Cart Count

Web Users Guide

Version 2.6.6

This document is intended for Web Users

501 Kings Hwy East, Fairfield CT 06825 Phone: (888) 647-4621 Fax: (888) 647-4621

Change Record

Date	Author	Version	Change Reference
		001	No previous document
9/30/07	Dan Thomas	1.1	Dot Net update
10/31/2007	Dave Baxter	1.12	Screen shot updates for v2.6.4 TOC and Page 1 updates
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Web User - Login

This section will concentrate on the **@Par Web User's** role and access on the **@Par Server.**

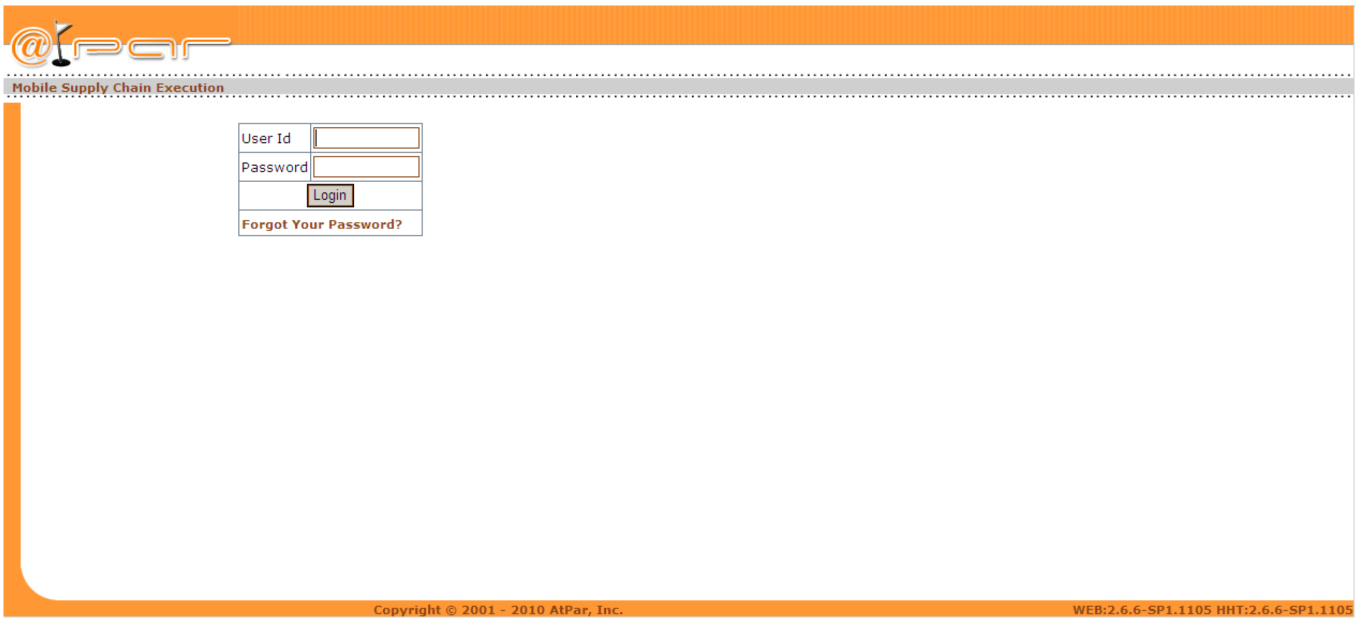

Figure 1

Note: the version number can be found in the bottom right hand corner of the screen. This is an easy way for the **Web User** to find the **@Par** product version for reference. Both the version number for Web (Server), and Client (HHT) is available.

In this release of **@Par** products the **@Par Administrator** must create profiles, users, and parameters before the **Web User** can access the system.

Once a **Web User** has been setup with products, user id, and password, they can login and the following screen will appear ***Figure 2***

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Page Menu Options

Figure 2

The products that appear may be different at your organization. For this document, we will review **Cart Count.**

Home

The **Home** link in the upper right hand section of the screen will return the Web User to the home screen in **Figure 2**. This will return them from any window on the Web Page.

My Profile

Click on the **My Profile** link and **Figure 3** appears

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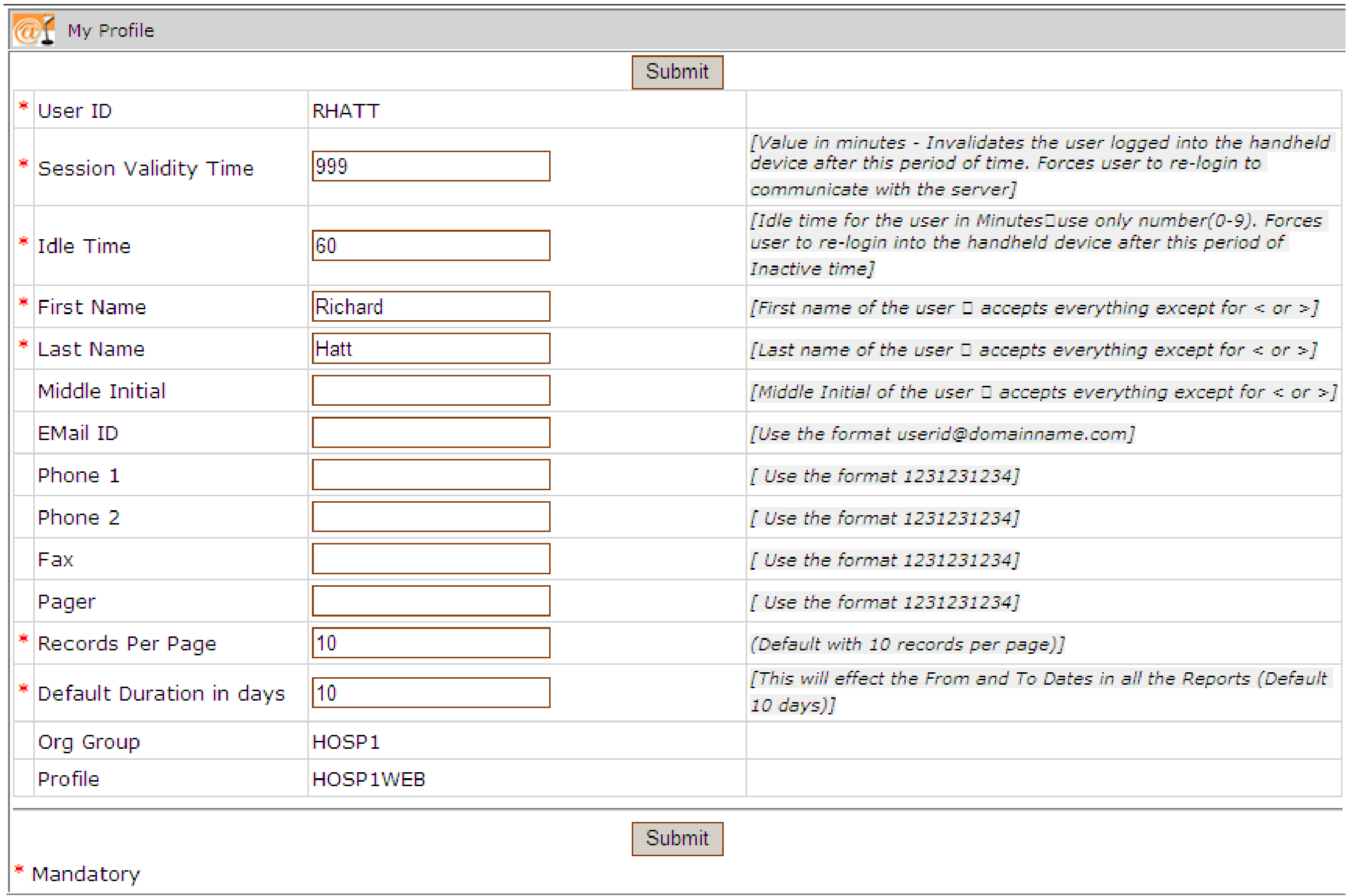
My Profile

Submit

*	User ID	RHATT	
*	Session Validity Time	999	[Value in minutes - Invalidates the user logged into the handheld device after this period of time. Forces user to re-login to communicate with the server]
*	Idle Time	60	[Idle time for the user in Minutesuse only number(0-9). Forces user to re-login into the handheld device after this period of Inactive time]
*	First Name	Richard	[First name of the user accepts everything except for < or >]
*	Last Name	Hatt	[Last name of the user accepts everything except for < or >]
	Middle Initial		[Middle Initial of the user accepts everything except for < or >]
	EMail ID		[Use the format userid@domainname.com]
	Phone 1		[Use the format 1231231234]
	Phone 2		[Use the format 1231231234]
	Fax		[Use the format 1231231234]
	Pager		[Use the format 1231231234]
*	Records Per Page	10	(Default with 10 records per page)]
*	Default Duration in days	10	[This will effect the From and To Dates in all the Reports (Default 10 days)]
	Org Group	HOSP1	
	Profile	HOSP1WEB	

Submit

* Mandatory

Figure 3

The **Web User** uses this section to maintain their user profile. The **Web User** cannot change their User ID as it has been set up by the @Par Administrator and must remain unique.

Session Validity Time and Idle Time are maintained by the @Par Administrator, and should not be changed.

Org Group and Profile are managed by the @Par Administrator.

All other fields can by modified. All mandatory fields are denoted by a * **red asterisk**.

NOTE: In previous versions, the Records per Page and Default Duration in Days were located elsewhere in Parameter settings. They still perform the same functionality but to modify, they must be changed here.

Records Per Page – Value entered to limit the number of records displayed on a single page

Default Duration in days – Value entered to set up date range for reports to run

After making any changes to this screen, you must ***click*** the Submit button to save the change.

Help

Click on the **Help** link and the Help screen appears **Figure 4**

Figure 4

The **Help Manuals** available to your organization will appear. To open any document, ***click*** the link. For example, if you need to review the HHT guide, ***click*** on the **@Par Handheld User Guide**.

All documents are in **.PDF** format and adobe must be installed on your PC in order to open the documents. If you need assistance please see your @Par Administrator or your IT Staff.

Logout

Click the **Logout** to exit the **@Par Web** page.

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Client Installable Files

The links available in this section are used to download the @Par Client software onto your organization's HHTs. For detailed information on this please refer to the **@Par Handheld User Guide**.

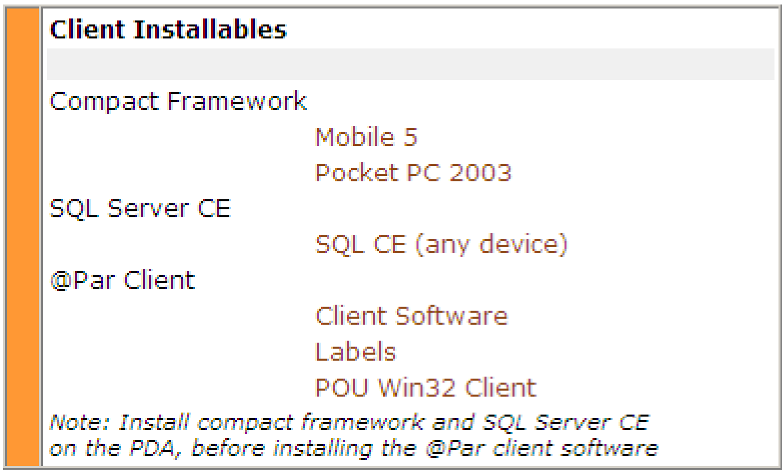

Figure 5

To access the **@Par Handheld User Guide** and all other @Par help files, ***click*** the **Help** link at the top of the screen (***Figure 4***) and select the document to view.

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User Parameters

This section allows the setup of parameters that are specific to a HHT user. ***Click*** the **User Parameters** link and the following screen will appear.

Figure 6

Highlight a user from the **User** drop down and ***click*** the  button **Figure 7**

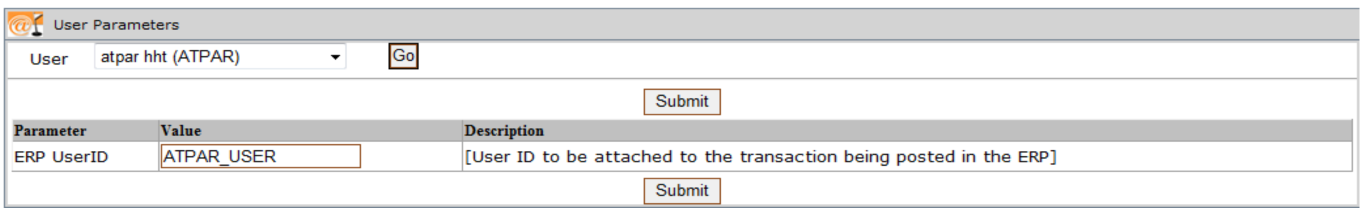

Figure 7

ERP UserID –This is the User ID that will be attached to the transaction in the ERP System. This is not a mandatory field. The @Par Administrator has or needs to setup all other parameters under User Management.

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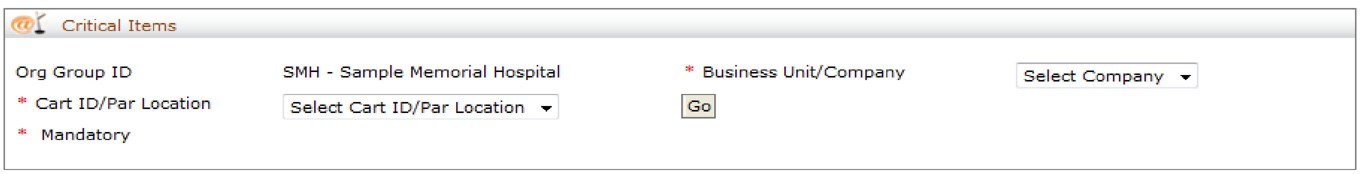
Critical Items

This option has been specifically designed for those ERP systems that do not allow this functionality. PeopleSoft, for example, has this functionality available in the ERP system, but this may also be performed in **@Par Cart Count**.

This option is used to force HHT users to count a specific item on a cart/par location. If there are items you deem necessary to count each and every time the Cart/Par Location is downloaded, regardless of user, this is where you will set it up.

Note: if Allocation of Carts is required, the Web user must have Carts/Par Locations allocated for carts to appear, and carts/par locations must be counted at least once to appear here.

Click on the **Critical Item** link and the following screen appears.


Critical Items

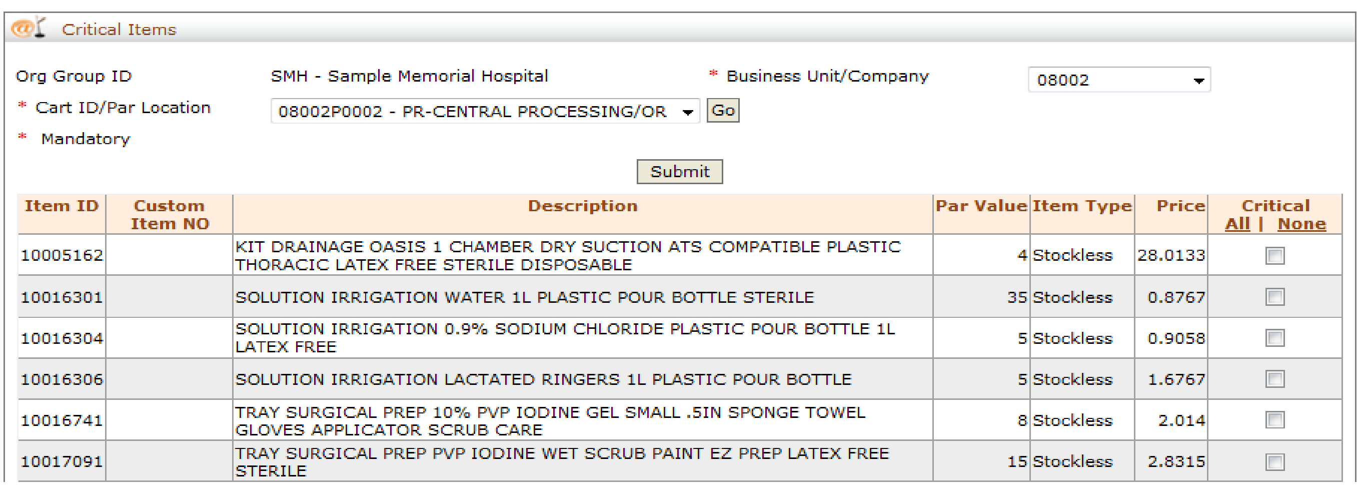
Org Group ID | SMH - Sample Memorial Hospital | * Business Unit/Company | Select Company

* Cart ID/Par Location | Select Cart ID/Par Location | Go

* Mandatory

Figure 8

Select a **Business Unit/Company** and a **Cart/Par Location** from the drop downs and ***click*** the Go button


Critical Items

Org Group ID | SMH - Sample Memorial Hospital | * Business Unit/Company | 08002

* Cart ID/Par Location | 08002P0002 - PR-CENTRAL PROCESSING/OR | Go

* Mandatory

Submit

Item ID	Custom Item NO	Description	Par Value	Item Type	Price	Critical All | None
10005162		KIT DRAINAGE OASIS 1 CHAMBER DRY SUCTION ATS COMPATIBLE PLASTIC THORACIC LATEX FREE STERILE DISPOSABLE	4	Stockless	28.0133	☐
10016301		SOLUTION IRRIGATION WATER 1L PLASTIC POUR BOTTLE STERILE	35	Stockless	0.8767	☐
10016304		SOLUTION IRRIGATION 0.9% SODIUM CHLORIDE PLASTIC POUR BOTTLE 1L LATEX FREE	5	Stockless	0.9058	☐
10016306		SOLUTION IRRIGATION LACTATED RINGERS 1L PLASTIC POUR BOTTLE	5	Stockless	1.6767	☐
10016741		TRAY SURGICAL PREP 10% PVP IODINE GEL SMALL .5IN SPONGE TOWEL GLOVES APPLICATOR SCRUB CARE	8	Stockless	2.014	☐
10017091		TRAY SURGICAL PREP PVP IODINE WET SCRUB PAINT EZ PREP LATEX FREE STERILE	15	Stockless	2.8315	☐

Figure 9

You will see Item ID, Custom Item NO, Description, Par Value, Item Type, Price, and Critical as the column headers in **Figure 9.**

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If you wish to select and designate an item as **Critical**, ***Check*** the box ☐ in the **Critical** column for that item row.

To select all or unselect all as Critical, ***click*** **All** to select and **None** to unselect. **Critical: All | None**.

When done, ***select*** the Submit button.

This will ensure that each time the cart/par location is downloaded the checked items **must** have a value entered before sending the counts to the ERP server.

Allocate Carts

Based on a parameter setting under the **Manage ORG Groups → Assign Parameters → Cart Count** option set by the @Par Administrator in **Figure 10**,

Allocation of Carts to Users Required	☑	[Unchecking this will allow any user to download Any Cart. Checking this will restrict the HHT user download only the carts allocated to the user]

Figure 10

Your organization may require that Carts/Par Locations be allocated to users before users can download information to the HHT. If the parameter in **Figure 10** is checked you **must** allocate carts to users.

There are two methods when downloading carts/par locations from the ERP server to HHTs.

1) Download all carts/par locations at once.
2) Allocating carts/par locations and associated items to users.

Option 2 is highly recommended for peak system performance, especially in organizations with over 25 cart/par locations. Option 1 will download every cart/par location in the ERP system, so download time will be increased.

Option 2 is used to allocate certain carts/par locations to different users. Users that generally count the same carts/par locations can have them assigned by day and time so that when downloading to the HHT the user will get just those areas that have been allocated to them, thus the process time will be greatly decreased.

Clicking on the **Allocate Carts** link gives the following screen.

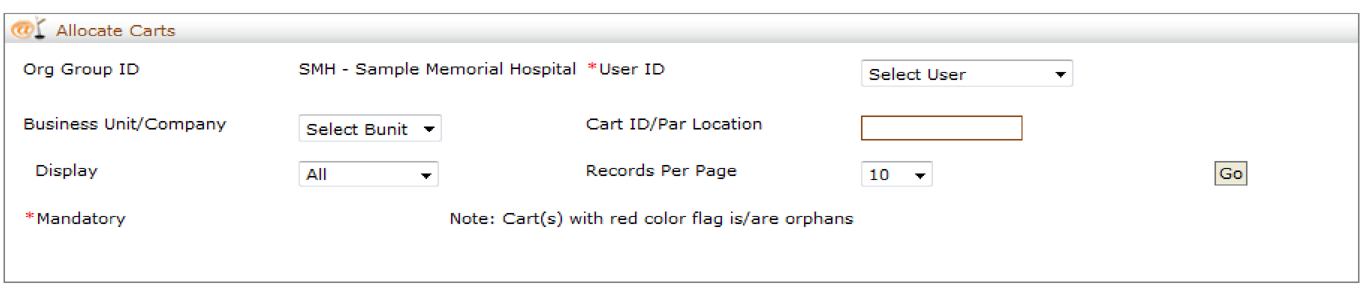

Figure 11

A User ID **must** be selected. The Business Unit/Company and Cart/Par Location fields are searchable by entering complete information, partial information, or leaving blank. (Blank will search for all)

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The Display field allows selection of ALL, Unallocated, or Allocated Carts/Par Locations. For example, if you want to view and assign ONLY those carts that aren't allocated to any users, ***select*** Unallocated.

The Records per page option can be set under Product Parameters. The value entered in this field controls the number of records displayed after all search criteria has been selected and the Allocate Carts screen appears.

Note: Cart(s) with red color flag is/are orphans*

***Orphans –** Records that have information in the @Par database but have been deleted from ERP system. Records become 'orphans' when they are deleted in the ERP System before being unallocated in AtPar. To delete a Cart/Par Location properly, users must first remove allocations from all users in @Par and then delete/remove from the ERP system. Notify the @Par Administrator or @Par Support to clear any orphans.

Select a **User ID** from the drop down list and ***click*** the 

button.

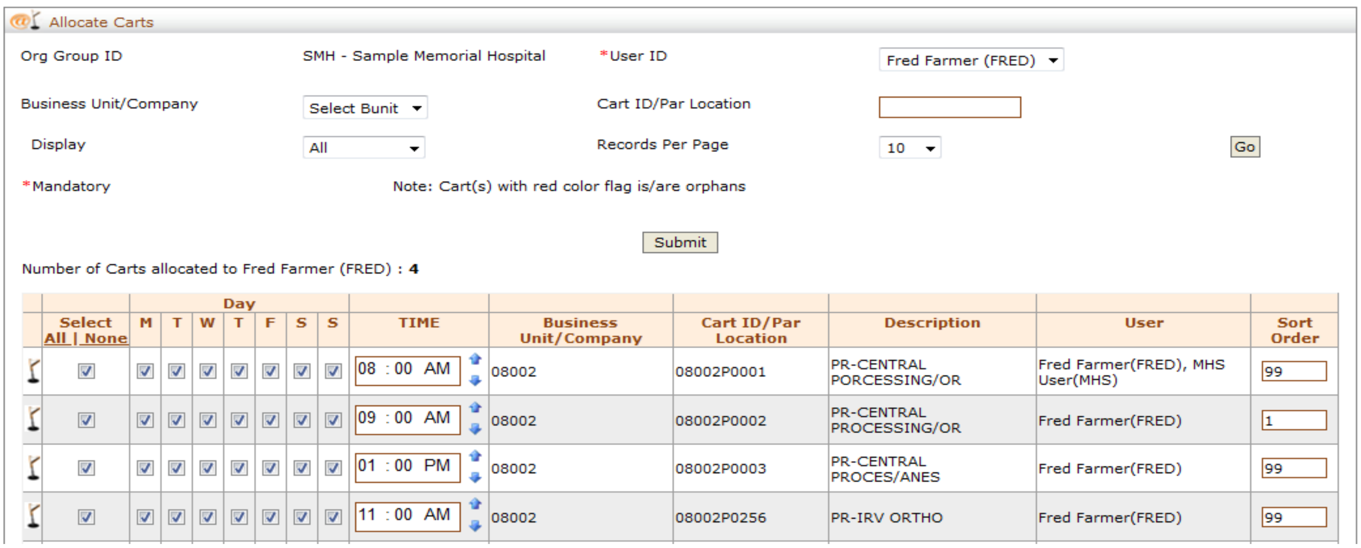

Figure 12

Note: If there are more records to display than is set on Records per Page option from My Profile, on the bottom right screen multiple pages will appear. To move from display screen to display screen simply click on any page number.

Note: The upper portion of the screen will display the number of carts/par locations already allocated to this user.

As you can see on the screen, the columns are **Select, Check box, Day (Monday through Sunday), Time, Business Unit/Company, Cart/Par Location, Description, User and Sort Order**.

Clicking the **Select** check box will place a check mark in this box AND all days for the cart/par location. This was set up so if there are carts/par locations that are counted by this user every day a check mark in this box will assign the cart/par location for every day. If a cart/par location is to be counted on Tuesday and Thursday only, then place a check in the T and T check box only.

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Place a time entry in **Time** option if the cart/par location assigned has to be counted by a certain time. This information will be reflected on the **Schedule Compliance Report** and available to the user's manager/Web user to review.

The **Sort Order** column is to allow setting the order that the carts/par locations will display on the HHT. The order on the HHT will display from top to bottom. So 1 will be at the top and 3 at the bottom. If the sort order is not used, the carts/par locations will appear based on setup from the ERP system. The system will default a 99 in this field for any allocated cart/par location that has been selected.

If you see carts/par locations that this user is not responsible to count, simply leave the cart/par location un-checked.

To save changes ***click*** the Submit button. This will return you to the Allocate Carts screen with the "Updated Successfully" message

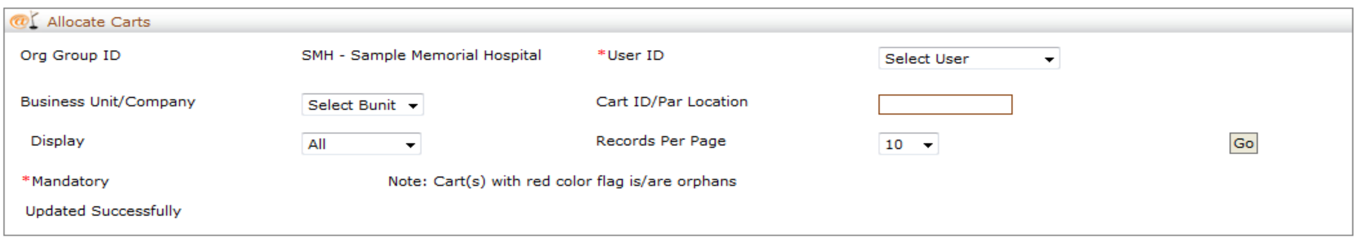

Figure 13

Copy Allocated Carts

When multiple users count the same carts/par locations (i.e. user on Day shift counts same carts/par locations as Night Shift), a quick and easy method to allocate the carts/par locations to users is to use the copy method.

Select a user that has the carts/par locations already allocated to them from the **User ID** drop down. ***Select*** "Allocated" from the **Display** drop down and ***click*** Go .

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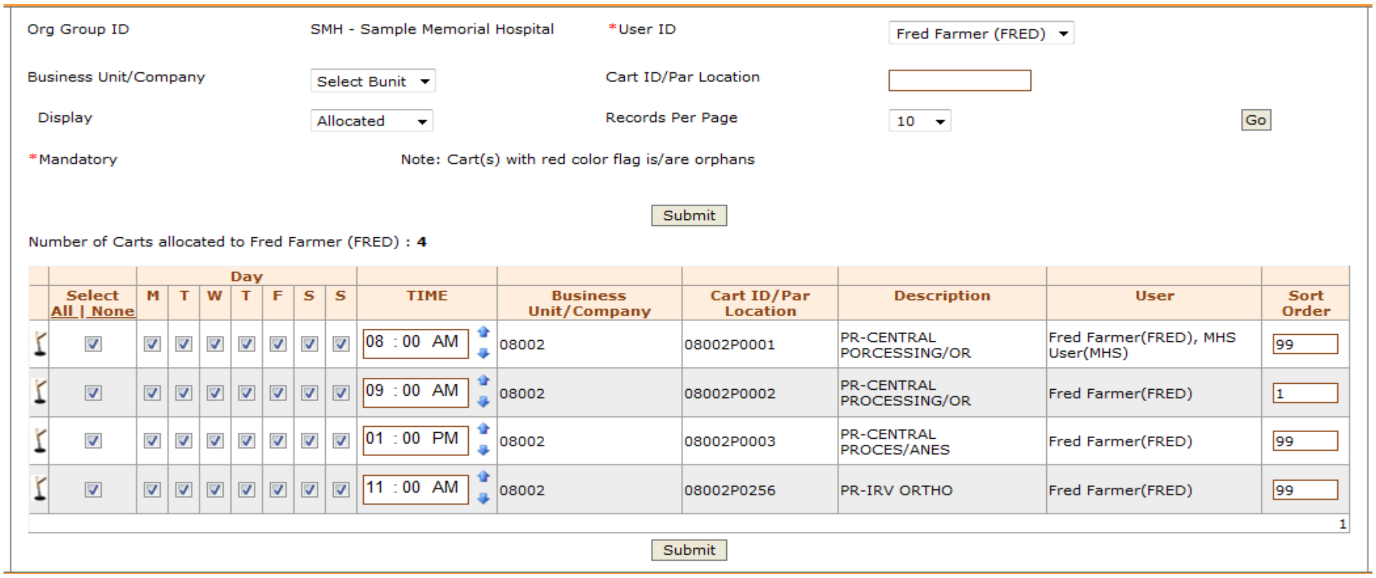
Org Group ID SMH - Sample Memorial Hospital *User ID Fred Farmer (FRED)
Business Unit/Company Select Bunit Cart ID/Par Location
Display Allocated Records Per Page 10 Go
*Mandatory Note: Cart(s) with red color flag is/are orphans
Submit
Number of Carts allocated to Fred Farmer (FRED) : **4**

	Select All | None	M	T	W	T	F	S	S	TIME	Business Unit/Company	Cart ID/Par Location	Description	User	Sort Order
	☑	☑	☑	☑	☑	☑	☑	☑	08 : 00 AM	08002	08002P0001	PR-CENTRAL PORCESSING/OR	Fred Farmer(FRED), MHS User(MHS)	99
	☑	☑	☑	☑	☑	☑	☑	☑	09 : 00 AM	08002	08002P0002	PR-CENTRAL PROCESSING/OR	Fred Farmer(FRED)	1
	☑	☑	☑	☑	☑	☑	☑	☑	01 : 00 PM	08002	08002P0003	PR-CENTRAL PROCES/ANES	Fred Farmer(FRED)	99
	☑	☑	☑	☑	☑	☑	☑	☑	11 : 00 AM	08002	08002P0256	PR-IRV ORTHO	Fred Farmer(FRED)	99

1
Submit

Figure 14

At the bottom of the screen Copy / Move / Delete Carts check boxes are available.

To copy Allocated Carts to another user, ***Click*** in the **COPY** check box, ***Select*** appropriate User from ***the*** **Cart Allocations to User ID** drop down and ***Click*** the Copy button.

If the copy was done correctly you will be returned to the next screen **Figure 15**

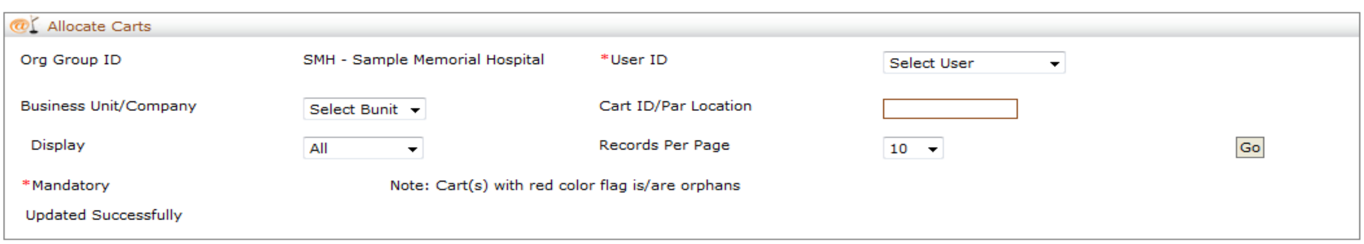
Allocate Carts
Org Group ID SMH - Sample Memorial Hospital *User ID Select User
Business Unit/Company Select Bunit Cart ID/Par Location
Display All Records Per Page 10 Go
*Mandatory Note: Cart(s) with red color flag is/are orphans
Updated Successfully

Figure 15

The copy method will copy all allocated carts from one user to another and keep the allocations with the copied from user.

Move Allocated Carts

The move method will move the allocated carts to another user and **remove** those carts from the original user. This method should be used when an employee departs the organization and carts/par locations are required to be counted by another user.

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Select a user that has the carts/par locations from the **User ID** drop down. **Select** “Allocated” from the **Display** drop down and ***click*** Go

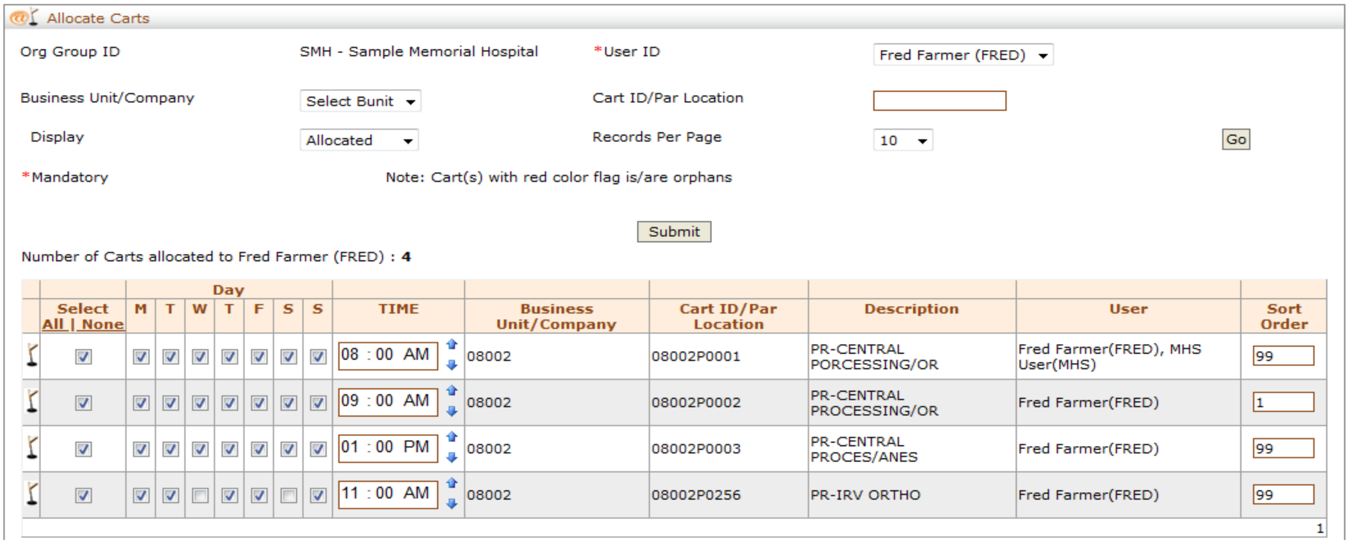

Figure 16

To Move Allocated Carts to another user, ***Click*** in the **MOVE** check box. The COPY button changes in the following screen.

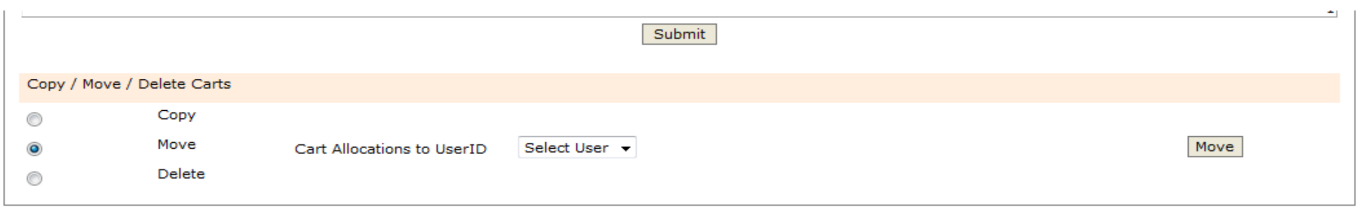

Figure 17

Highlight the **Cart Allocations to User ID** from the drop down and ***Click*** the Move button.

Delete Allocated Carts

The Delete allocated carts function will remove or delete all allocated carts for the selected user.

Select a user that has the carts/par locations from the **User ID** drop down. **Select** “Allocated” from the **Display** drop down. **Figure 18** appears

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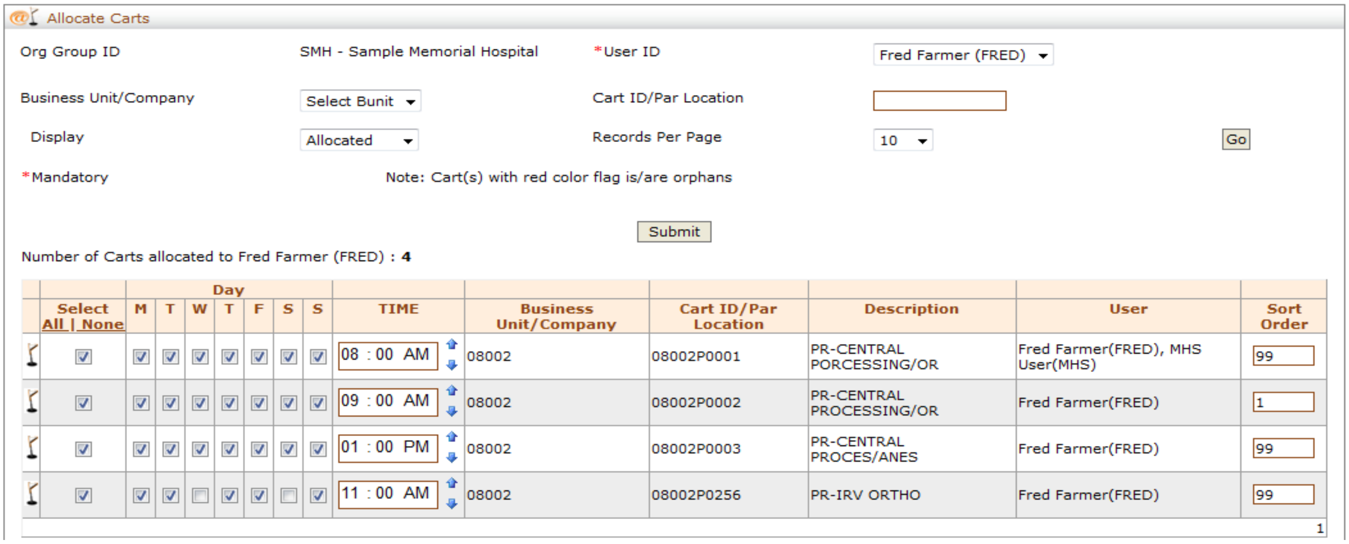

Figure 18

To Delete or remove Allocated Carts from another user, ***Click*** in the **DELETE** check box. The COPY button changes in the following screen.

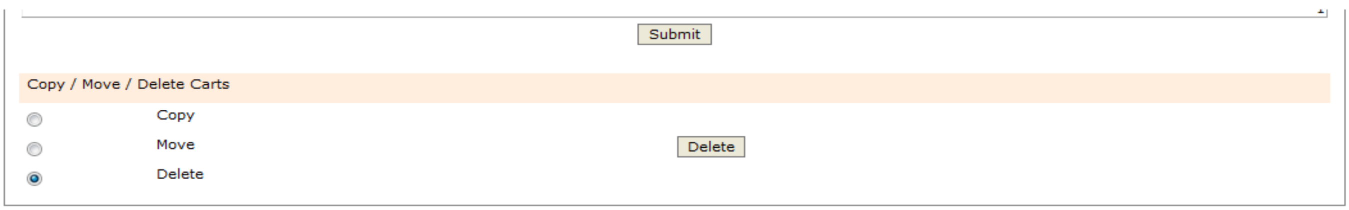

Figure 19

NOTE: The Cart Allocations to UserID drop down disappears. To delete allocated carts from other users, you must select the user to delete from in the USER ID field when first selecting a user.

To delete the allocated carts ***click*** the Delete button.

Order History Report

Order History Report has been developed for the Web user/Supervisor to review the history of carts/par locations that have been counted from the HHT before. This will contain up to the last 5 times a cart/par location has been counted.

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NOTE: The initial count for any cart/par location must be performed from the HHT at least once before the data will appear in the Order History function

Select the **Order History Report** link and the following screen is displayed.

Order History Report

Org Group ID	SMH - Sample Memorial Hospital	* Business Unit/Company	Select Bunit
* Cart ID/Par Location	Select CartID/Par Location	Go	
* Mandatory			

Figure 20

Use the drop down windows to select a **Business Unit/Company** and **Cart/Par Location**, and ***click*** the Go button.

Order History Report

Org Group ID	SMH - Sample Memorial Hospital	* Business Unit/Company	08002
* Cart ID/Par Location	08002P0001 - PR-CENTRAL PORCESSING/OR	Go	
* Mandatory			

Item ID	Custom Item No	Compartment	Description	Price ($)	ParValue	ItemType	UOM	Latest Counts 06/28/2012 09:50:35 Thursday	04/11/2012 09:17:49 Wednesday
10000017		0-0-1	DRAPE TRANSPARENT 51X51IN STERI-DRAPE INCISE ADHESIVE STRIP LATEX FREE STERILE DISPOSABLE	3.619	4	Stockless	EA	3	NC
10000031		0-0-1	DRAPE TRANSPARENT 23X17IN STERI-DRAPE TOWEL ADHESIVE STRIP LATEX FREE STERILE DISPOSABLE	1.038	10	Stockless	EA	3	NC
10000034		0-0-1	DRAPE TRANSPARENT 51X47IN STERI-DRAPE INCISE U SLOT APERTURE LATEX FREE STERILE DISPOSABLE	3.528	5	Stockless	EA	NC	NC
10000049		0-0-1	DRAPE TRANSPARENT 18X9.25IN STERI-DRAPE APERTURE POUCH LATEX FREE STERILE DISPOSABLE	2.772	5	Stockless	EA	NC	NC
10000223		0-0-1	DRAPE TRANSPARENT 23X17IN IOBAN 2 INCISE ANTIMICROBIAL ADHESIVE STRIP	5.688	5	Stockless	EA	NC	NC
10003059		0-0-1	STOCKINETTE ORTHOPEDIC 48X4IN COTTON 2 PLY TUBULAR PRECUT LATEX FREE 48X4IN STERILE	2.1135	5	Stockless	EA	NC	3
10003061		0-0-1	STOCKINETTE ORTHOPEDIC 48X6IN COTTON 2 PLY TUBULAR PRECUT 48X6IN STERILE	2.5822	8	Stockless	EA	NC	NC
10008901		0-0-1	BANDAGE 5YDX4IN STERILE COMPRESSION LATEX FREE ELASTIC CLIP STANDARD	1.4284	4	Stockless	EA	NC	NC
10008902		0-0-1	BANDAGE 5YDX6IN STERILE COMPRESSION LATEX FREE ELASTIC CLIP STANDARD	2.402	4	Stockless	EA	NC	NC
10008942		0-0-1	BANDAGE ESMARK 3YDX6IN STERILE COMPRESSION LATEX ELONGATED	4.5195	4	Stockless	EA	NC	NC

Figure 21

Item ID – Item number

Custom Item No – Custom Item Number from within the Organization's database

Compartment – Compartment number of the item in the cart/par location

Description – Item description **Note:** Description displayed is based on the Org Group Parameter Description Option)

Item Description Option on HHT	○ DESCRSHORT ○ DESCR30 ○ DESCR60 ◉ DESCR254	[Selected description value will be displayed]

Price – Item Price – **Note:** This price is based on the Org Group Parameter Item Price Option

Item Price Option on HHT	(•) STANDARD_PRICE ( ) CURR_PURCHASE_COST ( ) AVG_COST	[Selected Item Price will be displayed in the reports on the server]

Par Value – Item's Par Value at time of count

Item Type – Stock or Non-Stock

UOM – Item's Unit of Measure

Latest Counts – Date and time of the latest five counts (NC = Not Counted)

If the cart/par location has not been counted, uploaded, and processed in ERP system before, you will receive the following screen.

Order History Report				
Org Group ID	SMH - Sample Memorial Hospital		* Business Unit/Company	08004
* Cart ID/Par Location	08004P0042 - PR-L & D/WORK ROOM	Go		
* Mandatory				
No Data Found				

Figure 22

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Create Orders

Create Orders has been developed for several purposes:

1. Resend a count that has been previously counted from the HHT
2. Resend the same count several times – For instance if there is a long weekend approaching and you need to ensure there are enough items to cover the time frame you can send same counts multiple times
3. If your organization uses Wireless environment, and the wireless network is down, you can send counts to the ERP server via this option

NOTE: The initial count for any cart/par location must be performed from the HHT at least once before the data will appear in the Create Orders function

Select the **Create Orders** link and the following screen is displayed.

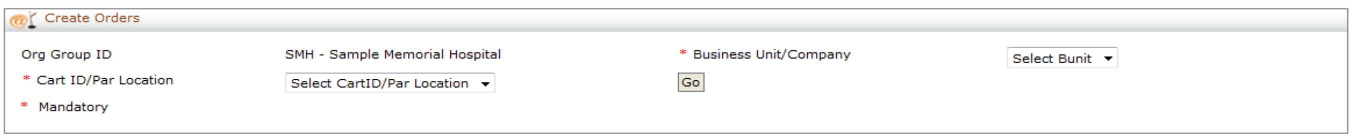
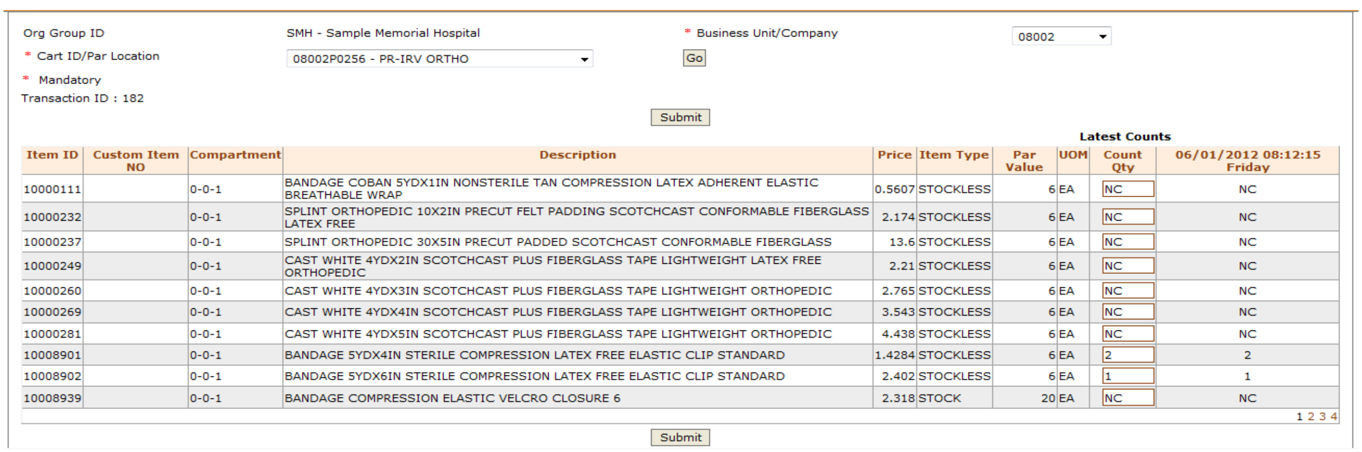


Figure 23

Use the drop down windows to select a **Business Unit/Company** and **Cart/Par Location**, and ***click*** the Go button.



Org Group ID: SMH - Sample Memorial Hospital
* Business Unit/Company: 08002
* Cart ID/Par Location: 08002P0256 - PR-IRV ORTHO
Go
* Mandatory
Transaction ID : 182
Submit

Item ID	Custom Item NO	Compartment	Description	Price	Item Type	Par Value	UOM	Count Qty	Latest Counts 06/01/2012 08:12:15 Friday
10000111		0-0-1	BANDAGE COBAN 5YDX1IN NONSTERILE TAN COMPRESSION LATEX ADHERENT ELASTIC BREATHABLE WRAP	0.5607	STOCKLESS	6	EA	NC	NC
10000232		0-0-1	SPLINT ORTHOPEDIC 10X2IN PRECUT FELT PADDING SCOTCHCAST CONFORMABLE FIBERGLASS LATEX FREE	2.174	STOCKLESS	6	EA	NC	NC
10000237		0-0-1	SPLINT ORTHOPEDIC 30X5IN PRECUT PADDED SCOTCHCAST CONFORMABLE FIBERGLASS	13.6	STOCKLESS	6	EA	NC	NC
10000249		0-0-1	CAST WHITE 4YDX2IN SCOTCHCAST PLUS FIBERGLASS TAPE LIGHTWEIGHT LATEX FREE ORTHOPEDIC	2.21	STOCKLESS	6	EA	NC	NC
10000260		0-0-1	CAST WHITE 4YDX3IN SCOTCHCAST PLUS FIBERGLASS TAPE LIGHTWEIGHT ORTHOPEDIC	2.765	STOCKLESS	6	EA	NC	NC
10000269		0-0-1	CAST WHITE 4YDX4IN SCOTCHCAST PLUS FIBERGLASS TAPE LIGHTWEIGHT ORTHOPEDIC	3.543	STOCKLESS	6	EA	NC	NC
10000281		0-0-1	CAST WHITE 4YDX5IN SCOTCHCAST PLUS FIBERGLASS TAPE LIGHTWEIGHT ORTHOPEDIC	4.438	STOCKLESS	6	EA	NC	NC
10008901		0-0-1	BANDAGE 5YDX4IN STERILE COMPRESSION LATEX FREE ELASTIC CLIP STANDARD	1.4284	STOCKLESS	6	EA	2	2
10008902		0-0-1	BANDAGE 5YDX6IN STERILE COMPRESSION LATEX FREE ELASTIC CLIP STANDARD	2.402	STOCKLESS	6	EA	1	1
10008939		0-0-1	BANDAGE COMPRESSION ELASTIC VELCRO CLOSURE 6	2.318	STOCK	20	EA	NC	NC

1 2 3 4
Submit

Figure 24

If the Supervisor/Web User wants to resend the same counts for the cart/par location, they will select the Submit button.

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It also allows the Supervisor/Web user the ability to edit the Count Qty and resubmit the edited cart/par location by ***clicking*** the Submit button

If the cart/par location has not been counted, uploaded, and processed in PeopleSoft, you will receive the following screen.

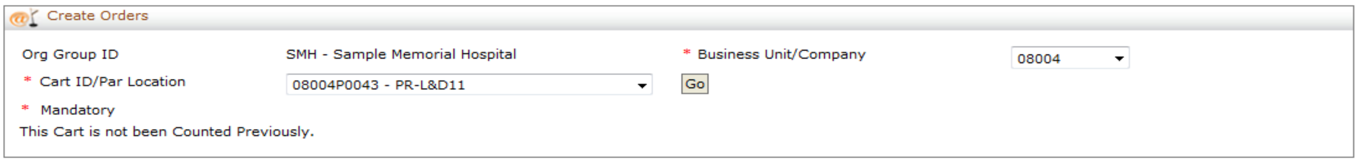

Figure 25

You may also receive the following message when sending orders:

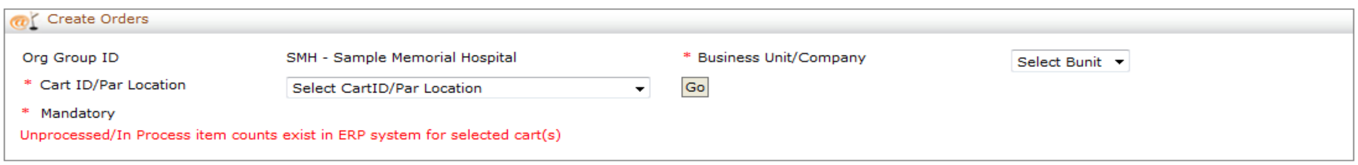

Figure 26

This has same meaning as when HHT user experiences the message. This means that a count for the selected Cart/Par Location exists in the ERP system and must be processed prior to the new count being accepted. Contact your Supervisor to process the previous count before sending the new count again.

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Process Parameters

For organizations that are maintaining Par Location processing through the "Par Management" module, the ability to schedule the processes to run is available. This will allow users to set up a process for a Par Location that when run, will post the information to the server.

Select the **Process Parameters** link and the following screen is displayed.

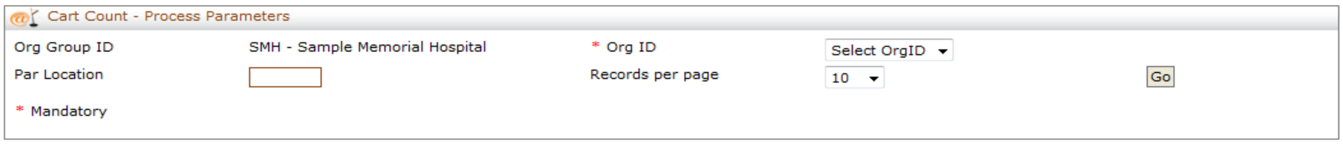

Figure 27

Select an **Org ID** from the drop down list and click the Go button.

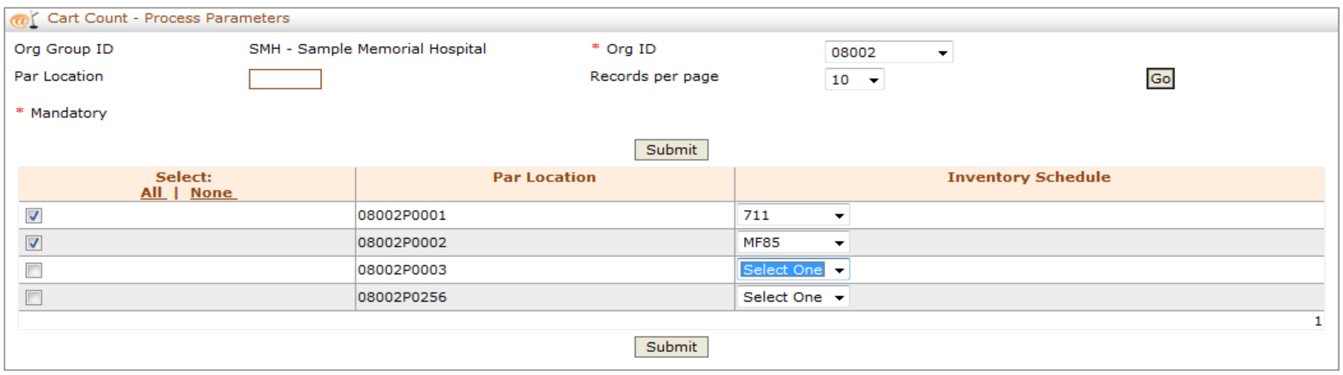

Figure 28

For each allocated Par Location, select an **Inventory Schedule** to process.

Once finished, ***click*** the Submit button.

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Reports

Most of @Par Reports provide the user with the ability to Email the report to other users, Print the report, or copy the report data into an Excel Spreadsheet. After selecting criteria to run in a report and finding data, the following icons will appear in the upper right hand corner of the report

To print the report ***click*** the button

To send the report data to an Excel spreadsheet ***click*** the button

To Email the report ***click*** on the button and the next window will appear.

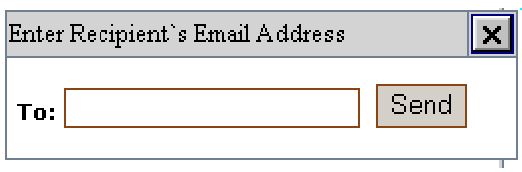


Figure 29

Enter the email address of the person the report is being emailed to and press the Send button. ***Clicking*** the button will cancel and return you back to the report.

NOTE: The email configuration section under Configuration Manager **MUST** be completed for the email functionality to work

To select and modify dates on the reports there are 2 methods:

1. ***Click*** on the existing date and manually type in the date
2. ***Click*** the icon and the following screen appears.
3.

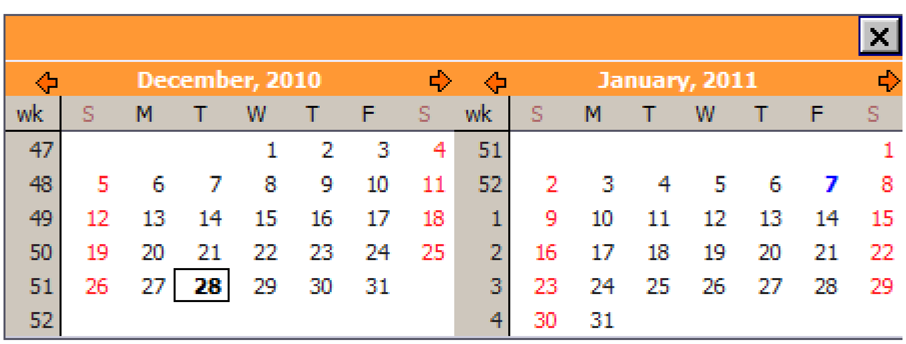


Figure 30

Using the mouse, you can navigate through the calendar and select the From and To date ranges.

Schedule Compliance Report

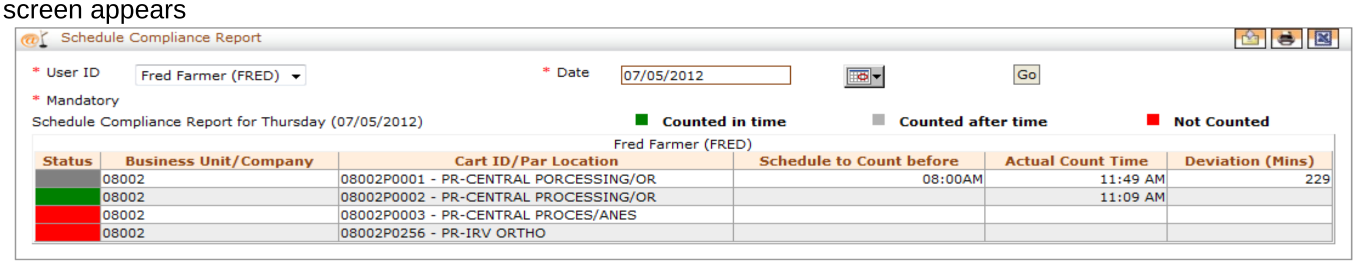
If your organization need carts/par locations counted by a certain time of the day, this report will be very useful to the Supervisor/Web User. When Cart Allocation for Cart/Par Locations are set up with time values entered, this report can be used.

The report is designed for Supervisors/Web Users to view whether the Carts/Par Locations are being counted by the time designated.

Click on the **Schedule Compliance Report** link and the following screen is displayed.

Figure 31

Select a HHT user from the **User ID** drop down and a date. When ready ***click*** the Go button and the following screen appears



Status	Business Unit/Company	Cart ID/Par Location	Schedule to Count before	Actual Count Time	Deviation (Mins)
	08002	08002P0001 - PR-CENTRAL PORCESSING/OR	08:00AM	11:49 AM	229
	08002	08002P0002 - PR-CENTRAL PROCESSING/OR		11:09 AM	
	08002	08002P0003 - PR-CENTRAL PROCES/ANES			
	08002	08002P0256 - PR-IRV ORTHO			

Figure 32

The report lists all Carts/Par Locations by User for the selected date. If Carts/Par Locations are scheduled to be counted on that day, and have NOT been counted, the status will display in **Red**.

If a Cart/Par Location has been counted before the scheduled time the status will display in **Green**

If a Cart/Par Location was counted after the scheduled or desired time, the status will display in **Grey**

The **Actual Count time** will be displayed and any difference from the **Scheduled to count before** time will be listed in the Deviation column.

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Cart Averages Report

This report displays cart/par location count characteristics for a user or all users over a specified date range. Click the Cart Averages Report link and the next screen displays.

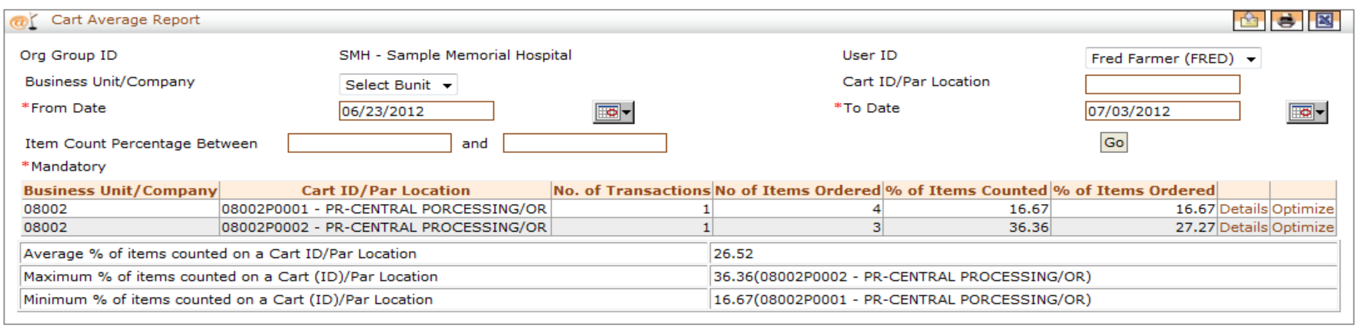

Cart Average Report

Org Group ID: SMH - Sample Memorial Hospital
User ID: All
Business Unit/Company: Select Bunit
Cart ID/Par Location:
*From Date: 06/19/2012
*To Date: 06/29/2012
Item Count Percentage Between ___ and ___
Go
*Mandatory

Figure 33

The User, Business Unit/Company, Cart ID/Par Location, Item Count Percent Between and to fields are all optional search fields. To run this report the Date Range fields are mandatory.

After search criteria have been entered, ***click*** the Go button and the report data appears.


Cart Average Report

Org Group ID: SMH - Sample Memorial Hospital
User ID: Fred Farmer (FRED)
Business Unit/Company: Select Bunit
Cart ID/Par Location:
*From Date: 06/23/2012
*To Date: 07/03/2012
Item Count Percentage Between ___ and ___
Go
*Mandatory

Business Unit/Company	Cart ID/Par Location	No. of Transactions	No of Items Ordered	% of Items Counted	% of Items Ordered		
08002	08002P0001 - PR-CENTRAL PORCESSING/OR	1	4	16.67	16.67	Details	Optimize
08002	08002P0002 - PR-CENTRAL PROCESSING/OR	1	3	36.36	27.27	Details	Optimize

Average % of items counted on a Cart ID/Par Location	26.52
Maximum % of items counted on a Cart (ID)/Par Location	36.36(08002P0002 - PR-CENTRAL PROCESSING/OR)
Minimum % of items counted on a Cart (ID)/Par Location	16.67(08002P0001 - PR-CENTRAL PORCESSING/OR)

Figure 34

If you specify values in the 'Item Count Percent Between' the report search for Carts/Par Locations between those designated percentages. This allows a manager to dynamically vary high and low values of usage characteristics.

Business Unit/Company – Organization's Business Unit or Company

Cart ID/Par Location - Cart ID or Par Location that is counted

FirstName – LastName (UserID) – The First name, last name, and User ID of staff performing the count. Note: This column will only display if User ID is set to ALL. See **Figure 35**.

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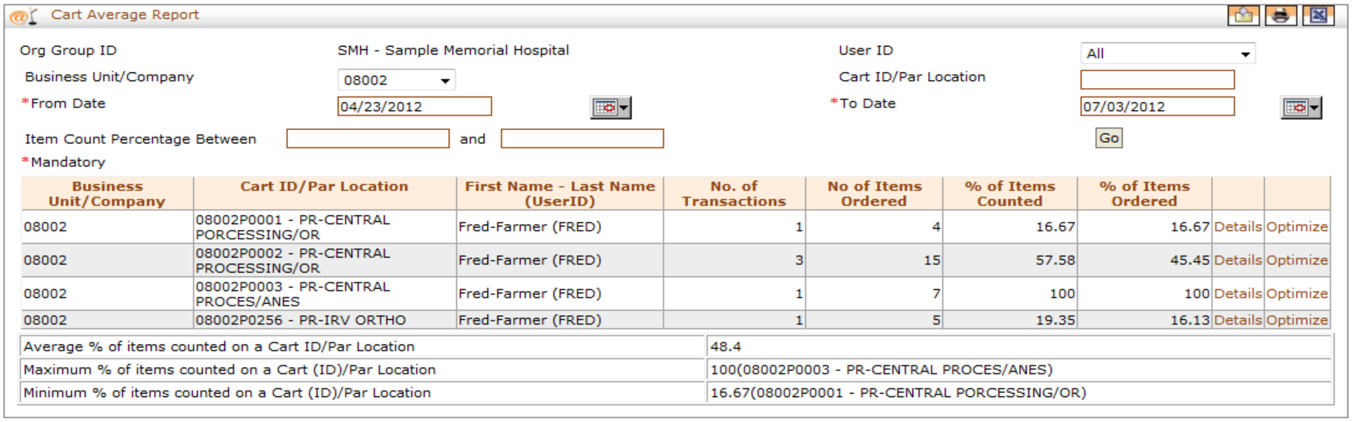

Cart Average Report

Org Group ID: SMH - Sample Memorial Hospital
User ID: All
Business Unit/Company: 08002
Cart ID/Par Location:
*From Date: 04/23/2012
*To Date: 07/03/2012
Item Count Percentage Between ___ and ___
Go
*Mandatory

Business Unit/Company	Cart ID/Par Location	First Name - Last Name (UserID)	No. of Transactions	No of Items Ordered	% of Items Counted	% of Items Ordered		
08002	08002P0001 - PR-CENTRAL PORCESSING/OR	Fred-Farmer (FRED)	1	4	16.67	16.67	Details	Optimize
08002	08002P0002 - PR-CENTRAL PROCESSING/OR	Fred-Farmer (FRED)	3	15	57.58	45.45	Details	Optimize
08002	08002P0003 - PR-CENTRAL PROCES/ANES	Fred-Farmer (FRED)	1	7	100	100	Details	Optimize
08002	08002P0256 - PR-IRV ORTHO	Fred-Farmer (FRED)	1	5	19.35	16.13	Details	Optimize

Average % of items counted on a Cart ID/Par Location	48.4
Maximum % of items counted on a Cart (ID)/Par Location	100(08002P0003 - PR-CENTRAL PROCES/ANES)
Minimum % of items counted on a Cart (ID)/Par Location	16.67(08002P0001 - PR-CENTRAL PORCESSING/OR)

Figure 35

No. of Transactions - Number of times that cart/par location has been transacted over the specified period of time.

No. of Items Ordered - Displays the number of items ordered/counted on the cart/par location. This will be based on whether the Count Qty or Request Qty method is employed.

% of Items Counted – The percentage of items in the cart/par location that have been counted vs. number of items total on the cart/par location

% of Items Ordered – The percentage of items in the cart/par location that have been requested vs. number of items total on the cart/par location

Average % of items counted on a cart - Average percentage of items counted.

Maximum % of items counted on a cart - Displays the Cart ID with the maximum percentage of items counted.

Minimum % of items counted on a cart - Displays the Cart ID with the minimum percentage of items counted.

The **Details** and **Optimize** links are used to open the **Cart Detail Report** or **Optimization Report**, respectively.

The reports will be covered in detail later in this document, but to open the reports simply ***click*** on the link next to the cart/par location.

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Cart Detail Report

This report shows count statistics for a given cart/par location over a specific date range. After ***selecting*** the **Cart Detail Report** link the following screen displays.

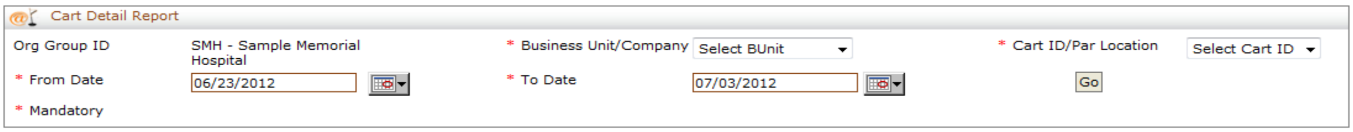
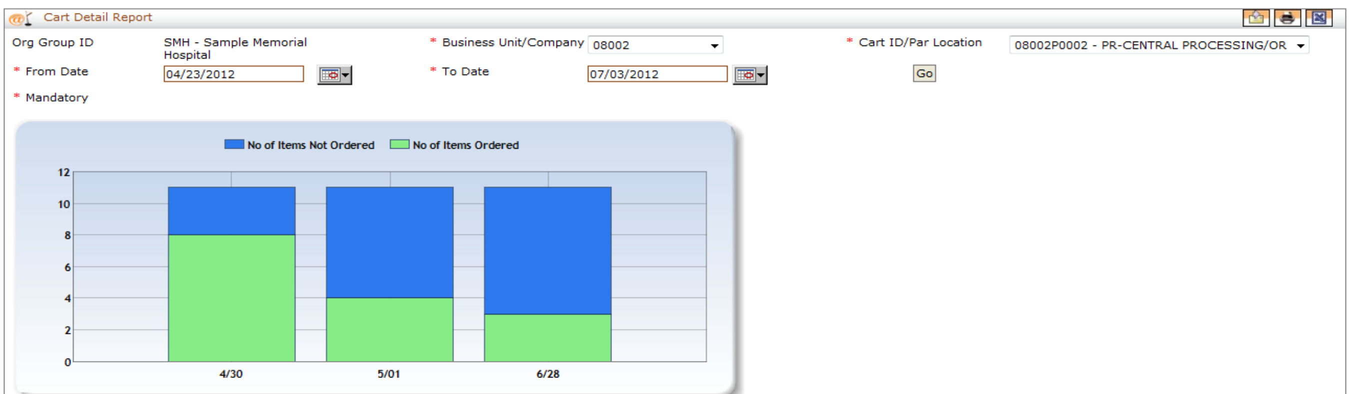


Figure 36

As noted by the **red asterisk**, **Business Unit/Company**, **Cart ID/Par Location** and a **date range** are required search criteria. ***Click*** on the respective fields and click the Go button. The report should display.



Date	User	Total Items	No Of Items Counted	No of Items Ordered	Count Time (Hrs:Mins)	Percentage Counted (%)	Percentage Ordered (%)
4/30/2012 8:06:32 AM	Fred Farmer(FRED)	11	11	8	0:1	100	72.73
5/1/2012 9:25:01 AM	Fred Farmer(FRED)	11	4	4	0:6	36.36	36.36
6/28/2012 9:50:34 AM	Fred Farmer(FRED)	11	4	3	0:0	36.36	27.27

Figure 37

The bar graph in the upper section of the report displays the **number of items not counted/ordered** vs. the total **number of items counted/ordered**.

The items displayed on the detailed section in the bottom portion of the report are:

Date – Date cart/par location was counted

User– AtPar User that performed the count of the cart/par location

Total items - Total number of items on the cart/par location

No. of items counted - Number of items in the cart/par location that were counted using the count method.

No. of items ordered - Number of items in the cart/par location that were ordered using the request method.

Count Time - Total time spent by that user in counting the cart/par location.

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Percentage Counted % - Percentage of items that were counted by that user

Percentage Ordered % - Percentage of items that were ordered by that user

Clicking the **Date/Time** link will take the user to the **Item Exception Report** which is discussed next

Item Exception Report

This report details item exception statistics. The report is very useful to the Supervisor/Web User in determining an items historical exception. The historical data will show Par Level Quantities at the time of ordering, actual orders submitted, and a percentage value to assist the Supervisor/Web user in determining an item's par level for future use.

Click the **Item Exception Report** link and the following screen display***.***

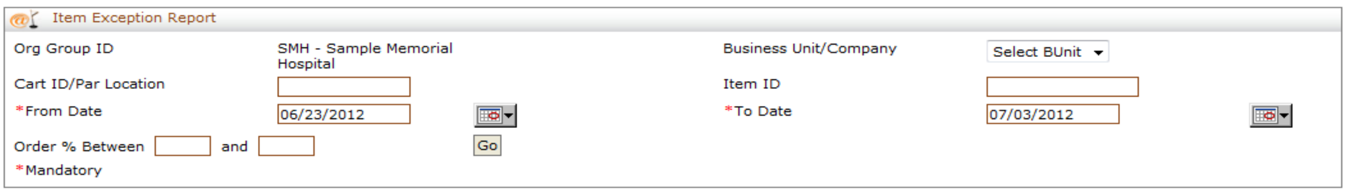
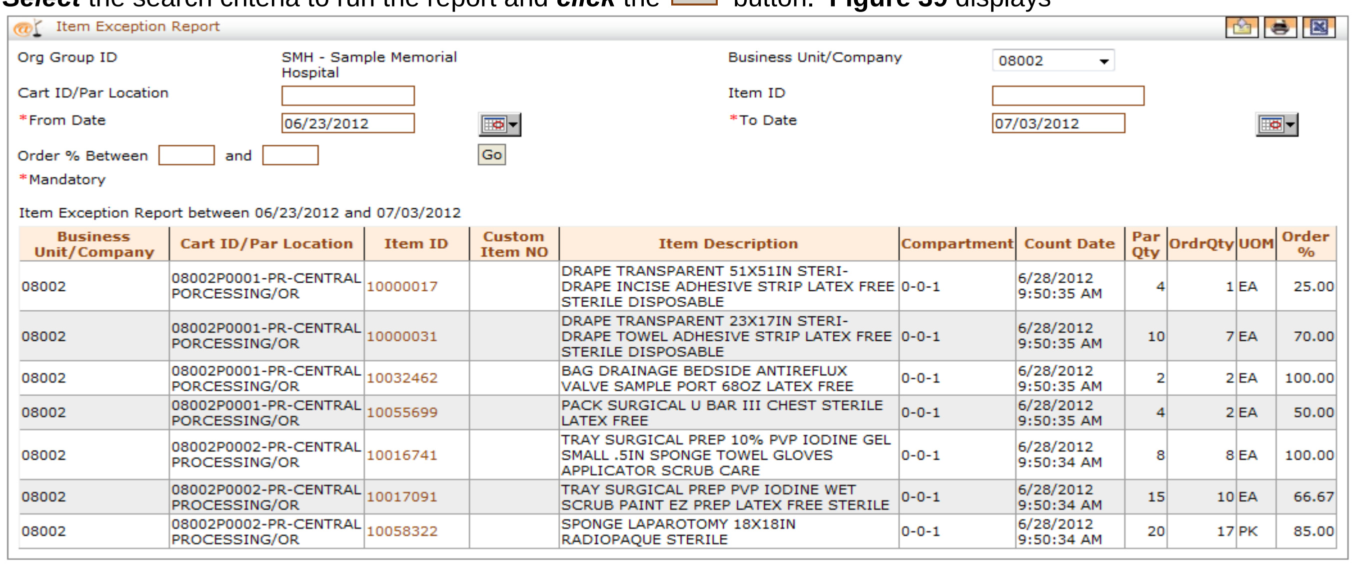


Figure 38

The **Business Unit/Company**, **Cart ID/Par Location, Item ID**, and **Order % Between and** fields are all optional full or partial searches. The **Date Range** is mandatory as noted by a **red asterisk**.

Select the search criteria to run the report and ***click*** the Go button. **Figure 39** displays



Item Exception Report between 06/23/2012 and 07/03/2012

Business Unit/Company	Cart ID/Par Location	Item ID	Custom Item NO	Item Description	Compartment	Count Date	Par Qty	OrdrQty	UOM	Order %
08002	08002P0001-PR-CENTRAL PORCESSING/OR	10000017		DRAPE TRANSPARENT 51X51IN STERI-DRAPE INCISE ADHESIVE STRIP LATEX FREE STERILE DISPOSABLE	0-0-1	6/28/2012 9:50:35 AM	4	1	EA	25.00
08002	08002P0001-PR-CENTRAL PORCESSING/OR	10000031		DRAPE TRANSPARENT 23X17IN STERI-DRAPE TOWEL ADHESIVE STRIP LATEX FREE STERILE DISPOSABLE	0-0-1	6/28/2012 9:50:35 AM	10	7	EA	70.00
08002	08002P0001-PR-CENTRAL PORCESSING/OR	10032462		BAG DRAINAGE BEDSIDE ANTIREFLUX VALVE SAMPLE PORT 68OZ LATEX FREE	0-0-1	6/28/2012 9:50:35 AM	2	2	EA	100.00
08002	08002P0001-PR-CENTRAL PORCESSING/OR	10055699		PACK SURGICAL U BAR III CHEST STERILE LATEX FREE	0-0-1	6/28/2012 9:50:35 AM	4	2	EA	50.00
08002	08002P0002-PR-CENTRAL PROCESSING/OR	10016741		TRAY SURGICAL PREP 10% PVP IODINE GEL SMALL .5IN SPONGE TOWEL GLOVES APPLICATOR SCRUB CARE	0-0-1	6/28/2012 9:50:34 AM	8	8	EA	100.00
08002	08002P0002-PR-CENTRAL PROCESSING/OR	10017091		TRAY SURGICAL PREP PVP IODINE WET SCRUB PAINT EZ PREP LATEX FREE STERILE	0-0-1	6/28/2012 9:50:34 AM	15	10	EA	66.67
08002	08002P0002-PR-CENTRAL PROCESSING/OR	10058322		SPONGE LAPAROTOMY 18X18IN RADIOPAQUE STERILE	0-0-1	6/28/2012 9:50:34 AM	20	17	PK	85.00

Figure 39

Business Unit/Company – Business Unit or Company

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Cart ID/Par Location - Cart ID or Par Location

Item ID – Item ID (***Click*** on a specific **Item ID** to view the item's **Item Usage Report**).

Custom Item No. – Customer Item Number

Item Description - Description of the item from the ERP Database. Note: Description displayed is based on the *Item Description Option* Parameter assigned in Manage Org Group Parameters**.**

Compartment – Lists the Compartment ID of the item, if any.

Count Date – Date and Time at which the item was counted.

Par Qty – Par Quantity specified for that item in the ERP system at the time the count was performed.

Order Qty – The quantity that was ordered for this item.

UOM – UOM specified for this item on Par Level at the time the count was performed.

Order % - Percentage of Order vs. Par Quantity.

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Item Usage Report

This report details usage statistics of counts for a given **Item** across all the carts/par locations it is present in. ***Click*** the **Item Usage Report** link and the screen below appears.

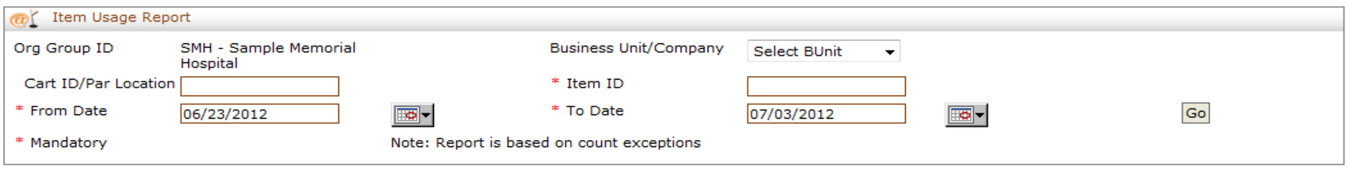

Figure 40

The **Business Unit/Company**, **Cart ID/Par Location** fields are optional search fields. **Item ID** and **Date Range** are mandatory. **Note:** If the Item ID was not mandatory, this would list every item that was listed and may adversely affect the processing time of the report.

After ***entering*** the search criteria ***click*** the Go button and the system provides a line graph indicating **Par Qty vs. Used Quantity** across time.

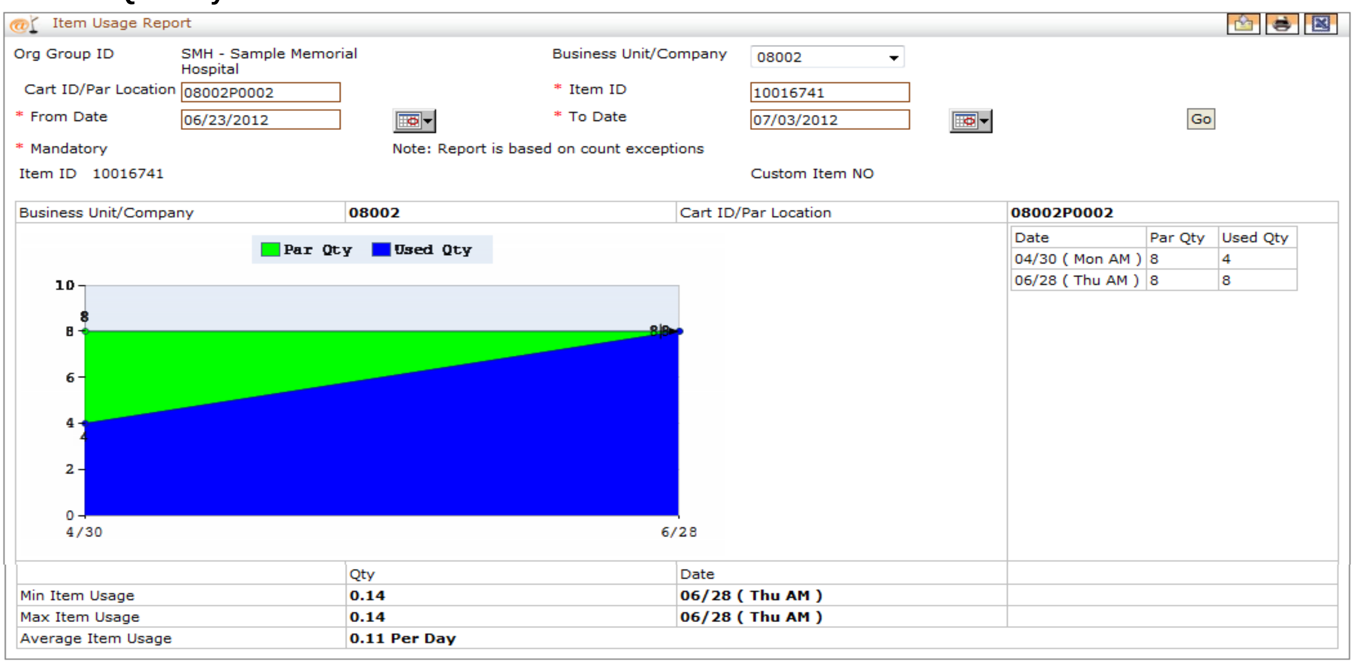

Figure 41

The report will display a line graph depicting Par Quantity at the time the count was performed as well as the Used Quantity.

The detail at the bottom of the report will reflect the Min/Max Usage of the item on the respective cart/s as well as the Average Usage of the item.

NOTE: If an item is selected that is on multiple cart/par locations there will be a graph for each unique cart/par location.

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Optimization Report

The **Optimization Report** is used by Supervisors/Web Users to review a cart/par location's and department's usage of items. This report is extremely useful to determine par level of items.

Click on the **Optimization Report** link the following screen is displayed.

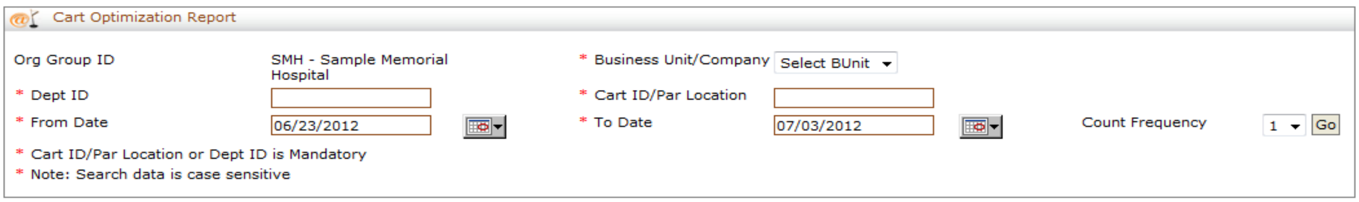

Figure 42

The Supervisor/Web user **MUST** enter a **Dept. ID** or **Cart ID/Par Location**, and **Date Range**. If the required criteria are not selected, the following screen and message will display***.***

Attempting to move forward without selecting a Business Unit/Company will display following message

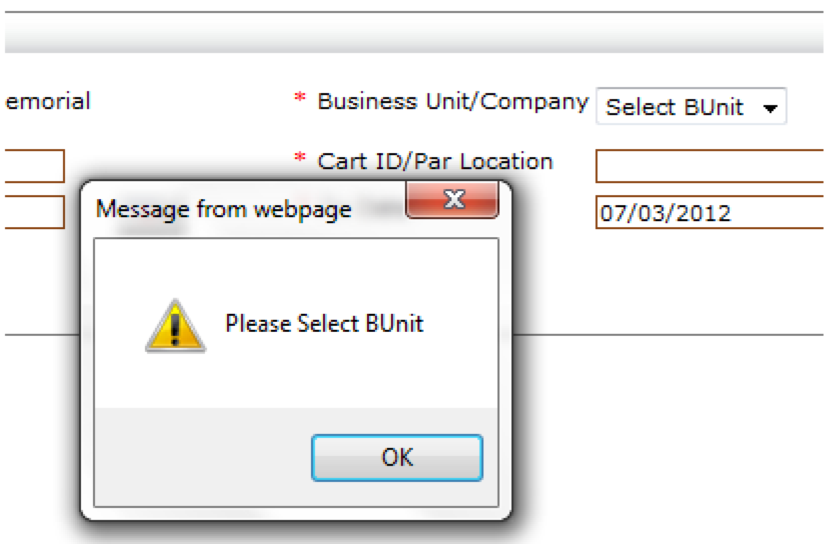

Figure 43

After selecting a Business Unit/Company but not entering a Dept ID or Cart ID/Par Location will display following message

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Cart Optimization Report

Org Group ID: SMH - Sample Memorial Hospital
* Business Unit/Company: 08002
* Dept ID:
* Cart ID/Par Location:
* From Date: 06/23/2012
* To Date: 07/03/2012
Count Frequency: 1 Go
* Cart ID/Par Location or Dept ID is Mandatory
* Note: Search data is case sensitive
CartID or DeptID is mandatory

Figure 44

After selecting required search criteria, click the Go button and the following screen will appear.

Cart Optimization Report

Org Group ID: SMH - Sample Memorial Hospital
* Business Unit/Company: 08002
* Dept ID:
* Cart ID/Par Location: 08002P0001
* From Date: 06/23/2012
* To Date: 07/03/2012
Count Frequency: 1 Go
* Cart ID/Par Location or Dept ID is Mandatory
* Note: Search data is case sensitive

Cart Optimization Report between 06/23/2012 and 07/03/2012

08002 - 08002P0001 PR-CENTRAL PORCESSING/OR

Item ID	Custom Item NO	Description	Compartment	Price ($)	Par Qty	UOM	Max Usage	Min Usage	Avg Usage	Total Usage	Order Qty	Reco. par / day * count freq.
10000017		DRAPE TRANSPARENT 51X51IN STERI-DRAPE INCISE ADHESIVE STRIP LATEX FREE STERILE DISPOSABLE	0-0-1	3.619	4	EA	0.17	0.17	0.17	1	1	1
10000031		DRAPE TRANSPARENT 23X17IN STERI-DRAPE TOWEL ADHESIVE STRIP LATEX FREE STERILE DISPOSABLE	0-0-1	1.038	10	EA	1.17	1.17	1.17	7	7	2
10055699		PACK SURGICAL U BAR III CHEST STERILE LATEX FREE	0-0-1	19.2575	4	EA	0	0	0	0	0	0
10055762		DRAPE SURGICAL 44X40IN FLUID COLLECTION POUCH DRAIN SCREEN UNDER BUTTOCK LATEX FREE STERILE DISPOSABLE	0-0-1	2.599	2	EA	0	0	0	0	0	0
10077742		BAG DRAINAGE 550ML	0-0-1	8.6965	2	EA	0	0	0	0	0	0
10121946		DRAPE EQUIPMENT 74X42IN RADIOLOGY C ARM	0-0-1	2.75	10	EA	0	0	0	0	0	0
Current Value($)	560.97		Recommended Value($)	8.54			Net reduction($)	552.43				

Figure 45

The Supervisor/Web user will now see the information above in **Figure 45**.

Item ID, **-** Item Number

Custom Item No. - Customer Item Number in their database

Item Description – Item Description **(Note:** Description displayed is based on the Org Group Parameter Description Option)

Item Description Option on HHT	◯ DESCRSHORT ◯ DESCR30 ◯ DESCR60 ◉ DESCR254	[Selected description value will be displayed]

Compartment - Compartment number of the item in the cart/par location

Price - Item Price – **Note:** This price is based on the Org Group Parameter Item Price Option

Item Price Option on HHT	◉ STANDARD_PRICE ◯ CURR_PURCHASE_COST ◯ AVG_COST	[Selected Item Price will be displayed in the reports on the server]

Par UOM – Item Par Level and

Max Usage – max item usage

Min Usage – minimum item usage

Avg Usage - average usage of item based on count frequency

Total <u>Usage –</u> <u>total usage of item based on count frequency</u>

<u>Order Qty –</u> <u>total order quantity during searched date range</u>

Reco. Par / day * count freq - Recommended par value for the Item based on calculation.

This report calculates the information slightly different than other @Par reports. It will search the From and To Dates for counts on the Cart ID/Par Location. IF the system only finds ONE day of counts, it will then search back for the last time the counts were performed, and calculate that count to the To date to determine the information.

In ***Figure 38***, you will note that this is a report. There is no editing available to the Supervisor/Web user. However, you may wish to have the Supervisor/Web user that runs the report, also have the ability to EDIT the Par Level.

In Manage Profiles → Assign Parameters under Cart, the @Par Administrator can allow “Edit Par Value“ for this server user.

Edit par value	☑	[Checking this will allow handheld users to edit the Par value on the HHT and the Server users to edit the Par value in the Optimization Report. Audit trail is maintained for all the changes]

Once this parameter is set for the Supervisor/Web user, rerun the report and you will see the following screen.

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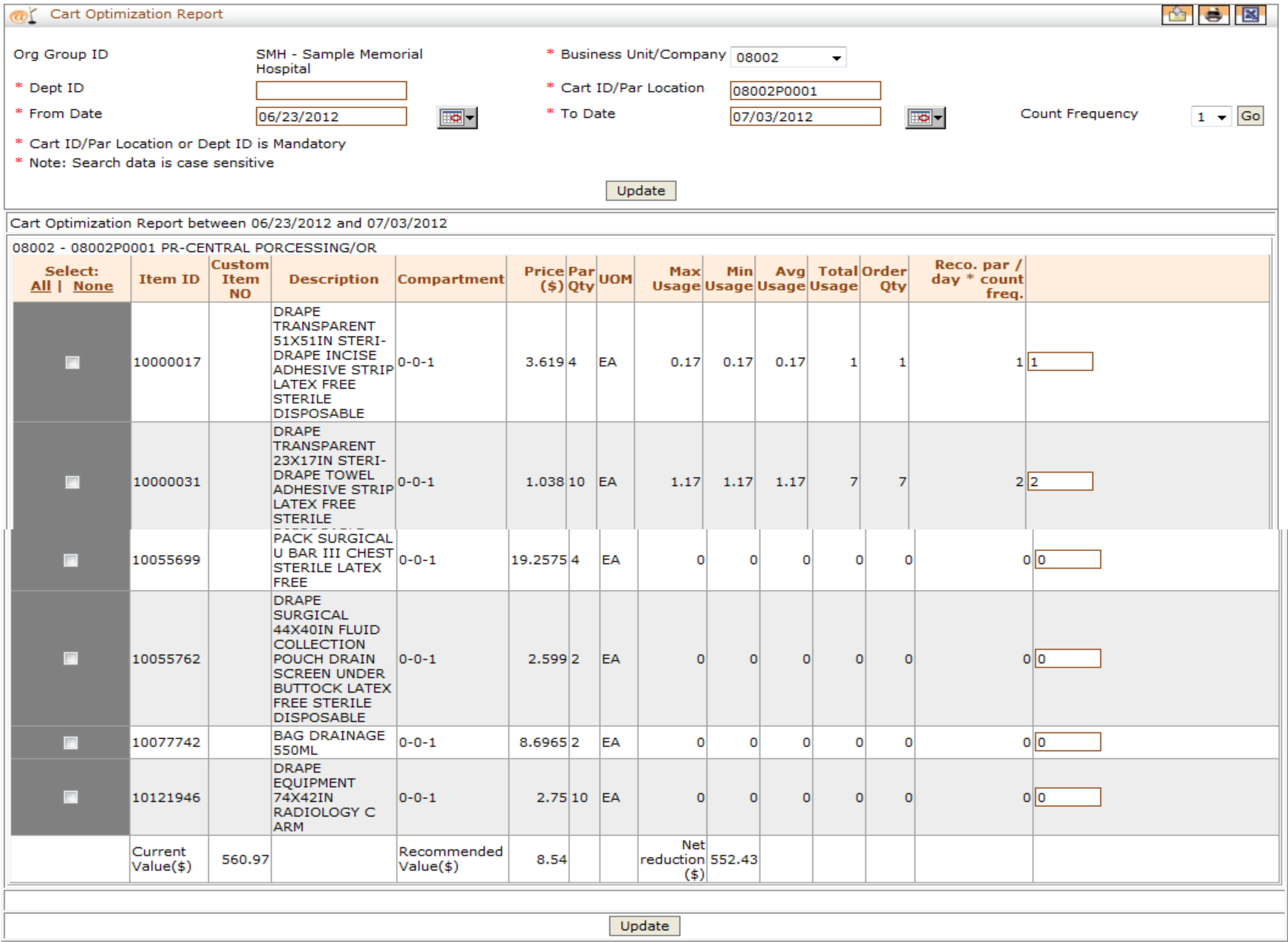

Cart Optimization Report

Org Group ID SMH - Sample Memorial Hospital
* Business Unit/Company 08002
* Dept ID
* Cart ID/Par Location 08002P0001
* From Date 06/23/2012
* To Date 07/03/2012
Count Frequency 1 Go
* Cart ID/Par Location or Dept ID is Mandatory
* Note: Search data is case sensitive
Update

Cart Optimization Report between 06/23/2012 and 07/03/2012

08002 - 08002P0001 PR-CENTRAL PORCESSING/OR

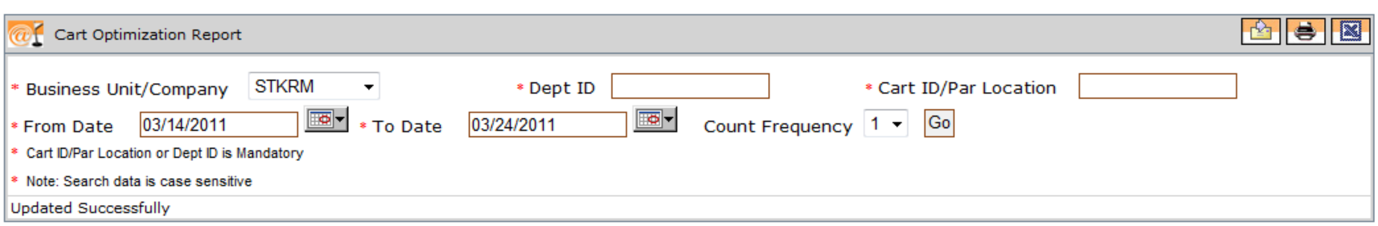
Select: All | None	Item ID	Custom Item NO	Description	Compartment	Price ($)	Par Qty	UOM	Max Usage	Min Usage	Avg Usage	Total Usage	Order Qty	Reco. par / day * count freq.	
	10000017		DRAPE TRANSPARENT 51X51IN STERI-DRAPE INCISE ADHESIVE STRIP LATEX FREE STERILE DISPOSABLE	0-0-1	3.619	4	EA	0.17	0.17	0.17	1	1	1	1
	10000031		DRAPE TRANSPARENT 23X17IN STERI-DRAPE TOWEL ADHESIVE STRIP LATEX FREE STERILE	0-0-1	1.038	10	EA	1.17	1.17	1.17	7	7	2	2
	10055699		PACK SURGICAL U BAR III CHEST STERILE LATEX FREE	0-0-1	19.2575	4	EA	0	0	0	0	0	0	0
	10055762		DRAPE SURGICAL 44X40IN FLUID COLLECTION POUCH DRAIN SCREEN UNDER BUTTOCK LATEX FREE STERILE DISPOSABLE	0-0-1	2.599	2	EA	0	0	0	0	0	0	0
	10077742		BAG DRAINAGE 550ML	0-0-1	8.6965	2	EA	0	0	0	0	0	0	0
	10121946		DRAPE EQUIPMENT 74X42IN RADIOLOGY C ARM	0-0-1	2.75	10	EA	0	0	0	0	0	0	0
	Current Value($)	560.97		Recommended Value($)	8.54			Net reduction ($)	552.43					

Update

Figure 46

To modify the par level of an item, the user will ***click*** on the check box/boxes to the left of the item/s, or use **Select: All | None**, enter the new par level in the respective edit field/s at the end of the line 1, and then ***click*** the Update button.

.Successfully updating the records will display following message.


Cart Optimization Report

* Business Unit/Company STKRM
* Dept ID
* Cart ID/Par Location
* From Date 03/14/2011
* To Date 03/24/2011
Count Frequency 1 Go
* Cart ID/Par Location or Dept ID is Mandatory
* Note: Search data is case sensitive
Updated Successfully

Figure 47

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The Par Audit Report, covered later in this document, is used to track all par level changes.

Daily Activity Report

The daily activity report allows viewing count and putaway performance by all users on a given day. This report is a quick snapshot the Supervisor/Web user can open to review the day's current counts. It is very efficient to track staff performance.

Click the **Daily Activity Report** link and the screen below appears. If Cart Count has been performed only the report appears in **Figure 48** If Putaway only has been performed the report displays in **Figure 49**

Daily Activity Report

* Date 05/01/2012 Go

* Mandatory

			Count				PutAway					
User	Business Unit	InvBUnit	Total Time	# Carts	# Items	Avg. Time Taken For An Item (Secs)	Total Time	# Carts	# Items	Avg. Time Taken For An Item (Secs)		
Fred Farmer (FRED)	08002		6 Mins	1	4	90 Secs					Details	Productivity

Figure 48

Daily Activity Report

* Date 07/05/2012 Go

* Mandatory

			Count				PutAway					
User	Business Unit	InvBUnit	Total Time	# Carts	# Items	Avg. Time Taken For An Item (Secs)	Total Time	# Carts	# Items	Avg. Time Taken For An Item (Secs)		
Fred Farmer (FRED)	08002						1 Mins	1	3	20 Secs	Details	Productivity

Figure 49

User - User that made the count of cart/par location items or putaway count of cart/par location items.

Business Unit – Business Unit that Par Counts/Locations were processed for.

InvBUnit – Inventory Business Unit that Par Counts/Locations were processed for, if exists

Total Time – Recorded in minutes, the number of minutes this user spent counting the cart/par location items.

 # carts – Number of carts/par locations counted.

\# **Items –** Number of items that were counted.

Average time taken for an item (Secs) – Average time taken to count an item, recorded in seconds.

Total Time – Recorded in minutes, the number of minutes this user spent on putaway of the cart/par location items.

 # carts – Total number of carts/par locations putaway.

 # Items – Number of items that were putaway.

Average time taken for an item (Secs) – Average time taken to putaway an item, recorded in seconds.

You will see two highlighted columns at the end, Details and Productivity. The two links will take the user to the **Daily User Activity Report** or to the **User Productivity Report**. This is a shortcut to the respective reports. Both reports will be discussed later in this document.

Click on the ***Details*** link the screen below appears. This is a quicker way to access the Daily User Activity Report.

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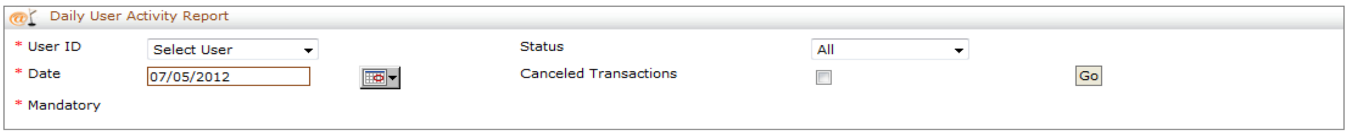
Daily User Activity Report

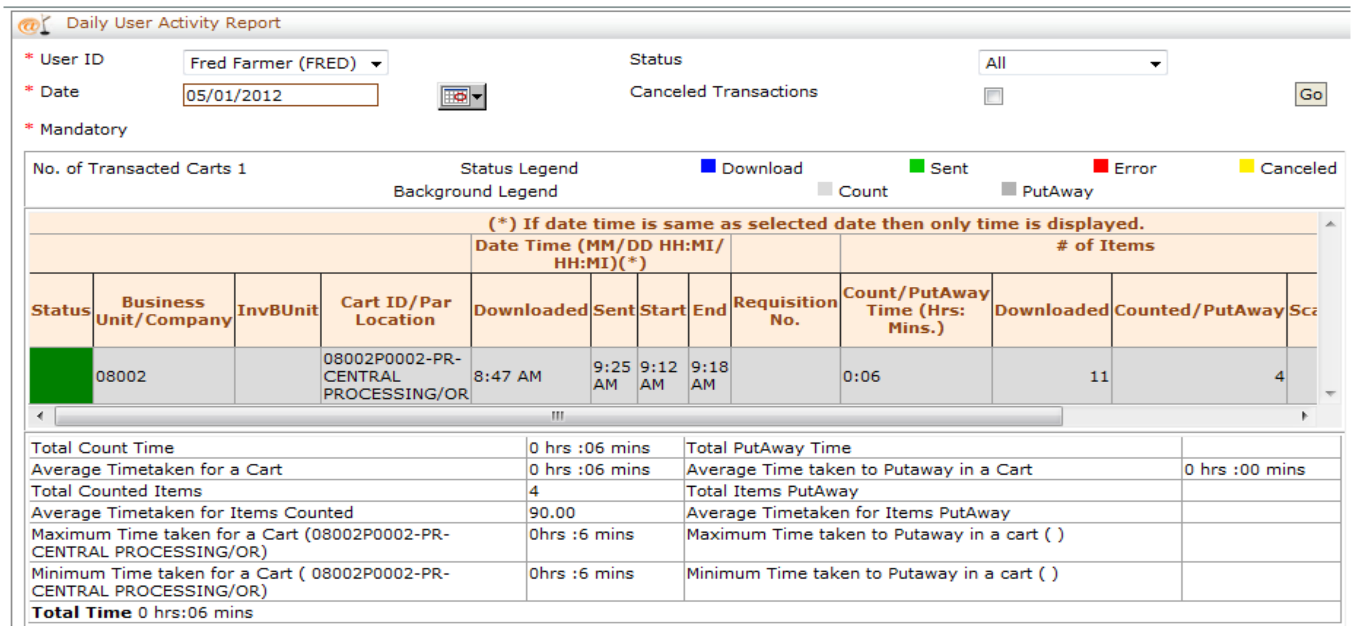
To access the report from outside the **Daily Activity Report *click*** on the Daily User Activity Report link and the same report appears.   To see additional columns use the scroll bar at the bottom of the report.


Daily User Activity Report

* User ID Select User
* Date 07/05/2012
* Mandatory

Status All
Canceled Transactions
Go

Figure 50


Daily User Activity Report

* User ID Fred Farmer (FRED)
* Date 05/01/2012
* Mandatory

Status All
Canceled Transactions
Go

No. of Transacted Carts 1
Status Legend: Download, Sent, Error, Canceled
Background Legend: Count, PutAway

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

				Date Time (MM/DD HH:MI/ HH:MI)(*)						# of Items		
Status	Business Unit/Company	InvBUnit	Cart ID/Par Location	Downloaded	Sent	Start	End	Requisition No.	Count/PutAway Time (Hrs: Mins.)	Downloaded	Counted/PutAway	Sca
	08002		08002P0002-PR-CENTRAL PROCESSING/OR	8:47 AM	9:25 AM	9:12 AM	9:18 AM		0:06	11	4	

Total Count Time	0 hrs :06 mins	Total PutAway Time	
Average Timetaken for a Cart	0 hrs :06 mins	Average Time taken to Putaway in a Cart	0 hrs :00 mins
Total Counted Items	4	Total Items PutAway	
Average Timetaken for Items Counted	90.00	Average Timetaken for Items PutAway	
Maximum Time taken for a Cart (08002P0002-PR-CENTRAL PROCESSING/OR)	0hrs :6 mins	Maximum Time taken to Putaway in a cart ( )	
Minimum Time taken for a Cart (08002P0002-PR-CENTRAL PROCESSING/OR)	0hrs :6 mins	Minimum Time taken to Putaway in a cart ( )	
Total Time 0 hrs:06 mins			

Figure 51

Status – Status of the cart/par location.

Sent = Counted and sent to the ERP
Downloaded = items have been downloaded to the HHT but not counted or sent to the ERP
Error = an error occurred while downloading or uploading the cart/par location,
Canceled = cart/par location was downloaded to HHT never counted and items for the same cart/par location was downloaded again

Business Unit/Company – Business Unit cart is assigned to

Inv BUnit – Inventory Business Unit for cart, if exists

Cart ID/Par Location – Cart ID

Downloaded – Time Cart ID and items are downloaded to the HHT

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Sent – Time the Cart ID and items are sent/uploaded to the ERP system

Start – Time the user enters first count of an item on the HHT

End – Time the user enters the last count of an item on the HHT

Requisition No – (For Par Management users) Requisition ID attached to Par Location Order

Count/Putaway Time (Hrs:Mins) – Time user takes to count items on Cart, displayed in hours and minutes

Downloaded – Total number of items downloaded to the HHT

Counted/Putaway – Number of items counted/putaway

Scanned – Number of items scanned. This is good information to have as the @Par products work with all bar codes and should be utilized to enhance staff performance as well as limit manual errors.

% of items counted/putaway – Percentage of items counted/putaway

Device ID – Device ID that count/putaway was performed on

This report will display the following Statistical Information at the bottom of the report

Total Count Time: .Total time User spent counting Carts/Par Levels

Average Time Taken for a Cart – Average count time per cart

Total Items Counted – Total items counted on all carts and par levels

Average Time Taken for Items Counted – Average count time per item

Maximum Time Taken for a Cart – Displays Cart ID that has taken the most time counting, and displays count time in hours and minutes

Minimum Time Taken fot a Cart – Displays Cart ID that has taken the least time counting and displays count time in hours and minutes

Total Putaway Time: .Total time User spent on Putaway for Carts/Par Levels

Average Time Taken for a Cart – Average putaway time per cart

Total Items Putaway – Total items putaway on all carts and par levels

Average Time Taken for Items Putaway– Average putaway time per item

Maximum Time Taken for a Cart – Displays Cart ID that has taken the most time to putaway, and displays putaway time in hours and minutes

Minimum Time Taken fot a Cart – Displays Cart ID that has taken the least time to putaway and displays putaway time in hours and minutes

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Total Time – Total Time for Count and Putaway of Cart/Par Location items
You can distinguish the Cart Counts from the Cart Putaway functions by the shaded Gray areas. Light Gray will provide you with the Cart Count information, while Dark Gray shaded lines will provide you with the Cart Putaway information.

NOTE: If the shaded area does NOT appear on the report, go to Internet Explorer, Internet Options, select the Advanced Tab, Scroll to the Printer section and check the “Print background colors and images” check box, click on the Apply Tab, and finally click the OK button.

User Productivity Report

The **User Productivity Report** is a graphical report depicting a user’s productivity over a specified time frame.

Select the **User Productivity Report** link and the following screen will display.

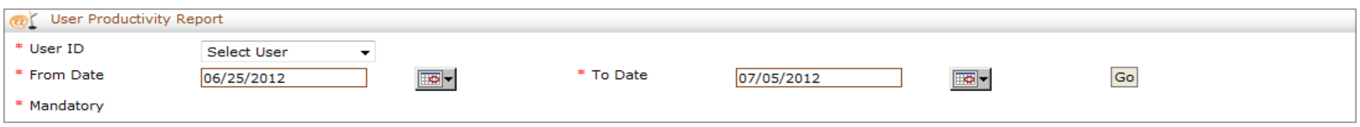
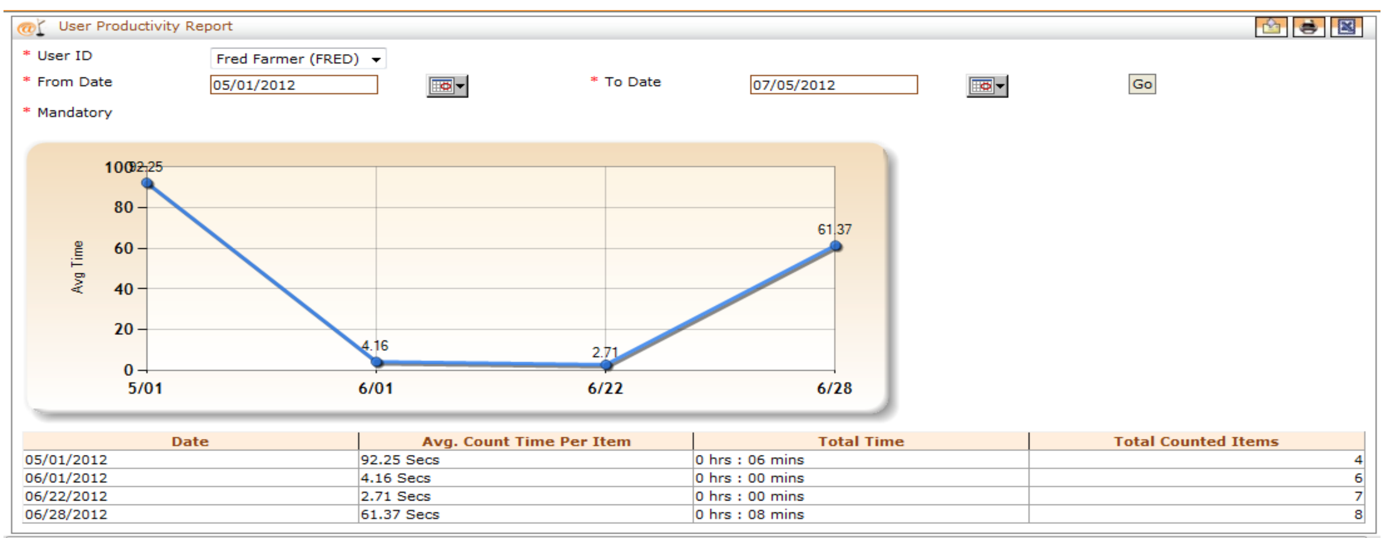


Figure 52

User ID and Date range are mandatory fields. To view a HHT User’s productivity, ***select*** a **UserId** from the drop down and enter a **Date Range**. ***Click*** the Go button and the following graph and report will appear.



Date	Avg. Count Time Per Item	Total Time	Total Counted Items
05/01/2012	92.25 Secs	0 hrs : 06 mins	4
06/01/2012	4.16 Secs	0 hrs : 00 mins	6
06/22/2012	2.71 Secs	0 hrs : 00 mins	7
06/28/2012	61.37 Secs	0 hrs : 08 mins	8

Figure 53

The graph depicts the average count time over a range of time. The more a user enters during the time frame the more useful this report will be for the Supervisor/Web user.

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Date – The date the user counted items

Avg. Count Time Per Item – Time in seconds it took the user to count items

Total Time – Total time user spent counting items

Total Counted Items – Total items the user counted

Cart Putaway Report

The **Cart Putaway Report** records counted and picked items being placed back on Carts/Par Locations. The Cart/Putaway only records items being placed back on respective Carts/Par Locations and does not interface with any tables in the ERP system. The report has been produced solely to allow Supervisor/Web users with a method to view that items were putaway on Carts/Par Locations.

NOTE: Users **MUST** have parameters allowing them to putaway items set in Manage Profiles → Assign Parameters for Cart Count. The @Par Administrator can set the following parameters:

Parameter	Value	Description
Allow users to do only put away of cart items	☐	[Unchecking this will enable the user to do counting and put away. Checking this will restrict the user to do only put away. If parameter "put away of cart items" is unchecked, this parameter does not have any value.]
Putaway of Cart Items	☐	[Checking this will allow the users to do put away of cart items.]

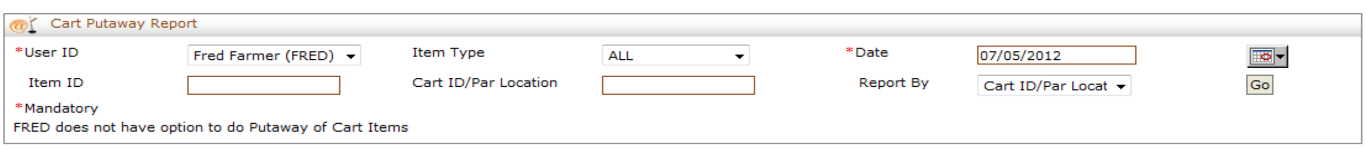


Figure 54

Select the **Cart Putaway Report** link and the following screen displays.

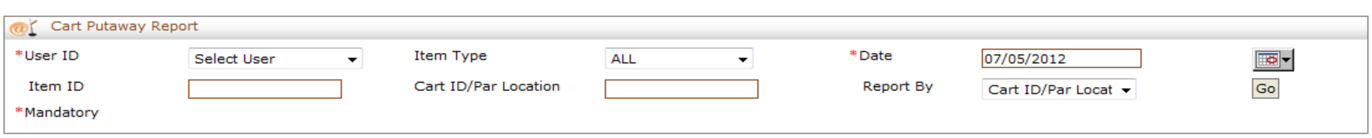
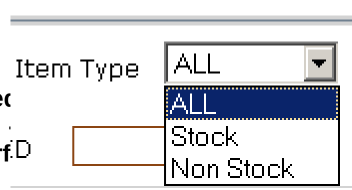


Figure 55

User ID and **Date** are Mandatory Fields.
Select a **User ID** from the User ID drop down list. Select ALL or use drop down window to select **Item Type**



Date will default to today's date. To change, click on calendar button and select the date you want to view the report for.

Figure 56

Item Type, Item ID, and Cart Id/Par Location are optional search fields.

The Report By field allows two selections as seen in the next screen

Figure 57

The Report By field will determine whether the report will be done by Item ID or Cart ID/Par Location. In the next screen the Cart ID/par Location option had been selected.

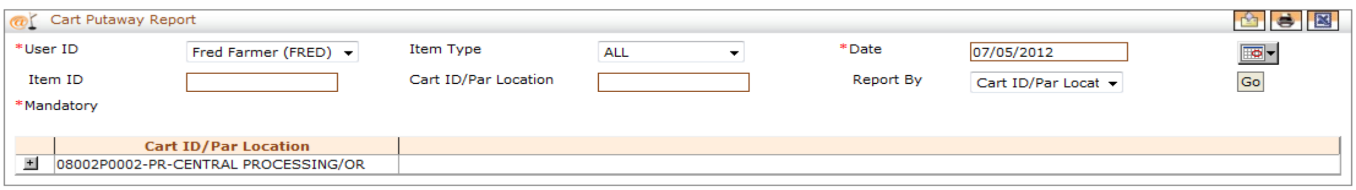
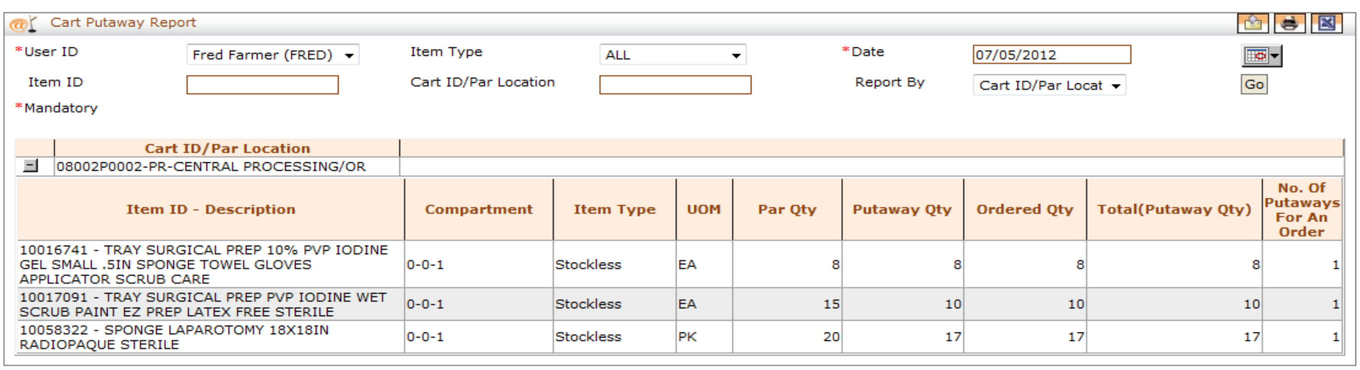


Figure 58

To view details by cart, click on the next to Cart ID/Par Location and the following screen will display.



Item ID - Description	Compartment	Item Type	UOM	Par Qty	Putaway Qty	Ordered Qty	Total(Putaway Qty)	No. Of Putaways For An Order
10016741 - TRAY SURGICAL PREP 10% PVP IODINE GEL SMALL .5IN SPONGE TOWEL GLOVES APPLICATOR SCRUB CARE	0-0-1	Stockless	EA	8	8	8	8	1
10017091 - TRAY SURGICAL PREP PVP IODINE WET SCRUB PAINT EZ PREP LATEX FREE STERILE	0-0-1	Stockless	EA	15	10	10	10	1
10058322 - SPONGE LAPAROTOMY 18X18IN RADIOPAQUE STERILE	0-0-1	Stockless	PK	20	17	17	17	1

Figure 59

The following report will display if you are reporting by Item ID.

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Cart Putaway Report

*User ID Fred Farmer (FRED) Item Type ALL *Date 07/05/2012
Item ID Cart ID/Par Location Report By Item ID Go
*Mandatory

Cart ID/Par Location	Item ID - Description	Compartment	Item Type	UOM	Par Qty	Putaway Qty	Ordered Qty	Total (Putaway Qty)	No. Of Putaways For An Order
08002P0002-PR-CENTRAL PROCESSING/OR	10016741 - TRAY SURGICAL PREP 10% PVP IODINE GEL SMALL .5IN SPONGE TOWEL GLOVES APPLICATOR SCRUB CARE	0-0-1	Stockless	EA	8	8	8	8	1
08002P0002-PR-CENTRAL PROCESSING/OR	10017091 - TRAY SURGICAL PREP PVP IODINE WET SCRUB PAINT EZ PREP LATEX FREE STERILE	0-0-1	Stockless	EA	15	10	10	10	1
08002P0002-PR-CENTRAL PROCESSING/OR	10058322 - SPONGE LAPAROTOMY 18X18IN RADIOPAQUE STERILE	0-0-1	Stockless	PK	20	17	17	17	1

Figure 60

Cart ID/Par Location – The Cart ID/Par Location which this item was Putaway.

Item ID – Description – Will list the Item ID number along with its description if available.

Compartment – Will list the Compartment which this item is Putaway.

Item Type – Item Type (Stock, Non-Stock, Stockless, Consigned)

UOM – The unit of measure of the Item that is being putaway

Par Qty – Item's Par Level Qty at time of Putaway.

Putaway Qty – Qty of Items actually Putaway.

Ordered Qty – Quantity of Items ordered

Total (Putaway Qty) – Qty of Items actually Putaway.

Par Audit Report

The **Par Audit Report** will provide the Supervisor/Web user with a Par Location's historical information or audit report. This will allow the Supervisor/Web user the ability to track all par level qty changes over a specific time frame.

Click on the **Par Audit Report** link and the following screen displays***.***

Par Audit Report

Business Unit/Company Select BUnit Cart ID/Par Location ALL User ID ALL
* From Date 01/01/2011 * To Date 01/11/2011 Go
* Mandatory

Figure 61

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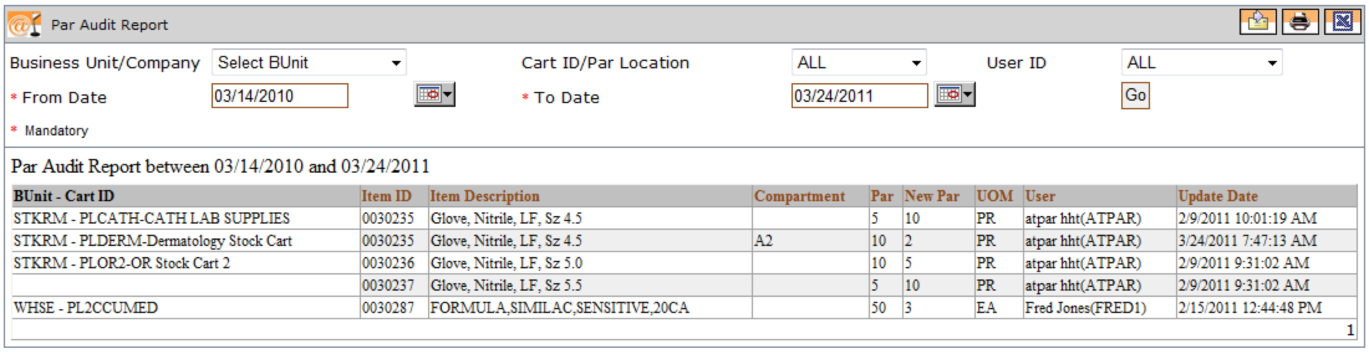
Select a **Date Range** for this report. Selection of a **Business Unit/Company**, **Cart ID/Par Location** and **User ID** are optional. When the criteria is selected ***click*** the Go button



Par Audit Report between 03/14/2010 and 03/24/2011

BUnit - Cart ID	Item ID	Item Description	Compartment	Par	New Par	UOM	User	Update Date
STKRM - PLCATH-CATH LAB SUPPLIES	0030235	Glove, Nitrile, LF, Sz 4.5		5	10	PR	atpar hht(ATPAR)	2/9/2011 10:01:19 AM
STKRM - PLDERM-Dermatology Stock Cart	0030235	Glove, Nitrile, LF, Sz 4.5	A2	10	2	PR	atpar hht(ATPAR)	3/24/2011 7:47:13 AM
STKRM - PLOR2-OR Stock Cart 2	0030236	Glove, Nitrile, LF, Sz 5.0		10	5	PR	atpar hht(ATPAR)	2/9/2011 9:31:02 AM
	0030237	Glove, Nitrile, LF, Sz 5.5		5	10	PR	atpar hht(ATPAR)	2/9/2011 9:31:02 AM
WHSE - PL2CCUMED	0030287	FORMULA,SIMILAC,SENSITIVE,20CA		50	3	EA	Fred Jones(FRED1)	2/15/2011 12:44:48 PM

1

Figure 62

NOTE: When selecting a specific User ID, only the Cart ID/Par Locations that have been allocated to the user will appear in the Cart ID/Par Location drop down

BUnit – Cart ID - Business Unit and Cart/Par Location will display in the first column.

Item ID – Item ID number

Item Description – Item Description
Note: Description displayed is based on the Org Group Parameter Description Option)

Item Description Option on HHT	○ DESCRSHORT ○ DESCR30 ○ DESCR60 ◉ DESCR254	[Selected description value will be displayed]

Compartment - Item compartment if any

Par – Par Level at time of change

New Par - New Par Qty entered

UOM - Item Unit of Measure

User ID - User ID of user that changed the par level. Server Users can change the par level through the **Optimization Report**, HHT Users can change the par level if parameters set in **User Parameters** allow it.

Update Date – Date and time stamp the par level change was done

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MANAGEMENT HEALTH SOLUTIONS

Activity Report

The **Activity Report** will provide the Supervisor/Manager a snap shot of cart/par location activity. Select the **Activity Report** link and the following screen appears.

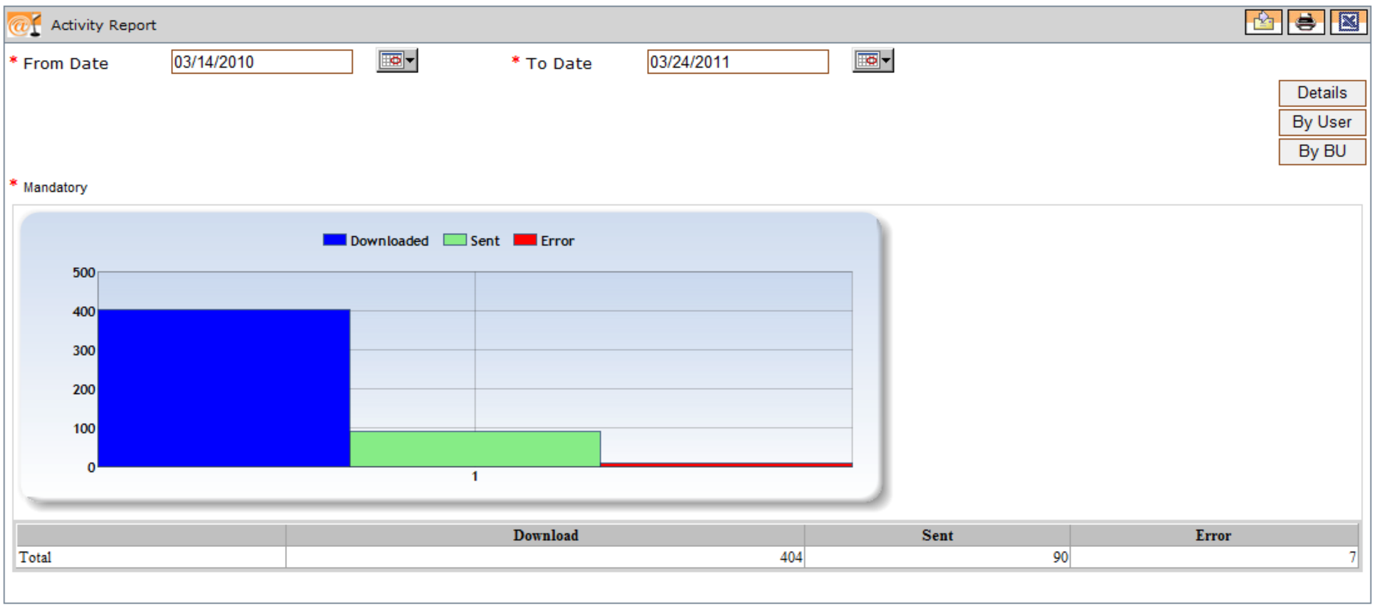

Figure 63

For a given date range, users can see a summary report of Download, Sent and Error status of carts/par locations. Errors refer to errors while uploading data to the ERP system.

This report can be generated per User (By User) and per Business Unit/Company (By BU). **Figure 63** (above) is the screen you will see after you ***select*** **Activity Report** link or the Details button.

Click the By User button and the following screen will appear.

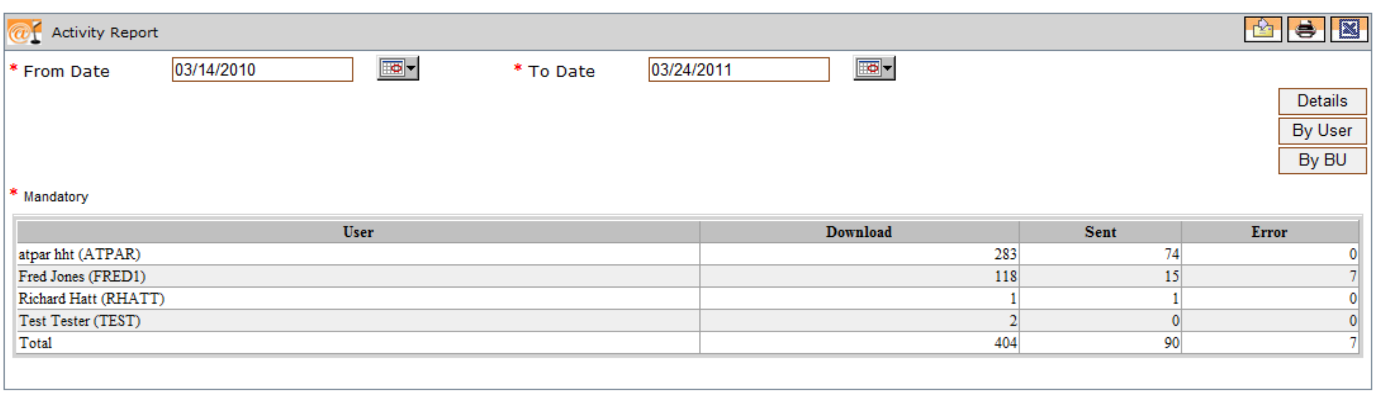

Figure 64

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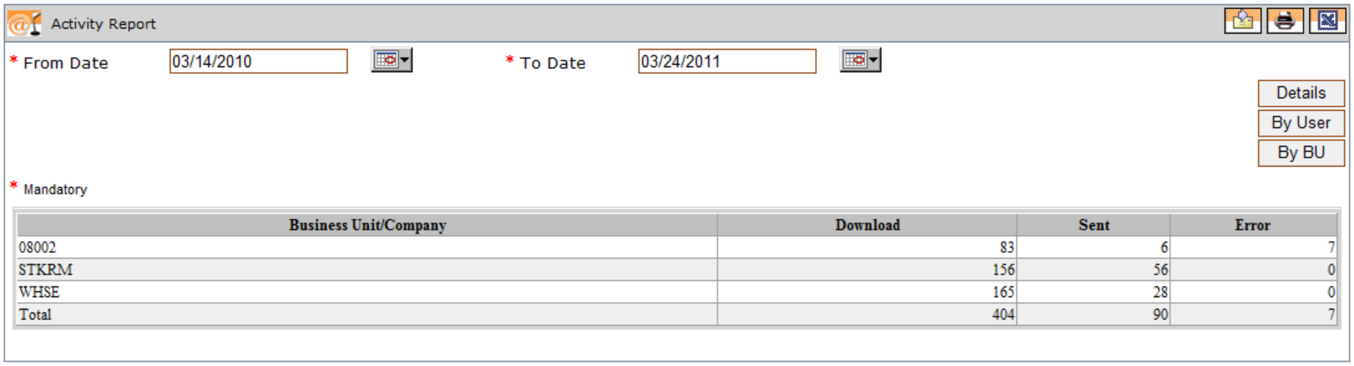
Click the By BU button to see the screen below.



Business Unit/Company	Download	Sent	Error
08002	83	6	7
STKRM	156	56	0
WHSE	165	28	0
Total	404	90	7

Figure 65

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