Cycle Count
Web Users Guide
Version 2.6.6

This document is intended for Web Server Users

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

Change Record

Date	Author	Version	Change Reference
7/24/2008	D. Baxter	2.6.5.0	New document
7/27/2008	R. Hatt	2.6.5.0	Modified with new screen shots and text
12/10/2010	R. Hatt	2.6.6	New Version Release
3/25/2011	S. Godfrey	2.6.6	SP2
7/11/2012	R.Hatt	2.6.6	SP5

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Web User - Login

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

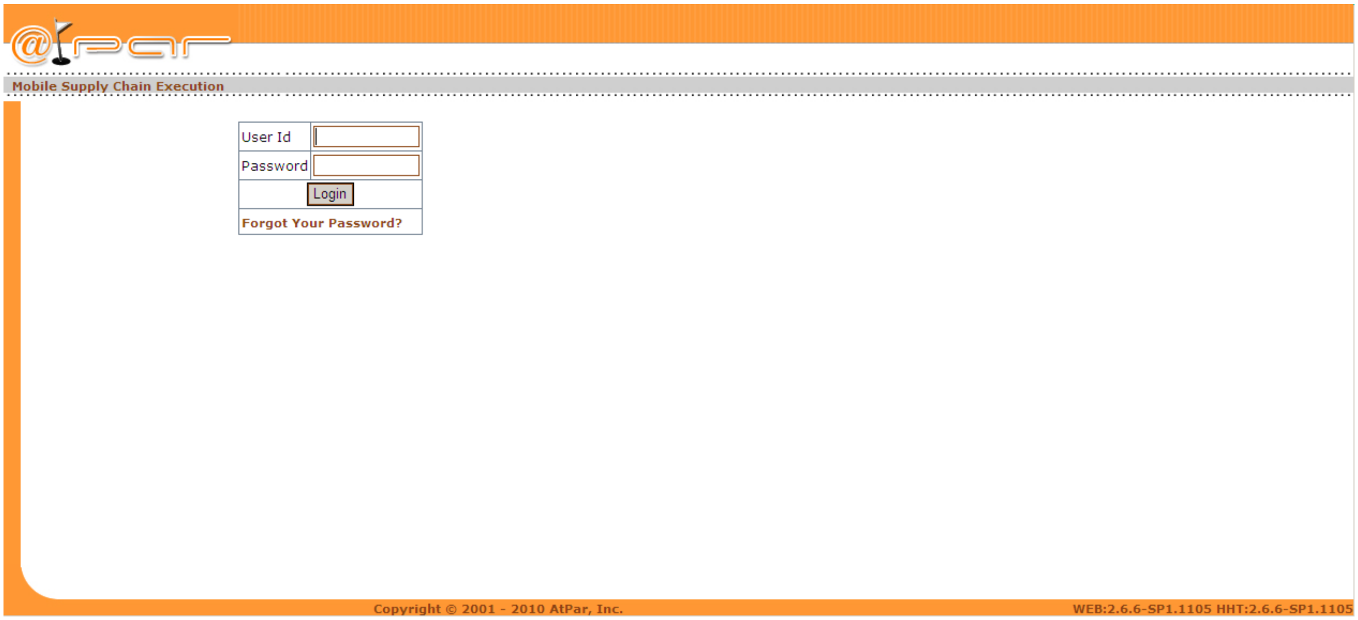

Figure 1

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

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

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

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Page Menu Options

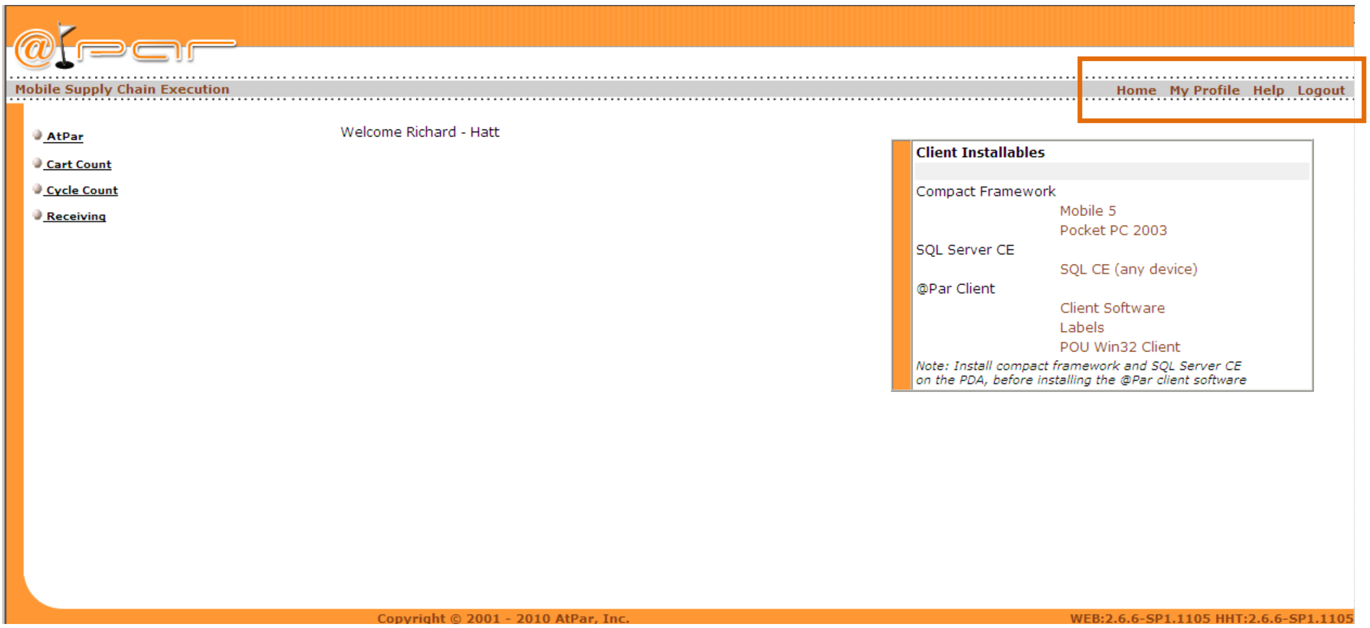

Figure 2

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

Home

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

My Profile

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

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MANAGEMENT HEALTH SOLUTIONS

My Profile

Submit

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

Submit

* Mandatory

Figure 3

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

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

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

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

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

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

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

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

Help

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

Figure 4

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

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

Logout

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

Client Installable Files

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

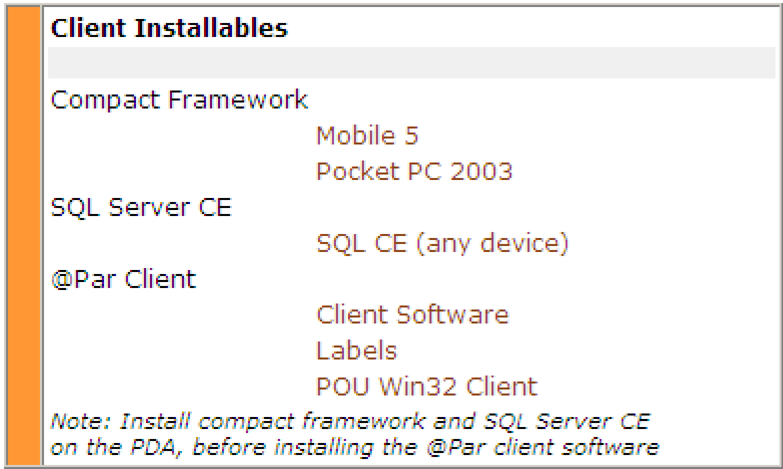

Figure 5

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

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User Parameters

There are no additional User parameters for Cycle Count. All parameters will be set by the @Par Administrator or Web Users with @Par privileges.

@Par recommendation is to have the @Par Administrator remove this menu link from your login.

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Allocate Events

This option is used by the Web User or Supervisor to allocate counting events to HHT users.

If the ***"Allocation of Events to Users Required"*** Org parameter below is checked, all events must be allocated to users in order for them to download to the HHT.

Allocation of Events to Users Required	☑	[Checking this option will allow user to download allocated Events, Unchecking this will allow user to download any event]

If the parameter is **"unchecked"** any HHT user can download any counting event.

Click on Allocate Events in the web menu.

If no **Inventory** business units have been assigned to the Org Group ID there will be nothing to allocate.

The @Par Administrator or Web user with administrative rights must assign them using the **Manage Org Group, Assign Company/BUnits** link shown below:

	HOSP1	Main Hospital	Assign Company/BUnits	Assign Parameters

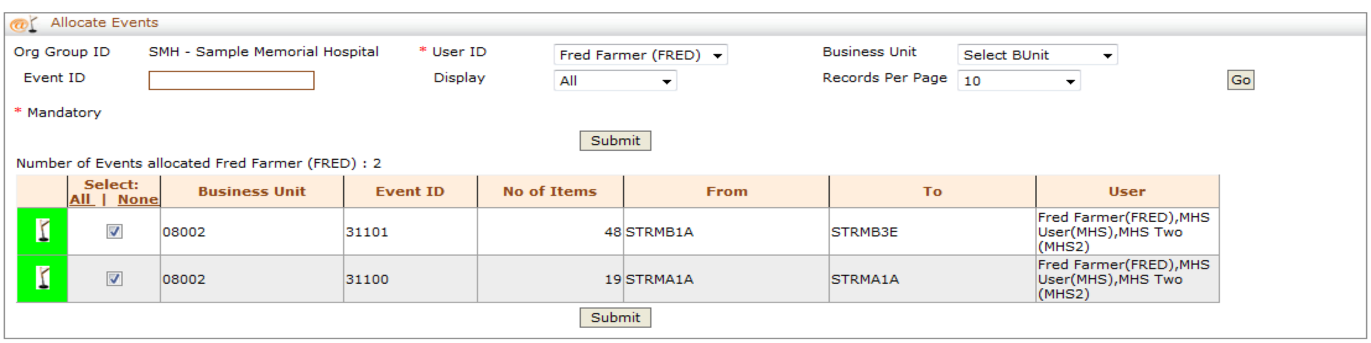
Once set up is complete, ***click*** on Allocate Events in the web menu.

If you want to view and assign ONLY those events that aren't allocated, under the **Display** option select **Unallocated** from the drop down menu.

If this is a user that has events already assigned and you wish to change the current events assigned to this user, select the **Allocated** option under the display option.

Leaving the display set to the default of **ALL** means that all events, both allocated and unallocated will display.

For this example, we will select **ALL.** Select a **User Id** and click on the Go button. **Figure 6**


Allocate Events

Org Group ID SMH - Sample Memorial Hospital * User ID Fred Farmer (FRED) Business Unit Select BUnit

Event ID Display All Records Per Page 10 Go

* Mandatory

Submit

Number of Events allocated Fred Farmer (FRED) : 2

	Select: All | None	Business Unit	Event ID	No of Items	From	To	User
	☑	08002	31101	48	STRMB1A	STRMB3E	Fred Farmer(FRED),MHS User(MHS),MHS Two (MHS2)
	☑	08002	31100	19	STRMA1A	STRMA1A	Fred Farmer(FRED),MHS User(MHS),MHS Two (MHS2)

Submit

Figure 6

The columns are: **Select All or None** with check boxes, **Business Unit, Event Id, Number of Items, From** Storage Location, **To** Storage Location, and **User.**

Clicking on the check box will place a check mark in the box which means you are setting the event to be counted by this user.

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If you see additional **Events** that you don't want to allocate for this user to count, simply leave that check box unchecked.

Business Unit – Business Unit/Company

Event ID – Event Id # which is generated from your organization's ERP or enterprise system (i.e. PeopleSoft).

No of Items – Number of items assigned to the event

From – This is the start location of the event items to count

To – This is the end location of the event items to count

User – Displays the Users that an event has been allocated to.

Once the **Event/s** has been allocated ***click*** the Submit button.

The columns can be sorted in ascending and descending order by clicking on the column headers.

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Review Counts

The **Review Counts and Process Counts** (discussed later in this document) functions are optional, based on the "Review Item counts" Org Group Parameter shown below.

Review item counts	☑	[Checking this will allow review process for the counts before sending them to the enterprise system]

If selected, the count information for all events will be retained in the @Par database in order for web users to review the counts or use process counts before sending to the respective ERP system.

Note: If this option is unchecked, the counts will be sent immediately to the ERP system from the HHT when send button is selected from the HHT.

Click on **Review Counts** in the web menu.

If there aren't any events yet counted the Event ID drop down will be empty. **Figure 7**

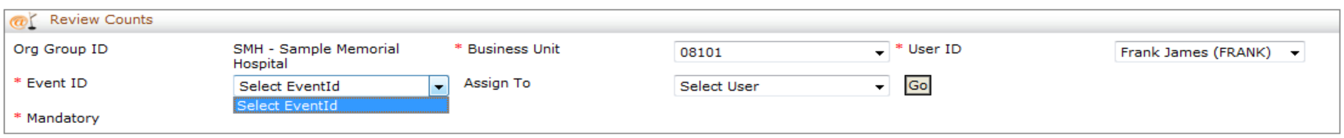
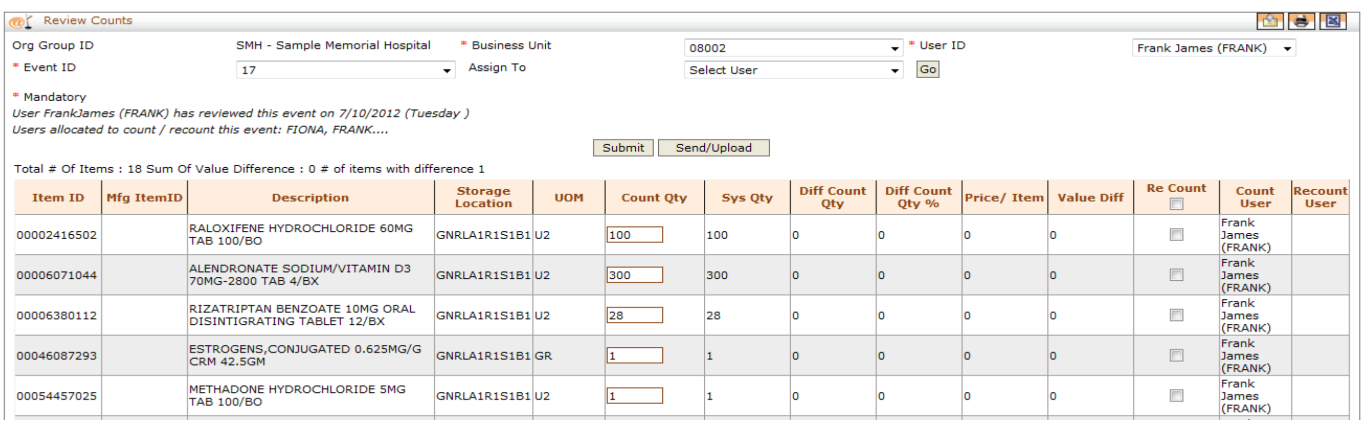


Figure 7

If there are counts available to review, select the applicable event id from the drop down and ***click*** the Go button. **Figure 8** appears



Item ID	Mfg ItemID	Description	Storage Location	UOM	Count Qty	Sys Qty	Diff Count Qty	Diff Count Qty %	Price/ Item	Value Diff	Re Count	Count User	Recount User
00002416502		RALOXIFENE HYDROCHLORIDE 60MG TAB 100/BO	GNRLA1R1S1B1	U2	100	100	0	0	0	0	☐	Frank James (FRANK)	
00006071044		ALENDRONATE SODIUM/VITAMIN D3 70MG-2800 TAB 4/BX	GNRLA1R1S1B1	U2	300	300	0	0	0	0	☐	Frank James (FRANK)	
00006380112		RIZATRIPTAN BENZOATE 10MG ORAL DISINTIGRATING TABLET 12/BX	GNRLA1R1S1B1	U2	28	28	0	0	0	0	☐	Frank James (FRANK)	
00046087293		ESTROGENS,CONJUGATED 0.625MG/G CRM 42.5GM	GNRLA1R1S1B1	GR	1	1	0	0	0	0	☐	Frank James (FRANK)	
00054457025		METHADONE HYDROCHLORIDE 5MG TAB 100/BO	GNRLA1R1S1B1	U2	1	1	0	0	0	0	☐	Frank James (FRANK)	

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60505265605		TRIAMTERENE/HYDROCHLOROTHIAZIDE 37.5-25MG TAB 500/BO	GNRLA1R1S1B1	U2	500	507	(7)	(1.38)	0	0	☐	Frank James (FRANK)	
63304050920		AMOXICILLIN TRIHYDRATE/POTASSIUM CLAVULANATE 875-125MG TAB 20/BO	GNRLA1R1S1B1	U2	2	2	0	0	0	0	☐	Frank James (FRANK)	
66582031574		EZETIMIBE/SIMVASTATIN 10MG-80MG TAB 500/BO	GNRLA1R1S1B1	U2	2	2	0	0	0	0	☐	Frank James (FRANK)	
67253010111		ACYCLOVIR 400MG TAB 1000/BO	GNRLA1R1S1B1	U2	2	2	0	0	0	0	☐	Frank James (FRANK)	

Total # Of Items : 18 Sum Of Value Difference : 0 # of items with difference 1

Submit Send/Upload

Figure 8

If the count is reviewed, is not a split event, and no recounts are required the manager or Web User can use the Send/Upload button to post the information to the ERP system.
If the count requires further review, is a split event, or recounts are still required the manager will ***click*** the Submit button. This will require the manager to use **Process Counts** to move the data to the ERP system.

The screen below is representative of an event that has already been counted but not sent to the ERP system. Note that the Send/Upload button is no longer visible or available.

Review Counts

Org Group ID	SMH - Sample Memorial Hospital	* Business Unit	08002	* User ID	Fred Farmer (FRED)
* Event ID	31100	Assign To	Select User	Go	

* Mandatory

User FredFarmer (FRED) has reviewed this event on 3/28/2012 (Wednesday)

Users allocated to count / recount this event: FIONA, FRANK....

Submit

Total # Of Items : 19 Sum Of Value Difference : 978.2403 # of items with difference 17

Item ID	Mfg ItemID	Description	Storage Location	UOM	Count Qty	Sys Qty	Diff Count Qty	Diff Count Qty %	Price/ Item	Value Diff	Re Count ☐	Count User	Recount User
10000045		DRAPE TRANSPARENT 23X17IN STERI-DRAPE INCISE ADHESIVE STRIP LATEX FREE STERILE DISPOSABLE	STRMA1A	EA	14	110	(96)	(87.27)	2.881	(276.576)	☑	Fred Farmer (FRED)	FRED
10007612		CONTAINER SHARPS 11.25X 10X6.75IN BD REGULAR FUNNEL ENTRY MULTIUSE NESTABLE COLLECTOR AUTOCLAVABLE RED CLEAR LATEX FREE NONSTERILE 8QT	STRMA1A	EA	2	14	(12)	(85.71)	2.4279	(29.1348)	☑	Fred Farmer (FRED)	FRED
00006071044		ALENDRONATE SODIUM/VITAMIN D3 70MG-2800 TAB 4/BX	STRMA1A	U2	2	0	2	0	0	0	☐	Kent Smith (KSMITH)	

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10055520		WRAP STERILIZATION 36X36IN HEAVY DUTY NONWOVEN KIMGUARD ONE-STEP SMS FABRIC LATEX FREE DISPOSABLE MEDIUM BLUE KC300	STRMA1A	EA	7	720	(713)	(99.03)	0.7583	(540.6679)		Fred Farmer (FRED)	
10055619		WRAP STERILIZATION 54X54IN 1 PLY HEAVY DUTY NONWOVEN KIMGUARD ONE-STEP SMS FABRIC NONSTERILE LATEX FREE DISPOSABLE	STRMA1A	EA	45	216	(171)	(79.17)	2.1529	(368.1459)		Fred Farmer (FRED)	
10058464		URINAL PATIENT GRADUATED HANGING HANDLE LID MALE DISPOSABLE 1L PLASTIC STANDARD TRANSLUCENT	STRMA1A	EA	4	106	(102)	(96.23)	0.4624	(47.1648)		Fred Farmer (FRED)	
10060328		GLOVE SURGICAL BIOGEL 6 POWDER FREE BEADED CUFF LDP POLYMER LATEX STERILE	STRMA1A	EA	7	102	(95)	(93.14)	0.9338	(88.711)		Fred Farmer (FRED)	
10079353		GLOVE SURGICAL BIOGEL 5.5 POWDER FREE BEADED CUFF LDP POLYMER LATEX STERILE	STRMA1A	PR	5	100	(95)	(95)	0.9338	(88.711)		Fred Farmer (FRED)	

Total # Of Items : 19 Sum Of Value Difference : 978.2403 # of items with difference 17

Submit

Figure 9

The screen can continue to be used to edit and recount items until it is ready to be posted to the ERP system. At that time the manager will use the Submit button and then go to **Process Counts**. Please review the **Process Counts** section later in this document.

If review is successfully, the following screen will display **Figure 10**

Review Counts Updated Successfully

Review Counts

Org Group ID: SMH - Sample Memorial Hospital — * Business Unit: Select Bunit — * User ID: Select User

* Event ID: Select EventId — Assign To: Select User — Go

* Mandatory

Figure 10

Note: In the header the Assign To option allows a user to be designated to Recount the items. Their User ID will appear in the Recount user column at the end of the screen.

Any column that is highlighted **(Storage Location, Count Qty etc.)** can be sorted by ***clicking*** on the column header

Item ID – Item number

Mfg Item ID – The Item's manufacturer Item ID

Description – Item description

Storage Location – Item's physical location

UOM – Item's Unit of Measure

Count Qty – Actual quantity the HHT user has counted for this item – If the following Profile Parameter has been checked by the @Par Administrator or web user with admin rights, the web user can edit the counts

Edit Item Counts	☑	[Checking this will allow user to adjust the item counts while reviewing on the AtPar server]

If the parameter is unchecked the web user can only review the count quantity without editing ability. To edit or recount the item the Web user checks the Recount button on this screen and an HHT user has to download the event and count the item again.

Sys Qty – Displays the system quantity on hand from the ERP system

Diff Count Qty – Displays the difference from the Count Qty less System Qty in this column.

Diff Count Qty % – Displays the percentile difference between the Count Qty and the System Qty.

Price/Item – The Item's price.

Value Diff – The difference in value from Actual Count vs. System Count.

Recount – If this box is checked, it will download onto the HHT again to be recounted

Count User – User ID that performed the count

Recount User – User ID that performed the recount

Now that we know the columns, let's explain how this option works.

In **Cart Count**, when a user completes a count and ***TAPs*** on the Send Selected or Send All buttons, the HHT device uploads or moves this information to the ERP Production Server.
In **Cycle Count**, we handle this a little differently. The user still does the ***count*** on the HHT. However, in **Cycle Count**, we provide the option to upload or move this information to our **@Par** Server first and not directly to the ERP Production server.

In order to store the counts and review prior to sending the Org Parameter "Review Item counts" must be checked. This allows the **Web User** the opportunity to thoroughly review the **Event** count **prior** to uploading or moving the information to the ERP Production server.

On the **Review Counts** web page, with the Profile Parameter "Edit Item Counts" checked, **Count Qty** field is editable**.** This allows the **Web User** the ability to edit the count on this screen. Or, the **Web User** can opt to have a **HHT User** recount the item/s.

If the **Web User** determines that the count is off or doesn't look correct they can either enter the count on the Web Page or ***check*** the **Recount** box and ***click*** on the [Submit] button.

If the Recount Box is checked, the HHT user will then log into **Cycle Count** on the HHT. From the **Cycle Count** status screen there is a box for ☐ Recount and New .

The user checks this box on their HHT and then downloads the **Event** and item/s. The **HHT User** will see any items the **Web User** has checked for recount as well as any new items not yet counted on the **Event**.

The **HHT User** then recounts the item, enters the count quantity, and **Sends** the **Event** again.

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NOTE: This process can be repeated as many times as needed but once the data has been sent/uploaded to the ERP system the information is removed from the @Par Server, can no longer be viewed on @Par, and MUST be adjusted on the ERP system.

Once the **Web User** is satisfied with the counts there are 2 ways of processing the information.

1. From the **Review Counts** screen the **Web User** can select the Send/Upload button or,
2. ***Click*** the Submit button to save the data and exit from this option. ***Select*** the **Process Counts** link and the process to send data to the ERP system will be explained in the next section.

If the **Web User** selected option #1, **Figure 11** may appear

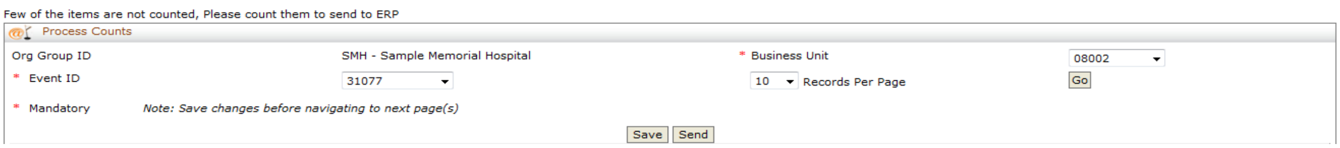

Figure 11

Click the OK button and finish counting the items.

Click the Send/Upload button again.

Successful send to the ERP Production database will display following screen **Figure 12**

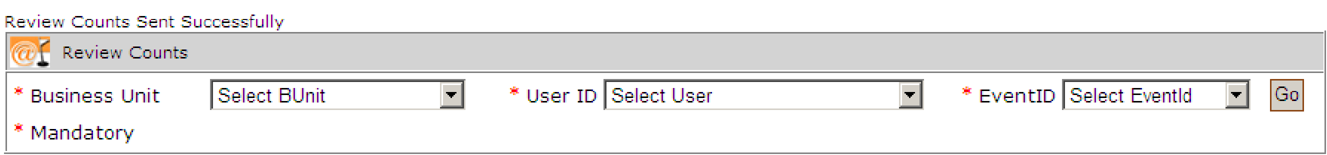

Figure 12

Process Counts

The **Process Counts** option can be used like the Review Counts option and send **Event** counting data to the ERP system. The process is also mandatory for split counting events.

The **Process Counts** option will be used for organizations that want to capture and track the counts of the same counting event performed by different users. If an organization has one user do an initial count, then another go after them to count the same event, the **Process Counts** will track both user counts. The Web User has an option to select which count to send to the ERP, or Edit the count altogether.

Click the **Process Counts** link and the following screen is displayed **Figure 13**

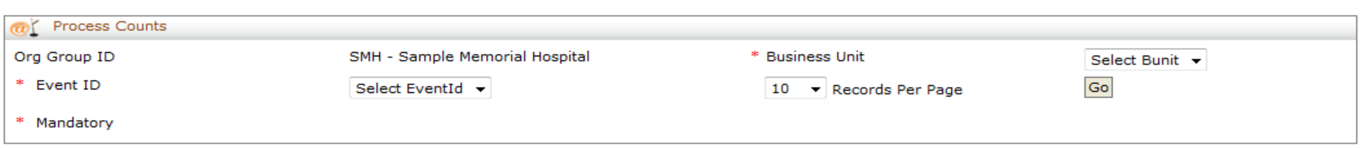

Figure 13

Select the **Business Unit** and **Event Id** from the drop down list, and **click** the Go button to display the following information. **Figure 14**

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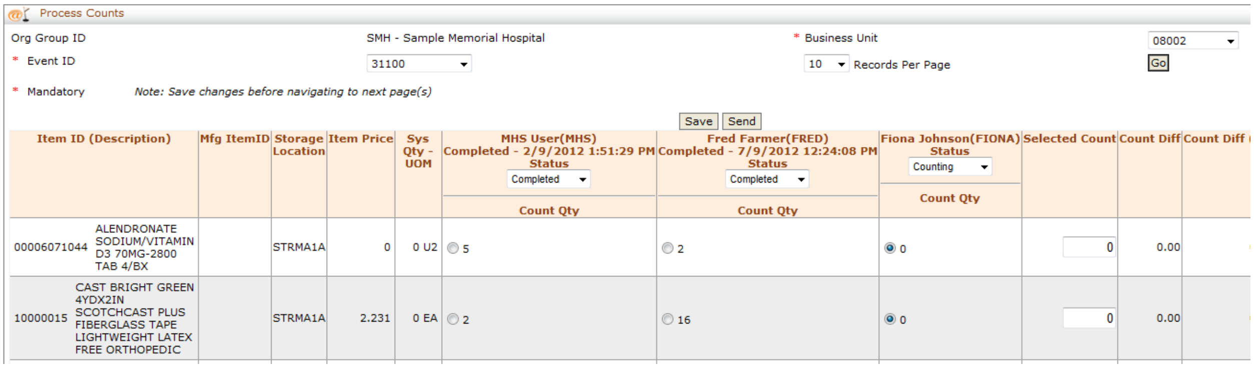

Figure 14

Critical Note: Save changes before navigating to next page! This means you need to click the SAVE button on Page one if you want to save changes before moving to Page 2.

Fields on this screen are similar to the **Review Counts** screen:

Item ID (Description) – Item number with description

Mfg Item ID – The Item's manufacturer ID

Storage Location – Item's physical location at time of count

Item Price – The Item's price/cost at time of count

Sys Qty - UOM – On hand quantity the ERP system shows at time of count and the item's Unit of Measure

Count Qty – Actual quantity the user has counted for this item. There may be up to 3 separate and unique counts per Event ID

Note the screen change when selecting Count Qty button Figure 15

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Process Counts

* Business Unit STKRM * Event ID 20 10 Records Per Page Go

* Mandatory *Note: Save changes before navigating to next page(s)*

Save Send

Item ID (Description)	Mfg ItemID	Storage Location	Item Price	Sys Qty - UOM	atpar hht(ATPAR) Status Counting Count Qty	Fred Jones(FRED1) Status Counting Count Qty	Selected Count	Count Diff	Count Diff (%)	Value Diff($)	Ext $ Value
0030309 TEMPLATE,M	65-15506	STKR01H01I	36.55	300 EA	300		300	0.00	0.00	0.00	10,965.00
0030310 SCREW,LOCK	50-20504	STKR01I01F	255.3	300 PK	300		300	0.00	0.00	0.00	76,590.00
0030311 SCREW,E.R.	50-27410	STKR01I01E	193.2	300 PK	300		300	0.00	0.00	0.00	57,960.00
0030313 SCREW,5X45	02.205.245	STKR01G01N	180	300 EA	300		300	0.00	0.00	0.00	54,000.00
0030315 PLATE,4.5X	224.581	STKR01F01B	493	300 EA	300	345	345	45.00	15.00	22,185.00	170,085.00
0030316 PLATE,4.5X	224.601	STKR01F01D	562	294 EA	294	45	45	(249.00)	(84.69)	(139,938.00)	25,290.00
0030317 PLATE,4.5X	224.611	STKR01F01E	606	300 EA	300		300	0.00	0.00	0.00	181,800.00
0030318 PLATE,4.5X	226.601	STKR01F01C	650	299 EA	299	345	345	46.00	15.38	29,900.00	224,250.00
0030319 PLATE,4.5X	226.581	STKR01F01A	559	300 EA	300	456	456	156.00	52.00	87,204.00	254,904.00
0030321 RETRACTOR,	202-155	STKR01G01F	23.13	300 EA	300		300	0.00	0.00	0.00	6,939.00

1 2 3 4 5 ...

Save Send

Figure 15

Selected Count – If multiple counts are available the Count Qty count that is currently selected will display. This allows the Web user the opportunity to select one count per item before sending to the ERP system.

Count Diff – Displays the physical count difference from the actual Count Qty less System Qty in this column.

Count Diff % – Displays the percentile difference between the Count Qty and the System Qty.

Value Diff – The difference in value from Actual Count vs. System Count

Est $ Value – Total item value in $

NOTE: **There can be up to 3 Count Qty columns, depending on the number of times the Event is counted. For each count column there will be a drop down Status list**

Status types are:

- **Counting –** The event is being counted
- **Cancelled –** The event has been cancelled
- **Downloaded –** The event and items have been downloaded to the HHT but counting has **not** started
- **Completed –** The event has been counted but not sent to the ERP system

The **Web User** now has the ability to review all counts and either edits the count in the edit field box next to the item, or ***click*** the radio button next to the item count column they want to use.

IMPORTANT NOTE: The Web User can include a selection from ANY of the count columns but ONLY ONE count per item

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Sending to ERP system from the Process Counts screen

To send an event to the ERP system, ***click*** the Send button.

The system will only send completed status events. A warning will appear "Events with a status other than Completed cannot be sent"

You will receive the following screen shown here in **Figure 16**

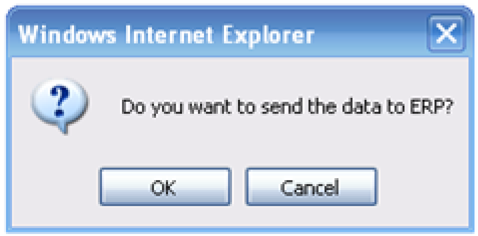

Figure 16

Click the OK button to upload/move data to the ERP production server or ***click*** the **Cancel** button to cancel this action and return to the *Process Counts* screen.

Recounting from Process Counts option

If the Web User determines an item from an event must be recounted, they will ***click*** the **Save** button after review and request the HHT User download the event again.

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MANAGEMENT HEALTH SOLUTIONS

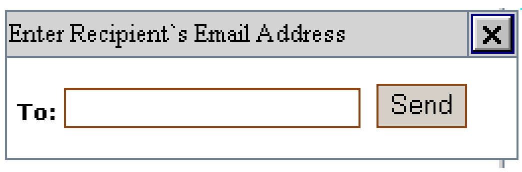
Reports

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

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

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

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

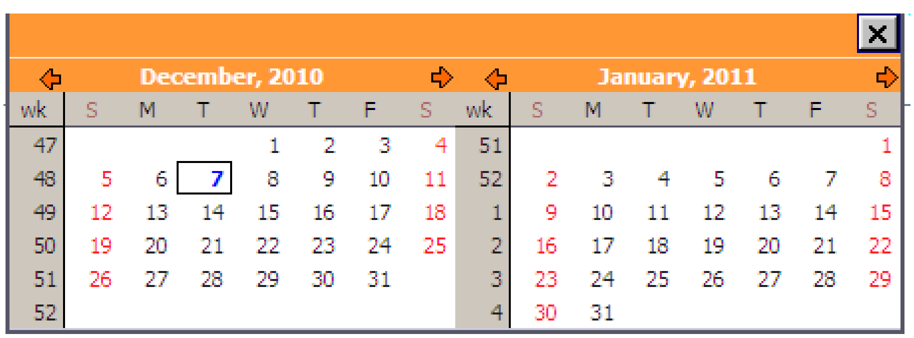


Enter the email address of the person the report is being emailed to and press the Send button. ***Clicking*** the button will cancel and return you back to the report.

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

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

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



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

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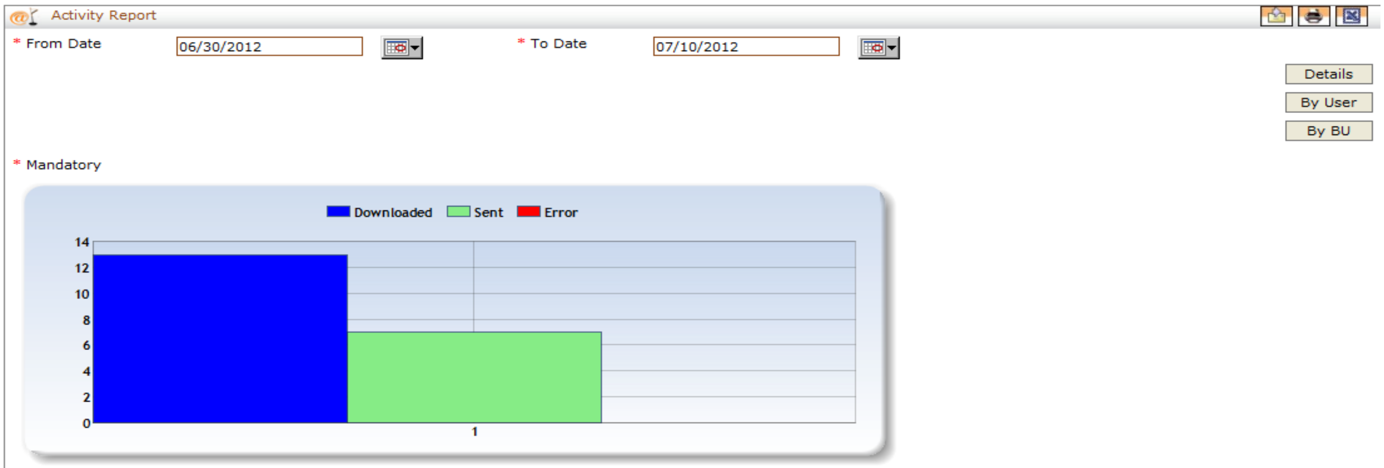
MANAGEMENT HEALTH SOLUTIONS

Activity Report

For a given date range, users can see a summary report of Events that have been downloaded and sent.

The Errors reflect those Events that were not uploaded to the **@Par** server or ERP Server.

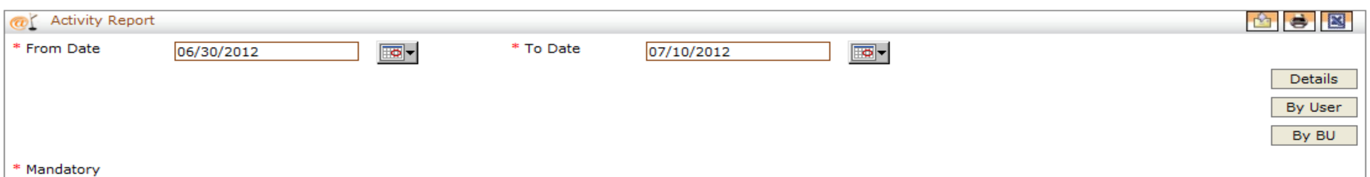
The reports can be generated per User (By User) and per Business Unit (By BU). Below is the screen you will see after you select Activity Report from the menu. This is actually the Report you see by clicking on the Details button.



	Download	Sent	Error
Total	13	7	0

Figure 17

Click the By User button on the right side of this report and the following **Figure 18** screen will display.



User	Download	Sent	Error
Fiona Johnson (FIONA)	7	4	0
Frank James (FRANK)	3	2	0
Fred Farmer (FRED)	3	1	0
Total	13	7	0

Figure 18

Click the By BU button and the **Figure 19** will be displayed.

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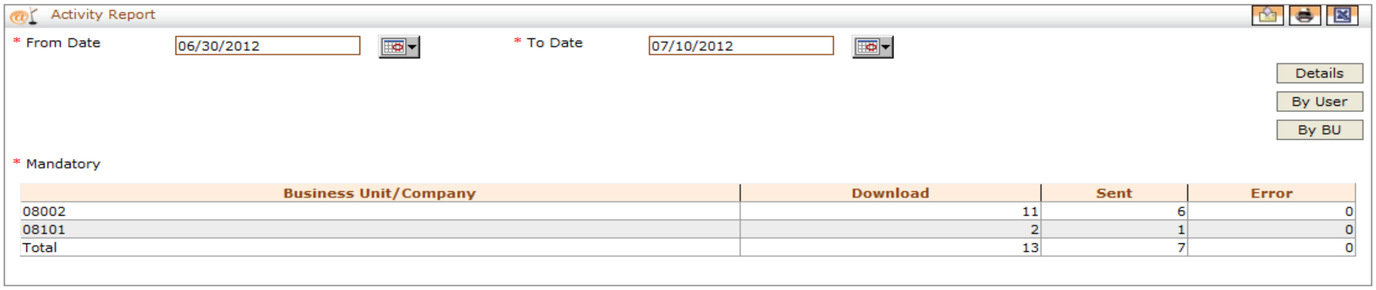
MANAGEMENT HEALTH SOLUTIONS



Business Unit/Company	Download	Sent	Error
08002	11	6	0
08101	2	1	0
Total	13	7	0

Figure 19

Item Exception Report

This report details item statistics of counts.

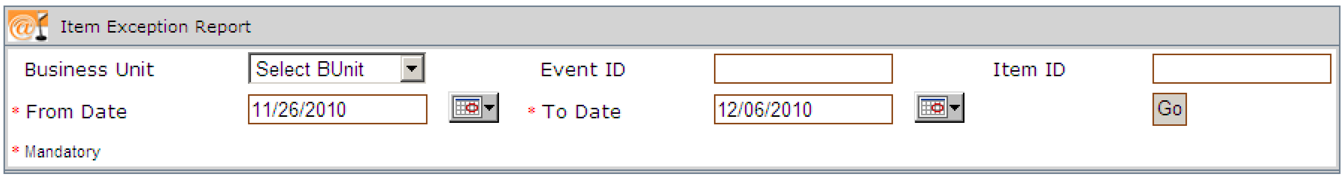
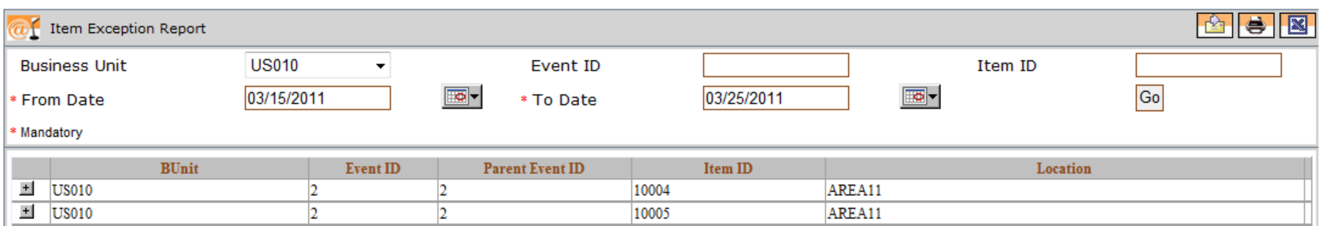


Figure 20

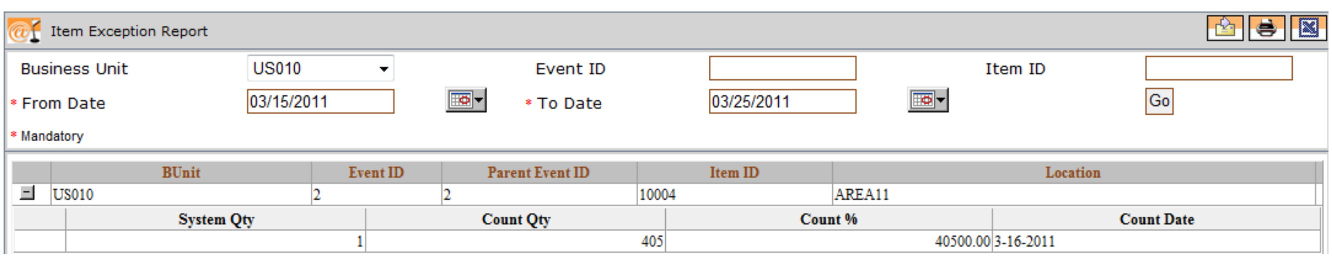
Select the **Business Unit** and date range and ***click*** on Go will display the data details as shown here in **Figure 21*.***



	BUnit	Event ID	Parent Event ID	Item ID	Location
+	US010	2	2	10004	AREA11
+	US010	2	2	10005	AREA11

Figure 21

Click the Plus sign



	BUnit	Event ID	Parent Event ID	Item ID	Location
−	US010	2	2	10004	AREA11

	System Qty	Count Qty	Count %	Count Date
	1	405	40500.00	3-16-2011

Figure 22

B Unit – Business Unit/Company

Event ID – Event ID

Parent Event ID – If the event was split, the Parent Event ID is the original counting event ID created from the ERP system

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MANAGEMENT HEALTH SOLUTIONS

Item ID – Item ID.

Location – Physical location of the item.

System Qty – System Quantity specified for that item on the ERP system.

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

Count % – Percentile value of System Quantity verses the Actual Count of an item.

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

Daily Activity Report

Selecting this option you give you a summary of the Daily Cycle Count activity and events. Shown here in **Figure 23**

Daily Activity

* Date 07/10/2012 Go

* Mandatory

User	Total Count Time	No of Events Counted	No Of Items Counted	Avg. time taken for an item	
Fiona Johnson(FIONA)	0 Mins	2	9	0 Secs	Details
Frank James(FRANK)	2 Mins	2	24	5 Secs	Details
Fred Farmer(FRED)	0 Mins	1	6	0 Secs	Details

Figure 23

Click the **Details** item to the far right of a User's information and you will receive the following screen. This is essentially a fast method to retrieve the Daily User Activity Report: **Figure 24**

Daily User Activity

* User ID Fred Farmer (FRED) Status All

* Date 07/10/2012 Go

* Mandatory

Number of transacted Events : 3 Status Legend Download Sent Error

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

			Date Time (MM/DD HH:MI/ HH:MI)(*)					# of Items			
Status	Business Unit	Event ID	Download	Sent	Start	End	Count Time (Hrs:Mins)	Downloaded	Counted	% of Items Counted	Device ID
	08002	17	12:29 PM					18	0	0.00	001346E604E...
	08002	31077	12:29 PM					19	0	0.00	001346E604E...
	08002	18A	12:29 PM	12:29 PM	12:29 PM	12:29 PM	0:00	6	6	100.00	001346E604E...

Total Count Time	0 hrs :00 mins
Average Time taken for an event	0 hrs :00 mins
Total Items Counted	6
Average Timetaken for Items Counted	0.00
Maximum time taken for an event (Event ID : 18A)	0hrs :0 mins
Minimum time taken for an event (Event ID : 18A)	0hrs :0 mins

Figure 24

See the Daily User Activity section that follows.

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MANAGEMENT HEALTH SOLUTIONS

Daily User Activity Report

This report will show you the same thing, by user, as the Daily Activity Report. You need to select a **User Id** and Date from the drop down choices shown here in **Figure 25**.

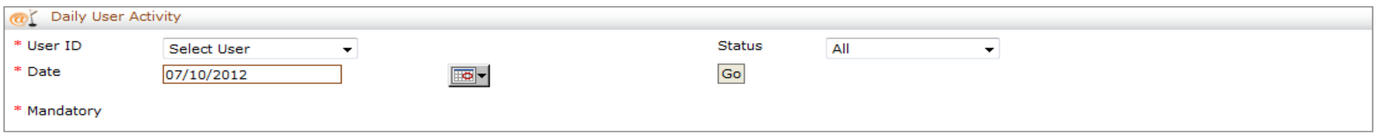


Figure 25

Select a User and either **ALL** or **Status** from the Status drop down window: **Figure 26**

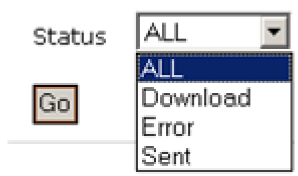
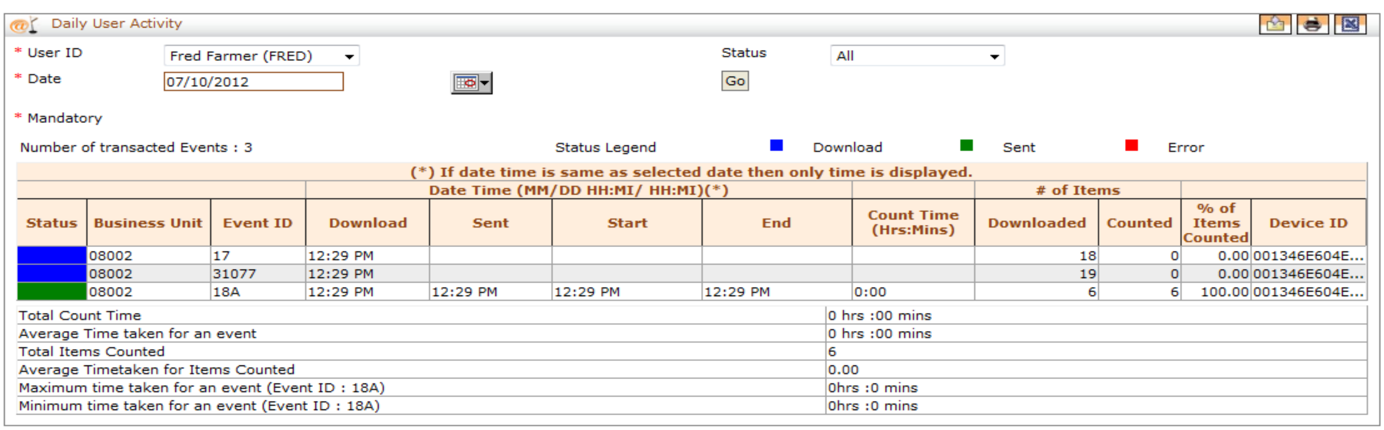


Figure 26

Then ***click*** on the Go button.

As you can see, this report breaks down, by user, the Daily Activity even further here in **Figure 27**



(*) If date time is same as selected date then only time is displayed.											
			Date Time (MM/DD HH:MI/ HH:MI)(*)					# of Items			
Status	Business Unit	Event ID	Download	Sent	Start	End	Count Time (Hrs:Mins)	Downloaded	Counted	% of Items Counted	Device ID
	08002	17	12:29 PM					18	0	0.00	001346E604E...
	08002	31077	12:29 PM					19	0	0.00	001346E604E...
	08002	18A	12:29 PM	12:29 PM	12:29 PM	12:29 PM	0:00	6	6	100.00	001346E604E...

Total Count Time	0 hrs :00 mins
Average Time taken for an event	0 hrs :00 mins
Total Items Counted	6
Average Timetaken for Items Counted	0.00
Maximum time taken for an event (Event ID : 18A)	0hrs :0 mins
Minimum time taken for an event (Event ID : 18A)	0hrs :0 mins

Figure 27

Columns and summary section are explained below.

Status – Displays whether this event is in Download, Sent, or Error status.

Business Unit – The business unit assigned to this event.

Event ID – Counting event ID

Download – Time the event is downloaded from the server.

Sent – Time the event is sent or uploaded to the server.

Start/End – Time that the first item on the event is started, through the last item on the event.

Count Time – Actual time in hours and minutes that it took to count the event.

Downloaded – Number of items on the event that was downloaded from the server.

Counted – Actually number of items that were counted on the event

% of Items counted – Calculated taking the number counted divided by the number downloaded.

Device ID – Records the HHT device that was used to count

In the summary section of the report, the information provided is:

Total Count Time – Sum of all Count Time column.

Average Time taken for Items counted – The average time it took this user to count and event on this date.

Total Items counted – Summary of Counted column.

Average Time taken for items counted – Total Count Time * 60, divided by Total Items counted.

Maximum Time taken for an event – The event id that took the greatest amount of time to count, with the time in hrs. and mins

Minimum Time taken for an event – The event id that took the least amount of time to count, with the time in hrs and mins

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Event Summary Report

Selecting this option will give you the screen shot below: **Figure 28**

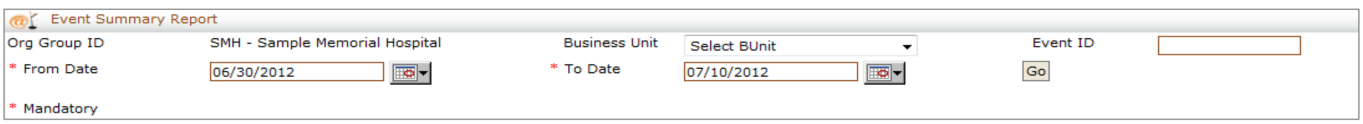
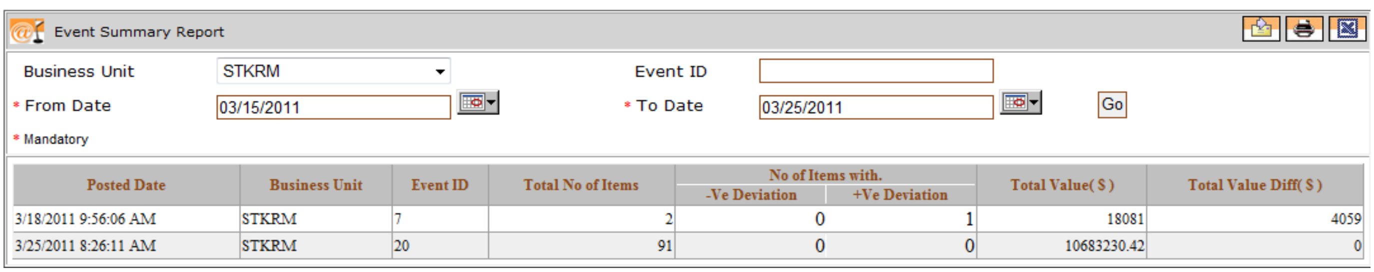


Figure 28

Select from **Business Unit, Event Id** or just a date range then click on the Go button which displays the data details as shown here in **Figure 29*.***



Posted Date	Business Unit	Event ID	Total No of Items	No of Items with. -Ve Deviation	No of Items with. +Ve Deviation	Total Value($)	Total Value Diff($)
3/18/2011 9:56:06 AM	STKRM	7	2	0	1	18081	4059
3/25/2011 8:26:11 AM	STKRM	20	91	0	0	10683230.42	0

Figure 29

Columns are explained below.

Posted Date – Date and Time the EventID is posted.

Business Unit – Event ID Business unit

Event Id – Event #

Total No of Items – Total number of items on the Event Id.

-Ve Deviation – Number of items with minus deviation.

+Ve Deviation – Number of items with plus deviation.

Total Value – This is the Total Item price value of all items on this Event.

Total Value Diff ($) – This is the Total dollar amount of items that have different values on Event.

Split Events

The **Split Events** option allows a **Web User** to split a counting event into multiple counting events.

For example, if a counting event has 2,000 items on it to be counted the **Web User** can elect to split the events so multiple HHT users can perform the counting. This will create unique **Event ID**s to be allocated to the users.

Select the **Split Events** link and ***click*** the Go button. The following screen appears **Figure 30**

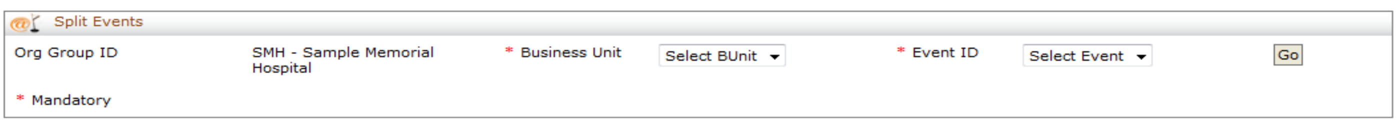


Figure 30

Select a **Business Unit** and counting **Event ID** from the respective drop down lists and **Figure 31** will display

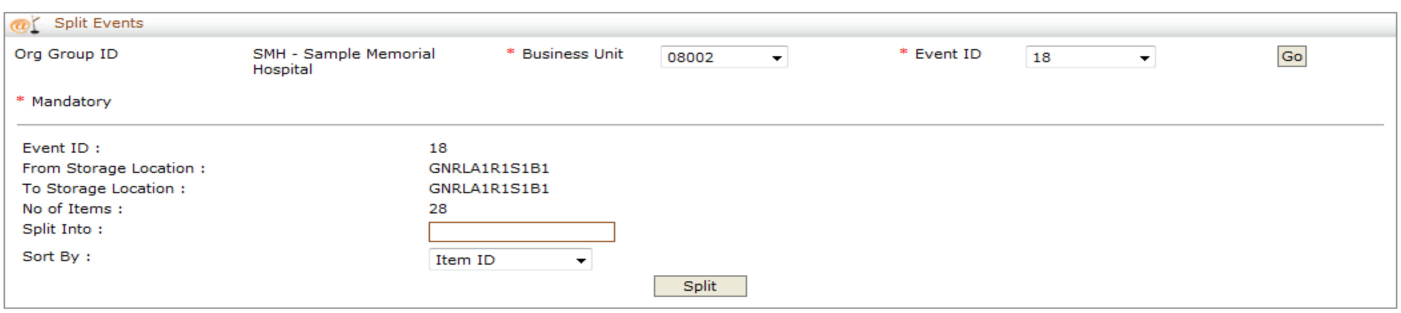


Figure 31

The screen will display the following information

Event ID: The counting event number created in the ERP.

From Storage Location: Determined by type of counting run in the ERP.

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To Storage Location: Determined by type of counting run in the ERP.

No of Items: Total number of items on original **Event ID.**

Split Into: Enter the number of events to split the event into.

Sort by: See Figure 32

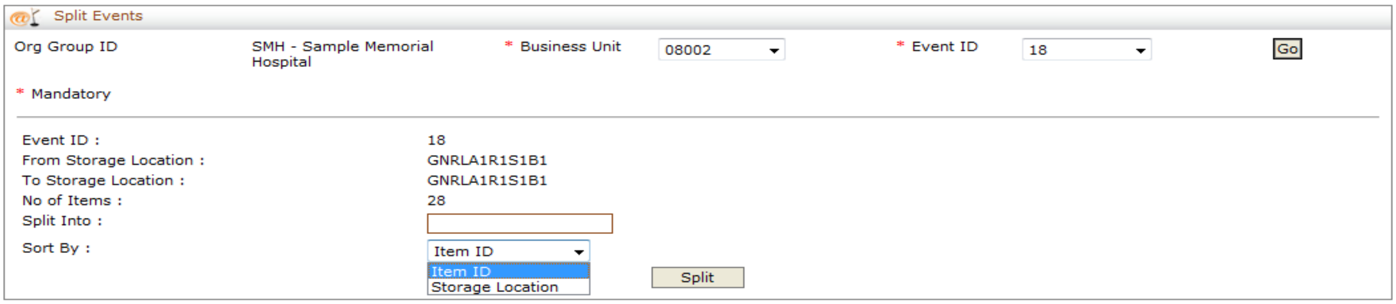

Figure 32

The split can be sorted or ordered by Item ID or Storage Location

In the example in this section, the Event will be split into 3 separate events. To do this, enter a 3 into the Split Into field.

The event has a total number of 28 items. The 3 new events will have

Click the Split button and if the process is created successfully, the following screen appears **Figure 33**

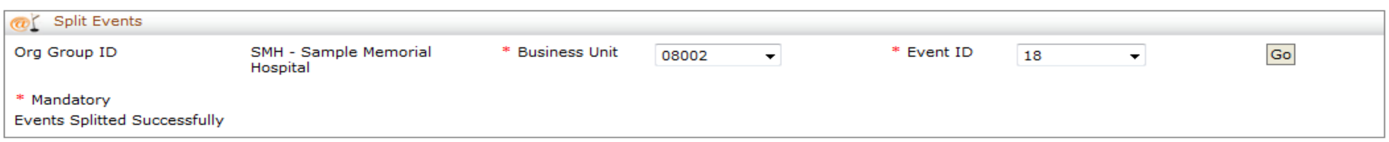

Figure 33

Click the **Allocate Events** link from the home screen and the following information will now display in **Figure 34**

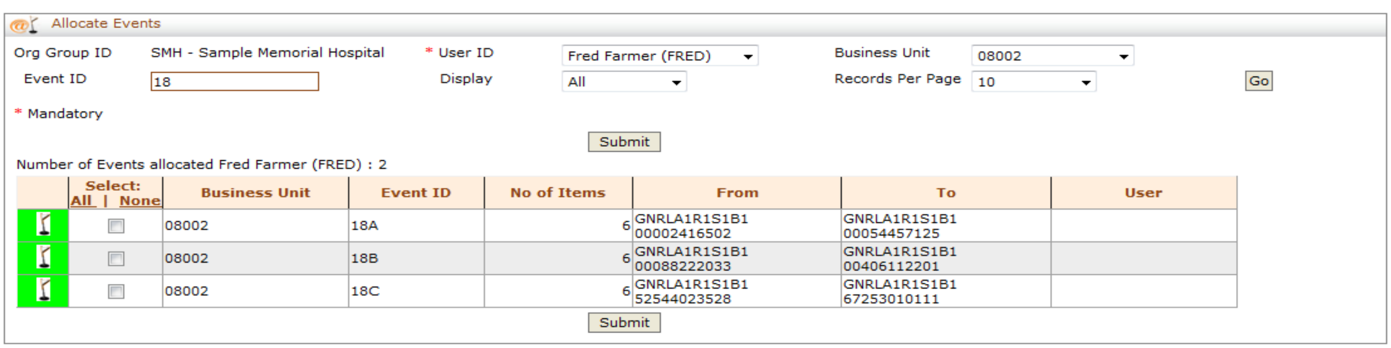

Figure 34

Enter the original Event ID to search and the screen above will appear. **Figure 34**

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The new number of Events that display are dependent on the number entered in the **"Split Into"** field on **Figure 31.** Since we entered 3 in this field it creates 3 new Event IDs – 18A, 18B, and 18C. If we had selected 5 in the field it would have created 18A, 18B, 18C, 18D, and 18E.

When the system does the calculation it will take the total number of items and divide the original total items by the value entered in the "Split Into" field. Two examples follow:

1. Original Event ID #1522 has 45 total items and we enter 5 into the Split Into field. Results
   a. 1522A – Items = 5
   b. 1522B – Items = 5
   c. 1522C – Items = 5
   d. 1522D – Items = 5
   e. 1522E – Items = 5
2. Original Event ID #1522 has 45 total items and we enter 4 into the Split Into field. Results:
   a. 1522A – Items = 12
   b. 1522B – Items = 11
   c. 1522C – Items = 11
   d. 1522D – Items = 11
3. Original Event ID #202 had 33 items and we enter 5 into the Split Into field. Results
   a. 202A – Items = 7
   b. 202B – Items = 7
   c. 202C – Items = 7
   d. 202D – Items = 6
   e. 202E – Items = 6

The Web User or Supervisor can now allocate the separate events to multiple users that will perform the counting.

NOTE: When processing split counts, the process counts must be done from the Original Event ID and sent as one Event from either the Review Counts option or the Process Counts option.

PROCESSING COUNTS WORKFLOW using Split Events

Select Process option **Figure 35**

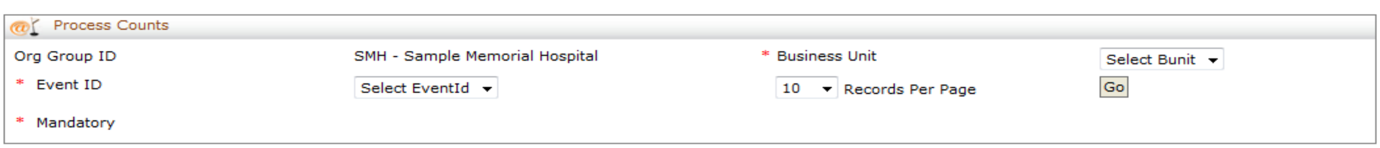

Figure 35

Select the **Business Unit** and Parent **EVENT ID** of the split events. ***Click*** the Go button **Figure 36**

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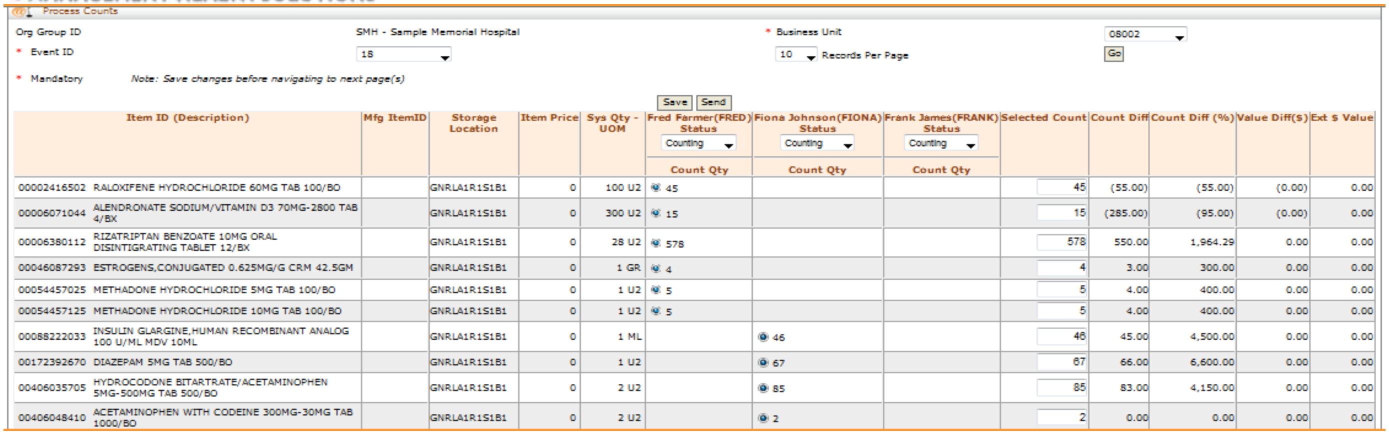


Process Counts

Org Group ID: SMH - Sample Memorial Hospital
* Business Unit: 08002
* Event ID: 18
10 Records Per Page
Go
* Mandatory
Note: Save changes before navigating to next page(s)
Save Send

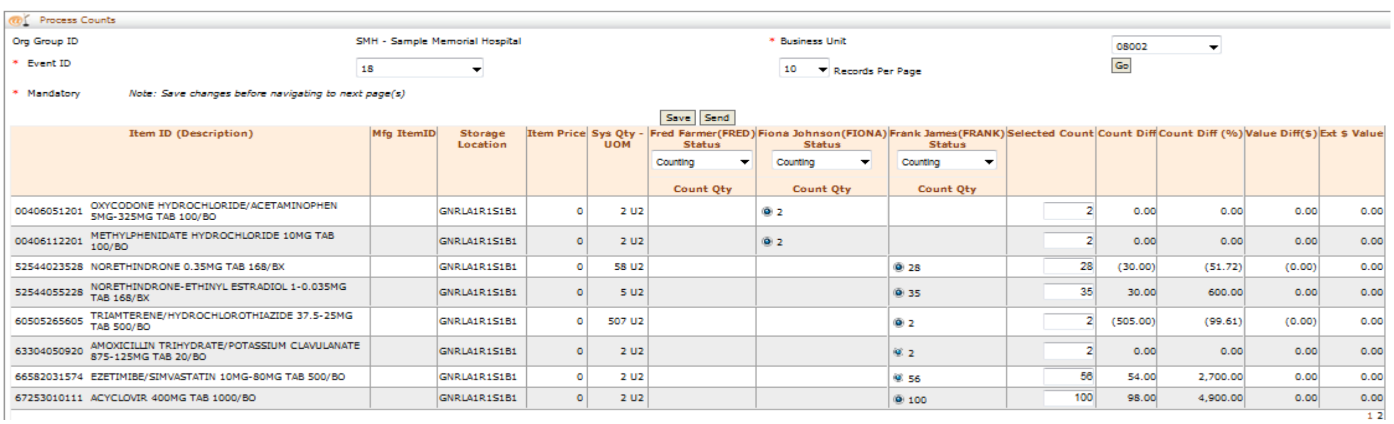
Item ID	(Description)	Mfg ItemID	Storage Location	Item Price	Sys Qty - UOM	Fred Farmer(FRED) Status: Counting — Count Qty	Fiona Johnson(FIONA) Status: Counting — Count Qty	Frank James(FRANK) Status: Counting — Count Qty	Selected Count	Count Diff	Count Diff (%)	Value Diff($)	Ext $ Value
00002416502	RALOXIFENE HYDROCHLORIDE 60MG TAB 100/BO		GNRLA1R1S1B1	0	100 U2	45			45	(55.00)	(55.00)	(0.00)	0.00
00006071044	ALENDRONATE SODIUM/VITAMIN D3 70MG-2800 TAB 4/BX		GNRLA1R1S1B1	0	300 U2	15			15	(285.00)	(95.00)	(0.00)	0.00
00006380112	RIZATRIPTAN BENZOATE 10MG ORAL DISINTIGRATING TABLET 12/BX		GNRLA1R1S1B1	0	28 U2	578			578	550.00	1,964.29	0.00	0.00
00046087293	ESTROGENS,CONJUGATED 0.625MG/G CRM 42.5GM		GNRLA1R1S1B1	0	1 GR	4			4	3.00	300.00	0.00	0.00
00054457025	METHADONE HYDROCHLORIDE 5MG TAB 100/BO		GNRLA1R1S1B1	0	1 U2	5			5	4.00	400.00	0.00	0.00
00054457125	METHADONE HYDROCHLORIDE 10MG TAB 100/BO		GNRLA1R1S1B1	0	1 U2	5			5	4.00	400.00	0.00	0.00
00088222033	INSULIN GLARGINE,HUMAN RECOMBINANT ANALOG 100 U/ML MDV 10ML		GNRLA1R1S1B1	0	1 ML		46		46	45.00	4,500.00	0.00	0.00
00172392670	DIAZEPAM 5MG TAB 500/BO		GNRLA1R1S1B1	0	1 U2		67		67	66.00	6,600.00	0.00	0.00
00406035705	HYDROCODONE BITARTRATE/ACETAMINOPHEN 5MG-500MG TAB 500/BO		GNRLA1R1S1B1	0	2 U2		85		85	83.00	4,150.00	0.00	0.00
00406048410	ACETAMINOPHEN WITH CODEINE 300MG-30MG TAB 1000/BO		GNRLA1R1S1B1	0	2 U2		2		2	0.00	0.00	0.00	0.00

Figure 36

Note on the screen that there are multiple users counting. In the respective Count QTY columns, there are radio buttons for each item. Also note, that there may be multiple pages associated with this one Event Figure 37

Figure 37

While reviewing the counts, the Web User can either select a radio button count quantity or enter another value in the "Selected Count" field. This will update the value.



Process Counts

Org Group ID: SMH - Sample Memorial Hospital
* Business Unit: 08002
* Event ID: 18
10 Records Per Page
Go
* Mandatory
Note: Save changes before navigating to next page(s)
Save Send

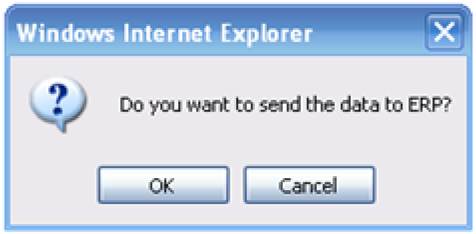
Item ID	(Description)	Mfg ItemID	Storage Location	Item Price	Sys Qty - UOM	Fred Farmer(FRED) Status: Counting — Count Qty	Fiona Johnson(FIONA) Status: Counting — Count Qty	Frank James(FRANK) Status: Counting — Count Qty	Selected Count	Count Diff	Count Diff (%)	Value Diff($)	Ext $ Value
00406051201	OXYCODONE HYDROCHLORIDE/ACETAMINOPHEN 5MG-325MG TAB 100/BO		GNRLA1R1S1B1	0	2 U2		2		2	0.00	0.00	0.00	0.00
00406112201	METHYLPHENIDATE HYDROCHLORIDE 10MG TAB 100/BO		GNRLA1R1S1B1	0	2 U2		2		2	0.00	0.00	0.00	0.00
52544023528	NORETHINDRONE 0.35MG TAB 168/BX		GNRLA1R1S1B1	0	58 U2			28	28	(30.00)	(51.72)	(0.00)	0.00
52544055228	NORETHINDRONE-ETHINYL ESTRADIOL 1-0.035MG TAB 168/BX		GNRLA1R1S1B1	0	5 U2			35	35	30.00	600.00	0.00	0.00
60505265605	TRIAMTERENE/HYDROCHLOROTHIAZIDE 37.5-25MG TAB 500/BO		GNRLA1R1S1B1	0	507 U2			2	2	(505.00)	(99.61)	(0.00)	0.00
63304050920	AMOXICILLIN TRIHYDRATE/POTASSIUM CLAVULANATE 875-125MG TAB 20/BO		GNRLA1R1S1B1	0	2 U2			2	2	0.00	0.00	0.00	0.00
66582031574	EZETIMIBE/SIMVASTATIN 10MG-80MG TAB 500/BO		GNRLA1R1S1B1	0	2 U2			56	56	54.00	2,700.00	0.00	0.00
67253010111	ACYCLOVIR 400MG TAB 1000/BO		GNRLA1R1S1B1	0	2 U2			100	100	98.00	4,900.00	0.00	0.00

1 2

After each page is reviewed, Web User must use the Save button on that specific page.

When they go to review the next page, the same process is followed.

Once all pages are reviewed and SAVED they will click the Send button.



Click the 

button to send the information to the ERP system.

Click the 

button to cancel sending data to ERP and return to the screen.

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