# User Management Guide
# Version 2.6.6

**This document is intended for use**
**By @Par Administrators and Web Users**


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

# Change Record

| Date | Author | Version | Change Reference |
|---|---|---|---|
| 6/1/2008 | R.Hatt | 2.6.5 | Initial Release |
| 1/21/2010 | R.Hatt | 2.6.5 | SP12-SP14 release |
| 2/3/2011 | R.Hatt | 2.6.6 | SP3 |
| 9/10/2012 | R.Hatt | 2.6.6 | SP5 |

# Table of Contents




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

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

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

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

# User Management

With the product release version 2.6.5 @Par has changed the User Management functionality, specifically changing the method of setting up users, user groups, and defining product access. In prior releases, administrators would simply create new web and client users, define their product access (what products they would be able to access), and define the user in a supervisor’s group.

@Par has now created a different process to further break down levels of access to include creating Organizational Groups, Managing the Org Groups, creating and managing Profiles including Menu Accessibility, and creating and managing users within Profiles.

@Par. has also provided Audit recording of all screen, menu, parameter changes made in designated products and options.

This manual will walk the @Par Administrator through all set ups required.


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

# @Par Web Login

To log into the @Par Server, you will need to use Internet Explorer with your @Par Server address. This will be provided at the time of installation of the @Par Software.

Once you link to the web you will see the following screen **Figure 1*.***

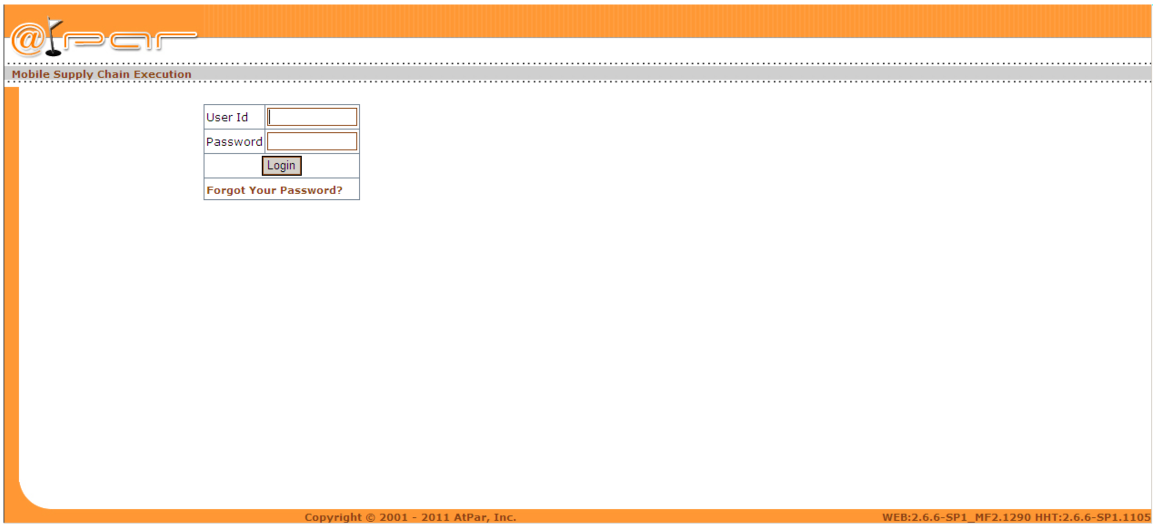



**Figure 1**

Type in the @Par Administrator User Id and Password then ***click*** the 

button.

If you attempt to log in with an invalid User ID or password the following message appears **Figure 2*.***

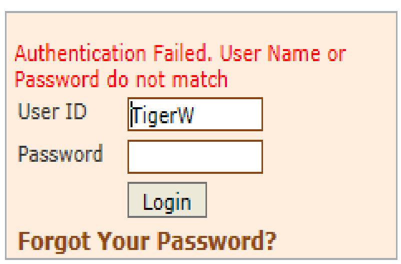



**Figure 2**

Tthe @Par Administrator may have to add or change the log in information for effected users.

Once the @Par Administrator has logged in successfully, the screen in **Figure 3** will be displayed.


**Figure 3**

For existing customers, you will notice a difference in the screen from previous versions. With this release there is only one menu function/link…… **Atpar**

To easily identify the version for both @Par Web and @Par Hand Held Terminal (HHT) devices the information is displayed in the bottom right hand corner of the screen.

The section under **Client Installables** on the right side of the screen seen below in **Figure 4** is discussed in detail in the **@Par Handheld User Guide** document.

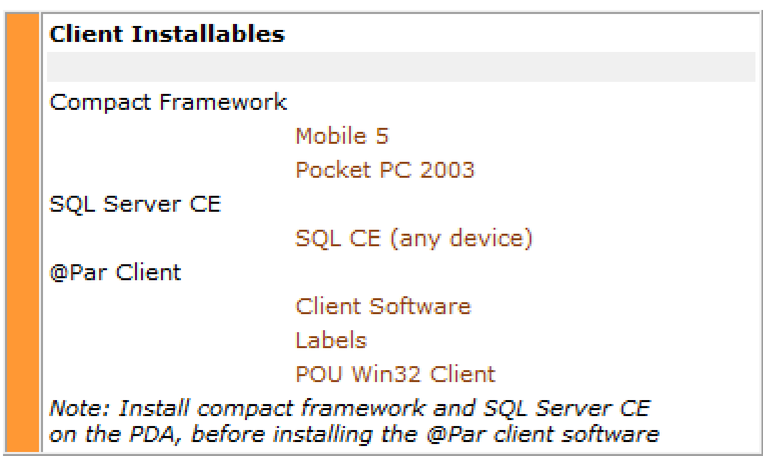



**Figure 4**

***Click*** on the **Atpar** link and **Figure 5** will display.


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

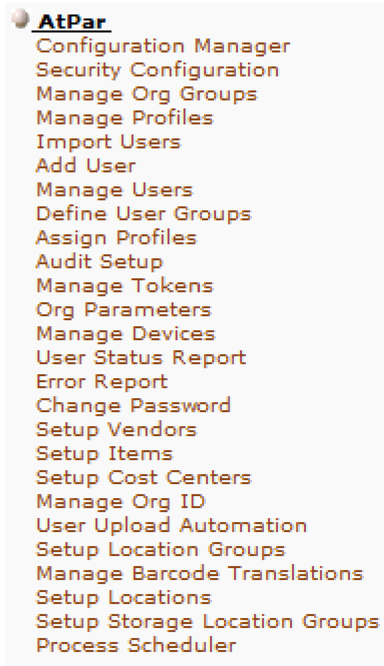



**Figure 5**

All menu options will be discussed in detail later in this document. With this version, the @Par Administrator will also have the ability to change the order of the Menus in appearance.

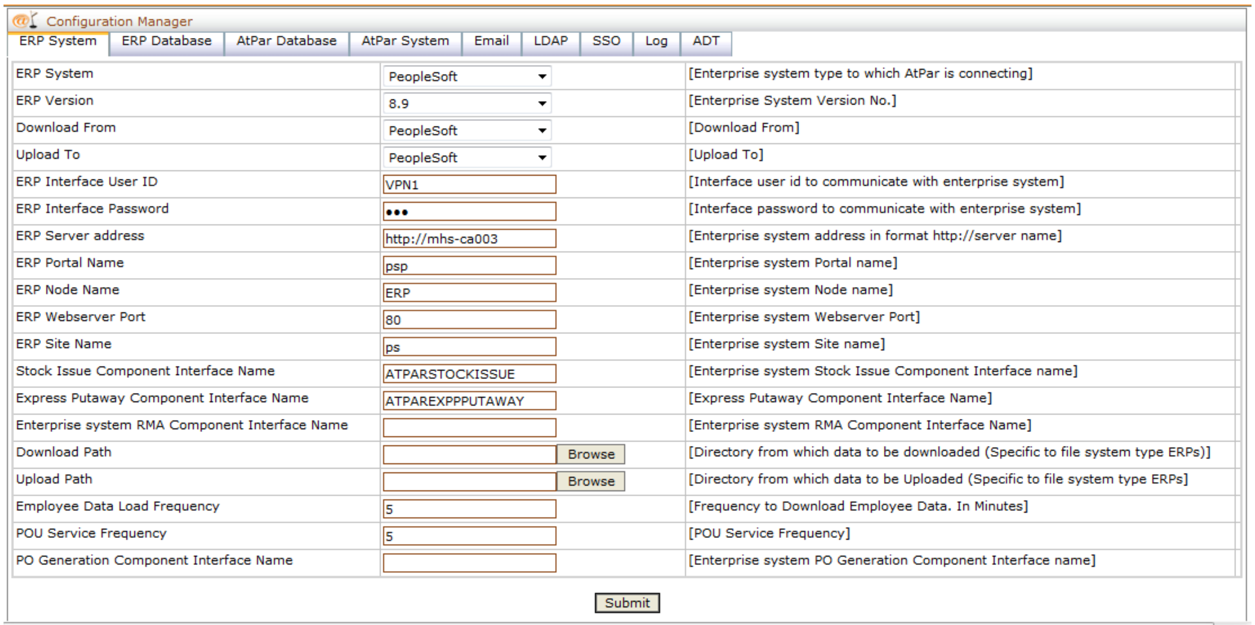
For example, the @Par Administrator could move Configuration Manager and Security Configuration to the bottom of the view. This capability is true of all Web Product menu options.

# Configuration Manager

The Configuration Manager is where the setup of your Enterprise System (ERP), ERP database, AtPar Middle Tier Database, AtPar System, Email, LDAP, SSO, Log, and ADT are setup and stored. Prior to the @Par software working with your ERP system, all required sections will have to be completed.

**NOTE: Changes to any section should NOT be done without first contacting @Par Support**

### ERP System – Figure 6


Configuration Manager

ERP System | ERP Database | AtPar Database | AtPar System | Email | LDAP | SSO | Log | ADT

| | | |
|---|---|---|
| ERP System | PeopleSoft | [Enterprise system type to which AtPar is connecting] |
| ERP Version | 8.9 | [Enterprise System Version No.] |
| Download From | PeopleSoft | [Download From] |
| Upload To | PeopleSoft | [Upload To] |
| ERP Interface User ID | VPN1 | [Interface user id to communicate with enterprise system] |
| ERP Interface Password | ••• | [Interface password to communicate with enterprise system] |
| ERP Server address | http://mhs-ca003 | [Enterprise system address in format http://server name] |
| ERP Portal Name | psp | [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] |
| Express Putaway Component Interface Name | ATPAREXPPPUTAWAY | [Express Putaway Component Interface Name] |
| Enterprise system RMA Component Interface Name | | [Enterprise system RMA Component Interface Name] |
| Download Path | Browse | [Directory from which data to be downloaded (Specific to file system type ERPs)] |
| Upload Path | Browse | [Directory from which data to be Uploaded (Specific to file system type ERPs] |
| Employee Data Load Frequency | 5 | [Frequency to Download Employee Data. In Minutes] |
| POU Service Frequency | 5 | [POU Service Frequency] |
| PO Generation Component Interface Name | | [Enterprise system PO Generation Component Interface name] |

Submit

**Figure 6**

The ERP System Details section is required to identify which ERP system your organization has. For Example, PeopleSoft, Lawson, Meditech, etc. The Configuration Manager's options may be different based on ERP System Type.

If your ERP system is PeopleSoft then you simply select PeopleSoft from the Enterprise System drop down list.

Once all fields are entered ***click*** the Submit button to save information.

***Click*** the ERP Database tab next. **Figure 7**

## *ERP Database Details*

This section will require more detail and is required for the @Par software to communicate with the ERP system.

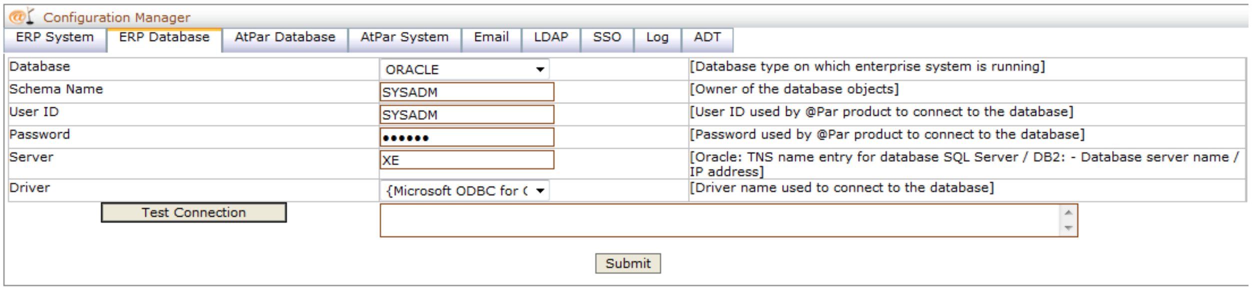



**Figure 7**

**Database –** The type of Database the ERP system has. For example: Oracle, MS-SQL, DB2. This example shows ORACLE.

**Schema name –** Owner of the database's objects

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

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

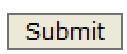
**Server** – For Oracle this is the TNS name entry for the production/test database. For SQL Server/DB2 this is the database server name or IP Address.

**Driver Name** – Driver type used to connect to the database.

- ***Click*** this button to test the database connection after all entries are finished.

**NOTE: For MS-SQL and DB2 databases the following option would be required:**

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

Once all fields are entered ***click*** the 

button to save information.

***Click*** the AtPar Database tab next. **Figure 8**

### *AtPar Database*

This section is also required.  This will hold the information regarding the @Par Middle Tier Database, used to store User information, Cart Allocations, Transactional data for Reports, etc.

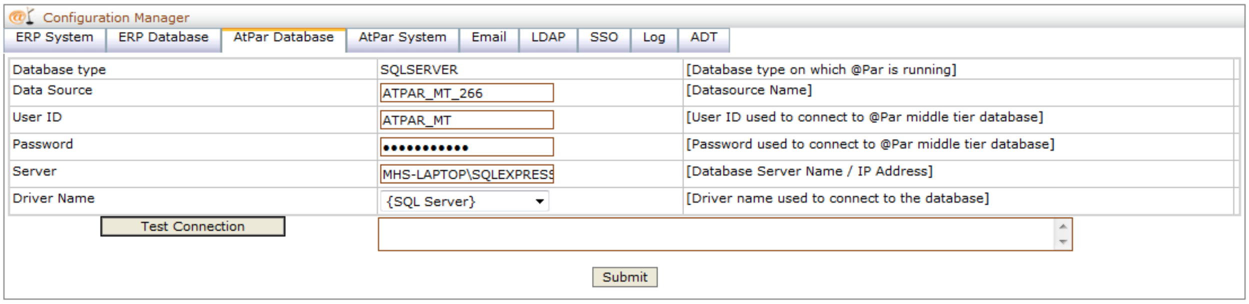



**Figure 8**

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

**Data Source – AtPar** Database name

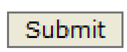
**User ID –** User ID used to connect to **AtPar** middle tier database.

**Password** – Password used to connect to **AtPar** 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 – AtPar** Database server name or IP Address

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

- ***Click*** this button to test the database connection.

Once all fields are entered ***click*** the 

button to save information.

***Click*** on the AtPar System tab **Figure 9.**

### *AtPar System*

If the organization is using the Recall services, the check box parameter below must be checked. **Figure 9**

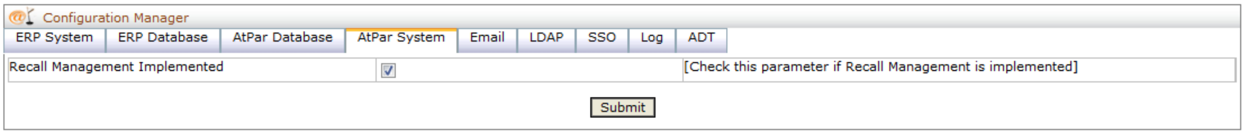
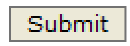



**Figure 9**

Recall of Lot Number can be maintained in both @Par POU and @Par Receiving products.

Once the parameter is checked or unchecked ***click*** the 

button to save information

***Click*** on the Email tab **Figure 10*.***

## *Email*

Reports in all of @Par products have the ability to be emailed to other users. If your organization wants to have this capability, this section must be completed. Your IT department should be able to assist the @Par Administrator in completing the section with correct information.

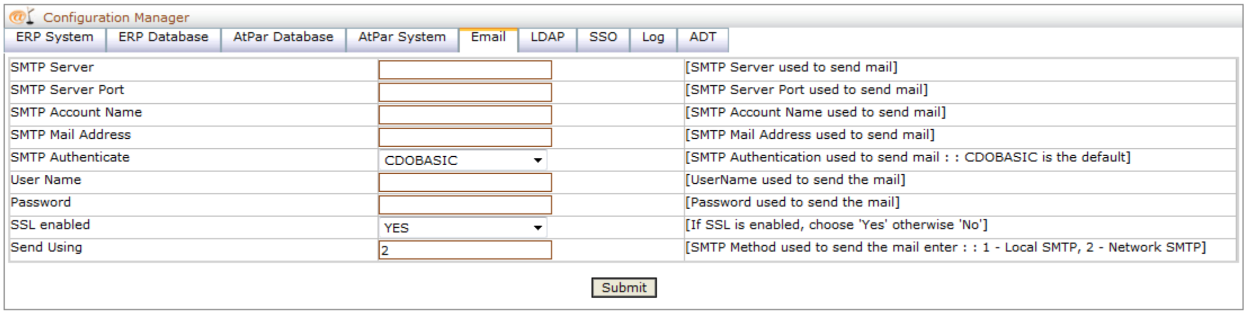



**Figure 10**

**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 list used to select the SMTP Authentication used to send mail.

**User Name –** User Name used to send mail.

**Password –** User Password used to send mail.

**SSL enabled –** 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.

Once all fields are entered ***click*** the Submit button to save information.

***Click*** the LDAP tab **Figure 11**

## *LDAP*

@Par supports mixed mode authentication of users (native or LDAP). Users defined within the @Par system can be either @Par Native users or previously imported LDAP users.

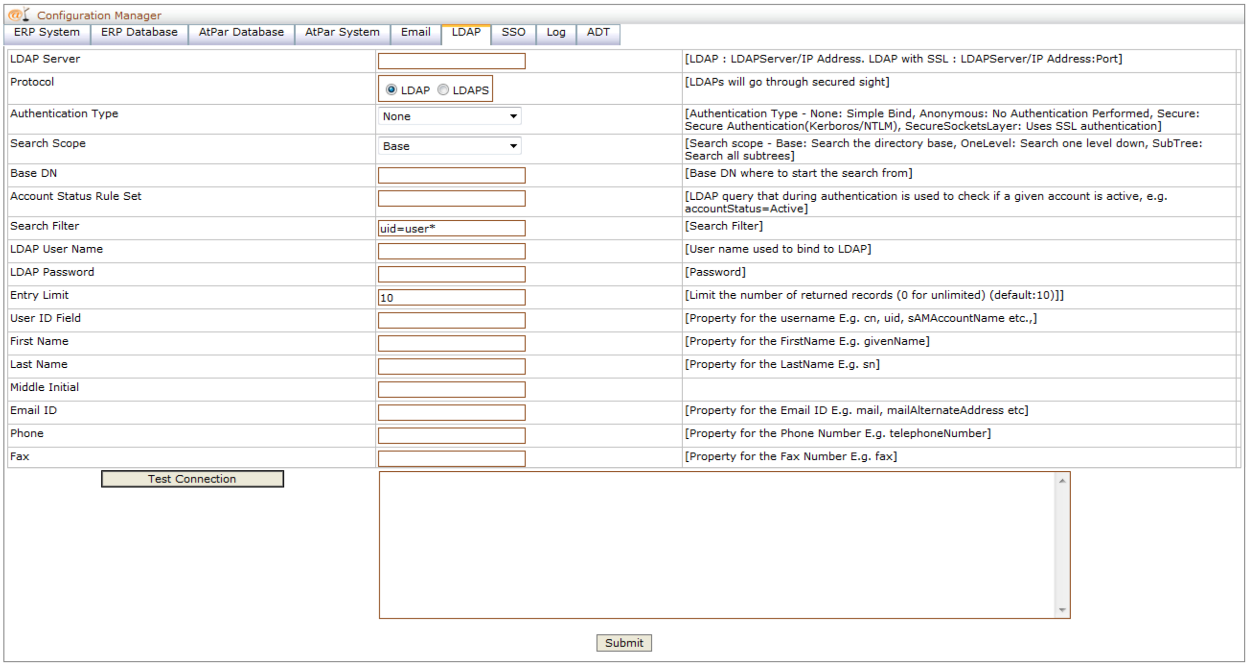



**Figure 11**

**LDAP Server -** FQDN or IP address of the directory server.

**Protocol –** LDAP or LDAPS

**Authentication Type -** recommended leave the default (SimpleBind)

**Search Scope -** recommended leave the default (Subtree)

**Base DN -** DN from where the system will begin the search. For example, OU=People, DC=companyname, DC=com

**Account Status Rule Set –** LDAP query that during authentication is used to check if a given account is active, e.g. accountStatus=Active

**Search Filter -** This filter determines what data is returned from the server. The filter uses the Microsoft Dotnet platform's System.DirectoryServices DirectorySearcher.Filter property.
e.g The syntax to match all user id's would be: uid=*
e.g The syntax to match all users belonging to a particular group would be :
(|(&(objectclass=inetOrgPerson)(uid=*))(&(objectclass=group)(cn=groupname)))

For more information about the LDAP search string format, see "Search Filter Syntax" in the MSDN Library at [http://msdn.microsoft.com/library](http://msdn.microsoft.com/library)

**LDAP UserName -** This field should contain the specific UserDN assigned for @Par that has been given permissions to query the directory server.

**LDAP Password -** Password for the LDAP user.

**Entry Limit -** This field limits the number of entries returned by the LDAP server for the given search query. If you have a very large number of entries returned you may want to reduce this number to be able to view a smaller number of entries in the Import User Screen.

**User Mapping Fields:**

These fields are used to map ldap attributes to @Par user definition fields.

- **User ID Field (required) -** this LDAP attribute will become the actual Userid a user will use to login to @Par. E.g. cn, uid, sAMAccountName
- **First Name (required) -** this attribute will be used as the @Par user's firstname. E.g. givenName
- **Last Name (required) -** this attribute will be used as the @Par user's lastname. E.g. sn
- **Middle Initial –** Middle Initial
- **Email ID -** Property for the Email ID e.g. mail, mailAlternateAddress etc
- **Phone -** Property for the Phone Number e.g. telephoneNumber
- **Fax –** Property for the Fax Number e.g. fax
- **Last Name (required) -** this attribute will be used as the @Par user's lastname. e.g. sn

Once information is completed, click on the [Test Connection] button to test the LDAP configuration.

If the provided data is valid the output will be shown in the result field. The output will typically contain a table containing the data for the attributes specified in the User Mapping Fields.

If the returned data looks correct, ***click*** the [Submit] button to save information.

## Steps for importing LDAP users into @Par

Once you have successfully configured and tested the LDAP configuration data. You can go to the Manage User\Import Users screen to try and import the users.

The import user's screen will run an ad-hoc query on the LDAP server to retrieve users based on the LDAP Configuration data. The screen will show the list of users that have not already been imported into @Par.

Along with the User Mapping Fields, the table also contains a 'UserDN' field which is used later during authentication.

To import a user, select a single or multiple entries, and hit the Import User button. This will open up a dialog box and request you to enter a few fields required by @Par to create a valid @Par user.<<details>>

Once a user has been imported into @Par, the user will be marked as a LDAP user. This flag causes all authentication requests by that user to defer to LDAP for authentication.

### Authenticating against LDAP

When an ldap user has been imported into @Par, any authentication requests for that user id will be routed to the directory server.

The authentication process (for Handheld Client or Web Client) is roughly the following:

Send credentials (userid/encrypted password) to the @Par server.

If the user is defined as an ldap user within @Par, use the previously stored UserDN and the provided password to make a bind request to the directory server using those credentials.

If the directory server successfully authenticates, continue checking other @Par specific rule sets and on success return a token to the client.

In addition to the bind request @Par can also be configured to check the status of the user on LDAP using the Account Status Rule Set (LDAP Configuration screen). This field is typically specified as such: accountStatus=active

When making the bind request, @Par will also include this as a part of the search filter, and only users who's status is active within LDAP will be allowed access.

Organizations can use this field to prevent @Par access to users, based on customer security policies.

***Click*** the SSO tab **Figure 12**


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

## *SSO*

**Single sign-on (SSO)** is a session/user authentication process that permits a user to enter one name and password in order to access multiple applications. The process authenticates the user for all the applications they have been given rights to and eliminates further prompts when they switch applications during a particular session.

One example of this is Google accounts. Once you login to your G-Talk account, you can reach directly to your G-Mail or Orkut home page (by passing the login page). You will not be asked to enter your login credentials again. This is an example of Web Single sign on.

Similarly, there is software installed on your system - @Par, SQL server and another application ABC. All three have their own login pages and user is supposed to provide his/her credentials to log in. But with single sign on, once the user logs into the system, automatically he logs into all the other applications too. When the user ***clicks*** on @Par short cut link, he/she will be directly taken to the @Par – Dashboard (Home) page. When he logs out he will be redirected to the Login page of the Single Sign on application, instead of usual @par Login page.

Below are the parameters to be provided for @Par application to function in accordance with SSO strategy

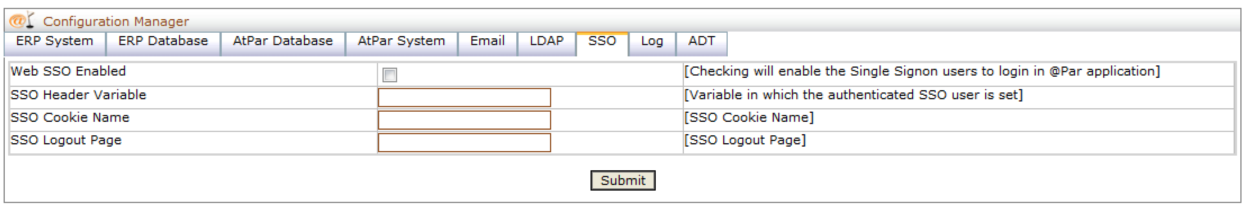



**Figure 12**

If any clarification is needed have your IT Department or @Par Administrator contact @Par Support.

Once all fields are entered ***click*** the Submit button to save information.

***Click*** the LOG tab **Figure 13**

## *Log*

The Log tab is used to create logs for any errors that occur with the @Par software/products.

The log capture or type can be configured with the various settings in **Figure 13**

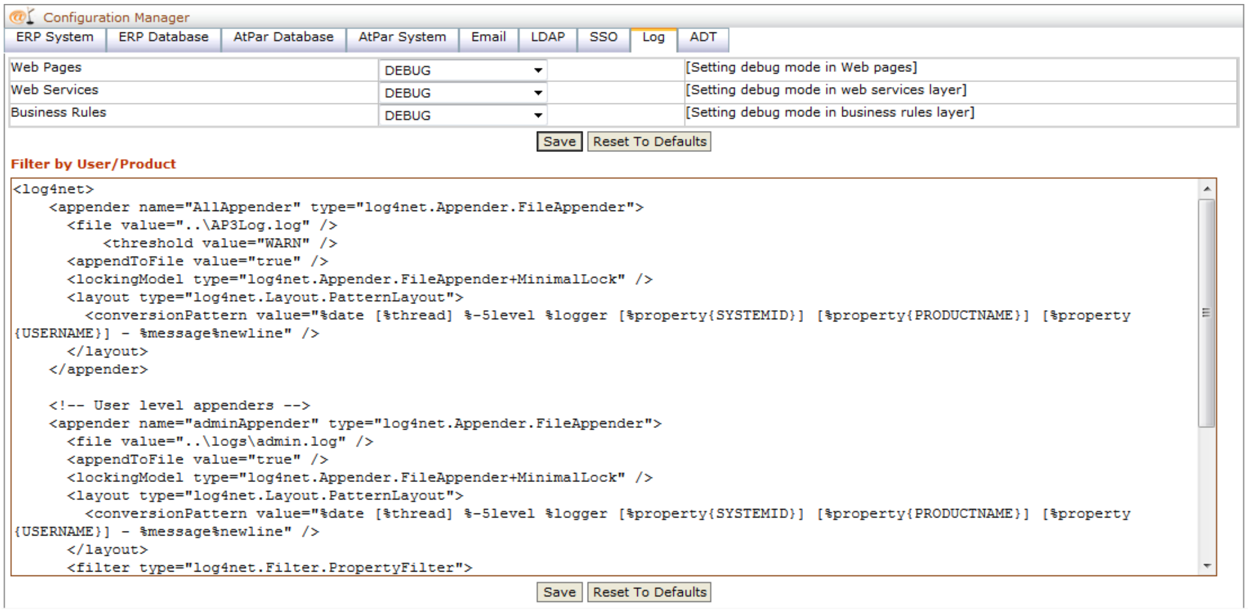



**Figure 13**

To set log files, use the drop down list next to Web pages, Web Services, or Business Rules. Generally you will select Web Pages.

Options available are DEBUG and WARN

DEBUG – Provides detailed information of the error which will capture all operations
WARN – Warning will provide limited information, summary format

To capture log files for troubleshooting issues with @Par, select DEBUG and modify the line
<threshold value="WARN" /> to <threshold value="DEBUG" />

***Click*** the Save button on the bottom of this screen.

This will write the ApLog3.log so it can be sent to @Par Support for analysis. When the log file is complete, return to this screen to ***click*** the Reset To Defaults button on the bottom of the screen

**NOTE: It is VERY important to do this as the log file will continue to grow and may cause the system slow down issues or failure.**

***Click*** the ADT tab **Figure 14**

## *ADT*

For organizations using ADT patient billing information, the ADT fields and parameters will be required.

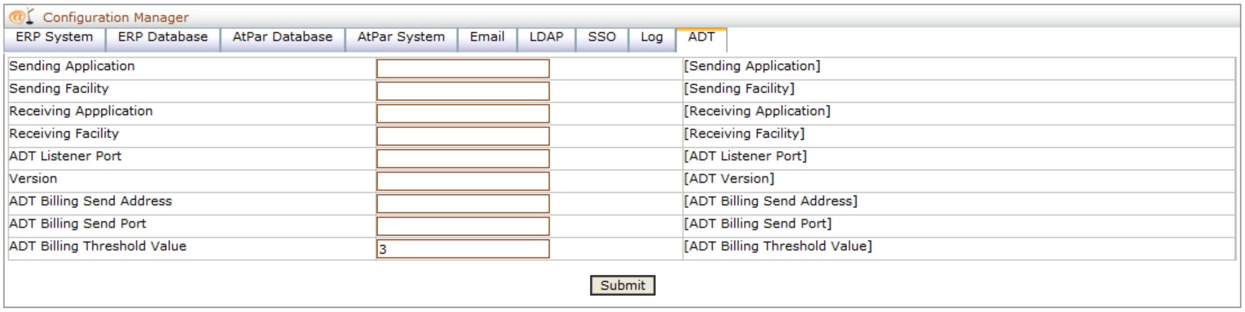



**Figure 14**

**Sending Application –**

**Sending Facility –**

**Receiving Facility –**

**ADT Listener Port –**

**Version –**

**ADT Billing Send Address –**

**ADT Billing Send Port –**

**ADT Billing Threshold value -**


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

# Security Configuration

This allows @Par Administrators to further define user passwords, as well as set more defined parameters. ***Click*** on this option and the following screen appears: **Figure 15**

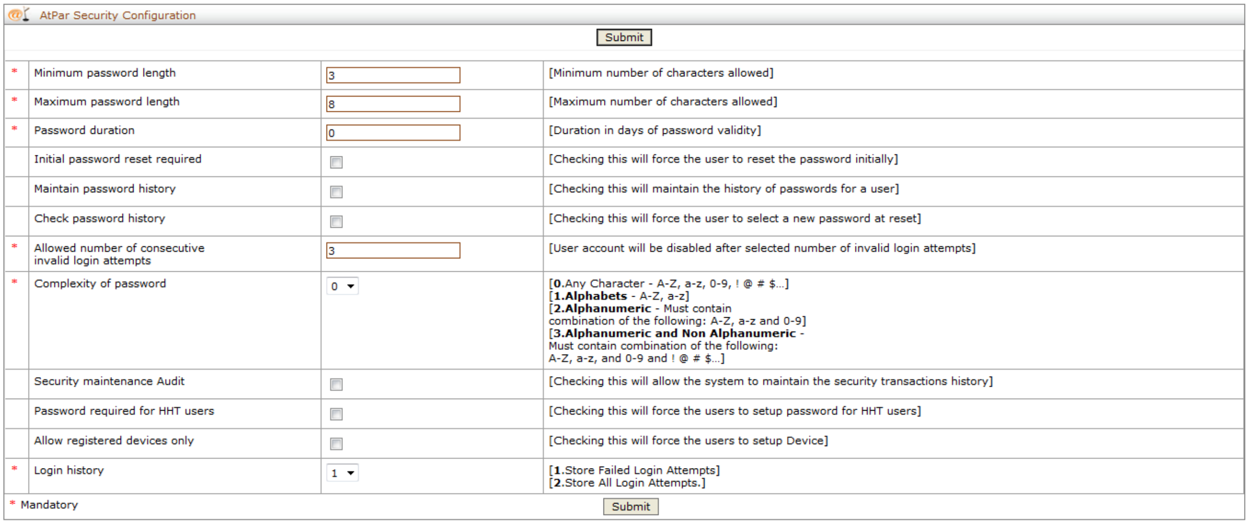



**Figure 15**

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

**Initial password reset required** – Checking this box will force the user to initially change the password when first logging in.

**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.

**Password required for HHT Users –** Checking this box will require HHT users to enter a password on the HHT

**Allow registered devices only –** Checking this box will require that all devices must be registered prior to use.

The Web/@Par Administrator will have to register each device in the **Manage Devices** section

**Login History –** Select option to capture Failed login attempts only or all login attempts

When you have completed setting up the parameters ***click*** the Submit button to save information.

# Manage Org Groups

First phase of user management for profiles and users is the manage Org Groups. This section will show you how to add and manage the highest level of user management, the Organization Group/s. Select this link from the @Par server and you will receive the screen in **Figure 16**

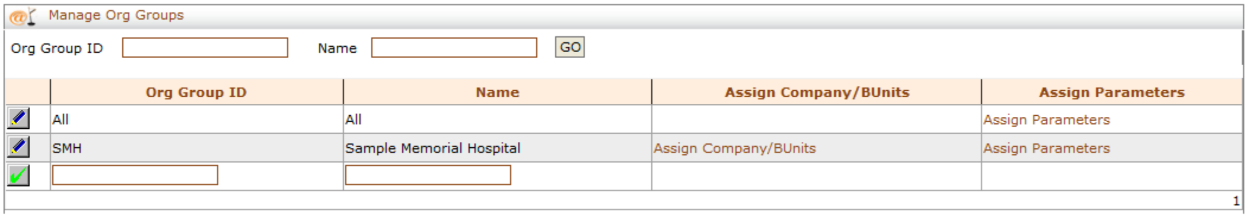



**Figure 16**

## *Add a new Org Group*

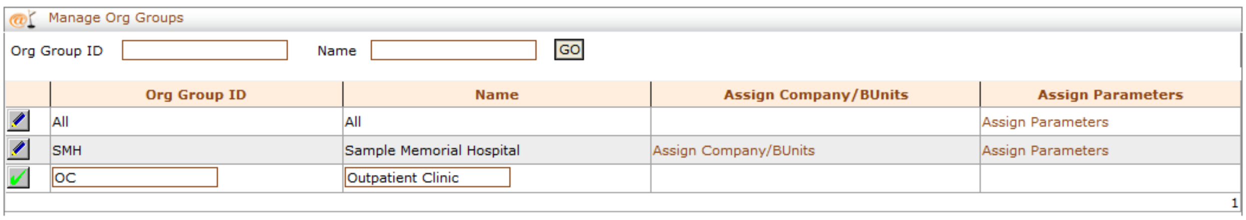



**Figure 17**

To add a new Org Group ID, enter a unique Org Group ID to use by typing in the name of the Org Group, and ***click*** on the icon. **Figure 17**

The screen will change to allow you to assign Company/Business Units and Parameters **Figure 18**


**Figure 18**

## *Edit or Delete an Org Group*

***Click*** on the icon. You will receive the following screen **Figure 19**.

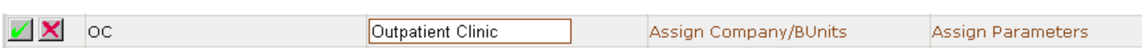



**Figure 19**

The user may edit the Org Group name only. If it is required to rename an existing Org Group make the change here and ***click*** the icon to save the change.

If the user wishes to delete the change then they need to ***click*** on the icon.

## *Assign Company/BUnits*


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

For each unique Org Group, Company or Business Units information must be assigned before moving to the next phase of User Management.

***Click*** on the Assign Company/BUnits link and you will see the following screen **Figure 20**

Manage Org Group Business Units

Assign

| | Business Unit | Description | Business Unit Type | Select: All \| None |
|---|---|---|---|---|
| | 03500 | Program Offices | Purchasing | ☑ |
| | 08002 | Irvine Med Center MM | Inventory | ☑ |
| | 08003 | Anaheim Med Center MM | Inventory | ☑ |
| | 08004 | Barcelona Warehouse MM | Inventory | ☑ |
| | 08501 | Irvine Materials | Purchasing | ☑ |
| | 08001 | Regional Lab - Sherman Way | Inventory | ☐ |
| | 08005 | Baldwin Park Med Center MM | Inventory | ☐ |
| | 08006 | South Bay Med Center MM | Inventory | ☐ |
| | 08007 | Normandie South Warehouse MM | Inventory | ☐ |
| | 08008 | Bellflower Med Center MM | Inventory | ☐ |
| | 08010 | Kern County Warehouse MM | Inventory | ☐ |
| | 08011 | Woodland Hills Med Center MM | Inventory | ☐ |
| | 08012 | Panorama Med Center MM | Inventory | ☐ |

**Figure 20**

***Select*** respective Business Unit/s by ***clicking*** in the check box and when finished selecting all business units ***click*** the ASSIGN button. Note that there are distinct Business Unit Types of Inventory and Purchasing.

When finished, **click** the X and return to the previous menu.

**NOTE: The same icons are in most submenu windows. Used to Minimize Screen, Maximize screen, Close screen.**

## *Assign Parameters*

All @Par products have global parameters, called Org Group Parameters. The parameters are used by Web/@Par Administrators to select options available in @Par, based on the organization's business rules. The parameters are required for ORG Groups and can be setup here or later in the **Org Group Parameters** section.

To setup here, ***click*** the Assign Parameters link from **Figure 18** and the following screen will display **Figure 21**

Manage Org Group Parameters

Products Select one

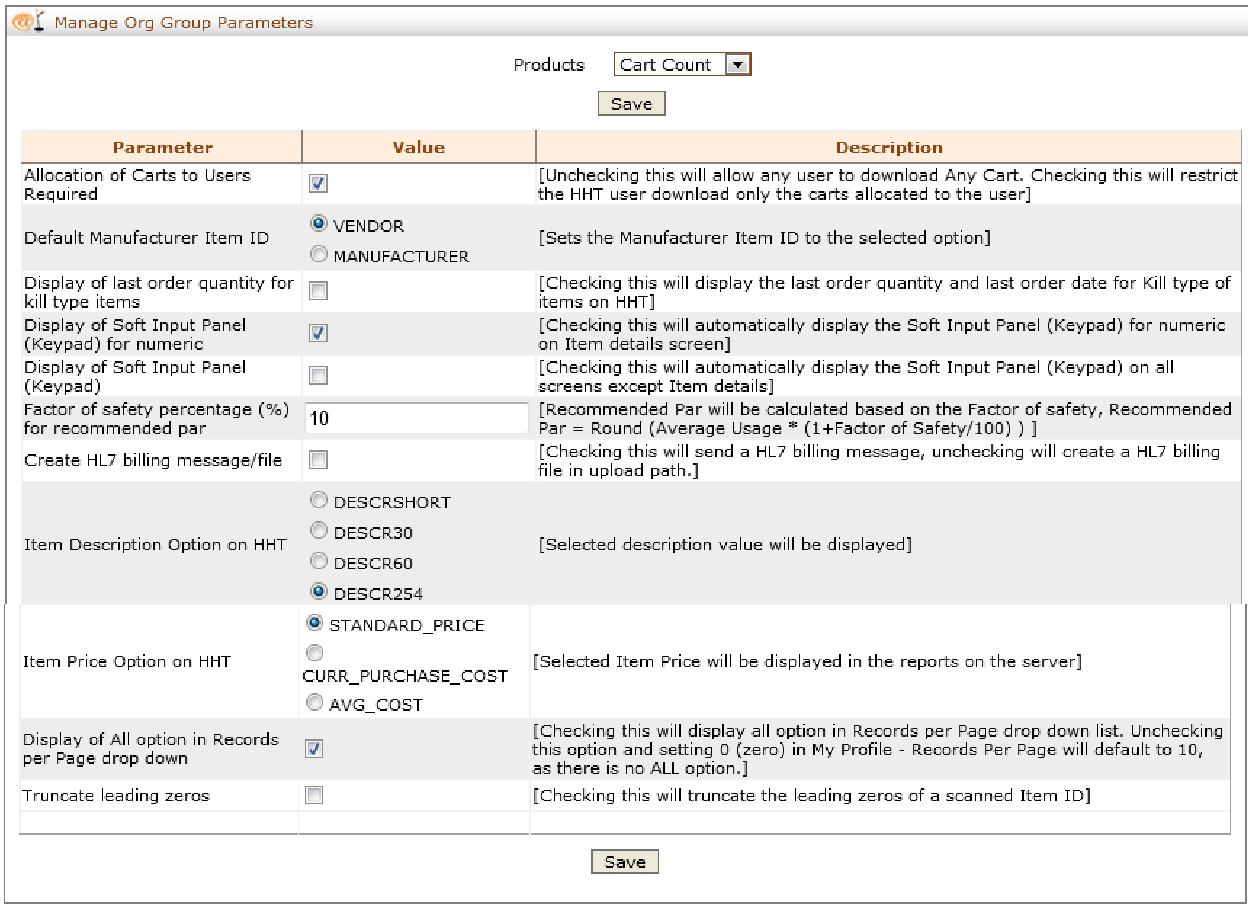
**Figure 21**

Use the drop down list and all products installed at the organization will appear.

***Highlight*** the product to be set up***.***

***Selecting*** Cart Count from the drop down list will display the following screen **Figure 22**

**Cart Count – Org Group Parameters:**



Manage Org Group Parameters

Products Cart Count

Save

| Parameter | Value | Description |
|---|---|---|
| Allocation of Carts to Users Required | ☑ | [Unchecking this will allow any user to download Any Cart. Checking this will restrict the HHT user download only the carts allocated to the user] |
| Default Manufacturer Item ID | ◉ VENDOR ○ MANUFACTURER | [Sets the Manufacturer Item ID to the selected option] |
| Display of last order quantity for kill type items | ☐ | [Checking this will display the last order quantity and last order date for Kill type of items on HHT] |
| 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] |
| Factor of safety percentage (%) for recommended par | 10 | [Recommended Par will be calculated based on the Factor of safety, Recommended Par = Round (Average Usage * (1+Factor of Safety/100) ) ] |
| Create HL7 billing message/file | ☐ | [Checking this will send a HL7 billing message, unchecking will create a HL7 billing file in upload path.] |
| Item Description Option on HHT | ○ DESCRSHORT ○ DESCR30 ○ DESCR60 ◉ DESCR254 | [Selected description value will be displayed] |
| Item Price Option on HHT | ◉ STANDARD_PRICE ○ CURR_PURCHASE_COST ○ AVG_COST | [Selected Item Price will be displayed in the reports on the server] |
| Display of All option in Records per Page drop down | ☑ | [Checking this will display all option in Records per Page drop down list. Unchecking this option and setting 0 (zero) in My Profile - Records Per Page will default to 10, as there is no ALL option.] |
| Truncate leading zeros | ☐ | [Checking this will truncate the leading zeros of a scanned Item ID] |

Save

**Figure 22**

**Allocation of Carts to Users Required** – Default value with a check in this box requires that allocation of Carts/Par Locations must be done before a user can download information. It is recommended to keep this checked to allow users to download only allocated carts.

**Default Manufacturer Item ID** – Sets the Manufacturer Item ID that appears on the HHT to either Vendor or Manufacturer.

**Display of last order quantity for kill type items -** Checking this will display the last order quantity and last order date for Kill type of items on HHT

**Display of Soft Input Panel (Keypad) for numeric –** Displays only a numeric keypad on HHT

**Display of Soft Input Panel (Keypad) –** Displays alphanumeric keypad on HHT

**Factor of safety percentage (%) for recommended Par –** Recommended Par will be calculated based on the Factor of safety, Recommended Par = Round (Average Usage * (1+Factor of Safety/100) – This factor is used on the Par Optimization Report.

**Create HL7/Billing message file –** If your organization requires Billing information and has been set up with Par Management, select this option which allows @Par to send data to your Billing system**.**

**Item Description Option on HHT** – Used to select the Item description type which appears on the HHT.

**Item Price Option on HHT –** The item price will display on Web reports.

**Display All Option in Records Per Page drop down –** Checking this option will allow Web User the User the ability to display ALL available records. Unchecked will default with 10

**Truncate leading zeroes -** Check this to truncate the leading zeroes of the item id

After you have finished all Parameters, ***click*** on the Save button.

**Par Management with Cart Count – Group Parameters:**

If your organization has Par Management with Cart Count, the Org Parameters will be as below in **Figure 23**

Manage Org Group Parameters

Products: Cart Count

Save

| Parameter | Value | Description |
|---|---|---|
| Calculate Request qty based on Fill/Kill | ☐ | [Checking this will force to calculate request quantity based on Fill/Kill flag] |
| Allocation of Carts to Users Required | ☑ | [Unchecking this will allow any user to download Any Cart. Checking this will restrict the HHT user download only the carts allocated to the user] |
| Carts are managed in AtPar | ☑ | [Checking this will retrieve Carts from Local AtPar System] |
| Co-ordinator Email ID for Consign Item Requisition | | [[Email ID(s)* to send the Consign Item error file while posting data to ERP]] |
| Co-ordinator Email ID for Non Stock Requisition | | [[Email ID(s)* to send the Non Stock error file while posting data to ERP]] |
| Co-ordinator Email ID for Stock Requisition | | [[Email ID(s)* to send the Stock error file while posting data to ERP]] |
| Co-ordinator Email ID for StockLess Item Requisition | | [[Email ID(s)* to send the StockLess Item error file while posting data to ERP]] |
| Default Manufacturer Item ID | ◉ VENDOR ○ MANUFACTURER | [Sets the Manufacturer Item ID to the selected option] |
| 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] |
| Factor of safety percentage (%) for recommended par | | [Recommended Par will be calculated based on the Factor of safety, Recommended Par = Round (Average Usage * (1+Factor of Safety/100))] |
| Generates a Pick Plan for Stock Items | ☐ | [Checking this will generate a Pick Plan for Stock Items counted at each location.] |
| Create HL7 billing message/file | ☑ | [[Checking this will send a HL7 billing message, unchecking will create a HL7 billing file in upload path.]] |
| Item Description Option on HHT | ○ DESCRSHORT<br>○ DESCR30<br>○ DESCR60<br>◉ DESCR254 | [Selected description value will be displayed] |
| Item Price Option on HHT | ◉ STANDARD_PRICE<br>○ CURR_PURCHASE_COST<br>○ AVG_COST | [Selected Item Price will be displayed in the reports on the server] |
| Coordinator Email Id | admin@numbersonly.co.ir | [Coordinator EmailId] |
| Order Qty Rounding Option | ◉ Floor<br>○ Ceil | [Selected rounding option will be used to calculate the order qty] |
| Requestor | | [A requestor is the person, department or function that enters a requisition] |
| Truncate leading zeros | ☐ | [Checking this will truncate the leading zeros of a scanned Item ID] |
| | | |
| | Save | |

**Figure 23**

**Calculate Request qty based on Fill/Kill –** Check to calculate the request qty based on the Fill/Kill being flagged. Fill/Kill is a setting on items that are on a par location. This setting determines if there will be backorders for items. If checked, there will be NO BACKORDERS created, as the item must be completed. If the order is not fulfilled and the Vendor would normally create a backorder for the item, then the item would be "KILLED" if marked as such.

**Allocation of Carts to Users Required** – Default value with a check in this box requires that allocation of Carts/Par Locations must be done before a user can download information. It is recommended to keep this checked to allow users to download only allocated carts.

**Carts are managed in @Par –** Checking this will require all Carts/Par Locations are maintained from within the @Par System.

**Co-ordinator Email ID for Consign Item Requisition –** This is the email ID of the person to receive an email when an error occurs in the posting of Consignment Items.

**Co-ordinator Email ID for Non Stock Requisition –** This is the email ID of the person to receive an email when an error occurs in the posting of Non Stock Items.

**Co-ordinator Email ID for Stock Requisition –** This is the email ID of the person to receive an email when an error occurs in the posting of Stock Items.

**Co-ordinator Email ID for Stockless Item Requisition –** This is the email ID of the person to receive an email when an error occurs in the posting of Stockless Items.

**Default Manufacturer Item ID** – Sets the Manufacturer Item ID that appears on the HHT to either one of these selected options.

**Display of Soft Input Panel (Keypad) for numeric –** Displays only a numeric keypad on HHT

**Display of Soft Input Panel (Keypad) –** Displays alphanumeric keypad on HHT

**Factor of Safety for Recommended Par –** Recommended Par value on Optimization Report will be based on the percentage figure entered here.

**Generates a Pick Plan for Stock Items –** If your organization has @Par PICK product check this box to generate a pick plan or pick list for replenishment

**Create HL7/Billing message file –** If your organization requires Billing information and has been set up for such, select this option which allows @Par to send data to your Billing system

**Item Description Option on HHT** – Used to select the Item description type which appears on the HHT.

**Item Price Option on HHT –** The item price will display on Web reports.

**Co-ordinator email ID –** Enter the co-coordinator's Email ID.

**Order Qty Rounding Option –** Select the FLOOR button if you want the order qty to be rounded DOWN and the CEIL button to have order qty rounded UP. For example, an order qty of 24.75 would be 25 if using CEIL button, and 24 if using FLOOR button.

**Requestor –** enter a person, department, or function that can create a requisition

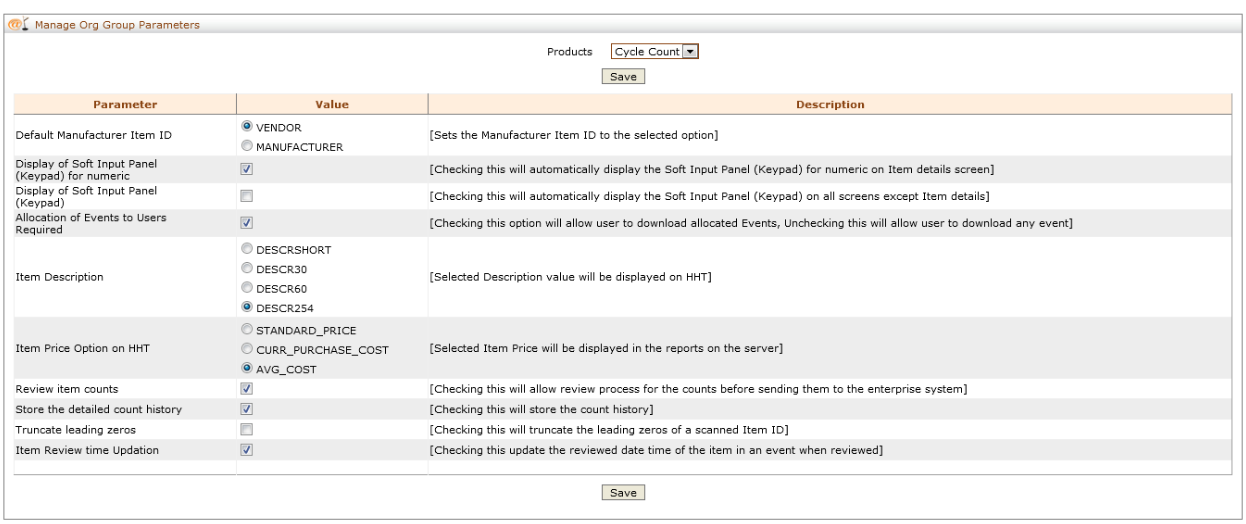
**Truncate leading zeroes -** Check this to truncate the leading zeroes of the item id

After you have finished all Parameters, **click** on the Save button and the following message will appear **Figure 24**


**Figure 24**

**Cycle Count – Group Parameters:**

***Selecting*** Cycle Count from the drop down list will display the following screen **Figure 25**




| Parameter | Value | Description |
|---|---|---|
| Default Manufacturer Item ID | VENDOR / MANUFACTURER | [Sets the Manufacturer Item ID to the selected option] |
| 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] |
| 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] |
| Item Description | DESCRSHORT / DESCR30 / DESCR60 / DESCR254 | [Selected Description value will be displayed on HHT] |
| Item Price Option on HHT | STANDARD_PRICE / CURR_PURCHASE_COST / AVG_COST | [Selected Item Price will be displayed in the reports on the server] |
| Review item counts | ☑ | [Checking this will allow review process for the counts before sending them to the enterprise system] |
| Store the detailed count history | ☑ | [Checking this will store the count history] |
| Truncate leading zeros | ☐ | [Checking this will truncate the leading zeros of a scanned Item ID] |
| Item Review time Updation | ☑ | [Checking this update the reviewed date time of the item in an event when reviewed] |

Save

**Figure 25**

**Default Manufacturer Item ID** – Identifies Manufacturer item id to appear on HHT

**Display of Soft Input Panel (Keypad) for numeric –** Displays only a numeric keypad on HHT

**Display of Soft Input Panel (Keypad) –** Displays alphanumeric keypad on HHT

**Allocation of Events to Users Required** – Unchecked this will allow users to download all the Events. Checked requires allocation of Counting Events be allocated before downloading data.

**Item Description** – Selects the item description to display on HHT

**Item Price Option on HHT –** The item price will display on Web reports.

**Review Item Counts** – If this option is checked the Web user can review item counts on the @Par Server before sending them (uploading) them to the ERP production server. IF unchecked, counts will go immediately to ERP system upon selecting SEND function from the HHT

**Store the detailed count history –** To store count history of events, check this box

**Truncate leading zeroes -** Check this to truncate the leading zeroes of the item id

**Item Review time updation** – Checking this parameter will update the time an event is reviewed

After you have finished all Parameters, **click** on the Save button and the following message will appear **Figure 26**

Manage Org Group Parameters

Organization group Parameters updated successfully

**Figure 26**

**Receiving – Org Group Parameters:**

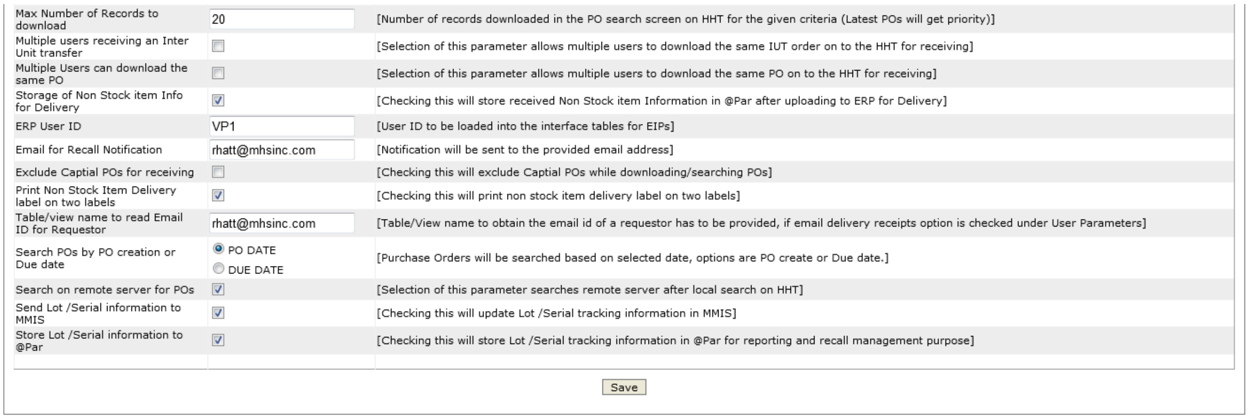
***Selecting*** Receiving from the drop down list will display the following screen **Figure 27**

Manage Org Group Parameters

Products Receiving

Save

| Parameter | Value | Description |
|---|---|---|
| Alternate UOM display in HHT | (•) STANDARDUOM<br>( ) PO UOM | [Based on the option selected alternate UOM are displayed in that UOM] |
| ASN/ASR Receipt by InvoiceNo or PackSlipNo | ( ) Invoice No<br>( ) Pack Slip No<br>(•) None | [Based on the selected option,either Invoice No or Pack Slip No will be activated on the HHT for the user to enter for download of ASN/ASR Receipts] |
| ASN Receipt status after EDI ASN/ASR loaded in ERP | ( ) Hold<br>( ) Open<br>(•) None | [ASN receipt status will be checked against the selected option while downloading the PO/Invoice No/Pack Slip No in PeopleSoft] |
| Default Manufacturer Item ID | (•) VENDOR<br>( ) MANUFACTURER | [Selected Manufacturer Item ID will be displayed on the HHT] |
| Display of Soft Input Panel (Keypad) for numeric | [x] | [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] |
| Item Description Option | ( ) DESCRSHORT<br>( ) DESCR30<br>(•) DESCR60<br>( ) DESCR254 | [Selected Description value will be displayed on HHT for an Item] |
| Item Price Option on HHT | (•) STANDARD_PRICE<br>( ) CURR_PURCHASE_COST<br>( ) AVG_COST | [Selected Item Price will be displayed in the reports on the server] |
| Enable Lot /Serial Tracking | ( ) None<br>( ) MMIS<br>(•) AtPar | [Lot/Serial tracking information is stored based on the selected option] |



| | | |
|---|---|---|
| Max Number of Records to download | 20 | [Number of records downloaded in the PO search screen on HHT for the given criteria (Latest POs will get priority)] |
| Multiple users receiving an Inter Unit transfer | ☐ | [Selection of this parameter allows multiple users to download the same IUT order on to the HHT for receiving] |
| Multiple Users can download the same PO | ☐ | [Selection of this parameter allows multiple users to download the same PO on to the HHT for receiving] |
| Storage of Non Stock item Info for Delivery | ☑ | [Checking this will store received Non Stock item Information in @Par after uploading to ERP for Delivery] |
| ERP User ID | VP1 | [User ID to be loaded into the interface tables for EIPs] |
| Email for Recall Notification | rhatt@mhsinc.com | [Notification will be sent to the provided email address] |
| Exclude Captial POs for receiving | ☐ | [Checking this will exclude Captial POs while downloading/searching POs] |
| Print Non Stock Item Delivery label on two labels | ☑ | [Checking this will print non stock item delivery label on two labels] |
| Table/view name to read Email ID for Requestor | rhatt@mhsinc.com | [Table/View name to obtain the email id of a requestor has to be provided, if email delivery receipts option is checked under User Parameters] |
| Search POs by PO creation or Due date | ◉ PO DATE ○ DUE DATE | [Purchase Orders will be searched based on selected date, options are PO create or Due date.] |
| Search on remote server for POs | ☑ | [Selection of this parameter searches remote server after local search on HHT] |
| Send Lot /Serial information to MMIS | ☑ | [Checking this will update Lot /Serial tracking information in MMIS] |
| Store Lot /Serial information to @Par | ☑ | [Checking this will store Lot /Serial tracking information in @Par for reporting and recall management purpose] |

Save

**Figure 27**

**Alternate UOM display in HHT –** If your organization utilized multiple UOMs select this option. It will display an alternate UOM for each item if the item has more than one UOM

**ASN/ASR Receipt by InvoiceNo or PackSlipNo –** If InvoiceNo (invoice number) or PackSlipNo (packing slip number) buttons selected, there will be an additional field appear on the HHT on the Receive Status screen. HHT user can receive by one of the fields by scanning or entering the respective information. If the None button is selected the field will not appear.

**ASN Receipt status after EDI ASN/ASR loaded in ERP –** If HOLD or OPEN button is selected this limits ASN/ASR receipts to be downloaded to the HHT device. For example, if HOLD is selected, only ASN/ASR receipts that have HOLD status will be downloaded to the HHT. If NONE is selected, then ALL ASN/ASR receipts can be downloaded to the HHT.

**Default Manufacturer Item ID** – Identifies Manufacturer item id to appear on HHT

**Display of Soft Input Panel (Keypad) for numeric –** Displays only a numeric keypad on HHT

**Display of Soft Input Panel (Keypad) –** Displays alphanumeric keypad on HHT

**Item Description Option** – Selects the item description to display on HHT

**Item Price Option on HHT –** The item price will display on Web reports.

**Enable Lot/Serial Tracking –** None = No capture of Lot/Serial numbers, MMIS = ERP system tracking information, AtPar = Capture information for reporting purpose in @Par MT database

**Max Number of Records to download** – Used to restrict the search results for open Pos from ERP system.

**Multiple users receiving an Inter Unit Transfer –** Checked allows up to 3 users to receive same IUT

**Multiple users can download the same PO** – Checking this will allow multiple users to download the same PO

**Storage of Non Stock item info for delivery –** Checking this will store non stock items received from @Par for use in the @Par Deliver product

**ERP User ID** – Valid PeopleSoft user id for inserting into ERP [PeopleSoft specific parameter]

**Email for Recall Notification –** Enter email address for receiving Recall notifications. This can be a personal user email or distribution email

**Exclude Capital POs for receiving –** If checked, users will not be able to receive any purchase order that is designated as a Capital PO. Unchecked and users on HHT will be able to receive all POs.

**Print Non Stock Delivery Item label on two labels –** Checked and users on HHT will be able to automatically print two labels. Unchecked, in order for users on HHT to print two labels they will have to tap the print button twice.

**Table/view name to read Email ID for Requestor –** Enter Table or View that has been created to store Email ID for Deliver to requestor. Note: This has to be created in your ERP system by the DBA first before the functionality will work. This is used on @Par Deliver to print receipts.

**Search POs by PO Creation or Due Date –** Selecting one of the radio buttons will default the data search on the HHT. If when using the Search screen the search should be using the PO Date, select this option. If the search is conducted using the PO Due Date, select this option. This field can be overwritten on the HHT.

**Search on remote server for PO –** When selected, this will search HHT and then remote server for PO on the HHT

**Send Lot/Serial information to MMIS –** Checking this will update the MMIS system with the Lot and Serial information

**Store Lot/Serial Information to @Par –** Checking this will store Lot and Serial tracking information in @Par for reporting and recall management purposes

After you have finished all Parameters, **click** on the Save button and the following message will appear **Figure 28**


**Figure 28**

**Par Mgmt Receiving – Group Parameters:**

There is one additional parameter available if your organization has Par Management Receiving **Figure 29**

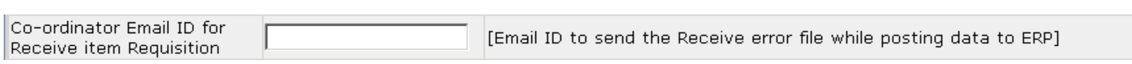



**Figure 29**

**Co-ordinator Email ID for Receive Item Requisition –** Enter the email address of individual that receives error message while Receive Item Requisition posting

After you have finished all Parameters, **click** on the Save button and the following message will appear **Figure 30**


**Figure 30**

**Pick – Org Group Parameters:**

***Selecting*** Pick from the drop down list will display the following screen **Figure 31**

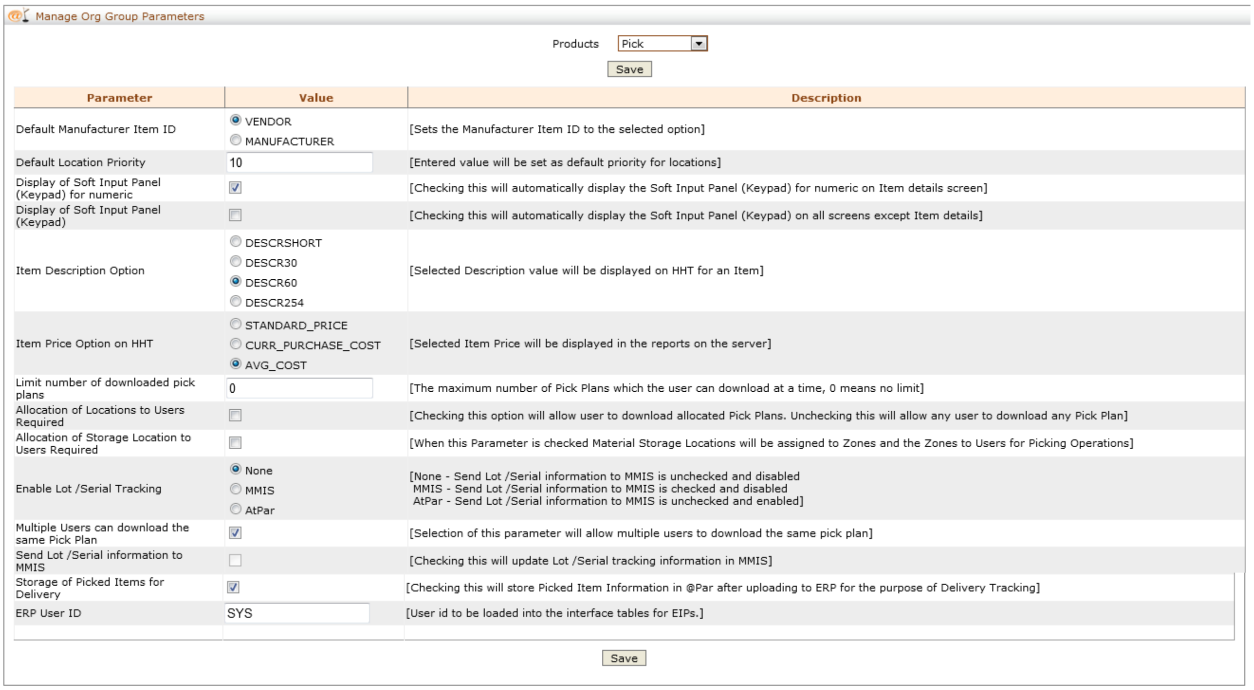



**Figure 31**

**Default Manufacturer Item ID** – Identifies Manufacturer item id to appear on HHT.

**Default Location Priority** – The entered value will be used for the default priority location. This determines the Pick Plan download order on the HHT

**Display of Soft Input Panel (Keypad) for numeric –** Displays only a numeric keypad on HHT

**Display of Soft Input Panel (Keypad) –** Displays alphanumeric keypad on HHT

**Item Description Option** – Selects the item description to display on HHT

**Item Price Option on HHT –** The item price will display on Web reports.

**Limit number of downloaded pick plans** – The maximum number of Pick Plans that a user can download at a time. Entering a 0 will enable the user to download an unlimited number of plans.

**Allocation of Locations to Users Required** – Checking this will allow users to download only pick plans allocated to the user. Leaving it unchecked will allow the user to download any Pick Plan.

**Allocation of Storage Locations to Users Required** – Checking this will allow users to download only pick plans with allocated storage locations to the user. Leaving it unchecked will allow the HHT user to download any Pick Plan

**Enable Lot/Serial Tracking –** None = No capture of Lot/Serial numbers, MMIS = ERP system tracking information, AtPar = Capture information for reporting purpose in @Par MT database

**Multiple Users can download the same Pick Plan -** Checked allows multiple users to download same pick plan. Unchecked allows only one user to download a pick plan

**Send Lot/Serial information to MMIS –** Checking this will send Lot/Serial tracking information to MMIS system

**Storage of Picked Items for Delivery –** Checking will store all picked items for use with the @Par Delivery product

**ERP User ID** – Valid PeopleSoft user id for inserting into ERP [PeopleSoft specific parameter]

After you have finished all Parameters, **click** on the Save button and the following message will appear **Figure 32**

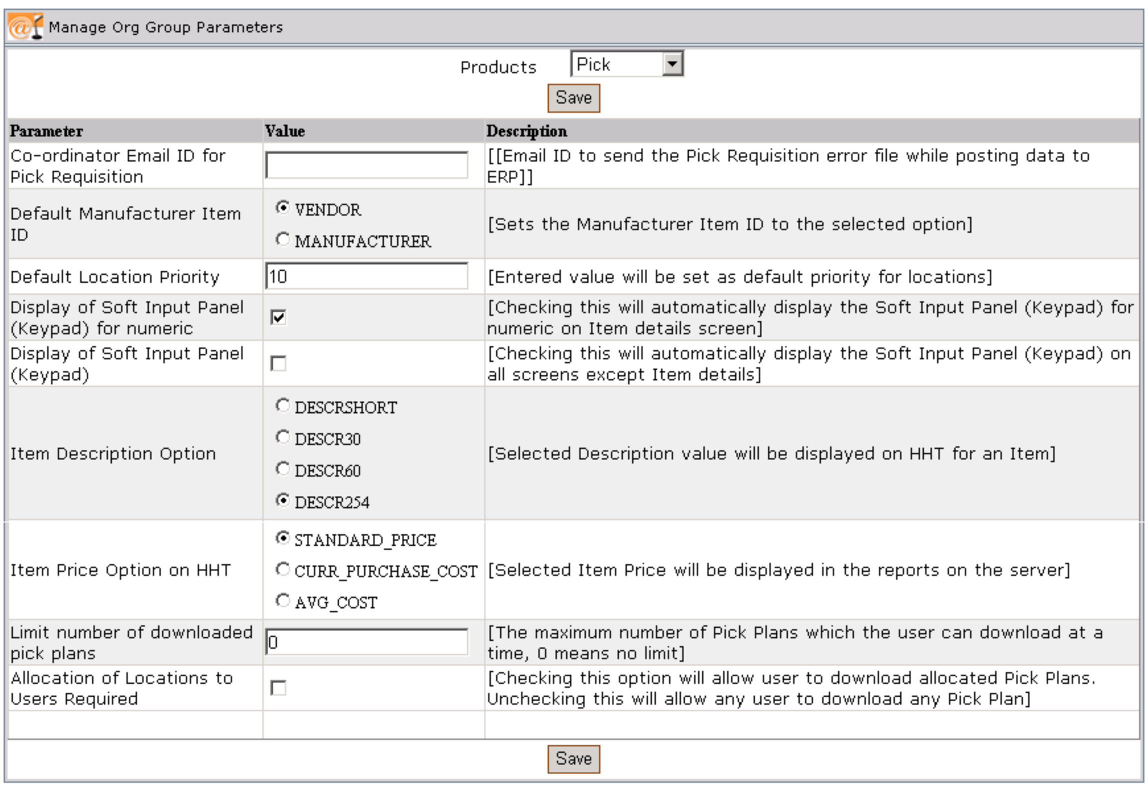

Manage Org Group Parameters

Organization group Parameters updated successfully

**Figure 32**

**Par Mgmt Pick – Org Group Parameters:**

***Selecting*** Pick from the drop down list will display the following screen **Figure 33**


Manage Org Group Parameters

Products: Pick

Save

| Parameter | Value | Description |
|---|---|---|
| Co-ordinator Email ID for Pick Requisition | | [[Email ID to send the Pick Requisition error file while posting data to ERP]] |
| Default Manufacturer Item ID | (●) VENDOR<br>( ) MANUFACTURER | [Sets the Manufacturer Item ID to the selected option] |
| Default Location Priority | 10 | [Entered value will be set as default priority for locations] |
| 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] |
| Item Description Option | ( ) DESCRSHORT<br>( ) DESCR30<br>( ) DESCR60<br>(●) DESCR254 | [Selected Description value will be displayed on HHT for an Item] |
| Item Price Option on HHT | (●) STANDARD_PRICE<br>( ) CURR_PURCHASE_COST<br>( ) AVG_COST | [Selected Item Price will be displayed in the reports on the server] |
| Limit number of downloaded pick plans | 0 | [The maximum number of Pick Plans which the user can download at a time, 0 means no limit] |
| Allocation of Locations to Users Required | ☐ | [Checking this option will allow user to download allocated Pick Plans. Unchecking this will allow any user to download any Pick Plan] |

Save

**Figure 33**

**Co-ordinator Email ID for Pick Requisition –** This is the email ID of the person to receive an email when an error occurs in the posting of Stock Items.

**Default Manufacturer Item ID** – Identifies Manufacturer item id to appear on HHT.

**Default Location Priority** – The entered value will be used for the default priority location. This determines the Pick Plan download order on the HHT

**Display of Soft Input Panel (Keypad) for numeric –** Displays only a numeric keypad on HHT

**Display of Soft Input Panel (Keypad) –** Displays alphanumeric keypad on HHT

**Item Description Option** – Selects the item description to display on HHT

**Item Price Option on HHT –** The item price will display on Web reports.

**Limit number of downloaded pick plans** – The maximum number of Pick Plans that a user can download at a time. Entering a 0 will enable the user to download an unlimited number of plans.

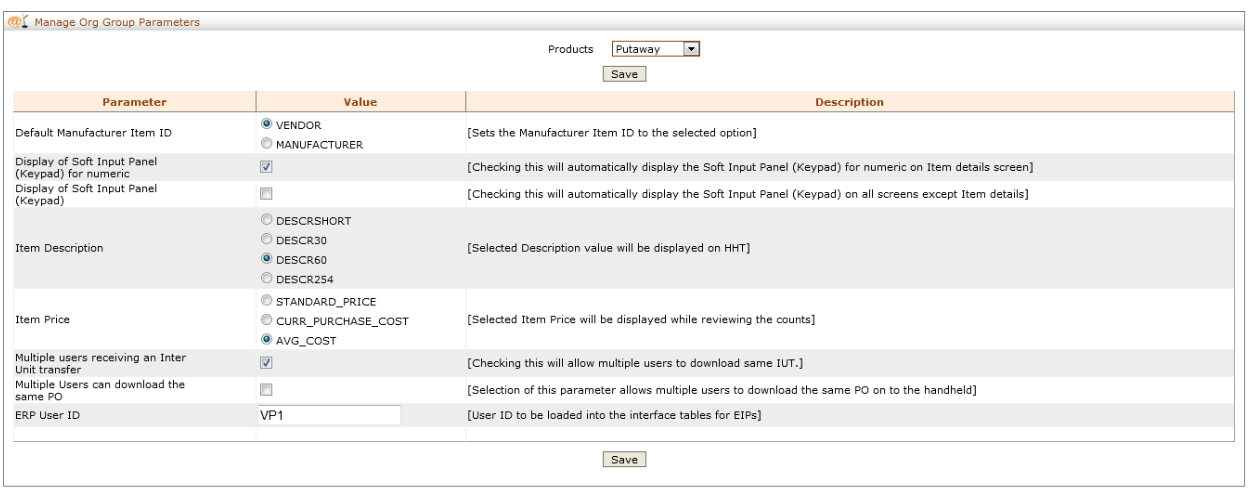
**Allocation of Locations to Users Required** – Checking this will allow users to download only pick plans allocated to the user. Leaving it unchecked will allow any user to download any Pick Plan.

After you have finished all Parameters, **click** on the Save button and the following message will appear **Figure 34**


**Figure 34**

**Putaway – Org Group Parameters:**

***Selecting*** Putaway from the drop down list will display the following screen **Figure 35**



Manage Org Group Parameters

Products: Putaway

Save

| Parameter | Value | Description |
|---|---|---|
| Default Manufacturer Item ID | (•) VENDOR<br>( ) MANUFACTURER | [Sets the Manufacturer Item ID to the selected option] |
| Display of Soft Input Panel (Keypad) for numeric | [x] | [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] |
| Item Description | ( ) DESCRSHORT<br>( ) DESCR30<br>(•) DESCR60<br>( ) DESCR254 | [Selected Description value will be displayed on HHT] |
| Item Price | ( ) STANDARD_PRICE<br>( ) CURR_PURCHASE_COST<br>(•) AVG_COST | [Selected Item Price will be displayed while reviewing the counts] |
| Multiple users receiving an Inter Unit transfer | [x] | [Checking this will allow multiple users to download same IUT.] |
| Multiple Users can download the same PO | [ ] | [Selection of this parameter allows multiple users to download the same PO on to the handheld] |
| ERP User ID | VP1 | [User ID to be loaded into the interface tables for EIPs] |

Save

**Figure 35**

**Default Manufacturer Item ID** – Identifies Manufacturer item id to appear on HHT.

**Display of Soft Input Panel (Keypad) for numeric –** Displays only a numeric keypad on HHT

**Display of Soft Input Panel (Keypad) –** Displays alphanumeric keypad on HHT

**Item Description** – Selects the item description to display on HHT

**Item Price –** The item price will display on Web reports.

**Multiple users receiving an Inter Unit Transfer –** Checked allows up to 3 users to receive same IUT

**Multiple users can download the same PO** – Checking this will allow multiple users to download the same PO

**ERP User ID** – Valid PeopleSoft user id for inserting into ERP [PeopleSoft specific parameter]

After you have finished all Parameters, **click** on the Save button and the following message will appear **Figure 36**

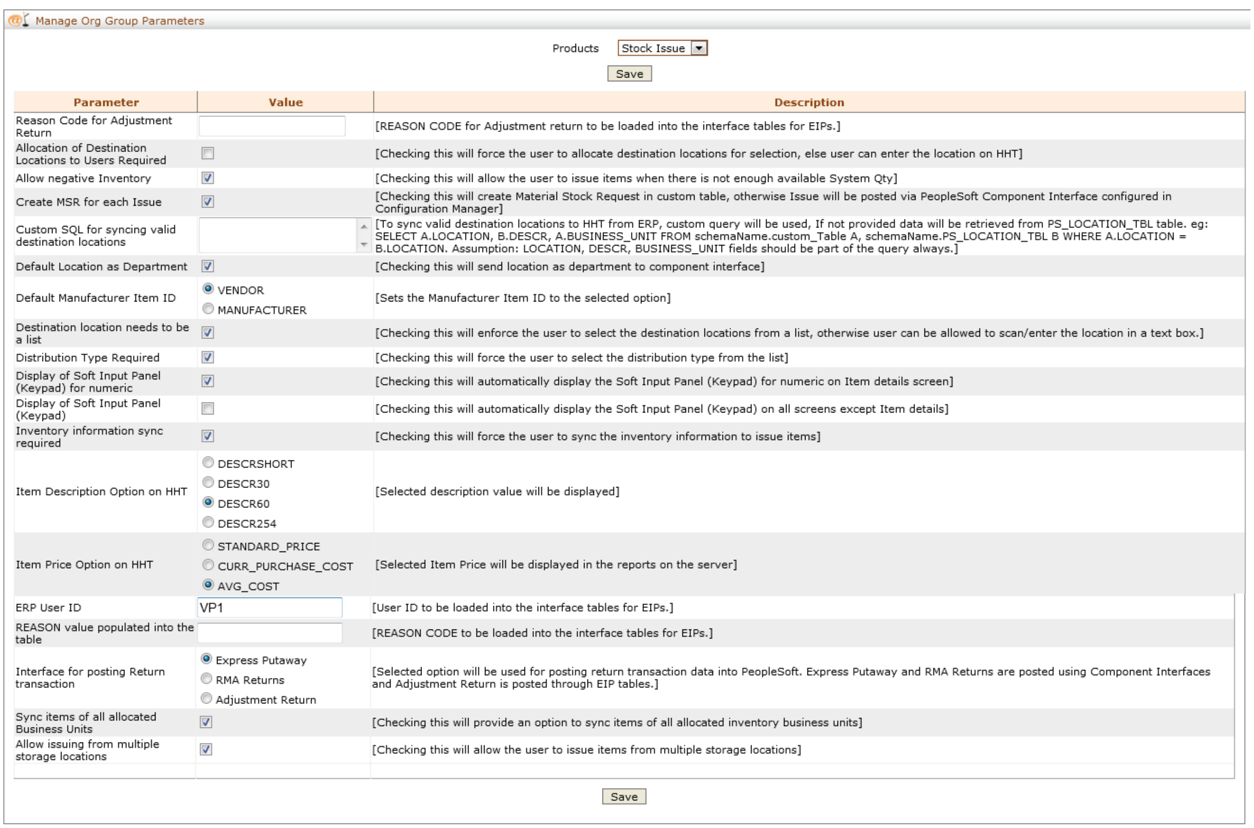

Manage Org Group Parameters

Organization group Parameters updated successfully

**Figure 36**

## Stock Issue – Org Group Parameters:

***Selecting*** Stock Issue from the drop down list will display the following screen **Figure 37**


Manage Org Group Parameters

Products: Stock Issue

Save

| Parameter | Value | Description |
|---|---|---|
| Reason Code for Adjustment Return | | [REASON CODE for Adjustment return to be loaded into the interface tables for EIPs.] |
| Allocation of Destination Locations to Users Required | ☐ | [Checking this will force the user to allocate destination locations for selection, else user can enter the location on HHT] |
| Allow negative Inventory | ☑ | [Checking this will allow the user to issue items when there is not enough available System Qty] |
| Create MSR for each Issue | ☑ | [Checking this will create Material Stock Request in custom table, otherwise Issue will be posted via PeopleSoft Component Interface configured in Configuration Manager] |
| Custom SQL for syncing valid destination locations | | [To sync valid destination locations to HHT from ERP, custom query will be used, If not provided data will be retrieved from PS_LOCATION_TBL table. eg: SELECT A.LOCATION, B.DESCR, A.BUSINESS_UNIT FROM schemaName.custom_Table A, schemaName.PS_LOCATION_TBL B WHERE A.LOCATION = B.LOCATION. Assumption: LOCATION, DESCR, BUSINESS_UNIT fields should be part of the query always.] |
| Default Location as Department | ☑ | [Checking this will send location as department to component interface] |
| Default Manufacturer Item ID | ◉ VENDOR<br>○ MANUFACTURER | [Sets the Manufacturer Item ID to the selected option] |
| Destination location needs to be a list | ☑ | [Checking this will enforce the user to select the destination locations from a list, otherwise user can be allowed to scan/enter the location in a text box.] |
| Distribution Type Required | ☑ | [Checking this will force the user to select the distribution type from the list] |
| 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] |
| Inventory information sync required | ☑ | [Checking this will force the user to sync the inventory information to issue items] |
| Item Description Option on HHT | ○ DESCRSHORT<br>○ DESCR30<br>◉ DESCR60<br>○ DESCR254 | [Selected description value will be displayed] |
| Item Price Option on HHT | ○ STANDARD_PRICE<br>○ CURR_PURCHASE_COST<br>◉ AVG_COST | [Selected Item Price will be displayed in the reports on the server] |
| ERP User ID | VP1 | [User ID to be loaded into the interface tables for EIPs.] |
| REASON value populated into the table | | [REASON CODE to be loaded into the interface tables for EIPs.] |
| Interface for posting Return transaction | ◉ Express Putaway<br>○ RMA Returns<br>○ Adjustment Return | [Selected option will be used for posting return transaction data into PeopleSoft. Express Putaway and RMA Returns are posted using Component Interfaces and Adjustment Return is posted through EIP tables.] |
| Sync items of all allocated Business Units | ☑ | [Checking this will provide an option to sync items of all allocated inventory business units] |
| Allow issuing from multiple storage locations | ☑ | [Checking this will allow the user to issue items from multiple storage locations] |

Save

**Figure 37**

**Reason Code for Adjustment Return –** Enter the Reason Code to be used for returns in the interface tables

**Allocation of Destination Locations to Users Required –** if option is checked, will require allocation of Destination locations be done before user can access any data on download to HHT

**Allow negative inventory –** If this option is checked, user will be able to issue order for an item with a negative on hand quantity

**Create MSR for each Issue –** Check option to create an MSR Issue or order in @Par

**Custom SQL for synching valid destination locations –** If a custom SQL statement is required to obtain data, then check this option with valid SQL retrieval statement

**Default Location as Department –** If this option is checked, the Department field will automatically default from Location field for use in interface

**Default Manufacturer Item ID** – Identifies Manufacturer item id to appear on HHT.

**Destination location needs to be a list –** If this option is checked the Location field on the HHT will be a drop down list that HHT user needs to select from. If option is unchecked, then the Location field will be a text box field

**Distribution type required –** Checking this option will require HHT user to select a distribution type for a drop down list before issuing an item

**Display of Soft Input Panel (Keypad) for numeric –** Displays only a numeric keypad on HHT

**Display of Soft Input Panel (Keypad) –** Displays alphanumeric keypad on HHT

**Inventory information sync required –** Check this to require user to sync data when issuing items.

**Item Description Option on HHT**– Selects the item description to display on HHT

**Item Price Option on HHT –** The item price will display on Web reports.

**ERP User ID** – Valid PeopleSoft user id for inserting into ERP [PeopleSoft specific parameter]

**REASON value populated into the table –** Enter value for Reason Code

**Interface for posting Return transactions –** Selected option will be used for posting return transaction data into PeopleSoft. Express Putaway and RMA Returns are posted using Component Interfaces and Adjustment Return is posted through EIP tables

**Sync Items of all allocated Business Units –** If the option is checked this will allow HHT user ability to sync for multiple Business Units that have been allocated to them. If unchecked, the HHT user will only be able to synch for a single Business Unit

**Allow Issuing from multiple storage locations –** Check to allow HHT user the ability to issue items from multiple storage locations.

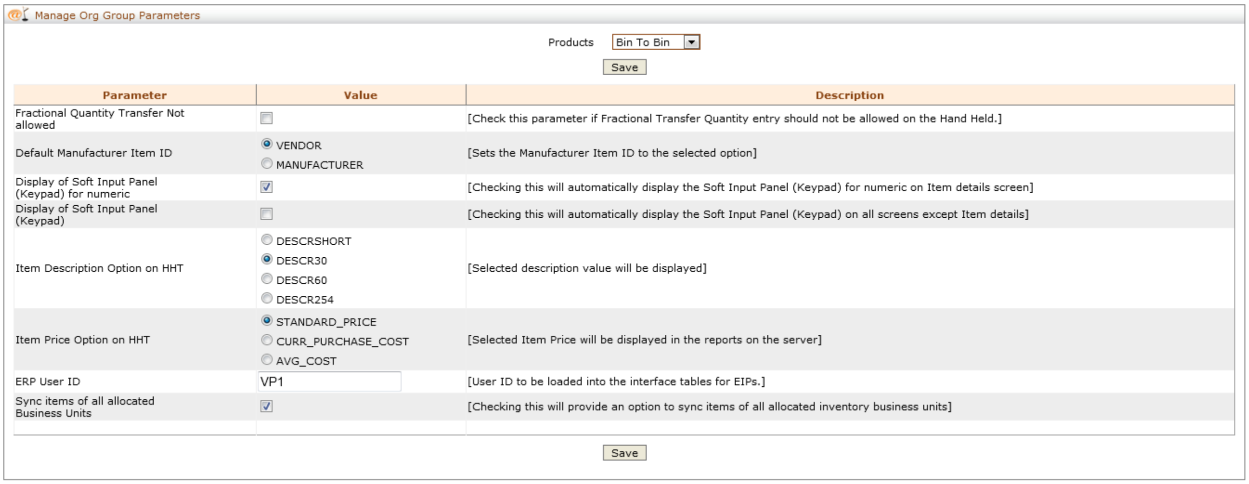
After you have finished all Parameters, **click** on the 

button and the following message will appear **Figure 38**


Figure 38

## Bin to Bin – Org Group Parameters:

Bin to Bin is used to receive Inter Unit Transfers (IUT). ***Selecting*** Bin to Bin from the drop down list will display the following screen **Figure 39**




| Parameter | Value | Description |
|---|---|---|
| Fractional Quantity Transfer Not allowed | ☐ | [Check this parameter if Fractional Transfer Quantity entry should not be allowed on the Hand Held.] |
| Default Manufacturer Item ID | ◉ VENDOR ○ MANUFACTURER | [Sets the Manufacturer Item ID to the selected option] |
| 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] |
| Item Description Option on HHT | ○ DESCRSHORT ◉ DESCR30 ○ DESCR60 ○ DESCR254 | [Selected description value will be displayed] |
| Item Price Option on HHT | ◉ STANDARD_PRICE ○ CURR_PURCHASE_COST ○ AVG_COST | [Selected Item Price will be displayed in the reports on the server] |
| ERP User ID | VP1 | [User ID to be loaded into the interface tables for EIPs.] |
| Sync items of all allocated Business Units | ☑ | [Checking this will provide an option to sync items of all allocated inventory business units] |



Figure 39

**Fractional Quantity Transfer not allowed –** Checked will disallow entry of a fractional quantity on the HHT

**Default Manufacturer Item ID** – Identifies Manufacturer item id to appear on HHT.

**Display of Soft Input Panel (Keypad) for numeric –** Displays only a numeric keypad on HHT

**Display of Soft Input Panel (Keypad) –** Displays alphanumeric keypad on HHT

**Item Description Option** – Selects the item description to display on HHT

**Item Price Option on HHT –** The item price will display on Web reports.

**ERP User ID** – Valid PeopleSoft user id for inserting into ERP [PeopleSoft specific parameter]

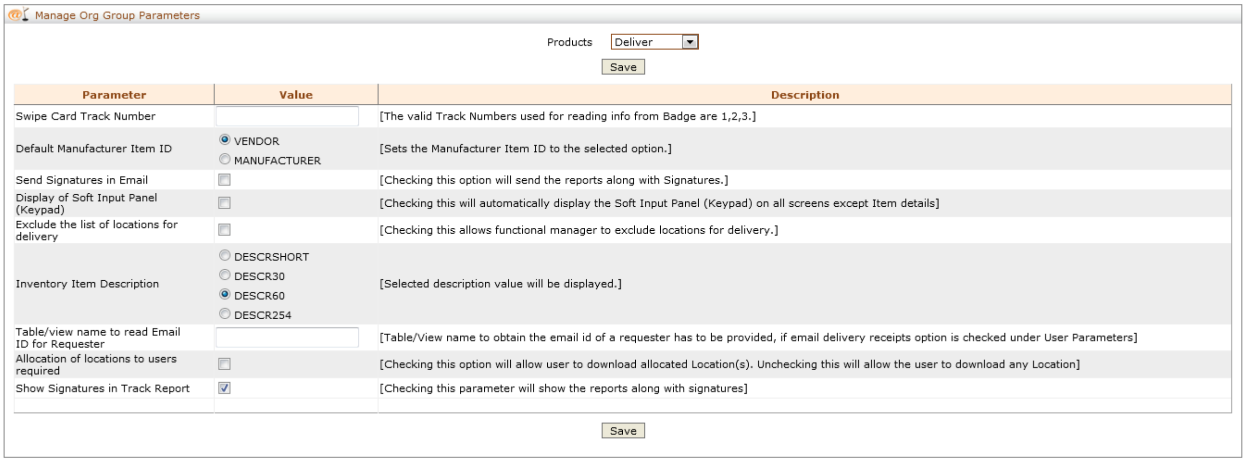
**Sync Items of all allocated Business Units –** If the option is checked this will allow HHT user ability to sync for multiple Business Units that have been allocated to them. If unchecked, the HHT user will only be able to synch for a single Business Unit

After you have finished all Parameters, **click** on the Save button and the following message will appear **Figure 40**


Figure 40

**Deliver – Org Group Parameters:**

***Selecting*** Deliver from the drop down list will display the following screen **Figure 41**


Manage Org Group Parameters

Products: Deliver

Save

| Parameter | Value | Description |
|---|---|---|
| Swipe Card Track Number | | [The valid Track Numbers used for reading info from Badge are 1,2,3.] |
| Default Manufacturer Item ID | (•) VENDOR ( ) MANUFACTURER | [Sets the Manufacturer Item ID to the selected option.] |
| Send Signatures in Email | ☐ | [Checking this option will send the reports along with Signatures.] |
| Display of Soft Input Panel (Keypad) | ☐ | [Checking this will automatically display the Soft Input Panel (Keypad) on all screens except Item details] |
| Exclude the list of locations for delivery | ☐ | [Checking this allows functional manager to exclude locations for delivery.] |
| Inventory Item Description | ( ) DESCRSHORT ( ) DESCR30 (•) DESCR60 ( ) DESCR254 | [Selected description value will be displayed.] |
| Table/view name to read Email ID for Requester | | [Table/View name to obtain the email id of a requester has to be provided, if email delivery receipts option is checked under User Parameters] |
| Allocation of locations to users required | ☐ | [Checking this option will allow user to download allocated Location(s). Unchecking this will allow the user to download any Location] |
| Show Signatures in Track Report | ☑ | [Checking this parameter will show the reports along with signatures] |

Save

**Figure 41**

**Swipe Card Track Number –** If applicable, enter for reading data/bar code from organizations' badges

**Default Manufacturer Item ID** – Identifies Manufacturer item id to appear on HHT

**Send Signatures in Email –** If this option is checked it will allow users to send emails of Web page reports

**Display of Soft Input Panel (Keypad) –** Displays alphanumeric keypad on HHT

**Exclude the list of locations for delivery –** Checking this allows functional manager to exclude locations for delivery

**Inventory Item Description** – Selects the item description to display on HHT

**Table/view name to read Email ID for Requestor –** Enter Table or View that has been created to store Email ID for Deliver to requestor. Note: This has to be created in your ERP system by the DBA first before the functionality will work. This is used on @Par Deliver to print receipts.

**Allocation of locations to users required –** If your organizations requires deliver to locations be assigned to HHT users, ensure this option is checked

**Show Signatures in Track Report –** Checking this option will users the ability to see signatures on the Delivery Tracking report.

After you have finished all Parameters, **click** on the Save button and the following message will appear **Figure 42**


Manage Org Group Parameters

Organization group Parameters updated successfully

**Figure 42**

### Par Mgmt Deliver – Org Group Parameters:

There is one additional parameter that is found on the following screen **Figure 43**

| | | |
|---|---|---|
| Email ID for employee data load failures notification | | [[Employee data load failures will be notified to the email provided]] |

**Figure 43**

**Email ID for employee data load failures notifications –** If your organization uses a method to list employee data/names for the recipient field on the HHT, enter the email address of individual to be notified of error messages when this fails

After you have finished all Parameters, **click** on the Save button and the following message will appear **Figure 44**

| Manage Org Group Parameters |
|---|
| Organization group Parameters updated successfully |

**Figure 44**

### Point of Use – Org Group Parameters:

***Selecting*** Point of Use from the drop down list will display the following screen **Figure 45**

Manage Org Group Parameters

Products: Point Of Use

Save

| Parameter | Value | Description |
|---|---|---|
| Allow Negative Quantity | ☑ | [Checking this will allow the user to issue more than on hand quantity ] |
| Default Manufacturer Item ID | ◉ VENDOR<br>○ MANUFACTURER | [Sets the Manufacturer Item ID to the selected option] |
| Duration for Tracking Expiration | 5 | [Default Duration for Tracking Expiration] |
| Email Id for alerts | rhatt@mhsinc.com | [Email Id to which email are sent] |
| 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] |
| Exception Approval Required | ☑ | [Check this if Exception Approval required when Item is not under contract] |
| Factor of safety percentage(%) for recommended par | 10 | [Recommended Par will be calculated based on the Factor of safety, Recommended Par = Round (Average Usage * (1+Factor of Safety/100))] ] |
| Frequency of Email Alerts | 300 | [Frequency in minutes which user get the Email alerts] |
| Create HL7 billing message/file | ☐ | [Checking this will send a HL7 billing message, unchecking will create a HL7 billing file in upload path] |
| Inventory Item Description | ○ DESCRSHORT<br>○ DESCR30<br>◉ DESCR60<br>○ DESCR254 | [Selected description value will be displayed] |
| Item Price | ○ STANDARD_PRICE<br>○ CURR_PURCHASE_COST<br>◉ AVG_COST | [Selected Item Price will be displayed in the reports on the server] |
| Percentage of Optimum quantity | 50 | [If quantity on hand goes below this percentage user receive email alerts] |
| Order Qty Rounding Option | ◉ Floor<br>○ Ceil | [Selected rounding option will be used to calculate the order qty] |
| Email for Recall Notification | rhatt@mhsinc.com | [Notification will be sent to the provided email address] |
| Reserve Qty while CasePick | ☐ | [Checking this will keep the qty in reserve and updates after Record Consumption] |
| Sends Email Alerts | ☑ | [If checked send email alerts for the events ( as of now its only one event)if quantity on hand below the % of optimum quantity] |
| Generate separate order for each Issue | ☑ | [Checking this will generates separate order for each issue for the items whose ordering type is ISSUE] |
| Vendor Review Required | ☑ | [Check this if Vendor needs to review information of Bill Only Items used prior to creating the Order] |

Save

**Figure 45**

**Allow Negative Quantity –** Checked allows user to issue more than on hand quantity

**Default Manufacturer Item ID –** Identifies Manufacturer item id to appear on HHT

**Duration for Tracking Expiration –** Enter a value in days for Tracking an item's expiration date

**Email Id for alerts –** Enter either a user email address or a distribution email address to receive alerts such as Low Stock

**Display of Soft Input Panel (Keypad) for numeric –** Displays only a numeric keypad on HHT

**Display of Soft Input Panel (Keypad) –** Displays alphanumeric keypad on HHT

**Exception Approval Required –** Check this if Exception Approval required when Item is not under contract

**Factor of safety percentage (%) for recommended Par –** Recommended Par will be calculated based on the Factor of safety, Recommended Par = Round (Average Usage * (1+Factor of Safety/100) – This factor is used on the Optimization Report.

**Frequency of Email alerts –** Enter a value in minutes to send alerts

**Create HL7 billing message/file –** Checking this will send an HL7 message.  Unchecking will create an HL7 billing file in the upload path designated under the configuration manager

**Inventory Item Description** – Selects the item description to display

**Item Price –** The item price will display on Web reports.

**Percentage of Optimum quantity –** Enter a percent value that when an item's quantity on hand goes below the value the system will send an alert email to the user/distribution list email address

**Order Qty Rounding Option –** Selected option will be used to calculate the order quantity.  Floor = rounding down.  Ceil = rounding up.

**Email for Recall notification –** Enter either a user email address or a distribution list email address to send notifications when Lot or Serial item is on recall

**Reserve Qty while CasePick –** Checking this keeps the item in reserve until Record Consumption process is complete

**Sends Email Alerts –** If checked sends email alerts for example when an item's quantity on hand goes below the optimum quantity

**Generate separate order for each Issue –** For items with ISSUE type, checking this will generate separate orders for each Issue

**Vendor Review Required –** Checked will require Vendor to review information on Bill Only items before creating an order

After you have finished all Parameters, **click** on the 

button and the following message will appear **Figure 46**


**Figure 46**

# Manage Profiles

Manage Profiles is used to add, manage/edit, or delete Profiles needed to use the @Par Products. Once Organization Groups are set up this is the next step. Profiles are created for groups of users.

For example, you can set up a Web User Profile called CARTREPORT. This profile will have users assigned to it that have the ability to login to the @Par Server and review all Cart Count Reports.

A profile named CARTHHT could be a profile, with the users assigned to this profile given the ability to use the Cart Count product and HHT device only.

This is where the set up for User Parameters (Assign parameters), Menu Access (if Web user), and modify Screen Displays by product are done.

**IMPORTANT NOTE: Changes saved in Assign Parameters, Assign Menu Access, and Assign Screen Display levels MUST ALSO BE SAVED FROM THE MANAGE PROFILES main screen! If changes are not made to parameters, or parameters are not selected, the profile will be saved with the default parameter settings. See message received below**

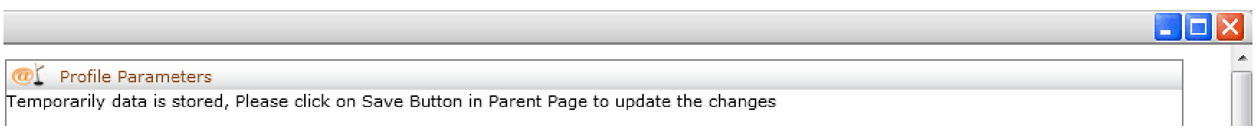



**Figure 46**

***Click*** the **Manage Profiles** link and you will see the following screen **Figure 47**

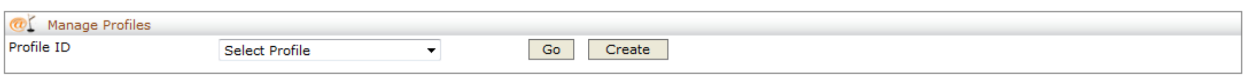
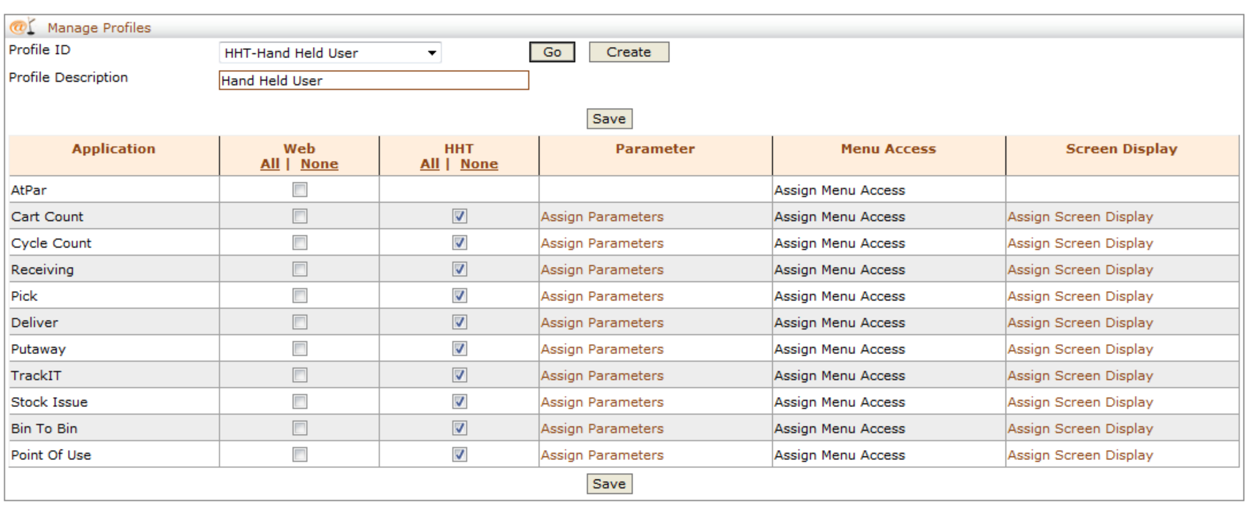



**Figure 47**

If editing profile, select from drop down list and ***click*** 

button **Figure 48**




| Application | Web All \| None | HHT All \| None | Parameter | Menu Access | Screen Display |
|---|---|---|---|---|---|
| AtPar | ☐ | | | Assign Menu Access | |
| Cart Count | ☐ | ☑ | Assign Parameters | Assign Menu Access | Assign Screen Display |
| Cycle Count | ☐ | ☑ | Assign Parameters | Assign Menu Access | Assign Screen Display |
| Receiving | ☐ | ☑ | Assign Parameters | Assign Menu Access | Assign Screen Display |
| Pick | ☐ | ☑ | Assign Parameters | Assign Menu Access | Assign Screen Display |
| Deliver | ☐ | ☑ | Assign Parameters | Assign Menu Access | Assign Screen Display |
| Putaway | ☐ | ☑ | Assign Parameters | Assign Menu Access | Assign Screen Display |
| TrackIT | ☐ | ☑ | Assign Parameters | Assign Menu Access | Assign Screen Display |
| Stock Issue | ☐ | ☑ | Assign Parameters | Assign Menu Access | Assign Screen Display |
| Bin To Bin | ☐ | ☑ | Assign Parameters | Assign Menu Access | Assign Screen Display |
| Point Of Use | ☐ | ☑ | Assign Parameters | Assign Menu Access | Assign Screen Display |

**Figure 48**

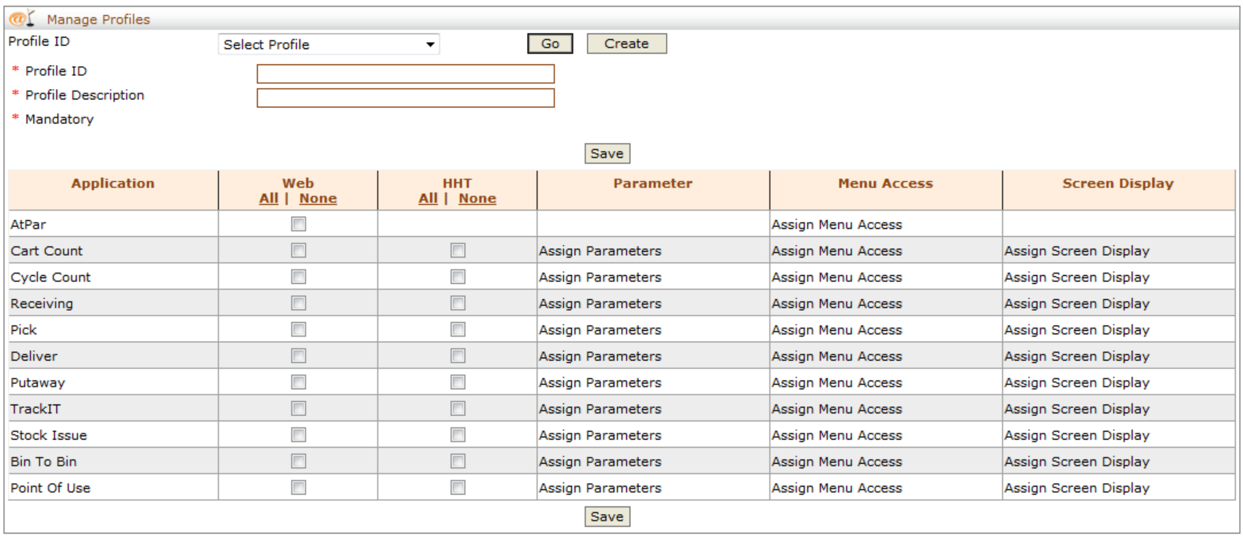

501 Kings Hwy East Fairfield, CT 06825 Phone: (888) 647-4621 Fax: (888) 647-4621

The profile in **Figure 48** has been set up for HHT users for all @Par Products. Since this profile is an HHT user, they do not have access to the Assign Menu Access, thus the link is disabled. The Assign Menu Access link as well as the Assign Parameters and Assign Screen Display links will be discussed in more detail in the **Create a New Profile** section below.

## *Create a New Profile*

***Click*** the Create button shown previously in **Figure 47**.

The following screen should now appear **Figure 49**


Manage Profiles
Profile ID Select Profile Go Create
* Profile ID
* Profile Description
* Mandatory
Save

| Application | Web All \| None | HHT All \| None | Parameter | Menu Access | Screen Display |
|---|---|---|---|---|---|
| AtPar | | | | Assign Menu Access | |
| Cart Count | | | Assign Parameters | Assign Menu Access | Assign Screen Display |
| Cycle Count | | | Assign Parameters | Assign Menu Access | Assign Screen Display |
| Receiving | | | Assign Parameters | Assign Menu Access | Assign Screen Display |
| Pick | | | Assign Parameters | Assign Menu Access | Assign Screen Display |
| Deliver | | | Assign Parameters | Assign Menu Access | Assign Screen Display |
| Putaway | | | Assign Parameters | Assign Menu Access | Assign Screen Display |
| TrackIT | | | Assign Parameters | Assign Menu Access | Assign Screen Display |
| Stock Issue | | | Assign Parameters | Assign Menu Access | Assign Screen Display |
| Bin To Bin | | | Assign Parameters | Assign Menu Access | Assign Screen Display |
| Point Of Use | | | Assign Parameters | Assign Menu Access | Assign Screen Display |

Save

**Figure 49**

**Profile ID –** Enter a unique profile ID

**Profile Description –** Enter a clear profile description. See **Figure 50**

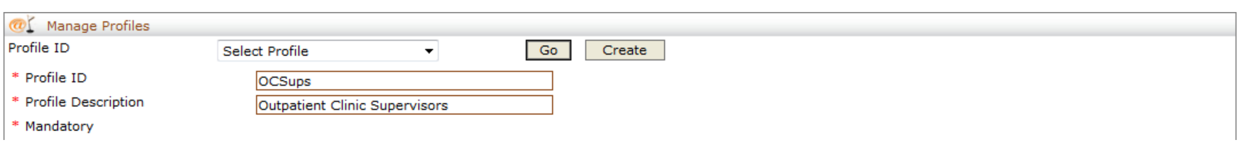



**Figure 50**

**NOTE: Consistent through @Par products, mandatory items/fields are denoted with a red asterisk ***

After entering this information, access has to be set by checking applicable checkboxes See **Figure 51**

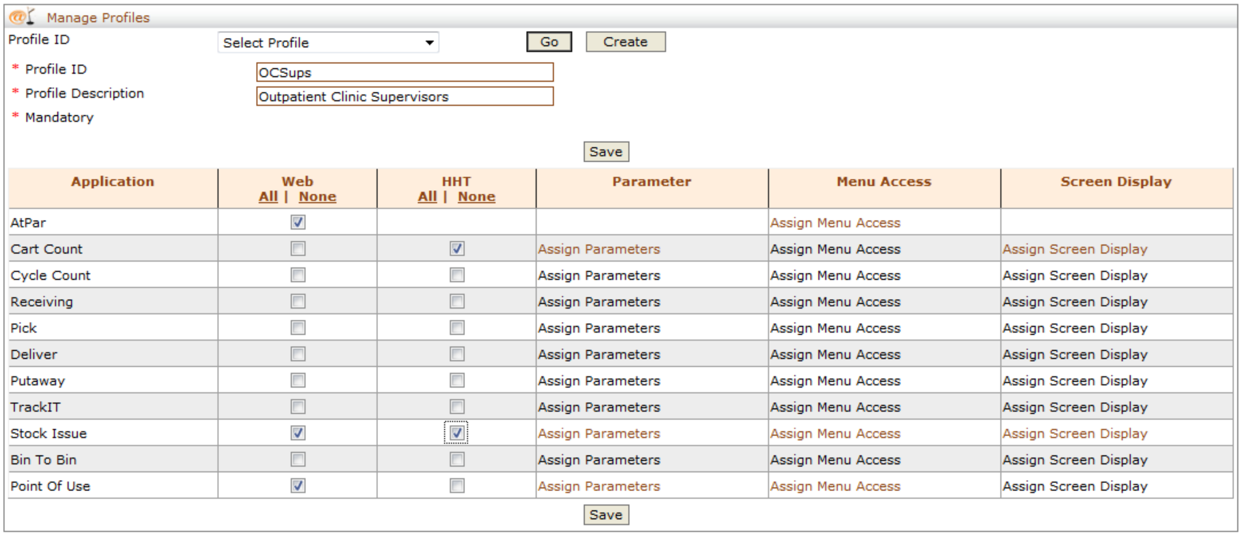



**Figure 51**

**NOTE: When Web checkbox is checked,** Assign Parameters **and** Assign Menu Access **links are enabled. If HHT checkbox is checked,** Assign Parameters **and** Assign Screen Display **options are enabled.**

Select the Product access for this profile by ***clicking*** in the check box associated with the product.

- Web selections will allow the Profile access to the Web or @Par Server for reports, user setups, etc.
- The HHT check box will provide access for this Profile to HHT devices and all functionality associated with the HHT software.

Save the settings by ***clicking*** either of the Save buttons. For a profile to work the user must assign parameters, assign menu access, and/or assign screen display.

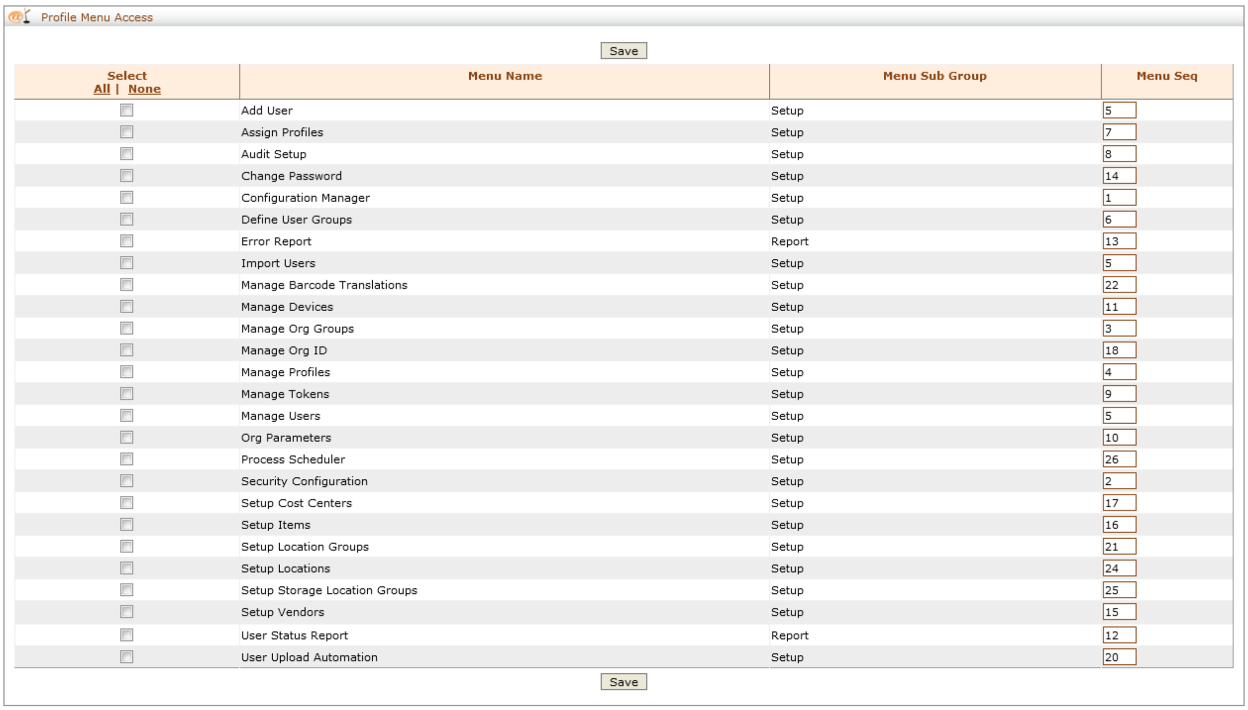
Consistent through the levels (windows) available within a single menu link, the following icons will be display  the icons reflect minimize window, maximize window, and exit the window respectively.

## *Assign Menu Access*

In order for a Web user to access menu options under products, you must ***selec***t the menus to display.

To assign the menu access either ***click*** on all under the "Select" column, or ***click*** in the desired menu option/s to display. If **NONE** is selected there will be nothing under the respective Products links for the Web user to view**!**

***Click*** on the **Atpar** check box in **Figure 51** above, then ***click*** on the **Assign Menu Access** link. The following screen will appear. **Figure 52**



Profile Menu Access

Save

| Select All \| None | Menu Name | Menu Sub Group | Menu Seq |
|---|---|---|---|
| | Add User | Setup | 5 |
| | Assign Profiles | Setup | 7 |
| | Audit Setup | Setup | 8 |
| | Change Password | Setup | 14 |
| | Configuration Manager | Setup | 1 |
| | Define User Groups | Setup | 6 |
| | Error Report | Report | 13 |
| | Import Users | Setup | 5 |
| | Manage Barcode Translations | Setup | 22 |
| | Manage Devices | Setup | 11 |
| | Manage Org Groups | Setup | 3 |
| | Manage Org ID | Setup | 18 |
| | Manage Profiles | Setup | 4 |
| | Manage Tokens | Setup | 9 |
| | Manage Users | Setup | 5 |
| | Org Parameters | Setup | 10 |
| | Process Scheduler | Setup | 26 |
| | Security Configuration | Setup | 2 |
| | Setup Cost Centers | Setup | 17 |
| | Setup Items | Setup | 16 |
| | Setup Location Groups | Setup | 21 |
| | Setup Locations | Setup | 24 |
| | Setup Storage Location Groups | Setup | 25 |
| | Setup Vendors | Setup | 15 |
| | User Status Report | Report | 12 |
| | User Upload Automation | Setup | 20 |

Save

**Figure 52**

This option can be used to change the login look on the @Par Server used by the Web User and/or the @Par administrator. Selecting all will provide this profile and users assigned to the profile access to all menu options available.

The look of the login on the Web can also be sorted or rearranged, using the **Menu Seq** edit boxes on the right hand side of the screen.

If you would like to rearrange the menu option order, then type in the new numbering sequence in the **Menu Seq** boxes. For example, if you want to view the Error Report, Manage Tokens, and User Status report first, type in 1 for Error Report, 2 for Manage Tokens, and 3 for User Status report. When any user in the profile logs in next, these will appear first.

When finished selecting all parameters, ***click*** the Save button and then ***click*** the **X** and you will receive the following message on the screen **Figure 53**

**Please remember to click on the Save button on the Manage Profiles main screen to finalize the save process!!!**


**Figure 53**

**NOTE: Changing check box or sequence and save will display the Figure 53 message.**

To select menu access options for all other @Par products follow the same workflow.

Two messages that might appear are **Figure 54** and **Figure 55**

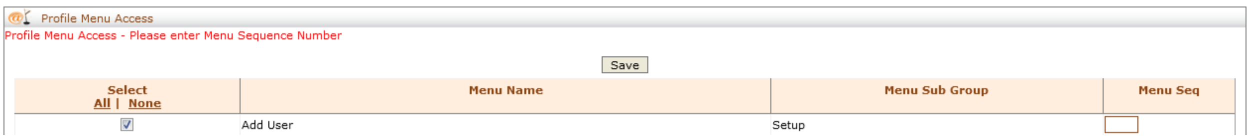



**Figure 54**

This message will appear if you select a menu option without entering a menu sequence number

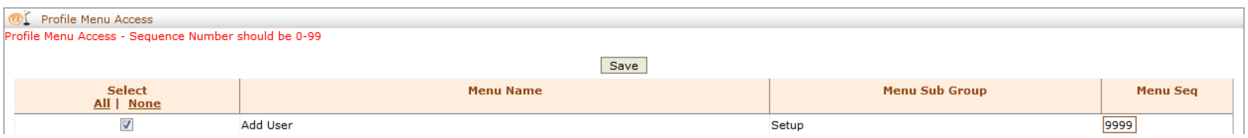
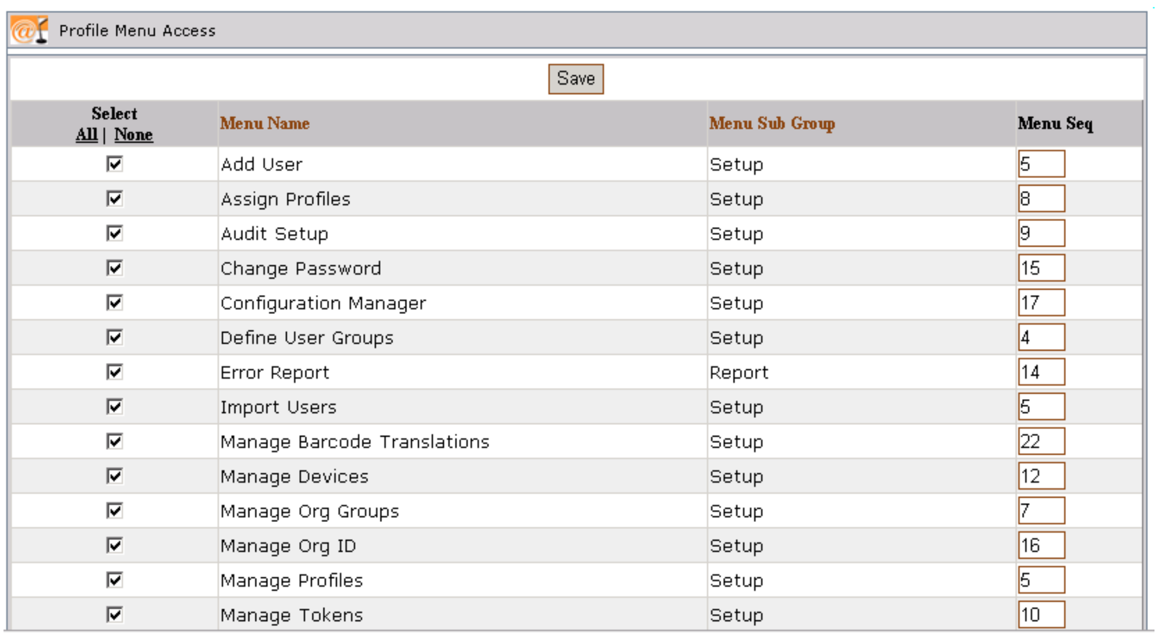



**Figure 55**

This message will appear if you enter a value in menu sequence greater than 99

**Par Mgmt – Atpar – Menu Access: Figure 56**



Profile Menu Access

Save

| Select All \| None | Menu Name | Menu Sub Group | Menu Seq |
|---|---|---|---|
| ☑ | Add User | Setup | 5 |
| ☑ | Assign Profiles | Setup | 8 |
| ☑ | Audit Setup | Setup | 9 |
| ☑ | Change Password | Setup | 15 |
| ☑ | Configuration Manager | Setup | 17 |
| ☑ | Define User Groups | Setup | 4 |
| ☑ | Error Report | Report | 14 |
| ☑ | Import Users | Setup | 5 |
| ☑ | Manage Barcode Translations | Setup | 22 |
| ☑ | Manage Devices | Setup | 12 |
| ☑ | Manage Org Groups | Setup | 7 |
| ☑ | Manage Org ID | Setup | 16 |
| ☑ | Manage Profiles | Setup | 5 |
| ☑ | Manage Tokens | Setup | 10 |


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

| | | | |
|---|---|---|---|
| ☑ | Manage Users | Setup | 6 |
| ☑ | Org Parameters | Setup | 11 |
| ☑ | Security Configuration | Setup | 25 |
| ☑ | Setup Cost Centers | Setup | 3 |
| ☑ | Setup Items | Setup | 1 |
| ☑ | Setup Location Groups | Setup | 21 |
| ☑ | Setup Locations | Setup | 18 |
| ☑ | Setup Vendors | Setup | 2 |
| ☑ | User Status Report | Report | 13 |
| ☑ | User Upload Automation | Setup | 20 |

Save

**Figure 56**

## Cart Count - Menu Access:

Profile Menu Access

Save

| Select<br>All \| None | Menu Name | Menu Sub Group | Menu Seq |
|---|---|---|---|
| ☐ | Activity Report | Reports | 16 |
| ☐ | Allocate Carts | Setup | 3 |
| ☐ | Cart Averages Report | Reports | 6 |
| ☐ | Cart Detail Report | Reports | 7 |
| ☐ | Cart Putaway Report | Reports | 14 |
| ☐ | Create Orders | Setup | 7 |
| ☐ | Critical Items | Setup | 2 |
| ☐ | Daily Activity | Reports | 11 |
| ☐ | Daily User Activity | Reports | 12 |
| ☐ | Item Exception Report | Reports | 8 |
| ☐ | Item Usage Report | Reports | 9 |
| ☐ | Optimization Report | Reports | 10 |
| ☐ | Order History Report | Setup | 4 |
| ☐ | Par Audit Report | Reports | 15 |
| ☐ | Process Parameters | Setup | 19 |
| ☐ | Schedule Compliance Report | Reports | 5 |
| ☐ | User Parameters | Setup | 1 |
| ☐ | User Productivity Report | Reports | 13 |

Save

**Figure 57**

## Par Mgmt with Cart Count – Menu Access:

Profile Menu Access

Save

| Select All \| None | Menu Name | Menu Sub Group | Menu Seq |
|---|---|---|---|
| ☑ | Activity Report | Reports | 8 |
| ☑ | Allocate Carts | Setup | 6 |
| ☑ | Cart Averages Report | Reports | 9 |
| ☑ | Cart Detail Report | Reports | 10 |
| ☑ | Cart Putaway Report | Reports | 16 |
| ☑ | Create Orders | Setup | 3 |
| ☑ | Critical Items | Setup | 7 |
| ☑ | Daily Activity | Reports | 11 |
| ☑ | Daily User Activity | Reports | 12 |
| ☑ | Item Exception Report | Reports | 9 |
| ☑ | Item Usage Report | Reports | 10 |
| ☑ | Manage Orders | Report | 4 |
| ☑ | Manage Par Location | Setup | 2 |
| ☑ | Optimization Report | Reports | 13 |
| ☑ | Order History Report | Setup | 5 |
| ☑ | Par Audit Report | Reports | 15 |
| ☑ | Schedule Compliance Report | Reports | 14 |
| ☑ | Setup Par Locations | Setup | 1 |
| ☑ | User Parameters | Setup | 6 |
| ☑ | User Productivity Report | Reports | 14 |

Save

**Figure 58**

## Cycle Count - Menu Access:

Profile Menu Access

Save

| Select All \| None | Menu Name | Menu Sub Group | Menu Seq |
|---|---|---|---|
| ☐ | Activity Report | Reports | 5 |
| ☐ | Allocate Events | Setup | 2 |
| ☐ | Daily Activity | Reports | 7 |
| ☐ | Daily User Activity | Reports | 8 |
| ☐ | Event Summary Report | Reports | 9 |
| ☐ | Item Exception Report | Reports | 6 |
| ☐ | Process Counts | Setup | 4 |
| ☐ | Review Counts | Setup | 3 |
| ☐ | Split Events | Setup | 9 |
| ☐ | User Parameters | Setup | 1 |

Save

**Figure 59**

## Receiving - Menu Access:

Profile Menu Access

Save

| Select All \| None | Menu Name | Menu Sub Group | Menu Seq |
|---|---|---|---|
| ☐ | Activity Report | Reports | 6 |
| ☐ | Allocate Inventory Business Units | Setup | 3 |
| ☐ | Allocate ShipToIDs | Setup | 5 |
| ☐ | ASN Discrepancy Report | Reports | 11 |
| ☐ | Carrier Information | Setup | 2 |
| ☐ | Carrier Report | Reports | 7 |
| ☐ | Daily Activity | Reports | 8 |
| ☐ | Daily User Activity | Reports | 9 |
| ☐ | Deviation Report | Reports | 10 |
| ☐ | Lot/Serial Tracking Report | Reports | 12 |
| ☐ | Parcel Count Report | Reports | 13 |
| ☐ | Release Orders | Setup | 1 |
| ☐ | User Parameters | Setup | 4 |

Save

**Figure 60**

## Par Mgmt Receiving - Menu Access:

Profile Menu Access

Save

| Select All \| None | Menu Name | Menu Sub Group | Menu Seq |
|---|---|---|---|
| ☐ | Activity Report | Reports | 6 |
| ☐ | Allocate Inventory Business Units | Setup | 3 |
| ☐ | Allocate ShipToIDs | Setup | 5 |
| ☐ | ASN Discrepancy Report | Reports | 11 |
| ☐ | Carrier Information | Setup | 2 |
| ☐ | Carrier Information | Setup | 2 |
| ☐ | Carrier Report | Reports | 7 |
| ☐ | Daily Activity | Reports | 8 |
| ☐ | Daily User Activity | Reports | 9 |
| ☐ | Deviation Report | Reports | 10 |
| ☐ | Release Orders | Setup | 1 |
| ☐ | Setup Ship to IDs | Setup | 0 |
| ☐ | User Parameters | Setup | 4 |

Save

**Figure 61**

## Pick - Menu Access:


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

Profile Menu Access

Save

| Select All \| None | Menu Name | Menu Sub Group | Menu Seq |
|---|---|---|---|
| ☐ | Activity Report | Reports | 7 |
| ☐ | Allocate Inventory Business Units | Setup | 3 |
| ☐ | Allocate Location Groups | Setup | 2 |
| ☐ | Allocate Picking Zones | Setup | 11 |
| ☐ | Allocate Priority | Setup | 4 |
| ☐ | Daily Activity | Reports | 8 |
| ☐ | Daily User Activity | Reports | 9 |
| ☐ | Deviation Report | Reports | 10 |
| ☐ | Order Prefix | Setup | 5 |
| ☐ | Release Orders | Setup | 6 |
| ☐ | User Parameters | Setup | 1 |

Save

**Figure 62**

**Note: Par Mgmt Pick has same Menu Access available**

**Putaway - Menu Access:**

Profile Menu Access

Save

| Select All \| None | Menu Name | Menu Sub Group | Menu Seq |
|---|---|---|---|
| ☐ | Activity Report | Reports | 4 |
| ☐ | Allocate Business Units | Setup | 2 |
| ☐ | Daily Activity | Reports | 5 |
| ☐ | Daily User Activity | Reports | 6 |
| ☐ | Deviation Report | Reports | 7 |
| ☐ | Release Orders | Setup | 3 |
| ☐ | User Parameters | Setup | 1 |

Save

**Figure 63**

**Stock Issue - Menu Access:**

Profile Menu Access

Save

| Select All \| None | Menu Name | Menu Sub Group | Menu Seq |
|---|---|---|---|
| ☐ | Allocate Destination Locations | Setup | 7 |
| ☐ | Allocate Distribution Types | Setup | 8 |
| ☐ | Allocate Inventory Business Units | Setup | 3 |
| ☐ | Daily Activity | Reports | 4 |
| ☐ | Daily User Activity | Reports | 5 |
| ☐ | Issue Report | Reports | 6 |
| ☐ | User Parameters | Setup | 1 |

Save

**Figure 64**

### Bin to Bin - Menu Access:

Profile Menu Access

Save

| Select All \| None | Menu Name | Menu Sub Group | Menu Seq |
|---|---|---|---|
| ☐ | Allocate Inventory Business Units | Setup | 2 |
| ☐ | User Parameters | Setup | 1 |

Save

**Figure 65**

### Deliver - Menu Access:

Profile Menu Access

Save

| Select All \| None | Menu Name | Menu Sub Group | Menu Seq |
|---|---|---|---|
| ☐ | Allocate Business Units | Setup | 2 |
| ☐ | Allocate Location Groups | Setup | 3 |
| ☐ | Assign Signatories | Reports | 9 |
| ☐ | Carrier Information | Setup | 5 |
| ☐ | Daily Activity | Reports | 6 |
| ☐ | Daily User Activity | Reports | 7 |
| ☐ | Delivery Report | Reports | 8 |
| ☐ | Exclude Locations | Setup | 4 |
| ☐ | Release Packages | Setup | 11 |
| ☐ | Setup Drop off Locations | Setup | 12 |
| ☐ | ShipTo ID allocation for delivery of stock items | Setup | 10 |
| ☐ | User Parameters | Setup | 1 |

Save

**Figure 66**


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

## Par Mgmt Deliver - Menu Access:

Profile Menu Access

Save

| Select All \| None | Menu Name | Menu Sub Group | Menu Seq |
|---|---|---|---|
| ☐ | Allocate Business Units | Setup | 2 |
| ☐ | Allocate Location Groups | Setup | 3 |
| ☐ | Assign Signatories | Reports | 9 |
| ☐ | Carrier Information | Setup | 5 |
| ☐ | Carrier Information | Setup | 5 |
| ☐ | Daily Activity | Reports | 6 |
| ☐ | Daily User Activity | Reports | 7 |
| ☐ | Delivery Report | Reports | 8 |
| ☐ | Exclude Locations | Setup | 4 |
| ☐ | Setup Locations | Setup | 11 |
| ☐ | ShipTo ID allocation for delivery of stock items | Setup | 10 |
| ☐ | User Parameters | Setup | 1 |

Save

**Figure 67**

## Point of Use - Menu Access:

Profile Menu Access

Save

| Select All \| None | Menu Name | Menu Sub Group | Menu Seq |
|---|---|---|---|
| ☐ | Activity Report | Report | 30 |
| ☐ | Back Order Report | Report | 19 |
| ☐ | Charge Report | Report | 13 |
| ☐ | Compliance Detail Report | Report | 18 |
| ☐ | Compliance Summary Report | Report | 18 |
| ☐ | Create Orders | Setup | 29 |
| ☐ | Critical Items | Setup | 24 |
| ☐ | Daily User Activity Report | Report | 31 |
| ☐ | Department Cart Allocation | Setup | 9 |
| ☐ | Department Device Allocation | Setup | 8 |
| ☐ | Department User Allocation | Setup | 8 |
| ☐ | Expiration Tracking Report | Report | 27 |
| ☐ | Issues W/O Patient Report | Report | 22 |
| ☐ | Item Usage Report | Report | 16 |
| ☐ | Lot/Serial Tracking Report | Report | 15 |
| ☐ | Low Stock Report | Report | 28 |
| ☐ | Maintain Non Cart Items | Setup | 12 |
| ☐ | Manage Consigned Item Order Report | Setup | 32 |
| ☐ | Manage Orders | Report | 25 |
| ☐ | Manage Par Location | Setup | 8 |
| ☐ | Par Optimization Report | Report | 17 |
| ☐ | Physician Usage Report | Report | 20 |
| ☐ | Preference Lists | Setup | 11 |
| ☐ | Process Parameters | Setup | 2 |
| ☐ | Quantity On Hand Report | Report | 21 |
| ☐ | Review Charges/Credits | Report | 14 |
| ☐ | Setup Departments | Setup | 6 |
| ☐ | Setup Par Locations | Setup | 7 |
| ☐ | Setup Physicians | Setup | 3 |
| ☐ | Setup Procedures | Setup | 5 |
| ☐ | Setup Reasons | Setup | 4 |
| ☐ | User Parameters | Setup | 1 |

Save

**Figure 68**

## *Assign Parameters*

This section is used to set parameters for profiles. Users are then assigned to a unique profile. Parameters are settings that can be enabled or disabled based on your organization's business requirements. For example, if you want some users to have the ability to enter counts greater than the par value, you will set up a profile for the users, and enable the **Allow Qty. greater than Par Value** check box. If you don't want other users to have this capability, you will create another profile and not enable this option.

All parameters for Cart Count are displayed below in **Figure 69**

**Cart Count – Profile Parameters:**

Profile Parameters

Save

| 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 Qty. greater than Par Value | ☐ | [Checking this will allow users to enter the count quantity greater than par value] |
| Allow access to Carts allocated to Group Users | ☐ | [Checking this will allow complete access to carts allocated to other users in the group, the activity information still is captured for the user who does the actual count] |
| Disable bulk label printing | ☐ | [Checking this will disable the bulk label printing option] |
| Ignore modified Cart Definitions on Upload | ☐ | [Checking this will ignore errors on modified Cart Definitions while loading the counts into PeopleSoft Interface tables] |
| Charge Capture | ☐ | [Checking this will allow the users to Capture Charges on the handheld from Patient Charge Cards] |
| Default Input | ☐ | [Checking this will default the value to "0" in case of Count Option and to Par Value in case of Request Option on the HHT] |
| Delete Cart Items after upload | ☑ | [Checking this will delete the cart profile (items data) on the HHT after the counts are uploaded to the server] |
| Display FOQ / Max / Par value | ☑ | [Checking this will display FOQ or Max or Par value of the item, Un checking will allow the user to do Blind Counting on the item screen] |
| Edit par value | ☐ | [Checking this will allow handheld users to edit the Par value on the HHT and the Server users to edit the Par value in the Optimization Report. Audit trail is maintained for all the changes] |
| Ignore Putaway qty | ☐ | [Checking this will allow the Putaway Qty greater than Order Qty.Unchecking this will enable the system to generate an error when putaway Qty is greater than Order Qty.] |
| Item Count High% | 100 | [If Item Order % (Qty Ordered / Par Value) value greater than this % value , the transaction will be captured for reporting] |
| Item Count Low% | 0 | [If Item Order % (Qty Ordered / Par Value) value lower than this % value , the transaction will be captured for reporting] |
| Type Code for Item NDC | | [Type Code used for downloading the Item NDC from PeopleSoft] |
| Type Code for Item UPN | | [Type Code used for downloading the Item UPN from PeopleSoft] |
| Mandatory Count | ☐ | [Checking this will make it mandatory for the HHT user to enter Counts for all the items in the Cart / Par Location] |
| Putaway of Cart Items | ☐ | [Checking this will allow the users to do put away of cart items.] |
| Default Count Option (Count/Request) | (•) Count<br>( ) Request<br>( ) None | [Sets the default Item count option on the HHT] |
| Ability to Select count option on HHT | ☐ | [Checking this will enable the user to select the Count Option at the time of counting on the handheld] |
| Max. allowable Count/Request Quantity | 99999999999.9999 | [User will be able to count/request up to the max. allowable quantity set.] |
| Max. allowable number of digits | 11 | [Force user to count/request qty less than number of digits set(this includes numbers and decimal) ] |
| To default all the counts | ☑ | [Checking this parameter will allow the user to default count all the items] |
| Silent Scan | ☐ | [Checking this will mute the scan beep of (Symbol) device(s) ] |
| Sort By Column | ☐ | [Checking this will allow the user to sort the columns on the HHT] |
| Super User | ☐ | [Allows user to view, modify, upload, delete other users data on handheld] |
| Display Warning Message when Count/Request Qty greater than Par | ☐ | [Checking this will display a warning message to the user when the Count /Request quantity is greater than Par] |

Save

**Figure 69**

To enable a parameter, ***click*** in the applicable check box next to it.

**Allow users to do only put away of cart items –** The Putaway of Cart 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 Items ONLY If this option is UNCHECKED, user can perform Cart Count and Put away functions

**Allow Qty. greater than Par Value –** Checking this allows users to enter a count quantity greater than the Par Value.

**Allow access to Carts allocated to Group Users –** Checking this allows the user to access other user's allocated carts. For example, if checked, this user will have the ability to login to the hand held and then download either their allocated carts or those of another user in their group


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

**Disable bulk label printing –** If users select the PRINT option from the Cart Count status screen, it will print label for Par Location/Cart ID header and all items. Selecting this option will disable the PRINT capability from the Cart Count status screen.

**Ignore modified Cart Definition on Upload -** Checking this will allow user to send data to the ERP system even if there is an item error on the upload. If this is not checked, no items will be sent to the ERP system and the user will have to download the items and recount all.

**Charge Capture –** If your organization uses Patient Charge Cards, checking this option will allow HHT user to capture patient charges

**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 option 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 counted cart and items are sent to the server. Unchecked will clear the count information but keep the items on the HHT so that they do not need to be re-downloaded. NOTE: If items are kept on HHT each time, there is the potential the user will not download the most current information. Recommend that you check this option.

**Display FOQ/Max/Par Value –** Checking this option allows users to view FOQ or Max values on the HHT.

**Edit par value –** Checking this allows the user to edit par values from on the HHT. An edited par value for a cart must be uploaded, processed on the ERP, and downloaded again to display it on the HHT.

**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.

**Item Count High% – and Item Count Low% –** These parameters are used in the Cart Exception Report to denote threshold values below and above the entered 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 adjust Par Values over time

**Type Code for item NDC -** This is the type code used for downloading the Item NDC from ERP

**Type Code for item UPN –** This is the Type Code used for downloading the Item UPN from ERP**.**

**Mandatory Count –** If checked, this will force user to enter a value for each and every item on the Cart/Par Location

**Putaway of Cart Items –** Checking this will allow user to putaway cart items.

**Default Count Option –** Sets the default count option on the HHT. Count to have user perform actual counts. Request to have user perform requested quantity count.

**Ability to Select count option on HHT –** Selecting this will allow user to select count option at time of counting items on the HHT.


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

**Max allowable Count/Request quantity –** Enter the maximum allowable mask to use for HHT user. For example, if you want to limit user to 9,999 as the most they can enter then enter 9999.99 in this field.

**Max allowable number of digits –** Value entered in this field will limit maximum number of fields for HHT user. 11 = 999999999.99, if you enter 6 here it would limit HHT user to 9999.99.

**Silent Scan –** Check this to enable scan on the HHT to be silent

**Sort by column –** Checking this will allow the user to sort within the columns of the Item count screen. For example, if the first column on the Item Count screen is Item Id, and you have checked this box, the display will be in Item id order on the HHT

**Super User –** If checked, the selected user will be able to view the records of all users on a given HHT. This can be used in a situation where a user leaves for the day without uploading carts, and his or her supervisor can log in to the same HHT and upload the unsent carts or finish counting the carts

**Display Warning Message when Count/Request Qty greater than Par –** Check this to display a warning message to user when entering a count/request value on the HHT which is greater than the par level qty

When finished selecting all parameters, ***click*** the Save button

**Par Management Cart Count – Profile Parameters:**

Profile Parameters

Save

| 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 editing of Orders | ☑ | [Checking this will allow the user to edit the Order qty, received qty, status through Manage Orders screen for any corrections.] |
| Allow Qty. greater than Par Value | ☑ | [Checking this will allow users to enter the count quantity greater than par value] |
| Allow access to Carts allocated to Group Users | ☐ | [Checking this will allow complete access to carts allocated to other users in the group, the activity information still is captured for the user who does the actual count] |
| Disable bulk label printing | ☐ | [Checking this will disable the bulk label printing option] |
| Ignore modified Cart Definitions on Upload | ☑ | [Checking this will ignore errors on modified Cart Definitions while loading the counts into PeopleSoft Interface tables] |
| Charge Capture | ☑ | [Checking this will allow the users to Capture Charges on the handheld from Patient Charge Cards] |
| Default Input | ☐ | [Checking this will default the value to "0" in case of Count Option and to Par Value in case of Request Option on the HHT] |
| Delete Cart Items after upload | ☑ | [Checking this will delete the cart profile (items data) on the HHT after the counts are uploaded to the server] |


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

| | | |
|---|---|---|
| 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] |
| Allow editing of Par value on the HHT | ☑ | [Checking this will allow handheld users to edit the Par value on the HHT and the Server users to edit the Par value in the Optimization Report. Audit trail is maintained for all the changes] |
| Printing a picklist | ☐ | [Checking this will print a picklist while creating a stock requisition] |
| Ignore Putaway qty | ☐ | [Checking this will allow the Putaway Qty greater than Order Qty.Unchecking this will enable the system to generate an error when putaway Qty is greater than Order Qty.] |
| Item Count High% | 100 | [If Item Order % (Qty Ordered / Par Value) value greater than this % value , the transaction will be captured for reporting] |
| Item Count Low% | 0 | [If Item Order % (Qty Ordered / Par Value) value lower than this % value , the transaction will be captured for reporting] |
| Type Code for Item NDC | | [Type Code used for downloading the Item NDC from PeopleSoft] |
| Type Code for Item UPN | | [Type Code used for downloading the Item UPN from PeopleSoft] |
| Mandatory Count | ☐ | [Checking this will make it mandatory for the HHT user to enter Counts for all the items in the Cart / Par Location] |
| Printer Name for Pick list Print | | [Printer Name for Pick list Print while posting Stock data to ERP] |
| Post Stock Items | ☐ | [Checking this will post the items while sending Stock data to ERP] |
| Putaway of Cart Items | ☐ | [Checking this will allow the users to do put away of cart items.] |
| Default Count Option (Count/Request) | ◉ Count<br>○ Request<br>○ None | [Sets the default Item count option on the HHT] |
| Ability to Select count option on HHT | ☑ | [Checking this will enable the user to select the Count Option at the time of counting on the handheld] |
| Max. allowable Count/Request Quantity | 99999999999.9999 | [User will be able to count/request up to the max. allowable quantity set.] |
| Max. allowable number of digits | 11 | [Force user to count/request qty less than number of digits set(this includes numbers and decimal)] |
| Sort By Column | ☑ | [Checking this will allow the user to sort the columns on the HHT] |
| Super User | ☐ | [Allows user to view, modify, upload, delete other users data on handheld] |
| Verify Consign Items | ☐ | [Checking this will verify the items while posting Consign data to ERP] |
| Verify Nonstock Items | ☐ | [Checking this will verify the items while posting NonStock data to ERP] |
| | Save | |

**Figure 70**

**Allow users to do only put away of cart items –** The Putaway of Cart 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 Items ONLY If this option is UNCHECKED, user can perform Cart Count and Put away functions

**Allow editing of orders –** If this option is checked, web user can edit orders that have been created. Fields available for editing are Order quantity, Received quantity, and status.

**Allow Qty. greater than Par Value –** Checking this allows users to enter a count quantity greater than the Par Value.

**Allow access to Carts allocated to Group Users –** Checking this allows the user to access other user's allocated carts. For example, if checked, this user will have the ability to login to the hand held and then download either their allocated carts or those of another user in their group

**Disable bulk label printing –** If users select the PRINT option from the Cart Count status screen, it will print label for Par Location/Cart ID header and all items. Selecting this option will disable the PRINT capability from the Cart Count status screen.

**Ignore modified Cart Definition on Upload -** Checking this will allow user to send data to the ERP system even if there is an item error on the upload. If this is not checked, no items will be sent to the ERP system and the user will have to download the items and recount all.

**Charge Capture –** If your organization uses Patient Charge Cards, checking this option will allow HHT user to capture patient charges

**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 option 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 counted cart and items are sent to the server. Unchecked will clear the count information but keep the items on the HHT so that they do not need to be re-downloaded. NOTE: If items are kept on HHT each time, there is the potential the user will not download the most current information. Recommend that you check this option.

**Display FOQ/Max/Par Value –** Checking this option allows users to view FOQ or Max values on the HHT.

**Allow editing of par value on the HHT –** Checking this allows the user to edit par values from on the HHT. An edited par value for a cart must be uploaded, processed on the ERP, and downloaded again to display it on the HHT.

**Printing a picklist –** If your organization uses @Par Par Mgmt Pick product, check this option to print a Pick List for picking items

**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.

**Item Count Low – and Item Count High –** These parameters are used in the Cart Exception Report to denote threshold values below and above the entered 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 adjust Par Values over time

**Type Code for item NDC -** This is the type code used for downloading the Item NDC from ERP

**Type Code for item UPN –** This is the Type Code used for downloading the Item UPN from ERP**.**

**Mandatory Count –** If checked, this will force user to enter a value for each and every item on the Cart/Par Location.

**Printer name for Pick list Print –** If the “Printing a picklist” option has been checked, enter the Name of the printer to print the pick list on (if unsure, contact your IT department)

**Post Stock items –** Check this option to post Stock items to the server

**Putaway of Cart Items –** Checking this will allow user to putaway cart items.

**Default Count Option –** Sets the default count option on the HHT. Count to have user perform actual counts. Request to have user perform requested quantity count.

**Ability to Select count option on HHT –** Selecting this will allow user to select count option at time of counting items on the HHT.

**Max allowable Count/Request quantity –** Enter the maximum allowable mask to use for HHT user.  For example, if you want to limit user to 9,999 as the most they can enter then enter 9999.99 in this field.

**Max allowable number of digits –** Value entered in this field will limit maximum number of fields for HHT user.  11 = 999999999.99, if you enter 6 here it would limit HHT user to 9999.99.

**Sort by column –** Checking this will allow the user to sort within the columns of the Item count screen.   For example, if the first column on the Item Count screen is Item Id, and you have checked this box, the display will be in Item id order on the HHT

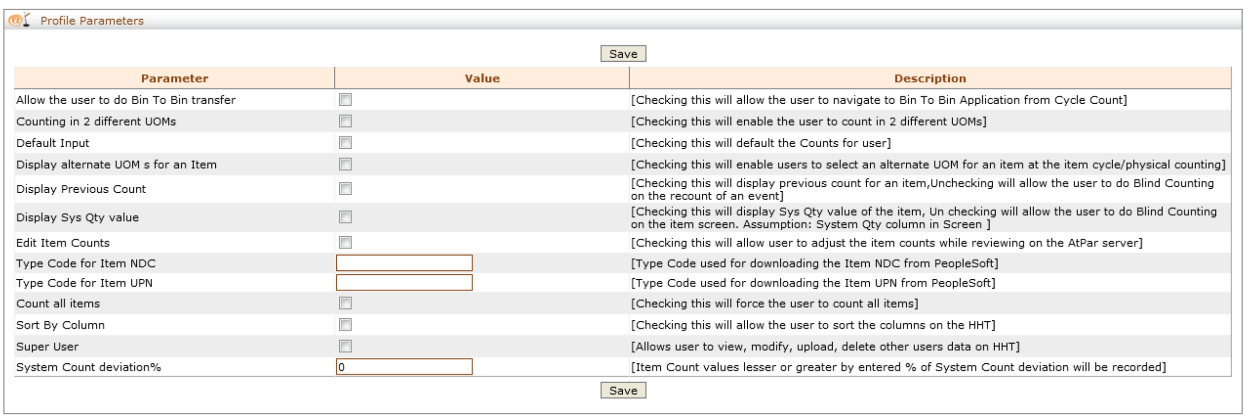
**Super User –** If checked, the selected user will be able to view the records of all users on a given HHT.   This can be used in a situation where a user leaves for the day without uploading carts, and his or her supervisor can log in to the same HHT and upload the unsent carts or finish counting the carts

**Verify consign items –** Check option to verify consignment items during posting of data

**Verify Nonstock items -** Check option to verify Non-stock items during posting of data

When finished selecting all parameters, ***click*** the Save button.

**Cycle Count – Profile Parameters:**


Profile Parameters

Save

| Parameter | Value | Description |
|---|---|---|
| Allow the user to do Bin To Bin transfer | | [Checking this will allow the user to navigate to Bin To Bin Application from Cycle Count] |
| Counting in 2 different UOMs | | [Checking this will enable the user to count in 2 different UOMs] |
| Default Input | | [Checking this will default the Counts for user] |
| Display alternate UOM s for an Item | | [Checking this will enable users to select an alternate UOM for an item at the item cycle/physical counting] |
| Display Previous Count | | [Checking this will display previous count for an item,Unchecking will allow the user to do Blind Counting on the recount of an event] |
| Display Sys Qty value | | [Checking this will display Sys Qty value of the item, Un checking will allow the user to do Blind Counting on the item screen. Assumption: System Qty column in Screen ] |
| Edit Item Counts | | [Checking this will allow user to adjust the item counts while reviewing on the AtPar server] |
| Type Code for Item NDC | | [Type Code used for downloading the Item NDC from PeopleSoft] |
| Type Code for Item UPN | | [Type Code used for downloading the Item UPN from PeopleSoft] |
| Count all items | | [Checking this will force the user to count all items] |
| Sort By Column | | [Checking this will allow the user to sort the columns on the HHT] |
| Super User | | [Allows user to view, modify, upload, delete other users data on HHT] |
| System Count deviation% | 0 | [Item Count values lesser or greater by entered % of System Count deviation will be recorded] |

Save

**Figure 71**

**Allow the user to do Bin to Bin transfer –** Checking this option will allow user access to the Bin to Bin transfer application.

**Counting in 2 different UOMs –** Checking this option will allow the hand held user to count in two different Units of Measure. Same Item on the same Cart may allow 2 different units of measure.

**Default Input –** Checking this option will automatically default the system quantity on hand into the count quantity field for all items on the HHT.  This is not recommended in this product as normal operating procedures require the user to count each item.  IF this is unchecked, user will have to perform a blind count.

**Display Alternate UOMs for an Item –** Check this option to allow HHT user the ability to count by an alternate item UOM.  If your organization doesn't have an alternate UOM leave this blank.

**Display Previous count –** If the **Recount and New option** on the hand held is checked, and this is checked the previous count quantity **will** display on the hand held. If the **Recount and New option** on the hand held is checked, and this is unchecked the previous count quantity **will NOT** display on the hand held.

**Display Sys Qty Value –** Leaving this option unchecked will ensure the user does a ***"Blind"*** counting on the item screen. If you check this box, the hand held will display the Sys Qty (your ERP system) value of the item. If you check this, you will need to check the System Qty box in ***"Screen Display Setup"***.

**Edit Item Counts –** Checking this box will allow the Web user the ability to edit Item Counts on the **@Par Server**.

**Type Code for item NDC –** This is the type code used for downloading the Item NDC from ERP.

**Type Code for item UPN –** This is the Type Code used for downloading the Item UPN from ERP**.**

**Count all items –** Checking this option will require the user to enter a count value for each item on the counting event.

**Sort by Column –** Checking this will allow the user to sort within the columns of the Item count screen. For example, if the first column on the Item Count screen is Item Id, and you have checked this box, the display will be in Item id order on the HHT

**Super User –** If checked, the selected user will be able to view the records that have been downloaded on a HHT. This can be used in a situation where a user leaves for the day without uploading events, and his or her supervisor can log in at a later time and upload the unsent counts, on **THAT** HHT.

**System Count Deviation % –** Sets the Count Deviation percent value, plus or minus from the System Qty – Actual Count Qty. For example, assume the following on item #1957 we set this option to 20 (for 20%):
When finished selecting all parameters, ***click*** the Save button.

**Receiving – Profile Parameters:**


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

Profile Parameters

Save

| Parameter | Value | Description |
|---|---|---|
| Allows Receive Qty > Open PO Qty | | [Checking this will allow users to enter unlimited receive quantity. Un checking this will allow users to enter receive quantity within receiving tolerances] |
| Default Date Range | 30 | [Default From and To Date range for PO search on the HHT] |
| Default Input | | [Checking this will default the Open Qty as Receipt Qty for an item] |
| Display PO comments on the HHT | | [Selection of this parameter will display PO comments on the HHT as a popup message] |
| Display order / received quantity value | | [Checking this will display order / received quantity for an item to be received. Un checking will allow users to do blind receiving] |
| Editable ShipTo ID field | | [Checking this will allow user to edit/select the ShipTo ID] |
| Edit/Select Receiving UOM on the HHT | | [Selection of this parameter allows you user to edit/select the UOM value on the HHT] |
| Type Code for Item NDC | | [Type Code used for downloading the Item NDC from PeopleSoft] |
| Item Receive High | 100 | [If the Item Receive % value (= PO Qty - Receive Qty / PO Qty) is greater than this % value the transaction will be recorded for reporting.This will be used for ASN Discrepancy Report also.] |
| Item Receive Low | 0 | [If the Item Receive % value (= PO Qty - Receive Qty / PO Qty) is lesser than this % value the transaction will be recorded for reporting.This will also apply to ASN Discrepancy.] |
| Type Code for Item UPN | | [Type Code used for downloading the Item UPN from PeopleSoft] |
| Non PO Items Receive | | [Checking this will allow receiving of Non PO items on HHT] |
| Parcel Count | | [Checking this allow the receiver to perform parcel counts on the HHT] |
| Purchasing/Inter Unit Receiving | Purchasing<br>Inter Unit<br>Both | [Based on the selected type, Purchasing and/or Inter Unit orders should be allowed to receive.] |
| ShipTo ID required for download | | [Checking this will force the user to enter/select the ShipTo ID] |
| Search ASN POs | | [Checking this will search for ASN POs along with regular ones.] |
| Realtime upload of Non PO item receipts to server | | [Checking this will upload the Non PO receive event information to server if network connection is available] |
| Sort By Column | | [Checking this will allow the user to sort the columns on the HHT] |
| Super User | | [Allows user to view, modify, upload, delete other users data on HHT] |
| Zero Receipt Warning Message | | [Selection of this parameter will give a warning message to the Hand Held User when they enter zero as the receipt quantity] |

Save

**Figure 72**

**Allows Receive Qty > Open PO qty** – Checking this allows users to enter a receive quantity greater than the order quantity of an open PO.

**Default Date Range –** Used for a default date to search for items on an open PO. Enter a value in days.

**Default Input** – Checking this option will automatically default the Open PO ordered Qty into the Receive Qty field on the HHT.

- This is useful when majority of the item quantities of a PO are received in full so user can edit exceptions without entering line by line quantities

**Display PO comments on the HHT** – Checking this will allow PO comments to display as a pop up message.

**Display order/received quantity value –** Checking this option will display the received and open PO order quantity on the HHT. Uncheck to require user to perform a blind count.

**Editable ShipTo ID field** – Checking this will allow user to edit the Ship To ID value on the HHT.

**Edit/Select Receiving UOM on the HHT** – Checking this will allow user to edit the UOM on the HHT.

**Type Code for Item NDC –** This is the type code used for downloading the Item NDC from ERP.

**Item Receive High –** Items received with a percentage less than entered amount will display on report.

**Item Receive Low –** Items received with a percentage greater than entered amount will display on report.

**Type Code for item UPN –** This is the Type Code used for downloading the Item UPN from ERP.

**Non PO Items Receive –** If this option is checked, user will have ability to scan/enter NON PO items to receive. There will be an additional button (NON PO) appear on the HHT.

**Parcel Count –** Checked will provide a Parcel Count button to allow HHT user the ability to scan packages from manifests while receiving packages dockside. This will allow a matching count of packages scanned vs. packages manifest records as delivered to your organization's dock.

**Purchasing/Inter Unit Receiving –** Checking this option will allow user to receiving Inter Unit receiving items.

**ShipTo ID required for download** – This value has to be entered on the HHT in order to download a PO from ERP system.

**Search ASN POs –** Checking this option will search for ASN POs along with regular POs currently being searched.

**Realtime upload of Non PO Item receipts to server –** Checking this will allow update to server within a wireless environment

**Sort by Column –** Checking this will allow the user to sort within the columns of the Item count screen. For example, if the first column on the Item Count screen is Item Id, and you have checked this box, the display will be in Item id order on the HHT

**Zero Receipt Warning –** Check this to provide HHT user with message that a zero value has been entered in receive quantity field. PeopleSoft processes will disallow a zero quantity.

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

**Zero Receipt Warning Message –** With this option checked when HHT user enters a 0 in the Receive Quantity field, it will provide a warning message.

When finished selecting all parameters, ***click*** the Save button.

**Par Management Receiving – Profile Parameters:**

The Par Management receiving product has the same Profile Parameters as the Receiving product.

**Pick – Profile Parameters:**

Profile Parameters

Save

| Parameter | Value | Description |
|---|---|---|
| Allow the user to do Bin To Bin transfer | ☐ | [Checking this will allow the user to navigate to Bin To Bin Application from Pick Plan] |
| Allow more than allocated qty | ☐ | [Checking this option will allow users to enter more than allocated Quantity] |
| Allow more than requested qty | ☐ | [Checking this option will allow users to pick more than requested quantity] |
| Default Input | ☐ | [Checking this will default the Counts for user] |
| Type Code for Item NDC | | [Type Code used for downloading the Item NDC from PeopleSoft] |
| Item Pick High % | 80 | [Item Pick % values greater than entered % value will be recorded] |
| Item Pick Low | 50 | [Item pick % values lesser or equal to entered % value will be recorded] |
| Type Code for Item UPN | | [Type Code used for downloading the Item UPN from PeopleSoft] |
| Storage Location check Required | ☐ | [Checking this option will force user entered location is same as Storage location or not] |
| Pick all items | ☑ | [Checking this will force the user to Pick all items in a given Pick Plan before sending] |
| Allow picking from multiple storage locations | ☐ | [Checking this will allow the user to pick items from multiple storage locations for a pick line] |
| Shipping Label Print Options | ◉ None<br>○ Print Header Label only to a Mo....<br>○ Print Delivery Ticket only to a....<br>○ Print Header Label to a Mobile .... | [Use this parameter to define the type of Shipping Label to be printed from the Hand Held after picking is complete] |
| Sort By Column | ☐ | [Checking this will allow the user to sort the columns on the HHT] |
| Super User | ☐ | [Allows user to view, modify, upload, delete other users data on HHT] |

Save

**Figure 73**

**Allow the user to do Bin to Bin transfer –** Checking this option will allow user access to the Bin to Bin transfer application.

**Allow more than allocated qty** – Checking this allows the user to enter a pick quantity more than the allocated quantity.

**Allow more than requested qty** – Checking this allows the user to pick more than requested quantity.

**Default Input** – Checking this option will automatically default the pick quantity with requested quantity on the HHT.

**Type Code for item NDC –** This is the Type Code used for downloading the Item NDC from ERP.

**Item Pick High% –** Item picked % less than this amount will be displayed.

**Item Pick Low –** Item picked % greater than this amount will be displayed.

**Type Code for item UPN –** Type Code used for downloading the Item UPN from ERP.

**Storage Location check Required –** Checking this will display a field on the HHT that the user must enter or scan data for. If the Storage Location displayed for the item doesn’t match the data in this additional field on the HHT, the user will not be allowed to pick the item.

**Pick all items –** Checking this option will force user to put a pick quantity in all items on the pick plan before processing to the ERP system.

**Allow picking from multiple storage locations –** Checking this option allows user to pick from multiple locations for an item.

**Shipping Label Print Options –** Checking any option other than none will allow HHT users to print Delivery Ticket report or Pick Labels

- Print Header Label only to a mobile printer
- Printer Delivery Ticket only to a stationary printer
- Printer Header Label to a mobile printer and Delivery Ticket to a stationary printer

**Sort by Column –** Checking this will allow the user to sort within the columns of the Item count screen. For example, if the first column on the Item Count screen is Item Id, and you have checked this box, the display will be in Item id order on the HHT

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

When finished selecting all parameters, ***click*** the Save button.

### Par Management Pick – Profile Parameters:

For Meditech ERP system, there is one additional Profile Parameter as seen in **Figure 69** below:

| | | |
|---|---|---|
| Printing the Patient charge labels | ☐ | [Checking this will enable the Printing of the Patient Charge Labels after posting the Pick requisition in Meditech] |

**Figure 74**

### Putaway – Profile Parameters:

Profile Parameters

Save

| Parameter | Value | Description |
|---|---|---|
| Allow the user to do Bin To Bin transfer | ☐ | [Checking this will allow the user to navigate to Bin To Bin Application from Putaway] |
| Allow greater than Base Quantity | ☐ | [Checking this option will allow users to enter greater than Base quantity to be PutAway] |
| Allow less than Base Quantity | ☑ | [Checking this option will allow users to enter less than Base Quantity to be Put Away, into the handheld device] |
| Default Input | ☐ | [Checking this will default the Counts for user] |
| Display Receive Qty | ☐ | [Checking this will display receive qty for the item, Un checking will force the user to do blind putaway] |
| Type Code for Item NDC | | [Type Code used for downloading the Item NDC from PeopleSoft] |
| Item Putaway High | 100 | [Item Putaway % values greater than entered % value will be recorded] |
| Item Putaway Low | 0 | [Item putaway % values lesser or equal to entered % value will be recorded] |
| Type Code for Item UPN | | [Type Code used for downloading the Item UPN from PeopleSoft] |
| Storage Location check Required | ☐ | [Checking this option will force the user to scan the Put Away Storage Location at the time of Put Away to confirm if it is the right storage location] |
| Putaway all items | ☐ | [Checking this will force the user to Putaway all items] |
| Purchasing/Inter Unit Receiving | ◉ Purchasing<br>○ Inter Unit<br>○ Both | [Based on the selected type, Purchasing and/or Inter Unit orders should be allowed to receive.] |
| Sort By Column | ☐ | [Checking this will allow the user to sort the columns on the HHT] |
| Super User | ☐ | [Allows user to view, modify, upload, delete other users data on HHT] |

Save

**Figure 75**

**Allow the user to do Bin to Bin transfer –** Checking this option will allow user access to the Bin to Bin transfer application.

**Allow greater than Base Quantity** – Checking this allows the user to enter a quantity greater than Base quantity to be Putaway.

**Allow less than Base Quantity** – Checking this allows the user to enter a quantity less than Base quantity to be Putaway.

**Default Input** – Checking this option will automatically default the putaway quantity from the base quantity counts on the HHT.

**Display Receive Qty. -** Checking this will display the receive quantity on the HHT. If this option is unchecked it will force the user to perform a blind count.

**Type Code for item NDC –** This is the Type Code used for downloading the Item NDC from ERP.

**Item Putaway High –** Items Putaway less than this percentage amount will display on report.

**Item Putaway Low –** Items Putaway greater than this percentage amount will display on report.

**Type Code for item UPN –** Type Code used for downloading the Item UPN from ERP.

**Storage Location check Required –** Checking this will display a field on the HHT that the user must enter or scan data for. If the Storage Location displayed for the item doesn't match the data in this additional field on the HHT, the user will not be allowed to putaway the item.

**Putaway all items –** Checking this option will require user to enter a putaway value on all items.

**Purchasing/Inventory Unit Receiving –** Checking this option will allow user to receiving Inventory Unit receiving items.

**Sort by Column –** Checking this will allow the user to sort within the columns of the Item count screen. For example, if the first column on the Item Count screen is Item Id, and you have checked this box, the display will be in Item id order on the HHT

**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 data, and his or her supervisor can log in at a later time and upload the unsent data.

When finished selecting all parameters, ***click*** the Save button.

**Stock Issue – Profile Parameters:**

Profile Parameters

Save

| Parameter | Value | Description |
|---|---|---|
| Allow the user to do Bin To Bin transfer | ☐ | [Checking this will allow the user to navigate to Bin To Bin Application from Stock Issue] |
| Return Items | ☐ | [Checking this will allow the user to do item returns] |
| Auto add to issue on item scan | ☐ | [Checking this will add an item to issue after item scan] |
| Default Unit Of measure | | [Default Unit of measure will appear on handheld] |
| Display the DISPLAY ALL button on Item Inquiry | ☑ | [Checking this will display the DISPLAY ALL button on Item Inquiry screen] |
| Edit Business Unit on Handheld | ☐ | [Selection of this parameter allows the user to edit the Business Unit on the handheld] |
| Issue To user required | ☐ | [Checking this will force the user to enter user id of the person requesting items] |
| Type Code for Item NDC | | [Type Code used for downloading the Item NDC from PeopleSoft] |
| Type Code for Item UPN | | [Type Code used for downloading the Item UPN from PeopleSoft] |
| Patient ID required | ☐ | [Checking this will force the user to enter patient id at the time of issuing items] |
| Department ID required | ☐ | [Checking this will force the user to enter Department ID at the time of issuing items] |
| Max. allowable Issue Quantity | 99999999999.9999 | [User will be able to issue up to the max. allowable quantity set.] |
| Max. allowable number of digits | 11 | [Force user to issue qty less than number of digits set(this includes numbers and decimal)] |
| Signature Confirmation | ☐ | [Checking this will force the user to take the signature confirmation from the user after issuing items] |
| Sort By Column | ☐ | [Checking this will allow the user to sort the columns on the HHT] |
| Storage Location required | ☐ | [Checking this will force the user to enter storage location at the time of issuing items] |
| Super User | ☐ | [Allows user to view, modify, upload, delete other users data on handheld] |

Save

**Figure 76**

**Allow the user to do Bin to Bin transfer –** Checking this option will allow user access to the Bin to Bin transfer application.

**Return Items –** Return button will appear on HHT if this option is checked. This will allow the HHT user to return items.

**Auto add to issue on item scan –** Checking this will automatically add an item to Issue after the item is scanned.


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

**Default Unit of measure –** Enter the Default UOM to appear on the HHT.

**Display the DISPLAY ALL button on Item Inquiry –** This option will place the Display All button on the Item Inquiry screen.

**Edit Business Unit on Handheld –** Checking this box will allow the hand held user to edit a BU.

**Issue To user required –** Checking this box requires the User to enter the Requesting User's User ID.

**Type Code for item NDC –** This is the Type Code used for downloading the Item NDC from ERP.

**Type Code for item UPN –** Type Code used for downloading the Item UPN from ERP.

**Patient ID required –** Checking this box requires the HHT user to enter the Patient ID for this issue.

**Department ID required –** Selecting this option will force the HHT user to enter a Department ID before an issue can be created.

**Max allowable Issue Quantity –** Enter the maximum allowable mask to use for HHT user.  For example, if you want to limit user to 9,999 as the most they can enter then enter 9999.99 in this field.

**Max allowable number of digits –** Value entered in this field will limit maximum number of fields for HHT user.  11 = 999999999.99, if you enter 6 here it would limit HHT user to 9999.99.

**Signature Confirmation –** Checking this box requires the HHT user to obtain a signature upon issuing items.

**Sort by column –** Checking this will allow the user to sort within the columns of the Item count screen.   For example, if the first column on the Item Count screen is Item Id, and you have checked this box, the display will be in Item id order on the HHT

**Storage Location Required –** Checking this will display a field on the HHT that the user must enter or scan data for.  If the Storage Location displayed for the item doesn't match the data in this additional field on the HHT, the user will not be allowed to putaway the item.

**Super User** – If checked, 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 data, and his or her supervisor can log in at a later time and upload the unsent data.

When finished selecting all parameters, ***click*** the Save button.

**Bin to Bin – Profile Parameters:**

Profile Parameters

Save

| Parameter | Value | Description |
|---|---|---|
| Type Code for Item NDC | | [Type Code used for downloading the Item NDC from PeopleSoft] |
| Type Code for Item UPN | | [Type Code used for downloading the Item UPN from PeopleSoft] |
| Sort By Column | ☐ | [Checking this will allow the user to sort the columns on the HHT] |

Save

Figure 77

**Type Code for item NDC –** This is the Type Code used for downloading the Item NDC from ERP.

**Type Code for item UPN –** Type Code used for downloading the Item UPN from ERP.

**Sort by Column –** Checking this will allow the user to sort within the columns of the Item count screen. For example, if the first column on the Item Count screen is Item Id, and you have checked this box, the display will be in Item id order on the HHT

When finished selecting all parameters, ***click*** the Save button.

**Deliver – Profile Parameters:**

Profile Parameters

Save

| Parameter | Value | Description |
|---|---|---|
| Auto Get Enabled | ☑ | [Checking this will automatically download upon scan of Trk# / PO# / Location] |
| Auto Pick Enabled | ☑ | [Checking this will automatically download and puts the data in Pick Status upon scan of Trk# / PO# / Location] |
| Default Date Range for downloading | 5 | [Default From and To Date range for search on the handheld] |
| Delivery Location Confirmation | ☐ | [Checking this verify the delivery location on records and delivery location scanned while delivering the items] |
| Allow print delivery receipts to network printer | ☐ | [Checking this will allow users to print delivery receipts to network printer] |
| Allow print delivery receipts to mobile printer | ☐ | [Checking this will allow users to print delivery receipts to mobile printer] |
| Display PO comments on the handheld | ☑ | [Selection of this parameter will display PO comments on the handheld as a popup message] |
| Enable Load Event | ☐ | [Checking this will enable Load Event on the HHT] |
| Enable Unload Event | ☐ | [Checking this will enable Unload Event on the HHT] |
| Handover to a drop off location | ☑ | [Checking this will allow the user to hand over the items to a Location Group ] |
| Signature Confirmation | ☐ | [Checking this will force the user to take the signature confirmation from the recepient] |
| Pick Confirmation required | ☑ | [Checking this will force the user to confirm the items pickup] |
| Location/PO ID/Trk# is mandatory to download | ☑ | [Checking this will force the user to download the items by providing Location or PO ID or Trk#] |
| Reset Date Range | ☑ | [Checking this will reset the date range after downloading items on the Status screen (HHT) in a given session] |
| Realtime upload of deliver event to server | ☐ | [Checking this will upload the deliver event information to server if network connection is available] |
| Realtime upload of load event to server | ☐ | [Checking this will upload the load event information to server if network connection is available] |
| Realtime upload of pick event to server | ☐ | [Checking this will upload the pick event information to server if network connection is available] |
| Realtime upload of unload event to server | ☐ | [Checking this will upload the unload event information to server if network connection is available] |
| Show Sign Screen | ☑ | [Checking this will allow the user to see the Sign Screen On the HHT] |
| Sort By Column | ☑ | [Checking this will allow the user to sort the columns on the HHT] |

Save

Figure 78

**Auto Get Enabled –**

**Auto Pick Enabled –**

**Default Date range for downloading** - Default date range in number of days the hand held will search, starting with today's date and searching backward the specified number of days.

**Delivery Location Confirmation –** Checking this option will allow scanning of the Deliver to location bar code to ensure package is delivered to correct location.

**Allow print delivery receipts to network printer –** Checking this will allow the user to print a delivery receipt to any printer set up and available through the **@Par Middle Tier** Server.

**Allow print delivery receipts to mobile printer –** Checking this will allow the user to print a delivery receipt to any mobile printer available

**Display PO comments on the handheld –** Checking this will display any PO comments on the hand held in a pop up window.

**Enable Load Event –**

**Enable Unload Event –**

**Hand over to a drop off location –** Checking this will allow the user to hand over or assign items to another user in the same group as set up by Supervisor in Define User Groups.

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

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

**Location/PO ID/Trk# is mandatory to download –** Checking this option requires the user to provide the **Location** or **PO ID** or **Tracking No** when downloading items to deliver.

**Reset date range –** With this option checked, the date range on the Hand held device will reset after downloading items.

**Realtime upload of deliver event to server** – Checking this option will upload the deliver event information to the ERP Production server via the network as soon as it is delivered

**Realtime upload of load event to server** – Checking this option will upload the load event information to the ERP Production server via the network as soon as it is loaded.

**Realtime upload of pick event to server** – Checking this option will upload the picked event information to the ERP Production server via the network as soon as it is picked.

**Realtime upload of unload event to server** – Checking this option will upload the unload event information to the ERP Production server via the network as soon as it is unloaded.

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

**Sort by Column –** Checking this will allow the user to sort within the columns of the Item count screen. For example, if the first column on the Item Count screen is Item Id, and you have checked this box, the display will be in Item id order on the HHT

When finished selecting all parameters, ***click*** the 

button.

**Par Mgmt Deliver – Profile Parameters:**

The Par Management Deliver product has the same Profile Parameters as the Deliver product.



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

## *Assign Screen Display*

The Assign Screen Display allows users to modify some of the HHT screens from the default screen displays if desired.

***Select*** the **Assign Screen Display** link corresponding with the product you wish to view.

The workflow remains the same regardless of product.

**Cart Count - Client Screens Configuration:**

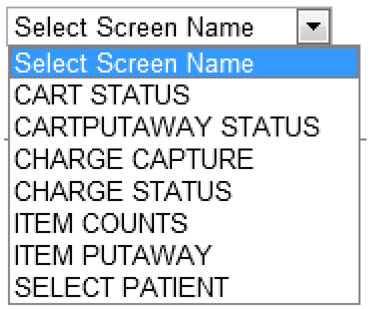
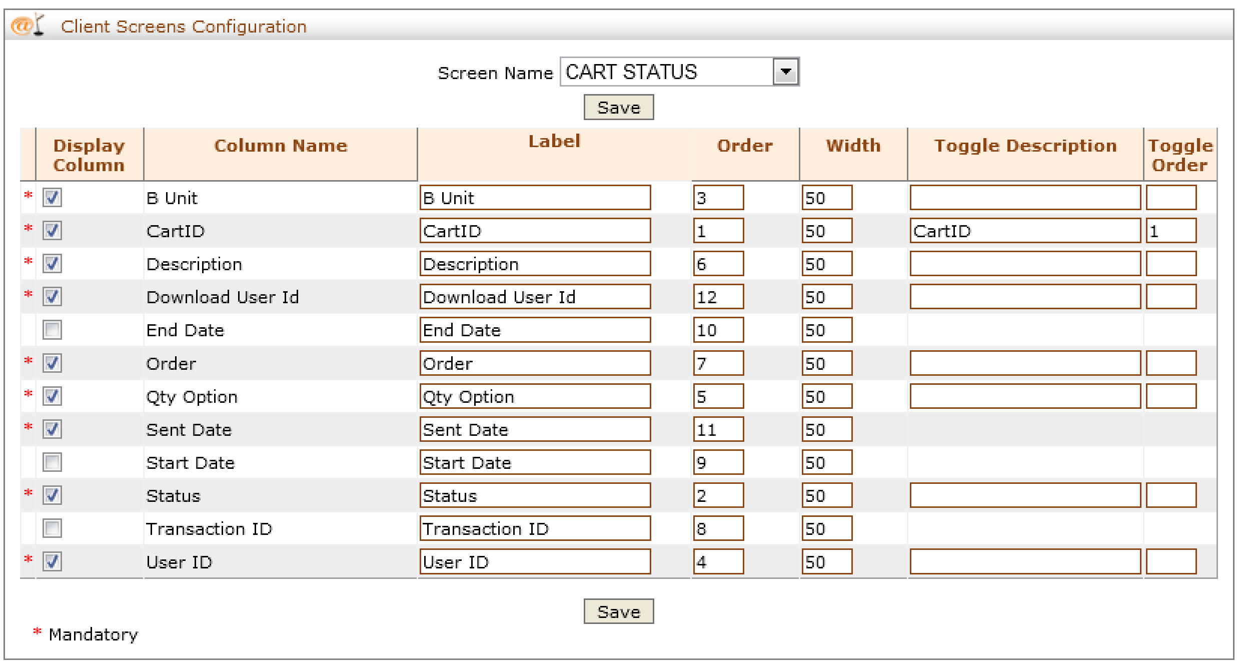



**Figure 79**

**Cart Status – Client Screens Configuration:**




| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | B Unit | B Unit | 3 | 50 | | |
| * | ☑ | CartID | CartID | 1 | 50 | CartID | 1 |
| * | ☑ | Description | Description | 6 | 50 | | |
| * | ☑ | Download User Id | Download User Id | 12 | 50 | | |
| | ☐ | End Date | End Date | 10 | 50 | | |
| * | ☑ | Order | Order | 7 | 50 | | |
| * | ☑ | Qty Option | Qty Option | 5 | 50 | | |
| * | ☑ | Sent Date | Sent Date | 11 | 50 | | |
| | ☐ | Start Date | Start Date | 9 | 50 | | |
| * | ☑ | Status | Status | 2 | 50 | | |
| | ☐ | Transaction ID | Transaction ID | 8 | 50 | | |
| * | ☑ | User ID | User ID | 4 | 50 | | |

**Figure 80**

To display a column that is not being displayed on the HHT, ***click*** on the check box under **Display Column.**

To change a name of an existing label, type in the new description you want in the **Label** column.

To change the order (left to right) that a column will appear on the HHT, enter the number under the **Order** column. For example, if you want the Description to appear first, enter a 1 in this column.

To change the width of a column, enter the new size numerically in the **Width** column.

Some fields may be Toggle field, fields that can switch from one description to another. If you want to change a Toggle Switch from Par Location to Cart ID, simply type Cart ID in the **Toggle Description** column.

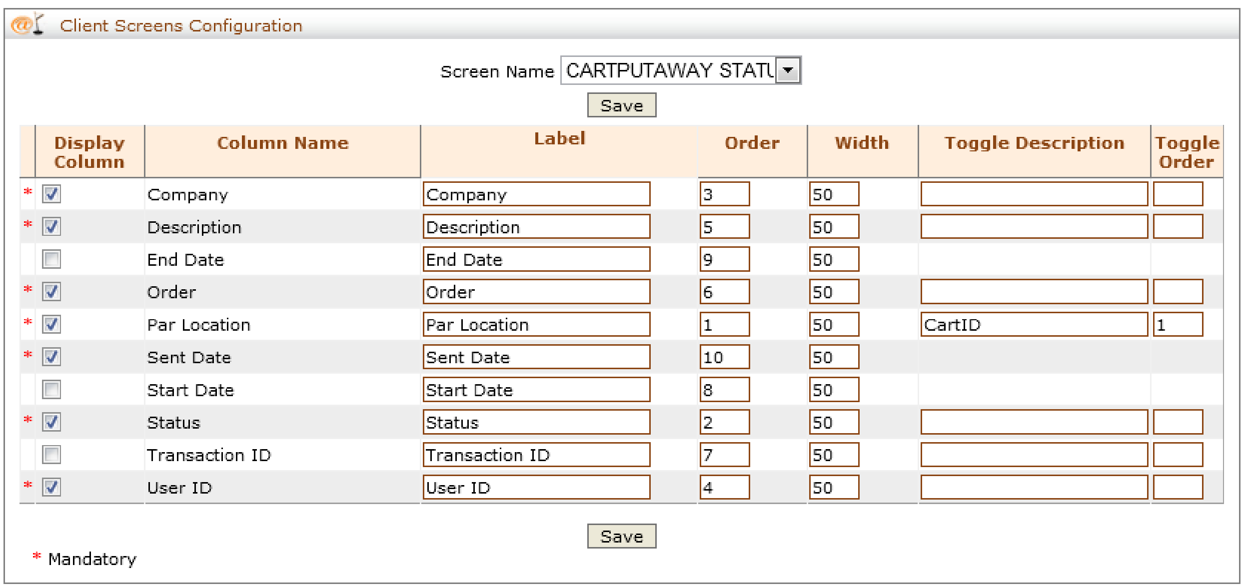
To change the order a Toggle button label appears in, type in the number you want in the **Toggle Order** column.

To save changes ***click*** on the Save button.

When finished selecting all parameters, ***click*** the Save button and then ***click*** the **X**  and return to the previous menu

The process will remain the same for all Products and Screens.

**Cart Putaway Status - Client Screens Configuration:**



Client Screens Configuration

Screen Name CARTPUTAWAY STATU

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Company | Company | 3 | 50 | | |
| * | ☑ | Description | Description | 5 | 50 | | |
| | ☐ | End Date | End Date | 9 | 50 | | |
| * | ☑ | Order | Order | 6 | 50 | | |
| * | ☑ | Par Location | Par Location | 1 | 50 | CartID | 1 |
| * | ☑ | Sent Date | Sent Date | 10 | 50 | | |
| | ☐ | Start Date | Start Date | 8 | 50 | | |
| * | ☑ | Status | Status | 2 | 50 | | |
| | ☐ | Transaction ID | Transaction ID | 7 | 50 | | |
| * | ☑ | User ID | User ID | 4 | 50 | | |

Save

* Mandatory

**Figure 81**

**Charge Capture - Client Screens Configuration:**

Client Screens Configuration

Screen Name: CHARGE CAPTURE

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Item ID | Item ID | 2 | 120 | | |
| * | ☑ | Quantity | Quantity | 3 | 120 | | |

Save

* Mandatory

**Figure 82**

### Charge Status - Client Screens Configuration:

Client Screens Configuration

Screen Name: CHARGE STATUS

Save

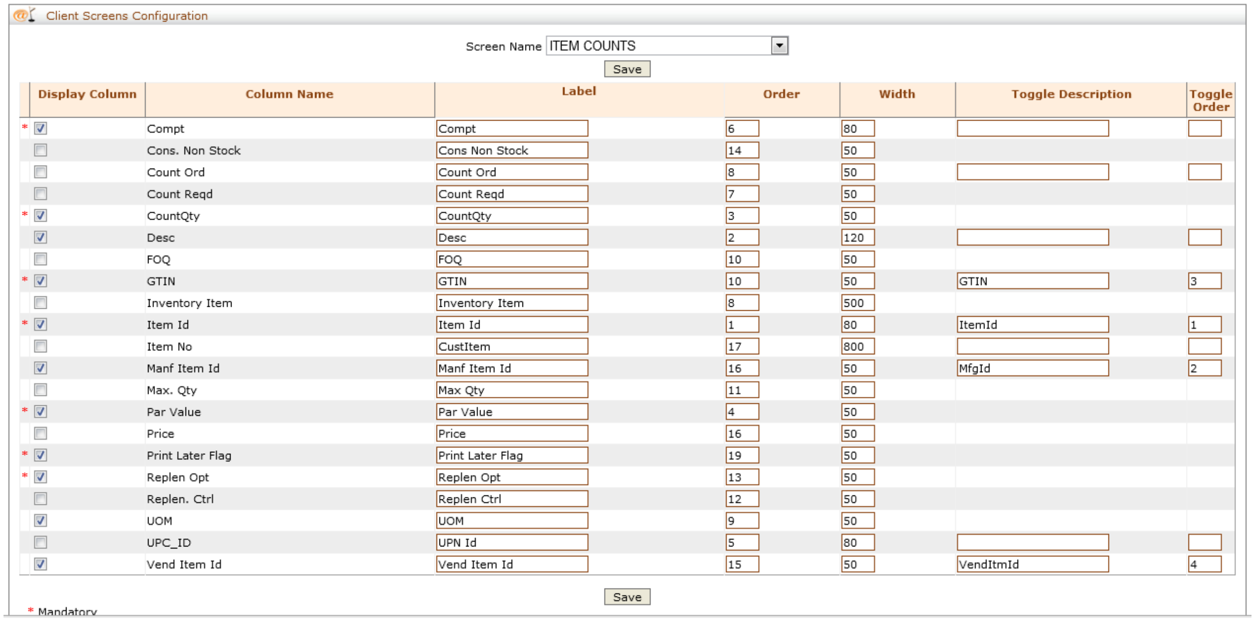
| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| | ☐ | Capture ID | Capture ID | 7 | 50 | | |
| * | ☑ | MRC | MRC | 1 | 50 | MRC | 1 |
| * | ☑ | Name | Name | 2 | 50 | | |
| * | ☑ | Par | Par | 3 | 50 | Par | 2 |
| * | ☑ | Service Date | Service Date | 8 | 50 | | |
| * | ☑ | Status | Status | 4 | 50 | | |
| | ☐ | Transaction Date | Transaction Date | 5 | 50 | | |
| * | ☑ | User ID | User ID | 6 | 50 | | |

Save

* Mandatory

**Figure 83**

### Item Counts - Client Screens Configuration:



Client Screens Configuration

Screen Name ITEM COUNTS

Save

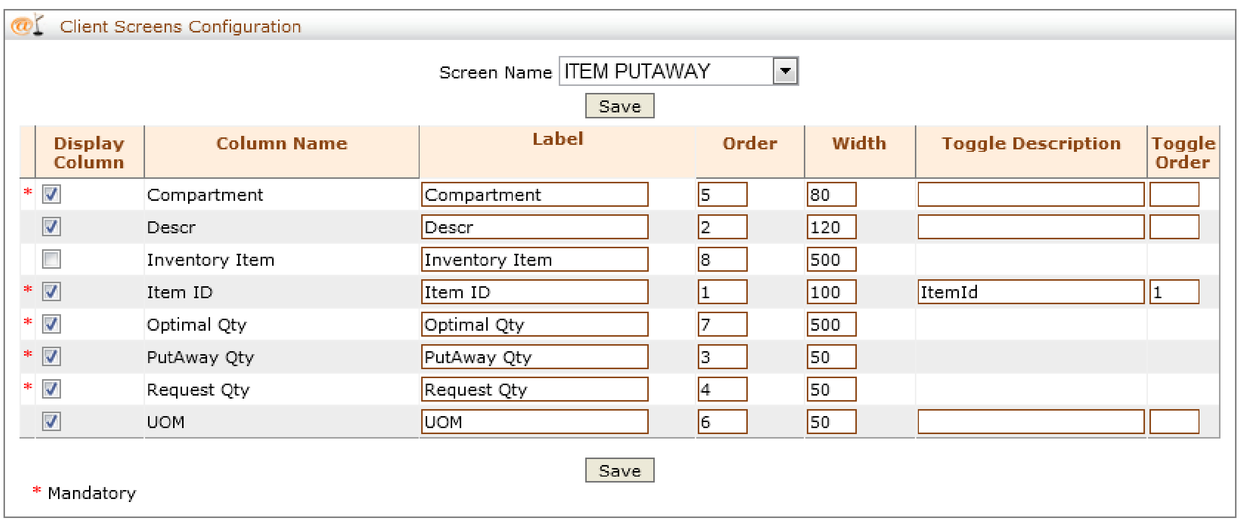
| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Compt | Compt | 6 | 80 | | |
| | ☐ | Cons. Non Stock | Cons Non Stock | 14 | 50 | | |
| | ☐ | Count Ord | Count Ord | 8 | 50 | | |
| | ☐ | Count Reqd | Count Reqd | 7 | 50 | | |
| * | ☑ | CountQty | CountQty | 3 | 50 | | |
| | ☑ | Desc | Desc | 2 | 120 | | |
| | ☐ | FOQ | FOQ | 10 | 50 | | |
| * | ☑ | GTIN | GTIN | 10 | 50 | GTIN | 3 |
| | ☐ | Inventory Item | Inventory Item | 8 | 500 | | |
| * | ☑ | Item Id | Item Id | 1 | 80 | ItemId | 1 |
| | ☐ | Item No | CustItem | 17 | 800 | | |
| | ☑ | Manf Item Id | Manf Item Id | 16 | 50 | MfgId | 2 |
| | ☐ | Max. Qty | Max Qty | 11 | 50 | | |
| * | ☑ | Par Value | Par Value | 4 | 50 | | |
| | ☐ | Price | Price | 16 | 50 | | |
| * | ☑ | Print Later Flag | Print Later Flag | 19 | 50 | | |
| * | ☑ | Replen Opt | Replen Opt | 13 | 50 | | |
| | ☐ | Replen. Ctrl | Replen Ctrl | 12 | 50 | | |
| | ☑ | UOM | UOM | 9 | 50 | | |
| | ☐ | UPC_ID | UPN Id | 5 | 80 | | |
| | ☑ | Vend Item Id | Vend Item Id | 15 | 50 | VendItmId | 4 |

Save

* Mandatory

**Figure 84**

## Item Putaway - Client Screens Configuration:



Client Screens Configuration

Screen Name ITEM PUTAWAY

Save

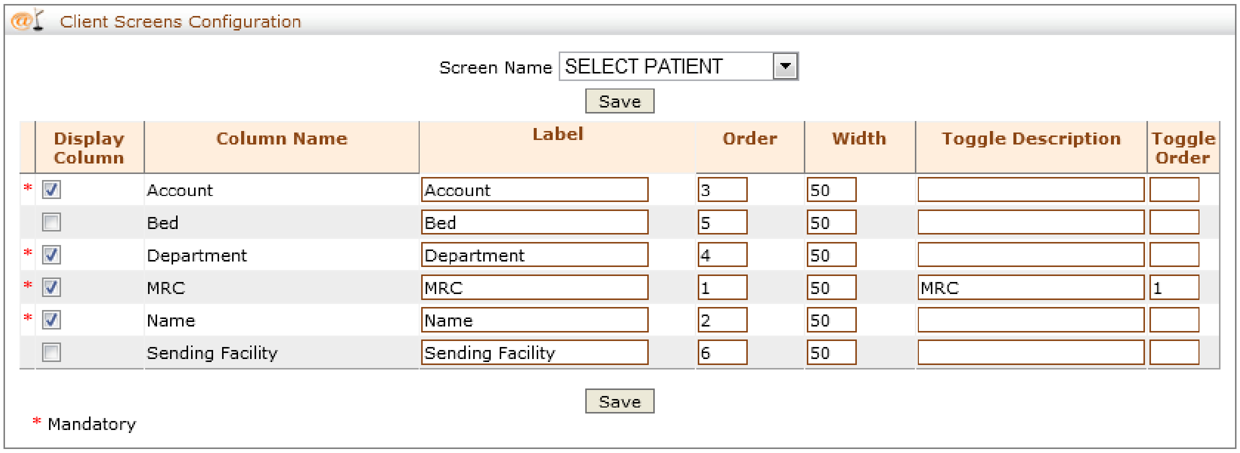
| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Compartment | Compartment | 5 | 80 | | |
| | ☑ | Descr | Descr | 2 | 120 | | |
| | ☐ | Inventory Item | Inventory Item | 8 | 500 | | |
| * | ☑ | Item ID | Item ID | 1 | 100 | ItemId | 1 |
| * | ☑ | Optimal Qty | Optimal Qty | 7 | 500 | | |
| * | ☑ | PutAway Qty | PutAway Qty | 3 | 50 | | |
| * | ☑ | Request Qty | Request Qty | 4 | 50 | | |
| | ☑ | UOM | UOM | 6 | 50 | | |

Save

* Mandatory

**Figure 85**

## Select Patient - Client Screens Configuration:



Client Screens Configuration

Screen Name SELECT PATIENT

Save

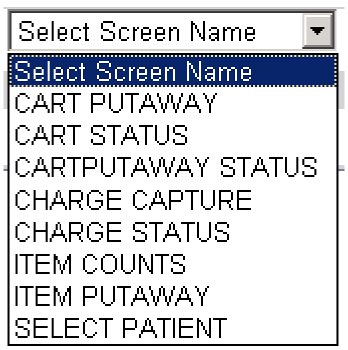
| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Account | Account | 3 | 50 | | |
| | ☐ | Bed | Bed | 5 | 50 | | |
| * | ☑ | Department | Department | 4 | 50 | | |
| * | ☑ | MRC | MRC | 1 | 50 | MRC | 1 |
| * | ☑ | Name | Name | 2 | 50 | | |
| | ☐ | Sending Facility | Sending Facility | 6 | 50 | | |

Save

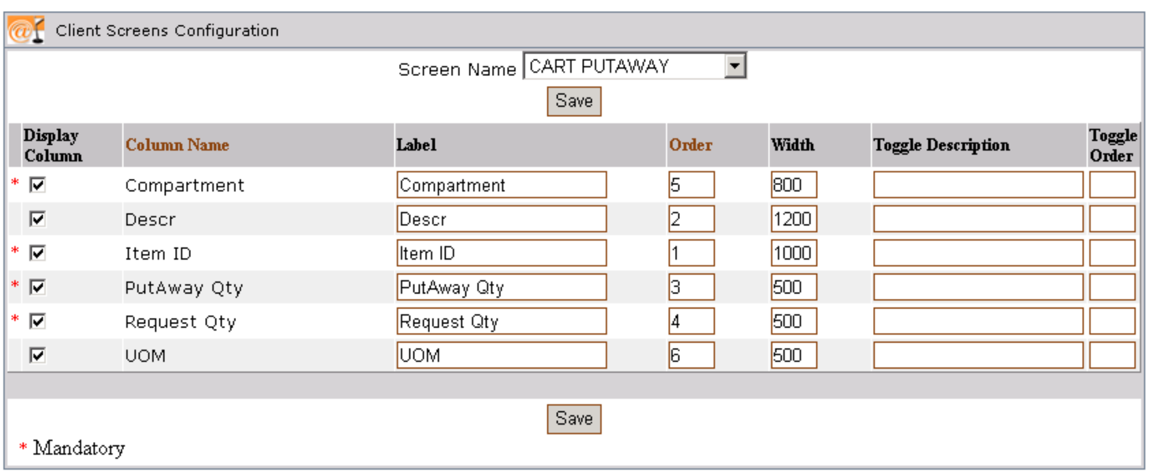
* Mandatory

Figure 86

***Par Management* - Client Screens Configuration:**




**Cart Putaway – Client Screens Configuration:**



Client Screens Configuration

Screen Name CART PUTAWAY

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Compartment | Compartment | 5 | 800 | | |
| | ☑ | Descr | Descr | 2 | 1200 | | |
| * | ☑ | Item ID | Item ID | 1 | 1000 | | |
| * | ☑ | PutAway Qty | PutAway Qty | 3 | 500 | | |
| * | ☑ | Request Qty | Request Qty | 4 | 500 | | |
| | ☑ | UOM | UOM | 6 | 500 | | |

Save

* Mandatory

Figure 87

**Cart Status – Client Screens Configuration:**

Screen Name: CART STATUS

Save

| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | Company | Company | 3 | 50 | Company | 2 |
| * ☑ | Description | Description | 6 | 50 | | |
| * ☑ | Download User Id | Download User Id | 12 | 50 | | |
| ☐ | End Date | End Date | 10 | 50 | | |
| * ☑ | Order | Order | 7 | 50 | | |
| * ☑ | Par Location | Par Location | 1 | 50 | CartID | 1 |
| * ☑ | Qty Option | Qty Option | 5 | 50 | | |
| * ☑ | Sent Date | Sent Date | 11 | 50 | | |
| ☐ | Start Date | Start Date | 9 | 50 | | |
| * ☑ | Status | Status | 2 | 50 | | |
| ☐ | Transaction ID | Transaction ID | 8 | 50 | | |
| * ☑ | User ID | User ID | 4 | 50 | | |

Save

* Mandatory

**Figure 88**

### Cart Putaway Status – Client Screens Configuration:

Client Screens Configuration

Screen Name: CARTPUTAWAY STATU

Save

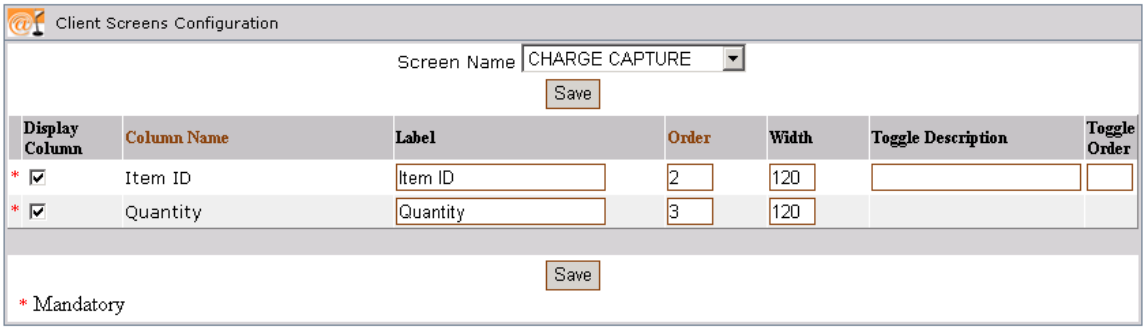
| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | Company | Company | 3 | 50 | | |
| * ☑ | Description | Description | 5 | 50 | | |
| ☐ | End Date | End Date | 9 | 50 | | |
| * ☑ | Order | Order | 6 | 50 | | |
| * ☑ | Par Location | Par Location | 1 | 50 | CartID | 1 |
| * ☑ | Sent Date | Sent Date | 10 | 50 | | |
| ☐ | Start Date | Start Date | 8 | 50 | | |
| * ☑ | Status | Status | 2 | 50 | | |
| ☐ | Transaction ID | Transaction ID | 7 | 50 | | |
| * ☑ | User ID | User ID | 4 | 50 | | |

Save

* Mandatory

**Figure 89**

### Charge Capture – Client Screens Configuration:



Client Screens Configuration

Screen Name CHARGE CAPTURE

Save

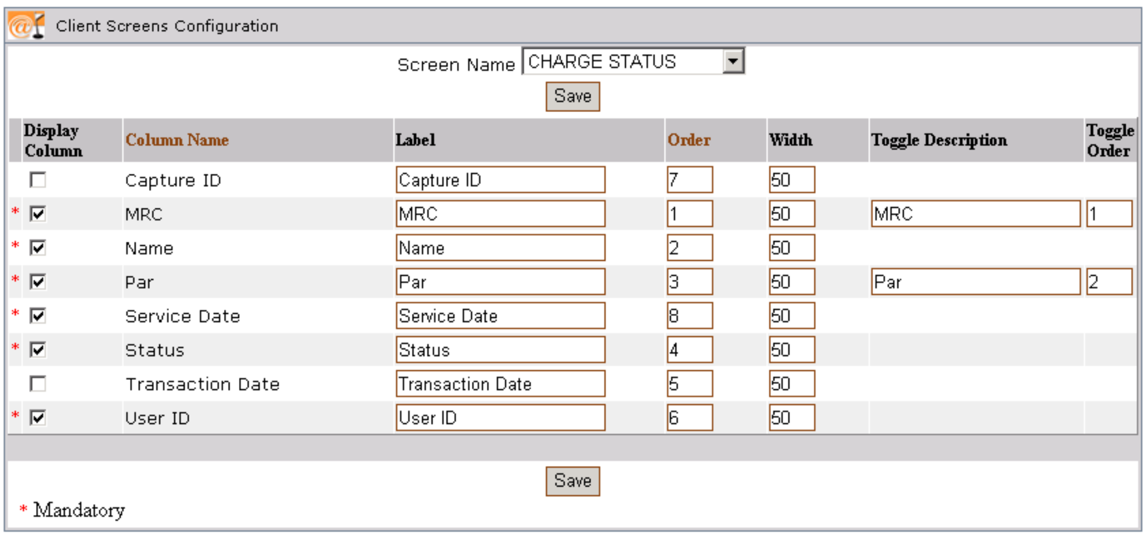
| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Item ID | Item ID | 2 | 120 | | |
| * | ☑ | Quantity | Quantity | 3 | 120 | | |

Save

* Mandatory

Figure 90

### Charge Status – Client Screens Configuration:



Client Screens Configuration

Screen Name CHARGE STATUS

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| | ☐ | Capture ID | Capture ID | 7 | 50 | | |
| * | ☑ | MRC | MRC | 1 | 50 | MRC | 1 |
| * | ☑ | Name | Name | 2 | 50 | | |
| * | ☑ | Par | Par | 3 | 50 | Par | 2 |
| * | ☑ | Service Date | Service Date | 8 | 50 | | |
| * | ☑ | Status | Status | 4 | 50 | | |
| | ☐ | Transaction Date | Transaction Date | 5 | 50 | | |
| * | ☑ | User ID | User ID | 6 | 50 | | |

Save

* Mandatory

Figure 91

### Item Counts – Client Screen Configuration:

Client Screens Configuration

Screen Name ITEM COUNTS

Save

| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | Compt | Compt | 6 | 800 | | |
| ☐ | Count Ord | Count Ord | 8 | 500 | | |
| * ☑ | Count Qty | Count Qty | 3 | 500 | | |
| ☐ | Count Reqd | Count Reqd | 7 | 500 | | |
| ☑ | Descr | Descr | 2 | 1200 | | |
| ☐ | FOQ | FOQ | 10 | 500 | | |
| * ☑ | GTIN | GTIN | 10 | 50 | | |
| ☐ | Inventory Item | Inventory Item | 8 | 500 | | |
| * ☑ | Item Id | Item Id | 1 | 800 | ItemId | 1 |
| ☐ | Item No | Cust.Item | 17 | 800 | | |
| ☑ | Manf Item Id | Manf Item Id | 16 | 500 | | |
| ☐ | Max. Qty | Max. Qty | 11 | 500 | | |
| * ☑ | Opt. Qty | Opt. Qty | 4 | 500 | | |
| ☐ | Price | Price | 16 | 500 | | |
| * ☑ | Print Later Flag | Print Later Flag | 19 | 50 | | |
| ☐ | Replen Opt | Replen Opt | 13 | 500 | | |
| ☐ | Replen. Ctrl | Replen. Ctrl | 12 | 500 | | |
| ☑ | UOM | UOM | 9 | 500 | | |
| ☐ | UPC_ID | UPN Id | 5 | 800 | | |
| ☐ | Vend Item Id | Vend Item Id | 15 | 500 | | |

Save

* Mandatory

**Figure 92**

## Item Putaway – Client Screen Configuration:

Client Screens Configuration

Screen Name ITEM PUTAWAY

Save

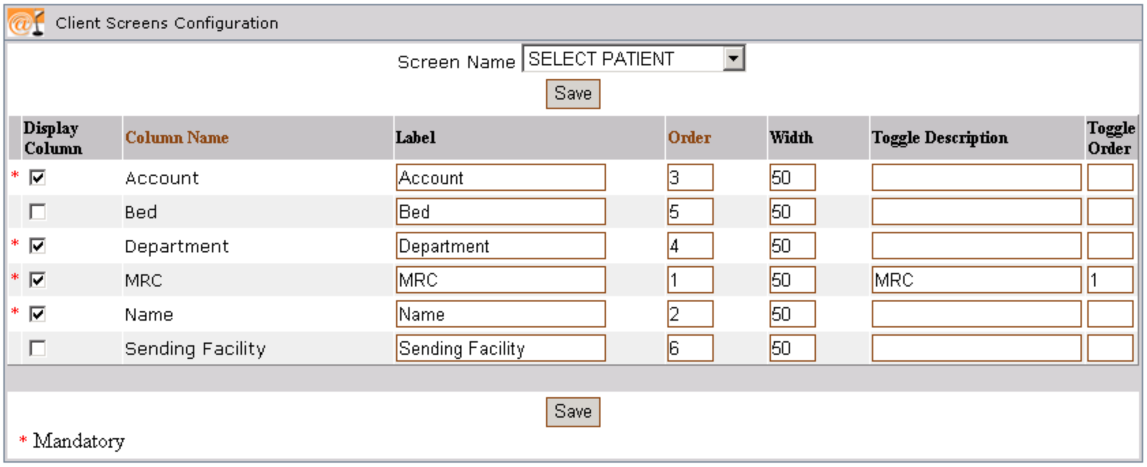
| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | Compartment | Compartment | 5 | 80 | | |
| ☑ | Descr | Descr | 2 | 120 | | |
| * ☑ | Item ID | Item ID | 1 | 100 | ItemId | 1 |
| * ☑ | PutAway Qty | PutAway Qty | 3 | 50 | | |
| * ☑ | Request Qty | Request Qty | 4 | 50 | | |
| ☑ | UOM | UOM | 6 | 50 | | |

Save

* Mandatory

**Figure 93**

### Select Patient – Client Screens Configuration:



Client Screens Configuration

Screen Name: SELECT PATIENT

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Account | Account | 3 | 50 | | |
| | ☐ | Bed | Bed | 5 | 50 | | |
| * | ☑ | Department | Department | 4 | 50 | | |
| * | ☑ | MRC | MRC | 1 | 50 | MRC | 1 |
| * | ☑ | Name | Name | 2 | 50 | | |
| | ☐ | Sending Facility | Sending Facility | 6 | 50 | | |

Save

* Mandatory

Figure 94

### *Cycle Count* - Client Screens Configuration:

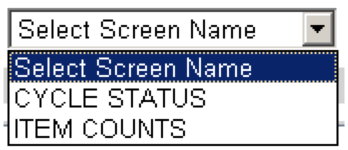
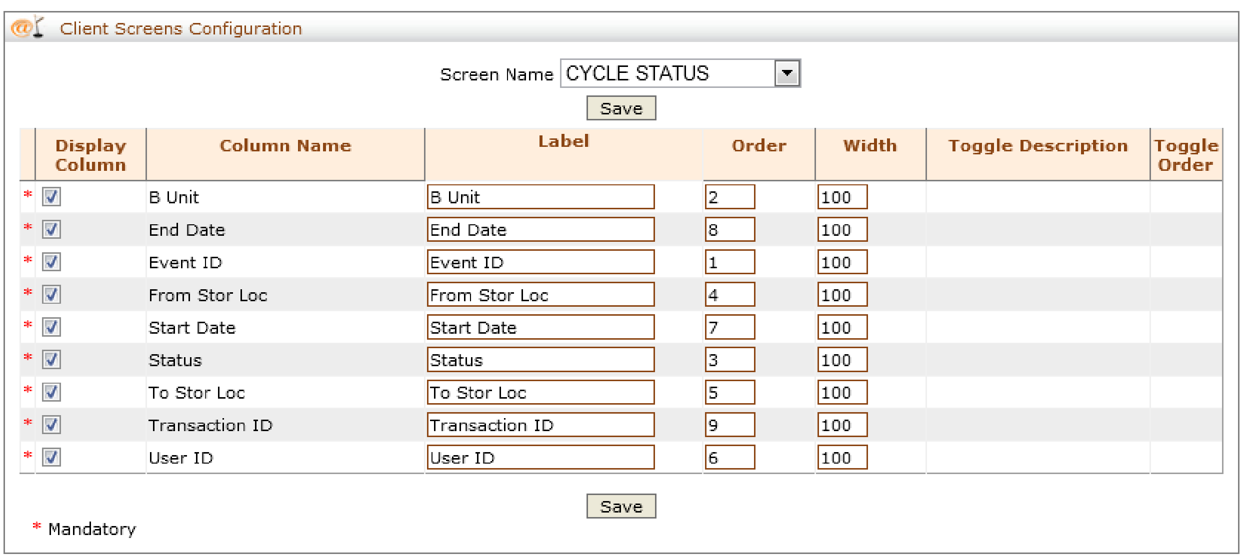



Figure 95

### Cycle Status – Main *screen*



Client Screens Configuration

Screen Name: CYCLE STATUS

Save

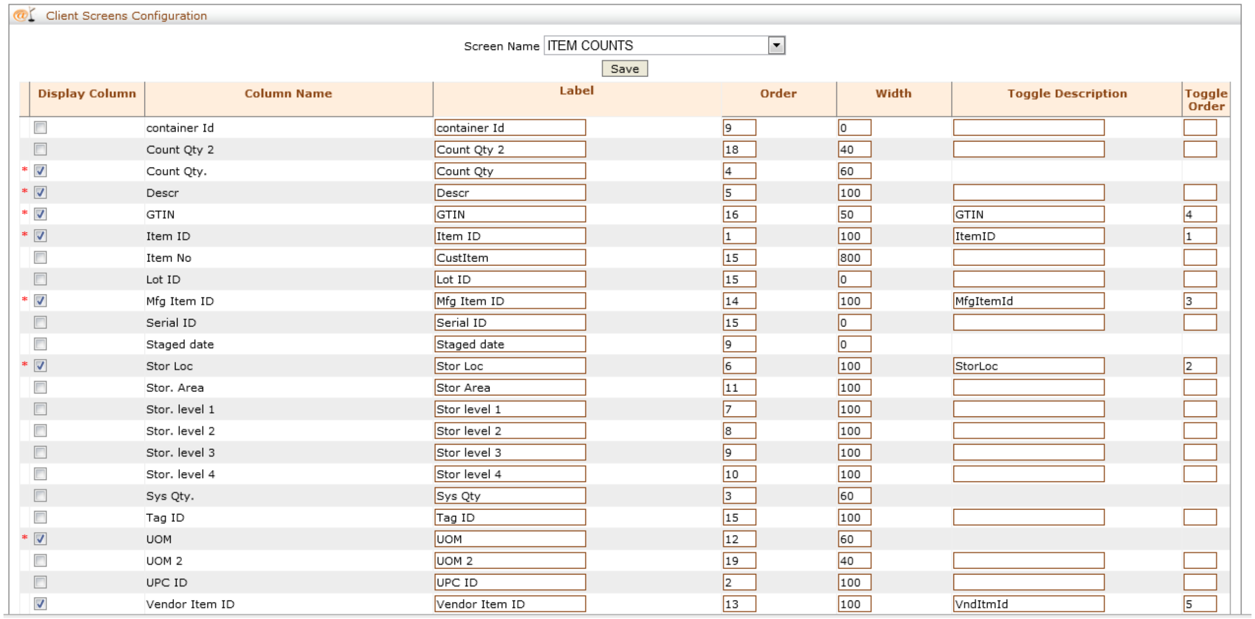
| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | B Unit | B Unit | 2 | 100 | | |
| * | ☑ | End Date | End Date | 8 | 100 | | |
| * | ☑ | Event ID | Event ID | 1 | 100 | | |
| * | ☑ | From Stor Loc | From Stor Loc | 4 | 100 | | |
| * | ☑ | Start Date | Start Date | 7 | 100 | | |
| * | ☑ | Status | Status | 3 | 100 | | |
| * | ☑ | To Stor Loc | To Stor Loc | 5 | 100 | | |
| * | ☑ | Transaction ID | Transaction ID | 9 | 100 | | |
| * | ☑ | User ID | User ID | 6 | 100 | | |

Save

* Mandatory

Figure 96

### Item Counts - Client Screens Configuration:



Client Screens Configuration

Screen Name ITEM COUNTS

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| | ☐ | container Id | container Id | 9 | 0 | | |
| | ☐ | Count Qty 2 | Count Qty 2 | 18 | 40 | | |
| * | ☑ | Count Qty. | Count Qty | 4 | 60 | | |
| * | ☑ | Descr | Descr | 5 | 100 | | |
| * | ☑ | GTIN | GTIN | 16 | 50 | GTIN | 4 |
| * | ☑ | Item ID | Item ID | 1 | 100 | ItemID | 1 |
| | ☐ | Item No | CustItem | 15 | 800 | | |
| | ☐ | Lot ID | Lot ID | 15 | 0 | | |
| * | ☑ | Mfg Item ID | Mfg Item ID | 14 | 100 | MfgItemId | 3 |
| | ☐ | Serial ID | Serial ID | 15 | 0 | | |
| | ☐ | Staged date | Staged date | 9 | 0 | | |
| * | ☑ | Stor Loc | Stor Loc | 6 | 100 | StorLoc | 2 |
| | ☐ | Stor. Area | Stor Area | 11 | 100 | | |
| | ☐ | Stor. level 1 | Stor level 1 | 7 | 100 | | |
| | ☐ | Stor. level 2 | Stor level 2 | 8 | 100 | | |
| | ☐ | Stor. level 3 | Stor level 3 | 9 | 100 | | |
| | ☐ | Stor. level 4 | Stor level 4 | 10 | 100 | | |
| | ☐ | Sys Qty. | Sys Qty | 3 | 60 | | |
| | ☐ | Tag ID | Tag ID | 15 | 100 | | |
| * | ☑ | UOM | UOM | 12 | 60 | | |
| | ☐ | UOM 2 | UOM 2 | 19 | 40 | | |
| | ☐ | UPC ID | UPC ID | 2 | 100 | | |
| | ☑ | Vendor Item ID | Vendor Item ID | 13 | 100 | VndItmId | 5 |

**Figure 97**

## *Receiving* - Client Screens Configuration:

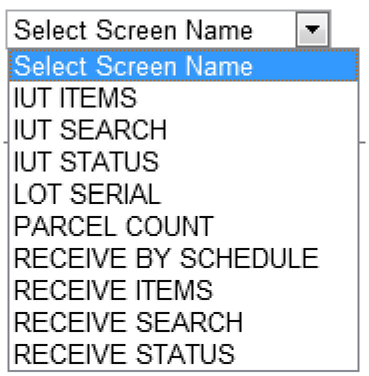



**Figure 98**

## IUT ITEMS – Inter Unit Transfer - Client Screens Configuration:

Client Screens Configuration

Screen Name IUT ITEMS

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Bill Of Lading | Bill Of Lading | 14 | 30 | | |
| * | ☑ | Carrier ID | Carrier ID | 13 | 20 | | |
| | ☐ | Custom ID | Custom ID | 12 | 30 | | |
| * | ☑ | Desc. | Desc | 3 | 50 | | |
| | ☐ | GTIN | GTIN | 16 | 50 | | |
| * | ☑ | ItemID | ItemID | 1 | 30 | ItemID | 1 |
| * | ☑ | Line No. | Line No | 2 | 25 | | |
| | ☐ | Lot Flag | Lot Flag | 8 | 15 | | |
| | ☐ | Mfg. ID | Mfg ID | 10 | 30 | MfgID | 3 |
| | ☐ | No Of Pkgs | No Of Pkgs | 15 | 10 | | |
| * | ☑ | Qty | Qty | 4 | 20 | | |
| | ☐ | Serial Flag | Serial Flag | 7 | 15 | | |
| * | ☑ | Stor Loc. | Stor Loc | 5 | 30 | StrLoc | 5 |
| | ☐ | Transferred Qty | Transferred Qty | 17 | 50 | | |
| * | ☑ | UOM | UOM | 6 | 20 | | |
| | ☐ | UPC ID | UPC ID | 9 | 30 | UPC ID | 2 |
| | ☐ | Vendor ID | Vendor ID | 11 | 30 | Vend ID | 4 |

Save

* Mandatory

**Figure 99**

## IUT Search - Client Screens Configuration:

Client Screens Configuration

Screen Name IUT SEARCH

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Dest. BUnit | Dest BUnit | 2 | 65 | | |
| * | ☑ | Inter Unit ID | Inter Unit ID | 1 | 65 | | |
| * | ☑ | Shipped Date | Shipped Date | 4 | 70 | | |
| * | ☑ | Source BUnit | Source BUnit | 3 | 65 | | |

Save

* Mandatory

**Figure 100**

## IUT Status - Client Screens Configuration:

Client Screens Configuration

Screen Name IUT STATUS

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | UserID | UserID | 4 | 50 | | |
| * | ☑ | Dest. BUnit | Dest BUnit | 2 | 50 | | |
| * | ☑ | Inter Unit ID | Inter Unit ID | 1 | 50 | | |
| * | ☑ | Origin Bunit | Origin Bunit | 3 | 50 | | |
| * | ☑ | Shipped Date | Shipped Date | 6 | 60 | | |
| * | ☑ | Status | Status | 5 | 50 | | |

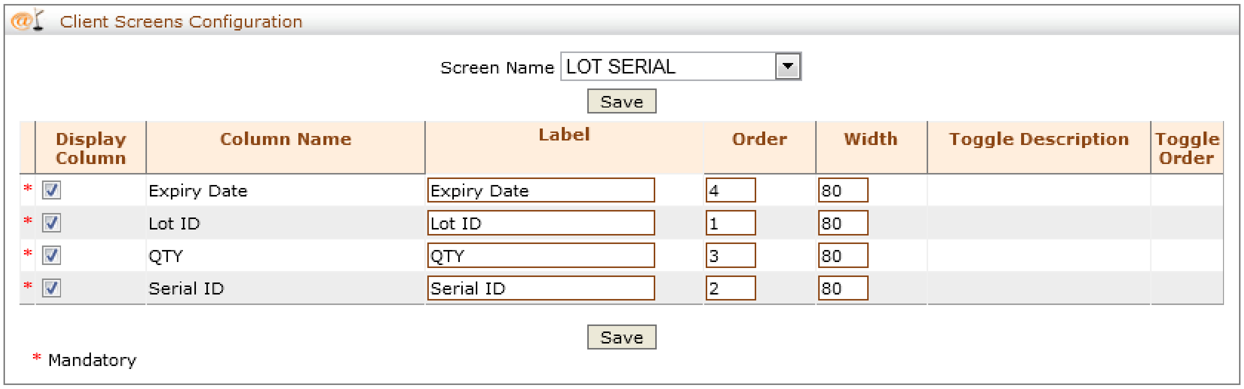
Save

* Mandatory

**Figure 101**


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

## LOT SERIAL - Client Screens Configuration:


Client Screens Configuration

Screen Name: LOT SERIAL

Save

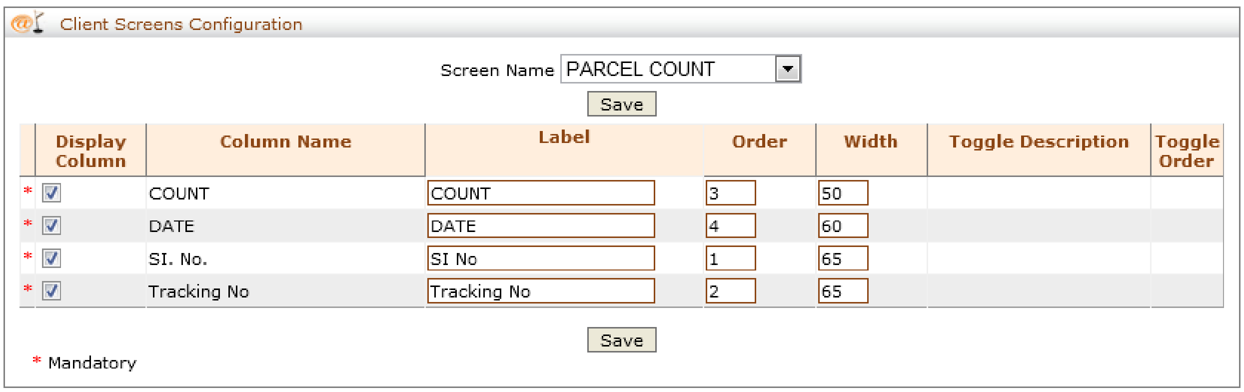
| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Expiry Date | Expiry Date | 4 | 80 | | |
| * | ☑ | Lot ID | Lot ID | 1 | 80 | | |
| * | ☑ | QTY | QTY | 3 | 80 | | |
| * | ☑ | Serial ID | Serial ID | 2 | 80 | | |

Save

* Mandatory

Figure 102

## Parcel Count - Client Screens Configuration:


Client Screens Configuration

Screen Name: PARCEL COUNT

Save

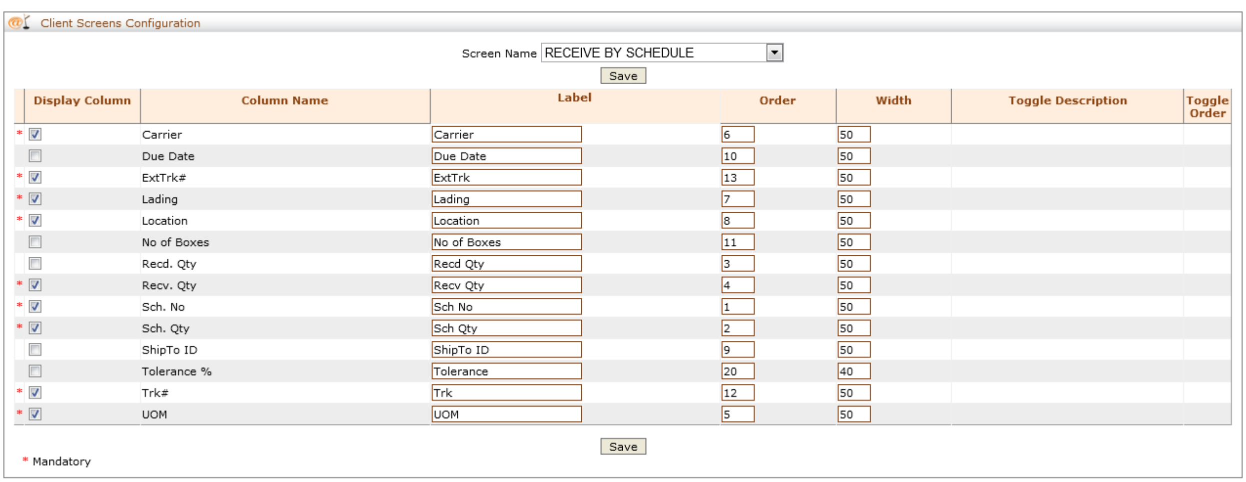
| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | COUNT | COUNT | 3 | 50 | | |
| * | ☑ | DATE | DATE | 4 | 60 | | |
| * | ☑ | SI. No. | SI No | 1 | 65 | | |
| * | ☑ | Tracking No | Tracking No | 2 | 65 | | |

Save

* Mandatory

Figure 103

## Receive by Schedule - Client Screens Configuration:


Client Screens Configuration

Screen Name: RECEIVE BY SCHEDULE

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Carrier | Carrier | 6 | 50 | | |
| | ☐ | Due Date | Due Date | 10 | 50 | | |
| * | ☑ | ExtTrk# | ExtTrk | 13 | 50 | | |
| * | ☑ | Lading | Lading | 7 | 50 | | |
| * | ☑ | Location | Location | 8 | 50 | | |
| | ☐ | No of Boxes | No of Boxes | 11 | 50 | | |
| | ☐ | Recd. Qty | Recd Qty | 3 | 50 | | |
| * | ☑ | Recv. Qty | Recv Qty | 4 | 50 | | |
| * | ☑ | Sch. No | Sch No | 1 | 50 | | |
| * | ☑ | Sch. Qty | Sch Qty | 2 | 50 | | |
| | ☐ | ShipTo ID | ShipTo ID | 9 | 50 | | |
| | ☐ | Tolerance % | Tolerance | 20 | 40 | | |
| * | ☑ | Trk# | Trk | 12 | 50 | | |
| * | ☑ | UOM | UOM | 5 | 50 | | |

Save

* Mandatory

Figure 104

## Receive Items - Client Screens Configuration:

Client Screens Configuration

Screen Name: RECEIVE ITEMS

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| | ☐ | # of boxes | Of Boxes | 17 | 80 | | |
| * | ☑ | Carrier ID | Carrier ID | 7 | 80 | | |
| * | ☑ | Descr | Descr | 2 | 80 | | |
| | ☐ | Due Date | Due Date | 16 | 80 | | |
| | ☑ | GTIN | GTIN | 21 | 50 | GTIN | 3 |
| * | ☑ | Insp Flag | Insp Flag | 18 | 80 | | |
| * | ☑ | Inv. Item | Inv Item | 10 | 80 | | |
| * | ☑ | Item Id | Item Id | 1 | 80 | ItemId | 1 |
| | ☐ | Item No | CustItem | 19 | 80 | | |
| * | ☑ | Lading | Lading | 8 | 80 | | |
| * | ☑ | Line No | Line No | 13 | 80 | | |
| * | ☑ | Location | Location | 11 | 80 | | |
| | ☐ | Lot Controlled | Lot Controlled | 22 | 80 | | |
| | ☑ | Mfg Item Id | Manf Item Id | 15 | 80 | MfgItmId | 2 |
| * | ☑ | Po Qty | Po Qty | 4 | 80 | | |
| | ☐ | Recd Qty | Recd Qty | 5 | 80 | | |
| * | ☑ | Recv Qty | Recv Qty | 3 | 80 | | |
| | ☐ | Serial Controlled | Serial Controlled | 23 | 80 | | |
| | ☐ | Ship To ID | ShipTo ID | 12 | 80 | | |
| | ☐ | Tolerance % | Tolerance | 20 | 40 | | |
| * | ☑ | UOM | UOM | 6 | 80 | | |
| | ☐ | UPC Id | UPC ID | 14 | 80 | | |
| | ☑ | Vndr Item ID | Vndr Item ID | 9 | 80 | VndrItmId | 4 |

**Figure 105**

## Receive Search - Client Screens Configuration:

Client Screens Configuration

Screen Name: RECEIVE SEARCH

Save

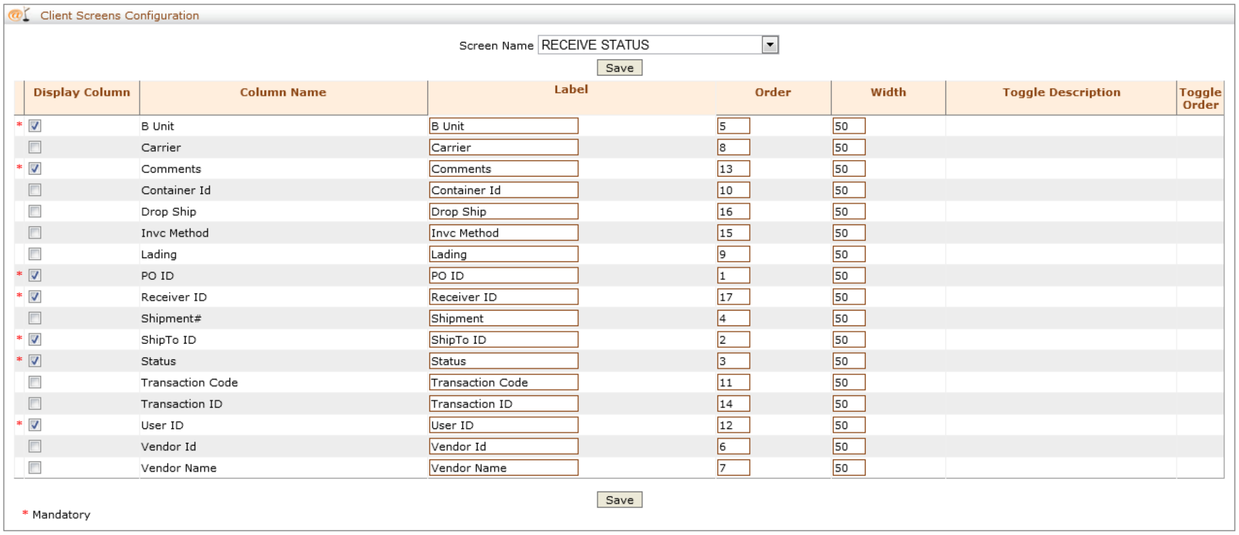
| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | B Unit | B Unit | 1 | 50 | | |
| * | ☑ | PO Date | PO Date | 3 | 50 | | |
| * | ☑ | PO ID | PO ID | 2 | 50 | | |
| * | ☑ | Receiver ID | Receiver ID | 6 | 50 | | |
| * | ☑ | Ship To ID | Ship To ID | 4 | 50 | | |
| * | ☑ | Vendor ID | Vendor ID | 5 | 50 | | |

Save

* Mandatory

**Figure 106**

## Receive Status - Client Screens Configuration:




| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | B Unit | B Unit | 5 | 50 | | |
| ☐ | Carrier | Carrier | 8 | 50 | | |
| * ☑ | Comments | Comments | 13 | 50 | | |
| ☐ | Container Id | Container Id | 10 | 50 | | |
| ☐ | Drop Ship | Drop Ship | 16 | 50 | | |
| ☐ | Invc Method | Invc Method | 15 | 50 | | |
| ☐ | Lading | Lading | 9 | 50 | | |
| * ☑ | PO ID | PO ID | 1 | 50 | | |
| * ☑ | Receiver ID | Receiver ID | 17 | 50 | | |
| ☐ | Shipment# | Shipment | 4 | 50 | | |
| * ☑ | ShipTo ID | ShipTo ID | 2 | 50 | | |
| * ☑ | Status | Status | 3 | 50 | | |
| ☐ | Transaction Code | Transaction Code | 11 | 50 | | |
| ☐ | Transaction ID | Transaction ID | 14 | 50 | | |
| * ☑ | User ID | User ID | 12 | 50 | | |
| ☐ | Vendor Id | Vendor Id | 6 | 50 | | |
| ☐ | Vendor Name | Vendor Name | 7 | 50 | | |



**Figure 107**

### *Par Management* – Receiving Client Screen Configurations:

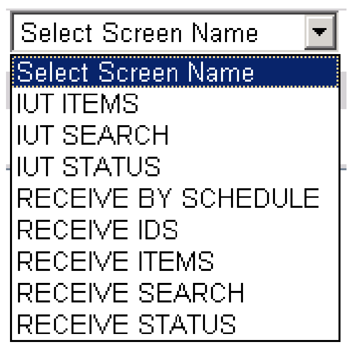
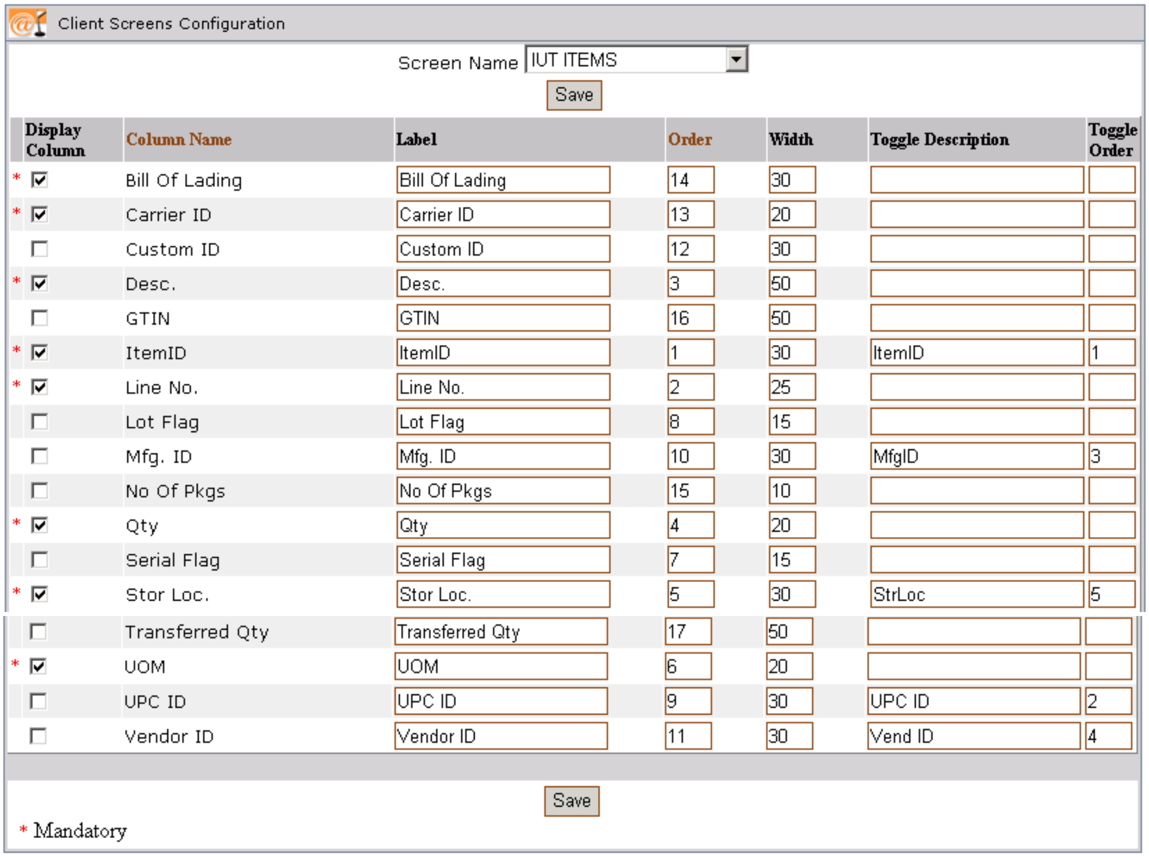



**Figure 108**

### IUT ITEMS – Inter Unit Transfer - Client Screens Configuration:



Client Screens Configuration

Screen Name: IUT ITEMS

Save

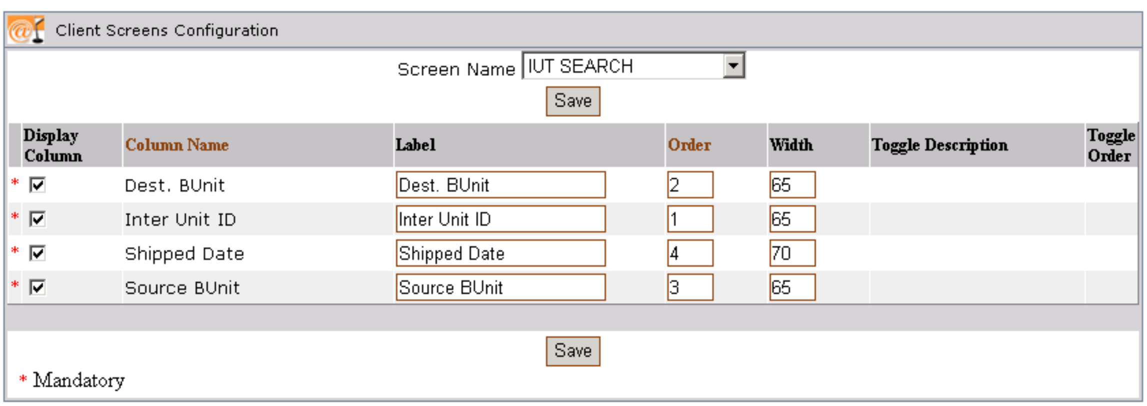
| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | Bill Of Lading | Bill Of Lading | 14 | 30 | | |
| * ☑ | Carrier ID | Carrier ID | 13 | 20 | | |
| ☐ | Custom ID | Custom ID | 12 | 30 | | |
| * ☑ | Desc. | Desc. | 3 | 50 | | |
| ☐ | GTIN | GTIN | 16 | 50 | | |
| * ☑ | ItemID | ItemID | 1 | 30 | ItemID | 1 |
| * ☑ | Line No. | Line No. | 2 | 25 | | |
| ☐ | Lot Flag | Lot Flag | 8 | 15 | | |
| ☐ | Mfg. ID | Mfg. ID | 10 | 30 | MfgID | 3 |
| ☐ | No Of Pkgs | No Of Pkgs | 15 | 10 | | |
| * ☑ | Qty | Qty | 4 | 20 | | |
| ☐ | Serial Flag | Serial Flag | 7 | 15 | | |
| * ☑ | Stor Loc. | Stor Loc. | 5 | 30 | StrLoc | 5 |
| ☐ | Transferred Qty | Transferred Qty | 17 | 50 | | |
| * ☑ | UOM | UOM | 6 | 20 | | |
| ☐ | UPC ID | UPC ID | 9 | 30 | UPC ID | 2 |
| ☐ | Vendor ID | Vendor ID | 11 | 30 | Vend ID | 4 |

Save

* Mandatory

**Figure 109**

## IUT Search – Client *S*creens Configuration:



Client Screens Configuration

Screen Name: IUT SEARCH

Save

| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | Dest. BUnit | Dest. BUnit | 2 | 65 | | |
| * ☑ | Inter Unit ID | Inter Unit ID | 1 | 65 | | |
| * ☑ | Shipped Date | Shipped Date | 4 | 70 | | |
| * ☑ | Source BUnit | Source BUnit | 3 | 65 | | |

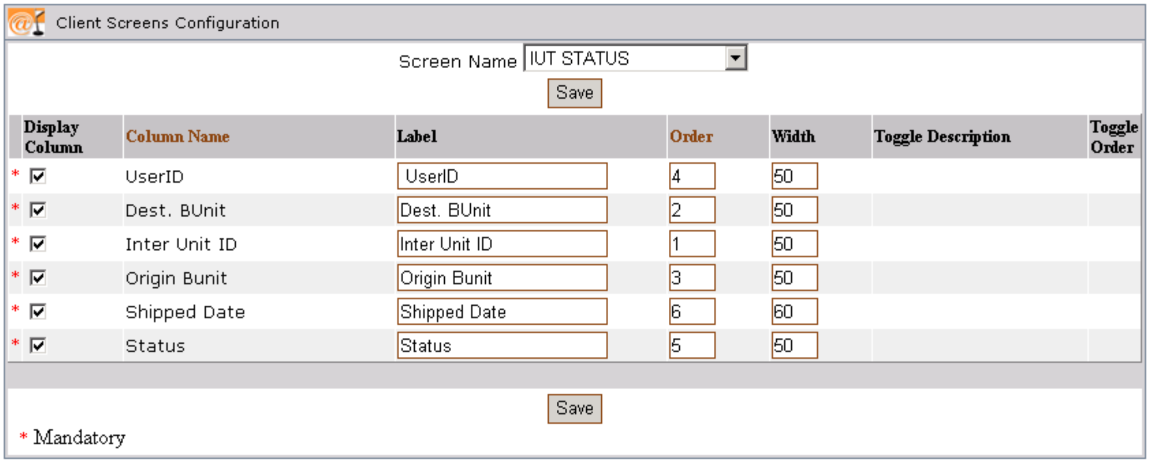
Save

* Mandatory

**Figure 110**

## IUT Status – Client Screens Configuration:


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



Client Screens Configuration

Screen Name: IUT STATUS

Save

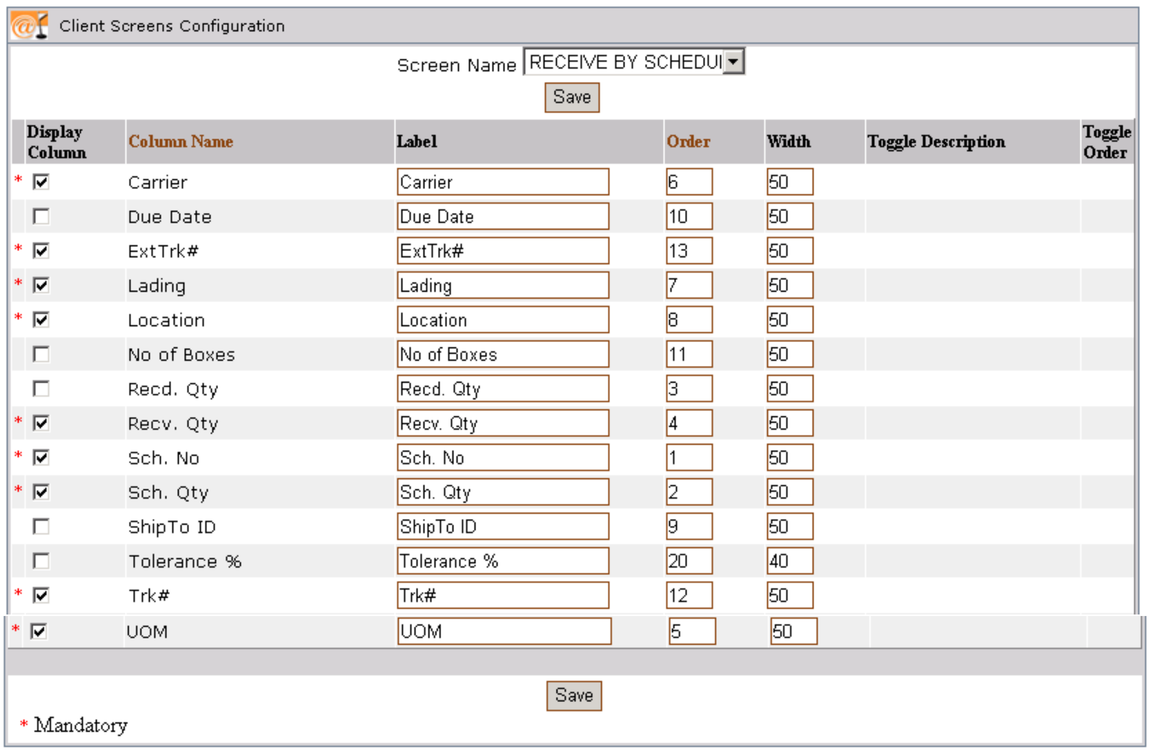
| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | UserID | UserID | 4 | 50 | | |
| * | ☑ | Dest. BUnit | Dest. BUnit | 2 | 50 | | |
| * | ☑ | Inter Unit ID | Inter Unit ID | 1 | 50 | | |
| * | ☑ | Origin Bunit | Origin Bunit | 3 | 50 | | |
| * | ☑ | Shipped Date | Shipped Date | 6 | 60 | | |
| * | ☑ | Status | Status | 5 | 50 | | |

Save

* Mandatory

**Figure 111**

### Receive by Schedule - Client Screens Configuration:



Client Screens Configuration

Screen Name: RECEIVE BY SCHEDUI

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Carrier | Carrier | 6 | 50 | | |
| | ☐ | Due Date | Due Date | 10 | 50 | | |
| * | ☑ | ExtTrk# | ExtTrk# | 13 | 50 | | |
| * | ☑ | Lading | Lading | 7 | 50 | | |
| * | ☑ | Location | Location | 8 | 50 | | |
| | ☐ | No of Boxes | No of Boxes | 11 | 50 | | |
| | ☐ | Recd. Qty | Recd. Qty | 3 | 50 | | |
| * | ☑ | Recv. Qty | Recv. Qty | 4 | 50 | | |
| * | ☑ | Sch. No | Sch. No | 1 | 50 | | |
| * | ☑ | Sch. Qty | Sch. Qty | 2 | 50 | | |
| | ☐ | ShipTo ID | ShipTo ID | 9 | 50 | | |
| | ☐ | Tolerance % | Tolerance % | 20 | 40 | | |
| * | ☑ | Trk# | Trk# | 12 | 50 | | |
| * | ☑ | UOM | UOM | 5 | 50 | | |

Save

* Mandatory

**Figure 112**

### Receive IDS - Client Screens Configuration:

Client Screens Configuration

Screen Name: RECEIVE IDS

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Lot ID | Lot ID | 1 | 80 | | |
| * | ☑ | QTY | QTY | 3 | 80 | | |
| * | ☑ | Serial ID | Serial ID | 2 | 80 | | |

Save

* Mandatory

**Figure 113**

### Receive Items - Client Screens Configuration:

Client Screens Configuration

Screen Name: RECEIVE ITEMS

Save

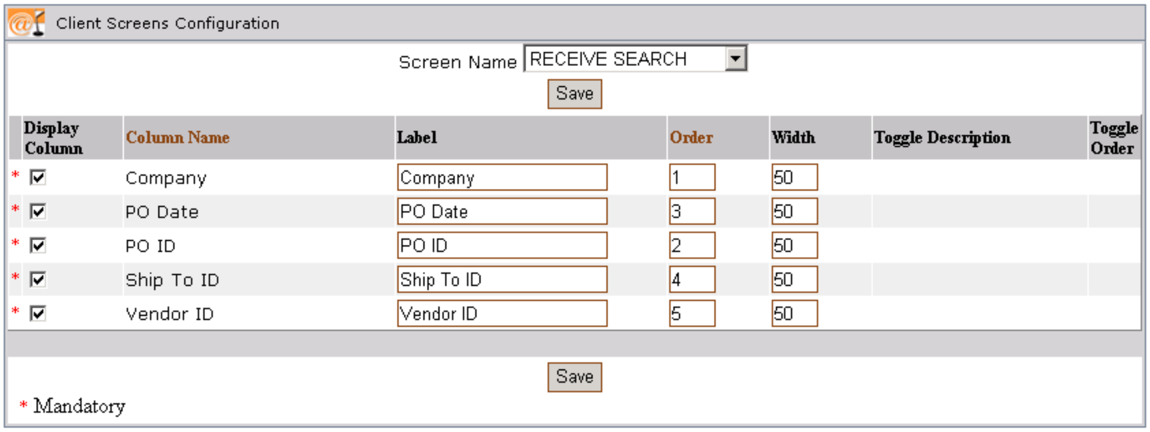
| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| | ☐ | # of boxes | # Of Boxes | 17 | 80 | | |
| * | ☑ | Carrier ID | Carrier ID | 7 | 80 | | |
| * | ☑ | Descr | Descr | 2 | 80 | | |
| | ☐ | Due Date | Due Date | 16 | 80 | | |
| | ☐ | GTIN | GTIN | 21 | 50 | | |
| * | ☑ | Insp Flag | Insp Flag | 18 | 80 | | |
| * | ☑ | Inv. Item | Inv. Item | 10 | 80 | | |
| * | ☑ | Item Id | Item Id | 1 | 80 | ItemId | 1 |
| | ☐ | Item No | Cust.Item | 19 | 80 | | |
| * | ☑ | Lading | Lading | 8 | 80 | | |
| * | ☑ | Line No | Line No | 13 | 80 | | |
| * | ☑ | Location | Location | 11 | 80 | | |
| | ☐ | Lot Controlled | Lot Controlled | 22 | 80 | | |
| | ☐ | Mfg Item Id | Manf Item Id | 15 | 80 | | |
| * | ☑ | Po Qty | Po Qty | 4 | 80 | | |
| | ☐ | Recd Qty | Recd. Qty | 5 | 80 | | |
| * | ☑ | Recv Qty | Recv. Qty | 3 | 80 | | |
| | ☐ | Serial Controlled | Serial Controlled | 23 | 80 | | |
| | ☐ | Ship To ID | ShipTo ID | 12 | 80 | | |
| | ☐ | Tolerance % | Tolerance % | 20 | 40 | | |
| * | ☑ | UOM | UOM | 6 | 80 | | |
| | ☐ | UPC Id | UPC ID | 14 | 80 | | |
| | ☐ | Vndr Item ID | Vndr Item ID | 9 | 80 | | |

Save

* Mandatory

**Figure 114**

### Receive Search - Client Screens Configuration:



Client Screens Configuration

Screen Name RECEIVE SEARCH

Save

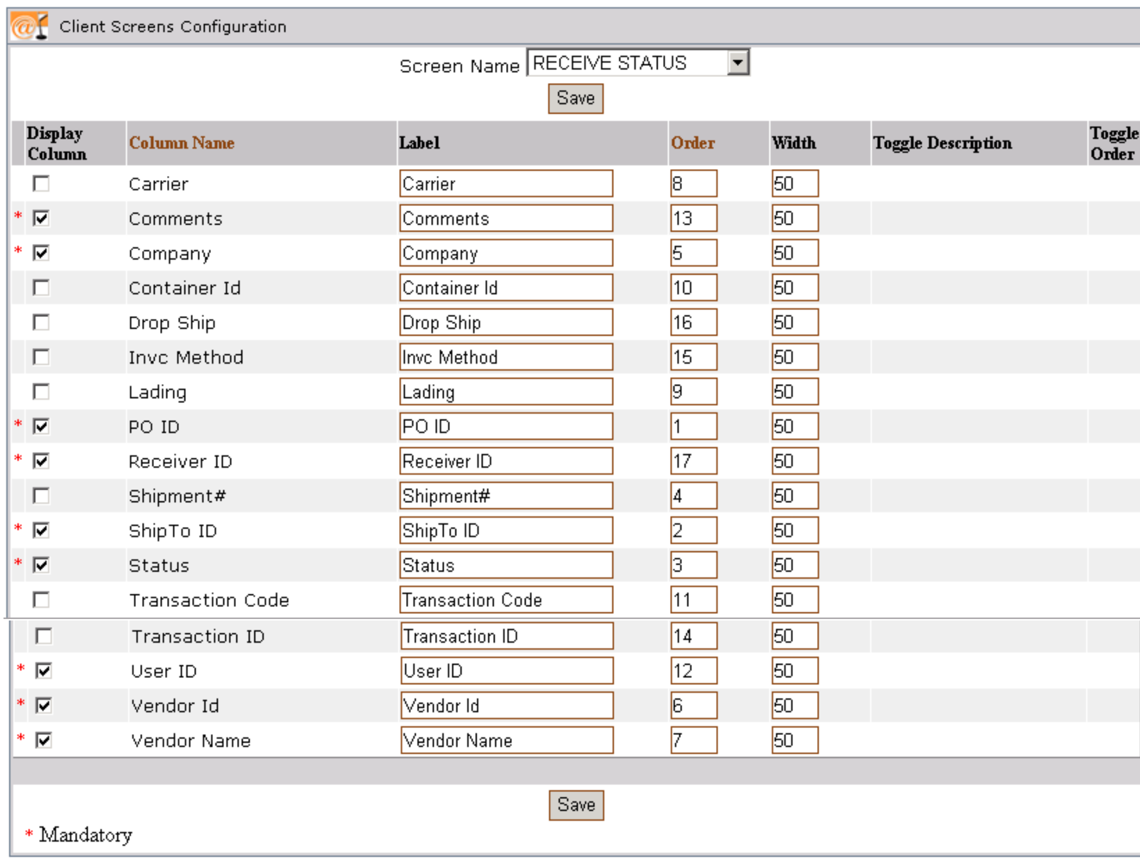
| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | Company | Company | 1 | 50 | | |
| * ☑ | PO Date | PO Date | 3 | 50 | | |
| * ☑ | PO ID | PO ID | 2 | 50 | | |
| * ☑ | Ship To ID | Ship To ID | 4 | 50 | | |
| * ☑ | Vendor ID | Vendor ID | 5 | 50 | | |

Save

* Mandatory

Figure 115

### Receive Status - Client Screens Configuration:



Client Screens Configuration

Screen Name RECEIVE STATUS

Save

| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| ☐ | Carrier | Carrier | 8 | 50 | | |
| * ☑ | Comments | Comments | 13 | 50 | | |
| * ☑ | Company | Company | 5 | 50 | | |
| ☐ | Container Id | Container Id | 10 | 50 | | |
| ☐ | Drop Ship | Drop Ship | 16 | 50 | | |
| ☐ | Invc Method | Invc Method | 15 | 50 | | |
| ☐ | Lading | Lading | 9 | 50 | | |
| * ☑ | PO ID | PO ID | 1 | 50 | | |
| * ☑ | Receiver ID | Receiver ID | 17 | 50 | | |
| ☐ | Shipment# | Shipment# | 4 | 50 | | |
| * ☑ | ShipTo ID | ShipTo ID | 2 | 50 | | |
| * ☑ | Status | Status | 3 | 50 | | |
| ☐ | Transaction Code | Transaction Code | 11 | 50 | | |
| ☐ | Transaction ID | Transaction ID | 14 | 50 | | |
| * ☑ | User ID | User ID | 12 | 50 | | |
| * ☑ | Vendor Id | Vendor Id | 6 | 50 | | |
| * ☑ | Vendor Name | Vendor Name | 7 | 50 | | |

Save

* Mandatory

Figure 116

### Pick - Client Screens Configuration:

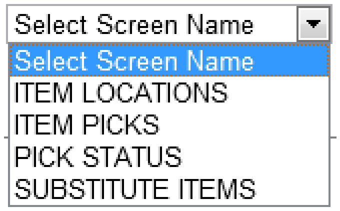
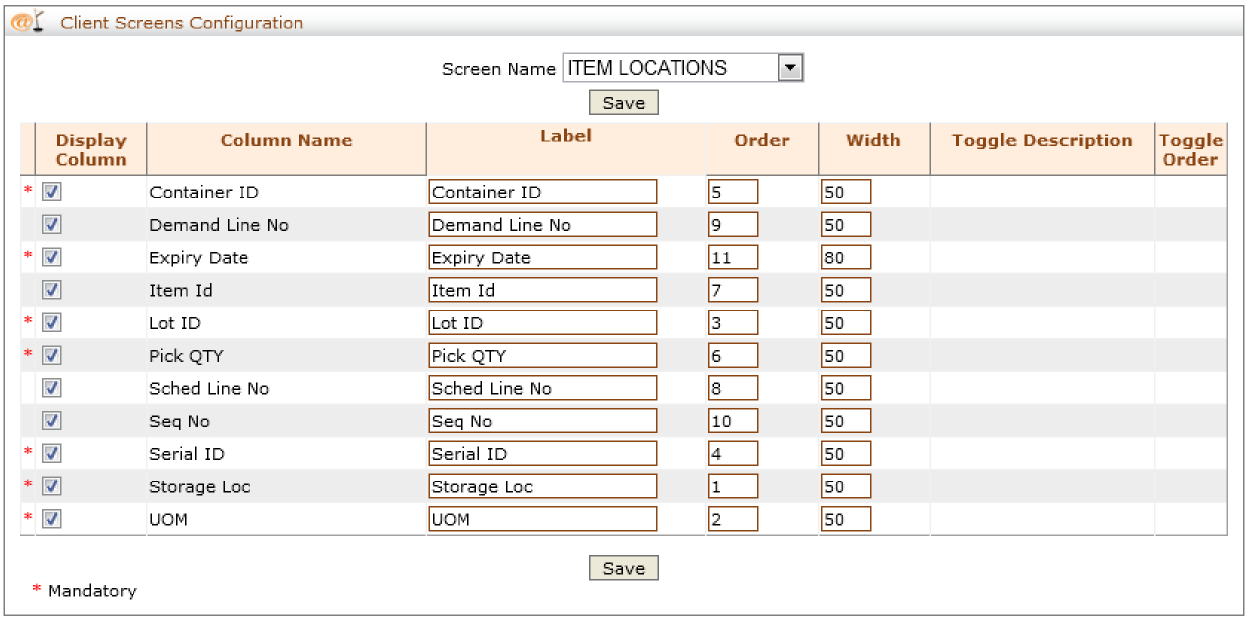



**Figure 117**

**Item Locations - Client Screens Configuration:**


Client Screens Configuration

Screen Name ITEM LOCATIONS

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Container ID | Container ID | 5 | 50 | | |
| | ☑ | Demand Line No | Demand Line No | 9 | 50 | | |
| * | ☑ | Expiry Date | Expiry Date | 11 | 80 | | |
| | ☑ | Item Id | Item Id | 7 | 50 | | |
| * | ☑ | Lot ID | Lot ID | 3 | 50 | | |
| * | ☑ | Pick QTY | Pick QTY | 6 | 50 | | |
| | ☑ | Sched Line No | Sched Line No | 8 | 50 | | |
| | ☑ | Seq No | Seq No | 10 | 50 | | |
| * | ☑ | Serial ID | Serial ID | 4 | 50 | | |
| * | ☑ | Storage Loc | Storage Loc | 1 | 50 | | |
| * | ☑ | UOM | UOM | 2 | 50 | | |

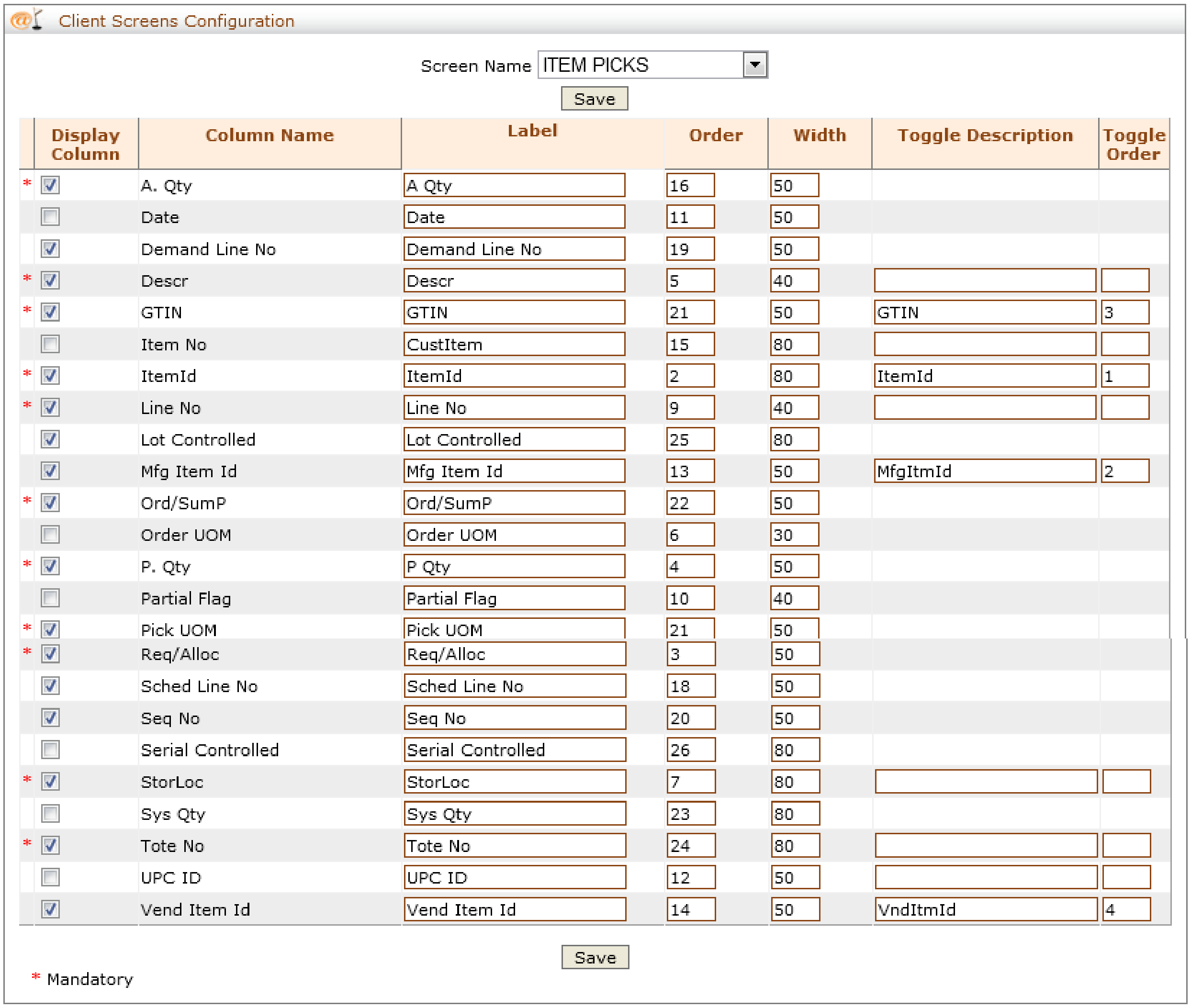
Save

* Mandatory

**Figure 118**

**Item Picks - Client Screens Configuration:**


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



Client Screens Configuration

Screen Name ITEM PICKS

Save

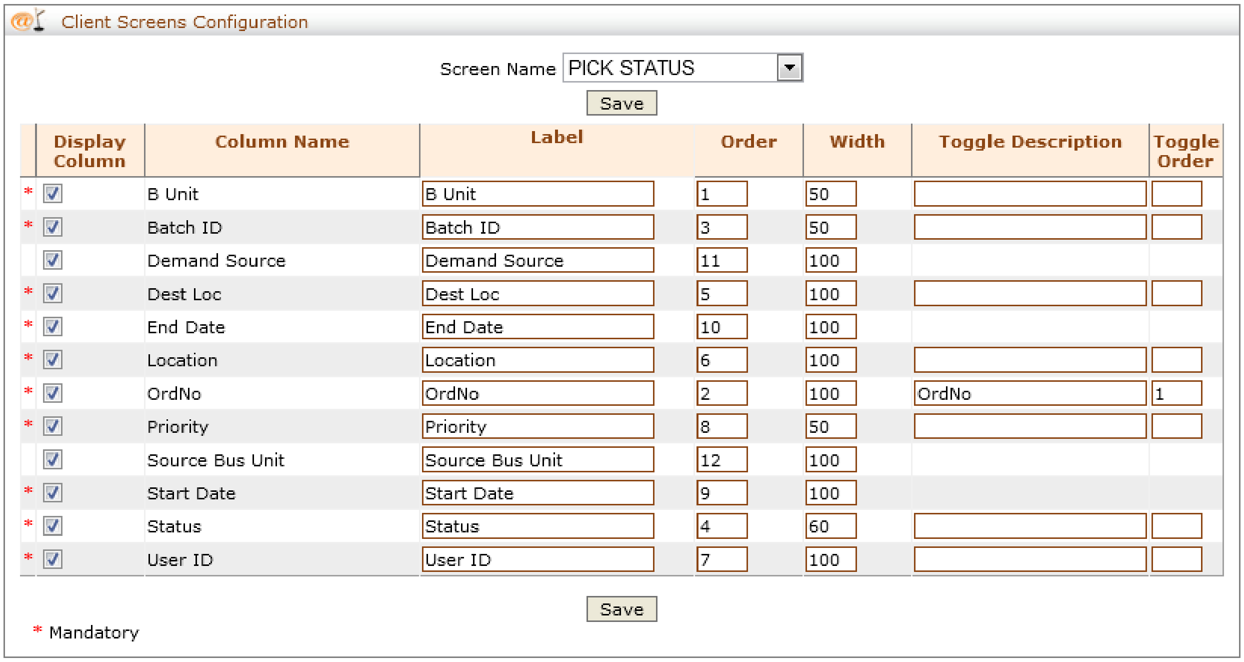
| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | A. Qty | A Qty | 16 | 50 | | |
| | ☐ | Date | Date | 11 | 50 | | |
| | ☑ | Demand Line No | Demand Line No | 19 | 50 | | |
| * | ☑ | Descr | Descr | 5 | 40 | | |
| * | ☑ | GTIN | GTIN | 21 | 50 | GTIN | 3 |
| | ☐ | Item No | CustItem | 15 | 80 | | |
| * | ☑ | ItemId | ItemId | 2 | 80 | ItemId | 1 |
| * | ☑ | Line No | Line No | 9 | 40 | | |
| | ☑ | Lot Controlled | Lot Controlled | 25 | 80 | | |
| | ☑ | Mfg Item Id | Mfg Item Id | 13 | 50 | MfgItmId | 2 |
| * | ☑ | Ord/SumP | Ord/SumP | 22 | 50 | | |
| | ☐ | Order UOM | Order UOM | 6 | 30 | | |
| * | ☑ | P. Qty | P Qty | 4 | 50 | | |
| | ☐ | Partial Flag | Partial Flag | 10 | 40 | | |
| * | ☑ | Pick UOM | Pick UOM | 21 | 50 | | |
| * | ☑ | Req/Alloc | Req/Alloc | 3 | 50 | | |
| | ☑ | Sched Line No | Sched Line No | 18 | 50 | | |
| | ☑ | Seq No | Seq No | 20 | 50 | | |
| | ☐ | Serial Controlled | Serial Controlled | 26 | 80 | | |
| * | ☑ | StorLoc | StorLoc | 7 | 80 | | |
| | ☐ | Sys Qty | Sys Qty | 23 | 80 | | |
| * | ☑ | Tote No | Tote No | 24 | 80 | | |
| | ☐ | UPC ID | UPC ID | 12 | 50 | | |
| | ☑ | Vend Item Id | Vend Item Id | 14 | 50 | VndItmId | 4 |

Save

* Mandatory

Figure 119

**Pick Status - Client Screens Configuration:**

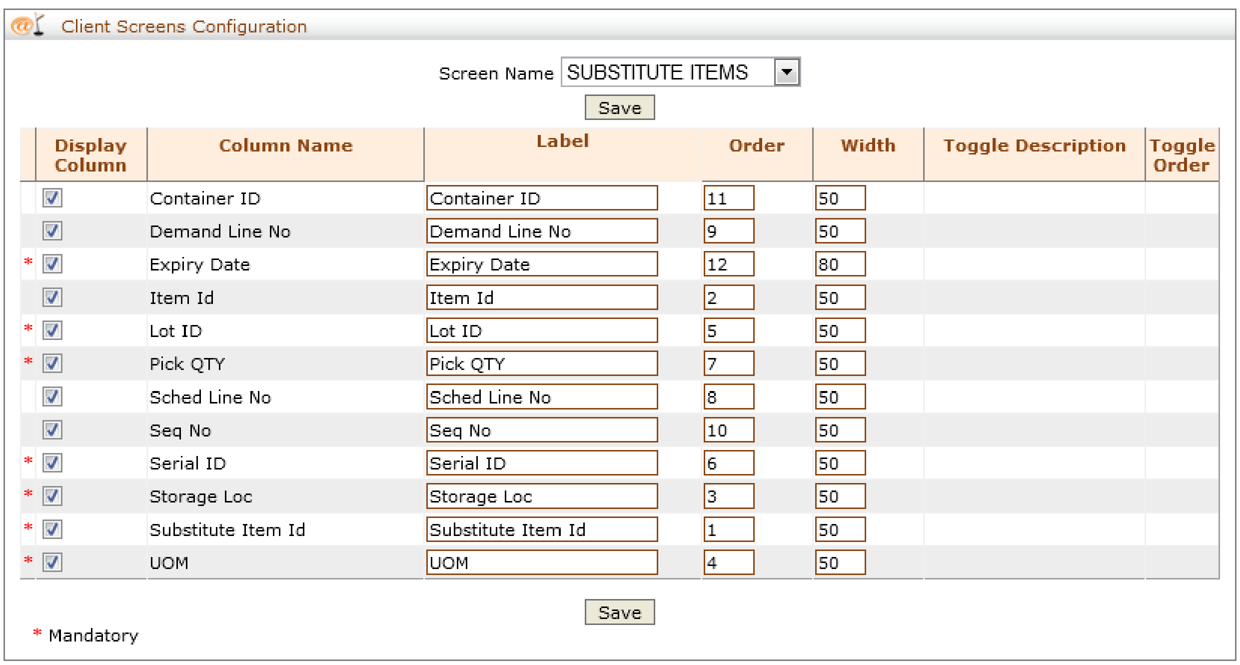



| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | B Unit | B Unit | 1 | 50 | | |
| * | ☑ | Batch ID | Batch ID | 3 | 50 | | |
| | ☑ | Demand Source | Demand Source | 11 | 100 | | |
| * | ☑ | Dest Loc | Dest Loc | 5 | 100 | | |
| * | ☑ | End Date | End Date | 10 | 100 | | |
| * | ☑ | Location | Location | 6 | 100 | | |
| * | ☑ | OrdNo | OrdNo | 2 | 100 | OrdNo | 1 |
| * | ☑ | Priority | Priority | 8 | 50 | | |
| | ☑ | Source Bus Unit | Source Bus Unit | 12 | 100 | | |
| * | ☑ | Start Date | Start Date | 9 | 100 | | |
| * | ☑ | Status | Status | 4 | 60 | | |
| * | ☑ | User ID | User ID | 7 | 100 | | |



Figure 120

## Substitute Items - Client Screens Configuration:




| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| | ☑ | Container ID | Container ID | 11 | 50 | | |
| | ☑ | Demand Line No | Demand Line No | 9 | 50 | | |
| * | ☑ | Expiry Date | Expiry Date | 12 | 80 | | |
| | ☑ | Item Id | Item Id | 2 | 50 | | |
| * | ☑ | Lot ID | Lot ID | 5 | 50 | | |
| * | ☑ | Pick QTY | Pick QTY | 7 | 50 | | |
| | ☑ | Sched Line No | Sched Line No | 8 | 50 | | |
| | ☑ | Seq No | Seq No | 10 | 50 | | |
| * | ☑ | Serial ID | Serial ID | 6 | 50 | | |
| * | ☑ | Storage Loc | Storage Loc | 3 | 50 | | |
| * | ☑ | Substitute Item Id | Substitute Item Id | 1 | 50 | | |
| * | ☑ | UOM | UOM | 4 | 50 | | |



Figure 121

**Par Management Pick - Client Screens Configuration:**

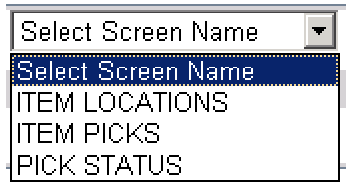
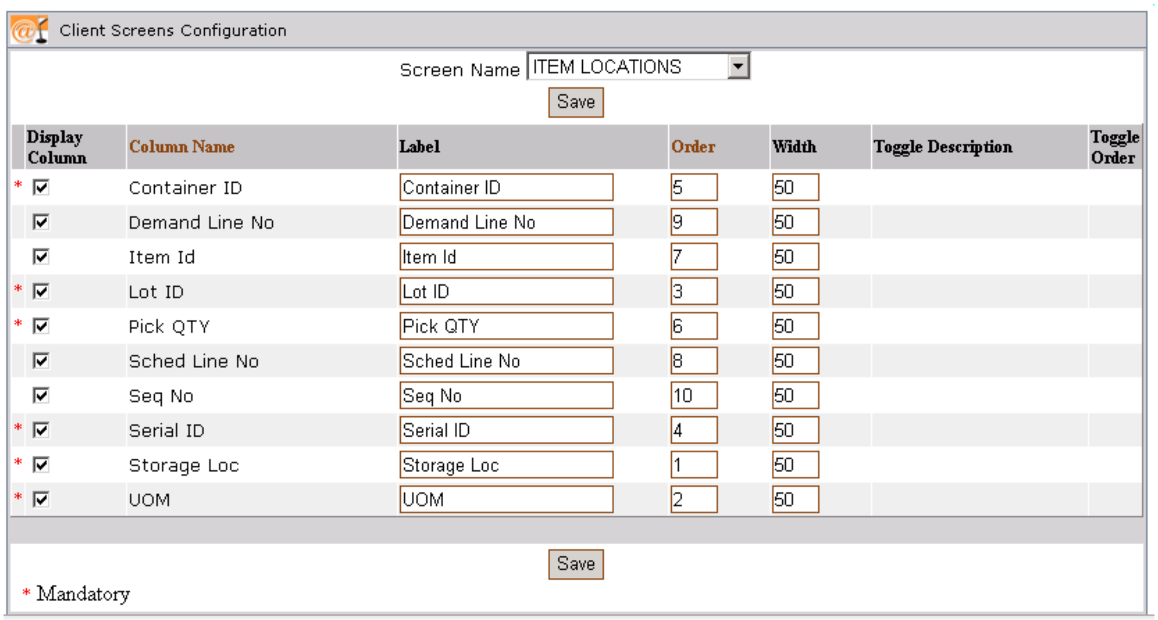



**Figure 122**

**Item Locations - Client Screens Configuration:**



Client Screens Configuration

Screen Name ITEM LOCATIONS

Save

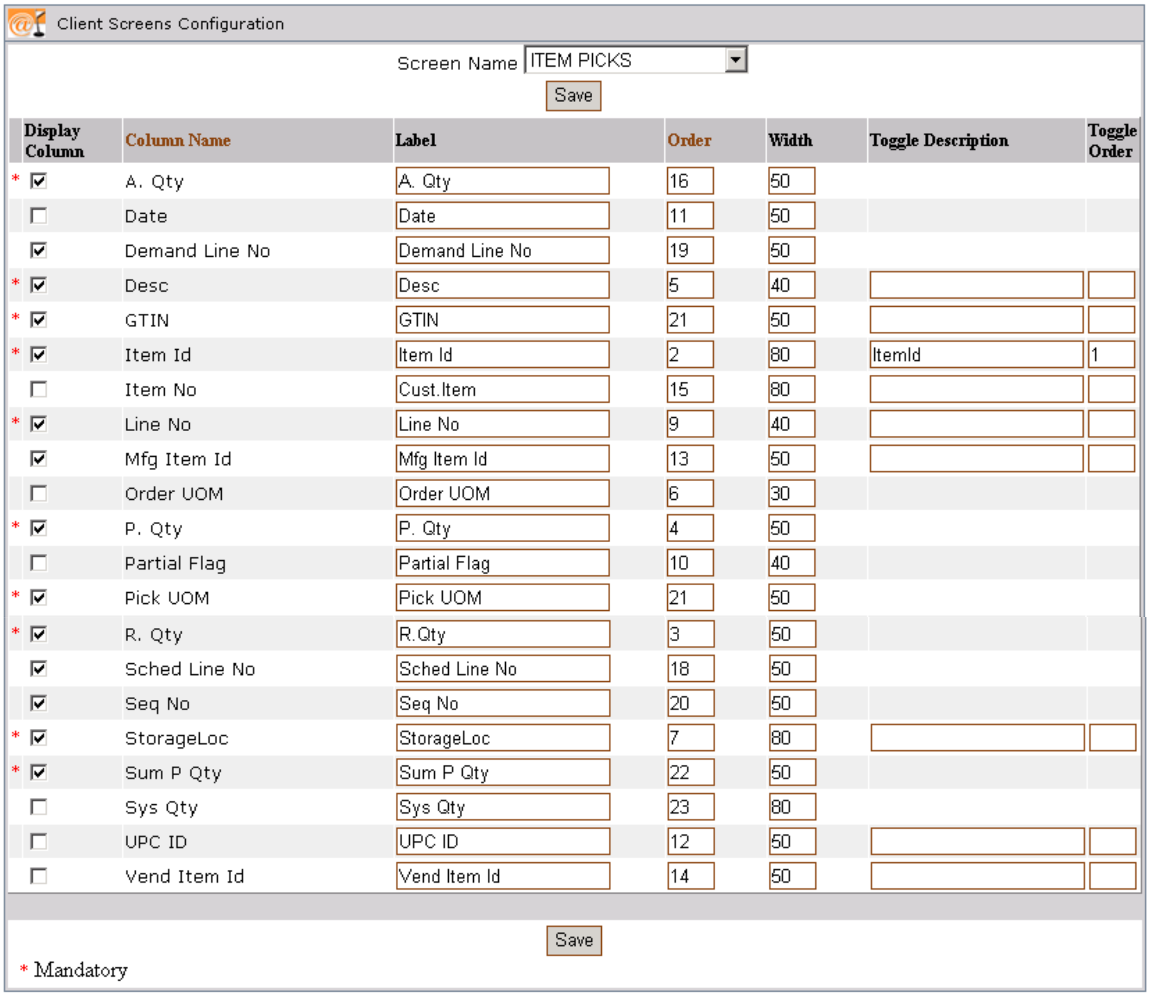
| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Container ID | Container ID | 5 | 50 | | |
| | ☑ | Demand Line No | Demand Line No | 9 | 50 | | |
| | ☑ | Item Id | Item Id | 7 | 50 | | |
| * | ☑ | Lot ID | Lot ID | 3 | 50 | | |
| * | ☑ | Pick QTY | Pick QTY | 6 | 50 | | |
| | ☑ | Sched Line No | Sched Line No | 8 | 50 | | |
| | ☑ | Seq No | Seq No | 10 | 50 | | |
| * | ☑ | Serial ID | Serial ID | 4 | 50 | | |
| * | ☑ | Storage Loc | Storage Loc | 1 | 50 | | |
| * | ☑ | UOM | UOM | 2 | 50 | | |

Save

* Mandatory

**Figure 123**

**Item Picks - Client Screens Configuration:**



Client Screens Configuration

Screen Name ITEM PICKS

Save

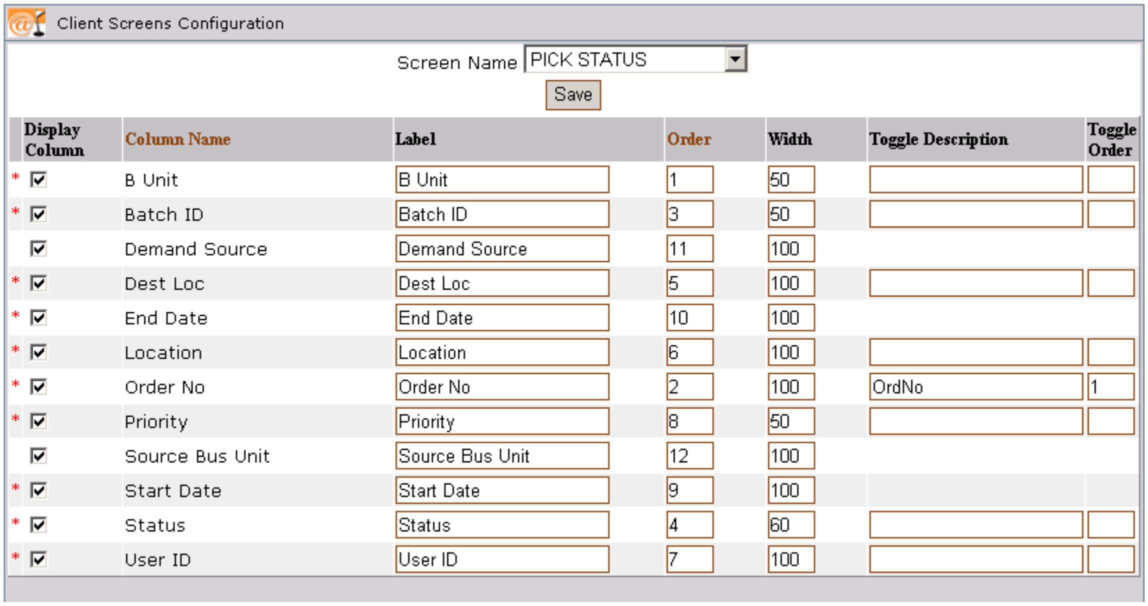
| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | A. Qty | A. Qty | 16 | 50 | | |
| ☐ | Date | Date | 11 | 50 | | |
| ☑ | Demand Line No | Demand Line No | 19 | 50 | | |
| * ☑ | Desc | Desc | 5 | 40 | | |
| * ☑ | GTIN | GTIN | 21 | 50 | | |
| * ☑ | Item Id | Item Id | 2 | 80 | ItemId | 1 |
| ☐ | Item No | Cust.Item | 15 | 80 | | |
| * ☑ | Line No | Line No | 9 | 40 | | |
| ☑ | Mfg Item Id | Mfg Item Id | 13 | 50 | | |
| ☐ | Order UOM | Order UOM | 6 | 30 | | |
| * ☑ | P. Qty | P. Qty | 4 | 50 | | |
| ☐ | Partial Flag | Partial Flag | 10 | 40 | | |
| * ☑ | Pick UOM | Pick UOM | 21 | 50 | | |
| * ☑ | R. Qty | R.Qty | 3 | 50 | | |
| ☑ | Sched Line No | Sched Line No | 18 | 50 | | |
| ☑ | Seq No | Seq No | 20 | 50 | | |
| * ☑ | StorageLoc | StorageLoc | 7 | 80 | | |
| * ☑ | Sum P Qty | Sum P Qty | 22 | 50 | | |
| ☐ | Sys Qty | Sys Qty | 23 | 80 | | |
| ☐ | UPC ID | UPC ID | 12 | 50 | | |
| ☐ | Vend Item Id | Vend Item Id | 14 | 50 | | |

Save

* Mandatory

**Figure 124**

**Pick Status - Client Screens Configuration:**



Client Screens Configuration

Screen Name: PICK STATUS

Save

| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | B Unit | B Unit | 1 | 50 | | |
| * ☑ | Batch ID | Batch ID | 3 | 50 | | |
| ☑ | Demand Source | Demand Source | 11 | 100 | | |
| * ☑ | Dest Loc | Dest Loc | 5 | 100 | | |
| * ☑ | End Date | End Date | 10 | 100 | | |
| * ☑ | Location | Location | 6 | 100 | | |
| * ☑ | Order No | Order No | 2 | 100 | OrdNo | 1 |
| * ☑ | Priority | Priority | 8 | 50 | | |
| ☑ | Source Bus Unit | Source Bus Unit | 12 | 100 | | |
| * ☑ | Start Date | Start Date | 9 | 100 | | |
| * ☑ | Status | Status | 4 | 60 | | |
| * ☑ | User ID | User ID | 7 | 100 | | |

Figure 125

## Putaway - Client Screens Configuration:

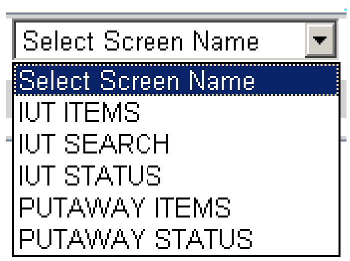
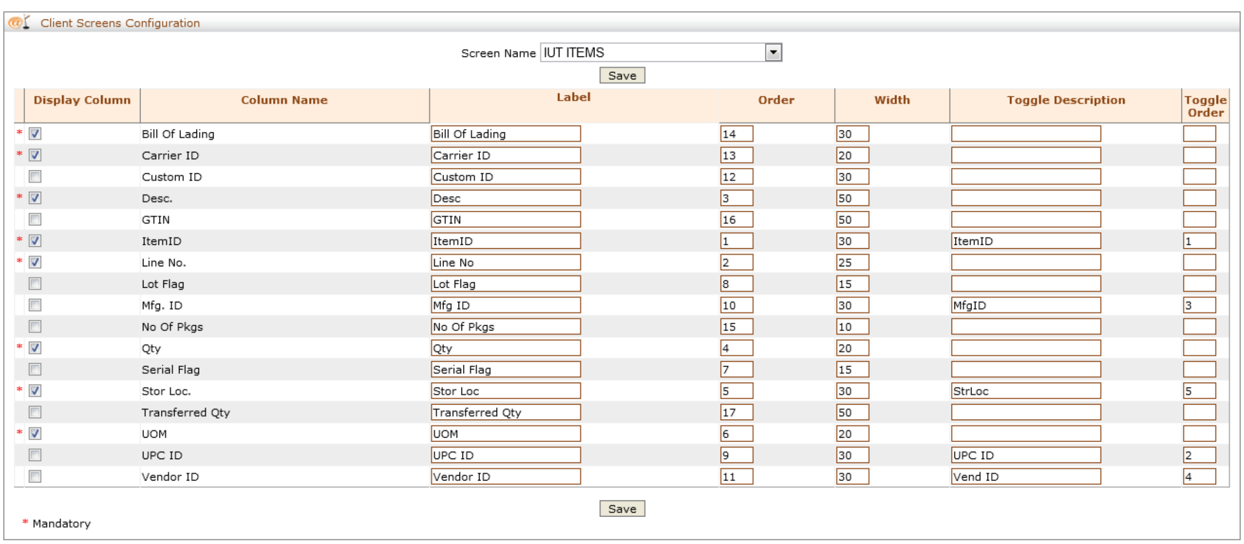



Figure 126

## IUT Items - Client Screens Configuration:



Client Screens Configuration

Screen Name: IUT ITEMS

Save

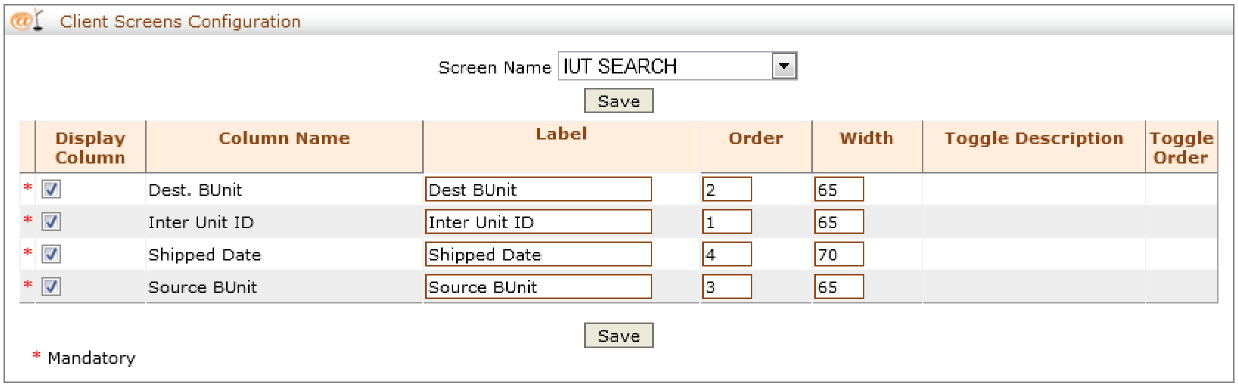
| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | Bill Of Lading | Bill Of Lading | 14 | 30 | | |
| * ☑ | Carrier ID | Carrier ID | 13 | 20 | | |
| ☐ | Custom ID | Custom ID | 12 | 30 | | |
| * ☑ | Desc. | Desc | 3 | 50 | | |
| ☐ | GTIN | GTIN | 16 | 50 | | |
| * ☑ | ItemID | ItemID | 1 | 30 | ItemID | 1 |
| * ☑ | Line No. | Line No | 2 | 25 | | |
| ☐ | Lot Flag | Lot Flag | 8 | 15 | | |
| ☐ | Mfg. ID | Mfg ID | 10 | 30 | MfgID | 3 |
| ☐ | No Of Pkgs | No Of Pkgs | 15 | 10 | | |
| * ☑ | Qty | Qty | 4 | 20 | | |
| ☐ | Serial Flag | Serial Flag | 7 | 15 | | |
| * ☑ | Stor Loc. | Stor Loc | 5 | 30 | StrLoc | 5 |
| ☐ | Transferred Qty | Transferred Qty | 17 | 50 | | |
| * ☑ | UOM | UOM | 6 | 20 | | |
| ☐ | UPC ID | UPC ID | 9 | 30 | UPC ID | 2 |
| ☐ | Vendor ID | Vendor ID | 11 | 30 | Vend ID | 4 |

Save

* Mandatory

Figure 127

## IUT Search - Client Screens Configuration:


Client Screens Configuration

Screen Name: IUT SEARCH

Save

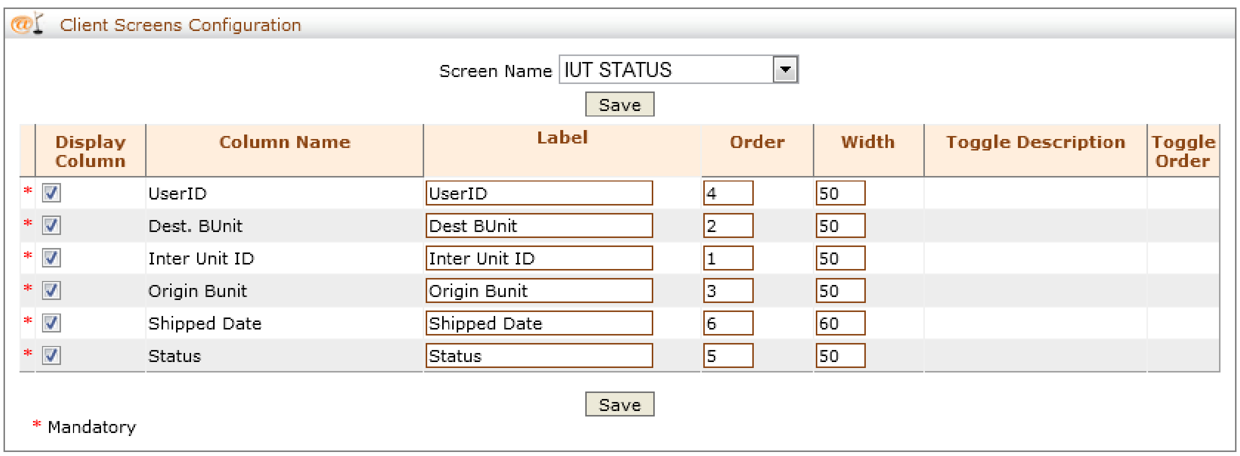
| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Dest. BUnit | Dest BUnit | 2 | 65 | | |
| * | ☑ | Inter Unit ID | Inter Unit ID | 1 | 65 | | |
| * | ☑ | Shipped Date | Shipped Date | 4 | 70 | | |
| * | ☑ | Source BUnit | Source BUnit | 3 | 65 | | |

Save

* Mandatory

Figure 128

## IUT Status - Client Screens Configuration:


Client Screens Configuration

Screen Name: IUT STATUS

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | UserID | UserID | 4 | 50 | | |
| * | ☑ | Dest. BUnit | Dest BUnit | 2 | 50 | | |
| * | ☑ | Inter Unit ID | Inter Unit ID | 1 | 50 | | |
| * | ☑ | Origin Bunit | Origin Bunit | 3 | 50 | | |
| * | ☑ | Shipped Date | Shipped Date | 6 | 60 | | |
| * | ☑ | Status | Status | 5 | 50 | | |

Save

* Mandatory

Figure 129

## Putaway Items - Client Screens Configuration:


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

Client Screens Configuration

Screen Name: PUTAWAY ITEMS

Save

| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | Business Unit | Business Unit | 18 | 80 | | |
| ☐ | Date | Date | 19 | 50 | | |
| * ☑ | Descr | Descr | 6 | 80 | | |
| * ☑ | GTIN | GTIN | 21 | 50 | GTIN | 3 |
| * ☑ | Item ID | Item ID | 5 | 40 | ItemId | 1 |
| * ☑ | Line No | Line No | 9 | 40 | | |
| ☑ | Manf Item ID | Manf Item ID | 12 | 80 | MfgItmId | 2 |
| * ☑ | PO ID | PO ID | 2 | 50 | | |
| * ☑ | Putaway Plan ID | Putaway Plan Id | 8 | 50 | | |
| * ☑ | Putaway Qty | Putaway Qty | 3 | 40 | | |
| ☑ | Received Qty | Received Qty | 4 | 50 | | |
| ☐ | Stor. Area | Storage Area | 13 | 80 | | |
| ☐ | Stor. level 1 | Storage Level 1 | 14 | 40 | | |
| ☐ | Stor. level 2 | Storage Level 2 | 15 | 50 | | |
| ☐ | Stor. level 3 | Storage Level 3 | 16 | 50 | | |
| ☐ | Stor. level 4 | Storage Level 4 | 17 | 50 | | |
| * ☑ | Storage Location | Storage Location | 1 | 30 | | |
| * ☑ | UOM | UOM | 7 | 50 | | |
| ☐ | UPC ID | UPC ID | 11 | 50 | | |
| ☑ | Vend Item ID | Vend Item ID | 10 | 50 | VndItmId | 4 |

Save

* Mandatory

**Figure 129**

## Putaway Status - Client Screens Configuration:

Client Screens Configuration

Screen Name: PUTAWAY STATUS

Save

| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | B Unit | B Unit | 1 | 50 | | |
| ☐ | End time | End time | 11 | 100 | | |
| * ☑ | Plan ID | Plan ID | 2 | 60 | | |
| * ☑ | PO ID | PO ID | 3 | 100 | | |
| ☐ | Rec ID | Rec ID | 6 | 100 | | |
| ☐ | Staged Date | Staged Date | 9 | 100 | | |
| ☐ | Start time | Start time | 10 | 100 | | |
| * ☑ | Status | Status | 4 | 60 | | |
| ☐ | Trans ID | Trans ID | 7 | 100 | | |
| ☐ | Update Date | Update Date | 5 | 100 | | |
| ☐ | User ID | User ID | 5 | 100 | | |
| ☐ | Vend ID | Vend ID | 8 | 100 | | |

Save

* Mandatory

**Figure 130**

## Stock Issue - Client Screens Configuration:

Select Screen Name

Select Screen Name
ADD/EDIT ITEMS
ITEM INQUIRY
ITEM ISSUE
STOCK STATUS

Figure 130

## Add/Edit Items - Client Screens Configuration:

Client Screens Configuration

Screen Name ADD/EDIT ITEMS

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Act.Iss.Qty | ActIssQty | 9 | 40 | | |
| * | ☑ | Act.Iss.Uom | ActIssUom | 10 | 40 | | |
| * | ☑ | Expiry Date | Expiry Date | 6 | 40 | | |
| * | ☑ | Lot ID | Lot ID | 3 | 80 | | |
| | ☑ | Qty | Qty | 2 | 40 | | |
| * | ☑ | Serial ID | Serial ID | 4 | 80 | | |
| * | ☑ | Stor Loc. | Stor Loc | 8 | 40 | | |
| * | ☑ | System Qty | System Qty | 5 | 40 | | |
| * | ☑ | UOM | UOM | 7 | 40 | | |

Save

* Mandatory

Figure 131

## Item Inquiry - Client Screens Configuration:

Client Screens Configuration

Screen Name ITEM INQUIRY

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | B Unit | B Unit | 16 | 80 | | |
| | ☐ | Cont. ID | Cont ID | 18 | 50 | | |
| | ☐ | Cust. Item | Cust Item | 12 | 80 | | |
| * | ☑ | Descr. | Descr | 2 | 80 | | |
| | ☐ | Expiry Date | Expiry Date | 20 | 80 | | |
| | ☑ | GTIN | GTIN | 21 | 0 | | |
| * | ☑ | Item ID | Item ID | 1 | 80 | | |
| | ☐ | Lot Flag | Lot Flag | 11 | 30 | | |
| | ☐ | Lot ID | Lot ID | 8 | 80 | | |
| | ☐ | Manf. Item ID | Manf Item ID | 13 | 0 | | |
| | ☐ | Price | Price | 9 | 60 | | |
| * | ☑ | Qty | Qty | 3 | 40 | | |
| | ☐ | Serial Flag | Serial Flag | 10 | 30 | | |
| | ☐ | Serial ID | Serial ID | 7 | 80 | | |
| | ☐ | Staged Date | Staged Date | 17 | 80 | | |
| | ☐ | Stor Loc | Stor Loc | 5 | 60 | | |
| * | ☑ | UOM | UOM | 4 | 40 | | |
| | ☐ | UPC ID | UPC ID | 15 | 0 | | |
| | ☐ | Vendor ID | Vendor ID | 19 | 80 | | |
| | ☐ | Vendor Item ID | Vendor Item ID | 14 | 0 | | |

Save

* Mandatory

Figure 132

## Item Issue - Client Screens Configuration:

Client Screens Configuration

Screen Name: ITEM ISSUE

Save

| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | Act.Iss.Qty | ActIssQty | 27 | 40 | | |
| * ☑ | Act.Iss.Uom | ActIssUom | 28 | 40 | | |
| ☐ | Cust. Item | Cust Item | 12 | 80 | | |
| * ☑ | Descr. | Descr | 6 | 80 | | |
| ☑ | GTIN | GTIN | 21 | 50 | | |
| * ☑ | Item Id | Item Id | 1 | 100 | ItemId | 1 |
| ☐ | Lot Flag | Lot Flag | 11 | 30 | | |
| ☐ | Lot ID | Lot ID | 8 | 80 | | |
| ☑ | Manf Item ID | Manf Item ID | 24 | 80 | Manf Item ID | 6 |
| ☐ | Order No | Order No | 5 | 80 | | |
| ☐ | Price | Price | 9 | 60 | | |
| * ☑ | Qty | Qty | 2 | 80 | | |
| ☐ | S. Qty | S Qty | 3 | 80 | | |
| ☐ | Serial Flag | Serial Flag | 10 | 30 | | |
| ☐ | Serial ID | Serial ID | 7 | 80 | | |
| * ☑ | Stor Loc | Stor Loc | 4 | 100 | | |
| * ☑ | UOM | UOM | 3 | 80 | | |
| ☑ | UPC ID | UPC ID | 26 | 80 | UPC ID | 8 |
| ☑ | Vendor Item ID | Vendor Item ID | 25 | 80 | Vendor Item ID | 7 |

Save

* Mandatory

**Figure 133**

## Stock Status - Client Screens Configuration:

Client Screens Configuration

Screen Name: STOCK STATUS

Save

| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | BUnit | BUnit | 3 | 120 | | |
| ☐ | Dept ID | Dept ID | 4 | 60 | | |
| ☑ | Distrib Type | Distrib Type | 25 | 80 | | |
| * ☑ | Issue Date | Issue Date | 1 | 50 | | |
| ☐ | Location | Location | 5 | 60 | | |
| ☐ | Order No | Order No | 7 | 0 | | |
| ☐ | Patient ID | Patient ID | 8 | 0 | | |
| ☐ | Signature ID | Signature ID | 9 | 60 | | |
| ☐ | Start Date | Start Date | 10 | 50 | | |
| * ☑ | Status | Status | 2 | 20 | | |
| * ☑ | User ID | User ID | 6 | 120 | | |

Save

* Mandatory

**Figure 134**

## Bin to Bin - Client Screens Configuration:

## Bin to Bin Transfer - Client Screens Configuration:

Client Screens Configuration

Screen Name: Bin To Bin Transfer

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| | ☐ | Container | Container | 12 | 50 | | |
| | ☐ | Cust Item ID | Cust Item ID | 21 | 50 | | |
| * | ☑ | Dest Stor Loc | Dest Stor Loc | 9 | 100 | | |
| | ☐ | GTIN | GTIN | 22 | 50 | | |
| * | ☑ | Inv Business Unit | Inv Business Unit | 6 | 50 | | |
| * | ☑ | Item Descr | Item Descr | 3 | 50 | | |
| * | ☑ | Item ID | Item ID | 2 | 50 | ItemID | 1 |
| | ☐ | Lot ID | Lot ID | 10 | 50 | | |
| | ☐ | Mfg Item ID | Mfg Item ID | 19 | 50 | | |
| * | ☑ | Origin Stor Loc | Origin Stor Loc | 1 | 50 | | |
| * | ☑ | Qty | Qty | 4 | 50 | | |
| | ☐ | Serial ID | Serial ID | 11 | 50 | | |
| | ☐ | Stor Level 1 | Stor Level 1 | 14 | 50 | | |
| | ☐ | Stor Level 2 | Stor Level 2 | 15 | 50 | | |
| | ☐ | Stor Level 3 | Stor Level 3 | 16 | 50 | | |
| | ☐ | Stor Level 4 | Stor Level 4 | 17 | 50 | | |
| | ☐ | Storage Area | Storage Area | 13 | 50 | | |
| | ☐ | Transaction ID | Transaction ID | 23 | 50 | | |
| * | ☑ | UOM | UOM | 5 | 50 | | |
| | ☐ | UPC ID | UPC ID | 18 | 50 | | |
| * | ☑ | Update Date | Update Date | 8 | 50 | | |
| * | ☑ | User ID | User ID | 7 | 50 | | |
| | ☐ | Vend Item ID | Vend Item ID | 20 | 50 | | |

Save

* Mandatory

Figure 135

**Deliver - Client Screens Configuration:**

Select Screen Name

- Select Screen Name
- DELIVER
- ITEMS
- SIGN CONFIRM

Figure 136

**Deliver - Client Screens Configuration:**

Client Screens Configuration

Screen Name DELIVER

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Attn To | Attn To | 6 | 100 | | |
| * | ☑ | Descr | Descr | 5 | 50 | | |
| * | ☑ | Download UserID | Download UserID | 7 | 100 | | |
| * | ☑ | Item Type | Item Type | 4 | 50 | | |
| * | ☑ | Location | Location | 1 | 100 | | |
| * | ☑ | PO/Order No | PO/Order No | 2 | 100 | | |
| | ☐ | SET ID | SET ID | 8 | 50 | | |
| * | ☑ | Status | Status | 3 | 100 | | |
| | ☐ | Tracking No | Tracking No | 9 | 100 | | |

Save

* Mandatory

Figure 137

## Items - Client Screens Configuration:

Client Screens Configuration

Screen Name ITEMS

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| | ☐ | Bill Of Lading | Bill Of Lading | 15 | 80 | | |
| * | ☑ | Descr | Descr | 3 | 100 | | |
| * | ☑ | Download UserID | Download UserID | 9 | 100 | | |
| | ☐ | Due Date | Due Date | 12 | 90 | | |
| * | ☑ | Item ID | Item ID | 2 | 100 | ITEM ID | 1 |
| * | ☑ | Location | Location | 6 | 100 | | |
| | ☐ | Manf Item ID | Manf Item ID | 17 | 100 | Manf Item ID | 3 |
| * | ☑ | PO ID | PO ID | 7 | 100 | | |
| * | ☑ | Qty | Qty | 4 | 50 | | |
| * | ☑ | Receiver | Receiver | 13 | 80 | | |
| | ☑ | Receiver ID | Receiver ID | 14 | 100 | | |
| | ☐ | Recv Date | Recv Date | 16 | 90 | | |
| | ☐ | SET ID | SET ID | 8 | 50 | | |
| * | ☑ | ShipTo ID | ShipTo ID | 19 | 0 | | |
| * | ☑ | Status | Status | 10 | 100 | | |
| * | ☑ | Tracking No | Tracking No | 1 | 100 | Tracking No | 2 |
| * | ☑ | Transaction ID | Transaction ID | 20 | 0 | | |
| * | ☑ | UOM | UOM | 5 | 100 | | |
| | ☐ | UPN ID | UPN ID | 11 | 100 | UPN ID | 4 |
| | ☐ | Vend Item ID | Vend Item ID | 18 | 100 | Vend Item ID | 5 |

Save

* Mandatory

Figure 138

## Sign Confirm - Client Screens Configuration:

Client Screens Configuration

Screen Name SIGN CONFIRM

Save

| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | Attn To | Attn To | 11 | 100 | | |
| * ☑ | Description | Description | 2 | 100 | | |
| * ☑ | Download UserID | Download UserID | 9 | 100 | | |
| * ☑ | Item ID | Item ID | 5 | 100 | | |
| * ☑ | Item Type | Item Type | 7 | 50 | | |
| * ☑ | Loc Desc | Loc Desc | 6 | 100 | | |
| * ☑ | Location | Location | 1 | 100 | | |
| * ☑ | PO ID | PO ID | 4 | 100 | | |
| * ☑ | Qty | Qty | 3 | 50 | | |
| ☐ | Set ID | Set ID | 10 | 100 | | |
| * ☑ | Tracking No | Tracking No | 13 | 100 | | |
| ☐ | Trans ID | Trans ID | 8 | 100 | | |
| * ☑ | UOM | UOM | 12 | 50 | | |

Save

* Mandatory

Figure 139

### Par Management Deliver - Client Screens Configuration:

Select Screen Name

- Select Screen Name
- DELIVER
- ITEMS
- SIGN CONFIRM

Figure 140

### Deliver - Client Screens Configuration:

Client Screens Configuration

Screen Name DELIVER

Save

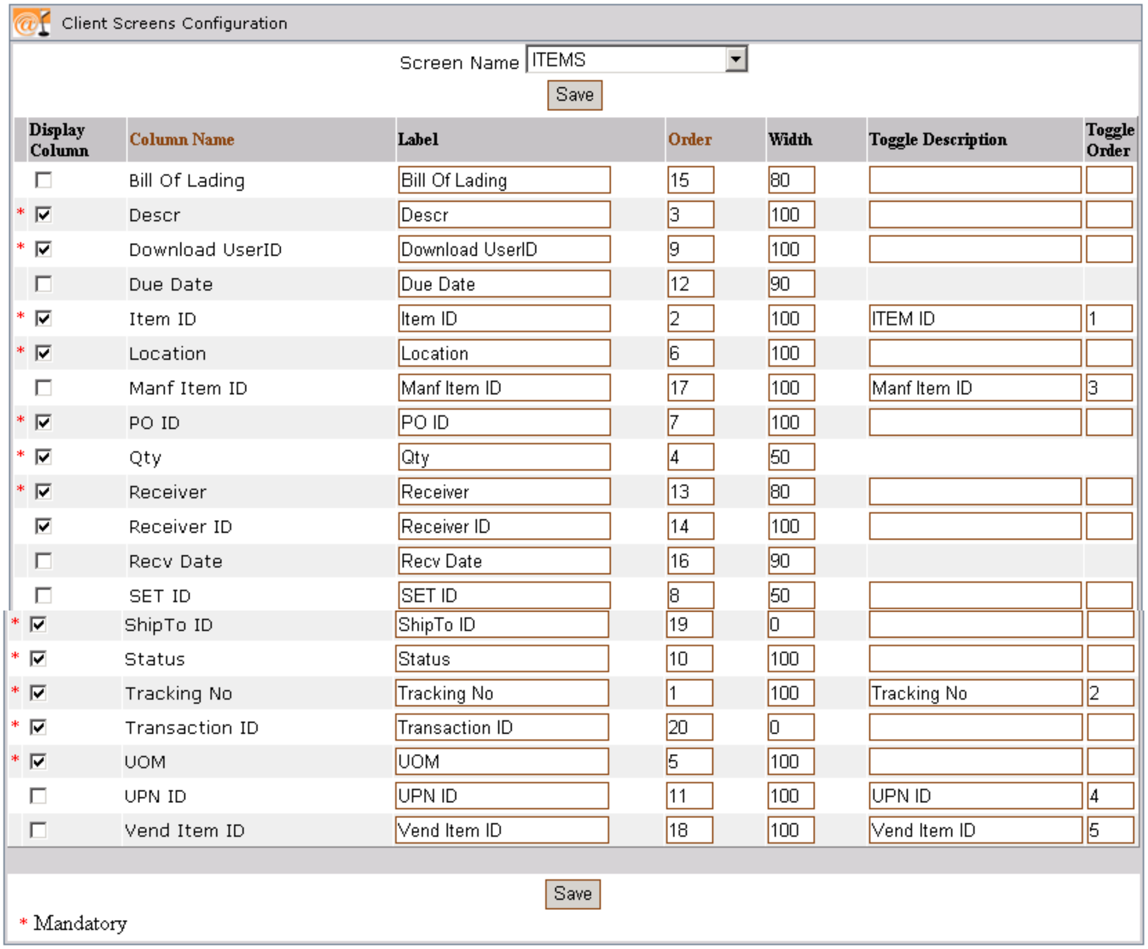
| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | Attn To | Attn To | 6 | 100 | | |
| * ☑ | Descr | Descr | 5 | 50 | | |
| * ☑ | Download UserID | Download UserID | 7 | 100 | | |
| * ☑ | Item Type | Item Type | 4 | 50 | | |
| * ☑ | Location | Location | 1 | 100 | | |
| * ☑ | PO ID | PO ID | 2 | 100 | | |
| ☐ | SET ID | SET ID | 8 | 50 | | |
| * ☑ | Status | Status | 3 | 100 | | |
| ☐ | Tracking No | Tracking No | 9 | 100 | | |

Save

* Mandatory

Figure 141

### Items - Client Screens Configuration:



Client Screens Configuration

Screen Name ITEMS

Save

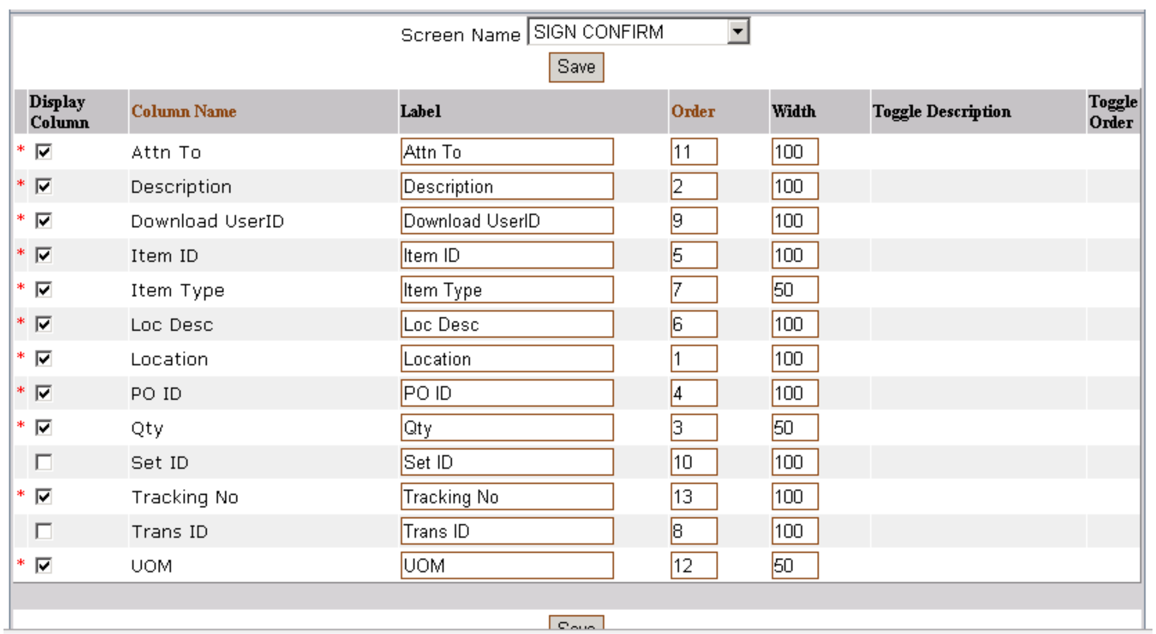
| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| ☐ | Bill Of Lading | Bill Of Lading | 15 | 80 | | |
| * ☑ | Descr | Descr | 3 | 100 | | |
| * ☑ | Download UserID | Download UserID | 9 | 100 | | |
| ☐ | Due Date | Due Date | 12 | 90 | | |
| * ☑ | Item ID | Item ID | 2 | 100 | ITEM ID | 1 |
| * ☑ | Location | Location | 6 | 100 | | |
| ☐ | Manf Item ID | Manf Item ID | 17 | 100 | Manf Item ID | 3 |
| * ☑ | PO ID | PO ID | 7 | 100 | | |
| * ☑ | Qty | Qty | 4 | 50 | | |
| * ☑ | Receiver | Receiver | 13 | 80 | | |
| ☑ | Receiver ID | Receiver ID | 14 | 100 | | |
| ☐ | Recv Date | Recv Date | 16 | 90 | | |
| ☐ | SET ID | SET ID | 8 | 50 | | |
| * ☑ | ShipTo ID | ShipTo ID | 19 | 0 | | |
| * ☑ | Status | Status | 10 | 100 | | |
| * ☑ | Tracking No | Tracking No | 1 | 100 | Tracking No | 2 |
| * ☑ | Transaction ID | Transaction ID | 20 | 0 | | |
| * ☑ | UOM | UOM | 5 | 100 | | |
| ☐ | UPN ID | UPN ID | 11 | 100 | UPN ID | 4 |
| ☐ | Vend Item ID | Vend Item ID | 18 | 100 | Vend Item ID | 5 |

Save

* Mandatory

**Figure 142**

### Sign Confirm - Client Screens Configuration:



Screen Name SIGN CONFIRM

Save

| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | Attn To | Attn To | 11 | 100 | | |
| * ☑ | Description | Description | 2 | 100 | | |
| * ☑ | Download UserID | Download UserID | 9 | 100 | | |
| * ☑ | Item ID | Item ID | 5 | 100 | | |
| * ☑ | Item Type | Item Type | 7 | 50 | | |
| * ☑ | Loc Desc | Loc Desc | 6 | 100 | | |
| * ☑ | Location | Location | 1 | 100 | | |
| * ☑ | PO ID | PO ID | 4 | 100 | | |
| * ☑ | Qty | Qty | 3 | 50 | | |
| ☐ | Set ID | Set ID | 10 | 100 | | |
| * ☑ | Tracking No | Tracking No | 13 | 100 | | |
| ☐ | Trans ID | Trans ID | 8 | 100 | | |
| * ☑ | UOM | UOM | 12 | 50 | | |

**Figure 142**

**Point of Use - Client Screens Configuration:**

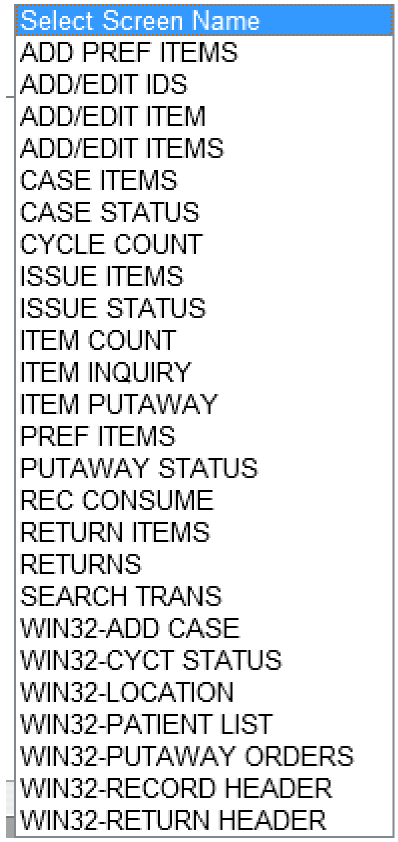
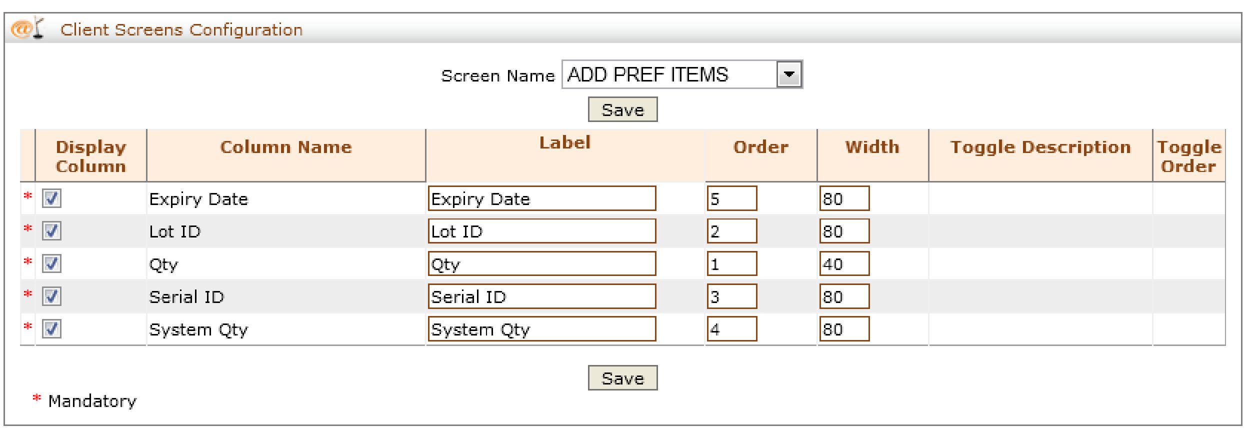



**Figure 143**

**Add Pref Items - Client Screens Configuration:**




| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Expiry Date | Expiry Date | 5 | 80 | | |
| * | ☑ | Lot ID | Lot ID | 2 | 80 | | |
| * | ☑ | Qty | Qty | 1 | 40 | | |
| * | ☑ | Serial ID | Serial ID | 3 | 80 | | |
| * | ☑ | System Qty | System Qty | 4 | 80 | | |

Save

* Mandatory

**Figure 144**

**Add/Edit IDs - Client Screens Configuration:**

Client Screens Configuration

Screen Name: ADD/EDIT IDS

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| | ☑ | Expiry Date | Expiry Date | 6 | 80 | | |
| | ☐ | Line No | Line No | 2 | 40 | | |
| * | ☑ | Lot ID | Lot ID | 3 | 80 | | |
| * | ☑ | Putaway Qty | Putaway Qty | 5 | 80 | | |
| * | ☑ | Serial ID | Serial ID | 4 | 80 | | |
| | ☐ | Trans ID | Trans ID | 1 | 40 | | |

Save

* Mandatory

Figure 145

### Add/Edit Item - Client Screens Configuration:

Client Screens Configuration

Screen Name: ADD/EDIT ITEM

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Expiry Date | Expiry Date | 5 | 80 | | |
| | ☐ | Item ID | Item ID | 1 | 80 | | |
| * | ☑ | Lot ID | Lot ID | 2 | 80 | | |
| * | ☑ | Qty | Qty | 4 | 40 | | |
| * | ☑ | Serial ID | Serial ID | 3 | 80 | | |

Save

* Mandatory

Figure 146

### Add/Edit Items - Client Screens Configuration:

Client Screens Configuration

Screen Name: ADD/EDIT ITEMS

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Expiry Date | Expiry Date | 6 | 80 | | |
| * | ☑ | Lot ID | Lot ID | 3 | 80 | | |
| * | ☑ | Qty | Qty | 2 | 80 | | |
| * | ☑ | Serial ID | Serial ID | 4 | 80 | | |
| * | ☑ | System Qty | System Qty | 5 | 80 | | |

Save

* Mandatory

Figure 147

### Case Items - Client Screens Configuration:

Client Screens Configuration

Screen Name: CASE ITEMS

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| | ☐ | CaseID | CaseID | 9 | 40 | | |
| * | ☑ | Comp | Comp | 5 | 60 | | |
| | ☐ | Cust Item | Cust Item | 12 | 80 | | |
| * | ☑ | Descr | Descr | 2 | 80 | | |
| * | ☑ | Item ID | Item ID | 1 | 80 | | |
| * | ☑ | Lot Flag | Lot Flag | 11 | 30 | | |
| * | ☑ | Lot ID | Lot ID | 7 | 50 | | |
| | ☐ | Price | Price | 8 | 40 | | |
| * | ☑ | Qty | Qty | 3 | 40 | | |
| * | ☑ | Serial Flag | Serial Flag | 10 | 30 | | |
| * | ☑ | Serial ID | Serial ID | 6 | 50 | | |
| * | ☑ | UOM | UOM | 4 | 40 | | |

Save

* Mandatory

**Figure 148**

### Case Status - Client Screens Configuration:

Client Screens Configuration

Screen Name: CASE STATUS

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | CaseID | CaseID | 1 | 80 | | |
| | ☐ | Issue Date | Issue Date | 5 | 80 | | |
| | ☐ | Patient ID | Patient ID | 4 | 60 | | |
| | ☐ | Physician | Physician | 3 | 80 | | |
| * | ☑ | PrefID | PrefID | 2 | 100 | | |
| | ☐ | Start Date | Start Date | 7 | 50 | | |
| * | ☑ | Status | Status | 2 | 80 | | |
| | ☐ | User ID | User ID | 6 | 80 | | |

Save

* Mandatory

**Figure 149**

### Cycle Count - Client Screens Configuration:


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

Client Screens Configuration

Screen Name: CYCLE COUNT

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| | ☐ | B Unit | B Unit | 2 | 60 | | |
| * | ☑ | Dept ID | Dept ID | 5 | 80 | | |
| | ☐ | Descr | Descr | 3 | 80 | | |
| | ☐ | End Date | End Date | 8 | 80 | | |
| * | ☑ | Par Location | Par Location | 1 | 80 | | |
| | ☐ | Start Date | Start Date | 7 | 80 | | |
| * | ☑ | Status | Status | 4 | 80 | | |
| | ☐ | Trans ID | Trans ID | 10 | 0 | | |
| | ☐ | Update Date | Update Date | 9 | 80 | | |
| * | ☑ | User ID | User ID | 6 | 80 | | |

Save

* Mandatory

**Figure 150**

## Issue Items - Client Screens Configuration:

Client Screens Configuration

Screen Name: ISSUE ITEMS

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| | ☐ | Comp | Comp | 5 | 60 | | |
| | ☐ | Cust Item | Cust Item | 13 | 80 | CustItm | 2 |
| * | ☑ | Descr | Descr | 2 | 80 | | |
| * | ☑ | Item ID | Item ID | 1 | 80 | ItemID | 1 |
| * | ☑ | Lot Flag | Lot Flag | 12 | 30 | | |
| * | ☑ | Lot ID | Lot ID | 8 | 50 | | |
| | ☐ | Order No | Order No | 10 | 40 | | |
| * | ☑ | PrefID | PrefID | 14 | 80 | PrefID | 2 |
| | ☐ | Price | Price | 9 | 40 | | |
| * | ☑ | Qty | Qty | 3 | 40 | | |
| * | ☑ | Serial Flag | Serial Flag | 11 | 30 | | |
| * | ☑ | Serial ID | Serial ID | 7 | 50 | | |
| * | ☑ | UOM | UOM | 4 | 40 | | |

Save

* Mandatory

**Figure 151**

## Issue Status - Client Screens Configuration:

Client Screens Configuration

Screen Name: ISSUE STATUS

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| | ☐ | Bed No | Bed No | 8 | 60 | Bed No | 2 |
| | ☐ | Encounter ID | Encounter ID | 5 | 60 | | |
| * | ☑ | Issue Date | Issue Date | 1 | 80 | | |
| | ☐ | Order No | Order No | 10 | 0 | | |
| * | ☑ | Patient ID | Patient ID | 6 | 60 | Patient | 1 |
| | ☐ | Physician | Physician | 3 | 80 | | |
| | ☐ | Procedure Code | Procedure Code | 4 | 50 | | |
| | ☐ | Reason | Reason | 9 | 60 | | |
| | ☐ | Start Date | Start Date | 12 | 50 | | |
| * | ☑ | Status | Status | 2 | 80 | | |
| * | ☑ | User ID | User ID | 11 | 80 | | |

Save

* Mandatory

**Figure 152**

## Item Count - Client Screens Configuration:

Client Screens Configuration

Screen Name: ITEM COUNT

Save

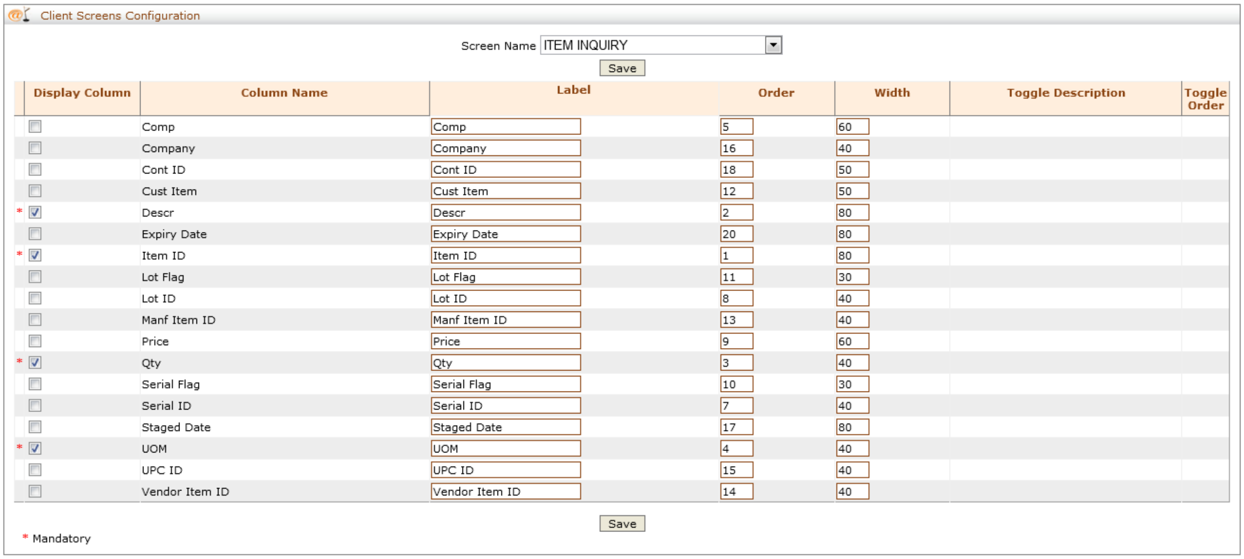
| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Comp | Comp | 6 | 60 | | |
| | ☐ | Cust Item ID | Cust Item ID | 11 | 80 | CustItm | 2 |
| * | ☑ | Descr | Descr | 2 | 80 | | |
| * | ☑ | GTIN | GTIN | 18 | 80 | GTIN | 6 |
| * | ☑ | Item ID | Item ID | 1 | 80 | ItemID | 1 |
| | ☐ | Lot Flag | Lot Flag | 10 | 30 | | |
| * | ☑ | Lot ID | Lot ID | 8 | 80 | | |
| | ☐ | Manf Item ID | Manf Item ID | 12 | 0 | MItmID | 3 |
| * | ☑ | Qty | Qty | 3 | 40 | | |
| | ☐ | Scan Flag | Scan Flag | 16 | 30 | | |
| | ☐ | Serial Flag | Serial Flag | 9 | 30 | | |
| * | ☑ | Serial ID | Serial ID | 7 | 80 | | |
| * | ☑ | System Qty | System Qty | 4 | 80 | | |
| | ☐ | Trans ID | Trans ID | 17 | 40 | | |
| * | ☑ | UOM | UOM | 5 | 40 | | |
| | ☐ | UPC ID | UPC ID | 14 | 0 | UPCID | 5 |
| | ☐ | Update Date | Update Date | 15 | 80 | | |
| | ☐ | Vendor Item ID | Vendor Item ID | 13 | 0 | VItmID | 4 |

Save

* Mandatory

**Figure 153**

## Item Inquiry - Client Screens Configuration:



Client Screens Configuration

Screen Name: ITEM INQUIRY

Save

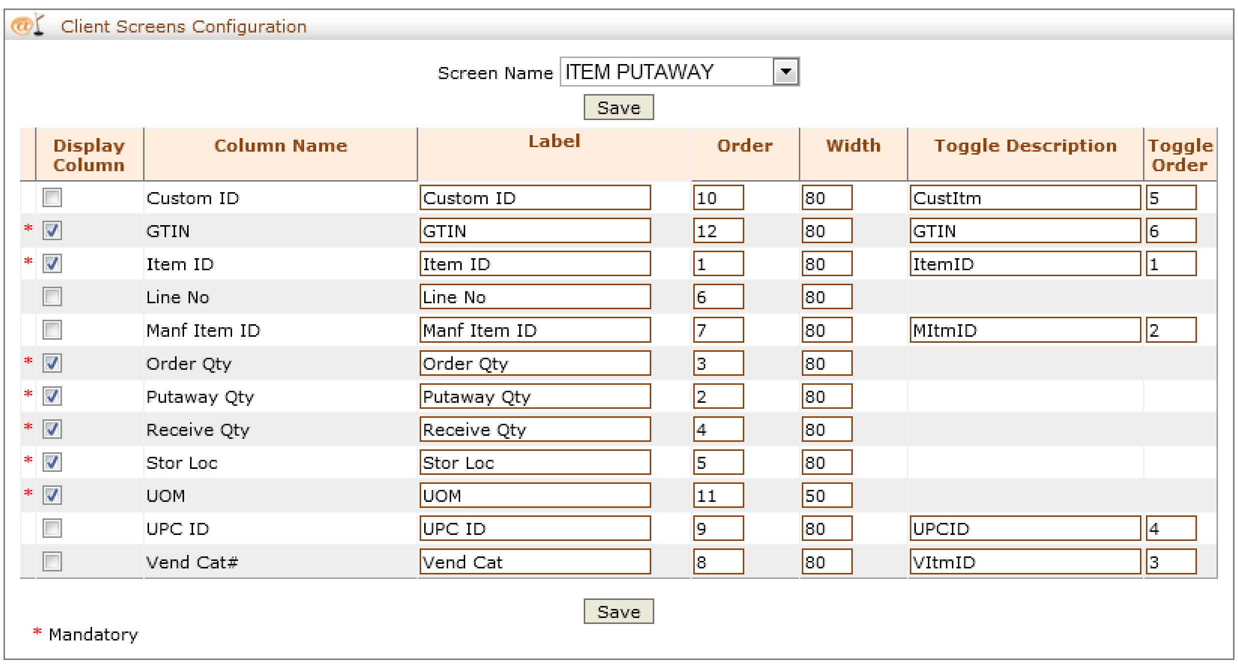
| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| | ☐ | Comp | Comp | 5 | 60 | | |
| | ☐ | Company | Company | 16 | 40 | | |
| | ☐ | Cont ID | Cont ID | 18 | 50 | | |
| | ☐ | Cust Item | Cust Item | 12 | 50 | | |
| * | ☑ | Descr | Descr | 2 | 80 | | |
| | ☐ | Expiry Date | Expiry Date | 20 | 80 | | |
| * | ☑ | Item ID | Item ID | 1 | 80 | | |
| | ☐ | Lot Flag | Lot Flag | 11 | 30 | | |
| | ☐ | Lot ID | Lot ID | 8 | 40 | | |
| | ☐ | Manf Item ID | Manf Item ID | 13 | 40 | | |
| | ☐ | Price | Price | 9 | 60 | | |
| * | ☑ | Qty | Qty | 3 | 40 | | |
| | ☐ | Serial Flag | Serial Flag | 10 | 30 | | |
| | ☐ | Serial ID | Serial ID | 7 | 40 | | |
| | ☐ | Staged Date | Staged Date | 17 | 80 | | |
| * | ☑ | UOM | UOM | 4 | 40 | | |
| | ☐ | UPC ID | UPC ID | 15 | 40 | | |
| | ☐ | Vendor Item ID | Vendor Item ID | 14 | 40 | | |

Save

* Mandatory

**Figure 154**

## Item Putaway - Client Screens Configuration:



Client Screens Configuration

Screen Name: ITEM PUTAWAY

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| | ☐ | Custom ID | Custom ID | 10 | 80 | CustItm | 5 |
| * | ☑ | GTIN | GTIN | 12 | 80 | GTIN | 6 |
| * | ☑ | Item ID | Item ID | 1 | 80 | ItemID | 1 |
| | ☐ | Line No | Line No | 6 | 80 | | |
| | ☐ | Manf Item ID | Manf Item ID | 7 | 80 | MItmID | 2 |
| * | ☑ | Order Qty | Order Qty | 3 | 80 | | |
| * | ☑ | Putaway Qty | Putaway Qty | 2 | 80 | | |
| * | ☑ | Receive Qty | Receive Qty | 4 | 80 | | |
| * | ☑ | Stor Loc | Stor Loc | 5 | 80 | | |
| * | ☑ | UOM | UOM | 11 | 50 | | |
| | ☐ | UPC ID | UPC ID | 9 | 80 | UPCID | 4 |
| | ☐ | Vend Cat# | Vend Cat | 8 | 80 | VItmID | 3 |

Save

* Mandatory

**Figure 155**

## Pref Items - Client Screens Configuration:

Client Screens Configuration

Screen Name PREF ITEMS

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | [x] | Descr | Descr | 2 | 80 | | |
| * | [x] | Item ID | Item ID | 1 | 80 | | |
| * | [x] | Qty | Qty | 3 | 40 | | |

Save

* Mandatory

**Figure 156**

### Putaway Status - Client Screens Configuration:

Client Screens Configuration

Screen Name PUTAWAY STATUS

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| | [ ] | BUnit | BUnit | 6 | 50 | | |
| | [ ] | Cart ID | Cart ID | 5 | 50 | | |
| * | [x] | Order Date | Order Date | 2 | 80 | | |
| * | [x] | Order No | Order No | 1 | 80 | | |
| * | [x] | Status | Status | 3 | 80 | | |
| * | [x] | UserID | UserID | 4 | 60 | | |
| | [x] | VendorID | VendorID | 7 | 120 | | |

Save

* Mandatory

**Figure 157**

### Rec Consume - Client Screens Configuration:

Client Screens Configuration

Screen Name REC CONSUME

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | [x] | CaseID | CaseID | 1 | 80 | | |
| * | [x] | Dept Id | Dept Id | 5 | 50 | | |
| | [ ] | End Date | End Date | 8 | 80 | | |
| * | [x] | Issue Date | Issue Date | 4 | 80 | | |
| * | [x] | Patient Id | Patient Id | 2 | 80 | | |
| * | [x] | PrefID | PrefID | 2 | 100 | | |
| | [ ] | Start Date | Start Date | 7 | 80 | | |
| * | [x] | Status | Status | 3 | 80 | | |
| | [ ] | Trans Id | Trans Id | 9 | 50 | | |
| * | [x] | User Id | User Id | 6 | 80 | | |

Save

* Mandatory

**Figure 158**

## Return Items - Client Screens Configuration:

Client Screens Configuration

Screen Name: RETURN ITEMS

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| | ☐ | B Unit | B Unit | 11 | 40 | | |
| | ☐ | Comp | Comp | 7 | 50 | | |
| | ☐ | Cust Item No | Cust Item No | 12 | 40 | | |
| | ☐ | Desc | Desc | 9 | 100 | | |
| * | ☑ | Issue Qty | Issue Qty | 2 | 50 | | |
| * | ☑ | Item Id | Item Id | 1 | 80 | | |
| | ☐ | Line No | Line No | 12 | 40 | | |
| * | ☑ | Lot Id | Lot Id | 5 | 40 | | |
| * | ☑ | Ret Qty | Ret Qty | 3 | 50 | | |
| * | ☑ | Ser Id | Ser Id | 4 | 40 | | |
| * | ☑ | Trans Id | Trans Id | 6 | 50 | | |
| * | ☑ | UOM | UOM | 8 | 40 | | |
| | ☐ | Update Date | Update Date | 10 | 80 | | |

Save

* Mandatory

Figure 159

## Returns - Client Screens Configuration:

Client Screens Configuration

Screen Name: RETURNS

Save

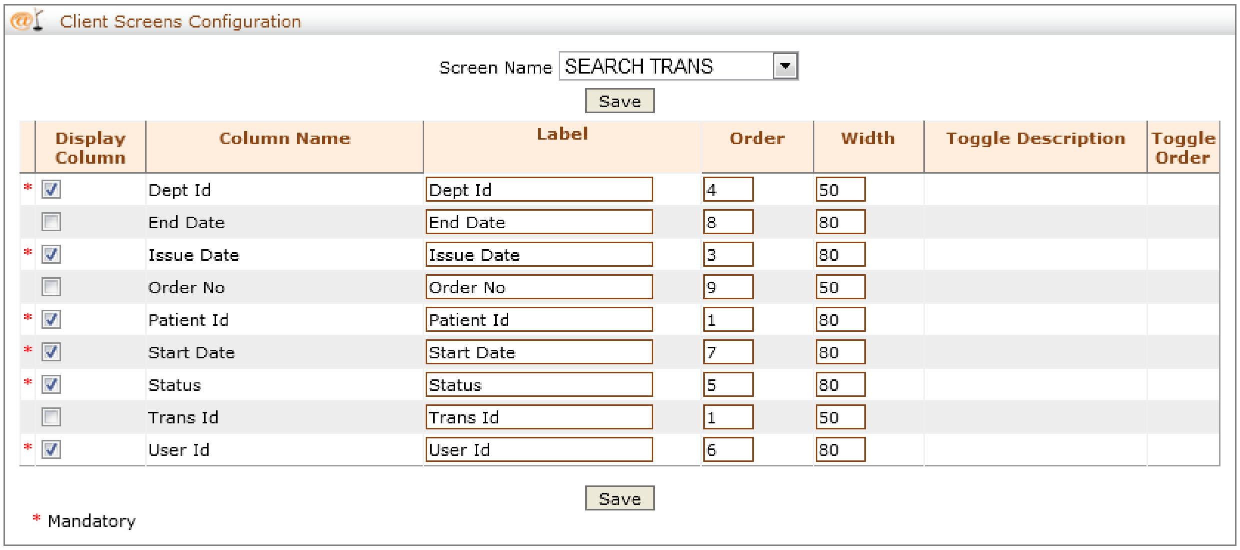
| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Dept Id | Dept Id | 5 | 50 | | |
| | ☐ | End Date | End Date | 8 | 80 | | |
| * | ☑ | Issue Date | Issue Date | 4 | 80 | | |
| * | ☑ | Patient Id | Patient Id | 2 | 80 | | |
| | ☐ | Start Date | Start Date | 7 | 80 | | |
| * | ☑ | Status | Status | 3 | 80 | | |
| | ☐ | Trans Id | Trans Id | 1 | 50 | | |
| * | ☑ | User Id | User Id | 6 | 80 | | |

Save

* Mandatory

Figure 160

## Search Trans - Client Screens Configuration:



Client Screens Configuration

Screen Name SEARCH TRANS

Save

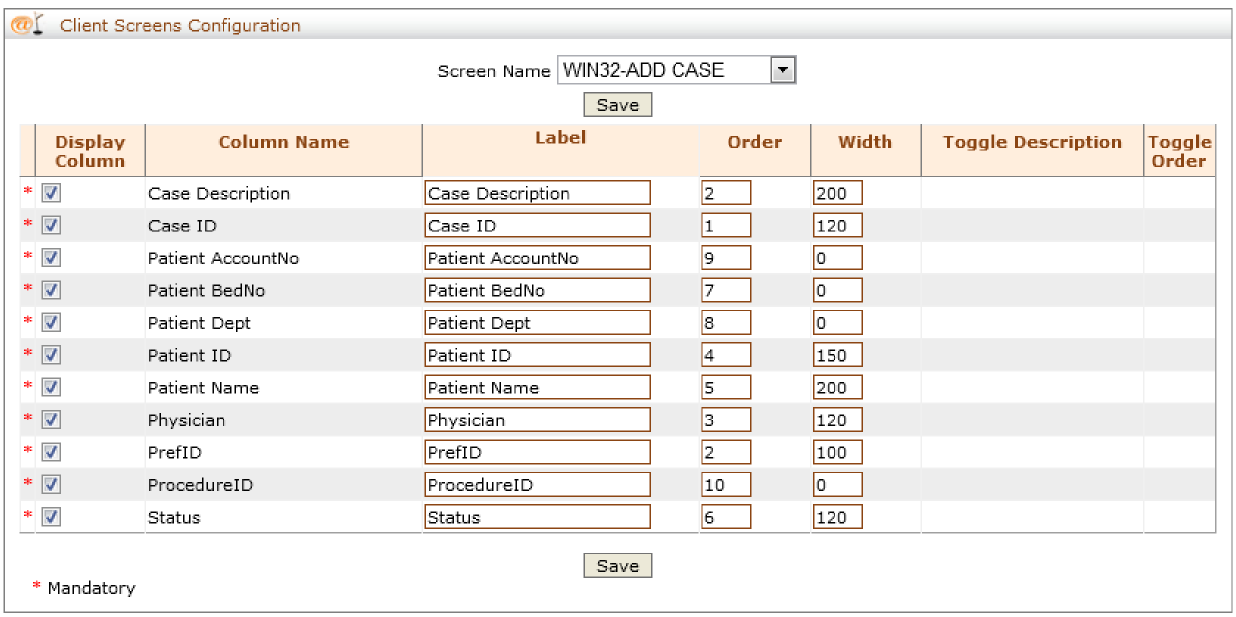
| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Dept Id | Dept Id | 4 | 50 | | |
| | ☐ | End Date | End Date | 8 | 80 | | |
| * | ☑ | Issue Date | Issue Date | 3 | 80 | | |
| | ☐ | Order No | Order No | 9 | 50 | | |
| * | ☑ | Patient Id | Patient Id | 1 | 80 | | |
| * | ☑ | Start Date | Start Date | 7 | 80 | | |
| * | ☑ | Status | Status | 5 | 80 | | |
| | ☐ | Trans Id | Trans Id | 1 | 50 | | |
| * | ☑ | User Id | User Id | 6 | 80 | | |

Save

* Mandatory

**Figure 161**

## Win32 Add Case - Client Screens Configuration:



Client Screens Configuration

Screen Name WIN32-ADD CASE

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Case Description | Case Description | 2 | 200 | | |
| * | ☑ | Case ID | Case ID | 1 | 120 | | |
| * | ☑ | Patient AccountNo | Patient AccountNo | 9 | 0 | | |
| * | ☑ | Patient BedNo | Patient BedNo | 7 | 0 | | |
| * | ☑ | Patient Dept | Patient Dept | 8 | 0 | | |
| * | ☑ | Patient ID | Patient ID | 4 | 150 | | |
| * | ☑ | Patient Name | Patient Name | 5 | 200 | | |
| * | ☑ | Physician | Physician | 3 | 120 | | |
| * | ☑ | PrefID | PrefID | 2 | 100 | | |
| * | ☑ | ProcedureID | ProcedureID | 10 | 0 | | |
| * | ☑ | Status | Status | 6 | 120 | | |

Save

* Mandatory

**Figure 162**

## Win32 Cyct Status - Client Screens Configuration:

Client Screens Configuration

Screen Name WIN32-CYCT STATUS

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | BUnit | BUnit | 3 | 150 | | |
| * | ☑ | Dept Description | Dept Description | 5 | 200 | | |
| * | ☑ | Dept ID | Dept ID | 4 | 150 | | |
| * | ☑ | Inventory Mgmt | Inventory Mgmt | 6 | 0 | | |
| * | ☑ | Par Loc | Par Loc | 1 | 150 | | |
| * | ☑ | Par Loc Descr | Par Loc Descr | 2 | 200 | | |

Save

* Mandatory

Figure 163

## Win32 Location - Client Screens Configuration:

Client Screens Configuration

Screen Name WIN32-LOCATION

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | BUnit | BUnit | 4 | 120 | | |
| * | ☑ | Dept ID | Dept ID | 3 | 120 | | |
| * | ☑ | Inventory Mgmt | Inventory Mgmt | 5 | 0 | | |
| * | ☑ | Par Loc | Par Loc | 1 | 100 | | |
| * | ☑ | Par Loc Descr | Par Loc Descr | 2 | 200 | | |

Save

* Mandatory

Figure 164

## Win32 Patient List - Client Screens Configuration:

Client Screens Configuration

Screen Name WIN32-PATIENT LIST

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Account No | Account No | 5 | 200 | | |
| * | ☑ | Patient BedNo | Patient BedNo | 1 | 150 | | |
| * | ☑ | Patient Dept | Patient Dept | 2 | 200 | | |
| * | ☑ | Patient MRC | Patient MRC | 3 | 200 | | |
| * | ☑ | Patient Name | Patient Name | 4 | 200 | | |

Save

* Mandatory

Figure 165

## Win32 Putaway Orders - Client Screens Configuration:

Client Screens Configuration

Screen Name WIN32-PUTAWAY ORD

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | BUnit | BUnit | 4 | 150 | | |
| * | ☑ | Order Date Time | Order Date Time | 2 | 250 | | |
| * | ☑ | Order ID | Order ID | 1 | 120 | | |
| * | ☑ | Par Loc | Par Loc | 3 | 120 | | |
| * | ☑ | Vendor ID | Vendor ID | 5 | 150 | | |

Save

* Mandatory

Figure 166

**Win32 Record Header - Client Screens Configuration:**

Client Screens Configuration

Screen Name WIN32-RECORD HEADI

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Case Description | Case Description | 2 | 200 | | |
| * | ☑ | Case ID | Case ID | 1 | 0 | | |
| * | ☑ | Dept Name | Dept Name | 5 | 200 | | |
| * | ☑ | Patient ID | Patient ID | 3 | 150 | | |
| * | ☑ | PrefID | PrefID | 2 | 100 | | |
| * | ☑ | Service Date Time | Service Date Time | 4 | 250 | | |
| * | ☑ | Transaction ID | Transaction ID | 8 | 0 | | |
| * | ☑ | User ID | User ID | 6 | 100 | | |
| | ☐ | Workstation Descr | Workstation Descr | 7 | 80 | | |

Save

* Mandatory

Figure 167

**Win32 Return Header - Client Screens Configuration:**

Client Screens Configuration

Screen Name WIN32-RETURN HEADE

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Account No | Account No | 3 | 150 | | |
| * | ☑ | Dept Name | Dept Name | 5 | 150 | | |
| * | ☑ | PatientName / ID | PatientName / ID | 2 | 200 | | |
| * | ☑ | Service Date Time | Service Date Time | 4 | 220 | | |
| * | ☑ | Transaction ID | Transaction ID | 1 | 0 | | |
| * | ☑ | User ID | User ID | 6 | 150 | | |
| | ☐ | WorkStation Descr | WorkStation Descr | 7 | 80 | | |

Save

* Mandatory


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

**Figure 168**


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

# Import Users

The Import Users option is used by organizations to import or load users from LDAP.  LDAP is set up by your IT department and allows the @Par Web/Server to import existing User IDs from the LDAP so that they don't have to be entered manually.

## *To Import users:*

From the **AtPar** menu, ***click*** **Import Users**. The Import Users screen should now appear **Figure 169**.

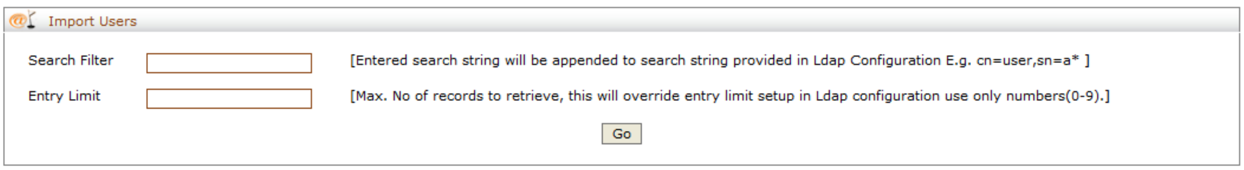



**Figure 169**

**Note:** If LDAP under the Configuration Manager has not been set up, you will receive the following screen: **Figure 170**

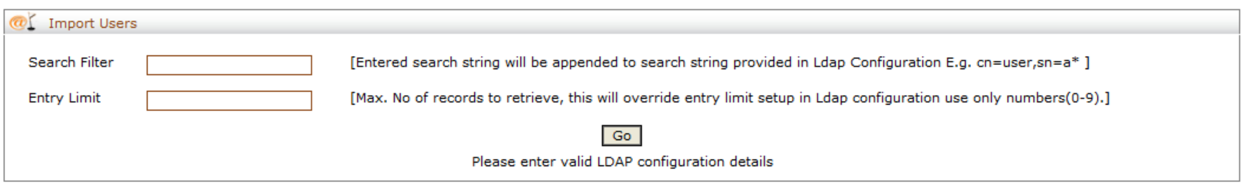



**Figure 170**

1. Enter **Search Filter**. Search Feature corresponds to searching the users based on 2 or more groups. For example: mail, mailAlternateAddress, uid, AccountName, telephoneNumber, fax, cn, sn can be used as search criteria.
2. Enter **Entry Limit**. Entry Limit corresponds to limiting the number of records displayed per view.
3. ***Click*** the  button. The list of users appears. See **Figure 171** below for details.

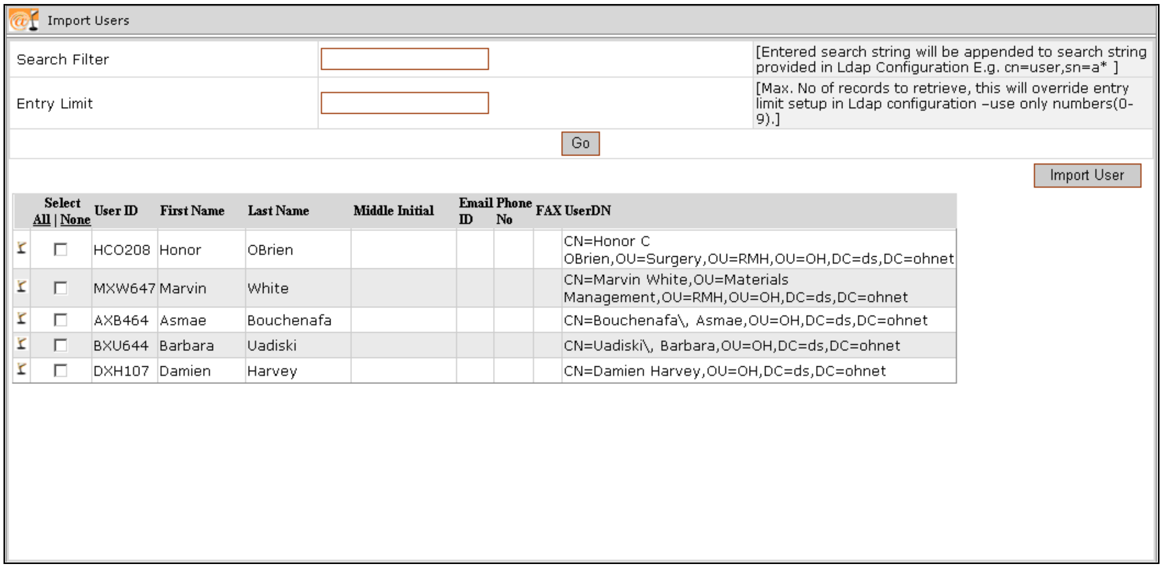



**Figure 171**

4. Check the list of users by clicking on its adjacent check box, and then ***click*** the Import User button. The User(s) Properties view appears. See **Figure 172**

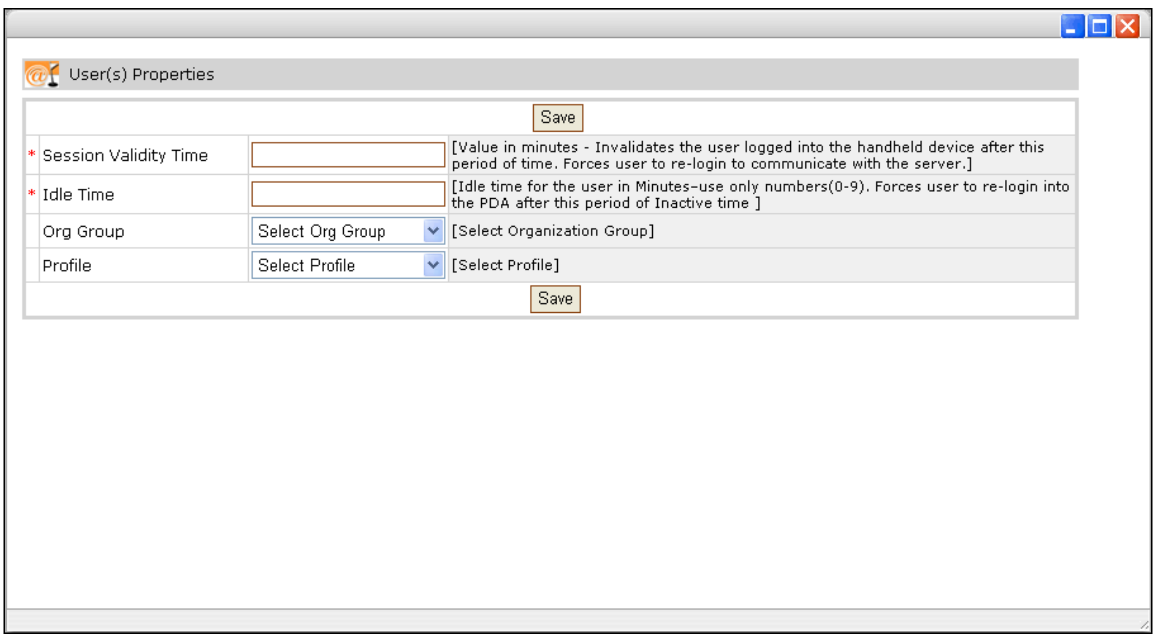



**Figure 172**

5. Enter **Session Validity Time**. This corresponds to forcing the HHT user to re-login after a specific period of time. This time is specified in minutes with maximum length of 4digits.
6. Enter **Idle Time**. This corresponds to forcing the user to re-login to the PDA after a specific period of inactive time.
7. ***Select*** an Org Group from the drop down list.
8. ***Select*** a Profile from the drop down list
9. ***Click*** the Save button. A confirmation message appears as "User (s) imported successfully". See below figure for details. **Figure 173**


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

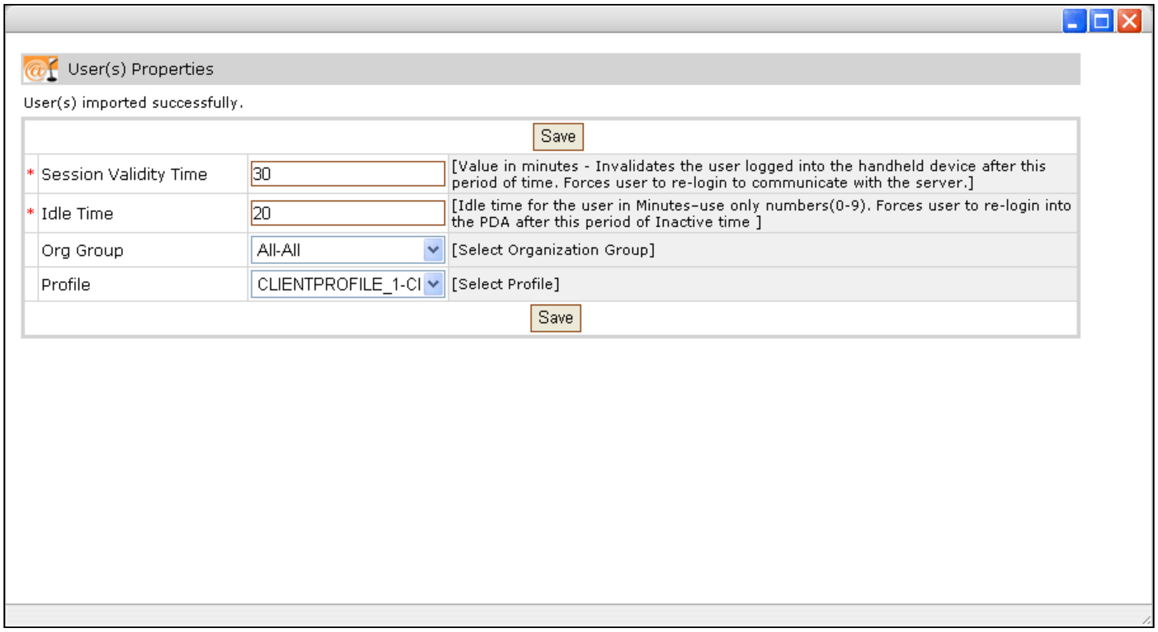

User(s) Properties
User(s) imported successfully.
Save
* Session Validity Time
30
[Value in minutes - Invalidates the user logged into the handheld device after this period of time. Forces user to re-login to communicate with the server.]
* Idle Time
20
[Idle time for the user in Minutes-use only numbers(0-9). Forces user to re-login into the PDA after this period of Inactive time ]
Org Group
All-All
[Select Organization Group]
Profile
CLIENTPROFILE_1-Cl
[Select Profile]
Save

**Figure 173**

# Manage Users

This section allows the @Par Administrator to manage existing users or create new users to the @Par system. Deleting a user will not be allowed, for historical tracking data and reporting purposes. If a user is no longer with the organization nor requires access, the user can be disabled by the @Par Administrator or Supervisor with Administrator rights.

To add or edit a user, ***click*** the **Manage User** link and the following **Figure 174** screen will appear.

Manage Users

Search

Add New User

| | User ID | First Name | Last Name | Middle Initial | Account Status | Org Group ID | Profile ID | Email ID | Phone 1 | FAX |
|---|---|---|---|---|---|---|---|---|---|---|
| | admin | Admin | User | | Active | All | ADMIN | | | |
| | BATCH | BATCH | POU | | Active | All | BATCH_PR | | | |
| | DEBBIE | Debbie | Downer | | Active | SMH | ORNURSE | | | |
| | FRED | Fred | Franks | | Active | SMH | HHT | | | |
| | KSMITH | Kent | Smith | | Active | SMH | WEB | | | |
| | ROY | Roy | Rogers | | Active | SMH | HHT | | | |
| | VENDORMED | Vendor | Med | | Active | SMH | VENDOR | | | |

**Figure 174**

If users have been added they will appear here. All column headers can be sorted to change the order on the display. ***Click*** on the column header name to sort

## *Add a new user*

***Click*** the Add New User button and you will see the following screen **Figure 175**

Add User

Create User | Import User

| | | | |
|---|---|---|---|
| * | User ID | | [Use only letters (a-z), numbers (0-9), the underscore (_), and no spaces] |
| | Password Required | ☐ | [Check here if user is required to use password to access the application on the PDA. This should be checked for Server User] |
| | Password Reset Required | ☐ | [Checking this will force the user to reset the password initially] |
| * | Session Validity Time | | [Value in minutes. Maximum length of 4 digits –use only numbers(1-9). 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 | | [Idle time for the user in Minutes–use only numbers(1-9). Forces user to re-login into the PDA after this period of Inactive time ] |
| * | First Name | | [First name of the user –accepts everything except for < or >] |
| * | Last Name | | [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 | | |
| | Phone 2 | | |
| | FAX | | |
| | Pager | | |
| | Org Group ID | Select Org Group | [Select Organization Group] |
| | Profile | Select Profile | [Select Profile] |

Create User

* Mandatory

**Figure 175**

Enter all required information and other fields as you deem necessary.


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

**Note:** Mandatory fields are denoted with a **red asterisk (*)**. If the new user will be a Web user the "Password required" option **MUST** be checked**.**

**User ID** – Enter a unique ID for the user to use at log in to @Par. In the Edit mode this option will be disabled. **No spaces allowed**.

**Password required** – This is an optional check box. If the @Par Administrator checks the check box the options in **Figure 176** will appear

| | | | |
|---|---|---|---|
| | Password Required | ☑ | [Check here if user is required to use password to access the application on the PDA. This should be checked for Server User] |
| * | Password | | [Password should be between 3 to 8 characters. Complexity of the password is **Any Characters**.] |
| * | ReConfirm Password | | |
| | Password Reset Required | ☐ | [Checking this will force the user to reset the password initially] |

**Figure 176**

**Password reset required –** Select this option for this user and when the user next logs in to the HHT they will have to reset their current password.

**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.

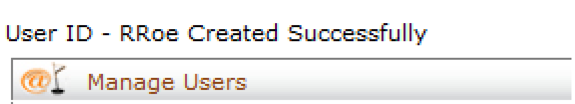
**Fax** - Use the 1234567890 format.

**Pager** - Use the 1234567890 format.

**Org Group –** Using the drop down list, select the Org Group for the user

**Profile -** Using the drop down list, select the Profile for the user.

When finished selecting all parameters ***click*** the [Create User] button and the following message displays at the top of the screen **Figure 177**





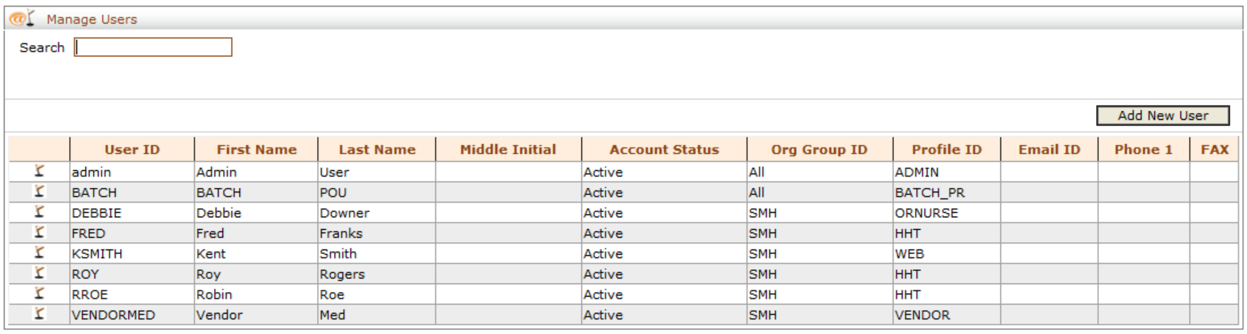
501 Kings Hwy East Fairfield, CT 06825 Phone: (888) 647-4621 Fax: (888) 647-4621

Figure 177

***Click*** the **X**  icon and return to the **Manage Users** main window.

**Note:** You can also add a new user using the Add user link found on the main menu of options under **AtPar**

## *Edit an existing User*



Manage Users

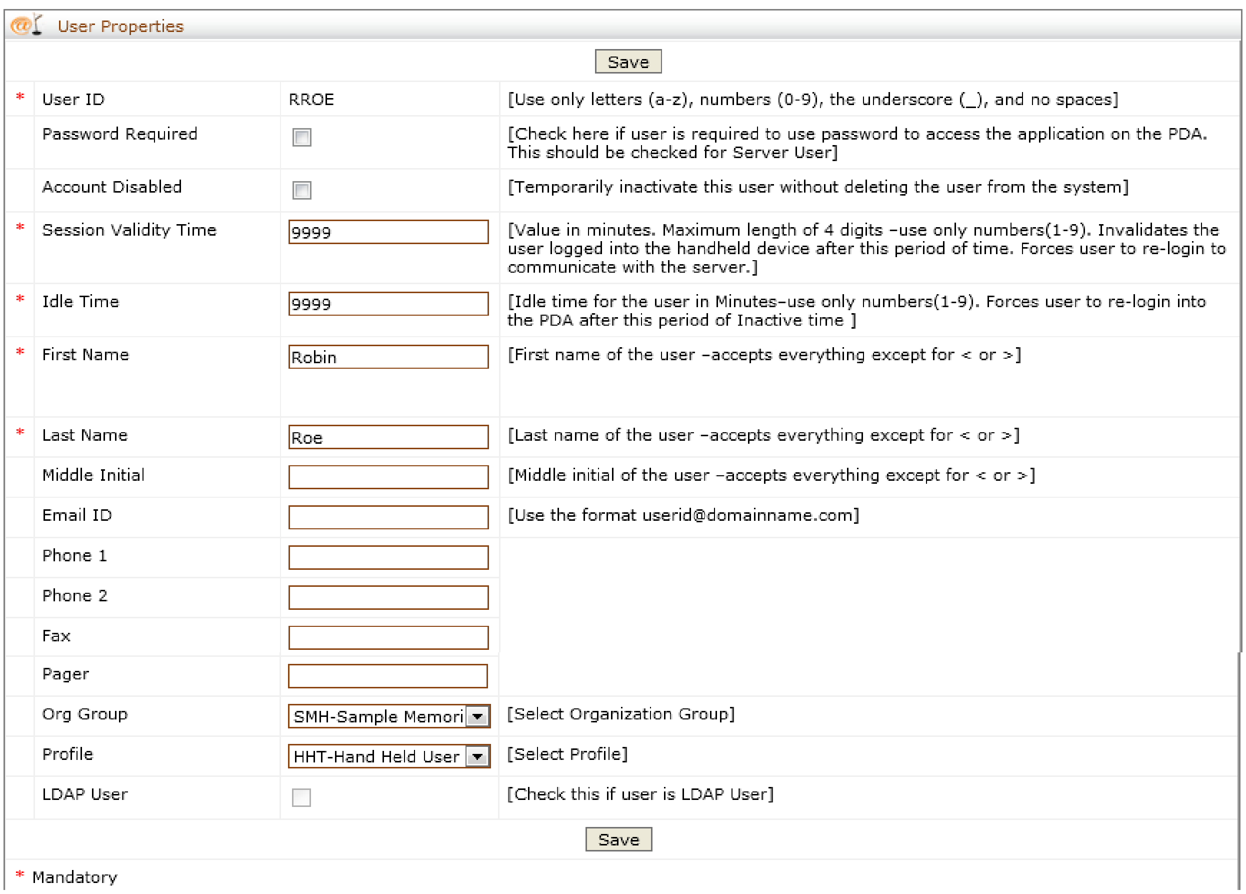
Search

Add New User

| | User ID | First Name | Last Name | Middle Initial | Account Status | Org Group ID | Profile ID | Email ID | Phone 1 | FAX |
|---|---|---|---|---|---|---|---|---|---|---|
| | admin | Admin | User | | Active | All | ADMIN | | | |
| | BATCH | BATCH | POU | | Active | All | BATCH_PR | | | |
| | DEBBIE | Debbie | Downer | | Active | SMH | ORNURSE | | | |
| | FRED | Fred | Franks | | Active | SMH | HHT | | | |
| | KSMITH | Kent | Smith | | Active | SMH | WEB | | | |
| | ROY | Roy | Rogers | | Active | SMH | HHT | | | |
| | RROE | Robin | Roe | | Active | SMH | HHT | | | |
| | VENDORMED | Vendor | Med | | Active | SMH | VENDOR | | | |

Figure 178

***Click*** on user id and the following screen will appear. **Figure 179**



User Properties

Save

| | | | |
|---|---|---|---|
| * | User ID | RROE | [Use only letters (a-z), numbers (0-9), the underscore (_), and no spaces] |
| | Password Required | | [Check here if user is required to use password to access the application on the PDA. This should be checked for Server User] |
| | Account Disabled | | [Temporarily inactivate this user without deleting the user from the system] |
| * | Session Validity Time | 9999 | [Value in minutes. Maximum length of 4 digits –use only numbers(1-9). 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 | 9999 | [Idle time for the user in Minutes–use only numbers(1-9). Forces user to re-login into the PDA after this period of Inactive time ] |
| * | First Name | Robin | [First name of the user –accepts everything except for < or >] |
| * | Last Name | Roe | [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 | | |
| | Phone 2 | | |
| | Fax | | |
| | Pager | | |
| | Org Group | SMH-Sample Memori | [Select Organization Group] |
| | Profile | HHT-Hand Held User | [Select Profile] |
| | LDAP User | | [Check this if user is LDAP User] |

Save

* Mandatory

Figure 179

The following options is added during edit that wasn't in the original creation screen.

**Account disabled –** Check this option to disable a user from logging in to @Par.

**LDAP User –** Check this option if user is in the active directory so in future updates can be done.

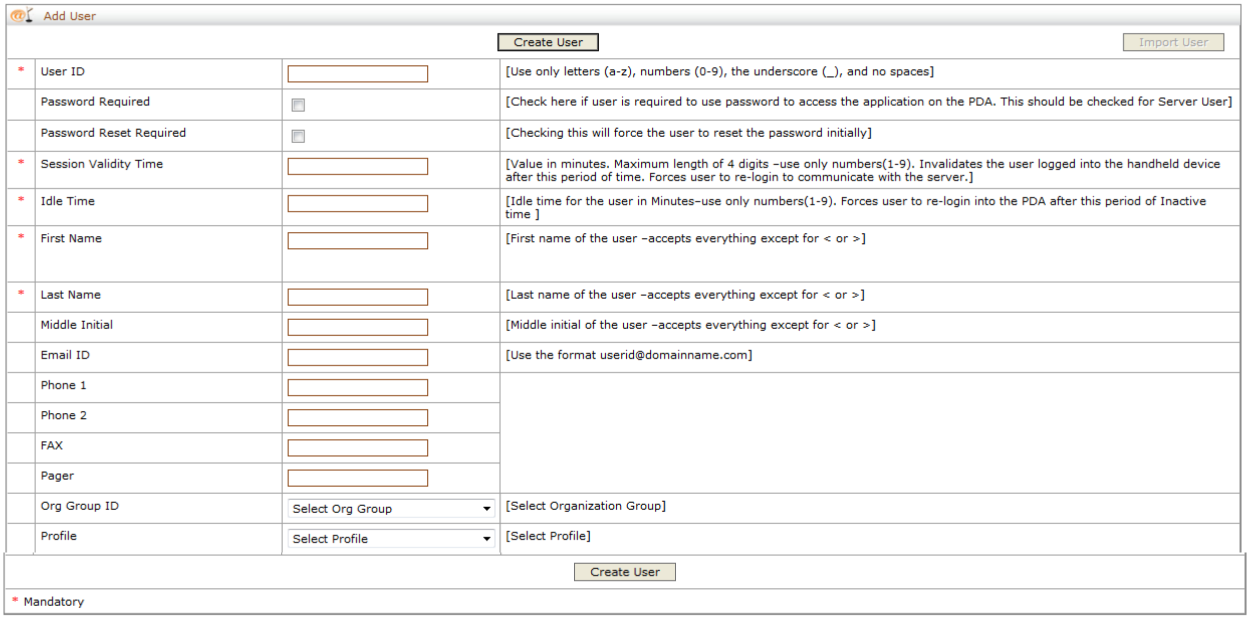
Enter or edit information, change Org Group or Profile, uncheck or check a box, then to save the modifications to the user ***click*** the Save button.

***Click*** the **X** icon and return to the **Manage Users** main window.

**Note:** Import Users view provides an interface to import users from LDAP server. A single user or multiple users may be imported at an instance. After importing, these LDAP users are converted to @Par users. This importing eliminates the creation of same users in @Par.

# Add User

To add a user without using Manage Users function ***click*** the **Add User** link and the following **Figure 180** screen will appear.



Add User

Create User | Import User

| | | | |
|---|---|---|---|
| * | User ID | | [Use only letters (a-z), numbers (0-9), the underscore (_), and no spaces] |
| | Password Required | ☐ | [Check here if user is required to use password to access the application on the PDA. This should be checked for Server User] |
| | Password Reset Required | ☐ | [Checking this will force the user to reset the password initially] |
| * | Session Validity Time | | [Value in minutes. Maximum length of 4 digits –use only numbers(1-9). 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 | | [Idle time for the user in Minutes–use only numbers(1-9). Forces user to re-login into the PDA after this period of Inactive time ] |
| * | First Name | | [First name of the user –accepts everything except for < or >] |
| * | Last Name | | [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 | | |
| | Phone 2 | | |
| | FAX | | |
| | Pager | | |
| | Org Group ID | Select Org Group | [Select Organization Group] |
| | Profile | Select Profile | [Select Profile] |

Create User

* Mandatory

**Figure 180**

Use the same process in the aforementioned Manage Users option.

Deleting a user will not be allowed, for historical tracking data and reporting purposes. If a user is no longer with the organization nor requires access, the user can be disabled by the @Par Administrator or Supervisor with Administrator rights.


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

# Define User Groups

This section will assign users to groups based on the Org Group setup. HHT Users or Group Members can be assigned to Web users. The Web users will then be able to review all reports for their assigned HHT Users/Group Members as well as set any product or profile parameters for users assigned to their group.

**Note: Only Web users should be assigned this option. Web user MUST be logged in to the @Par Web pages under their log in and NOT under Admin.**

Login as a Web user that has the @Par Web checkbox enabled in **Manage Org Groups**.

***Click*** the **Define Groups** link and the following screen should appear **Figure 181**


**Figure 181**

***Click*** the Go button and the Define Groups main screen appears **Figure 182**.

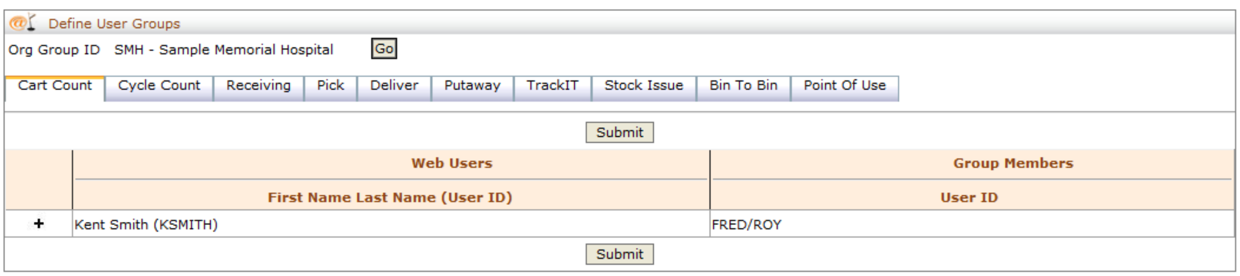



**Figure 182**

To assign a Group member to a Web User first ensure that you are under the correct product.

***Click*** on the respective product tab. When the correct product tab has been selected ***click*** the **+** sign next to a Web User. See **Figure 183**

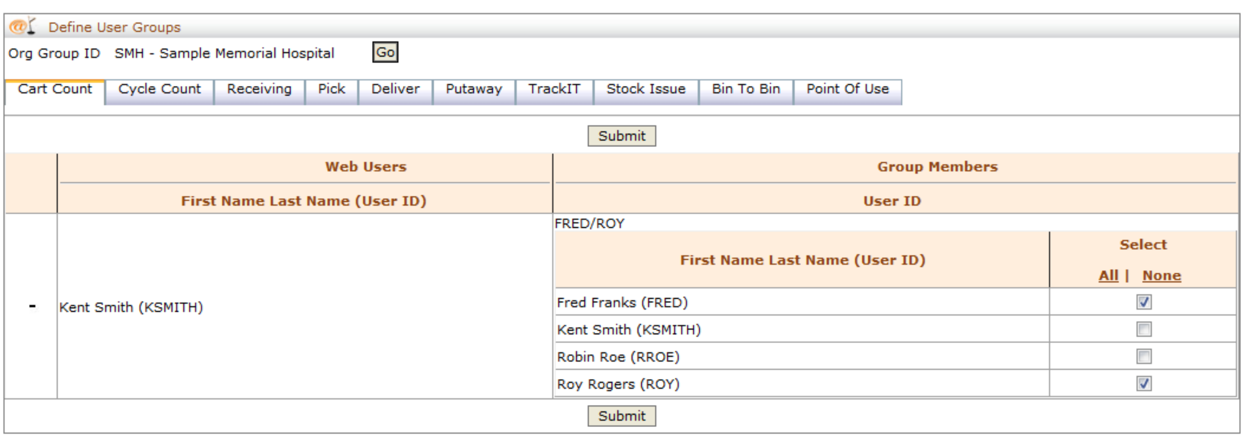



**Figure 183**

The screen expands for the Web User, allowing selections of group members now.

***Click*** on **All** will place a check mark in the check box of each user listed.
***Click*** on **None** will remove any check marks already displayed
***Click*** in individual box to assign members one at a time

After selecting all Group Members ***click*** on the Submit button, and the following message will appear **Figure 184**.

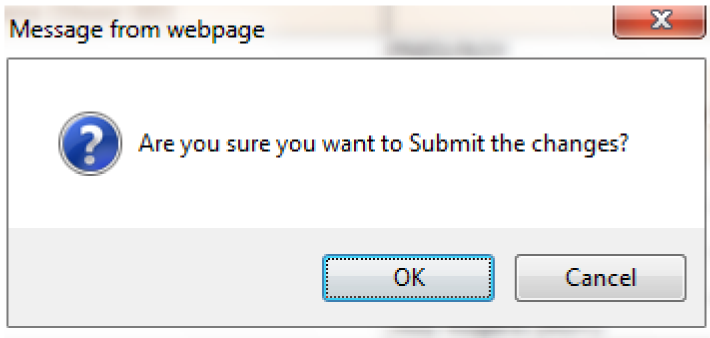
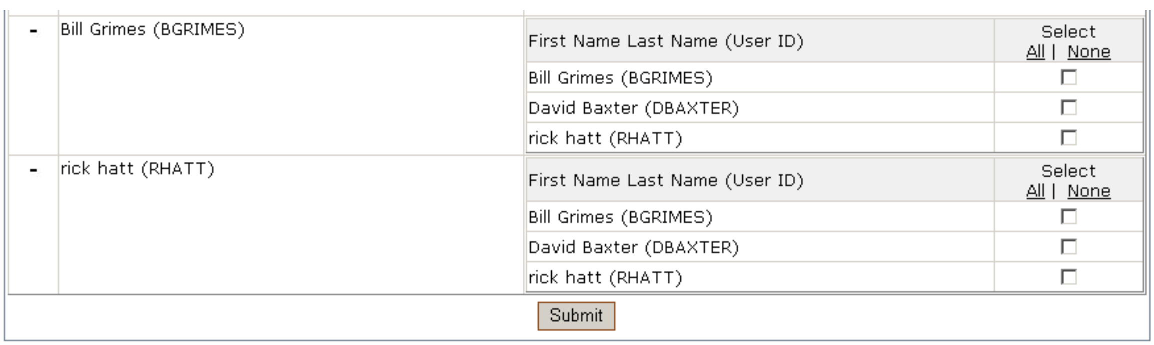



**Figure 184**

***Click*** the OK button to accept the change or the Cancel button to return without saving the changes.

To select multiple Web Users to set up Group Members ***click*** the **+** button by each Web User to setup and the following screen appears **Figure 185**



| | | First Name Last Name (User ID) | Select All \| None |
|---|---|---|---|
| - | Bill Grimes (BGRIMES) | Bill Grimes (BGRIMES) | ☐ |
| | | David Baxter (DBAXTER) | ☐ |
| | | rick hatt (RHATT) | ☐ |
| - | rick hatt (RHATT) | First Name Last Name (User ID) | Select All \| None |
| | | Bill Grimes (BGRIMES) | ☐ |
| | | David Baxter (DBAXTER) | ☐ |
| | | rick hatt (RHATT) | ☐ |

Submit

**Figure 185**

After selection of Group Member to the Web users follow the same process to submit the changes.

## Assign Profiles

Profiles can be assigned while creating or editing a user, but only a user at a time. **Assign Profiles** option can assign profiles to multiple users at the same time.

***Click*** the **Assign Profiles** link and the following screen appears **Figure 186**


**Figure 186**

***Select*** an **Org Group** and **Profile** to setup from the drop down list.

**User ID**, **Name**, **Ldap Role**, and **Organization** are all search fields. If you want to narrow your search enter any or all of the fields.

***Click*** the Go button and **Figure 187** will appear.

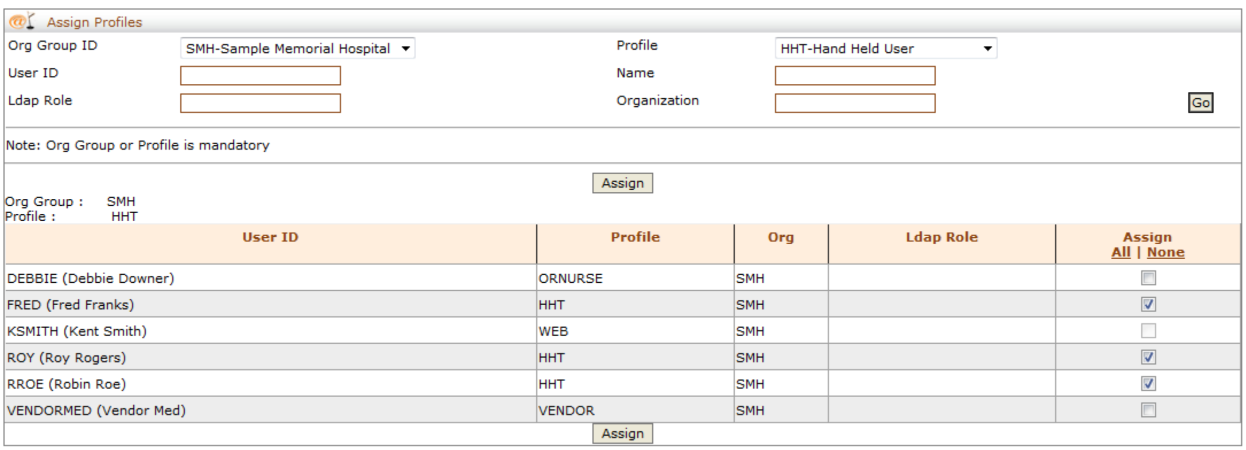



**Figure 187**

All users assigned to the profile will display.

**Note:** Any user that is in the selected Org Group ID but **NOT** in the Profile will have the check box for profile assignment disabled.

- ***Click*** on **All** to check all users.
- ***Click*** on **None** to remove all existing users or,
- ***Click*** in each check box for each user to assign.

When all users have been selected, ***click*** the ASSIGN button and return to the **Assign Profiles** main screen **Figure 188**


**Figure 188**

The “Updated Successfully” message should appear at the top of the screen.

## Audit Setup

The **Audit Setup** is used to select Product menu functions to track. When audit setup for a product has been checked, the changes to the product will be tracked.

For example, setting up Assign Profiles from @Par to be audited will show any modifications, deletions, and additions done in the future. If a new user is added, assignment is unchecked, etc. this information will be recorded.

***Click*** the **Audit Setup** link and the screen in **Figure 189** appears


**Figure 189**

Using the drop down list (**Figure 190**), select a product to setup for an audit trail

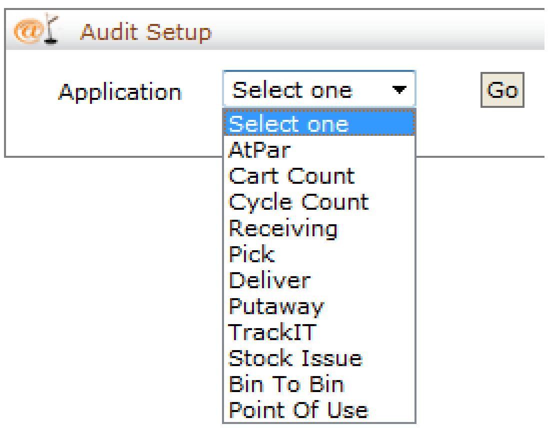
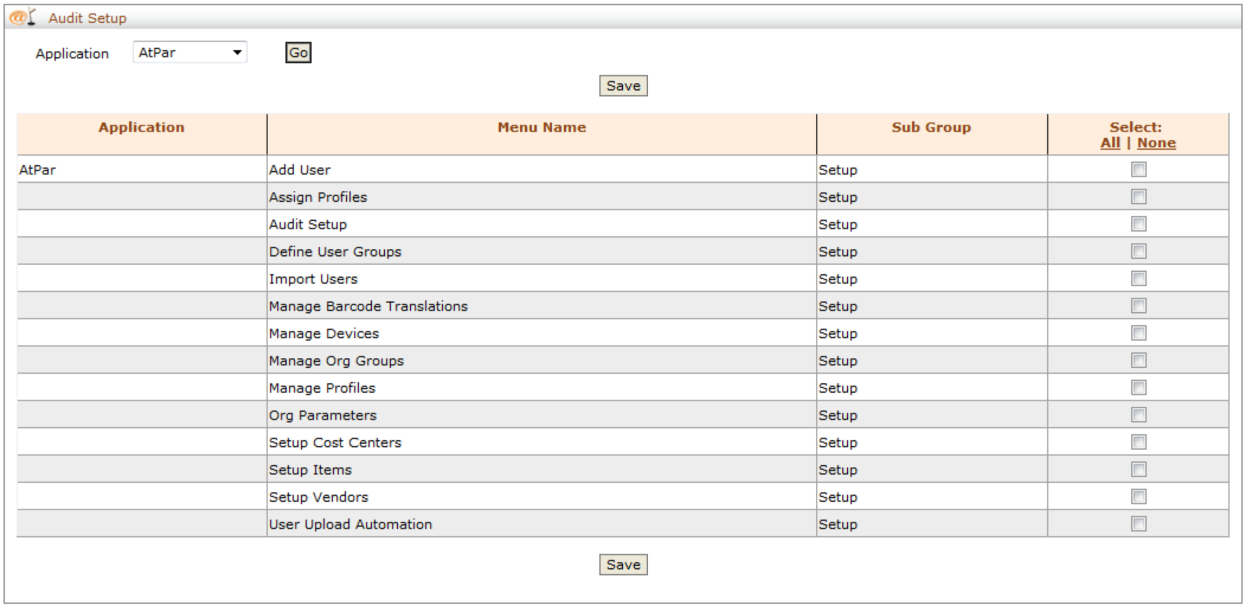



**Figure 190**

***Highlight*** Atpar and ***click*** the  button **Figure 191**



Audit Setup

Application AtPar Go

Save

| Application | Menu Name | Sub Group | Select: All \| None |
|---|---|---|---|
| AtPar | Add User | Setup | |
| | Assign Profiles | Setup | |
| | Audit Setup | Setup | |
| | Define User Groups | Setup | |
| | Import Users | Setup | |
| | Manage Barcode Translations | Setup | |
| | Manage Devices | Setup | |
| | Manage Org Groups | Setup | |
| | Manage Profiles | Setup | |
| | Org Parameters | Setup | |
| | Setup Cost Centers | Setup | |
| | Setup Items | Setup | |
| | Setup Vendors | Setup | |
| | User Upload Automation | Setup | |

Save

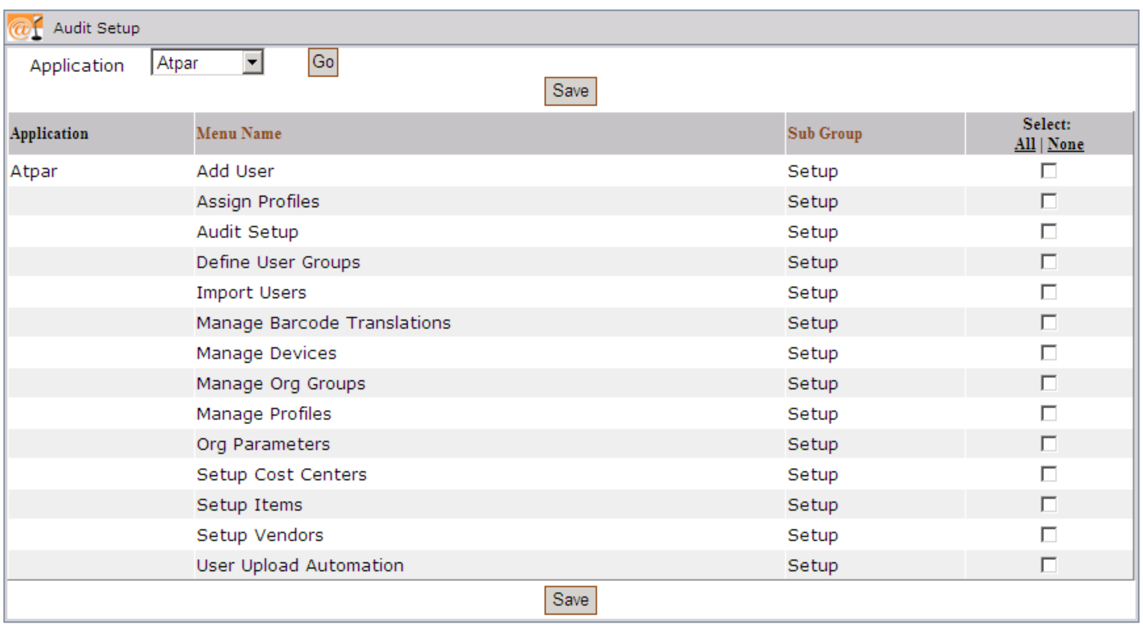
**Figure 191**

***Click*** on **All** to place a check mark in all check boxes,

***Click*** on **None** to clear all check boxes, or ***Click*** each checkbox individually you wish to track.

When all selections have been done, ***click*** the Save button.

**Note:** Par Management will offer the following options to track **Figure 192**



Audit Setup

Application Atpar Go

Save

| Application | Menu Name | Sub Group | Select: All \| None |
|---|---|---|---|
| Atpar | Add User | Setup | |
| | Assign Profiles | Setup | |
| | Audit Setup | Setup | |
| | Define User Groups | Setup | |
| | Import Users | Setup | |
| | Manage Barcode Translations | Setup | |
| | Manage Devices | Setup | |
| | Manage Org Groups | Setup | |
| | Manage Profiles | Setup | |
| | Org Parameters | Setup | |
| | Setup Cost Centers | Setup | |
| | Setup Items | Setup | |
| | Setup Vendors | Setup | |
| | User Upload Automation | Setup | |

Save

**Figure 192**

Cart Count

Audit Setup

Application: Cart Count [Go]

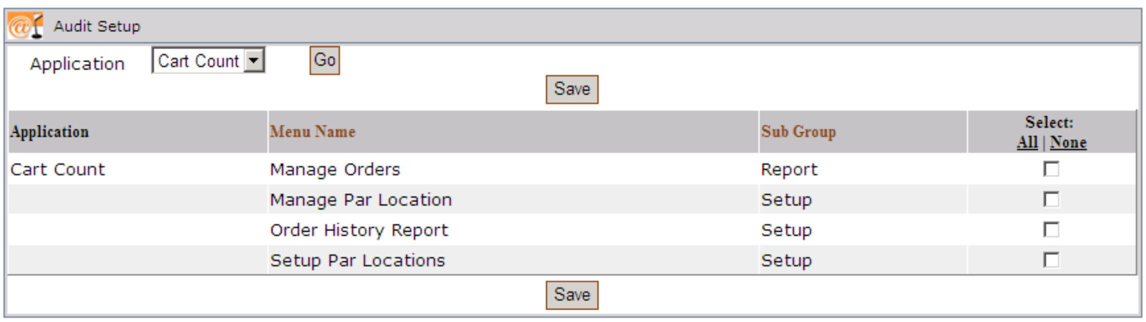
[Save]

| Application | Menu Name | Sub Group | Select: All \| None |
|---|---|---|---|
| Cart Count | Order History Report | Setup | ☐ |

[Save]

**Figure 193**

Par Mgmt Cart Count



Audit Setup

Application: Cart Count [Go]

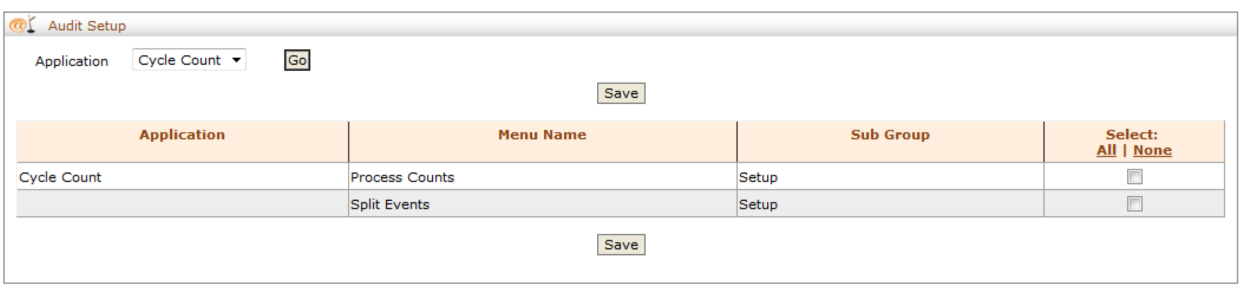
[Save]

| Application | Menu Name | Sub Group | Select: All \| None |
|---|---|---|---|
| Cart Count | Manage Orders | Report | ☐ |
| | Manage Par Location | Setup | ☐ |
| | Order History Report | Setup | ☐ |
| | Setup Par Locations | Setup | ☐ |

[Save]

**Figure 194**

Cycle Count



Audit Setup

Application: Cycle Count [Go]

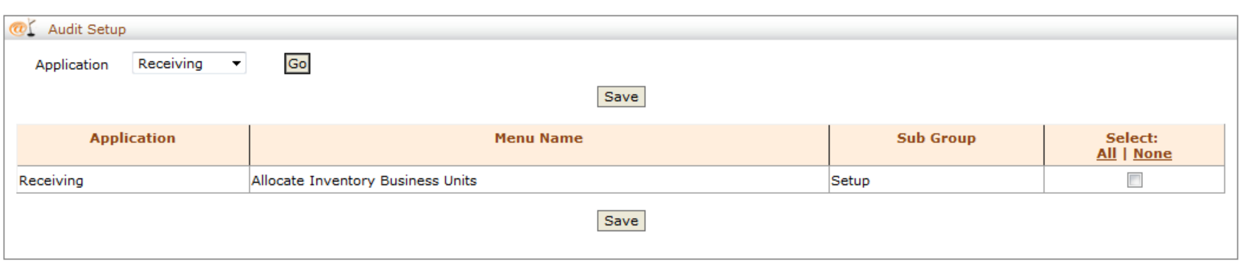
[Save]

| Application | Menu Name | Sub Group | Select: All \| None |
|---|---|---|---|
| Cycle Count | Process Counts | Setup | ☐ |
| | Split Events | Setup | ☐ |

[Save]

**Figure 195**

Receiving and Par Management Receiving



Audit Setup

Application: Receiving [Go]

[Save]

| Application | Menu Name | Sub Group | Select: All \| None |
|---|---|---|---|
| Receiving | Allocate Inventory Business Units | Setup | ☐ |

[Save]

**Figure 196**

Pick and Par Management Pick


**Figure 197**

Deliver and Par Management Deliver

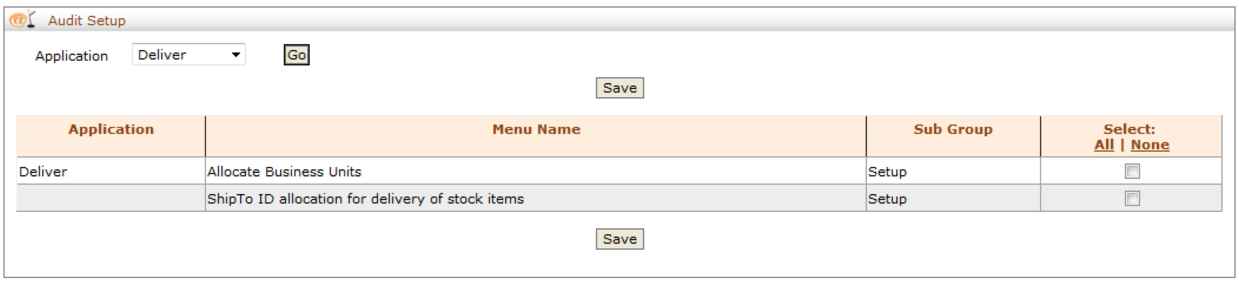



**Figure 198**

Putaway


**Figure 199**

Stock Issue

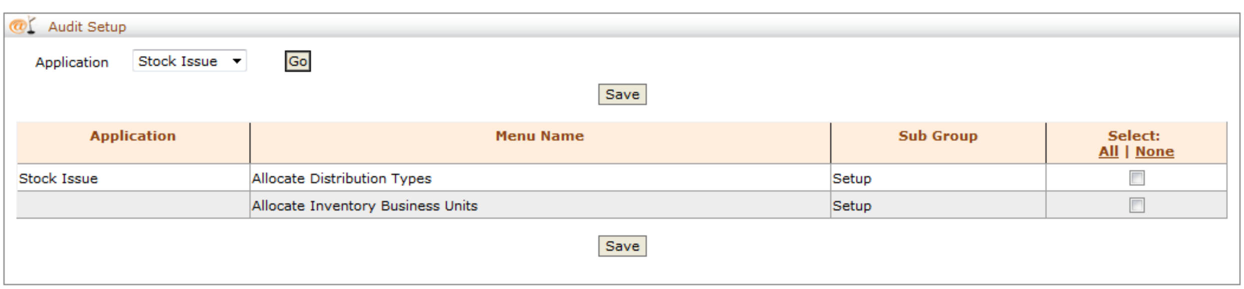



**Figure 200**

Bin To Bin


Audit Setup

Application Bin To Bin Go

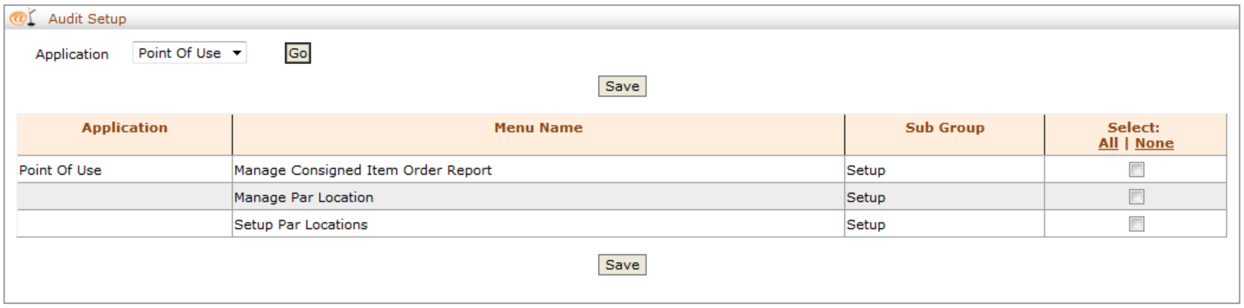
Save

| Application | Menu Name | Sub Group | Select: All \| None |
|---|---|---|---|
| Bin To Bin | Allocate Inventory Business Units | Setup | |

Save

**Figure 201**

Point of Use


Audit Setup

Application Point Of Use Go

Save

| Application | Menu Name | Sub Group | Select: All \| None |
|---|---|---|---|
| Point Of Use | Manage Consigned Item Order Report | Setup | |
| | Manage Par Location | Setup | |
| | Setup Par Locations | Setup | |

Save

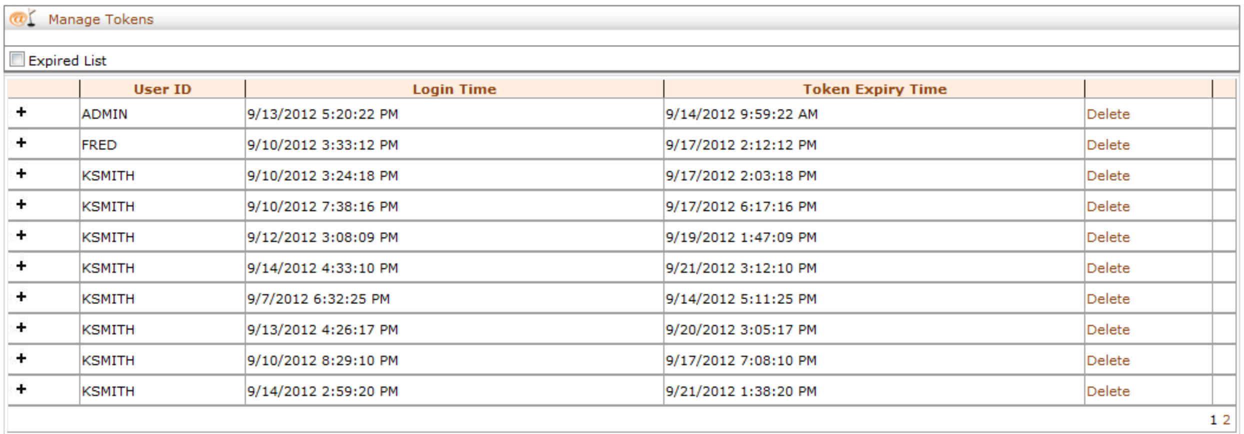
**Figure 202**


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

## Manage Tokens

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 handheld device) to the administrator.

***Click*** on the **Manage Tokens** link and screen in **Figure 203** will appear



Manage Tokens

Expired List

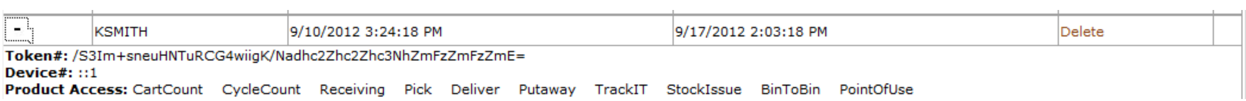
| | User ID | Login Time | Token Expiry Time | | |
|---|---|---|---|---|---|
| + | ADMIN | 9/13/2012 5:20:22 PM | 9/14/2012 9:59:22 AM | Delete | |
| + | FRED | 9/10/2012 3:33:12 PM | 9/17/2012 2:12:12 PM | Delete | |
| + | KSMITH | 9/10/2012 3:24:18 PM | 9/17/2012 2:03:18 PM | Delete | |
| + | KSMITH | 9/10/2012 7:38:16 PM | 9/17/2012 6:17:16 PM | Delete | |
| + | KSMITH | 9/12/2012 3:08:09 PM | 9/19/2012 1:47:09 PM | Delete | |
| + | KSMITH | 9/14/2012 4:33:10 PM | 9/21/2012 3:12:10 PM | Delete | |
| + | KSMITH | 9/7/2012 6:32:25 PM | 9/14/2012 5:11:25 PM | Delete | |
| + | KSMITH | 9/13/2012 4:26:17 PM | 9/20/2012 3:05:17 PM | Delete | |
| + | KSMITH | 9/10/2012 8:29:10 PM | 9/17/2012 7:08:10 PM | Delete | |
| + | KSMITH | 9/14/2012 2:59:20 PM | 9/21/2012 1:38:20 PM | Delete | |

1 2

**Figure 203**

This will provide the administrator with User ID, Login Time, Token Expiry time, and a link to "Delete".

***Clicking*** on the **+** will open up the selected Token for more technical information. Please see the screen below: **Figure 204**



| | | | | | |
|---|---|---|---|---|---|
| - | KSMITH | 9/10/2012 3:24:18 PM | 9/17/2012 2:03:18 PM | Delete | |

**Token#:** /S3Im+sneuHNTuRCG4wiigK/Nadhc2Zhc2Zhc3NhZmFzZmFzZmE=
**Device#:** ::1
**Product Access:** CartCount CycleCount Receiving Pick Deliver Putaway TrackIT StockIssue BinToBin PointOfUse

**Figure 204**

***Click*** the Delete Expired Tokens button to delete any expired tokens.


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

## Org Parameters

If the **Org Parameters** are not set up in the Product Parameter screen as in **Manage Org Groups → Assign Parameters** section, they can be set up here.

***Click*** the **Org Parameters** link and the following screen appears **Figure 205**

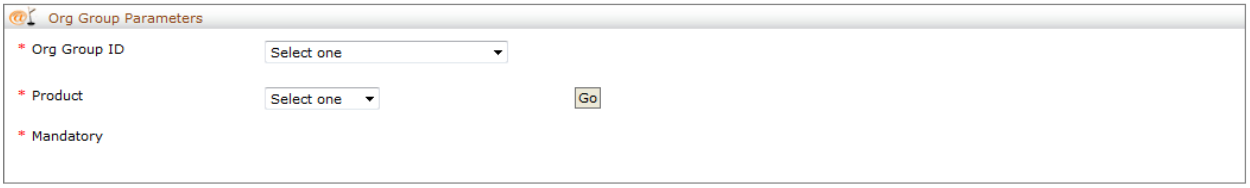
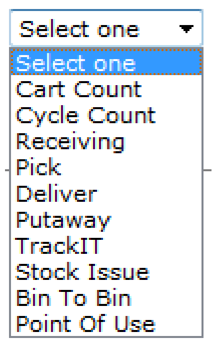



**Figure 205**

***Select*** an Org Group ID from the drop down list.

Product drop down list




***Select*** a **Product** and the same Product parameter options will be available as in **Manage Org Group → Assign Parameters.**

Please refer to the Manage Org Groups section found previously in this this document.

# Manage Devices

If an organization requires tracking HHT devices, they will use this menu option.

**NOTE:** The "Allow registered devices only" option found in Security Configuration **MUST** be enabled as shown in **Figure 206** to allow this option to function correctly.

| | | |
|---|---|---|
| Allow registered devices only | ☑ | [Checking this will force the users to setup Device] |

**Figure 206**

***Click*** on the **Manage Devices** link and you will see the following **Figure 207**

Manage Devices

| | Device ID | Description | MAC Address | Status | Change Status |
|---|---|---|---|---|---|
| | | | | | |

**Figure 207**

**Device ID –** Unique ID found on the HHT

**Description –** Description of the device (MC70, etc)

**MAC Address –** Unique MAC Address found on the HHT

**Status –** After an HHT device has been added, the Active status will appear

**Change Status –** After an HHT device has been added, the InActivate status will appear

Enter the information and ***click*** the button and **Figure 208** will appear

Manage Devices

| | Device ID | Description | MAC Address | Status | Change Status |
|---|---|---|---|---|---|
| | 05896766688 | MC75 | 80-00-E8-00-00-00 | Active | InActivate |
| | | | | | |

**Figure 208**

If a device has been added, the button will appear which allows edit of an existing device.

If you wish to inactivate an existing device, ***click*** on the **Inactivate** link under the Change Status column.

***Click*** the button and the following screen displays **Figure 209**

Manage Devices

| | Device ID | Description | MAC Address | Status | Change Status |
|---|---|---|---|---|---|
| | 05896766688 | MC75 | 80-00-E8-00-00-00 | Active | InActivate |
| | | | | | |

**Figure 209**

**NOTE:** The only fields available for edit are Description and MAC Address. If you need to change the Device ID you must first delete the existing item and then enter as new.

To save after editing ***click*** the button

To change the status of an existing device, ***click*** the button and the following message appears **Figure 210**

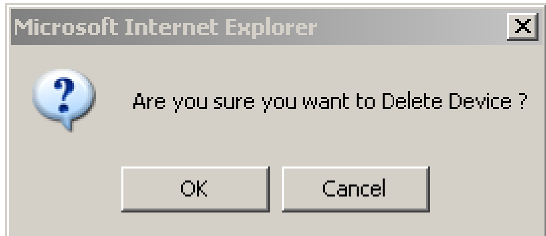



**Figure 210**

***Click*** the OK button to change the status of the device or ***Click*** the Cancel button to return without changing the status of the device.

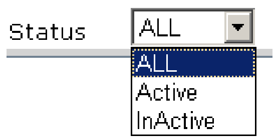
To keep historical reporting records, deleting an HHT is not allowed.  Only status change is allowed.

# User Status Report

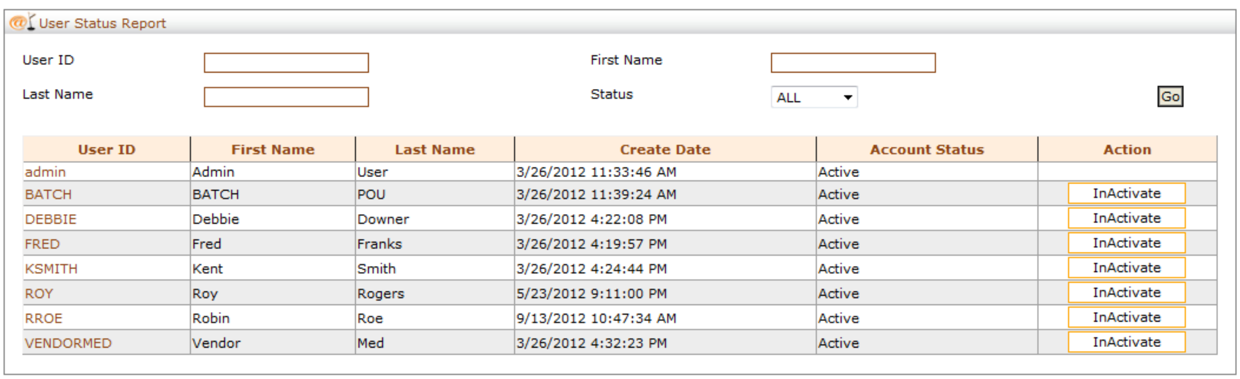
This option has been added to view active and inactive users. When you select this option, the following screen will display: **Figure 211**


**Figure 211**

Search options are User ID, First Name, Last Name and, using the drop down Status option, Active and Inactive




***Highlight*** a status and ***click*** the  button. The User Status Report will appear. **Figure 212**




| User ID | First Name | Last Name | Create Date | Account Status | Action |
|---|---|---|---|---|---|
| admin | Admin | User | 3/26/2012 11:33:46 AM | Active | |
| BATCH | BATCH | POU | 3/26/2012 11:39:24 AM | Active | InActivate |
| DEBBIE | Debbie | Downer | 3/26/2012 4:22:08 PM | Active | InActivate |
| FRED | Fred | Franks | 3/26/2012 4:19:57 PM | Active | InActivate |
| KSMITH | Kent | Smith | 3/26/2012 4:24:44 PM | Active | InActivate |
| ROY | Roy | Rogers | 5/23/2012 9:11:00 PM | Active | InActivate |
| RROE | Robin | Roe | 9/13/2012 10:47:34 AM | Active | InActivate |
| VENDORMED | Vendor | Med | 3/26/2012 4:32:23 PM | Active | InActivate |

**Figure 212**

**User ID – @Par** User ID used for login.

**First Name –** User's first name

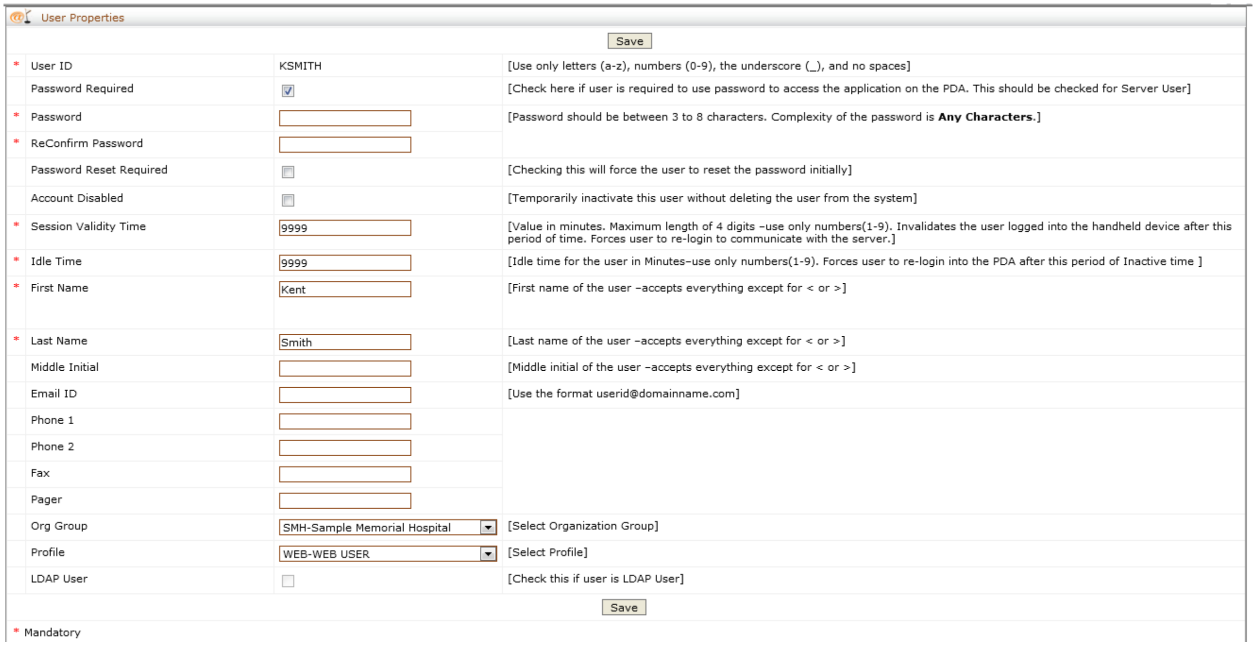
**Last Name –** User's last name

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

**Account Status –** User's status, either Active or Inactive.

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

***Clicking*** on a **User ID** gives next screen **Figure 213*.***



User Properties

Save

| | | | |
|---|---|---|---|
| * | User ID | KSMITH | [Use only letters (a-z), numbers (0-9), the underscore (_), and no spaces] |
| | Password Required | ☑ | [Check here if user is required to use password to access the application on the PDA. This should be checked for Server User] |
| * | Password | | [Password should be between 3 to 8 characters. Complexity of the password is **Any Characters**.] |
| * | ReConfirm 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 | 9999 | [Value in minutes. Maximum length of 4 digits –use only numbers(1-9). 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 | 9999 | [Idle time for the user in Minutes–use only numbers(1-9). Forces user to re-login into the PDA after this period of Inactive time ] |
| * | First Name | Kent | [First name of the user –accepts everything except for < or >] |
| * | Last Name | Smith | [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 | | |
| | Phone 2 | | |
| | Fax | | |
| | Pager | | |
| | Org Group | SMH-Sample Memorial Hospital | [Select Organization Group] |
| | Profile | WEB-WEB USER | [Select Profile] |
| | LDAP User | ☐ | [Check this if user is LDAP User] |

Save

* Mandatory

**Figure 213**

This is same screen you receive from the **Manage User** option.


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

# Error Report

The **Error Report** screen allows the @Par Administrator to run error logs with a “From” date and a “To date”. It will also allow downloading of these reports to Notepad so they can be printed or emailed and sent to **@Par Support** for analysis.

***Click*** on the Go button to receive the next screen: **Figure 214**

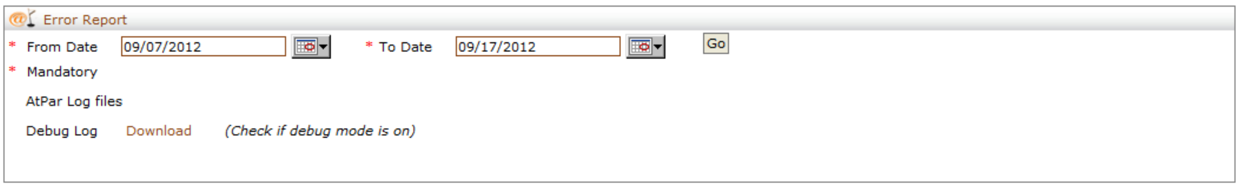
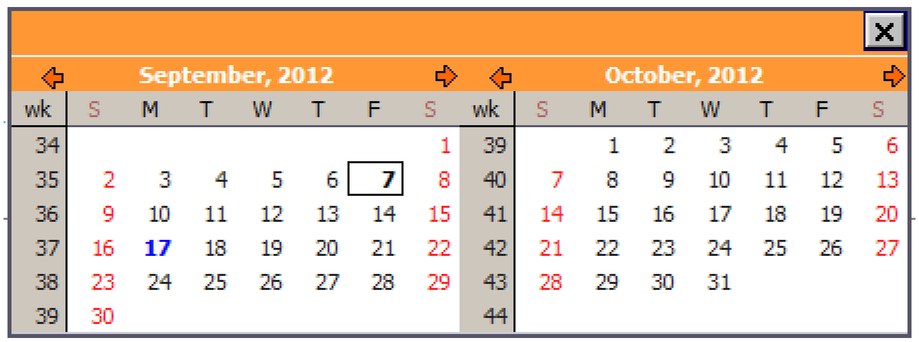



**Figure 214**

Manually enter the From Date and To Dates or use the icon to select date from calendar.




**Note:** The Calendar will default to the display date that is already filled in the field. To select a new date simply click on the date you want in the calendar and it is automatically displayed in the field.

If you receive the following message you will need to adjust the TO DATE **Figure 215**


**Figure 215**

**Click** the Go button and see the error report below **Figure 216**


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

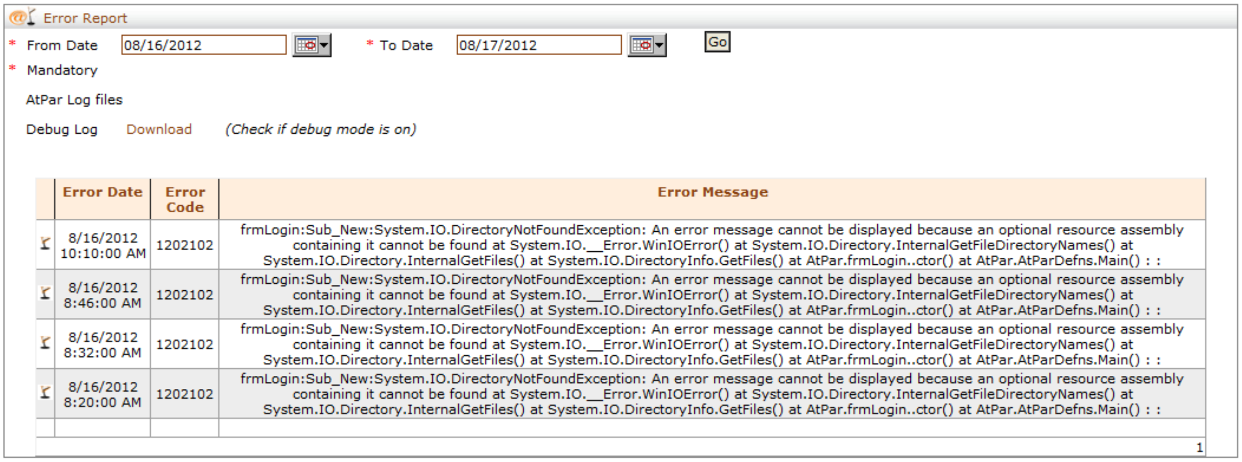



**Figure 216**

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, Log Configuration is checked: **Figure 217**

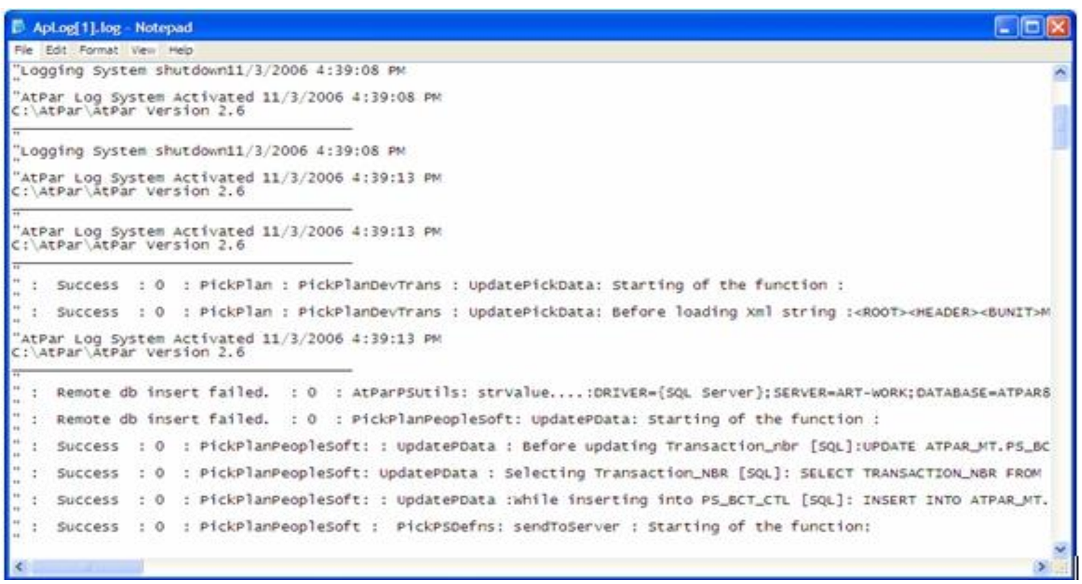



**Figure 217**

## Change Password

The **Change Password** link is used to change the Administrators password. The Administrator's User ID can't be changed, only the password.

***Click*** on the **Change Password** link and you will receive the screen in **Figure 218**

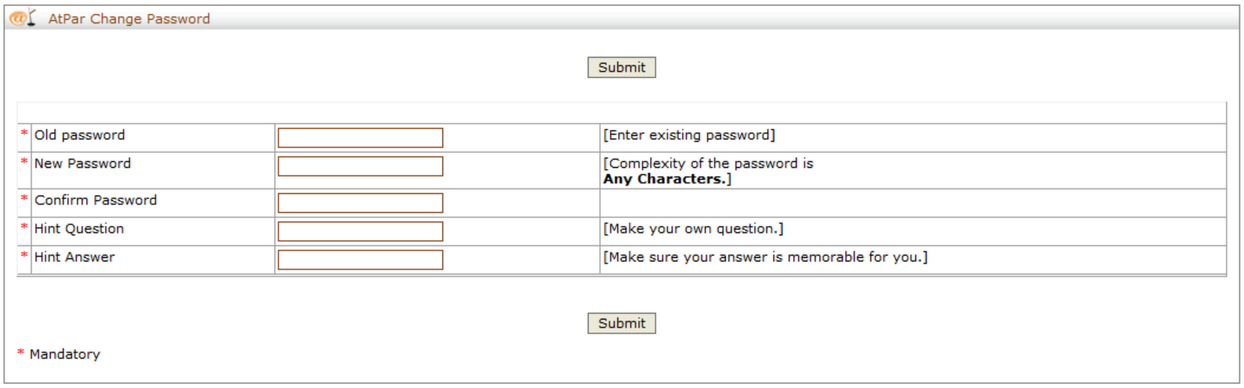



**Figure 218**

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

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

In the **Confirm Password** field, ***Type*** in the **identical** password you did in the **New Password** field.

***Click*** the 

button and you have changed the password.

# USER UPLOAD AUTOMATION

This option will allow the loading of users into a profile and Org Group. Please call @Par Support prior to using this option.

***Click*** the **User Upload Automation** link and receive the following screen **Figure 219**

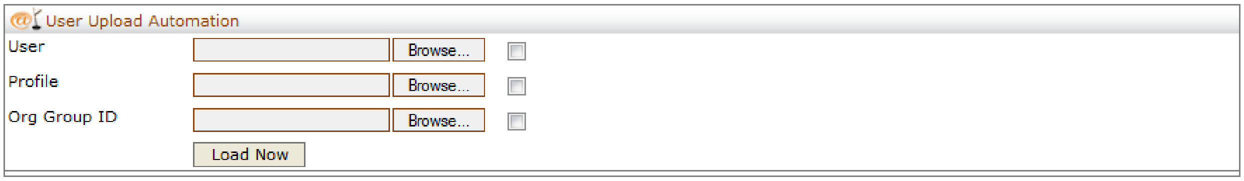



**Figure 219**

1. Enter the User or File to upload. 

2. Click the button to select a file.
3. Click the check box.

1. Enter the Profile to load the user into
2. Click the check box

1. Enter the Org Group to load the user into
2. Click the Check Box

When all information is ready, ***click*** the 

button.

If the 

button is selected prior to check box and file being defined, following message will appear **Figure 220**

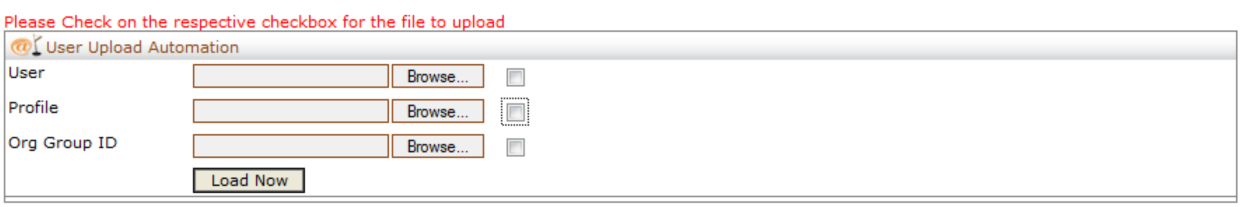



**Figure 220**


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

# SETUP LOCATION GROUPS

This option will allow organizations to set up predefined locations within a unique group id. This will allow an administrator the ability to easily allocation the locations to users more efficiently than allocating a location one at a time.

**Note:** The locations are “Deliver to Locations”.

This allows efficient control on what is downloaded to each user’s HHT.

When the following parameter (**Figure 221**) is checked in Org Group Parameter – WEB/SERVER user **must** create **Location Groups** and allocate the location groups created to users in the PICK and/or DELIVER products

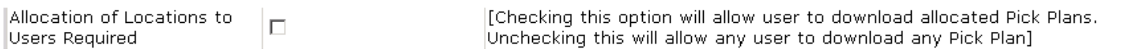



**Figure 221**

***Click*** the **Setup Location Groups** link and the following screen will appear **Figure 222**

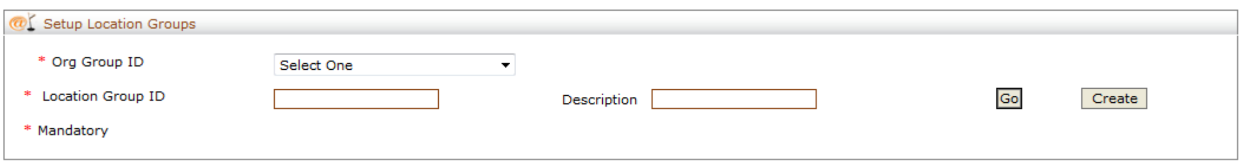



**Figure 222**

### Add New Location Group

***Select*** an Org Group ID from the drop down list

In the Location Group ID field from **Figure 222**, enter a Unique Location Group ID, Description, and then ***click*** the Create button. This will bring up the following screen **Figure 223**

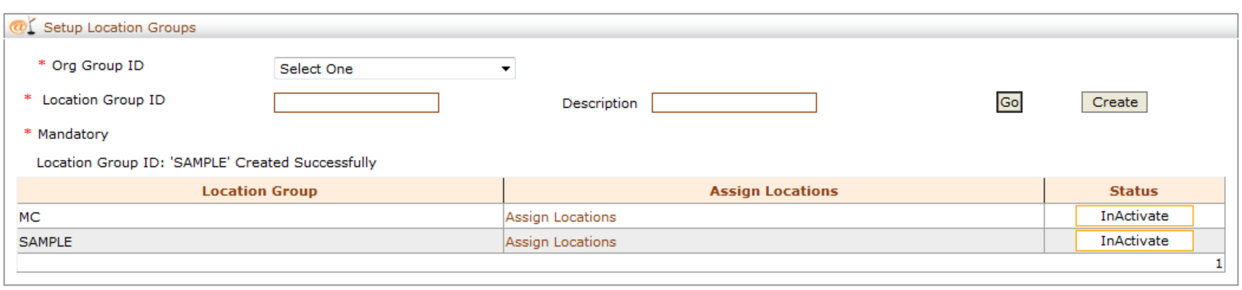



**Figure 223**

If the Org Group ID is not selected before selecting the Create button, the following screen and message will appear in **Figure 224**

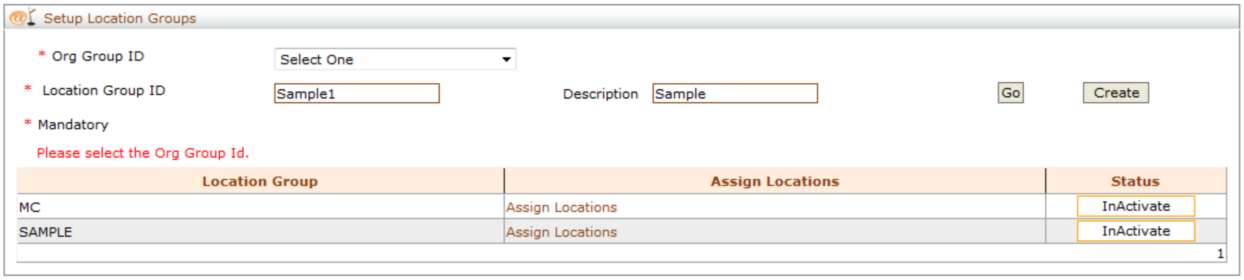



**Figure 224**

In addition, if the Create button is selected without a unique Location Group ID, the following message will appear **Figure 225**

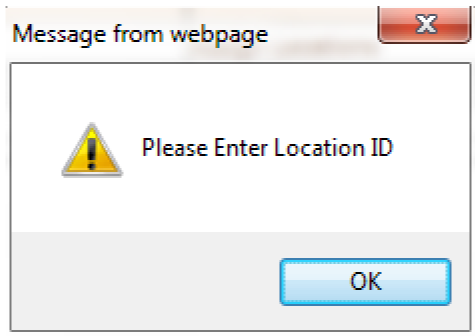



**Figure 225**

### Add locations to a Location Group

Once a new Location Group has been created the next step is to assign locations to the new Location Group. ***Click*** the Assign Locations link to add a location or multiple locations to this group***.*** **Figure 226**

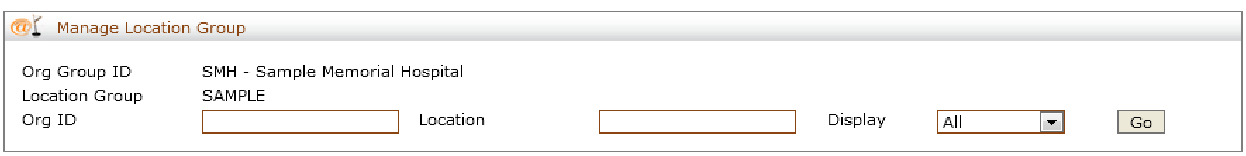
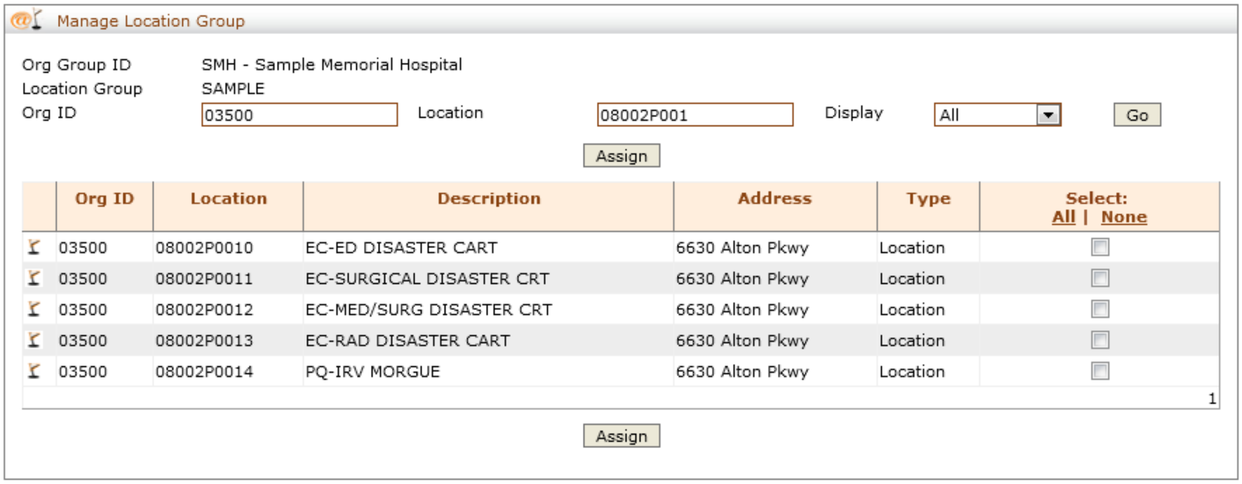



**Figure 226**

If the Go button is selected without entering anything, all locations in the ERP system will be returned. Some organizations have over 5,000 locations. To help cut down the amount of locations to assign it is recommended that a valid Ord ID and location is entered. Partial location search is available as well.

Once information is ready, ***click*** the Go button and the following screen will appear **Figure 227**



Manage Location Group

Org Group ID SMH - Sample Memorial Hospital
Location Group SAMPLE
Org ID 03500 Location 08002P001 Display All Go

Assign

| | Org ID | Location | Description | Address | Type | Select: All \| None |
|---|---|---|---|---|---|---|
| | 03500 | 08002P0010 | EC-ED DISASTER CART | 6630 Alton Pkwy | Location | |
| | 03500 | 08002P0011 | EC-SURGICAL DISASTER CRT | 6630 Alton Pkwy | Location | |
| | 03500 | 08002P0012 | EC-MED/SURG DISASTER CRT | 6630 Alton Pkwy | Location | |
| | 03500 | 08002P0013 | EC-RAD DISASTER CART | 6630 Alton Pkwy | Location | |
| | 03500 | 08002P0014 | PQ-IRV MORGUE | 6630 Alton Pkwy | Location | |

1

Assign

**Figure 227**

***Click*** the check box of each and every location to assign to this group and when ready.

To put a check mark in all ***click*** the **All** option and to remove all check marks from the location group click the **None** option.

***Click*** the Assign button to save it.

# Manage Barcode Translations

To support the Pharmacy's requirement to locate items to transact on the handheld device by National Drug Code (NDC), a table (MT_ATPAR_BARCODE_SYMBOLOGY) was developed to store values used to translate a scanned barcode into the NDC.

A page will need to be developed to allow an end user to maintain the data in this table within the AtPar application.

By default, sort order will be by SYMBOLOGY_TYPE then BARCODE_LENGTH

***Click*** the **Manage Barcode Translations** link and the following screen appears **Figure 228**


Manage Barcode Translations

| | Symbology Type | Barcode Length | Description | Start Position | OutPut Length | Updated By | Updated Date |
|---|---|---|---|---|---|---|---|
| | | | | | | | |

1

**Figure 228**

Enter the required data and ***click*** the button to save the information **Figure 229**


Manage Barcode Translations

NDC-Symbology Type added successfully

| | Symbology Type | Barcode Length | Description | Start Position | OutPut Length | Updated By | Updated Date |
|---|---|---|---|---|---|---|---|
| | NDC | 155 | Wide NDC Label | 1 | 155 | ADMIN | 09/17/2012 |
| | | | | | | | |

**Figure 229**

Use the button to edit.

Use the button to delete the translation.

# Setup Vendors

This option is available for organization without an ERP MMIS or using the @Par POU software. Vendors must be created prior to using the software.

***Select*** the **Setup Vendors** option from the **AtPar** menu option and you will receive the following screen: **Figure 230**

Setup Vendors

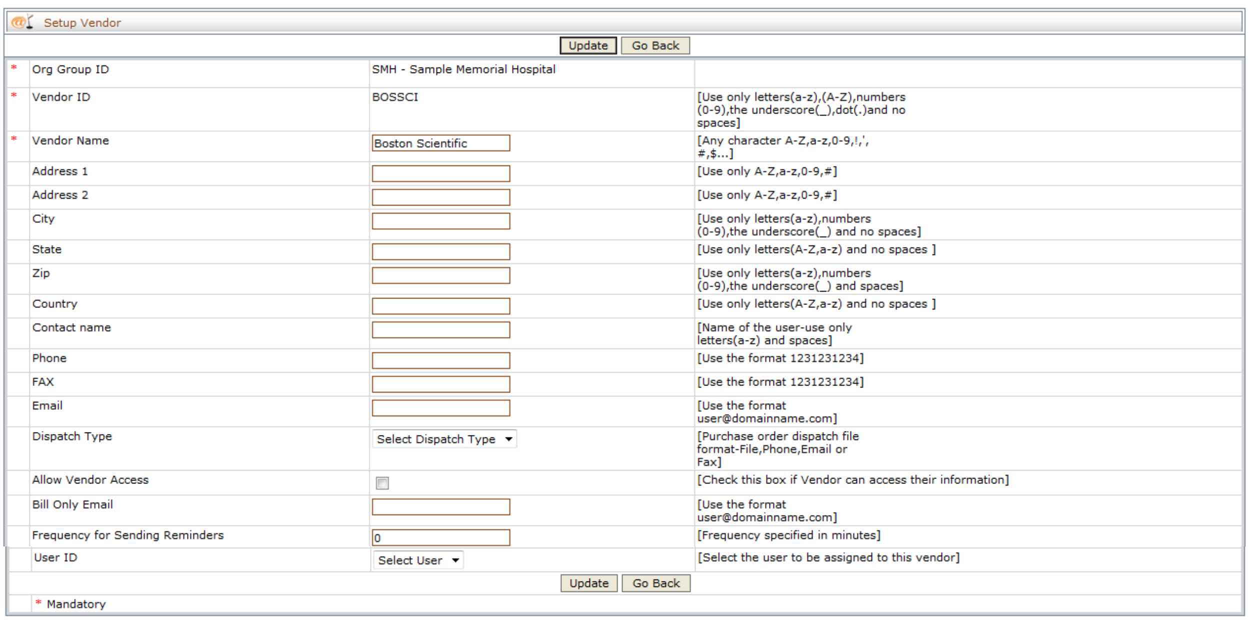
Add Vendor

| Org Group ID | Vendor ID | Vendor Name | Phone | Dispatch Type | Current Status | Action |
|---|---|---|---|---|---|---|
| SMH | BOSSCI | Boston Scientific | | | Active | InActivate |
| SMH | MED | Medtronics | | | Active | InActivate |

1

**Figure 230**

In this example, you can see that there are multiple vendors already set up. If the vendor you need to edit is already set up, ***click*** the highlighted Vendor ID. **Figure 231**



Setup Vendor

Update Go Back

| | | | |
|---|---|---|---|
| * | Org Group ID | SMH - Sample Memorial Hospital | |
| * | Vendor ID | BOSSCI | [Use only letters(a-z),(A-Z),numbers (0-9),the underscore(_),dot(.)and no spaces] |
| * | Vendor Name | Boston Scientific | [Any character A-Z,a-z,0-9,!,',#,$...] |
| | Address 1 | | [Use only A-Z,a-z,0-9,#] |
| | Address 2 | | [Use only A-Z,a-z,0-9,#] |
| | City | | [Use only letters(a-z),numbers (0-9),the underscore(_) and no spaces] |
| | State | | [Use only letters(A-Z,a-z) and no spaces ] |
| | Zip | | [Use only letters(a-z),numbers (0-9),the underscore(_) and spaces] |
| | Country | | [Use only letters(A-Z,a-z) and no spaces ] |
| | Contact name | | [Name of the user-use only letters(a-z) and spaces] |
| | 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] |
| | Allow Vendor Access | | [Check this box if Vendor can access their information] |
| | Bill Only Email | | [Use the format user@domainname.com] |
| | Frequency for Sending Reminders | 0 | [Frequency specified in minutes] |
| | User ID | Select User | [Select the user to be assigned to this vendor] |

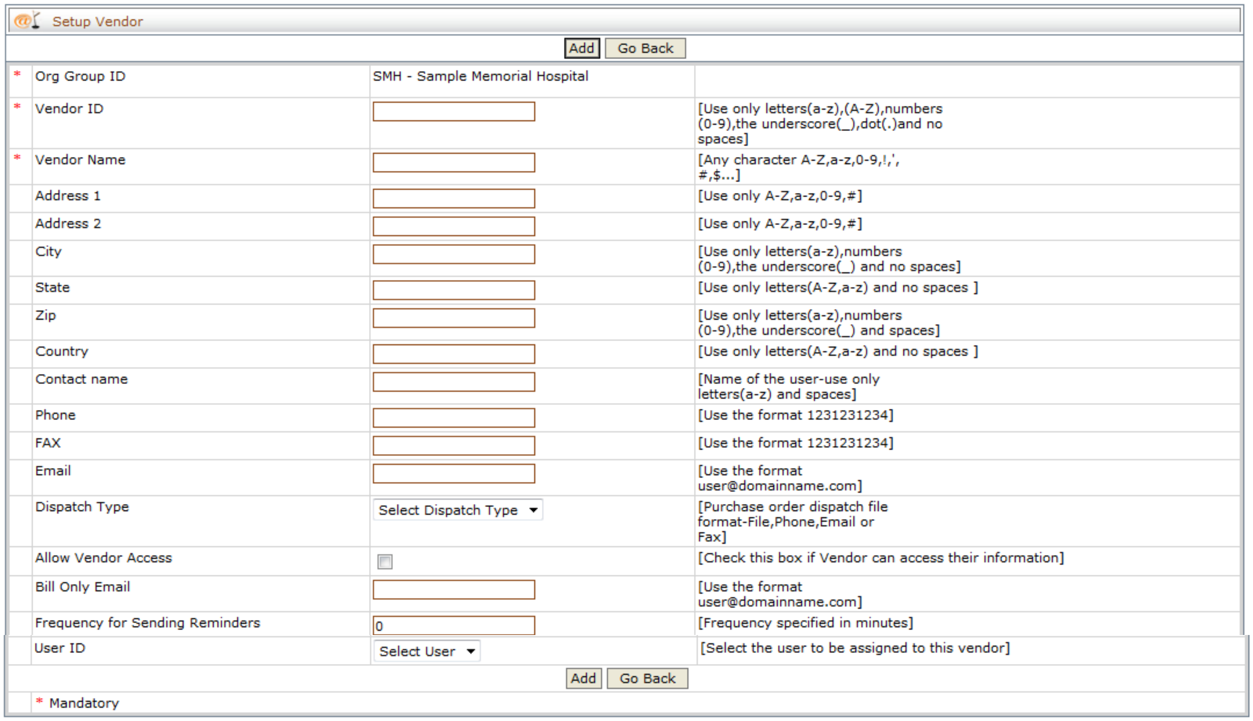
Update Go Back

* Mandatory

**Figure 231**

Make any necessary changes and ***click*** the Update button to save, or the Go Back button to return without saving any changes.

If the Vendor you wish to set up doesn't appear on this list ***click*** on the Add Vendor button. You now see the following screen: **Figure 232**



Setup Vendor

Add | Go Back

| | | | |
|---|---|---|---|
| * | Org Group ID | SMH - Sample Memorial Hospital | |
| * | Vendor ID | | [Use only letters(a-z),(A-Z),numbers (0-9),the underscore(_),dot(.)and no spaces] |
| * | Vendor Name | | [Any character A-Z,a-z,0-9,!,', #,$...] |
| | Address 1 | | [Use only A-Z,a-z,0-9,#] |
| | Address 2 | | [Use only A-Z,a-z,0-9,#] |
| | City | | [Use only letters(a-z),numbers (0-9),the underscore(_) and no spaces] |
| | State | | [Use only letters(A-Z,a-z) and no spaces ] |
| | Zip | | [Use only letters(a-z),numbers (0-9),the underscore(_) and spaces] |
| | Country | | [Use only letters(A-Z,a-z) and no spaces ] |
| | Contact name | | [Name of the user-use only letters(a-z) and spaces] |
| | 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] |
| | Allow Vendor Access | | [Check this box if Vendor can access their information] |
| | Bill Only Email | | [Use the format user@domainname.com] |
| | Frequency for Sending Reminders | 0 | [Frequency specified in minutes] |
| | User ID | Select User | [Select the user to be assigned to this vendor] |

Add | Go Back

* Mandatory

**Figure 232**

**Mandatory fields are noted with an asterisk (*).**

**Org Group ID –** Org Group ID for the vendor

**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.

**Allow Vendor Access –** Check this option to allow users to access On Hand Report and Manage Consigned Item Report

**Bill Only email –** Enter either a distribution type email address or a single user email address for notification on Bill Only items

**Frequency for sending reminders –** Enter numeric value in minutes that reminders are sent to the noted email address – if 0 is enter reminders will not be sent

**User ID –** Select the user from the drop down list that is assigned to this Vendor

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

***Click*** the Go Back button to return 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.

## Setup Items

After all Org IDs/Business units have been set up by the **@Par Administrator**, the next step in setting up items for organizations with no ERP MMIS system or using @Par POU/**Par Management** is to create Items.

***Select*** the **Setup Items** option from the **AtPar** menu option and you will receive the following screen: **Figure 233**


**Figure 233**

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.

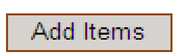
**UPC ID –** Enter the Item's UPC ID.

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

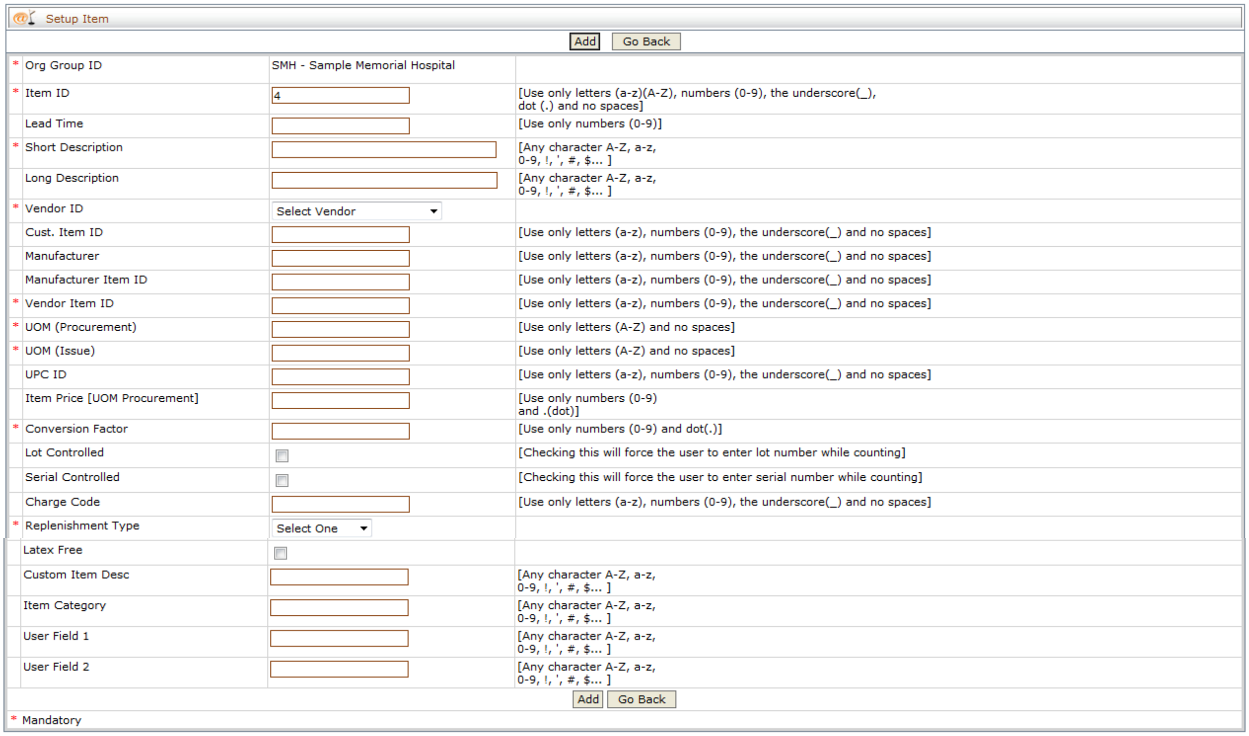
**Vendor Item ID –** Enter the Vendor's Item ID for this Item.

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

**Cust. Item ID –**  Custom Item ID for this item

To add a new item ***click*** the 

button to display: **Figure 234**



Setup Item

Add | Go Back

| | | |
|---|---|---|
| * Org Group ID | SMH - Sample Memorial Hospital | |
| * Item ID | 4 | [Use only letters (a-z)(A-Z), numbers (0-9), the underscore(_), dot (.) and no spaces] |
| Lead Time | | [Use only numbers (0-9)] |
| * Short Description | | [Any character A-Z, a-z, 0-9, !, ', #, $... ] |
| Long Description | | [Any character A-Z, a-z, 0-9, !, ', #, $... ] |
| * Vendor ID | Select Vendor | |
| Cust. Item ID | | [Use only letters (a-z), numbers (0-9), the underscore(_) and no spaces] |
| Manufacturer | | [Use only letters (a-z), numbers (0-9), the underscore(_) and no spaces] |
| Manufacturer Item ID | | [Use only letters (a-z), numbers (0-9), the underscore(_) and no spaces] |
| * Vendor Item ID | | [Use only letters (a-z), numbers (0-9), the underscore(_) and no spaces] |
| * UOM (Procurement) | | [Use only letters (A-Z) and no spaces] |
| * UOM (Issue) | | [Use only letters (A-Z) and no spaces] |
| UPC ID | | [Use only letters (a-z), numbers (0-9), the underscore(_) and no spaces] |
| Item Price [UOM Procurement] | | [Use only numbers (0-9) and .(dot)] |
| * Conversion Factor | | [Use only numbers (0-9) and dot(.)] |
| Lot Controlled | | [Checking this will force the user to enter lot number while counting] |
| Serial Controlled | | [Checking this will force the user to enter serial number while counting] |
| Charge Code | | [Use only letters (a-z), numbers (0-9), the underscore(_) and no spaces] |
| * Replenishment Type | Select One | |
| Latex Free | | |
| Custom Item Desc | | [Any character A-Z, a-z, 0-9, !, ', #, $... ] |
| Item Category | | [Any character A-Z, a-z, 0-9, !, ', #, $... ] |
| User Field 1 | | [Any character A-Z, a-z, 0-9, !, ', #, $... ] |
| User Field 2 | | [Any character A-Z, a-z, 0-9, !, ', #, $... ] |

Add | Go Back

* Mandatory

**Figure 234**

**Org Group ID –** Org Group ID for the item

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

**Lead Time -** Enter numeric value for number of days of lead time for ordering the item

**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.

**Cust. Item ID –** Custom item id

**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 [UOM Procurement] –** 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.

****Conversion Factor is UOP = CR * UOI)******

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

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

**Charge Code –** Item’s charge code

**Replenishment type –** Stock, Stockless, Consignment, Non-Stock

**Latex Free –** If option is checked, item is Latex Free…..if option is unchecked item is NOT Latex Free

**Custom Item Desc –** Description of the custom item

**Item Category –** Enter item category if needed

**User Field 1 –** Text field that can be used to capture information not available

**User Field 2 –** Text field that can be used to capture information not available

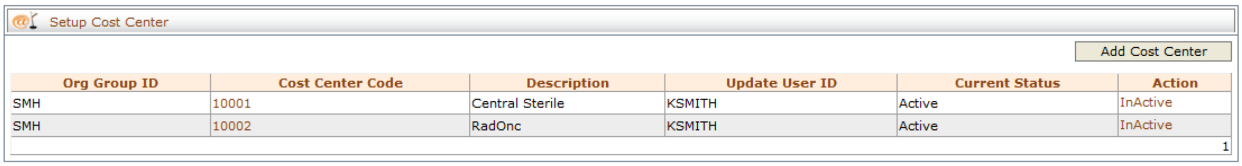
After entering all the necessary information, ***click*** the [Add] button to save the information.

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

## Setup Cost Centers

The next step in setting up items for organizations with no ERP MMIS system or using @Par POU/**Par Management** is to create cost centers.

***Select*** the **Setup Cost Centers** option from the **AtPar** menu option and you will receive the following screen: **Figure 235**




| Org Group ID | Cost Center Code | Description | Update User ID | Current Status | Action |
|---|---|---|---|---|---|
| SMH | 10001 | Central Sterile | KSMITH | Active | InActive |
| SMH | 10002 | RadOnc | KSMITH | Active | InActive |

**Figure 235**

You can either edit an existing cost center or add a new one. ***Click*** on the Add Cost Center button to add a cost center and you receive the following screen **Figure 236**

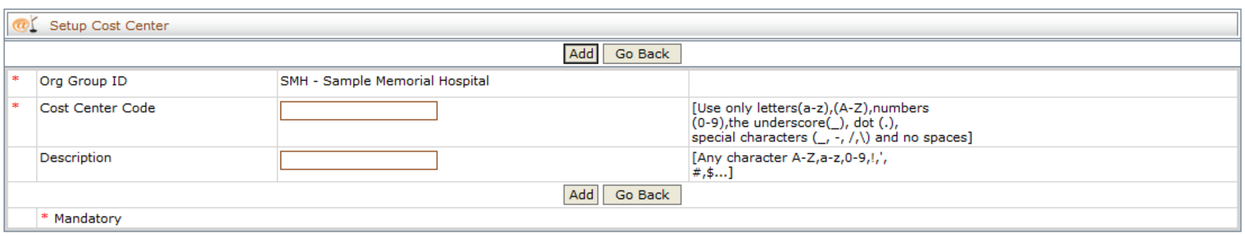
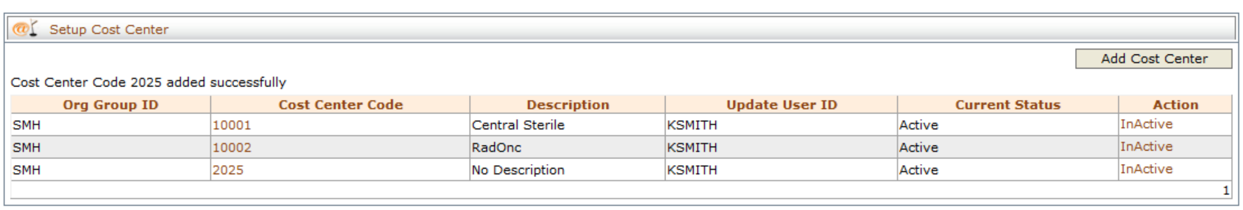



**Figure 236**

***Enter*** the Cost Center Code, and enter a description if desired.

***Click*** the Go Back button if you want to return to previous screen without saving, or ***click*** the Add button to save the new cost center. **Figure 237**




| Org Group ID | Cost Center Code | Description | Update User ID | Current Status | Action |
|---|---|---|---|---|---|
| SMH | 10001 | Central Sterile | KSMITH | Active | InActive |
| SMH | 10002 | RadOnc | KSMITH | Active | InActive |
| SMH | 2025 | No Description | KSMITH | Active | InActive |

**Figure 237**

After ***clicking*** the Add button, you can edit the new Cost Center by finding it in the previous Setup Cost Centers screen (**Figure 237**) and ***clicking*** on the highlighted link **Figure 238**


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

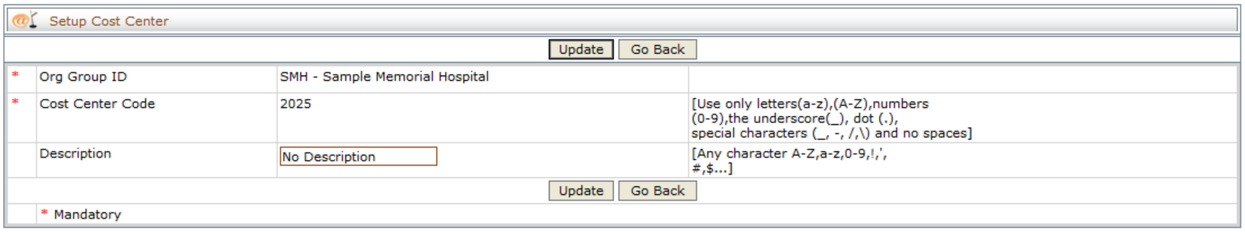



**Figure 238**

**NOTE:** You are not allowed to delete a Cost Center once saved. If you make an error and save a Cost Center incorrectly please contact your @Par Administrator.

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 Locations

The next step in setting up items for organizations with no ERP MMIS system or using @Par POU/**Par Management** is to create locations. Par Location or Inventory locations can be set up for use with @Par POU product.

***Select*** the **Setup Locations** link **Figure 239**

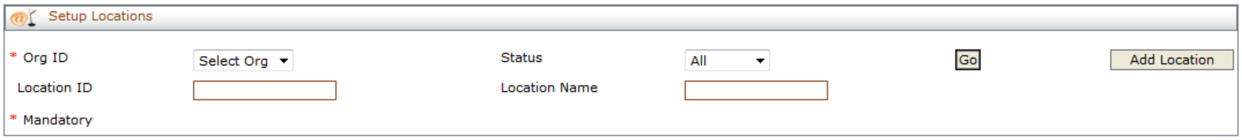



**Figure 239**

***Click*** the Add Location button **Figure 240**

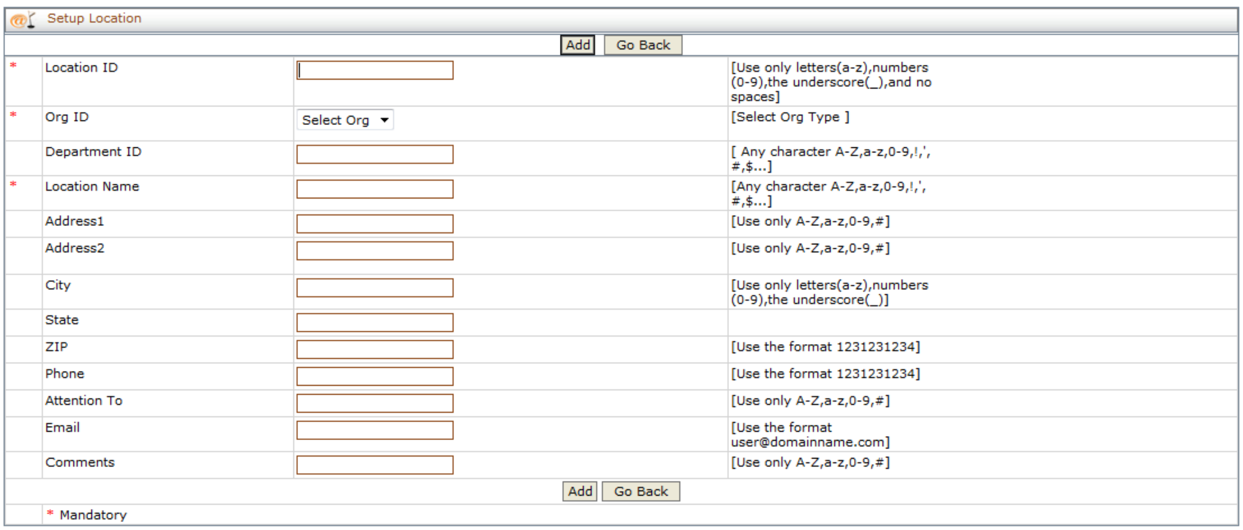



**Figure 240**

Enter all mandatory (*) fields and other applicable fields if required

***Click*** the Go Back button to return to previous screen without saving/adding location.

To save the Par Location header ***click*** the Add button **Figure 241**

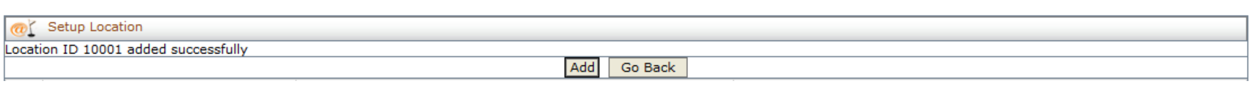



**Figure 241**

# Setup Storage Location Groups

For organizations requiring picking by Zone the **Setup Storage Location Groups** will be mandatory.

***Click*** the **Setup Storage Location Groups** option and following screen appears **Figure 242**

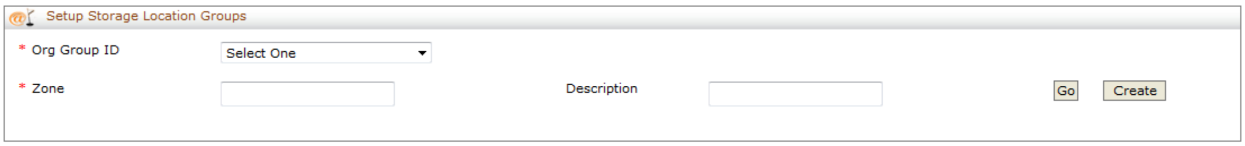



**Figure 242**

***Select*** the Org Group ID from the drop down list, enter a unique Zone, enter a Description for this Zone, and ***click*** the Create button **Figure 243**

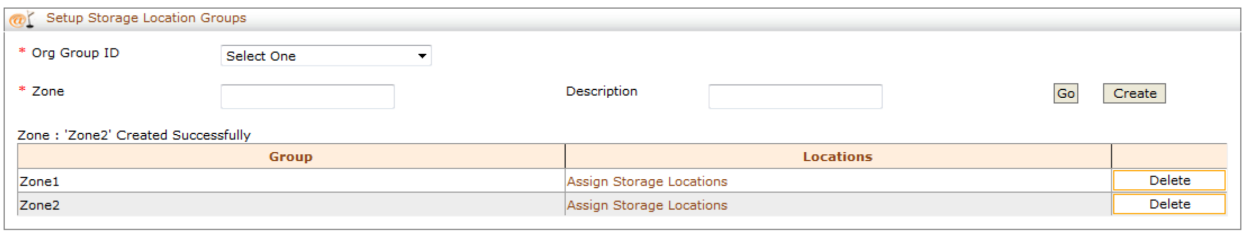



**Figure 243**

***Click*** on **Assign Storage Locations** link

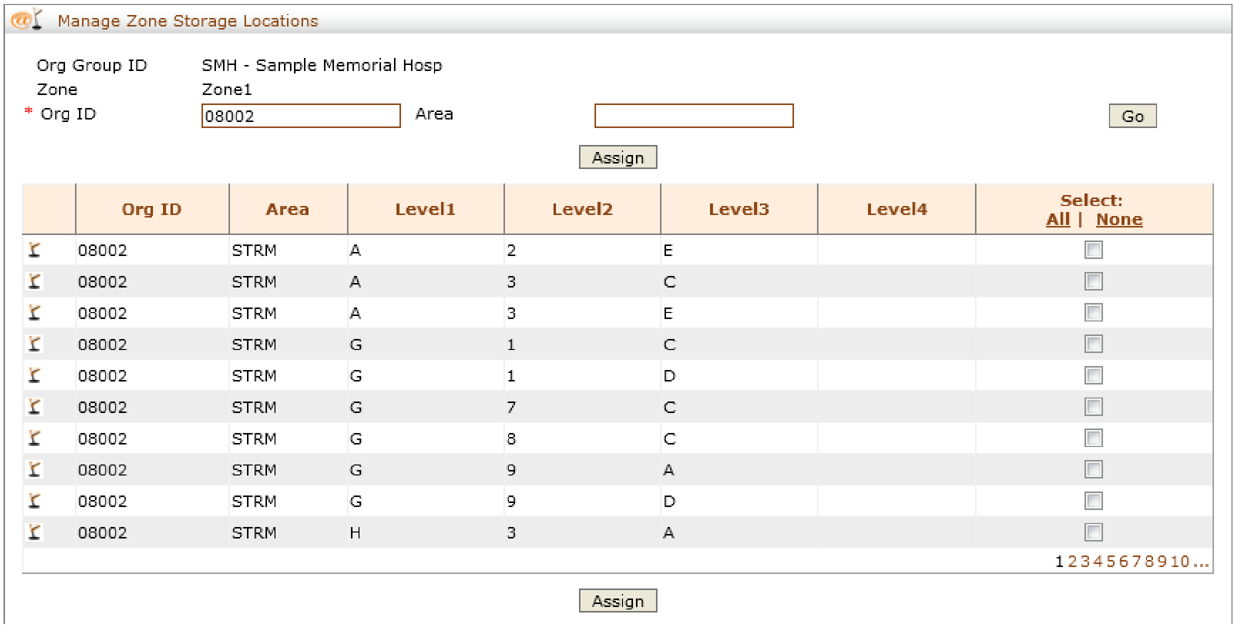
- When user clicks on Assign Storage Locations hyper link a pop-up window (**Figure 244**) similar to Assign Company/Business Units will open
- User will be able to see only those business units that are assigned to his Org Group


**Figure 244**

***Enter*** the Org ID/business unit.

***Entering*** an Area is optional.

***Click*** the Go button **Figure 245**



Manage Zone Storage Locations

Org Group ID SMH - Sample Memorial Hosp

Zone Zone1

* Org ID 08002 Area Go

Assign

| | Org ID | Area | Level1 | Level2 | Level3 | Level4 | Select: All \| None |
|---|---|---|---|---|---|---|---|
| | 08002 | STRM | A | 2 | E | | |
| | 08002 | STRM | A | 3 | C | | |
| | 08002 | STRM | A | 3 | E | | |
| | 08002 | STRM | G | 1 | C | | |
| | 08002 | STRM | G | 1 | D | | |
| | 08002 | STRM | G | 7 | C | | |
| | 08002 | STRM | G | 8 | C | | |
| | 08002 | STRM | G | 9 | A | | |
| | 08002 | STRM | G | 9 | D | | |
| | 08002 | STRM | H | 3 | A | | |

1 2 3 4 5 6 7 8 9 10 ...

Assign

**Figure 245**

To assign a storage location to the zone, the user will check the checkbox on the far right of the screen below.

Once all Storage Locations are checked ***click*** the 

button. This will save the storage locations to the Zone just created.

# Manage Org ID

To manage and maintain the Org ID without using the Manager Org Group Manage function ***click*** the **Manage Org ID** link and the following **Figure 246** screen will appear.


**Figure 246**

An Org ID can either be edited or added from this screen. ***Click*** on the Add Org button **Figure 247**

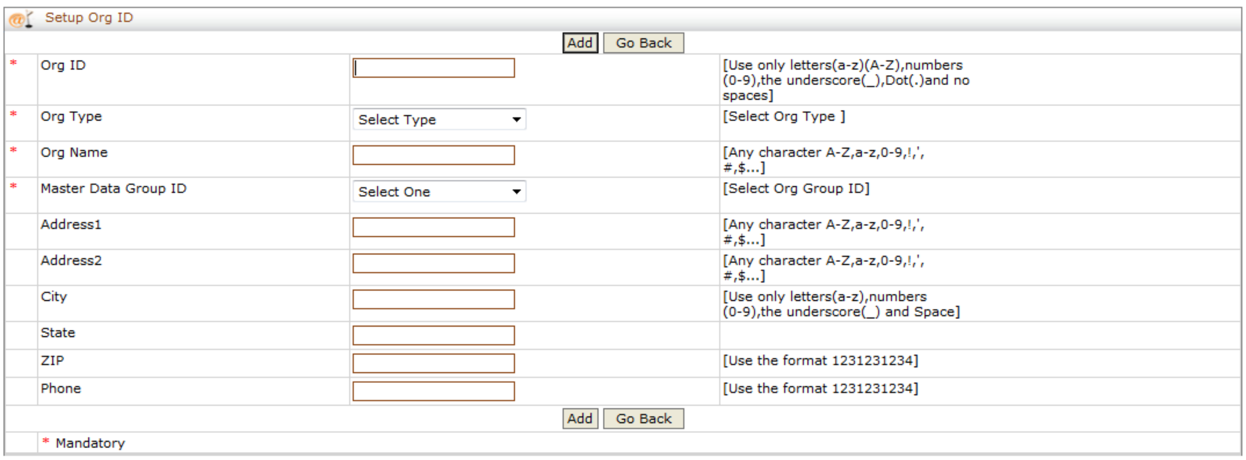



**Figure 247**

***Enter*** a unique Org ID.

***Select*** the Org Type from the dropdown list.
Purchasing
Inventory

**Enter** the Org ID name

***Select*** the Master Data Group ID from the dropdown list if associating the new Org ID to a master Org ID.

Fill in other optional fields as desired.

***Click*** the Go Back button to return to previous screen without saving/adding the org id.

To save the Par Location header ***click*** the Add button **Figure 248**

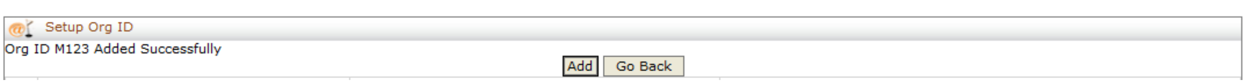



**Figure 248**

# Process Scheduler

The Process Scheduler option is used by supervisors to set up and schedule processing of issues or billing through previously defined HL7 messaging and is primarily used with the @Par POU product.

**Note:** The Process Parameters must first be set up prior to this function working correctly

***Click*** the **Process Scheduler** link **Figure 249**

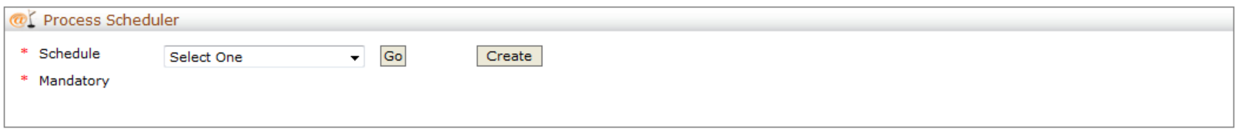



**Figure 249**

To create a new process ***click*** the Create button **Figure 250**

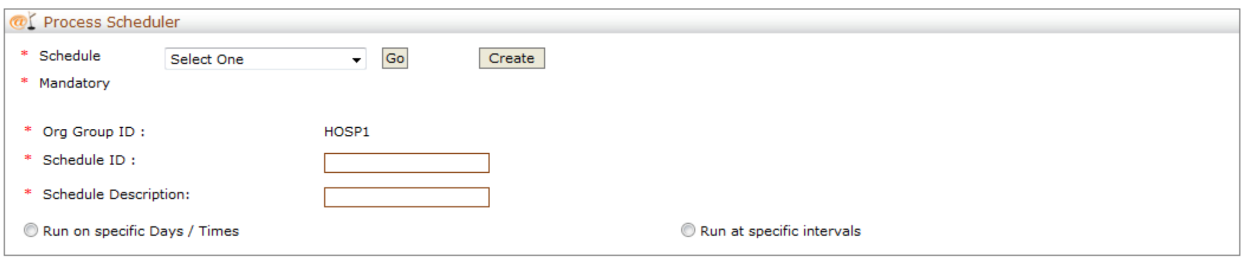



**Figure 250**

Enter the mandatory information of Schedule ID and Schedule Description. The Schedule ID **must** be unique. Once this information is entered, select one of the following buttons: "Run on specific Days/Times" or "Run at specific intervals"

***Click*** the "Run on specific Days/Times" button will display screen below **Figure 251**

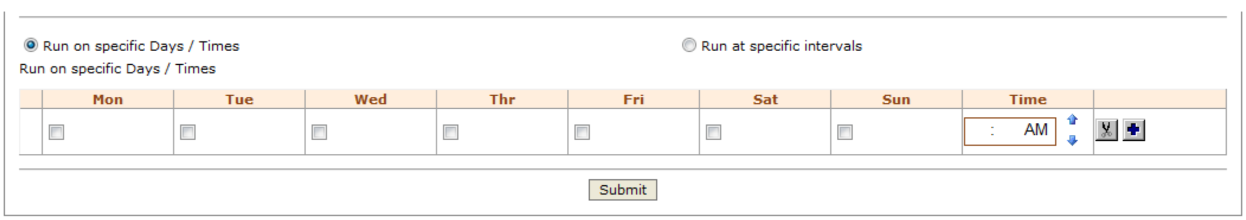



**Figure 251**

***Click*** in the day of the week and time to set this process to run. If you don't select the time and ***click*** on the button, the following message in the upper left hand portion of the screen appears **Figure 252**

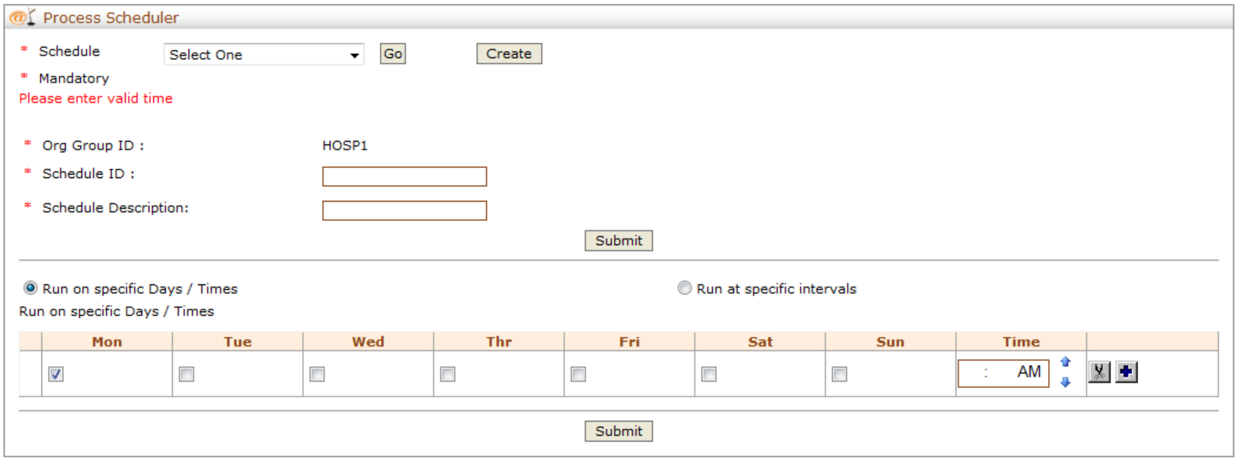
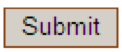



**Figure 252**

You can select as many different days and times and once you are ready to save all, ***click*** the 

button.  Each Schedule ID can have multiple lines (days, and times) set up.  This allows for more frequent processing occurrences.

***Click*** the “Run on specific Days/Times” button and display screen below appears **Figure 253**

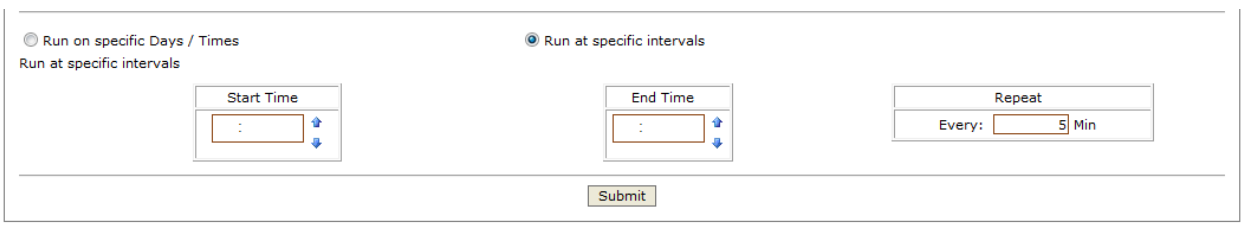



**Figure 253**

Enter the Start and End Time for process.  Then enter the repeat or recurrence minutes.  For example, if you want the process to run from midnight to 6:00 am and process every hour, enter 12:01 AM in Start Time, 06:00AM in End Time, and enter 60 in the Repeat every box.


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

# PMM Org and Profile Parameter

### Cart Count ORG Parameters

Products: Cart Count

Save

| Parameter | Value | Description |
|---|---|---|
| Allocation of Carts to Users Required | ☑ | [Unchecking this will allow any user to download Any Cart. Checking this will restrict the HHT user download only the carts allocated to the user] |
| 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] |
| Factor of safety percentage (%) for recommended par | | [Recommended Par will be calculated based on the Factor of safety, Recommended Par = Round (Average Usage * (1+Factor of Safety/100))] |
| Create HL7 billing message/file | ☑ | [[Checking this will send a HL7 billing message, unchecking will create a HL7 billing file in upload path.]] |
| Item Description Option on HHT | ○ DESCRSHORT<br>○ DESCR30<br>○ DESCR60<br>◉ DESCR254 | [Selected description value will be displayed] |
| Item Price Option on HHT | ◉ STANDARD_PRICE<br>○ CURR_PURCHASE_COST<br>○ AVG_COST | [Selected Item Price will be displayed in the reports on the server] |
| Truncate leading zeros | ☐ | [Checking this will truncate the leading zeros of a scanned Item ID] |

**Figure 254**

**Allocation of Carts to Users Required** – Default value with a check in this box requires that allocation of Carts/Par Locations must be done before a user can download information. It is recommended to keep this checked to allow users to download only allocated carts.

**Display of Soft Input Panel (Keypad) for numeric –** Displays only a numeric keypad on HHT

**Display of Soft Input Panel (Keypad) –** Displays alphanumeric keypad on HHT

**Factor of Safety for Recommended Par –** Recommended Par value on Optimization Report will be based on the percentage figure entered here.

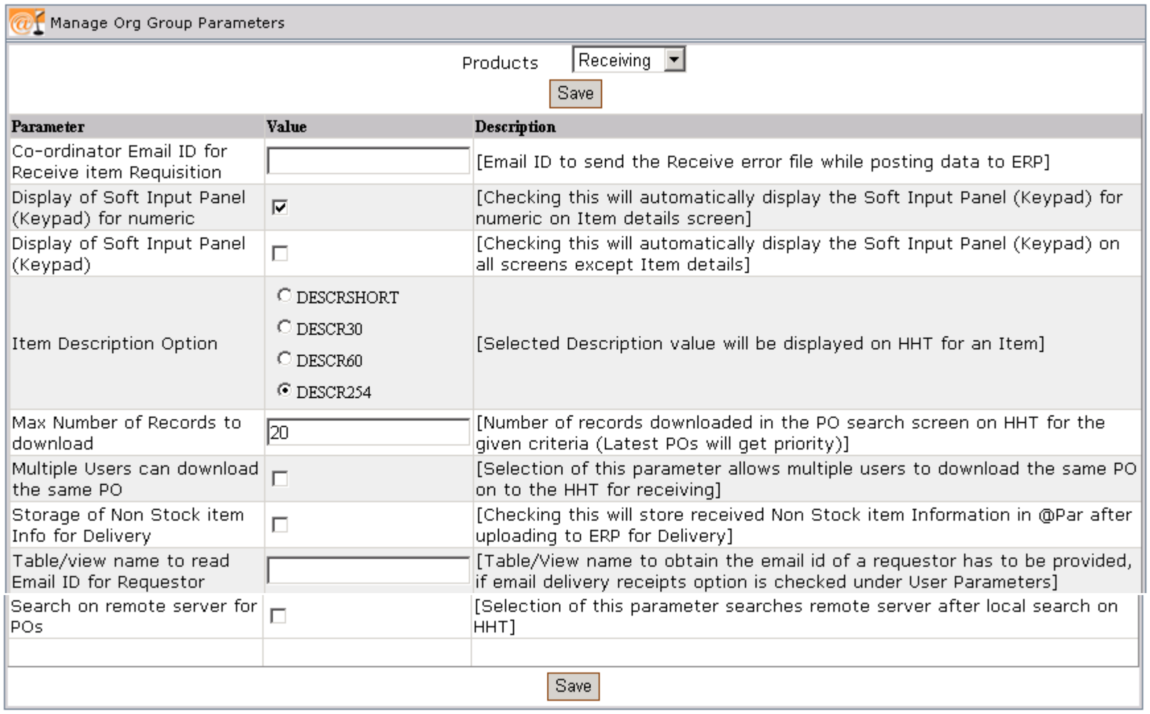
**Create HL7/Billing message file –** If your organization requires Billing information and has been set up for such, select this option which allows @Par to send data to your Billing system

**Item Description Option on HHT** – Used to select the Item description type which appears on the HHT.

**Item Price Option on HHT –** The item price will display on Web reports.

**Truncate leading zeroes -** Check this to truncate the leading zeroes of the item id

### Receiving ORG Parameters



Manage Org Group Parameters

Products: Receiving

Save

| Parameter | Value | Description |
|---|---|---|
| Co-ordinator Email ID for Receive item Requisition | | [Email ID to send the Receive error file while posting data to ERP] |
| 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] |
| Item Description Option | ○ DESCRSHORT ○ DESCR30 ○ DESCR60 ◉ DESCR254 | [Selected Description value will be displayed on HHT for an Item] |
| Max Number of Records to download | 20 | [Number of records downloaded in the PO search screen on HHT for the given criteria (Latest POs will get priority)] |
| Multiple Users can download the same PO | ☐ | [Selection of this parameter allows multiple users to download the same PO on to the HHT for receiving] |
| Storage of Non Stock item Info for Delivery | ☐ | [Checking this will store received Non Stock item Information in @Par after uploading to ERP for Delivery] |
| Table/view name to read Email ID for Requestor | | [Table/View name to obtain the email id of a requestor has to be provided, if email delivery receipts option is checked under User Parameters] |
| Search on remote server for POs | ☐ | [Selection of this parameter searches remote server after local search on HHT] |

Save

**Figure 255**

**Co-ordinator Email ID for Receive Item Requisition –** Enter the email address of individual that receives error message while Receive Item Requisition posting

**Display of Soft Input Panel (Keypad) for numeric –** Displays only a numeric keypad on HHT

**Display of Soft Input Panel (Keypad) –** Displays alphanumeric keypad on HHT

**Item Description Option** – Selects the item description to display on HHT

**Max Number of Records to download** – Used to restrict the search results for open Pos from ERP system.

**Multiple users can download the same PO** – Checking this will allow multiple users to download the same PO

**Storage of Non Stock item info for delivery –** Checking this will store non stock items received from @Par for use in the @Par Deliver product

**Table/view name to read Email ID for Requestor –** Enter Table or View that has been created to store Email ID for Deliver to requestor.  Note:  This has to be created in your ERP system by the DBA first before the functionality will work.  This is used on @Par Deliver to print receipts.

**Search on remote server for PO –** When selected, this will search HHT and then remote server for PO on the HHT

## Cart Profile Parameters

Profile Parameters

Save

| 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 Qty. greater than Par Value | ☐ | [Checking this will allow users to enter the count quantity greater than par value] |
| Allow access to Carts allocated to Group Users | ☐ | [Checking this will allow complete access to carts allocated to other users in the group, the activity information still is captured for the user who does the actual count] |
| Disable bulk label printing | ☐ | [Checking this will disable the bulk label printing option] |
| Charge Capture | ☐ | [Checking this will allow the users to Capture Charges on the handheld from Patient Charge Cards] |
| Default Input | ☐ | [Checking this will default the value to "0" in case of Count Option and to Par Value in case of Request Option on the HHT] |
| Delete Cart Items after upload | ☑ | [Checking this will delete the cart profile (items data) on the HHT after 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] |
| Allow editing of Par value on the HHT | ☐ | [Checking this will allow handheld users to edit the Par value on the HHT and the Server users to edit the Par value in the Optimization Report. Audit trail is maintained for all the changes] |
| Ignore Putaway qty | ☐ | [Checking this will allow the Putaway Qty greater than Order Qty.Unchecking this will enable the system to generate an error when putaway Qty is greater than Order Qty.] |
| Item Count High% | 100 | [If Item Order % (Qty Ordered / Par Value) value greater than this % value , the transaction will be captured for reporting] |
| Item Count Low% | 0 | [If Item Order % (Qty Ordered / Par Value) value lower than this % value , the transaction will be captured for reporting] |
| Mandatory Count | ☐ | [Checking this will make it mandatory for the HHT user to enter Counts for all the items in the Cart / Par Location] |
| Putaway of Cart Items | ☐ | [Checking this will allow the users to do put away of cart items.] |
| Default Count Option (Count/Request) | ◉ Count<br>○ Request<br>○ None | [Sets the default Item count option on the HHT] |
| Ability to Select count option on HHT | ☐ | [Checking this will enable the user to select the Count Option at the time of counting on the handheld] |
| Max. allowable Count/Request Quantity | 99999999999.9999 | [User will be able to count/request up to the max. allowable quantity set.] |
| Max. allowable number of digits | 11 | [Force user to count/request qty less than number of digits set(this includes numbers and decimal)] |
| Sort By Column | ☐ | [Checking this will allow the user to sort the columns on the HHT] |
| Super User | ☐ | [Allows user to view, modify, upload, delete other users data on handheld] |

Save

**Figure 256**

**Allow users to do only put away of cart items –** The Putaway of Cart 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 Items ONLY If this option is UNCHECKED, user can perform Cart Count and Put away functions

**Allow Qty. greater than Par Value –** Checking this allows users to enter a count quantity greater than the Par Value.

**Allow access to Carts allocated to Group Users –** Checking this allows the user to access other user's allocated carts. For example, if checked, this user will have the ability to login to the hand held and then download either their allocated carts or those of another user in their group

**Disable bulk label printing –** If users select the PRINT option from the Cart Count status screen, it will print label for Par Location/Cart ID header and all items. Selecting this option will disable the PRINT capability from the Cart Count status screen.

**Ignore modified Cart Definition on Upload -** Checking this will allow user to send data to the ERP system even if there is an item error on the upload. If this is not checked, no items will be sent to the ERP system and the user will have to download the items and recount all.

**Charge Capture –** If your organization uses Patient Charge Cards, checking this option will allow HHT user to capture patient charges

**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 option 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 counted cart and items are sent to the server. Unchecked will clear the count information but keep the items on the HHT so that they do not need to be re-downloaded. NOTE: If items are kept on HHT each time, there is the potential the user will not download the most current information. Recommend that you check this option.

**Display FOQ/Max/Par Value –** Checking this option allows users to view FOQ or Max values on the HHT.

**Allow editing of par value on the HHT –** Checking this allows the user to edit par values from on the HHT. An edited par value for a cart must be uploaded, processed on the ERP, and downloaded again to display it on the HHT.

**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.

**Item Count Low – and Item Count High –** These parameters are used in the Cart Exception Report to denote threshold values below and above the entered 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 adjust Par Values over time

**Mandatory Count –** If checked, this will force user to enter a value for each and every item on the Cart/Par Location.

**Putaway of Cart Items –** Checking this will allow user to putaway cart items.

**Default Count Option –** Sets the default count option on the HHT. Count to have user perform actual counts. Request to have user perform requested quantity count.

**Ability to Select count option on HHT –** Selecting this will allow user to select count option at time of counting items on the HHT.

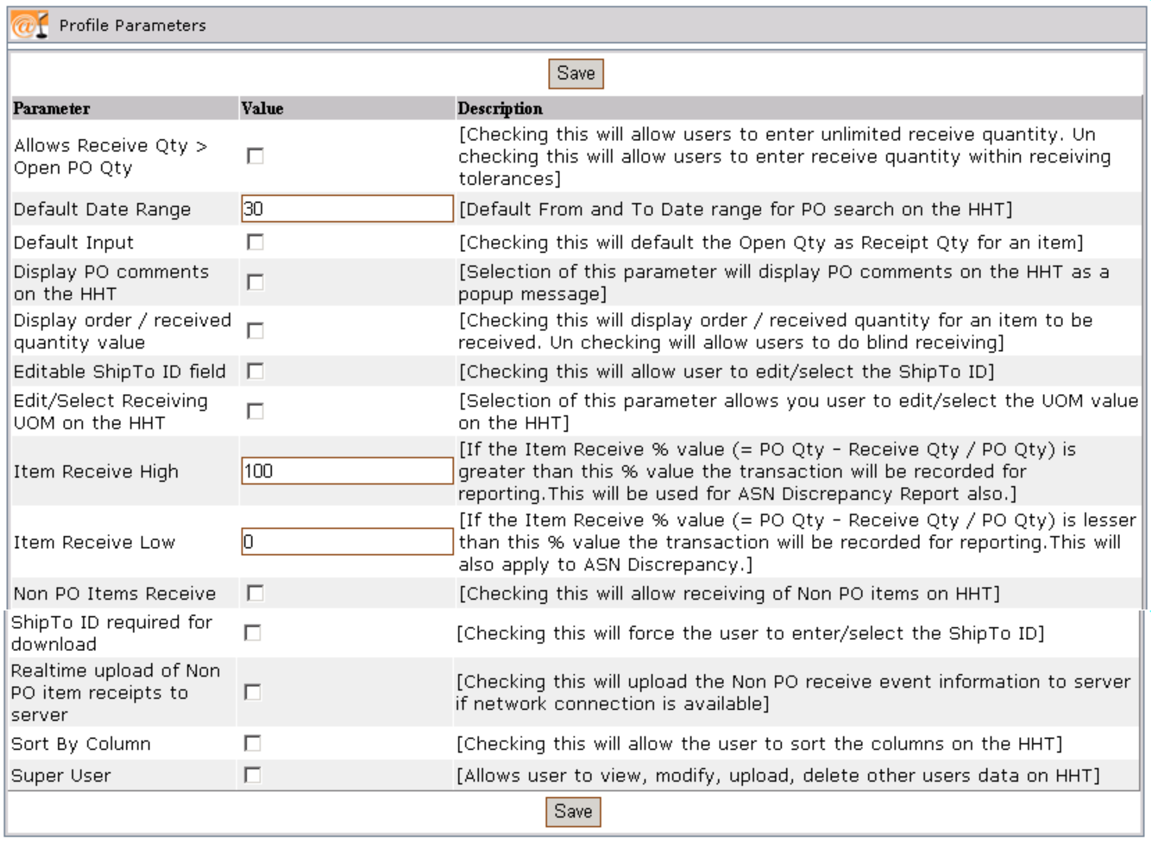
**Max allowable Count/Request quantity –** Enter the maximum allowable mask to use for HHT user. For example, if you want to limit user to 9,999 as the most they can enter then enter 9999.99 in this field.

**Max allowable number of digits –** Value entered in this field will limit maximum number of fields for HHT user. 11 = 999999999.99, if you enter 6 here it would limit HHT user to 9999.99.

**Sort by column –** Checking this will allow the user to sort within the columns of the Item count screen. For example, if the first column on the Item Count screen is Item Id, and you have checked this box, the display will be in Item id order on the HHT

**Super User –** If checked, the selected user will be able to view the records of all users on a given HHT. This can be used in a situation where a user leaves for the day without uploading carts, and his or her supervisor can log in to the same HHT and upload the unsent carts or finish counting the carts

### Receiving Profile Parameters



Profile Parameters

Save

| Parameter | Value | Description |
|---|---|---|
| Allows Receive Qty > Open PO Qty | ☐ | [Checking this will allow users to enter unlimited receive quantity. Un checking this will allow users to enter receive quantity within receiving tolerances] |
| Default Date Range | 30 | [Default From and To Date range for PO search on the HHT] |
| Default Input | ☐ | [Checking this will default the Open Qty as Receipt Qty for an item] |
| Display PO comments on the HHT | ☐ | [Selection of this parameter will display PO comments on the HHT as a popup message] |
| Display order / received quantity value | ☐ | [Checking this will display order / received quantity for an item to be received. Un checking will allow users to do blind receiving] |
| Editable ShipTo ID field | ☐ | [Checking this will allow user to edit/select the ShipTo ID] |
| Edit/Select Receiving UOM on the HHT | ☐ | [Selection of this parameter allows you user to edit/select the UOM value on the HHT] |
| Item Receive High | 100 | [If the Item Receive % value (= PO Qty - Receive Qty / PO Qty) is greater than this % value the transaction will be recorded for reporting.This will be used for ASN Discrepancy Report also.] |
| Item Receive Low | 0 | [If the Item Receive % value (= PO Qty - Receive Qty / PO Qty) is lesser than this % value the transaction will be recorded for reporting.This will also apply to ASN Discrepancy.] |
| Non PO Items Receive | ☐ | [Checking this will allow receiving of Non PO items on HHT] |
| ShipTo ID required for download | ☐ | [Checking this will force the user to enter/select the ShipTo ID] |
| Realtime upload of Non PO item receipts to server | ☐ | [Checking this will upload the Non PO receive event information to server if network connection is available] |
| Sort By Column | ☐ | [Checking this will allow the user to sort the columns on the HHT] |
| Super User | ☐ | [Allows user to view, modify, upload, delete other users data on HHT] |

Save

**Figure 257**

**Allows Receive Qty > Open PO qty** – Checking this allows users to enter a receive quantity greater than the order quantity of an open PO.

**Default Date Range –** Used for a default date to search for items on an open PO. Enter a value in days.

**Default Input** – Checking this option will automatically default the Open PO ordered Qty into the Receive Qty field on the HHT.

- This is useful when majority of the item quantities of a PO are received in full so user can edit exceptions without entering line by line quantities

**Display PO comments on the HHT** – Checking this will allow PO comments to display as a pop up message.

**Display order/received quantity value –** Checking this option will display the received and open PO order quantity on the HHT.  Uncheck to require user to perform a blind count.

**Editable Ship To ID field** – Checking this will allow user to edit the Ship To ID value on the HHT.

**Edit/Select Receiving UOM on the HHT** – Checking this will allow user to edit the UOM on the HHT.

**Item Receive High –** Items received with a percentage less than entered amount will display on report.

**Item Receive Low –** Items received with a percentage greater than entered amount will display on report.

**Non PO Items Receive –** If this option is checked, user will have ability to scan/enter NON PO items to receive.  There will be an additional button (NON PO) appear on the HHT.

**Ship To ID required for download** – This value has to be entered on the HHT in order to download a PO from ERP system.

**Realtime Upload of Non PO item receipts to server –** Check this option to ensure data is sent from HHT after the client user clicks on the send button.  This needs to be in WIRELESS MODE.

**Sort by Column –** Checking this will allow the user to sort within the columns of the Item count screen.   For example, if the first column on the Item Count screen is Item Id, and you have checked this box, the display will be in Item id order on the HHT

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

**Receiving Menu Access:**

Profile Menu Access

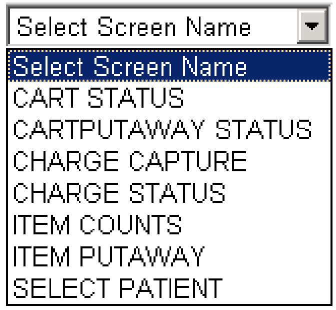
Save

| Select All \| None | Menu Name | Menu Sub Group | Menu Seq |
|---|---|---|---|
| ☑ | Activity Report | Reports | 6 |
| ☑ | Allocate ShipToIDs | Setup | 5 |
| ☑ | Carrier Information | Setup | 2 |
| ☑ | Carrier Report | Reports | 7 |
| ☑ | Daily Activity | Reports | 8 |
| ☑ | Daily User Activity | Reports | 9 |
| ☑ | Deviation Report | Reports | 10 |
| ☑ | Release Orders | Setup | 1 |
| ☑ | User Parameters | Setup | 4 |

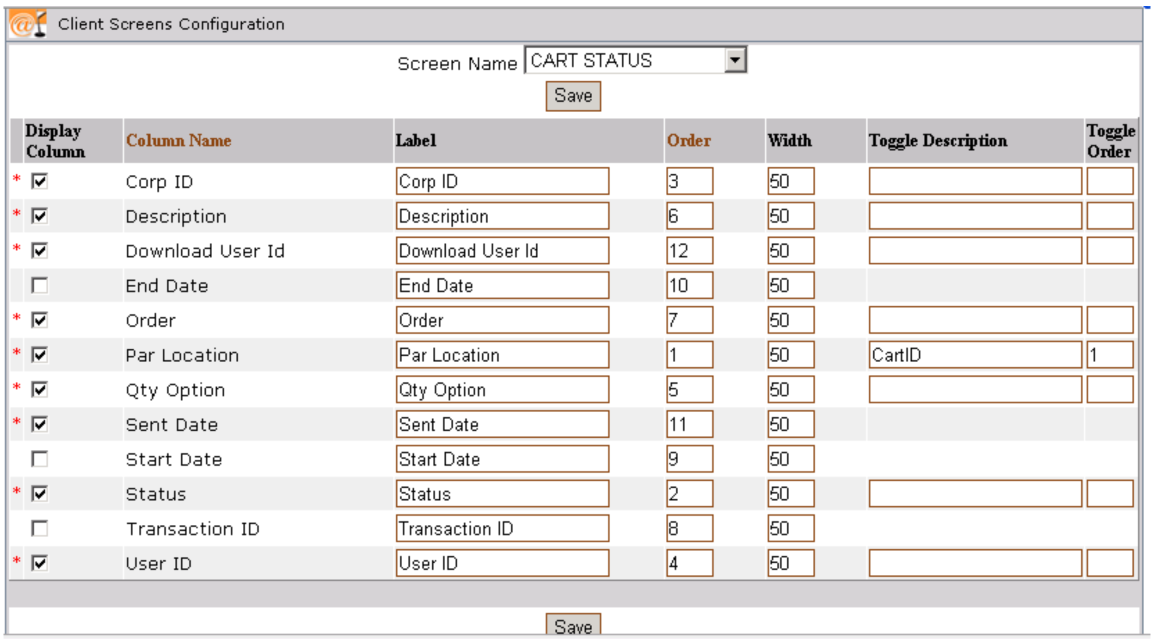
Save

**Figure 258**

## Cart – Client Screen Configurations:




## Cart Status - Client Screens Configuration:



Client Screens Configuration

Screen Name: CART STATUS

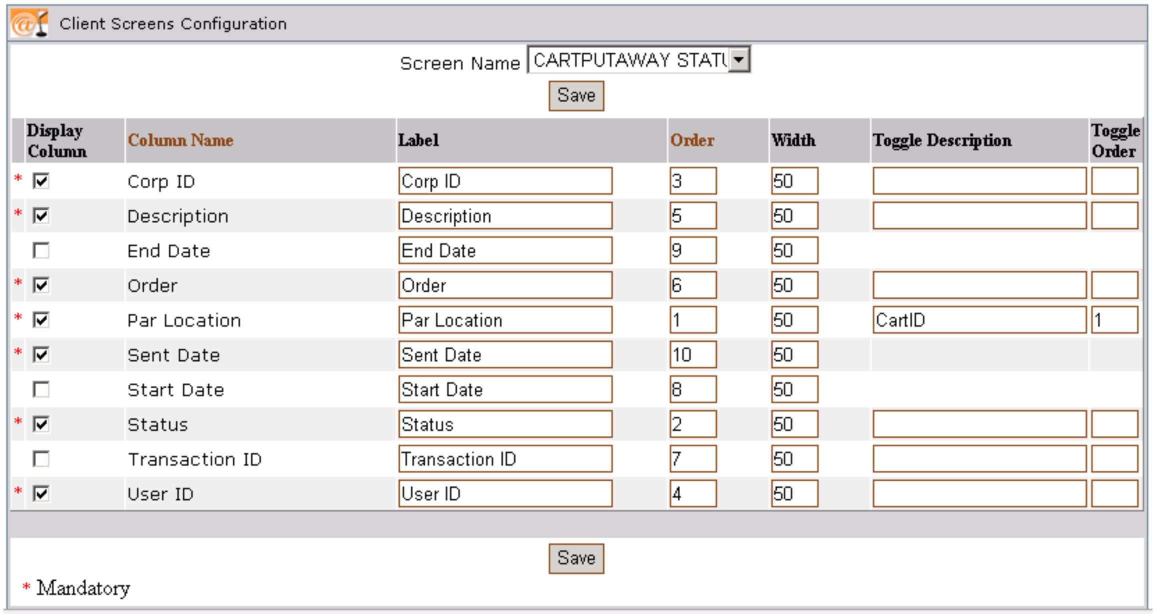
Save

| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | Corp ID | Corp ID | 3 | 50 | | |
| * ☑ | Description | Description | 6 | 50 | | |
| * ☑ | Download User Id | Download User Id | 12 | 50 | | |
| ☐ | End Date | End Date | 10 | 50 | | |
| * ☑ | Order | Order | 7 | 50 | | |
| * ☑ | Par Location | Par Location | 1 | 50 | CartID | 1 |
| * ☑ | Qty Option | Qty Option | 5 | 50 | | |
| * ☑ | Sent Date | Sent Date | 11 | 50 | | |
| ☐ | Start Date | Start Date | 9 | 50 | | |
| * ☑ | Status | Status | 2 | 50 | | |
| ☐ | Transaction ID | Transaction ID | 8 | 50 | | |
| * ☑ | User ID | User ID | 4 | 50 | | |

Save

**Figure 259**

## Cart Putaway Status - Client Screens Configuration:


Client Screens Configuration

Screen Name CARTPUTAWAY STATU

Save

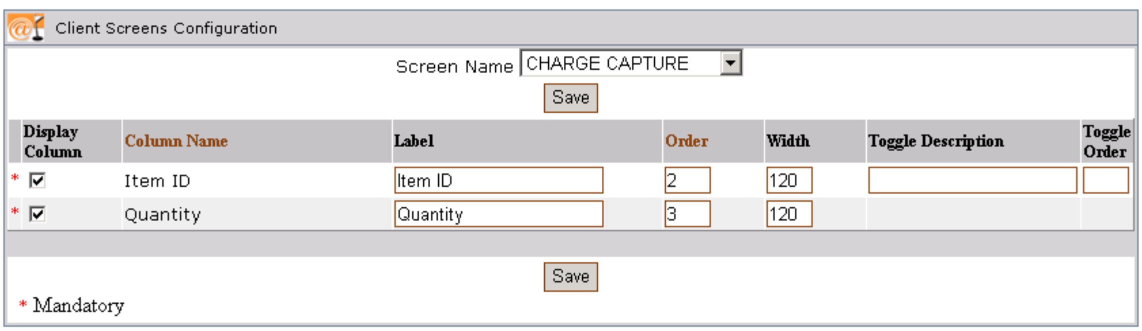
| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Corp ID | Corp ID | 3 | 50 | | |
| * | ☑ | Description | Description | 5 | 50 | | |
| | ☐ | End Date | End Date | 9 | 50 | | |
| * | ☑ | Order | Order | 6 | 50 | | |
| * | ☑ | Par Location | Par Location | 1 | 50 | CartID | 1 |
| * | ☑ | Sent Date | Sent Date | 10 | 50 | | |
| | ☐ | Start Date | Start Date | 8 | 50 | | |
| * | ☑ | Status | Status | 2 | 50 | | |
| | ☐ | Transaction ID | Transaction ID | 7 | 50 | | |
| * | ☑ | User ID | User ID | 4 | 50 | | |

Save

* Mandatory

Figure 260

**Charge Capture - Client Screens Configuration:**


Client Screens Configuration

Screen Name CHARGE CAPTURE

Save

| | Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|---|
| * | ☑ | Item ID | Item ID | 2 | 120 | | |
| * | ☑ | Quantity | Quantity | 3 | 120 | | |

Save

* Mandatory

Figure 261

**Charge Status - Client Screens Configuration:**


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

Client Screens Configuration

Screen Name: CHARGE STATUS

Save

| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| ☐ | Capture ID | Capture ID | 7 | 50 | | |
| * ☑ | MRC | MRC | 1 | 50 | MRC | 1 |
| * ☑ | Name | Name | 2 | 50 | | |
| * ☑ | Par | Par | 3 | 50 | Par | 2 |
| * ☑ | Service Date | Service Date | 8 | 50 | | |
| * ☑ | Status | Status | 4 | 50 | | |
| ☐ | Transaction Date | Transaction Date | 5 | 50 | | |
| * ☑ | User ID | User ID | 6 | 50 | | |

Save

* Mandatory

Figure 262

## Item Counts - Client Screens Configuration:

Client Screens Configuration

Screen Name: ITEM COUNTS

Save

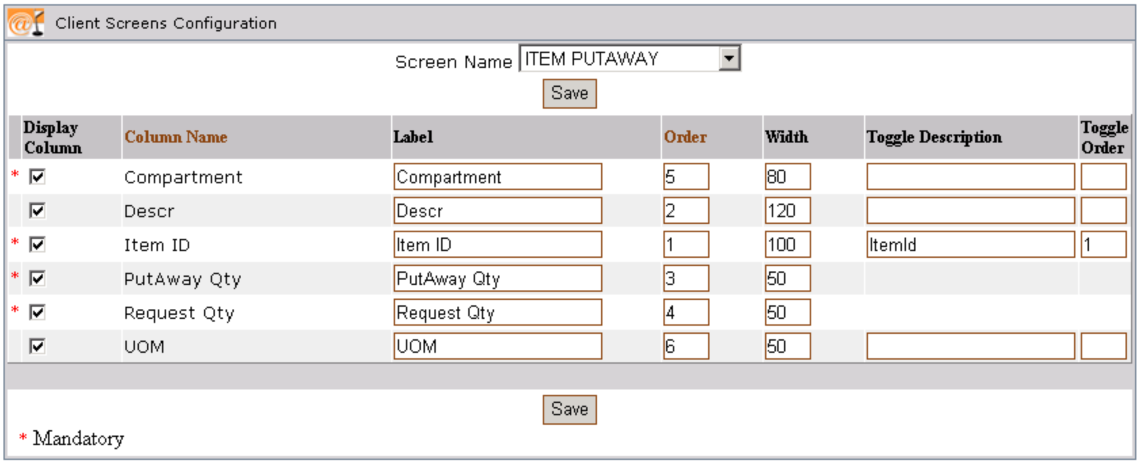
| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | Compt | Compt | 6 | 80 | | |
| ☐ | Count Ord | Count Ord | 8 | 50 | | |
| * ☑ | Count Qty | Count Qty | 3 | 50 | | |
| ☐ | Count Reqd | Count Reqd | 7 | 50 | | |
| ☑ | Descr | Descr | 2 | 120 | | |
| ☐ | FOQ | FOQ | 10 | 50 | | |
| * ☑ | GTIN | GTIN | 10 | 50 | | |
| * ☑ | Item Id | Item Id | 1 | 80 | ItemId | 1 |
| ☐ | Item No | Cust.Item | 17 | 800 | | |
| ☑ | Manf Item Id | Manf Item Id | 16 | 50 | | |
| ☐ | Max. Qty | Max. Qty | 11 | 50 | | |
| ☐ | Non Stock | Non Stock | 14 | 50 | | |
| * ☑ | Opt. Qty | Opt. Qty | 4 | 50 | | |
| ☐ | Price | Price | 16 | 50 | | |
| * ☑ | Print Later Flag | Print Later Flag | 19 | 50 | | |
| ☐ | Replen Opt | Replen Opt | 13 | 50 | | |
| ☐ | Replen. Ctrl | Replen. Ctrl | 12 | 50 | | |
| ☑ | UOM | UOM | 9 | 50 | | |
| ☐ | UPC_ID | UPN Id | 5 | 80 | | |
| ☐ | Vend Item Id | Vend Item Id | 15 | 50 | | |

Save

* Mandatory

Figure 263

**Item Putaway - Client Screens Configuration:**



Client Screens Configuration

Screen Name ITEM PUTAWAY

Save

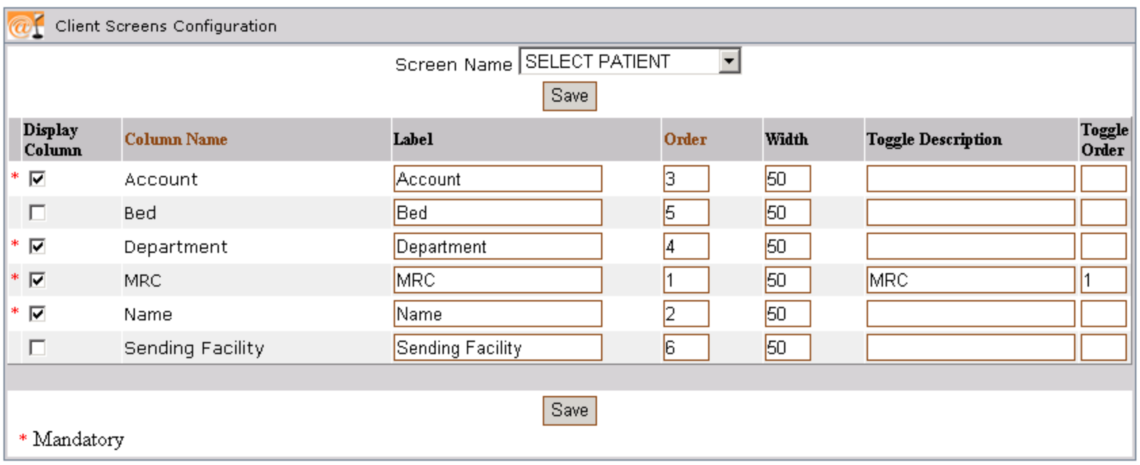
| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | Compartment | Compartment | 5 | 80 | | |
| ☑ | Descr | Descr | 2 | 120 | | |
| * ☑ | Item ID | Item ID | 1 | 100 | ItemId | 1 |
| * ☑ | PutAway Qty | PutAway Qty | 3 | 50 | | |
| * ☑ | Request Qty | Request Qty | 4 | 50 | | |
| ☑ | UOM | UOM | 6 | 50 | | |

Save

* Mandatory

**Figure 264**

**Select Patient - Client Screens Configuration:**



Client Screens Configuration

Screen Name SELECT PATIENT

Save

| Display Column | Column Name | Label | Order | Width | Toggle Description | Toggle Order |
|---|---|---|---|---|---|---|
| * ☑ | Account | Account | 3 | 50 | | |
| ☐ | Bed | Bed | 5 | 50 | | |
| * ☑ | Department | Department | 4 | 50 | | |
| * ☑ | MRC | MRC | 1 | 50 | MRC | 1 |
| * ☑ | Name | Name | 2 | 50 | | |
| ☐ | Sending Facility | Sending Facility | 6 | 50 | | |

Save

* Mandatory

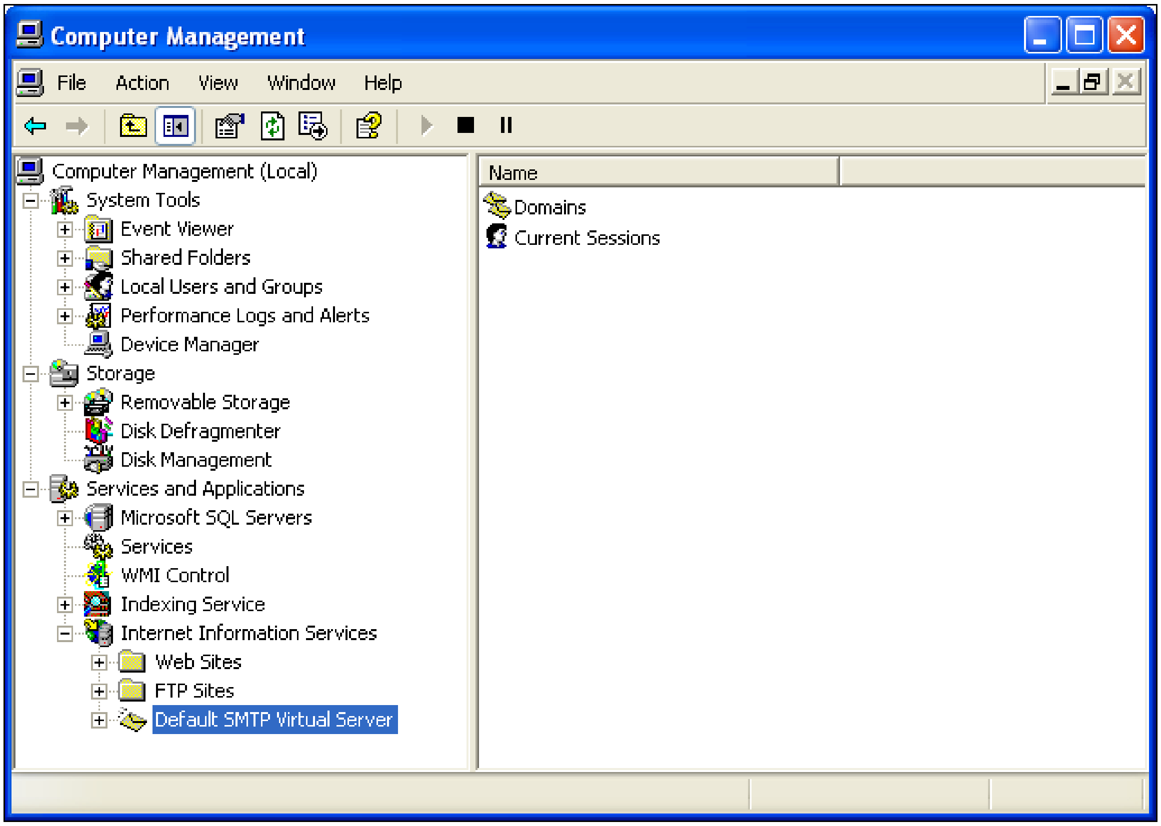
**Figure 265**

# IIS server

## PRIOR TO MODIFYING OR ADJUSTING ANY IIS SETTINGS YOUR IT AND @PAR SUPPORT DEPARTMENT MUST REVIEW!

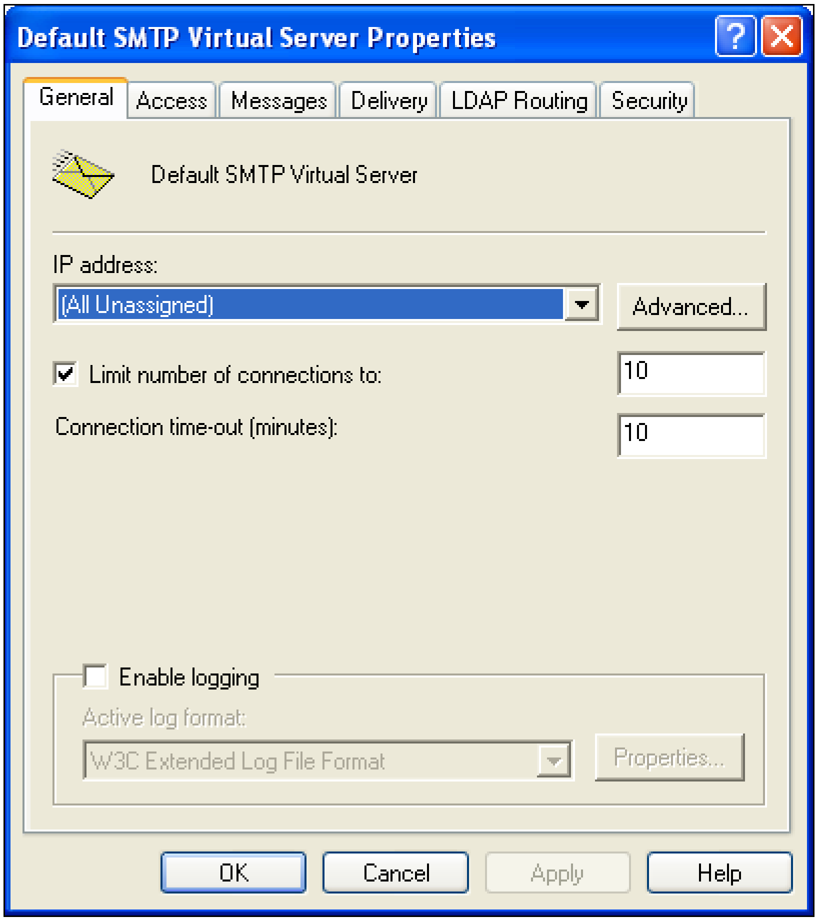
***To configure IIS server:***

1. Right click on **My computer** icon and click **Manage**. The Computer Management view appears.

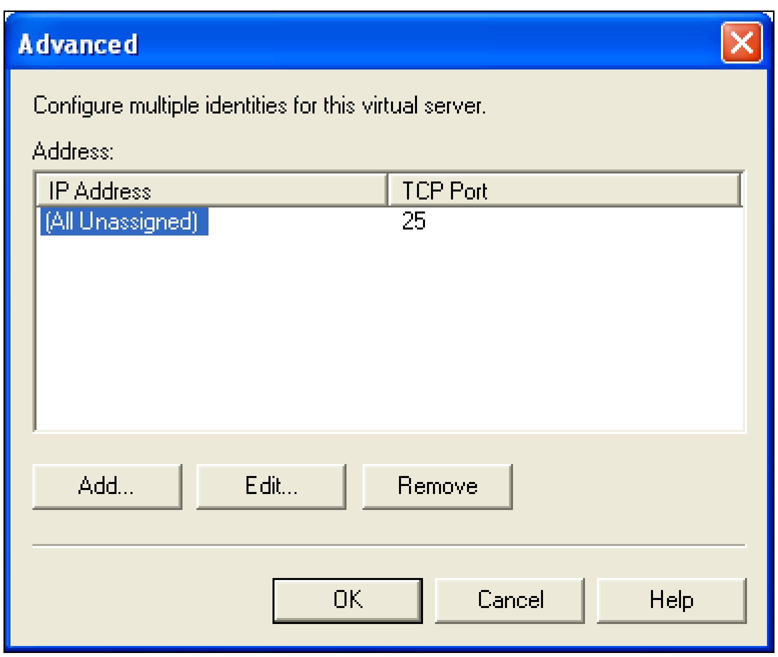



3. Expand **Services and applications** tree. Various menus appear.
4. Expand **Internet Information Service** menu. Various sub menus appear.
5. Right click on **Default SMTP Virtual Server Properties** menu. The **Default SMTP Virtual Server Properties** view appears with General tab selected by default.

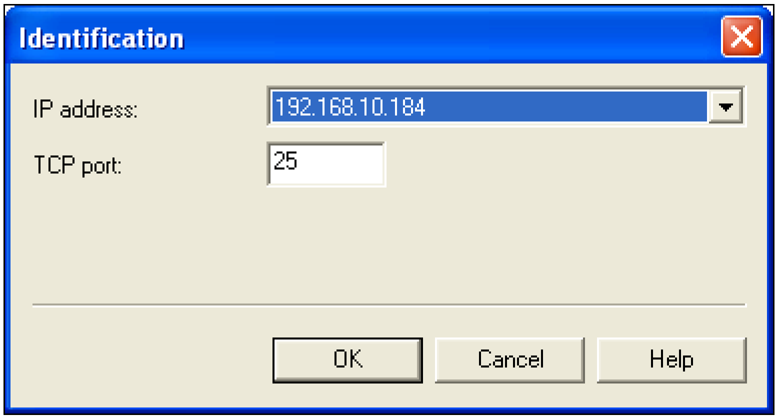

501 Kings Hwy East Fairfield, CT 06825 Phone: (888) 647-4621 Fax: (888) 647-4621




6. Click **Advanced**. The Advanced view appears.

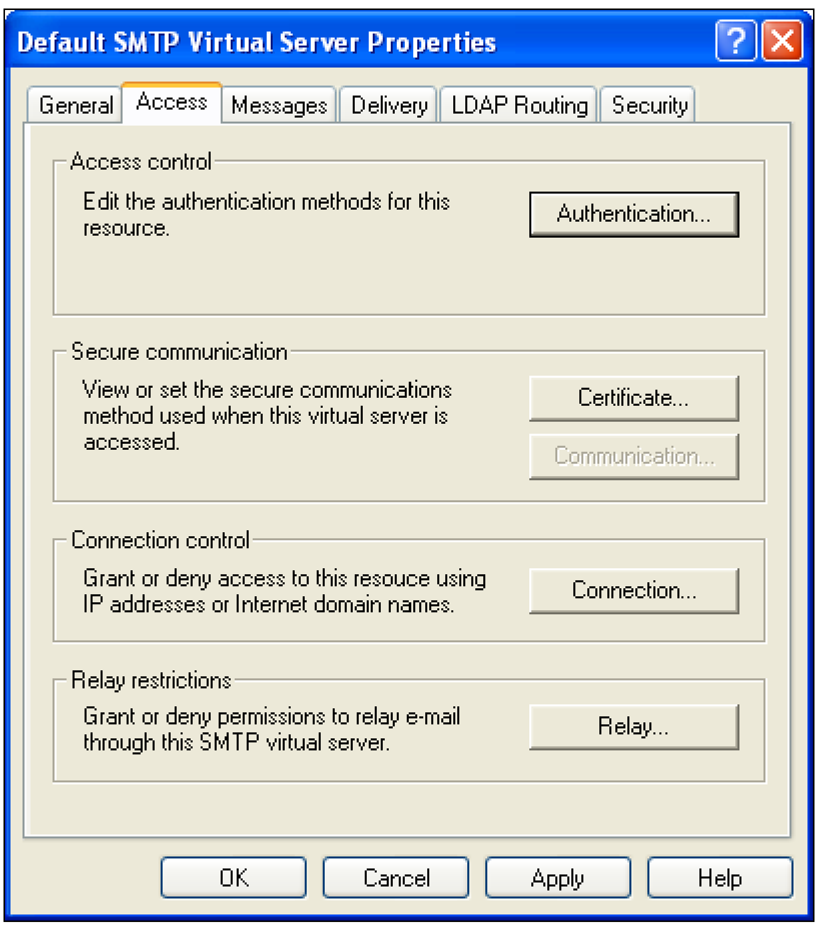



10. Click **Add**. The Identification view appears.

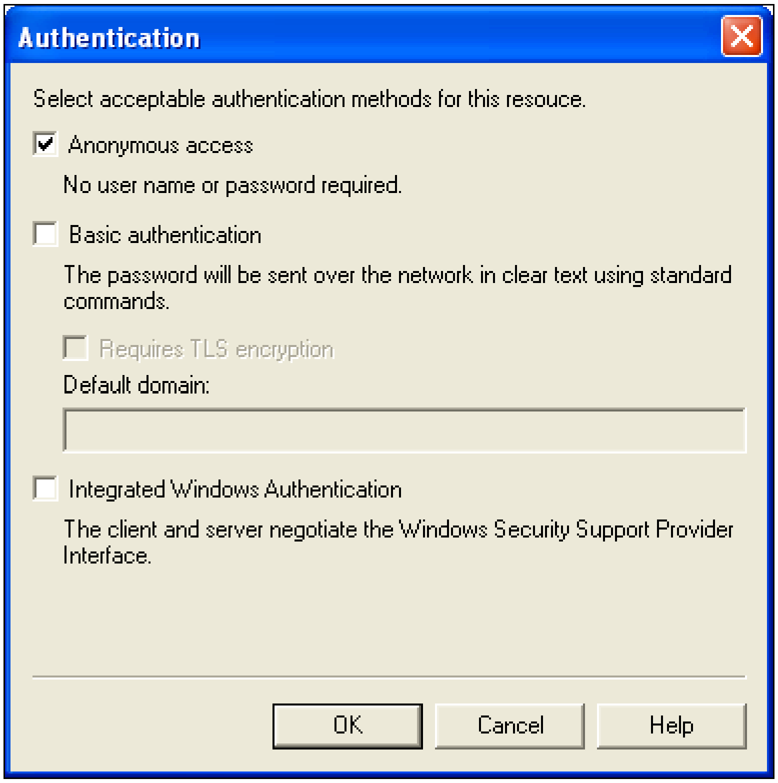



8. Select an **IP address**. Select the same IP address as in email configuration view under Configuration Manager of @Par menu.
9. Enter **TCP port** number.
10. Click **OK**. The Default SMTP Virtual Server Properties view appears.

Under Access tab:



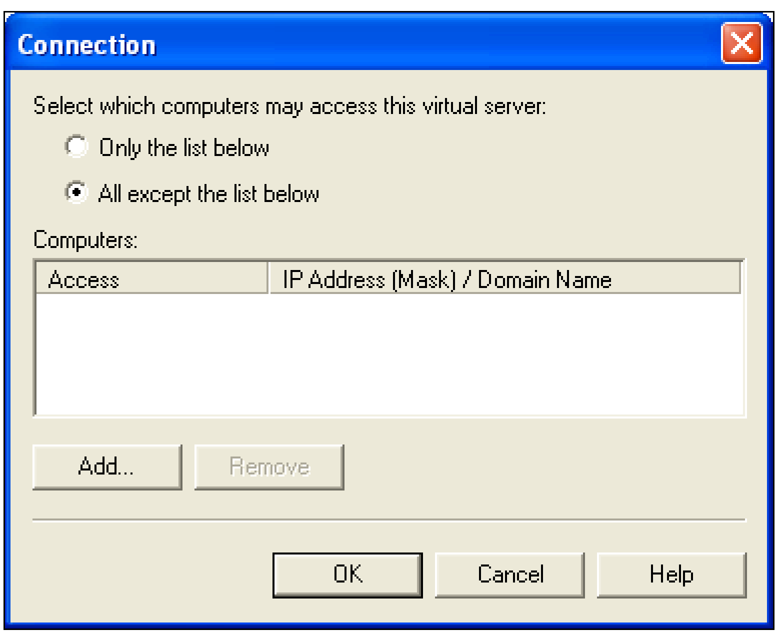

11. Click **Authentication**. The Authentication view appears.




12. Select **Anonymous access**
13. Click **OK**. The Default SMTP Virtual Server Properties view appears.

Under Access tab:

14. Click **Connection**. The Connection view appears.

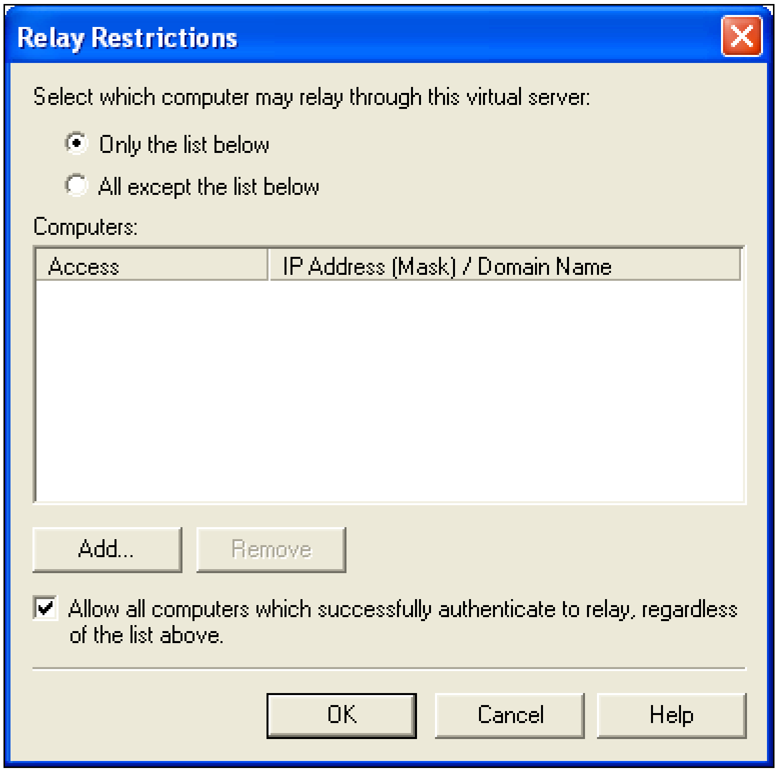


15. Select **All except the list below**.
16. Click **OK**. The Default SMTP Virtual Server Properties view appears.

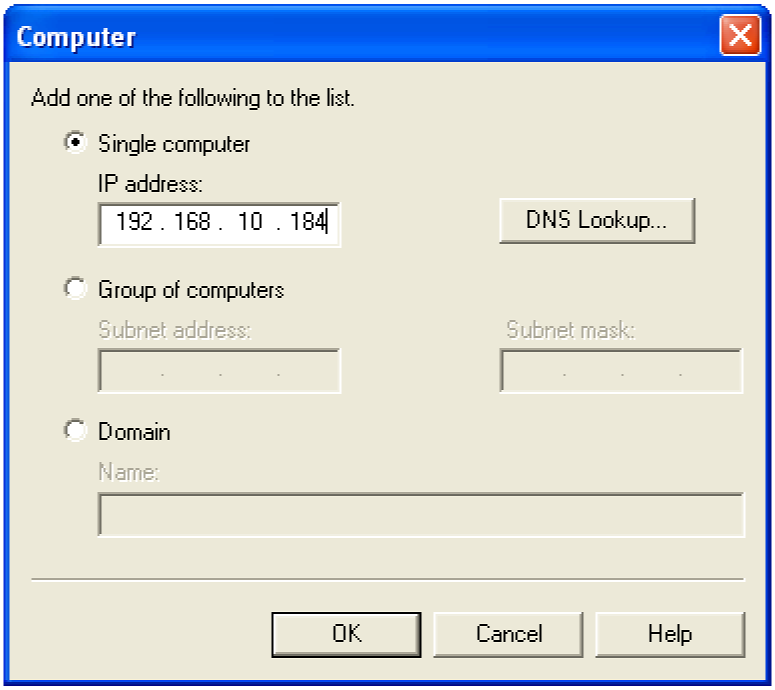
***Note:*** To exclude an IP address from accessing this virtual server, add the IP address which is to be excluded.

Under Access tab:

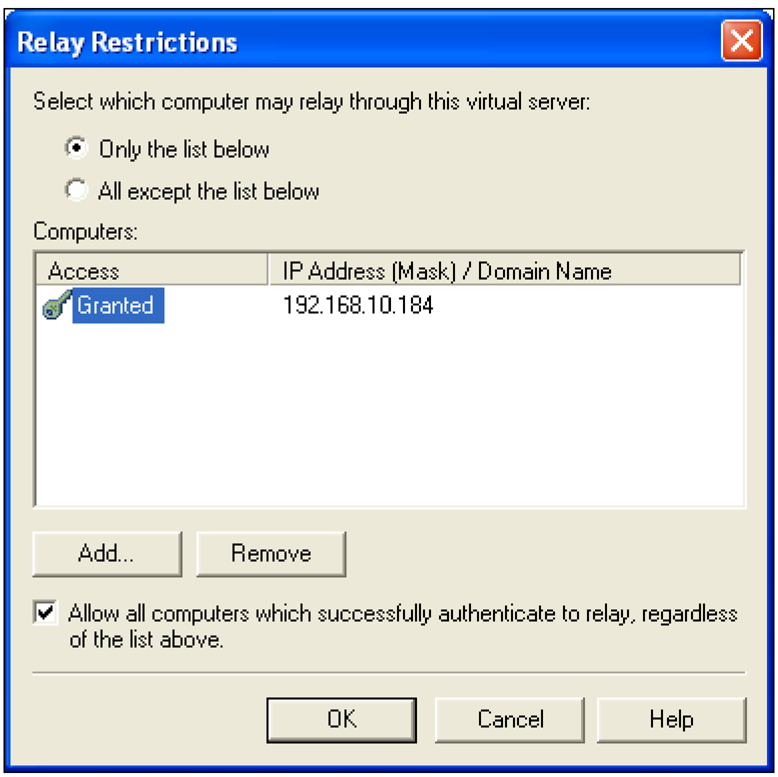
17. Click **Relay**. The Relay Restrictions view appears.




18. Select **Only the list below**.
19. Click **Add**. The Computer view appears.




20. Enter the same IP address as in email configuration view under configuration manager of @Par menu for Single Computer or Group of computers or Domain.
21. Click **OK**. The Relay Restrictions view appears with a list of newly added IP address.




22. Click **OK**. The Default SMTP Virtual Server Properties view appears.
23. Click **OK**.

***Note:*** In Email Configuration of Configuration Manager, under SMTP Authenticate, select **cdoAnonymous** and **SSL enabled** as **No**

***Note:*** To check the email configuration accuracy, Navigate to any report and send it by email.


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