

@Par Server Requestor Guide TrackIT @Par version 2.6.3

**This documentation is intended
for use by
TrackIT Requestors**

**Revision 2
January 12, 2007**

Change Document

Revision	Date	Description of Change
1	7/23/06	Insert figure numbers for all illustrations.
2	01/12/07	Revise content/Replace Screen Captures to update to current release level.

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Introduction to @Par TrackIT

@Par has developed this product, **TrackIT**, to “track” three item types; Furniture, Equipment and Boxes. These items are generally not Stock Items but need to be maintained and have an audit trail.

TrackIT allows Requestors the ability to “order” an item from the Warehouse and have it delivered to their department. TrackIT will “track” the item from the Warehouse, to the Department, return to the Warehouse, and return to the location.

The MAJOR difference from TrackIT and other @Par products is that TrackIT **DOES NOT** interface with an organization's ERP system (PeopleSoft, Lawson, Meditech, etc.).

This allows the organization to design the data with their own Item scheme, Descriptions, etc.

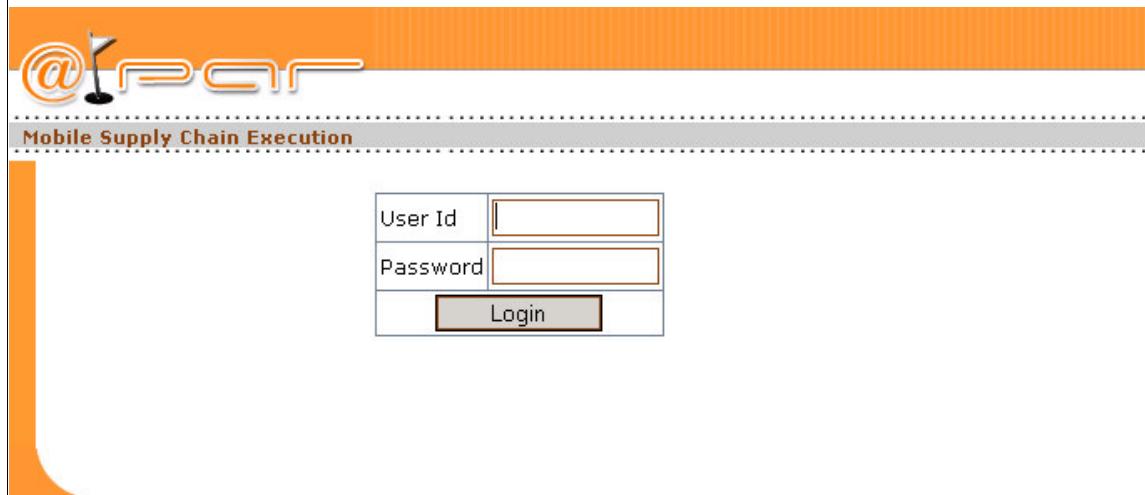
Before you can use the product, a Functional Manager will need to add you as a Requestor. They will provide you with a User login name and password.

To access the Requestor features, type in the following in your address bar on your Internet Explorer.

[Http:// yourserver/atpar/web/tkit_index.asp](http://yourserver/atpar/web/tkit_index.asp)

Logging in to Requestor Screen

When you connect as a **@Par Requestor**, the first screen that appears is the **Login** screen: **Figure 1**



The screenshot shows the @Par login interface. At the top is an orange header bar with the @Par logo. Below this is a grey navigation bar containing the text "Mobile Supply Chain Execution". The main content area is white and features a login form. The form consists of two input fields: "User Id" and "Password", each with a small cursor icon. Below these fields is a "Login" button. The entire form is enclosed in a thin border.

Figure 1

You will use the User Id and Password provided to you by the Functional Manager/ Server User to login to the Requestor screen.

Click the **Login** button and you will see the following screen: **Figure 2**



The screenshot shows the @Par Requestor screen after a successful login. The header is orange with the @Par logo. Below this is a grey navigation bar containing the text "Mobile Supply Chain Execution". The main content area is white and features a navigation menu with links: "Create Request", "Request Status", "User Profile", "View Cart", and "Logout". Below the menu is a welcome message: "Welcome NURSE CATCHALL".

Figure 2

Before you start the item request process, you should first **Select** the **User Profile** menu option from the top of the screen.

User Profile

The **User Profile** option is used by each Requestor to change *their* information in the system. If the @Par Administrator prefers to limit this access, they may change the “Allow user profile updation” feature in Product Parameters. If the @PAR Administrator has not checked this, you will not see this option available on the screen

After a Server User assigns a password to you, you should first login to this option so you can create your own password. This is important for security purposes: **Figure 3**

My Profile	
* User ID	RHATT
* Current Password	<input type="text"/>
* New Password	<input type="text"/>
* Re-enter Password	<input type="text"/>
* First Name	Rick
* Last Name	Hatt
Middle Initial	A
Email ID	<input type="text"/>
Phone	<input type="text"/>
Fax	<input type="text"/>
Pager	<input type="text"/>
Default Deliver Location	Any Office 1(Office 1) <input type="button" value="v"/>
<input type="button" value="Submit"/>	
* Mandatory	

Figure 3

Note: Items marked with a red asterisk are mandatory fields.

User ID – This is the only item that *can not* be modified. All other options can be changed by the requestor.

Current Password – Enter the password you use currently to log in to the Requestor screen.

New Password – Enter the new password you want to use now.

Re-Enter Password – Re-enter the New Password you just entered.

First Name – This defaults from the Server user setup, but if you need to modify it you may in this field.

Last Name - This defaults from the Server user setup, but if you need to modify it you may in this field.

Middle Initial – This is not mandatory, but is editable.

Email ID – This is not a mandatory field but you may enter your email address.

Phone – This is not a mandatory field but you may enter your phone number.

Fax – This is not a mandatory field but you may enter your fax number.

Pager – This is not a mandatory field but you may enter your pager number.

Default Deliver Location – This is an important field to have as it notes where you are located. If you move you will want to remember to change your location in this field. It defaults from the Server User setup.

Once you are satisfied with any and all changes, **Click** the **Submit** button to save changes.

Now you are ready to begin the item requesting process.

The next step is “Create Request”.

Create Request

This is the initial step in ordering an item for delivery.

Click the **Create Request** option at the top of the screen and you will receive the following screen: **Figure 4**

Figure 4

Search – Enter either the entire name or partial name of the Equipment Type you want to request.

Select Equipment Type – Use this drop down option to view and highlight the Equipment Type you want to request.

Go – Once you have an Equipment Type click this button.

Depending on what Equipment Type you select and what category that Equipment Type falls under, Equipment, Box or Furniture, will determine the screen that will appear next.

We will start with an Equipment Type that falls under the BOX category: **Figure 5**

ItemID	Item Description	Comments	Deliver Location	Needed by Date-Time	Estimated Return Date-Time	Available Select
86	Waste management records	No comments at this time	hospital	04/19/2006 12:00 PM	04/19/2006 12:00 PM	Yes

Previous | 1 | Next

Add To Cart

* Selected Items are already in cart

Figure 5

ItemID – This is a non editable field that denotes the Item ID number.

Item Description – This is a non editable field that denotes the Item description.

Comments – Comments entered upon Item creation.

Deliver Location – This is an editable field that defaults with the location found in your User Profile. You can use the drop down window to select another ship to or deliver to location.

Needed by Date/Time - This is an editable field used to let the system know the date and time the item is needed.

Estimated Return Date/Time - This is an editable field used to let the system know the date and time the item is expected for return.

Needed by – This is an editable date field that denotes the date you need the item by. You can either select the date using the calendar; enter the date in manually using the mm/dd/yyyy format.

Available – A non editable field that means either this item IS available to order or request or that it is unavailable to order or request. Please note that if it is NO in this column, the select column will be disabled and you will not be able to select it for ordering. (Please see the last screen: **Figure 5**)

Select – An editable check box field. If you want to choose the item and other information you need to click on this box.

When you are satisfied with your selections and want to add this item to your cart to order, simply **Click** the **Add to Cart** button: **Figure 6**

The screenshot shows a web interface titled "Cart View". At the top right is a "Continue" button. Below it is a table with the following columns: "Image", "ItemID", "Item Description", "Request Qty", "Deliver Location", "Needed By Date-Time", "Estimated Return Date-Time", and "Remove". The table contains one row with the following data: "Image" (a small icon), "ItemID" (86), "Item Description" (Waste management records), "Request Qty" (1), "Deliver Location" (hospital), "Needed By Date-Time" (04/19/2006 12:00 PM), "Estimated Return Date-Time" (04/19/2006 12:00 PM), and "Remove" (a checkbox). Below the table is an "Order Comments" text area. At the bottom right are three buttons: "Clear Cart", "Update Cart", and "Submit Request".

Image	ItemID	Item Description	Request Qty	Deliver Location	Needed By Date-Time	Estimated Return Date-Time	Remove
	86	Waste management records	1	hospital	04/19/2006 12:00 PM	04/19/2006 12:00 PM	<input type="checkbox"/>

Order Comments:

Clear Cart Update Cart Submit Request

Figure 6

You should see the item that you just selected appear with a new check box at the end of the line.

If you have multiple lines on this cart, and decide to just remove one item but retain the others you have requested, **Click** the **Remove** check box.

With the **Remove** check box checked, **Click** on the **Update Cart** button. This will remove just that item from the cart.

Clear Cart – Use this button if you have decided you don't want to order or request any items. The system WILL give you a warning message so you can change your mind.

Update Cart – This button can also be used if you modify a field and you want to save the changes. Make your changes and click this button.

Submit Request – If you are sure you have all your information and are ready to place this request, click this button.

Continue – Using this button allows you to continue to request other items on this cart.

The requestor can use the comments field to enter free form text.

Let's select the **Continue** button and see what the **Furniture** item screen looks like.

When you get back to the **Equipment Type** screen below: **Figure 7**

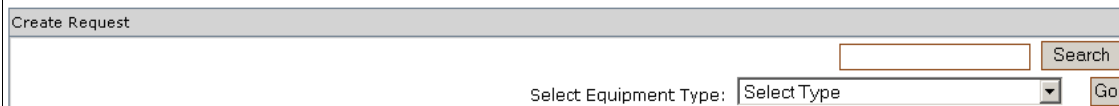


Figure 7 shows a web form titled "Create Request". It features a search bar with a "Search" button and a "Select Equipment Type" dropdown menu with a "Go" button. The dropdown menu is currently set to "Select Type".

Figure 7

.....ensure you select an item you know is a Furniture type. Now you should see the following screen: **Figure 8**

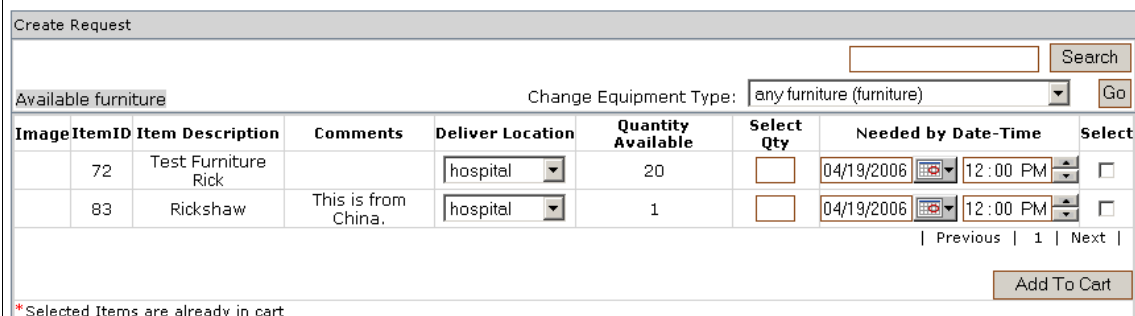


Figure 8 shows a web form titled "Create Request" displaying a table of available furniture items. The table has columns for Image, ItemID, Item Description, Comments, Deliver Location, Quantity Available, Select Qty, Needed by Date-Time, and Select. Two items are listed: "Test Furniture Rick" (ItemID 72, Quantity Available 20) and "Rickshaw" (ItemID 83, Quantity Available 1). Both items have a "hospital" delivery location and a "Needed by Date-Time" of "04/19/2006 12:00 PM". A "Search" button is at the top right, and a "Go" button is next to the "Change Equipment Type" dropdown. A "Previous" and "Next" button are at the bottom right. A "Add To Cart" button is at the bottom right. A note at the bottom left states: "*Selected Items are already in cart".

Image	ItemID	Item Description	Comments	Deliver Location	Quantity Available	Select Qty	Needed by Date-Time	Select
	72	Test Furniture Rick		hospital	20	<input type="text"/>	04/19/2006 12:00 PM	<input type="checkbox"/>
	83	Rickshaw	This is from China.	hospital	1	<input type="text"/>	04/19/2006 12:00 PM	<input type="checkbox"/>

Figure 8

The difference from this screen and the BOX type screen is the Quantity Available appears here in place of the Estimated Time of Use column.

The other difference is that you can take an image (jpeg, gif, etc.) file can be attached to a Furniture type item. This is done by the Server user.

Enter the select quantity (request quantity) for one of the Furniture items and **Click** the **Add to Cart** button. You will receive the following screen: **Figure 9**

Cart View

Continue

Image	ItemID	Item Description	Request Qty	Deliver Location	Needed By Date-Time	Estimated Return Date-Time	Remove
	86	Waste management records	1	hospital	04/19/2006 12:00 PM	04/19/2006 12:00 PM	<input type="checkbox"/>
	83	Rickshaw	1	hospital	04/19/2006 12:00 PM		<input type="checkbox"/>

Order Comments

Clear Cart Update Cart

Submit Request

Figure 9

You can now either *Continue* on, *Clear items* from this request, or *Submit* the request. Let's continue to see what the Request screen for Equipment looks like.

Select the **Continue** button.

Back at a familiar screen below: **Figure 10**

Create Request

Search

Select Equipment Type: Go

Figure 10

Select Equipment for an **Equipment Type** and **Click** the **Go** button.

See the following screen: **Figure 11**

Create Request

Search

Available equipment

Change Equipment Type: Go

Image	ItemID	Item Description	Comments	Deliver Location	Needed by Date-Time	Estimated Return Date-Time	Patient ID	Patient Last Name	Procedure Code	Available	Select
	32	aaah7yh76		hospital	04/19/2006 12:00 PM	04/19/2006 12:00 PM				NO	<input type="checkbox"/>
<input checked="" type="checkbox"/>	45	Patch2601		hospital	04/19/2006 12:00 PM	04/19/2006 12:00 PM				Yes	<input type="checkbox"/>
	68	RickTest		hospital	04/19/2006 12:00 PM	04/19/2006 12:00 PM				Yes	<input type="checkbox"/>
	74	TEST EQUIP RICK		hospital	04/19/2006 12:00 PM	04/19/2006 12:00 PM				Yes	<input type="checkbox"/>
	75	TEST EQUIP RICK NEW		hospital	04/19/2006 12:00 PM	04/19/2006 12:00 PM				Yes	<input type="checkbox"/>
	84	Light	No real comment necessary.	hospital	04/19/2006 12:00 PM	04/19/2006 12:00 PM				Yes	<input type="checkbox"/>

Previous | 1 | Next

Add To Cart

* Selected Items are already in cart



Figure 11

With this equipment, the major difference is that the user can enter Patient ID, Patient Last Name or Procedure codes as well as ordering the equipment.

After entering this information and selecting the item for delivery by **Checking** the **Select** check box on the respective items, **Click** the **Add to Cart** button.

Now you should see the following screen: **Figure 12**

Cart View Continue

Image	ItemID	Item Description	Request Qty	Deliver Location	Needed By Date-Time	Estimated Return Date-Time	Remove
	86	Waste management records	1	hospital	04/19/2006 12:00 PM	04/19/2006 12:00 PM	<input type="checkbox"/>
	45	Patch2601	1	hospital	04/19/2006 12:00 PM	04/19/2006 12:00 PM	<input type="checkbox"/>
	83	Rickshaw	1	hospital	04/19/2006 12:00 PM		<input type="checkbox"/>

Order Comments:


Clear Cart Update Cart

Submit Request

Figure 12

If you are finished with the cart **Click** on the **Submit Request** button which will display the following screen: **Figure 13**

Request 1035 has been placed successfully - 4/19/2006 5:35:29 PM

Image	ItemID	Item Description	Selected Qty	Estimated Return Date-Time	Deliver Location	Needed By Date-Time
	86	Waste management records	1	04/19/2006 12:00:00 PM	hospital	04/19/2006 12:00:00 PM
	45	Patch2601	1	04/19/2006 12:00:00 PM	hospital	04/19/2006 12:00:00 PM
	83	Rickshaw	1		hospital	04/19/2006 12:00:00 PM

Order Comments:

Figure 13

The screen should now show that the items have been requested and also the date and time they have been requested, along with the Request number. The Request number is located in the upper left portion of the screen: **Figure 13**

Let's look at the **Request Status** option from the menu.

Request Status

Request status will show you your historical requested information: **Figure 14**

Welcome **SUSAN BRANSON**

Request History

*Select Status

Select Status ▾

*From Date

02/02/2005

⌂

*To Date

02/12/2005

⌂

Go

Figure 14

Selecting the drop down window you can highlight your requests based on statuses of *ALL, Open, Delivered, and Canceled*: **Figure 15**

Request History

*Select Status

Select Status ▾

All
Open
Delivered
Cancelled

*From Date

02/02/2005

⌂

*To Date

02/12/2005

⌂

Go

Figure 15

After you select a highlighted status you will get the following screen: **Figure 16**

Request History

*Select Status

All ▾

*From Date

02/02/2005

⌂

*To Date

02/12/2005

⌂

Go

*Select Request

Select Request Id ▾

Show Details

Figure 16

Now you are prompted for another selection, **Select Request**. Using the drop down window it will show you all Request Numbers that are in a Status of ALL (since this was the status that we selected: **Figure 17**

Request History

*Select Status: All

*From Date: 02/02/2005 *To Date: 02/12/2005 Go

*Select Request: Select Request Id Show Details

Select Request Id

- 1002
- 1003
- 1005
- 1013

Figure 17

There are 4 different requests for this user. Highlight one and **Click** the **Show Details** button. You will receive the following screen: **Figure 18**

Request History

*Select Status: All

*From Date: 04/09/2006 *To Date: 04/19/2006 Go

*Select Request: 1035 Show Details

Request Number : 1035 Request Date : 4/19/2006 5:35:00 PM

Order Comments:

Image	Item Id	Item Description	Request Qty	Deliver Location	Status	Change Return Date	Remove
	86	Waste management records	1	hospital	OPEN		<input type="checkbox"/>
	45	Patch2601	1	hospital	OPEN		<input type="checkbox"/>
	83	Rickshaw	1	hospital	OPEN		<input type="checkbox"/>

* Mandatory

Update Items

Figure 18

On this screen you can see the Request Number, Request Date, Item information, and the status of the item requested.

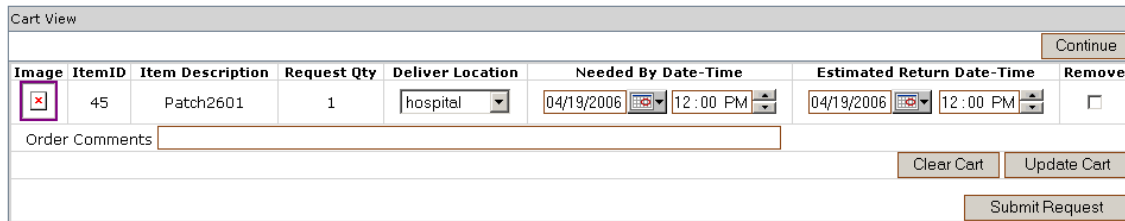
The screen shows that all items on this request are still **OPEN**. This is the last point where you can cancel an item to be delivered. Simply **Check** the **Remove** box next to the item you wish to cancel and **Click** the **Update Items** button.

During the search you just performed you could have selected only OPEN items, ONLY Canceled Items, or ONLY Delivered items. This would have provided less data. You can narrow the data search further by utilizing the From and To date fields.

View Cart

This is used if you have created a request but have not submitted it yet. Perhaps you are in the middle of placing a request and have to leave suddenly. You want to view what you have on the cart, and finish requesting items.

By using this option you will receive the following screen: **Figure 19**



The screenshot shows a web interface titled "Cart View". At the top right is a "Continue" button. Below it is a table with the following columns: Image, ItemID, Item Description, Request Qty, Deliver Location, Needed By Date-Time, Estimated Return Date-Time, and Remove. The first row contains: a small image icon with a red 'x', ItemID 45, Item Description Patch2601, Request Qty 1, Deliver Location hospital (dropdown), Needed By Date-Time 04/19/2006 12:00 PM (calendar/time picker), Estimated Return Date-Time 04/19/2006 12:00 PM (calendar/time picker), and a Remove checkbox. Below the table is an "Order Comments" text area. At the bottom right are three buttons: "Clear Cart", "Update Cart", and "Submit Request".

Image	ItemID	Item Description	Request Qty	Deliver Location	Needed By Date-Time	Estimated Return Date-Time	Remove
	45	Patch2601	1	hospital	04/19/2006 12:00 PM	04/19/2006 12:00 PM	<input type="checkbox"/>

Order Comments

Clear Cart Update Cart Submit Request

Figure 19

Now you can *continue ordering*, *clear the cart* or *submit* the request.