DIGISTAT® Stock Management

DIGISTAT® Version 4.3

User Manual

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Contents

Contents **3**
1. Stock Management **9**
1.1. Introduction 9
1.2. The system modules 9
1.3. How to select a module 13
1.4. Screen structure 14
1.4.1. Header 15
1.4.2. Filters 15
1.4.3. Data area 17
1.4.4. Command bar 17
1.5. Resources' optimistic management 17
2. Stock monitoring **18**
2.1. Stock monitoring: screen structure 18
2.1.1. Filters 19
2.1.2. Data area 19
2.1.3. Command bar 20
2.1.4. Print documentation 21
3. Materials transfer **23**
3.1. Materials transfer - screen structure 23
3.1.1. Source and destination stockroom selection 24
3.1.2. Data area 24
3.1.3. The command bar of the "Materials transfer" screen 26
3.2. Editing the resource data 27
3.2.1. Specifying the resource quantity 28
3.3. How to record the materials transfer 29
3.3.1. Manual recording 29
3.4. Materials transfer - barcode procedure 33
3.4.1. Lock scan 33
3.4.2. Start scan 35
3.4.3. Import 36
4. Expired resources management **38**
4.1. Expired resources management - screen structure 38
4.1.1. Filters 39
4.1.2. Data area 39

4.1.3. The command bar of the “Expired” screen 42
4.2. Editing the screen contents 42
4.2.1. How to change the expiration date 43
4.2.2. How to delete an item from the list 46
5. Administrative discharge 47
5.1. “Administrative discharge” - screen structure 47
5.1.1. Filters 48
5.1.2. Data area 49
5.1.3. The “Administrative discharge” screen command bar 50
5.2. How to record the resource discharge 51
5.2.1. How to insert a note 52
6. Movements summary 54
6.1. “Movements summary” - screen structure 55
6.1.1. Filters 55
6.1.2. Data area 55
6.1.3. The command bar of the “Movements” screen 57
6.2. How to display the list of movements 58
7. Cost center for resource picking 59
7.1. Cost center: screen structure 60
7.1.1. Filters 60
7.1.2. Data area 61
7.1.3. The command bar of the “Cost center selection for picking” screen 62
7.2. Cost center for picking selection procedure 63
7.2.1. “Recent” cost centers 65
8. Resource picking 66
8.1. “Picking” screen description 67
8.1.1. Filters 67
8.1.2. Data area 67
8.1.3. The “resource picking” screen command bar 69
8.2. Resource data editing 70
8.2.1. Specifying the resource quantity 71
8.3. How to record the resource picking 71
8.3.1. Manual procedure 72
8.4. Barcode picking procedure 75
8.4.1. Lock scan 75
8.4.2. Start scan 77

8.4.3. Import ... 78
9. Cost center selection for return ... 80
9.1. Cost Center - screen structure ... 81
9.1.1. Filters ... 81
9.1.2. Data area ... 82
9.1.3. The command bar of the “Cost center for returns” screen ... 83
9.2. Cost center for returns selection procedure ... 84
9.2.1. “Recent” cost centers ... 86
9.3. “Cost center for returns” screen description ... 87
9.3.1. Filters ... 87
9.3.2. Data area ... 87
9.3.3. The “Cost center for returns” screen command bar ... 88
9.4. How to record a “Return” ... 89
9.4.1. Barcode reading for the “Return” procedure ... 89
10. Resources allocation ... 91
10.1. Resources allocation - screen structure ... 92
10.1.1. Source and destination specification ... 92
10.1.2. Data area ... 93
10.1.3. The command bar of the “Resources allocation” screen ... 94
10.2. How to change the resource allocation ... 95
11. Orders sheet print ... 98
11.1. “Orders” - screen structure ... 98
11.1.1. Filters ... 98
11.1.2. Data area ... 99
11.1.3. The command bar of the “Orders” screen ... 100
11.2. How to display and print the orders sheet ... 101
12. Operation attribution of returned resources ... 103
12.1. Operation list - Screen description ... 103
12.2. Operation selection ... 106
12.3. “Returns from operation”: screen structure ... 107
12.3.1. Filters ... 107
12.3.2. Data area ... 107
12.3.3. The command bar of the “Returns from operation” screen ... 108
12.4. How to record the returned resources ... 109
12.4.1. Barcode reading in the “Return” procedure ... 109
12.5. Returned resources from unknown operation ... 110

12.6. Display all the picked resources 111
13. Waste management 113
13.1. List of operations - Screen description 113
13.2. Operation selection 116
13.3. Wasted materials management: screen structure 117
13.3.1. Filters 117
13.3.2. Data area 117
13.3.3. The command bar of the “Waste” screen 118
13.4. How to record a “waste” 119
13.4.1. Use of barcode reader in the “Waste” recording procedure 120
13.5. Waste for unknown operation 120
13.6. Display all pickings 122
14. Operation kit setup procedure 124
14.1. “Kit setup” - Screen structure 125
14.1.1. Filters 125
14.1.2. Data area 125
14.1.3. Command bar 127
14.2. Kit validation procedure 128
14.2.1. Kit editing 131
14.3. The “Kit creation” sheet 132
14.4. Kit creation for an operation 134
14.5. Kit creation screen description 135
14.5.1. Header 135
14.5.2. Data area 136
14.5.3. The command bar 137
14.6. How to record the resource picking for kit composition 138
14.6.1. Manual procedure 139
14.6.2. Barcode procedure 140
14.6.3. Lock scan 141
14.6.4. Start scan 143
14.6.5. Import 144
14.6.6. The “View all” option 145
14.6.7. Quick resource quantity recording 145
14.7. Possible exceptions 146
14.8. Completing the kit resources recording procedure 147
15. Return from kit 149

15.1. Screen structure 150
15.1.1. Operation selection - Filters 150
15.1.2. Operation selection - Data area 150
15.1.3. Operation selection - Command bar 151
15.2. “Operation kits give back” screen description 152
15.2.1. How to record the “Returns” 153
15.2.2. Barcode reading for the “Return” procedure 154
16. Generic kits management procedures 156
16.1. “Generic kit management” - Screen structure 157
16.1.1. Filters 157
16.1.2. Data area 158
16.1.3. Command bar 159
16.2. How to create a new generic kit 160
16.2.1. Generic kit creation screen description 168
16.2.2. Kit resources recording procedures 172
16.3. How to return a generic kit 173
16.4. How to transfer a generic kit 177
16.5. How to display the kit details 180
17. Associating a generic kit to an operation 182
18. Generic kit association to an emergency operation 188
19. Materials requests management 190
19.1. “Requests management” - Screen structure 190
19.1.1. Filters 191
19.1.2. Data area 191
19.1.3. The command bar 193
19.2. How to create a new request 194
19.3. How to edit an existing request 196
19.4. How to delete an existing request 197
19.5. How to display the deatils of a request 199
19.6. How to fill a request 199
20. Resources list for emergencies 202
20.1. How to display the resources list for an operation 202
21. Inventory management 205
21.1. Inventory: screen structure 206
21.1.1. Filters 206
21.1.2. Data area 206

21.1.3. The “Inventory” screen command bar 208
21.2. Editing the inventory values 209
21.2.1. How to change the quantities in stock..... 209
21.2.2. Deleting an inventory item 211
21.3. Refill resource procedure..... 212
21.4. Print inventory 214
22. Search functionalities..... 215
22.1. Search fields 216
22.1.1. How to search for a resource..... 216
22.2. Results 217
22.3. The command bar 217
22.3.1. Print label for the selected resource 219
22.4. Search by position 220
24. Contacts..... 222

1. Stock Management

For general and detailed information about the DIGISTAT® environment and the instruction for use of the Control Bar software see the document "DIG UD CBR IU 0005 ENG V01 - Digistat Control Bar User Manual".

1.1. Introduction

The DIGISTAT® "Stock Management" system offers a set of tools dedicated to the satellite stockrooms and not centralized pharmacies management of a clinical structure.
The system, composed by several different modules, covers all the tasks and necessities relating to this specific environment.

Specifically, the "Stock Management" system covers the following work-areas:

- stock monitoring;
- materials transfer management;
- expired resources management;
- administrative discharge management;
- resource picking process management;
- returned resources (returns) management;
- picked resources and returns attribution to the correct cost center or operation;
- resources allocation management;
- order sheets creation and print;
- waste management;
- materials requests management;
- resources inventory management;
- operating kit creation, use and return management;
- generic kits creation, use and return management;
- quick retrieval and printing of the resources list for urgent operations;

1.2. The system modules

The system, in the configuration described in this manual, is formed of the following modules:

- **Stock** - Stock monitoring.

The corresponding icon on the lateral bar is

. This module is described in paragraph 2 of this manual.

- **Material transfer** - Resources transferral from one stockroom to another.

The corresponding icon is

. This module is described in paragraph 3.

- **Expirations** - Management of resources either expired or near-to-expiration.

The corresponding icon is

. This module is described in paragraph 4.

- **Other pickings** - Administrative discharge management.

The corresponding icon is

. This module is described in paragraph 5.

- **Movements** - Summary of all the movements of resources.

The corresponding icon is

. This module is described in paragraph 6.

- **Cost center picking** - Cost center attribution for resources picking.

The corresponding icon is

. This module is described in paragraph 7.

- **Resources picking** - Management of the resources picking procedures.

This screen can be accessed from the “Cost center picking” module (paragraph 7), after the relevant cost center has been selected. The procedures relating to the resources picking are described in paragraph 8.

- **Cost center return** - Cost center attribution for the resources returned.

The corresponding icon is

. This module is described in paragraph 9.

- **Resources allocation** - Recording of the changes in the resources allocation.

The corresponding icon is

. This module is described in paragraph 10.

- **Orders -** this module makes it possible to create and print the orders sheet

The corresponding icon is

. This module is described in paragraph 11.

- **Returns** - Returned resources management.

The corresponding icon is

. This module is described in paragraph 12.

- **Waste** - Wasted resources management.

The corresponding icon is

. This module is described in paragraph 13.

- **Kit setup** - Aid in the kit preparation procedure.

The corresponding icon is

. This module is described in paragraph 14.

- **Returned resources from kit** - Recording of the unused resources returned from the operating kits.

The corresponding icon is

. This module is described in paragraph 15.

- **Generic kits** - Generic kits creation and management procedures.

The corresponding icon is

. This module is described in paragraph 16.

- **Generic kit link** - This procedure makes it possible to link a generic kit to a specific operation (described in paragraph 17).

- **Generic kits for emergencies** - This procedure makes it possible to link a generic kit to an emergency operation.

The corresponding icon is

. This module is described in paragraph 18.

- **Requests** - Materials requests procedures management.

The corresponding icon is

. This module is described in paragraph 19.

- **Emergencies** - Quick creation and print of the resources list for the emergency operations.

The corresponding icon is

. This module is described in paragraph 20.

- **Inventory** - Inventory management.

The corresponding icon is

. This module is described in paragraph 21.

- **Search** - Resources and materials search functionalities.

The corresponding icon is

. This module is described in paragraph 22.

1.3. How to select a module

To select one of the modules

- ➢ click the corresponding icon on the lateral bar (Fig 1).

Fig 1

The icon appears highlighted yellow. The page relating to the selected module is displayed.

1.4. Screen structure

The screens of the different modules of the system have different appearances and functionalities but always maintain the same structure.

This paragraph shows, using a sample screen, the items forming the screen structure.

These items are:

- the header (Fig 2 **A**);
- the selection filters (Fig 2 **B**);
- the data area (Fig 2 **C**);
- the command bar (Fig 2 **D**).

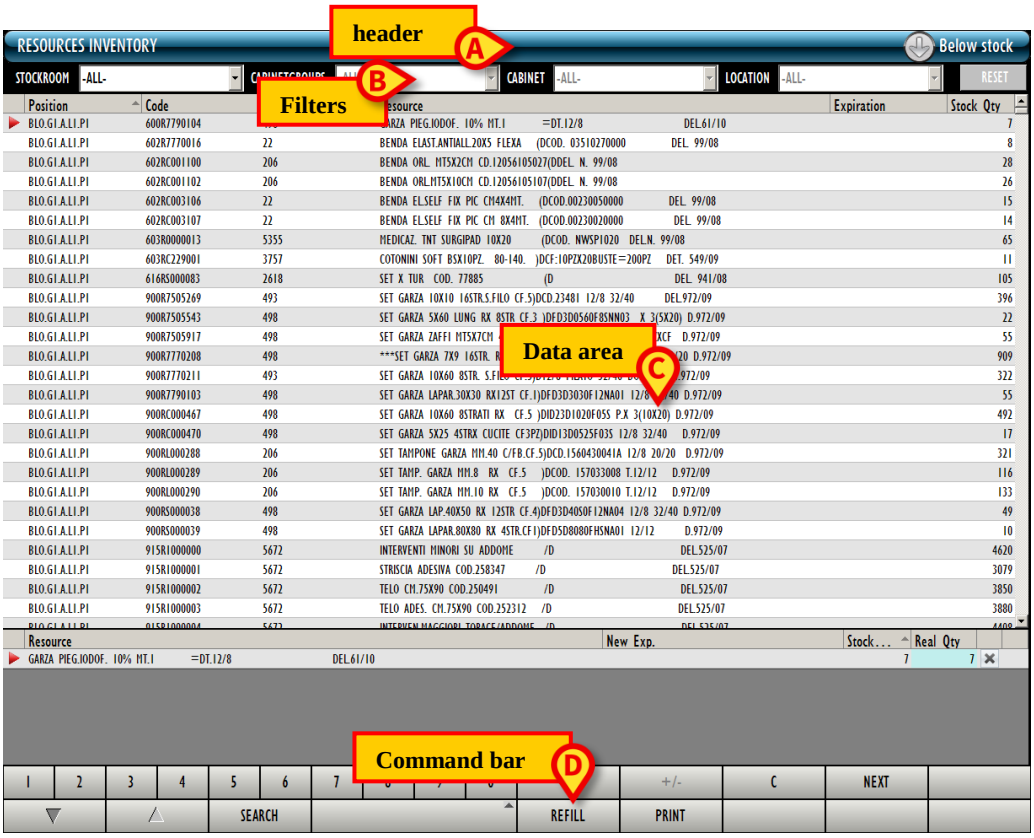


Fig 2

1.4.1. Header

A blue bar is on top of every screen. On the left of the bar a header specifies the function and contents of the screen currently displayed (Fig 3 **A**). On the right three icons are displayed, if enabled by configuration, providing information on the state of the resources in stock (Fig 3 **B**).

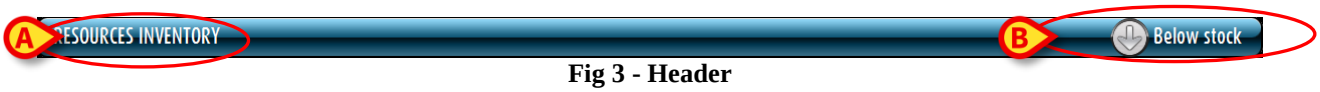


Fig 3 - Header

The icon indicates that there are resources expired still in stock.

The icon indicates that there are resources close to expiration in stock.

The icon indicates that there are resources under stock (i.e. less resource units than required).

Some configurations do not manage the resouces expiration dates. In these cases the first two icons cannot appear.

1.4.2. Filters

Under the header bar there are various filters making it possible to select the items displayed on screen.

The number and kind of filters change on the different screens according to the functionalities of the specific module currently selected.

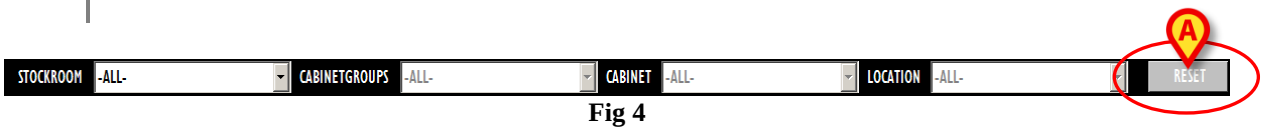


Fig 4

To use the filters

- click the button placed near the filter.

A menu containing the available options opens.

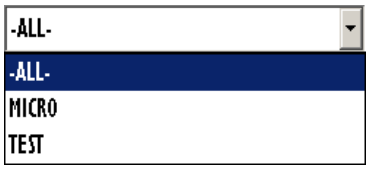


Fig 5

- Click the wanted option.

The name of the selected filter appears in the field. The list of items displayed on screen changes accordingly.
The **Reset** button on the right (Fig 4 **A**) clears all the filters and displays the items full list.

1.4.2.1. Date filter

A date filter is available in various contexts. Fig 6 shows an example.

Fig 6

To set a date

- click the button placed near the date (Fig 6 **A**).

A calendar-window opens (Fig 7).

Fig 7

- Use the and buttons to select the month (Fig 7). Click the button to select the preceding month. Click the button to select the following month.

- Click the number corresponding to the day that must be selected.

The date this way selected is displayed in the field.

1.4.3. Data area

The data area (Fig 2 **C**) displays the contents of the different screens. These contents will be described contextually, with the relating module.

1.4.4. Command bar

The command bar (Fig 2 **D**) contains the buttons making it possible to perform the procedures relating to the module selected. The different command bars will be described contextually, with the different modules.

1.5. Resources' optimistic management

In the "Stock Management" system the phrase "Resources optimistic management" indicates that the resources expiration date editing is enabled.
The "Optimistic management" can be enabled by configuration.
This procedure makes it possible to manage the expiration date of certain resources. For instance, it can be applied to resources that are used often and in large amounts, for which the lot, serial number and expiration date specification is not strictly necessary. A generic expiration date is indicated for these resources, that is the nearest among all the existing expiration dates. This guarantees that no expired resources will be used, but it is this way possible for a resource to be labelled as expired or near-to-expiration when it is not. In these cases a new expiration date can be specified by the user.

2. Stock monitoring

The functionalities relating to stock monitoring are performed on the “Stock” module. To access this module

- click the

button on the lateral bar.

The following screen opens.

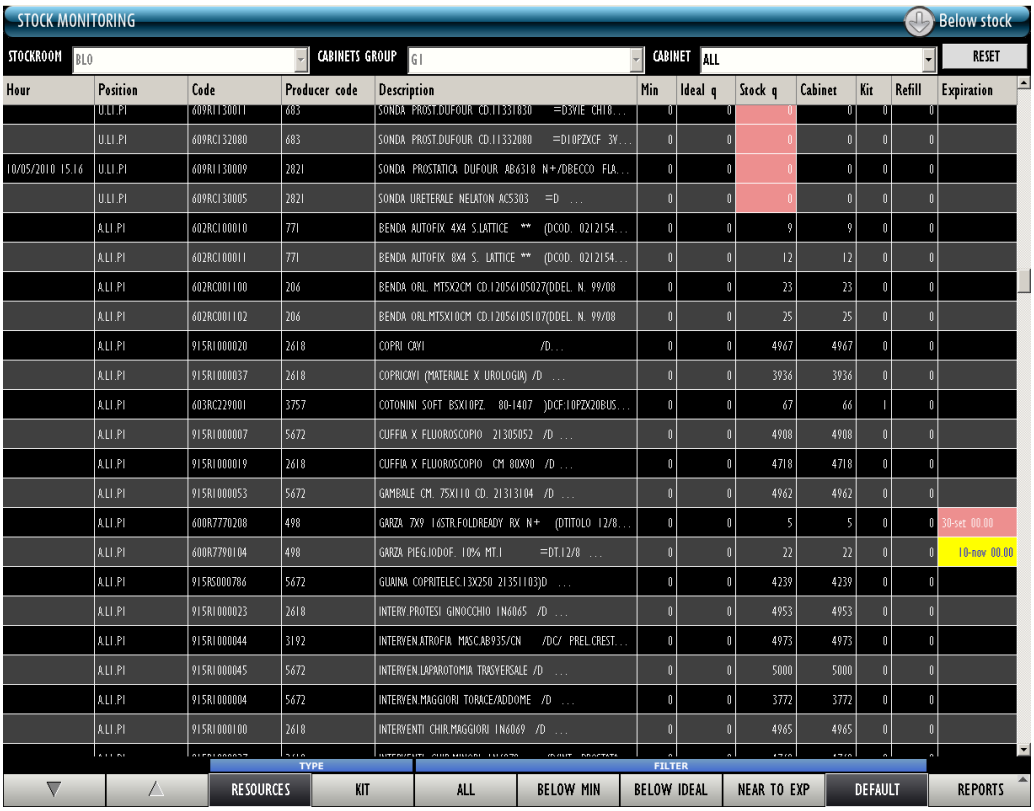


Fig 8 - Stock monitoring

2.1. Stock monitoring: screen structure

The stock monitoring screen is structured according to the general description offered in paragraph 1.4. See paragraph 1.4 for a description of the screen general features. The present paragraph describes the screen specific features.

2.1.1. Filters

Fig 9 - "Stock monitoring" screen filters

These are the filters available on this screen:

- "Stockroom" - Makes it possible to display only the resources that are in a specific stock room.
- "Cabinet group" - Makes it possible to display only the resources that are in a specific cabinet group.
- "Cabinet" - Makes it possible to display the resources that are in a specific cabinet.

See paragraph 1.4.2 for a general description of the filters used within the "Stock Management" system.

2.1.2. Data area

The data area of the "Stock Monitoring" screen makes it possible to display the list of all the resources uploaded in the system.

Each row corresponds to a resource (Fig 10).

Hour	Position	Code	Producer code	Description	Min	Ideal q	Stock q	Cabinet	Kit	Refill	Expiration
	U.L1.P1	616RC000104	3796	SET MALECOT CD.410-103 24 FR.35 =DPOST NEFROS...	0	0	0	0	0	0	
	U.L1.P1	609R1130011	683	SONDA PROST.DUFOUR CD.11331830 =D3VIE CH18...	0	0	0	0	0	0	
	U.L1.P1	609RC132080	683	SONDA PROST.DUFOUR CD.11332080 =D10PZXCF 3V...	0	0	0	0	0	0	
10/05/2010 15.16	U.L1.P1	609R1130009	2821	SONDA PROSTATICA DUFOUR AB6318 N+/DBECCO FLA...	0	0	0	0	0	0	
	U.L1.P1	609RC130005	2821	SONDA URETERALE NELATON AC5303 =D ...	0	0	0	0	0	0	
	A.L1.P1	602RC100010	771	BENDA AUTOFIX 4X4 S.LATTICE ** (DCOD. 0212154...	0	0	9	9	0	0	
	A.L1.P1	602RC100011	771	BENDA AUTOFIX 8X4 S. LATTICE ** (DCOD. 0212154...	0	0	12	12	0	0	
	A.L1.P1	602RC001100	206	BENDA ORL MT5X2CM CD.12056105027(DDEL. N. 99/08	0	0	23	23	0	0	
	A.L1.P1	602RC001102	206	BENDA ORL MT5X10CM CD.12056105107(DDEL. N. 99/08	0	0	25	25	0	0	
	A.L1.P1	915R1000020	2618	COPRI CAVI /D...	0	0	4967	4967	0	0	
	A.L1.P1	915R1000037	2618	COPRICAVI (MATERIALE X UROLOGIA) /D...	0	0	3936	3936	0	0	

Fig 10 - Stock monitoring

For each resource the following information is displayed:

- **Hour** - Time of the latest "under stock" alarm generated by the resource.
- **Position** - Resource position. Indication of the resource location.
- **Code** - Resource code.
- **Producer** - Manufacturer code.
- **Description** - Resource description.

- **Min** - Minimum suggested quantity, set by configuration, of resources of a kind that should be in stock.
- **Ideal quantity** - Ideal suggested quantity, set by configuration, of resources of a kind that should be in stock.
- **Stock quantity** - Quantity in stock. If the quantity in stock is below the minimum quantity, the cell is highlighted pink. If the quantity in stock is below the ideal quantity the cell is highlighted yellow.
- **Cabinet** - amount of resources located in the cabinets.
- **Kit** - amount of resources located in the generic kits already prepared.
- **Refill** - Suggested quantity of resource that must be acquired.
- **Expiration** - Expiration date. If the expiration date is near (proximity is defined by configuration) the cell is highlighted yellow. If the resource is expired the cell is highlighted pink.

Some "Stock Management" configurations do not manage the resources expiration. In these cases no information is displayed in the "expiration" field.

For each resource can be specified either all or part of the possible information, depending on the resources configuration.

2.1.3. Command bar

The command bar (Fig 11) contains the buttons making it possible to change the way the items on screen are displayed.

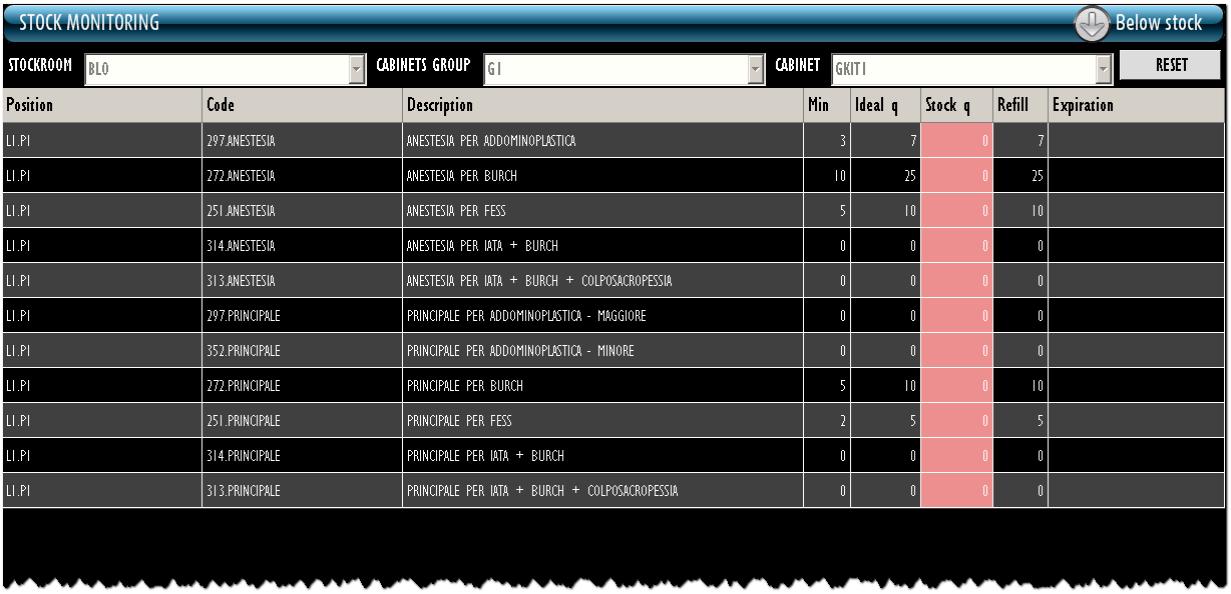
Fig 11 - Stock monitoring: command bar

Use the arrows and to scroll the screen content up and down.

The buttons placed under the blue bar named "TYPE" (Fig 12) can be used to select the kind of items displayed on screen.

Fig 12

If the **Resources** button is selected the screen displays the list of all the resources configured in the system.
If the **Kit** button is selected the screen displays the list of all the possible generic kits (Fig 13).



Position	Code	Description	Min	Ideal q	Stock q	Refill	Expiration
L1.P1	297.ANESTESIA	ANESTESIA PER ADDOMINOPLASTICA	3	7	0	7	
L1.P1	272.ANESTESIA	ANESTESIA PER BURCH	10	25	0	25	
L1.P1	251.ANESTESIA	ANESTESIA PER FESS	5	10	0	10	
L1.P1	314.ANESTESIA	ANESTESIA PER IATA + BURCH	0	0	0	0	
L1.P1	313.ANESTESIA	ANESTESIA PER IATA + BURCH + COLPOSACROPESSIA	0	0	0	0	
L1.P1	297.PRINCIPALE	PRINCIPALE PER ADDOMINOPLASTICA - MAGGIORE	0	0	0	0	
L1.P1	352.PRINCIPALE	PRINCIPALE PER ADDOMINOPLASTICA - MINORE	0	0	0	0	
L1.P1	272.PRINCIPALE	PRINCIPALE PER BURCH	5	10	0	10	
L1.P1	251.PRINCIPALE	PRINCIPALE PER FESS	2	5	0	5	
L1.P1	314.PRINCIPALE	PRINCIPALE PER IATA + BURCH	0	0	0	0	
L1.P1	313.PRINCIPALE	PRINCIPALE PER IATA + BURCH + COLPOSACROPESSIA	0	0	0	0	

Fig 13

The buttons placed under the blue bar named “FILTERS” (Fig 14) are filters making it possible to select the subset of items displayed on screen.

Fig 14 - Filters

The **All** button, when selected, displays all the items.
The **Below Min.** button displays only those items having a lower stock quantity than that indicated as minimum in the “Min” column.
The **Below Ideal** button displays only those items having a lower stock quantity than that indicated as ideal in the “Max” column.
The button displays the items that are close to expiration (expiration proximity is defined by configuration).

The

button displays a default modality, chosen by configuration.

The

button makes it possible to access the module’s print functionalities. See paragraph 2.1.4 for a description of these functionalities.

2.1.4. Print documentation

To access the system’s print functionalities

- click the

button on the command bar.

A selection menu opens, making it possible to choose the kind of document to be printed (Fig 15).

Fig 15 - Possible reports

It is possible to print:

- the main stockroom resources list,
- the manufacturers list,
- the complete list of the items displayed,
- the “picked resources” list,
- the “refill” list.

When the kits list is displayed only the “Print Screen” and “Refill list” screens options are enabled.

➢ Click the button corresponding to the wanted option.

A print preview is displayed.

3. Materials transfer

The “Materials transfer” module makes it possible to record the transfer of materials and resources from one stockroom to another.

To select the module

- click the corresponding icon

.

The following screen opens (Fig 16):

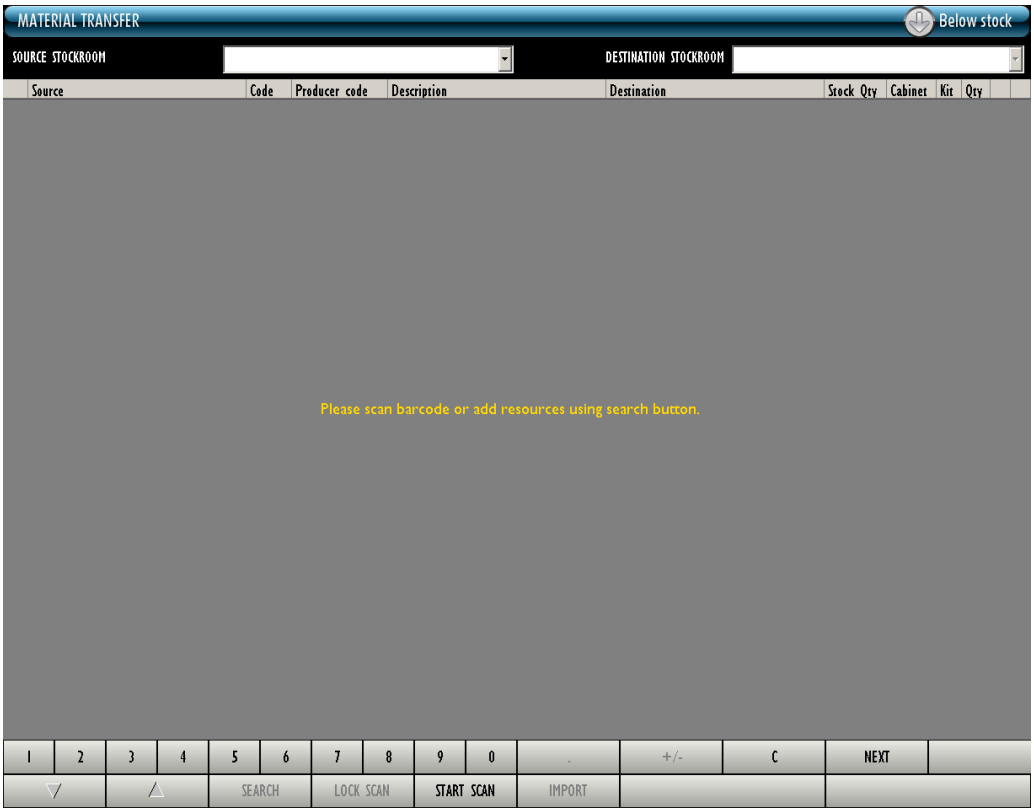


Fig 16 - Materials transfer

3.1. Materials transfer - screen structure

The “Materials transfer” screen is structured according to the general description offered in paragraph 1.4, see this paragraph for the screen general features. The present paragraph describes the screen specific features.

3.1.1. Source and destination stockroom selection

Fig 17 - Filters of the "Materials transfer" screen

The filters available on the "Materials transfer" screen (Fig 17) are:

- "Source stockroom" - It makes it possible to select the stockroom from which the resources that must be transferred come.
- "Destination stockroom" - It makes it possible to select the stockroom to which the resources are transferred.

See paragraph 1.4.2 for instructions on how the filters work.

Both filters must be specified in order to perform the materials transfer.

3.1.2. Data area

The data area of the "Materials transfer" screen contains, once selected, the list of materials to be transferred (Fig 18 **A**).

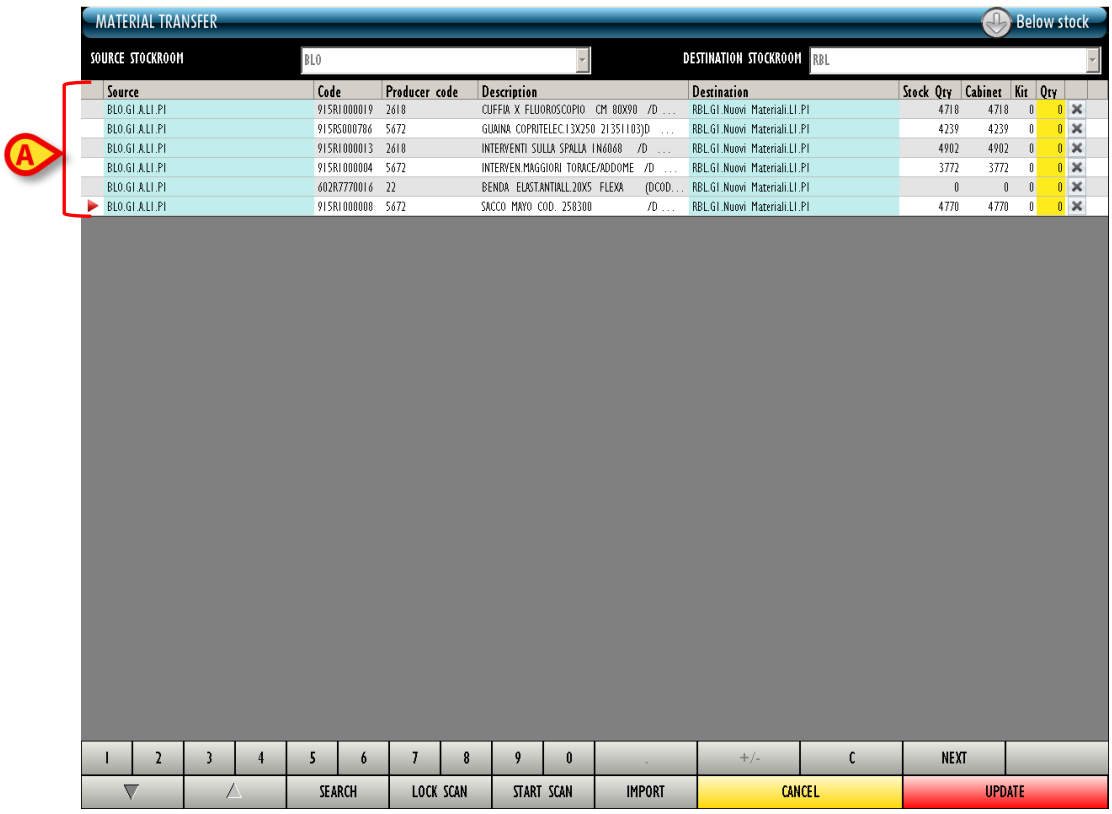


Fig 18 - Materials transfer

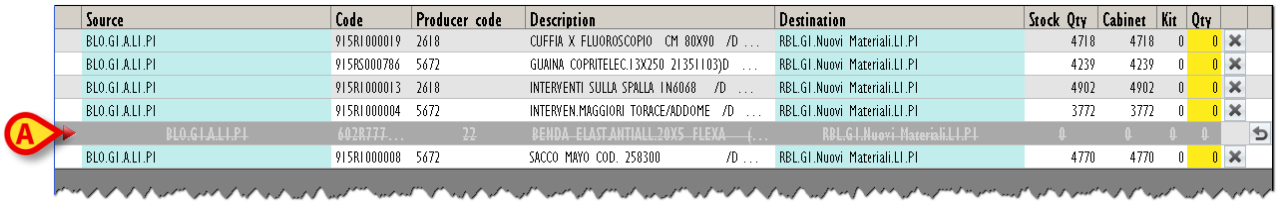
Each row corresponds to a type of resource. For each resource, in this area, the following information is displayed:

- the “source” stockroom (not editable);
- the resource code (not editable);
- the manufacturer code (not editable);
- the resource description (not editable);
- the destination stockroom (user selectable if numerous destinations are possible)
- the resource stock quantity (not editable);
- the amount of resource located in the cabinets (not editable);
- the amount of resource located in the generic kits already prepared (not editable);
- the quantity of resource that must be transferred (editable).

For each resource either all or part of the possible information can be specified, depending on the resources configuration.

The arrow possibly appearing at the beginning of a row indicates the selected resource.

The icon appearing at the end of each row makes it possible to cancel the resource. The cancelled resource appears as in Fig 19 **A**.



Source	Code	Producer code	Description	Destination	Stock Qty	Cabinet	Kit	Qty
BLO.GI.A.LI.PI	915RI000019	2618	CUFFIA X FLUOROSCOPIO CM 80X90 /D ...	RBL.GI.Nuovi Materiali.LI.PI	4718	4718	0	0
BLO.GI.A.LI.PI	915RS000786	5672	GUAINA COPRITELEC.13X250 21351103)D ...	RBL.GI.Nuovi Materiali.LI.PI	4239	4239	0	0
BLO.GI.A.LI.PI	915RI000013	2618	INTERVENTI SULLA SPALLA IN6068 /D ...	RBL.GI.Nuovi Materiali.LI.PI	4902	4902	0	0
BLO.GI.A.LI.PI	915RI000004	5672	INTERVEN.MAGGIORI TORACE/ADDOME /D ...	RBL.GI.Nuovi Materiali.LI.PI	3772	3772	0	0
A BLO.GI.A.LI.PI	602R777...	22	BENDA ELAST.ANTIALL.20X5 FLEXA (...	RBL.GI.Nuovi Materiali.LI.PI	0	0	0	0
BLO.GI.A.LI.PI	915RI000008	5672	SACCO MAYO COD. 258300 /D ...	RBL.GI.Nuovi Materiali.LI.PI	4770	4770	0	0

Fig 19 - Cancelled resource

The resources corresponding to the rows cancelled this way disappear when the screen is updated.

The icon appearing at the end of each row makes it possible to annul the outcomes of the actions recently performed on the corresponding resource; it brings the resource to its original state back (it is an “Undo” button).

The fields highlighted yellow are mandatory. If a user tries to record a resource transfer without specifying one of the mandatory fields, the system stops the procedure and warns the user with a specific pop-up window (Fig 20).

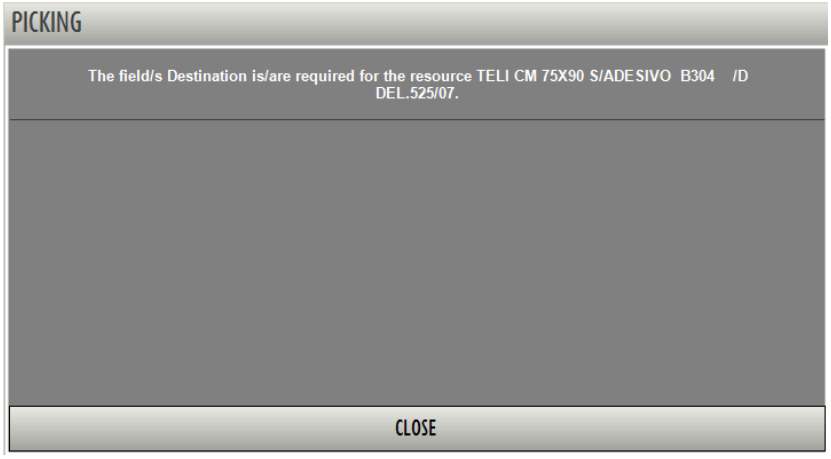


Fig 20

- Click the **Close** button to hide the pop-up.

The nature and kind of mandatory information depend on the resource configuration. When a mandatory field is specified it is highlighted light-blue (Fig 21).

Fig 21

3.1.3. The command bar of the "Materials transfer" screen

The command bar of the materials transfer screen (Fig 22) is formed of several buttons. This paragraph lists briefly the functions of the different buttons, referring to successive paragraphs when more detailed instructions on a specific functionality are necessary.

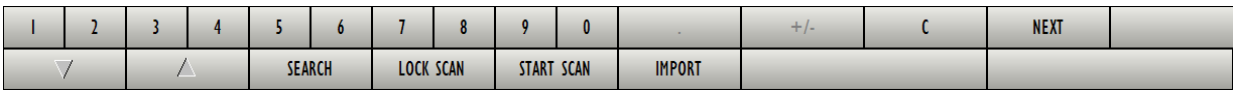


Fig 22 - Command bar

The upper line contains buttons making it possible to manage the numeric data specification.

Fig 23 - Numeric buttons

Use the numeric buttons (Fig 23) to indicate the quantities. Click one of the numbers to write the number in the "Quantity" field.

The " **.** " button is a decimal divider. The button is active only if decimal specification is relevant.
The "+/-" button makes it possible to specify whether a value is negative or positive. The button is active only if negative values specification is relevant.
The " **C** " button brings back to zero the specified quantities.
The **Next** button selects the item following the one currently selected.

Use the arrow buttons ▼ and ▲ to scroll up and down the screen contents in case the items are too many to be displayed all together.

Use the **Search** button to access the system's search functionalities (described in paragraph 22). Click this button to open the screen shown in Fig 29.

Use the **Lock Scan** button to lock the workstation while reading numerous barcodes that will be recorded all together afterwards. See paragraph 3.4.1 for a description of the related procedures.

Use the **Start Scan** button to begin the reading of numerous barcodes that will be recorded later, all at the same time. See paragraph 3.4.2 for the instructions relating to this procedure.

Use the **Import** button to import the selected items using a wireless barcode reader having internal memory. See paragraph 3.4.3 for the instructions relating to this option.

When editing the screen contents the **Update** and **Cancel** buttons appear on the command bar.

The **Update** button saves the changes made. After every editing of the screen contents it is necessary to click the **Update** button to save the changes.

The **Cancel** button annuls all the changes made.

3.2. Editing the resource data

The information regarding a resource can, in certain cases, be edited by the user.

The nature and kind of editable information depend on the way the resource is configured. Editable information is highlighted either yellow or light-blue on the row corresponding to the resource.

To edit the resource data

- click the field containing the information you wish to change.

The button appears in the field (Fig 24 **A**).

- Click the button.

A menu containing the possible options opens (Fig 24 **B**).

Fig 24

- Click the wanted option.

The option is displayed in the field. The available options on the different menus depend on the context. For example: the "position" field will display all and only the positions in which the resource can be found. Selecting an option affects the available choices in the other fields.

On the "Materials Transfer" screen described in this paragraph, the destination stockroom selection is available if the selected resource can be located in more than one stockroom.

3.2.1. Specifying the resource quantity

To specify the quantity of resource that must be transferred

- select the row corresponding to the resource.

The selected row is indicated by the arrow (Fig 25 **A**).

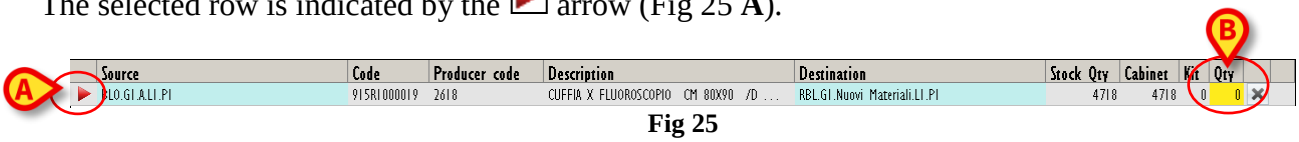


Fig 25

- Specify the new quantity using the numeric buttons on the command bar (Fig 26)

Fig 26 - Numeric buttons

Otherwise you can

- click the cell indicating the "Quantity" (Fig 25 **B**).

The quantity is highlighted.

- Set the new quantity using either the workstation keyboard or the numeric buttons on the command bar.

3.3. How to record the materials transfer

The materials transfer can be recorded either manually or using a barcode reader. The different procedures are described in the following paragraphs.

> **!** ***Barcode technology is recommended when selecting an item. Scanning the item's barcode, instead of selecting it manually, helps the user to diminish selection errors.***

3.3.1. Manual recording

To record the material transfer manually

- select the "source" stockroom (Fig 27 **A**).
- Select the "destination" stockroom (Fig 27 **B**)

Fig 27

- click the **Search** button on the command bar (Fig 28).

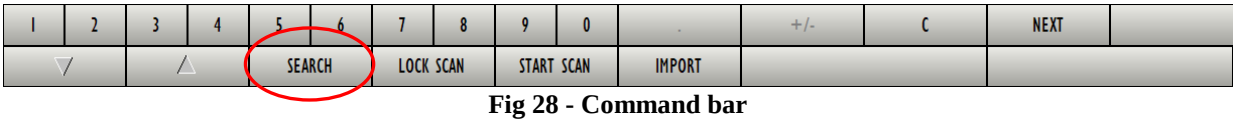


Fig 28 - Command bar

The "Search" screen opens (Fig 29). This screen is described in paragraph 22.

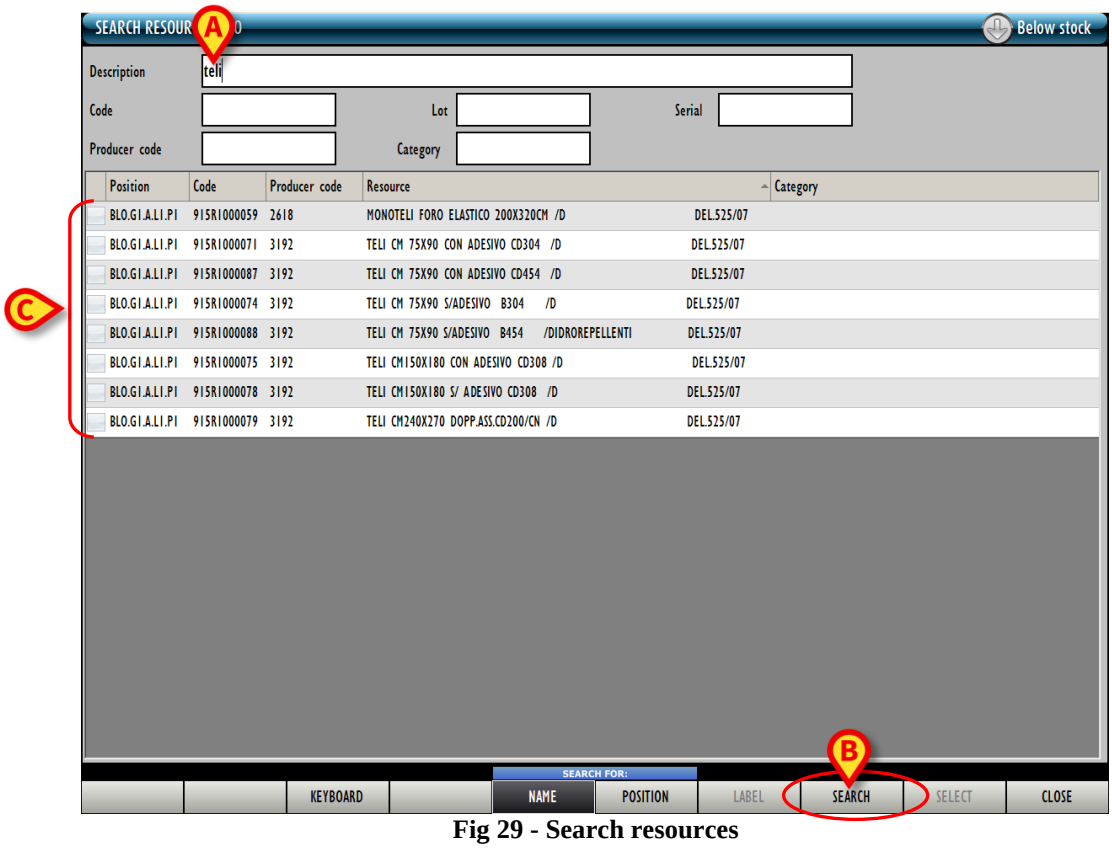


Fig 29 - Search resources

- Insert the available information on the resource in the search fields (Fig 29 **A**).
- Click the **Search** button on the command bar (Fig 29 **B**).

The list of resources corresponding to the information specified is displayed on screen (Fig 29 **C**).

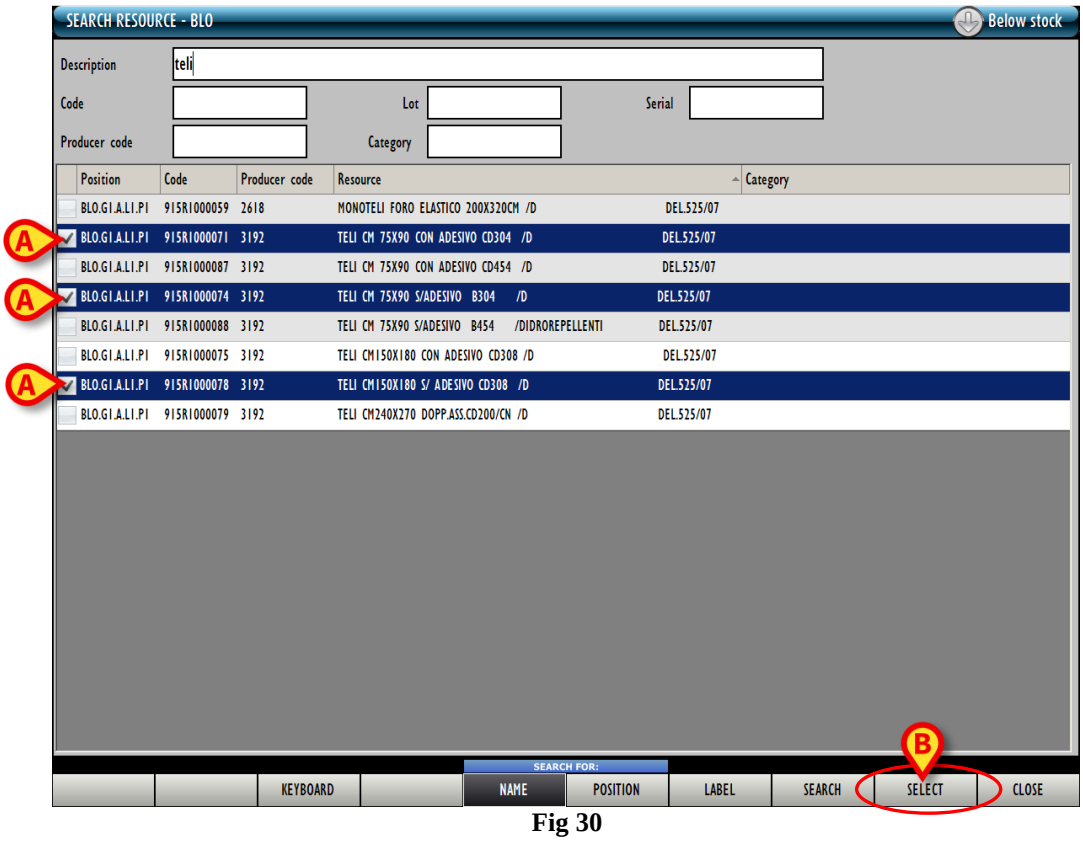


Fig 30

- Click the relevant item/s on the list. Multiple selection can be enabled by configuration.

The corresponding line/s is/are highlighted (Fig 30 **A**).

- Click the **Select** button on the command bar (Fig 30 **B**).

The resource/s this way selected appears in the “materials transfer” screen (Fig 31 **A**).

Double click an item to display it directly.

Fig 31

- Set, if necessary, the resource values (destination, quantity, etc… see for instructions paragraph 3.2).
- Repeat, if necessary, the procedure to add other resources.
- Click the **Update** button on the command bar.

The resources transfer is this way recorded.

3.4. Materials transfer - barcode procedure

The resource selection can be performed using a barcode reader. This paragraph describes the procedures related to this functionality.

To record the transfer of materials and resources using barcode reading, when the “Materials transfer” screen is displayed (Fig 16, Fig 31),

- read the barcode of the resource that must be transferred

The rows corresponding to the resources appear on screen.

If a scanned barcode belongs to a resource that is not in the stockroom selected as “source”, a pink row is created to inform the user (Fig 32).

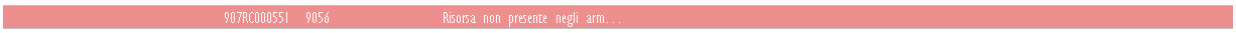


Fig 32 - Resource is not in the stockroom

Specific buttons on the command bar make it possible to launch specific barcode reading procedures. These are described in the following paragraphs.

3.4.1. Lock scan

The **Lock Scan** button on the command bar (Fig 33) makes it possible to lock the workstation while the user reads numerous barcodes that will be read later, all at the same time.

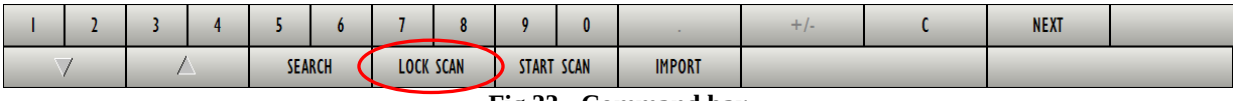


Fig 33 - Command bar

This functionality is used when it is necessary to leave the workstation alone to personally scan the barcodes of several items that are in a different place. This functionality is performed using a wireless barcode reader.

This is the procedure:

- click the **Lock Scan** button.

The button appears selected. The button remains this way while the workstation is locked.

The following window appears on screen (Fig 34).

Fig 34

- Read the barcodes. The workstation is locked to other users.

When barcodes reading is complete,

- insert your password in the field indicated in Fig 34 **A**.
- Click the **Continue** button (Fig 34 **B**).

The workstation is this way unlocked. The rows corresponding to all the barcodes read appear on screen.

The **Keyboard** button on the window opens a virtual keyboard that can be used to insert the password (Fig 35).

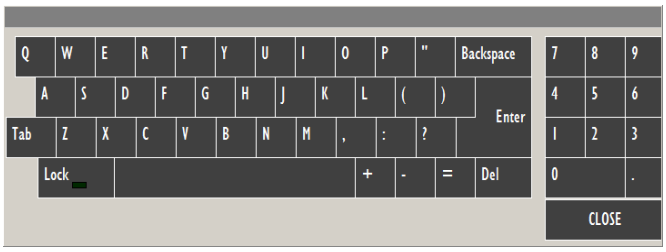


Fig 35 - Virtual keyboard

3.4.1.1. How to force the workstation unlocking

The workstation can be unlocked by another user if his/her permissions level enables him/her to do it.

To force the workstation unlocking

- click the option “Advanced options” on the window that requests password (Fig 36).

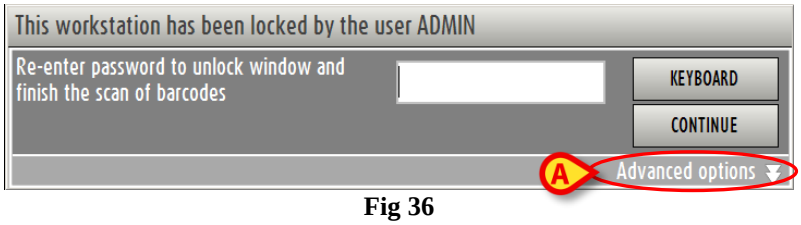


Fig 36

The window changes in the following way (Fig 37).

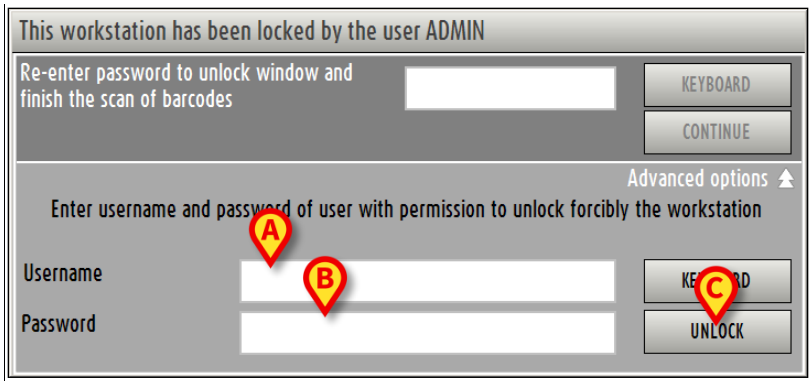


Fig 37 - Advanced options

- Insert the username of the new user in the "Username" field (Fig 37 **A**).
- Insert the password of the new user in the "Password" field (Fig 37 **B**).
- Click the **Unlock** button (Fig 37 **C**).

If the new user has the appropriate permissions the workstation is unlocked.

! *The barcodes read by the original user will **not** be recorded.*

3.4.2. Start scan

The **Start Scan** button on the command bar (Fig 38) makes it possible to read numerous barcodes that will be recorded later all at the same time.

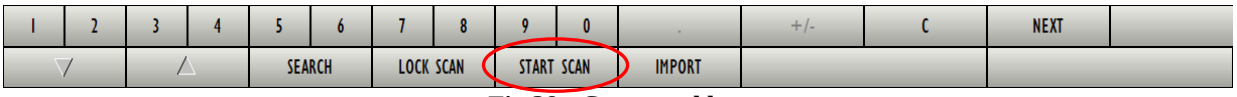


Fig 38 - Command bar

This is the procedure:

- click the **Start Scan** button.

The button changes. It appears as: **Stop Scan**.

A pop-up window informs the user that barcode reading can start (Fig 39).

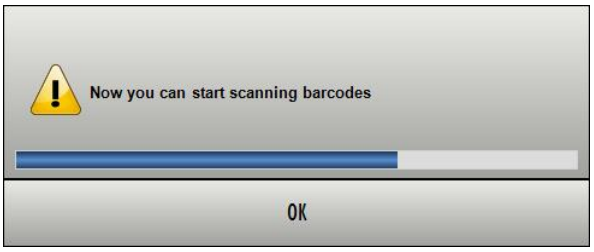


Fig 39

The user is logged out. This happens because the user now probably moves away from the workstation to read the barcodes.

- Read the barcodes.

After barcode reading, to import the data of the scanned resources into the system,

- log in again.
- Click the icon on the lateral bar to select the module “Materials transfer” again.
- Click the **Stop Scan** button.

The rows corresponding to the scanned resources barcodes appear on screen.

While scanning the blue bar on top of the screen displays the following advice “Press STOP SCAN to import the scanned products” (Fig 40).

Fig 40

3.4.3. Import

The **Import** button on the command bar (Fig 41) makes it possible to import into the system the data read with a wireless barcode reader having internal memory.

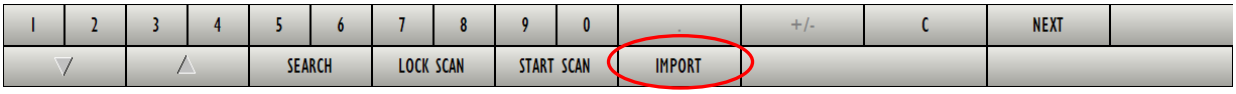


Fig 41 - Command bar

This is the procedure:

- read the barcodes using the appropriate devices, configured to connect to the system.
- Click the **Import** button.

the following windows is displayed, informing the user on the import procedure state.

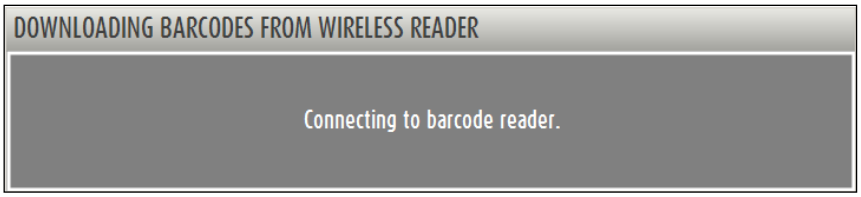


Fig 42

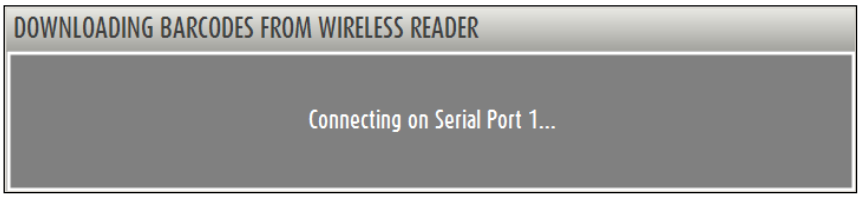


Fig 43

If the procedure succeeds the data are imported. The rows corresponding to the resources scanned appear on screen.

4. Expired resources management

The “Expired” module makes it possible to display and manage the resources either expired or closet o expiration.

To select the module

- click the corresponding icon .

The following screen opens (Fig 44).

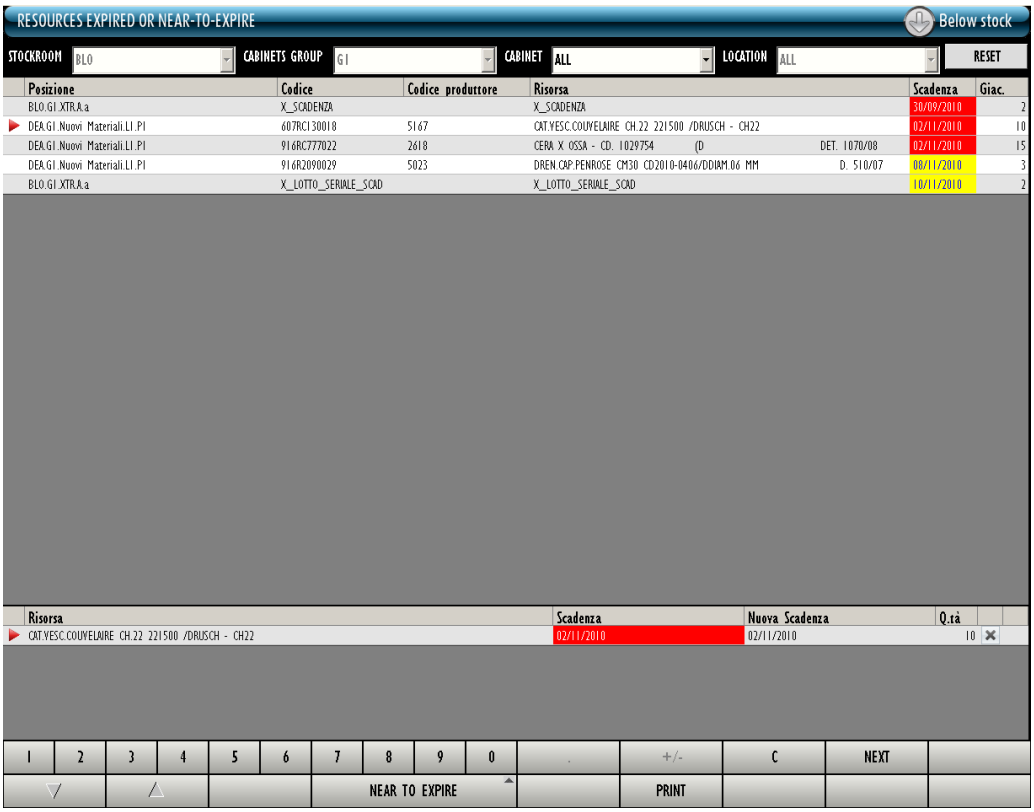


Fig 44 - Expired resources management

4.1. Expired resources management - screen structure

The expired resources management screen is structured according to the general description offered in paragraph 1.4, see this paragraph for the screen general features. The present paragraph describes the screen specific features.

4.1.1. Filters

Fig 45 - Filters on the "Expired resources" screen

The available filters on the "Expired resources" screen (Fig 45) are:

- "Stockroom" - It makes it possible to display all the resources in a specific stockroom.
- "Cabinets group" - It makes it possible to display all the resources in a specific cabinets group.
- "Cabinet" - It makes it possible to display all the resources in a specific cabinet.
- "Location" - It makes it possible to display all the resources in a specific location.

See paragraph 1.4.2 for a general description of the filters in use in the DIGISTAT® "Stock Management" system.

4.1.2. Data area

The data area of the "Expired resources" area is formed of two parts (Fig 46).

Fig 46 - Expired resources

The upper area displays a list of resources (Fig 46 **A**).

The kind of list actually displayed depends on an option selected on the command bar. This procedure is described in the next paragraph “How to select the type of resources display”. The available options are:

- the expired resources;
- the expired and near to expiration resources;
- all the resources.

The current option is indicated on the button shown in Fig 46 **C**.

Each row in the list corresponds to a resource type. For each resource type, on the upper area (Fig 46 **A**), are displayed:

- the resource position (not editable);
- the resource code (not editable);
- the manufacturer code (not editable);
- the resource name (not editable);
- the expiration date (not editable);
- the quantities in stock (both in the cabinets and in the kits - not editable).

The lower area (Fig 46 **B**) displays detailed information on the resource selected in the upper area.

In this area each row corresponds either to a single resource or to a lot of resources, depending on the resource configuration.

For each row the following information is specified:

- the name of the resource (not editable);
- the lot to which it belongs (not editable);
- the serial number (not editable);
- the expiration date (not editable);
- the new expiration date;
- the quantity in stock (both in the cabinets and in the kits - not editable).

For each resource either all or part of the possible information is displayed, depending on the configuration specification.

The ▶ arrow at the beginning of a row indicates the selected resource.

The selection of a row in the upper area displays the resources details in the lower area.
I.e. in the upper area the type of resource is displayed for the specified position, while in the lower area are displayed all the items existing for that kind (these can be items belonging to different lots, single resources having a different expiration date, or groups of items having different expiration dates).

The items displayed in the lower area are those indicated by the button shown in Fig 46 **C**. I.e. these are either “expired”, “near to axpiration” or “all” the resources depending on the option selected on the command bar.

When the quantity in stock for a resource is less than the minimum quantity (indicated by configuration) the corresponding cell is highlighted red; when the quantity in stock for a resource is less than the ideal quantity (indicated by configuration) the corresponding cell is highlighted yellow.

If there are 0 items in stock for a resource, the selection of the corresponding row in the upper part of the screen does not display any item in the lower part of the screen.

If the expiration date is highlighted red it means that the resource is expired.
If the expiration date is highlighted yellow it means that the resource is close to expiration (Fig 47).

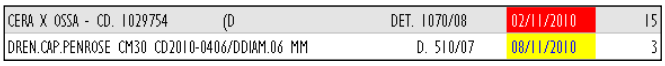


Fig 47 - expired and closet o expiration resources

The icon on the right cancels the corresponding row. The procedure is described in paragraph 4.2.2.

The icon placed at the end of the row is an “Undo” button bringing back the row to its original state.

How to select the type of resources displayed on screen

The button on the command bar shown in Fig 46 **C** makes it possible to select the set of items displayed on screen.

To change the set of items displayed,

- click the button.

The following options appear

Fig 48

The **Expired** option displays only the expired items (the expiration date is highlighted red).
The **Near to Expire** option displays both the expired and the “near to expiration” items (the expiration dates can be highlighted either red or yellow.

The **All** option displays all the configured items.

- Click the wanted option.

The button indicates the selected option. the list of items displayed changes accordingly.

4.1.3. The command bar of the "Expired" screen

The command bar of the "Expired" screen (Fig 49) is formed of several buttons. This paragraph lists briefly the functions of the different buttons, referring to successive paragraphs when more detailed instructions on a specific functionality are necessary.

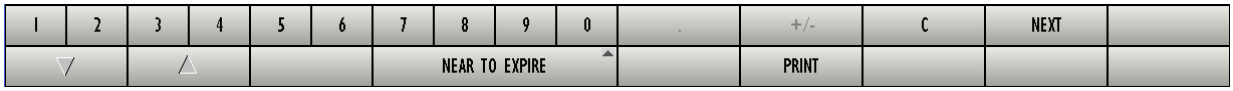


Fig 49 - Command bar

The upper line contains the buttons making it possible to manage the numeric data specification.

Fig 50 - Numeric buttons

Use the numeric buttons (Fig 49) to indicate the quantities. Click one of the numbers to write the number in the "Quantity" field, if editable.

The " **.** " button is a decimal divider. The button is active only if decimal specification is relevant.
The "**+/-**" button makes it possible to specify whether a value is negative or positive. The button is active only if negative values specification is relevant.

The " **C** " button brings back to zero the specified quantities.

The **Next** button selects the item following the one currently selected.

Use the arrow buttons and to scroll up and down the screen contents in case the items are too many to be displayed all together.

The **Near to Expire** button makes it possible the list of items displayed. See the previous paragraph "How to select the type of resources displayed on screen" for instructions.

Use the **Print** button to print the list of resources currently displayed.
When editing the screen contents the **Update** and **Cancel** buttons appear on the command bar.

The **Update** button saves the changes made. After every editing of the screen contents it is necessary to click the **Update** button to save the changes.

The **Cancel** button annuls all the changes made.

4.2. Editing the screen contents

The “Expired resources” module makes it possible to manage some of the values of the resources displayed. I.e. it is possible to change the expiration dates if necessary. It is moreover possible to delete a resource from the list.

For each resource the values that can be changed are highlighted light blue.

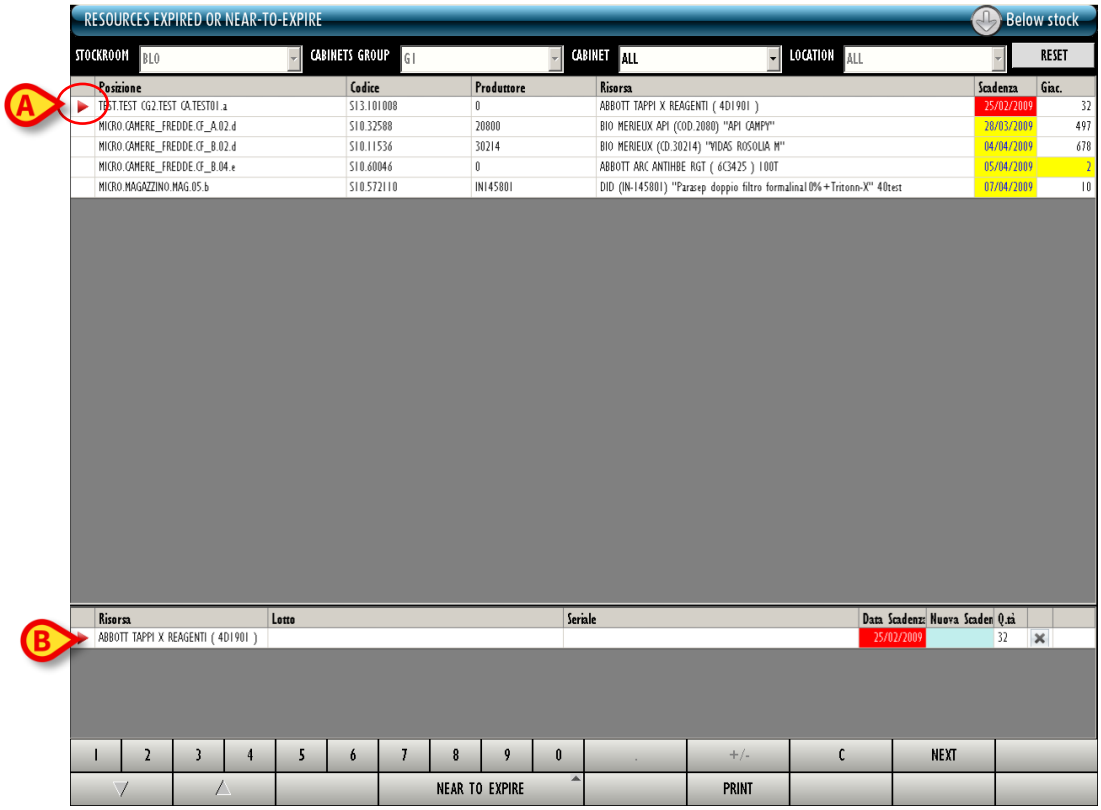
4.2.1. How to change the expiration date

The expiration date can only be changed to the “optimistic management” resources. See paragraph 1.5 for a description of this kind of resources management.

To specify a new expiration date for a resource it is necessary, in the upper area,

- click the row corresponding to the kind of resource for which the expiration date must be changed.

The kind of resources is selected; the icon appears on the left (Fig **A**).



Fig

The details of the clicked resource are displayed in the lower area (Fig **B**).

In the lower part of the screen, on the row corresponding to the resource whos values must be changed,

- click the cell indicating the resources' "new expiration date" (Fig 51).

The corresponding row is selected; the icon appears at the beginning of the row. The button appears in the cell. The current date is automatically displayed.

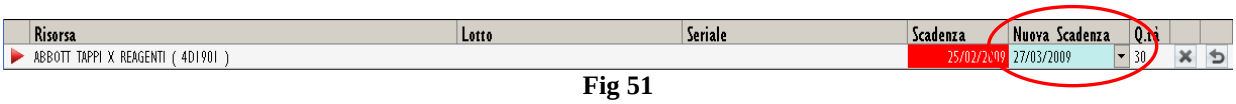


Fig 51

- Click the button.

A calendar-window appears (Fig 52).

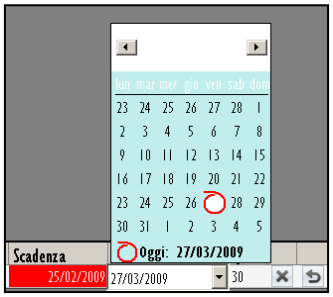


Fig 52

- Select the date on the calendar (day and month).

The new date appears in the "New expiration date" cell (Fig 53)

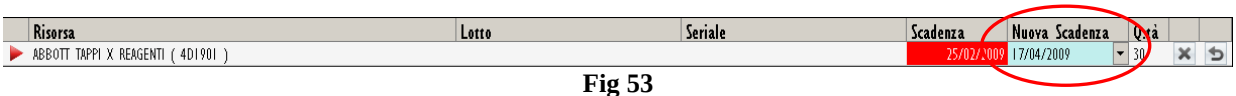


Fig 53

- Click the UPDATE button on the command bar.

The expiration date is updated according to the new values (Fig 54).

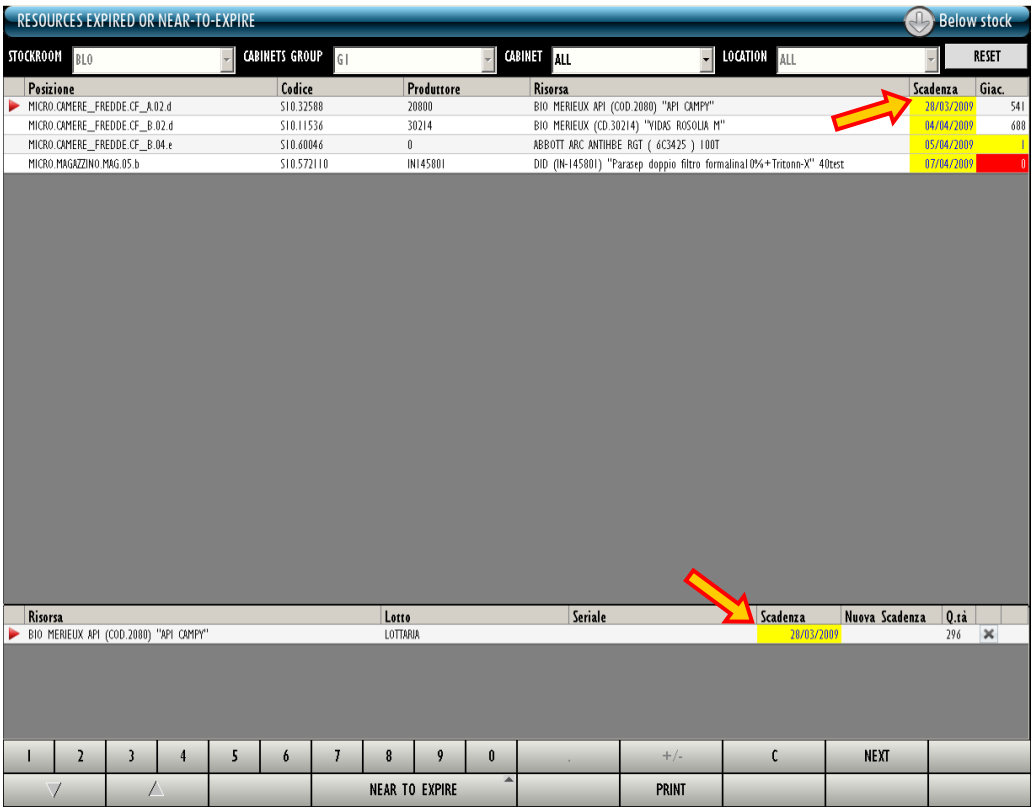


Fig 54

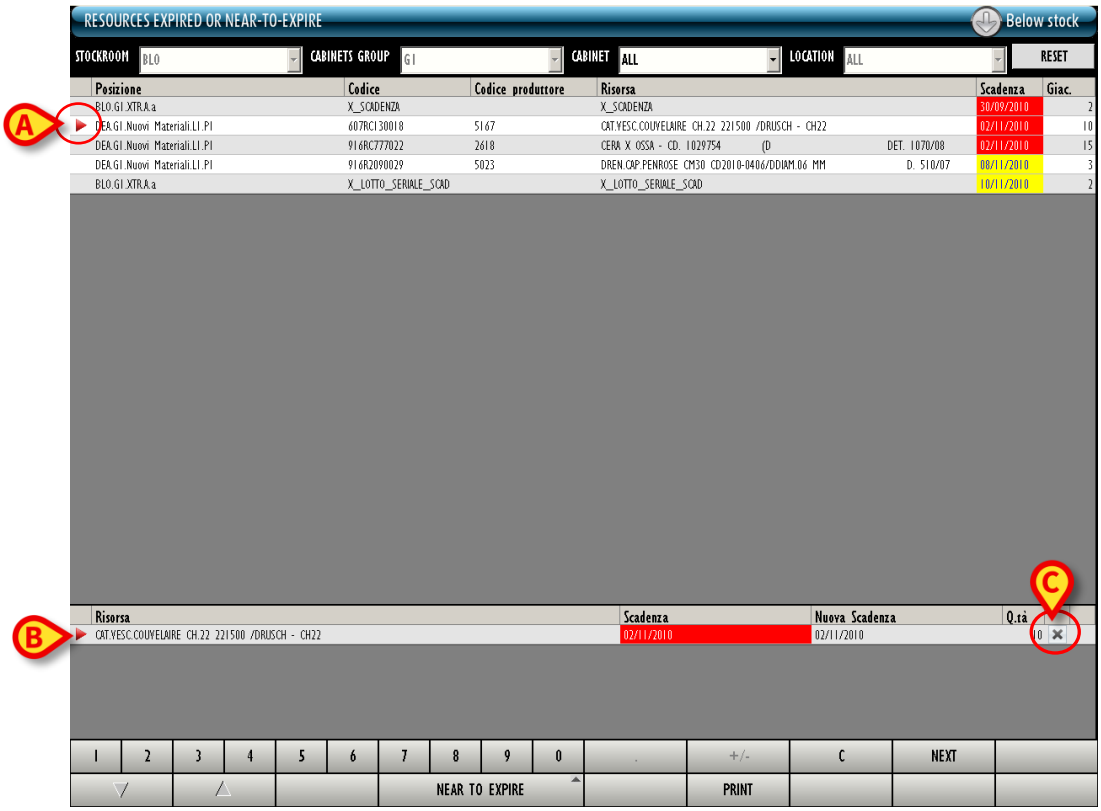
The icon makes it possible to annul the changes made (“Undo” button).

4.2.2. How to delete an item from the list

To delete an item, in the upper area,

- click the row corresponding to the kind of resource that must be deleted.

The kind of resource is selected; the icon appears at the beginning of the row (Fig **A**).



Fig

The details of the clicked resource are displayed in the lower area (Fig **B**).

In the lower area, on the row corresponding to the resource that must be deleted,

- click the button at the end of the row (Fig **C**).

The row appears in strike-through characters (Fig 55).

Fig 55

- Click the **Update** button on the command bar.

The row disappears.

The icon makes it possible to annul the changes made ("Undo" button).

5. Administrative discharge

The administrative discharge screen makes it possible to manage those pickings that are not covered by the other picking procedures described in this manual (cost center picking, picking for operation, materials transfer etc…).
The various reasons for picking materials are defined by configuration and depend on the actual procedures in use.

To access the administrative discharge screen

- click the

on the lateral bar.

The following screen opens (Fig 56).

Fig 56 - Administrative discharge screen

This screen makes it possible to manage the material's administrative discharge.

5.1. "Administrative discharge" - screen structure

The administrative discharge management screen is structured according to the general description offered in paragraph 1.4, see this paragraph for the screen general features. The present paragraph describes the screen specific features.

5.1.1. Filters

Fig 57 - Filters on the "Administrative discharge" screen

The available filters on the "Administrative discharge" screen (Fig 57) are:

- "Stockroom" - It makes it possible to specify the stockroom in which the items on screen are located.
- "Cabinets group" - It makes it possible to specify the cabinets group in which the items on screen are located.
- "Cabinet" - It makes it possible to specify the cabinet in which the items on screen are located.

The checkbox enlarged in Fig 58, if checked, makes it possible to display only those materials expiring before a specified date. A configuration parameter either enables or disabile the data specification possibility. If selection is disabled this filter is not active.

Fig 58

See paragraph 1.4.2 for general instructions on how the filters work.

5.1.2. Data area

The data area of the “Administrative discharge” screen displays the list of the materials having the features specified in the filters (Fig 59 **A**).

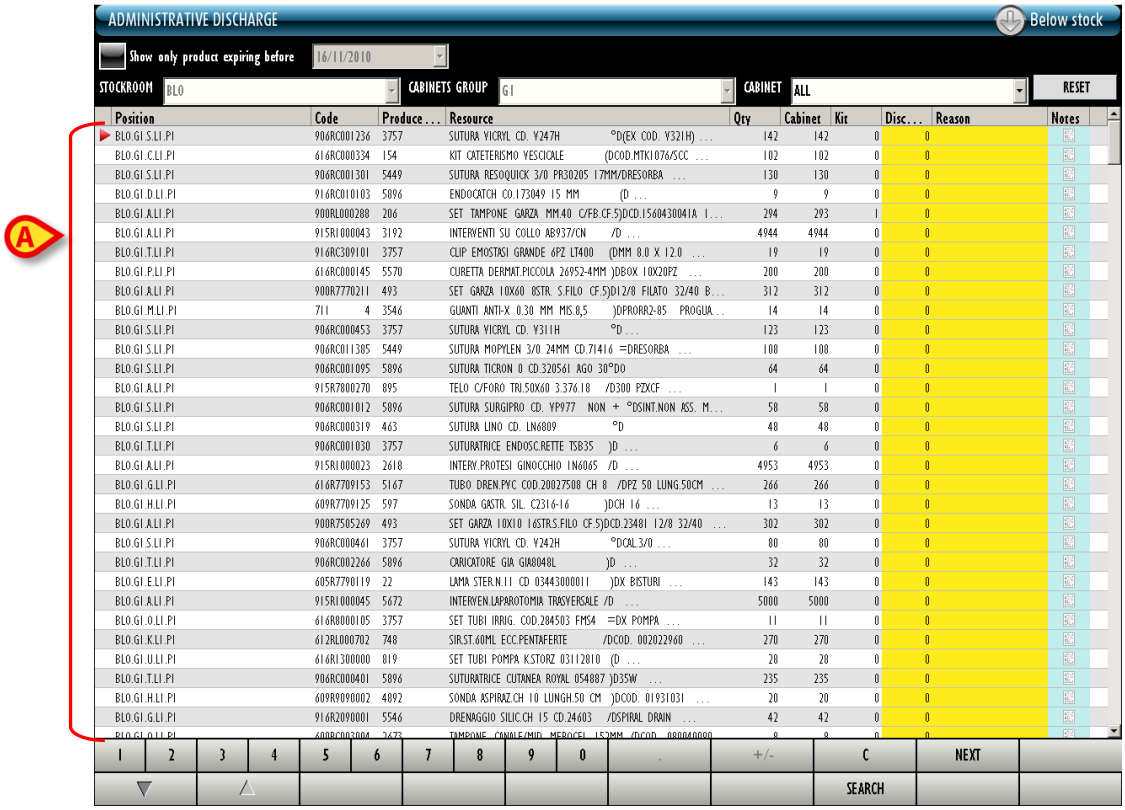


Fig 59 - Administrative discharge

Each row corresponds to a resource. For each resource the following information can be displayed:

- position;
- resource code;
- producer code;
- resource name;
- lot (if enabled by configuration);
- expiration date (if enabled by configuration);
- serial number (if enabled by configuration);
- the total quantity in stock;
- the quantity of resource located in the cabinets;
- the quantity of resource located in the generic kits already prepared.
- the resource quantity to be discharged;
- the discharge reason;
- possible notes.

The quantity to be discharged, the discharge reason and the notes must be specified by the user.

The icon on the left indicates the selected resource.

When the quantity in stock for a resource is less than the minimum quantity (indicated by configuration) the corresponding cell is highlighted pink; when the quantity in stock for a resource is less than the ideal quantity (indicated by configuration) the corresponding cell is highlighted yellow.

The rows highlighted green indicate resources that are not anymore in use for the current healthcare needs and procedures, but still there is a ceratin amount of resource in stock.

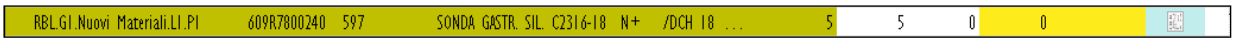


Fig 60

5.1.3. The "Administrative discharge" screen command bar

The command bar of the "Administrative discharge" screen (Fig 61) is formed of several buttons. This paragraph lists briefly the functions of the different buttons, referring to successive paragraphs when more detailed instructions on a specific functionality are necessary.

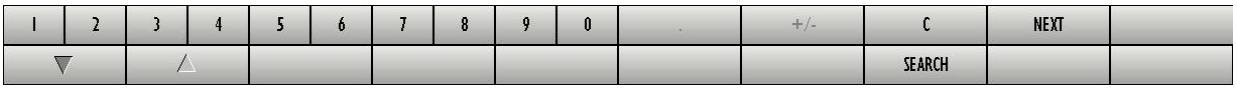


Fig 61 - Command bar

The upper line contains the buttons making it possible to manage the numeric data specification.

Fig 62 - Numeric buttons

Use the numeric buttons (Fig 62) to indicate the quantities. Click one of the numbers to write the number in the "Quantity" field, if editable.

The " **.** " button is a decimal divider. The button is active only if decimal specification is relevant.
The "**+/-**" button makes it possible to specify whether a value is negative or positive. The button is active only if negative values specification is relevant.

The " **C** " button brings back to zero the specified quantities.

The **Next** button selects the item following the one currently selected.

Use the arrow buttons ▼ and ▲ to scroll up and down the screen contents in case the items are too many to be displayed all together.

Use the **Search** button to display the list of resources whose features match those specified in the filters. See paragraph 5.2 for instructions.

5.2. How to record the resource discharge

To record the discharge of a resource

- insert the resource data in the selection filters (Fig 63 **A** - if no filter is specified the search result is the full list of all the resources configured in the system).

- Click the **Search** button on the command bar (Fig 63 **B**).

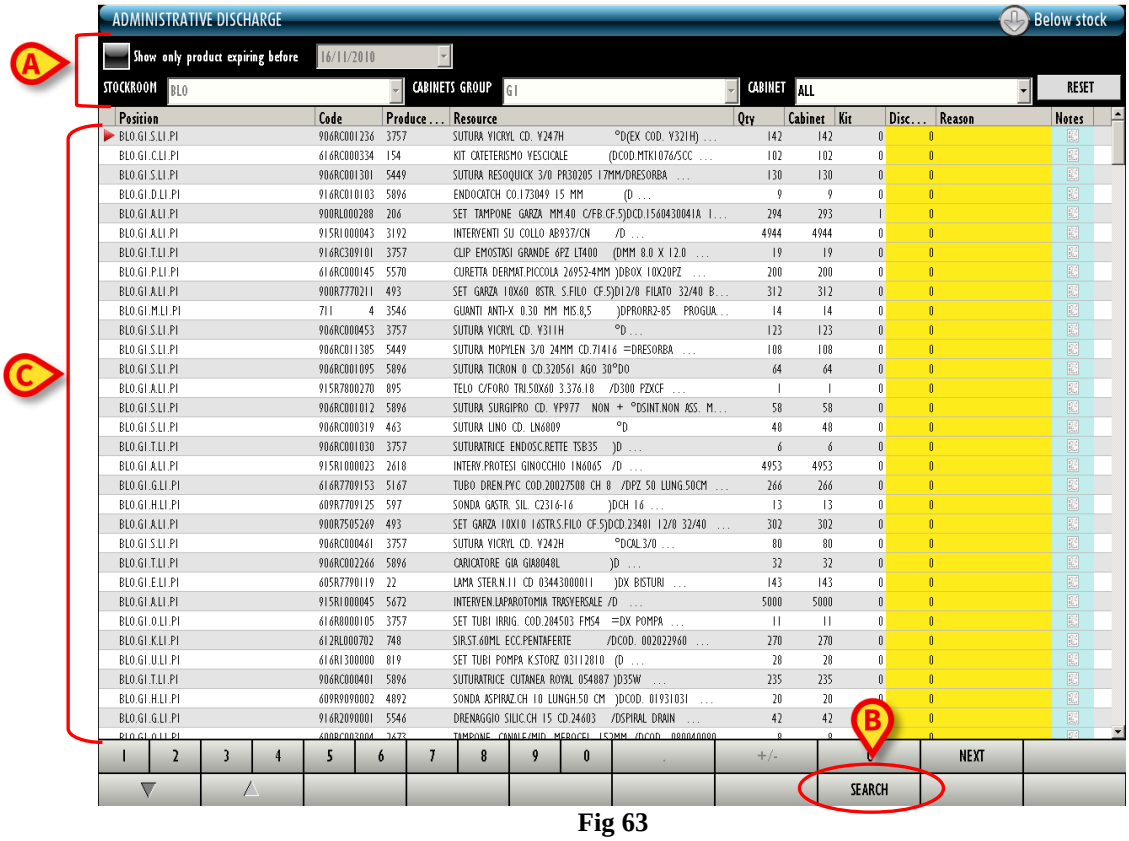


Fig 63

The list of resources matching the specified values appears on screen (Fig 63 **C**).

- Click the row corresponding to the resource that must be discharged.

The resource is this way selected. The ▶ icon appears on the left.

- Specify the resource quantity using the numeric buttons on the command bar.

Otherwise, click the "Discharge" cell on the row corresponding to the resource to be discharged and then use the workstation keyboard to specify the quantity.

The specified quantity appears in the "Discharge" cell (Fig 64 **A**).

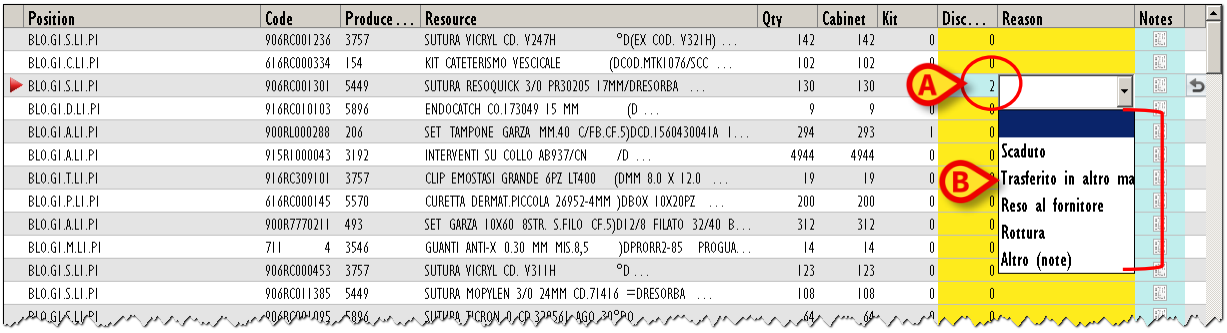


Fig 64

- Click the "Reason" cell to specify the discahrge reason. The reason specification is mandatory.

A drop down menu appears, offering various options (Fig 64 **B** - the options are defined by configuration).

- Click the wanted option.

The selected reason appears in the "Reason" cell.

The icon makes on the right it possible to annul the changes made ("Undo" button).

- Click the **Update** button on the command bar.

5.2.1. How to insert a note

To insert a note, after the resource discharge is recorded,

- click the "Note" cell on the row corresponding to the resource (icon).

The window shown in Fig 65 appears.

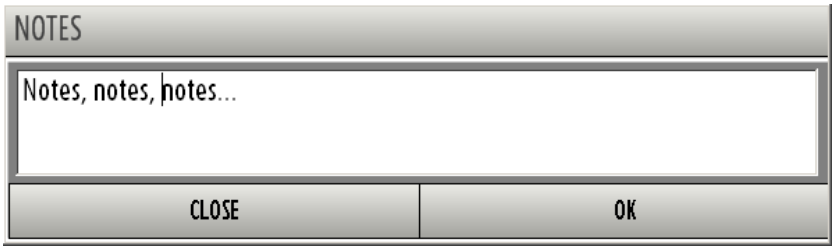
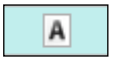


Fig 65

- Insert the note (free text).
- Click the **Ok** button.

The note is this way recorded. The corresponding icon changes in the following way:  (Fig 66).

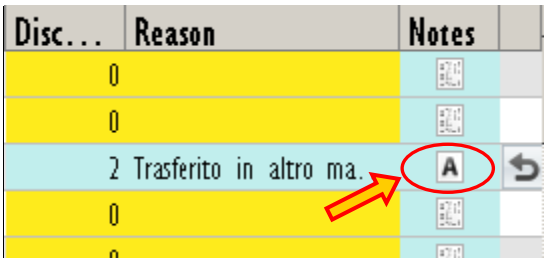
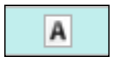


Fig 66

To read the note again

- click the  icon (Fig 66).

The window shown in Fig 65 is displayed again.

6. Movements summary

The “Movements summary” module makes it possible to display all the resources movements in a specific period. riepilogo

To access this module

- click the

icon on the lateral bar.

The following screen opens (Fig 67).

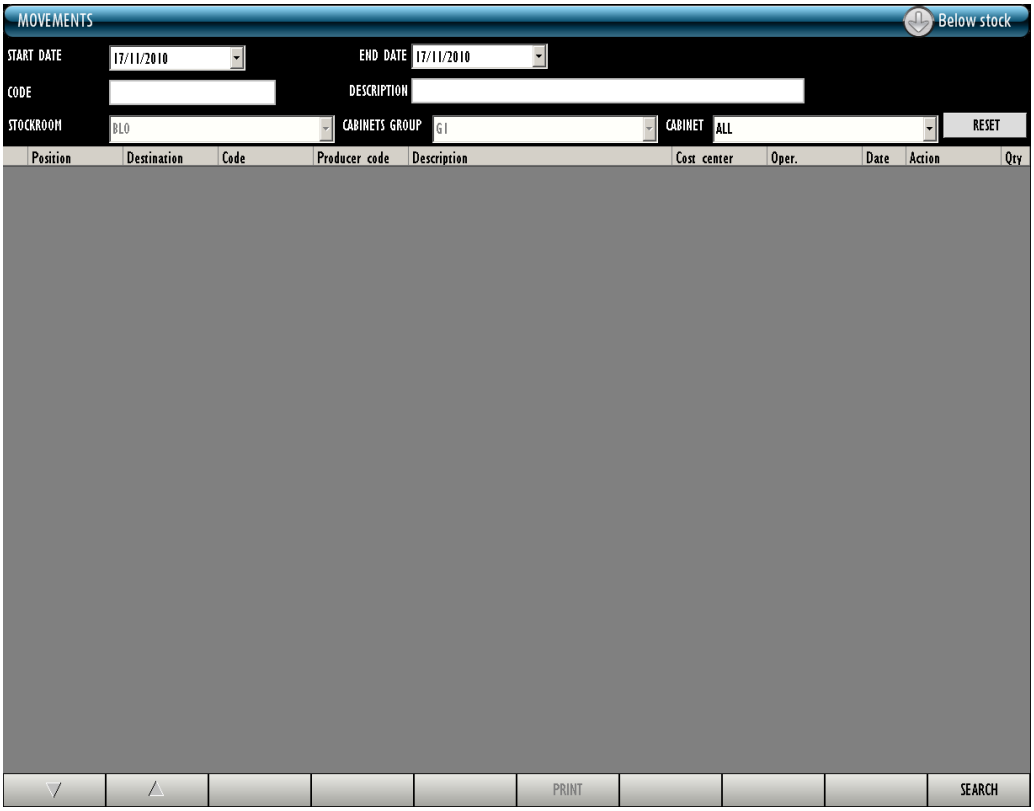


Fig 67

6.1. “Movements summary” - screen structure

The “Movements summary” screen is structured according to the general description offered in paragraph 1.4, see this paragraph for the screen general features. The present paragraph describes the screen specific features.

6.1.1. Filters

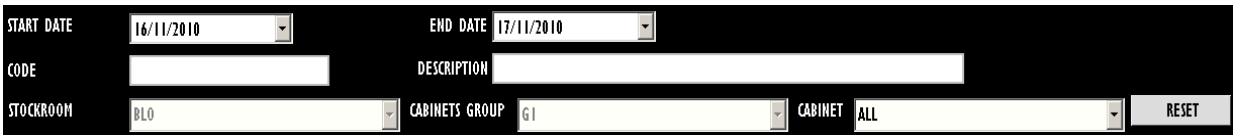


Fig 68 - Filters in the “Movements” screen

The available filters on the “Movements summary” screen (Fig 67) are:

- “Start date” and “End date” - these filters make it possible to display the list of movements recorde in the time span defined by the two dates.
- “Code” - it makes it possible to display the code of the resource whose movements will be displayed.
- “Description” - it makes it possible to display the name of the resource whose movements will be displayed.
- “Stockroom” - it displays only the movements of the resources located in a specific stockroom.
- “Cabinets group” - it displays only the movements of the resources located in a specific cabinets group.
- “Cabinet” - it displays only the movements of the resources located in a specific cabinet.

See paragraph 1.4.2 for general instructions on the filters in the “Stock Management” system.

6.1.2. Data area

The data area of the “Movements” screen displays the list of all the movements whose features match with those specified in the filters and that were recorded during the time period comprised between the specified “Start” and “End” date (Fig 69 **A**).

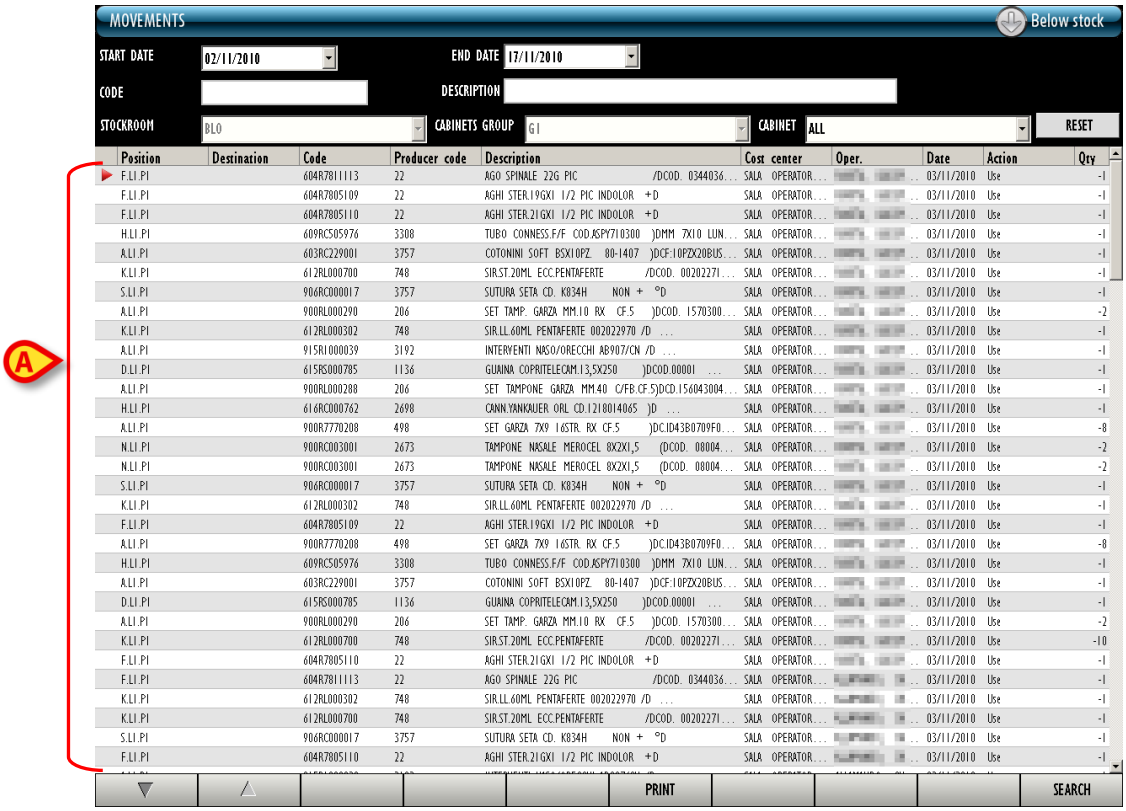


Fig 69 - Movements

Each row corresponds to the movement of a resource. Each single action is displayed separately, even thoug the resource is the same. For each movement the following information is displayed:

- the position;
- the destination (indicated in case of resource transfer from a position to another);
- the resource code;
- the producer code;
- the name of the resource;
- the lot (if enabled by configuration);
- the expiration date (if enabled by configuration);
- the serial number (if enabled by configuration);
- the relevant cost center (it is indicated if the movemente is attributed to a cost center, for instance a cost center picking);
- the relevant operation (it is indicated if the movemente is attributed to a cost center, for instance a picking for operation);
- the date in which the movement was recorded;
- the specific action performed (for example: use of the resource, change of quantity, resource transfer etc…);
- the quantity of resource moved.

This is a read-only screen. None of the values can be edited.

6.1.3. The command bar of the “Movements” screen

The command bar of the “Movements summary” screen (Fig 70) is formed of several buttons. This paragraph lists briefly the functions of the different buttons, referring to successive paragraphs when more detailed instructions on a specific functionality are necessary.

Fig 70 - Command bar

Use the arrow buttons and to scroll up and down the screen contents in case the items are too many to be displayed all together.

Use the **Print** button to print the list of movements currently displayed.

Use the **Search** button to display the list of movements after the values in the selection filters are set.

6.2. How to display the list of movements

To display the list of movements,

- insert the values in the search fields (Fig 71 **A**).

Fig 71 - Movements summary

- Click the **Search** button on the command bar (Fig 71 **B**).

The list of movements corresponding to the values specified in the search fields is displayed (Fig 71 **C**).

7. Cost center for resource picking

It is possible to record the picking of a resource and attribute it to a cost center.

To do that it is necessary, first of all, to select the cost center.

To select the cost center

- click the

icon on the lateral bar.

The “Cost center selection” module opens (Fig 72).

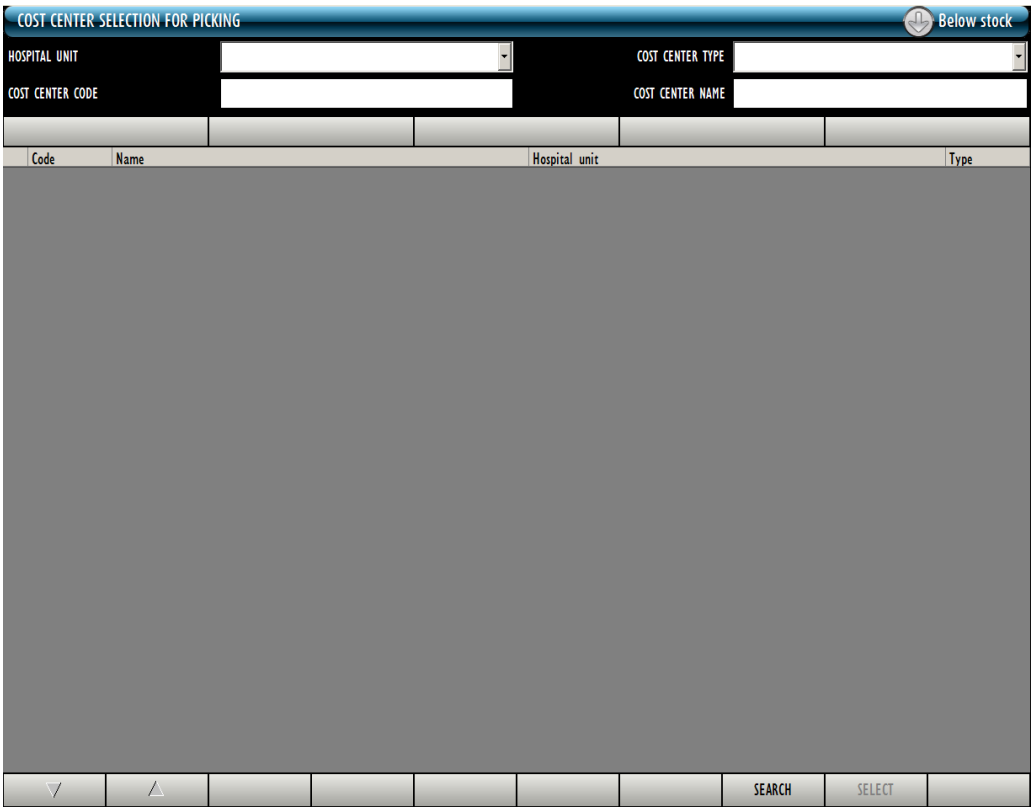


Fig 72 - Cost center attibution for resource picking

Paragraph 7.1 describes the screen shown in Fig 72.
Paragraph 7.2 describes the cost center attibution procedure.

7.1. Cost center: screen structure

The “Cost center” screen is structured according to the general description offered in paragraph 1.4, see this paragraph for the screen general features.
An additional button bar is here available, displaying the recent selections and making it possible to quick select the cost center previously selected (Fig 79).The present paragraph describes the screen specific features.

7.1.1. Filters

Fig 73 - Filters on the “Cost center” screen

The available filters on the “Cost center” screen (Fig 73) are:

- “Hospital Unit” - Specifies the hospital unit that is referent for the cost center that will be selected.
- “Cost center type” - Specifies the cost center type.
- “Cost center code” - Specifies the cost center code.
- “Cost center name” - Specifies the cost center name.

See paragraph 1.4.2 for instructions on how the filters work in the “Stock Management” system. In this specific case the filters “Hospital Unit” and “Type” are selected on a menu containing a list of pre-defined options, while the filters “Code” and “Name” are specified typing the name/code on the workstation keyboard.

7.1.2. Data area

The data area contains the list of all the cost centers having the features specified in the filters (In Fig 74 **A** the "Ortopedia and Traumatologia" Hospital Unit is specified).

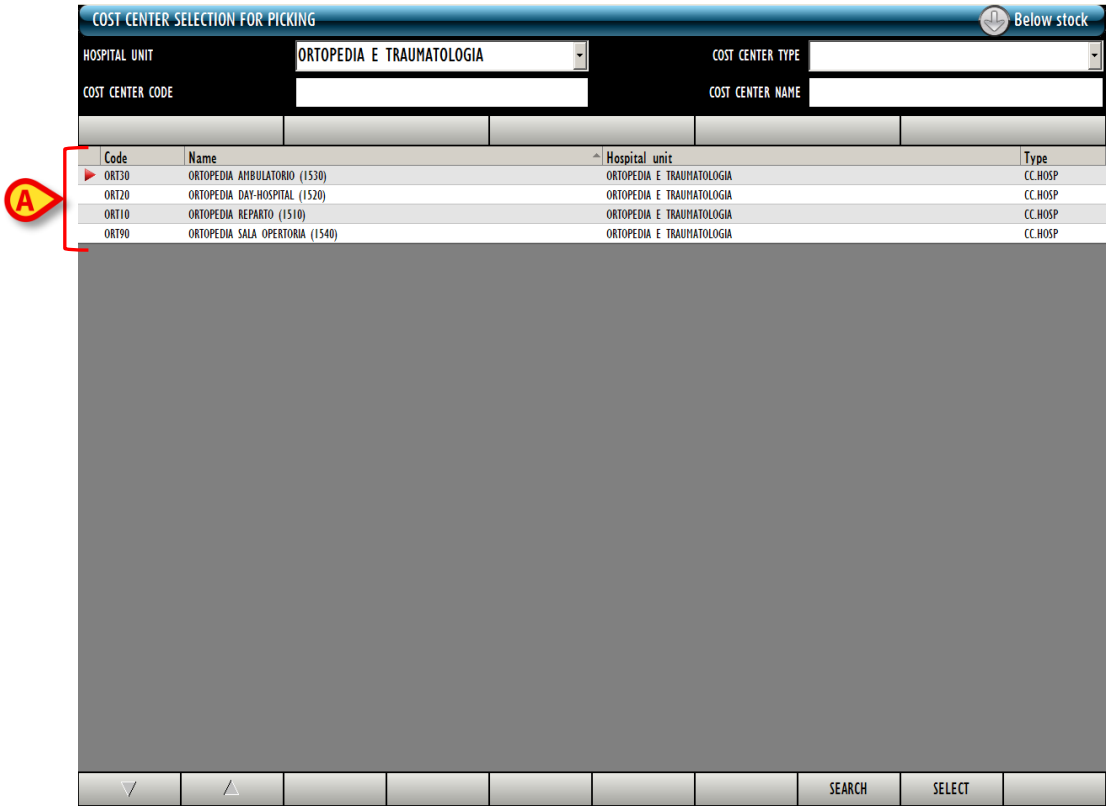


Fig 74 - Cost centers for resource picking

Each row corresponds to a cost center. For each cost center the following information can be displayed:

- cost center code;
- cost center name;
- the referent hospital unit;
- the cost center type.

None of the above information is editable.

> *For each cost center either all or part of the possible information can be present, depending on the way the cost center is configured.*

The ▶ icon, possibly appearing at the beginning of a row, indicates the selected cost center.

7.1.3. The command bar of the "Cost center selection for picking" screen

This paragraph describes the buttons on the command bar (Fig 75) of the screen.

Fig 75 - Command bar

Use the arrow buttons and to scroll up and down the screen contents in case the items are too many to be displayed all together.

Use the **Search** button to search and display the list of items having the features specified in the filters described in paragraph 7.1.1.

Use the **Select** button to select the cost center to which the picking must be attributed. The detailed procedure is described in paragraph 7.2.

7.2. Cost center for picking selection procedure

This paragraph describes the procedure that must be performed to select the cost center to which the resource/s picking will be attributed.

- Click the icon on the lateral bar to access the cost center selection screen (Fig 76).

Fig 76 - Cost centers attribution for resource picking

- Specify, in the filters, the available data of the wanted cost center. In Fig 76 **A** the Hospital Unit "Ortopedia e Traumatologia" is specified.

- Click the **Search** button on the command bar (Fig 76 **B**).

The list of cost centers having the features specified will be displayed on screen (Fig 77 **A**).

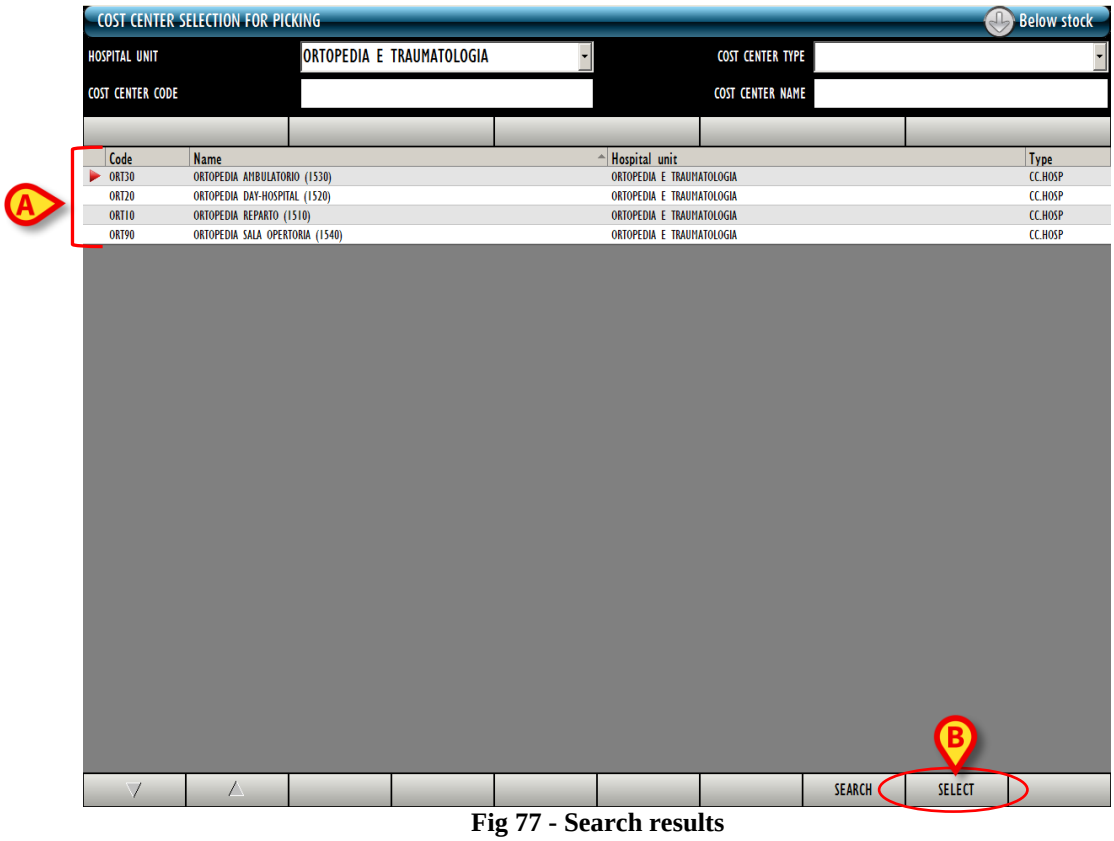


Fig 77 - Search results

- Click the row corresponding to the wanted cost center.

The ▶ arrow appears at the beginning of the clicked row.

- Click the **Select** button on the command bar (Fig 77 **B**).

The screen making it possible to record the picking of materials will open ("Picking"), described in paragraph 8. On this screen, the name of the cost center selected appears under the screen header (Fig 78).

See paragraph 8 for the screen description on the materials picking procedure.

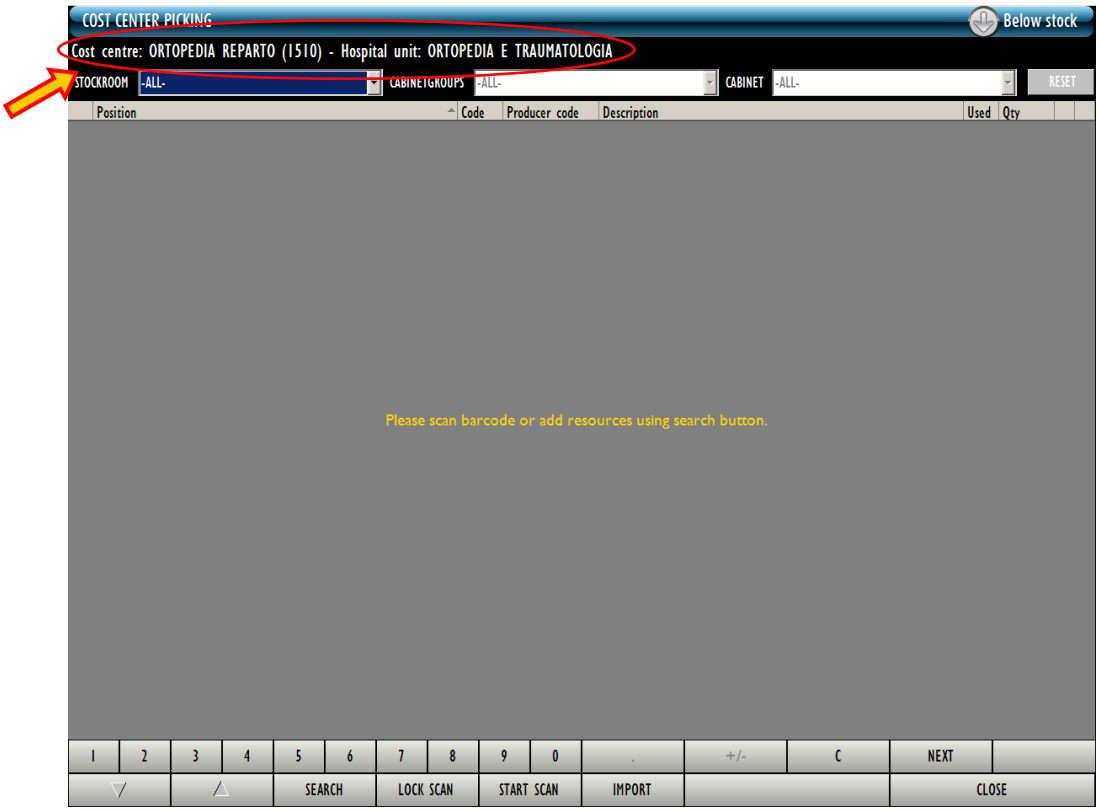


Fig 78 - "Picking" screen with cost center specification

7.2.1. "Recent" cost centers

The bar indicated in Fig 79 is formed of five buttons displaying the five most recent cost center selections.

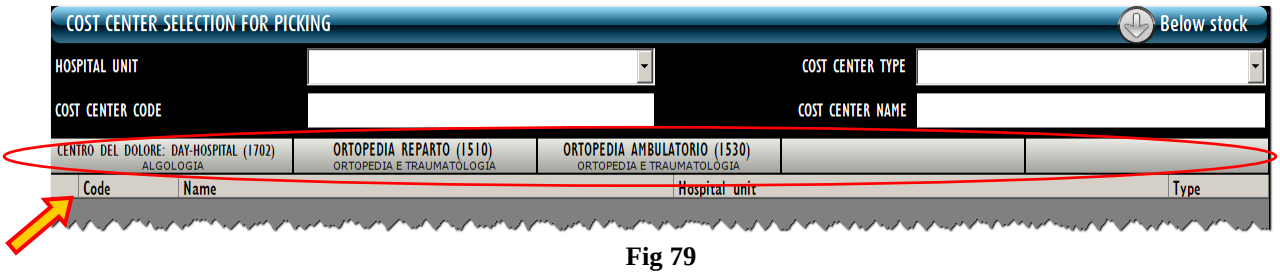


Fig 79

To select one of those cost centers again

- click the corresponding button.

The "Picking" module screen, described in paragraph 8, will open, displaying under the header the name of the chosen cost center (Fig 78).

8. Resource picking

The “Picking” module can be used every time the picking of a resource must be recorded. The picking can be attributed to a cost center, to an operation or to any other relevant entity, depending on the procedures in use and the configuration chosen.

The configuration here described attributes the resource picking to a cost center.
In this configuration the resource picking is enabled only after cost center selection. Therefore the procedure described in paragraph 8.3 and subsequent (resource selection) follows the procedure described in paragraph 7.2 (cost center for picking selection).

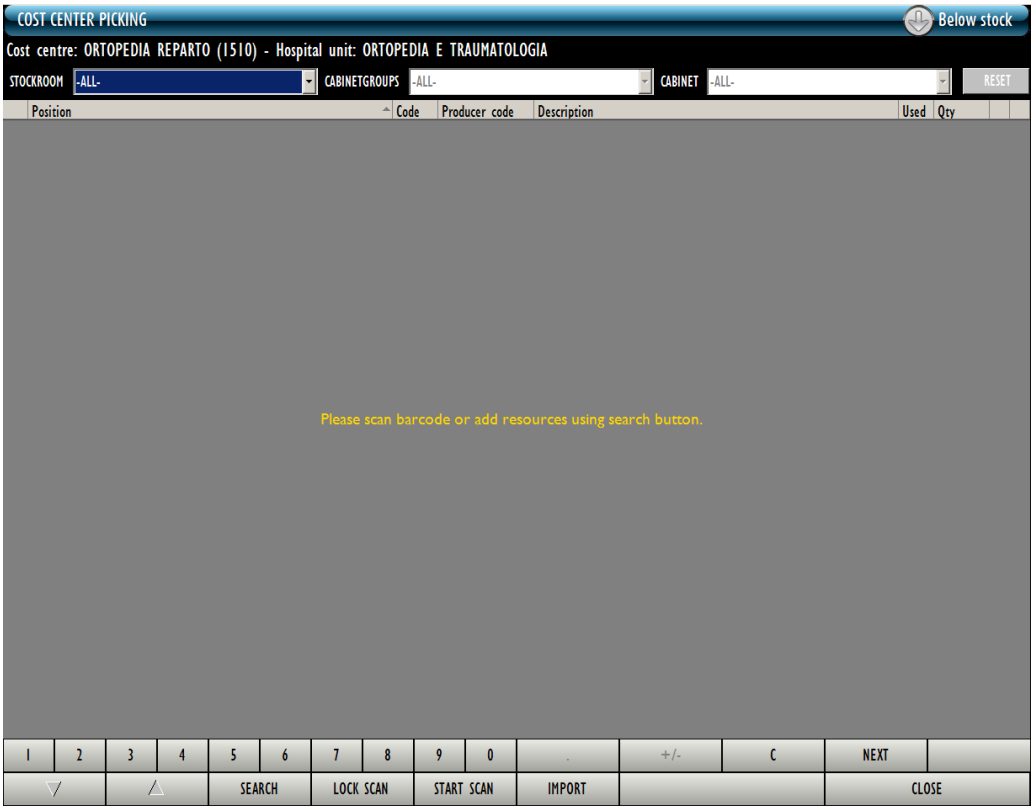


Fig 80 - Picking screen with cost center specification

The screen shown in Fig 80 is described in paragraph 8.1.
The related procedures are described in paragraph 8.2 (data editing), 8.3 (picking recording) and 8.4 (barcode picking recording).

8.1. “Picking” screen description

8.1.1. Filters

Fig 81 - Filters on the “Resources picking” screen

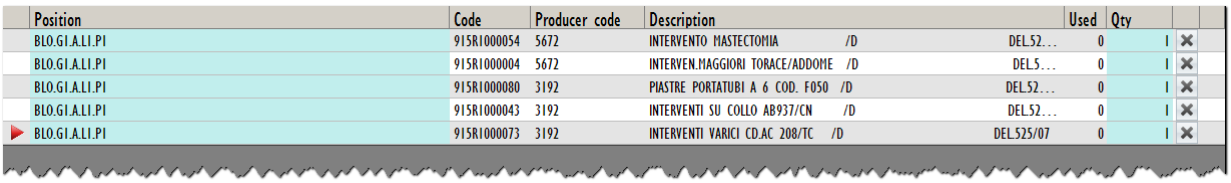
The filters available on the “Resources picking” screen (Fig 81) are:

- “Stockroom” - Displays only the resources of a specific stockroom.
- “Cabinet group” - Displays only the resources of a specific cabinet group.
- “Cabinet” - Displays only the resources of a specific cabinet.

See paragraph 1.4.2 for a general description of the filters in the “Stock Management” system.

8.1.2. Data area

The different resources are listed on screen in the way shown in Fig 82.



Position	Code	Producer code	Description	Used	Qty
BL0.GI.A.LI.PI	915R1000054	5672	INTERVENTO MASTECTOMIA /D DEL.52...	0	1
BL0.GI.A.LI.PI	915R1000004	5672	INTERVEN.MAGGIORI TORACE/ADDOME /D DEL.5...	0	1
BL0.GI.A.LI.PI	915R1000080	3192	PIASTRE PORTATUBI A 6 COD. F050 /D DEL.52...	0	1
BL0.GI.A.LI.PI	915R1000043	3192	INTERVENTI SU COLLO AB937/CN /D DEL.52...	0	1
BL0.GI.A.LI.PI	915R1000073	3192	INTERVENTI VARICI CD.AC 208/TC /D DEL.525/07	0	1

Fig 82

For each resource the following data can be displayed:

- resource position;
- resource code (not editable);
- manufacturer code (not editable);
- description (not editable);
- the lot (if enabled by configuration);
- the expiration date (if enabled by configuration);
- the serial number (if enabled by configuration);
- used resource quantity;
- quantity of resources to be picked.

Not all the information is always specified. The kind of information available (or mandatory) depends on the configuration chosen and the procedures in use.

The information highlighted yellow is mandatory. In case of missing mandatory information the system stops the picking procedure and warns the user with a specific pop-up message (Fig 83).

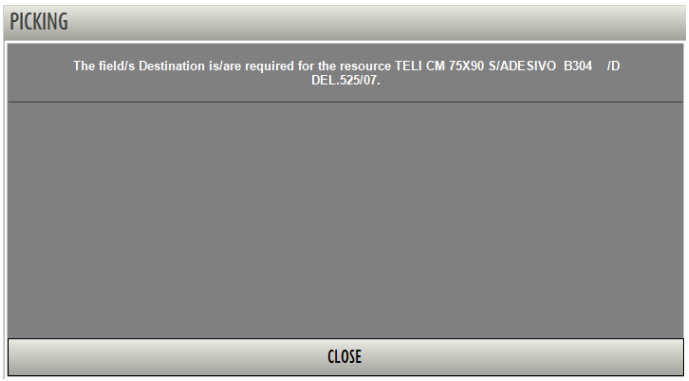


Fig 83

- Click **Close** to hide the pop-up window.

The kind and number of mandatory information for a resource depends on the resource configuration. When one of the mandatory information is specified the cell colour turns from yellow to light-blue

The arrow appearing at the beginning of a row indicates the selected resource.

The icon at the end of the row makes it possible to cancel the resource.

When the icon is clicked the row changes in the way shown in Fig 84.

Fig 84 - Cancelled resource

When the screen is updated the rows cancelled this way are not considered as picked resources. This functionality makes it possible to rapidly cancel and possibly insert again the items of the picked resources list.

The icon is an “Undo” button. Click the icon to annul the editing performed since and to bring back the row to its original state.

8.1.3. The “resource picking” screen command bar

The command bar of the “resource picking” screen (Fig 85) is formed of several buttons. This paragraph lists briefly the functions of the different buttons, referring to successive paragraphs when more detailed instructions on a specific functionality are necessary.

Fig 85 - Command bar

The upper line contains buttons making it possible to manage the numeric data specification.

Fig 86 - Numeric buttons

Use the numeric buttons (Fig 86) to indicate the quantities. Click one of the numbers to write the number in the “Quantity” field.

The “ **.** ” button is a decimal divider. The button is active only if decimal specification is relevant.
The “**+/-**” button makes it possible to specify whether a value is negative or positive. The button is active only if negative values specification is relevant.

The “ **C** ” button brings back to zero the specified quantities.

The **Next** button selects the item following the one currently selected.

In the lower line:

Use the arrow buttons and to scroll up and down the screen contents in case the items are too many to be displayed all together.

Use the **Search** button to access the system’s search functionalities (described in paragraph 22). Click this button to open the screen shown in Fig 91.

Use the **Lock Scan** button to lock the workstation while reading numerous barcodes that will be recorded all together afterwards. See paragraph 8.4.1 for a description of the related procedures.

Use the **Start Scan** button to begin the reading of numerous barcodes that will be recorded all together afterwards. See paragraph 8.4.2 for the instructions relating to this procedure.

Use the **Import** button to import the selected items using a wireless barcode reader having internal memory. See paragraph 8.4.3 for the instructions relating to this option.

Use the **Close** button to close the current screen.

When editing the screen contents the **Update** and **Cancel** buttons appear on the command bar.

The **Update** button saves the changes made. After every editing of the screen contents it is necessary to click the **Update** button to save the changes.

The **Cancel** button annuls all the changes made.

8.2. Resource data editing

The information regarding a resource can, in certain cases, be edited by the user.

To edit the resource data

- click the field containing the information you wish to change.

The button appears in the field (Fig 87 **A**).

- Click the button.

A menu containing the possible options opens (Fig 87 **B**).

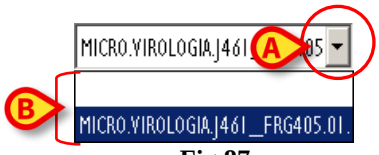


Fig 87

- Click the wanted option.

The option appears in the field.

The available options on the different menus depend on the context. For example: for the “position” field will display all and only the positions in which the resource can be found.

Selecting an option affects the available choices in the other fields. In the “lot” field, for example, only those lots corresponding to the resource and the position selected before will be available for selection.

8.2.1. Specifying the resource quantity

To specify the quantity of resource that must be transferred

- select the row corresponding to the resource.

The selected row is indicated by the arrow (Fig 88 **A**).

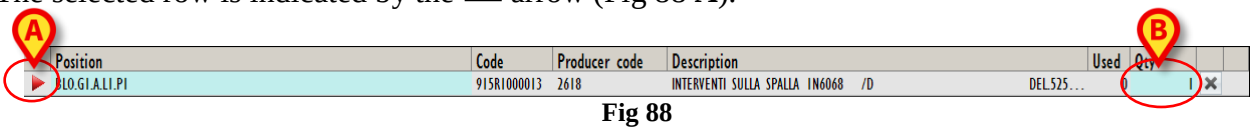


Fig 88

- Specify the new quantity using the numeric buttons on the command bar (Fig 89)

Fig 89 - Numeric buttons

Otherwise you can

- click the cell indicating the "Quantity" (Fig 89 **B**).

The quantity will be highlighted.

- Set the new quantity using either the workstation keyboard or the numeric buttons on the command bar.

8.3. How to record the resource picking

The materials transfer can be recorded both manually, using the buttons on screen, and using a barcode reader.

The different procedures are described in the following paragraphs.

Barcode technology is recommended when selecting an item. Scanning the item's barcode, instead of selecting it manually, helps the user to diminish selection errors.

8.3.1. Manual procedure

To record the resource picking using a manual procedure

- click the **Search** button on the command bar (Fig 90).

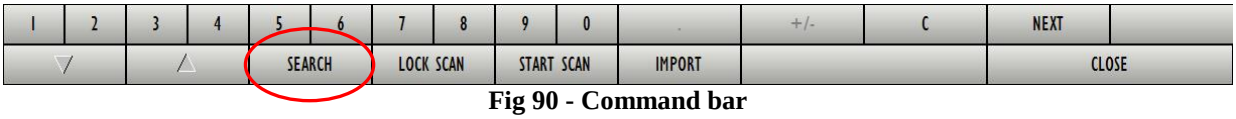


Fig 90 - Command bar

The "Search" screen opens (Fig 91). The screen is described in paragraph 22.

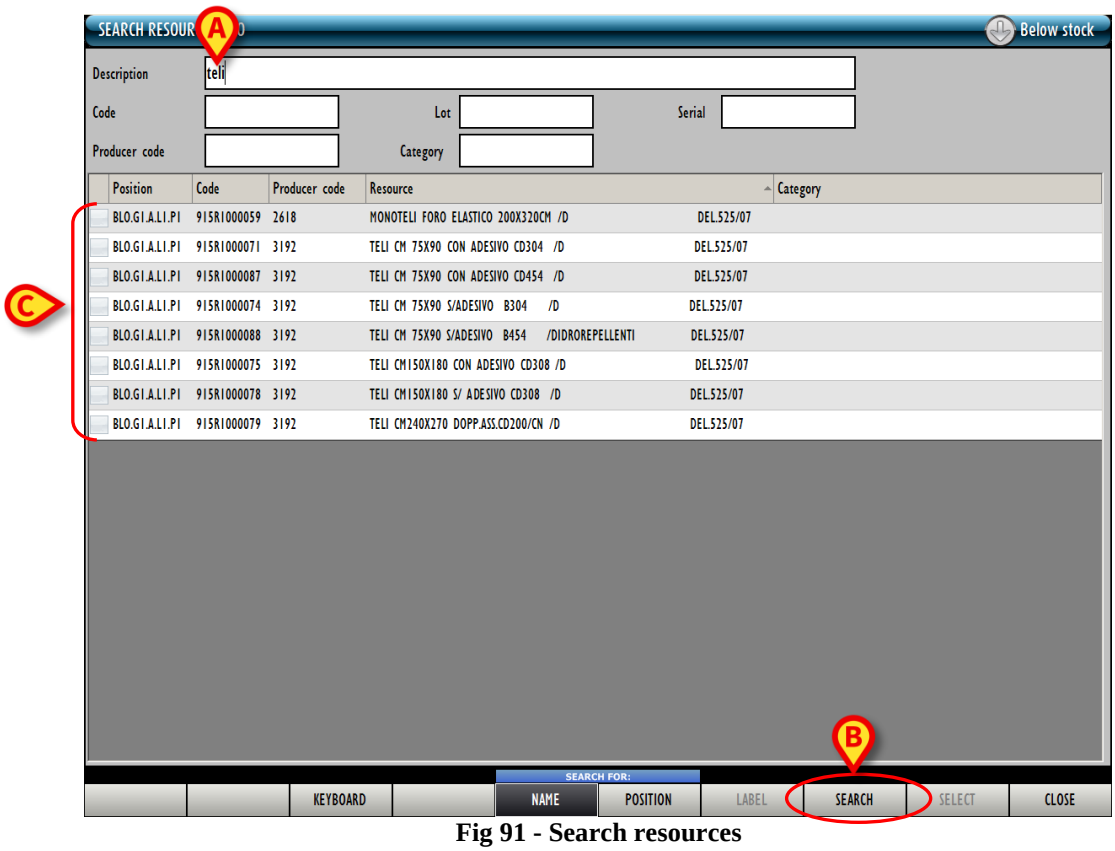


Fig 91 - Search resources

- Insert the available information on the resource in the search fields (Fig 91 **A**).
- Click the **Search** button on the command bar (Fig 91 **B**).

The list of resources corresponding to the information specified is displayed on screen (Fig 91 **C**).

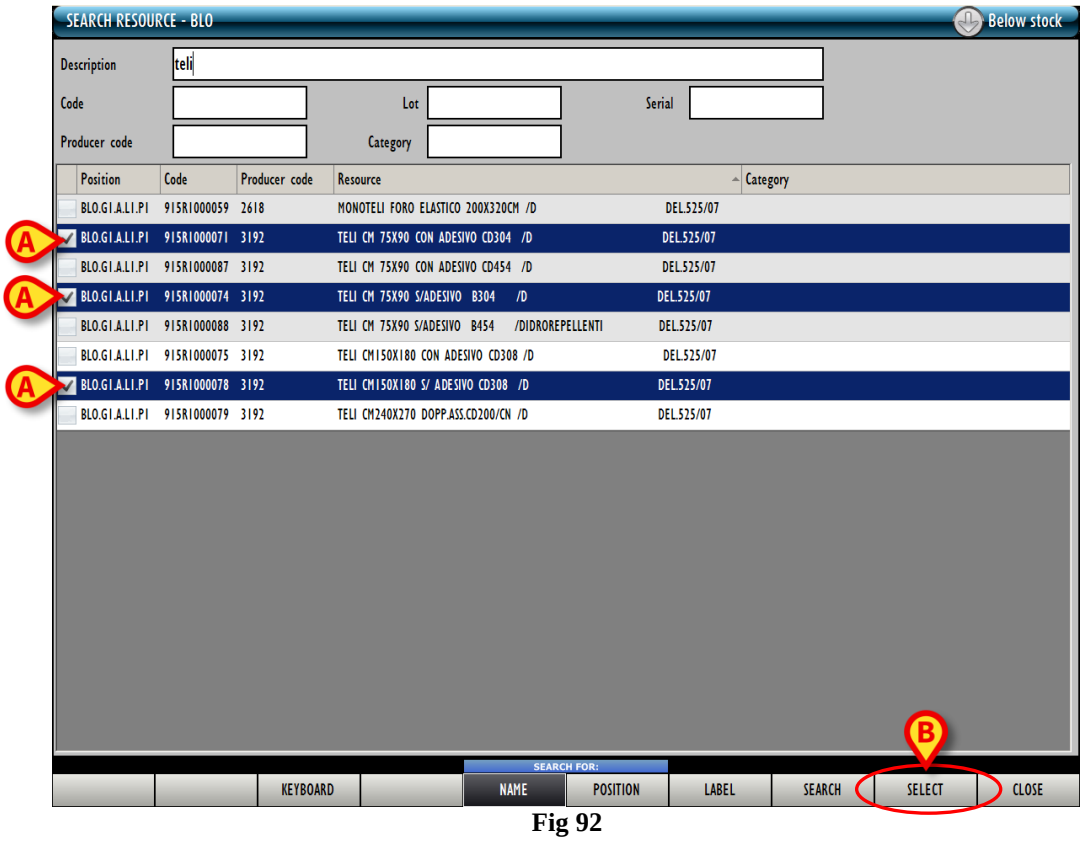


Fig 92

- Click the relevant item/s on the list. Multiple selection is enabled.

The corresponding line/s is/are highlighted (Fig 92 **A**).

- Click the **Select** button on the command bar (Fig 92 **B**).

The resource/s this way selected is displayed in the “materials transfer” screen (Fig 92 **A**).

> *Double click an item to display it directly.*

Fig 93

- Set, if necessary, the values of the inserted resource (lot, quantity, etc… see paragraph 8.2 for the data editing procedures).

- Click the **Update** button on the command bar.

The resource picking is this way recorded. The picking is attributed to the cost center indicated on top of the screen.

8.4. Barcode picking procedure

The resource selection can be performed using a barcode reader. This paragraph describes the procedures related to this functionality.

To record the resource picking using barcode reader, when the “Resource picking” screen is displayed (Fig 93),

- read the barcode of the resource that must be picked.

A row corresponding to the resource appears on screen.

A pink row is created to inform the user when the read barcode belongs to a resource that is not in the cabinets selected as “source” (Fig 94).

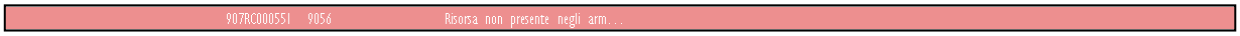


Fig 94

Specific buttons on the command bar make it possible to launch specific barcode reading procedures. These are described in the following paragraphs.

8.4.1. Lock scan

The **Lock Scan** button on the command bar (Fig 95) makes it possible to lock the workstation while the user reads numerous barcodes that will be read later, all together.

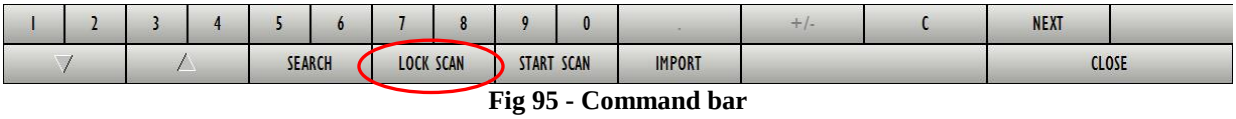


Fig 95 - Command bar

This functionality is used when it is necessary to leave the workstation alone to personally scan the barcodes of several items that are in a different place. This function is performed using a wireless barcode reader.

This is the procedure:

- click the **Lock Scan** button.

The button appears selected:

. The button remains selected while the workstation is locked.

The following window is displayed on screen (Fig 96).

Fig 96

- Read the barcodes. The workstation is locked to other users.

When barcodes reading is complete,

- insert your password in the field indicated in Fig 96 **A**.
- Click the **Continue** button (Fig 96 **B**).

The workstation is this way unlocked. The rows corresponding to all the barcodes read appear on screen.

The **Keyboard** button on the window opens a virtual keyboard that can be used to insert the password (Fig 97).

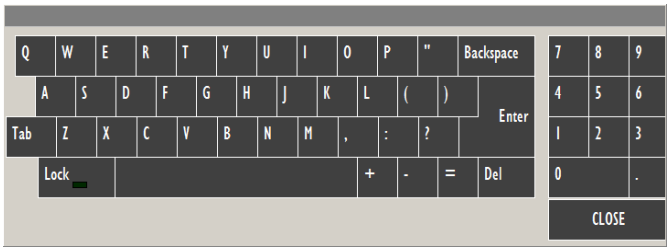


Fig 97 - Virtual keyboard

8.4.1.1. How to force the workstation unlocking

The workstation can be unlocked by another user if his/her permissions level enables him/her to do it.

To force the workstation unlocking

- click the option “Advanced options” on the window that requests password (Fig 98 **A**).

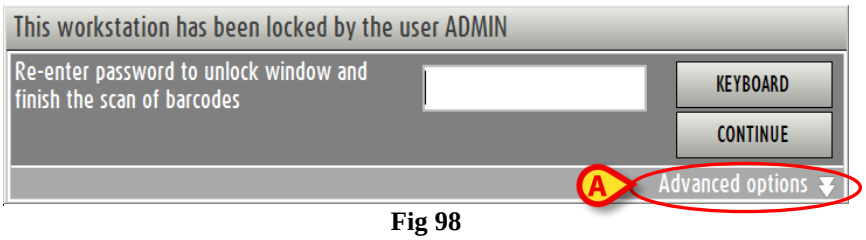


Fig 98

The window changes in the following way (Fig 99).

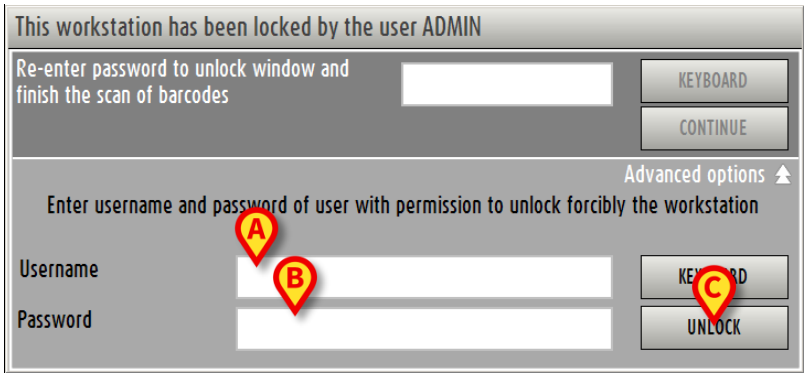


Fig 99 - Advanced options

- Insert the username of the new user in the "Username" field (Fig 99 **A**).
- Insert the password of the new user in the "Password" field (Fig 99 **B**).
- Click the **Unlock** button (Fig 99 **C**).

If the new user has the appropriate permissions the workstation is unlocked.

!

*The barcodes read by the original user will **not** be recorded.*

8.4.2. Start scan

The **Start Scan** button on the command bar (Fig 100) makes it possible to read numerous barcodes that will be recorded later all at the same time.

Fig 100 - Command bar

This is the procedure:

- click the **Start Scan** button.

The button changes to **Stop Scan**.

A pop-up window informs the user that barcode reading can start (Fig 101).

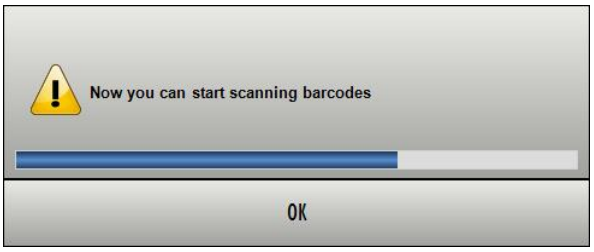


Fig 101

The user is logged out. This happens because the user now probably moves away from the workstation to read the barcodes.

- Read the barcodes.

After barcode reading, to import the data of the scanned resources into the system,

- log in again.
- Click the icon on the lateral bar to select the "Cost Center for picking" module again.
- Click the **Stop Scan** button.

The rows corresponding to the scanned resources barcodes appear on screen.

While scanning the blue bar on top of the screen displays the following advice "Press STOP SCAN to import scanned products" (Fig 102).

Fig 102

8.4.3. Import

The **Import** button on the command bar (Fig 103) makes it possible to import into the system the data read with a wireless barcode reader having internal memory.

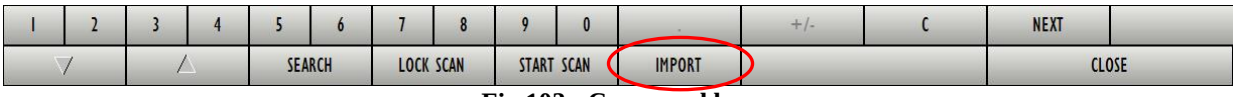


Fig 103 - Command bar

This is the procedure:

- read the barcodes using the appropriate devices, configured to connect to the system.
- Click the **Import** button.

the following windows appear, informing the user on the import procedure state.

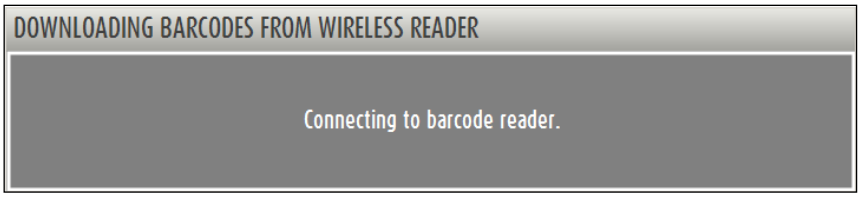


Fig 104

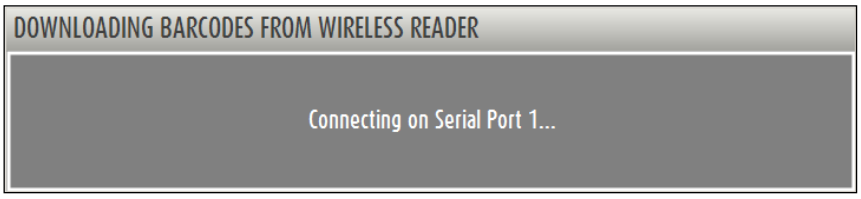


Fig 105

If the procedure succeeds the data are imported. The rows corresponding to the resources scanned appear on screen.

9. Cost center selection for return

The system makes it possible to record the returned resources and to attribute these “Returns “ to the appropriate cost center. To do that, firstly, it is necessary to select the appropriate cost center.

To select the “Cost Center for Returns” module

- click the correponding icon

on the lateral bar.

The following screen opens (Fig 106).

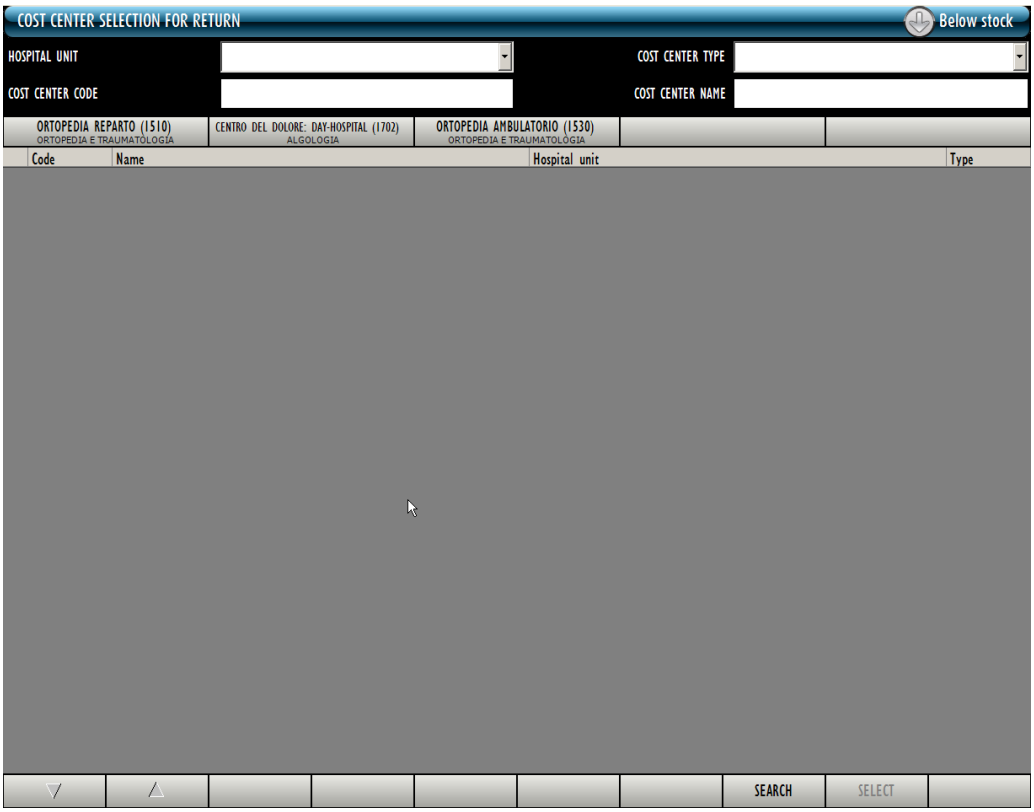


Fig 106 - Cost center for returns

Paragraph 9.1 describes the screen shown in Fig 106.

Paragraph 9.2 describes the cost center selection procedure.

9.1. Cost Center - screen structure

The “Cost center” screen is structured according to the general description offered in paragraph 1.4, see this paragraph for the screen general features.
An additional button bar is here available, displaying the recent selections and making it possible to quick select the cost center previously selected (Fig 113).

This paragraph describes the screen’s specific features.

9.1.1. Filters

Fig 107 - Filters on the “Cost center selection” screen

The available filters on the “Cost center for returns” screen (Fig 107) are:

- “Hospital Unit” - Specifies the hospital unit that is referent for the cost center that will be selected.
- “Type” - Specifies the cost center type.
- “Code” - Specifies the cost center code.
- “Name” - Specifies the cost center name.

See paragraph 1.4.2 for instructions on how the filters work within the “Stock Management” system. In this specific case the filters “Hospital Unit” and “Type” are selected on a menu containing a list of pre-defined options, while the filters “Code” and “Name” are specified typing the name/code on the workstation keyboard.

9.1.2. Data area

The data area contains the list of all the cost centers having the features specified in the filters (In Fig 108 the "Ortopedia e Traumatologia" Hospital Unit is specified).

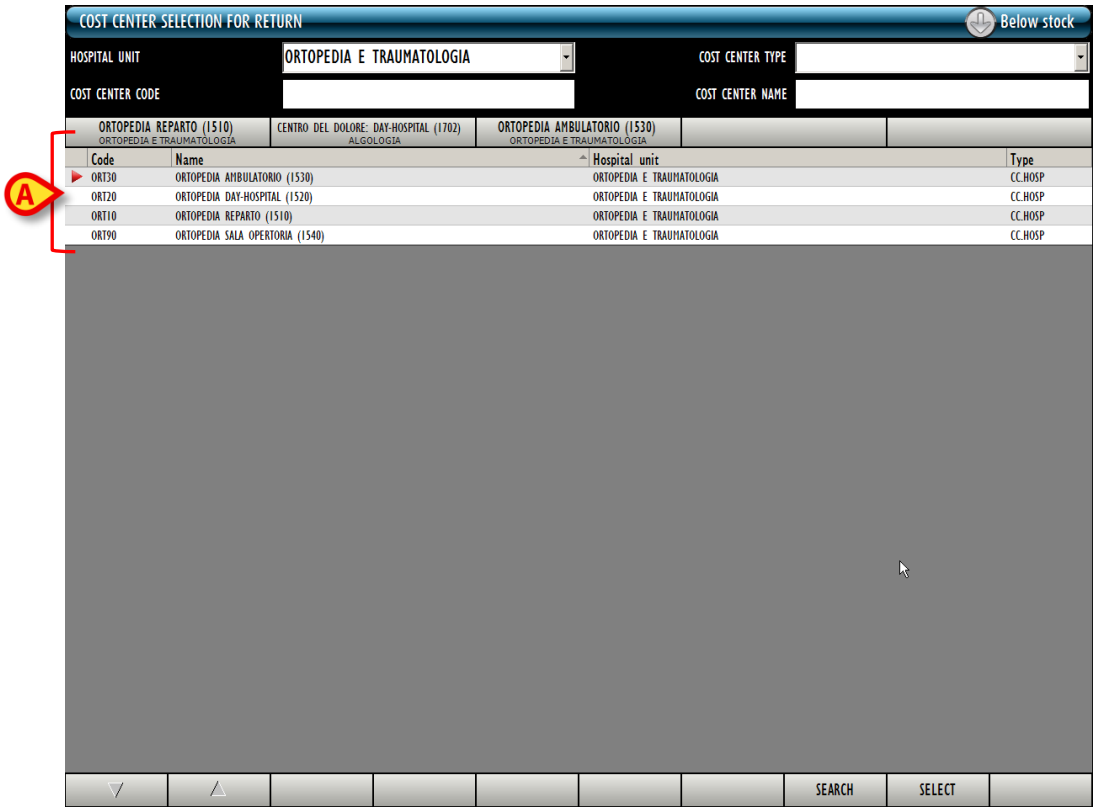


Fig 108 - Cost centers for returns

Each row corresponds to a cost center. For each cost center the following information can be displayed:

- cost center code;
- cost center name;
- the referent hospital unit;
- the cost center type.

None of the above information is editable.

For each cost center either all or part of the possible information can be present, depending on the way the cost center is configured.

The ▶ arrow, possibly appearing at the beginning of a row, indicates the cost center selected.

9.1.3. The command bar of the “Cost center for returns” screen

This paragraph describes the buttons on the command bar (Fig 109) of the screen.

Fig 109 - Command bar

Use the arrow buttons and to scroll up and down the screen contents in case the items are too many to be displayed all together.

Use the **Search** button to search and display the list of items having the features specified in the filters described in paragraph 9.1.1.

Use the **Select** button to select the cost center to which the picking must be attributed. The detailed procedure is described in paragraph 9.4.

9.2. Cost center for returns selection procedure

This paragraph describes the procedure that must be performed to select the cost center to which the resource/s return will be attributed.

- Click the

icon on the lateral bar to access the cost center selection screen (Fig 110).

Fig 110 - Cost center for return attribution

- Specify in the filters the available cost center data. In Fig 110 **A** the "Allergologia" Hospital Unit is specified.

- Click the **Search** button on the command bar (Fig 110 **B**).

The list of cost centers having the features specified is displayed on screen (Fig 111 **A**).

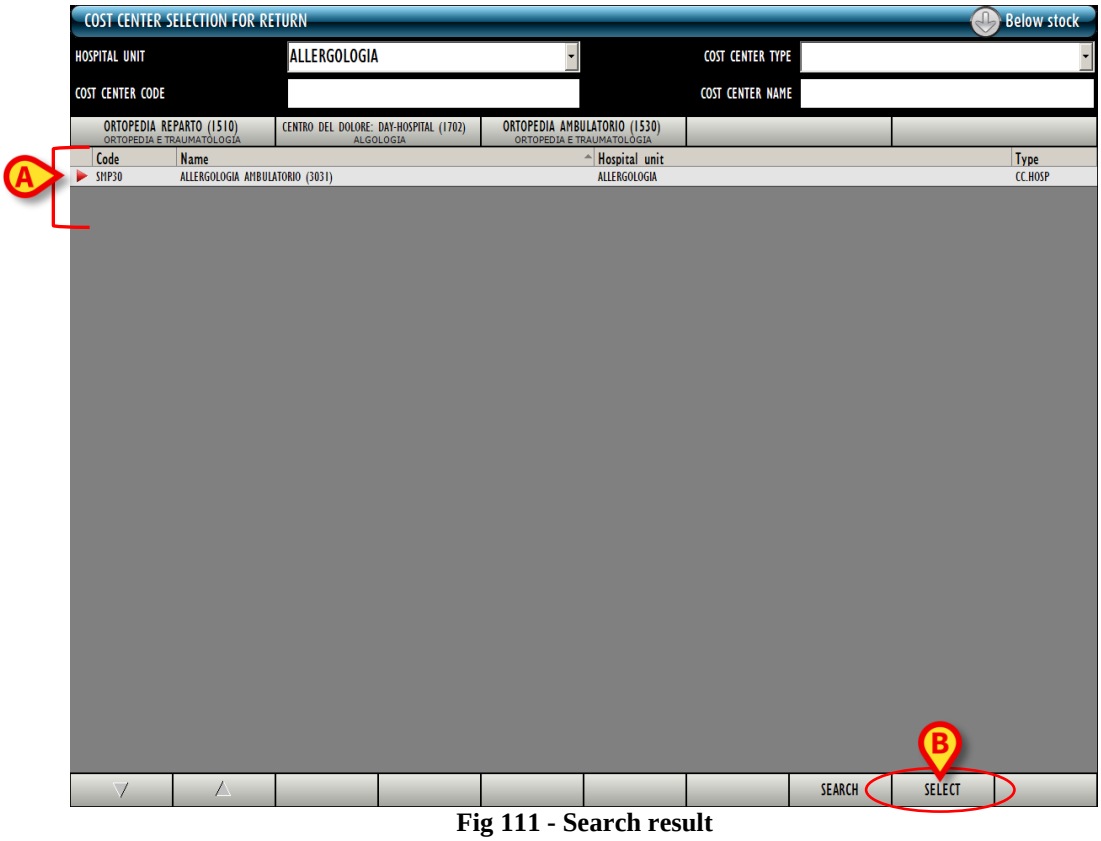


Fig 111 - Search result

- Click the row corresponding to the relevant cost center.

The ▶ arrow appears at the beginning of the row.

- Click the **Select** button on the command bar (Fig 111 **B**).

The screen making it possible to record the resources return will open ("Cost center for returns" - Fig 112). The screen is described in detail in paragraph 9.3. Paragraph 9.4 describes the procedure to perform to select the resources that must be returned.

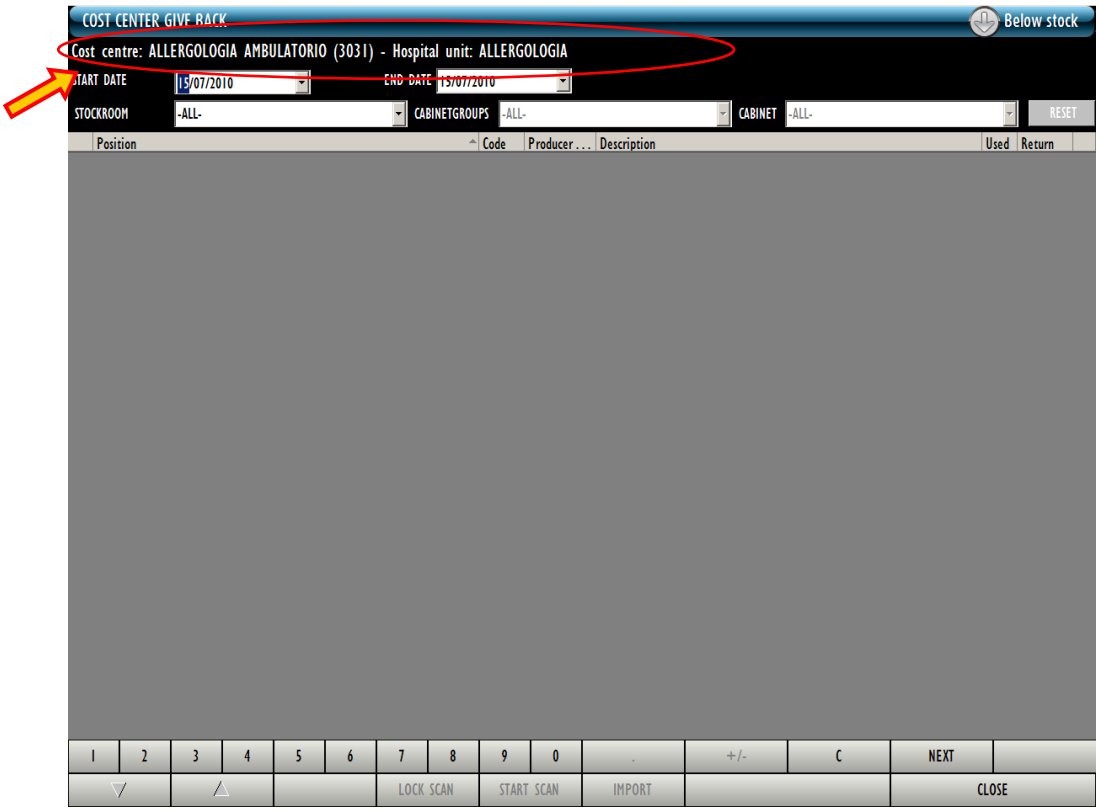


Fig 112 - Cost center for returns screen

9.2.1. "Recent" cost centers

The bar indicated in Fig 113 is formed of five buttons displaying the five most recent cost center selections.

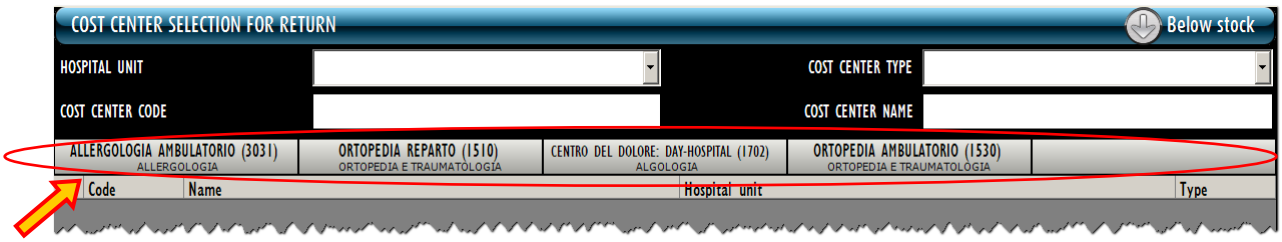


Fig 113

To select one of those cost centers again

- ➢ click the corresponding button.

The "Cost center for returns" module screen (Fig 112) will open, displaying under the header the name of the chosen cost center.

9.3. “Cost center for returns” screen description

The “Cost center for returns” screen is structured according to the general description offered in paragraph 1.4, see this paragraph for the screen general features. The present paragraph describes the screen specific features.

9.3.1. Filters

Fig 114 - Filters on the “Cost center for returns” screen

The available filters on this screen are:

- “Start date” and “End date” - make it possible to display only the resources picked during the specified period.
- “Stockroom” - displays only the resources picked ina specific stockroom.
- “Cabinet group” - displays only the resources picked ina specific cabinet group.
- “Cabinet” - displays only the resources picked in a specific cabinet.

See paragraph 1.4.2 for instructions on how the filters work in the “Stock Management” system.

9.3.2. Data area

The “Cost center for returns” screen displays all the resources picked for the cost center previously selected during the period specified by the “Start date” and “End date” filters (Fig 115).

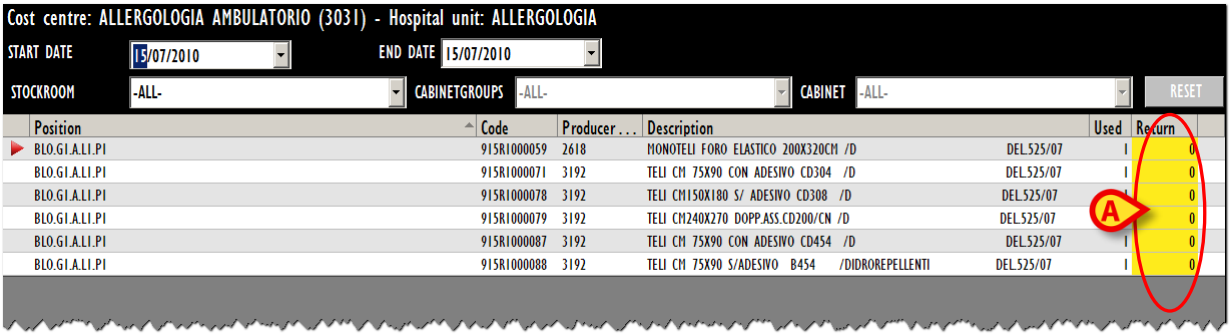


Fig 115

Each row corresponds to a resource. For each resource the following data can be displayed:

- resource position (not editable);
- resource code (not editable);
- manufacturer code (not editable);
- description (not editable);
- picked quantity (not editable);

- quantity to be returned.

> *Not all the information is always specified. The kind of information available depends on the configuration chosen and the procedures in use.*

The ▶ arrow appearing at the beginning of a row indicates the selected resource. The only editable item on this screen is the quantity of items that must be returned. the corresponding cell is highlighted yellow if no value is displayed (Fig 115 **A**). When a value is specified, before clicking the **Update** button on the command bar, the cell is highlighted light blue (Fig 116).

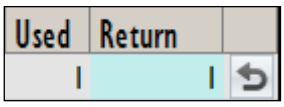


Fig 116

The icon is an "Undo" button. Click the icon to annul the editing performed since and to bring back the row to its original state.

See paragraph 9.4 for the "Returns" specification procedure.

9.3.3. The "Cost center for returns" screen command bar

The command bar of the "Cost center for returns" screen (Fig 117) makes it possible to manage the screen contents.

Fig 117

The numeric buttons make it possible to specify the quantities to be returned (Fig 118).

Fig 118 - Numeric buttons

Click one of the numbers to write the number in the "Return" field (Fig 115 **A**).

The " **.** " button is a decimal divider. The button is active only if decimal specification is relevant.
The "**+/-**" button makes it possible to specify whether a value is negative or positive. The button is active only if negative values specification is relevant.

The " **C** " button brings back to zero the specified quantities.

The **Succ.** button selects the item following the one currently selected.

Use the arrow buttons ▼ and ▲ to scroll up and down the screen contents in case the items are too many to be displayed all together.

The other buttons are not active on this screen.

Use the **Close** button to close the current screen.

When editing the screen contents the **Update** and **Cancel** buttons appear on the command bar.

The **Update** button saves the changes made. After every editing of the screen contents it is necessary to click the **Update** button to save the changes.

The **Cancel** button annuls all the changes made.

9.4. How to record a "Return"

To record a returned resource, on the "Cost center for return" screen (Fig 112).

- Click the row corresponding to the resource to be returned.

The row will be selected, the icon appears at the beginning of the row.

- Use the numeric buttons on the command bar to specify the resource quantity.
- Click the **Update** button on the command bar.

Or

- Click the "Return" cell on the row corresponding to the resource to be returned.

The corresponding row is selected, the icon appears at the beginning of the row.

The quantity inside the cell is highlighted.

- Use the workstation keyboard to set the quantities.
- Click the **Update** button on the command bar.

After clicking on **Update** the quantities specified in the "Used" cell are updated according to the new values. I.e.: if 5 items are picked of a certain resource and 2 items are returned, the "Used" cell, after updating, specifies "3".

If the quantity of items returned is equal to or bigger than the quantity of picked items, the row corresponding to the resource disappears from the list displayed on screen.

9.4.1. Barcode reading for the "Return" procedure

When the “Cost center for returns” screen is displayed the barcode reader can be used as search and selection tool.

Reading the barcode of the resource that must be returned brings the corresponding row to the first place in the list of resources displayed on screen. The quantity is increased (one unit).

To use this procedure

- read the barcode of the resource that must be returned.

The corresponding row is displayed on top of the resources list, the quantity displayed in the “Return” cell is increased of one unit.

- Click the **Update** button on the command bar.

10. Resources allocation

The “Resources al location” module makes it possible to record those changes in the cabinet configuration regarding the allocation of resources.

In the Stock Management system each cabinet is configured to contain only specific resources (and not others). That means that a certain resource can be allocated, by configuration, in certain cabinets and not in others. The “Resources alloctaion” module makes it possible to specify that a certain resource is not allocated anymore in a cabinet selected as “source” and is allocated from now on in a specified “destination” cabinet.

I.e. the module records that the possibility itself, for a resource, to be in a certain cabinet, is moved to another cabinet. Cabinet configuration this way changes.

Riallocating a resource with this module moves all the units of the resource specified that are in the source cabinet to the destination cabinet.

The “Resources allocation” module cannot be used to record the movement of a certain quantity of resource from a cabinet to another. For this purpose use the “Materials transfer” module described in paragraph 3.

To select the module

- click the icon

on the lateral bar.

The following screen opens (Fig 119):

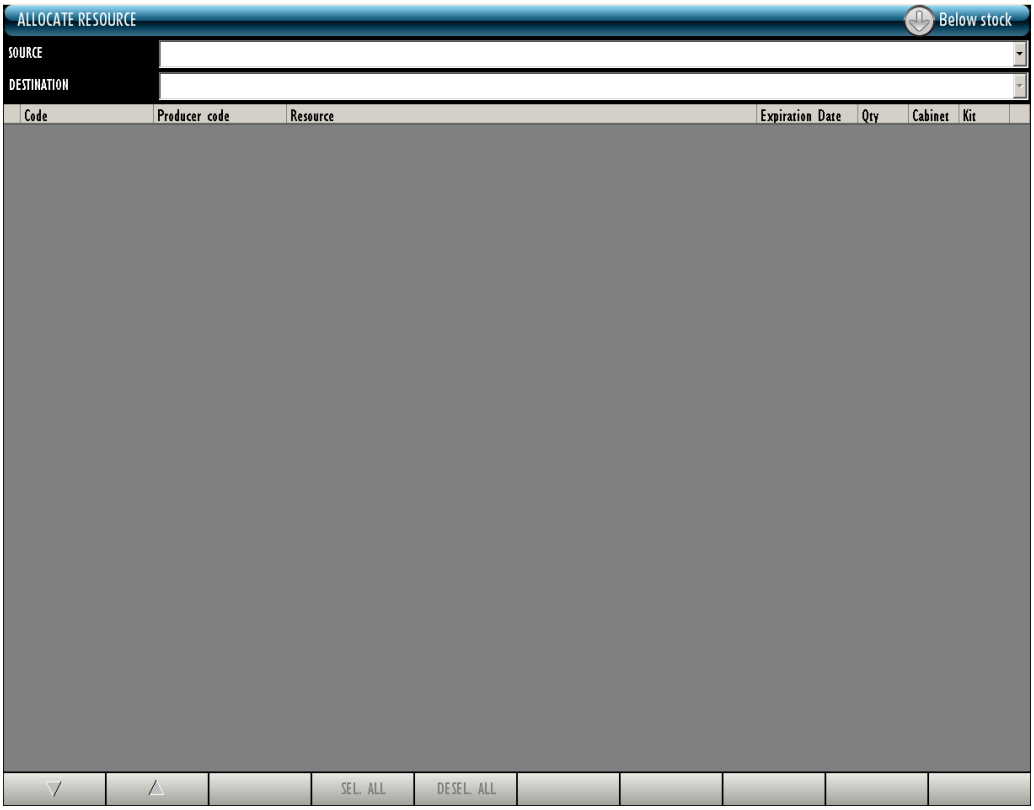


Fig 119 - Resources allocation

10.1. Resources allocation - screen structure

The "Resources allocation" screen is structured according to the general description offered in paragraph 1.4, see this paragraph for the screen general features. The present paragraph describes the screen specific features.

10.1.1. Source and destination specification

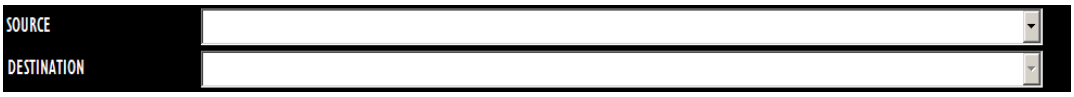


Fig 120 - Filters on the "Resources allocation" screen

The filters available on the "Resources allocation" screen (Fig 120) are:

- "Source" - Selects the source cabinet.
- "Destination" - Selects the destination cabinet.

See paragraph 1.4.2 for instructions on how the filters work.

10.1.2. Data area

After the “Source” and “Destination” cabinet are selected, the data area displays the list of resources that can be reallocated from the selected source to the selected destination (Fig 121 **A**).

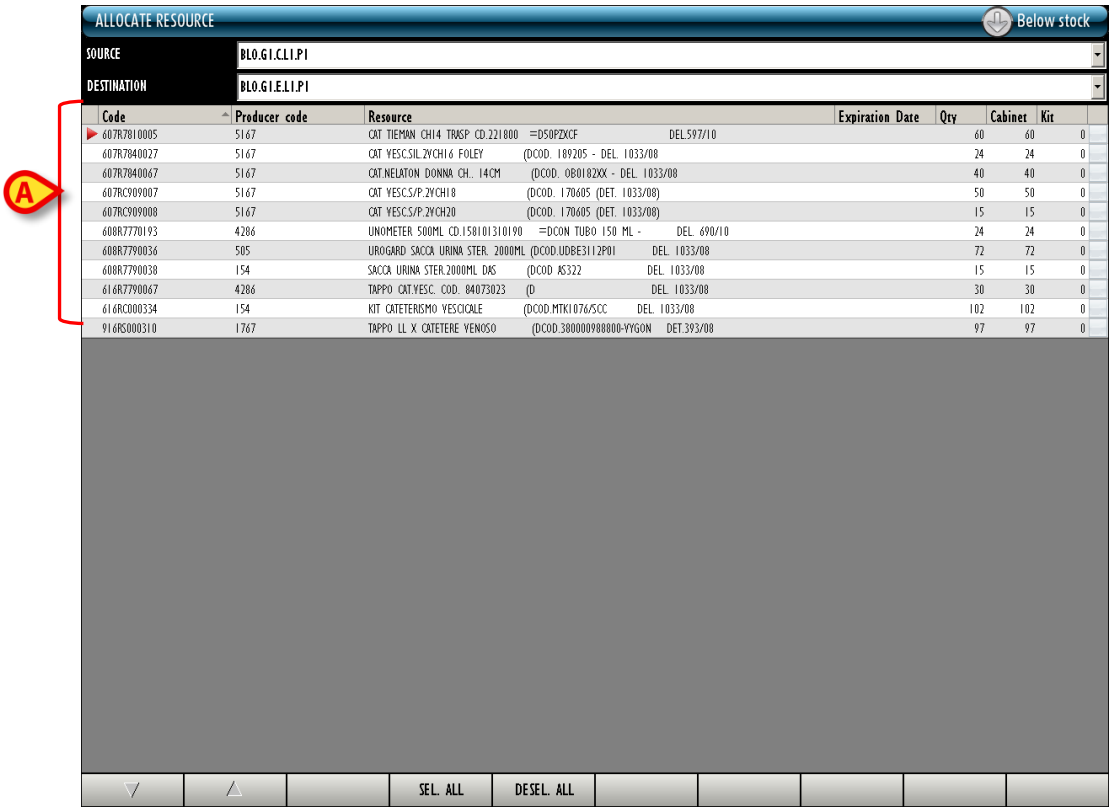


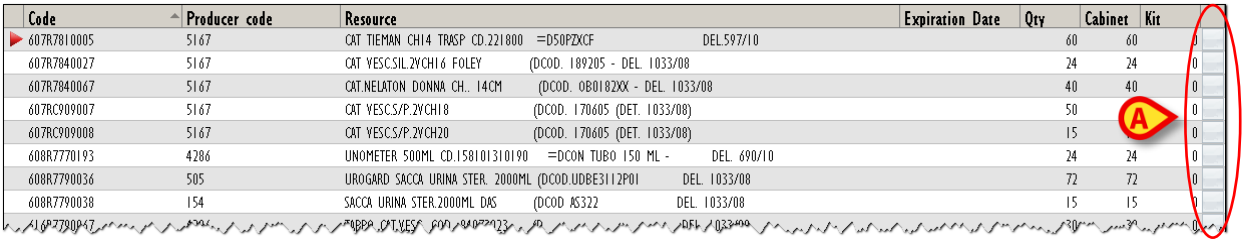
Fig 121 - Resources allocation

Each row corresponds to a resource. For each resource the following data can be displayed:

- resource code (not editable);
- manufacturer code (not editable);
- resource description (not editable);
- total quantity in stock (not editable);
- quantity located in the cabinets (not editable);
- quantity located in the generic kits already prepared (not editable).

Not all the information is always specified. The kind of information available depends on the configuration chosen and the procedures in use.

The checkboxes on the right (Fig 122 **A**) indicate, when selected - ☑ - , that the corresponding resource will be reallocated.



Code	Producer code	Resource	Expiration Date	Qty	Cabinet	Kit	
607R7810005	5167	CAT TIEMAN CH14 TRASP CD.221800 =D50PZXCF DEL.597/10		60	60		0
607R7840027	5167	CAT VESC.SIL.2VCH16 FOLEY (DCOD. 189205 - DEL. 1033/08		24	24		0
607R7840067	5167	CAT.NELATON DONNA CH.. 14CM (DCOD. 0B0182XX - DEL. 1033/08		40	40		0
607RC909007	5167	CAT VESC.S/P.2VCH18 (DCOD. 170605 (DET. 1033/08)		50			0
607RC909008	5167	CAT VESC.S/P.2VCH20 (DCOD. 170605 (DET. 1033/08)		15			0
608R7770193	4286	UNOMETER 500ML CD.158101310190 =DCON TUBO 150 ML - DEL. 690/10		24	24		0
608R7790036	505	UROGARD SACCA URINA STER. 2000ML (DCOD.UDBE3112P01 DEL. 1033/08		72	72		0
608R7790038	154	SACCA URINA STER.2000ML DAS (DCOD AS322 DEL. 1033/08		15	15		0
616R7790047	[illegible]	[illegible]		[illegible]	[illegible]		0

Fig 122

The ▶ arrow appearing at the beginning of a row indicates that the correposnding resource is selected.

When the quantity in stock for a resource is less than the minimum quantity (indicated by configuration) the corresponding cell is highlighted red; when the quantity in stock for a resource is less than the ideal quantity (indicated by configuration) the corresponding cell is highlighted yellow.

10.1.3. The command bar of the “Resources allocation” screen

The command bar (Fig 123), formed of several buttons, makes it possible to manage the screen contents.

Fig 123 - Command bar

The numeric buttons on the upper line are not used on this screen (“Resources allocation”).

Use the arrow-buttons, when active, to scroll the screen contents up and down.

The **Sel. All** button selects all the items displayed on screen.

The **Desel. All** button deselects all the selected items.

When editing the screen contents the **Update** and **Cancel** buttons are displayed on the command bar.
The **Update** button saves the changes made. After every editing of the screen contents it is necessary to click the **Update** button to save the changes.
The **Cancel** button annuls all the changes made.

The command bar of the “Cost center for returns” screen (Fig 117) makes it possible to manage the screen contents.

10.2. How to change the resource allocation

To change the resource allocation

- click the

icon on the lateral bar to display the “Resources allocation” screen (Fig 124).

Please remember that the “Resources allocation” module cannot be used to record the movement of a certain quantity of resource from a cabinet to another. For this purpose use the “Materials transfer” module described in paragraph 3.

The following screen opens.

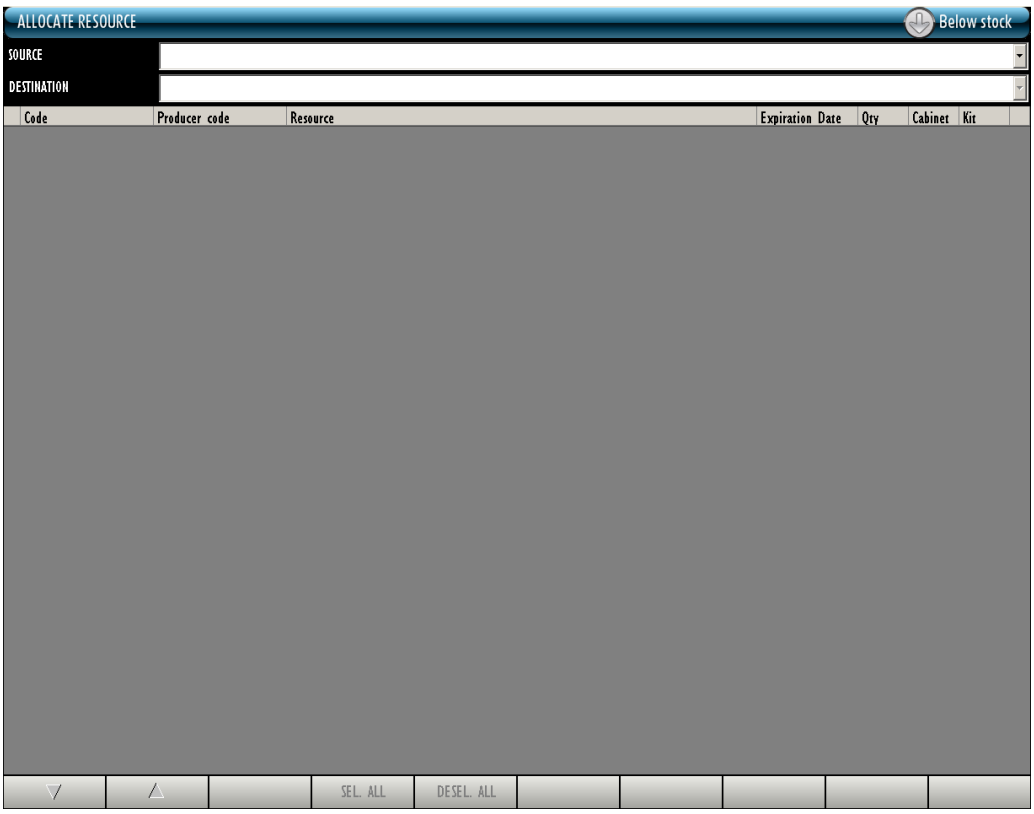


Fig 124 - Resources allocation

- Select the source cabinet (specify the “Source” field Fig 125 **A**).
- Select the destination cabinet (specify the “Destination” field Fig 125 **B**).

The data area displays the list of resources that can be reallocated (Fig 125 **C**).

Fig 125

- Click, on the right of the data area, the boxes corresponding to the resources that must be reallocated (Fig 126 **A**). The clicked boxes is selected - ✔ - .

Fig 126

- Click the **Update** button on the command bar (Fig 126 **B**).

The reallocation is this way completed.

A print report is automatically created. A print preview is displayed (Fig 127).

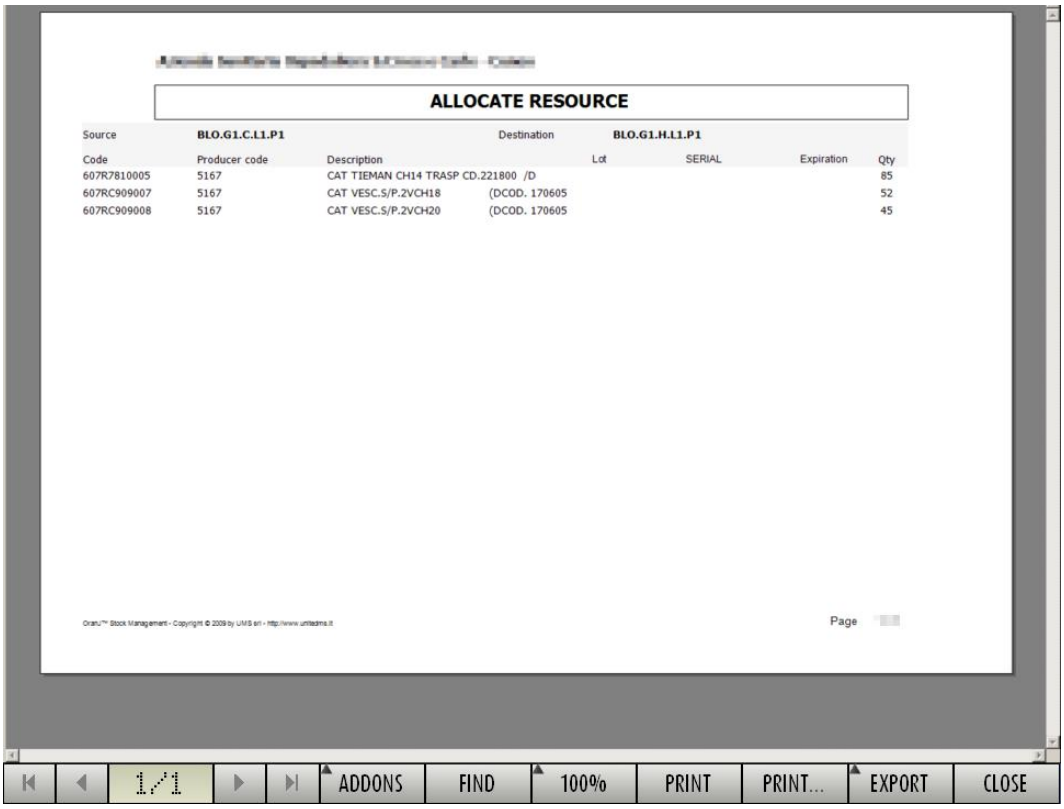


Fig 127 - Print preview

The **Close** button (Fig 127 **A**) closes the “Print preview” screen.

11. Orders sheet print

The “Orders” module makes it possible to create a document that can be used to order the materials.

To activate the “Orders” module,

- click the icon on the lateral bar.

The following screen opens,

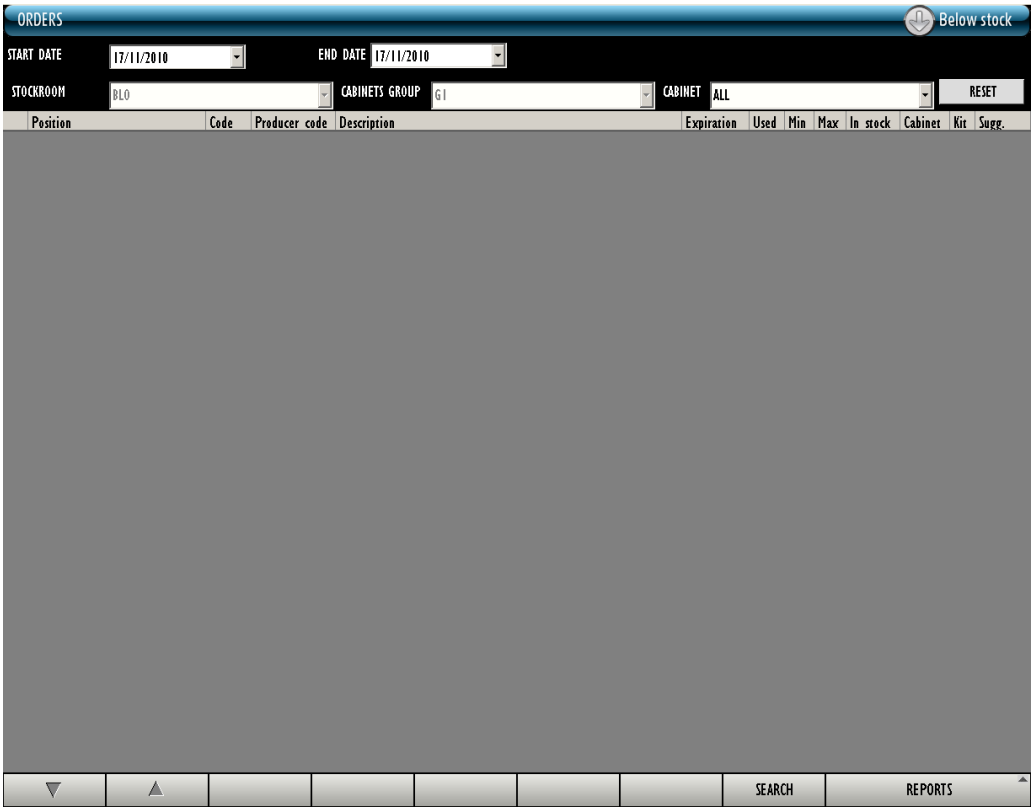


Fig 128 - Orders

11.1. “Orders” - screen structure

The “Orders” screen is structured according to the general description offered in paragraph 1.4, see this paragraph for the screen general features. The present paragraph describes the screen specific features.

11.1.1. Filters

Fig 129 - Filters on the "Orders" screen

The available filters on the "Orders" screen (Fig 129) are:

- "Start date - End date" - these fields make it possible to specify the time period to which the items displayed in the data area refer.
- "Stockroom" - it displays only the resources located in a specific stockroom.
- "Cabinets group" - it displays only the resources located in a specific cabinets group.
- "Cabinet" - it displays only the resources located in a specific cabinet.

See paragraph 1.4.2 for general instructions on how the filters work.

11.1.2. Data area

The data area of the "Orders" screen displays the list of resources used during the specified period and whose values correspond to those possibly specified in the other filters.

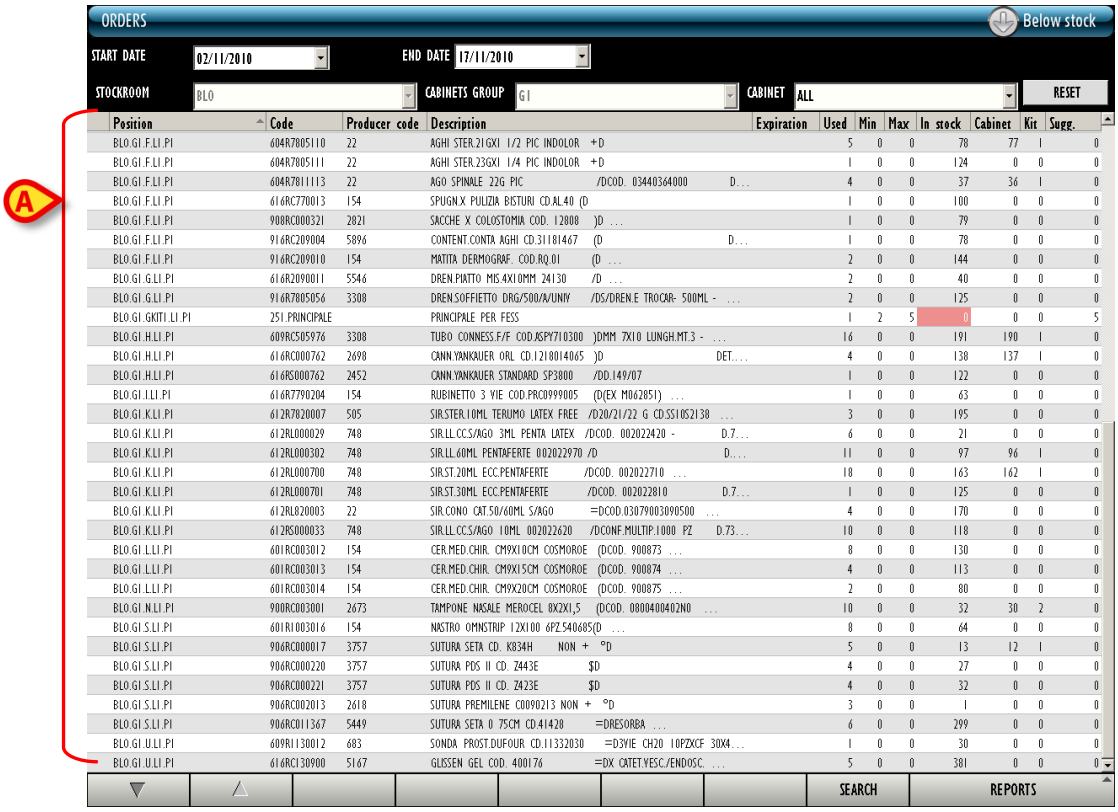


Fig 130 - Data area

Each row corresponds to a resource. For each resource the following information can be displayed:

- the resource position;
- the resource code;
- the producer code;

- the resource description;
- the quantity of resources used in the relevant period;
- the minimum quantity;
- the suggested quantity;
- the total quantity in stock;
- the quantity located in the cabinets;
- the quantity located in the generic kits already prepared;
- the suggested order quantity (this is the difference between the suggested quantity and the quantity in stock).

None of the values displayed can be modified by the user.

11.1.3. The command bar of the "Orders" screen

The command bar (Fig 131), formed of several buttons, makes it possible to manage the screen contents.

Fig 131 - Command bar

Use the arrow buttons and to scroll up and down the screen contents in case the items are too many to be displayed all together.
Use the **Search** button to search and display the list of items having the features specified in the filters described in paragraph 11.1.1.

The **Reports** button makes it possible to print the screen contents.

11.2. How to display and print the orders sheet

To display the list of resources,

- specify the search filters values (Fig 132 **A**).

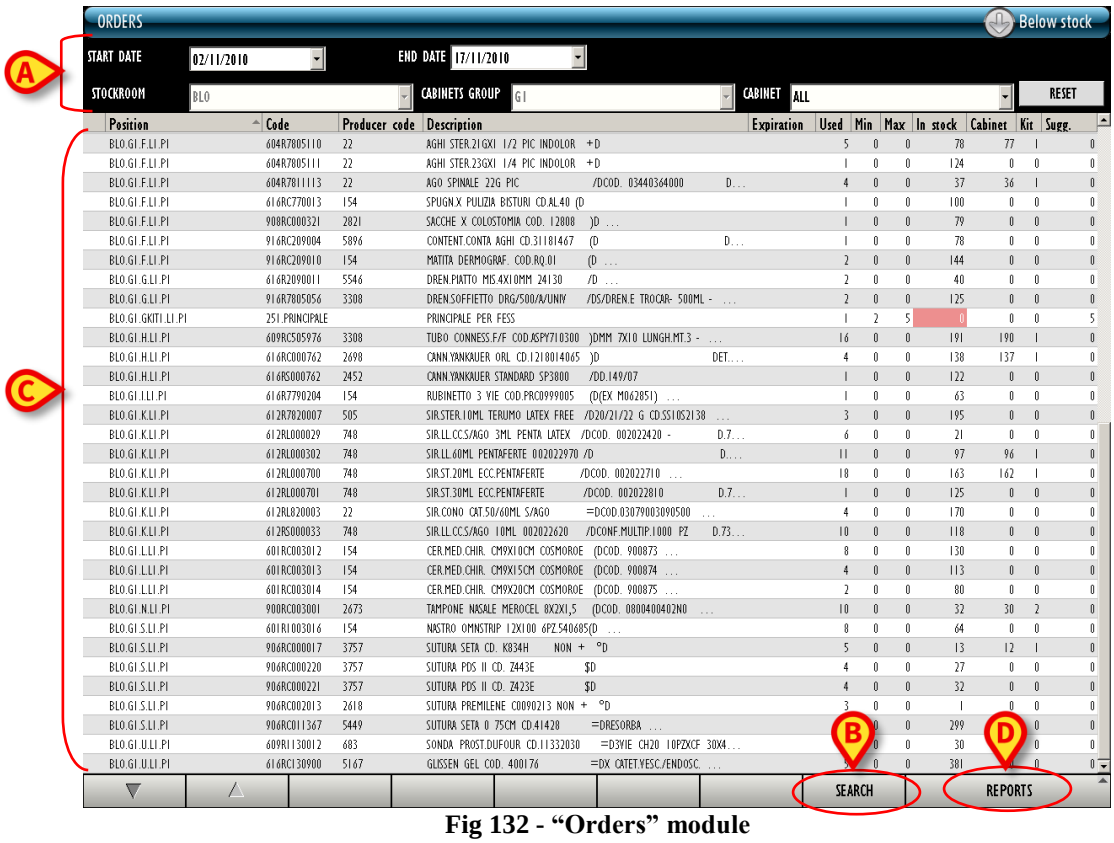


Fig 132 - "Orders" module

- Click the **Search** button on the command bar (Fig 132 **B**).

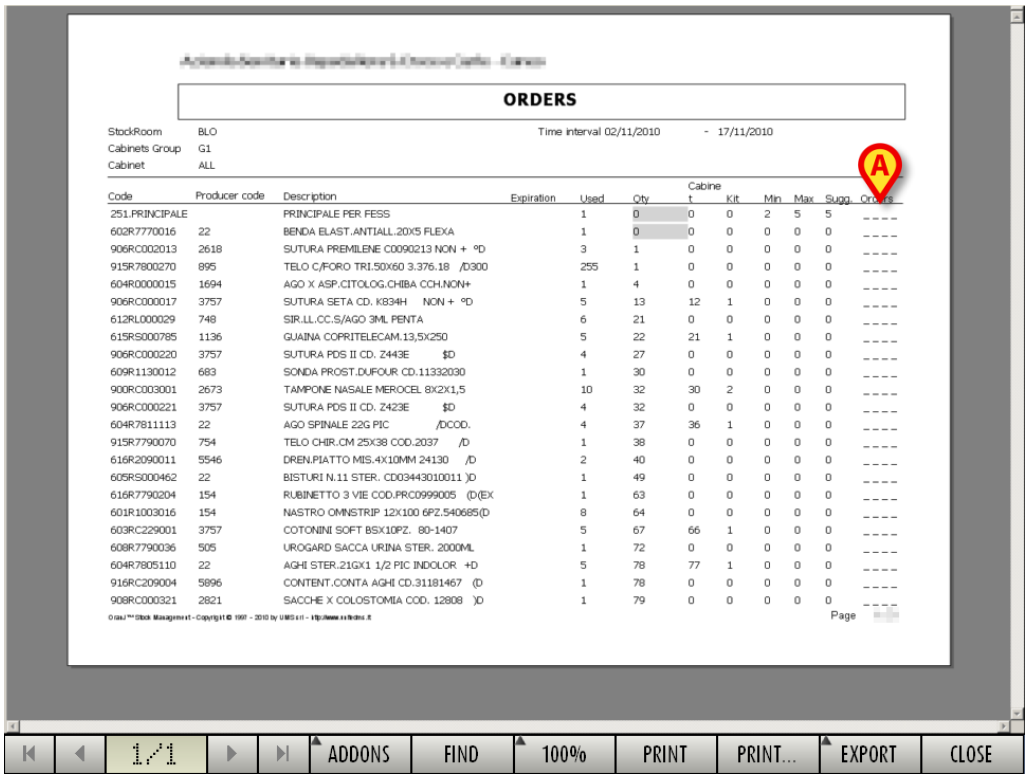
The list of resources whose features match with those specified in the filters is displayed (Fig 132 **C**).

- Click the **Reports** button on the command bar (Fig 132 **D**). The "Orders" option activates (Fig 133).

Fig 133

- Click the "Orders" option.

The print report is created. A print preview is displayed (Fig 134).



ORDERS

StockRoom BLO
Cabinets Group G1
Cabinet ALL

Time interval 02/11/2010 - 17/11/2010

Code	Producer code	Description	Expiration	Used	Qty	Cabinet	Kit	Min	Max	Sugg.	Orders
251.PRINCIPALE		PRINCIPALE PER FESS		1	0	0	0	2	5	5	____
602R7770016	22	BENDA ELAST.ANTIALL.20X5 FLEXA		1	0	0	0	0	0	0	____
906RC002013	2618	SUTURA PREMILENE C0090213 NON + °D		3	1	0	0	0	0	0	____
915R7800270	895	TELO C/FORO TRI.50X60 3.376.18 /D300		255	1	0	0	0	0	0	____
604R0000015	1694	AGO X ASP.CITOLOG.CHIBA CCH.NON+		1	4	0	0	0	0	0	____
906RC000017	3757	SUTURA SETA CD. K834H NON + °D		5	13	12	1	0	0	0	____
612RL000029	748	SIR.LL.CC.S/AGO 3ML PENTA		6	21	0	0	0	0	0	____
615RS000785	1136	GUAINA COPRITELECAM.13,5X250		5	22	21	1	0	0	0	____
906RC000220	3757	SUTURA PDS II CD. Z443E $D		4	27	0	0	0	0	0	____
609R1130012	683	SONDA PROST.DUFOUR CD.11332030		1	30	0	0	0	0	0	____
900RC003001	2673	TAMPONE NASALE MEROCEL 8X2X1,5		10	32	30	2	0	0	0	____
906RC000221	3757	SUTURA PDS II CD. Z423E $D		4	32	0	0	0	0	0	____
604R7811113	22	AGO SPINALE 22G PIC /DCOD.		4	37	36	1	0	0	0	____
915R7790070	754	TELO CHIR.CM 25X38 COD.2037 /D		1	38	0	0	0	0	0	____
616R2090011	5546	DREN.PIATTO MIS.4X10MM 24130 /D		2	40	0	0	0	0	0	____
605RS000462	22	BISTURI N.11 STER. CD03443010011)D		1	49	0	0	0	0	0	____
616R7790204	154	RUBINETTO 3 VIE COD.PRC0999005 (D(EX		1	63	0	0	0	0	0	____
601R1003016	154	NASTRO OMNSTRIP 12X100 6PZ.540685(D		8	64	0	0	0	0	0	____
603RC229001	3757	COTONINI SOFT BSX10PZ. 80-1407		5	67	66	1	0	0	0	____
608R7790036	505	UROGARD SACCA URINA STER. 2000ML		1	72	0	0	0	0	0	____
604R7805110	22	AGHI STER.21GX1 1/2 PIC INDOLOR +D		5	78	77	1	0	0	0	____
916RC209004	5896	CONTENT.CONTA AGHI CD.31181467 (D		1	78	0	0	0	0	0	____
908RC000321	2821	SACCHE X COLOSTOMIA COD. 12808)D		1	79	0	0	0	0	0	____

Page

Fig 134

The last column on the right can be used to specify the quantities to be ordered (Fig 134 **A**).

12. Operation attribution of returned resources

The “Returns for operation” module makes it possible to record the returned resources (“Returns” from now on) and attribute them automatically to a specific operation.

To select the module

- click the corresponding icon

.

The following screen opens (Fig 135).

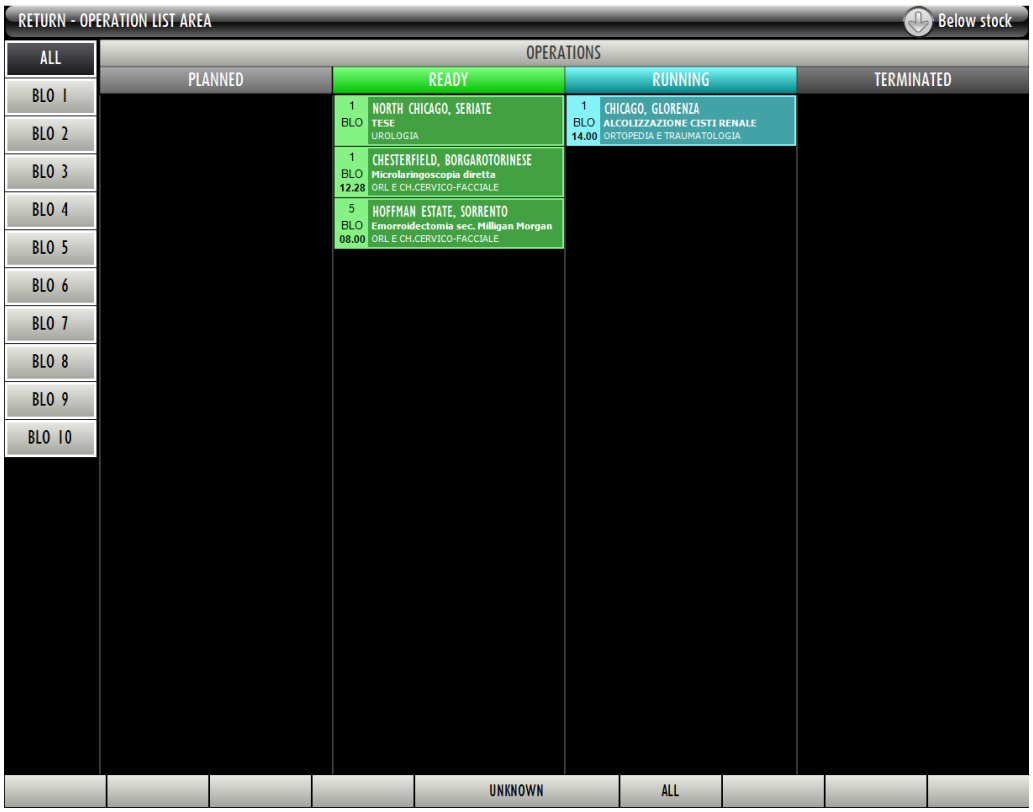


Fig 135 - Operation list

12.1. Operation list - Screen description

The “Operation list” screen displays all the operations scheduled for the current day in the block (or blocks) covered by the system and for which there are picked resources recorded. The operations are represented as rectangles (Fig 136).

Fig 136 - Operation rectangle

On the left of the rectangles the planned room, block and time are displayed (Fig 136 **A**).

The room, block and time can be unspecified. Inthese cases the operation is a "Reserve". "Reserves" are described in detail in the user manuals of the DIGISTAT® Smart Scheduler and OranJ systems. See these documents for more details.

The number and kind of information displayed in the operation rectangle do not affect the DIGISTAT® Stock Management procedures.

The patient name, the planned operation and the requesting hospital unit are displayed on the right of the operation rectangle (Fig 136 **B**).

The type of information displayed on the operation rectangle can be changed by configuration. refer to your system administrator for more information.

The colour of the operation-rectangle indicates the state of the operation:

- light grey characterizes "planned" operations;
- green characterizes "ready" operations;
- cyan characterizes "in progress" operations;
- dark grey characterizes "completed" operations.

The rectangles corresponding to emergencies are characyerized by a red border (Fig 137).

Fig 137

It is not possible to attribute a "return" to a completed operation. The operation state does not affect in any other way the DIGISTAT® Stock Management procedures.

The operation states are described in detail in the DIGISTAT® Smart Scheduler and DIGISTAT® OranJ systems user manuals.

The operation rectangles are divided into four columns. Each of them contains the operations having the same state. The state is specified in the column header (Fig 138).

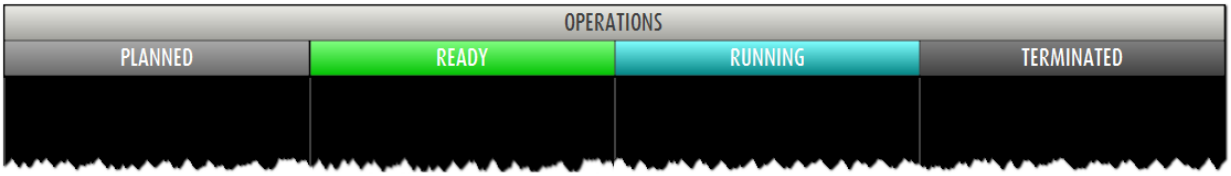


Fig 138

On the left of the screen a list of buttons makes it possible to filter the operations displayed (Fig 139).

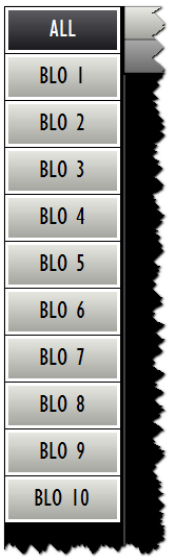


Fig 139 - Filter buttons

Each button corresponds to a room.

Click a button to display only the operations of the corresponding room.
The selected button appears highlighted.
The **All** button displays the complete list again.

The **Unknown** button on the command bar activates the “unknown operation return” procedure, described in paragraph 12.5.

12.2. Operation selection

To select the operation to which the “return” will be attributed

- click the corresponding rectangle (Fig 140).

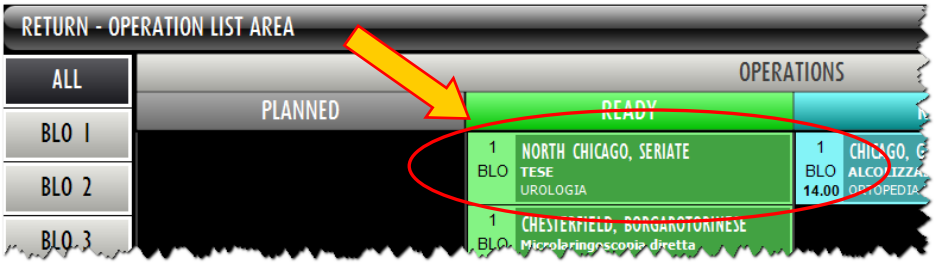


Fig 140 - Operation rectangle

The screen making it possible to record the “returns” will open (Fig 141).

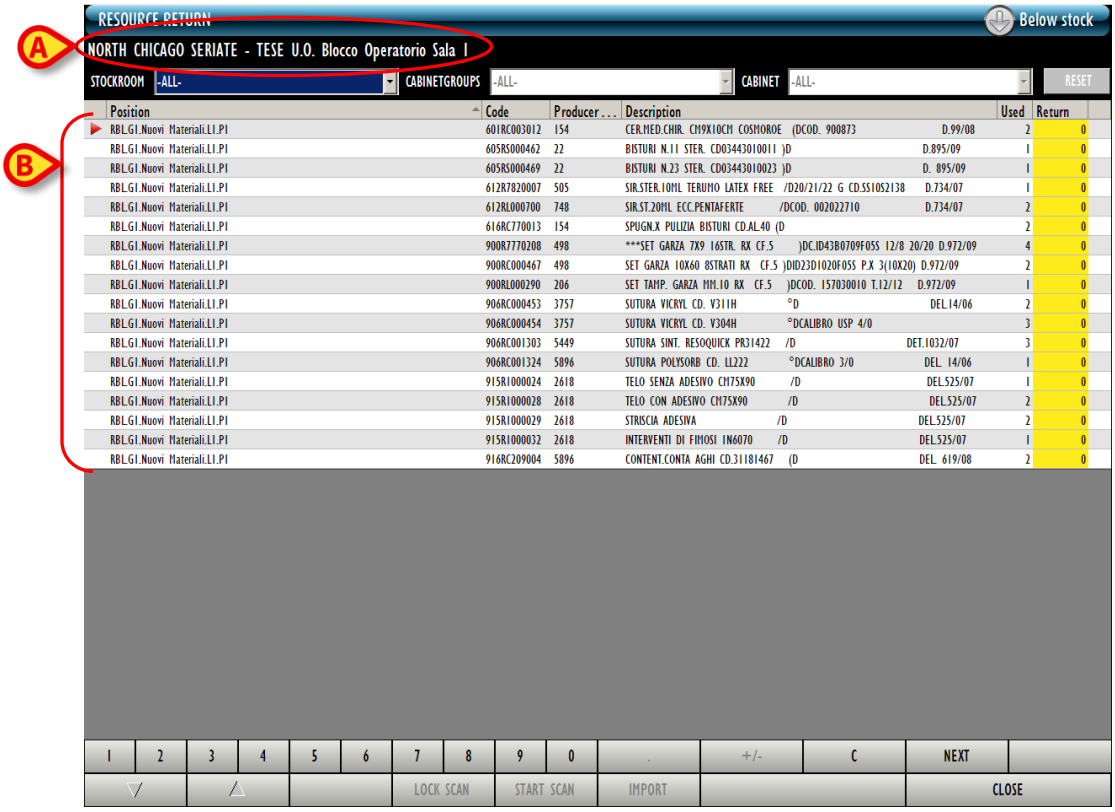


Fig 141 - “Returns from operation” screen

On the top-left corner of the screen are displayed the data of the operation to which the “return” will be attributed (Fig 141 **A**).

The data area displays the list of all the resources picked for the selected operation (Fig 141 **B**).

12.3. “Returns from operation”: screen structure

The “Returns from operation” screen is structured according to the general description offered in paragraph 1.4, see this paragraph for the screen general features. The present paragraph describes the screen specific features.

12.3.1. Filters

Fig 142 - Filters on the “Returns from operation” screen

The filters available on this screen are:

- “Stockroom” - displays only the resources picked from a specific stockroom.
- “Cabinet group” - displays only the resources picked from a specific cabinet group.
- “Cabinet” - displays only the resources picked from a specific cabinet.

See paragraph 1.4.2 for instructions on the filters in the “Stock Management” system.

12.3.2. Data area

The data area, if no filter is specified, displays the list of all the resources picked for the selected operation (Fig 143).

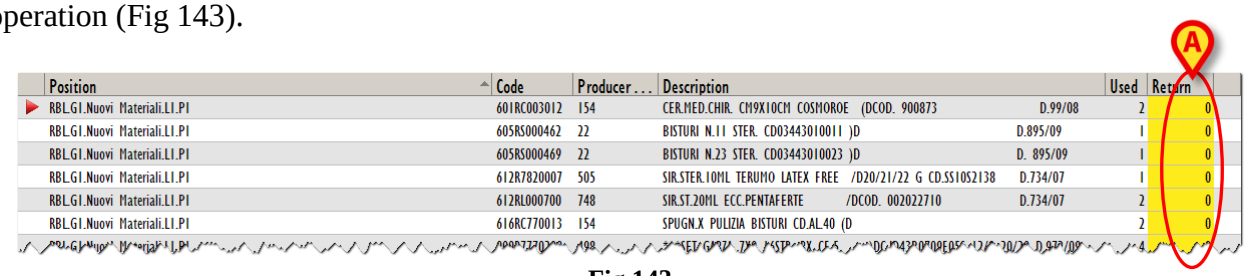


Fig 143

Each row corresponds to a resource. For each resource the following data can be displayed:

- resource position (not editable);
- resource code (not editable);
- manufacturer code (not editable);
- description (not editable);
- the lot (if enabled by configuration - not editable);
- the expiration date (if enabled by configuration - not editable);
- the serial number (if enabled by configuration - not editable);
- used quantity (not editable);
- quantity to be returned.

Not all the information is always specified. The kind of information available depends on the configuration chosen and the procedures in use.

The arrow appearing at the beginning of a row indicates the selected resource. The only editable item on this screen is the quantity of items that must be returned. the corresponding cell is highlighted yellow if no value is displayed (Fig 143 **A**). When a value is specified, before clicking the **Update** button on the command bar, the cell is highlighted light blue (Fig 144).

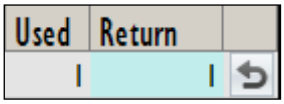


Fig 144

The icon is an "Undo" button. Click the icon to annul the editing performed since and to bring back the row to its original state.

See paragraph 12.4 for the "Returns" specification procedure.

12.3.3. The command bar of the "Returns from operation" screen

The command bar on the "Returns from operation" screen (Fig 145) contains the buttons making it possible to manage the screen contents.

Fig 145

The numeric buttons on the upper line of the command bar (Fig 146) can be used to insert the resource quantities.

Fig 146 - Numeric buttons

Click one of the numbers to write it in the "Return" field (Fig 143 **A**).

The " **.** " button is a decimal divider. The button is active only if decimal specification is relevant.
The "**+/-**" button makes it possible to specify whether a value is negative or positive. The button is active only if negative values specification is relevant.

The " **C** " button brings back to zero the specified quantities.

The **Next** button selects the item following the one currently selected.

Use the arrow buttons and to scroll up and down the screen contents in case the items are too many to be displayed all together.

The other buttons are not active on this screen.

Use the **Close** button to close the current screen.

When editing the screen contents the **Update** and **Cancel** buttons appear on the command bar.

The **Update** button saves the changes made. After every editing of the screen contents it is necessary to click the **Update** button to save the changes.

The **Cancel** button annuls all the changes made.

12.4. How to record the returned resources

To record a returned resource, on the "Returns from operation" screen (Fig 141).

- Click the row corresponding to the resource to be returned.

The row is selected, the icon appears at the beginning of the row.

- Use the numeric buttons on the command bar to specify the resource quantity.
- Click the **Update** button on the command bar.

Otherwise you can

- click the "Return" cell on the row corresponding to the resource to be returned.

The corresponding row is this way selected, the icon appears at the beginning of the row.

- Use either the numeric buttons or the workstation keyboard to set the quantities.
- Click the **Update** button on the command bar.

After clicking the **Update** button, the quantities specified in the "Used" cell are updated according to the new values. I.e.: if 5 items are picked of a certain resource and 2 items are returned, the "Used" cell, after updating, specifies "3".

If the quantity of items returned is equal or bigger than the quantity of picked items, the row corresponding to the resource disappears from the list displayed on screen.

12.4.1. Barcode reading in the "Return" procedure

When the "Returns from operation" screen is displayed the barcode reader can be used as search and selection tool. Reading the barcode of the resource that must be returned brings the corresponding row to the first place in the list of resources displayed on screen. The quantity is increased (one unit).

To perform this procedure

- scan the barcode of the resource that must be returned.

The corresponding row is displayed on top of the resources list, the quantity displayed in the "Returne" cell is increased of one unit.

- Click the **Update** button on the command bar.

12.5. Returned resources from unknown operation

When returning a resource picked for unknown operation:

- select the "Returns from operation" module by clicking the icon on the lateral bar.

The "Operation list" screen opens (Fig 147):

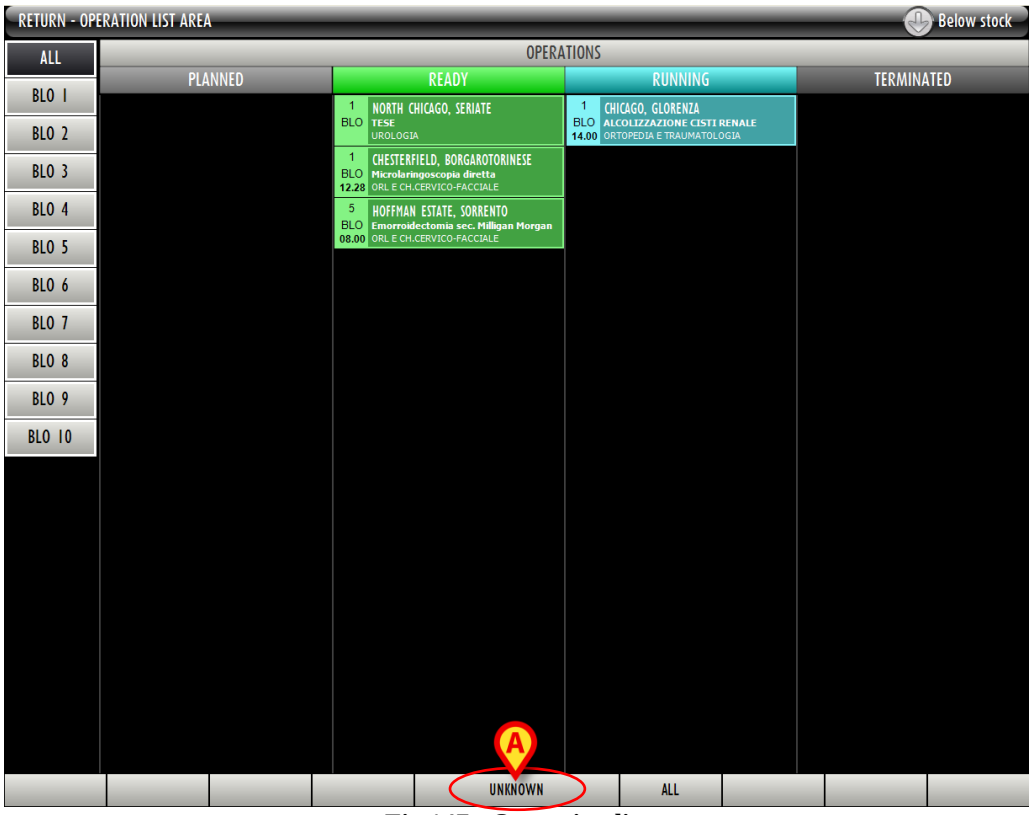


Fig 147 - Operation list

- Click the **Unknown** button on the command bar (Fig 147 **A**).

The "Returns from operation" screen will open (Fig 148). The indication "unknown operation" appears on top of the screen instead of the indication of the selected operation (Fig 148 **A**).

The screen displays the list of all the resources picked for unknown operation.

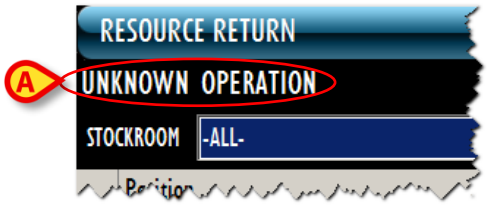


Fig 148

To record the “Returns” use the procedures described in paragraphs 12.4 and 12.4.1.

12.6. Display all the picked resources

The **All** button on the command bar (Fig 149 **A**) displays the list of all the resources picked in the selected period. All the pickings are displayed: those associated to the operations, those associated to the cost centers, those associated to any other possible relevant entity.

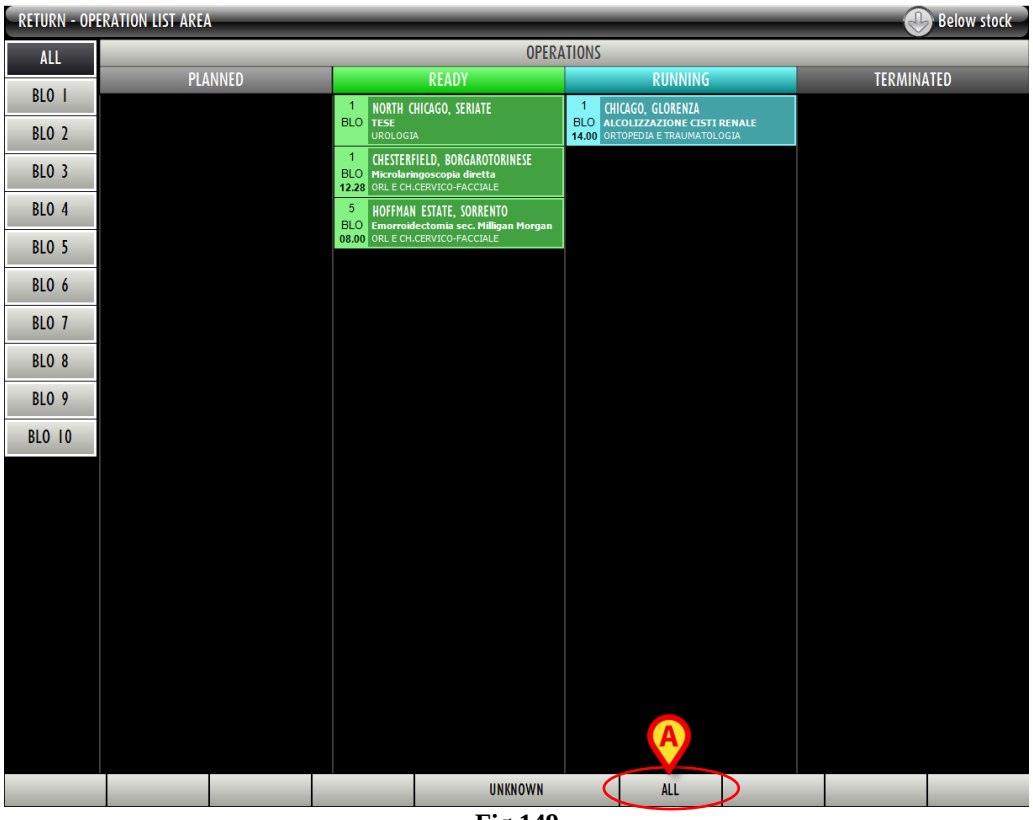


Fig 149

To display the list of all pickings

- click the **All** button on the command bar (Fig 149 **A**).

The following screen opens (Fig 150)

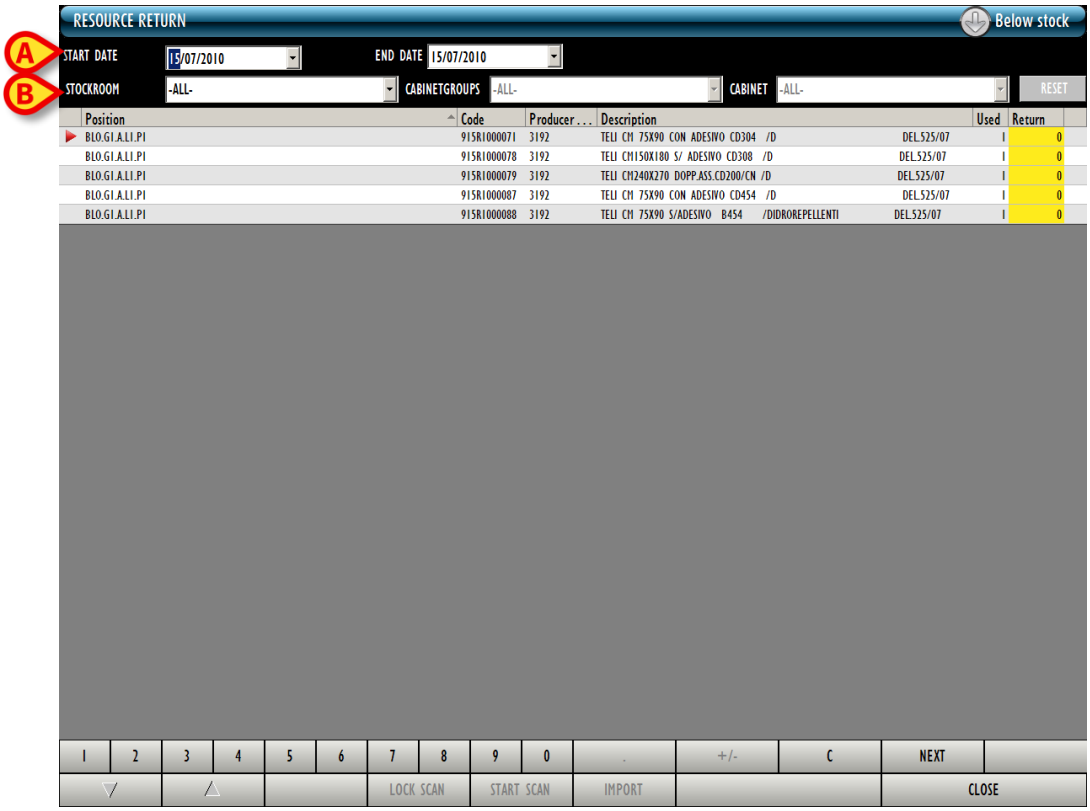


Fig 150 - All the picked resources

Use the “Start date” and “End date” filters (Fig 150 **A**) to select the relevant period of time. Only the resources picked in the period indicated are displayed. Use the other filters (Fig 150 **B**) to display the pickings relating to a specific stockroom, cabinets group or cabinet.

Use the procedures described in paragraphs 12.4 and 12.4.1.

13. Waste management

The “Waste” module makes it possible to record the waste of picked materials that are not used and that, at the same time, cannot be returned (for example: broken materials). The wasted resources are automatically associated to a specific operation.

To select the module

- click the corresponding icon .

The following screen opens (Fig 151 - List of operation).

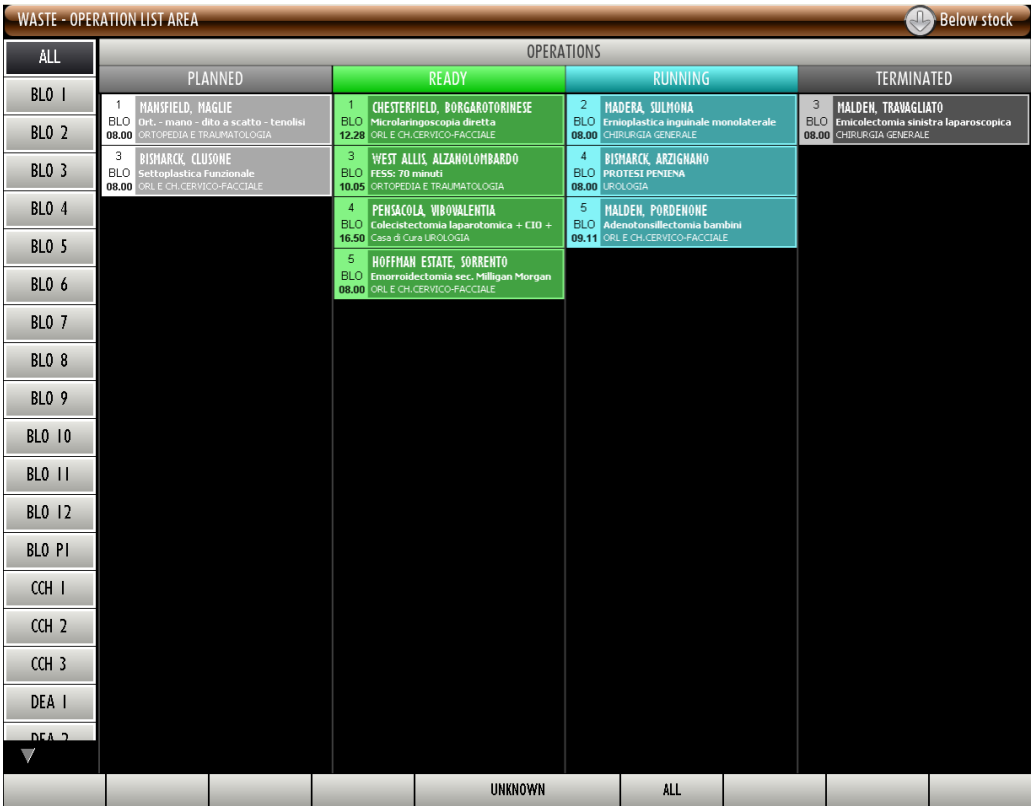


Fig 151 - List of operations

13.1. List of operations - Screen description

The “Operation list” screen displays all the operations scheduled for the current day in the block (or blocks) covered by the system and for which there are picked resources recorded. The operations are represented as rectangles (Fig 152).

Fig 152 - Operation rectangle

On the left of the rectangles the planned room, block and time are displayed (Fig 152 **A**).

The room, block and time can be unspecified. Inthese cases the operation is a "Reserve". "Reserves" are described in detail in the user manuals of the DIGISTAT® Smart Scheduler and OranJ systems. See these documents for more details.

The number and kind of information displayed in the operation rectangle do not affect the DIGISTAT® Stock Management procedures.

The patient name, the planned operation and the requesting hospital unit are displayed on the right of the operation rectangle (Fig 152 **B**).

The type of information displayed on the operation rectangle can be changed by configuration. refer to your system administrator for more information.

The colour of the operation-rectangle indicates the state of the operation:

- light grey characterizes "planned" operations;
- green characterizes "ready" operations;
- cyan characterizes "in progress" operations;
- dark grey characterizes "completed" operations.

The rectangles corresponding to emergencies are characyerized by a red border (Fig 153).

Fig 153

It is not possible to attribute a "return" to a completed operation. The operation state does not affect in any other way the DIGISTAT® Stock Management procedures.

The operation states are described in detail in the DIGISTAT® Smart Scheduler and DIGISTAT® OranJ systems user manuals.

The operation rectangles are divided into four columns. Each of them contains the operations having the same state. The state is specified in the column header (Fig 154).

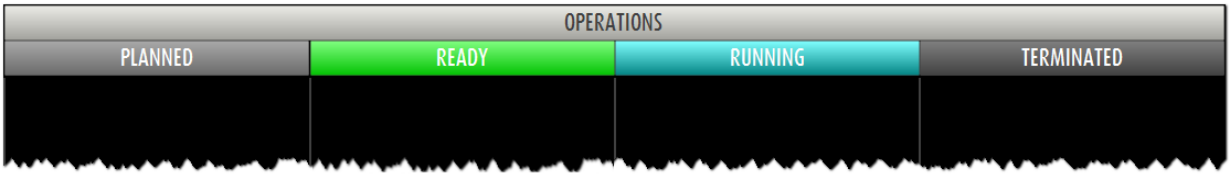


Fig 154

On the left of the screen a list of buttons makes it possible to filter the operations displayed (Fig 155).

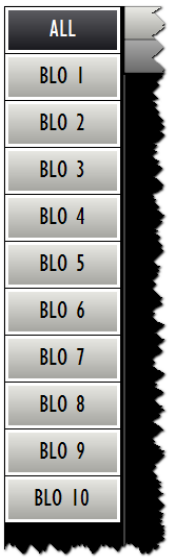


Fig 155 - Filter buttons

Each button corresponds to a room.

Click a button to display only the operations of the corresponding room.
The selected button appears highlighted.
The **All** button displays the complete list again.

The **Unknown** button on the command bar activates the “unknown operation return” procedure, described in paragraph 13.5.

13.2. Operation selection

To select the operation to which the “waste” is attributed

- click the box corresponding to the operation (Fig 156).

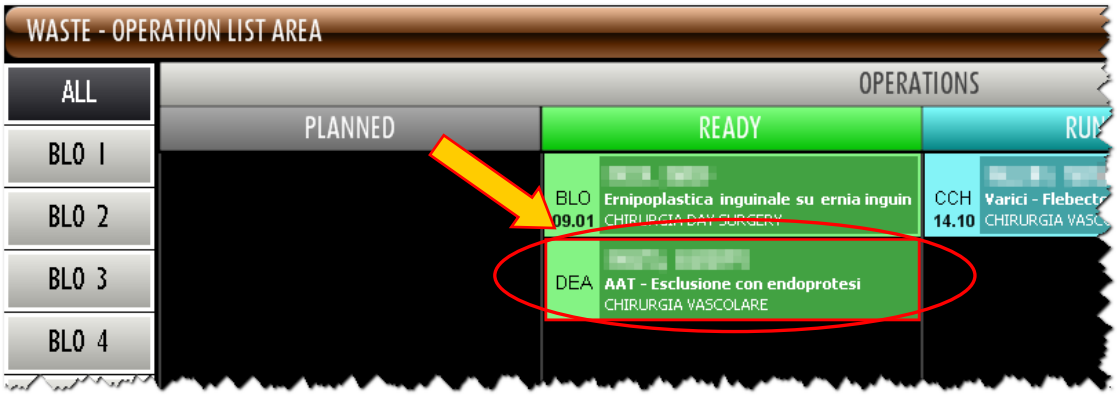


Fig 156 - Operation-rectangle

The “Resource waste” screen opens (Fig 157).

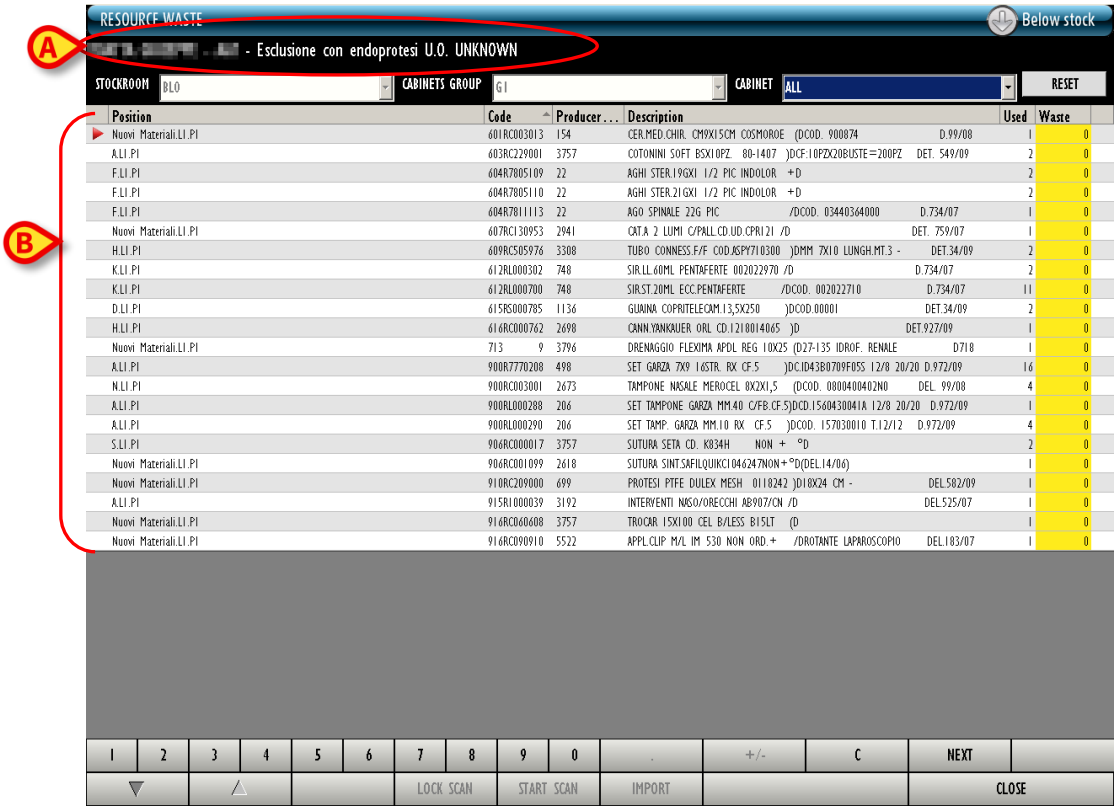


Fig 157 - Resource waste management

On the top-left corner of the screen are displayed the main data of the operation to which the wasted materials will be associated (Fig 157 **A**).

The data area displays the list of all the resources picked for the selected operation (Fig 157 **B**).

13.3. Wasted materials management: screen structure

The “Wasted materials management” screen is structured according to the general description offered in paragraph 1.4, see this paragraph for the screen general features. The present paragraph describes the screen specific features.

13.3.1. Filters

Fig 158 - Filters on the “Wasted materials management ” screen

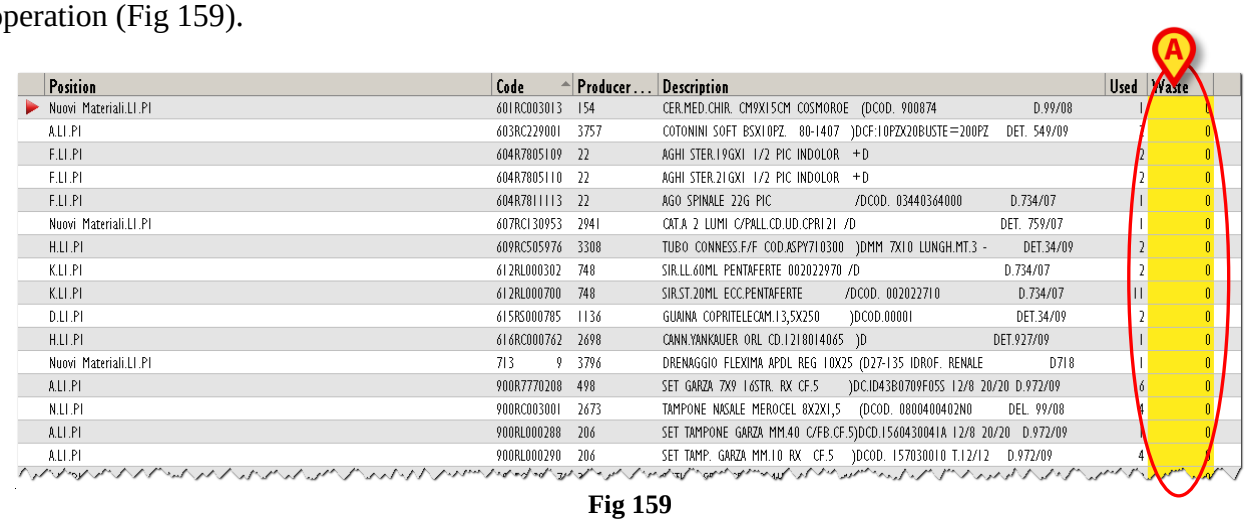
The filters available on this screen are:

- “Stockroom” - displays only the resources picked from a specific stockroom.
- “Cabinet group” - displays only the resources picked from a specific cabinet group.
- “Cabinet” - displays only the resources picked from a specific cabinet.

See paragraph 1.4.2 for instructions on the filters in the “Stock Management” system.

13.3.2. Data area

The “Resource waste” screen, if no filter is active, displays all the resources picked for the selected operation (Fig 159).



Position	Code	Producer...	Description	Used	Waste
Nuovi Materiali.LI.PI	601RC003013	154	CER.MED.CHIR. CM9X15CM COSMOROE (DCOD. 900874 D.99/08	1	0
A.LI.PI	603RC229001	3757	COTONINI SOFT BSX10PZ. 80-1407)DCF:10PZX20BUSTE=200PZ DET. 549/09	1	0
F.LI.PI	604R7805109	22	AGHI STER.19GXI 1/2 PIC INDOLOR +D	2	0
F.LI.PI	604R7805110	22	AGHI STER.21GXI 1/2 PIC INDOLOR +D	2	0
F.LI.PI	604R7811113	22	AGO SPINALE 22G PIC /DCOD. 03440364000 D.734/07	1	0
Nuovi Materiali.LI.PI	607RCI30953	2941	CAT.A 2 LUMI C/PALL.CD.UD.CPRI21 /D DET. 759/07	1	0
H.LI.PI	609RC505976	3308	TUBO CONNESS.F/F COD.ASPY710300)DMM 7X10 LUNGH.MT.3 - DET.34/09	2	0
K.LI.PI	612RL000302	748	SIR.LL.60ML PENTAFERTE 002022970 /D D.734/07	2	0
K.LI.PI	612RL000700	748	SIR.ST.20ML ECC.PENTAFERTE /DCOD. 002022710 D.734/07	11	0
D.LI.PI	615RS000785	1136	GUAINA COPRITELECAM.13,5X250)DCOD.00001 DET.34/09	2	0
H.LI.PI	616RC000762	2698	CANN.YANKAUER ORL CD.12180140 65)D DET.927/09	1	0
Nuovi Materiali.LI.PI	713 9	3796	DRENAGGIO FLEXIMA APDL REG 10X25 (D27-135 IDROF. RENALE D718	1	0
A.LI.PI	900R7770208	498	SET GARZA 7X9 16STR. RX CF.5)DC.ID43B0709F055 12/8 20/20 D.972/09	6	0
N.LI.PI	900RC003001	2673	TAMPONE NASALE MEROCEL 8X2X1,5 (DCOD. 0800400402N0 DEL. 99/08	4	0
A.LI.PI	900RL000288	206	SET TAMPONE GARZA MM.40 C/FB.CF.5)DCD.1560430041A 12/8 20/20 D.972/09	1	0
A.LI.PI	900RL000290	206	SET TAMP. GARZA MM.10 RX CF.5)DCOD. 157030010 T.12/12 D.972/09	4	0

Fig 159

Each row corresponds to a resource.

For each resource the following information can be displayed:

- the resource position (not editable);
- the resource code (not editable);
- the producer code (not editable);
- the resource description (not editable);
- the lot (if enabled by configuration - not editable);

- the expiration date (if enabled by configuration - not editable);
- the serial number (if enabled by configuration - not editable);
- the used resources quantity (not editable);
- the wasted resources quantity.

The icon at the beginning of a row indicates the selected item.
The only editable value on this screen is the number of wasted items; the corresponding cell is highlighted yellow if no value is here specified (Fig 159 **A**). Afyer value specification, and before clicking the **Update** button on the command bar, the cell is highlighted light blue (Fig 160).

Fig 160

The icon appearing alongside the cell makes it possible, when clicked, to bring the row back to its original values ("Undo" button).

See paragraph 13.4 ro the wasted resources recording procedure.

Not all the information is always specified. The kind of information available depends on the configuration chosen and the procedures in use.

13.3.3. The command bar of the "Waste" screen

The command bar on the "Waste" screen (Fig 161) contains the buttons making it possible to manage the screen contents.

Fig 161

The numeric buttons on the upper line of the command bar (Fig 162) can be used to insert the resource quantities.

Fig 162 - Numeric buttons

Click one of the numbers to write it in the "Waste" field (Fig 159 **A**).

The " **.** " button is a decimal divider. The button is active only if decimal specification is relevant.
The "**+/-**" button makes it possible to specify whether a value is negative or positive. The button is active only if negative values specification is relevant.

The “ **C** ” button brings back to zero the specified quantities.

The **Next** button selects the item following the one currently selected.

Use the arrow buttons ▼ and ▲ to scroll up and down the screen contents in case the items are too many to be displayed all together.

The other buttons are not active on this screen.

Use the **Close** button to close the current screen.

When editing the screen contents the **Update** and **Cancel** buttons appear on the command bar.

The **Update** button saves the changes made. After every editing of the screen contents it is necessary to click the **Update** button to save the changes.

The **Cancel** button annuls all the changes made.

13.4. How to record a “waste”

To record the fact that a resource was wasted, on the “Waste” screen (Fig 157).

- Click the row corresponding to the resource to be returned.

The row is selected, the ▶ icon appears at the beginning of the row.

- Use the numeric buttons on the command bar to specify the resource quantity.
- Click the **Update** button on the command bar.

Otherwise you can

- click the “Waste” cell on the row corresponding to the resource to be wasted.

The corresponding row is this way selected, the ▶ icon appears at the beginning of the row.

- Use either the numeric buttons or the workstation keyboard to set the quantities.
- Click the **Update** button on the command bar.

After clicking the **Update** button, the quantities specified in the “Used” cell are updated according to the new values. I.e.: if 5 items are picked of a certain resource and 2 items are wasted, the “Used” cell, after updating, specifies “3”.

If the quantity of items returned is equal or bigger than the quantity of picked items, the row corresponding to the resource disappears from the list displayed on screen.

13.4.1. Use of barcode reader in the “Waste” recording procedure

When the “Waste” screen is displayed the barcode reader can be used as search and selection tool.

Reading the barcode of the resource that must be wasted brings the corresponding row to the first place in the list of resources displayed on screen. The quantity is increased (one unit).

To perform this procedure

- scan the barcode of the resource that must be wasted.

The corresponding row is displayed on top of the resources list, the quantity displayed in the “Wasted” cell is increased of one unit.

- Click the **Update** button on the command bar.

13.5. Waste for unknown operation

When recording a waste for a resource picked for unknown operation:

- select the “Returns from operation” module by clicking the

icon on the lateral bar.

The “Operation list” screen opens (Fig 163):

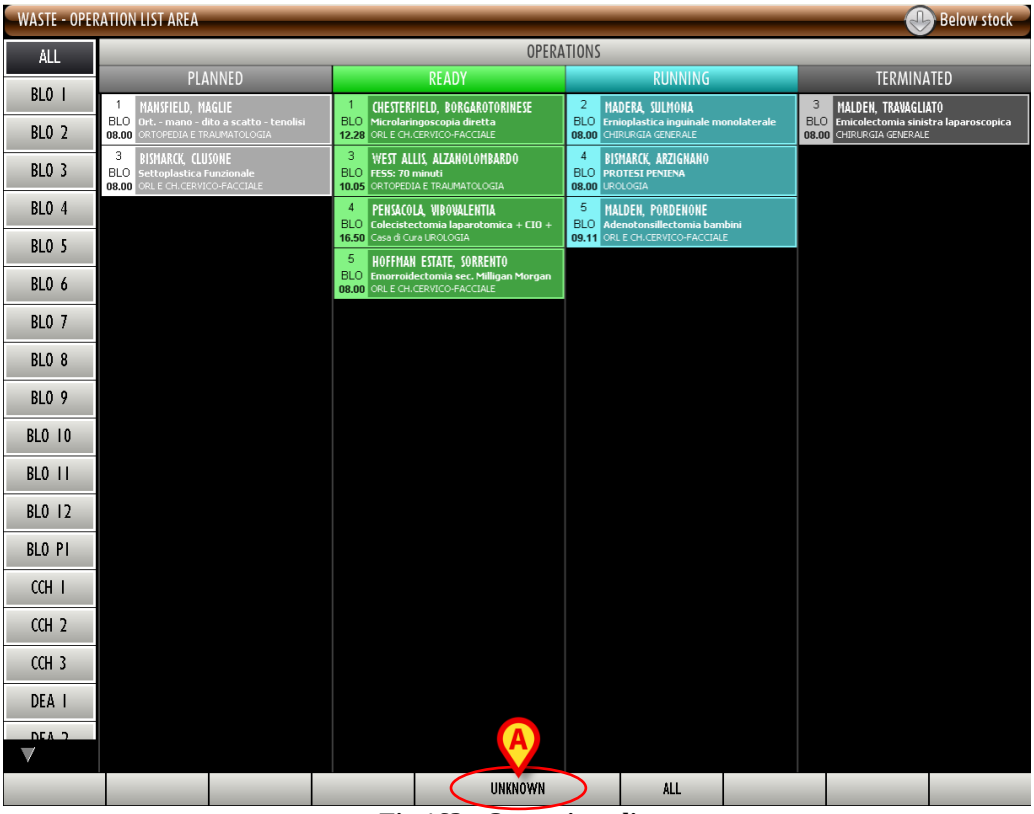


Fig 163 - Operation list

- Click the **Unknown** button on the command bar (Fig 163 **A**).

The “Resource waste” screen opens (Fig 165). The indication “Unknown operation” appears on top of the screen instead of the indication of the selected operation (Fig 164, Fig 165 **A**).

The screen displays the list of all the resources picked for unknown operation.

Fig 164

Fig 165 - Resource waste for unknown operation

To record the “Waste” use the procedures described in paragraphs 13.4 and 13.4.1.

13.6. Display all pickings

The **All** button on the command bar (Fig 166 **A**) displays the list of all the resources picked in the selected period. All the pickings are displayed: those associated to the operations, those associated to the cost centers, those associated to any other possible relevant entity.

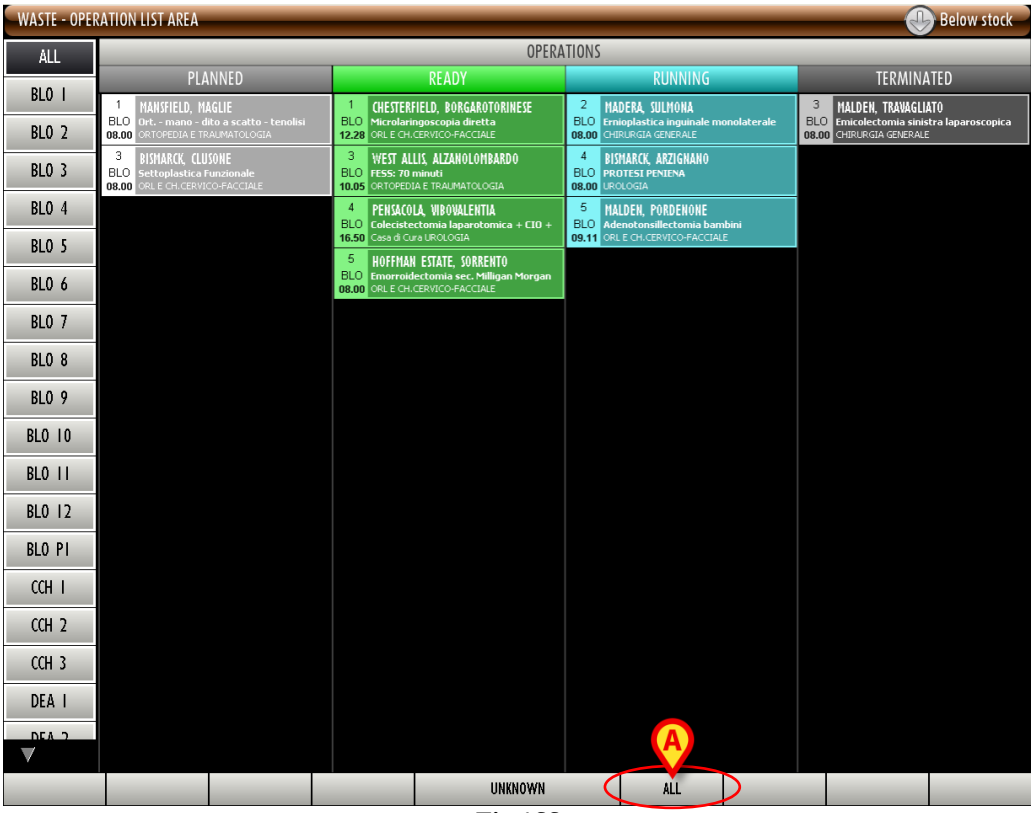


Fig 166

To display the list of all pickings

- click the **All** button on the command bar (Fig 166 **A**).

The following screen opens (Fig 167)

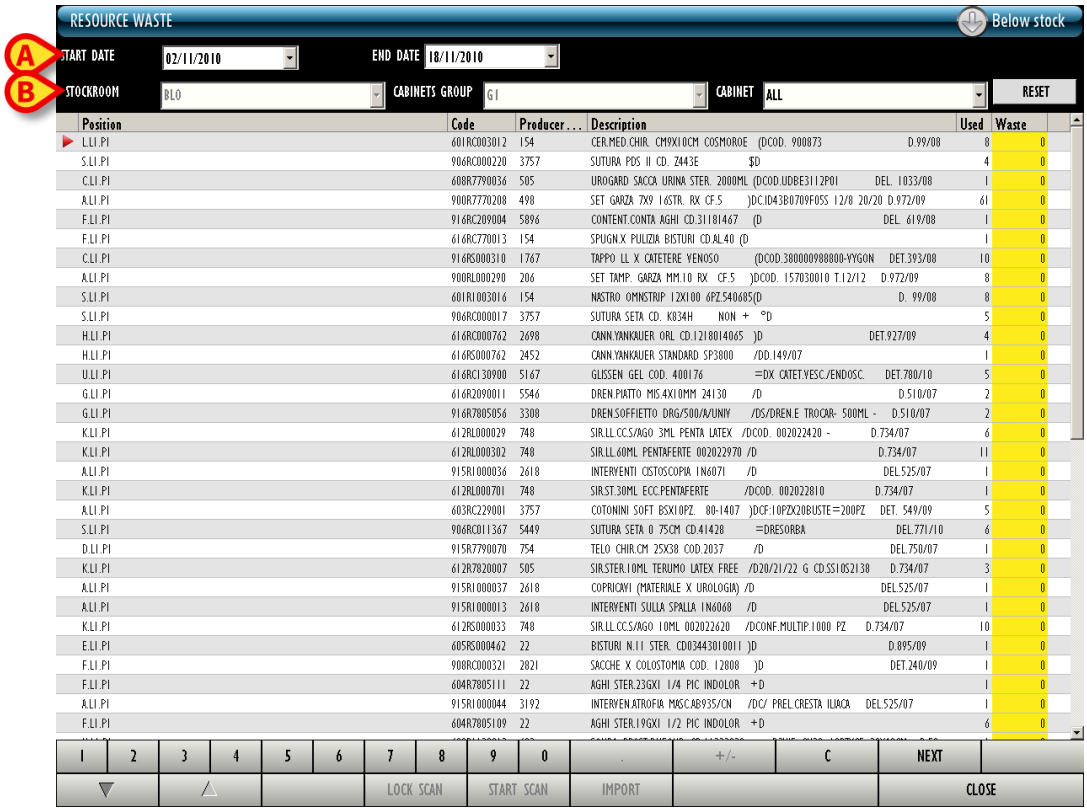


Fig 167 - Display all pickings

Use the “Start date” and “End date” filters (Fig 167 **A**) to select the relevant period of time. Only the resources picked in the period indicated are displayed. Use the other filters (Fig 167 **B**) to display the pickings relating to a specific stockroom, cabinets group or cabinet.

Use the procedures described in paragraphs 13.4 and 13.4.1.

14. Operation kit setup procedure

The DIGISTAT® "Stock Management" system makes it possible to fully manage all the procedures relating to the operation kits.

The operation kit setup is performed on the "Kit setup" module. To access this module

- click the corresponding icon on the lateral bar.

The following screen opens (Fig 168).

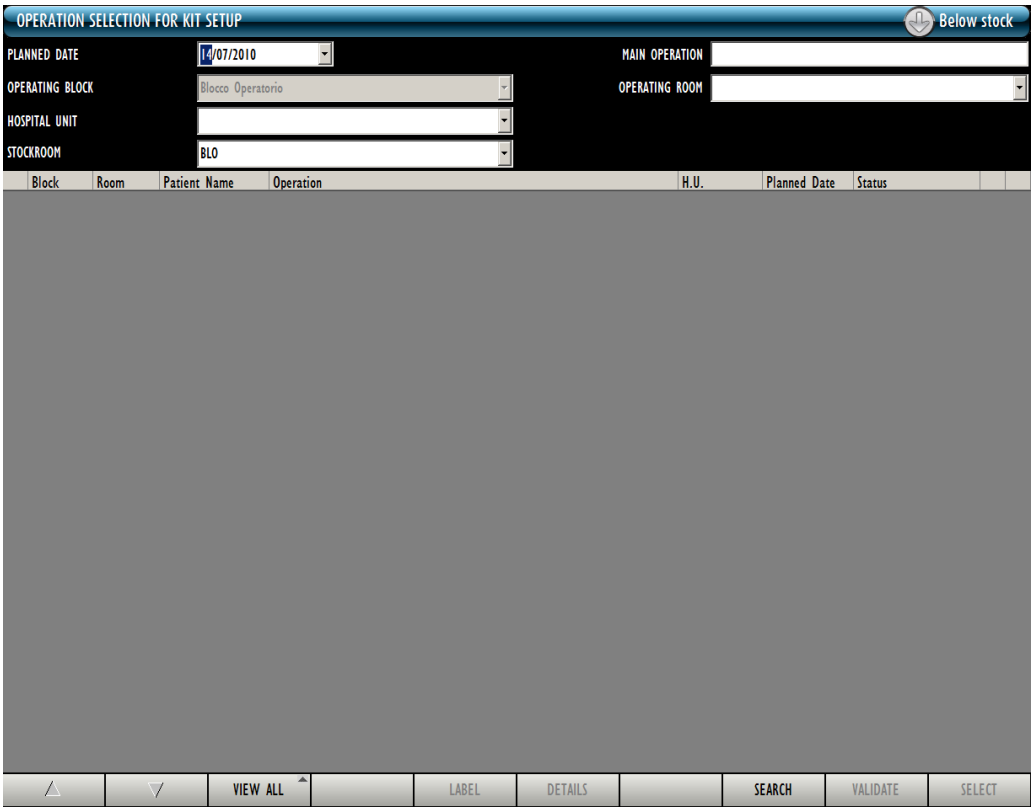


Fig 168

This screen makes it possible to find and select the operation for which the kit is prepared.

14.1. “Kit setup” - Screen structure

The “Kit setup” screen is structured according to the general description offered in paragraph 1.4, see this paragraph for the screen general features. The present paragraph describes the screen specific features.

14.1.1. Filters

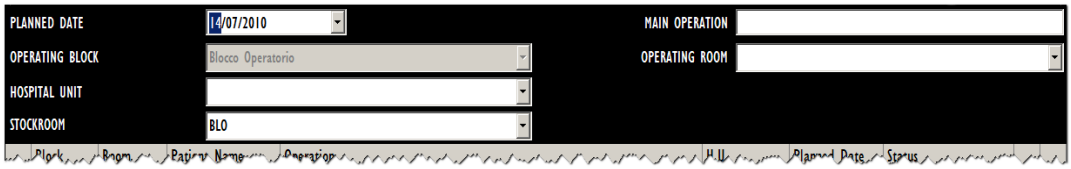


Fig 169 - Filters on the “Kit setup” screen

The filters available on the “Kit setup” screen (Fig 169) are:

- “Planned date” - Makes it possible to specify the planned date of the operation for which the kit is prepared. The operations listed on this screen (see paragraph 14.1.2) are all planned for the date here specified.
- “Operating block” - Displays the operations of a specific block.
- “Hospital unit” - Displays the operations of a specific hospital unit.
- “Stockroom” - This field makes it possible to select the stockroom in which the user is going to pick the kit’s resources. This is not properly a filter: its specification is necessary to indicate the relevant stockroom.
- “Main operation” - Displays only the specified main operation.
- “Operating room” - Displays the operations of a specific room.

See paragraph 1.4.2 for a general description of the filters in the “Stock Management” system.

14.1.2. Data area

The data area lists the operations corresponding to the features specified in the filters.

To display the list of operations,

- ➢ set the filters values (Fig 170 **A**).
- ➢ Click the **Search** button on the command bar (Fig 170 **B**).

The list of operations will be displayed, as a table, in the data area (Fig 170 **C**).

Fig 170 - List of operations

Each row on the table corresponds to an operation. For each operation the following information can be displayed:

- the operating block;
- the operating room;
- the patient name;
- the planned operation name;
- the hospital unit;
- the planned date and time;
- the operation kit status.

There are 7 possible statuses for an operation kit. These are:

- to be prepared - meaning that the kit has not been prepared yet;
- to be prepared validated - meaning that the kit has not been prepared yet but it was reviewed, possibly modified and validated by the person in charge for this purpose (i.e. the pharmacy staff);
- in preparation - someone is managing the kit (either for validation or for preparation);
- prepared - the kit has been prepared;
- prepared no more valid - the kit has been prepared but something changed after preparation (i.e. the operation data, the kit structure, the resouces quantities in the kit etc.);
- partial return - some of the kit resources have been returned;

- total return - all of the kit resources have been returned.

The icon, when displayed on the left of a row, indicates the selected operation.

The icon, when displayed at the end of a row indicates that the operation is not “locked”. The operation can be locked only on the DIGISTAT® Smart Scheduler system. See the Smart Scheduler documentation for instructions on the operation lock/unlock procedures (see Fig 171 A).

The icon does not affect the procedure described in this paragraph.

The standard kit preparation procedure requires that the operation is locked on DIGISTAT® Smart Scheduler before the kit is prepared.

See the Smart Scheduler documentation for instructions on the operation lock/unlock procedures.

The icon appears on the right on the rows corresponding to “prepared” kits. The icon can be clicked to display a pdf file containing the kit resources detailed list (see Fig 171 A).

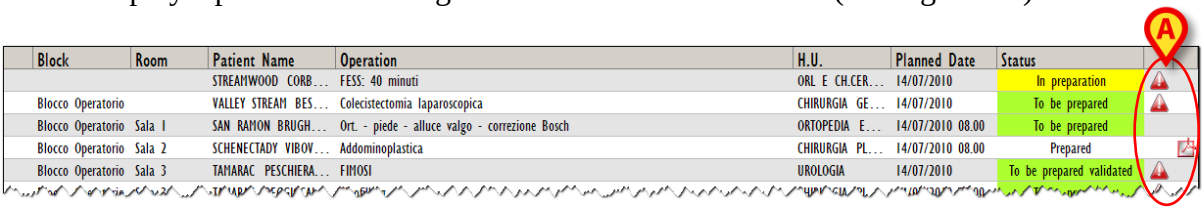


Fig 171

14.1.3. Command bar

This paragraph explains the functionalities of the buttons on the command bar (Fig 172).

Fig 172 - Command bar

Use the arrow buttons and to scroll up and down the screen contents in case the items are too many to be displayed all at the same time.

The **View All** button makes it possible to manage the way the operations are displayed. Click it to open a menu containing the available options (Fig 173).

Fig 173

The **View All** option displays all the operations.
The **Planned** option displays only the planned operations (and not the reserves).

The **Reserve** option displays only the reserves. See the DIGISTAT® Smart Scheduler and OranJ documentation for an explanation of the meaning of “Reserve”.

Use the **Label** button to print again the selected kit’s sticker label. This button is only active for prepared kits. See paragraph 14.8 for the complete procedure.

Use the **Details** button to display the selected kit details in a print report. A print preview is displayed.

Use the **Search** button to display on screen the list of operations having the features specified in the search filters (see paragraph 14.1.2).

Use the **Validate** button to access the kit validation functionalities. See paragraph 14.2 for the complete procedure.

Use the **Select** button to select the operation for which the kit is being prepared and proceed with the kit preparation. After clicking **Select** the kit preparation sheet is created and displayed in a print preview.

14.2. Kit validation procedure

The kit composition for a selected operation can be reviewed and, if necessary, edited by a person having the appropriate permissions. This procedure is named “kit validation procedure”.
To validate a kit

- click the row corresponding to the relevant operation.

The row is this way selected, the icon appears on the left of the row.

- Click the **Validate** button on the command bar.

The following screen opens

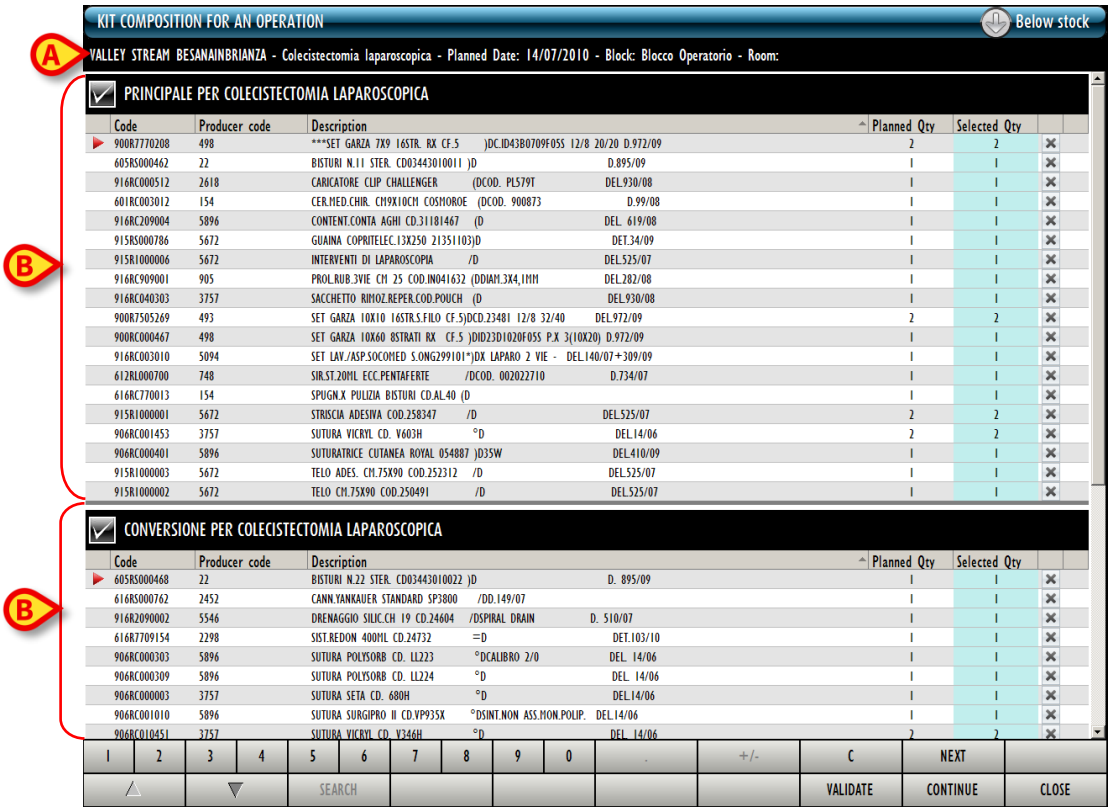


Fig 174 - Kit validation screen

The screen displays on top the main operation data (patient name, operation, planned date and location - Fig 174 **A**).

All the resources that are part of the kit are listed on screen, divided in groups corresponding to sub-kits (Fig 174 **A**).

The name of every group is indicated on the top-left corner of each group (Fig 175).

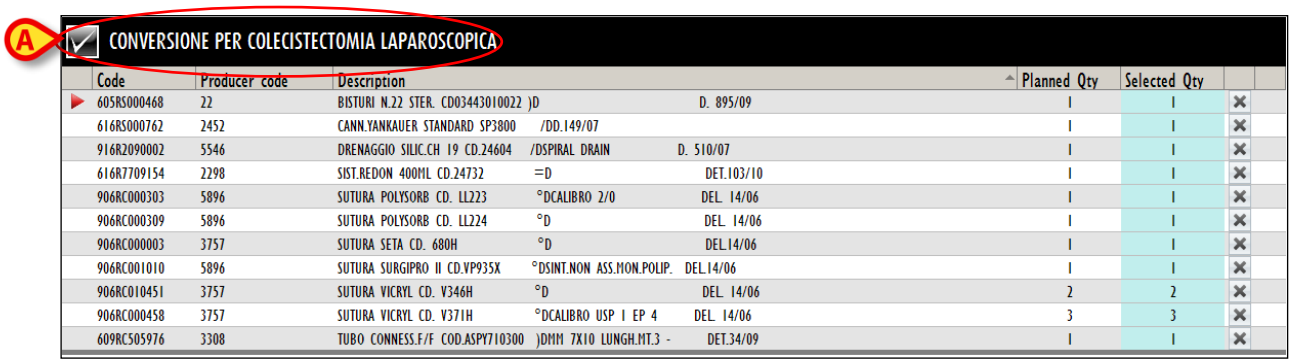


Fig 175 - Resources group

The checkbox placed before the name of the group makes it possible, if clicked, to deselect the whole group. I.e. the checkbox deselection indicates that no resource belonging to that group is required for the kit preparation. After deselection the list disappears (Fig 176).

Fig 176

Each row on the list corresponds to a resource. For each resource the following information can be specified:

- resource code;
- manufacturer code;
- resource description;
- required quantity according to kit configuration;
- new required quantity according to user specification.

The user can edit the kit composition. The editing procedures are described in paragraph 14.2.1.

After kit editing there are two possibilities.

- ➢ either click the **Validate** button on the command bar to complete the validation procedure and go back to the "Operation selection for kit setup" screen (Fig 177 - the kit status is now "To be prepared validated");

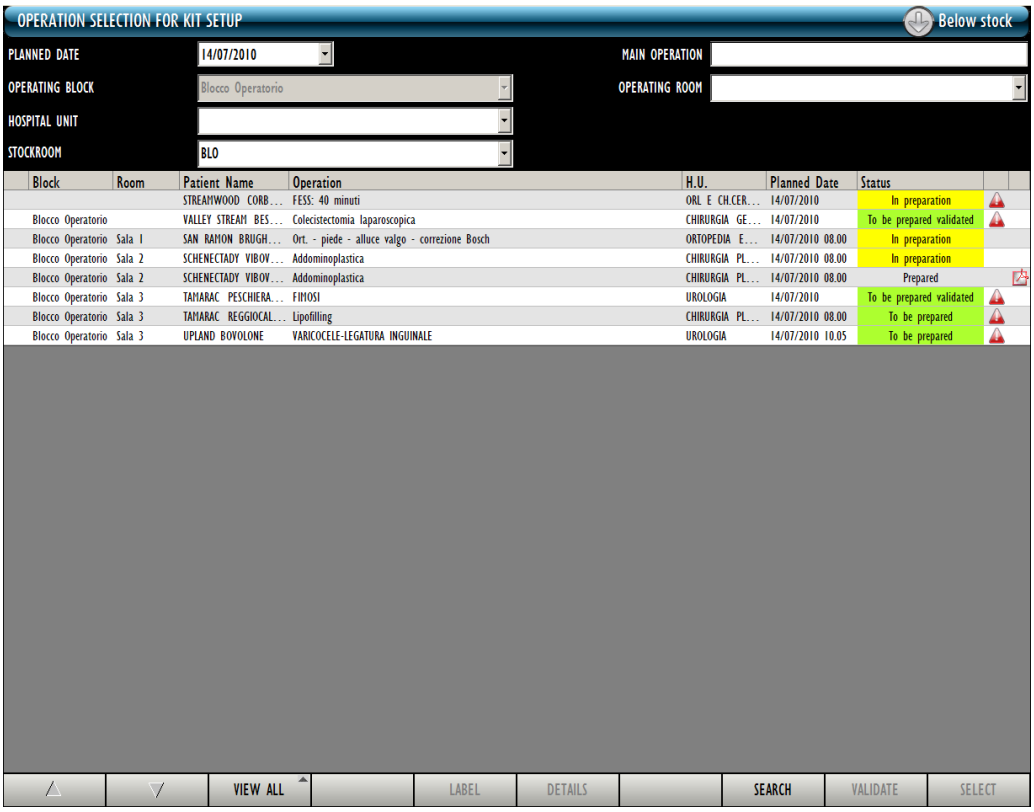


Fig 177 - Operation selection for kit setup

- ➢ or click the **Continue** button on the command bar to proceed with the kit preparation procedure.

After clicking the **Continue** button the kit creation sheet is created and displayed in a print preview. See paragraph 14.3

14.2.1. Kit editing

The user can edit the kit contents in the following ways:

1) changing the indicated quantity;
2) deleting a resource if not needed;
3) adding a resource to the kit.

14.2.1.1. Changing the resource quantity

To change the indicated quantity

- click the row corresponding to the relevant resource

The row is selected. The icon appears on the left.

- Use the numeric buttons on the command bar to specify the new quantity.

Or

- click the cell displaying the configured quantity.

The row is selected. The icon appears on the left. The quantity appears as highlighted.

- Use the workstation keyboard to specify the new quantity.

After resource editing the icon appears on the right (Fig 178). That is an “Undo” button. Click it to bring back the resource to the original quantity.

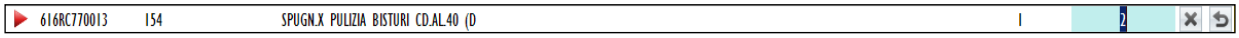


Fig 178 - Quantity has been changed

14.2.1.2. Deleting a resource

Use the button displayed on each row to delete the corresponding resource from the kit. After deletion the row appears as in Fig 179.

Fig 179 - Deleted resource

14.2.1.3. Adding a resource

To add a resource to the kit.

- Click the **Search** button on the command bar.

The system's search functionalities activate. The following screen opens.

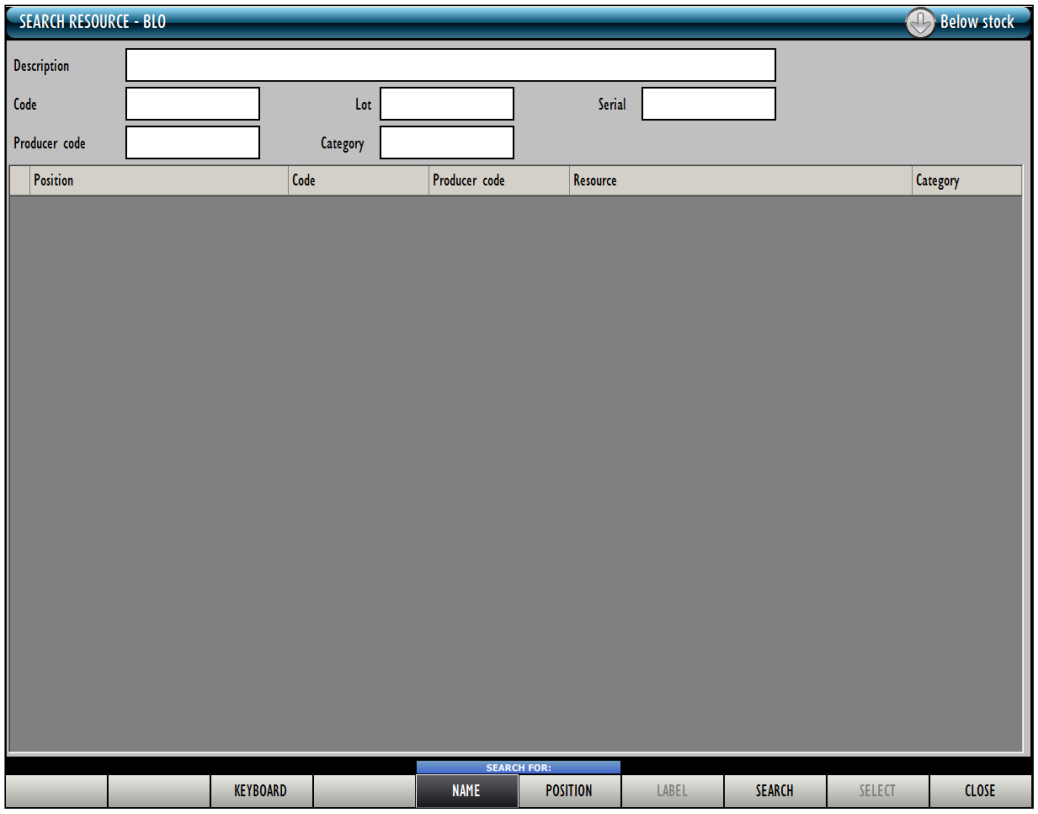


Fig 180 - Search screen

- Search for the wanted resource using the functionalities described in paragraph 22.

The resource will be added to the list (Fig 181). The planned quantity is 0. The new required quantity (editable) is 1.

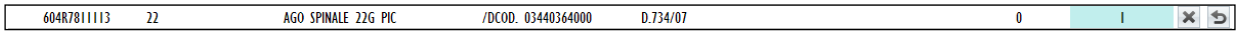


Fig 181 - Resource added

14.3. The "Kit creation" sheet

After selection of the operation for which the kit is being prepared

- click the **Select** button on the command bar to proceed with the kit preparation.

The kit preparation sheet is created and displayed in a print preview. See the example shown in Fig 182.

This document lists all the resources that are part of the kit that will be used in the selected operation.

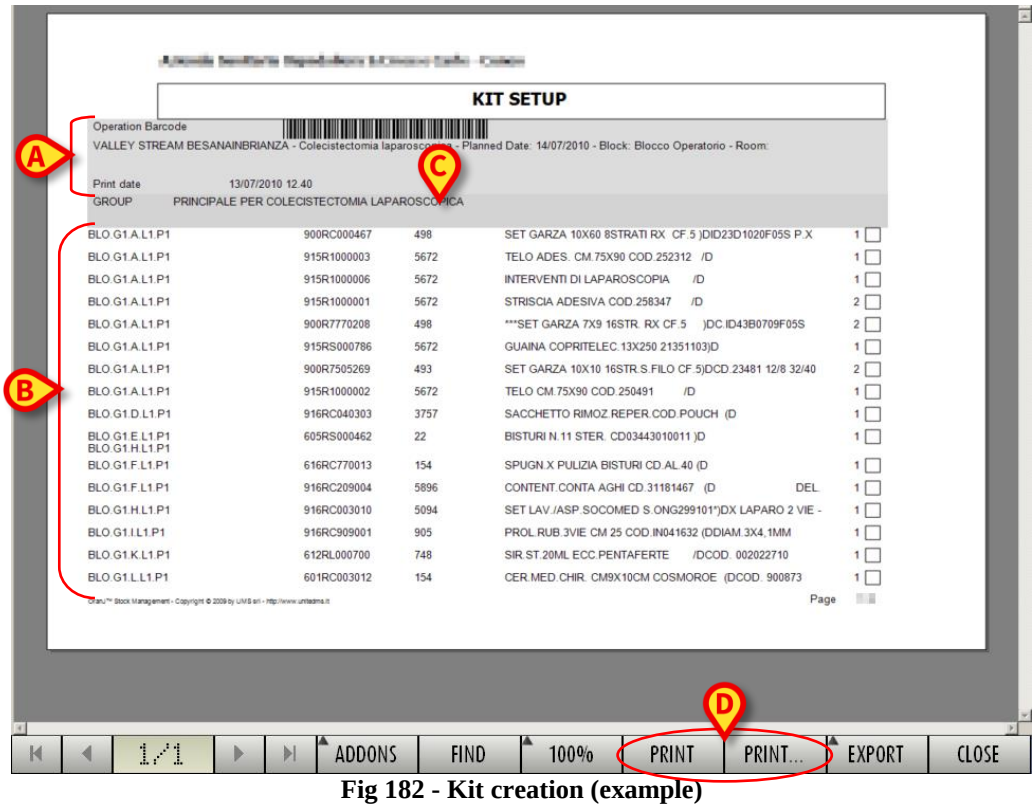


Fig 182 - Kit creation (example)

The resources are ordered by group. At the beginning a header (indicated in Fig 182 **A**), displays the operation barcode, the operation data (patient name, name of the operation, date, time, planned block and room) and the document date of creation.
The resources of the same operation are divided in groups. The group is indicated by the dark grey stripe shown in Fig 182 **C**.
The area indicated in Fig 182 **B** displays the list of resources. For each resource are indicated the position, the resource code, the manufacturer code, the description and the needed quantity (Fig 183).

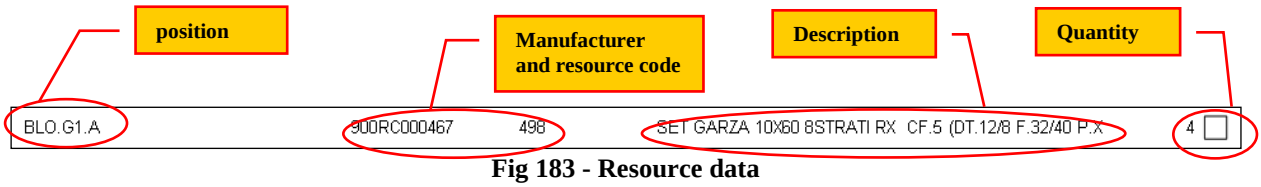


Fig 183 - Resource data

Use the **Print** button (Fig 182 **D**) on the command bar to print the document.

The print sheet is to be used as a checklist when the resources are actually picked from the cabinets and the kit is prepared. The checkboxes on the right can be used for this purpose.

Click the **Close** button to proceed with the kit preparation procedure. After closing the print preview the “Kit creation screen” is displayed.

14.4. Kit creation for an operation

The “Kit creation” screen (Fig 184) can be used to record the actual picking of the kit resources and to verify their quantities.

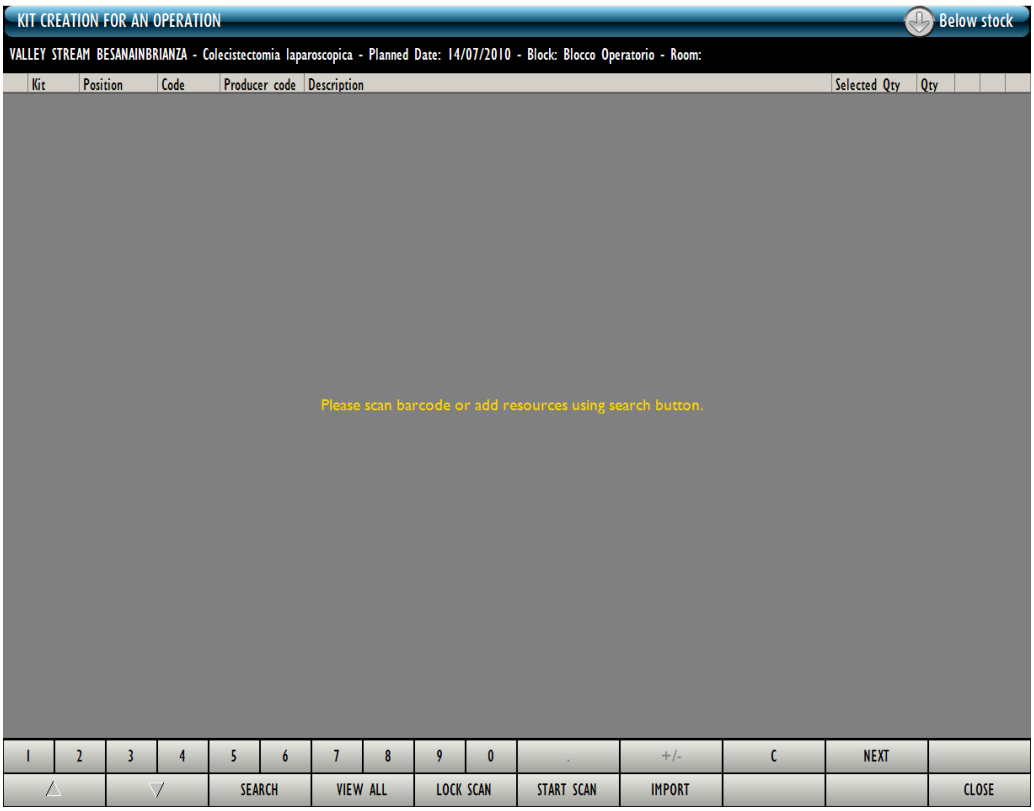


Fig 184 - Kit creation for an operation

The recording can be performed either manually (the procedure is described in paragraph 0) or using a barcode reader (the procedure is described in paragraph 14.6.2).

Barcode technology is recommended when selecting an item. Scanning the item’s barcode, instead of selecting it manually, helps the user to diminish selection errors.

14.5. Kit creation screen description

The screen shown in Fig 184 is formed of three main areas:

- the header;
- the data area;
- the command bar.

These areas are described in the following paragraphs.

14.5.1. Header

The header displays the data of the operation for which the kit is being prepared.

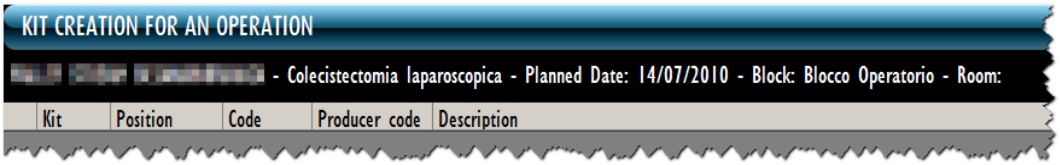


Fig 185 - Header

These data are:

- the patient name;
- the operation;
- the operation planned date and time;
- the planned block and room.

14.5.2. Data area

The data area displays the list of resources that are progressively recorded and entered into the kit. The resources are listed in a table (Fig 186 **A**).

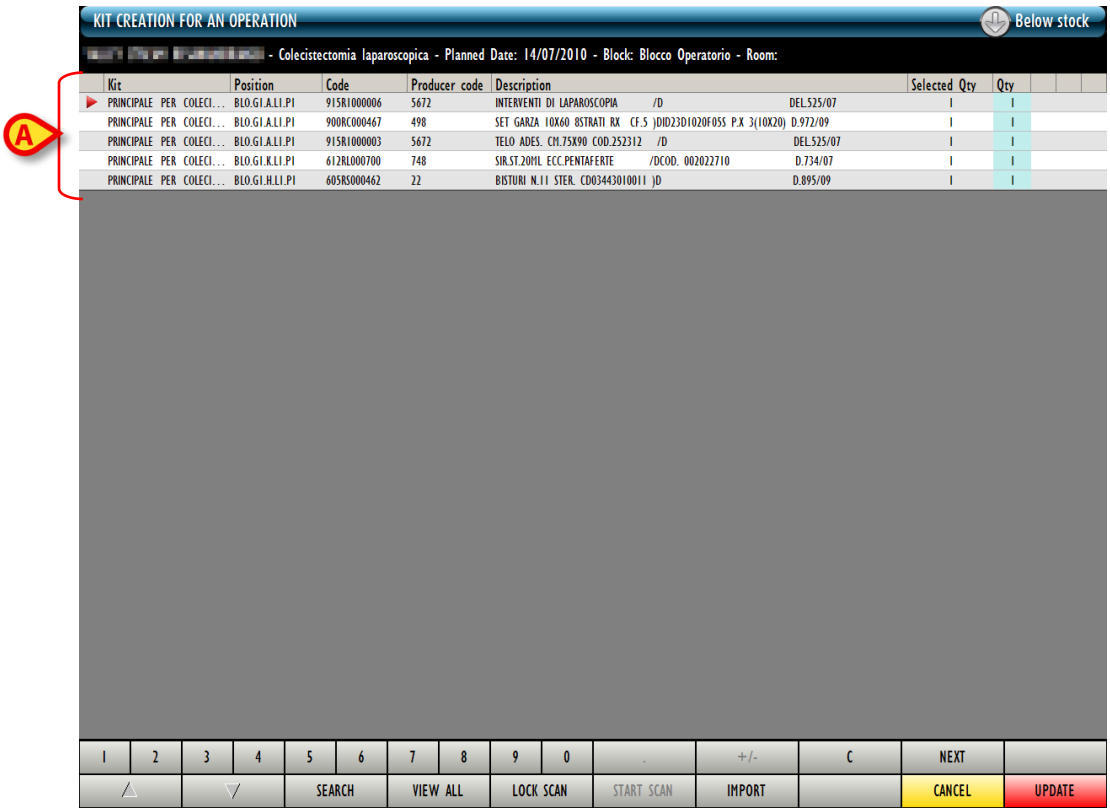


Fig 186 - Recorded resources

The list "grows" as the resources are entered (either manually or by barcode scan). Each row corresponds to a resource (Fig 187).

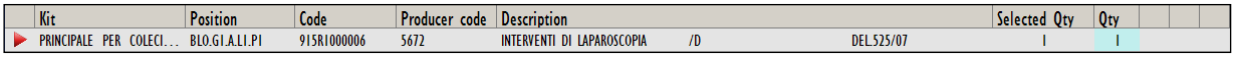


Fig 187 - Resource

The information that can be displayed for each resource is:

- Name of the kit
- Position from which the resource is picked
- Resource code
- Manufacturer code
- Resource description
- Needed quantity
- Recorded quantity

The ▶ icon on the left indicates the selected row.
The mandatory fields are highlighted light-blue.

The possible yellow fields must be filled by the user (Fig 188).

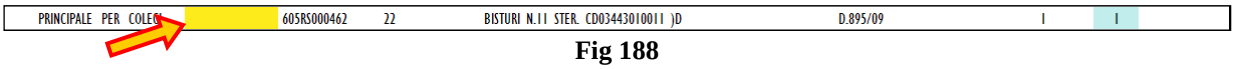


Fig 188

To insert information in a field click the field and type the information. When multiple choice is possible, a drop down offers the admissible multiple values (Fig 189).

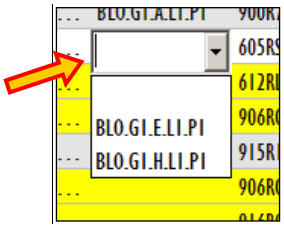


Fig 189 - Information selection

Numeric values can be inserted using either the numeric keyboard on the command bar or the workstation keyboard.

14.5.3. The command bar

The command bar (Fig 190) is formed of several buttons. This paragraph lists briefly the functions of the different buttons, indicating successive paragraphs when more detailed instructions on a specific functionality are necessary.

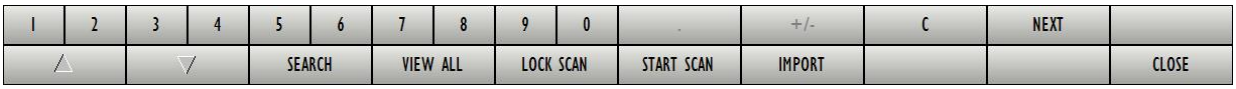


Fig 190 - Command bar

The buttons in the upper line make it possible to manage the numeric data specification.

Fig 191 - Numeric buttons

Use the numeric buttons (Fig 191) to indicate the quantities. Click one of the numbers to write the number in the "Quantity" field.

The " **.** " button is a decimal divider. The button is active only if decimal specification is relevant.
The "**+/-**" button makes it possible to specify whether a value is negative or positive. The button is active only if negative values specification is relevant.

The " **C** " button brings back to zero the specified quantities.

The **Next** button selects the item following the one currently selected.

The lower line of the command bar contains the following buttons.

Use the arrow buttons and to scroll up and down the screen contents in case the items are too many to be displayed all at the same time.

Use the **Search** button to access the system's search functionalities (described in paragraph 22). Click this button to open the screen shown in Fig 193.

Use the **View All** button to display the complete list of resources needed for the selected kit. See paragraph 14.6.6 for a description of this functionality.

Use the **Lock Scan** button to lock the workstation while reading numerous barcodes that will be recorded all together afterwards. See paragraph 14.6.3 for a description of the related procedures.

Use the **Start Scan** button to begin the reading of numerous barcodes that will be recorded all together afterwards. See paragraph 0 for the instructions relating to this procedure.

Use the **Import** button to import the selected items using a wireless barcode reader having internal memory. See paragraph 14.6.5 for the instructions relating to this option.

Use the **Close** button to close the current screen.

When editing the screen contents the **Update** and **Cancel** buttons are displayed on the command bar.

Use the **Update** button to save the changes made. After every editing it is necessary to click the **Update** button to save the changes.

The **Cancel** button annuls all the changes made.

14.6. How to record the resource picking for kit composition

The resource picking for the composition of a kit can be recorded either manually or using a barcode reader.

The different procedures are described in the following paragraphs.

!

Barcode technology is recommended when selecting an item. Scanning the item's barcode, instead of selecting it manually, helps the user to diminish selection errors.

14.6.1. Manual procedure

To manually record the resource picking

- click the **Search** button on the command bar (Fig 192).

Fig 192

the search screen opens (Fig 193). The screen is described in paragraph 22.

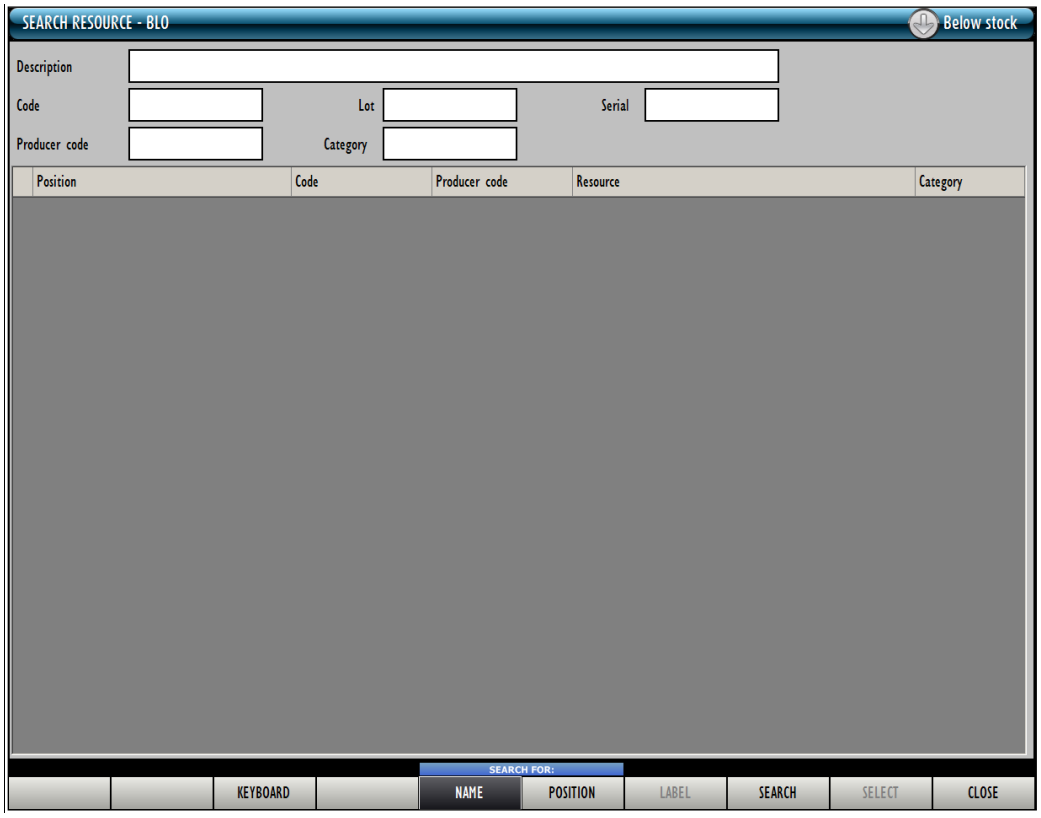


Fig 193 - Search resource

- Search the wanted resource using the functionalities described in paragraph 22.
- Double click the row corresponding to the resource that will be inserted in the kit.

A row will be added to the table on the “Kit creation screen”, corresponding to the selected resource (Fig 194 **A**).

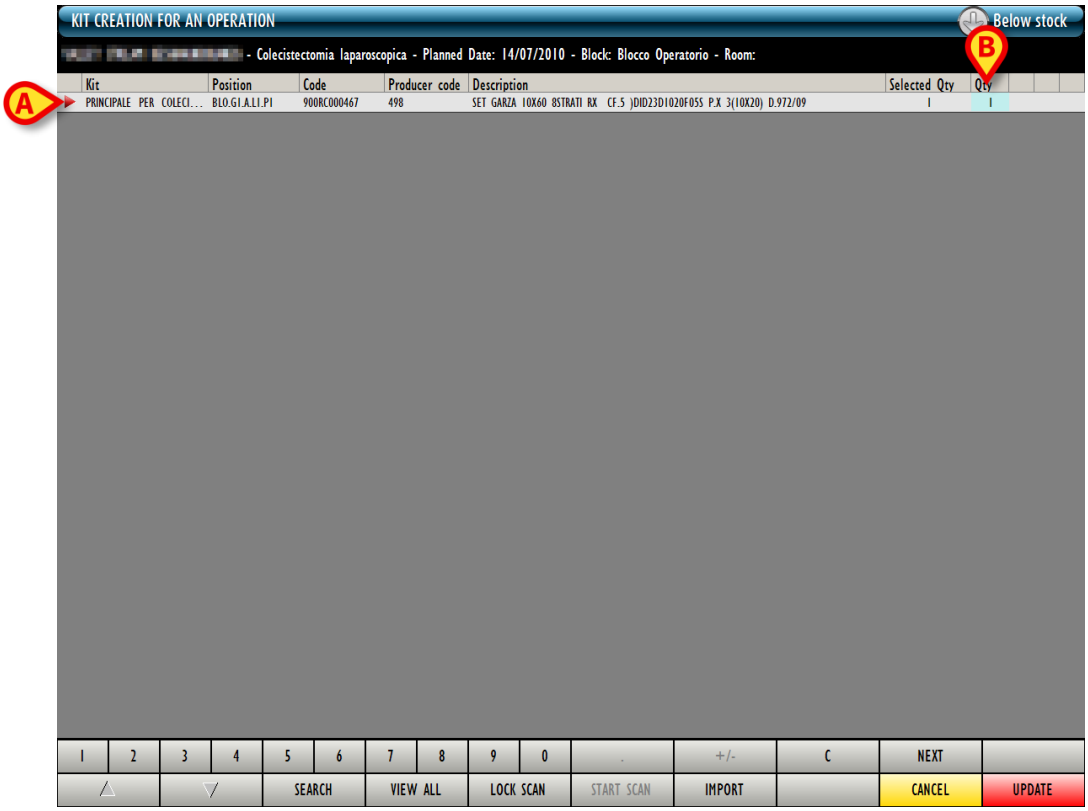


Fig 194

- Specify the resource quantity in the “Quantity” field (Fig 194 **B**).
- Click the **Update** button on the command bar.

This procedure records the fact that the specified quantity of the selected resource has been inserted in the kit.

14.6.2. Barcode procedure

The resources can also be recorded using a barcode reader and scanning the resource barcode. This paragraph describes the procedures relating to this functionality.

Access the “Kit creation” screen (Fig 194),

- scan the resource barcode.

A row corresponding to the resource will be displayed on screen.

When the barcodes of resources of the same kind are scanned the resource quantity increases.

14.6.3. Lock scan

The **Lock Scan** button on the command bar (Fig 195) makes it possible to lock the workstation while the user reads numerous barcodes that will be recorded later, all together.

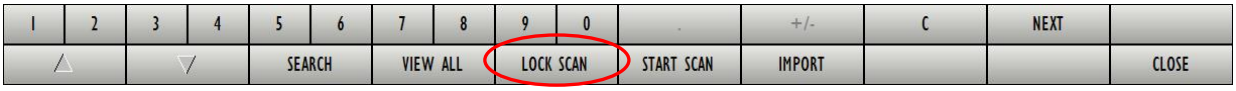


Fig 195 - Command bar

This functionality is used when it is necessary to leave the workstation alone to personally scan the barcodes of several items that are in a different place. This procedure is performed using a wireless barcode reader.

This is the procedure:

- click the **Lock Scan** button.

The button appears as selected. The button remains this way while the workstation is locked.

The following window is displayed (Fig 196).

Fig 196

- Read the barcodes. The workstation is locked to other users.

After barcodes reading,

- insert your password in the field indicated in Fig 196 **A**.
- Click the **Continue** button (Fig 196 **B**).

The workstation is this way unlocked. The rows corresponding to all the barcodes read appear on screen.

The **Keyboard** button on the window opens a virtual keyboard that can be used to insert the password (Fig 197).

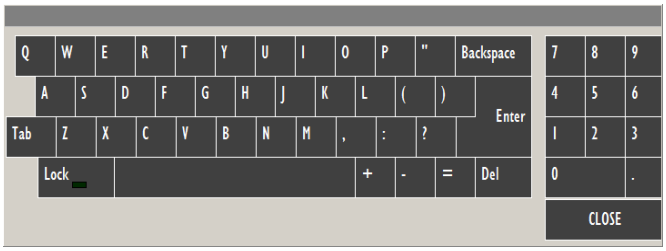


Fig 197 - Virtual keyboard

14.6.3.1. How to force the workstation unlocking

The workstation can be unlocked by another user if his/her permissions level enables him/her to do it.

To force the workstation unlocking

- click the option “Advanced options” on the window requesting password (Fig 198).

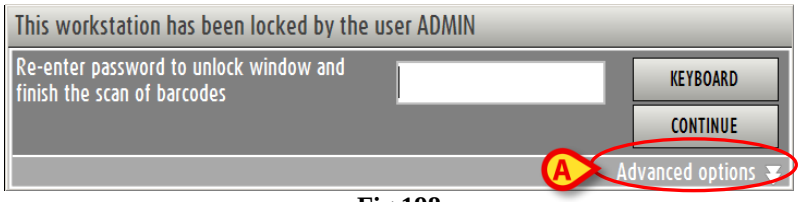


Fig 198

The window changes in the following way (Fig 199).

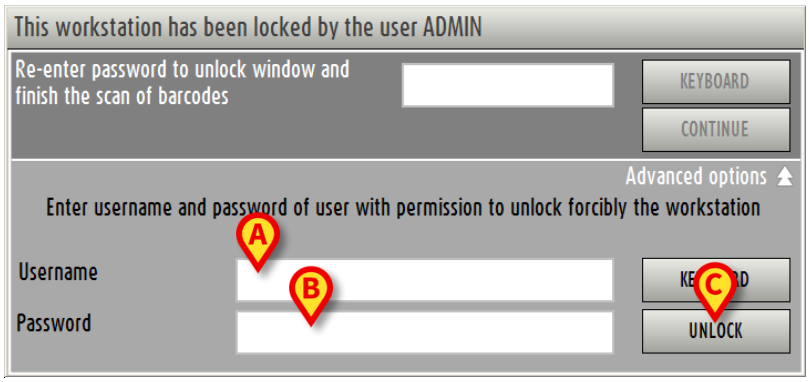


Fig 199 - Advanced options

- Insert the username of the new user in the “Username” field (Fig 199 **A**).
- Insert the password of the new user in the “Password” field (Fig 199 **B**).
- Click the **Unlock** button (Fig 199 **C**).

If the new user has the appropriate permissions the workstation is unlocked.

!

*The barcodes read by the original user will **not** be recorded.*

14.6.4. Start scan

The **Start Scan** button on the command bar (Fig 200) makes it possible to read numerous barcodes that will be recorded later, all at the same time.

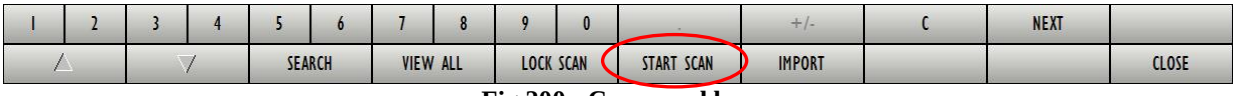


Fig 200 - Command bar

This is the procedure:

- click the **Start Scan** button.

The button changes to **Stop Scan**.

A pop-up window informs the user that barcode reading can start (Fig 201).

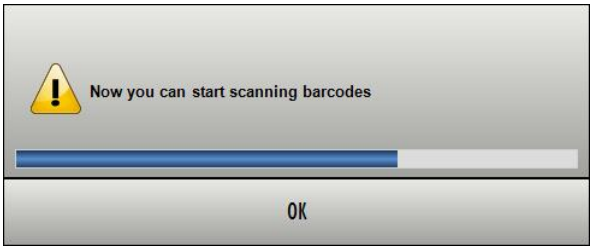


Fig 201

The user is logged out. This happens because the user now probably moves away from the workstation to read the barcodes.

- Read the barcodes.

After barcode reading, to import the data of the scanned resources into the system,

- log in again.
- Click the icon on the lateral bar to access the “Kit creation” screen again.
- Click the **Stop Scan** button.

The rows corresponding to the scanned resources barcodes appear on screen.

While scanning, the blue bar on top of the screen displays the following advice “Press STOP SCAN to import the scanned products” (Fig 202).

Fig 202

14.6.5. Import

The **Import** button on the command bar (Fig 203) makes it possible to import into the system the data read with a wireless barcode reader having internal memory.

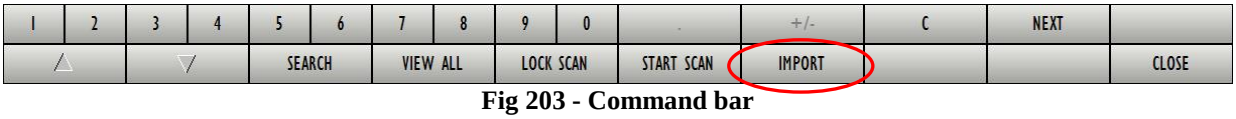


Fig 203 - Command bar

This is the procedure:

- read the barcodes using the appropriate devices, configured to connect to the system.
- Click the **Import** button.

the following windows appear, informing the user on the import procedure state.

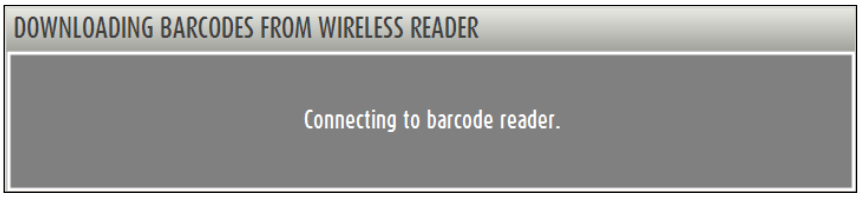


Fig 204

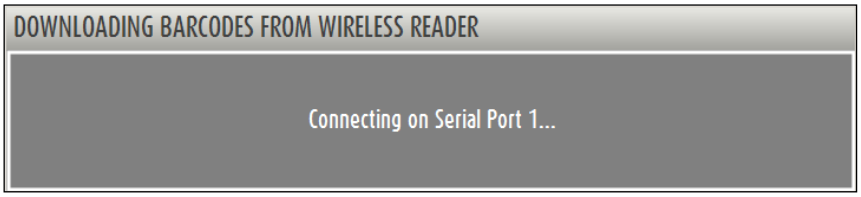


Fig 205

If the procedure succeeds the data are imported. The rows corresponding to the resources scanned appear on screen.

14.6.6. The “View all” option

The **View All** button on the command bar displays the complete list of resources needed for the selected operation (Fig 206).

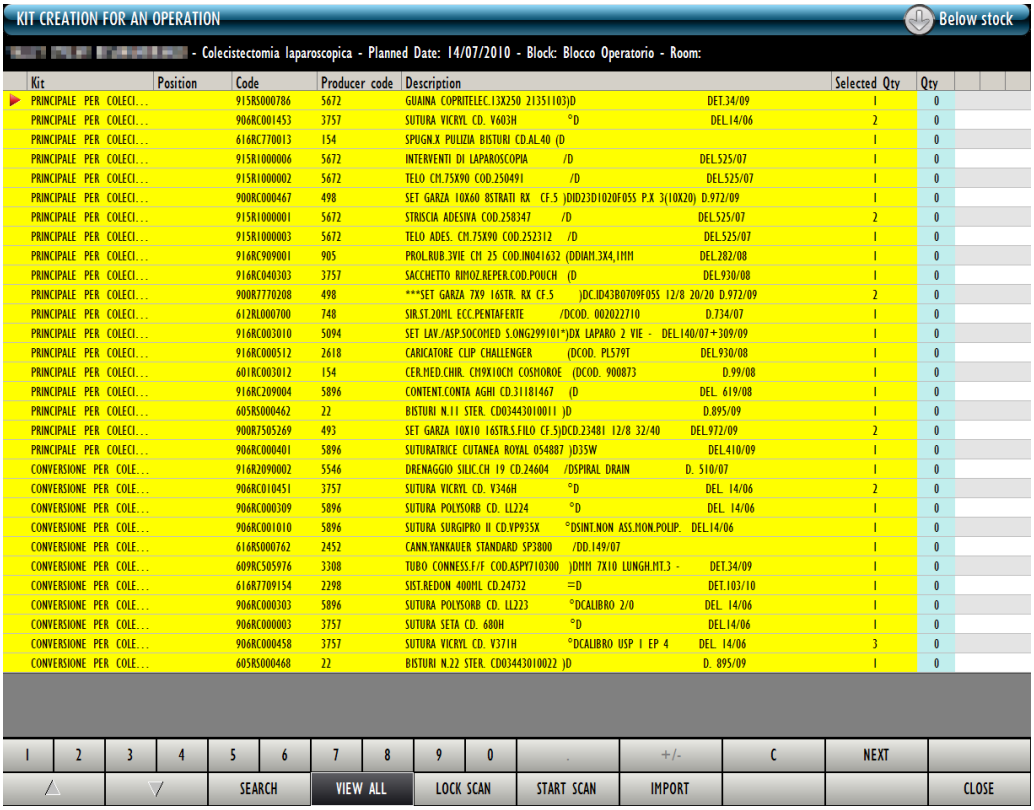


Fig 206 - Display all

When the “View all” mode is activated the button appears as selected.
The resources are highlighted yellow until they are correctly recorded and indicated as “picked” and inserted into the kit in the appropriate quantities. After recording the row becomes white.
The procedures relating to the resources recording are those described in the preceding paragraphs.

14.6.7. Quick resource quantity recording

To quickly record the quantity of resource needed

- click the cell indicating the “Needed quantity” of the relevant resource.

See Fig 207 **A** for an example.

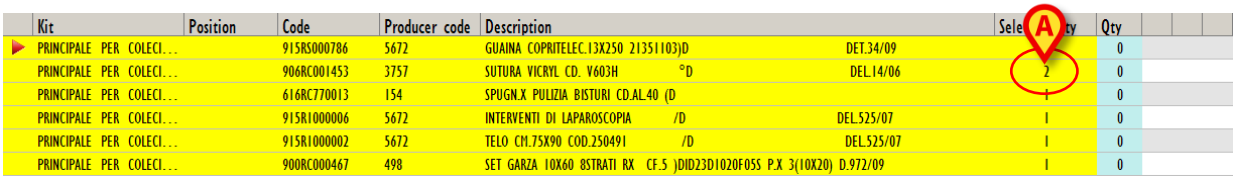


Fig 207

The quantity of resource indicated as necessary will be automatically inserted in the “Used quantity” cell (Fig 208 **A**).

Kit	Position	Code	Producer code	Description		Selected Qty	
PRINCIPALE PER COLECI...		915RS000786	5672	GUAINA COPRITELEC.13X250 21351103)D	DET.34/09	1	
PRINCIPALE PER COLECI...	BL0.G1.S.L1.P1	906RC001453	3757	SUTURA VICRYL CD. V603H °D	DEL.14/06	2	2
PRINCIPALE PER COLECI...		616RC770013	154	SPUGN.X PULIZIA BISTURI CD.AL.40 (D		1	0
PRINCIPALE PER COLECI...		915R1000006	5672	INTERVENTI DI LAPAROSCOPIA /D	DEL.525/07	1	0

Fig 208

14.7. Possible exceptions

There are cases in which the recorded quantity of a resource does not correspond to the quantity requested by the kit. These cases are signalled with a specific procedure.

There are three possible cases:

1) a resource is recorded that was not in the list of resources needed for the kit;
2) the resource quantity is higher than that needed;
3) the resource quantity is lower than that needed.

The exceptions, in all cases, are signalled by the pink colour highlighting the relevant row (Fig 209 **A**).

Kit	Position	Code	Producer code	Description		Selected Qty	Qty
PRINCIPALE PER COLECI...		915RS000786	5672	GUAINA COPRITELEC.13X250 21351103)D	DET.34/09	1	0
PRINCIPALE PER COLECI...	BL0.G1.S.L1.P1	906RC001453	3757	SUTURA VICRYL CD. V603H °D	DEL.14/06	2	2
PRINCIPALE PER COLECI...		616RC770013	154	SPUGN.X PULIZIA BISTURI CD.AL.40 (D		1	0
PRINCIPALE PER COLECI...		915R1000006	5672	INTERVENTI DI LAPAROSCOPIA /D	DEL.525/07	1	0
PRINCIPALE PER COLECI...		915R1000002	5672	TELO CM.75X90 COD.250491 /D	DEL.525/07	1	0
PRINCIPALE PER COLECI...		900RC000467	498	SET GARZA 10X60 8STRATI RX CF.5)DID23D1020F05S P.X 3(10X20)	D.972/09	1	0
PRINCIPALE PER COLECI...	BL0.G1.A.L1.P1	915R1000001	5672	STRISCIA ADESIVA COD.258347 /D	DEL.525/07	2	1
PRINCIPALE PER COLECI...		915R1000003	5672	TELO ADES. CM.75X90 COD.252312 /D	DEL.525/07	1	0
PRINCIPALE PER COLECI...		916RC909001	905	PROL.RUB.3VIE CM 25 COD.IN041632 (DDIAM.3X4,1MM	DEL.282/08	1	0
PRINCIPALE PER COLECI...	BL0.G1.D.L1.P1	916RC040303	3757	SACCHETTO RIMOZ.REPER.COD.POUCH (D	DEL.930/08	1	2
PRINCIPALE PER COLECI...		900R7770208	498	***SET GARZA 7X9 16STR. RX CF.5)DC.ID43B0709F05S 12/8 20/20	D.972/09	2	0
PRINCIPALE PER COLECI...		612RL000700	748	SIR.ST.20ML ECC.PENTAFERTE /DCOD. 002022710	D.734/07	1	0
PRINCIPALE PER COLECI...		916RC003010	5094	SET LAV./ASP.SOCOMED S.ONG299101*)DX LAPARO 2 VIE -	DEL.140/07+309/09	1	0

Fig 209 - Exceptions

The icon on the right of the row (Fig 209 **B**) cancels the resource from the list. After clicking the icon the row appears as in Fig 210.

PRINCIPALE PER COLECI...	BL0.G1.A.L1.P1	900R7505269	493	SET GARZA 10X10 16STR.S.FILO CF.5)DCD.23481 12/8 32/40	DEL.972/09	2	0

Fig 210 - Cancelled resource

The icon on the right of the row (Fig 209 **B**) accepts an exception as a correct value. After clicking the icon the row appears as in Fig 211. The cell indicating the recorded quantity remains yellow to indicate that it still is an exception.

PRINCIPALE PER COLECI...	BL0.G1.A.L1.P1	900R7505269	493	SET GARZA 10X10 16STR.S.FILO CF.5)DCD.23481 12/8 32/40	DEL.972/09	2	1

Fig 211 - Accepted exception

In both cases you can use the button as “Undo” button.

14.8. Completing the kit resources recording procedure

When the user decides that the kit is complete, he/she must click the **Update** button on the command bar.

The procedures requires now to print the adhesive labels that will be stuck to the cases that will be brought in the operating room.

For this purpose a specific window appears on screen (Fig 212) after the **Update** button is clicked.

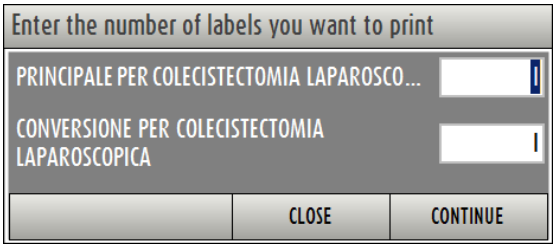


Fig 212 - print label

The window lists all the groups forming the prepared kit. The field placed near each group makes it possible to specify the number of labels that will be printed (the resources belonging to the same group can be placed in different cases).

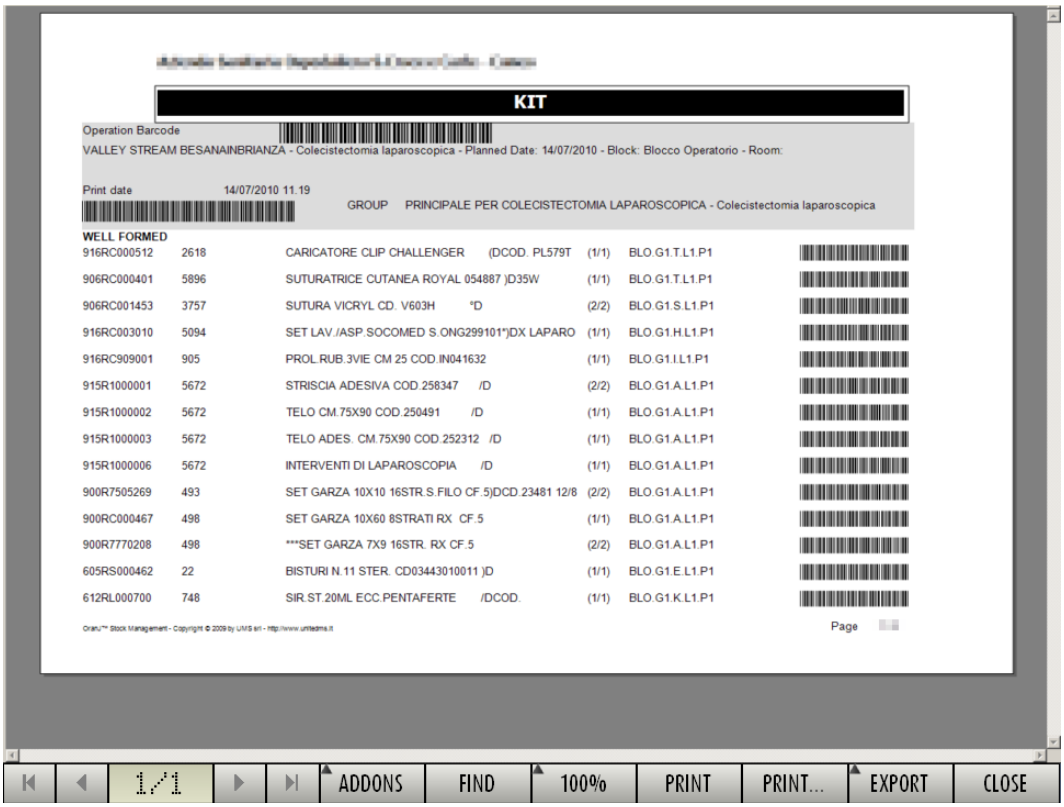
The labels are then stuck to the cases containing the resources.

After the number of labels has been specified

- click the **Continue** button.

The labels are printed. A print report is also created as summary, listing the resources in the different groups. A print preview is displayed (Fig 213).

This document usually goes with the kit, into the operating room.



KIT

Operation Barcode

VALLEY STREAM BESANAINBRIANZA - Colecistectomia laparoscopica - Planned Date: 14/07/2010 - Block: Blocco Operatorio - Room:

Print date 14/07/2010 11.19

GROUP PRINCIPALE PER COLECISTECTOMIA LAPAROSCOPICA - Colecistectomia laparoscopica

WELL FORMED

916RC000512	2618	CARICATORE CLIP CHALLENGER (DCOD. PL579T	(1/1)	BLO.G1.T.L1.P1
906RC000401	5896	SUTURATRICE CUTANEA ROYAL 054887)D35W	(1/1)	BLO.G1.T.L1.P1
906RC001453	3757	SUTURA VICRYL CD. V603H °D	(2/2)	BLO.G1.S.L1.P1
916RC003010	5094	SET LAV./ASP.SOCOMED S.ONG299101*)DX LAPARO	(1/1)	BLO.G1.H.L1.P1
916RC909001	905	PROL.RUB.3VIE CM 25 COD.IN041632	(1/1)	BLO.G1.I.L1.P1
915R1000001	5672	STRISCIA ADESIVA COD.258347 /D	(2/2)	BLO.G1.A.L1.P1
915R1000002	5672	TELO CM.75X90 COD.250491 /D	(1/1)	BLO.G1.A.L1.P1
915R1000003	5672	TELO ADES. CM.75X90 COD.252312 /D	(1/1)	BLO.G1.A.L1.P1
915R1000006	5672	INTERVENTI DI LAPAROSCOPIA /D	(1/1)	BLO.G1.A.L1.P1
900R7505269	493	SET GARZA 10X10 16STR.S.FILO CF.5)DCD.23481 12/8	(2/2)	BLO.G1.A.L1.P1
900RC000467	498	SET GARZA 10X60 8STRATI RX CF.5	(1/1)	BLO.G1.A.L1.P1
900R7770208	498	***SET GARZA 7X9 16STR. RX CF.5	(2/2)	BLO.G1.A.L1.P1
605RS000462	22	BISTURI N.11 STER. CD03443010011)D	(1/1)	BLO.G1.E.L1.P1
612RL000700	748	SIR.ST.20ML ECC.PENTAFERTE /DCOD.	(1/1)	BLO.G1.K.L1.P1

Page

1/1 ADDONS FIND 100% PRINT PRINT... EXPORT CLOSE

Fig 213 - Kit content (print report)

15. Return from kit

The “Return from kit” module is used to record the resources that were picked from the cabinets to be inserted in the kits but were not used during the operation (“Returns” from now on).

To select the module

- click the corresponding icon .

The following screen opens (Fig 214).

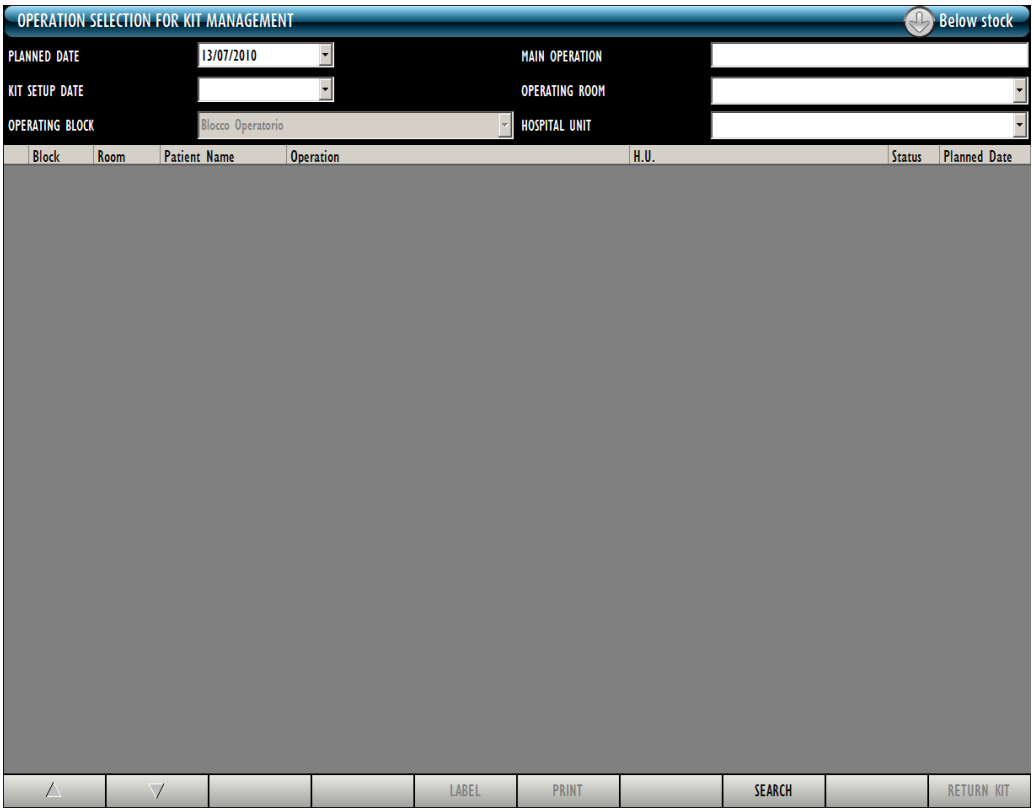


Fig 214 - Operation selection for “return from kit”

This screen makes it possible to find and select the operation for which the resources are returned.

15.1. Screen structure

The “Return from kit” screen is structured according to the general description offered in paragraph 1.4, see this paragraph for the screen general features. The present paragraph describes the screen specific features.

The procdure requires, first of all, the selection of the operation to which the returned resources are attributed.
After selection, the list of all the resources picked for that operation is displayed.

The screen changes when the work switches from the operation selection phase to the “Returns” recording phase. Both phases are described in the following paragraphs.

15.1.1. Operation selection - Filters

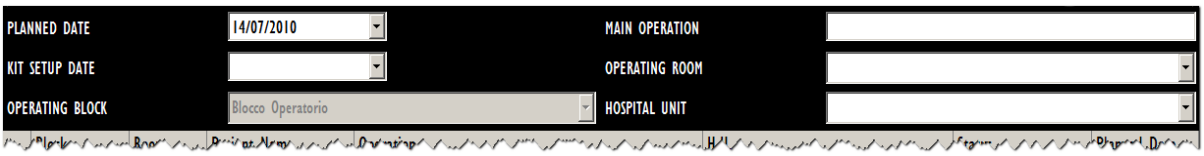


Fig 215 - Filters on the “Operation selection” screen

The available filters on this screen are:

- “Planned date” - Makes it possible to specify the planned date of the operation for which the kit has been prepared. The operations listed on this screen are all planned for the date here specified.
- “Kit setup date” - Makes it possible to specify the date in which the kit was set up.
- “Operating block” - Displays the operations of a specific operating block.
- “Main operation” - Displays only the specified main operation.
- “Hospital unit” - Displays the operations of a specific hospital unit.
- “Operating room” - Displays the operations of a specific room.

See paragraph 1.4.2 for general instructions on how the filters work.

15.1.2. Operation selection - Data area

The data area contains the list of operations corresponding to the values specified in the search fields.

	Block	Room	Patient Name	Operation	H.U.	Status	Planned Date
▶	Blocco Operatorio		VALLEY STREAM BESANAI...	Colecistectomia laparoscopica	CHIRURGIA GENERALE	Prepared	14/07/2010
	Blocco Operatorio		VALLEY STREAM BESANAI...	Colecistectomia laparoscopica	CHIRURGIA GENERALE	Prepared	14/07/2010
	Blocco Operatorio	Sala 2	SCHENECTADY VIBOVALE...	Addominoplastica	CHIRURGIA PLASTICA	Prepared	14/07/2010 08.00
	Blocco Operatorio	Sala 3	TAMARAC REGGIOCALABRIA	Lipofilling	CHIRURGIA PLASTICA	Totally returned	14/07/2010 08.00
			STREAMWOOD CORBETTA	FESS: 40 minuti	ORL E CH.CERVICO-FACCIALE	In preparation	14/07/2010
	Blocco Operatorio	Sala 1	SAN RAMON BRUGHERIO	Ort. - piede - alluce valgo - correzione Bosch	ORTOPEDIA E TRAUMATOLOGIA	In preparation	14/07/2010 08.00
	Blocco Operatorio	Sala 2	SCHENECTADY VIBOVALE...	Addominoplastica	CHIRURGIA PLASTICA	In preparation	14/07/2010 08.00
	Blocco Operatorio	Sala 3	TAMARAC PESCHIERABOR...	FIMOSI	UROLOGIA	To be prepared validated	14/07/2010

Fig 216

Each row corresponds to an operation.

For each operation the following information can be displayed:

- the operating block;
- the operating room;
- the patient name;
- the operation;
- the operation hospital unit
- the operation kit status
- the operation date and time.

There are 7 possible statuses for an operation kit. These are:

- to be prepared - meaning that the kit has not been prepared yet;
- to be prepared validated - meaning that the kit has not been prepared yet but it was reviewed, possibly modified and validated by the person in charge for this purpose (i.e. the pharmacy staff);
- in preparation - someone is managing the kit (either for validation or for preparation);
- prepared - the kit has been prepared;
- prepared no more valid - the kit has been prepared but something changed after preparation (i.e. the operation data, the kit structure, the resouces configured quantities in the kit etc.);
- partial return - some of the kit resources have been returned;
- total return - all of the kit resources have been returned.

The ▶ icon at the beginning of a row indicates the operation currently selected.

15.1.3. Operation selection - Command bar

The command bar contains several buttons (Fig 217). This paragraph explains the functions of each button.

△	▽			LABEL	PRINT		SEARCH		RETURN KIT

Fig 217 - Command bar

Use the arrow buttons ▼ and ▲ to scroll up and down the screen contents in case the items are too many to be displayed all together.

The **Label** button makes it possible to print the kit sticker label again, in case of need (see paragraph 14.8).
The **Print** button makes it possible to print the kit resources complete list again, in case of need (see paragraph 14.8).
Use the **Search** button to display the list of operations corresponding to the values specified in the search fields.
Use the **Return Kit** button to proceed with the "return" procedure. The **Return Kit** button opens the "Returns" recording screen, described in paragraph 15.2 and following.

15.2. "Operation kits give back" screen description

To access the "Operation kits give back" screen,

on the "Operation selection" screen (Fig 214),

- click the row corresponding to the operation for which the returns are being recorded.

The row is selected, the icon appears on the left.

- Click the **Return Kit** button on the command bar.

The following screen opens (Fig 218).

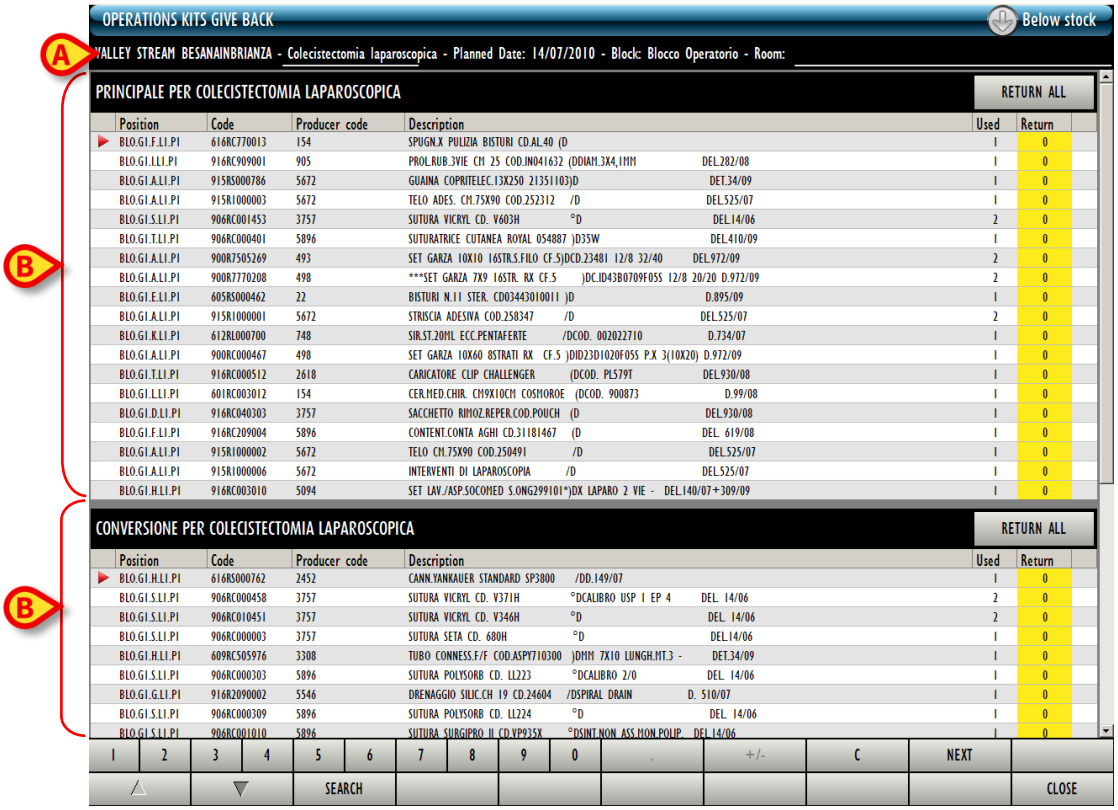
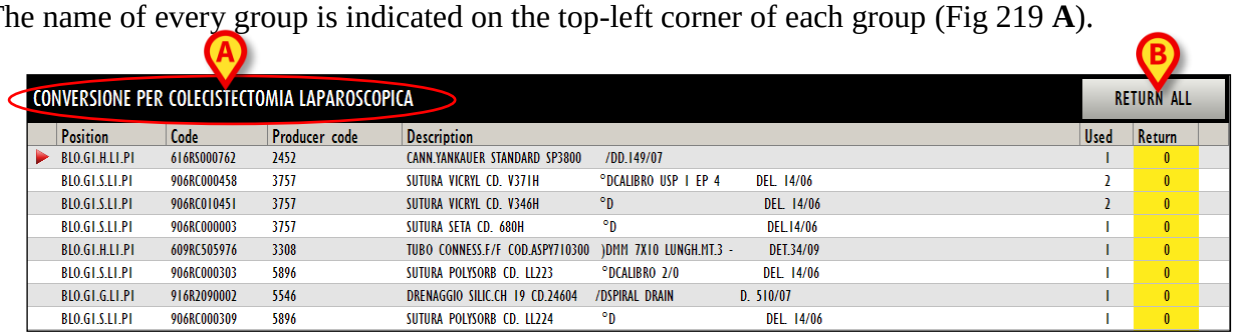


Fig 218 - Returns from kit

The screen displays on top the main operation data (patient name, operation, planned date and location - Fig 218 **A**).

All the resources that are part of the kit are displayed on screen, divided in groups corresponding to sub-kits (Fig 218 **B**).

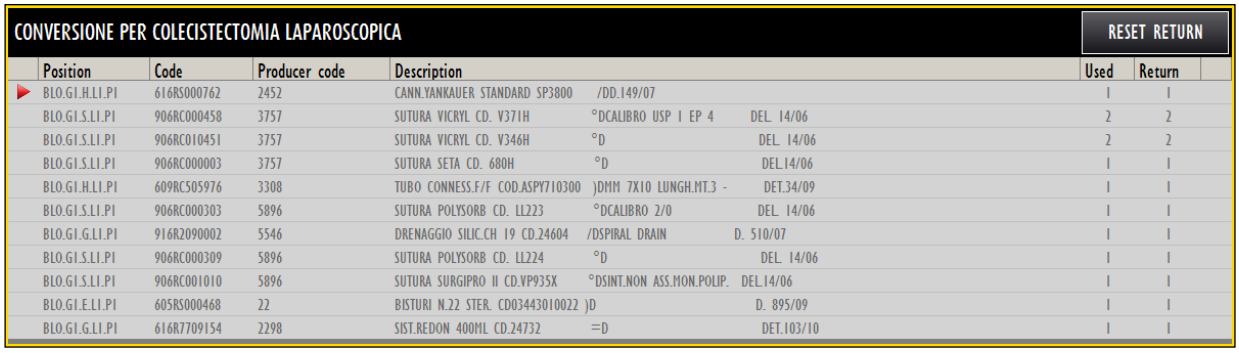
The name of every group is indicated on the top-left corner of each group (Fig 219 **A**).



Position	Code	Producer code	Description	Used	Return
BL0.G1.H.L1.P1	616RS000762	2452	CANN.YANKAUER STANDARD SP3800 /DD.149/07	1	0
BL0.G1.S.L1.P1	906RC000458	3757	SUTURA VICRYL CD. V371H °DCALIBRO USP 1 EP 4 DEL. 14/06	2	0
BL0.G1.S.L1.P1	906RC010451	3757	SUTURA VICRYL CD. V346H °D DEL. 14/06	2	0
BL0.G1.S.L1.P1	906RC000003	3757	SUTURA SETA CD. 680H °D DEL.14/06	1	0
BL0.G1.H.L1.P1	609RC505976	3308	TUBO CONNESS.F/F COD.ASPY710300)DMM 7X10 LUNGH.MT.3 - DET.34/09	1	0
BL0.G1.S.L1.P1	906RC000303	5896	SUTURA POLYSORB CD. LL223 °DCALIBRO 2/0 DEL. 14/06	1	0
BL0.G1.G.L1.P1	916R2090002	5546	DRENAGGIO SILIC.CH 19 CD.24604 /DSPIRAL DRAIN D. 510/07	1	0
BL0.G1.S.L1.P1	906RC000309	5896	SUTURA POLYSORB CD. LL224 °D DEL. 14/06	1	0

Fig 219 - Resources group

The **Return All** button on the right (Fig 219 **B**) makes it possible, with just one click, to return all the resources of a group at the same time. After clicking the button the list of resources appears as in Fig 220. The button turns to **Reset Return**. Click it to annul the procedure.



Position	Code	Producer code	Description	Used	Return
BL0.G1.H.L1.P1	616RS000762	2452	CANN.YANKAUER STANDARD SP3800 /DD.149/07	1	1
BL0.G1.S.L1.P1	906RC000458	3757	SUTURA VICRYL CD. V371H °DCALIBRO USP 1 EP 4 DEL. 14/06	2	2
BL0.G1.S.L1.P1	906RC010451	3757	SUTURA VICRYL CD. V346H °D DEL. 14/06	2	2
BL0.G1.S.L1.P1	906RC000003	3757	SUTURA SETA CD. 680H °D DEL.14/06	1	1
BL0.G1.H.L1.P1	609RC505976	3308	TUBO CONNESS.F/F COD.ASPY710300)DMM 7X10 LUNGH.MT.3 - DET.34/09	1	1
BL0.G1.S.L1.P1	906RC000303	5896	SUTURA POLYSORB CD. LL223 °DCALIBRO 2/0 DEL. 14/06	1	1
BL0.G1.G.L1.P1	916R2090002	5546	DRENAGGIO SILIC.CH 19 CD.24604 /DSPIRAL DRAIN D. 510/07	1	1
BL0.G1.S.L1.P1	906RC000309	5896	SUTURA POLYSORB CD. LL224 °D DEL. 14/06	1	1
BL0.G1.S.L1.P1	906RC001010	5896	SUTURA SURGIPRO II CD.VP935X °DSINT.NON ASS.MON.POLIP. DEL.14/06	1	1
BL0.G1.E.L1.P1	605RS000468	22	BISTURI N.22 STER. CD03443010022)D D. 895/09	1	1
BL0.G1.G.L1.P1	616R7709154	2298	SIST.REDON 400ML CD.24732 =D DET.103/10	1	1

Fig 220 - All resources returned

Each row on the list corresponds to a resource. For each resource the following information can be specified:

- resource position;
- resource code;
- manufacturer code;
- resource description;
- used quantity;
- returned quantity.

15.2.1. How to record the "Returns"

1. Click the row corresponding to the resource that must be returned.

The row is selected. The ▶ icon appears on the left.

2. Use the numeric buttons on the command bar to specify the returned resource quantity.

3. Click the **Update** button on the command bar.

OR

1. Click the “Returned quantity” cell (Fig 221) on the row corresponding to the resource that must be returned.

The row is selected. The icon appears on the left.

The quantity is highlighted inside the cell (Fig 221).

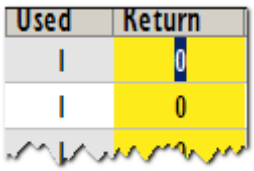


Fig 221

2. Use either the numeric buttons on the command bar or the workstation keyboard to specify the returned resource quantity.

3. Click the **Update** button on the command bar.

After clicking on **Update** button a print record listing the returned resources is created. A print preview is displayed.

The quantities specified in the “Used resource” cell are updated according to the new values. I.e.: if 5 items are picked of a certain resource and 2 items are returned, the “Used resources” cell, after updating, specifies “3”.

If the quantity of items returned is equal to or bigger than the quantity of picked items, the row corresponding to the resource disappears from the list displayed on screen.

An additional “Waste” column is displayed on the “Operation kits give back” screen if the “Waste” module is currently in use. In this case it is possible to indicate the possible waste as well. To do that click the “Waste” cell and then indicate the wasted resource quantity

15.2.2. Barcode reading for the “Return” procedure

When the “return from kit” screen is displayed the barcode reader can be used as search and selection tool.

Reading the barcode of the resource that must be returned increases the returned quantity (one unit).

To use this procedure

- read the barcode of the resource that must be returned.

The quantity displayed in the “Returned resources” cell is increased of one unit.

- Click the **Update** button on the command bar.

If the kit’s main barcode is scanned all the resources are returned at once.

16. Generic kits management procedures

A “generic kit” is a kit that is not associated to a specific operation. Generic kits are prepared in advance and kept in a stocroom to be used at need.

The procedures relating to the generic kits management can be described in three main phases:

1. generic kit creation (described in this paragraph);
2. existing generic kits monitoring and management (described in this paragraph);
3. generic kit association to a specific operation (described in paragraph 17).

A specific procedure exists, to associate a generic kit to an emergency operation (this procedure is described in paragraph 18).

Generic kits creation, monitoring and management procedures are performed on the “Generic kit management” module.

To access this module

- click the corresponding icon

on the lateral bar.

The following screen opens (Fig 222).

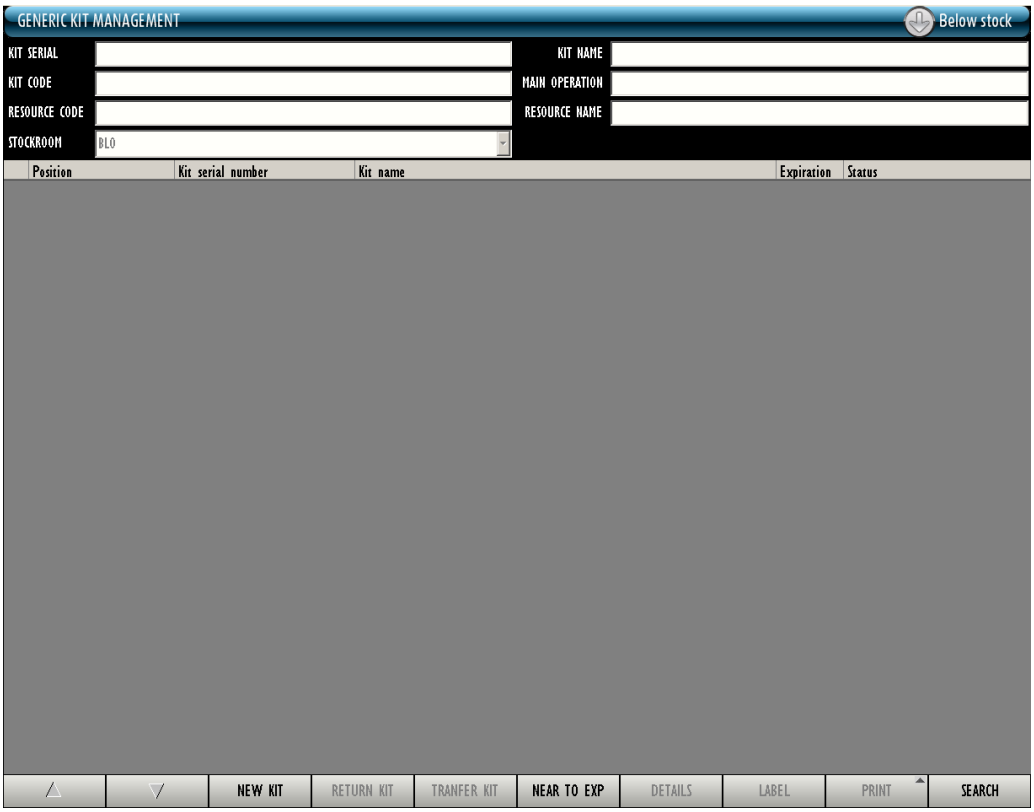


Fig 222 - Generic kits management

16.1. “Generic kit management” - Screen structure

The “Return from kit” screen is structured according to the general description offered in paragraph 1.4, see this paragraph for the screen general features. The present paragraph describes the screen specific features.

16.1.1. Filters

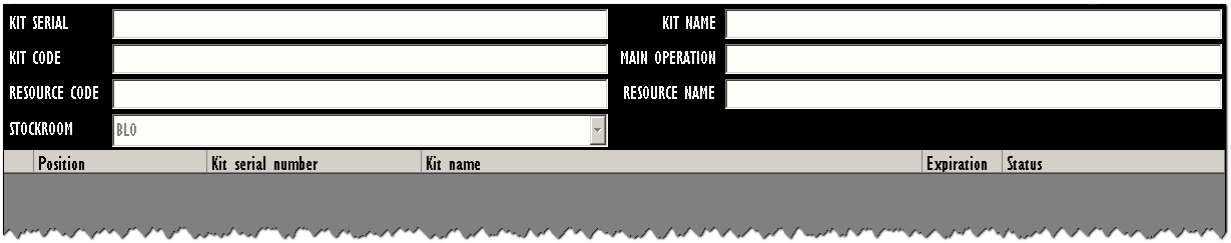


Fig 223 - Filters on the “Generic kits management” screen

The filters available on the “Generic kits management” screen (Fig 223) are:

- “Kit serial” - It makes it possible to specify the serial number of the kit that must be displayed.
- “Kit code” - It makes it possible to specify the code of the specific kit that must be displayed.
- “Resource code” - It makes it possible to insert the code of a resource belonging to the kit that must be displayed. The list of all the kits containing the resource is this way displayed.
- “Stockroom” - It makes it possible to select the relevant stockroom. This is not properly a filter: the stockroom specification is necessary to indicate the stockroom from which the resources are picked.
- “Kit name” - It makes it possible to specify the name of the specific kit that must be displayed.
- “Main operation” - It makes it possible to specify the name of the main operation to which the kit that must be displayed refers. The list of all the kits referring to the main operation indicated in this filter is displayed (please note: it is a “standard operation”, not a specific intervention)
- “Resource name” - It makes it possible to insert the name of a resource belonging to the kit that must be displayed. The list of all the kits containing the resource is this way displayed.

See paragraph 1.4.2 for instruction on the use of filters in the DIGISTAT® “Stock Management” system.

16.1.2. Data area

The data area displays the list of kits corresponding to the values specified in the filters.

To display the list of kits,

- specify the values of the filters (Fig 224 **A**).
- Click the **Search** button on the command bar (Fig 224 **B**).

The list of kits is displayed as a table (Fig 224 **C**). If no value is specified the system displays the list of all the existing kits.

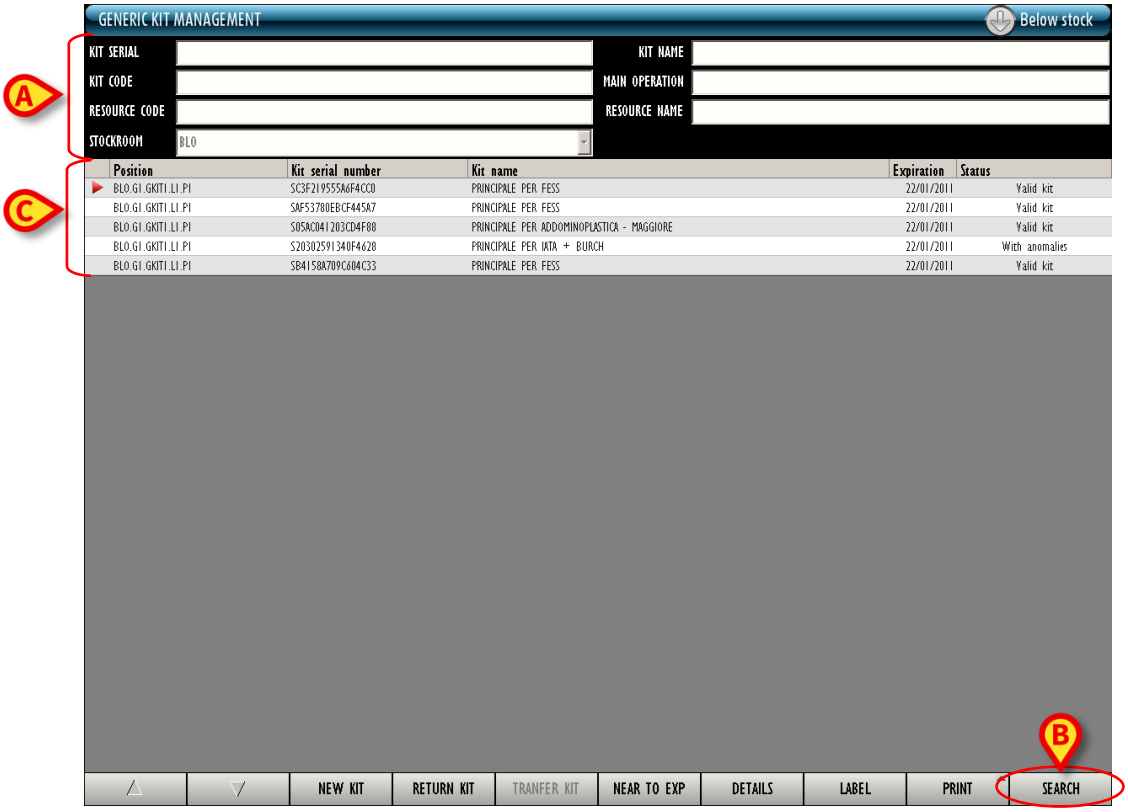


Fig 224 - Generic kits list

The kit search can be performed by barcode reader. In this case a single row is displayed, corresponding to the kit whose barcode is scanned. Then, in the following procedures "Kit return" and "Kit transfer" (paragraphs 16.3 and 16.4) the kit serial number (or kit barcode specification) is not necessary.

Each row on the table corresponds to a kit. For each kit the following information can be specified:

- the position;
- the kit serial number;
- the kit name;

- the kit expiration date;
- the kit status.

There are three possible statuses for a generic kit:

- valid kit - it means that the kit contains all and only the resources forming the “standard” kit;
- kit with anomalies - it means that there are differences between the resources actually in the kit and the resources forming the “standard” kit. A kit “with anomalies” can be associated to an operation or transferred to another position only by users having specific permissions, otherwise only the “return from kit” procedure can be activated;
- expired kit - the expired kits are highlighted red. An expired kit can be associated to an operation or transferred to another position only by users having specific permissions, otherwise only the “return from kit” procedure can be activated.

The icon at the beginning of a row indicates the selected kit.

16.1.3. Command bar

This paragraph explains the functionalities relating to each button on the command bar (Fig 225).

Fig 225 - Command bar

Use the arrow buttons and to scroll up and down the screen contents in case the items are too many to be displayed all together.

Use the **New Kit** button to create a new generic kit. The procedure is described in paragraph 16.2.

The **Return Kit** button activates the “Generic kit return” procedure, described in paragraph 16.3.

Use the **Transfer Kit** button to activate the “Generic kit transfer” procedure, described in paragraph 16.4.

The **Near to Exp.** button, when selected, displays only those generic kits that are close to expiration. The proximity is set by configuration. The button, after clicked, appears as selected.

Use the **Details** button to display the details of a selected kit (see paragraph 16.5).

The **Label** button makes it possible to print the kit sticker label again.

The **Print** button opens a menu containing two options (Fig 226).

Fig 226

The “Print screen” option creates a report summarizing the contents of the screen currently displayed.
The “Print kit” option creates a report listing the resources that are part of a selected kit. In both cases a print preview is displayed.

Use the **Search** button to display the list of existing generic kits on the “generic kits management” screen. See paragraph 16.1.2.

16.2. How to create a new generic kit

To create a new generic kit,

- use the “Stockroom” filter to select the stockroom from which the resources will be picked.

The name of the selected stockroom is displayed in the “Stockroom” field.

- click the **New Kit** button on the command bar.

The “Standard operation selection” screen opens (Fig 227).

Fig 227 - Standard operation selection

This screen makes it possible to specify the standard operation (i.e. the type of operation) for which the kit is being created.

The filters indicated in Fig 227 **A** make it possible to search for the relevant standard operation. You can search by either the name or the code of the standard operation.

- Insert either the code or the name of the operation in the fields indicated Fig 228 **A**.
- Click the **Search** button on the command bar (Fig 228 **B**).
- The list of operations matching the specified values is displayed (Fig 228 **C**).

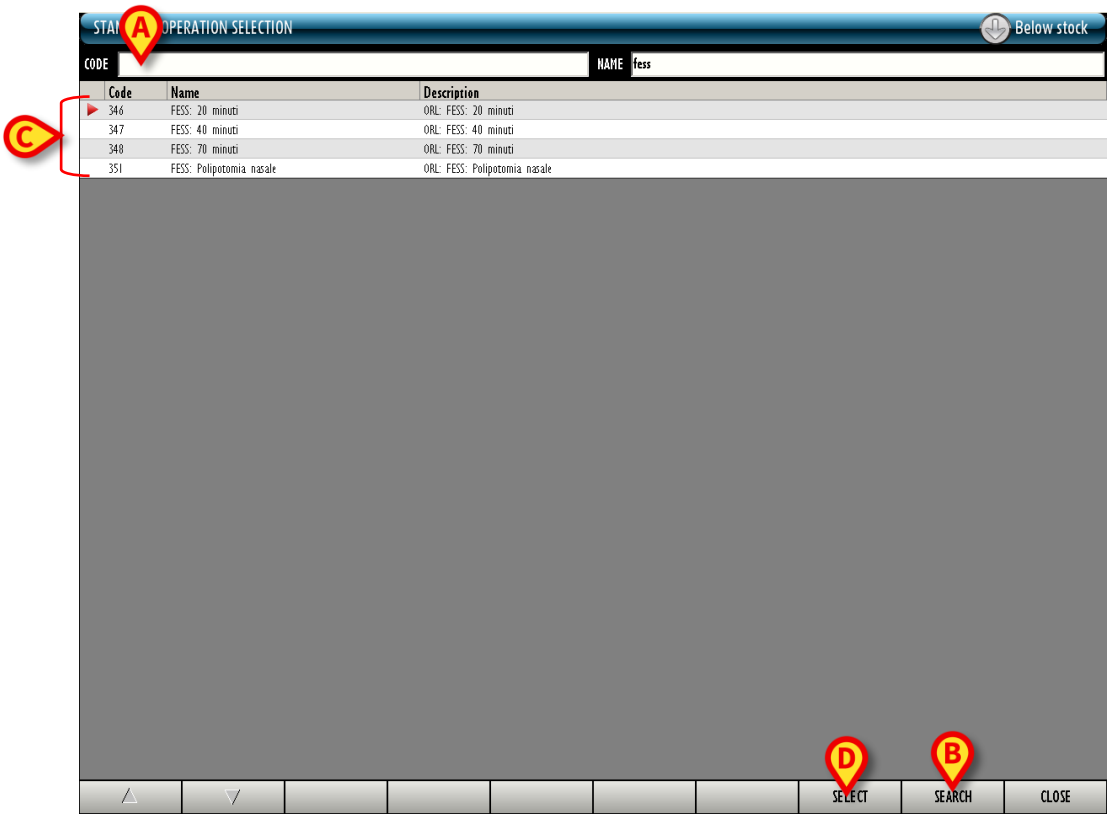


Fig 228

- Click the row corresponding to the relevant standard operation.

The icon appears at the beginning of the selected row.

- Click the **Select** button on the command bar (Fig 228 **D**).

The following screen opens (Fig 229 - Standard kit selection).

Fig 229 - Standard kit selection

This screen displays the list of the possible kits for the standard operation selected in the previous screen.

If, for an operation, several kits exist it is possible to choose which kits are going to be prepared by either selecting or deselecting the checkbox placed at the beginning of the row corresponding to the kit (Fig 230).

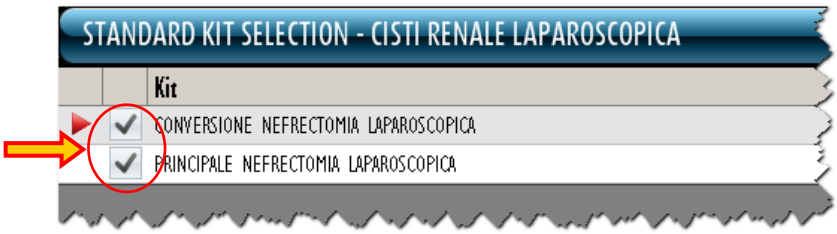


Fig 230 - 2 kits configured for the same operation

If one of the checkboxes is deselected the corresponding row changes as in Fig 231. Only the selected kits are prepared.

Fig 231 - Only one kit will be prepared

For each kit the available quantity is indicated (Fig 232 **A**).

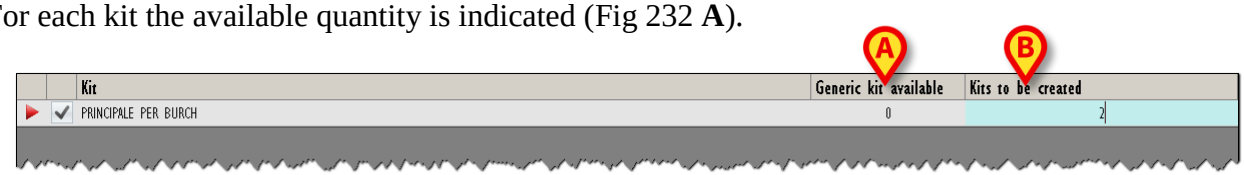


Fig 232

- Insert the number of generic kits to be created in the field indicated in Fig 232 **B**.
- Click the **Continue** button on the command bar (Fig 229 **C**).

A print report is generated, containing the list of resources that are part of the kit. A print preview is displayed (Fig 233).

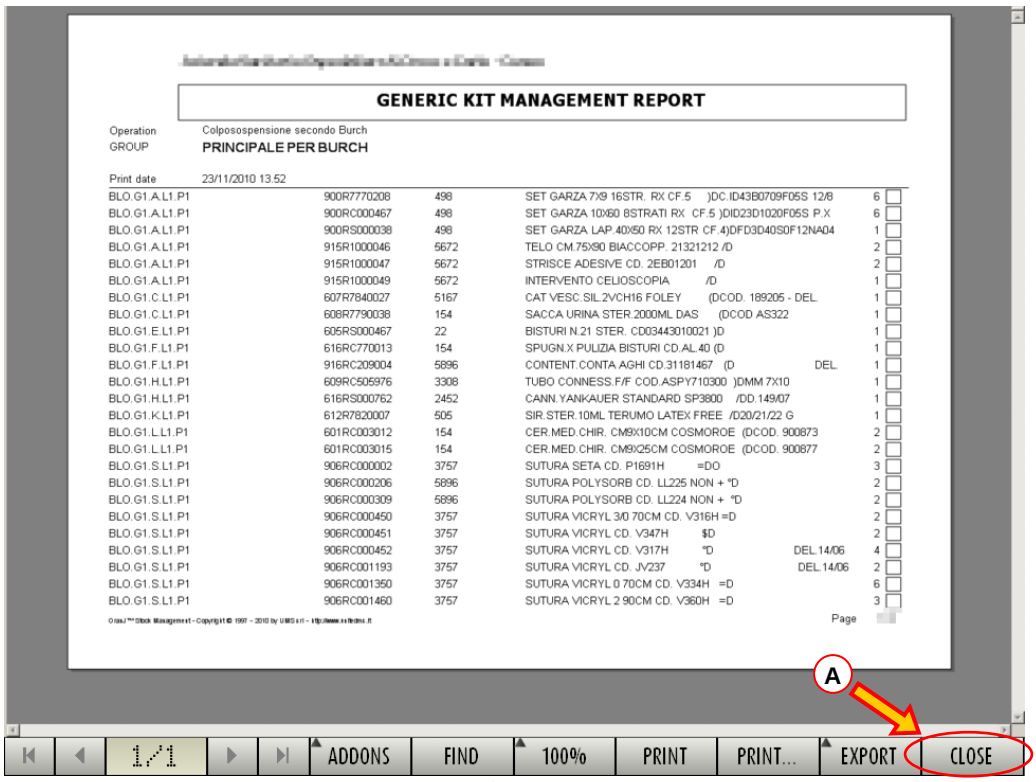


Fig 233

- Close the print preview (Fig 233 **A**).

The generic kit creation screen opens (Fig 234). This screen is described in detail in paragraph 16.2.1.

Fig 234

Insert the kit's resources (either manually or by barcode scan). See paragraphs 14.6, 14.7 and 14.8 for a detailed description of the resources specification procedures.

- Specify the kit's expiration date in the field indicated in Fig 235 **B**.
- Specify the stockroom in which the kit will be located (use the field indicated in Fig 235 **C** for this purpose). Selection is enabled only if several options are available.

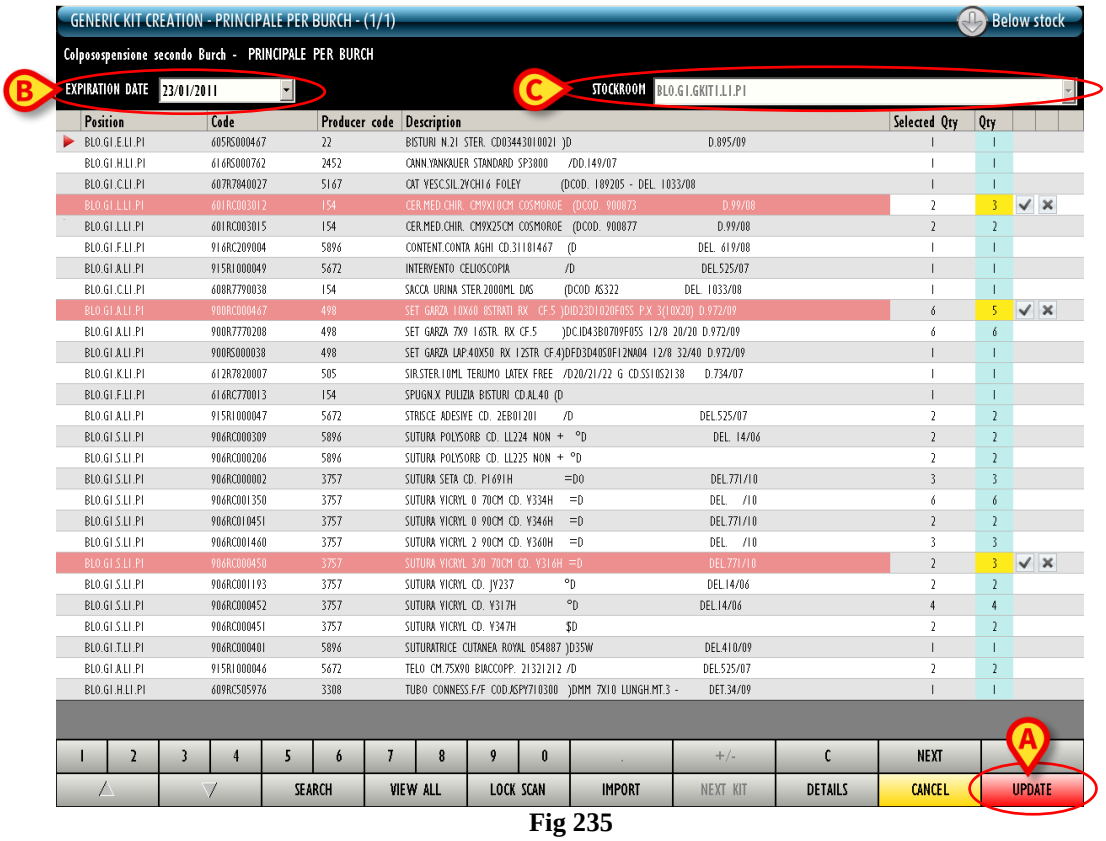


Fig 235

- Click the **Update** button on the command bar (Fig 235 **A**).

A window opens, making it possibile to specify the number of sticker labels to be printed (Fig 236).

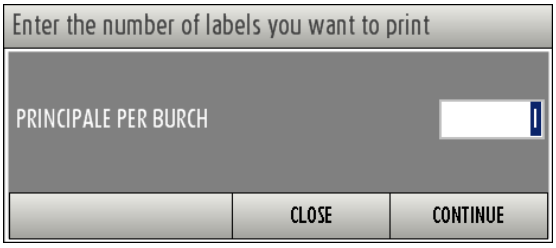
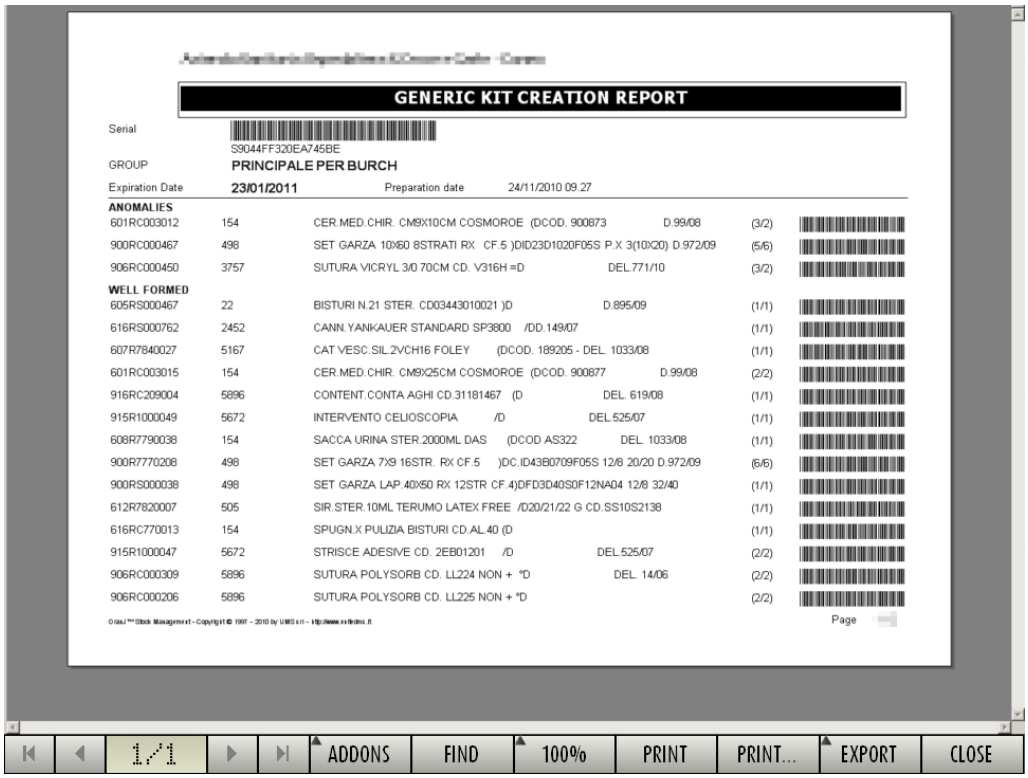


Fig 236

- Specify the number of labels.
- Click the **Continue** button on the window.

The system creates now the print report to be inserted in the kit envelope. A print preview is displayed (Fig 237).



GENERIC KIT CREATION REPORT

Serial S9044FF320EA745BE

GROUP PRINCIPALE PER BURCH

Expiration Date 23/01/2011 Preparation date 24/11/2010 09.27

ANOMALIES				
601RC003012	154	CER.MED.CHIR. CM9X10CM COSMOROE (DCOD. 900873 D.99/08	(3/2)	
900RC000467	498	SET GARZA 10X60 8STRATI RX CF.5)DID23D1020F05S P.X 3(10X20) D.972/09	(5/6)	
906RC000450	3757	SUTURA VICRYL 3/0 70CM CD. V316H =D DEL.771/10	(3/2)	
WELL FORMED				
605RS000467	22	BISTURI N.21 STER. CD03443010021)D D.895/09	(1/1)	
616RS000762	2452	CANN.YANKAUER STANDARD SP3800 /DD.149/07	(1/1)	
607R7840027	5167	CAT.VESC.SIL.2VCH16 FOLEY (DCOD. 189205 - DEL. 1033/08	(1/1)	
601RC003015	154	CER.MED.CHIR. CM9X25CM COSMOROE (DCOD. 900877 D.99/08	(2/2)	
916RC209004	5896	CONTENT.CONTA AGHI CD.31181467 (D DEL. 619/08	(1/1)	
915R1000049	5672	INTERVENTO CELIOSCOPIA /D DEL.525/07	(1/1)	
608R7790038	154	SACCA URINA STER.2000ML DAS (DCOD AS322 DEL. 1033/08	(1/1)	
900R7770208	498	SET GARZA 7X9 16STR. RX CF.5)DC.ID43B0709F05S 12/8 20/20 D.972/09	(6/6)	
900RS000038	498	SET GARZA LAP.40X50 RX 12STR CF.4)DFD3D40S0F12NA04 12/8 32/40	(1/1)	
612R7820007	505	SIR.STER.10ML TERUMO LATEX FREE /D20/21/22 G CD.SS10S2138	(1/1)	
616RC770013	154	SPUGN.X PULIZIA BISTURI CD.AL.40 (D	(1/1)	
915R1000047	5672	STRISCE ADESIVE CD. 2EB01201 /D DEL.525/07	(2/2)	
906RC000309	5896	SUTURA POLYSORB CD. LL224 NON + *D DEL. 14/06	(2/2)	
906RC000206	5896	SUTURA POLYSORB CD. LL225 NON + *D	(2/2)	

Page

1/1 ADDONS FIND 100% PRINT PRINT... EXPORT CLOSE

Fig 237

- Close the print preview.

The generic kit creation procedure concludes here. If, in the “Standard kit creation” screen, more than one kit was indicated in the “kits to be created” column (Fig 229 **B**) the system goes to the beginning of the creation procedure of following kit (Fig 234). The screen header indicates the number of the kit we are creating (in Fig 238 the second kit of three is being created).

Fig 238

When the last kit is created the system goes back to the generic kit management screen.

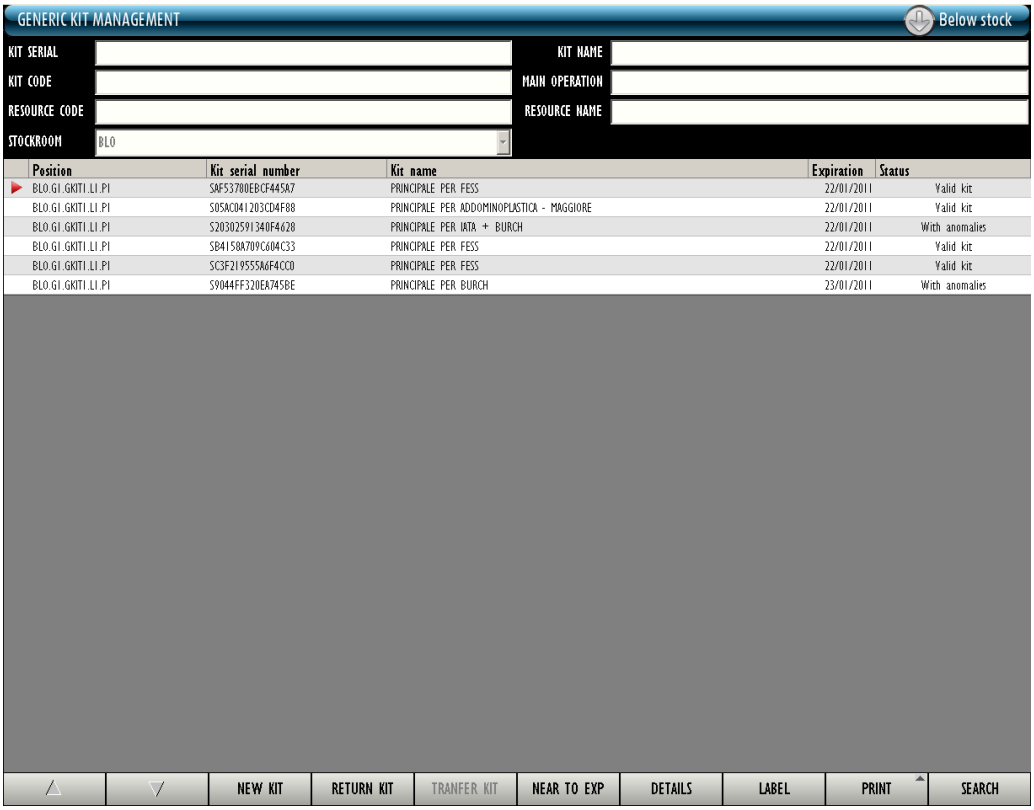


Fig 239

16.2.1. Generic kit creation screen description

The generic kit creation screen, shown in Fig 240, is formed of three main areas:

- the header (Fig 240 **A**);
- the data area (Fig 240 **B**);
- the command bar (Fig 240 **C**).

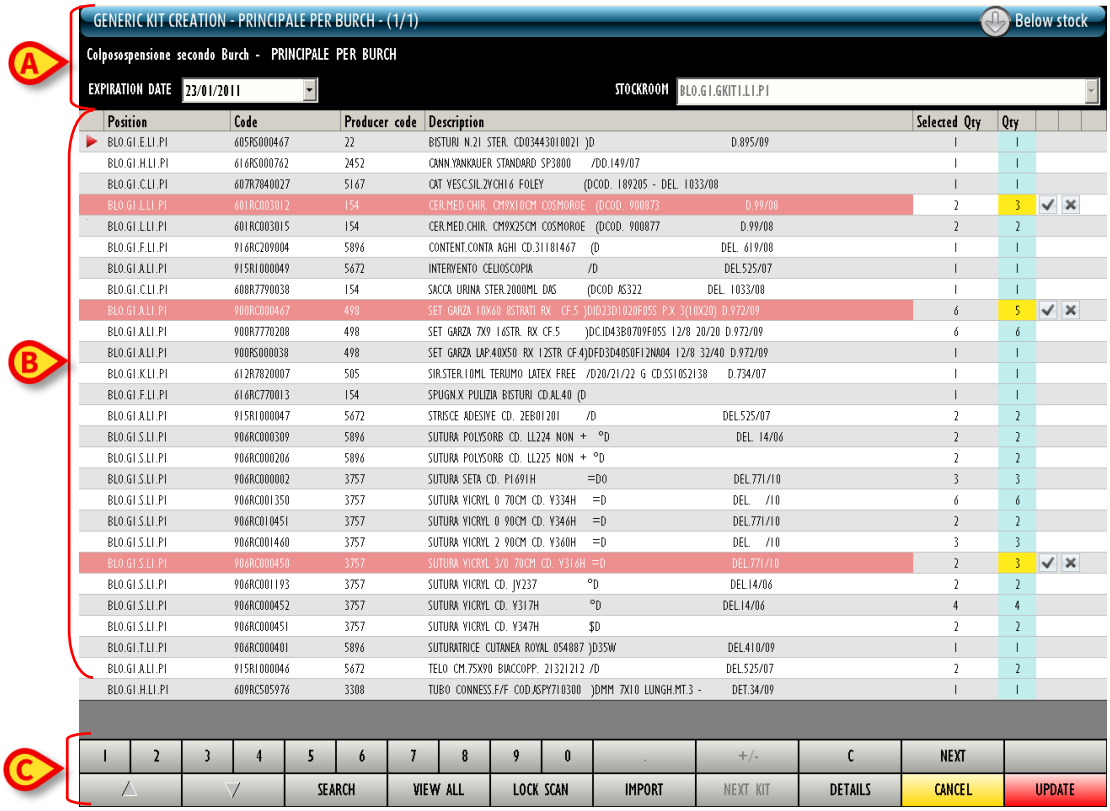


Fig 240

The following paragraphs describe these three areas.

16.2.1.1. Header

The header displays, in the blue bar on top of the page, alongside the name of the screen ("generic kit creation"), the name of the kit we are creating ("Principale per IATA…" in the example shown in Fig 241) and the indication of the number of kit we are creating relating to the required total (2/3 in the example).

Fig 241 - Header

Under the blue bar the name of the kit is displayed again.

The field indicated in Fig 241 **A** makes it possible to specify the expiration date of the kit being created.
The field indicated in Fig 241 **B** makes it possible to specify the stockroom in which the kit being created is going to be located. The field is enabled only if several options are available.

16.2.1.2. The data area

The data area shows the list of resources that are progressively recorded and inserted in the kit. The resources are listed in a table (Fig 240 **B**).
The list "grows" as the resources are inserted (either manually or by barcode scan). Each row corresponds to a resource (Fig 242).

Position	Code	Producer code	Description		Selected Qty	Qty
BL0.G1.E.LI.PI	605RS000467	22	BISTURI N.21 STER. CD03443010021)D	D.895/09	2	2

Fig 242 - Resource

The information that can be provided for each resource is:

- position from which the resource is picked;
- resource code;
- producer code;
- resource description;
- needed quantity;
- recorded quantity.

The icon placed on the left of a row indicates the selected row.
The mandatory fields are highlighted light blue.
The possible fields highlighted yellow must be specified by the user (Fig 243).

Position	Code	Producer code	Description		Selected Qty	Qty
	605RS000467	22	BISTURI N.21 STER. CD03443010021)D	D.895/09	2	2

Fig 243

To specify one of the fields, click the field and type the information required. Sometimes a drop down menu containing the possible options is available (Fig 244).

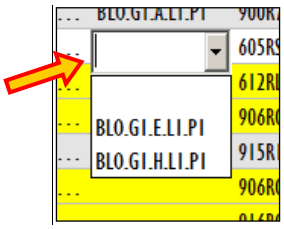


Fig 244 - Selection

Numeric values can be inserted using both the numeric buttons on the command bar and the physical workstation keyboard.

16.2.1.3. The command bar

The command bar (Fig 245) is formed of several buttons. This paragraph lists briefly the functionalities relating to the different buttons, indicating successive paragraphs when more detailed instructions on a specific functionality are necessary.

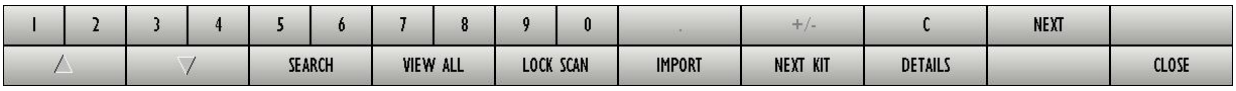


Fig 245 - Command bar

The buttons in the upper line make it possible to manage the numeric data specification.

Fig 246 - Numeric buttons

Use the numeric buttons (Fig 246) to indicate the quantities. Click one of the numbers to write the number in the "Quantity" field.

The " **.** " button is a decimal divider. The button is active only if decimal specification is relevant.
The "**+/-**" button makes it possible to specify whether a value is negative or positive. The button is active only if negative values specification is relevant.

The " **C** " button brings back to zero the specified quantities.

The **Next** button selects the item following the one currently selected.

The lower line of the command bar contains the following buttons.

Use the arrow buttons and to scroll up and down the screen contents in case the items are too many to be displayed all at the same time.

Use the **Search** button to access the system's search functionalities (described in paragraph 22).

Use the **View All** button to display the complete list of resources needed for the selected kit. See paragraph 14.6.6 for a description of this functionality.

Use the **Lock Scan** button to lock the workstation while reading numerous barcodes that will be recorded all together afterwards. See paragraph 14.6.3 for a description of the related procedures.

Use the **Import** button to import the selected items using a wireless barcode reader with internal memory. See paragraph 14.6.5 for the instructions relating to this option.

Use the **Next Kit** button to create the successive kit. I.e. if the second kit is being prepared of four required, this button can be clicked to directly create the third kit.

Use the **Details** button to create a print report containing the full list of resources that are part of the kit (an example is shown in Fig 233).

Use the **Close** button to close the current screen.

When editing the screen contents the **Update** and **Cancel** buttons are displayed on the command bar.

Use the **Update** button to save the changes made. After every editing it is necessary to click the **Update** button to save the changes.

The **Cancel** button annuls all the changes made.

16.2.2. Kit resources recording procedures

The procedures that must be activated to record the resources of a generic kit are the same used to record the resources of the kits associated to a specific operation. See paragraphs 14.6, 14.7 and 14.8 for a detailed description of these procedures.
The procedure described in paragraph 0 (“Start scan”) is not active for the creation of generic kits, therefore it is not relevant in this context.

16.3. How to return a generic kit

To return a generic kit, on the generic kits management screen (Fig 247),

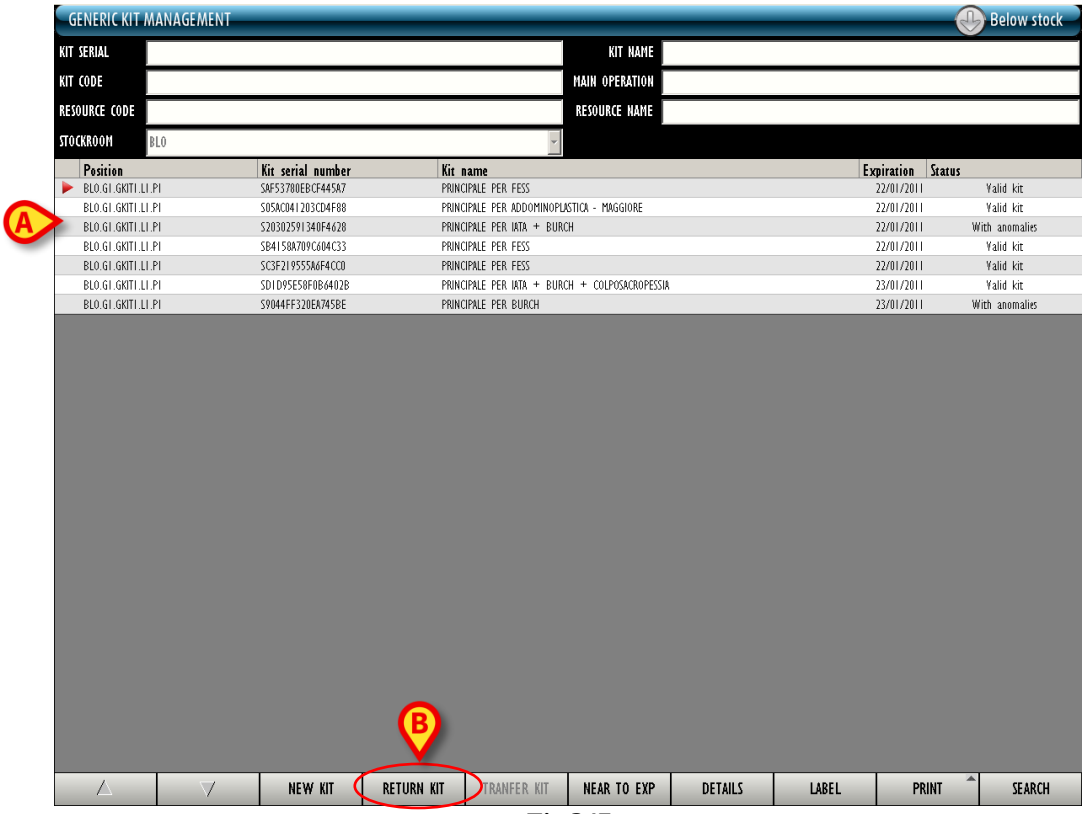


Fig 247

- click the row corresponding to the kit that must be returned.

The ▶ icon appears on the left (Fig 247 **A**).

- Click the **Return Kit** button on the command bar (Fig 247 **B**).

The following screen opens (Fig 248).

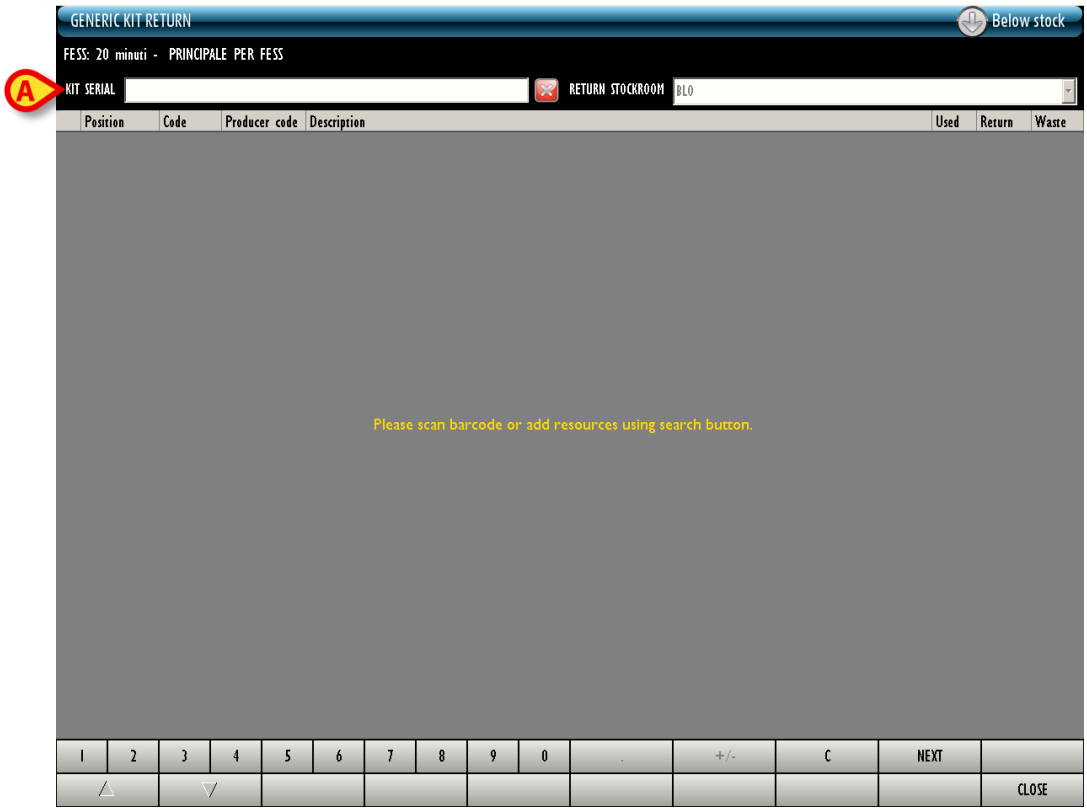


Fig 248 - Generic kit return

- Either insert the kit serial number in the field indicated in Fig 248 **A**, or scan the kit's barcode.

If, in the generic kit management screen (Fig 247), the kit is selected by barcode scan, it is not necessary to insert the kit serial number or to scan the kit's barcode again.

If the serial number is correct the screen changes in the way shown in Fig 249, displaying the list of resources that are part of the kit.

The "return stockroom" field placed on the right is enabled only if it is possible to return the kit to more than one stockroom. In these cases stockroom specification is required.

Fig 249

The screen shown in Fig 249 makes it possible to indicate the possible waste of the resources that are part of the kit.

To specify a waste

- Click the “Waste” cell on the row corresponding to the resource to be wasted (Fig 250).

The number in the cell is this way highlighted.

- Insert the number of “wasted” items using either the workstation keyboard or the numeric buttons on the command bar.

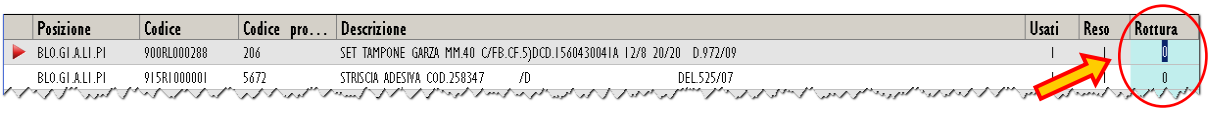


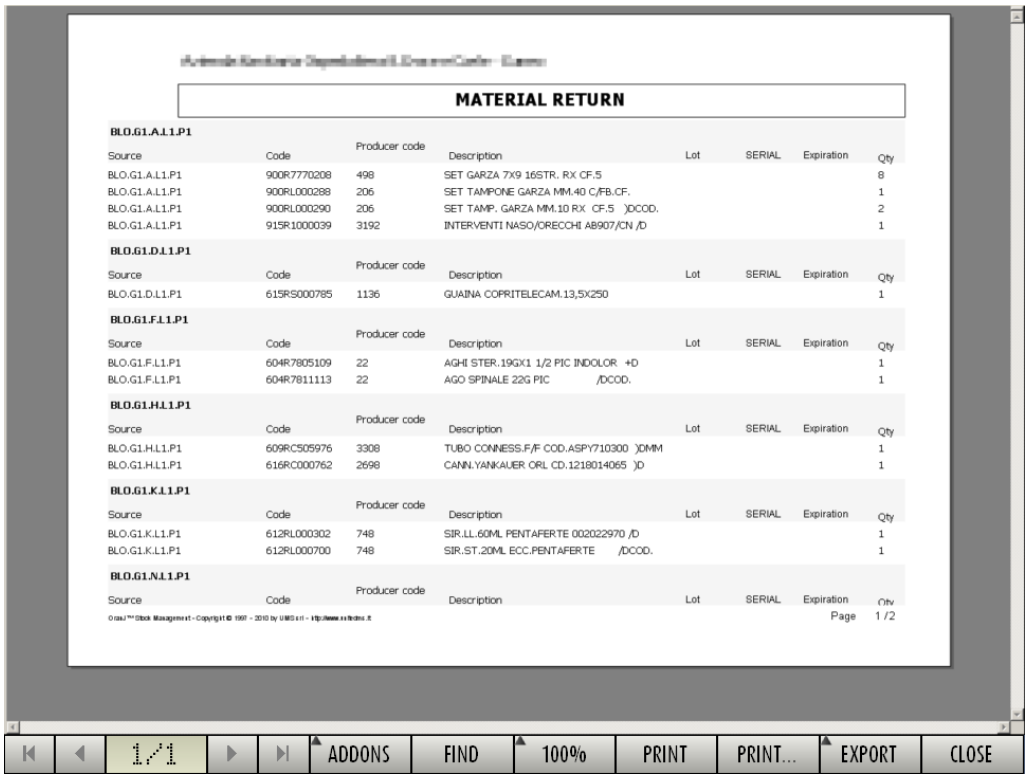
Fig 250

Repeat this procedure for all the wasted resources.

- Click the **Update** button on the command bar.

The return from kit is this way recorded.

A print report is created, listing all the resources that must be returned, and indicating for each resource the position (Fig 251). A print preview is displayed. The report can be printed and used to bring the resources back to their original positions.



MATERIAL RETURN

BLO.G1.A.L1.P1

Source	Code	Producer code	Description	Lot	SERIAL	Expiration	Qty
BLO.G1.A.L1.P1	900R7770208	498	SET GARZA 7X9 16STR. RX CF.5				8
BLO.G1.A.L1.P1	900RL000288	206	SET TAMPONE GARZA MM.40 C/FB.CF.				1
BLO.G1.A.L1.P1	900RL000290	206	SET TAMP. GARZA MM.10 RX CF.5)DCOD.				2
BLO.G1.A.L1.P1	915R1000039	3192	INTERVENTI NASO/ORECCHI AB907/CN /D				1

BLO.G1.D.L1.P1

Source	Code	Producer code	Description	Lot	SERIAL	Expiration	Qty
BLO.G1.D.L1.P1	615RS000785	1136	GUAINA COPRITELECAM.13,5X250				1

BLO.G1.F.L1.P1

Source	Code	Producer code	Description	Lot	SERIAL	Expiration	Qty
BLO.G1.F.L1.P1	604R7805109	22	AGHI STER.19GX1 1/2 PIC INDOLOR +D				1
BLO.G1.F.L1.P1	604R7811113	22	AGO SPINALE 22G PIC /DCOD.				1

BLO.G1.H.L1.P1

Source	Code	Producer code	Description	Lot	SERIAL	Expiration	Qty
BLO.G1.H.L1.P1	609RC505976	3308	TUBO CONNESS.F/F COD.ASPY710300)DMM				1
BLO.G1.H.L1.P1	616RC000762	2698	CANN.YANKAUER ORL CD.1218014065)D				1

BLO.G1.K.L1.P1

Source	Code	Producer code	Description	Lot	SERIAL	Expiration	Qty
BLO.G1.K.L1.P1	612RL000302	748	SIR.LL.60ML PENTAFERTE 002022970 /D				1
BLO.G1.K.L1.P1	612RL000700	748	SIR.ST.20ML ECC.PENTAFERTE /DCOD.				1

BLO.G1.N.L1.P1

Source	Code	Producer code	Description	Lot	SERIAL	Expiration	Qty

Page 1 / 2

Fig 251

When the print preview is closed the generic kits management screen is displayed again (Fig 252).

16.4. How to transfer a generic kit

To record the transfer of a generic kit, on the generic kit management screen (Fig 252),

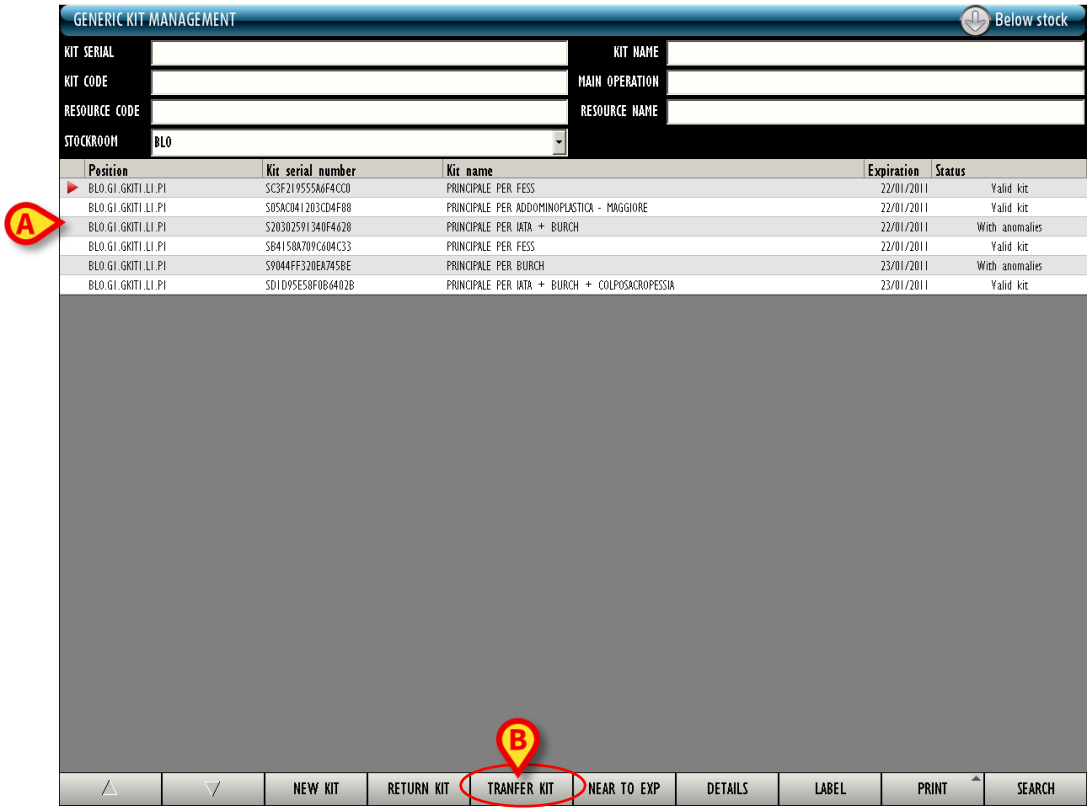


Fig 252

- click the row corresponding to the kit that must be transferred.

The ▶ icon appears on the left (Fig 252 **A**).

- Click the **Transfer Kit** button on the command bar (Fig 252 **B**).

The following screen opens (Fig 253).

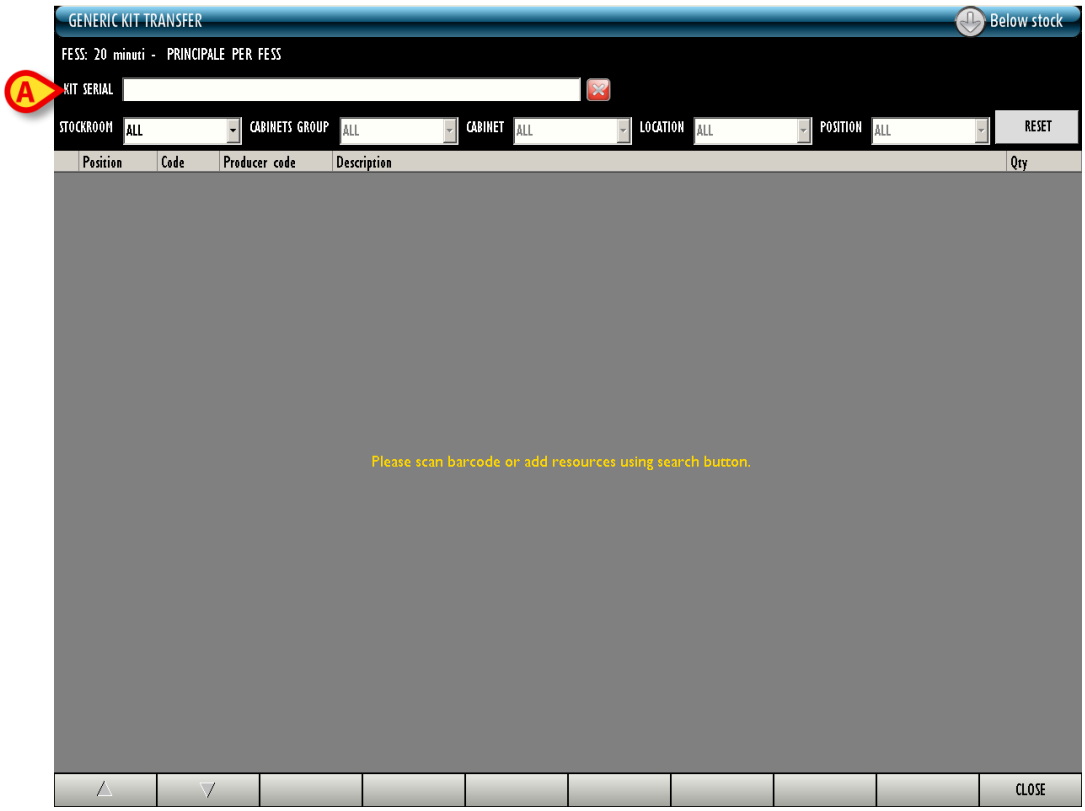


Fig 253

- Either insert the kit serial number in the field indicated in Fig 253 **A**, or scan the kit barcode.

If, in the generic kit management screen (Fig 252) the kit is selected by barcode scan, it is not necessary to insert the kit serial number or to scan the kit's barcode again.

- Specify the destination stockroom in the field indicated in Fig 254 **A**.

The screen changes to display the list of resources that will be transferred (Fig 254).

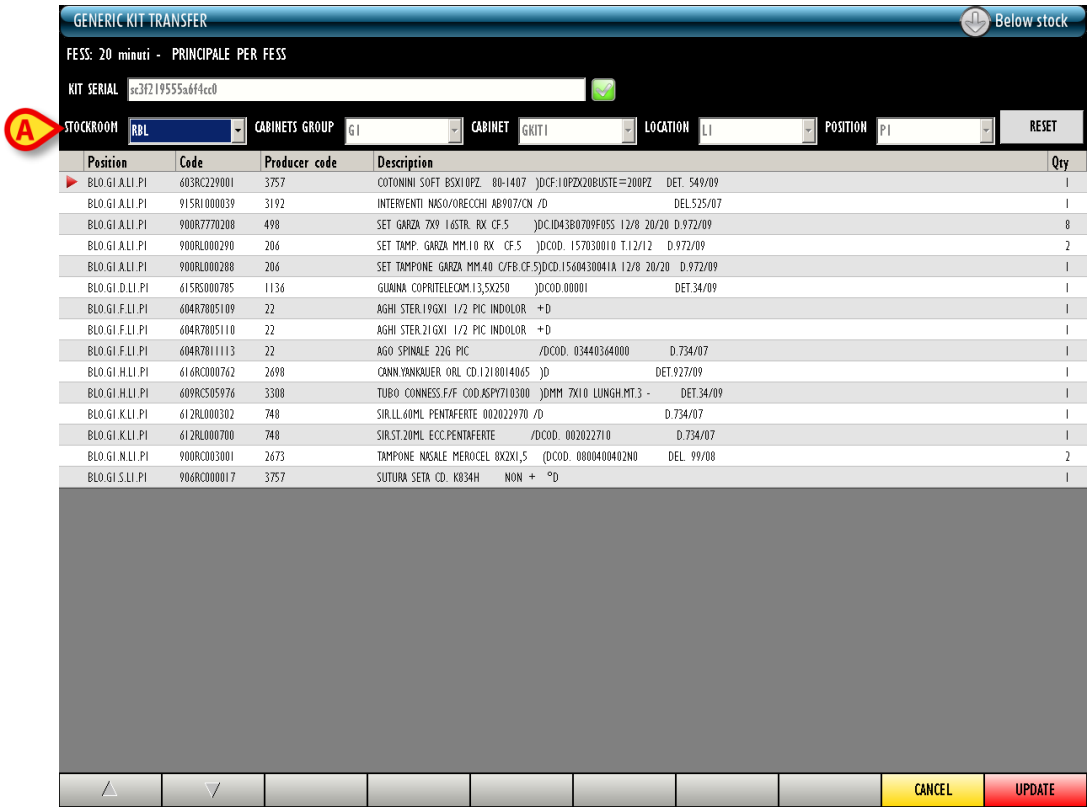


Fig 254

- Specify, in the “Cabinet group”, “Cabinet”, “Location”, “Position” fields (indicated in Fig 254 **A**) the kit’s new destination. If the fields are not enabled it means that only one destination is available.

- Click the **Update** button on the command bar.

The kit transfer is this way recorded. The generic kit management screen is displayed again (Fig 252).

16.5. How to display the kit details

To display the details of a generic kit, on the generic kits management screen (Fig 255),

Fig 255

- click the row corresponding to the kit whose details must be displayed.

The ▶ icon is displayed on the left (Fig 255 **A**).

- Click the **Details** button on the command bar (Fig 255 **B**).

The screen changes in the following way (Fig 256). The details of the selected kit are displayed in the area shown in Fig 256 **A**.

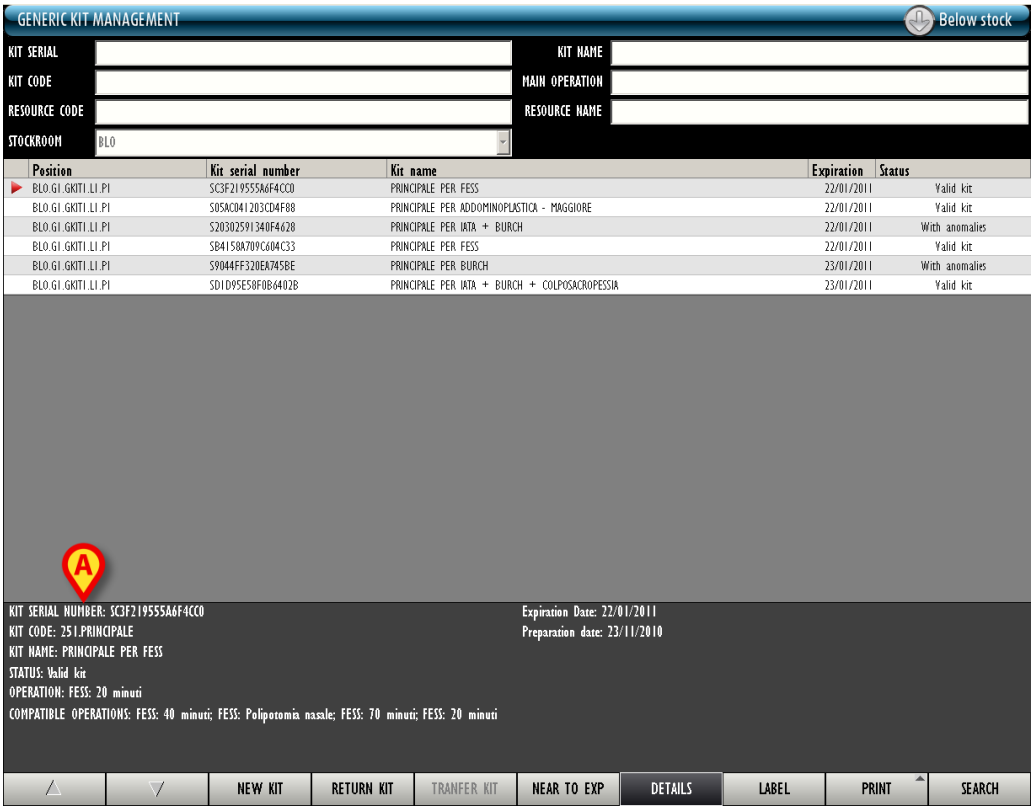

GENERIC KIT MANAGEMENT
Below stock
KIT SERIAL
KIT NAME
KIT CODE
MAIN OPERATION
RESOURCE CODE
RESOURCE NAME
STOCKROOM
BL0
Position
Kit serial number
Kit name
Expiration
Status
BL0.G1.GKIT1.L1.P1 SC3F219555A6F4CC0 PRINCIPALE PER FESS 22/01/2011 Valid kit
BL0.G1.GKIT1.L1.P1 S05AC041203CD4F88 PRINCIPALE PER ADDOMINOPLASTICA - MAGGIORE 22/01/2011 Valid kit
BL0.G1.GKIT1.L1.P1 S20302591340F4628 PRINCIPALE PER IATA + BURCH 22/01/2011 With anomalies
BL0.G1.GKIT1.L1.P1 SB4158A709C604C33 PRINCIPALE PER FESS 22/01/2011 Valid kit
BL0.G1.GKIT1.L1.P1 S9044FF320EA745BE PRINCIPALE PER BURCH 23/01/2011 With anomalies
BL0.G1.GKIT1.L1.P1 SD1D95E58F0B6402B PRINCIPALE PER IATA + BURCH + COLPOSACROPESSIA 23/01/2011 Valid kit
A
KIT SERIAL NUMBER: SC3F219555A6F4CC0
KIT CODE: 251.PRINCIPALE
KIT NAME: PRINCIPALE PER FESS
STATUS: Valid kit
OPERATION: FESS: 20 minuti
COMPATIBLE OPERATIONS: FESS: 40 minuti; FESS: Polipotomia nasale; FESS: 70 minuti; FESS: 20 minuti
Expiration Date: 22/01/2011
Preparation date: 23/11/2010
NEW KIT
RETURN KIT
TRANFER KIT
NEAR TO EXP
DETAILS
LABEL
PRINT
SEARCH

Fig 256

17. Associating a generic kit to an operation

To associate a generic kit to an operation,

- click the icon on the lateral bar to access the operation selection screen (Fig 257).

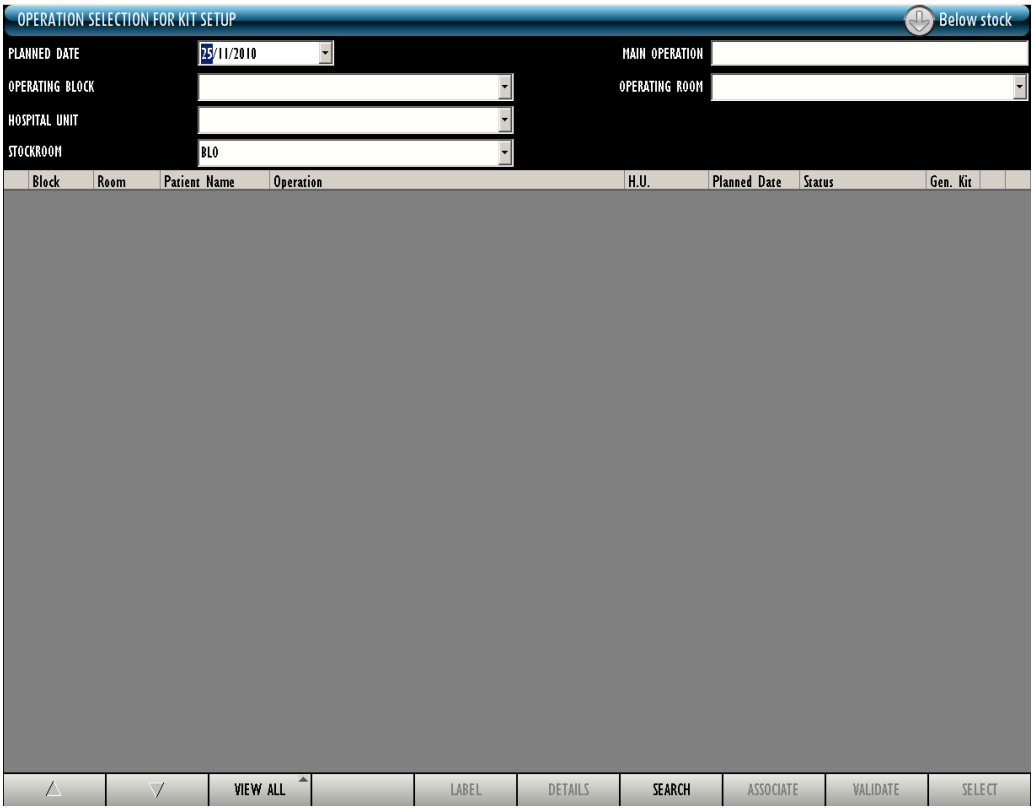


Fig 257

This screen and the relating procedures are described in paragraph 14.

- Use the search filters to search the operation that must be associated to the kit.

The row corresponding to the wanted operation is displayed. In the example shown in Fig 258 it is an “Addominoplastica” operation.

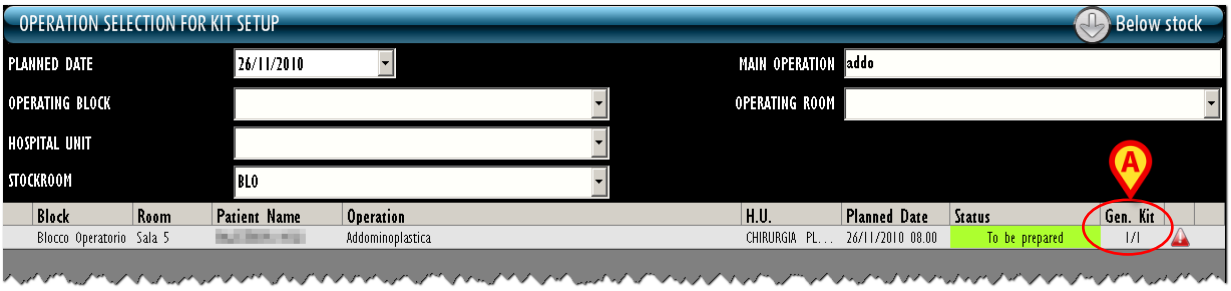


Fig 258

The cell indicated in Fig 258 **A** and enlarged in Fig 259 displays the quantity of generic kits available for the operation. In the example there is 1 kit available on 1 necessary (1/1).

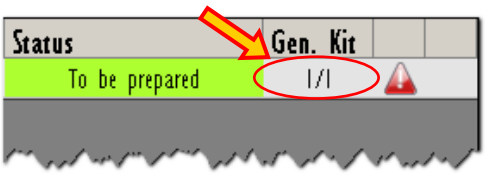


Fig 259

- Click the row corresponding to the operation to which the generic kit must be associated.

The operation is this way selected. The ▶ icon appears on the left.

- Click the **Associate** button on the command bar.

The "Kit composition for an operation" screen opens (Fig 260). This screen's features and procedures are described in paragraph 14.2 and following paragraphs.

Fig 260

For each kit the number of compatible generic kits is indicated (Fig 260 **A**).

- Click the **Associate** button to associate the kit to the selected operation (Fig 260 **B**).

The screen changes in the following way (Fig 261).

Fig 261

- Click the **Continue** button on the command bar (Fig 261 **A**).

A print report containing the list of items to be picked is created. A print preview is displayed (Fig 262). The report can be used to actually pick the resources.

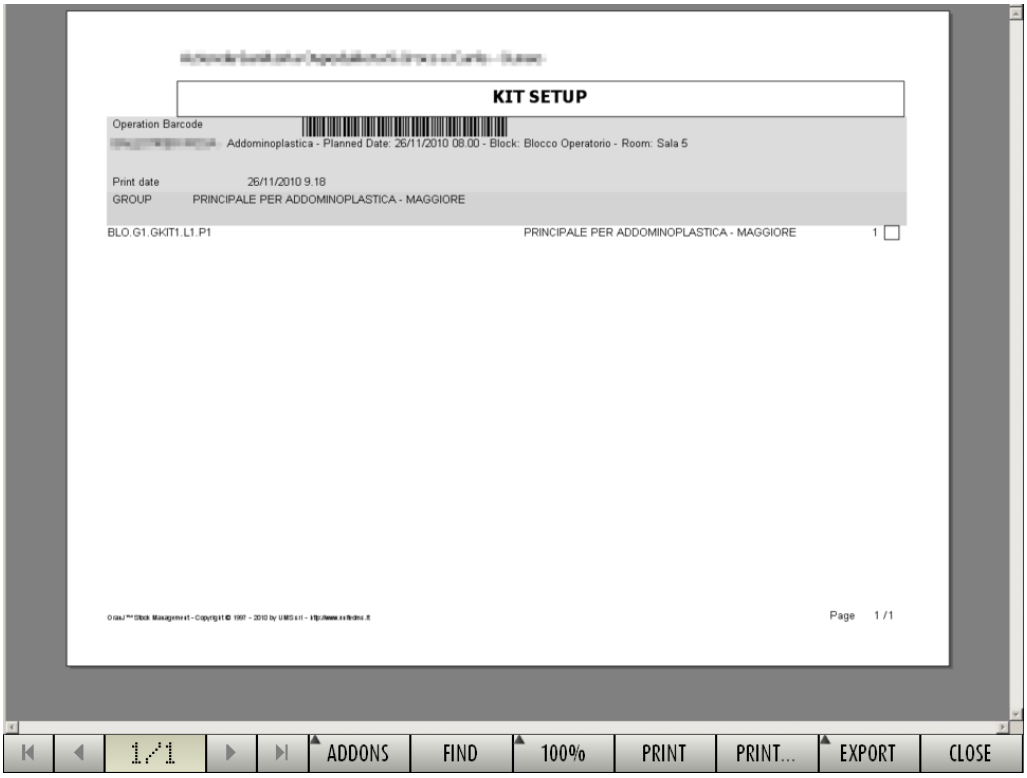


Fig 262

- Close the print preview.

The “Kit creation for an operation” screen is displayed (Fig 263). This screen’s features and functionalities are described in paragraph 14.2 and following paragraphs.

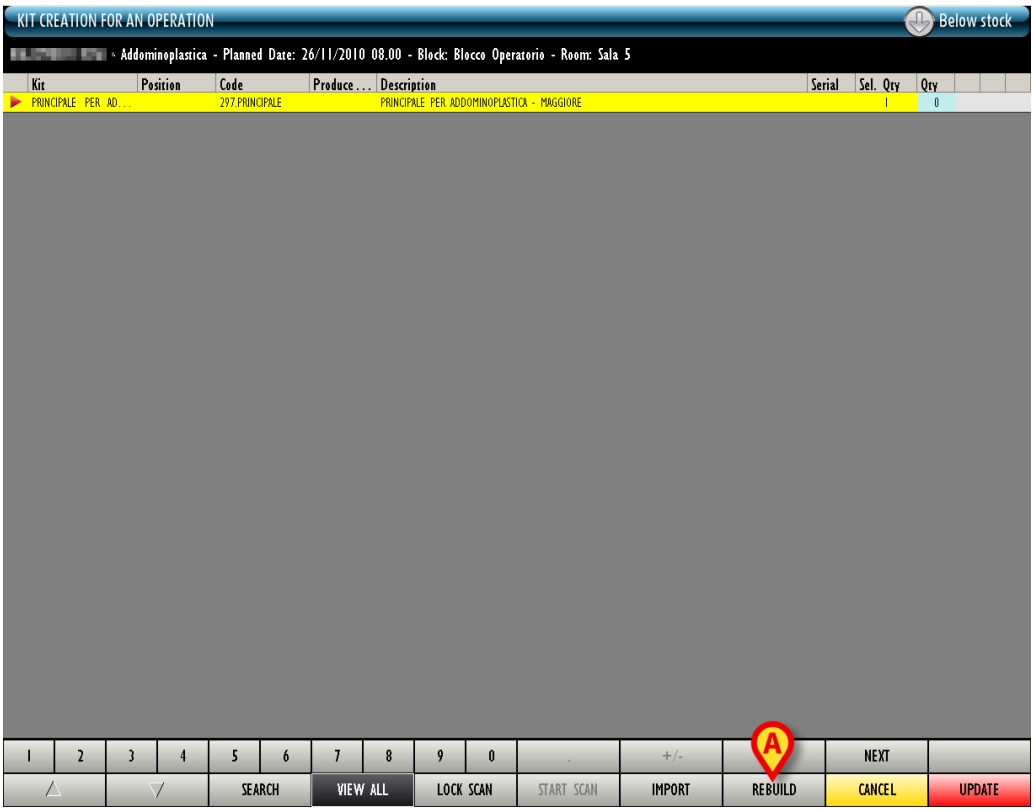


Fig 263

- Specify, where required, all the data relating to the kit to be picked: the quantity, the serial number, the position of each kit (Fig 264).

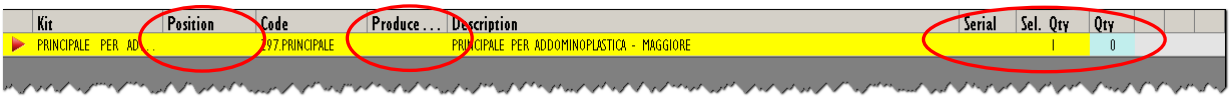


Fig 264

- Click the **Update** button on the command bar.

If necessary, the kit can be rebuilt by specifying the resources again. Use for this purpose the **Rebuild** button on the command bar (Fig 263 **A**). The resources specification procedure (described in paragraph 14.6) is this way activated again.

A pop-up window appears, requiring to specify the number of labels to be printed.

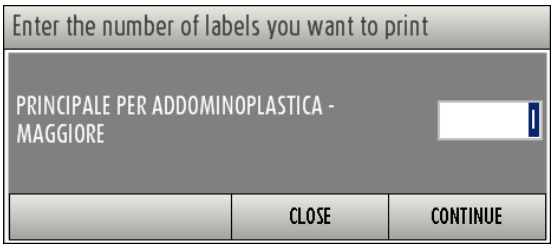


Fig 265

After specification,

- click the **Continue** button.

The labels are now printed. The print report accompanying the kit is created. A print preview is displayed (Fig 266).

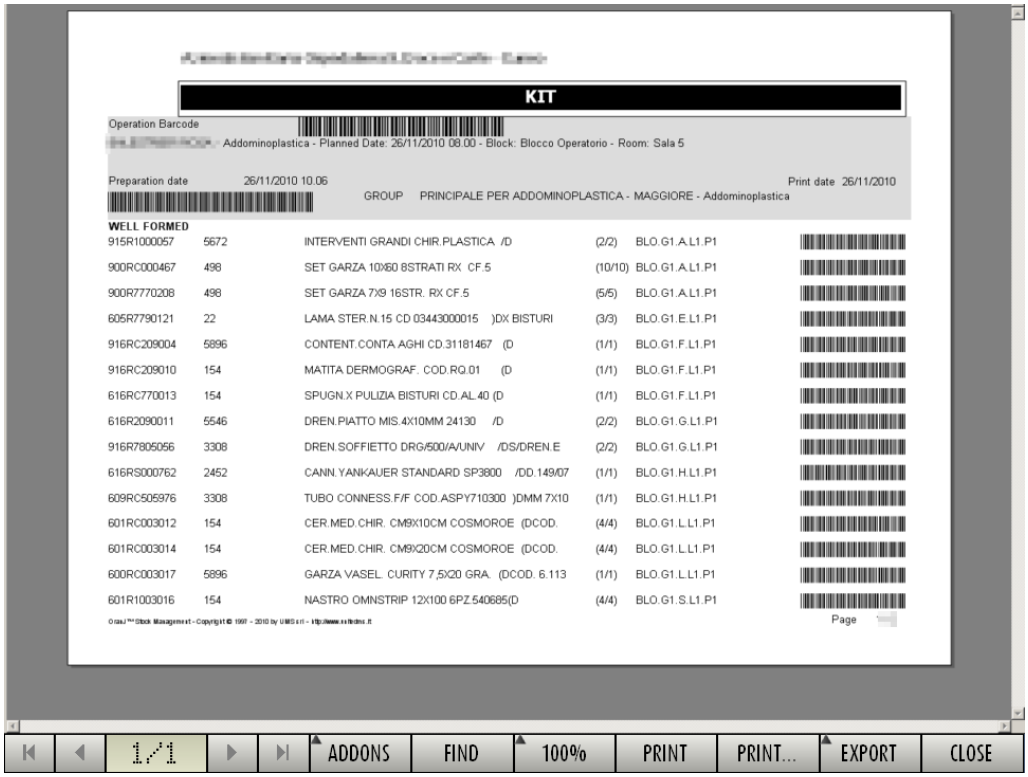


Fig 266

- Close the print preview.

The generic kit association procedure is this way completed. The “Operation selection for kit setup” screen is displayed again (Fig 267).

The state of the operation for which the association procedure was performed is now “Prepared” (Fig 267 **A**).

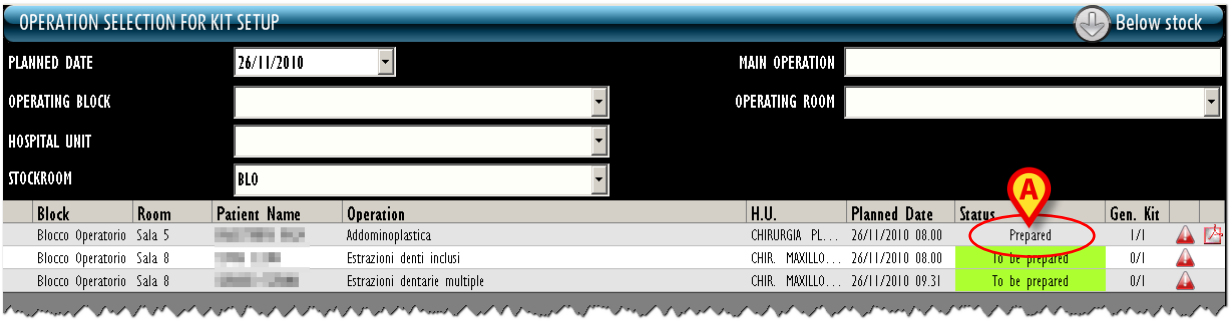


Fig 267

18. Generic kit association to an emergency operation

A specific procedure makes it possible to associate a generic kit to an emergency operation.

To activate this procedure,

- click the icon on the lateral bar.

The following screen opens (Fig 268).

Fig 268

The screen is formed of two areas. The upper area is about the patient and operation to which the kit must be associated (Fig 268 **A**). The lower area is about the kit to be associated (Fig 268 **B**).

- Either insert the patient code in the field indicated in Fig 268 **C** or scan the patient barcode.

All the operations existing for the specified patient are displayed (the operations displayed are either in “Ready”, or “In progress”, or “Terminated” status - Fig 269 - see the user manual of the DIGISTAT® OranJ module for the meaning of operation status).

- Click the row corresponding to the operation to which the kit must be associated.

The operation is this way selected. The ▶ icon appears on the left (Fig 269).

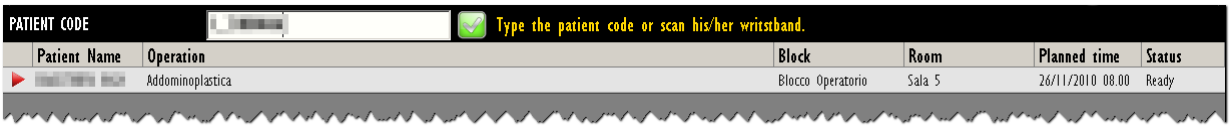


Fig 269

- Insert, in the field indicated in Fig 268 **D**, the serial number of the generic kit that must be associated to the operation. Otherwise scan the kit's barcode.

- Click the ADD KIT button (Fig 270 **A**).

A row corresponding to the kit to be associated is displayed (Fig 270 **B**).

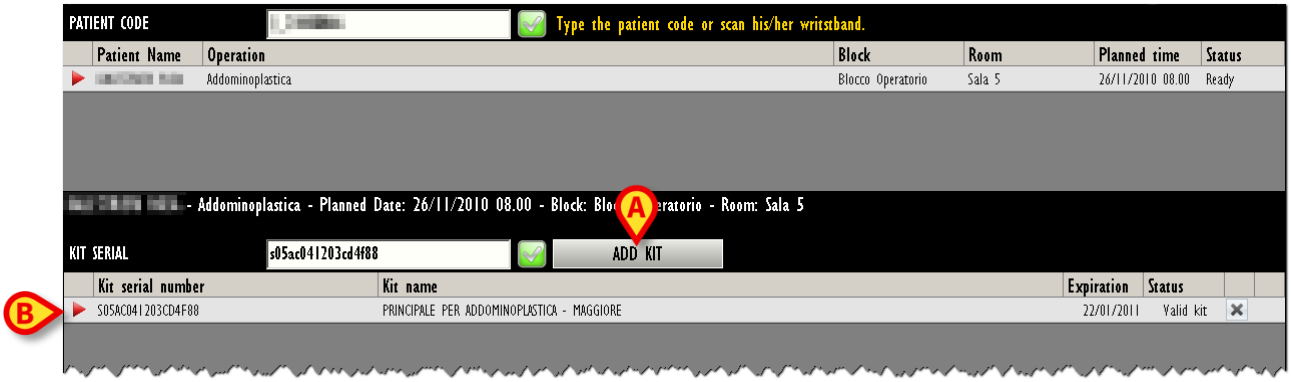


Fig 270

- Click the **Update** button on the command bar.

The generic kit is this way associated to the operation. A print report is created, summarizing the performed procedure's main data.

19. Materials requests management

A specific module makes it possible to manage the materials requests.

To access this module

- click the

icon on the lateral bar.

The following screen opens (Fig 271)

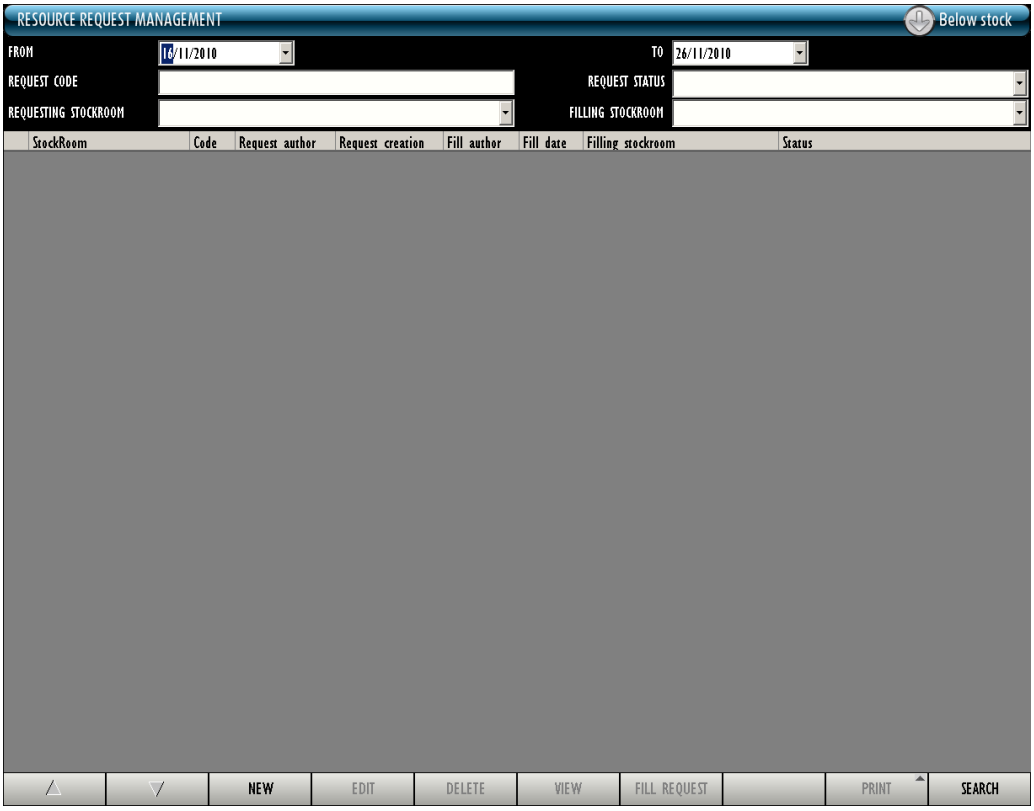


Fig 271 - Materials requests management

The “materials request” procedure activates when one of the stockrooms configured in the system needs a certain resource and requests it to another stockroom.

19.1. “Requests management” - Screen structure

The “Requests management” screen is structured according to the general description offered in paragraph 1.4, see this paragraph for the screen general features. The present paragraph describes the screen specific features.

19.1.1. Filters

Fig 272 - Filters on the "Requests management screen"

The filters available on the "Requests management screen" (Fig 272) are:

- "Start date" ("From" field) and "End date" ("To" field) - these fields make it possible to specify a relevant period. The requests displayed in the data area (see paragraph 19.1.2) all refer to the time span here specified.
- "Request code" - It makes it possible to specify the code of the request that must be displayed.
- "Request status" - It makes it possible to display only the requests that are in a certain status.
- "Requesting stockroom" - It makes it possible to indicate the requesting stockroom.
- "Filling stockroom" - It makes it possible to indicate the filling stockroom.

See paragraph 1.4.2 for instructions on how the filters work.

19.1.2. Data area

The data area contains a list of requests matching the values specified in the filters.

To display the requests list,

- specify the filter values (Fig 273 **A**).
- Click the **Search** button on the command bar (Fig 273 **B**).

The list of requests is this way displayed (Fig 273 **C**).

StockRoom	Code	Request author	Request creation	Fill author	Fill date	Filling stockroom	Status
RBL	2010-00001	ADM	04/11/2010			BLO	To be filled
DEA	2010-00002	IGR	04/11/2010			BLO	In progress
RBL	2010-00003	IGR	04/11/2010			BLO	To be filled
DEA	2010-00004	IGR	04/11/2010	IGR	04/11/2010	RBL	Filled
DEA	2010-00005	ADM	04/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00006	ADM	04/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00008	ADM	04/11/2010	ADM	04/11/2010	RBC	Filled
RBL	2010-00009	ADM	04/11/2010			DEA	To be filled
BLO	2010-00010	ADM	08/11/2010			RBL	In progress
DEA	2010-00011	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00012	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00013	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00014	ADM	09/11/2010			BLO	In progress
DEA	2010-00015	ADM	09/11/2010			BLO	In progress
DEA	2010-00016	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00017	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00018	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00019	ADM	09/11/2010			BLO	To be filled

Fig 273 - Requests list

Each row on the table corresponds to a request. For each request the following information can be specified:

- the requesting stockroom;
- the request code;
- the acronym of the user who recorded the request;
- the request creation date;
- the acronym of the user who filled the request;
- the filling stockroom;
- the fill date;
- the request status.

There are 3 possible statuses for a request:

- to be filled;
- in progress;
- filled.

No information can be edited on this screen. The icon indicates the selected request.

19.1.3. The command bar

This paragraph explains the functionalities relating to the different buttons on the command bar (Fig 274).

Fig 274 - Command Bar

Use the arrow buttons and to scroll up and down the screen contents in case the items are too many to be displayed all at the same time.

Use the **New** button to create a new request (see paragraph 19.2 for the detailed procedure).

Use the **Edit** button to edit a selected request (see paragraph 19.3 for the detailed procedure).

Use the **Delete** button to delete a selected request (see paragraph 19.4).

Use the **View** button to display the details of a selected request (see paragraph 19.5).

Use the **Fill Request** button to activate the request filling procedure (described in paragraph 19.6).

The **Print** button opens a menu making it possible to create two kinds of print reports (Fig 275).

Fig 275

The “Print requests” option creates a record containing the list of all the existing requests.
The “Print selected request” option creates a print report containing the details of a selected request.

Use the **Search** button to display the list of requests whose features match the values specified in the search filters (see paragraph 19.1.2).

19.2. How to create a new request

To create a new request

- click the **New** button on the command bar.

The following screen opens (“Resource request creation” - Fig 276).

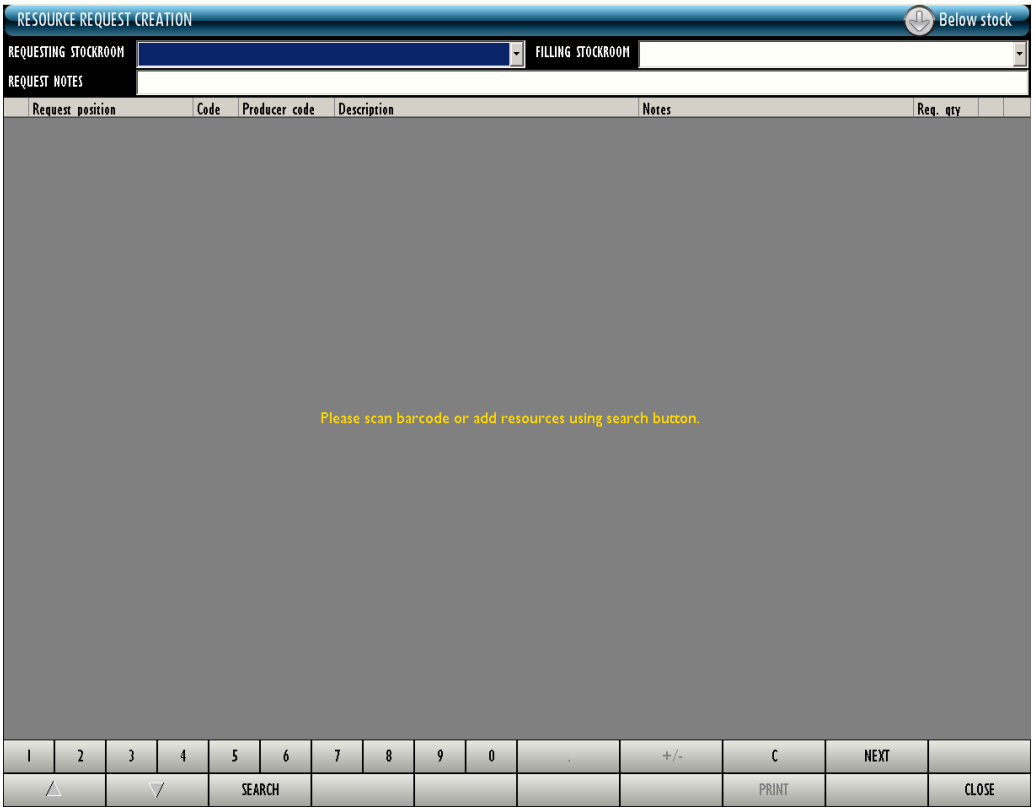


Fig 276

- Specify the requesting and filling stockrooms in the fields shown in Fig 277.
- Insert, if necessary, request notes in the “Request notes” field (free text field).

Fig 277

- Insert the resources to be requested.

The resources can be inserted either by barcode scan or manually (i.e. activating the system’s search functionalities by clicking the **Search** button on the command bar).
The manual resource search and selection procedure is described in paragraph 22.

The list of resources is displayed (Fig 278).

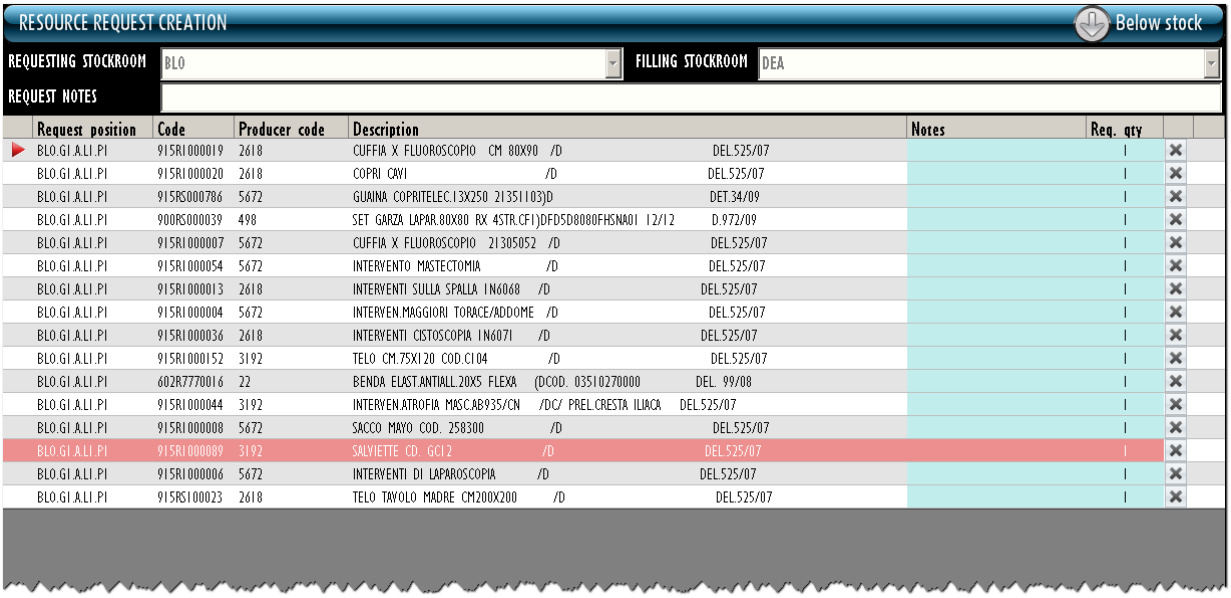


Fig 278 - Requested resources list

- Specify the quantity of each requested resource in the celle indicated in Fig 279 **B** (default quantity is 1).

It is possible to insert, if necessary, a specific note for each resource (Fig 279 **A**).

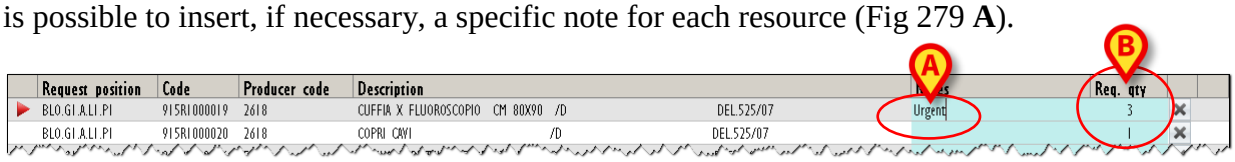


Fig 279

The icon indicates the selected resource.

The icon placed on the right of each row can be clicked to delete the corresponding resource.

The cancelled resources appear as shown in Fig 280. The icon appearing at the end of the cancelled row can be clicked to restore the resource (it is an "Undo" button).

Fig 280 - Cancelled resource

The rows highlighted pink (Fig 281) correspond to resources that are not available in the filling stockroom. The request can be created anyway, even though some resources are unavailable.

Fig 281 - Unavailable resource

When the resources list is complete,

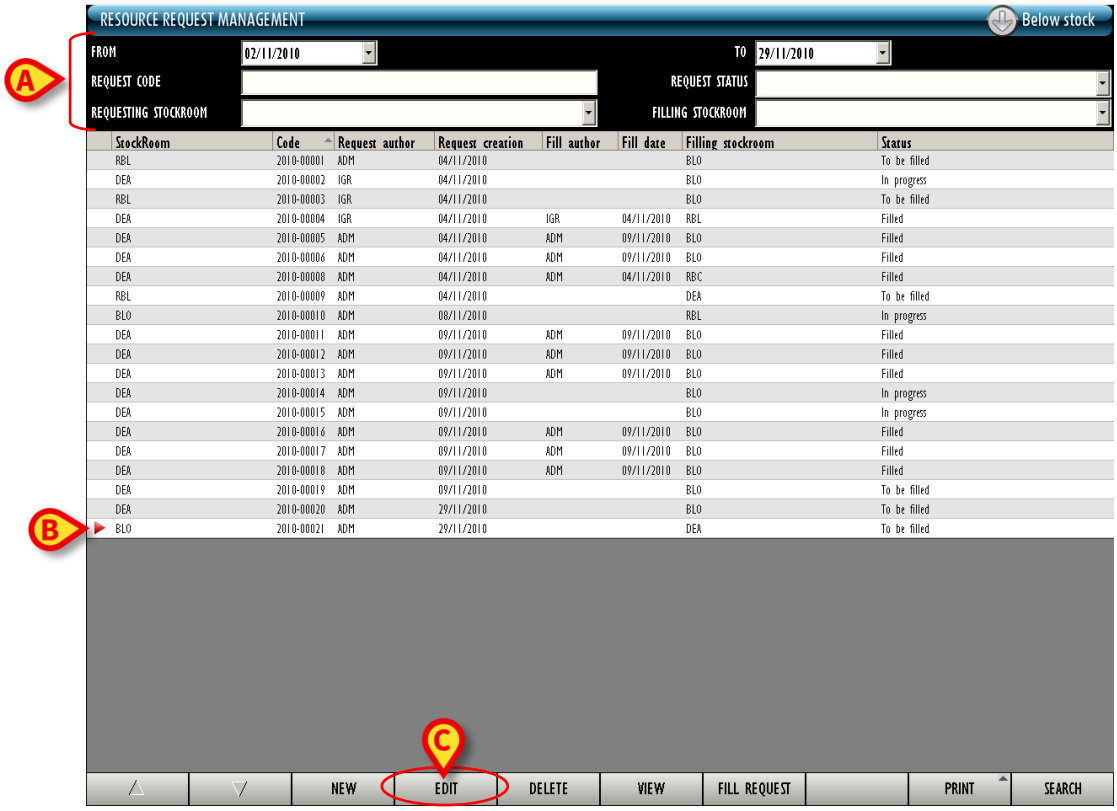
- Click the **Update** button on the command bar.

The request is this way created. A new row, corresponding to the new request, is displayed on the materials requests management screen.

19.3. How to edit an existing request

To edit an existing request

- use the filters on the “Requests management” screen (Fig 282 **A**) to display the row corresponding to the request that must be edited.



StockRoom	Code	Request author	Request creation	Fill author	Fill date	Filling stockroom	Status
RBL	2010-00001	ADM	04/11/2010			BLO	To be filled
DEA	2010-00002	IGR	04/11/2010			BLO	In progress
RBL	2010-00003	IGR	04/11/2010			BLO	To be filled
DEA	2010-00004	IGR	04/11/2010	IGR	04/11/2010	RBL	Filled
DEA	2010-00005	ADM	04/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00006	ADM	04/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00008	ADM	04/11/2010	ADM	04/11/2010	RBC	Filled
RBL	2010-00009	ADM	04/11/2010			DEA	To be filled
BLO	2010-00010	ADM	08/11/2010			RBL	In progress
DEA	2010-00011	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00012	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00013	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00014	ADM	09/11/2010			BLO	In progress
DEA	2010-00015	ADM	09/11/2010			BLO	In progress
DEA	2010-00016	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00017	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00018	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00019	ADM	09/11/2010			BLO	To be filled
DEA	2010-00020	ADM	29/11/2010			BLO	To be filled
BLO	2010-00021	ADM	29/11/2010			DEA	To be filled

Fig 282 - Requests management

- Click the relevant row.

The icon appears at the beginning of the row (Fig 282 **B**).

- Click the **Edit** button on the command bar (Fig 282 **C**).

The **Edit** button is enabled only if the request is in “To be filled” status and the user performing the procedure has the adequate permissions.

The list of requested resources is displayed (Fig 283).

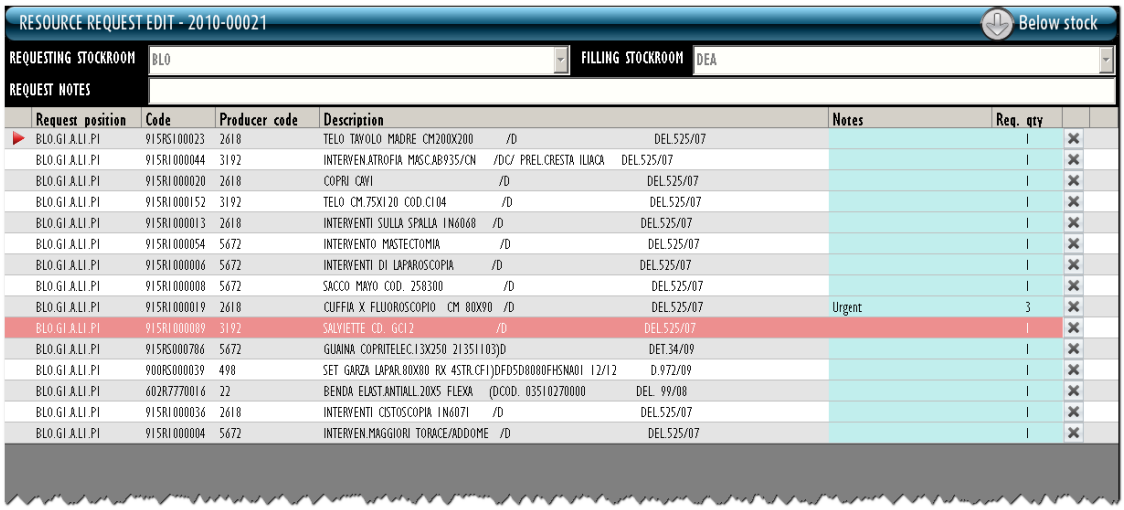


Fig 283

- Edit the request (the quantities can be changed, for instance, resources can be either added or removed).

- Click the **Update** button on the command bar.

19.4. How to delete an existing request

To delete an existing request

- use the filters on the "Requests management" screen (Fig 284 **A**) to display the row corresponding to the request that must be deleted.

Fig 284 - Gestione richieste

- Click the relevant row.

The icon appears at the beginning of the row (Fig 284 **B**).

Click the **Delete** button on the command bar (Fig 284 **C**). The **Delete** button is enabled only if the request is in “To be filled” status and the user performing the procedure has the adequate permissions.

A confirmation is required (Fig 285).

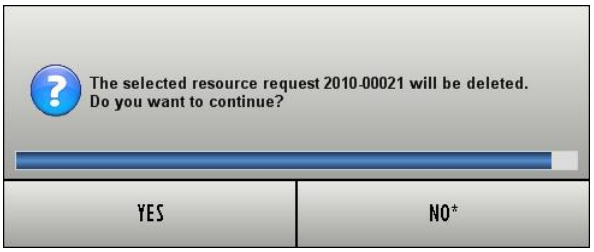


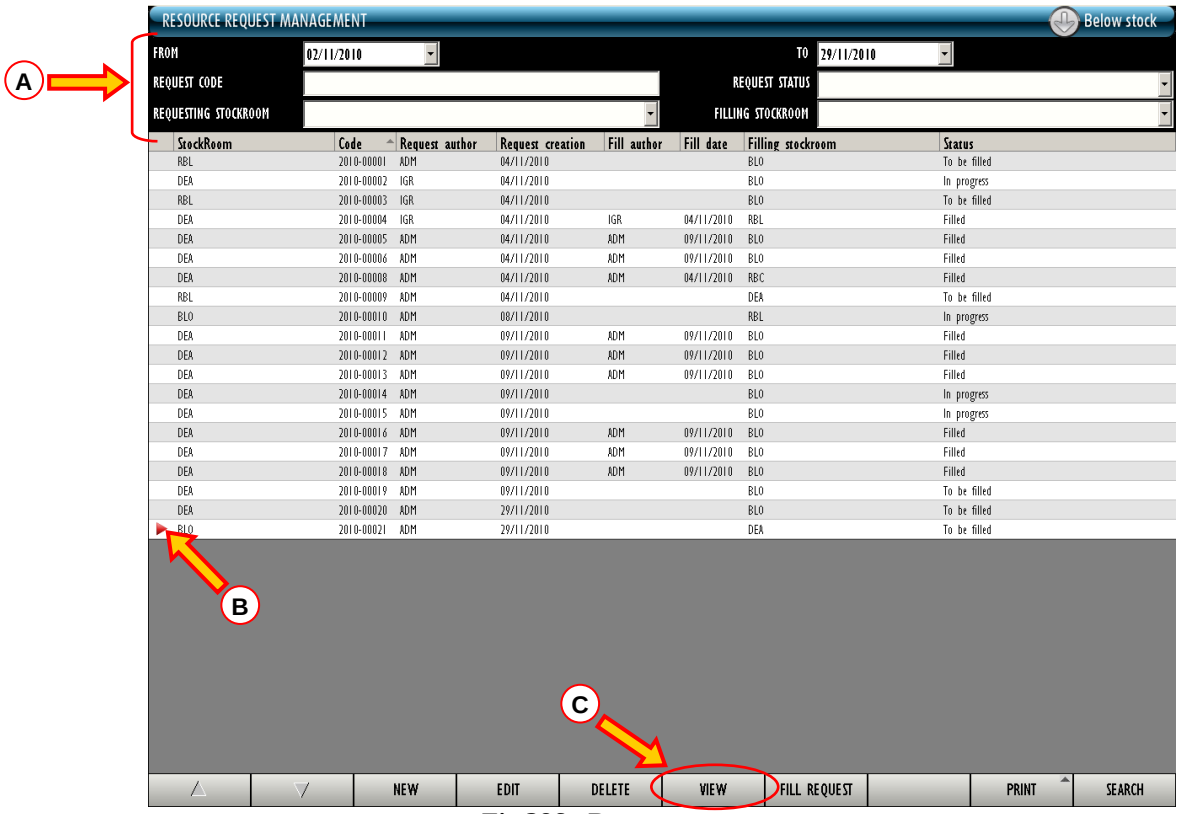
Fig 285

- Click YES to delete the request.

19.5. How to display the deatils of a request

To display the list of resources that are part of a request

- use the filters on the "Requests management" screen (Fig 286 **A**) to display the row corresponding to the request whose details must be displayed.



StockRoom	Code	Request author	Request creation	Fill author	Fill date	Filling stockroom	Status
RBL	2010-00001	ADM	04/11/2010			BLO	To be filled
DEA	2010-00002	IGR	04/11/2010			BLO	In progress
RBL	2010-00003	IGR	04/11/2010			BLO	To be filled
DEA	2010-00004	IGR	04/11/2010	IGR	04/11/2010	RBL	Filled
DEA	2010-00005	ADM	04/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00006	ADM	04/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00008	ADM	04/11/2010	ADM	04/11/2010	RBC	Filled
RBL	2010-00009	ADM	04/11/2010			DEA	To be filled
BLO	2010-00010	ADM	08/11/2010			RBL	In progress
DEA	2010-00011	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00012	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00013	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00014	ADM	09/11/2010			BLO	In progress
DEA	2010-00015	ADM	09/11/2010			BLO	In progress
DEA	2010-00016	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00017	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00018	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00019	ADM	09/11/2010			BLO	To be filled
DEA	2010-00020	ADM	29/11/2010			BLO	To be filled
BLO	2010-00021	ADM	29/11/2010			DEA	To be filled

Fig 286 - Requests management

- Click the row.

The icon appears at the beginning of the selected row (Fig 286 **B**).

- Click the VIEW button on the command bar (Fig 286 **C**).

The list of requested resources is displayed. The list is in "read-only" mode, i.e. it cannot be edited by the user.

19.6. How to fill a request

To fill one of the requests that are either in "To be filled" or "In progress" status,

- use the filters on the "Requests management" screen (Fig 287 **A**) to display the row corresponding to the request whose details must be filled.

StockRoom	Code	Request author	Request creation	Fill author	Fill date	Filling stockroom	Status
RBL	2010-00001	ADM	04/11/2010			BLO	To be filled
DEA	2010-00002	IGR	04/11/2010			BLO	In progress
RBL	2010-00003	IGR	04/11/2010			BLO	To be filled
DEA	2010-00004	IGR	04/11/2010	IGR	04/11/2010	RBL	Filled
DEA	2010-00005	ADM	04/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00006	ADM	04/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00008	ADM	04/11/2010	ADM	04/11/2010	RBC	Filled
RBL	2010-00009	ADM	04/11/2010			DEA	To be filled
BLO	2010-00010	ADM	08/11/2010			RBL	In progress
DEA	2010-00011	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00012	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00013	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00014	ADM	09/11/2010			BLO	In progress
DEA	2010-00015	ADM	09/11/2010			BLO	In progress
DEA	2010-00016	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00017	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00018	ADM	09/11/2010	ADM	09/11/2010	BLO	Filled
DEA	2010-00019	ADM	09/11/2010			BLO	To be filled
DEA	2010-00020	ADM	29/11/2010			BLO	To be filled
BLO	2010-00021	ADM	29/11/2010			DEA	To be filled

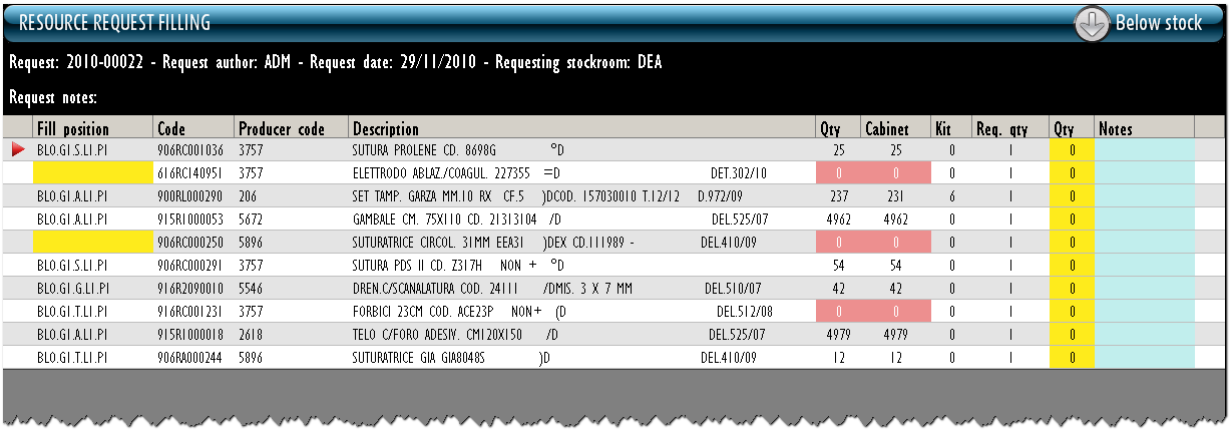
Fig 287 - Requests management

- Click the relevant row.

The icon appears on the left (Fig 287 **B**).

- Click the **Fill Request** button on the command bar (Fig 287 **C**).

The following screen opens (Fig 288 - "Resource request filling").



Fill position	Code	Producer code	Description	Qty	Cabinet	Kit	Req. qty	Qty	Notes
BLO.GI.S.LI.PI	906RC001036	3757	SUTURA PROLENE CD. 8698G °D	25	25	0	1	0	
	616RCI40951	3757	ELETTRODO ABLAZ./COAGUL. 227355 =D DET.302/10	0	0	0	1	0	
BLO.GI.A.LI.PI	900RL000290	206	SET TAMP. GARZA MM.10 RX CF.5)DCOD. 157030010 T.12/12 D.972/09	237	231	6	1	0	
BLO.GI.A.LI.PI	915RI000053	5672	GAMBALE CM. 75X110 CD. 21313104 /D DEL.525/07	4962	4962	0	1	0	
	906RC000250	5896	SUTURATRICE CIRCOL. 31MM EEA31)DEX CD.111989 - DEL.410/09	0	0	0	1	0	
BLO.GI.S.LI.PI	906RC000291	3757	SUTURA PDS II CD. Z317H NON + °D	54	54	0	1	0	
BLO.GI.G.LI.PI	916R2090010	5546	DREN.C/SCANALATURA COD. 24111 /DMIS. 3 X 7 MM DEL.510/07	42	42	0	1	0	
BLO.GI.T.LI.PI	916RC001231	3757	FORBICI 23CM COD. ACE23P NON+ (D DEL.512/08	0	0	0	1	0	
BLO.GI.A.LI.PI	915RI000018	2618	TELO C/FORO ADESIV. CM120X150 /D DEL.525/07	4979	4979	0	1	0	
BLO.GI.T.LI.PI	906RA000244	5896	SUTURATRICE GIA GIA8048S)D DEL.410/09	12	12	0	1	0	

Fig 288

The resources that are part of the request are listed in a table

The following information can be displayed for each resource:

- fill position (if for a resource different positions are available the user must specify the position from which the resource is picked - in these cases the field is empty and highlighted yellow);

- resource code;
- producer code;
- resource description;
- total available quantity;
- quantity of resource located in the cabinets;
- quantity of resource located in the kits;
- requested quantity;
- filled quantity;
- possible notes.

➢ Specify, in the “Quantity” cell, the quantity of resource provided to fill the request (Fig 289 **A**). When a quantity is specified the cell turns from yellow to light blue.

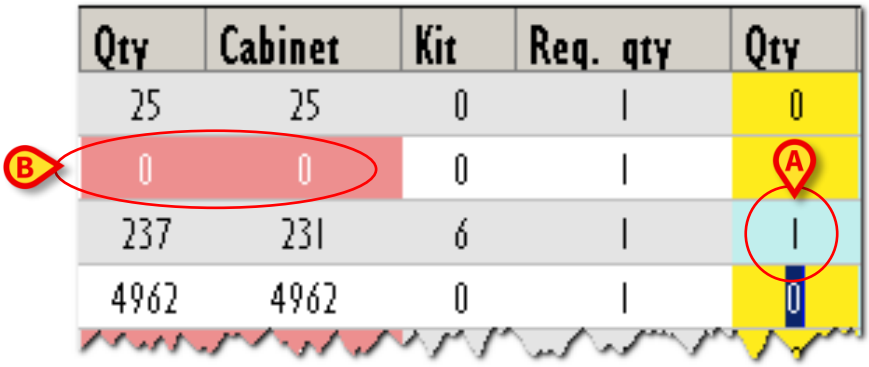


Fig 289

If a resource is unavailable the “Q.ty” and “Cabinet” cells are highlighted red (Fig 289 **B**). It is not possible to specify a quantity for these resources. The request can be filled anyway.

When all the information is specified,

➢ click the **Update** button on the command bar.

The request is this way filled.

20. Resources list for emergencies

The “Emergencies” module makes it possible to quickly display and print the list of resources necessary for an emergency operation.

To access this module,

- click the corresponding icon on the lateral bar.

The following screen opens (Fig 290).

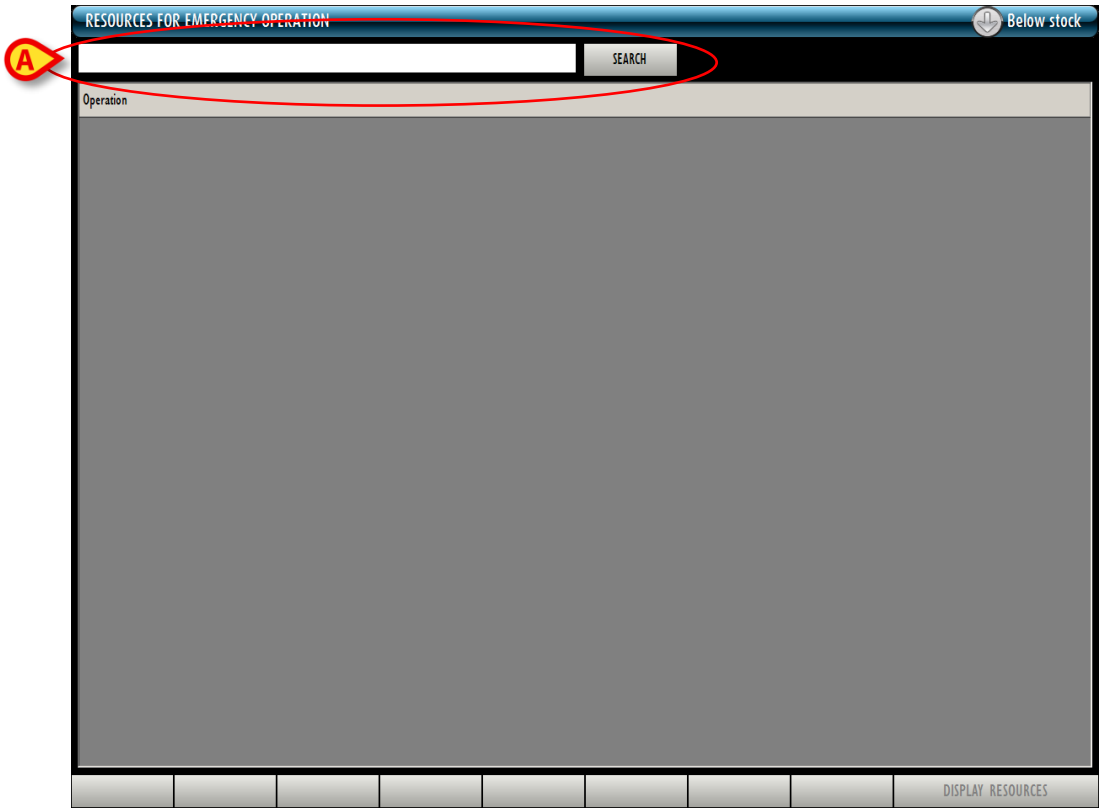


Fig 290 - “Emergencies” module

20.1. How to display the resources list for an operation

The field placed on top, indicated in Fig 290 **A**, makes it possible to search for the operation for which the resources list needs to be displayed.

To search for the operation

- type the operation name (or part of it) in the field indicated in Fig 291 **A**.

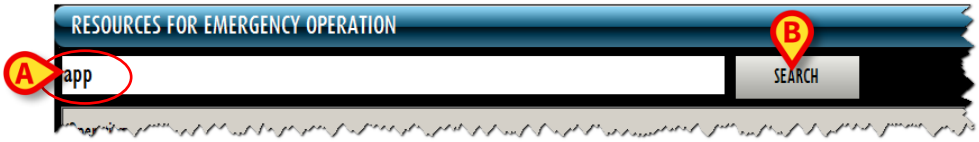


Fig 291

- Click the **Search** button placed alongside the field (Fig 291 **B**).

The list of operations whose name includes the specified text is displayed (Fig 292 **A**).

Fig 292

- Click the name of the relevant operation.

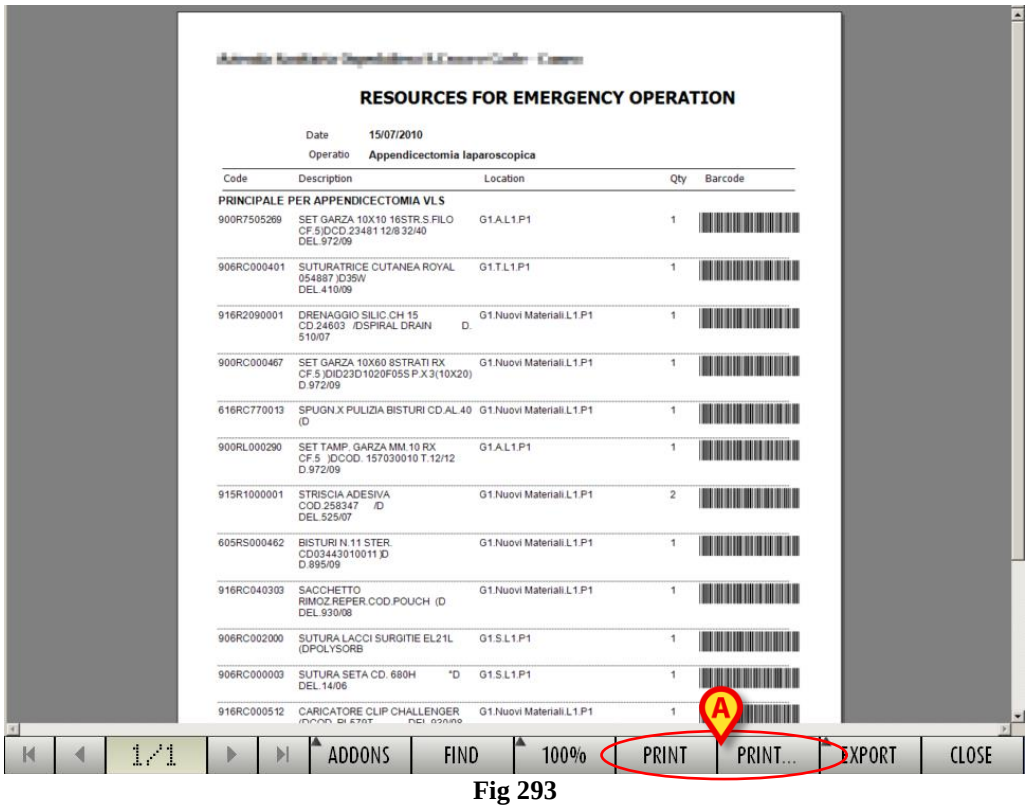
The name appears highlighted (Fig 292 **B**).

- Click the **Display Resources** button on the command bar (Fig 292 **C**).

The document listing all the needed resources is displayed.

Double click the row to display the document directly.

A print preview is displayed (Fig 293).



RESOURCES FOR EMERGENCY OPERATION

Date 15/07/2010

Operatio Appendicectomia laparoscopica

Code	Description	Location	Qty	Barcode
PRINCIPALE PER APPENDICECTOMIA VLS				
900R7505269	SET GARZA 10X10 16STR.S.FILO CF.5)DCD.23481 12/8 32/40 DEL.972/09	G1.A.L1.P1	1	
906RC000401	SUTURATRICE CUTANEA ROYAL 054887)D35/W DEL.410/09	G1.T.L1.P1	1	
916R2090001	DRENAGGIO SILIC.CH 15 CD.24603 /DSPIRAL DRAIN D. 510/07	G1.Nuovi Materiali.L1.P1	1	
900RC000467	SET GARZA 10X60 8STRATI RX CF.5)DID23D1020F05S P.X 3(10X20) D.972/09	G1.Nuovi Materiali.L1.P1	1	
616RC770013	SPUGN.X PULIZIA BISTURI CD.AL.40 (D	G1.Nuovi Materiali.L1.P1	1	
900RL000290	SET TAMP. GARZA MM.10 RX CF.5)DCOD. 157030010 T.12/12 D.972/09	G1.A.L1.P1	1	
915R1000001	STRISCIA ADESIVA COD.258347 /D DEL.525/07	G1.Nuovi Materiali.L1.P1	2	
605RS000462	BISTURI N.11 STER. CD03443010011)D D.895/09	G1.Nuovi Materiali.L1.P1	1	
916RC040303	SACCHETTO RIMOZ.REPER.COD.POUCH (D DEL.930/08	G1.Nuovi Materiali.L1.P1	1	
906RC002000	SUTURA LACCI SURGITIE EL21L (DPOLYSORB	G1.S.L1.P1	1	
906RC000003	SUTURA SETA CD. 680H *D DEL.14/06	G1.S.L1.P1	1	
916RC000512	CARICATORE CLIP CHALLENGER	G1.Nuovi Materiali.L1.P1	1	

Fig 293

- Click the **Print** button on the command bar (Fig 293 **A**) to print the document.

For each resource the following information can be displayed:

- the code;
- the description;
- the location;
- the needed quantity;
- the barcode.

This document can be used to pick the resources from the cabinets.

21. Inventory management

The “Inventory” module makes it possible to manage the inventories, the quantities, the expiration dates and the resources in stock.

Some “Stock Management” configurations do not manage the resouces expiration dates. In these cases no information is displayed in the relating field.

To select the module

- click the corresponding icon .

The following screen opens:

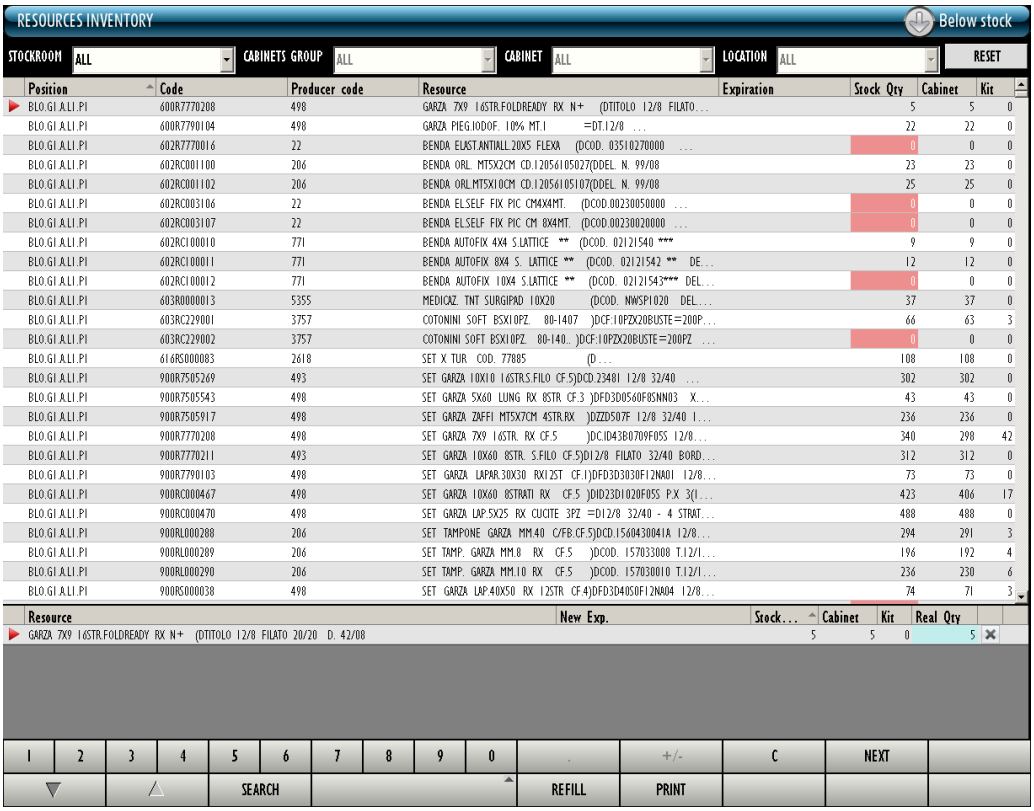


Fig 294 - Inventory

21.1. Inventory: screen structure

The “Inventory” screen is structured according to the general description offered in paragraph 1.4. See that paragraph for the screen general features. This paragraph describes the screen specific features.

21.1.1. Filters

Fig 295 - Filters on the “Inventory” screen

The filters available on the “Inventory” screen (Fig 295) are:

- “Stockroom” - Displays only the resources of a specific stockroom.
- “Cabinet group” - Displays only the resources of a specific cabinet group.
- “Cabinet” - Displays only the resources of a specific cabinet.
- “Location” - Displays only the resources of a specific location.

See paragraph 1.4.2 for instructions on how the filters work.

21.1.2. Data area

The data area of the “Inventory” screen is formed of two parts (Fig 296).

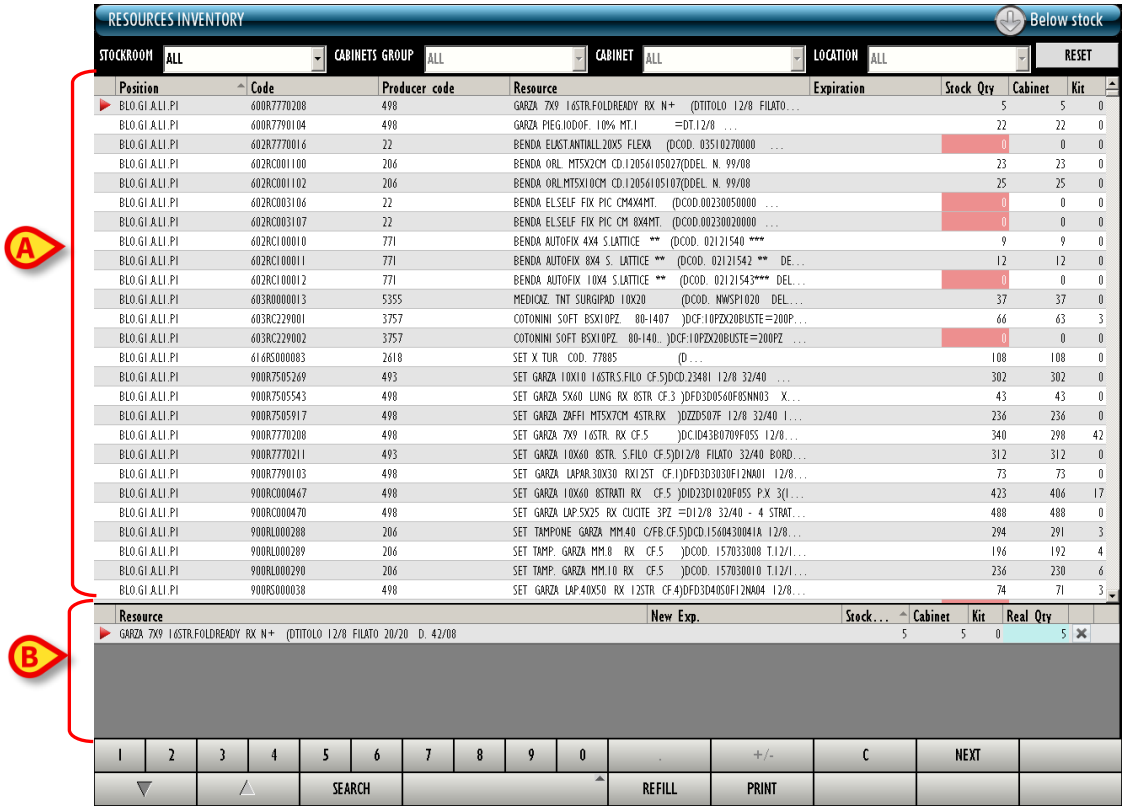


Fig 296 - Inventory

The upper part of the screen lists all the resources that are in the inventory (Fig 296 **A**).
Each row corresponds to a resource type. For each resource the following information can be provided:

- the position (not editable);
- the resource code (not editable);
- the manufacturer code (not editable);
- the resource name (not editable);
- the expiration date (not editable);
- the quantity of resources in stock (not editable);
- the quantity of resource located in the cabinets (not editable);
- the quantity of resource located in the kits (not editable).

The lower part of the screen (Fig 296 **B**) contains detailed information relating to the resource selected in the upper part. Each row corresponds to a single resource (while in the upper part each row corresponds to a resource type).
For each row the following information can be displayed:

- the resource name and description (not editable);
- the possible new expiration date;

Some "Stock Management" configurations do not manage the resouces expiration dates. In these cases no information is displayed in the relating field.

- the total recorded quantity in stock (not editable);
- the recorded quantity of resource located in the cabinets (not editable);
- the recorded quantity of resource located in the kits (not editable).
- the actual quantity in stock.

For each resource either all or part of the information can be displayed, depending on configuration.

The icon on the left indicates the selected resource.

The selection of a row in the upper part of the screen displays the details of the corresponding resource in the lower part of the screen.

When the quantity in stock for a resource is less than the minimum quantity (indicated by configuration) the corresponding cell is highlighted red; when the quantity in stock for a resource is

less than the ideal quantity (indicated by configuration) the corresponding cell is highlighted yellow.

> *If there are 0 items in stock for a resource the selection of the corrsponding row in the upper part of the screen does not display any item in the lower part of the screen.*

In the configurations that manage the expiration dates, if the expiration date is highlighted red it means that the resource is expired. If the expiration date is highlighted yellow it means that the resource is close to expiration.

The icon on the right cancels the corresponding row. The cancelled row appears in strike-through characters, as in Fig 297.

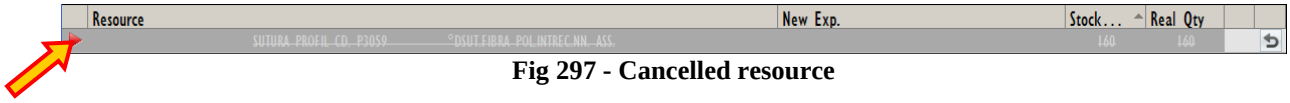


Fig 297 - Cancelled resource

The corresponding resources disappear from the list when the screen is updated.

The icon placed at the end of the row is an "Undo" button bringing back the row to its original state.

The rows highlighted green corespond to resources that are not in use anymore but for which there are still available quantities in stock (Fig 298).

Fig 298

21.1.3. The "Inventory" screen command bar

The command bar of the "Inventory" screen (Fig 299) is formed of several buttons. This paragraph lists briefly the functions of the different buttons, referring to successive paragraphs when more detailed instructions on a specific functionality are necessary.

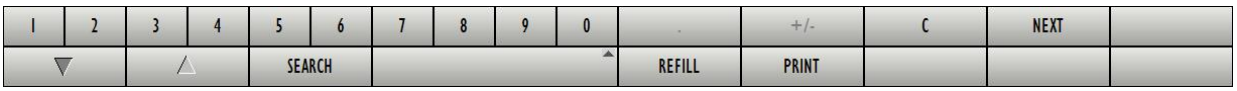


Fig 299 - Command bar

The upper line contains the buttons making it possible to manage the numeric data specification.

Fig 300 - Numeric buttons

Use the numeric buttons (Fig 300) to indicate the quantities. Click one of the numbers to write the number in the "Quantity" field.

The " **.** " button is a decimal divider. The button is active only if decimal specification is relevant.

The “**+/-**” button makes it possible to specify whether a value is negative or positive. The button is active only if negative values specification is relevant.

The “ **C** ” button brings back to zero the specified quantities.

The **Next** button selects the item following the one currently selected.

Use the arrow buttons ▼ and ▲ to scroll up and down the screen contents in case the items are too many to be displayed all together.

Use the **Search** button to access the system’s search functionalities (described in paragraph 22).

Use the **Refill** button to access directly the refill functionalities for the selected resource. See paragraph 21.3 for the detailed procedure.

Use the **Print** button to print the resources inventory. See paragraph 21.4 for the module’s print functionalities.

Use the **Close** button to close the screen.

When editing the screen contents the **Update** and **Cancel** buttons appear on the command bar.

The **Update** button saves the changes made. After every editing of the screen contents it is necessary to click the **Update** button to save the changes.

The **Cancel** button annuls all the changes made.

21.2. Editing the inventory values

The “Inventory” module makes it possible to manage the values relating to the resources recorded. It is possible to change the quantities in stock and the expiartion dates if necessary. It is also possible to delete a resource.
The nature and number of editable values depend on the configuration of the specific resource and are indicated by the light-blue colour highlighting the corresponding cell. In Fig 301, for instance, only the actual quantity is editable.

Fig 301

21.2.1. How to change the quantities in stock

To change the quantity of resource in stock,

- click the row in the upper part of the screen corresponding to the relevant resource.

The row is selected; the icon is displayed on the left (Fig 302 **A**).

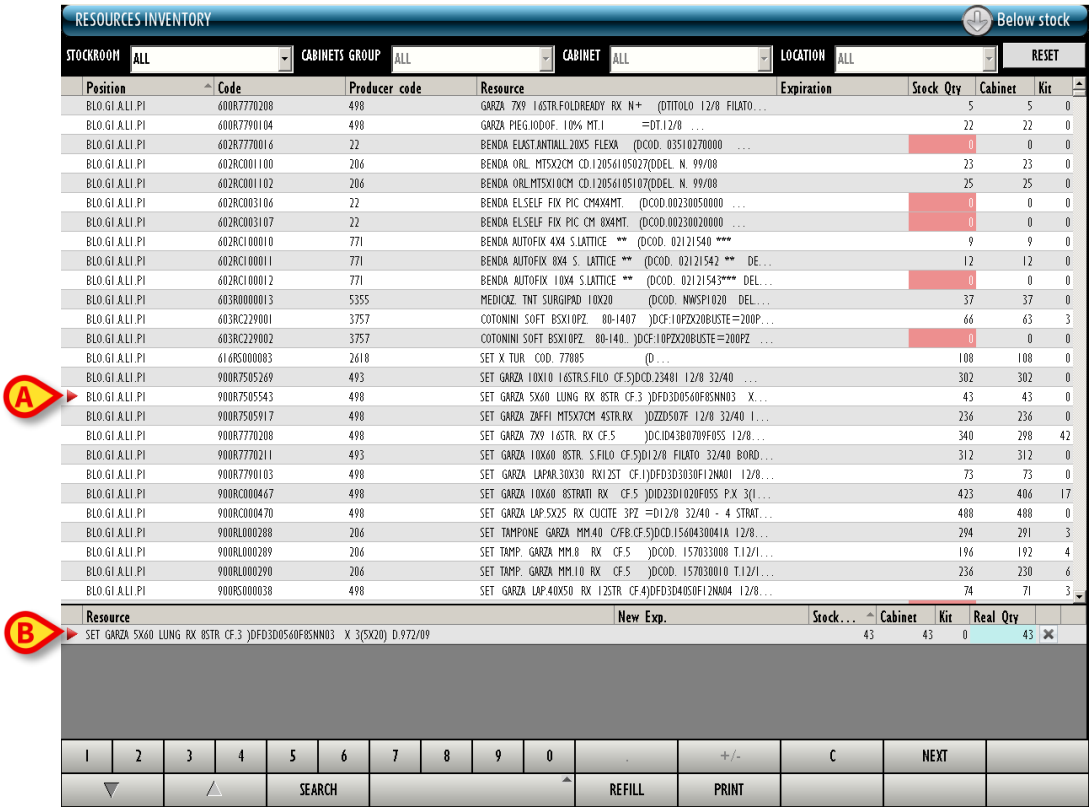


Fig 302

In the lower part of the screen the details of the selected resource are displayed (Fig 302 **B**).

In the lower part of the screen,

- click the row corresponding to the resource for which the quantity must be changed.

The corresponding row is selected; the ▶ icon is displayed on the left.

- Insert the new resource quantity using the numeric buttons on the command bar.
- Click the **Update** button on the command bar.

The quantities in stock are updated.

Otherwise, as alternative procedure,

- click the cell containing the “actual quantity” on the row corresponding to the resource for which the value must be changed.

The corresponding row is selected; the ▶ icon is displayed on the left. The quantity is highlighted.

- Specify the new quantity using either the workstation keyboard or the numeric buttons on the command bar.
- Click the **Update** button on the command bar.

The quantities are this way updated.

The icon makes it possible to go back to the original values (“Undo” button).

21.2.2. Deleting an inventory item

To delete an inventory item, on the upper part of the screen,

- click the row corresponding to the resource that must be deleted.

The resource is selected; the icon appears at the beginning of the row (Fig 303 **A**).

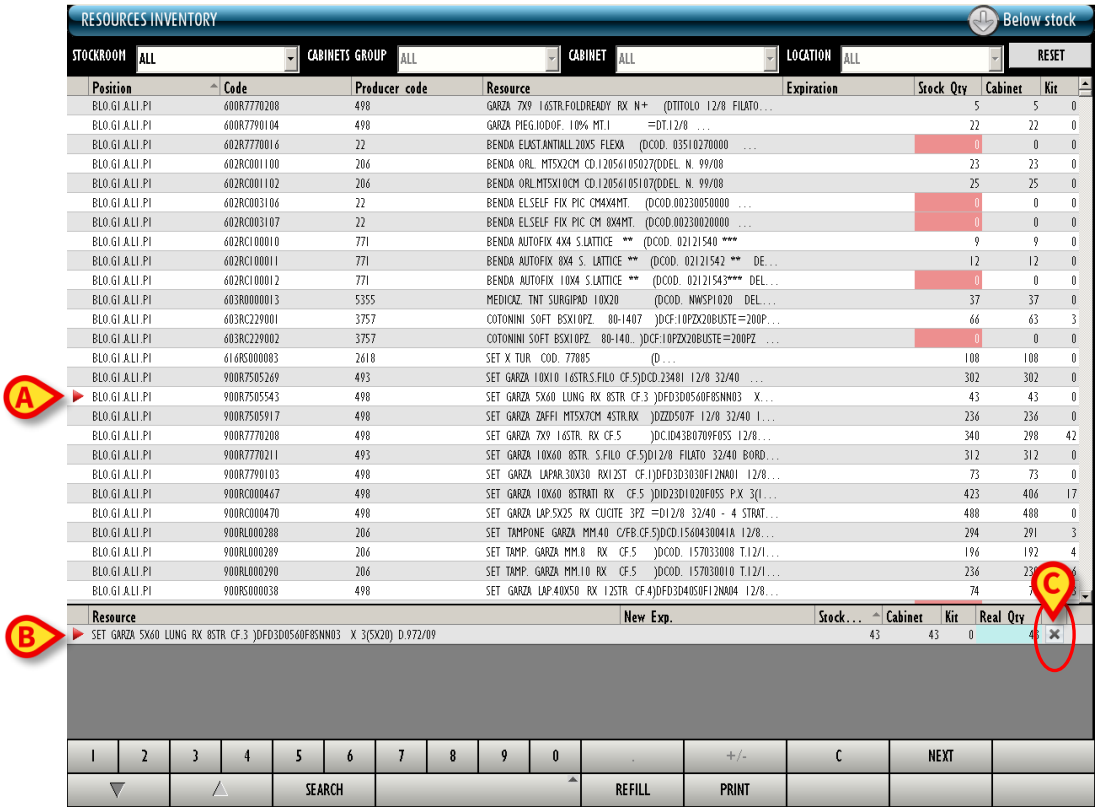


Fig 303

In the lower part of the screen the details of the selected resource appear (Fig 303 **B**).

In the lower part of the screen, on the row corresponding to the resource that must be deleted,

- click the button on the right (Fig 303 **C**).

The row appears now in strike-through characters (Fig 304).

Fig 304

- Click the **Update** button on the command bar.

The row disappears from the lower part of the screen. The inventory values are consequently updated.

If all the items of a certain resource are deleted the row corresponding to the resource disappears from the upper part of the screen as well.

The icon makes it possible to go back to the original values (“Undo” button).

21.3. Refill resource procedure

It is possible to access the refill resource quantity functionalities directly from the inventory screen. It is this way possible to perform the refill procedure for a resource in a direct and quick way.

To do that

- click the row corresponding to the resource for which the refill procedure must be performed.

The resource is selected; the icon appears on the left (Fig 305 **A**).

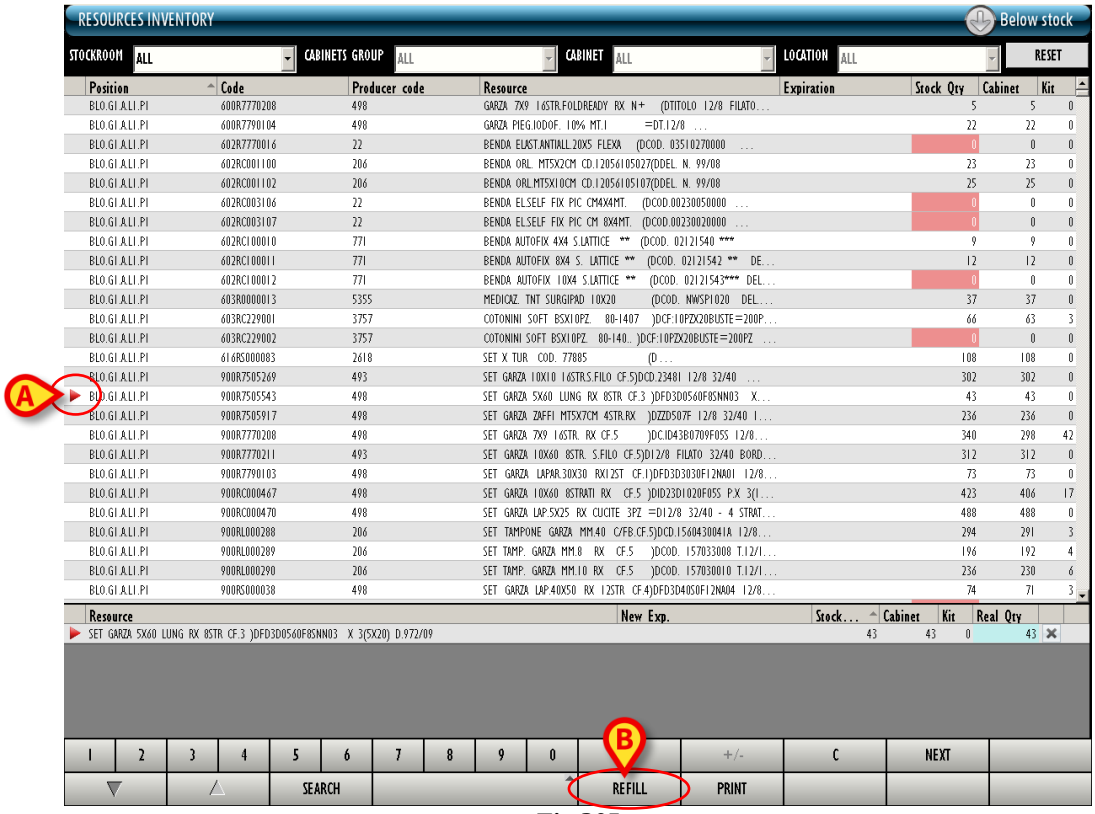


Fig 305

- click the **Refill** button on the command bar (Fig 305 **B**).

The “Resources refill” screen is displayed (Fig 306). The selected resource is displayed on this screen (Fig 306 **A**).

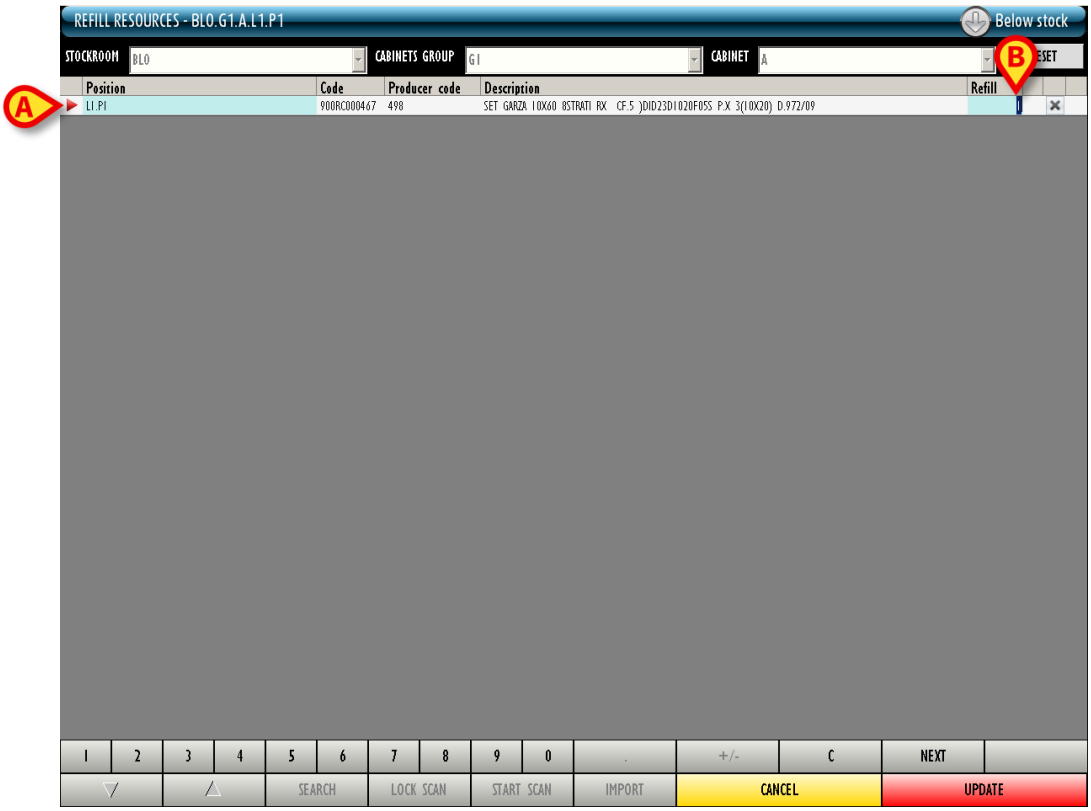


Fig 306

- Specify, if required, the resource values (lot, serial number, etc…).
- Specify the “refill” quantity in the “Refill” field (Fig 306 **B**)
- Click the **Update** button on the command bar.

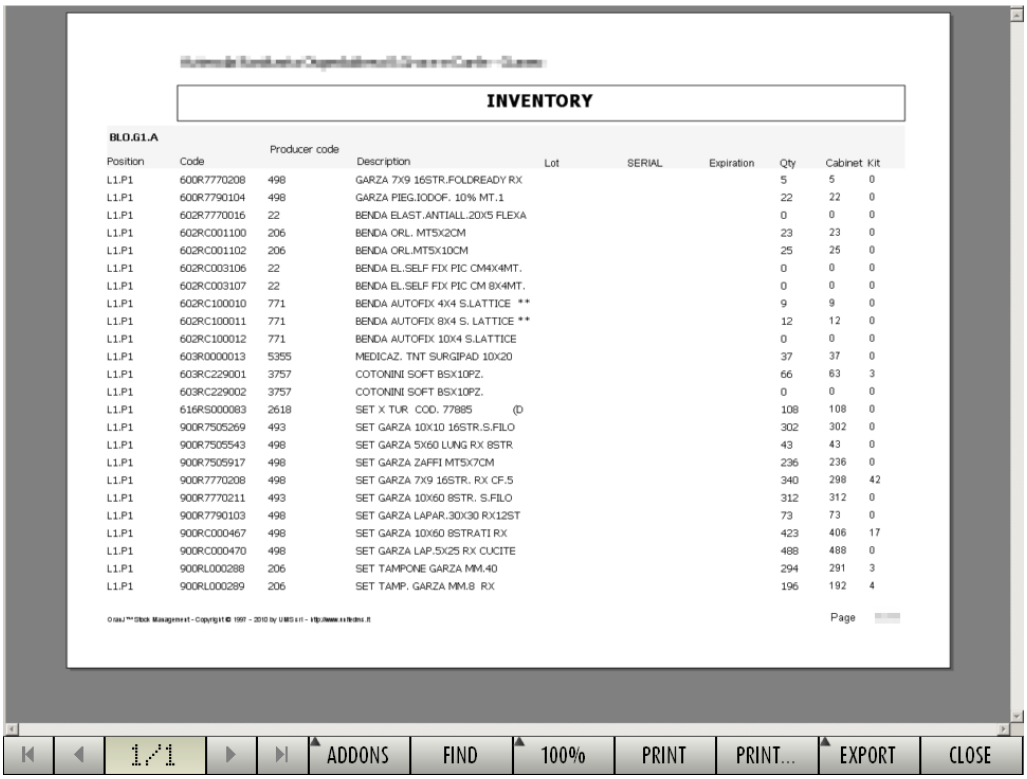
The “Inventory” screen opens again (Fig 305). The resource values are updated.

21.4. Print inventory

The **Print** button on the command bar makes it possible to access the system's print functionalities.

- Click the **Print** button.

A print preview is displayed (Fig 307).



INVENTORY

BLO.G1.A

Position	Code	Producer code	Description	Lot	SERIAL	Expiration	Qty	Cabinet	Kit
L1.P1	600R7770208	498	GARZA 7X9 16STR.FOLDREADY RX				5	5	0
L1.P1	600R7790104	498	GARZA PIEG.IODOF. 10% MT.1				22	22	0
L1.P1	602R7770016	22	BENDA ELAST.ANTIALL.20X5 FLEXA				0	0	0
L1.P1	602RC001100	206	BENDA ORL. MT5X2CM				23	23	0
L1.P1	602RC001102	206	BENDA ORL.MT5X10CM				25	25	0
L1.P1	602RC003106	22	BENDA EL.SELF FIX PIC CM4X4MT.				0	0	0
L1.P1	602RC003107	22	BENDA EL.SELF FIX PIC CM 8X4MT.				0	0	0
L1.P1	602RC100010	771	BENDA AUTOFIX 4X4 S.LATTICE **				9	9	0
L1.P1	602RC100011	771	BENDA AUTOFIX 8X4 S. LATTICE **				12	12	0
L1.P1	602RC100012	771	BENDA AUTOFIX 10X4 S.LATTICE				0	0	0
L1.P1	603R0000013	5355	MEDICAZ. TNT SURGIPAD 10X20				37	37	0
L1.P1	603RC229001	3757	COTONINI SOFT BSX10PZ.				66	63	3
L1.P1	603RC229002	3757	COTONINI SOFT BSX10PZ.				0	0	0
L1.P1	616RS000083	2618	SET X TUR COD. 77885 (D				108	108	0
L1.P1	900R7505269	493	SET GARZA 10X10 16STR.S.FILO				302	302	0
L1.P1	900R7505543	498	SET GARZA 5X60 LUNG RX 8STR				43	43	0
L1.P1	900R7505917	498	SET GARZA ZAFFI MT5X7CM				236	236	0
L1.P1	900R7770208	498	SET GARZA 7X9 16STR. RX CF.5				340	298	42
L1.P1	900R7770211	493	SET GARZA 10X60 8STR. S.FILO				312	312	0
L1.P1	900R7790103	498	SET GARZA LAPAR.30X30 RX12ST				73	73	0
L1.P1	900RC000467	498	SET GARZA 10X60 8STRATI RX				423	406	17
L1.P1	900RC000470	498	SET GARZA LAP.5X25 RX CUCITE				488	488	0
L1.P1	900RL000288	206	SET TAMPONE GARZA MM.40				294	291	3
L1.P1	900RL000289	206	SET TAMP. GARZA MM.8 RX				196	192	4

Page

Fig 307 - Print inventory

22. Search functionalities

A specific tool is available in the “Stock Management” system to search for the resources in stock

To access this tool

- click the corresponding icon on the lateral bar.

The following screen opens (Fig 308)

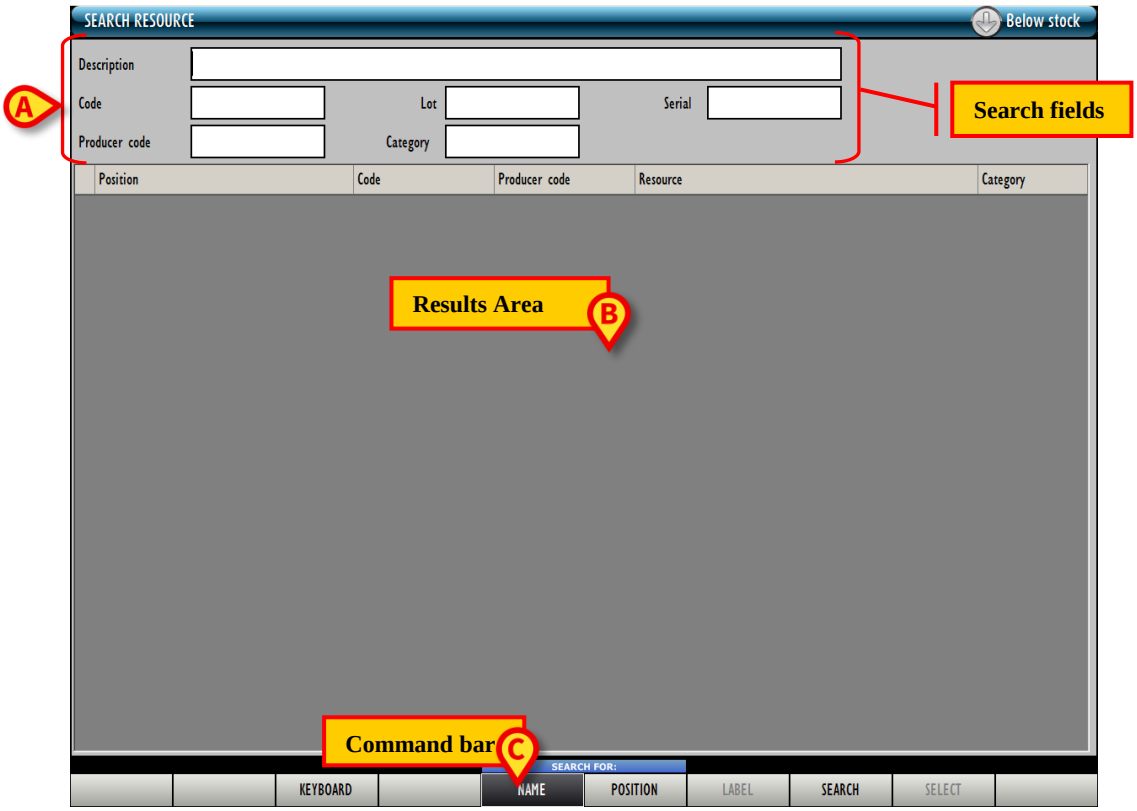


Fig 308 - Search resource

*The screen shown in Fig 308 is displayed every time the **Search** button is clicked on most of the “Stock Management” system screen.*

On top of the screen, in the area indicated in Fig 308 **A** there are the search fields.

The area indicated in Fig 308 **B** contains the search results.

The command bar is indicated in Fig 308 **C**.

22.1. Search fields

In order to search for the wanted resource the following information can be specified in the search fields:

- the resource description;
- the resource code;
- the lot;
- the serial number;
- the manufacturer code;
- the resource category.

22.1.1. How to search for a resource

To search for a resource

➢ insert the available data of the searched resource in the search fields (Fig 309 **A**).

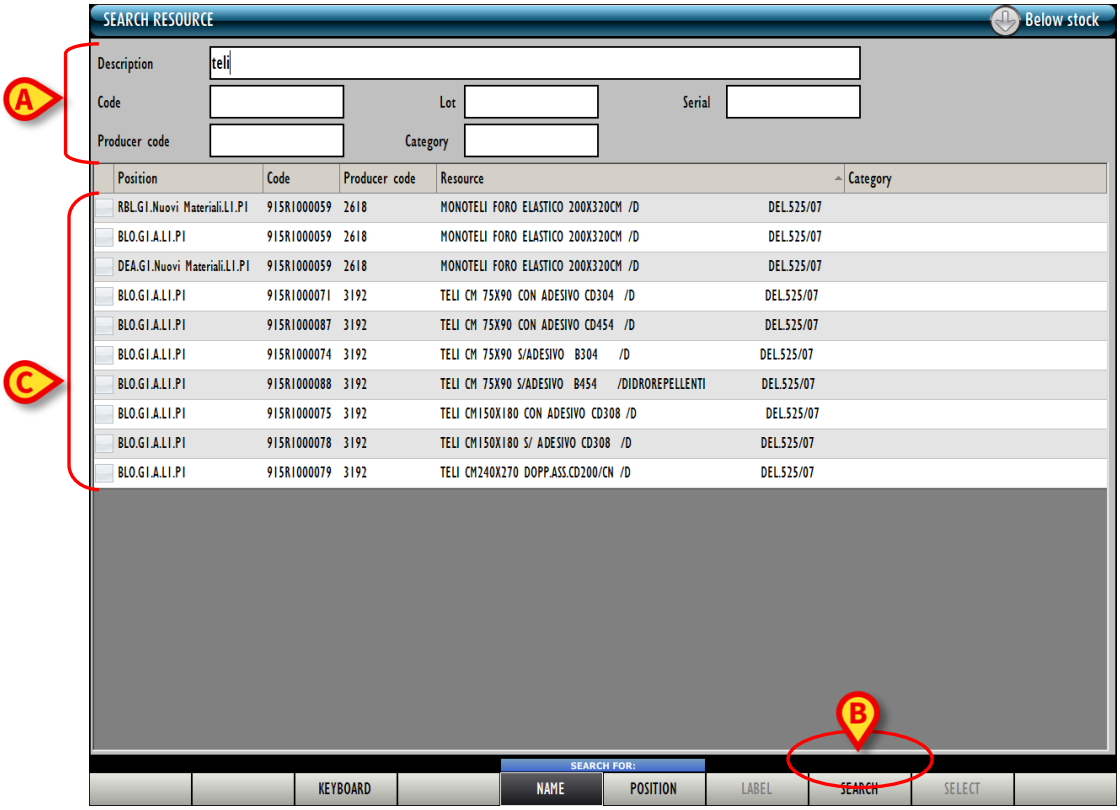


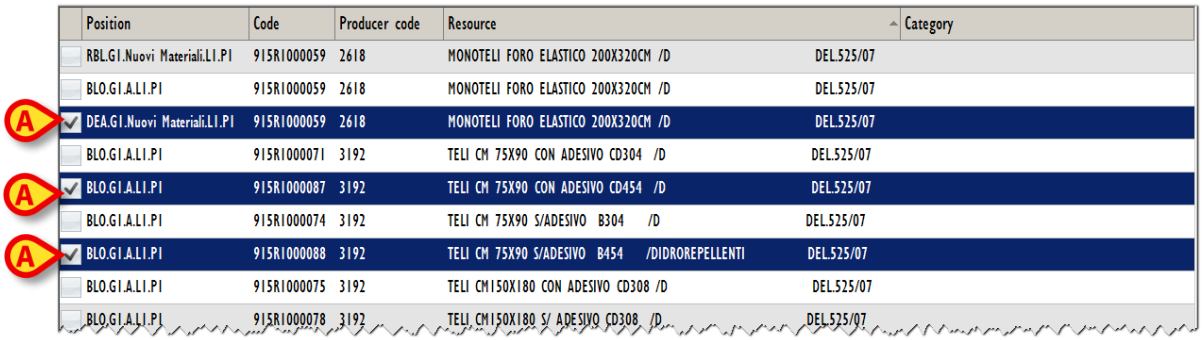
Fig 309

➢ Click the **Search** button on the command bar (Fig 309 **B**).

The list of resources corresponding to the data specified appears in the results area (Fig 309 **C**).

22.2. Results

The central part of the screen, indicated in Fig 308 **B** and shown in Fig 310 contains the results list.



	Position	Code	Producer code	Resource	Category
	RBL.G1.Nuovi Materiali.L1.P1	915R1000059	2618	MONOTELI FORO ELASTICO 200X320CM /D	DEL.525/07
	BLO.G1.A.L1.P1	915R1000059	2618	MONOTELI FORO ELASTICO 200X320CM /D	DEL.525/07
A	DEA.G1.Nuovi Materiali.L1.P1	915R1000059	2618	MONOTELI FORO ELASTICO 200X320CM /D	DEL.525/07
	BLO.G1.A.L1.P1	915R1000071	3192	TELI CM 75X90 CON ADESIVO CD304 /D	DEL.525/07
A	BLO.G1.A.L1.P1	915R1000087	3192	TELI CM 75X90 CON ADESIVO CD454 /D	DEL.525/07
	BLO.G1.A.L1.P1	915R1000074	3192	TELI CM 75X90 S/ADESIVO B304 /D	DEL.525/07
A	BLO.G1.A.L1.P1	915R1000088	3192	TELI CM 75X90 S/ADESIVO B454 /DIDROREPELLENTI	DEL.525/07
	BLO.G1.A.L1.P1	915R1000075	3192	TELI CM150X180 CON ADESIVO CD308 /D	DEL.525/07
	BLO.G1.A.L1.P1	915R1000078	3192	TELI CM150X180 S/ ADESIVO CD308 /D	DEL.525/07

Fig 310 - Search results

Each row corresponds to a resource. The following information (when available) is displayed for each resource:

- the position;
- the resource code;
- the manufacturer code;
- the resource description;
- the category.

Click the row corresponding to the wanted resource to select it. Multiple selection is either enabled or not by configuration. Fig 310 **A** shows three resources selected.

22.3. The command bar

The command bar (Fig 311) contains several buttons making it possible to access specific functionalities, described in this paragraph.

Fig 311 - Command bar

The **Keyboard** button displays a virtual keyboard that can be used for data entry (Fig 312).

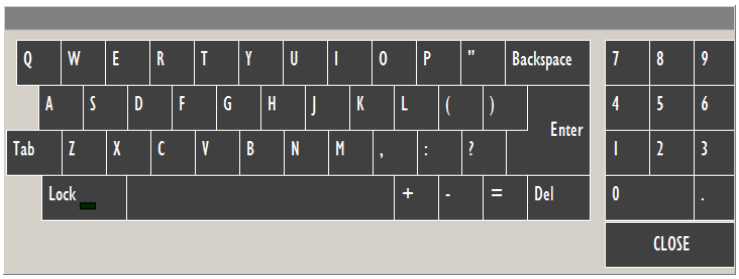


Fig 312

The buttons **Name** and **Position** make it possible to select the search modality.
When the **Name** button is selected the search modality is that described in paragraph 22.1.1. When the **Position** button is selected the search modality is that described in paragraph 22.4.

The **Label** button makes it possible to print a sticker label containing the barcode of the selected resource. The procedure to be performed for this purpose is described in paragraph 22.3.1.

Use the **Search** button to perform the search (see paragraph 22.1.1).

Use the **Select** button to select one of the items displayed on screen and insert it in the current procedure. The **Select** button is not active when the search module is selected through the icon on the lateral bar (this is the case described in this paragraph 22). The **Select** button is active when the search screen is accessed directly from the other modules.

To select an item

- click the row corresponding to the relevant item.

The row is highlighted (Fig 310 **A**).

- Click the **Select** button.

The selected item will be inserted in the current screen/procedure.

22.3.1. Print label for the selected resource

This paragraph describes the procedure that must be performed to print the barcode sticker label of a selected resource:

- search for the resource using the procedure described in paragraph 22.1.1.
- Click the row corresponding to the relevant resource.

The row is highlighted.

- Click the **Label** button.

The following screen opens, making it possible to specify the number of labels to be printed (Fig 313).

Fig 313

- Specify the number of labels in the field indicated in Fig 313 **A**.
- Click the **Continue** button (Fig 313 **B**).

The labels required will be printed.

22.4. Search by position

When the **Position** button on the command bar is selected a screen making it possible to search the resources by position opens (Fig 314).

Fig 314 - Search by position

The screen displays the complete resources list.
Three filters are on top (Fig 314 **A**), making it possible to reduce the number of items displayed.

The available filters are:

- “Stockroom” - Displays only the resources of a specific stockroom.
- “Cabinet group” - Displays only the resources of a specific cabinet group.
- “Cabinet” - Displays only the resources of a specific cabinet.

To use one of the filters

➢ click the button placed alongside the filter.

A menu containing all the available options opens.

Fig 315

- Click the wanted option.

The name of the chosen filter appears in the field. The list of items displayed changes accordingly. The **Reset** button (Fig 314 **B**) resets all the filters.

24. Contacts

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25.