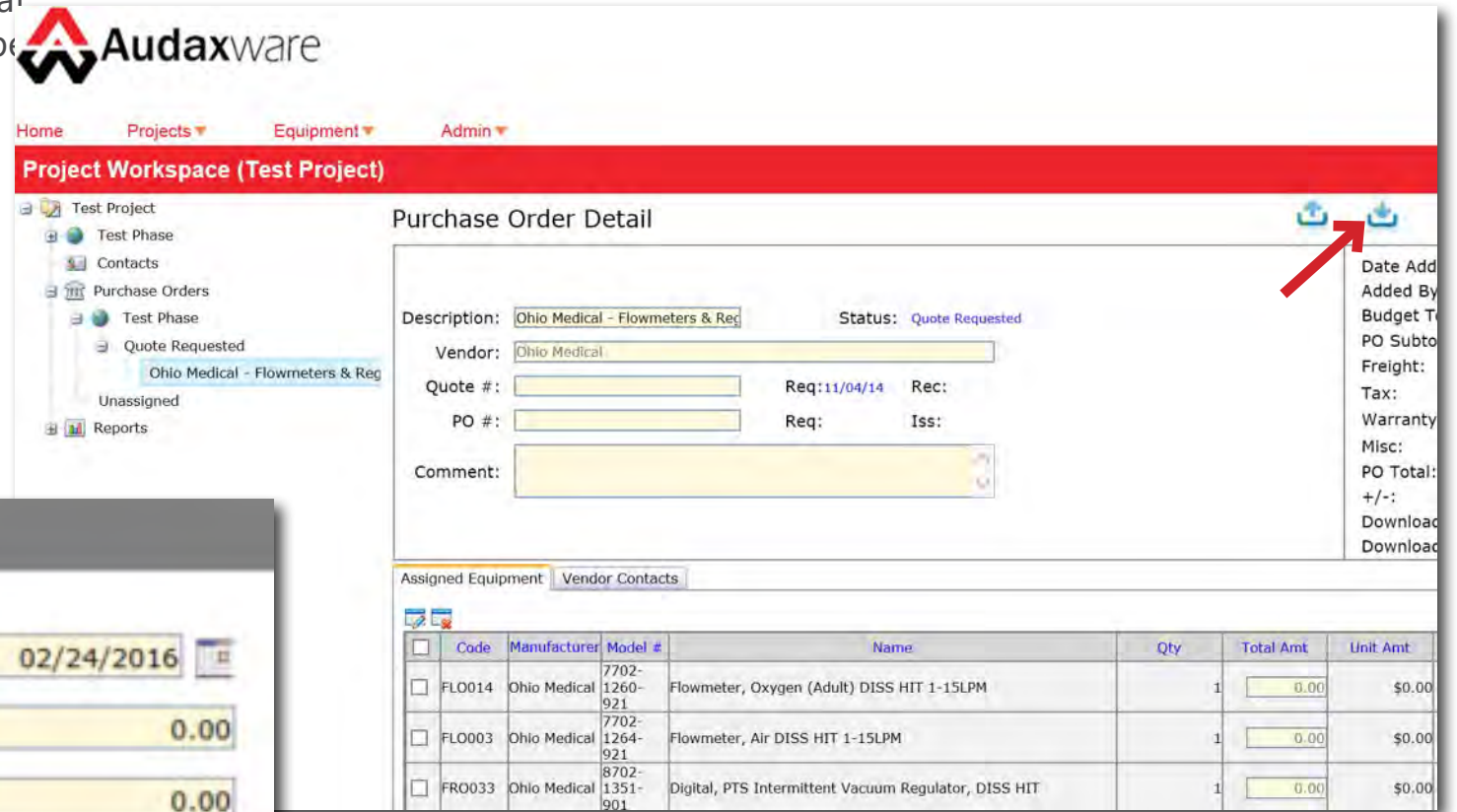
Project Workspace (Test Project)

- Test Project
 - Test Phase
 - Contacts
 - Purchase Orders
 - Test Phase
 - Quote Requested
 - Ohio Medical - Flowmeters & Reg
 - Unassigned
 - Reports

PURCHASING PROCESS: RECEIVING A QUOTE

After the planner has received the quote, the planner will click the 'Receive Quote' button. Enter the date the quote was received as well as the quote number from the vendor. Other information associated with the quote may also be entered at this time (i.e. freight cost). This additional information may be updated or entered at any time.

NOTE: A quote number is required but recommended.



Purchase Order Detail

Description: Status: Quote Requested

Vendor:

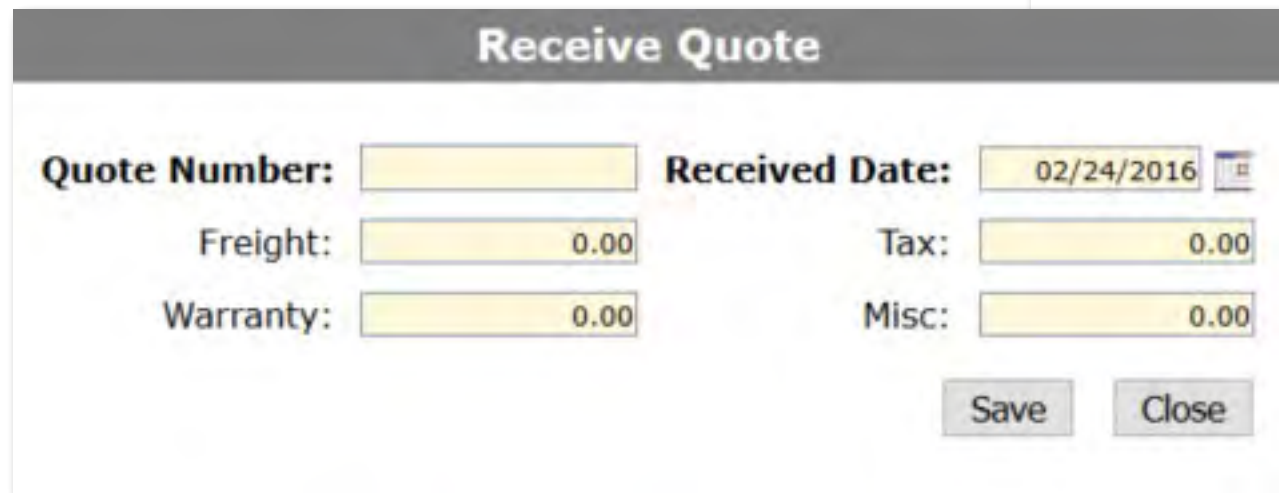
Quote #: Req: 11/04/14 Rec:

PO #: Req: Iss:

Comment:

Assigned Equipment

<input type="checkbox"/>	Code	Manufacturer	Model #	Name	Qty	Total Amt	Unit Amt
<input type="checkbox"/>	FLO014	Ohio Medical	7702-1260-921	Flowmeter, Oxygen (Adult) DISS HIT 1-15LPM	1	0.00	\$0.00
<input type="checkbox"/>	FLO003	Ohio Medical	7702-1264-921	Flowmeter, Air DISS HIT 1-15LPM	1	0.00	\$0.00
<input type="checkbox"/>	FRO033	Ohio Medical	8702-1351-901	Digital, PTS Intermittent Vacuum Regulator, DISS HIT	1	0.00	\$0.00



Receive Quote

Quote Number:

Received Date:

Freight:

Tax:

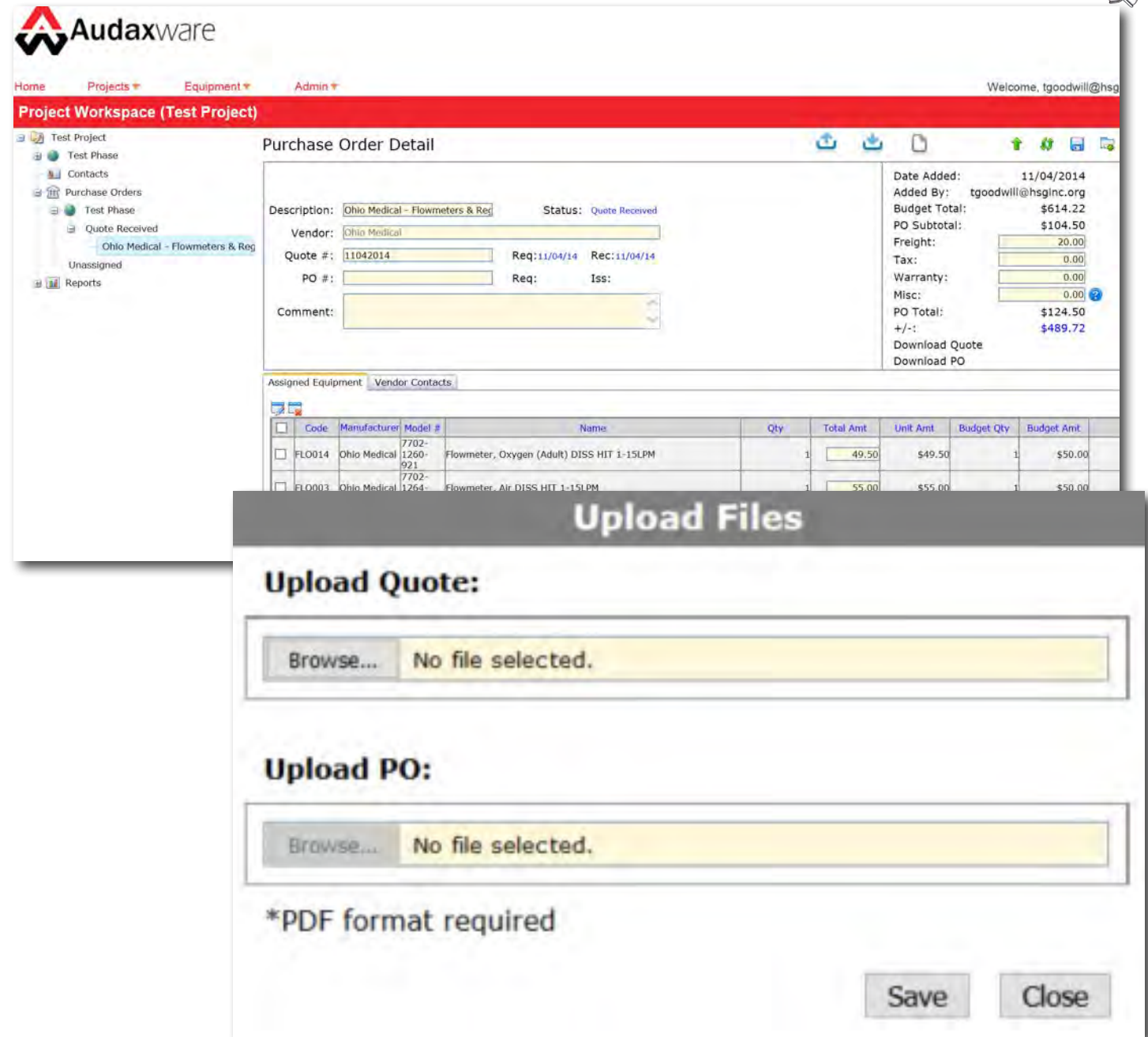
Warranty:

Misc:

PURCHASING PROCESS: RECEIVING A QUOTE (Cont'd)

Once the quote received date and quote number is saved the quote amount fields will open for data entry. Enter the total amount of each piece of equipment, Audaxware will calculate unit cost. Don't forget to enter any applicable freight, tax, or warranty costs. The misc. cost field is intended for costs that are not directly associated with equipment. These costs will be applied to contingency expenses. The PO total will update as information is entered as well as the budget delta for the equipment. It is recommend to upload the vendor quotes for future reference by clicking on the 'Upload Files'. The purchase status will update in the tree view as 'Quote Received'.

NOTE: The information entered in this window will update the client database to reflect recent purchases and update the budget for the applicable equipment.



Audaxware

Home Projects Equipment Admin Welcome, tgoodwill@hsg

Project Workspace (Test Project)

Test Project
Test Phase
Contacts
Purchase Orders
Test Phase
Quote Received
Ohio Medical - Flowmeters & Reg
Unassigned
Reports

Purchase Order Detail

Description: Ohio Medical - Flowmeters & Reg Status: Quote Received

Vendor: Ohio Medical

Quote #: 11042014 Req: 11/04/14 Rec: 11/04/14

PO #: Req: Iss:

Comment:

Date Added: 11/04/2014
Added By: tgoodwill@hsginc.org
Budget Total: \$614.22
PO Subtotal: \$104.50
Freight: 20.00
Tax: 0.00
Warranty: 0.00
Misc: 0.00
PO Total: \$124.50
+/-: \$489.72
Download Quote
Download PO

Assigned Equipment Vendor Contacts

	Code	Manufacturer	Model #	Name	Qty	Total Amt	Unit Amt	Budget Qty	Budget Amt
<input type="checkbox"/>	FLO014	Ohio Medical	7702-1260-921	Flowmeter, Oxygen (Adult) DISS HIT 1-15LPM	1	49.50	\$49.50	1	\$50.00
<input type="checkbox"/>	FLO003	Ohio Medical	7702-1264-	Flowmeter, Air DISS HIT 1-15LPM	1	55.00	\$55.00	1	\$50.00

Upload Files

Upload Quote:

Browse... No file selected.

Upload PO:

Browse... No file selected.

*PDF format required

Save Close

PURCHASING PROCESS: REQUEST PURCHASE ORDER

After all of the quote information is entered and the purchase order has been submitted to the purchasing department it is important to record the date the purchase order was requested by clicking the 'Request PO' button. A modal will appear at which point the planner can enter the applicable date as well as a purchase order requisition number if applicable.


This purchase status will then update in the tree view under Purchase Order > PO Requested.

Request PO

Requisition No.:

Requested Date:

Save Close



Home Projects Equipment Admin

Project Workspace (Test Project)

- Test Project
 - Test Phase
 - Contacts
 - Purchase Orders
 - Test Phase
 - Quote Received
 - Ohio Medical - Flowmeters & Reg
 - Unassigned
 - Reports

Purchase Order Detail

Description: Status: Quote Received

Vendor:

Quote #: Req: 11/04/14 Rec: 11/04/14

PO #: Req: Iss:

Comment:

Assigned Equipment Vendor Contacts

	Code	Manufacturer	Model #	Name	Qty	Total Amt	Unit Amt
<input type="checkbox"/>	FLO014	Ohio Medical	7702-1260-921	Flowmeter, Oxygen (Adult) DISS HIT 1-15LPM	1	49.50	\$49.50
<input type="checkbox"/>	FLO003	Ohio Medical	7702-1264-921	Flowmeter, Air DISS HI		55.00	\$55.00
<input type="checkbox"/>	FRO033	Ohio Medical	8702-1351-901	Digital, PTS Intermitt		0.00	\$0.00



Home Projects Equipment

Project Workspace (Test Project)

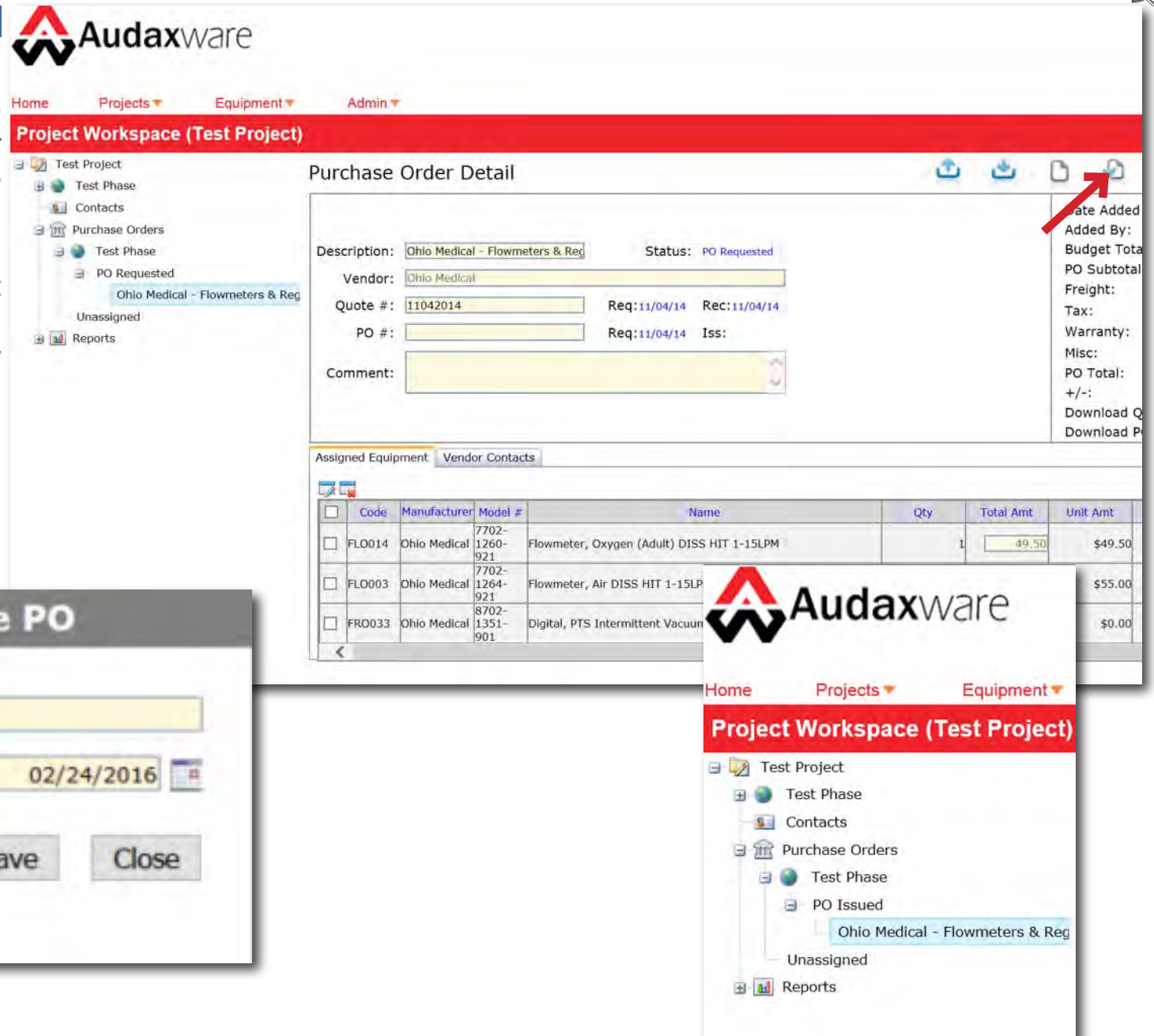
- Test Project
 - Test Phase
 - Contacts
 - Purchase Orders
 - Test Phase
 - PO Requested
 - Ohio Medical - Flowmeters & Reg
 - Unassigned
 - Reports

PURCHASING PROCESS: PURCHASE ORDER ISSUED

Once the purchase order has been issued to the vendor it is time to complete the purchase status update by clicking the 'Issue PO' button. A pop-up screen will appear and the planner should record the date on the purchase order. NOTE: a purchase order number is required.

The freight, tax, warranty and/or misc. costs can be updated at any point (i.e. when actual costs are incurred for FOB deliveries). Once this step is complete, the purchase status in the tree view will reflect Purchase Order > PO Issued.

As with the Quote Received process; the Purchase Order can be uploaded to Audaxware for future reference.



Audaxware

Home Projects Equipment Admin

Project Workspace (Test Project)

Test Project

- Test Phase
- Contacts
- Purchase Orders
 - Test Phase
 - PO Requested
 - Ohio Medical - Flowmeters & Reg
 - Unassigned
 - Reports

Purchase Order Detail

Description: Ohio Medical - Flowmeters & Reg Status: PO Requested

Vendor: Ohio Medical

Quote #: 11042014 Req: 11/04/14 Rec: 11/04/14

PO #: Req: 11/04/14 Iss:

Comment:

Assigned Equipment

	Code	Manufacturer	Model #	Name	Qty	Total Amt	Unit Amt
<input type="checkbox"/>	FLO014	Ohio Medical	7702-1260-921	Flowmeter, Oxygen (Adult) DISS HIT 1-15LPM	1	\$49.50	\$49.50
<input type="checkbox"/>	FLO003	Ohio Medical	7702-1264-921	Flowmeter, Air DISS HIT 1-15LP			\$55.00
<input type="checkbox"/>	FRO033	Ohio Medical	8702-1351-901	Digital, PTS Intermittent Vacuum			\$0.00

Receive PO

PO Number:

Received Date: 02/24/2016

Save Close

Audaxware

Home Projects Equipment

Project Workspace (Test Project)

Test Project

- Test Phase
- Contacts
- Purchase Orders
 - Test Phase
 - PO Issued
 - Ohio Medical - Flowmeters & Reg
 - Unassigned
 - Reports

PURCHASE STATUS

At any point during the purchasing process, the status of equipment will be reflected in the 'Equipment Inventory' tab. For example, the graphic to the right reflects several PO's as 'PO Issued' and the associated PO Quantity, PO amount, and the PO Delta. The buyout delta indicates to the planner how much over or under the budget amount the equipment is. If the equipment was purchased over the budgeted amount the row will be highlighted red.

Department Detail (Dental)

Department Name:
Type:

Dept Area:
Phase:

Contact Name:

Phone:
Email:

Comment:

Date Added: 01/23/2014
Added By: tgoodwill@hsginc.org
Total Budget: \$438,886.24
Projected Cost: \$379,549.77
PO Total: \$379,549.77
Planned Budget Delta: \$59,336.47

Rooms
Equipment Inventory

	Resp	Type	Code	CAD ID	Model No.	Model Name	Manufacturer	Description	Status	PO Status	Planned Qty	lease qty	dnp qty	Net New	Budget	PO qty	PO amt	PO delta	Spec	Option	Color
<input type="checkbox"/>	OFCI(5)	New(5)	BIN0011	BIN011(5)	QLP-3661		Quantum	Louvered Panel, 36" x 61"	Approved (5)	PO Issued (5)	5	0	0	5	\$675.00	5	\$915.00	(\$240.00)			●
<input type="checkbox"/>	OFCI(5)	New(5)	BIN0012	BIN012(5)	QLP-3619		Quantum	Louvered Panel, 36" x 19"	Approved (5)	PO Issued (5)	5	0	0	5	\$250.00	5	\$265.00	(\$15.00)			●
<input type="checkbox"/>	OFOI(5)	New(5)	BIN0013	BIN013(5)	Allowance		Unknown	Allowance - Storage Bins	Approved (5)	PO Issued (5)	5	0	0	5	\$2,000.00	5	\$1,540.20	\$459.80			
<input type="checkbox"/>	OFCI(8)	New(8)	BKT0013	BKT013(8)	P010901		PDI	Bracket, Sani-Wipe, Universal 3 in 1	Approved (8)	PO Issued (8)	8	0	0	8	\$400.00	8	\$176.32	\$223.68			
<input type="checkbox"/>								AED Wall Box, Semi-Processed with	Approved	PO											

REPORTING: ROOM REPORTS

Room reports are generated by clicking on the print icon at the top right of the screen for a PDF version or the Excel icon for for an editable version. The report will be filtered based on the project hierarchy the planner is in at the time the report is generated. For example, if the report is generated when a department is selected in the tree view, the report will include all rooms with in the department.

The report is compiled with a summary table at the beginning and then each room displayed separately. The rooms are listed alphanumerically by room name. NOTE: Rooms are combined when the room name and the equipment scheduled are identical as referenced in the example to the right. The equipment listed applies to each room.

Also included in the report is the manufacturer name, model number and required utilities and support. Utility abbreviations are defined in the cover page of the report.

test20150407
Phase Test 1
Equipment Summary for Department: CSP
Cost Center: All Cost Centers

Department Totals: Equipment

Resp	Code	CAD ID	Equipment	Planned Qty	Lease Qty	DNP Qty	Net New	PO Qty	Utilities & Support						
									E	D	H	P	G	B	S
OFCI	CAB0002	CAB002	Cabinet, Flammable Liquids, 4 Gallon Manual Closing Eagle(1904)	1	0	0	1	0	-	-	-	-	-	-	-
OFCI	CAB0056	CAB056	Cabinet, Supply Stanley Healthcare (Innerspace)(5136DGA-VC)	1	0	0	1	0	-	-	-	-	-	-	-
OFCI	CAB0112	STO008	Soaps Storage, 10 Large Diameter Stanley Healthcare (Innerspace)(3850/3850 Series)	1	0	0	1	0	Y	-	-	-	-	Y	-
OFCI	COF0001	COF001	Coffee Maker, Single Burner Pour Over Bunn(Model Selection/WF17-1)	1	0	0	1	0	Y	-	-	-	-	-	-
OFCI	CRT0183	CRT183	Cart, Sterile Processing Transport Steris(FD61-700)	1	0	0	1	0	-	-	-	-	-	-	-
OFCI	DPR0033	DPR033	Dispenser, Hand Sanitizer Ecolab(Selection Required/Nexa Classic)	1	0	0	1	0	-	-	-	-	-	0	-
OFCI	EQP0002	FAC002	Equipment Allowance -none-	1	0	0	1	1	-	-	-	-	-	-	-
OFCI	EQP0003	FAC009	Allowance: Equipment Deinstallation / Disposal -none-	2	0	0	2	0	-	-	-	-	-	-	-
OFCI	EQP0007	FAC013	Flowmeter, Air Ohmeda Diamond 1-15LPM	1	0	0	1	0	-	-	-	-	-	-	-

Welcome, dkromis@hsginc.org
Logout

08/15/2013
jjack
\$3,674,656.15
et: \$3,804,205.78
\$2,230,146.20

REPORTING: EQUIPMENT BY ROOM REPORTS

Equipment by room reports are an excellent tool when deploying equipment or the planner needs to reference the distribution of equipment in a project.

This report is generated from the tree view. The applicable filters are applied and the equipment selected for the report. More than one equipment can be selected by holding down the ctrl key as equipment is selected.

The report is viewed on the screen and can be downloaded in various formats or printed in hard copy.

Equipment by Room

Select Phase:

Select Department:

Select Equipment:

- All--
- AID039 - Regular Transfer Board
- AID052 - Lateral Air Transfer System, Bariatric
- ANM017 - Anesthesia Machine
- BOT002 - Surgical Robot System
- CAB054 - Cart, Supply
- CAB062 - Cabinet Storage, Stainless
- CAM001 - Camera Head, Surgical Light
- CLK006 - Clock, 6-digit display flush mount,
- CLK014 - Clock, Round 10", Quiet Sweep Second Hand
- COF015 - Coffee Maker, Double Burner Pour Over
- COL016 - Boom, Equipment / Anesthesia
- CRT068 - Cart, Anesthesia, Aluminum, 6 Drawer
- CRT081 - Cart, Procedure, Aluminum, 6 Drawer, 27", Solid Color (Beige)
- CRT121 - Cart, Cast, Painted Steel, 8 Drawer Delux
- CRT140 - Cart, Catheter Supply
- CRT141 - Cart, Supply Bin Storage
- CRT158 - Cart, ECMO
- CRT163 - Cart, Emergency, 4 Drawer Steel
- CRT177 - Cart, Video Equipment
- CRT179 - Cart, Janitorial
- CRY007 - Dewar, Liquid Nitrogen, 30 Liter
- CRY008 - Dewar Base

Select Cost Center:

Run Report

- HOSPITAL LEVEL 7
- MOCKUP
- Contacts
- Purchase Orders
- Reports
 - Equipment Book
 - Budget Summary
 - Equipment Status
 - Equipment By Room

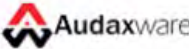
REPORTING: EQUIPMENT BY ROOM REPORTS (Cont'd)

This report includes general information about the selected equipment as well as utilities and support requirements. The table indicates in what locations the equipment is scheduled as well as quantity in each location.

Equipment by Room

[Back](#)

1 of 2
Page Width
Find | Next



Seton Medical Center at UT
Phase: HOSPITAL LEVEL 2
Department: LVL 2 - SURGERY
All Cost Centers

CLK006 - Clock, 6-digit display flush mount,
Primex Wireless: XRA1Y202F-1
Highly visible 5 or 7-segment LED digits; 12- or 24-hour time display; Alternating time and date display option; 8-hour power outage memory backup; Display dimmer control with 75%, 50% and 25% capabilities.

UOM	HxWxD(in)	HxWxD(m)	Weight(lb)	Weight(kg)	E	D	H	P	G	B	S
ea.	6.25 17.00 2.60	15.88 43.18 6.60	3.40	1.54	Y	--	--	--	--	Y	--
Logistics	Phase	Department	Room No	Room Name	Total	Lease	DNP	Net New			
OFCI	HOSPITAL LEVEL 2	LVL 2 - SURGERY	24048	OR 1 (TRAUMA)	1	0	0	1			
OFCI	HOSPITAL LEVEL 2	LVL 2 - SURGERY	24052	OR 2 (PLASTICS)	1	0	0	1			
OFCI	HOSPITAL LEVEL 2	LVL 2 - SURGERY	24058	OR 3 (PLASTICS)	1	0	0	1			
OFCI	HOSPITAL LEVEL 2	LVL 2 - SURGERY	24062	OR 4 (GENERAL)	1	0	0	1			
OFCI	HOSPITAL LEVEL 2	LVL 2 - SURGERY	24072	OR 10 (HEART)	1	0	0	1			
OFCI	HOSPITAL LEVEL 2	LVL 2 - SURGERY	24084	OR 11 (ORTHO)	1	0	0	1			
OFCI	HOSPITAL LEVEL 2	LVL 2 - SURGERY	24086	OR 12 (ORTHO)	1	0	0	1			

REPORTING: EQUIPMENT STATUS REPORTS

The equipment status report is a list of equipment scheduled in the project per the selected filters. The report is generated from the tree view and viewed in the user interface which can be exported in various formats as well as printed to hard copy. The report can be sorted with respect to any column in the table. The report provides beneficial progress information to the planner.

The planner is able to select specific equipment as well as limit the available equipment for selection by the project phase or department. The planner may also select whether to use the default Audaxware codes or the alternate CAD ID's assigned by the planner.

Equipment by Room

Select Phase:
--All--

Select Department:
-- All --

Use CAD ID's:
☐

Select Equipment:
--All--

BIN0011 - Louvered Panel, 36" x 61"

BIN0012 - Louvered Panel, 36" x 19"

BIN0013 - Allowance - Storage Bins

BIO0001 - Allowance, Biomed Testing Equipment

BKT0011 - Bracket, Midmark IQ Vital Signs Wall Mount with Basket

BKT0013 - Bracket, Sani-Wipe, Universal 3 in 1

CAB0094 - AED Wall Box, Semi-Recessed with Alarm & Flashing Light

CHP0055 - Chair, Dental

CRT0149 - Cart, Utility 3 shelf Polyethylene

DFB0017 - Defibrillator, AED

DIA0034 - Diagnostic Set, Desk Top

DIA0057 - Diagnostic Set (transformer, ophthalmoscope, otoscope)

Home

Contacts

Purchase Orders

Reports

Equipment Book

Budget Summary

Equipment Status

Equipment By Room

Seton Medical Center at UT
Phase: HOSPITAL LEVEL 0
Department: LVL 0 - EMERGENCY
All Cost Centers

Resp	Code	Description	Budget Qty	Lease Qty	DNP Qty	Net New	PO Qty	Total Budget Amt	Total PO Amt	Buyout Delta	PO Status	PO # Comment	Vendor	Manufacturer	Model #
OFOI	BIN013	Allowance - Storage Bins	74	0	0	74	0	\$29,783.52	\$0.00	\$0.00	None (0)			Unknown	Allowance
OFCI	BKT001	Bracket, Monitor Channel,19"	54	0	0	54	53	\$2,997.00	\$1,923.90	\$991.10	None (0)Quote Rec (53)		GE Healthcare	GCX	WC-0002-04
OFOI	COF015	Coffee Maker, Double Burner Pour Over	2	0	0	2	0	\$480.00	\$0.00	\$0.00	None (0)			Bunn	392
OFOI	CRT084	Cart, Isolation Package, Steel, 4 Drawer (Yellow)	2	0	0	2	0	\$2,700.00	\$0.00	\$0.00	None (0)			Armstrong Medical	AKL-Y-400IP

Run R



REPORTING: BUDGET SUMMARY REPORTS

Budget Summary Reports are an excellent tool for keeping executives and supervisors up to date on the status and progress of a project. The report includes the applicable filters, budget and cost data for each level of hierarchy as well as procurement graphs as a graphical representation of project progress. This report is generated from the tree view.

Budget Summary

Select Phase:

Select Department:

Select Cost Center:

Run Report

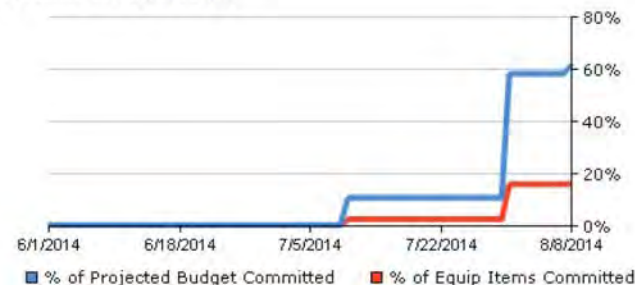
Medical Equipment Report - Budget Summary

Client: Seton Network Facilities
 Client Project No: 13022
 Project Name: Seton Medical Center at UT
 Planner Project: 2013031
 Cost Center: All Cost Centers

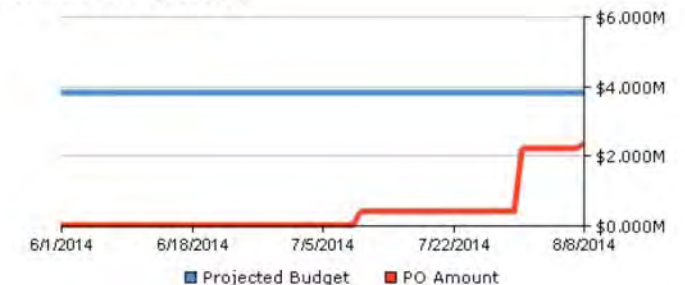
Phase	Budget		Projected Cost	% Committed	Progress	
	Planned				PO's	PO Delta
HOSPITAL LEVEL 0	\$ 3,674,656		\$ 3,804,206	59%	\$ 2,230,146	\$ 129,550
Phase Subtotals	\$ 3,674,656		\$ 3,804,206	59%	\$ 2,230,146	\$ 129,550

Department	Budget		Projected Cost	% Committed	Progress	
	Planned				PO's	PO Delta
LVL 0 - EMERGENCY	\$ 3,674,656		\$ 3,804,206	59%	\$ 2,230,146	\$ 129,550
Dept Subtotals	\$ 3,674,656		\$ 3,804,206	59%	\$ 2,230,146	\$ 129,550

Procurement Progress (%)



Procurement Progress (\$)

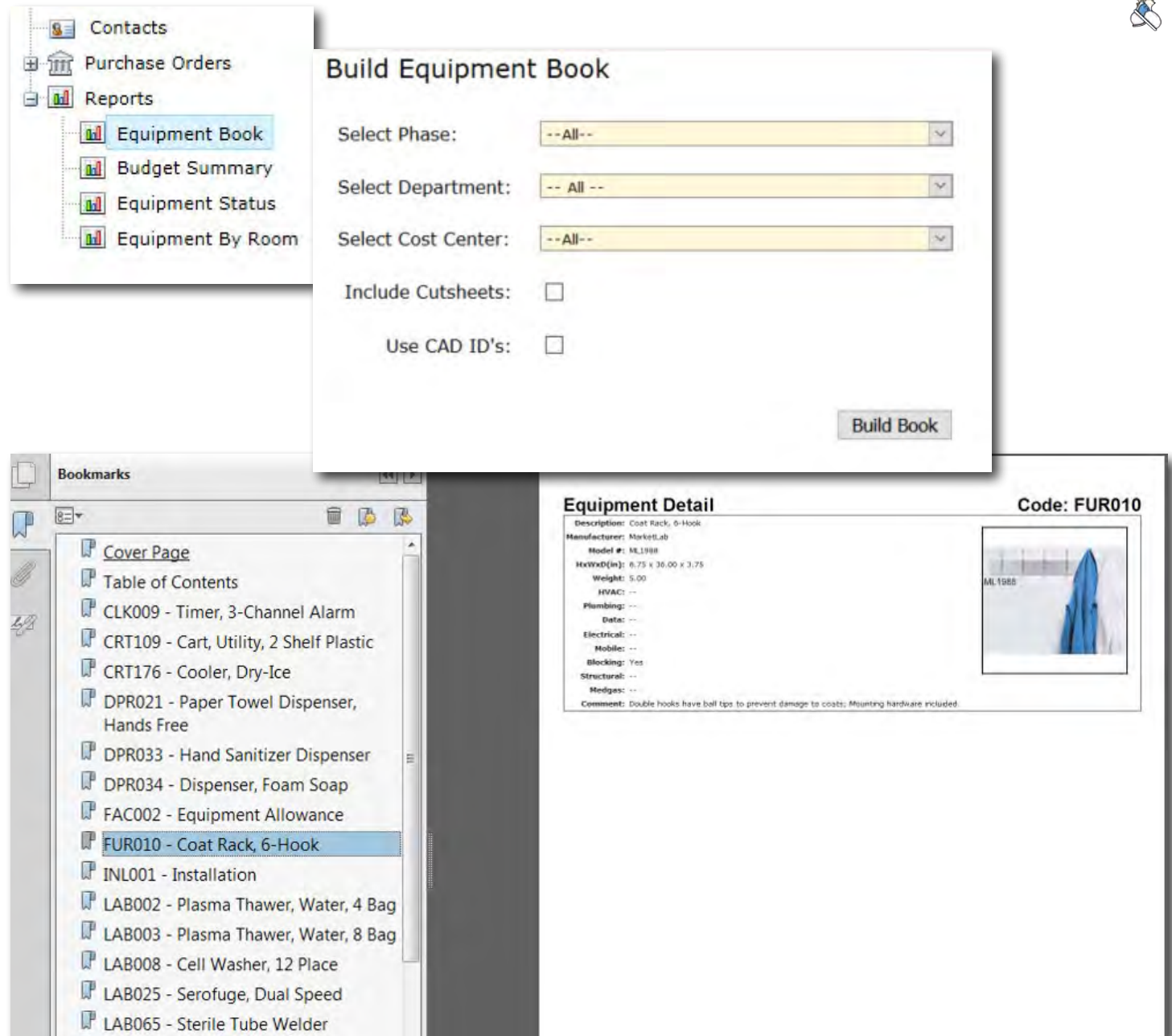


REPORTING: EQUIPMENT BINDER REPORTS

An equipment binder is the collection of equipment specifications for the scheduled equipment in the project. The planner can filter the binder to a specific location, select whether the manufacturer cut sheets should be included, and select if the standard Audaxware codes should be utilized or the alternate CAD ID's established by the planner.

NOTE: including the manufacturer cut sheets typically generates a much larger file. Cut sheets should only be included when necessary.

Cut sheet covers include the basic equipment information including utility and support requirements, comments, and a picture of the equipment for quick visual reference. The PDF binder includes bookmarks which enable to a user to quickly navigate the document.



The screenshot displays the Audaxware Planner interface. On the left, a 'Bookmarks' pane lists various equipment items, with 'FUR010 - Coat Rack, 6-Hook' selected. In the center, a 'Build Equipment Book' dialog box is open, allowing users to filter the equipment book by phase, department, and cost center. The dialog also includes checkboxes for 'Include Cutsheets' and 'Use CAD ID's'. On the right, the 'Equipment Detail' view for 'FUR010' is shown, providing a comprehensive overview of the equipment's specifications, including its description, manufacturer, model, dimensions, weight, and various attributes like plumbing, electrical, and blocking. A small image of the coat rack is also displayed.

Build Equipment Book

Select Phase: -- All --

Select Department: -- All --

Select Cost Center: -- All --

Include Cutsheets: ☐

Use CAD ID's: ☐

Build Book
























Equipment Detail Code: FUR010

Description: Coat Rack, 6-Hook
 Manufacturer: MarketLab
 Model #: ML1988
 HxWxD(in): 6.75 x 36.00 x 3.75
 Weight: 5.00
 HVAC: --
 Plumbing: --
 Data: --
 Electrical: --
 Mobile: --
 Blocking: Yes
 Structural: --
 Medgas: --
 Comment: Double hooks have ball tips to prevent damage to coats; Mounting hardware included.

Bookmarks

- Cover Page
- Table of Contents
- CLK009 - Timer, 3-Channel Alarm
- CRT109 - Cart, Utility, 2 Shelf Plastic
- CRT176 - Cooler, Dry-Ice
- DPR021 - Paper Towel Dispenser, Hands Free
- DPR033 - Hand Sanitizer Dispenser
- DPR034 - Dispenser, Foam Soap
- FAC002 - Equipment Allowance
- FUR010 - Coat Rack, 6-Hook**
- INL001 - Installation
- LAB002 - Plasma Thawer, Water, 4 Bag
- LAB003 - Plasma Thawer, Water, 8 Bag
- LAB008 - Cell Washer, 12 Place
- LAB025 - Serofuge, Dual Speed
- LAB065 - Sterile Tube Welder

AUDAXWARE ICONS

	Add entry		Save current changes to Project, Phase, Dept, Room Detail information		Display locations for selected equipment
	Edit item(s) selected		Add Phase, Dept, or Room; depends on current view what is added		AutoCAD block; click to download
	Delete item(s) selected		Delete current Phase, Dept, or Room		Revit file; click to download
	Relocate item(s) selected		Copy room		Cut sheet for equipment; click to download
	Add item(s) selected to PO		Apply template to current room		Cut sheet cover for equipment; click to download. No manufacturer documentation.
	Edit which columns are visible in the table		Create template to current room		Equipment option/color selection complete
			Generate room by room report in PDF format		Equipment option/color selection needed
			Download room by room report in excel format		Equipment option/color selection partially complete
			Copy equipment from another project, phase, or department		



DEFINITIONS

Referenced below are common definitions and acronyms utilized in Audaxware.

CAD ID: Alternate CAD ID assigned to equipment by planner

Code: Default Audaxware equipment code

dnp qty (Do Not Purchase): Can be utilized for numerous reasons; for example, if the planner wants to keep a record that the equipment was scheduled in the project but no longer wants to account for the equipment in the budget. Note: equipment budget for items quantified as “dnp” are automatically zeroed.

Net new: The net new quantity scheduled for purchase

Planned Qty: (The total number of items in the project regardless of type, lease etc.

PO Delta: The difference between the purchase price and the budget amount

PO STATUS (Purchase Order Status): Current purchasing stage of the equipment (Open, Quote Requested, Quote Received, PO Requested, PO Received).

Resp(Responsibility): Identifies who is responsible for procuring and installing equipment. “EX” prefix indicates the equipment is existing

OFOI - Owner Furnish Owner Install	EXOI - Existing Equipment Owner Relocate
OFCI - Owner Furnish Contractor Install	EXCI - Existing Equipment Contractor Relocate
OFVI - Owner Furnish Vendor Install	EXVI - Existing Equipment Vendor Relocate
CFCI - Contractor Furnish Contractor Install	

Status: Equipment status (Approved, Plan, Received, Completed)

Type: New or Existing equipment



Bold SaaS solutions empowering the client to plan projects with real time information and manage projects throughout the life cycle

For More Information Contact [Audaxware](#)