Stock Issue

Web Guide

Version 2.6.6

This document is intended for Web Server Users

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Change Record

Date	Author	Version	Change Reference
9/23/2008	D. Baxter	v2.6.5.0	New release document
12/01/2009	R. Hatt	V2.6.5	SP12
1/31/2010	S. Godfrey	V2.6.6	
3/28/2010	S. Godfrey	V2.6.6	SP2
9/18/2012	R. Hatt	V2.6.6	SP5

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Introduction to @Par Stock Issue

The **@Par Stock Issue** product allows an organization to create Ad hoc Issues from their inventory without creating Pick lists. Another terminology for this is creating an *"Express Issue".*

Users requiring an item may walk up to a Central Stores Warehouse or even the main warehouse, and ask for an item. The **@Par Stock Issue** Hand Held Terminal (HHT) user will be able to go to the storage location for that item and scan it, entering in the Requestor Location, Department ID, and any other pertinent information necessary based on an organization's requirements. They may also obtain a signature from the Requestor.

When the Issue is sent to the ERP system, the ERP system will automatically deduct or add to the inventories on hand quantity.

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Web User – Login

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

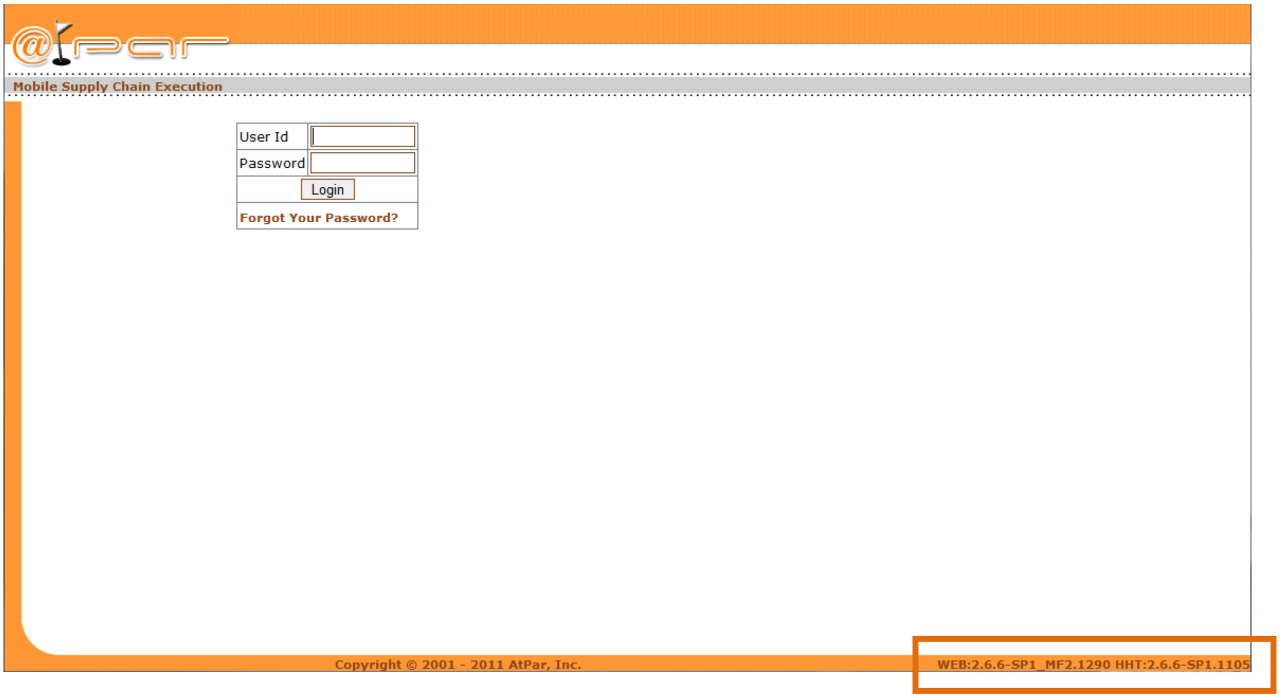

Figure 1

Note: the version number in the bottom right hand corner of the screen. This is a fast way for the **Web User** to find the **@Par** product version for reference. Note the version for Web or @Par 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.

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Page Menu Options

Figure 2

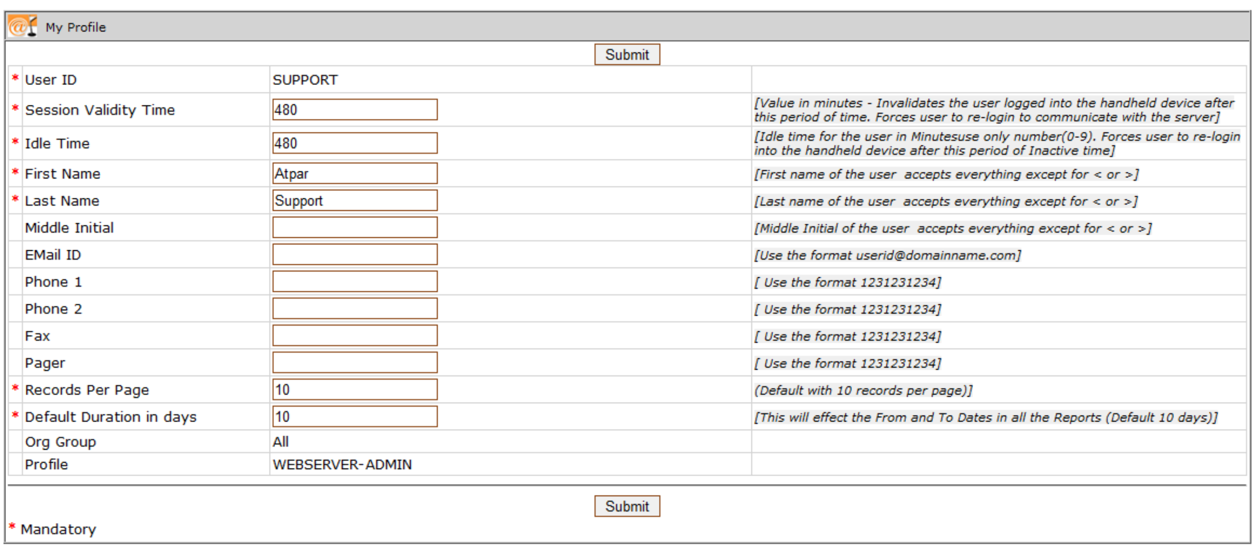
The products that appear may be different at your organization. For this document, we will review **Stock Issue.**

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



My Profile

Submit

* User ID	SUPPORT	
* Session Validity Time	480	[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	480	[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	Atpar	[First name of the user accepts everything except for < or >]
* Last Name	Support	[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	All	
Profile	WEBSERVER-ADMIN	

Submit

* Mandatory

Figure 3

The **Web User** uses this section to maintain their user profile. Note that the **Web User** can't change their User ID. The User ID has been set up by the @Par Administrator and must remain unique.

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Session Validity Time and Idle Time are maintained by the @Par Administrator.

Org Group and **Profile** are maintained by the @Par Administrator and are not editable.

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

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

Home My Profile Help Logout

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

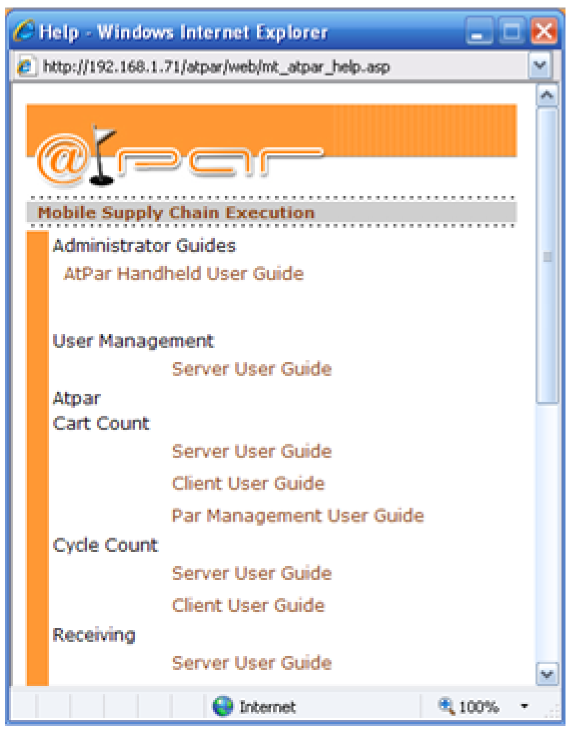

Figure 4

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

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Home My Profile Help Logout

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

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 **AtPar Handheld User Guide**.

Client Installables

Compact Framework
- Mobile 5
- Pocket PC 2003

SQL Server CE
- SQL CE (any device)

@Par Client
- Client Software
- Labels
- POU Win32 Client

Note: Install compact framework and SQL Server CE on the PDA, before installing the @Par client software

Figure 5

To access the **AtPar Handheld User Guide** and all other AtPar help files, ***click*** the **Help** link at the top of the screen **Figure 2** and select the document to view.

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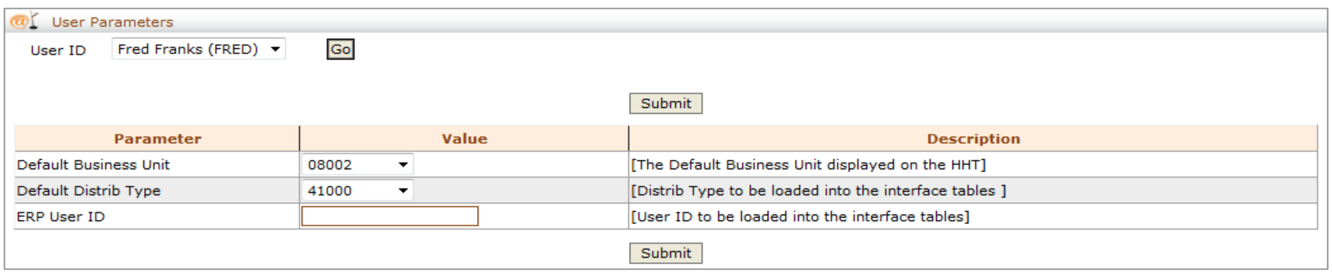
User Parameters

This menu section will allow Web Users the ability to further define parameters for HHT users. Most parameters are set under profiles and organizational parameters, but some products allow further HHT user defined parameters.

Click on **User Parameters** from the Stock Issue menu to open the User Parameters screen **Figure 6**.

Figure 6

Select a User from the drop down list and ***click*** on the Go button **Figure 7**



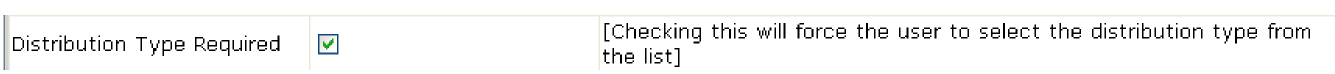
Parameter	Value	Description
Default Business Unit	08002	[The Default Business Unit displayed on the HHT]
Default Distrib Type	41000	[Distrib Type to be loaded into the interface tables]
ERP User ID		[User ID to be loaded into the interface tables]

Figure 7

Default Business Unit – Enter a Business Unit as a default for the User. This is useful for the HHT user that generally issues items from a Business Unit for a greater percentage of time. This data will default on the HHT so user doesn't have to enter a Business Unit for those items they order most of the time. If they do move to another Business Unit they can simply overwrite the default Business Unit on the HHT.

Default Distrib Type* - Enter a Distribution Type as a default for the User. This is useful for the HHT user that generally issues items from a Distribution Type a greater percentage of time. This data will default on the HHT so user doesn't have to enter a Distribution Type for those items they order most of the time. If they do move to another Business Unit they can simply overwrite the default Distribution Type on the HHT.

Note: Setting this default is highly recommended if the following **Org Group** parameter is selected:



User ID – This will be populated with the required User ID required for the interface tables. This will vary based on type of ERP system your organization uses. If you have questions, please contact your @Par Administrator or @Par Support team.

After entering the desired data ***click*** the Submit button.

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Allocate Inventory Business Units

Selecting this menu option displays the choices shown in **Figure 8** which allows user to Allocate Inventory Business Units that are specific to a given HHT user.

Note: The Business Unit **MUST** be allocated to the ORG Group to be available for allocation.

Select a mandatory *** User ID** from the drop down menu. Then ***TAP*** Go

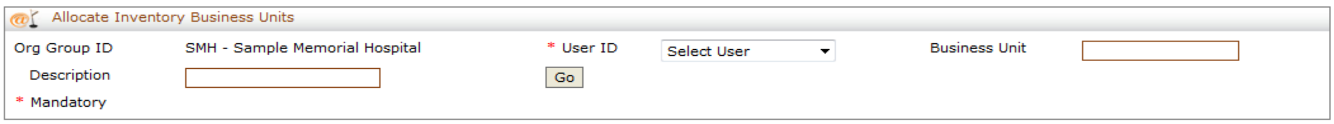

Figure 8

You can also filter by **Business Unit** or **Description** if needed. If no filters are used all Business Units will display as shown in **Figure 9**.

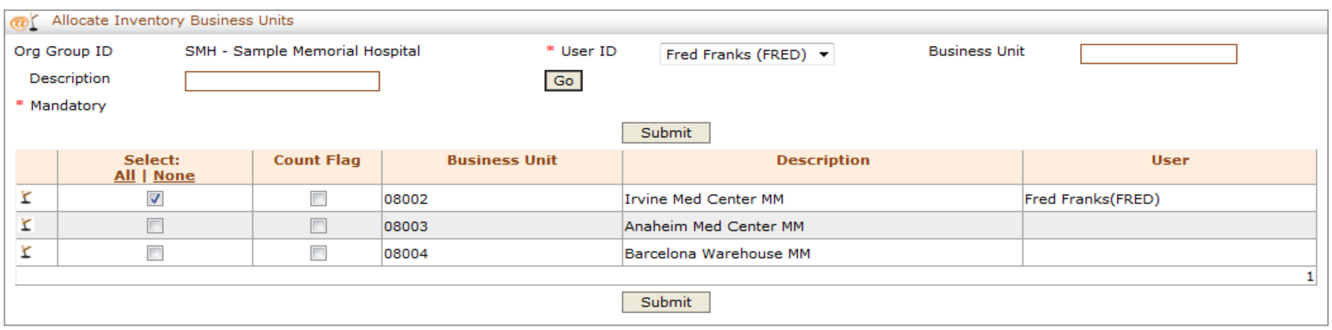

Figure 9

If there are multiple pages of Business Units to display there will be multiple pages (1 2 3 4 5 …) in the bottom right hand portion of the screen. This denotes that there are more pages of business units available for allocation but don't appear on this screen. To see the other pages click the respective page number.

Use the ☐ or **Select: All | None** to select Business Units to allocate. If the Business unit is going to be a special 'count' business unit discussed below and further in the Stock Issue HHT Guide.

Select the Count Flag (☑)for that Business Unit.

Count Flag - The Stock Issue application has been modified to enable customers to perform daily counts that will compare the count entered with the system QOH and create an issue transaction in PeopleSoft (PS) where the Physical QOH < the System QOH or a credit in PS if the counted quantity is greater than the system quantity.

As this functionality is similar to Issue and Return, it must be noted that the functionality was created for Inventory Business Units that do not require such close tracking of item usage by department – such as an IBU that is strictly used by the Operating Room so anything used from that IBU will always be charged to the Operating Room.

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Once the choices are made ***click*** Submit the confirmation message appears as shown in **Figure 10**

Figure 10

Allocate Distribution Type

This menu option is used to allocate the distribution type a HHT user can access. Once selected the **Figure 11** choices appear.

Figure 11

User ID – This field is used to select the **User ID** you're allocating destination locations to.

Distrib Type – This field can be used as a filter to narrow down the distribution type if known, that you want to allocate to the selected user.

Display – This field can use to filter **ALL, Allocated** or **Unallocated** locations that will be displayed.

Records Per Page – This affects the number of records displayed per page. Choices are within 10-90 or ALL.

Click the Go button **Figure 12**

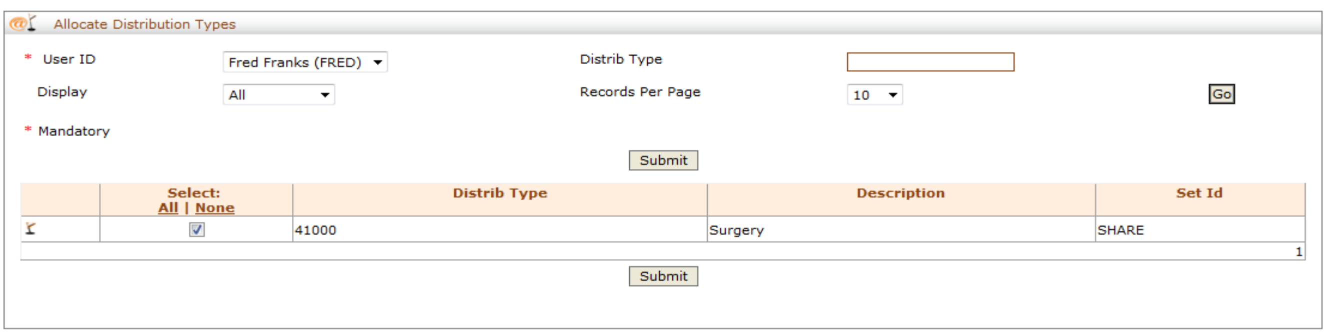

Figure 12

Check the desired **Distribution Types** for this user and then ***click*** on Submit. A confirmation message will appear afterward.

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Allocate Destination Locations

This menu option is used to allocate the destination locations a HHT user is able to deliver items to. Once selected the **Figure 13** appears.

Note: The Business Unit must be allocated to the web user in order for the web user to allocate locations to the HHT user.

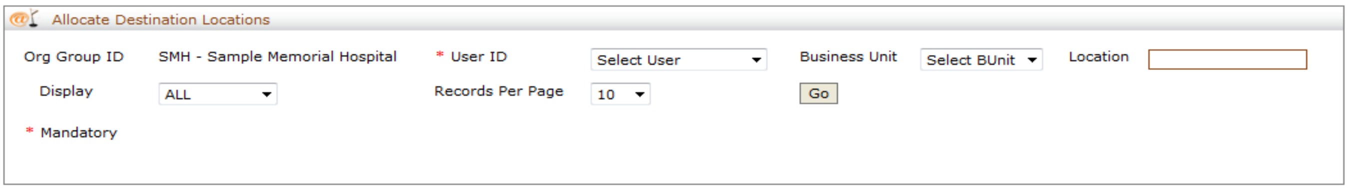


Figure 13

User ID – This field is used to select the **User ID** you're allocating destination locations to.

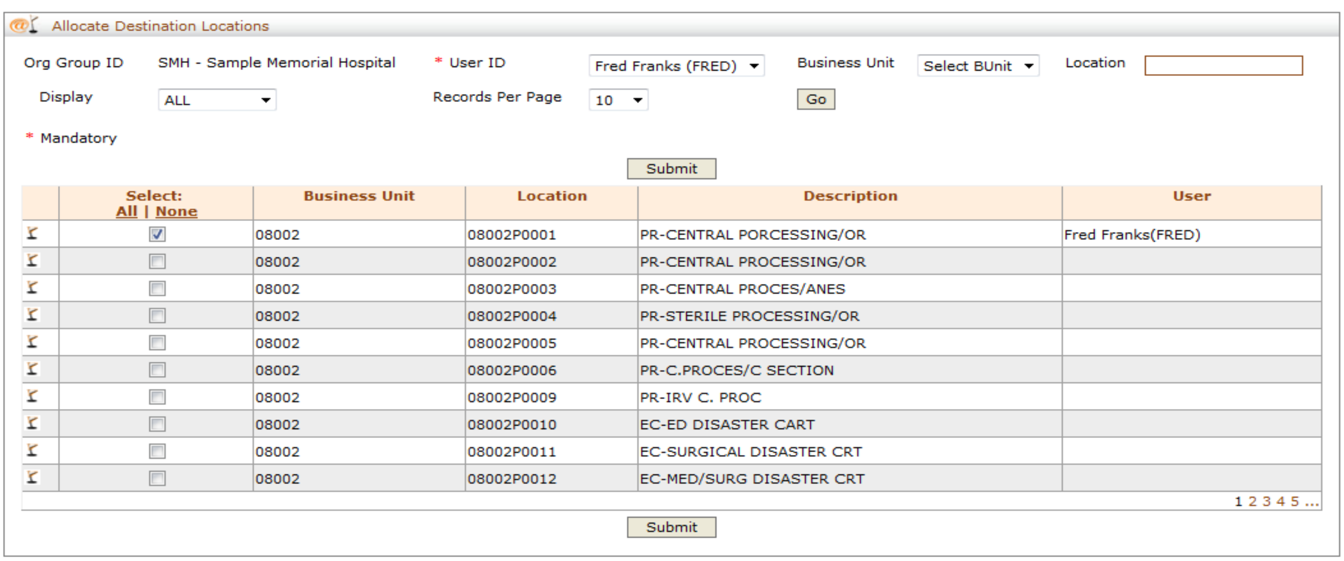
Business Unit – This field can be used as a filter to narrow down the destination location by Business Unit, by selecting available business unit from the dropdown.

Location – This field can be used as a filter to narrow down the destination location if known, that you want to allocate to the selected user.

Display – This field can use to filter **ALL, Allocated** or **Unallocated** locations that will be displayed.

Records Per Page – This affects the number of records displayed per page. Choices are within 10-90 or ALL.

Click the Go button **Figure 14**



	Select: All | None	Business Unit	Location	Description	User
	☑	08002	08002P0001	PR-CENTRAL PORCESSING/OR	Fred Franks(FRED)
	☐	08002	08002P0002	PR-CENTRAL PROCESSING/OR	
	☐	08002	08002P0003	PR-CENTRAL PROCES/ANES	
	☐	08002	08002P0004	PR-STERILE PROCESSING/OR	
	☐	08002	08002P0005	PR-CENTRAL PROCESSING/OR	
	☐	08002	08002P0006	PR-C.PROCES/C SECTION	
	☐	08002	08002P0009	PR-IRV C. PROC	
	☐	08002	08002P0010	EC-ED DISASTER CART	
	☐	08002	08002P0011	EC-SURGICAL DISASTER CRT	
	☐	08002	08002P0012	EC-MED/SURG DISASTER CRT	

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Figure 14

Notice in the lower right hand corner the 1 2 3 4 5 … this appears to allow the various pages to be selected. Since we had earlier selected 10 records per page and not ALL these page change options will appear.
Check off the desired **Destination Locations** for this user and then ***click*** on Submit. A confirmation message will appear afterward.

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 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 **Figure 15** window will appear.

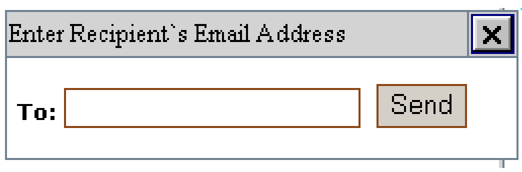

Figure 15

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 by the @Par Administrator 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 **Figure 16** screen appears.

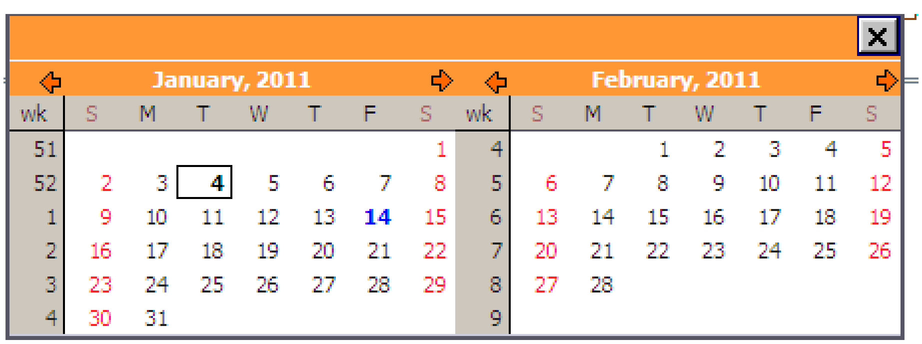

Figure 16

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

- This is a symbol on the top of most columns on the reports. If you see this on a report, this allows you to sort the report on the column. Most reports come with sortable columns by clicking the column header or name.

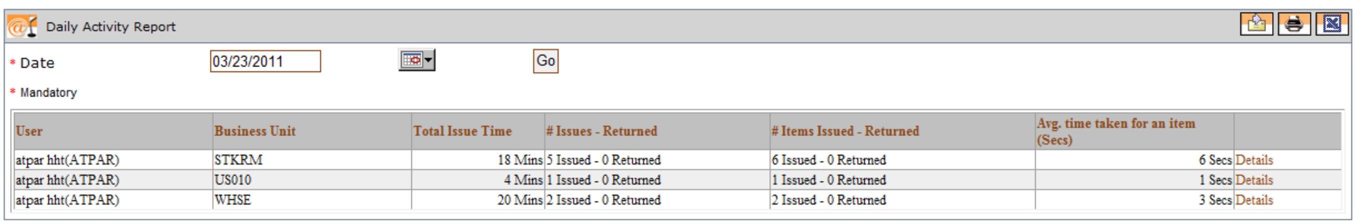
Daily Activity Report

This menu section is used to view the overall daily activities and is designed to capture summary information for a single date. When first viewed, the report will default to the current date, and you will see the following **Figure 17** screen.

User	Business Unit	Total Issue Time	# Issues - Returned	# Items Issued - Returned	Avg. time taken for an item (Secs)	
atpar hht(ATPAR)	WHSE	11 Mins	0 Issued - 3 Returned	0 Issued - 3 Returned	3 Secs	Details

Figure 17

To view Daily Activity for another date, enter the Date or select from the calendar , then **click** on to proceed. The view will expand as shown in **Figure 18**.



User	Business Unit	Total Issue Time	# Issues - Returned	# Items Issued - Returned	Avg. time taken for an item (Secs)	
atpar hht(ATPAR)	STKRM	18 Mins	5 Issued - 0 Returned	6 Issued - 0 Returned	6 Secs	Details
atpar hht(ATPAR)	US010	4 Mins	1 Issued - 0 Returned	1 Issued - 0 Returned	1 Secs	Details
atpar hht(ATPAR)	WHSE	20 Mins	2 Issued - 0 Returned	2 Issued - 0 Returned	3 Secs	Details

Figure 18

This report captures the following information.

User – The User Id that performed the item issue.

Business Unit – Inventory Business Unit product was issued from.

Total Issue Time – The total time the user took to issue the item.

 # Issues - Returned – The total number of separate issues and returns the user performed on this date.

 # Items Issued – Returned – The total number of separate items the user issued or returned on this date.

Avg. time taken for an item (secs) – Average time in seconds the user took to count the items.

User can navigate to the Daily User Activity report for a specific user by ***clicking*** on the Details link seen at the far right end of the line for a given user provides more detail and is discussed next.

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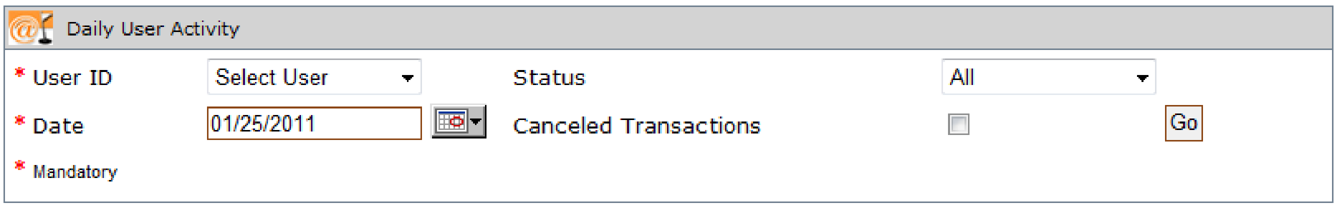
Daily User Activity Report

Accessing this report from the menu will provide you with the following **Figure 19** screen. This screen allows you to select a user and view their daily activity.


Daily User Activity

* User ID Select User

Status All

* Date 01/25/2011

Canceled Transactions

Go

* Mandatory

Figure 19

Select a **User ID** from the drop down window.

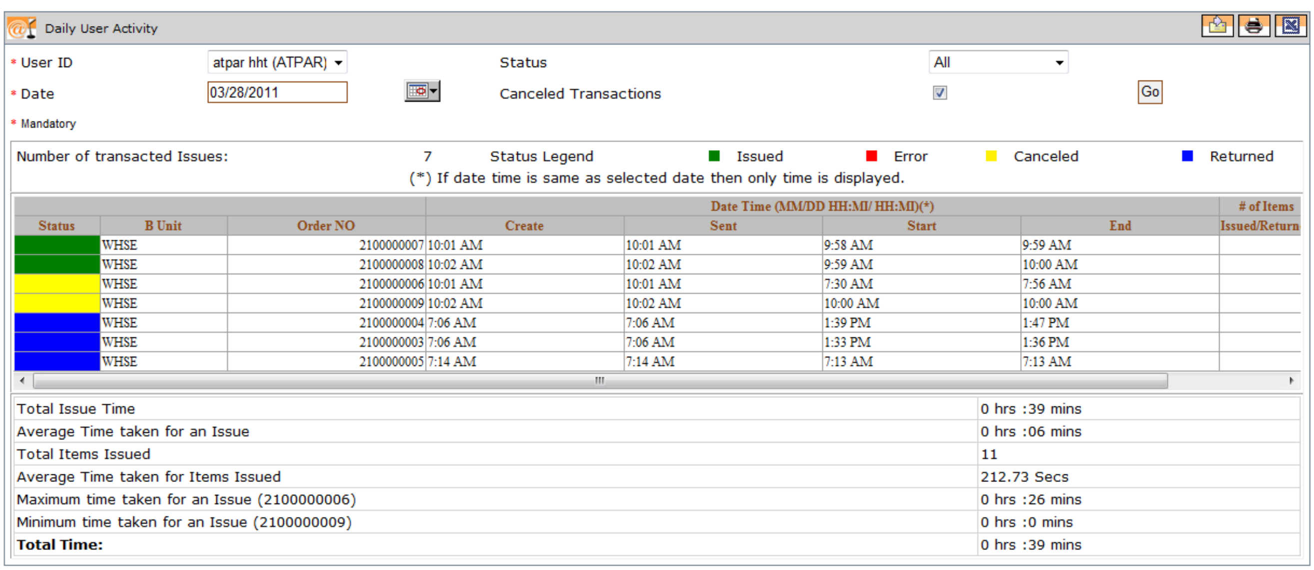
Select a **Status** or leave as ALL. Selectable statuses are either ALL, Issued, Error or Returned.

Select a **Date**.

Checking the **Canceled Transactions** check box will cause the canceled transactions to display on the report. Leave this box unchecked if you want to return all transactions except canceled.

Then **click** on Go to proceed, the view will expand as shown in **Figure 20**.

Figure 21 and **22** show an example of a user's daily activity report including the **Cancelled Transactions.**


Daily User Activity

* User ID atpar hht (ATPAR)

Status All

* Date 03/28/2011

Canceled Transactions

Go

* Mandatory

Number of transacted Issues: 7 Status Legend Issued Error Canceled Returned

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

			Date Time (MM/DD HH:MI/ HH:MI)(*)				# of Items
Status	B Unit	Order NO	Create	Sent	Start	End	Issued/Return
	WHSE	2100000007	10:01 AM	10:01 AM	9:58 AM	9:59 AM	
	WHSE	2100000008	10:02 AM	10:02 AM	9:59 AM	10:00 AM	
	WHSE	2100000006	10:01 AM	10:01 AM	7:30 AM	7:56 AM	
	WHSE	2100000009	10:02 AM	10:02 AM	10:00 AM	10:00 AM	
	WHSE	2100000004	7:06 AM	7:06 AM	1:39 PM	1:47 PM	
	WHSE	2100000003	7:06 AM	7:06 AM	1:33 PM	1:36 PM	
	WHSE	2100000005	7:14 AM	7:14 AM	7:13 AM	7:13 AM	

Total Issue Time	0 hrs :39 mins
Average Time taken for an Issue	0 hrs :06 mins
Total Items Issued	11
Average Time taken for Items Issued	212.73 Secs
Maximum time taken for an Issue (2100000006)	0 hrs :26 mins
Minimum time taken for an Issue (2100000009)	0 hrs :0 mins
Total Time:	0 hrs :39 mins

Figure 20

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Using the Scroll Bar at the bottom of the report grid will display more columns, as displayed in **Figure 21.**

Daily User Activity

* User ID atpar hht (ATPAR) | Status All
* Date 03/28/2011 | Canceled Transactions [checked] Go
* Mandatory

Number of transacted Issues: 7 Status Legend: Issued, Error, Canceled, Returned
(*) If date time is same as selected date then only time is displayed.

B Unit	Order NO	Date Time (MM/DD HH:MI/ HH:MI)(*) Create	Sent	Start	End	# of Items Issued/Returned	Device ID
	2100000007	10:01 AM	10:01 AM	9:58 AM	9:59 AM	3	14758102AC4...
	2100000008	10:02 AM	10:02 AM	9:59 AM	10:00 AM	3	14758102AC4...
	2100000006	10:01 AM	10:01 AM	7:30 AM	7:56 AM	1	14758102AC4...
	2100000009	10:02 AM	10:02 AM	10:00 AM	10:00 AM	1	14758102AC4...
	2100000004	7:06 AM	7:06 AM	1:39 PM	1:47 PM	1	14758102AC4...
	2100000003	7:06 AM	7:06 AM	1:33 PM	1:36 PM	1	14758102AC4...
	2100000005	7:14 AM	7:14 AM	7:13 AM	7:13 AM	1	14758102AC4...

Total Issue Time	0 hrs :39 mins
Average Time taken for an Issue	0 hrs :06 mins
Total Items Issued	11
Average Time taken for Items Issued	212.73 Secs
Maximum time taken for an Issue (2100000006)	0 hrs :26 mins
Minimum time taken for an Issue (2100000009)	0 hrs :0 mins
Total Time:	0 hrs :39 mins

Figure 21

Leaving the **Canceled Transactions** check box unchecked and ***clicking*** on the Go button will provide you the following view shown in **Figure 22** in which the cancelled transactions have been filtered.

Daily User Activity

* User ID atpar hht (ATPAR) | Status All
* Date 03/28/2011 | Canceled Transactions [unchecked] Go
* Mandatory

Number of transacted Issues: 5 Status Legend: Issued, Error, Canceled, Returned
(*) If date time is same as selected date then only time is displayed.

Status	B Unit	Order NO	Date Time (MM/DD HH:MI/ HH:MI)(*) Create	Sent	Start	End	# of Items Issued/Return
	WHSE	2100000007	10:01 AM	10:01 AM	9:58 AM	9:59 AM	
	WHSE	2100000008	10:02 AM	10:02 AM	9:59 AM	10:00 AM	
	WHSE	2100000004	7:06 AM	7:06 AM	1:39 PM	1:47 PM	
	WHSE	2100000003	7:06 AM	7:06 AM	1:33 PM	1:36 PM	
	WHSE	2100000005	7:14 AM	7:14 AM	7:13 AM	7:13 AM	

Total Issue Time	0 hrs :13 mins
Average Time taken for an Issue	0 hrs :03 mins
Total Items Issued	9
Average Time taken for Items Issued	86.67 Secs
Maximum time taken for an Issue (2100000004)	0 hrs :8 mins
Minimum time taken for an Issue (2100000005)	0 hrs :0 mins
Total Time:	0 hrs :13 mins

Figure 22

This report will show you the detailed information from the summary **Daily Activity Report**.

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Issue Report

The issue report is used by Supervisors and Web users to review Issues and signatures. This report will capture all issues created from the @Par Stock Issue HHT.

To run the report select from the following **Figure 23** screen.

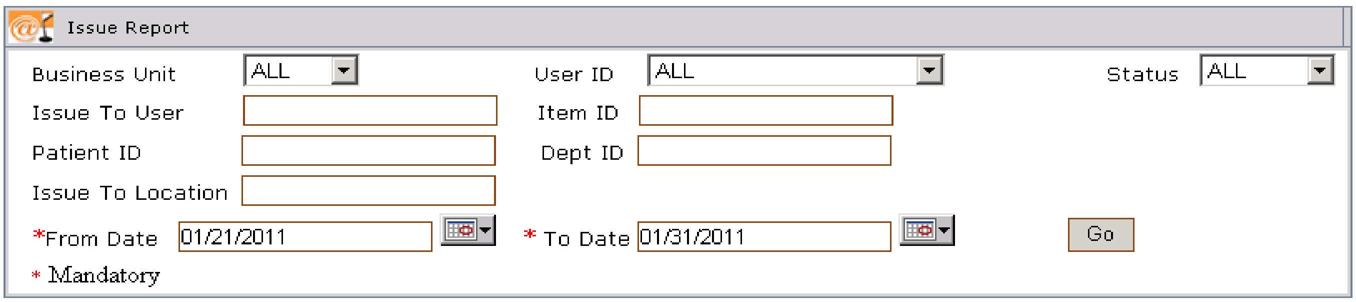

Figure 23

The search field options shown in **Figure 23** are:

Business Unit **User ID** **Status**
Issue to User **Item ID**
Patient ID **Dept ID**
Issue to Location
From Date and To Dates (* this is the minimum, mandatory field search option)

Once the Manager or Server user has selected the parameters, the report as shown in **Figure 24** will display.

Information available to the Manager and Server Users are;

Issue Date-User,
Issue to Location,
Issue to User,
Business Unit,
Dept. ID item was issued to,
Item ID,
Qty-UOM (Issue item quantity and Unit of Measure),
Patient ID number,
Adjustment Type if transaction is an adjustment, Increase or Decrease – using the Count functionality - will display here.
Status of issue
Signature of individual receiving the item(s) – if required

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Issue Report

Business Unit: ALL | User ID: atpar hht (ATPAR) | Status: ALL
Issue To User: | Item ID:
Patient ID: | Dept ID:
Issue To Location: C

* From Date 03/28/2011 * To Date 03/28/2011 Go

* Mandatory

Issue Report for ATPAR between 03/28/2011 and 03/28/2011

Issue Date-User	Issue To Location	Issue To User	Business Unit	Dept ID	Item ID	Qty - UOM	Patient ID	Adjustment Type	Status	Signature
3/28/2011 10:36:00 AM - atpar hht (ATPAR)	CCUMED		STKRM		000000000000010002	52 - EA		Increase	Issued	
3/28/2011 10:36:00 AM - atpar hht (ATPAR)	CCUMED		STKRM		0030235	4 - PR		Increase	Issued	
3/28/2011 10:36:00 AM - atpar hht (ATPAR)	CCUMED		STKRM		0030243	20 - PR		Decrease	Issued	
3/28/2011 10:01:00 AM - atpar hht (ATPAR)	CATHLAB		WHSE		0030286	1 - EA			Cancelled	
3/28/2011 10:00:00 AM - atpar hht (ATPAR)	CTICU		WHSE		0030286	1 - EA			Issued	
3/28/2011 10:00:00 AM - atpar hht (ATPAR)	CTICU		WHSE		0030326	1 - EA			Issued	
3/28/2011 7:14:00 AM - atpar hht (ATPAR)	CCU		WHSE		0030290	1 - EA			Returned	

1 2

Figure 24

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