@Par Server Users Guide
Par Management
.NET Version 1.0

This document is intended for Administrators and Server Users.

May 15, 2007

Change Document

Revision	Date	Description of Change
1	5/15/2007	.Net version release

Table of Contents:

Par Management Application

Introduction to Par Management

Par Management has been developed to allow organizations the ability to manage all aspects of Cart Par Management:

1. Creating Companies
2. Creating Locations
3. Creating and managing Vendors
4. Creating and managing Items
5. Creating and managing Carts

Par Management will enable organizations with or without an Enterprise (ERP) System the ability to manage their Cart locations and replenishments.

Administrator Requirements

The **@Par Server** is loaded with a default administrator login. The UserID is admin and the Password is admin. Using admin as the UserID and Password, ***Click*** on the **Login** button.

You should now be at the **@Par Server** main screen: ***Figure 1***

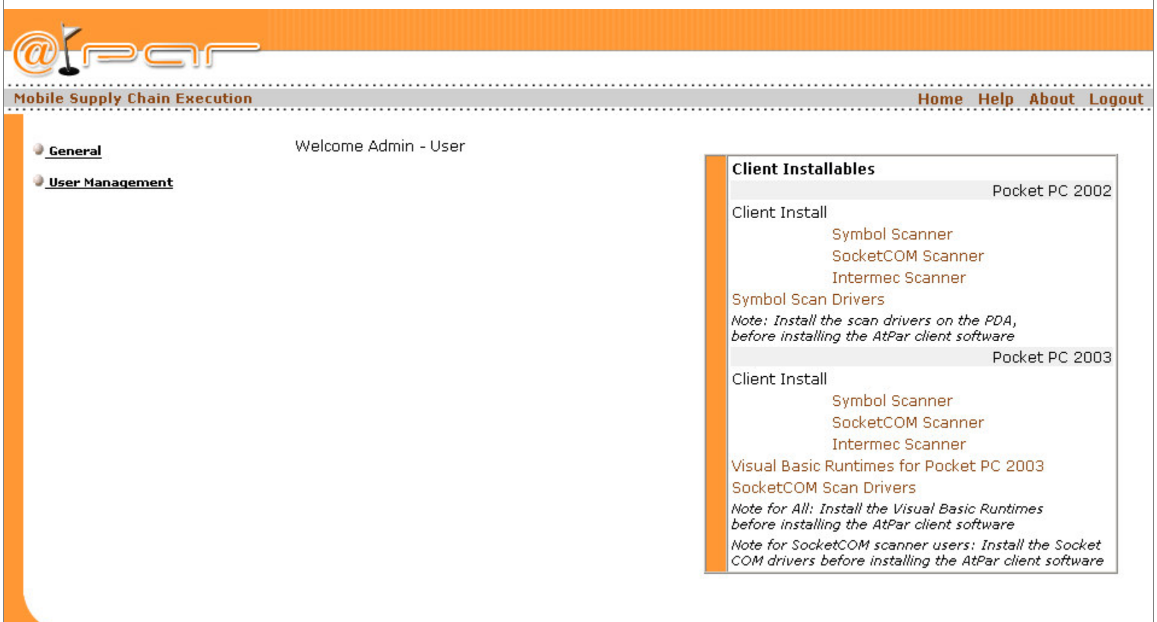


Figure 1

NOTE: ALL @Par Modules will have the *General* and *User Management* menus.

The **General** and **User Management** functions should now appear and can only be used by the **@Par Administrator**.

General

You will see three options under the **General** function; **My Profile, Error Report and Change Password.** See the screen shot below: ***Figure 2***

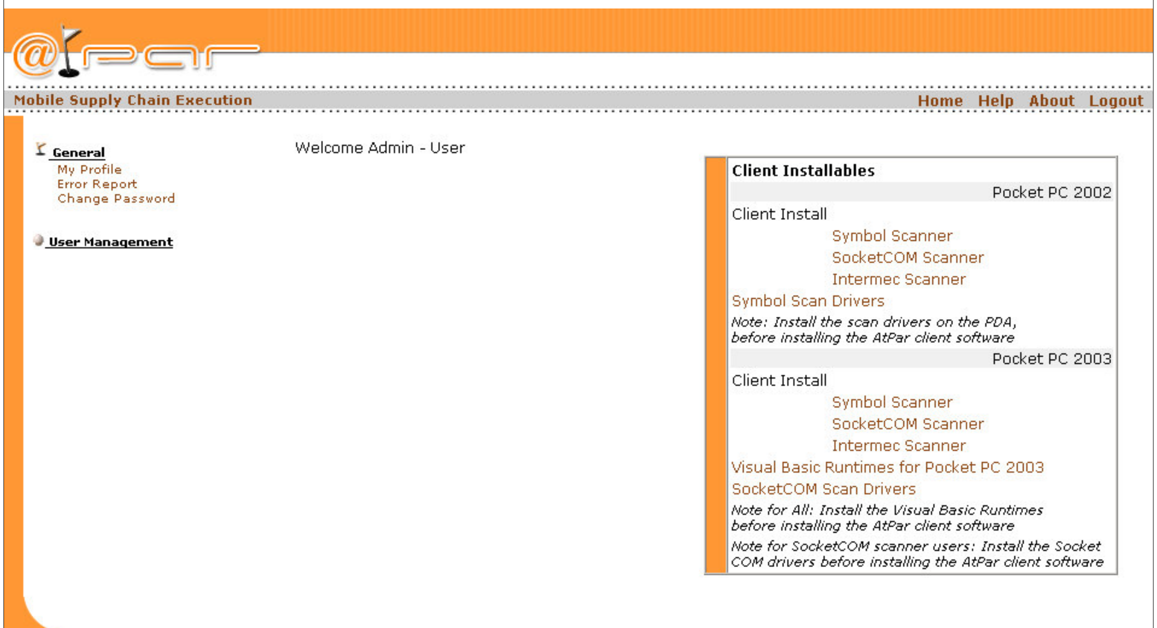
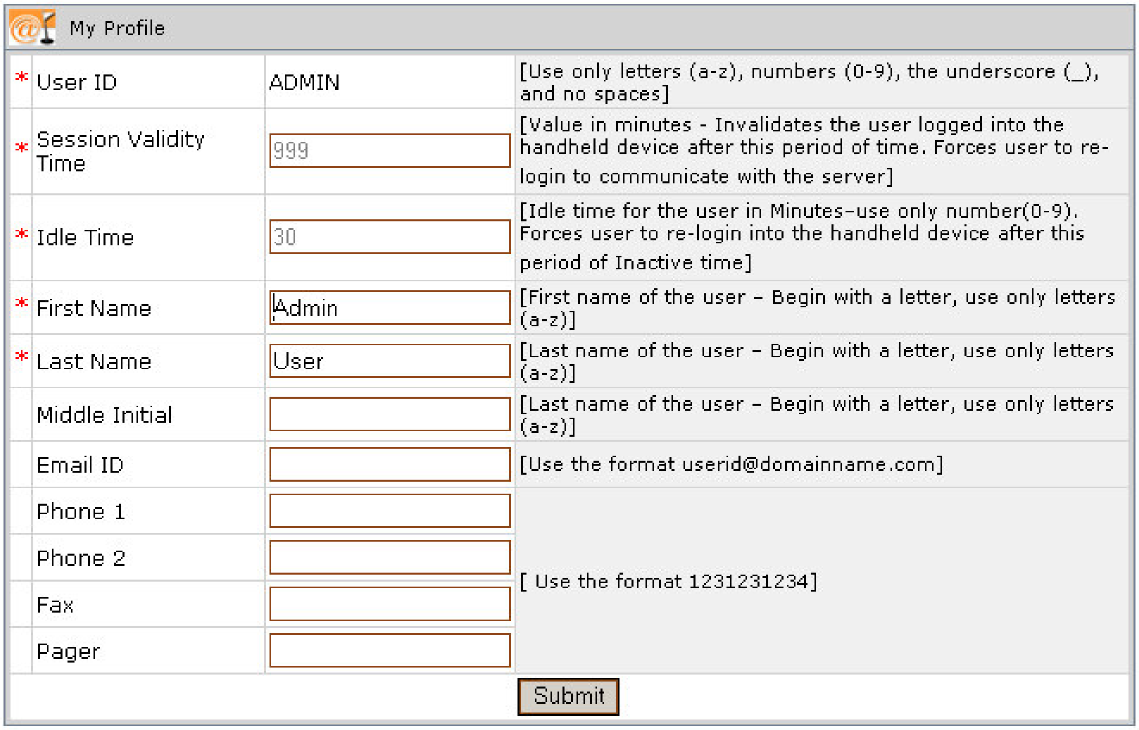


Figure 2

My Profile is used to modify the Admin user information: ***Figure 3***



My Profile

* User ID	ADMIN	[Use only letters (a-z), numbers (0-9), the underscore (_), and no spaces]
* 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	30	[Idle time for the user in Minutes-use only number(0-9). Forces user to re-login into the handheld device after this period of Inactive time]
* First Name	Admin	[First name of the user - Begin with a letter, use only letters (a-z)]
* Last Name	User	[Last name of the user - Begin with a letter, use only letters (a-z)]
Middle Initial		[Last name of the user - Begin with a letter, use only letters (a-z)]
Email ID		[Use the format userid@domainname.com]
Phone 1		[Use the format 1231231234]
Phone 2		
Fax		
Pager		

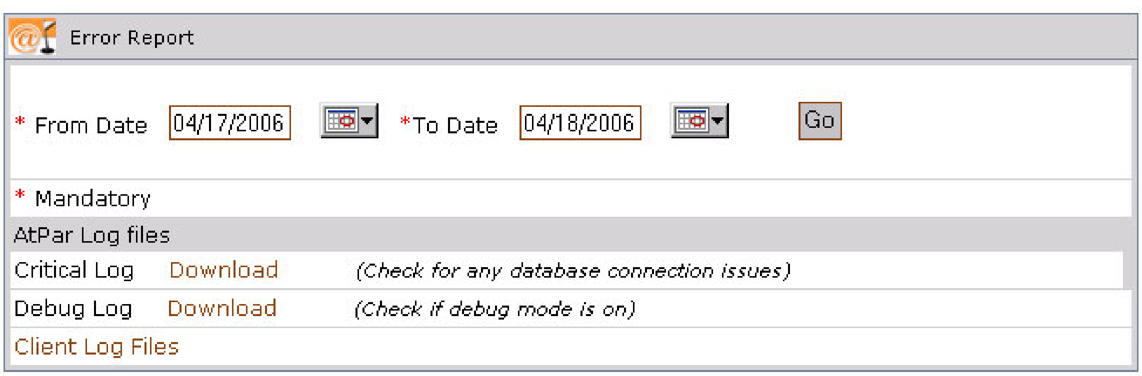
Submit

Figure 3

NOTE: Any options or fields denoted with an asterisk (*) are required to be completed. Also, the Admin Userid may not be changed or edited.

Details of each field are further discussed in the User Management section found later in this document.

The **Error Report** function screen is shown next: ***Figure 4***



Error Report

* From Date 04/17/2006 *To Date 04/18/2006 Go

* Mandatory

AtPar Log files

Critical Log	Download	*(Check for any database connection issues)*
Debug Log	Download	*(Check if debug mode is on)*

Client Log Files

Figure 4

The **Error Report** allows the Administrator and Functional Managers to run error logs with a From and To date. It will also allow you to download these so you can print them out.

Clicking on the **GO** button will give the Administrator the next screen: ***Figure 5***

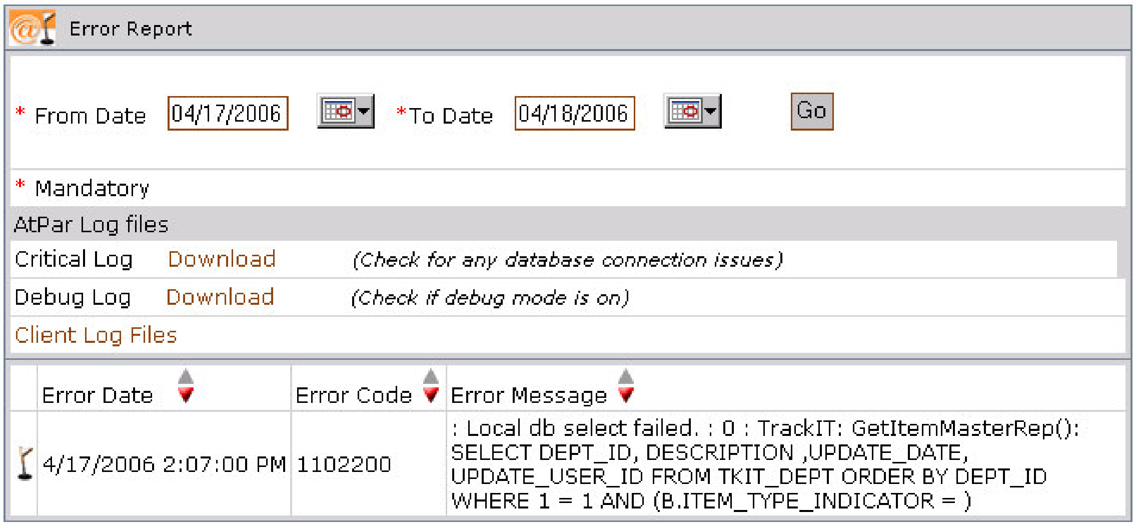


Figure 5

It provides the Error Date and Time, Error Code, and Error Message.

There are times that **@Par Support** may need a copy of the error logs. This can be done easily by the user.

Click on the "Download" next to the Log file the Support department asks for, and this will create a file that you can then email to Support. This log will only be created when the **Debug** option in **User Management**, **Configuration Manager** is checked. **Critical Logs** will also only be created when a Critical Error occurs.

New in version 2.6.2 and above versions, is the ability to view and download files from the client hand held devices. To access this option, ***Click*** on the **Client Log Files** option: ***Figure 6***

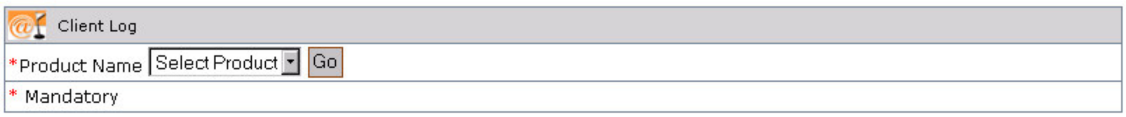


Figure 6

The administrator can now select the product and ***Click*** the **Go** button. This will provide the administrator with the hand held log file and the ability to email to **@Par** support.

The last part of the **General Section** is **Change Password**: ***Figure 7***

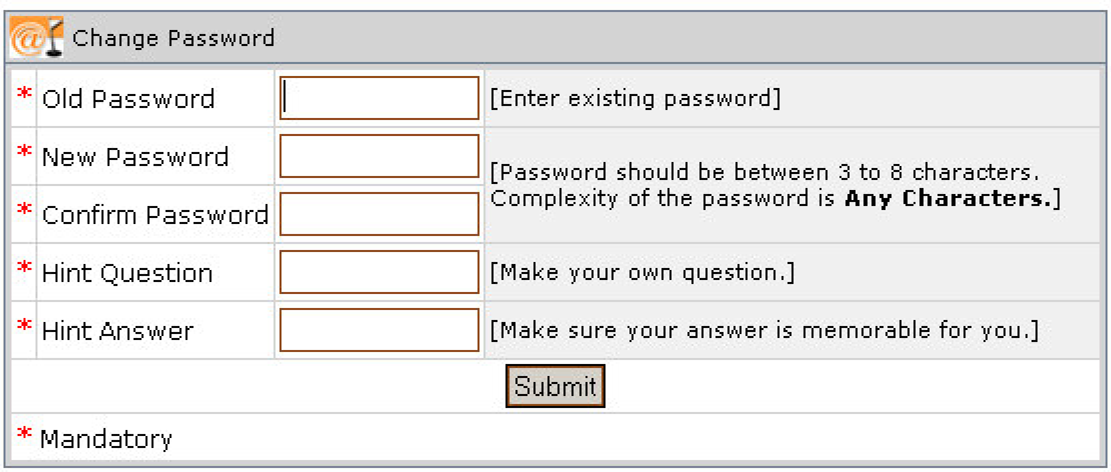


Figure 7

First type in existing password in the **Old Password** field.

Enter new password in the **New Password** field.

In the **Confirm Password** field, type in the same thing you did in the **New Password** field.

Click the **Submit** button and you have changed the password.

User Management

Clicking on **User Management** reveals there are 10 items that the Administrator or Functional Manager with Administrator rights has access to: ***Figure 8***

Create User	*Manage User*
Define Product Access	*Manage Tokens*
Define Groups	*Configuration Manager*
Security Configuration	*Product Parameters*
Screen Display Setup	*User Status Report*

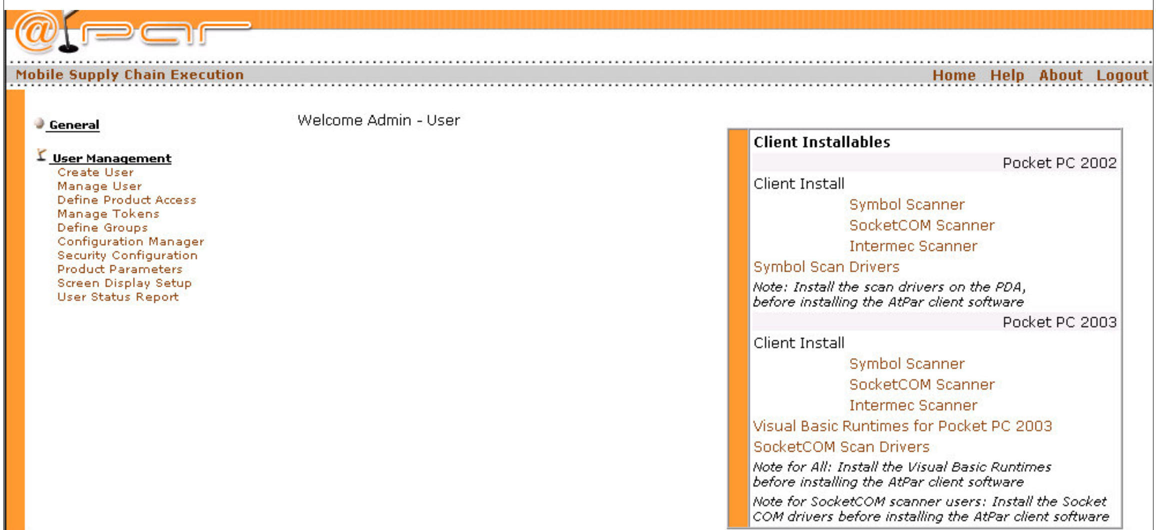


Figure 8

Create User and Manage User – The administrator uses these options to create and manage/edit **ALL @Par** users.

An example of the screen and definitions of the options can be found on the following page: ***Figure 9***

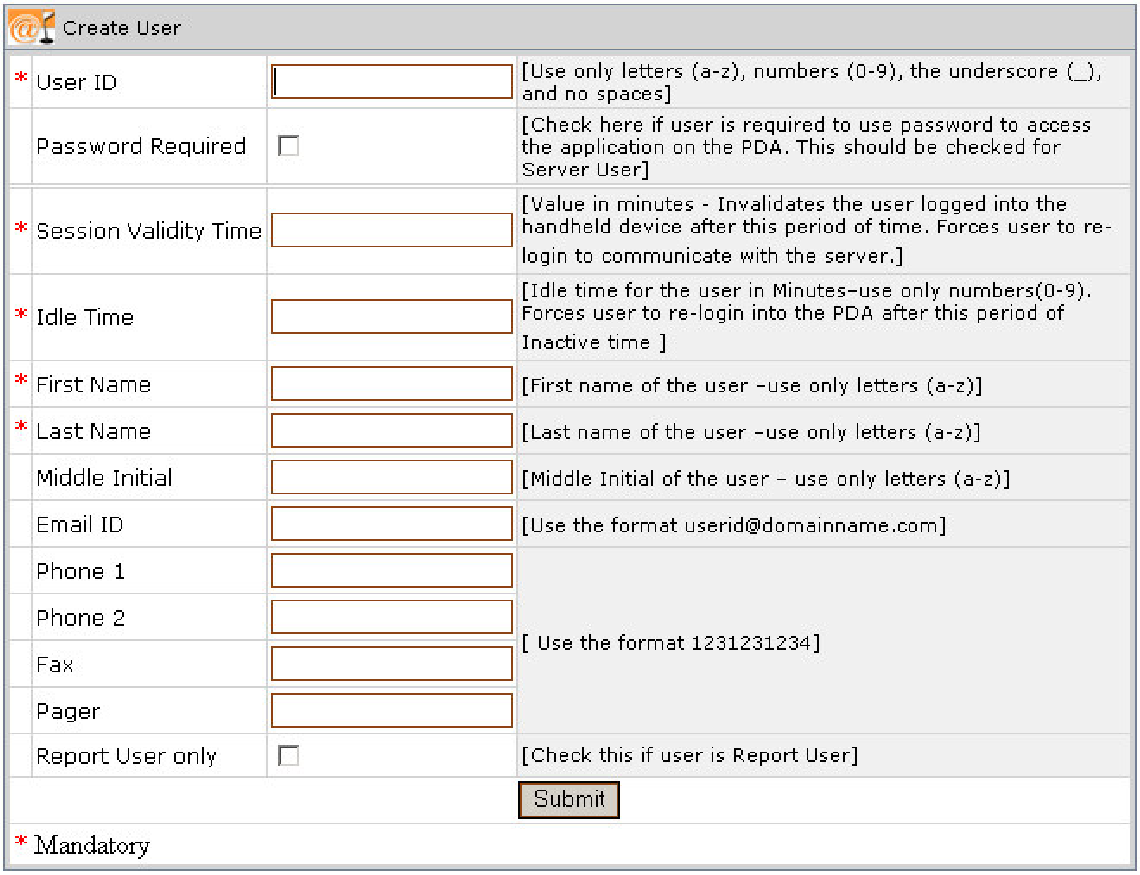


Figure 9

NOTE: Required fields are noted with an asterisk (*).

User ID – Administrator assigns a unique UserID using letters, numbers, or underscore in any combination. **No spaces**.

Password required – This is an optional check box. If the Administrator checks the check box, two additional options will appear ---- Password and Password Confirmation.

NOTE: Server Users MUST have a password assigned to them.

Session Validity Time -This is used to set the length of time, entered in minutes, that a user can access the **@Par** programs. If a user is logged in longer than this time, the system will require them to login again. We recommend setting this time to the total minutes of a user's shift. For example if this user works 9:00 a.m. To 5:00 p.m., set the time to 480.

Idle Time – This is the time set in minutes that the PDA allows the user to have inactivity. If this is set to 30, and there is 31 minutes of idle time, the PDA will require the user to login again.

First Name – Enter the User's first name, using letters only.

Last Name – Enter the User's last name, using letters only.

Middle Initial – Enter the User's middle initial using letters only.

Email ID – Enter the User's email address using the format; for example, userid@domainname.com.

Phone 1 – Use the 1234567890 format.

Phone 2 - Use the 1234567890 format.

Fax - Use the 1234567890 format.

Pager - Use the 1234567890 format.

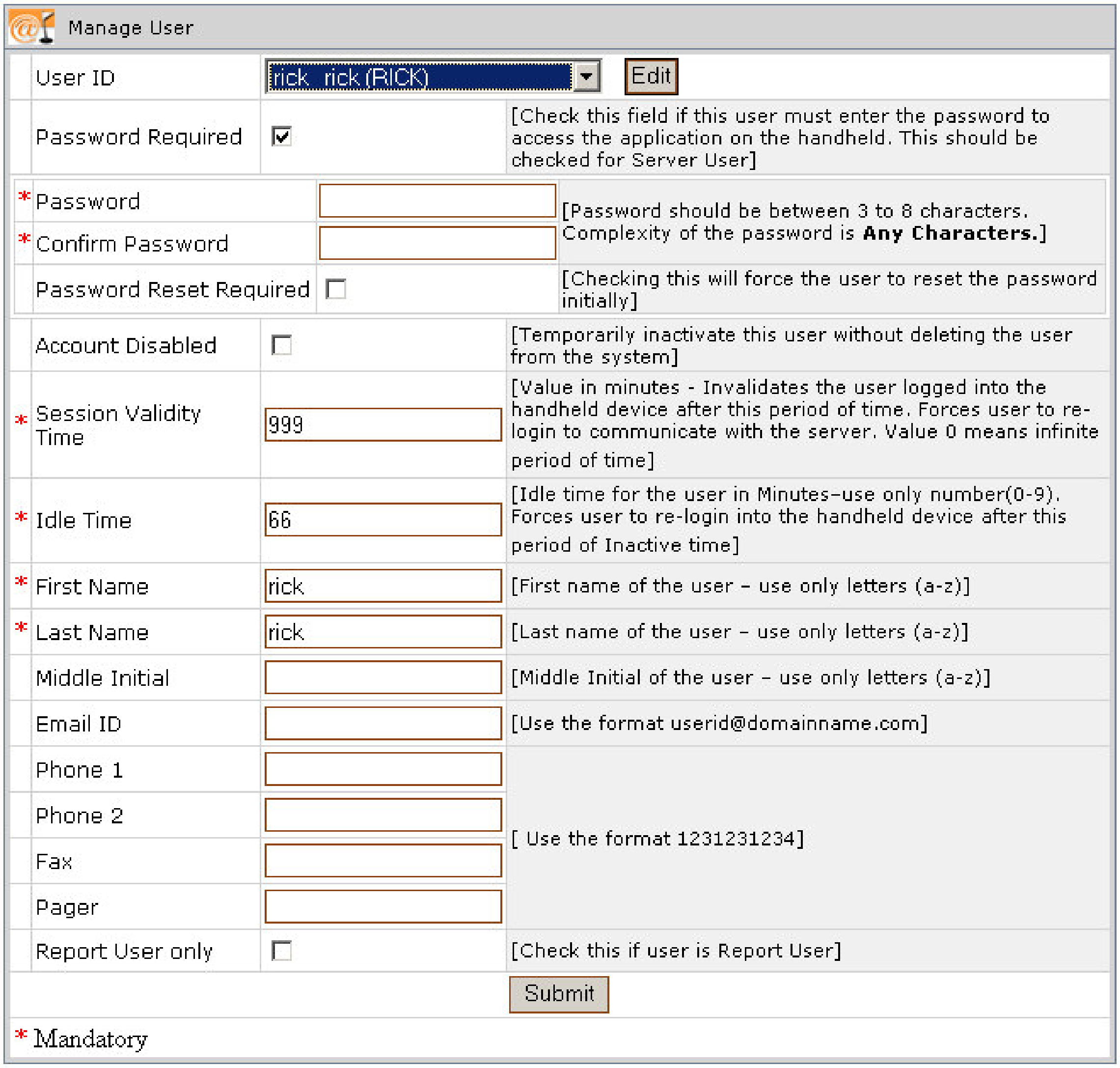
Report User only – Checking this option will allow user access to view all assigned users in their group, but **NOT** be reflected in the User Proxy list on the hand held device.**

**The user needs to be set with Client Role for Product and assigned a Password.

After entering all information for a User, ***Click*** on the **Submit** button.

You will need to repeat this process for all users that need access to the **@Par** programs.

Clicking on the **Manage User** option will give you the following screen. As you can tell, this screen is very similar to **Create User**. This is where the Administrator may modify User options: ***Figure 10***



Manage User

User ID	rick rick (RICK) [Edit]	
Password Required	☑	[Check this field if this user must enter the password to access the application on the handheld. This should be checked for Server User]
* Password		[Password should be between 3 to 8 characters. Complexity of the password is **Any Characters.**]
* Confirm Password		
Password Reset Required	☐	[Checking this will force the user to reset the password initially]
Account Disabled	☐	[Temporarily inactivate this user without deleting the user from the system]
* 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. Value 0 means infinite period of time]
* Idle Time	66	[Idle time for the user in Minutes-use only number(0-9). Forces user to re-login into the handheld device after this period of Inactive time]
* First Name	rick	[First name of the user - use only letters (a-z)]
* Last Name	rick	[Last name of the user - use only letters (a-z)]
Middle Initial		[Middle Initial of the user - use only letters (a-z)]
Email ID		[Use the format userid@domainname.com]
Phone 1		[Use the format 1231231234]
Phone 2		
Fax		
Pager		
Report User only	☐	[Check this if user is Report User]
	Submit	

* Mandatory

Figure 10

In the Manage User screen, there are up to **two** *additional options*;

Password Reset Required – Check this option to force this user to reset their password when the user initially logs in on the hand held device.

Account Disabled – Check this option to disable this user's account. In any **@Par product**, we do not allow the deletion of a user because of historical reporting data.

- If a user leaves, you should unassign them from **Product Access**, take them off any groups in **Define Groups**, and check this option.

The next item you will see is the **Define Product Access**. This works in conjunction with the **Define Groups** function.

Define Product Access

This section is where Administrators will set up the different products a user may access. It is also the section that you need to define the Functional Manager as a Server User for all products. The **Define Product Access** screen: ***Figure 11***

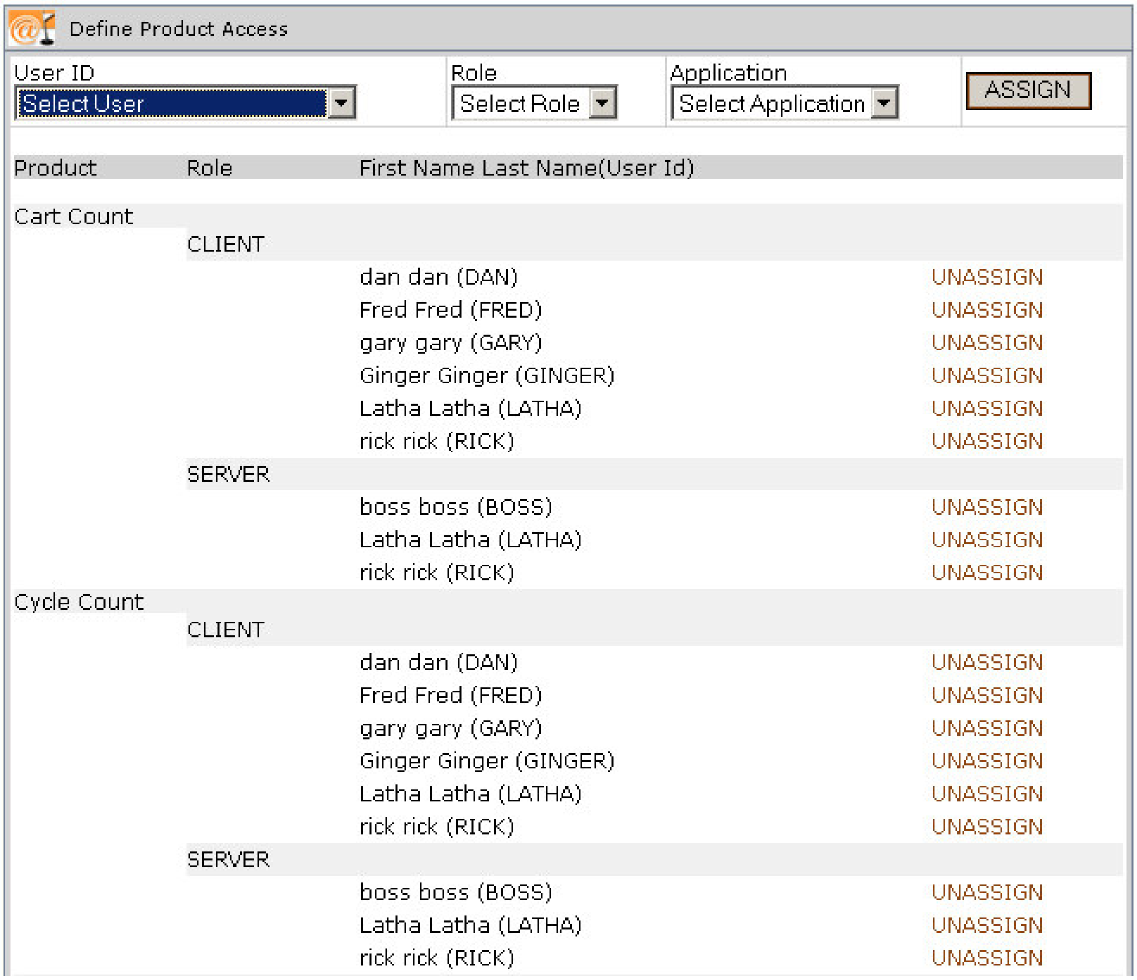


Figure 11

UserID – Click on the drop down and select the Functional Manager user.

Role – You want the Functional Manager to have the Server Role, so select this option here. If you were setting up a User to utilize a hand held device, you would select Client Role.

Application – Click on the drop down and select the Application (CartCount, CycleCount, etc.) you want the user to have access to.

If you are satisfied with the three items you have chosen, ***Click*** the **ASSIGN** button. In this case, we are going to assign the Functional Manager server user rights for CartCount, CycleCount, Receiving, and Deliver.

Each time you select Functional Manager User, Role of Server, and the respective application, you need to ***Click*** on the **ASSIGN** button. You will also receive the message “User has been successfully assigned at the top of the screen.

Your screen should refresh after each **Assign** button, and will look like this now: ***Figure 12***

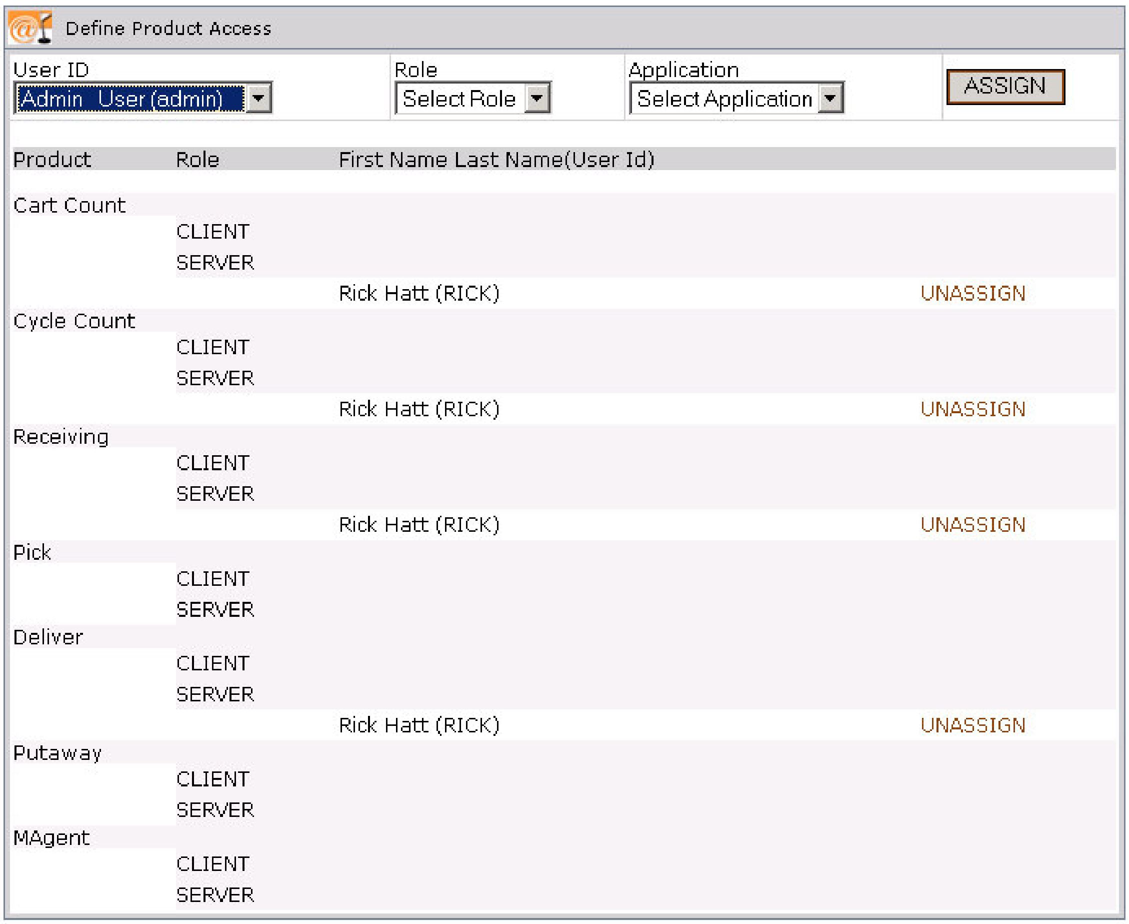


Figure 12

You will now add a **Client** user for all four modules.

Add user from the UserID drop down, Client as the Role, and then each respective Application. Remember to ***Click*** the **Assign** button after each Application.

You should see the screen below: ***Figure 13***

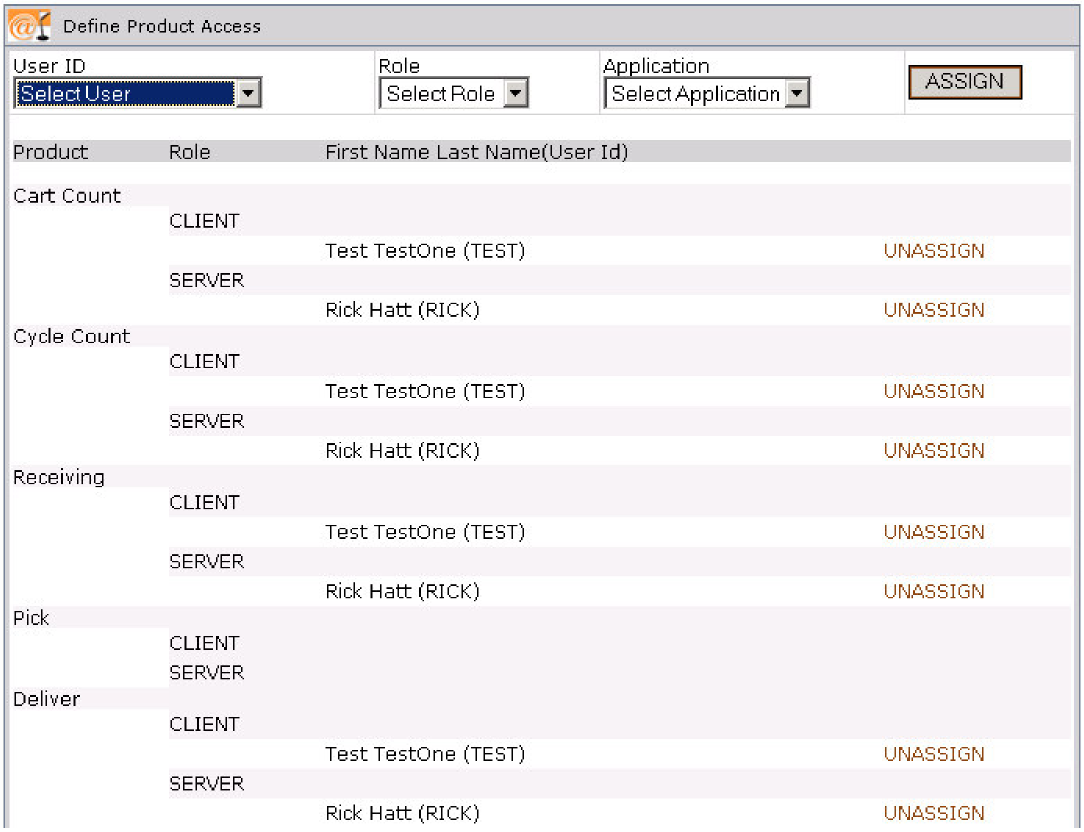


Figure 13

You have successfully **Defined Product Access** in **@Par**. One important note before you learn the second phase of enabling User access is the **UNASSIGN** button on the **Define Product Access** screen.

If at any time you need to remove a user from an application, simply find the Application, Client, and UserID, and ***Click*** the **Unassign** button.

Now, you need to know how to **Define Groups** for each user. This section begins on the following page.

Define Groups

Groups in **@Par** are used to assign users to Functional Managers. For example, if there are multiple departments or hospitals, you would set up users under their Functional Manager.

You have defined the Client Users that will access your organization's @Par applications. However, they still will not have the applications available to them until you complete the Define Groups section.

Select **Define Groups** and you will see the following screen: ***Figure 14***

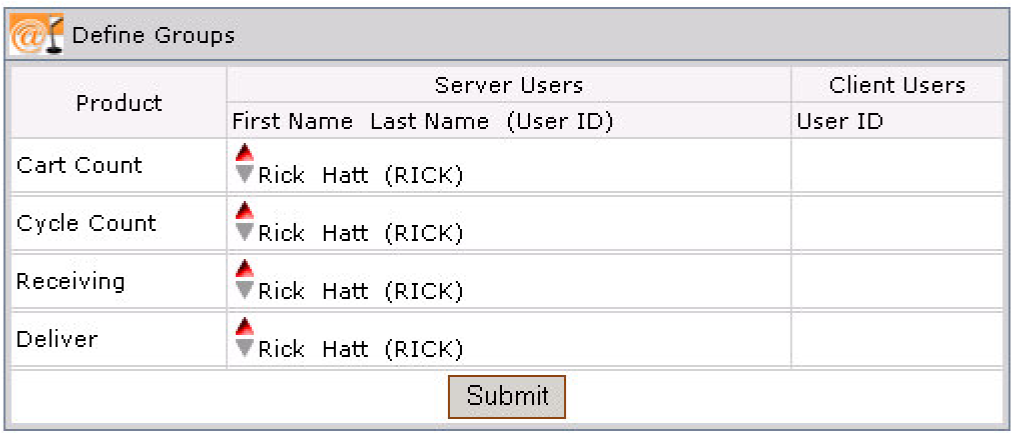


Figure 14

This screen gives you all products with their respective Server Users assigned.

Defining the product access was the first step in allowing Users access to **@Par hand held devices**. Defining the group here is the second and last step.

Click on the illuminated pyramid/triangle next to the Product you want to define.

This will provide you with the screen on the following page: ***Figure 15***

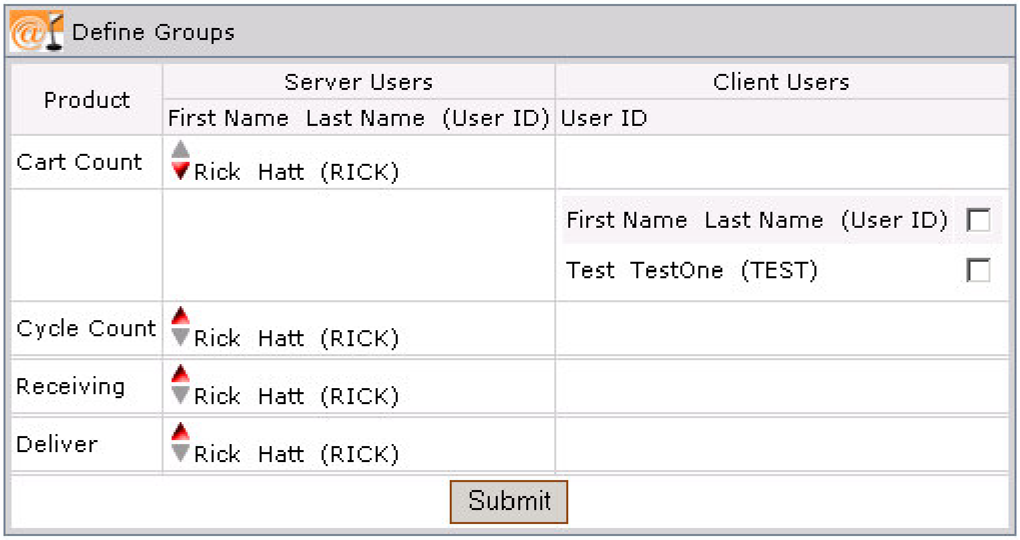


Figure 15

The user TEST appears with a blank or empty check box. ***Click*** on this check box to assign this product to TEST.

The screen remains the same. You will need to ***Click*** on the **Submit** button for the change to occur and become active.

You will need to set each user up exactly like this. You can open each Product and check all users, then ***Click*** on the **Submit** button. To select all users in each product, after opening up each product, simply ***Check*** the check box next to "First Name Last Name (User ID). This will select all users in that group. This will be a little quicker and more efficient than doing one at a time.

When you ***Click*** the **Submit** button, you will receive the following screen: ***Figure 16***

Figure 16

Click the **OK** button.

Upon completion of this step all the Users you have added will have access to the **@Par** applications.

If you wish to remove a user from a group, simply go into this function, ***Uncheck*** the checked box, and ***Click*** the **Submit** button.

Then move to **Define Product Access** and ***UNASSIGN*** the User.

The next section is **Manage Tokens**.

Manage Tokens

Selecting this option will return the following screen as an example: ***Figure 17***

Manage Tokens

User ID	Login Time	Token Expiry Time	
+ LATHA	8/26/2005 9:57:59 AM	8/27/2005 2:37:01 AM	Delete
+ LATHA	8/25/2005 5:33:19 PM	8/26/2005 10:12:21 AM	Delete
			Delete Expired Tokens

Figure 17

This will provide the administrator with User ID, Login Time, and Token Expiry time.

Clicking on the illuminated pyramid/triangle will open up the selected Token for more technical information. Please see the screen below: ***Figure 18***

Manage Tokens

User ID	Login Time	Token Expiry Time	
- LATHA	8/26/2005 9:57:59 AM	8/27/2005 2:37:01 AM	Delete
Token#: 3d82c0a86ddf8c9a1d7714d429c100025d2bcd6f084515547adc3ef0338f0ea0 **Device#:** 73000A1C7F1943A138000050BF1977E0 **Product Access:** CartCount CycleCount			
+ LATHA	8/25/2005 5:33:19 PM	8/26/2005 10:12:21 AM	Delete
			Delete Expired Tokens

Figure 18

Tokens are similar to cookies, and may need to be deleted from time to time. This shows the Token#, Device #, and Product access (or icons appearing on the hand held device) to the administrator.

Configuration Manager

This option is used to setup the ERP system connection, **@Par** Database connectivity and Debug options.

You should NOT change any section without first contacting @Par Support!

The first section contains the ERP System details. Available and required field's display (boxes appear) based on which ERP system is selected.

The example below displays options for PeopleSoft ERP systems: ***Figure 19***

ERP System Details		
Enterprise System	PeopleSoft	[Enterprise system type to which AtPar is connecting]
ERP Interface User ID	VP1	[Interface user id to communicate with enterprise system]
ERP Interface Password	●●●	[Interface password to communicate with enterprise system]
ERP Server address	192.168.1.52	[Enterprise system address]
ERP Portal Name	EMPLOYEE	[Enterprise system Portal name]
ERP Node Name	ERP	[Enterprise system Node name]
ERP Webserver Port	80	[Enterprise system Webserver Port]
ERP Site Name	ps	[Enterprise system Site name]
Stock Issue Component Interface Name	ATPARSTOCKISSUE	[Enterprise system Stock Issue Component Interface name]
Product Line		[Product line for Application Gateway Interface (Specific to Lawson)]
Download File		[File from which data to be downloaded (Specific to Meditech)]
Upload Directory		[Directory into which files to be uploaded (Specific to Meditech)]

Figure 19

All options are required for STOCK ISSUE only! If your organization does not have Stock Issue, simply leave all options except for Enterprise System, blank. Enterprise System MUST be selected.

Please see the next screen for Meditech and Matkon ERP System: ***Figure 20***

ERP System Details		
Enterprise System	Meditech	[Enterprise system type to which AtPar is connecting]
ERP Interface User ID		[Interface user id to communicate with enterprise system]
ERP Interface Password		[Interface password to communicate with enterprise system]
ERP Server address		[Enterprise system address]
ERP Portal Name		[Enterprise system Portal name]
ERP Node Name		[Enterprise system Node name]
ERP Webserver Port		[Enterprise system Webserver Port]
ERP Site Name		[Enterprise system Site name]
Stock Issue Component Interface Name		[Enterprise system Stock Issue Component Interface name]
Product Line		[Product line for Application Gateway Interface (Specific to Lawson)]
Download File	Browse	[File from which data to be downloaded (Specific to Meditech)]
Upload Directory		[Directory into which files to be uploaded (Specific to Meditech)]

Figure 20

Meditech and Matkon ERP systems download one file containing all Cart information for CartCount.

@Par uploads one file per Cart back to the Meditech and Matkon ERP systems.

In order for the system to work correctly, the directory for the files needs to be accessible by both Meditech and @Par.

Download File – Using the Browse button, select the file to download. As an example, this option should be **C:\@Par\meditech\downloads\AllStock.xml**

Upload Directory – This is the directory that will require access by both Meditech and @Par. For example **c:\@Par\uploads\.**

The next section of the Configuration Manager is the ERP Database Details. Similarly to the ERP System Details section, required fields are displayed based on which database options are selected.

See the following screen with ERP Database of Oracle selected: ***Figure 21***

ERP Database Details		
Database	Oracle	[Database type on which enterprise system is running]
Schema Name	ATPAR80	[Owner of the database objects]
User ID	ATPAR80	[User ID used by AtPar product to connect to the database]
Password	•••••••	[Password used by AtPar product to connect to the database]
Server	westleb	[Oracle: TNS name entry for database SQL Server / DB2: - Database server name / IP address]
Driver	{Microsoft ODBC for Oracle}	[Driver name used to connect to the database]
Data Source		[Database Name (Specific to SQL Server and DB2)]
Network Transport Library		[(DB2 Specific)]
Host		[Host name used to connect Remote Database (Specific to Informix)]
Service		[Service name used to connect Remote Database(Specific to Informix)]
Protocol		[Protocol used to connect Remote Database(Specific to Informix)]

Figure 21

As with the Enterprise System options shown above, the required options are based on which database you select.

Oracle databases require the Schema Name, User ID, Password, Server, and Driver options be complete.

Schema name – Owner of the database's objects.

UserID – User ID that **@Par** uses to connect to the database.

Password – The password that **@Par** uses to connect to the database.

Server – For Oracle this is the TNS name entry for the production/test database. For SQL Server/DB2 this is the database server name or IP Address.

Driver – Driver name used to connect to the database.

Selecting an ERP Database type of MS SQL Server will add one additional option. See the following screen: ***Figure 22***

ERP Database Details		
Database	Sql Server	[Database type on which enterprise system is running]
Schema Name	ATPAR80	[Owner of the database objects]
User ID	ATPAR80	[User ID used by AtPar product to connect to the database]
Password	•••••••	[Password used by AtPar product to connect to the database]
Server	westleb	[Oracle: TNS name entry for database SQL Server / DB2: - Database server name / IP address]
Driver	{SQL Server}	[Driver name used to connect to the database]
Data Source		[Database Name (Specific to SQL Server and DB2)]
Network Transport Library		[(DB2 Specific)]
Host		[Host name used to connect Remote Database (Specific to Informix)]
Service		[Service name used to connect Remote Database(Specific to Informix)]
Protocol		[Protocol used to connect Remote Database(Specific to Informix)]

Figure 22

Data Source – This is the database name specific to SQL Server and DB2.

Selecting the DB2 database type displays one additional option not yet covered. Please see the following screen: ***Figure 23***

ERP Database Details		
Database	DB2	[Database type on which enterprise system is running]
Schema Name	ATPAR80	[Owner of the database objects]
User ID	ATPAR80	[User ID used by AtPar product to connect to the database]
Password	•••••••	[Password used by AtPar product to connect to the database]
Server	westleb	[Oracle: TNS name entry for database SQL Server / DB2: - Database server name / IP address]
Driver	{IBMDADB2}	[Driver name used to connect to the database]
Data Source		[Database Name (Specific to SQL Server and DB2)]
Network Transport Library		[(DB2 Specific)]
Host		[Host name used to connect Remote Database (Specific to Informix)]
Service		[Service name used to connect Remote Database(Specific to Informix)]
Protocol		[Protocol used to connect Remote Database(Specific to Informix)]

Figure 23

Network Transport Library – Specific to DB2 only.

And lastly, selecting Informix database type will display the following screen: ***Figure 24***

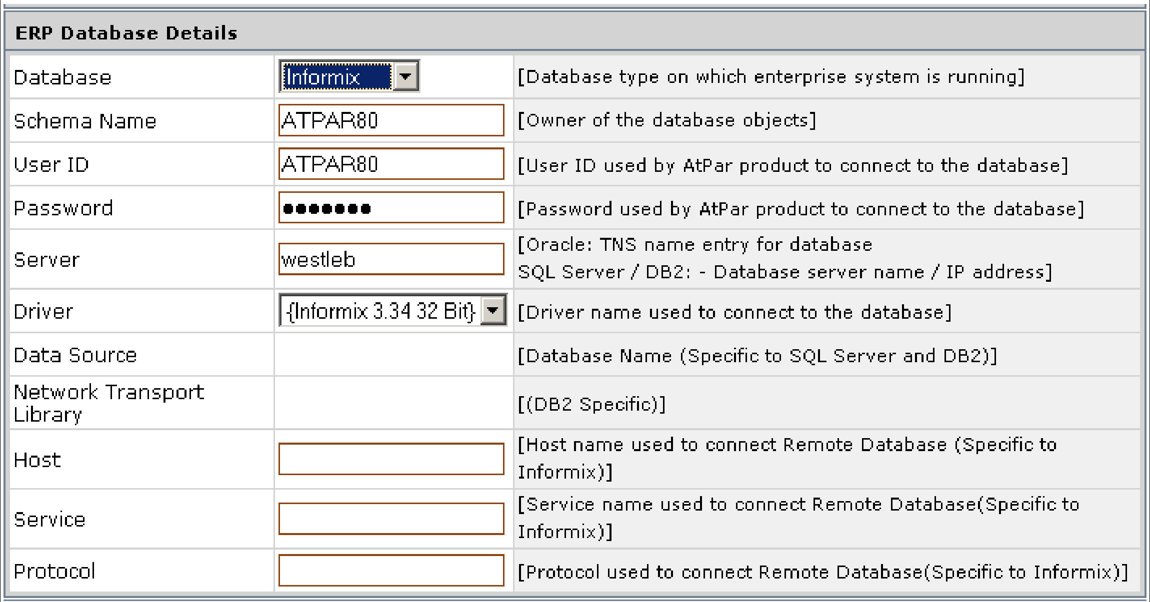


Figure 24

With Informix, the required additional fields are Data Source, Host, Service, and Protocol.

NOTE: Datasource name may NOT be displayed. You will need to go to the conf.xml file on your AtPar directory and open with Notepad. Verify the name is there and if not either enter the Datasource or contact @Par Support.

The next section of the **Configuration Manager** is the **@Par** Database details. This section is used for the **@Par Middle Tier** database setup and shouldn't be changed without contacting **@Par Support**.

See the following screen: ***Figure 25***

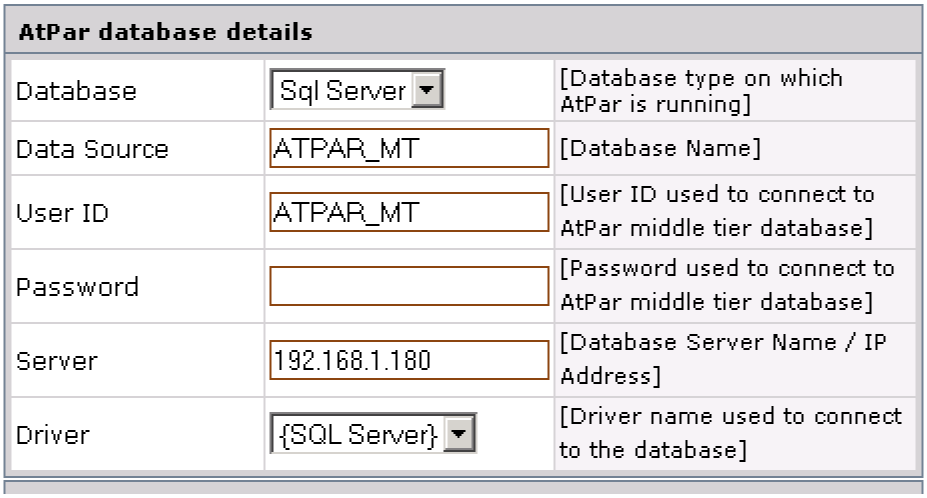


Figure 25

Database – @Par Database type on which **@Par** is running, i.e. SQL Server.

Data Source – @Par Database name.

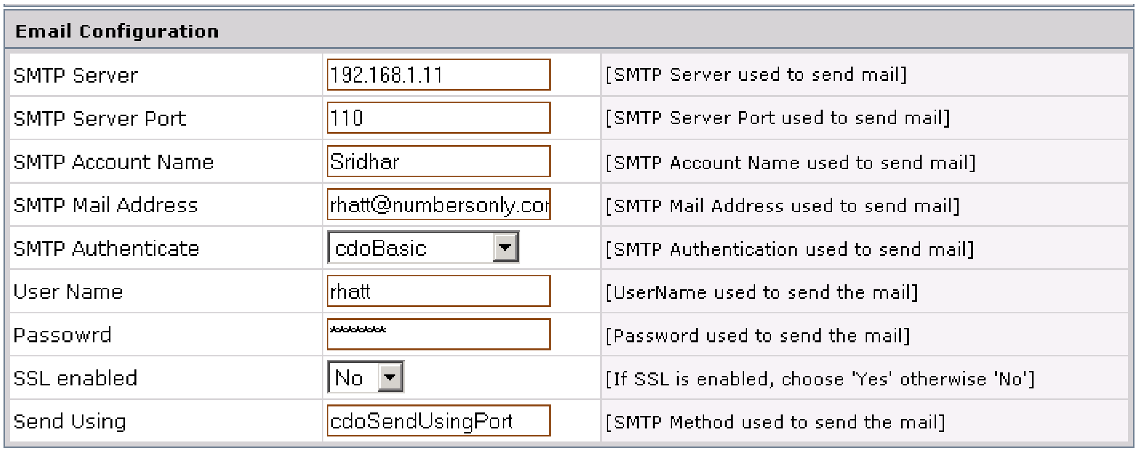
UserID – UserID used to connect to **@Par** middle tier database.

Password – Password used to connect to **@Par** middle tier database. If you installed MSDE this will default as blank. If you selected SQL Server when installing, you will enter the password from the SQL Server here.

Server – @Par Database server name or IP Address.

Driver – Driver name used to connect to the **@Par** database.

The next section is the Email Configuration. This is required to allow users to utilize the email functionality within **@Par**: ***Figure 26***



Email Configuration		
SMTP Server	192.168.1.11	[SMTP Server used to send mail]
SMTP Server Port	110	[SMTP Server Port used to send mail]
SMTP Account Name	Sridhar	[SMTP Account Name used to send mail]
SMTP Mail Address	rhatt@numbersonly.cor	[SMTP Mail Address used to send mail]
SMTP Authenticate	cdoBasic	[SMTP Authentication used to send mail]
User Name	rhatt	[UserName used to send the mail]
Passowrd	*******	[Password used to send the mail]
SSL enabled	No	[If SSL is enabled, choose 'Yes' otherwise 'No']
Send Using	cdoSendUsingPort	[SMTP Method used to send the mail]

Figure 26

SMTP Server – SMTP Server used to send mail.

SMTP Server Port – SMTP Server Port used to send mail.

SMTP Account Name – SMTP Account Name used to send mail.

SMTP Mail Address – SMTP Mail Address used to send mail.

SMTP Authenticate – This is a drop down box used to select the SMTP Authentication used to send mail.

Send User Name – User Name used to send mail.

Send Password – User Password used to send mail.

SMTP Use SSL – Drop down list to choose whether to use SSL or Not to send mail. Selecting True will use SSL to send mail. Selecting False will not use SSL to send mail.

Send Using – SMTP Method used to send mail.

The final section of the configuration manager is **System parameters**. Please see the screen shot below: ***Figure 27***

System Parameters		
Error Log mode	DEBUG	[Error Log mode Normal - Only Error Code will be stored, Debug - Error Code with custom string will be stored]
Debug Log path	C:\AtPar\	[Directory to store the debug files]
Debug on User Management	☐	[Option to switch on Debug mode for User Management]
Debug on Cart Count	☐	[Option to switch on Debug mode for Cart Count]
Debug on Cycle Count	☐	[Option to switch on Debug mode for Cycle Count]
Debug on Receiving	☐	[Option to switch on Debug mode for Receiving]
Debug on Deliver	☑	[Option to switch on Debug mode for Deliver]
Debug on Pick Plan	☐	[Option to switch on Debug mode for Pick Plan]
Debug on PutAway	☐	[Option to switch on Debug mode for PutAway]
Debug on TrackIT	☐	[Option to switch on Debug mode for TrackIT]
Debug on StockIssue	☐	[Option to switch on Debug mode for StockIssue]

Submit

Figure 27

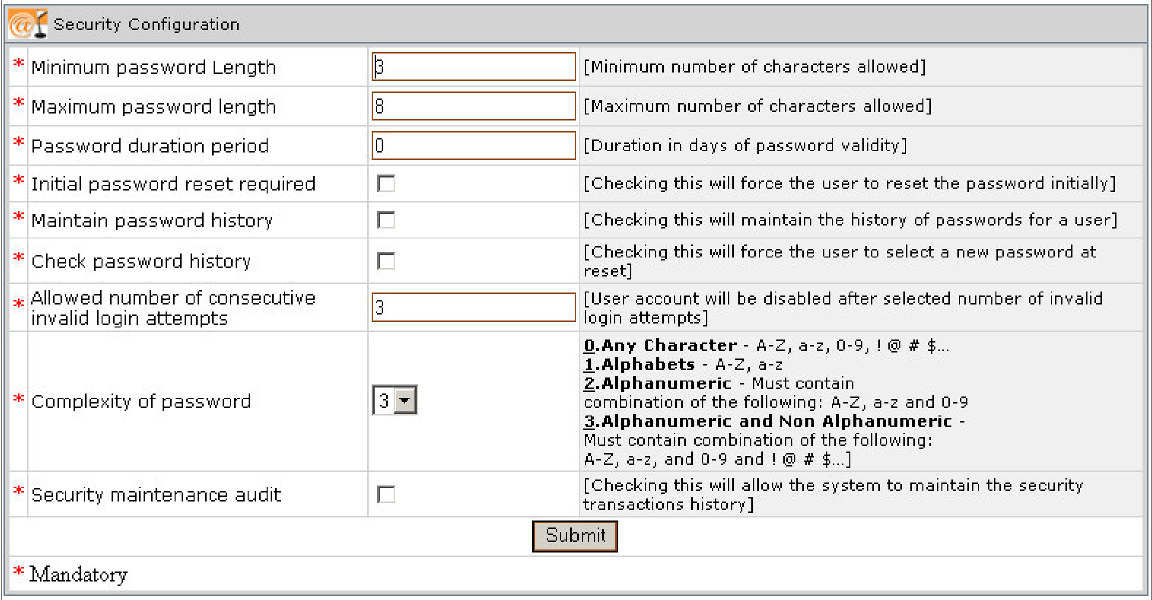
This section is primarily used in association with **@Par Support**. The Support department may need to turn debugging on to troubleshoot a problem with the software. They may ask you to turn debugging on for an associated product, i.e. CartCount.

Simply ***Check*** the box next to the “Debug on Cart Count” and ***Click*** the **Submit** button.

Support will then ask you to rerun the process that created an error before so they can determine the problem.

Security Configuration

This is a new feature in 2.5 and newer releases. This allows Administrators to further define user passwords, as well as set more defined parameters. ***Clicking*** on this option will provide you with the following screen: ***Figure 28***



Security Configuration

* Minimum password Length	8	[Minimum number of characters allowed]
* Maximum password length	8	[Maximum number of characters allowed]
* Password duration period	0	[Duration in days of password validity]
* Initial password reset required	☐	[Checking this will force the user to reset the password initially]
* Maintain password history	☐	[Checking this will maintain the history of passwords for a user]
* Check password history	☐	[Checking this will force the user to select a new password at reset]
* Allowed number of consecutive invalid login attempts	3	[User account will be disabled after selected number of invalid login attempts]
* Complexity of password	3	**0.Any Character** - A-Z, a-z, 0-9, ! @ # $... **1.Alphabets** - A-Z, a-z **2.Alphanumeric** - Must contain combination of the following: A-Z, a-z and 0-9 **3.Alphanumeric and Non Alphanumeric** - Must contain combination of the following: A-Z, a-z, and 0-9 and ! @ # $...]
* Security maintenance audit	☐	[Checking this will allow the system to maintain the security transactions history]

Submit

* Mandatory

Figure 28

Minimum password length – This is the minimum number of characters the password may be.

Maximum password length – This is the maximum number of characters the password may be.

Password duration period – Enter in days, the duration that passwords are valid.

Initial password set required – Checking this box will force the user to initially change the password.

Maintain password history – Checking this box will maintain password history on users.

Check password history – Checking this box will force the user
to select a new password at reset. The system will check the new password against all passwords in the user's history. It will not allow the user to use an old one already used by that user.

Allowed number of consecutive invalid login attempts – User account will be disabled after selected number of invalid attempts are reached.

Complexity of password – If an option is selected, the passwords must use the rules to which the accompanying number designates. For example, if you select 1 as the complexity, passwords will only be allowed to use Alphabetical characters.

Security maintenance audit – Check this box allows the system to maintain the security transactional data for historical purposes.

When you have completed setting up the security, you need to ***Click*** on the **Submit** button in order for the changes to be retained.

Product Parameters

This section allows the setup of global Product Parameters. The global Product Parameters are named such as the settings effect the entire (Global) product, not just one user.

It is important NOT to change settings without testing first.

When you ***Click*** on the **Product Parameters** option, you will see the screen below: ***Figure 29***

Figure 29

The next step is to select the product you wish to set parameters on by selecting it from the Drop Down list.

Products displayed are based on your organization's **@Par** products.

See the next screen: ***Figure 30***

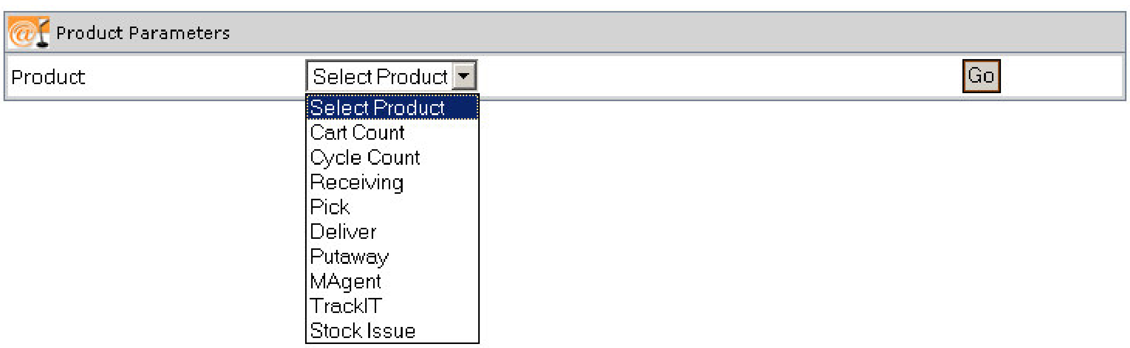


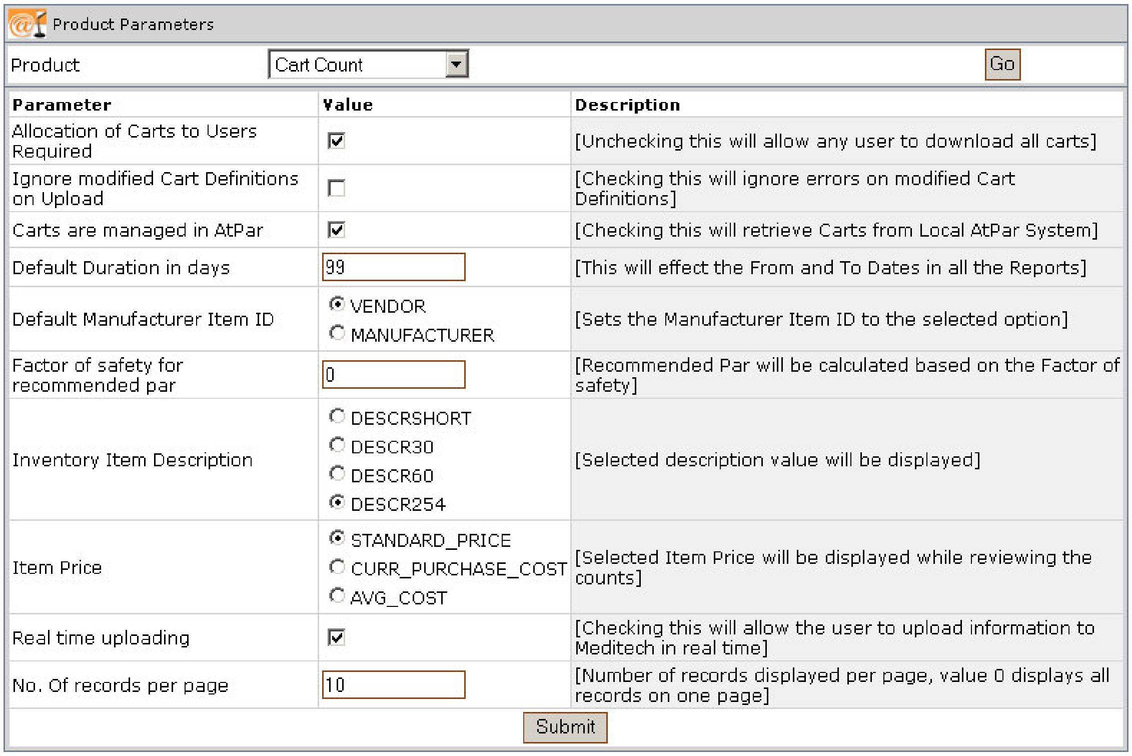
Figure 30

Select the product by highlighting it, then clicking on it. Once you have selected the product to set up, ***Click*** the **Go** button.

We will begin by looking at the **CartCount** product parameters.

Highlight **Cart Count** and ***Click*** on the **Go** button.

You will now see the following screen: ***Figure 31***



Product Parameters

Product: Cart Count — Go

Parameter	Value	Description
Allocation of Carts to Users Required	☑	[Unchecking this will allow any user to download all carts]
Ignore modified Cart Definitions on Upload	☐	[Checking this will ignore errors on modified Cart Definitions]
Carts are managed in AtPar	☑	[Checking this will retrieve Carts from Local AtPar System]
Default Duration in days	99	[This will effect the From and To Dates in all the Reports]
Default Manufacturer Item ID	(•) VENDOR ( ) MANUFACTURER	[Sets the Manufacturer Item ID to the selected option]
Factor of safety for recommended par	0	[Recommended Par will be calculated based on the Factor of safety]
Inventory Item Description	( ) DESCRSHORT ( ) DESCR30 ( ) DESCR60 (•) DESCR254	[Selected description value will be displayed]
Item Price	(•) STANDARD_PRICE ( ) CURR_PURCHASE_COST ( ) AVG_COST	[Selected Item Price will be displayed while reviewing the counts]
Real time uploading	☑	[Checking this will allow the user to upload information to Meditech in real time]
No. Of records per page	10	[Number of records displayed per page, value 0 displays all records on one page]

Submit

Figure 31

NOTE: Based on your ERP system, you may receive a modified screen from Fig. 31. This screen will depict the PeopleSoft ERP.

Allocation of Carts to Users Required – Unchecking this will allow users to download all the carts. It is recommended to keep this checked to allow users to download only allocated carts.

Ignore modified Cart Definitions on Upload – Checking this option will allow clients to upload carts whose definitions have changed on the server.

Carts are managed in AtPar – Checked will allow AtPar to manage all Cart/Par Locations. Unchecked Cart/Par Locations will use ERP database.

Default Duration in days – Duration in days for which all reports are configured by default. In other words, the number of days the From and To date on reports will reflect.

Default Manufacturer Item ID – Used in the client to default between Vendor and Manufacturer Item ID. Its use depends on the setup in the ERP system.

Factor of safety for recommended par – Enter numeric value to base the factor of safety for par levels.

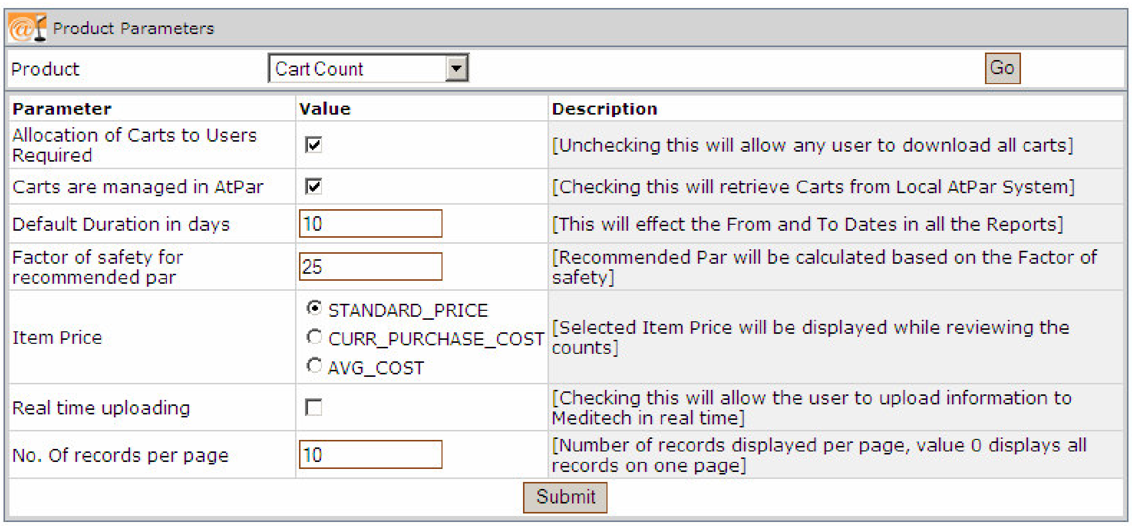
Inventory Item Description – Used by the client to download descriptions specified in the ERP system.

Item Price – The item price to display while reviewing counts.

Real Time uploading – Check to upload information to ERP system in Real Time. Uncheck to manually batch process to run.

No. of Records per page - Used by the 'Allocate Carts' screen to limit the number of carts to shown at a time on the screen.

The following Product Parameter screen will be seen in the Meditech environment.


Product Parameters

Product: Cart Count [Go]

Parameter	Value	Description
Allocation of Carts to Users Required	☑	[Unchecking this will allow any user to download all carts]
Carts are managed in AtPar	☑	[Checking this will retrieve Carts from Local AtPar System]
Default Duration in days	10	[This will effect the From and To Dates in all the Reports]
Factor of safety for recommended par	25	[Recommended Par will be calculated based on the Factor of safety]
Item Price	◉ STANDARD_PRICE ○ CURR_PURCHASE_COST ○ AVG_COST	[Selected Item Price will be displayed while reviewing the counts]
Real time uploading	☐	[Checking this will allow the user to upload information to Meditech in real time]
No. Of records per page	10	[Number of records displayed per page, value 0 displays all records on one page]

Submit

Screen Display Setup

This option allows for some modification to existing Product screens within each product. You are able to change field labels, add fields to display, and change field display lengths.

Upon selecting this option the user must select a **@Par** product from the list. Please see the following screen: ***Figure 32***

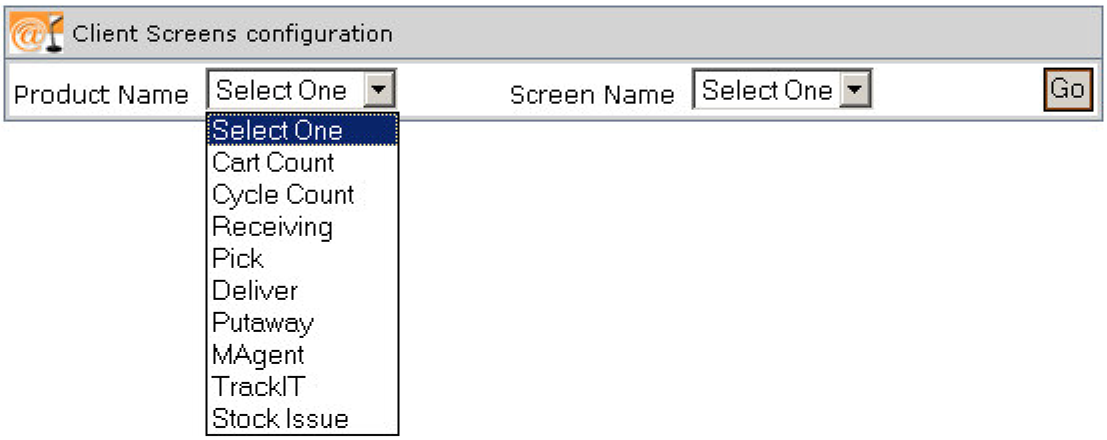


Figure 32

Highlight* Cart Count** from the drop down list and ***Click the **GO** button. The following screen will display: ***Figure 33***

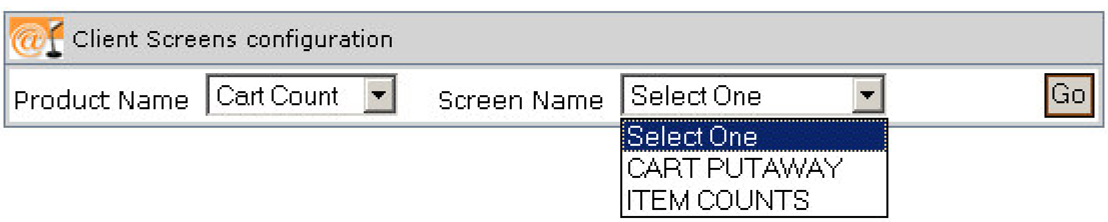


Figure 33

You have the option to change information on two screens:

- **Cart PutAway**
- **Item Counts**

The following screen is the **Cart PutAway**: ***Figure 34***

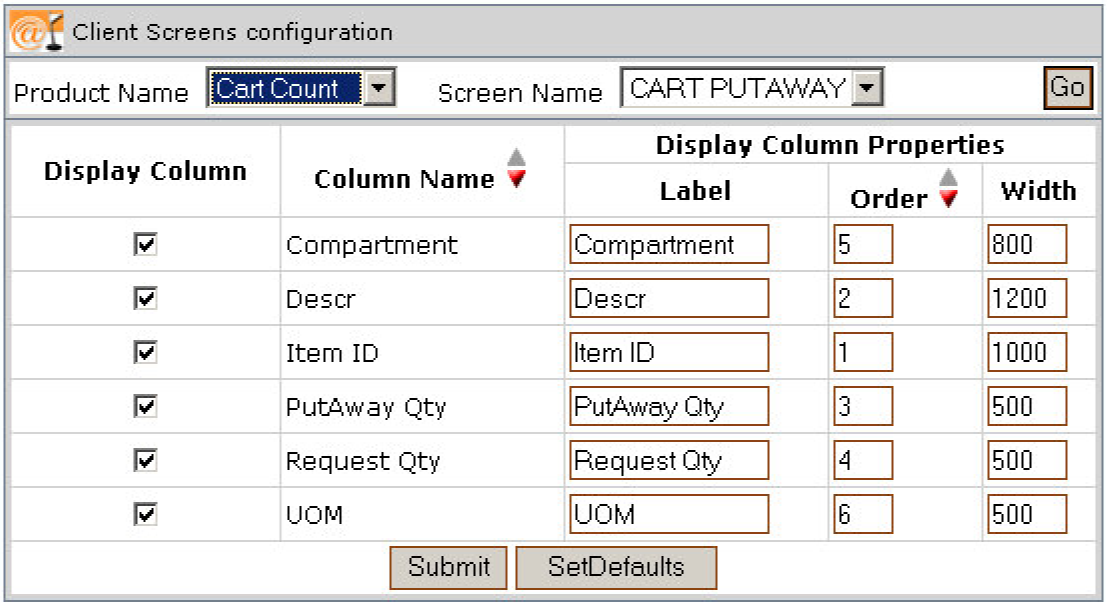


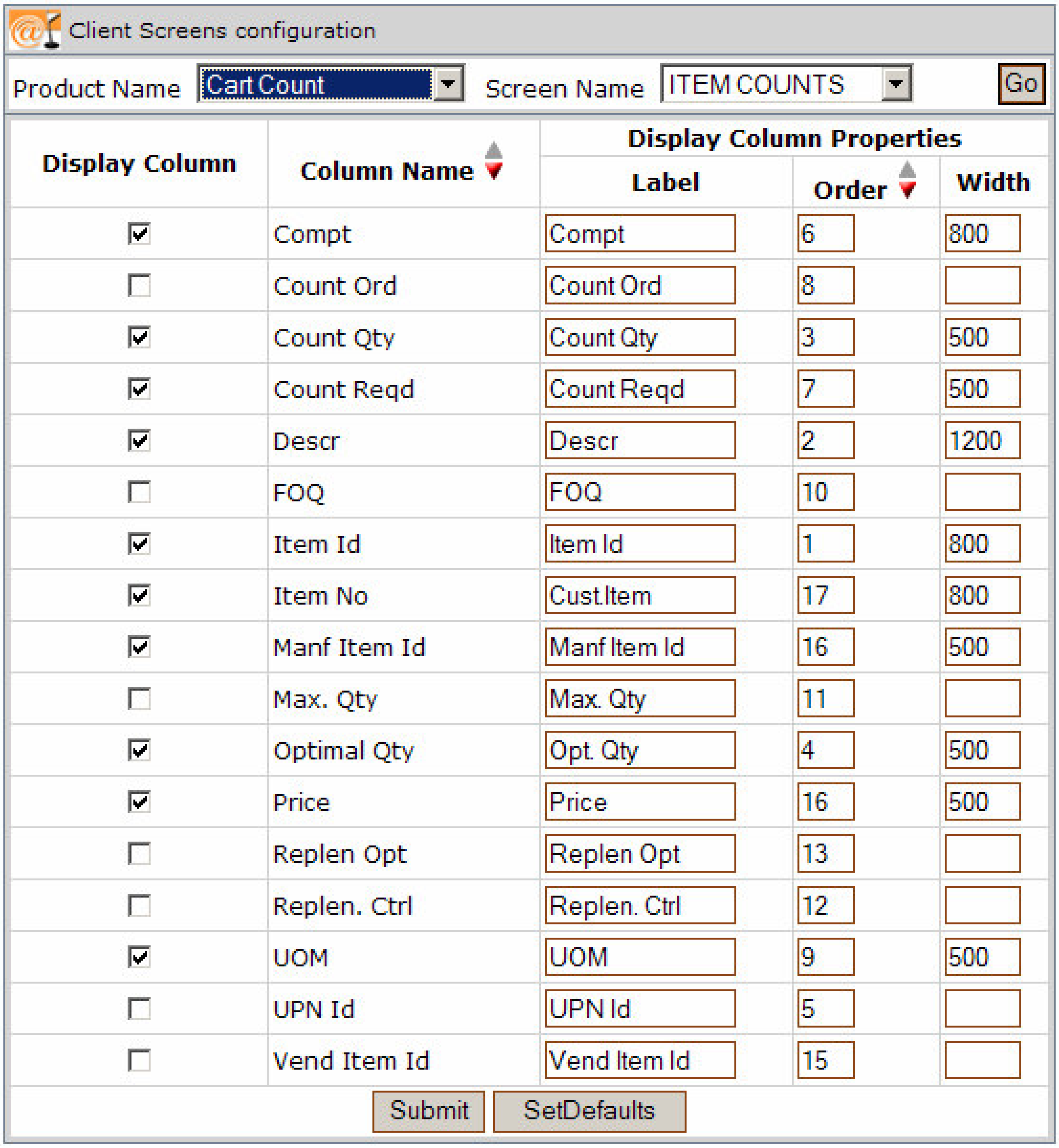
Figure 34

The records displayed above show the actual labels that users of the client or hand held devices will see on the device.

If you want to change a label simply type in the label field for that column and type in the name you want to display.

Order denotes the order in which the column will be displayed in the list view and width denotes the size of the field in the list.

The following screen is the Items count screen, where users actually perform their Cart counting:



Display Column	Column Name	Display Column Properties		
		Label	Order	Width
☑	Compt	Compt	6	800
☐	Count Ord	Count Ord	8	
☑	Count Qty	Count Qty	3	500
☑	Count Reqd	Count Reqd	7	500
☑	Descr	Descr	2	1200
☐	FOQ	FOQ	10	
☑	Item Id	Item Id	1	800
☑	Item No	Cust.Item	17	800
☑	Manf Item Id	Manf Item Id	16	500
☐	Max. Qty	Max. Qty	11	
☑	Optimal Qty	Opt. Qty	4	500
☑	Price	Price	16	500
☐	Replen Opt	Replen Opt	13	
☐	Replen. Ctrl	Replen. Ctrl	12	
☑	UOM	UOM	9	500
☐	UPN Id	UPN Id	5	
☐	Vend Item Id	Vend Item Id	15	

Submit SetDefaults

F

Figure 35

The records displayed above show the actual labels that users of the client or hand held devices will see on the device.

If you want to change a label simply type in the label field for that column and type in the name you want to display.
Order denotes the order in which the column will be displayed in the list view and width denotes the size of the field in the list.

By default, Count Quantity and Item ID will always be downloaded and displayed.

IMPORTANT NOTE: Adding many items to this list will increase the download and refresh times on the hand held device.

After you have finished making necessary changes, ***Click*** on the **Submit** button.

Users will have to login again to see the changes.

User Status Report

This option has been added to view active and inactive users. When you select this option, the following screen will display: ***Figure 36***

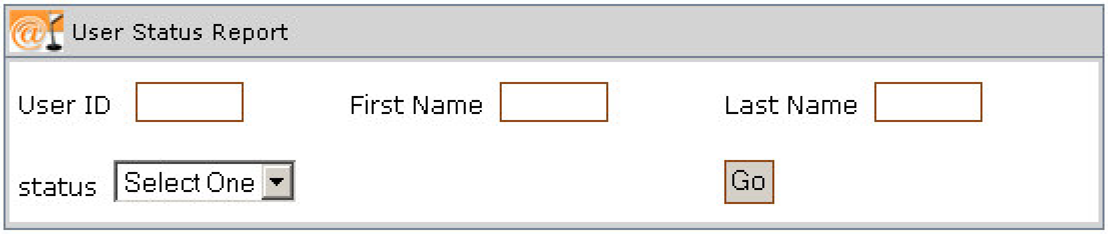


Figure 36

Search options are User ID, First Name, Last Name and, using the drop down Status option, Active and Inactive. In the following example, a search by ACTIVE users was performed: ***Figure 37***

User Status Report

User ID   First Name   Last Name

status: Active   Go

User ID	First Name	Last Name	Create Date	AccountStatus	Action
BOSS	boss	boss	12/16/2005 2:45:12 PM	Active	InActivate
BUG735	Bug	Test	1/10/2006 9:39:53 AM	Active	InActivate
BURT	burt	burt	1/27/2006 3:28:49 PM	Active	InActivate
DAN	dan	dan	12/16/2005 2:46:29 PM	Active	InActivate
ERNIE	ernie	ernie	1/27/2006 3:28:36 PM	Active	InActivate
FRED	Fred	Fred	1/3/2006 4:28:28 PM	Active	InActivate
GARY	gary	gary	12/16/2005 2:46:18 PM	Active	InActivate
GINGER	Ginger	Ginger	1/3/2006 4:33:32 PM	Active	InActivate
LATHA	latha	pagad	1/3/2006 4:17:54 PM	Active	InActivate
NEWBIE	New	Bie	3/22/2006 11:45:35 AM	Active	InActivate
OSCAR	oscar	oscar	1/27/2006 3:29:17 PM	Active	InActivate
RICK	rick	rick	12/16/2005 2:46:40 PM	Active	InActivate
SRINIVAS	srinivas	srinivas	12/16/2005 2:47:04 PM	Active	InActivate
TEST	Test	Test	1/4/2006 5:50:17 PM	Active	InActivate
TEST_PACE	Test	Space	2/15/2006 10:06:40 AM	Active	InActivate
WILMA	Wilma	F	3/20/2006 5:02:45 PM	Active	InActivate

Figure 37

User ID - @Par User ID used for login.

First Name – User's first name.

Last Name – User's last name.

Create Date – Date user was created in **@Par**.

AccountStatus – User's status, either Active or Inactive.

Action – User can be activated or inactivated using this option.

Logging in as @Par Server User

When you connect to the **@Par Server**, the first screen that appears is the **Login** screen: ***Figure 38***

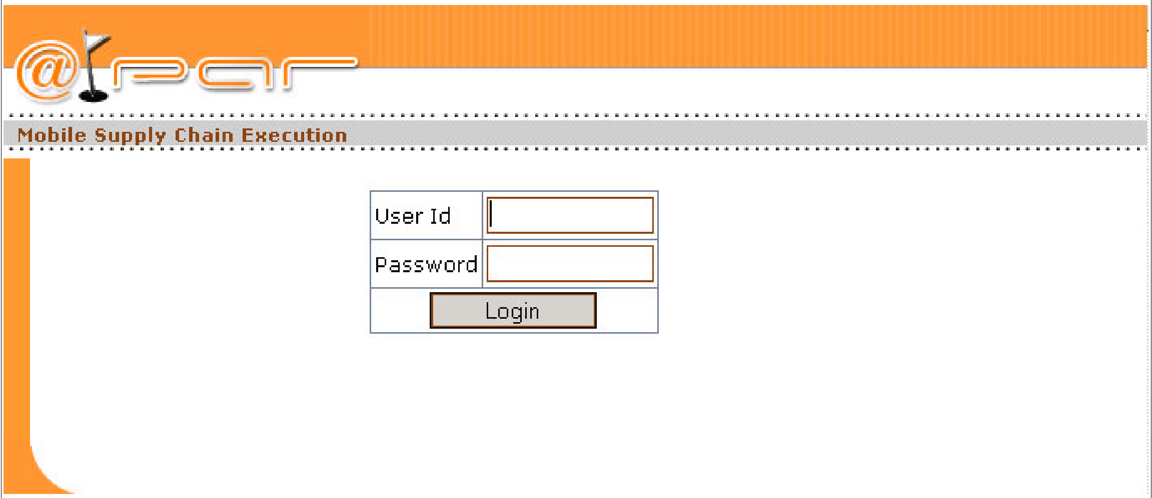


Figure 38

The **@Par Server** Administrator will set the Functional Managers up with a UserID and Password. Use this information to login to **@Par** and you will see the screen: ***Figure 39***

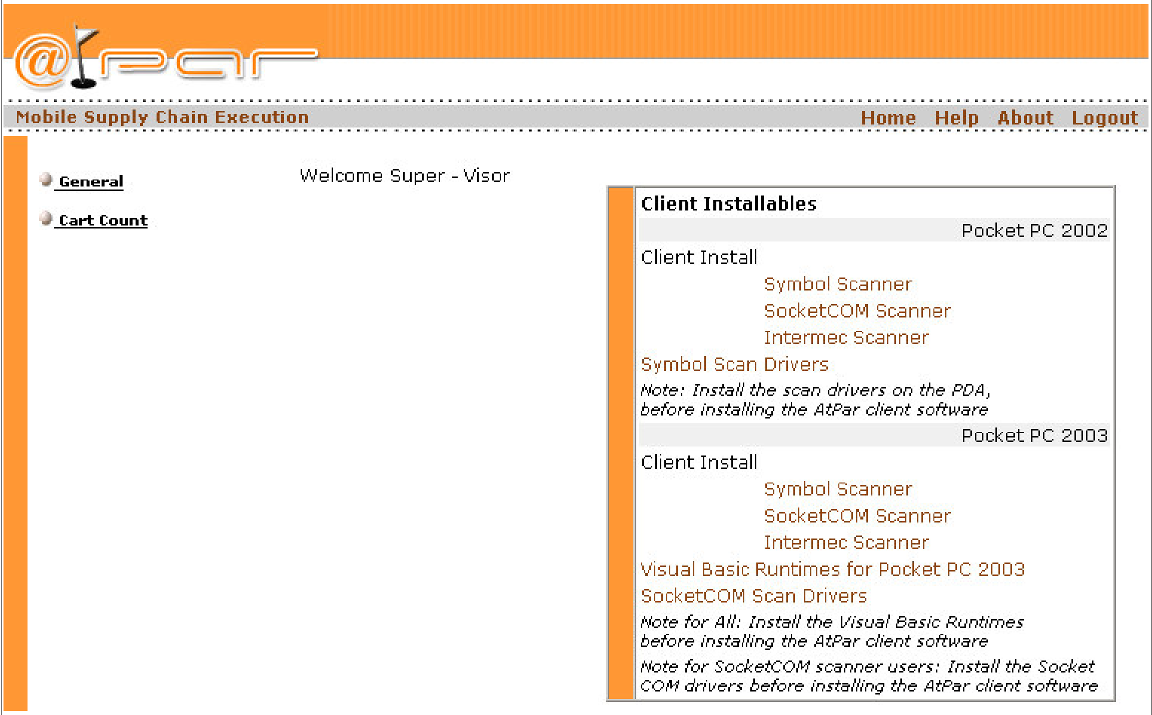


Figure 39

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

The **General** function should only be used by the **@Par** Administrator. They are both covered in detail in the **@Par Server User Guide** documentation.

This manual will look at the Cart Count setup. Selecting Cart Count above will give you the following: ***Figure 40***

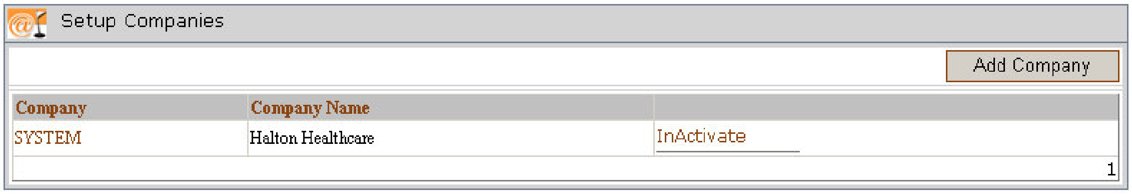

Mobile Supply Chain Execution
General
Welcome Rick - Hatt
Cart Count
Setup Companies
Setup Vendors
Setup Departments
Setup Items
Setup Par Locations
Manage Par Locations
Critical Items
User Parameters
Allocate Carts
Manage Orders
Order History
Schedule Compliance Report
Cart Averages Report
Cart Detail Report
Item Exception Report
Item Usage Report
Optimization Report
Daily Activity Report
Daily User Activity Report
User Productivity Report
Cart Putaway Report
Par Audit Report
Activity Report

Figure 40

Setup Companies

The first step in setting **Par Managemen**t up is to create a Company or Organization.

Select the **Setup Companies** option from the **Cart Count** menu option and you will receive the following screen: ***Figure 47***



Setup Companies

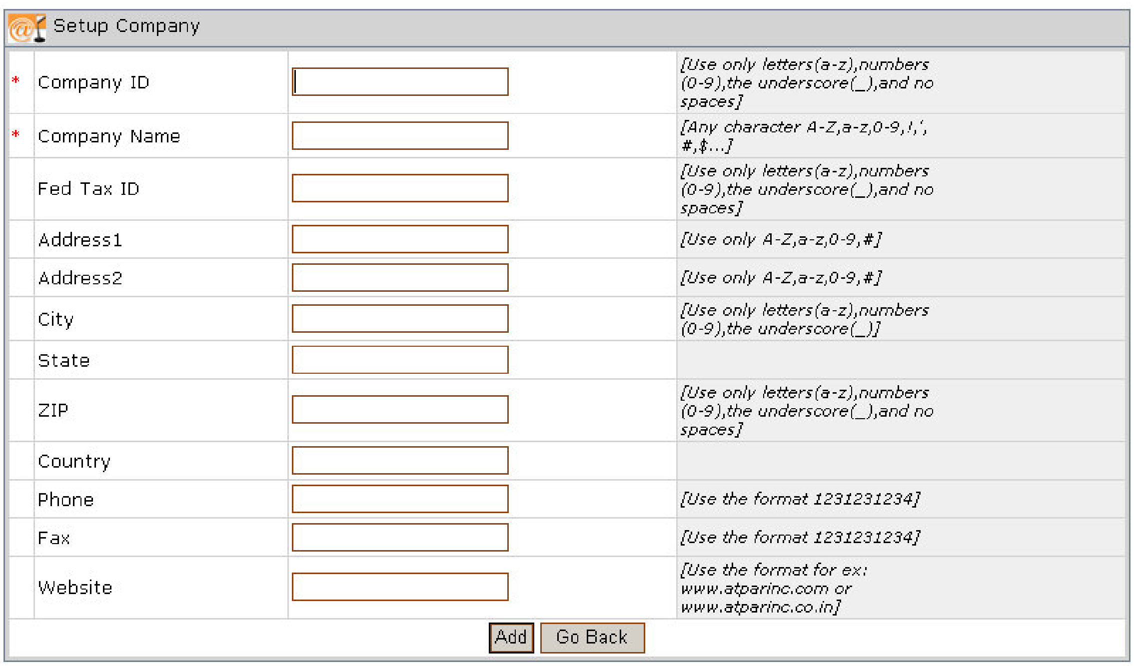
Add Company

Company	Company Name	
SYSTEM	Halton Healthcare	InActivate
		1

igure 47

This example shows one active company. To inactivate it, ***click*** the **InActivate** button.

If the company you need to set up doesn't appear on this list, ***click*** on the **Add Company** button. You should now see the following screen: ***Figure 48***



Setup Company

* Company ID		[Use only letters(a-z),numbers (0-9),the underscore(_),and no spaces]
* Company Name		[Any character A-Z,a-z,0-9,!,',#,$...]
Fed Tax ID		[Use only letters(a-z),numbers (0-9),the underscore(_),and no spaces]
Address1		[Use only A-Z,a-z,0-9,#]
Address2		[Use only A-Z,a-z,0-9,#]
City		[Use only letters(a-z),numbers (0-9),the underscore(_)]
State		
ZIP		[Use only letters(a-z),numbers (0-9),the underscore(_),and no spaces]
Country		
Phone		[Use the format 1231231234]
Fax		[Use the format 1231231234]
Website		[Use the format for ex: www.atparinc.com or www.atparinc.co.in]

Add Go Back

Figure 48

Mandatory fields are noted with an asterisk (*).

Company ID – Enter a unique Company ID identifier.

Company Name – Enter the full Company Name.

Fed Tax ID – Enter the Company's Federal Tax ID.

Address1 – Enter the Company's address.

Address2 – Enter the company's secondary address.

City – Enter the Company's city.

State – Enter the Company's state.

ZIP – Enter the Company's zip code.

Country – Enter the Company's country.

Phone – Enter the Company's main phone number.

Fax – Enter the Company's main fax number.

Website – Enter the Company's web site.

After entering all the necessary information, ***click*** the **Add** button to save the information.

Clicking the **Go Back** button will return you to the previous screen without saving the information.

NOTE: You are not allowed to delete a Company once saved. If you make an error and save a Company, the only option is to Inactivate the Company that was set up incorrectly.

To edit an existing company, ***Click*** the **Company ID** in the left hand column: ***Figure 49***

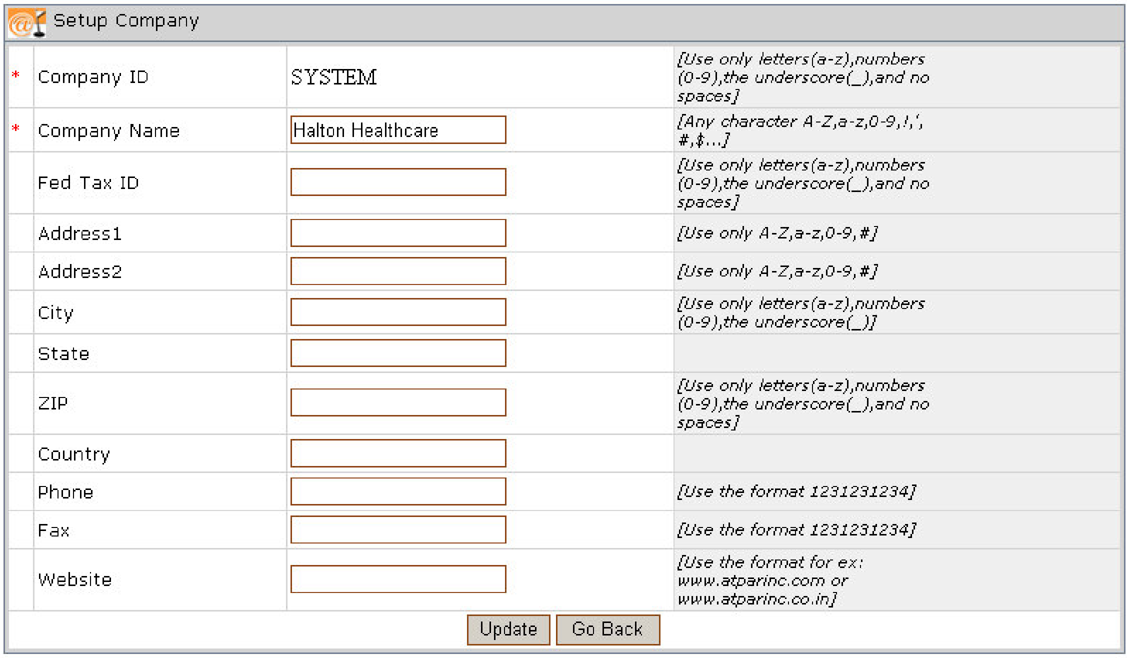


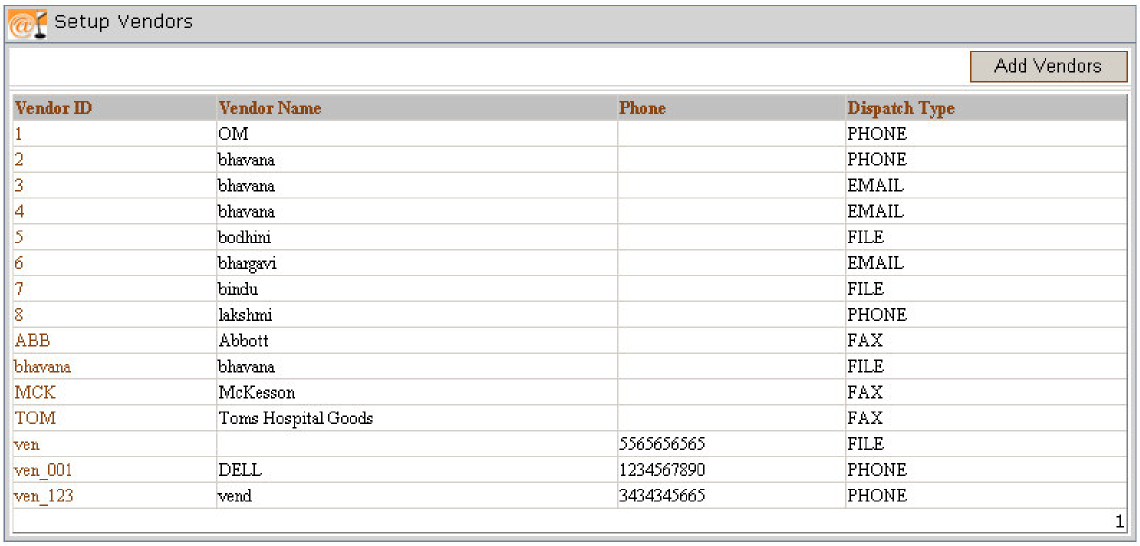
Figure 49

After editing is complete you must ***click*** the **Update** button to save modifications or ***Click*** the **Go Back** button to return to previous screen.

Setup Vendors

The second step in setting up **Par Management** is to create Vendors.

Select the **Setup Vendors** option from the **Cart Count** menu option and you will receive the following screen: ***Figure 50***

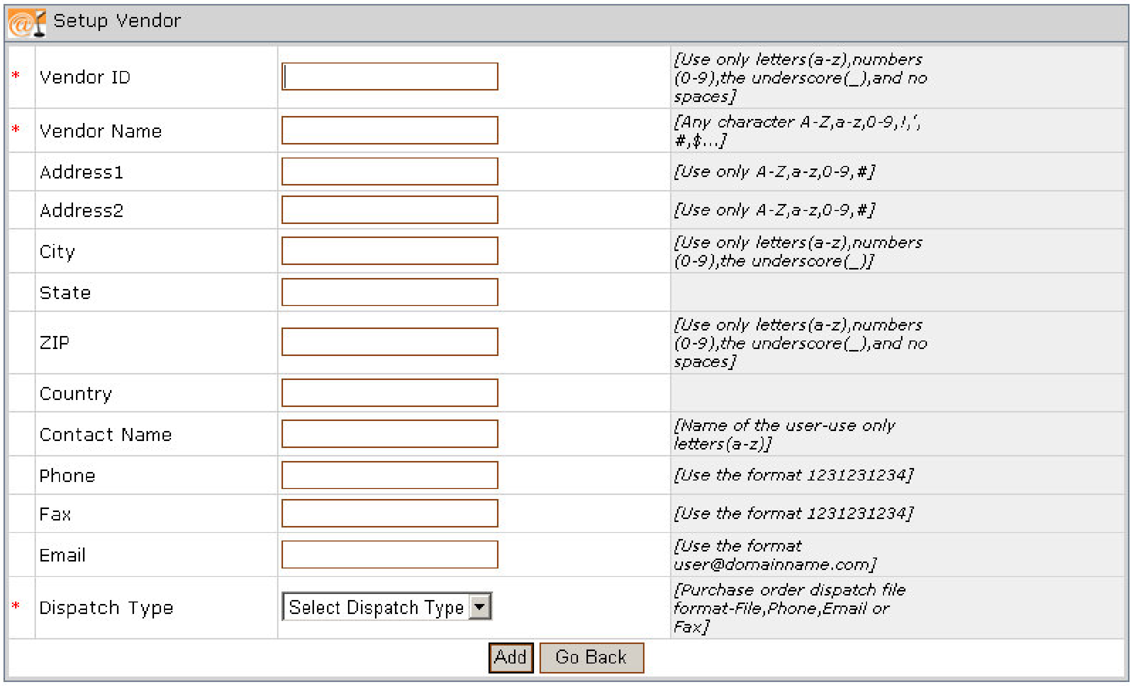


Vendor ID	Vendor Name	Phone	Dispatch Type
1	OM		PHONE
2	bhavana		PHONE
3	bhavana		EMAIL
4	bhavana		EMAIL
5	bodhini		FILE
6	bhargavi		EMAIL
7	bindu		FILE
8	lakshmi		PHONE
ABB	Abbott		FAX
bhavana	bhavana		FILE
MCK	McKesson		FAX
TOM	Toms Hospital Goods		FAX
ven		5565656565	FILE
ven_001	DELL	1234567890	PHONE
ven_123	vend	3434345665	PHONE

1

Figure 50

In this example, you can see that there are multiple vendors already set up. If the vendor you need to set up doesn't appear on this list, ***Click*** on the **Add Vendors** button. You now see the following screen: ***Figure 51***



Setup Vendor

*	Vendor ID		[Use only letters(a-z),numbers (0-9),the underscore(_),and no spaces]
*	Vendor Name		[Any character A-Z,a-z,0-9,!,', #,$...]
	Address1		[Use only A-Z,a-z,0-9,#]
	Address2		[Use only A-Z,a-z,0-9,#]
	City		[Use only letters(a-z),numbers (0-9),the underscore(_)]
	State		
	ZIP		[Use only letters(a-z),numbers (0-9),the underscore(_),and no spaces]
	Country		
	Contact Name		[Name of the user-use only letters(a-z)]
	Phone		[Use the format 1231231234]
	Fax		[Use the format 1231231234]
	Email		[Use the format user@domainname.com]
*	Dispatch Type	Select Dispatch Type	[Purchase order dispatch file format-File,Phone,Email or Fax]

Add   Go Back

Figure 51

Mandatory fields are noted with an asterisk (*).

Vendor ID – Enter a unique Vendor ID identifier.

Vendor Name – Enter the full Vendor Name.

Address1 – Enter the Vendor's address.

Address2 – Enter the Vendor's secondary address.

City – Enter the Vendor's city.

State – Enter the Vendor's state.

ZIP – Enter the Vendor's zip code.

Country – Enter the Vendor's country.

Contact Name – Enter the Vendor's primary contact person.

Phone – Enter the company's main phone number.

Fax – Enter the company's main fax number.

Email – Enter the Vendor's email address.

Dispatch Type – Select the mode used by the Vendor to receive orders. There are 4 dispatch types: Fax, Phone, Email, and File.

After entering all the necessary information, ***click*** the **Add** button to save the information.

Clicking the **Go Back** button will return you to the previous screen without saving the information.

NOTE: You are not allowed to delete a Vendor once saved. If you make an error and save a Vendor, the only option is to Inactivate the Vendor that was set up incorrectly.

To edit an existing company, ***click*** the **Vendor ID** in the left hand column: ***Figure 52***

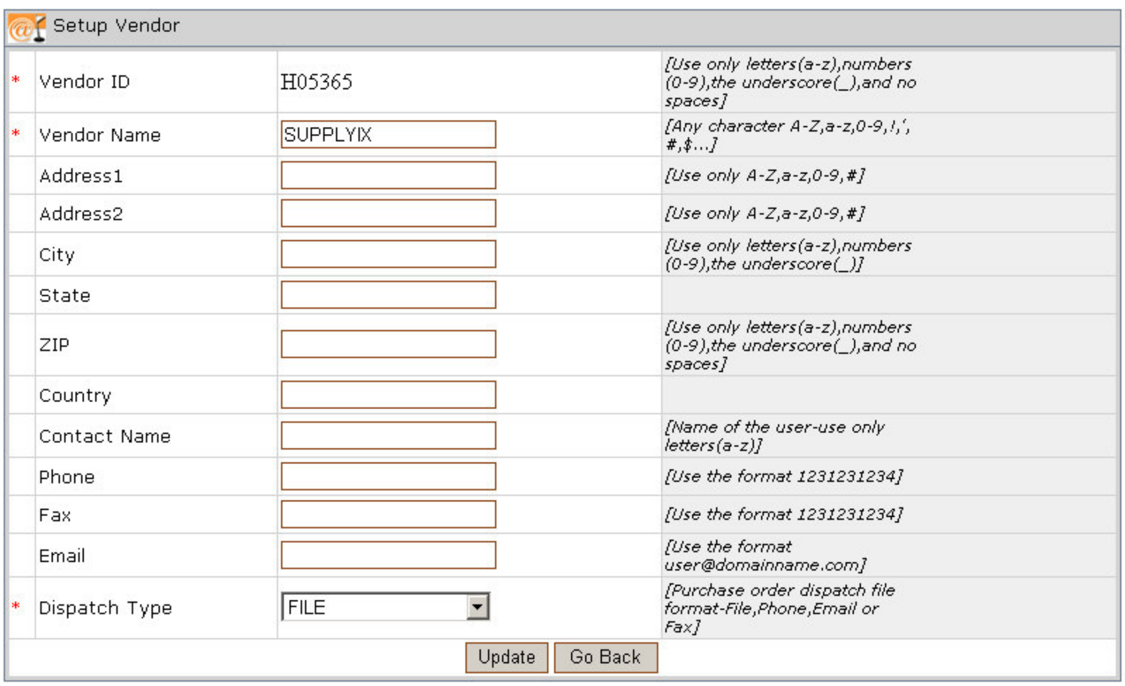


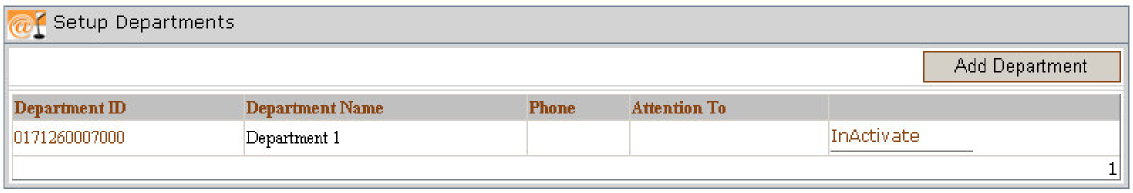
Figure 52

After edit is complete you must ***click*** the **Update** button to save modifications or ***click*** the **Go Back** button to return to previous screen.

Setup Departments

The third step in setting up **Par Management** is to create Departments.

Select the **Setup Departments** option from the **Cart Count** menu option and you will receive the following screen: ***Figure 53***


Setup Departments

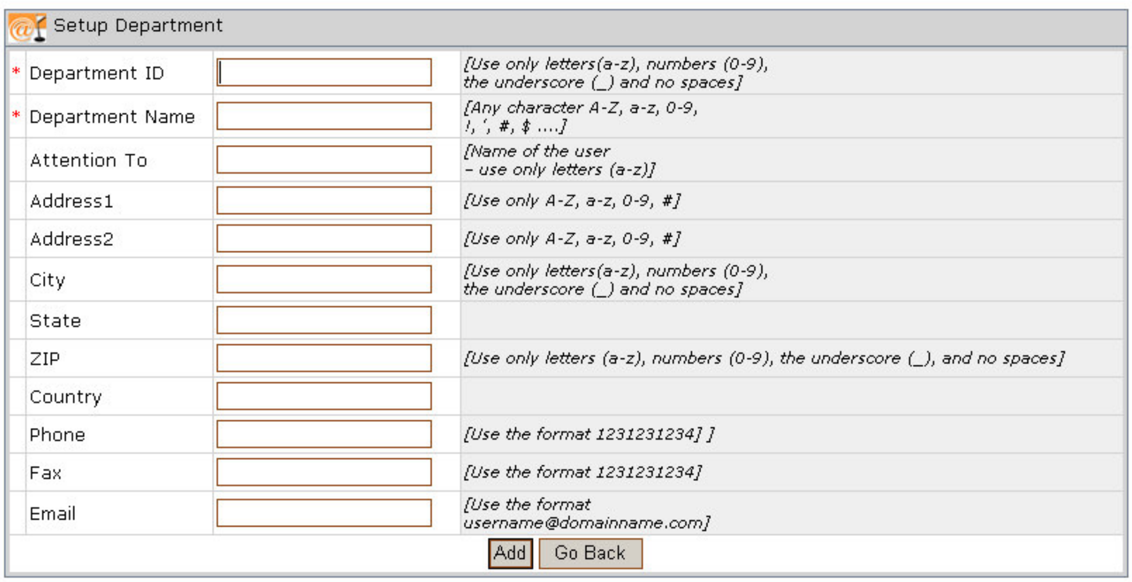
Add Department

Department ID	Department Name	Phone	Attention To	
0171260007000	Department 1			InActivate

1

Figure 53

In this example, you can see that there is a department already set up. If the department you need to set up doesn't appear on this list, ***Click*** on the **Add Depts** button. You now see the following screen: ***Figure 54***


Setup Department

* Department ID		[Use only letters(a-z), numbers (0-9), the underscore (_) and no spaces]
* Department Name		[Any character A-Z, a-z, 0-9, !, ', #, $ ....]
Attention To		[Name of the user – use only letters (a-z)]
Address1		[Use only A-Z, a-z, 0-9, #]
Address2		[Use only A-Z, a-z, 0-9, #]
City		[Use only letters(a-z), numbers (0-9), the underscore (_) and no spaces]
State		
ZIP		[Use only letters (a-z), numbers (0-9), the underscore (_), and no spaces]
Country		
Phone		[Use the format 1231231234]]
Fax		[Use the format 1231231234]
Email		[Use the format username@domainname.com]

Add Go Back

Figure 54

Mandatory fields are noted with an asterisk (*).

Department ID – Enter a unique Department ID identifier.

Department Name – Enter the full Department Name.

Attention to – Enter the Department's primary contact person.

Address1 – Enter the Department's address.

Address2 – Enter the Department's secondary address.

City – Enter the Department's city.

State – Enter the Department's state.

ZIP – Enter the Department's zip code.

Country – Enter the Department's Country.

Phone – Enter the Department's main phone number.

Fax – Enter the Department's main fax number.

Email – Enter the Department's email address.

After entering all the necessary information, ***Click*** the **Add** button to save the information.

Clicking the **Go Back** button will return you to the previous screen without saving the information.

To edit an existing company, ***Click*** the **Department ID** in the left hand column: ***Figure 55***

NOTE: You are not allowed to delete a Department once saved. If you make an error and save a Department, the only option is to Inactivate the Department that was set up incorrectly.

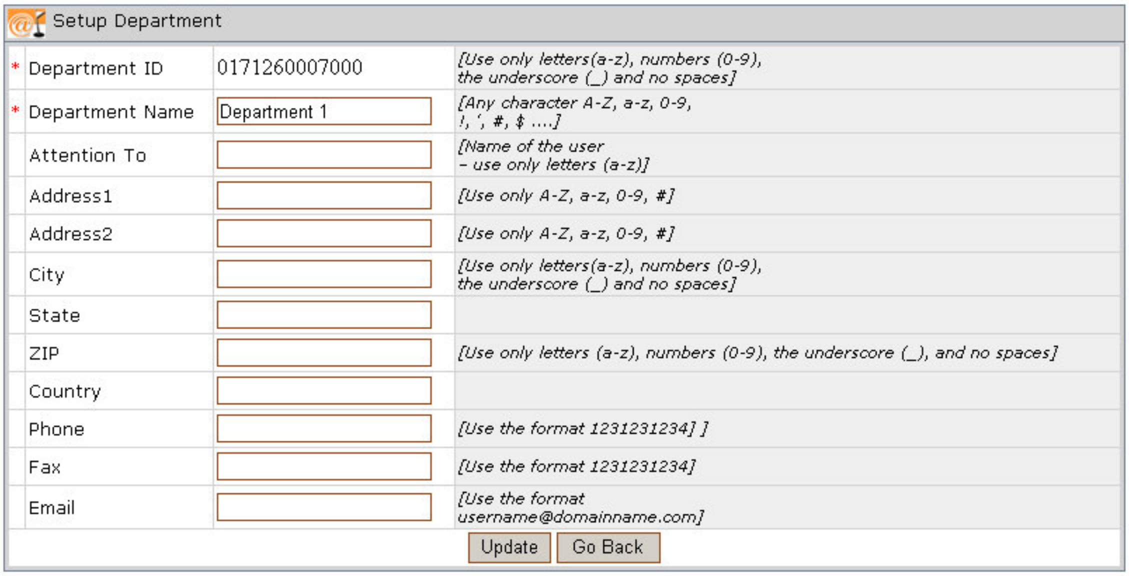


Figure 55

After edit is complete you must ***Click*** the **Update** button to save modifications or ***Click*** the **Go Back** button to return to previous screen.

To change a status of a Company, ***Click*** **InActivate** in the farthest right column.
There are two status types:

- Active
- Inactive

Setup Items

The next step in setting up **Par Management** is to create Items.

Select the **Setup Items** option from the **Cart Count** menu option and you will receive the following screen: ***Figure 56***

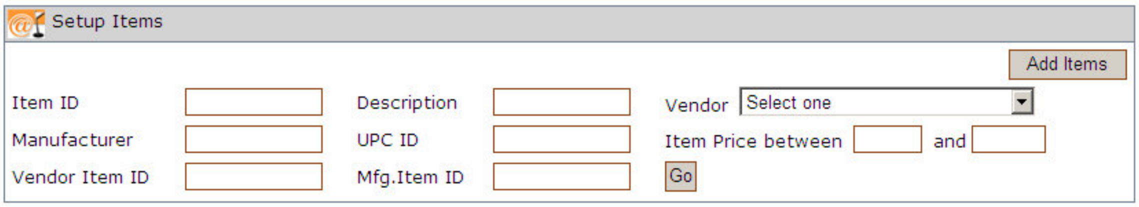


Figure 56

Searching for an existing item can be done with any of the following search parameter fields.

Item ID – Enter a unique Item ID.

Description – Enter the Item's description.

Vendor – Select a Vendor from the drop down list.

Manufacturer – Enter the Item manufacturer name.

UPC ID – Enter the Item's UPC ID.

Item Price Between and – Enter a minimum price and maximum price. (Based on Procurement cost).

Vendor Item ID – Enter the Vendor's Item ID for this Item.

Mfg. Item ID – Enter the Manufacturer's Item ID for this item.

To add a new item, ***Click*** the **Add Items** button to display: ***Figure 57***

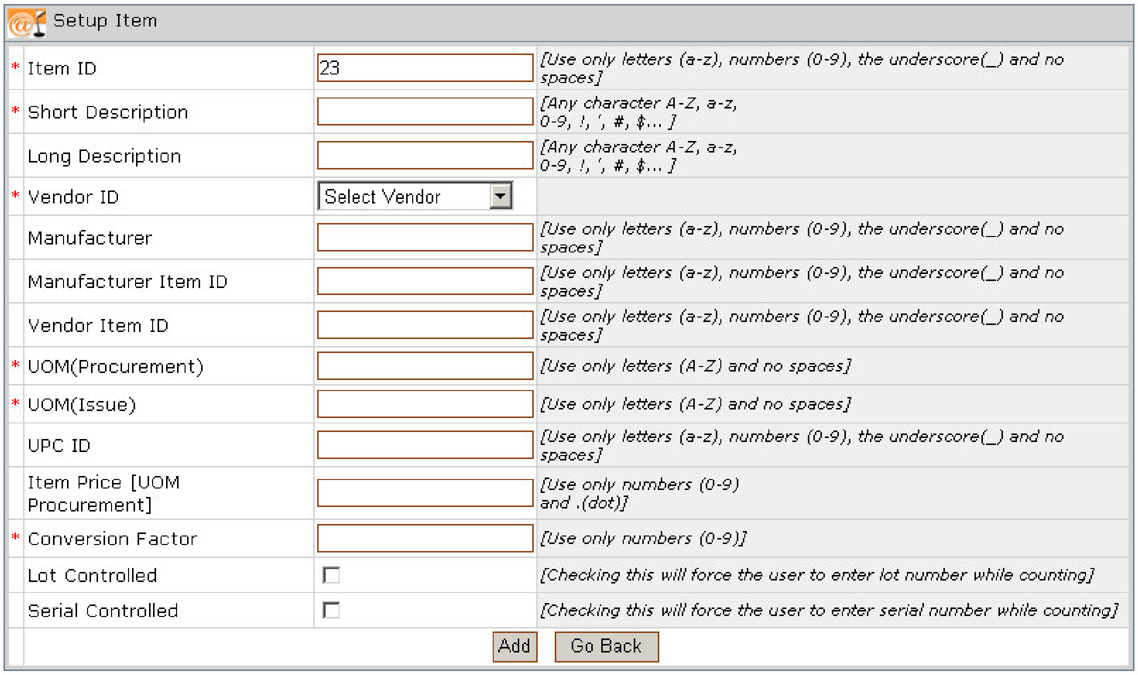


Figure 57

Item ID – Enter a unique Item ID or use the sequential AtPar Item ID.

Short Description – Enter the Item's short description.

Long Description – Enter the Item's long description.

Vendor ID – Select a Vendor from the drop down list.

Manufacturer – Enter the Item manufacturer name.

Manufacturer Item ID – Enter the Manufacturer's Item ID for this item.

Vendor Item ID – Enter the Vendor's Item ID for this Item.

UOM (Procurement) – Enter the item cost from Vendor.

UOM (Issue) – Enter item your organization charges for Issue.

UPC ID – Enter the Item's UPC ID.

Item Price – Enter the Item's price.

Conversion Factor – Used to factor cost per item. If Procurement and Issue UOMs are the same, this should be set to 1. If there are 12 Ea in a box, this should be set to 12.

Lot Controlled – Check if Lot number is required for this Item.

Serial Controlled – Check if Serial Number is required for this item.

After entering all the necessary information, ***click*** the **Add** button to save the information.

Clicking the **Go Back** button will return you to the previous screen without saving the information.

Setup Par Locations

The next step in setting up **Par Management** is to create Par Locations.

Select the **Setup Par Locations** option from the **Cart Count** menu option and you will receive the following screen: ***Figure 58***

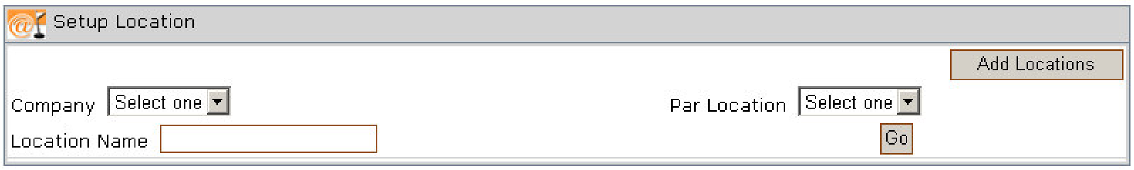


Figure 58

If you want to edit an existing Location, ***select*** the **Company** and **Par Location** from the drop down lists, and ***Click*** the **Go** button.

To add a new Par Location, ***Click*** the **Add Locations** button. You will see the following screen: ***Figure 59***

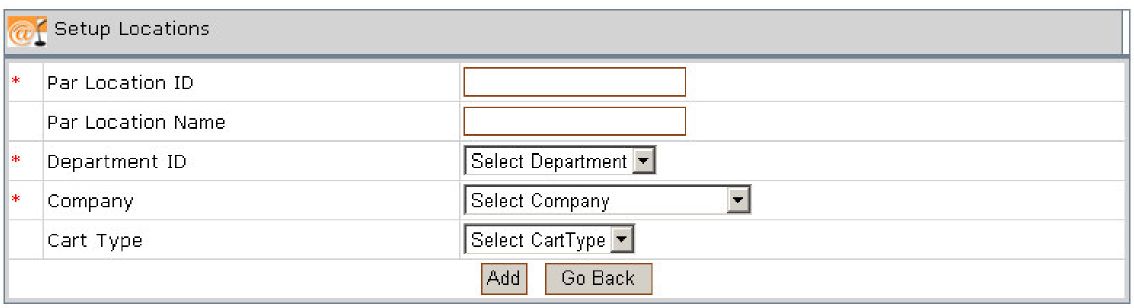


Figure 59

Mandatory fields are noted with an asterisk (*).

Par Location ID – Enter a unique Cart ID or Par Location ID.

Par Location Name – Enter the full Cart or Par Location name.

Department ID – Select the Department ID from the drop down list.

Company – Select the Company to assign this Cart or Par Location.

Cart Type – Count or Request. Select Count if your organization has the user's enter a physical item count. Select Request if your organization has the user's enter the quantity they WANT or need to order.

After entering all the necessary information, ***Click*** the **Add** button to save the information.

Clicking the **Go Back** button will return you to the previous screen without saving the information.

If you have selected the **Add** button, you will see the following screen: ***Figure 60***

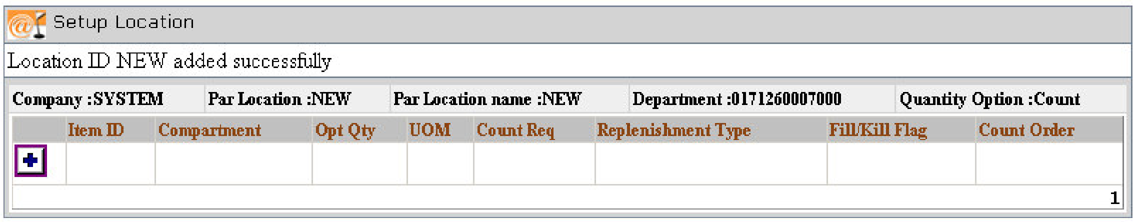


Figure 60

This screen will allow you to associate items with a Cart or Par Location. ***Click*** the **Blue Plus** icon to add a new item: ***Figure 61***

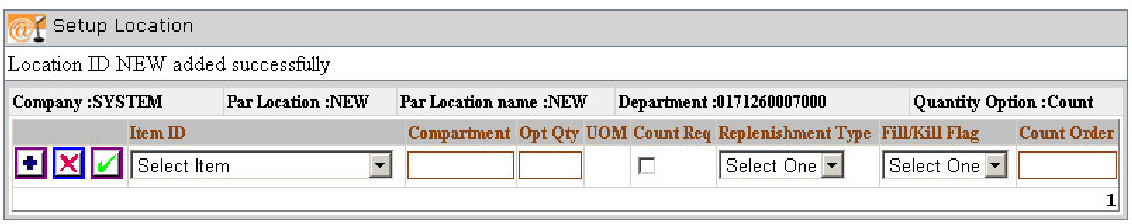


Figure 61

Select an **Item** from the drop down list.

Enter a compartment or bin.

Enter the Opt(imam) Qty or Par Qty of the item.

Check box for Count req. Default is NO.

Replenishment Type – Stock, Non-Stock, Stockless, Consignment.

Fill/Kill Flag notes whether this item is to be filled or killed.

Enter a numeric value for the order on which the item will appear on the Items Count screen of the hand held device.

Count order IS mandatory to save item on the Par Location.

To erase an item enter without saving, ***select*** the **X** icon.

To save the item and continue, ***select*** the **Checkmark** icon.

Manage Par Locations

The **Manage Par** option is used to edit or modify existing Par Locations or Carts. ***Clicking*** the **Manage Par** option from the **Cart Count** menu will provide you with the following screen: ***Figure 62***

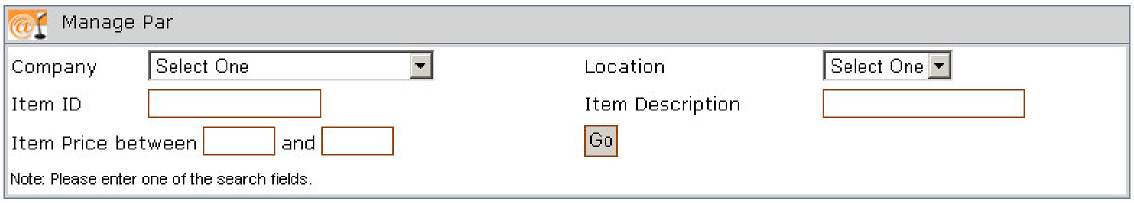


Figure 62

Search parameters that are available follow:

Company – Select Company or Business Unit from the drop down list.

Location – Select the Cart or Par Location from the drop down list.

Item ID – Enter the Item ID.

Item Description – Enter the full or partial Item description.

Item Price Between and – Enter the Item price between and values.

Click the **Go** button to initiate the search and return applicable data: ***Figure 63***

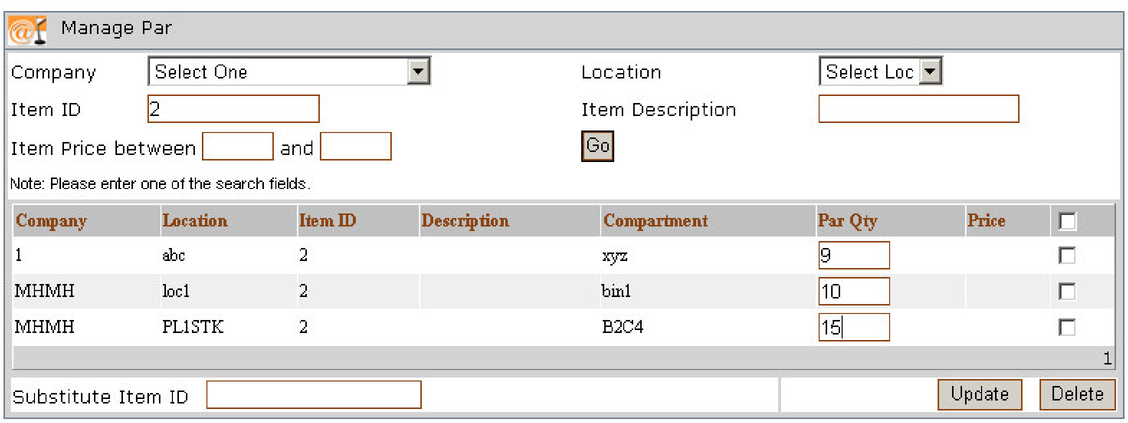


Figure 63

Fields that can be edited are Par Qty, Price, and Substitute Item ID. Once you have made changes, ***click*** the **Update** button to save changes or the **Delete** button to return to the previous screen without saving changes.

Critical Items

This option has been specifically designed for those ERP systems that don't already have this functionality. PeopleSoft has this function setup in their ERP systems, but may also be performed here in version 2.5.

This option is used to force users to count a specific item in 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.

Click on the **Critical Item** option and the following screen appears: ***Figure 67***

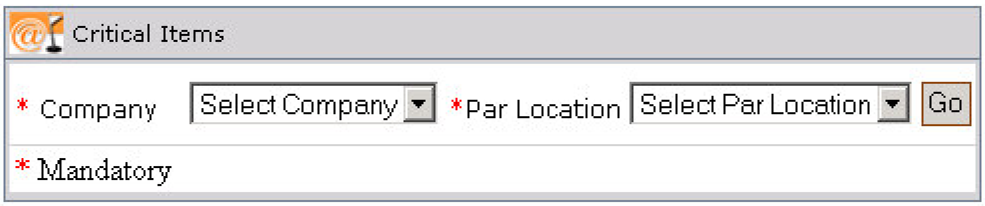


Figure 67

Select a Company (Business Unit) and Par Location (Cart ID).

Select them from the drop down options and ***Click*** the **Go** button.

You will see the screen shot below: ***Figure 68***

Critical Items

* Company MHMH *Par Location PL4ETELE Go

* Mandatory

Submit

Item ID	Description	Par Value	Item Type	Price	Critical
0004272	PAPER,MONITOR	40	Stock	0.94	☐
0008517	ELECTRODE,ADULT,FOAM,BULK,LF, 30/PK,TELE,TELEMETRY,PAD STRESS/HOLTER MEDI-TRACE MODEL 530	25	Stock	4.04	☐
0009571	SWAB,ALCOHOL,2PLY,MED	2	Stock	1.13	☐
0009696	SENSOR,OXI II,ADULT REPROCCED,PULSE OX - PURCHASE ONLY IF AVAILABLE	12	Stock	6.3	☐
0014444	BATTERY,DURACELL,9V CLINICS USE ITEM #0016927	72	Stock	0.82	☐
0024674	SENSOR,II,NASAL,OXI,,PULSE OX	5	Stock	11.7	☐
0024675	SENSOR,FOREHEAD,PULSE,OXIMETRY,PULSE OX	5	Stock	24	☐

Submit

Figure 68

You will see *Item ID*, *Description*, *Item Type*, *Price*, and *Critical* as the column headers. If you wish to select and designate an item as *Critical*, check the respective box next to that item's description, and select the **Submit** button.

<u>This will ensure that any item you have selected will have to be counted each time a user tries to count this cart/par location.</u>

User Parameters

This section allows you to set up parameters that are specific to a client user.

Click on **User Parameters** option give you: ***Figure 41***

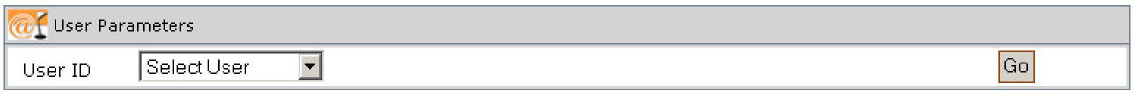
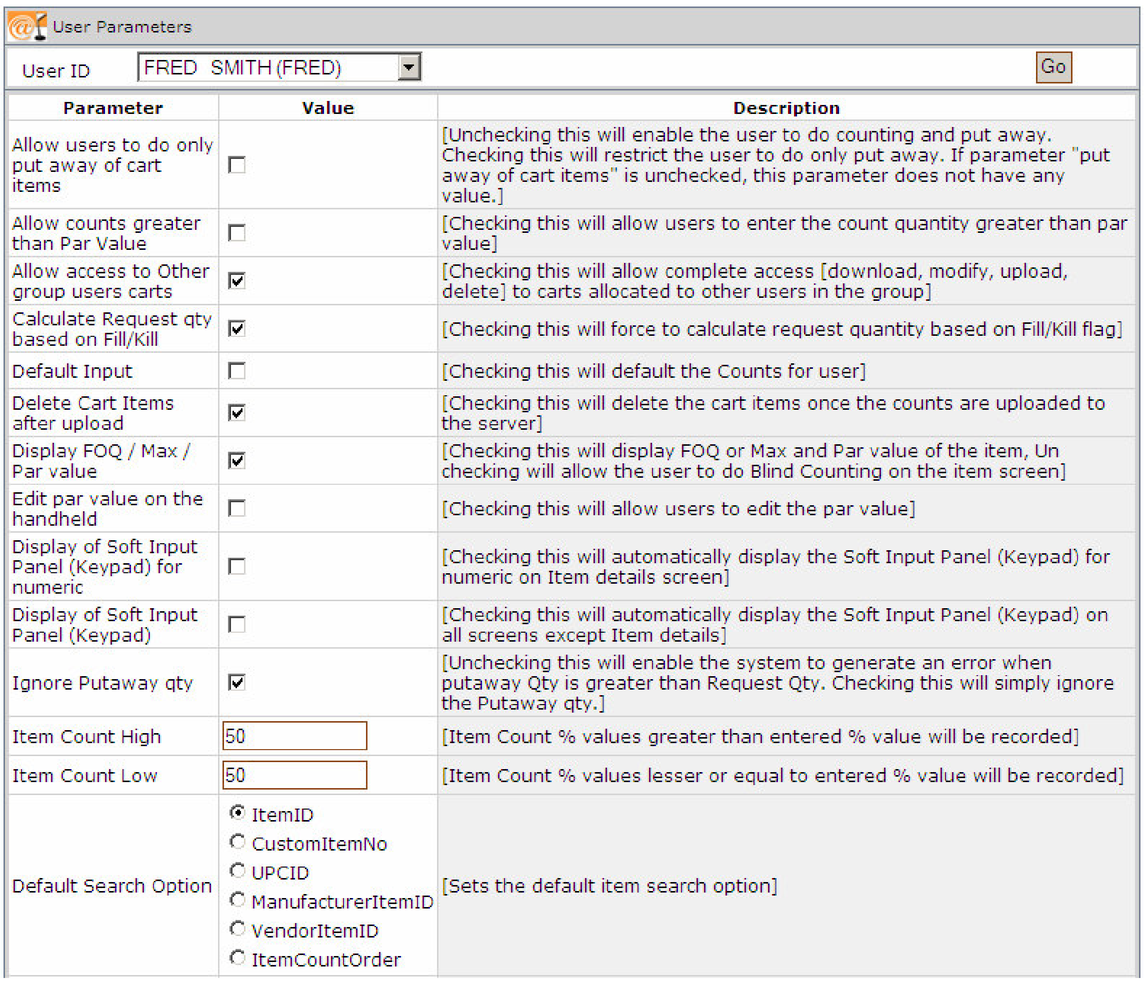


Figure 41

Using the drop down window, select a user and ***Click*** the **Go** button.

You will see the following screen: ***Figure 42***


User Parameters

User ID: FRED SMITH (FRED) — Go

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.]
Allow counts greater than Par Value	☐	[Checking this will allow users to enter the count quantity greater than par value]
Allow access to Other group users carts	☑	[Checking this will allow complete access [download, modify, upload, delete] to carts allocated to other users in the group]
Calculate Request qty based on Fill/Kill	☑	[Checking this will force to calculate request quantity based on Fill/Kill flag]
Default Input	☐	[Checking this will default the Counts for user]
Delete Cart Items after upload	☑	[Checking this will delete the cart items once the counts are uploaded to the server]
Display FOQ / Max / Par value	☑	[Checking this will display FOQ or Max and Par value of the item, Un checking will allow the user to do Blind Counting on the item screen]
Edit par value on the handheld	☐	[Checking this will allow users to edit the par value]
Display of Soft Input Panel (Keypad) for numeric	☐	[Checking this will automatically display the Soft Input Panel (Keypad) for numeric on Item details screen]
Display of Soft Input Panel (Keypad)	☐	[Checking this will automatically display the Soft Input Panel (Keypad) on all screens except Item details]
Ignore Putaway qty	☑	[Unchecking this will enable the system to generate an error when putaway Qty is greater than Request Qty. Checking this will simply ignore the Putaway qty.]
Item Count High	50	[Item Count % values greater than entered % value will be recorded]
Item Count Low	50	[Item Count % values lesser or equal to entered % value will be recorded]
Default Search Option	(•) ItemID ( ) CustomItemNo ( ) UPCID ( ) ManufacturerItemID ( ) VendorItemID ( ) ItemCountOrder	[Sets the default item search option]

Mandatory Count	☐	[Checking this will make it mandatory for user to enter Counts]
Putaway of Cart Items	☑	[Checking this will allow the users to do put away of cart items.]
Sort By Column	☑	[Checking this will allow the user to sort the columns]
Super User	☐	[Allows user to view, modify, upload, delete other users data on handheld]
Truncate leading zeros	☐	[Checking this will truncate the leading zeros of a scanned Item ID]
	Submit	

Figure 42

Allow users to do only put away of cart items –

- The **"Putaway of Cart/Par Location Items"** option later in User Parameters **MUST be *CHECKED*** for this option to work
- If this option is ***CHECKED***, user can perform PUT AWAY of Cart/Par Location Items ONLY
- If this option is ***UNCHECKED***, user can perform Cart Count and Put away functions

Allow counts greater than Par Value – Checking this allows users to enter a count quantity greater than the Par Value. Useful for situations where one needs to overstock items.

Allow access to Other group users cart – Checking this allows the user to access other users allocated carts/par locations. For example, if checked, this user will have the ability to login to the hand held and then download either their allocated carts/par locations or those of another user. This is different than the Super User. The Super User can see downloaded carts/par locations but may NOT download for anyone other than his own carts.

Calculate Request qty based on Fill/Kill – Check this to calculate quantity based on the Fill or Kill flag setting.

Allow putaway of items without counting them – Checking this will allow the user to download ALL allocated carts/par locations for putaway without counting them first.

Default Input – Checking this option will automatically default a zero count in the count quantity field or the hand held device if the Qty Option is Count Quantity. If the Qty Option is Request Quantity, when this item is selected, the Quantity will default with the Par Value.

Delete Cart Items after Upload – Used in the client to delete item data after a Cart/par location is sent to the server. Keeping it unchecked will clear the count Information but keep the items so that they do not need to be re-downloaded. **However, the items WILL need to be recounted.**

Display FOQ/Max/Par Value – Checking this option allows users to view FOQ or Max values as defined in the ERP setup, on the client device.

Edit par value on the hand held – Checking this allows the user to edit par values from the hand held device AND allows server users to edit recommended par values on the Optimization Report.

Display of Soft Input Panel (Keypad) for numeric – Displays a numeric only keypad for entering counts. User will also be able to manually move to next and previous records.

Display of Soft Input Panel (Keypad) – The keyboard display will automatically appear when user moves to an edit field. Unchecked will disable the keyboard from automatically displaying, but will be available in manual mode.

Ignore Putaway qty – Leaving this option unchecked, will generate an error when Putaway quantity is greater than Requested quantity. Checking this option will ignore any error messages and allow processing to continue.

Ignore requisition release errors – LAWSON ERP ONLY! Checking this will ignore requisition release errors and allow for upload of non errors.

Item Count Low – and **Item Count High –** These parameters are used in the Cart Exception Report to denote threshold values below and above whose limit, item counts are recorded and displayed. These are useful to perform trend analysis to identify items which are typically below or above Par Limits. This is an effective tool to tweak Par Values over time.

NOTE: To capture all Item detail information, set both Item Count Low and Item Count High fields to 50.

Default Search Option – This option defaults the search functionality on the clients item screen. In other words, this will provide the box or option in which the user can search on the screen.

Mandatory Count – If checked, this will force a user to count all items on a cart/par location**.**

Putaway of Cart Items – Checking this will allow user to putaway cart/par location items.

Sort by Column – Checking this will allow the user to sort within the columns of the hand held device. For example, if the first column on the Item Count screen is Item Id, and you have checked this box, this user will be able to order or sort the column.

Super User – If checked, the selected user will be able to view the records of all users on a given client device. This can be used in a situation where a user leaves for the day without uploading carts/par locations, and his or her supervisor can log in at a later time and upload the unsent carts/par locations, on **THAT** hand held device.

Truncate Leading Zeros – Check this if you want the leading zeros of an item truncated when scanned.

Allocate Carts

This option is used by the Server user to set up each Client user and their respective carts.

Clicking on **Allocate Carts** option gives us the following screen: ***Figure 43***

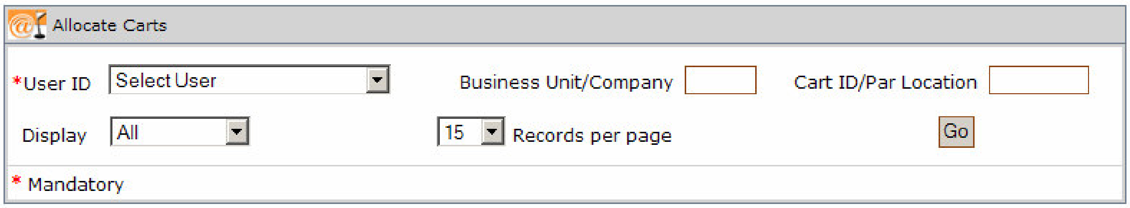


Figure 43

First, you must ***Select*** a **UserID**. You can leave **Business unit/Company** and **Cart ID/Par Location** blank.

If you want to view and assign **ONLY** those carts that aren't allocated, under the display option select **Unallocated.** If this is a user that has carts/par locations already assigned and you wish to change the current carts/par locations assigned to this user, select the **Allocated** option under the display option.

Leaving the Display set to the default of **ALL** means that all carts/par locations, both allocated and unallocated will display.

For this example, we will select **Unallocated.**

We recommend leaving the **Records per page** at 10 until you see how your PC handles the screen.

Click the **Go** button and you now have the following screen: ***Figure 44***

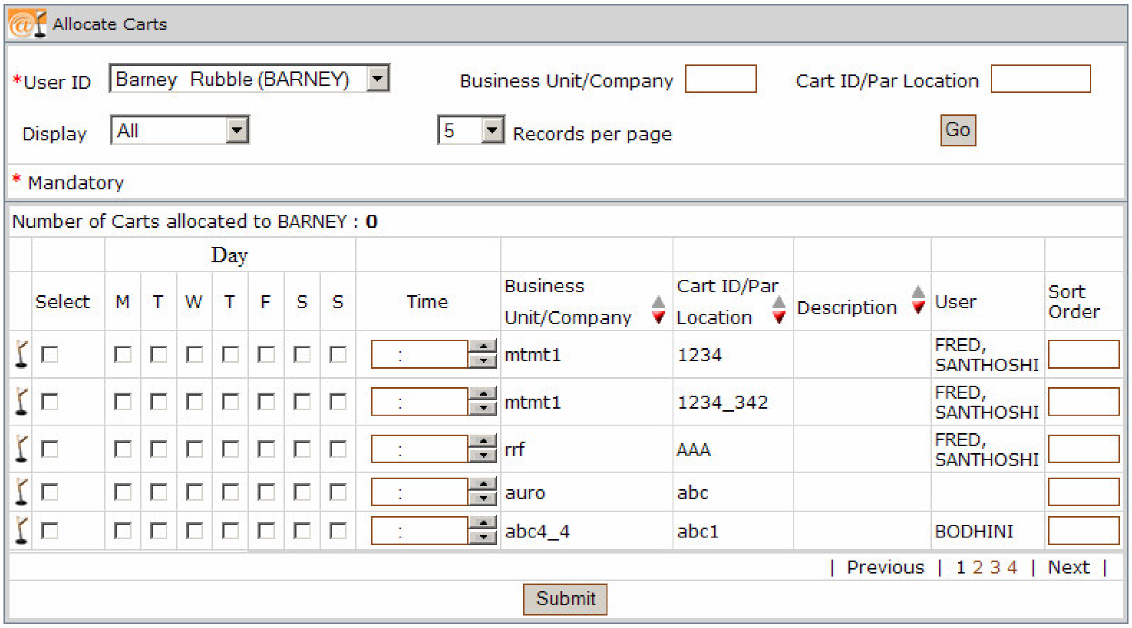


Figure 44

First take note that since we have limited our selection to display only 10 records per page, in the bottom right hand corner of the screen you see | Previous | 1 | Next. This simply means that there are more carts on those pages. To navigate to those, you can simply click on any of the highlighted areas and the system will take you there immediately.

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

Clicking on the **Select** check box will place a check mark in this box AND **all** days:
Figure 45

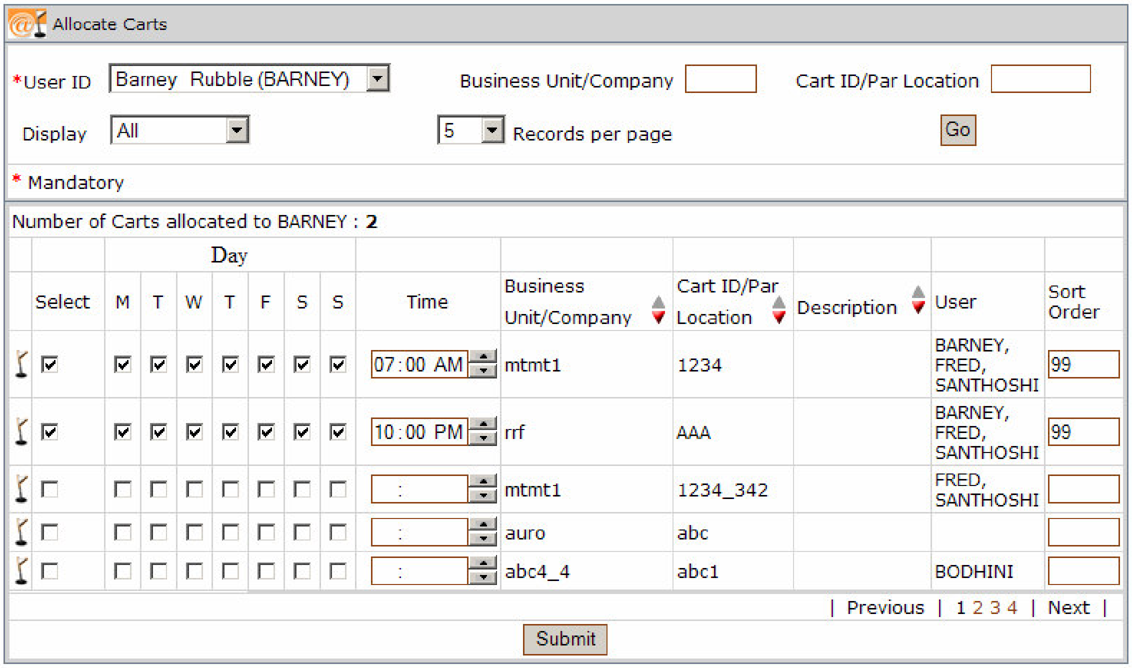


Figure 45

If there are carts/par locations that need to be counted daily, you will want to check all check boxes. This is just a quicker way to do that.

If you see carts/par locations that you don't want this user to be responsible to count, simply leave that cart unchecked.

The time column should be completed if you want to track when carts/par locations are counted, using the **Schedule Compliance Report** found later in this document.

Enter the time the cart/par location should be counted. The **Schedule Compliance** report will capture the time the cart/par location has been counted and report deviation from the time the cart/parlocation is scheduled to be counted.

To save ***Click*** on the **Submit** button. This will return you to the **Allocate Cart**s screen.

This time, since we know a user has some carts/par locations allocated already, let's select the display option of **Allocated**.

Now the **Allocate Carts** screen should look just like the screen on the next page:
Figure 46

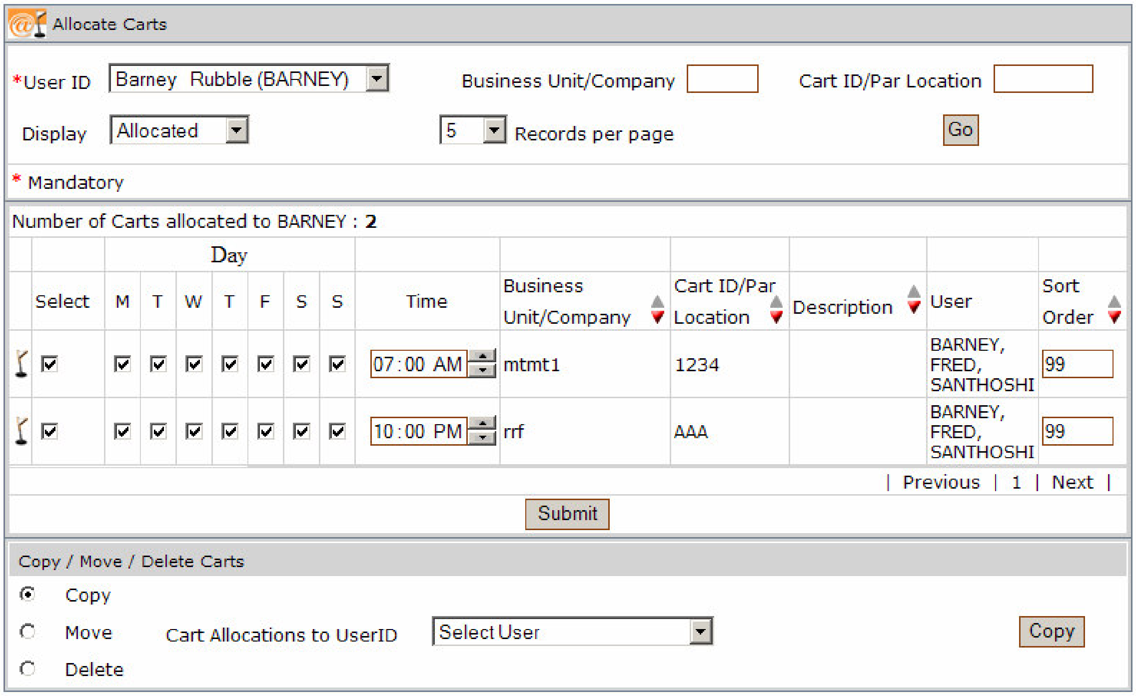


Figure 46

You will see that the last two columns on this screen have changed from BLANK. In the User column, you see the user that has the Carts/Par Locations already allocated.

Note that the Sort Order column now has all numerals in it. The usefulness of the Sort Order is that the administrator can determine the display order for counting carts on the hand held device. If filled in with other than unique numbers, 99 will appear in each. This means the sort order of the CartIDs/Par Locations will download in an order determined on the ERP system.

You will see a red triangle on the top of the Business Unit/Company, CartID/Par Location, Description and Sort Order columns. You may use this to sort the respective column in Ascending or Descending order.

The other items to note on this screen are at the bottom of the screen. You will see **Copy, Move,** and **Delete** buttons. These are set up for the Functional Manager to be able to **Allocate** like schedules for Users.

To copy the user's Allocation to another user, ***Check*** **COPY**. ***Highlight*** the **UserID** from the drop down window and ***Click*** the **Copy** Button to the right of screen.

The MOVE and DELETE functions work in the exact same way.

*****NOTE: In order for the Copy, Move, Delete functions to appear, you MUST select ALLOCATED from the Display Drop down option and the Business Unit/Company and CartID/Par Location should be blank.**

Manage Orders

Once Par Locations have been counted and sent from the hand held device, the Manager Orders option will be used to manage the records.

Click on the **Manager Orders** menu option: ***Figure 64***

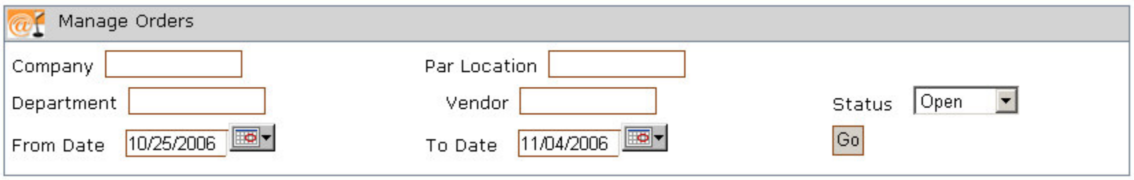
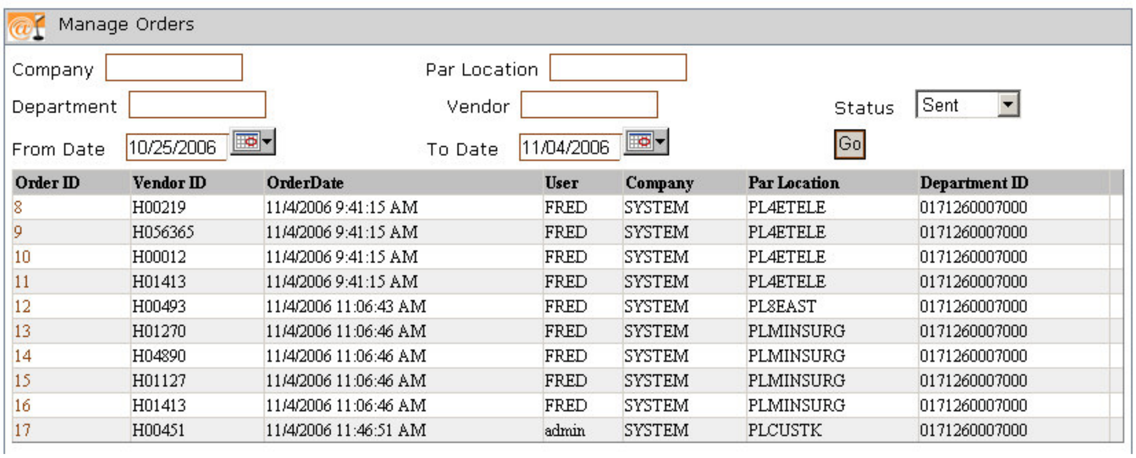


Figure 64

Statuses – Open (pending), Sent (sent from hand held device to server), Receive (Items on order have been putaway on Par Location), Cancel (Order ID was canceled): ***Figure 65***

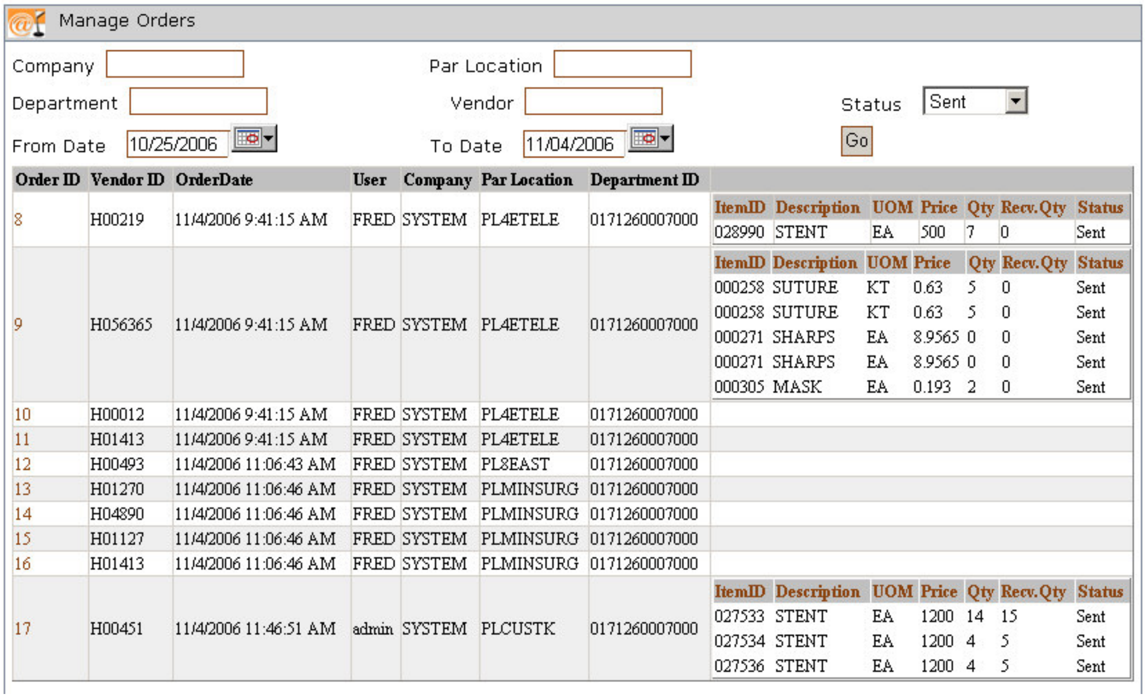


Order ID	Vendor ID	OrderDate	User	Company	Par Location	Department ID
8	H00219	11/4/2006 9:41:15 AM	FRED	SYSTEM	PL4ETELE	0171260007000
9	H056365	11/4/2006 9:41:15 AM	FRED	SYSTEM	PL4ETELE	0171260007000
10	H00012	11/4/2006 9:41:15 AM	FRED	SYSTEM	PL4ETELE	0171260007000
11	H01413	11/4/2006 9:41:15 AM	FRED	SYSTEM	PL4ETELE	0171260007000
12	H00493	11/4/2006 11:06:43 AM	FRED	SYSTEM	PL8EAST	0171260007000
13	H01270	11/4/2006 11:06:46 AM	FRED	SYSTEM	PLMINSURG	0171260007000
14	H04890	11/4/2006 11:06:46 AM	FRED	SYSTEM	PLMINSURG	0171260007000
15	H01127	11/4/2006 11:06:46 AM	FRED	SYSTEM	PLMINSURG	0171260007000
16	H01413	11/4/2006 11:06:46 AM	FRED	SYSTEM	PLMINSURG	0171260007000
17	H00451	11/4/2006 11:46:51 AM	admin	SYSTEM	PLCUSTK	0171260007000

Figure 65

The orders are assigned an Order ID based on Vendor, Company, Par Location and Department ID.

Click on an **order id** for details: ***Figure 66***



Manage Orders

Company | Par Location

Department | Vendor | Status: Sent

From Date: 10/25/2006 | To Date: 11/04/2006 | Go

Order ID	Vendor ID	OrderDate	User	Company	Par Location	Department ID
8	H00219	11/4/2006 9:41:15 AM	FRED	SYSTEM	PL4ETELE	0171260007000
9	H056365	11/4/2006 9:41:15 AM	FRED	SYSTEM	PL4ETELE	0171260007000
10	H00012	11/4/2006 9:41:15 AM	FRED	SYSTEM	PL4ETELE	0171260007000
11	H01413	11/4/2006 9:41:15 AM	FRED	SYSTEM	PL4ETELE	0171260007000
12	H00493	11/4/2006 11:06:43 AM	FRED	SYSTEM	PL8EAST	0171260007000
13	H01270	11/4/2006 11:06:46 AM	FRED	SYSTEM	PLMINSURG	0171260007000
14	H04890	11/4/2006 11:06:46 AM	FRED	SYSTEM	PLMINSURG	0171260007000
15	H01127	11/4/2006 11:06:46 AM	FRED	SYSTEM	PLMINSURG	0171260007000
16	H01413	11/4/2006 11:06:46 AM	FRED	SYSTEM	PLMINSURG	0171260007000
17	H00451	11/4/2006 11:46:51 AM	admin	SYSTEM	PLCUSTK	0171260007000

ItemID	Description	UOM	Price	Qty	Recv.Qty	Status
028990	STENT	EA	500	7	0	Sent

ItemID	Description	UOM	Price	Qty	Recv.Qty	Status
000258	SUTURE	KT	0.63	5	0	Sent
000258	SUTURE	KT	0.63	5	0	Sent
000271	SHARPS	EA	8.9565	0	0	Sent
000271	SHARPS	EA	8.9565	0	0	Sent
000305	MASK	EA	0.193	2	0	Sent

ItemID	Description	UOM	Price	Qty	Recv.Qty	Status
027533	STENT	EA	1200	14	15	Sent
027534	STENT	EA	1200	4	5	Sent
027536	STENT	EA	1200	4	5	Sent

Figure 66

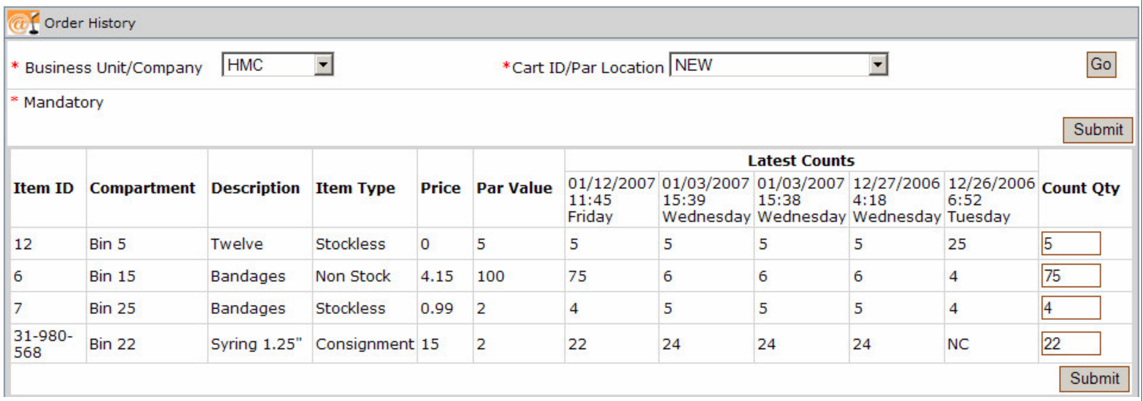
This will provide the user with detailed information of Items sent on an Order.

Order History Report

This report will provide the user with a history of a Par Location transaction.

This also allows the Server User the ability to “resend” and edit counts for upload to the ERP system.

This is useful if hand held devices are out of commission or to simply resend the same counts: ***Figure 88***



Item ID	Compartment	Description	Item Type	Price	Par Value	Latest Counts 01/12/2007 11:45 Friday	01/03/2007 15:39 Wednesday	01/03/2007 15:38 Wednesday	12/27/2006 4:18 Wednesday	12/26/2006 6:52 Tuesday	Count Qty
12	Bin 5	Twelve	Stockless	0	5	5	5	5	5	25	5
6	Bin 15	Bandages	Non Stock	4.15	100	75	6	6	6	4	75
7	Bin 25	Bandages	Stockless	0.99	2	4	5	5	5	4	4
31-980-568	Bin 22	Syring 1.25"	Consignment	15	2	22	24	24	24	NC	22

Figure 88

The last 5 counts of this CartID will appear on the screen. It will allow the Server user the ability to edit the **Count Qty** and send the CartID by ***clicking*** the **Submit** button.

Item ID – Item number.

Compartment – Compartment number of the item.

Description – Item description.

Item Type – Stock or Non-Stock.

Price – Item Price.

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

Latest Counts – Date and time of the latest count.

Count Qty – Only editable filed on this, allows user to enter or edit counts. **NC = Not Counted.**

Schedule Compliance Report

When you set up Cart Allocation for Cart/Par Locations, with time values entered, this report can be used.

The report is designed for Server Users (Functional Manager or Supervisors) to view whether the Carts/Par Locations are being counted when designated.

Click on the **Par Audit Report** option from the **Cart Count** menu and you will see the following screen: ***Figure 79***

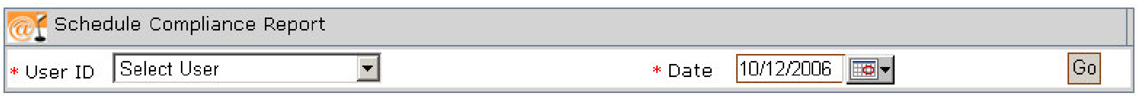
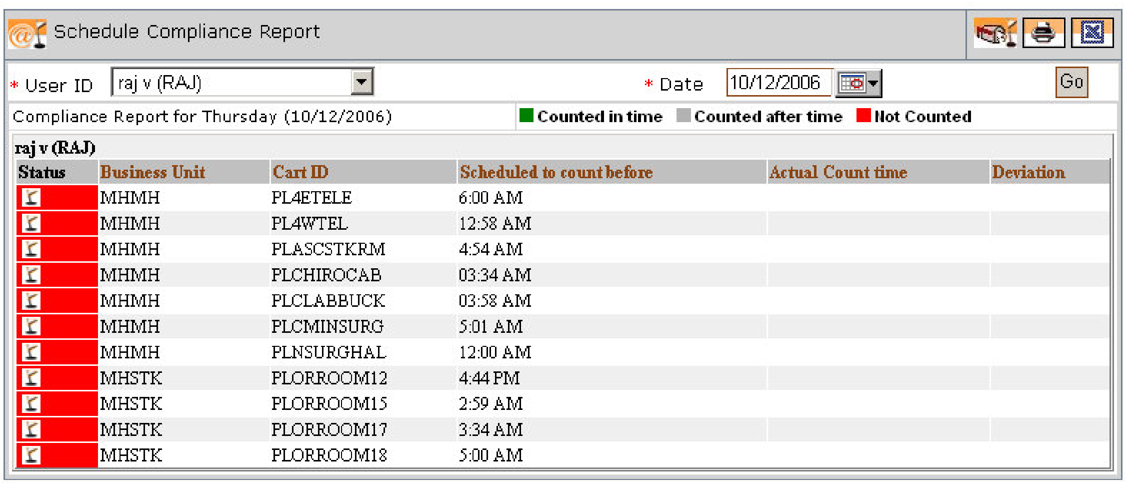


Figure 79

Select a **User ID** from the drop down list and also a Date.

Click the **Go** button to return data: ***Figure 80***



Status	Business Unit	Cart ID	Scheduled to count before	Actual Count time	Deviation
	MHMH	PL4ETELE	6:00 AM		
	MHMH	PL4WTEL	12:58 AM		
	MHMH	PLASCSTKRM	4:54 AM		
	MHMH	PLCHIROCAB	03:34 AM		
	MHMH	PLCLABBUCK	03:58 AM		
	MHMH	PLCMINSURG	5:01 AM		
	MHMH	PLNSURGHAL	12:00 AM		
	MHSTK	PLORROOM12	4:44 PM		
	MHSTK	PLORROOM15	2:59 AM		
	MHSTK	PLORROOM17	3:34 AM		
	MHSTK	PLORROOM18	5:00 AM		

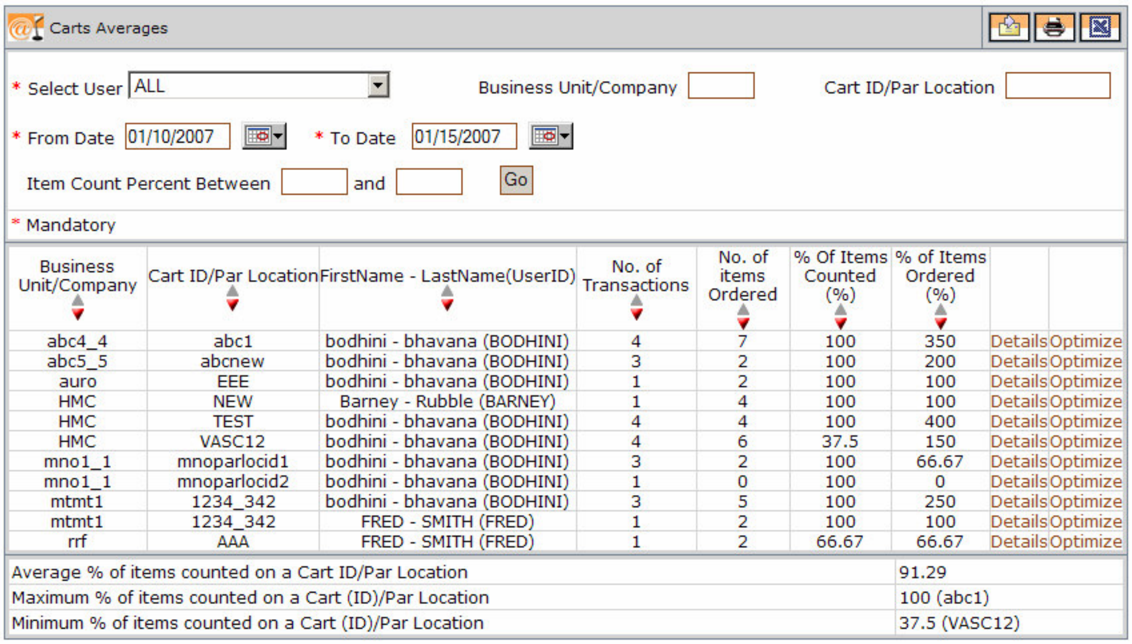
Figure 80

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, the **Actual Count time** will be displayed and any difference from the **Scheduled to count before time** will be listed in the **Deviation** column. The status color for carts counted will be **Green**.

Cart Averages Report

This report displays count characteristics for a user or all users over a specified date range. The first screen you get is: ***Figure 74***



Business Unit/Company	Cart ID/Par Location	FirstName - LastName(UserID)	No. of Transactions	No. of items Ordered	% Of Items Counted (%)	% of Items Ordered (%)		
abc4_4	abc1	bodhini - bhavana (BODHINI)	4	7	100	350	Details	Optimize
abc5_5	abcnew	bodhini - bhavana (BODHINI)	3	2	100	200	Details	Optimize
auro	EEE	bodhini - bhavana (BODHINI)	1	2	100	100	Details	Optimize
HMC	NEW	Barney - Rubble (BARNEY)	1	4	100	100	Details	Optimize
HMC	TEST	bodhini - bhavana (BODHINI)	4	4	100	400	Details	Optimize
HMC	VASC12	bodhini - bhavana (BODHINI)	4	6	37.5	150	Details	Optimize
mno1_1	mnoparlocid1	bodhini - bhavana (BODHINI)	3	2	100	66.67	Details	Optimize
mno1_1	mnoparlocid2	bodhini - bhavana (BODHINI)	1	0	100	0	Details	Optimize
mtmt1	1234_342	bodhini - bhavana (BODHINI)	3	5	100	250	Details	Optimize
mtmt1	1234_342	FRED - SMITH (FRED)	1	2	100	100	Details	Optimize
rrf	AAA	FRED - SMITH (FRED)	1	2	66.67	66.67	Details	Optimize

Average % of items counted on a Cart ID/Par Location	91.29
Maximum % of items counted on a Cart (ID)/Par Location	100 (abc1)
Minimum % of items counted on a Cart (ID)/Par Location	37.5 (VASC12)

Figure 74

You should specify values in the 'Item Count Percent Between'. It will 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 - Business Unit or Company

Cart ID - Cart ID or Par Location

Number of Transactions - Number of times that cart/par location has been transacted over the specified period of time.

Percentage of Items Counted - Percent of items in the cart/par location that have been counted.

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

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

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

Cart Detail Report

This report shows count statistics for a given cart/par location over a specific date range. After selecting this report from the menu you will get the following screen: ***Figure 75***

Date	User ID	Total Items	No of Items counted	No of Items ordered	Count Time (Hrs: Mins.)	Percentage Counted(%)	Percentage Ordered(%)
01/12/2007	BARNEY	4	4	4	0:0	100	100

Figure 75

You **must** select a Business unit/Company, CartID/Par Location and From and To Dates.

The items you see on this report are:

Total items - Total number of items in the cart/par location.

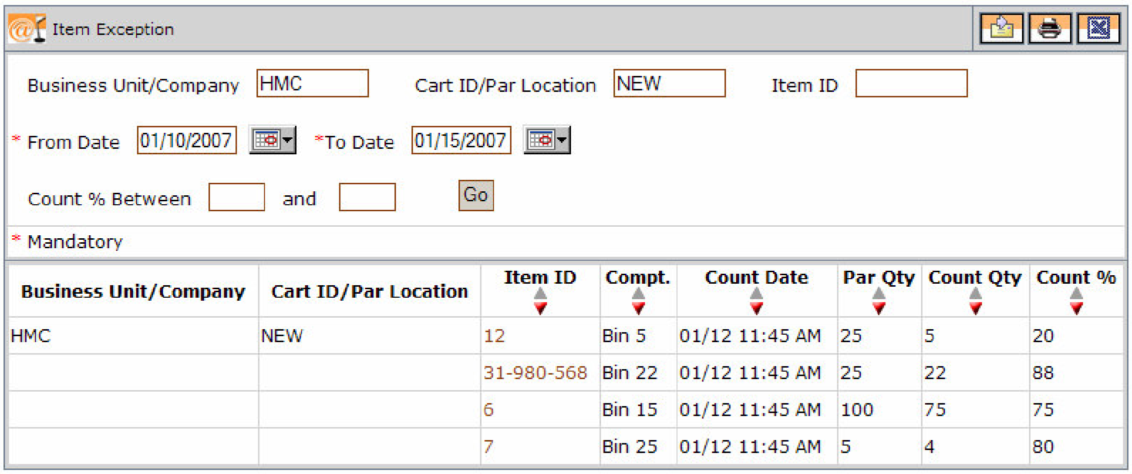
No. of items counted - Number of items in the cart/par location that were counted.

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

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

Item Exception Report

This report details item exception statistics: ***Figure 76***



Item Exception

Business Unit/Company HMC Cart ID/Par Location NEW Item ID

* From Date 01/10/2007 *To Date 01/15/2007

Count % Between and Go

* Mandatory

Business Unit/Company	Cart ID/Par Location	Item ID	Compt.	Count Date	Par Qty	Count Qty	Count %
HMC	NEW	12	Bin 5	01/12 11:45 AM	25	5	20
		31-980-568	Bin 22	01/12 11:45 AM	25	22	88
		6	Bin 15	01/12 11:45 AM	100	75	75
		7	Bin 25	01/12 11:45 AM	5	4	80

Figure 76

Business Unit/Company – Business Unit or Company

Cart ID/Par Location - Cart ID or Par Location

Item ID – Item ID (***Click*** on a specific ItemID to view to its Usage Report).

Compt – Lists the Compartment 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.

Count Qty – The actual count that the user entered for an item.

Count % - Percentile value of Count vs. Par Quantity.

Item Usage Report

This report details usage statistics of counts for a given Item across all the carts/par locations it is present in. Below is the header information: ***Figure 77***

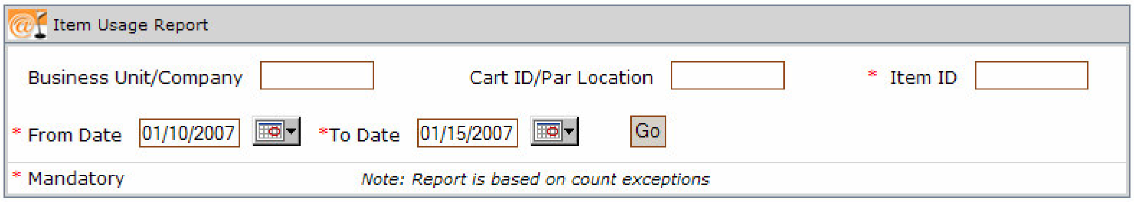


Figure 77

Clicking on **Go** button will provide you with a Graph indicating Par vs. Used Quantity across time: ***Figure 78***

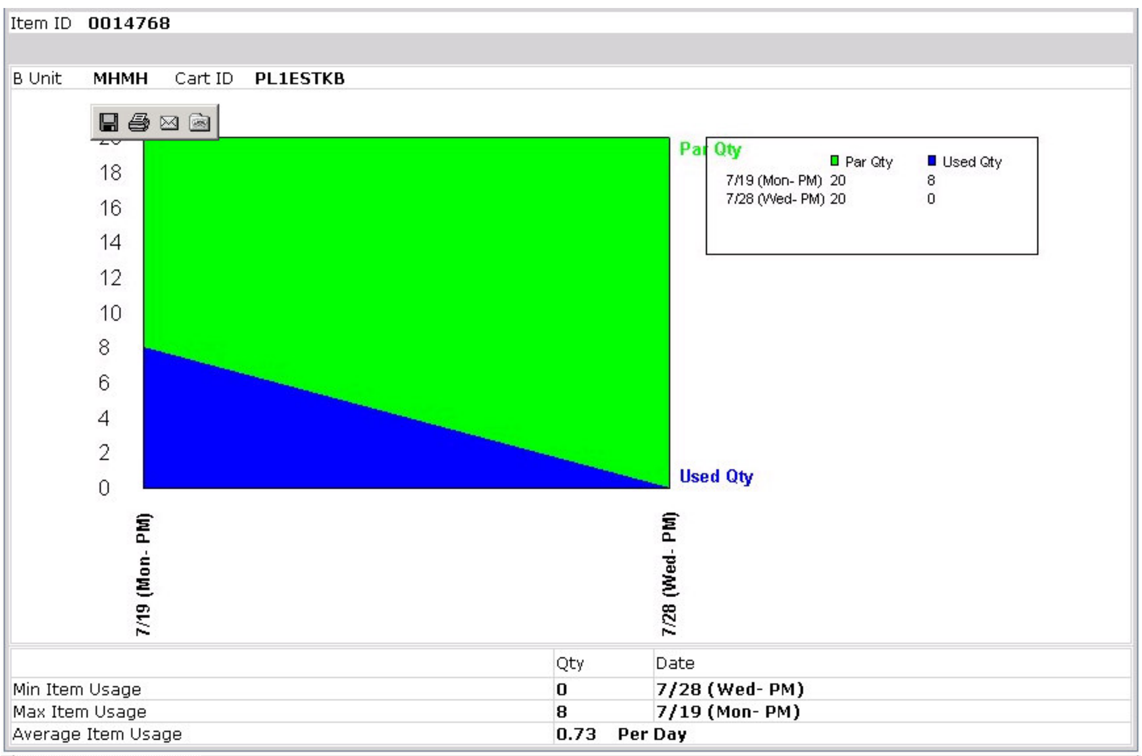


Figure 78

Optimization Report

The Optimization Report is used by managers to review a Cart/Par location's or Department's usage. The server user **MUST** enter either a Dept Id or Cart ID/Par Location, and Date Range.

Click on the **Optimization Report** option from the **Cart Count** menu and you will see the following screen: ***Figure 86***

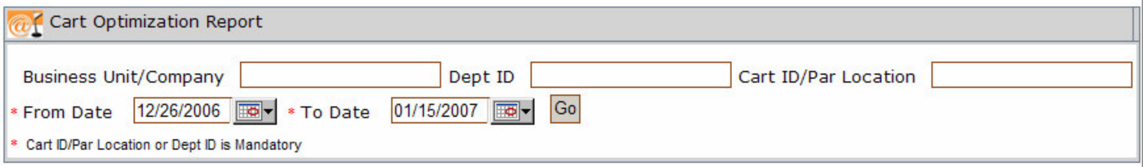
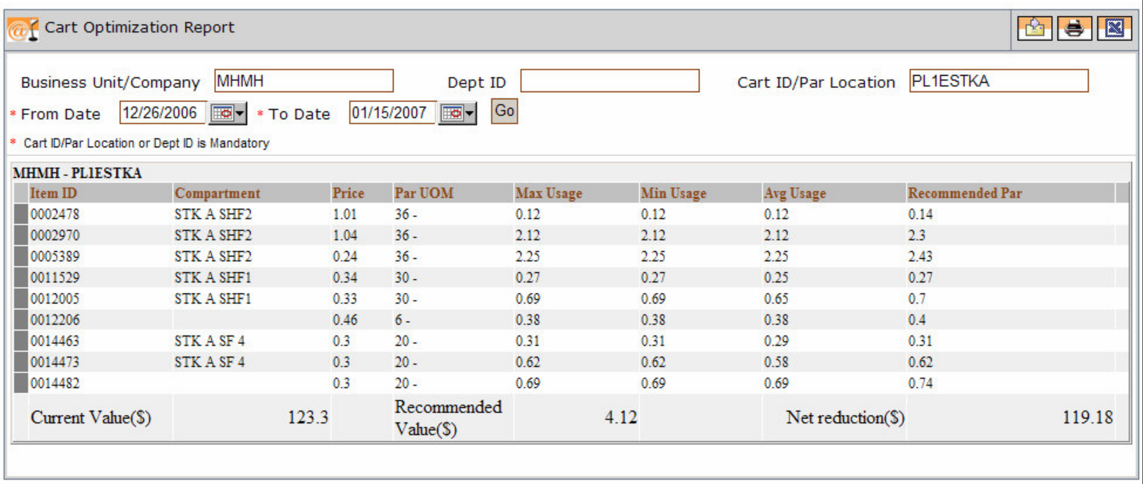


Figure 86

The server user **MUST** enter either a Dept Id or Cart ID/Par Location, and Date Range.

Click* Go** to display the following screen: ***Figure 87



MHMH - PL1ESTKA

Item ID	Compartment	Price	Par UOM	Max Usage	Min Usage	Avg Usage	Recommended Par
0002478	STK A SHF2	1.01	36 -	0.12	0.12	0.12	0.14
0002970	STK A SHF2	1.04	36 -	2.12	2.12	2.12	2.3
0005389	STK A SHF2	0.24	36 -	2.25	2.25	2.25	2.43
0011529	STK A SHF1	0.34	30 -	0.27	0.27	0.25	0.27
0012005	STK A SHF1	0.33	30 -	0.69	0.69	0.65	0.7
0012206		0.46	6 -	0.38	0.38	0.38	0.4
0014463	STK A SF 4	0.3	20 -	0.31	0.31	0.29	0.31
0014473	STK A SF 4	0.3	20 -	0.62	0.62	0.58	0.62
0014482		0.3	20 -	0.69	0.69	0.69	0.74

Current Value($)	123.3	Recommended Value($)	4.12	Net reduction($)	119.18

Figure 87

The manager or server user will now see the information in ***Figure 87***. The system will report Price, Par Unit of Measure, Maximum Usage, Minimum Usage, Average Usage, and finally, the Recommended Par for the Item.

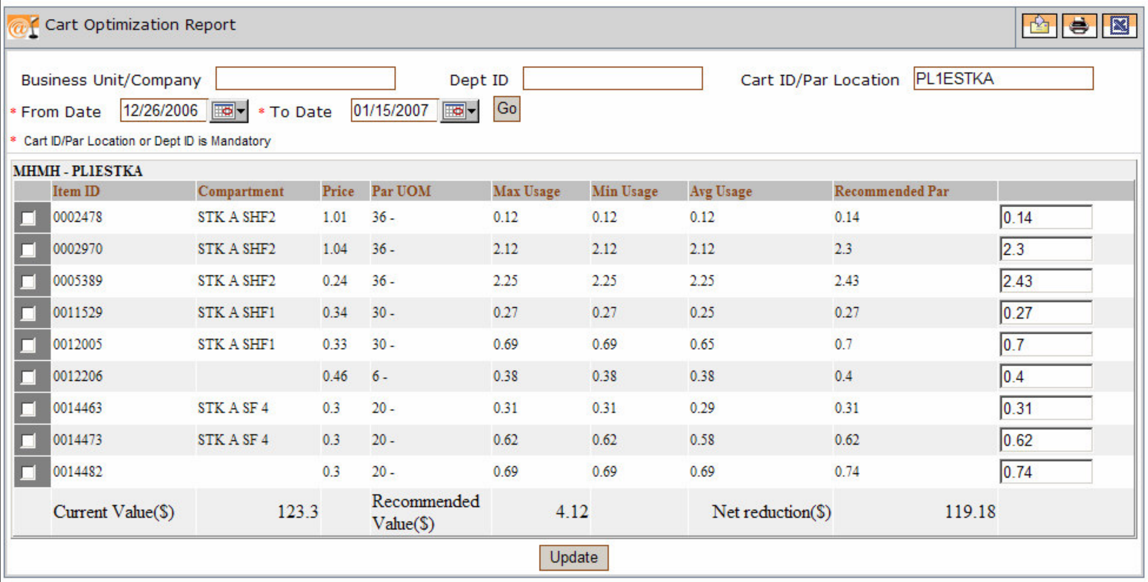
This report calculates the information slightly different than other **@Par** reports. It will search the From and To Dates for counts on this Cart ID/Par Location.

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 determine the information.

In Figure 87, you will note that this is a report. In other words, there is no editing available to the server user. However, you may wish to have the server user that runs the report, also have the ability to EDIT the Par Level.

In User Parameters, select the parameter “Edit Par Value on the hand held” for this server user.

Once you set this parameter, rerun the report and you will see the following screen, ***Figure 87a***.



Item ID	Compartment	Price	Par UOM	Max Usage	Min Usage	Avg Usage	Recommended Par	
0002478	STK A SHF2	1.01	36 -	0.12	0.12	0.12	0.14	0.14
0002970	STK A SHF2	1.04	36 -	2.12	2.12	2.12	2.3	2.3
0005389	STK A SHF2	0.24	36 -	2.25	2.25	2.25	2.43	2.43
0011529	STK A SHF1	0.34	30 -	0.27	0.27	0.25	0.27	0.27
0012005	STK A SHF1	0.33	30 -	0.69	0.69	0.65	0.7	0.7
0012206		0.46	6 -	0.38	0.38	0.38	0.4	0.4
0014463	STK A SF 4	0.3	20 -	0.31	0.31	0.29	0.31	0.31
0014473	STK A SF 4	0.3	20 -	0.62	0.62	0.58	0.62	0.62
0014482		0.3	20 -	0.69	0.69	0.69	0.74	0.74
Current Value($)	123.3		Recommended Value($)	4.12		Net reduction($)	119.18	

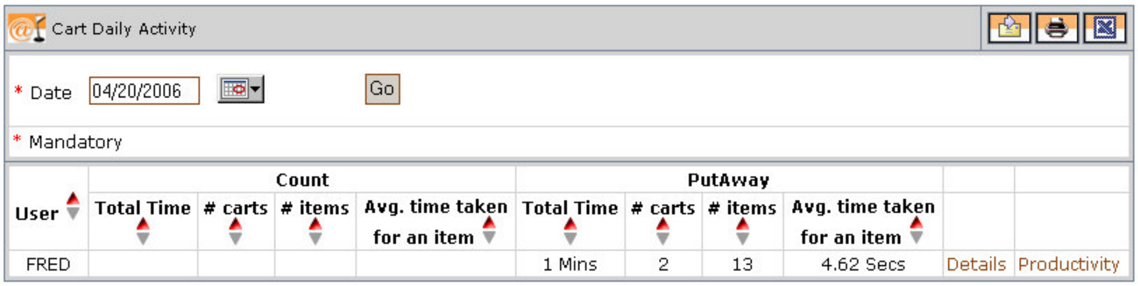
Figure 87a

To modify the par level of an item, the user will click on the check box to the left of the item, then enter the new par level in the respective edit field at the end of the line.

When you are finished entering all updates, ***click*** the **Update** button.

Daily Activity Report

The daily activity report allows viewing count and putaway performance on a given day: ***Figure 81***


Cart Daily Activity

* Date 04/20/2006 Go

* Mandatory

User	Count				PutAway					
	Total Time	# carts	# items	Avg. time taken for an item	Total Time	# carts	# items	Avg. time taken for an item		
FRED					1 Mins	2	13	4.62 Secs	Details	Productivity

Figure 81

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

Total Time – Recorded in minutes, the number of minutes this user took to count the cart/par location items.

 # carts – Number of carts/par locations counted.

 # items – Number of items that were counted.

Average time taken for a cart – Average time taken to count a cart/par location.

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

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

 # carts – Number of carts/par locations putaway.

 # items – Number of items that were putaway.

Average time taken – Average time taken to putaway items of a cart/par location.

You will see two highlighted columns at the end, *Details and Productivity.*

Clicking on the **Details Tab** will give you the screen on the next page: ***Figure 82***

Cart Daily User Activity

* UserId latha p (LATHA) *Date 12/27/2005 Go

* Mandatory

Number of transacted Carts: 2 Status Legend Download Sent Error 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	B Unit	Cart Id	Download	Sent	Start	End	Count/PutAway Time (Hrs: Mins.)	Downloaded	Counted / PutAway	Scanned	% of Items Counted / PutAway
	MHMH	PL4ETELE	12/22 12:45 PM	09:52 AM	09:51 AM	09:51 AM	0:0	7	4	0	57.14
	MHMH	PL1ESTKB	12/22 12:59 PM	09:55 AM	09:52 AM	09:54 AM	0:2	1	1	0	100

Total Count time	0 hrs :00 mins	Total Putaway time	0 hrs :02 mins
Average Time taken for a cart	0 hrs :00 mins	Average Time taken to Putaway in a cart	0 hrs :01 mins
Total Items Counted	4	Total Items Putaway	1
Average Time taken for Items Counted	0.00 Secs	Average Time taken for Items Putaway	120.00 Secs
Maximum time taken for a cart (PL4ETELE)	0 hrs :0 mins	Maximum time taken to Putaway in a cart (PL1ESTKB)	0 hrs :2 mins
Minimum time taken for a cart (PL4ETELE)	0 hrs :0 mins	Minimum time taken to Putaway in a cart (PL1ESTKB)	0 hrs :2 mins

Total Time: 0 hrs :02 mins

Figure 82

This is a quicker way to get to the Daily User Activity Report out into further detail.

It will show you the Maximum and Minimum time a user spent on a counting and/or putting away items on a cart/par location.

You can distinguish the Cart Counts from the Cart Putaway functions but 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.

Going back to the Daily Activity Report main page and clicking on the Productivity button will give us the following screen: ***Figure 83***

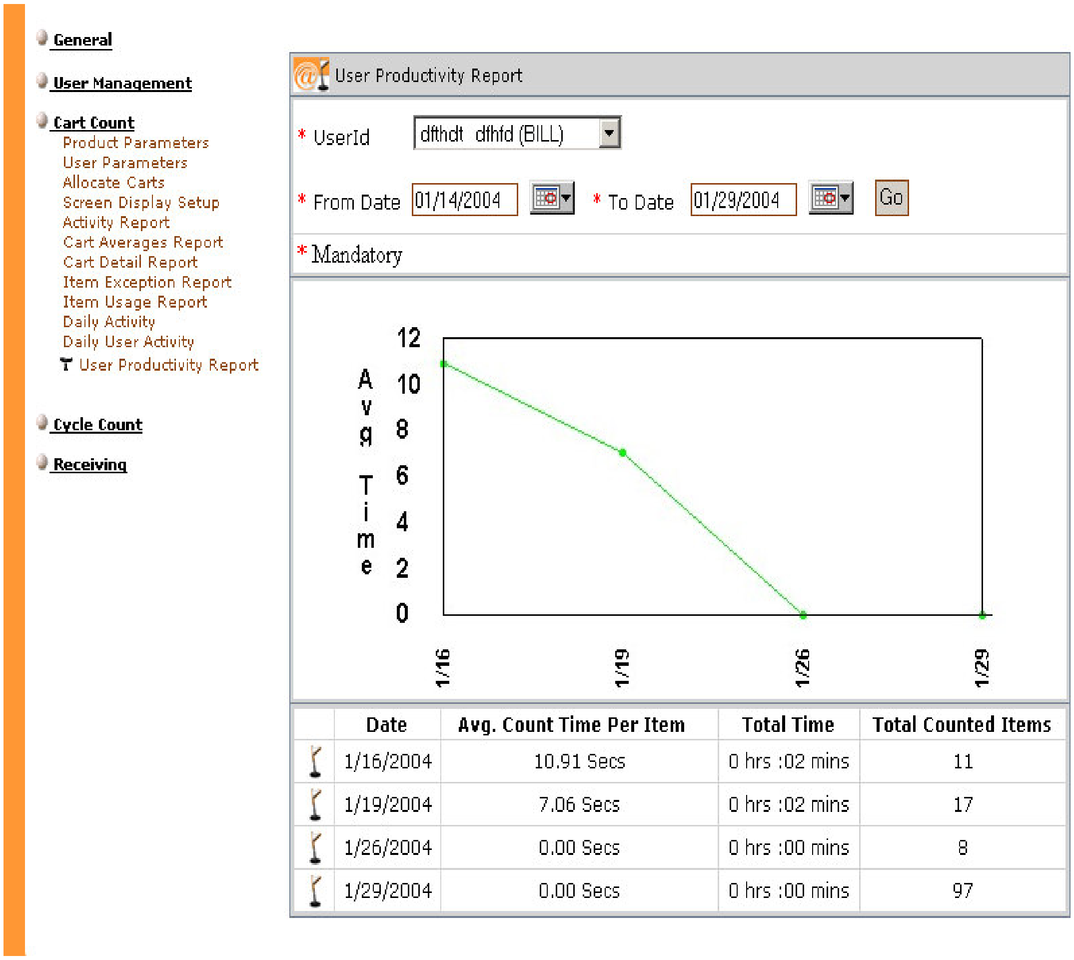


Figure 83

As you can see, a bit more of a graphic representation of the information.

Daily User Activity

This report will capture a user's daily cart count and cart putaway activity. You can distinguish the Count and Putaway processes by the color of the line items on the report. Light Gray are Cart Count processes, Dark Gray are Cart Putaway processes: ***Figure 84***

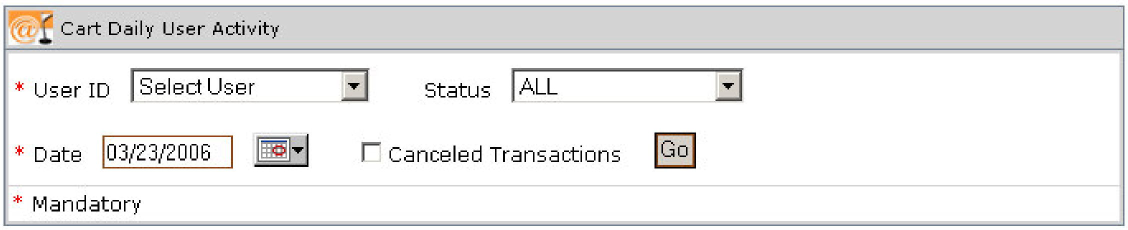
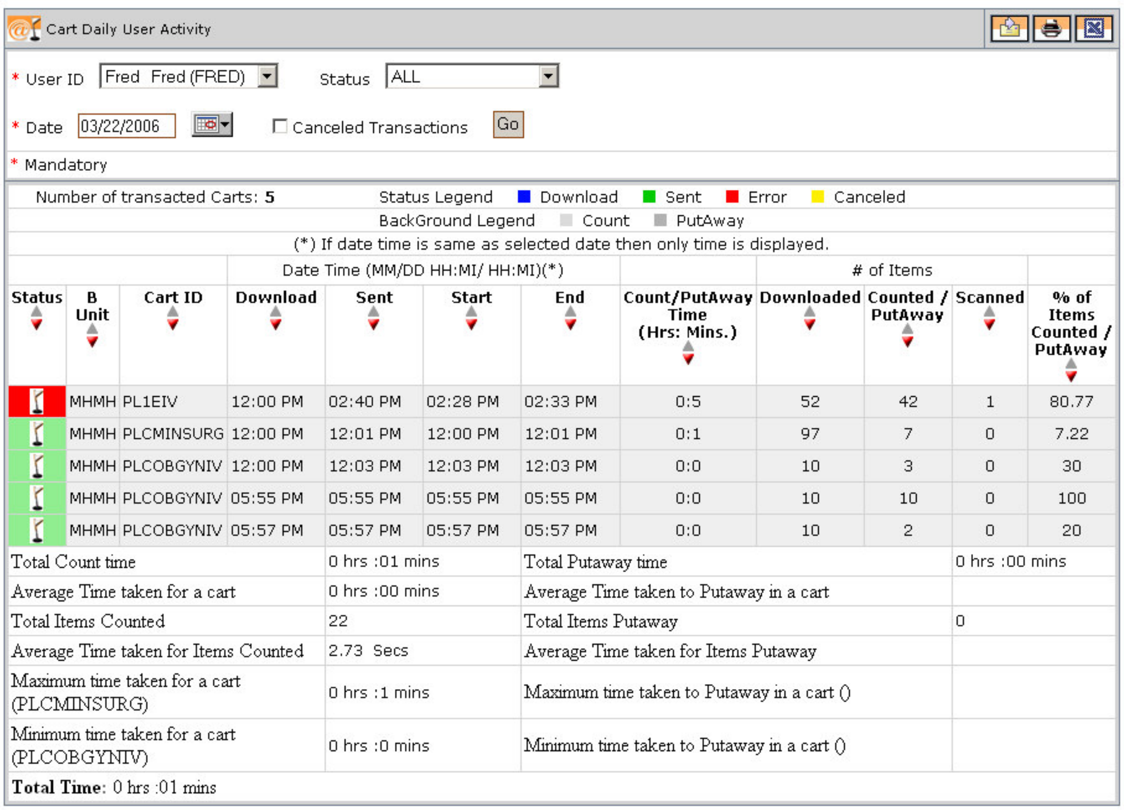


Figure 84

Select a user and Status from the drop down window: ***Figure 85***



			Date Time (MM/DD HH:MI/ HH:MI)(*)					# of Items			
Status	**B Unit**	**Cart ID**	**Download**	**Sent**	**Start**	**End**	**Count/PutAway Time (Hrs: Mins.)**	**Downloaded**	**Counted / PutAway**	**Scanned**	**% of Items Counted / PutAway**
	MHMH	PL1EIV	12:00 PM	02:40 PM	02:28 PM	02:33 PM	0:5	52	42	1	80.77
	MHMH	PLCMINSURG	12:00 PM	12:01 PM	12:00 PM	12:01 PM	0:1	97	7	0	7.22
	MHMH	PLCOBGYNIV	12:00 PM	12:03 PM	12:03 PM	12:03 PM	0:0	10	3	0	30
	MHMH	PLCOBGYNIV	05:55 PM	05:55 PM	05:55 PM	05:55 PM	0:0	10	10	0	100
	MHMH	PLCOBGYNIV	05:57 PM	05:57 PM	05:57 PM	05:57 PM	0:0	10	2	0	20

Total Count time	0 hrs :01 mins	Total Putaway time	0 hrs :00 mins
Average Time taken for a cart	0 hrs :00 mins	Average Time taken to Putaway in a cart	
Total Items Counted	22	Total Items Putaway	0
Average Time taken for Items Counted	2.73 Secs	Average Time taken for Items Putaway	
Maximum time taken for a cart (PLCMINSURG)	0 hrs :1 mins	Maximum time taken to Putaway in a cart ()	
Minimum time taken for a cart (PLCOBGYNIV)	0 hrs :0 mins	Minimum time taken to Putaway in a cart ()	
Total Time: 0 hrs :01 mins			

Figure 85

Status – The status of counts/putaways...Sent, Error, Download

Bunit – Business Unit or Company of the cart/par location that was counted or putaway.

CartID – Cart ID/Par Location that was counted or putaway.

Download – Time cart/par location was downloaded to the hand held device.

Sent – Time cart/par location was sent to Server from hand held device.

Start – Time the user stated counting or putting away this cart/par location.

End – Time the user finished counting or putting away this cart/par location

Count/Putaway Time – Total time in hours and minutes it took the user to count or putaway this cart/par location.

Downloaded – Total number of items downloaded for count or putaway.

# of Items – The actual physical number of items counted or putaway.

Scanned – Total number of items that were scanned during count or putaway process.

% of Items Counted/Putaway – The percentage of Items counted based on number downloaded.

You will also see information summarized at the bottom of this report.

User Productivity Report

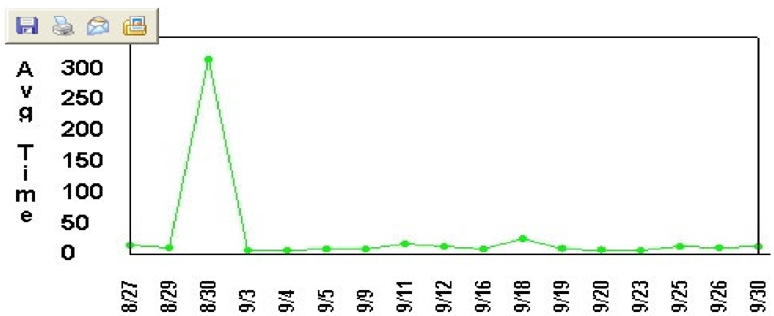
This report profiles the average time taken by a user to count a given item across a period of time. It should help a manager determine a users productiveness: ***Figure 89***

User Productivity Report

* UserId ANTHONY GRIMES (ANTHONY)

* From Date 08/10/2002 * To Date 09/09/2003 Go

* Mandatory



Date	Avg. Count Time Per Item	Total Time	Total Counted Items
8/27/2002	13.85 Secs	0 hrs :06 mins	26
8/29/2002	10.56 Secs	0 hrs :19 mins	108
8/30/2002	315.20 Secs	19 hrs :42 mins	225
9/3/2002	6.67 Secs	0 hrs :02 mins	18
9/4/2002	6.00 Secs	0 hrs :01 mins	10
9/5/2002	8.08 Secs	0 hrs :21 mins	156
9/9/2002	8.61 Secs	0 hrs :31 mins	216
9/11/2002	17.04 Secs	1 hrs :11 mins	250
9/12/2002	12.00 Secs	0 hrs :05 mins	25
9/16/2002	8.77 Secs	0 hrs :45 mins	308
9/18/2002	25.71 Secs	1 hrs :51 mins	259
9/19/2002	9.38 Secs	0 hrs :05 mins	32
9/20/2002	7.33 Secs	0 hrs :32 mins	262
9/23/2002	6.34 Secs	0 hrs :13 mins	123
9/25/2002	13.26 Secs	1 hrs :41 mins	457
9/26/2002	10.59 Secs	0 hrs :03 mins	17
9/30/2002	13.41 Secs	1 hrs :33 mins	416

Figure 89

Date - Day of the Activity.

Avg. Count Time Per Item - Average time in seconds that the user took to count this item.

Total Time – Total time the user took to count the item.

Total Counted Items – Total number of items the user counted in the cart/par location.

Cart Putaway Report

Select this option to run a report that will provide you with Putaway information, based on Cart ID/Par Location and Item ID.

Selecting this option will provide you with the following screen: ***Figure 90***

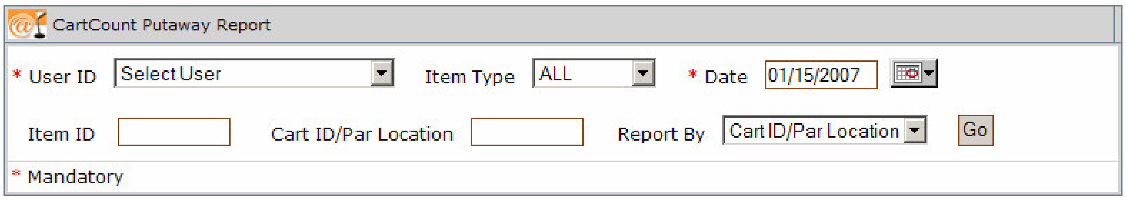


Figure 90

Select a User from the UserId drop down list. Select ALL or use drop down window to select Item Type: ***Figure 91***

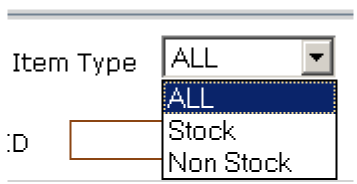
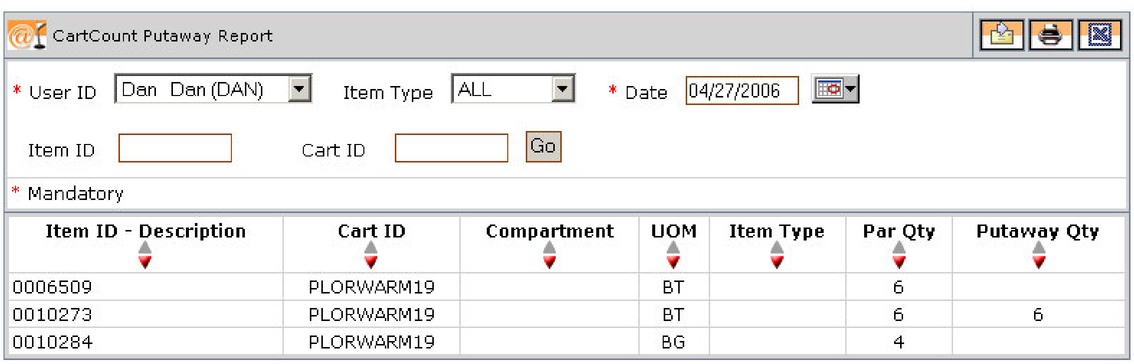


Figure 91

You can search on Cart Id/Par Location or Item Id. Also, if you want to select all, simply ***TAP*** the **Go** button. You will receive the following screen: ***Figure 92***



Item ID - Description	Cart ID	Compartment	UOM	Item Type	Par Qty	Putaway Qty
0006509	PLORWARM19		BT		6	
0010273	PLORWARM19		BT		6	6
0010284	PLORWARM19		BG		4	

Figure 92

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

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

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

UOM – Item's Unit of Measure.

Item Type – Item Type (Stock, Non-Stock).

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

Putaway Qty – Qty of Items actually Putaway.

Par Audit Report

The Par Audit Report will provide you with a Par Location's historical information or audit report. This will reflect Par Level adjustments made from the hand held devices, Optimization report, and Manage Par Locations.

Click on the **Par Audit Report** option from the **Cart Count** menu and you will see the following screen: ***Figure 69***

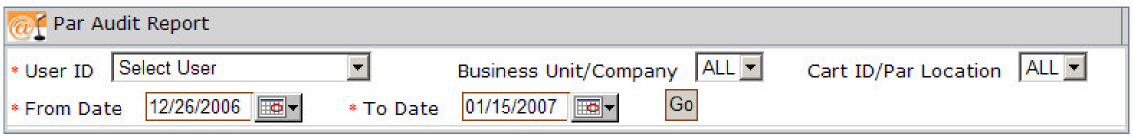
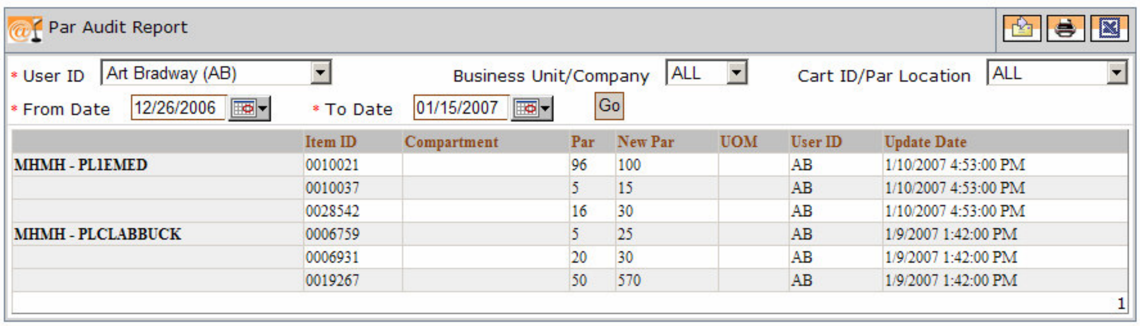


Figure 69

You **must** select a User ID and Date Range for this report. Selection of a Business Unit/Company and Cart ID/Par Location are optional: ***Figure 70***



	Item ID	Compartment	Par	New Par	UOM	User ID	Update Date
MHMH - PL1EMED	0010021		96	100		AB	1/10/2007 4:53:00 PM
	0010037		5	15		AB	1/10/2007 4:53:00 PM
	0028542		16	30		AB	1/10/2007 4:53:00 PM
MHMH - PLCLABBUCK	0006759		5	25		AB	1/9/2007 1:42:00 PM
	0006931		20	30		AB	1/9/2007 1:42:00 PM
	0019267		50	570		AB	1/9/2007 1:42:00 PM

1

Figure 70

The report will display the Company/Business Unit-Cart ID/Par Location in the first column.

Then Item ID, Compartment, Par Qty, New Par Qty, Item's UOM, User ID and Date of Update will display.

Activity Report

For a given date range, users can see a summary report of Download and Upload (sent) 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). Below is the screen you will see after you select Activity Report from the menu. This is actually the Report you see by clicking on the **Detail** button: ***Figure 71***

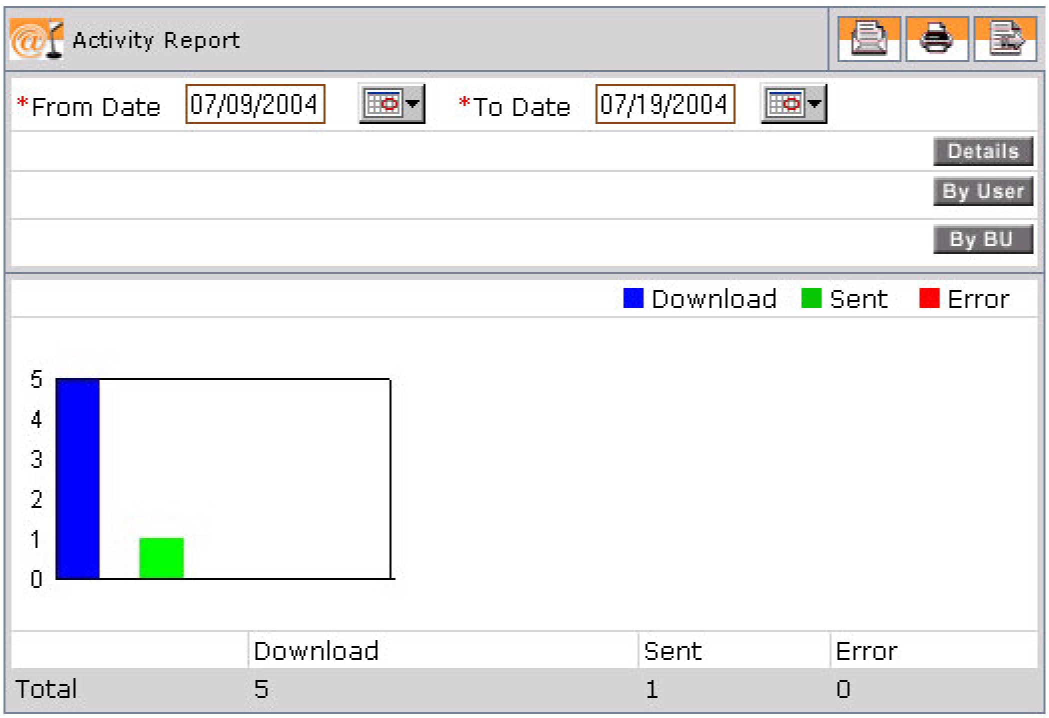
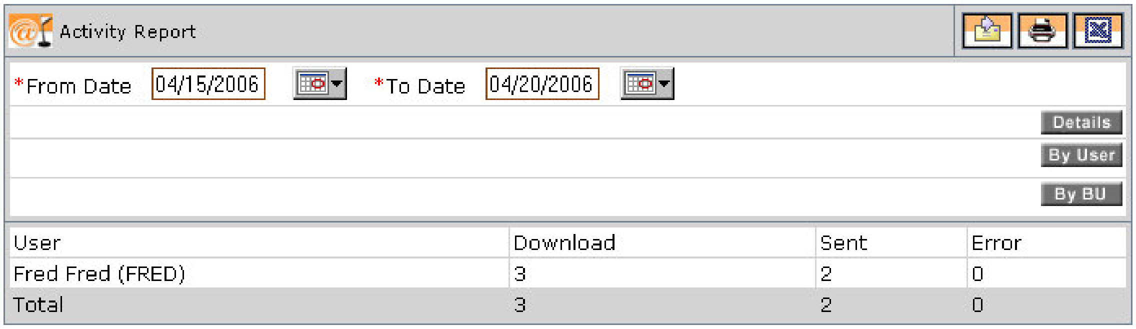


Figure 71

Before we continue, there are 3 new features in 2.5 and above @Par version server reports. In the upper right hand corner, you will see 3 icons. They give you the ability to send the report via Email, Printing the report, or Exporting to excel. Any report that you see the will have these capabilities.

Click on the **By User** button and the following screen will appear: ***Figure 72***



Activity Report

*From Date 04/15/2006 *To Date 04/20/2006

Details

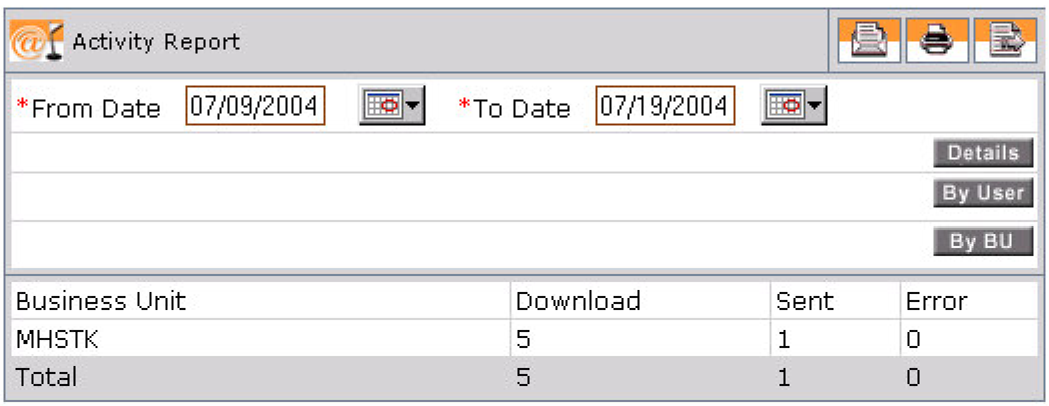
By User

By BU

User	Download	Sent	Error
Fred Fred (FRED)	3	2	0
Total	3	2	0

Figure 72

Click the **By BU** button to see the screen below: ***Figure 73***



Activity Report

*From Date 07/09/2004 *To Date 07/19/2004

Details

By User

By BU

Business Unit	Download	Sent	Error
MHSTK	5	1	0
Total	5	1	0

Figure 73