

# **@Par Server User Guide**

## **@TrackIT**

### **@Par Version 2.6.3**

**This documentation is intended for use by  
Functional Managers and Server users**

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**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 Shots to update to current release level.

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## **Introduction to @TrackIT**

**AtPar, Inc.** has developed the latest product, **@TrackIT**, to “track” Furniture, Equipment, and Box/Document items. These items are generally not Stock Items but need to be maintained and have an audit trail.

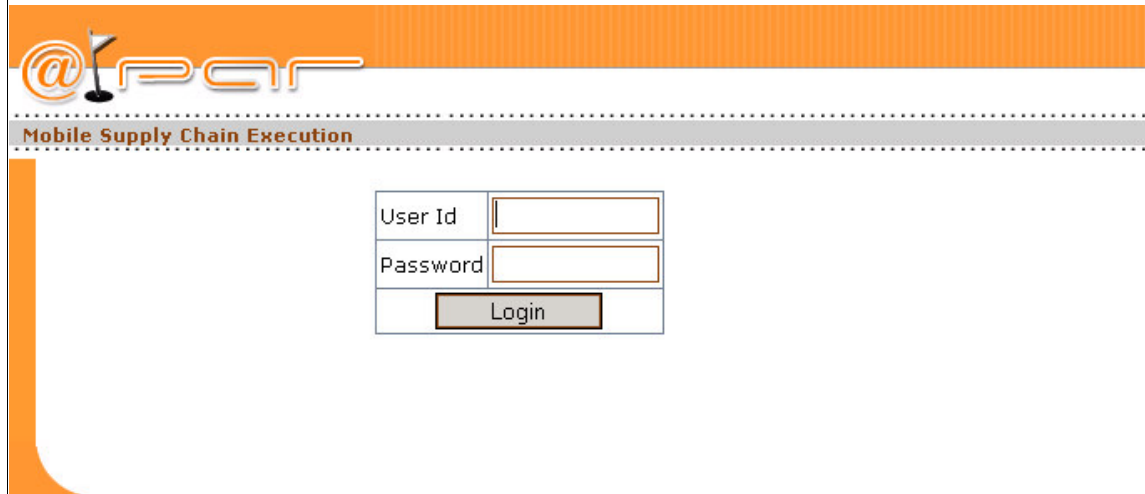
**@TrackIT** allows *Requestors* the ability to “order” an item from the Warehouse and have it delivered to their department. **@TrackIT** will “track” the item from the Warehouse, to the Department, return to the Warehouse, and return to the location. The *Requestor* role is covered in the **@Par Server Requestor Guide – @TrackIT**.


The **MAJOR** difference from **@TrackIT** to the 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.

This document will cover all Server User functions of **@TrackIT**.

## **Logging in to the @Par Server**

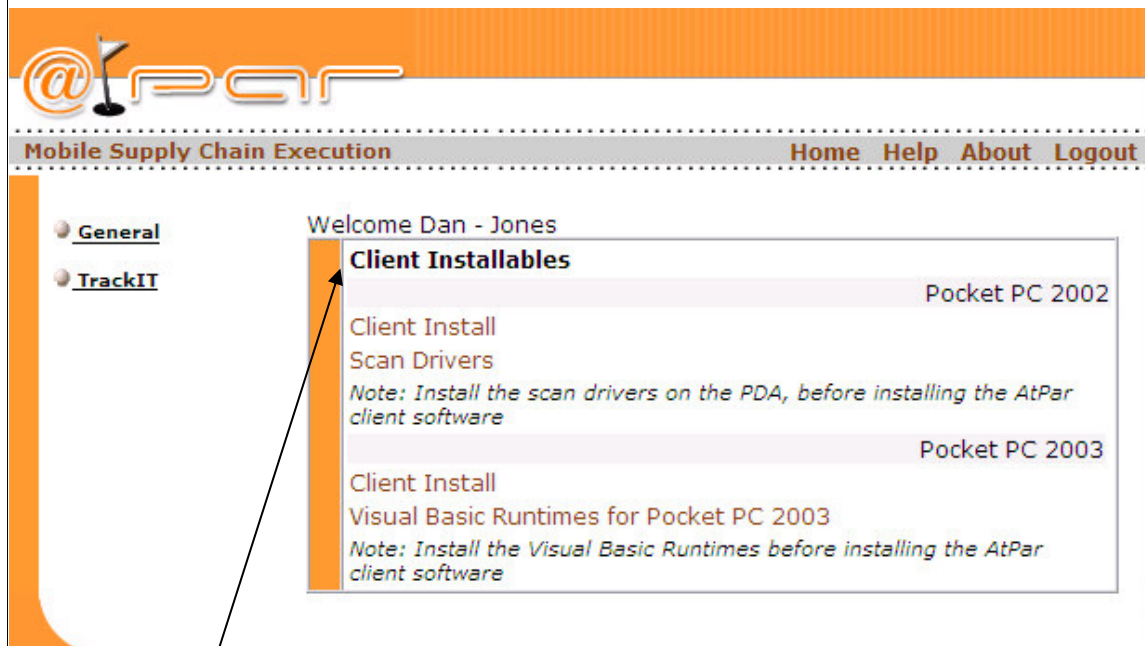
When you connect to the @Par Server, the first screen that appears is the **Login** screen: **Figure 1**



	
Mobile Supply Chain Execution	
User Id	<input type="text"/>
Password	<input type="password"/>
<input type="button" value="Login"/>	

**Figure 1**

You must have a Server Userid and Password to login. After you login you will see the following screen: **Figure 2**



**Figure 2**

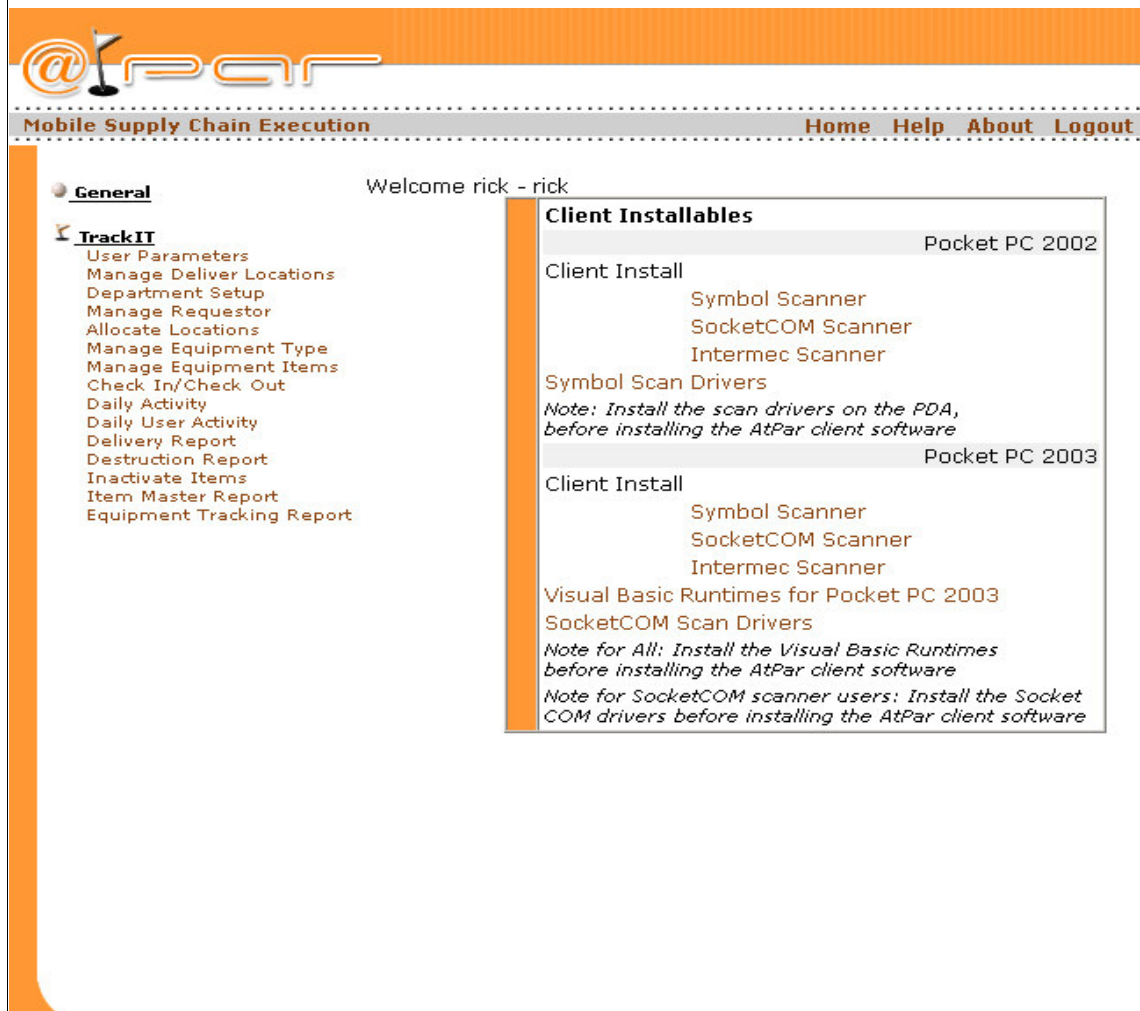
The installable Client components will be covered in the hand held documentation. This is where the client downloads the files onto the hand held so they can access @Par.

### **General**

The **General** functions used by any server user, including the @Par Administrator.

- My Profile
  - Used to modify the server UserID information
  - **Admin UserID may not be changed or edited**
- Change Password
  - Used to change Administrator / Function Manager / Supervisor password as needed
- Error Reports
  - Covered in detail in the @Par Server Users Guide

This manual will look at the @TrackIT menu option. Selecting @TrackIT from **Figure 2** will give you the following screen: **Figure 3**



**Figure 3**

We will begin with the **User Parameters** menu option.

## User Parameters

This section allows you to set up parameters that are specific to that client user: **Figure 4**

**Click** on **User Parameters** to set up parameters for the individual user. This is the first step in setting up a user for the @TrackIt application. After the initial setup, or when making any changes or modifications, you must **Click** the **Submit** button to save.

User Parameters		
User Id	gary gary (GARY) ▼	Go
Parameter	Value	Description
Default Date Range	5	[Default Date Range for Search on the handheld]
Default barcode printer		[Name of the Printer to print barcodes on, Printer names are available in ControlPanel->Printers and Faxes]
Signature Confirmation	<input checked="" type="checkbox"/>	[Checking this will force the user to take the signature confirmation from the delivered to individual]
Pick Confirmation	<input checked="" type="checkbox"/>	[Checking this will force the user to confirm the items pickup]
Pick Required	<input checked="" type="checkbox"/>	[Checking this will allow the user to check the availability of an item before it is picked up]
Upload deliver event information to server	<input type="checkbox"/>	[Checking this will upload the deliver event information to server when network connection is available as soon as it is delivered]
Upload load event information to server	<input type="checkbox"/>	[Checking this will upload the load event information to server when network connection is available as soon as it is loaded]
Upload picked event information to server	<input checked="" type="checkbox"/>	[Checking this will upload the pick event information to server when network connection is available as soon as it is picked]
Upload Return event information to server	<input type="checkbox"/>	[Checking this will upload the Return event information to server when network connection is available as soon as it is returned]
Upload Take event information to server	<input checked="" type="checkbox"/>	[Checking this will upload the Take event information to server when network connection is available as soon as it is taken]
Upload unload event information to server	<input type="checkbox"/>	[Checking this will upload the unload event information to server when network connection is available as soon as it is unloaded]
Show Sign Screen	<input checked="" type="checkbox"/>	[Checking this will allow the user to see the Sign Screen On the PDA]
Super User	<input type="checkbox"/>	[Allows user to view, modify, upload, delete other users data on handheld]
Submit		

**Figure 4**

**Default Date Range** - Default date range in number of days that the hand held will search for when doing a lookup. Today is the first day, and it will search *back* the number of days specified.

**Default bar code printer** – Name of the printer to print bar codes.

**Allow print delivery receipts** – This allows the user delivering items to print a receipt for the recipient.



**Signature Confirmation** – If you click on this option it will force the user to sign for the confirmation.

**Pick Confirmation** – Checking this option will force the user to confirm the item pickup.

**Upload Deliver Event Information to server** – Checking this option will upload the deliver event information to the **@Par Server**.

**Upload Load Event Information to server** – Checking this option will upload the load event information to the **@Par Server**.

**Upload Picked Event Information to server** – Checking this option will upload the pick event information to the **@Par Server**.

**Upload Return Event Information to server** – Checking this option will upload the return event information to the **@Par Server**.

**Upload Take Event Information to server** – Checking this option will upload the take event information to the **@Par Server**.

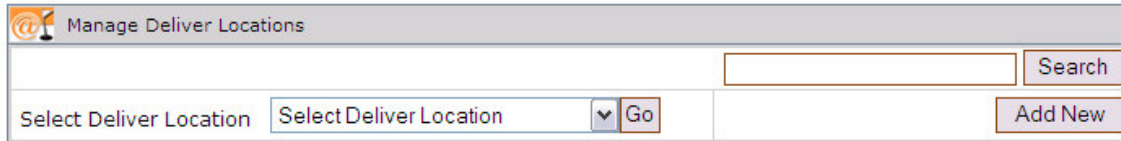
**Upload Unload Event Information to server** – Checking this option will upload the unload event information to the **@Par Server**.

**Show Sign Screen** – Checking this option will allow the user to see the Sign Screen on the hand held.

**Super User** – Checking this option allows user to view, modify, upload, and delete other user information on hand held device.

## **Manage Deliver Locations**

Manage Locations allows you to manage (add, delete, modify) the **deliver to** locations that hand held client users deliver the goods. This is the first step in setting up your @TrackIT system. **Click** on this menu option to display the following screen: **Figure 5**



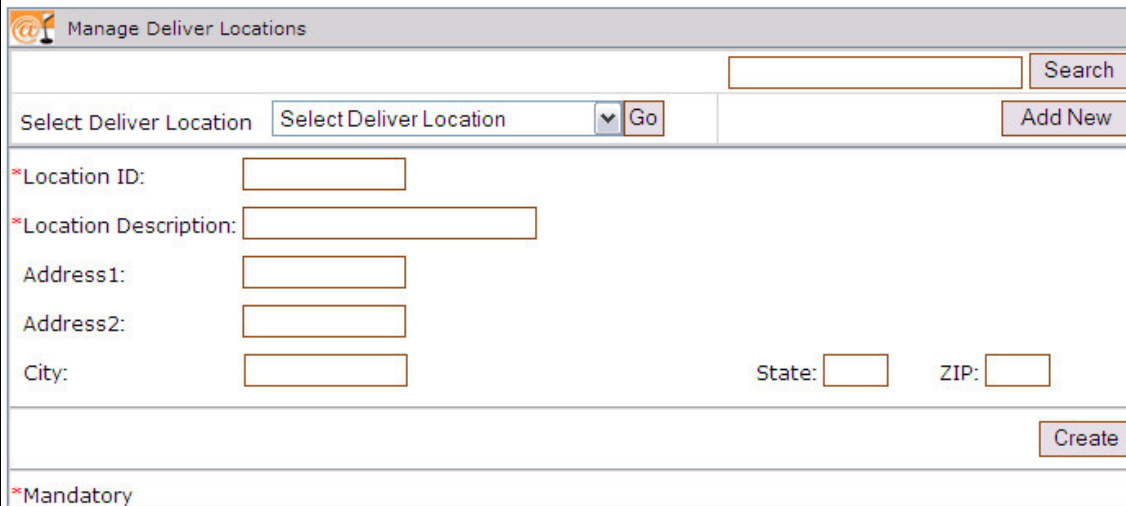
The screenshot shows a web interface titled "Manage Deliver Locations". It features a search bar with a "Search" button, a dropdown menu labeled "Select Deliver Location" with a "Go" button, and an "Add New" button.

**Figure 5**

**Select Deliver Location** – Used to highlight and select an existing location to delete or update.

**Go** – After you select a Location, click on this button to Go to or find the location.

**Add New** – Click on this button to add a new location in @TrackIT: **Figure 6**



The screenshot shows the "Manage Deliver Locations" screen with the "Add New" button highlighted. Below the search bar, there is a form with the following fields: "Location ID:" (mandatory), "Location Description:" (mandatory), "Address1:", "Address2:", "City:", "State:", and "ZIP:". A "Create" button is at the bottom right. A legend at the bottom left indicates that fields marked with an asterisk (\*) are mandatory.

**Figure 6**

**Search** – Enter all or part of the Location Description to find all applicable locations.

**Location ID** – 10 Character, Alphanumeric field.

**Location Description** – Free form text field used to enter a complete description of the Location ID.

**Address1** – Physical address for this location.

**Address2** – Secondary address for this location.

**City** – Location City.

**State** – Location State.

**Zip** – Location Zip Code.

**Create** – Click on the create button when you are ready to save this location's information.

To edit or delete a location, go into the **Manage Locations** option.

Select the location in the drop down box and **Click** the **Go** button. You will get the next screen: **Figure 7**

Manage Deliver Locations

Search

Select Deliver Location: Any Office 1(Office 1) Go Add New

Location ID: Office 1

\*Location Description: Any Office 1

Address1: Building A

Address2:

City: State: ZIP:

Delete Location Update

\*Mandatory

**Figure 7**

Notice there are now two new buttons which appear; **Delete Location** and **Update**.

**Delete Location** – This button is used to delete a location.

**Update** – Click on this button after you have edited the location and want to save the change or changes.

## **Department Setup**

The next step in the @TrackIT set up, is to create your internal departments. This will allow you to limit the items a *requestor* may order, eliminating critical information being disseminated to the wrong person.

**Click** the **Department Setup** option from the menu: **Figure 8**

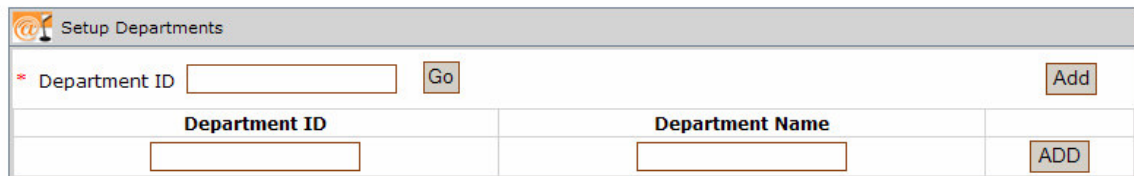


Setup Departments

\* Department ID  Go Add

**Figure 8**

To add a new department **Click Add** to display: **Figure 9**



Setup Departments

\* Department ID  Go Add

Department ID	Department Name	
<input type="text"/>	<input type="text"/>	<span>ADD</span>

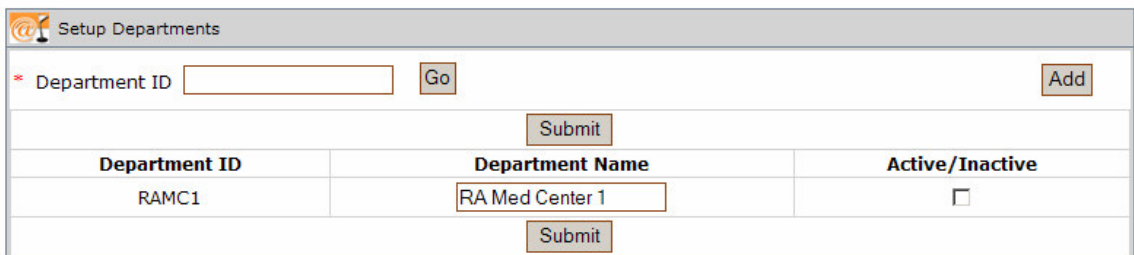
**Figure 9**

**Department ID** – Enter up to 5 characters for your internal department id number.

**Department Name** – Enter a detailed departmental name or description.

**ADD** – Click Add to add the new department.

To edit a department type in the Department Id and **Click Go** to display: **Figure 10**



Setup Departments

\* Department ID  Go Add

Submit

Department ID	Department Name	Active/Inactive
RAMC1	<input type="text" value="RA Med Center 1"/>	<input type="checkbox"/>

Submit

**Figure 10**

**Active/Inactive** – Placing a check in this box will make a department Inactive. If the check box is grayed out, it is indicating that a requestor is assigned to that department, and in order to inactivate the department, the requestor must be unassigned.

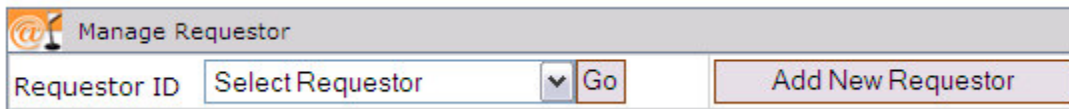
**Submit** – Once you edit the Description, **Click Submit** to save.

## **Manage Requestor**

The next step is the **Manage Requestor** option. *Requestor* information is further defined in detail in the **@Par Requestor User Guide – @TrackIT** document.

The Server User can *add* and *modify* users with the ability to request items for delivery.

**Click** on this option and the following screen will display: **Figure 11**



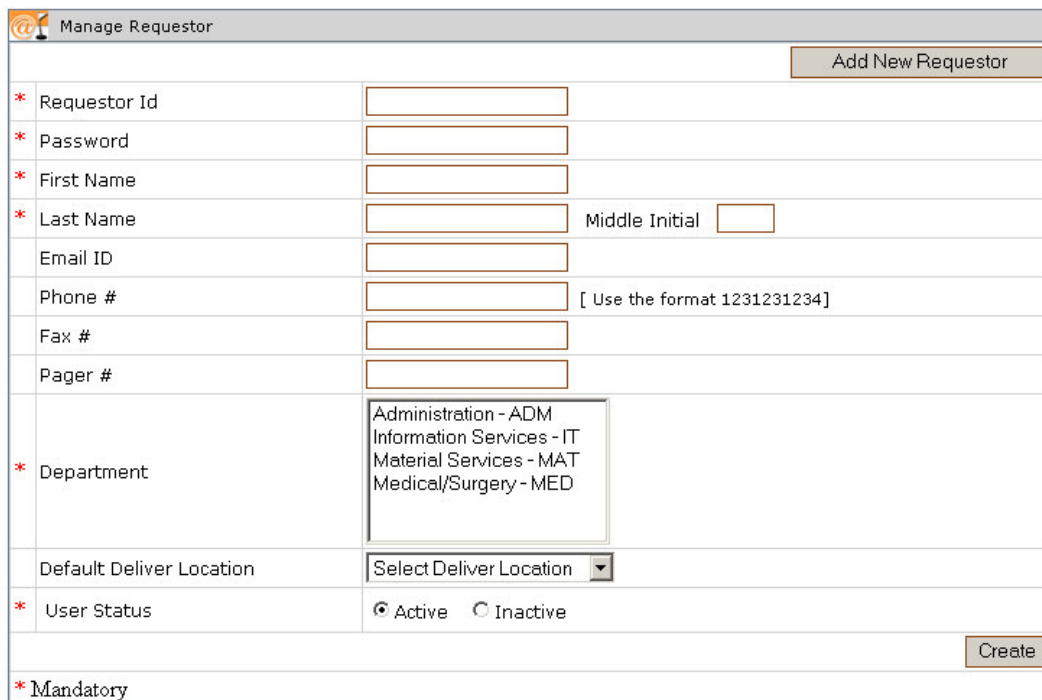
The screenshot shows the top portion of a web application window titled "Manage Requestor". It features a search bar with the text "Requestor ID" followed by a dropdown menu currently displaying "Select Requestor". To the right of the dropdown is a "Go" button. Further to the right is a larger button labeled "Add New Requestor".

**Figure 11**

**Requestor ID** – Drop Down window to select an existing *Requestor*.

**Go** – After selecting a *Requestor*, click this button to find or go to that *Requestor*.

**Add New Requestor** – Click on this button to add a new *Requestor*. See: **Figure 12**



The screenshot shows the main form area of the "Manage Requestor" page. It contains several input fields for user information: "Requestor Id", "Password", "First Name", "Last Name", "Email ID", "Phone #", "Fax #", and "Pager #". The "Last Name" field is followed by a "Middle Initial" field. A "Department" dropdown menu is open, showing a list of options: "Administration - ADM", "Information Services - IT", "Material Services - MAT", and "Medical/Surgery - MED". Below the department field is a "Default Deliver Location" dropdown menu with "Select Deliver Location" as the current selection. At the bottom of the form are "User Status" radio buttons for "Active" (selected) and "Inactive", and a "Create" button. A note at the bottom left states "\* Mandatory".

**Figure 12**

**Note:** All fields with a red asterisk are mandatory fields and must be entered.

**Requestor ID** – Unique ID field. User enters the Requestor ID in this alphanumeric field.

**Password** – Alphanumeric field to enter the *Requestor's* password.

**First Name** – Alpha field used to enter *Requestor's* first name.

**Last Name** – Alpha field used to enter *Requestor's* last name.

**Middle Initial** - Alpha field used to enter *Requestor's* middle initial.

**Email ID** – Text field used to enter *Requestor's* email address.

**Phone #** - Numeric field used to enter *Requestor's* phone number. Dashes, Spaces, and parentheses not required.

**Fax #** - Numeric field used to enter *Requestor's* fax number. Dashes, Spaces, and parentheses not required.

**Pager #** - Numeric field used to enter *Requestor's* pager number. Dashes, Spaces, and parentheses not required.

**Department** – *Requestor's* department ID. Data should populate based on Department Setup. To select multiple departments, highlight and CLICK with mouse.

**Default Deliver Location** – Default ***deliver to*** location of the *Requestor*.

**User Status** – Active or Inactive. Because of historical data and reporting, @TrackIT doesn't delete a user, simply make a user Inactive if they leave your organization.

Once *Requestors* have been added they can be modified by the Server User by select the *Manage Requestor* option.

When this is done, you will see the next screen: **Figure 13**

Manage Requestor		
		<input type="button" value="Add New Requestor"/>
* Requestor Id	admin user (admin)	
* Password	<input type="text"/>	
* First Name	<input type="text" value="admin"/>	
* Last Name	<input type="text" value="user"/>	Middle Initial <input type="text"/>
Email ID	<input type="text"/>	
Phone #	<input type="text"/>	
Fax #	<input type="text"/>	
Pager #	<input type="text"/>	
* Department	<div>Administration - ADM Facilities - FAC Internal Medicine - MED Receiving - REC</div>	
Default Deliver Location	<input type="text" value="Any Hospital (Hospital)"/>	
* User Status	<input checked="" type="radio"/> Active <input type="radio"/> Inactive	
		<input type="button" value="Update Requestor"/>
* Mandatory		

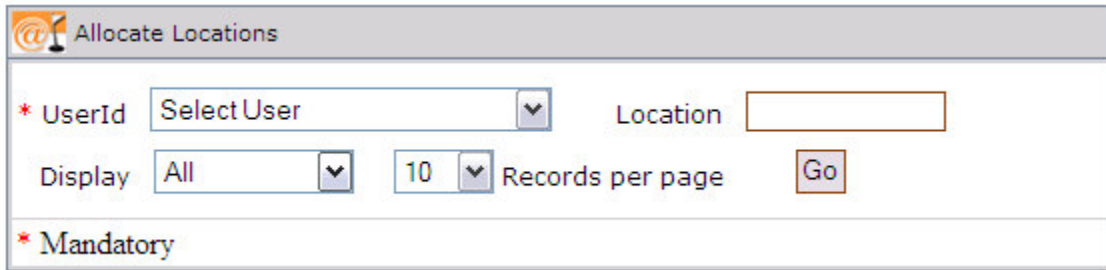
**Figure 13**

Notice the only change to this screen is the **Update Requestor** button. Type in a change or changes, and when finished, click the Update Requestor button. This will save the changes made.



## **Allocate Locations**

Allocate Locations is recommended and allows you to define the deliver to/ship to locations where this user will be delivering the goods: **Figure 14**

The screenshot shows a web form titled "Allocate Locations" with a logo on the left. The form contains several input fields: a required field for "UserId" with a dropdown menu currently showing "Select User", an optional "Location" text field, a "Display" dropdown menu set to "All", a "Records per page" dropdown menu set to "10", and a "Go" button. At the bottom, there is a note marked with a red asterisk: "\* Mandatory".

**Figure 14**

**Select a UserID** from the drop down box.

**Location** – This is an optional search field. This field is used if you want to find one or more location beginning with the same sequence of characters.

**\*\*NOTE: If your organization has a multitude of locations, you might choose to allocate using fewer locations at a time instead of all.**

**Display Option** - Allows you to choose to view allocated or unallocated locations for THIS user.

**Records per page** - This determines how many records or lines will appear in the detail section of the hand held.

When you are ready, **Click Go**.

The following screen will be displayed: **Figure 15**

**\* UserId** Gary Brown (GARYB) **Location**

**Display** All **Records per page** 10 **Go**

**\* Mandatory**

**0 out of 2 allocated Locations for user GARYB**

Select	Location	Description	User	Sort Order
<input type="checkbox"/>	Mem01	Memorial Hospital		<input type="text"/>
<input type="checkbox"/>	WHSE1	14th St Warehouse		<input type="text"/>

Previous | 1 | Next

**Submit**

**Figure 15**

You may now allocate a location or locations for this UserId by selecting the check box. Also, you will want to add a sort order if you choose more than one location.

The sort order field is used to set an ordering sequence for the locations on the hand held.

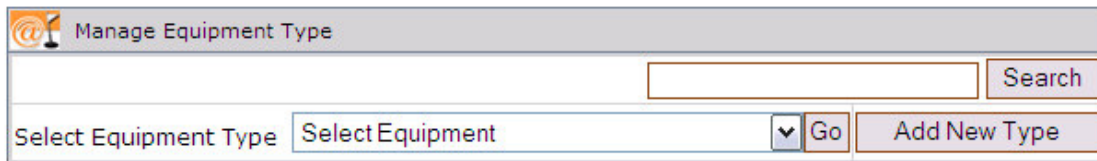
- In the example above, if you want the WHSE1 location to appear first on the hand held, type a 1 in the Sort Order
- If it doesn't matter how they appear on the hand held, type a 99 in all location Sort Order boxes

Once you have completed your selections and sort orders, **Click Submit** to save.

## **Manage Equipment Type**

This is the next step in setting up the system. The Server user will define the Upper/Parent/Generic level of Equipment. For example, Chair Mats. The Server user will set up an Equipment type of CHRMAT, for Chair Mats. All different sizes of chair mats will fall under this one particular type, and the different sizes will be assigned Item ID numbers in the **Manage Equipment Items** in the section discussed next.

By **clicking** on the **Manage Equipment Type**, you will see the next screen: **Figure 16**



**Figure 16**

**Select Equipment Type** – A drop down box for you to **Select** an existing **Equipment Type**. **Highlight** the Equipment type and **Click Go**.

**Search** – Used to find an existing Equipment type. Type in the Equipment type name/description or partial and click this button.

**Add New Type** – This button is used to add a new Equipment type.

To add an Equipment Item, **Click** the **Add New Type** button and you will get the next screen: **Figure 17**

The screenshot shows a web form titled "Create Equipment Type". At the top right is a "Search" button. Below it is a "Select Equipment Type" section with a dropdown menu currently showing "Select Equipment", a "Go" button, and an "Add New Type" button. The main form area contains three mandatory fields, each marked with a red asterisk: "\*Equipment Type:" with a text input, "\*Equipment Description:" with a text input, and "\*Equipment Indicator:" with a dropdown menu showing "Select Indicator". A "Create" button is located at the bottom right of the form. A legend at the bottom left states "\*Mandatory".

**Figure 17**

**Note:** All fields with a red asterisk are mandatory fields and must be entered.

**Equipment Type** – This is a unique Equipment Type, meaning that the data entered here can't be entered again.

**Equipment Description** – Enter the Equipment Type description information.

**Equipment Indicator – Drop down window.** Select from options:

- B (Box)
- E (Equipment)
- F (Furniture)

**Click Create** to save the information.

To modify an existing Equipment Type, select **Manage Equipment Type** from menu options.

Use the Equipment Type drop down window to select an existing Equipment type.

**Click the Go** button.

You will now have the next screen: **Figure 18**

Manage Equipment Type

Search

Select Equipment Type Furniture (Furniture) Go Add New Type

Equipment Type: Furniture

\*Equipment Description: Furniture

\*Equipment Indicator: F

Delete Update

\*Mandatory

**Figure 18**

**Equipment Type** – In the modify mode, this field cannot be edited.

**Equipment Description** – Enter the Equipment Type description information.

**Equipment Indicator** – B (Box), E (Equipment), F (Furniture).

There are two new buttons:

**Delete** – Click this button to delete this Equipment type.

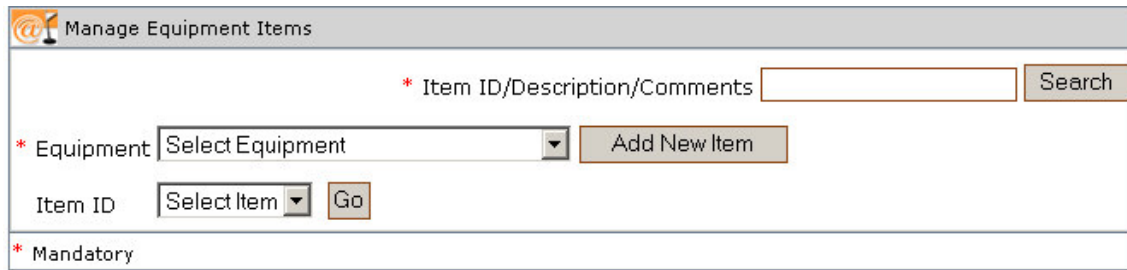
**Update** – Click this button to save any changed you make to this Equipment type.

## **Manage Equipment Items**

This is the next step to set up @TrackIT. This is where items are defined.

Select **Manage Equipment Items** from the menu options to receive the next screen:

**Figure 19**



The screenshot shows a web application window titled "Manage Equipment Items". It features a search bar at the top with a red asterisk and the text "\* Item ID/Description/Comments" followed by a text input field and a "Search" button. Below this is a section for equipment selection with a red asterisk and the text "\* Equipment". It includes a dropdown menu currently showing "Select Equipment" and an "Add New Item" button. At the bottom of this section, there is an "Item ID" label, another dropdown menu showing "Select Item", and a "Go" button. A red asterisk and the text "\* Mandatory" are located at the very bottom of the form area.

**Figure 19**

**Select Equipment Type** – A drop down box for you to select an existing Equipment Item. Highlight the Equipment Item and click the *Go* button.

**Search** – Used to find an existing Equipment Item. Type in the Equipment Item name/description or partial and click this button.

**Add New Item** – This button is used to add a new Item.

### ADD NEW ITEM, FURNITURE TYPE :

Select a Furniture Equipment type from the drop down window, then **Click the Add New Item** button and you will see the next screen: **Figure 20**

Create Equipment Items

\* Item ID/Description/Comments  Search

\* Equipment any furniture(furniture) Add New Item

Item ID Select Item Go

\* Mandatory

Item ID	83
* Item Description	<input type="text"/>
* Storage Location	<input type="text"/>
Inactivate Item	<input type="checkbox"/>
* Destruction / Max Storage Date	04/19/2007 <input type="button" value="Calendar"/>
* Quantity	<input type="text"/>
Comments	<input type="text"/>
Manufacturer	<input type="text"/>
Vendor	<input type="text"/>
Image	<input type="text"/> Browse...

Create and PrintLabel Create

**Figure 20**

**Note:** All fields with a red asterisk are mandatory fields and must be entered.

**Item ID** – System automatically assigns a unique number.

**Item Description** – Enter a detailed item description.

**Storage Location** – Enter the location where the item is stored.

**Inactivate Item** – Check to inactivate item, Uncheck to Activate item.

**Destruction /Max Storage Date** – Date item is either destroyed or stored.

**Quantity** – Enter the item quantity.

**Comments** – Enter any comments in this free form field.

**Manufacturer** – Enter the name of the item manufacturer.

**Vendor** – Enter the Vendor name that you purchase the item from.

**Image** – Click the Browse button to select an image of the item.

**IMPORTANT NOTE:** The image must be scanned first before you will be able to select the picture. You also have a 200kb limit on an image.

To save, **Click** either the **Create and Print Label** button or the **Create** button. The **Create and Print Label** button allows you to print a bar code label to attach to the item.



### ADD NEW ITEM, BOX TYPE:

Select a Box type from the drop down window, then **Click** the **Add New Item** button and you will see the next screen: **Figure 21**

The screenshot shows a web application titled "Create Equipment Items". At the top right, there is a search bar labeled "\* Item ID/Description" with a "Search" button. Below this, the form is divided into several sections. The first section has a dropdown menu for "Equipment" with "any box(box)" selected, and an "Add New Item" button. Below that is an "ItemId" section with a "Select Item" dropdown and a "Go" button. The next section is labeled "\* Mandatory" and contains several fields: "Item Id" with the value "25", "Item Description", "Storage Location", "Inactivate Item" with an unchecked checkbox, and "Destruction / Max Storage Date" with the value "01/15/2006" and a calendar icon. Below these is a "Comments" text area. The "Departments" section shows a list of departments: "ADM - Administration", "IT - Information Services", "MAT - Material Services", and "MED - Medical/Surgery". A note below the list says "(Multiple selection can be done)". At the bottom right, there are two buttons: "Create and PrintLabel" and "Create".

**Figure 21**

**Note:** All fields with a red asterisk are mandatory fields and must be entered.

**Item ID** – System automatically assigns a unique number.

**Item Description** – Enter a detailed item description.

**Storage Location** – Enter the location where the item is stored.

**Inactivate Item** – Check to inactivate item, Uncheck to Activate item.

**Destruction /Max Storage Date** – Date item is either destroyed or stored.

**Comments** – Enter comments in text format here.

**Departments** – Highlight the department id. To select multiple Departments, hold the CTRL button while clicking on items with mouse.

To save, **Click** either the **Create and Print Label** or the **Create** button. The **Create and Print Label** button allows you to print a bar code label to attach to the item.

**ADD NEW ITEM, EQUIPMENT TYPE :**

Select an Equipment type from the drop down window, then **Click** the **Add New Item** button and you will see the next screen: **Figure 22**

Create Equipment Items

\* Item ID/Description/Comments  Search

\* Equipment  Add New Item

Item ID  Go

\* Mandatory

Item ID

\* Item Description

\* Storage Location

Inactivate Item ☐

Quantity

Comments

Manufacturer

Vendor

Image  Browse...

Departments   
 1 - Orthopedics  
 10 - Orthopedics  
 11 - Orthopedics  
 12 - Orthopedics  
 13 - Orthopedics  
 (Multiple selection can be done)

Serial #	Lot #	User Field	Next Service Date-Time(HH:MM)	Action
* <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="12:00 PM"/>	Add
* <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="12:00 PM"/>	Add
* <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="12:00 PM"/>	Add
* <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="12:00 PM"/>	Add
* <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="12:00 PM"/>	Add
* <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="12:00 PM"/>	Add

Create and PrintLabel Create

**Figure 22**

**Note:** All fields with a red asterisk are mandatory fields and must be entered.

**Item ID** – System automatically assigns a unique number.

**Item Description** – Enter a detailed item description.

**Storage Location** – Enter the location where the item is stored.

**Inactivate Item** – Check to inactivate item, Uncheck to Activate item.

**Quantity** – With Equipment, the quantity is automatically calculated based on item serial number entry.

**Comments** – Free form field to enter comments.

**Manufacturer** – Enter the name of the item manufacturer.

**Vendor** – Enter the Vendor name that you purchase the item from.

**Image** – Click the Browse button to select an image of the item.

**Departments** – Highlight the department id. To Select multiple Departments simply hold the CTRL button while clicking on items with mouse.

**Serial #** - Serial number of the Equipment item.

**Lot #** - Internal to organization, the Lot# of the Equipment item.

**Next Service Date** – Date and time of next service for this item if applicable.

**Add** – Adds the Serial number, Lot number, and Next Service date and time to this item. Notice after adding this information for an item, the *Add* button changes to *Inactivate*. To delete or inactivate this information from the item simply click on the *Inactivate* button.

To save, **Click** either the **Create and Print Label** button or the **Create** button. The **Create and Print Label** button allows you to print a bar code label to attach to the item.

## **Check In/Check Out**

This function provides Ad hoc capability to check an item in or out. If a warehouse has individuals stopping by and wish to check out an item or check in an item, they may do so using this option: **Figure 23**

### **Check IN**

**Figure 23**

**Note:** The number of lines displayed can be modified, based on Product parameter settings by the @Par Administrator. (No. of records per page option).

The “Please select an action” field defaults to CheckIn. If you need to check an item out, click on the drop down box and select CheckOut.

**Item ID** – Either enter the item id number or scan\* the bar code label of the item.

- **\*PC must be equipped with scanner.**

To see the next screen, you either **Scan** the **item** or **Enter** the **item manually** and **Click** on the number associated with the item (i.e. >0, >1).

**Serial #** - Enter Item serial number if required, then click on number (i.e. >0) and the following information should automatically fill with defaults from Item Description and Serial Number entered..

**Item Description** – Automatically defaults from Item Description entered for this item id.

**Available QTY** - Automatically defaults from QTY entered for this item id.

**Check In Qty** – Enter the item quantity you are checking in.

**Storage Location** - Automatically defaults from Storage Location entered for this item id.

**Mfr** - Automatically defaults from Manufacturer entered for this item id.

**Vendor** - Automatically defaults from Vendor entered for this item id.

When you are ready to check the item in, ***Click*** on the **Check In** button.

## **Check OUT**

Select the Check In/Check Out menu option, and then select CheckOut from the “Please select an action” field.

You will receive the following screen: **Figure 24**

Item Id - Serial #	Item Description	Available Qty	Check Out Qty	Storage Location	Mfr/Vendor	Patient Id	Patient Last Name	Procedure Code	Deliver Location
<input type="text"/> >0	<input type="text"/> >1	<input type="text"/> >2	<input type="text"/> >3	<input type="text"/> >4					

**Figure 24**

**Item ID** – Either enter the item id number or scan\* the bar code label of the item.

- **\*PC must be equipped with scanner.**

To see the next screen, you either scan the item or enter the item manually and **Click** on the button associated with the item (ex. >0, >1).

**Serial #** - Either enter or scan the Item's serial number.

Now you will receive the following screen: **Figure 25**

Item Id - Serial #	Item Description	Available Qty	Check Out Qty	Storage Location	Mfr/Vendor	Patient Id	Patient Last Name	Procedure Code	Deliver Location
21 <input type="text"/> 12345 >0	IV Pump	1	1	Warehouse	Pumps R USMattel	<input type="text"/>	<input type="text"/>	<input type="text"/>	hospital
<input type="text"/> >1	<input type="text"/> >2	<input type="text"/> >3	<input type="text"/> >4						

**Figure 25**

**Item Description** – Automatically defaults from Item Description entered for this item id.

**Available QTY** - Automatically defaults from QTY entered for this item id.

**Check Out Qty** – Enter the item quantity you are checking out.

**Storage Location** - Automatically defaults from Storage Location entered for this item id.

**Mfr** - Automatically defaults from Manufacturer entered for this item id.

**Vendor** - Automatically defaults from Vendor entered for this item id.

**Patient ID** - Automatically defaults from Patient ID entered for this item id.

**Patient Last Name**- Automatically defaults from Patient Last Name entered for this item id.

**Procedure Code** - Automatically defaults from Procedure Code entered for this item id.

**Deliver Location** - Automatically defaults from Deliver to Location entered for this item id but can be edited.

When you are ready to check the item in, **Click** on the **Check Out** button.

## Daily Activity/Daily User Activity Reports

These reports will reflect Daily activity based on a date. Today's date will default automatically upon selecting this option. **Figure 26**

The screenshot shows the 'TrackIT Daily Activity' window. At the top, there are icons for download, print, and email. Below the title bar, there is a date selection field with a calendar icon and a 'Go' button. The date is set to 02/12/2005. Below this is a section labeled '\* Mandatory'. The main data is presented in a table with four columns: User, No of Locations Delivered to, No of Items delivered, and Avg. time taken for an item (secs). The table contains one row for user GARYB, showing 1 location, 1 item, and an average time of 660 seconds. A 'Details' button is located to the right of the table.

User	No of Locations Delivered to	No of Items delivered	Avg. time taken for an item (secs)
GARYB	1	1	660

**Figure 26**

If there is no activity for the day selected you can modify the date and change it to a particular date. If there is no activity for this date, you will get the next screen: **Figure 27**

The screenshot shows the 'TrackIT Daily Activity' window with the date set to 11/06/2004. Below the date field, there is a section labeled '\* Mandatory'. The main area of the window displays the text 'No data found'.

**Figure 27**

With all @Par reports, you have the ability to Email the report, Print the report, or Download the report into Excel. To perform any of these functions, simply **Click** the applicable icon in the upper right hand corner of the report.

Note that the “**Details**” button on the far right of the record is *Highlighted*: **Figure 26** **Click** on this for the detailed user report. See the next screen: **Figure 28**



TrackIT Daily User Activity

\* User ID: Fred Fred (FRED) \* Date: 01/05/2006 Go

\* Mandatory

(\*) If date time is same as selected date then only time is displayed.

Status	Request_Id	Line No	Item Id	Pick Time (HH:MI AM/PM)	Load Time (HH:MI AM/PM)	Unload Time (HH:MI AM/PM)	Deliver Time (HH:MI AM/PM)	Take Time (HH:MI AM/PM)	Return Time (HH:MI AM/PM)	Recipient	Attempt Date	Comments
Pick	1008	1	21	01/05 10:09 AM			01/05 10:09 AM			nurse		

Figure 28

You could also get to this report by selecting the **Daily User Activity** report option on the menu.

When accessing from the menu, you will see there is a new Status option which allows you to select items that are in Pickup, Load, Unload, Deliver, Take, and Return statuses: **Figure 29**

TrackIT Daily User Activity

\* User ID: Select User Status: ALL

\* Date: 04/19/2006 Go

\* Mandatory

ALL  
ALL  
PickUp  
Load  
Unload  
Deliver  
Take  
Return

Figure 29

This will give you a detailed report of the daily activity: **Figure 30**

TrackIT Daily User Activity

\* User ID: Fred Fred (FRED) \* Date: 01/05/2006 Go

\* Mandatory

(\*) If date time is same as selected date then only time is displayed.

Status	Request_Id	Line No	Item Id	Pick Time (HH:MI AM/PM)	Load Time (HH:MI AM/PM)	Unload Time (HH:MI AM/PM)	Deliver Time (HH:MI AM/PM)	Take Time (HH:MI AM/PM)	Return Time (HH:MI AM/PM)	Recipient	Attempt Date	Comments
Pick	1008	1	21	01/05 10:09 AM			01/05 10:09 AM			nurse		

Figure 30

**Status** – Color coded with the legend at the top of the report:

- PICKED – Blue
- LOADED – Yellow
- UNLOADED – Red
- DELIVERED – Green
- TAKE – Pink
- RETURN – Purple/Maroon

**Request\_Id** – Requestor's ID.

**Line No.** - Line number on the Order.

**Item ID** – Item number.

**Pick Time** – Time the driver/user Tapped the P button on the hand held.

**Load Time** – Time the driver/user Tapped the L button on the hand held.

**Unload Time** – Time the driver/user Tapped on the U button on the hand held.

**Deliver Time** – Time the driver/user Tapped on the D button on the hand held.

**Take Time** – Time the driver/user Tapped on the Take button on the hand held.

**Return Time** – Time the driver/user Tapped on the Return button on the hand held.

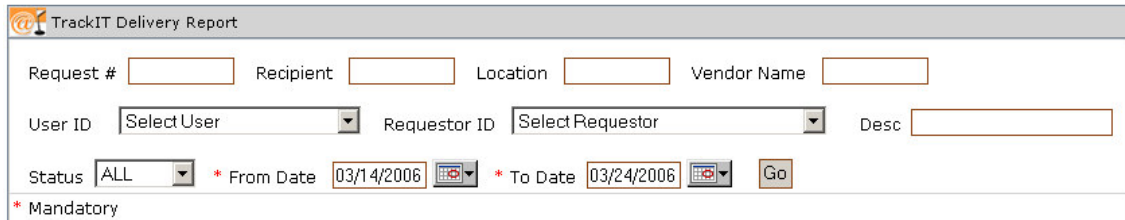
**Recipient** – Recipient's ID.

**Attempt Date** – Date and Time when the driver/user Tapped the Attempt button.

**Comments** – Comments entered on the Attempt screen.

## Delivery Report

This is a summary report of all deliveries for a specific date range. After selecting this option you will get the following screen: **Figure 31**



TrackIT Delivery Report

Request #  Recipient  Location  Vendor Name

User ID  Requestor ID  Desc

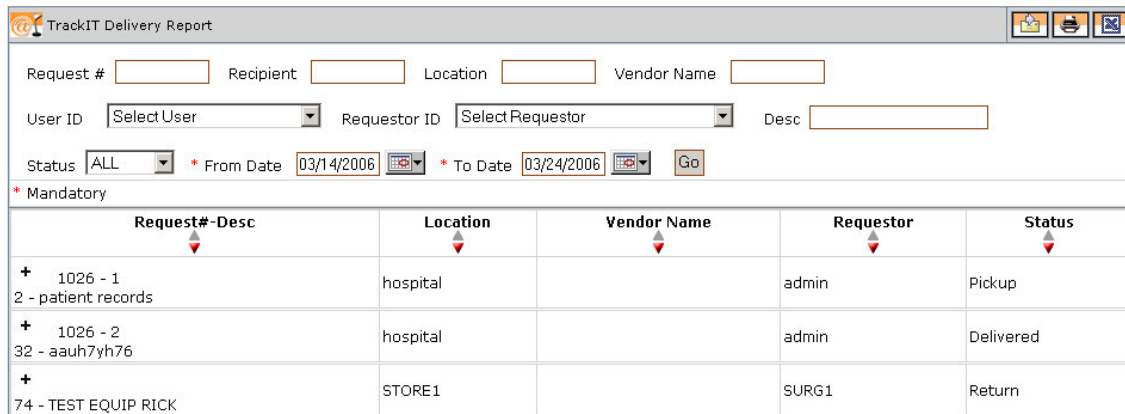
Status  \* From Date  \* To Date  Go

\* Mandatory

**Figure 31**

The fields in this section are your **Search** fields. You may run this report on Request #, Recipient, Location, Vendor name, User ID, Requestor ID, Status, Description and/or a Date Range.

Using just a date range you can see the report on the next screen: **Figure 32**



TrackIT Delivery Report

Request #  Recipient  Location  Vendor Name

User ID  Requestor ID  Desc

Status  \* From Date  \* To Date  Go

\* Mandatory

Request#-Desc	Location	Vendor Name	Requestor	Status
+ 1026 - 1 2 - patient records	hospital		admin	Pickup
+ 1026 - 2 32 - aauh7yh76	hospital		admin	Delivered
+ 74 - TEST EQUIP RICK	STORE1		SURG1	Return

**Figure 32**

**RequestNo- Desc** - Request # - Line # and Item number plus description display.

**Location** – Location of item.

**Vendor Name** – Vendor Name.

**Requestor** – Name of the person, who requested the item

**Status:** This is the **current** status of this item, location - Picked, Loaded, Uploaded, or Delivered.

To see complete information, **click** the plus sign (+).

After **clicking** the + on one of the requests, the following screen will appear: **Figure 33**

The screenshot shows the 'TrackIT Delivery Report' window. At the top, there are search filters: Request #, Recipient, Location, Vendor Name, User ID (Select User), Requestor ID (Select Requestor), Desc, Status (ALL), From Date (03/14/2006), To Date (03/24/2006), and a Go button. Below the filters is a table with columns: Request#-Desc, Location, Vendor Name, Requestor, and Status. The table contains two rows of data. The first row is expanded, showing event details: Pickup on 3/23/2006 2:05:00 PM by User GARY for Recipient admin, and Delivered on 3/24/2006 1:07:00 PM by User FRED for Recipient admin. A signature box is also present. The second row is not expanded.

Request#-Desc	Location	Vendor Name	Requestor	Status
+ 1026 - 1 2 - patient records	hospital		admin	Pickup
- 1026 - 2 32 - aauh7yh76	hospital		admin	Delivered
<b>Event Details</b>				
Event	Event Date(MM/DD/YYYY HH:MI:SS)	User	Recipient	Signature
Pickup	3/23/2006 2:05:00 PM	GARY	admin	
Delivered	3/24/2006 1:07:00 PM	FRED	admin	
+ 74 - TEST EQUIP RICK	STORE1		SURG1	Return

**Figure 33**

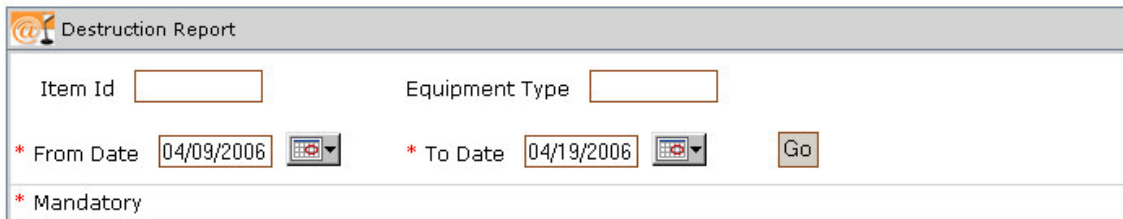
Now you can see that all pertinent information for this item/location is now on this report.

It will display all statuses such as Pickup, Delivered that have been completed and the time of that event.

It will display the UserID (Driver), Recipient, and the signature of the Recipient if acquired.



## **Destruction Report**

This option will provide you with a list of items and their Destruction dates. This report will **ONLY** select items that have been identified as **BOX** types: **Figure 34**



Destruction Report

Item Id  Equipment Type

\* From Date   \* To Date  

\* Mandatory

**Figure 34**


**Item ID** – Enter Item ID you are want to find. Leaving this option blank will return ALL items scheduled for destruction.

**Equipment Type** – Type of equipment to run the report.



**From/To Date** – Enter the through date range. If no items are marked for destruction you will receive the message “No data found”.

When you are satisfied with the above entries, **Click** the **Go** button.






When there is an item marked for destruction and you use this report, you will see the following screen: **Figure 35**

 Destruction Report

Item Id  Equipment Type

\* From Date   \* To Date  

\* Mandatory

Item ID 	Equipment Type 	Description 	Storage Location 	Destruction Date 
12	box	Update Description	Test Vault	1/1/2006
13	box	Up Date Description	Test Vault	1/1/2006
14	box	Up DateDescription	VAULT	1/4/2006
15	box	Supdate Description	VAULT	1/4/2006
16	box	update description	test vault	1/4/2006
17	box	updatedescription	VAULT	1/4/2006
36	box	sdae	zdfth n	1/19/2006
42	Financial Records	Jan 2000 AP records	Hospital	1/21/2006
14	box	DESC 678901234567890123456789012345678901234567890	LOC	1/11/2006

**Figure 35**

**Item ID** – Item ID number scheduled for destruction.

**Equipment Type** – Type of Equipment for this Item.

**Description** – Item description.

**Storage Location** – Physical location where this item is stored.

**Destruction date** – Date this item is scheduled for destruction.

The red triangles at the top of each column indicate that you may sort the data by column by clicking on it.

## Inactivate Items

This option is used to easily “inactivate” multiple items in lieu of inactivating the items one at a time from the Manager Equipment Items option. Selecting the Inactivate Items menu option will give you the following screen: **Figure 36**

Inactivate Items

Select Indicator  \* Date

\* Mandatory

**Figure 36**

From the Select Indicator drop down window, select BOX, EQUIPMENT, or FURNITURE.

Enter a *through date* in the Date field and **Click** the **Go** button: **Figure 37**

Inactivate Items U/I

\* Select Indicator  \* Date

\* Mandatory

Item ID	Equipment Type	Description	Storage Location	Destruction Date	Comments	Inactivate
45	equipment	Patch2601	Warehouse			<input type="checkbox"/>
50	equipment	test no serial	warehouse			<input type="checkbox"/>
68	equipment	RickTest	RickHouse			<input type="checkbox"/>
69	equipment	RickTest2	RickAgain			<input type="checkbox"/>
75	equipment	TEST EQUP RICK NEW	STORE1			<input type="checkbox"/>
40	K-Pads	KPad	DISTCENT			<input type="checkbox"/>
11	tools	plumbing tool kit	tool crib			<input type="checkbox"/>

**Figure 37**

This will display all items that are “active” through and including the chosen date. It will provide you with the Item ID, Equipment Type, Description, Storage Location, Destruction Date, Comments, and an Inactivate check box.

Note that the Inactivate field defaults with a check in the box. This means the item is not yet Inactivated but should be based on Destruction dates.

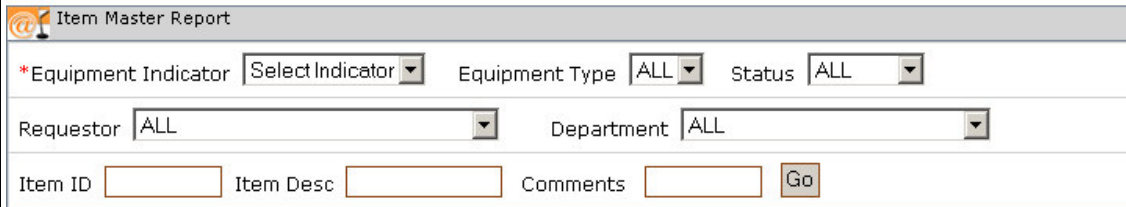
To “inactivate” all items **Click** the **Submit** button.

If you need to “inactivate” only one or two item, check those you want to “inactivate” and **Click** the **Submit** button.



## **Item Master Report**

Selecting the Item Master Report menu option will provide you with the following screen. This report is used to track all the Items: **Figure 38**

The screenshot shows a web-based form titled "Item Master Report". It contains several input fields and dropdown menus. The first row has three dropdown menus: "\*Equipment Indicator" with "Select Indicator" selected, "Equipment Type" with "ALL" selected, and "Status" with "ALL" selected. The second row has two dropdown menus: "Requestor" with "ALL" selected and "Department" with "ALL" selected. The third row has three text input fields: "Item ID", "Item Desc", and "Comments", followed by a "Go" button.

**Figure 38**

**Equipment Indicator** – Drop down window that you are required to select. Choose Box, Equipment, Furniture, or ALL. NOTE: If you select ALL, the Equipment Type drop down window will default to ALL.

**Equipment Type** – Dependent on Equipment Indicator selection. If you choose any option other than ALL from Equipment Indicator, the various Equipment Types will display in this field.

**Status** – setting to choose all items, active items, or inactive items.

**Requestor** – Either run for all which is the default, or select a Requestor from the drop down window.

**Department** - Either run for all which is the default, or select a Requestor from the drop down window.

**Item ID** – Leave blank for all or enter the Item Id.

**Item Description** – Leave bland for all or enter Item Description.

**Comments** – Comments entered during Item creation.

**Click** the **Go** button when all search parameters are entered or you are ready to view the Item Master report.

The following screen is displayed: **Figure 39**

The screenshot shows the 'Item Master Report' window. It includes search filters for Equipment Indicator, Equipment Type, Status, Requestor, and Department, all set to 'ALL'. There are input fields for Item ID, Item Desc, and Comments (containing 'China'), with a 'Go' button. Below the filters is a table with the following data:

Item ID	Equipment Type	Dept ID	Dept Name	Description	Item Qty	Storage Location	Destruction Date	Comments	Status
83	furniture			Rickshaw	1	Warehouse	04/19/2007	This is from China.	Active

**Figure 39**

**Item ID** – Item number.

**Equipment type** – Type of equipment.

**Department ID-** Department ID.

**Department Name** – Department Name item delivered to.

**Description** – Item description.

**Item Qty** – Quantity.

**Storage Location** – Location where the item is stored.

**Destruction Date** – Date item is due to be inactivated or destroyed.

**Comments** – Any additional comments.

**Status** – Item status.

## Equipment Tracking Report

Selecting the Equipment Tracking Report menu option will provide you with the following screen. This report is used to track all your equipment that has been checked out: **Figure 40**

**Figure 40**

You can search by Equipment Type, Serial Number (Serial No), Item Id, Description (Desc), Location, and date range: **Figure 41**

Serial No	Item ID	Item Desc	Equipment Type	Location	Scan Date Time (MM/DD/YYYY HH:MI AM/PM)	Scan User
+ 86	84	Light	equipment	STORE1	4/19/2006 2:59:03 PM	RICK
+ 88	84	Light	equipment	hospital	4/19/2006 2:59:19 PM	RICK

**Figure 41**

The screen above shows the user the Serial Number, Item ID, Item Description, Equipment Type, Location, Scan Date/Time, and Scan User information. To view further historical tracking details simply hit the **+ (plus)** option.

This will display more details and provide a sequential look at an equipments movement within the time frame requested: **Figure 42**

- AA1	74	TEST EQUIP RICK	equipment	STORE1	3/24/2006 12:59:14 PM	RICK
				STORE1	3/24/2006 12:57:52 PM	RICK

**Figure 42**