Stock Management User Manual

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1. Stock Management

For general and detailed information about the Product environment and the instructions for use of the Control Bar software, see the specific documents of the Product. The knowledge and understanding of these documents is mandatory for an appropriate and safe use of the Stock Management system, described in this document.

1.1. Introduction

The “Stock Management” system offers a set of tools dedicated to the management of stockrooms and pharmacies of a clinical structure. The system, composed by several different modules, covers a wide range of tasks and needs related 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.

The specific healthcare organization can adopt a sub-set of modules in order to support its actual procedures.

1.2. The Stock Management modules

This section lists and briefly describes the modules that are part of Digistat® Stock Management. For each module are here provided: the name; a brief description; the corresponding icon; the shortcut to the corresponding section in this document.

Name	Icon	Section
Stock - Stock monitoring.		2
Material transfer - Resources transferral from one stockroom to another.		3
Expirations - Management of resources either expired or near-to-expiration.		4
Other pickings - Administrative discharge management.		5
Movements - Summary of all the movements of resources.		6
Cost center picking - Cost center attribution for resources picking.		7
Resources picking - Management of the resources picking procedures. It can be accessed from the "Cost center picking" module (section 7), after the relevant cost center has been selected.	-	8
Cost center return - Cost center attribution for the resources returned.		9
Resources allocation - Recording of the changes in the resources allocation.		10
Orders - Create and print the orders sheet		11
Returns - Returned resources management.		12
Waste - Wasted resources management.		13
Kit setup - Aid in the kit preparation procedure.		14
Returned resources from kit - Recording of the unused resources returned from the operating kits.		15
Generic kits - Generic kits creation and management procedures.		16
Generic kit link - This procedure makes it possible to link a generic kit to a specific operation.	-	17
Generic kits for emergencies - This procedure makes it possible to link a generic kit to an emergency operation.		18
Requests - Materials requests procedures management.		19
Emergencies - Quick creation and print of the resources list for the emergency operations.		20
Inventory - Inventory management.		21

1.3. How to select a module

To select a module:

- ➢ Click the corresponding icon on the lateral bar.

The icon is highlighted. The main page of the selected module is displayed.

1.4. Screen structure

The screens of the different modules have different layouts and functionalities but always maintain the same structure. This section shows a sample screen to highlight the items that are constant in the screen structure. These items are:

- the header (Fig 1 **A**);
- the selection filters (Fig 1 **B**);
- the data area (Fig 1 **C**);
- the command bar (Fig 1 **D**).

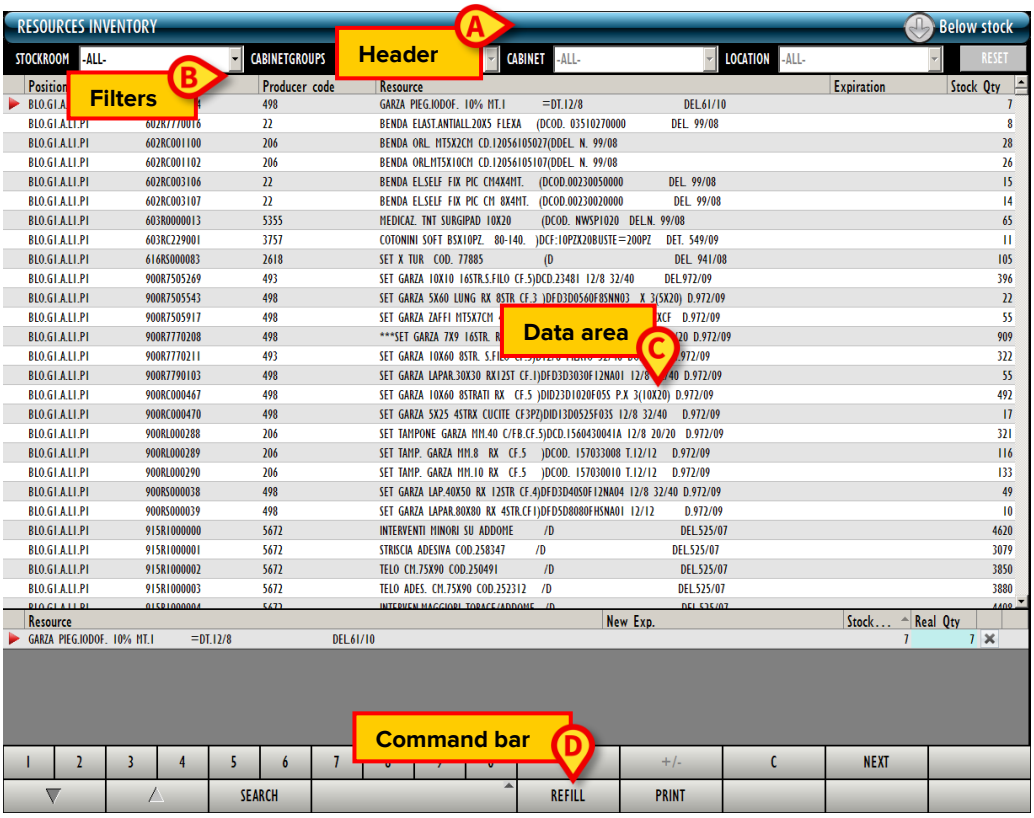


Fig 1

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 2 **A**). On the right three icons can be displayed (if configured), providing information on the state of the resources in stock (Fig 2 **B**).

Fig 2 - 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 there are different fields allowing to filter the items displayed on screen.

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

Fig 3

To use the filters:

- Click the button placed alongside the filter.

A menu containing the available options opens.

Fig 4

- Click the wanted option.

The name of the selected option is displayed in the field. The items displayed on screen change accordingly. The **Reset** button on the right (Fig 3 **A**) clears all the filters and displays the full list.

1.4.2.1. Date filter

A date filter is available in different contexts. Fig 5 shows an example.

Fig 5

To set a date

- Click the button placed alongside the field (Fig 5 **A**).

A calendar-window opens.

- On the calendar, the current date is selected by default. To select a different date, use the and buttons to change month, then click the number corresponding to the wanted day.

The selected date is displayed in the field.

1.4.3. Data area

The data area (Fig 1 **C**) displays the contents of the different screens. These contents are described later, with the relating module.

1.4.4. Command bar

The command bar (Fig 1 **D**) contains the buttons allowing to perform the procedures relating to the module selected. The command bars are described contextually to the specific modules.

1.5. Resources' optimistic management

In the "Stock Management" context, the phrase "Resources optimistic management" indicates that the expiration date of some resources can be edited. The "Optimistic management" can be enabled by configuration.
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 closest one. This guarantees that no expired resource is used. It is however possible that a resource is 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.

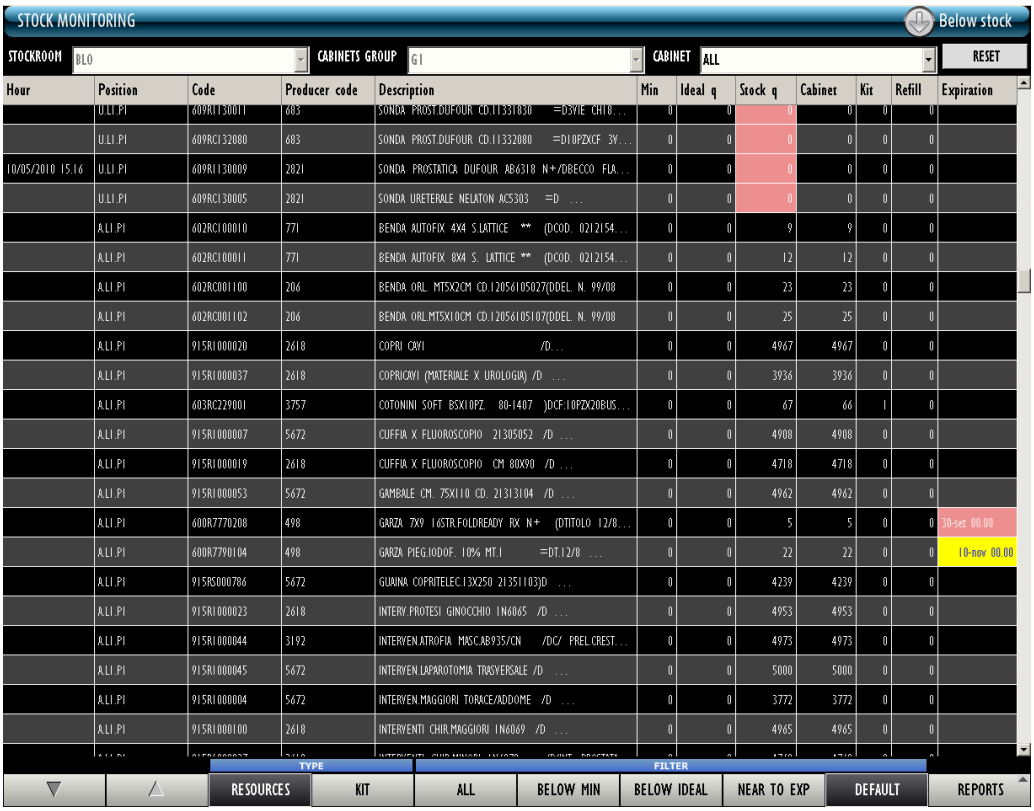


Fig 6 - Stock monitoring

2.1. Stock monitoring: screen structure

The “Stock monitoring” screen is structured as described in section 1.4. See section 1.4 for a description of the screen general features. This section describes the screen specific features.

2.1.1. Filters

Fig 7 - “Stock monitoring” screen filters

These are the available filters:

- “Stockroom” - Display the resources that are in a specific stock room.
- “Cabinet group” - Display the resources that are in a specific cabinet group.

- “Cabinet” - Display the resources that are in a specific cabinet.

2.1.2. Data area

The data area of the “Stock Monitoring” screen displays the list of all the resources uploaded in the system. Each row corresponds to a resource (Fig 8).

Hour	Position	Code	Producer code	Description	Min	Ideal q	Stock q	Cabinet	Kit	Refill	Expiration
	U.LI.PI	616RC000104	3796	SET MALECOT CD.410-103 24 FR.35 =DPOST NEFROS...	0	0	0	0	0	0	
	U.LI.PI	609RI130011	683	SONDA PROST.DUFOUR CD.11331830 =D3VIE CH18...	0	0	0	0	0	0	
	U.LI.PI	609RCI32080	683	SONDA PROST.DUFOUR CD.11332080 =D10PZXCF 3V...	0	0	0	0	0	0	
10/05/2010 15.16	U.LI.PI	609RI130009	2821	SONDA PROSTATICA DUFOUR AB6318 N+/DBECCO FLA...	0	0	0	0	0	0	
	U.LI.PI	609RCI30005	2821	SONDA URETERALE NELATON AC5303 =D ...	0	0	0	0	0	0	
	A.LI.PI	602RCI00010	771	BENDA AUTOFIX 4X4 S.LATTICE ** (DCOD. 0212154...	0	0	9	9	0	0	
	A.LI.PI	602RCI00011	771	BENDA AUTOFIX 8X4 S. LATTICE ** (DCOD. 0212154...	0	0	12	12	0	0	
	A.LI.PI	602RC001100	206	BENDA ORL. MT5X2CM CD.12056105027(DDEL. N. 99/08	0	0	23	23	0	0	
	A.LI.PI	602RC001102	206	BENDA ORL.MT5X10CM CD.12056105107(DDEL. N. 99/08	0	0	25	25	0	0	
	A.LI.PI	915RI000020	2618	COPRI CAVI /D...	0	0	4967	4967	0	0	

Fig 8 - Stock monitoring

For each resource the following information is displayed:

- **Hour** - Time of the latest “under stock” alarm generated by the resource.
- **Position** - Indication of the resource location.
- **Code** - Resource code.
- **Producer** - Manufacturer code.
- **Description** - Resource description.
- **Min** - Minimum suggested quantity in stock .
- **Ideal quantity** - Ideal suggested quantity 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** - Quantity of resources located in the cabinets.
- **Kit** - Quantity of resources located in the generic kits already prepared.
- **Refill** - Suggested quantity of resource to be acquired.
- **Expiration** - Expiration date. If the expiration date is close (proximity is defined in the 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.

All or part of the possible information can be displayed.

2.1.3. Command bar

The command bar (Fig 9) contains the buttons making it possible to change the way the items on screen are displayed.

Fig 9 - Stock monitoring: command bar

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

Use the "TYPE" buttons (Fig 10) to select the kind of items displayed on screen (either resources or kits).

Fig 10

Use the "FILTER" buttons to select the subset of items displayed on screen.

Fig 11 - 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 **Near to Exp.** button displays the items that are close to expiration (expiration proximity is defined by configuration).
The **Default** button displays a default modality, chosen by configuration.
The **Reports** button makes it possible to access the module's print functionalities. See section 2.1.4 for a description of these functionalities.

2.1.4. Print documentation

To access the system's print functionalities

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

A selection menu opens, making it possible to choose the kind of document to be printed. The number and function of the available print reports is decided during configuration and changes according to the specific healthcare organization procedures.

- On the menu, click the button corresponding to the wanted option.

A print preview is displayed.

3. Materials transfer

The “Materials transfer” allows 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 12):

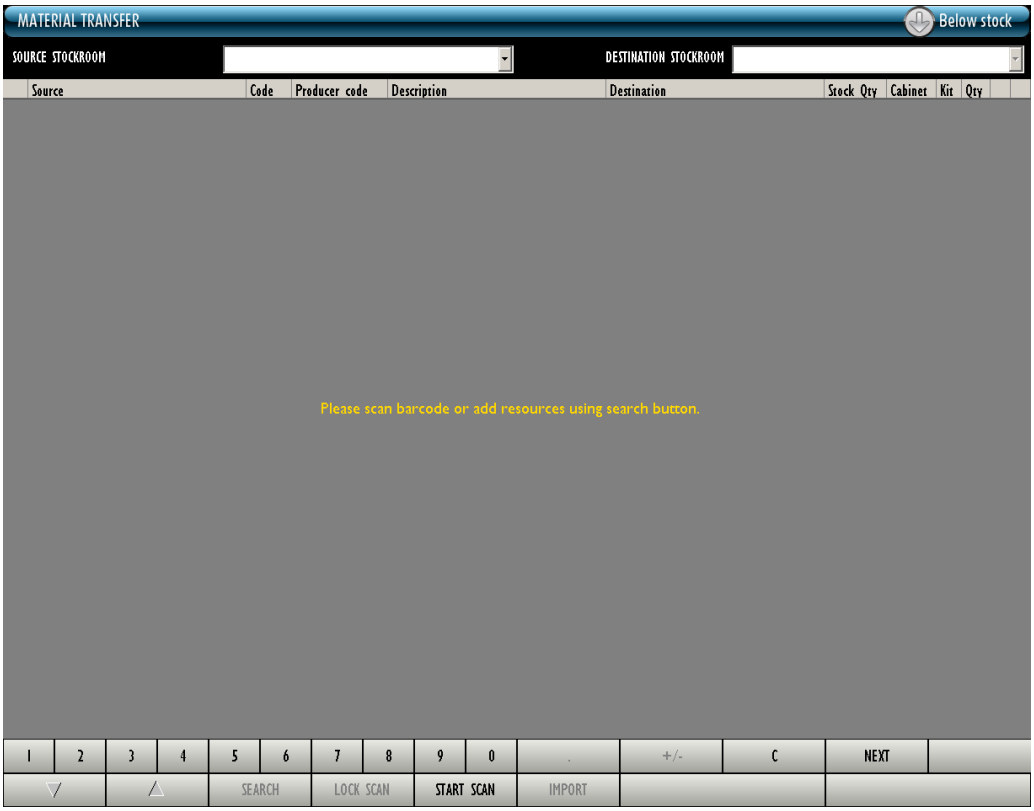


Fig 12 - Materials transfer

3.1. Materials transfer - screen structure

The “Materials transfer” screen is structured as described in section 1.4. See section 1.4 for a description of the screen general features. This section describes the screen specific features.

3.1.1. Source and destination stockroom selection

Fig 13 - Filters of the “Materials transfer” screen

The available filters on the “Materials transfer” screen (Fig 13) are:

- “Source stockroom” - Select the stockroom from which the resources that must be transferred come.

- “Destination stockroom” - Select the stockroom to which the resources are transferred.

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 14 **A**).

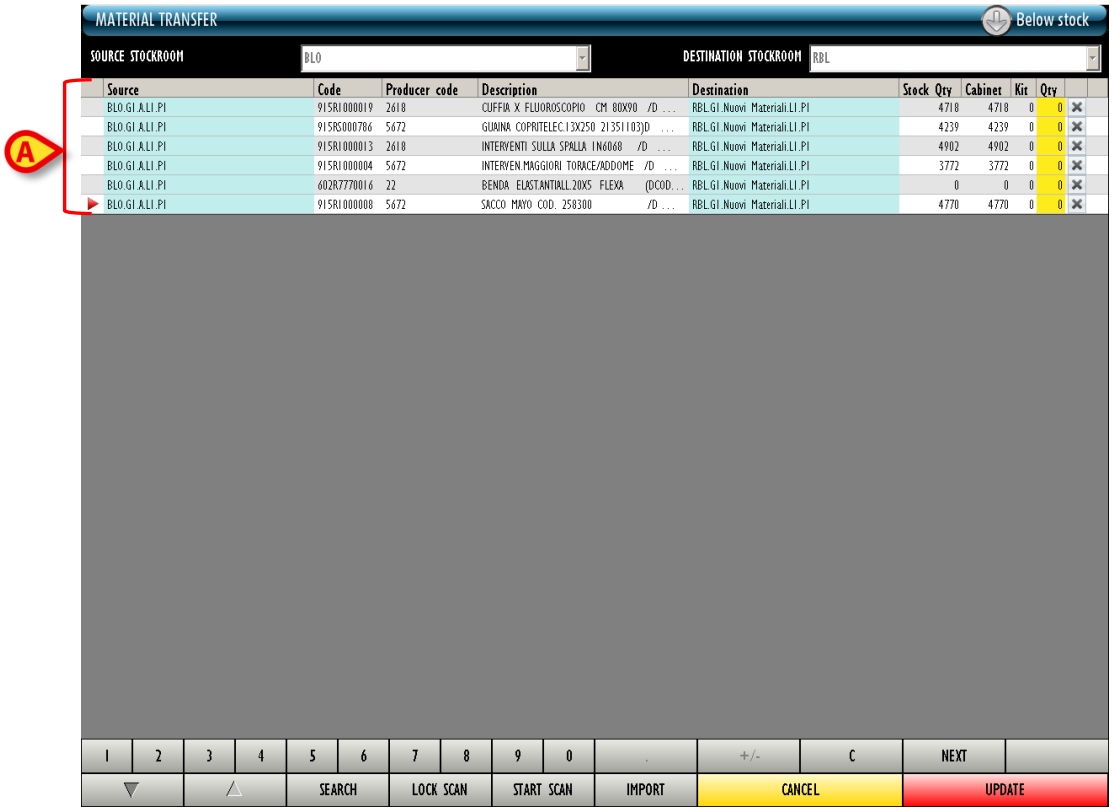


Fig 14 - Materials transfer

Each row corresponds to a 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 (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 information can be specified, depending on the resource configuration.

The ▶ arrow displayed on the left indicates the selected resource.

The ✕ icon displayed on the right cancels the resource. The cancelled resource appears as shown in Fig 15 **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 15 - Cancelled resource

The resources corresponding to the rows cancelled this way disappear when the screen is updated. The ↩ displayed at the end of each row is an “undo” button that brings the resource back to its original state.

The fields highlighted yellow are mandatory. The resource transfer procedure cannot be completed without specifying one of the mandatory fields.

The nature and kind of mandatory information change according to the resource configuration. When a mandatory field is specified it turns light-blue (Fig 16).

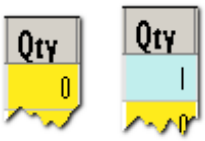


Fig 16

3.1.3. “Materials transfer” screen command bar

The command bar (Fig 17) is formed of buttons triggering different funtionalities. This section briefly describes these functionalities, referring to successive sections if more detailed instructions on a specific functionality are required.

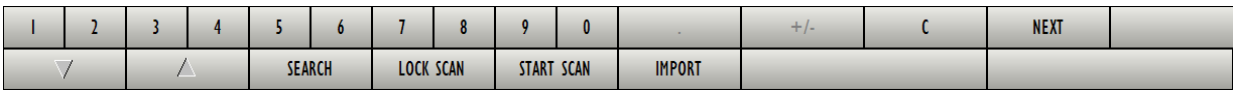


Fig 17 - Command bar

The buttons in the upper row allow to manage the numeric data.

Fig 18 - Numeric buttons

Upper row

Use the numeric buttons (Fig 18) 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 makes sense.

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

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

Lower row

Use the arrow button to scroll up and down the screen contents.

Use the **Search** button to access the system’s search functionalities (described in section 22). Click this button to open the screen shown in Fig 24.

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

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

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

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

Click **Update** to save.

Click **Cancel** to discard the changes.

3.2. Editing the resource data

The resource data can be edited by the user, depending on the configuration of the resource. Editable fields are highlighted either yellow or light-blue.
To edit the resource data

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

The button is displayed in the field (Fig 19 **A**).

- Click the button.

A menu containing the possible options opens (Fig 19 **B**).

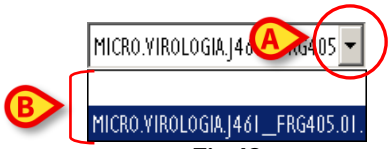


Fig 19

- Click the wanted option.

The option is displayed in the field. The available options depend on context. For example: the "position" field displays 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 section, 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 20 **A**).

- Click the cell indicating the "Quantity" (Fig 20 **B**).

The quantity is highlighted.

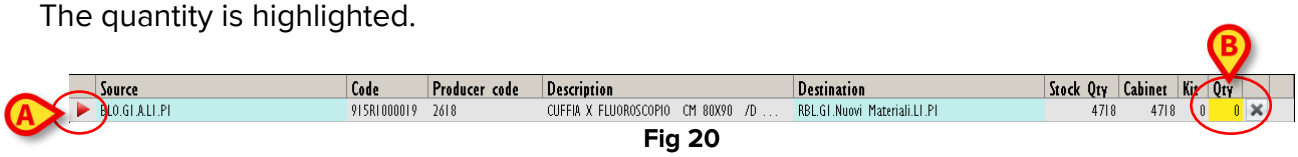


Fig 20

- Set the new quantity using either the workstation keyboard or the numeric buttons on the command bar (Fig 21).

Fig 21 - Numeric buttons

3.3. How to record the materials transfer

The materials transfer can be recorded either manually or using a barcode reader.

Barcode technology is recommended when selecting an item. Scanning the item's barcode, instead of selecting it manually, statistically reduces selection errors.

3.3.1. Manual recording

To record the material transfer manually

- Select the "source" stockroom (Fig 22 **A**).
- Select the "destination" stockroom (Fig 22 **B**)

Fig 22

- Click the **Search** button on the command bar (Fig 23).

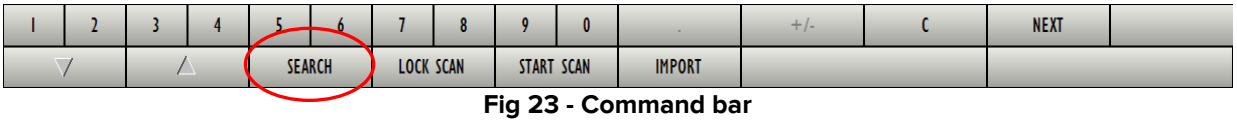


Fig 23 - Command bar

The "Search" screen opens (Fig 24). This screen is described in section 22.

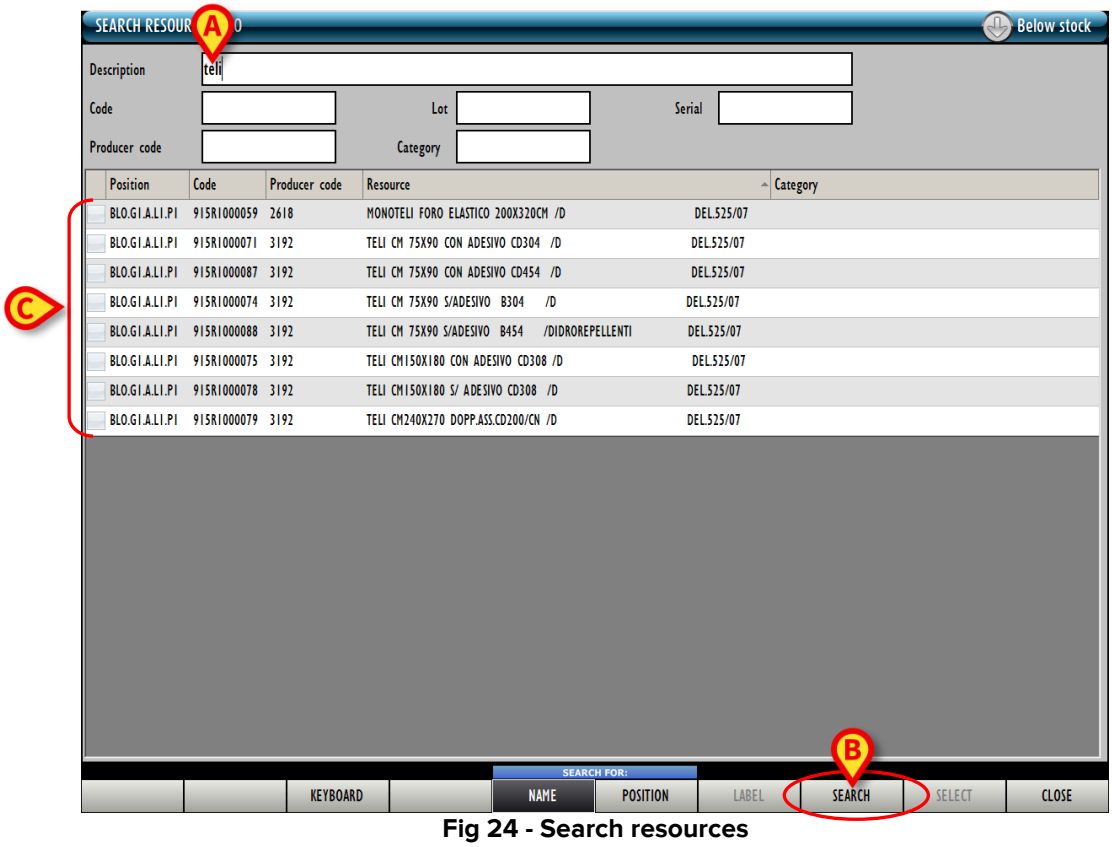


Fig 24 - Search resources

- Insert the resource available data in the search fields (Fig 24 **A**).
- Click the **Search** button on the command bar (Fig 24 **B**).

The list of resources whose data match those specified is displayed on screen (Fig 24 **C**).

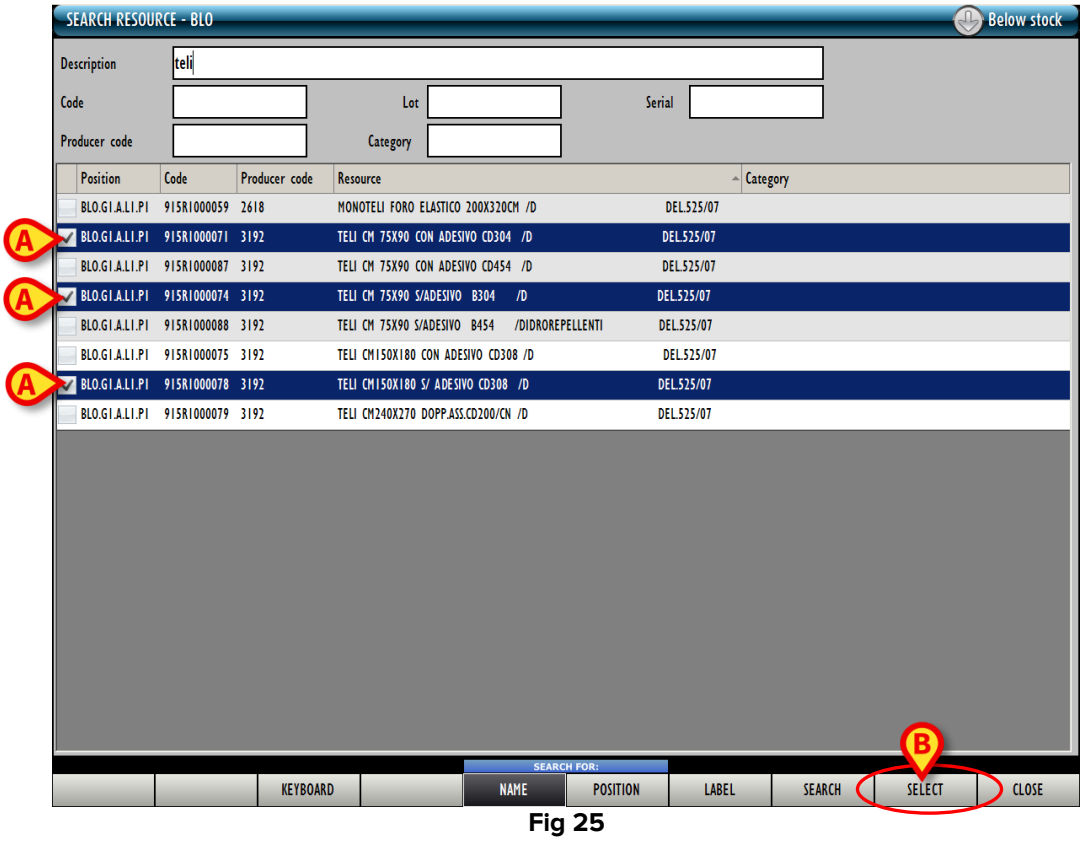


Fig 25

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

The corresponding row/s is/are highlighted (Fig 25 **A**).

- Click the **Select** button on the command bar (Fig 25 **B**).

The resource/s selected this way are displayed in the “Materials transfer” screen (Fig 26 **A**).

Double click an item to display it directly.

Fig 26

- Set, if necessary, the resource values (destination, quantity, etc… see section 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. To record the transfer of materials and resources using barcode reading, when the “Materials transfer” screen is displayed (Fig 12, Fig 26):

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

The rows corresponding to the resources are displayed.

If a scanned barcode belongs to a resource that is not in the stockroom selected as “source”, a pink row is displayed to inform the user (Fig 27).

Fig 27 - Resource is not in the stockroom

Specific buttons on the command bar trigger specific barcode reading procedures. These are described in the following sections.

3.4.1. Lock scan

The **Lock Scan** button on the command bar (Fig 28) locks the workstation while the user reads numerous barcodes that will be imported later, all at the same time.

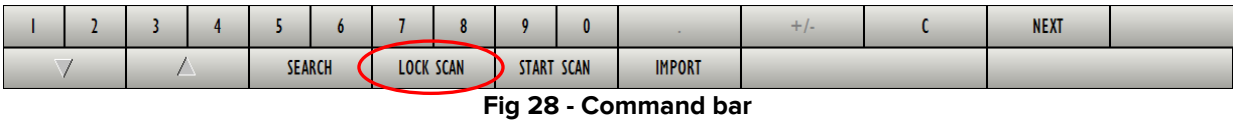


Fig 28 - Command bar

This functionality is used when it is necessary to leave the workstation to physically scan the barcodes of several items that are in a different place. A wireless barcode reader is required.

- Click the **Lock Scan** button.

The button appears selected (dark grey). The button remains this way while the workstation is locked. The following window id sisplayed on screen (Fig 29).

Fig 29

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

When barcodes reading is complete,

- Insert the user password in the field indicated in Fig 29 **A**.
- Click **Continue** (Fig 29 **B**).

The workstation is unlocked. The rows corresponding to all the barcodes read are displayed.

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

3.4.1.1. How to force the workstation unlocking

The workstation can be unlocked by another user if their permission level allows them. To force the workstation unlocking:

- Click “Advanced options” on the “Workstation locked” window (Fig 30).

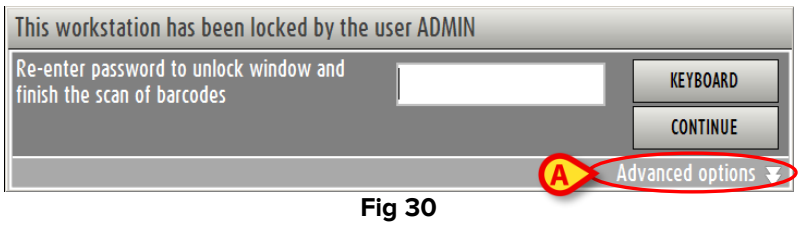


Fig 30

The window changes in the following way (Fig 31).

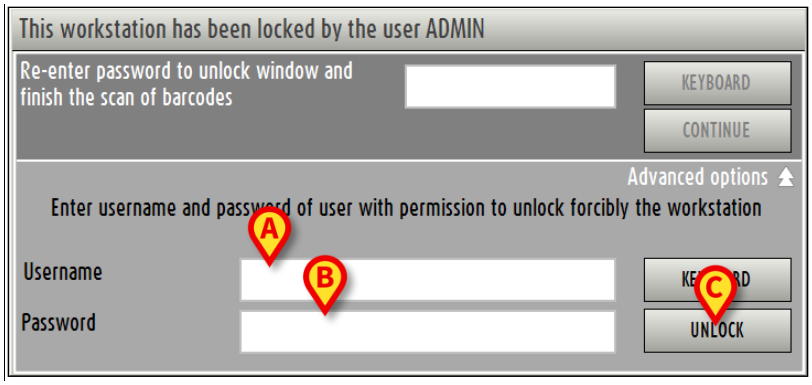


Fig 31 - Advanced options

- Insert the username of the new user in the “Username” field (Fig 31 **A**).
- Insert the password of the new user in the “Password” field (Fig 31 **B**).
- Click **Unlock** (Fig 31 **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 32) allows to read numerous barcodes that will be recorded later all at the same time.

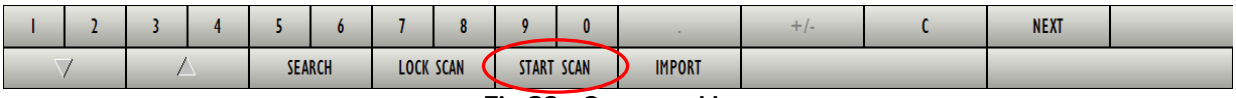


Fig 32 - Command bar

- Click the **Start Scan** button.

The button changes, turning to **Stop Scan**.

A pop-up window informs the user that barcode reading can start. The user is logged out. The user can now move to another place (i.e. stockroom) to read the barcodes.

- Read the barcodes.

After barcode reading, to import the data of the scanned resources. Return to a Digistat® workstation.

- Log in again.
- Click the

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

The rows corresponding to the scanned resources are displayed.

While scanning, the blue bar on top of the screen displays the following warning: “Press STOP SCAN to import the scanned products” (Fig 33).

Fig 33

3.4.3. Import

The **Import** button on the command bar (Fig 34) allows to import the data read with a wireless barcode reader having internal memory.

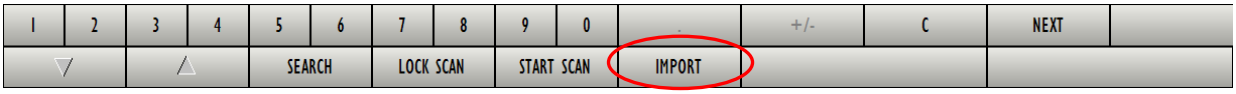


Fig 34 - Command bar

- Read the barcodes using the appropriate devices, properly configured.
- Click the **Import** button.

The following windows are displayed, informing on the import procedure state.

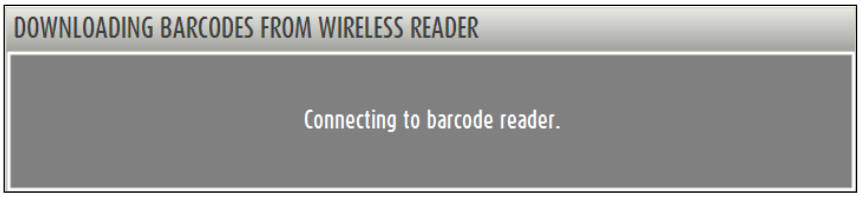


Fig 35

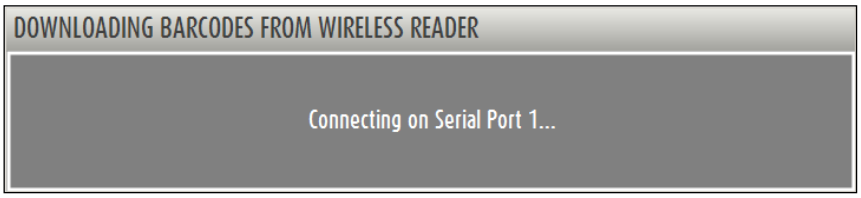


Fig 36

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

4. Expired resources management

The “Expired” module allows to display and manage the resources either expired or close to expiration. To select the module

- Click the corresponding icon .

The following screen opens (Fig 37).

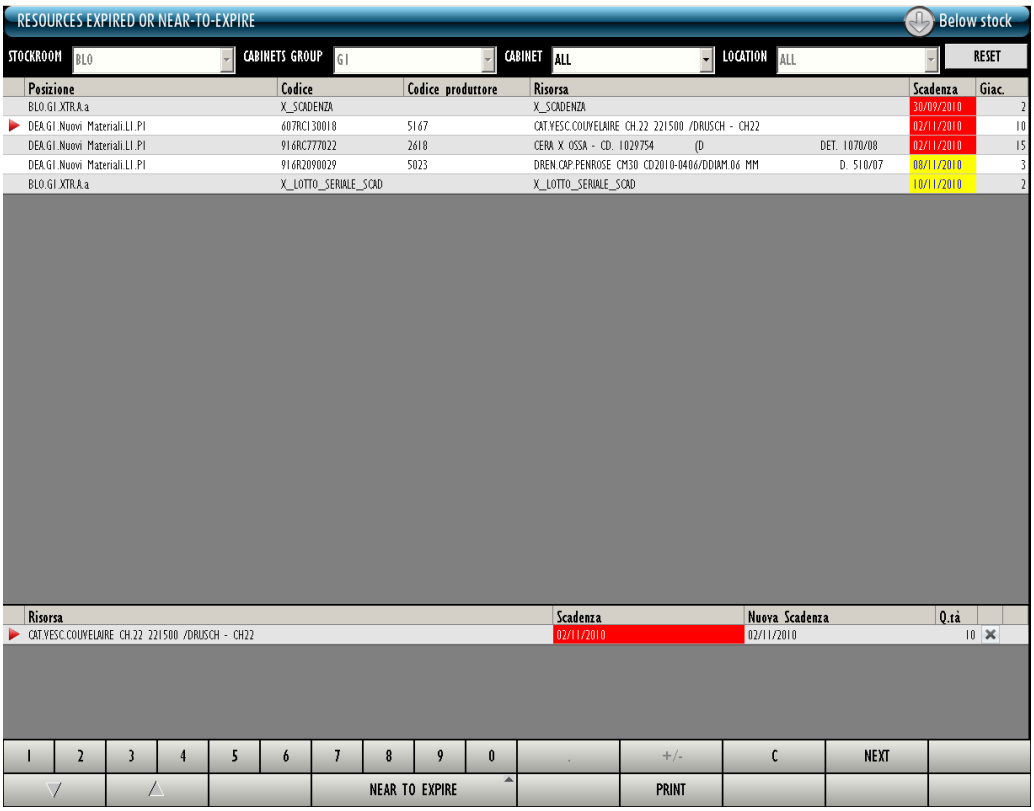


Fig 37 - Expired resources management

4.1. Expired resources management - screen structure

The “Materials transfer” screen is structured as described in section 1.4. See section 1.4 for a description of the screen general features. This section describes the screen specific features.

4.1.1. Filters

Fig 38 - Filters on the “Expired resources” screen

The available filters on the “Expired resources” screen (Fig 38) are:

- “Stockroom” - displays the resources of a specific stockroom.
- “Cabinets group” - displays the resources of a specific cabinets group.
- “Cabinet” - displays the resources of a specific cabinet.
- “Location” - displays the resources of a specific location.

4.1.2. Data area

The data area of the “Expired resources” area is formed of two parts (Fig 39).

Fig 39 - Expired resources

The upper area displays a list of resources (Fig 39 **A**). The list actually displayed depends on an option selected on the command bar. See section 4.1.2.1. 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 (Fig 39 **C**).

Each row in the list corresponds to a resource type. For each resource type, on the upper area (Fig 39 **A**), the following information is provided:

- 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 39 **B**) displays the information of the resource selected in the upper area.
In this area each row corresponds either to a single resource or to a set of resources belonging to the same lot, 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 can be available.

The arrow at the beginning of a row indicates the selected resource.
The selection of a row in the upper area (type) displays the resources (items) 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 sets of items having different expiration dates).
The items displayed in the lower area are those indicated by the button shown in Fig 39 **C**.
I.e. these are either “expired”, “near to axpiration” or “all” the resources depending on the option selected on the command bar.
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 40).

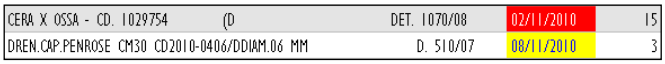


Fig 40 - expired and closet o expiration resources

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.

The icon on the right deletes the corresponding row. The procedure is described in section 4.2.2.

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

4.1.2.1. Type of resource selection

The button on the command bar indicated in Fig 39 **C** allows to select the set of items displayed on screen. To change the set of items displayed,

- Click the button.

The following options are displayed

Fig 41

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

4.1.3. The command bar of the "Expired" screen

The command bar (Fig 42) is formed of buttons triggering different funtionalities. This section briefly describes these functionalities, referring to successive sections if more detailed instructions on a specific functionality are required.

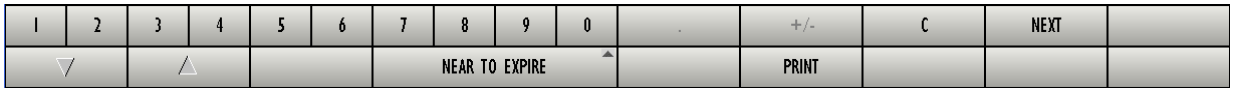


Fig 42 - Command bar

The buttons in the upper row allow to manage the numeric data.

Fig 43 - Numeric buttons

Upper row

Use the numeric buttons (Fig 43) 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 makes sense.

The “ **C** ” button brings back to zero the specified quantities.
The **Next** button selects the item following the one currently selected.

Lower row
Use the arrow button to scroll up and down the screen contents.
The **Near to Expire** changes the list of items displayed. See section 4.1.2.1.
Use the **Print** button to print the list of resources currently displayed.
When editing the screen contents the **Update** and **Cancel** buttons are displayed on the command bar. After editing:

Click **Update** to save.

Click **Cancel** to discard the changes.

4.2. “Expired resources”: data entry

On the “Expired resources” module it is possible to:
- change the expiration dates;
- delete a resource from the list.

The editable values 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 section 1.5 for a description of this kind of resources.

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 is displayed on the left (Fig 44 **A**).

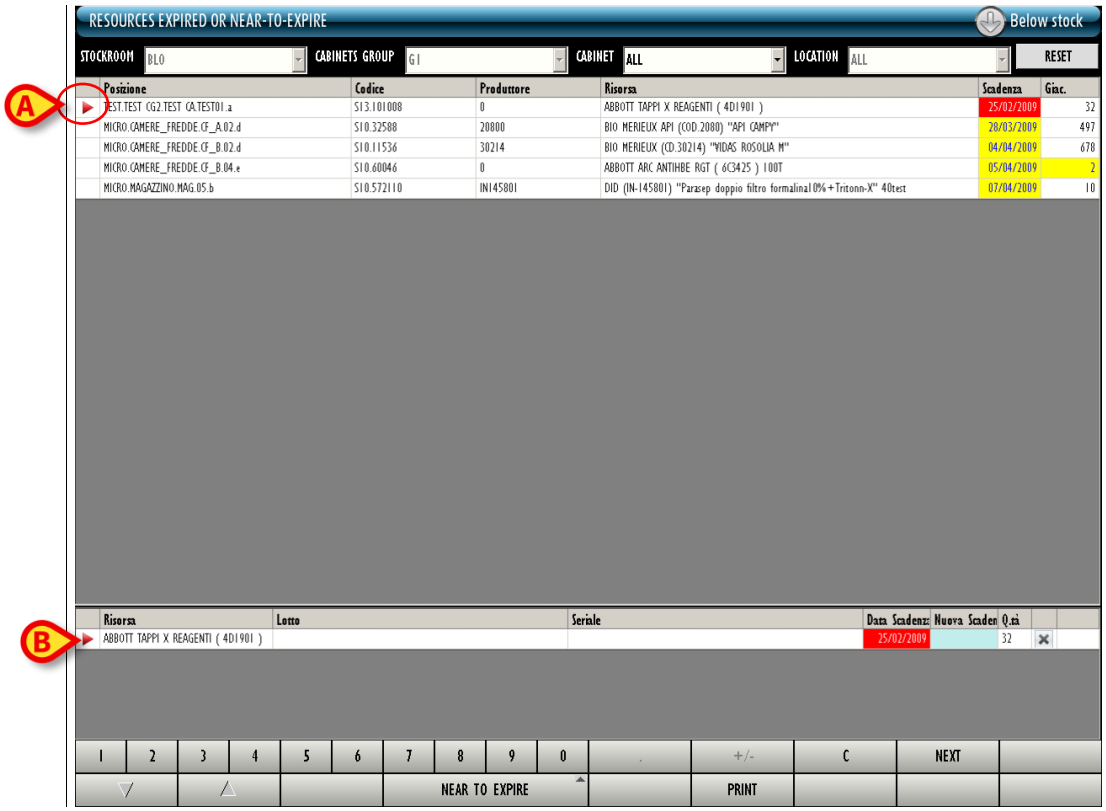


Fig 44

The items belonging to the selected type are displayed in the lower area (Fig 44 **B**).

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

- Click the cell indicating the resources' "new expiration date" (Fig 45).

The corresponding row is selected; the icon is displayed on the left. The button appears in the cell. The current date is displayed by default.

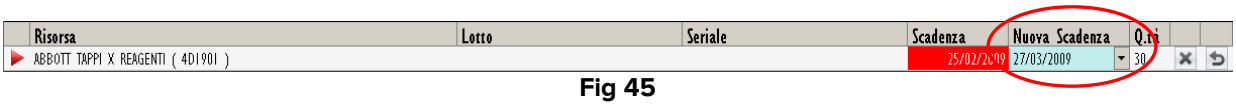


Fig 45

- Click the button.

A calendar-window opens (Fig 46).

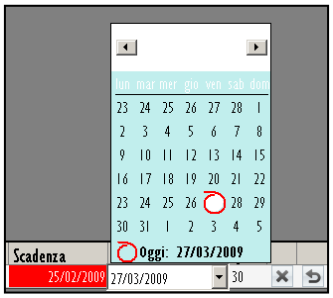


Fig 46

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

The new date is displayed in the “New expiration date” cell (Fig 47)

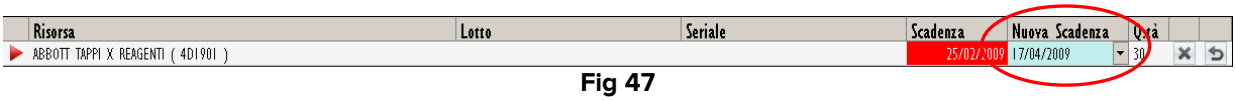


Fig 47

- Click **Update** on the command bar to save.

The expiration date is updated according to the new values (Fig 48).

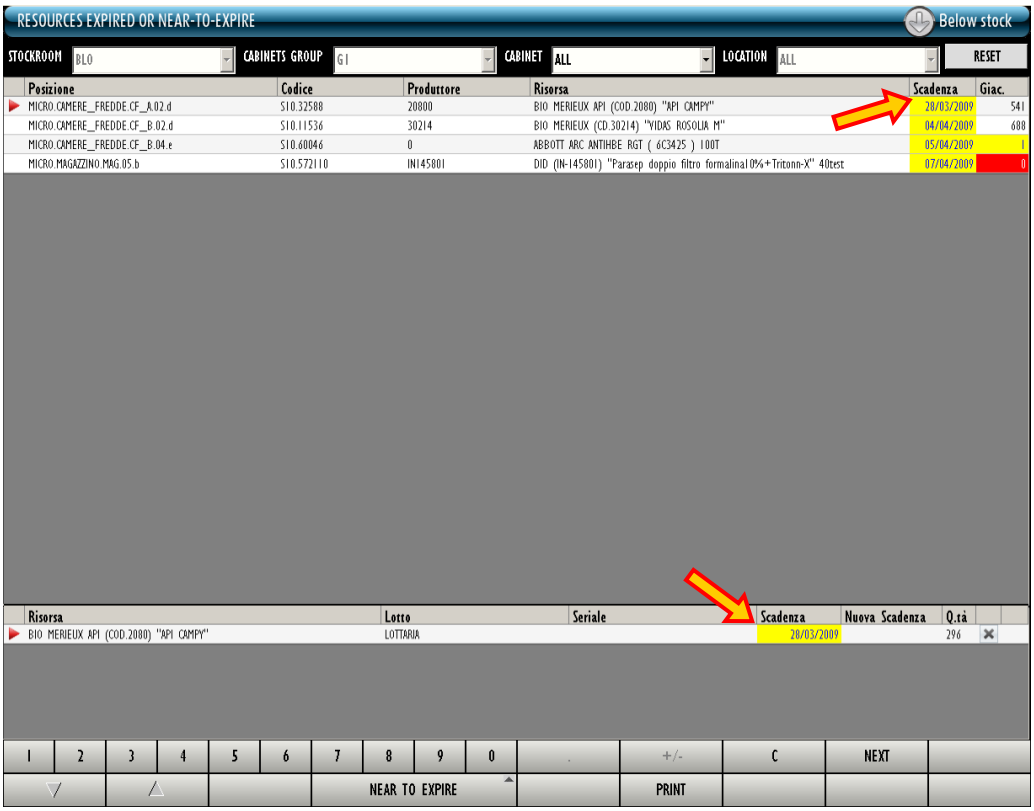


Fig 48

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 is displayed on the left (Fig 49 **A**).

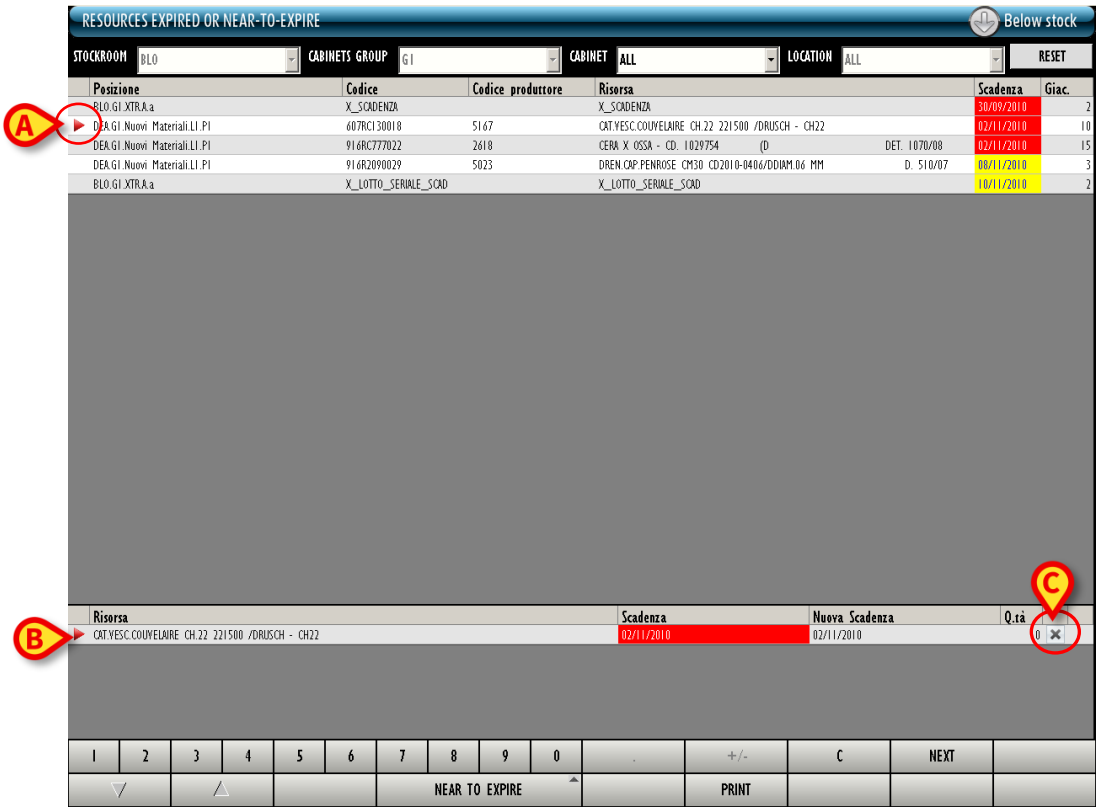


Fig 49

The details of the clicked resource are displayed in the lower area (Fig 49 **B**).
In the lower area, on the row corresponding to the resource that must be deleted,

- Click the button on the right (Fig 49 **C**).

The row is displayed in strike-through characters (Fig 50).

Fig 50

- Click **Update** 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 allows 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 different reasons for picking materials are defined during configuration and depend on the actual procedures in use. To access the administrative discharge screen

- Click the

icon on the lateral bar.

The following screen opens (Fig 51).

Fig 51 - Administrative discharge screen

5.1. “Administrative discharge” - screen structure

The “Administrative Discharge” screen is structured as described in section 1.4. See section 1.4 for a description of the screen general features. This section describes the screen specific features.

5.1.1. Filters

Fig 52 - Filters on the “Administrative discharge” screen

The available filters (Fig 52) are:

- “Stockroom” -Specify the stockroom in which the resources are located.
- “Cabinets group” - Specify the cabinets group in which the resources are located.
- “Cabinet” - Specify the cabinet in which the resources are located.

The checkbox enlarged in Fig 53, if checked, makes it possible displays only resources expiring before a specified date. A configuration parameter either enables or disabile the date specification possibility. If selection is disabled this filter is not active.

Fig 53

5.1.2. Data area

The data area of the “Administrative discharge” screen displays the list of the resources matching the features specified in the filters (Fig 54 **A**).

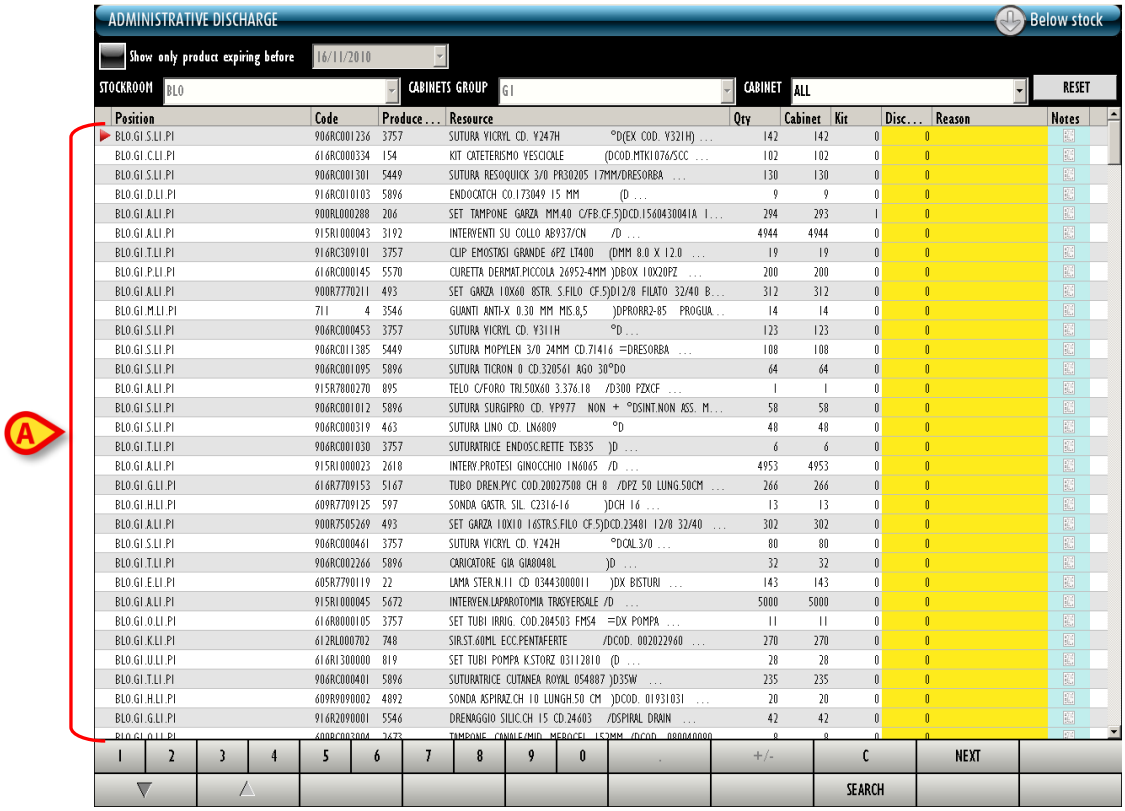


Fig 54 - Administrative discharge

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

- position;
- resource code;
- producer code;
- resource name;
- lot (if available);
- expiration date (if available);
- serial number (if available);
- 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 configured minimum quantity, the corresponding cell is highlighted pink; when the quantity in stock for a resource is less than the configured ideal quantity, the corresponding cell is highlighted yellow.

The rows highlighted green indicate resources that are not anymore in use, for which there is still a ceratin amount in stock.

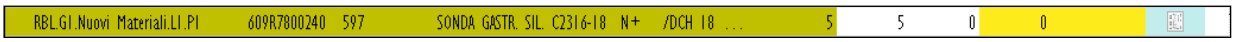


Fig 55

5.1.3. “Administrative discharge” - the command bar

The command bar (Fig 56) is formed of buttons triggering different funtionalities. This section briefly describes these functionalities, referring to successive sections if more detailed instructions on a specific functionality are required.

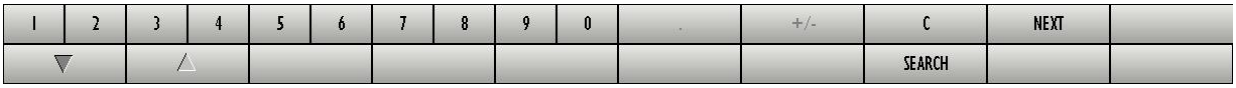


Fig 56 - Command bar

The buttons in the upper row allow to manage the numeric data.

Fig 57 - Numeric buttons

Upper row

Use the numeric buttons (Fig 57) 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 makes sense.

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

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

Lower row

Use the arrow button to scroll up and down the screen contents.

Use the **Search** button to search the items matching the specified filters.

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

Click **Update** to save.

Click **Cancel** to discard the changes.

5.2. How to record the resource discharge

To record the discharge of a resource

- Insert the resource data in the selection filters (Fig 58 **A** - if no filter is specified the screen displays the full list of resources).

- Click the **Search** button on the command bar (Fig 58 **B**).

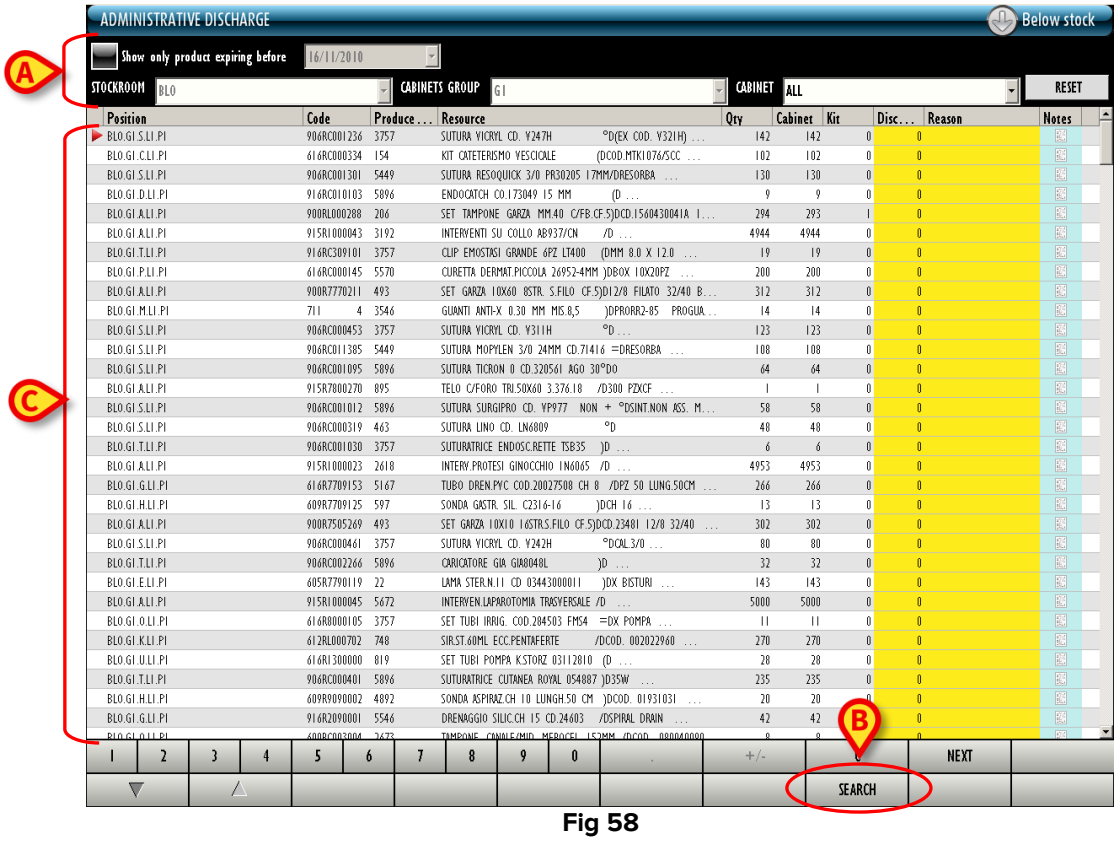


Fig 58

The list of resources matching the specified values is displayed on screen (Fig 58 **C**).

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

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

- Specify the resource quantity using either the workstation keyboard or the numeric buttons on the command bar.

The specified quantity is displayed in the “Discharge” cell (Fig 59 **A**).

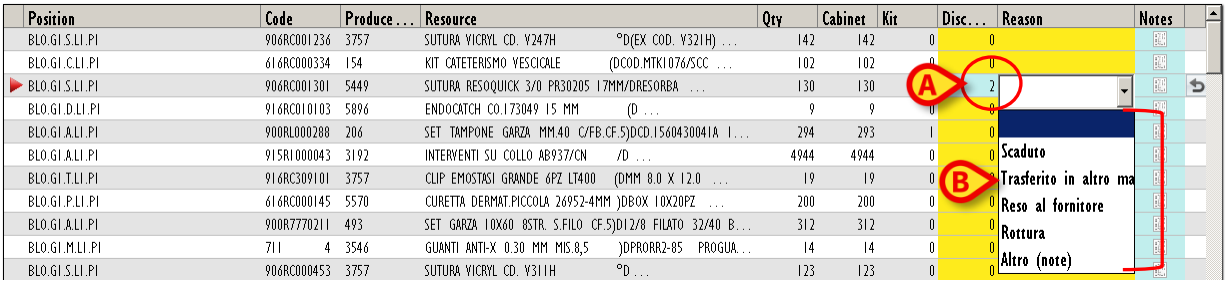


Fig 59

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

A drop down menu is displayed, offering various configured options (Fig 59 **B**).

- Click the relevant option.

The selected reason appears in the “Reason” cell.

Use the icon on the left to undo.

- Click **Update** to save.

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 following window is displayed (Fig 60).

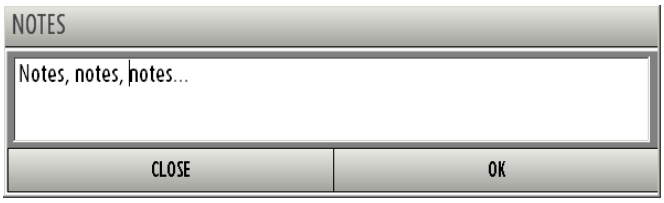


Fig 60

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

The note is this way saved. The corresponding icon changes in the following way: (Fig 61).

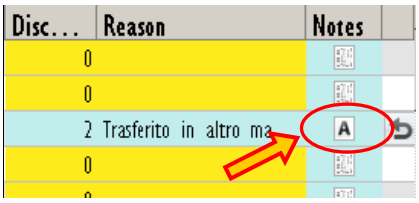


Fig 61

To read the note again

- Click the icon (Fig 61).

6. Movements summary

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

- Click the

icon on the lateral bar. The following screen opens (Fig 62).

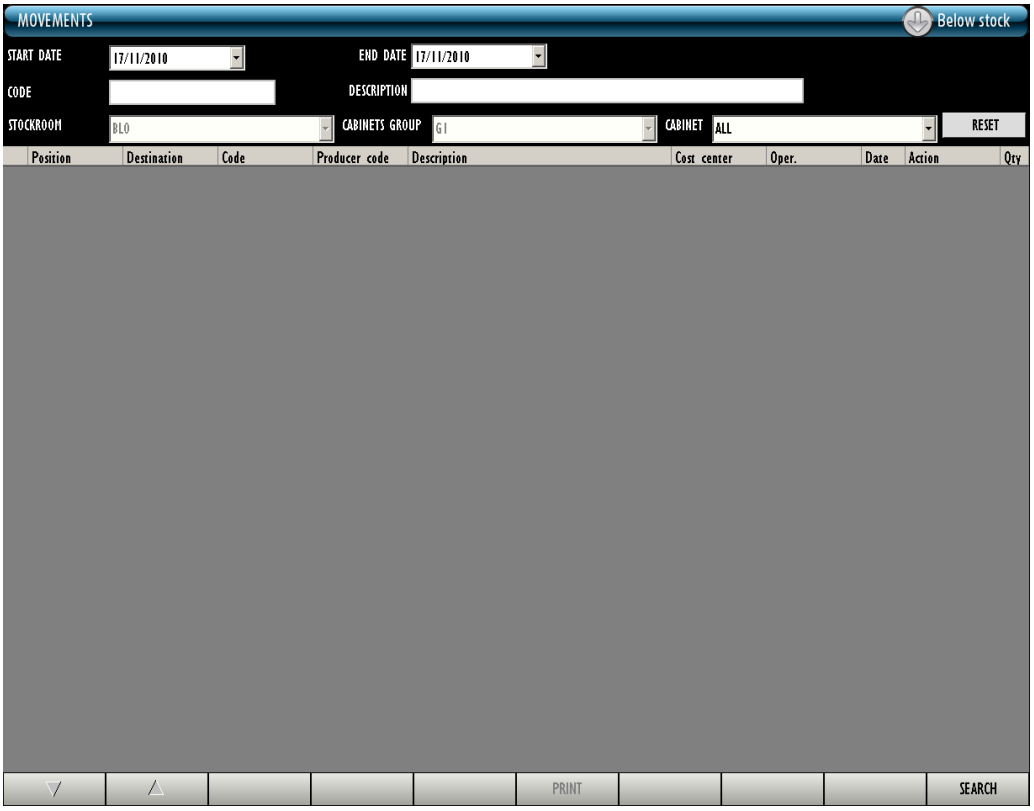


Fig 62

6.1. “Movements summary” - screen structure

The “Movements summary” screen is structured as described in section 1.4. See section 1.4 for a description of the screen general features. This section describes the screen specific features.

6.1.1. Filters

Fig 63 - Filters in the “Movements” screen

The available filters on the “Movements summary” screen are:

- “Start date” and “End date” - display the list of movements recorded in the time span defined by the two dates.
- “Code” - display the resource/s matching the inserted code.
- “Description” - display the resource/s matching the inserted description.
- “Stockroom” – display the resource/s matching the specified stockroom.
- “Cabinets group” - display the resources located in a specific cabinets group.
- “Cabinet” – display the resources located in a specific cabinet.

6.1.2. Data area

The data area of the “Movements” screen displays the list of movements of the resources whose features match those specified in the filters and that were recorded during the time period comprised between the specified “Start” and “End” date (Fig 64 **A**).
This is a read-only screen. None of the values can be edited.

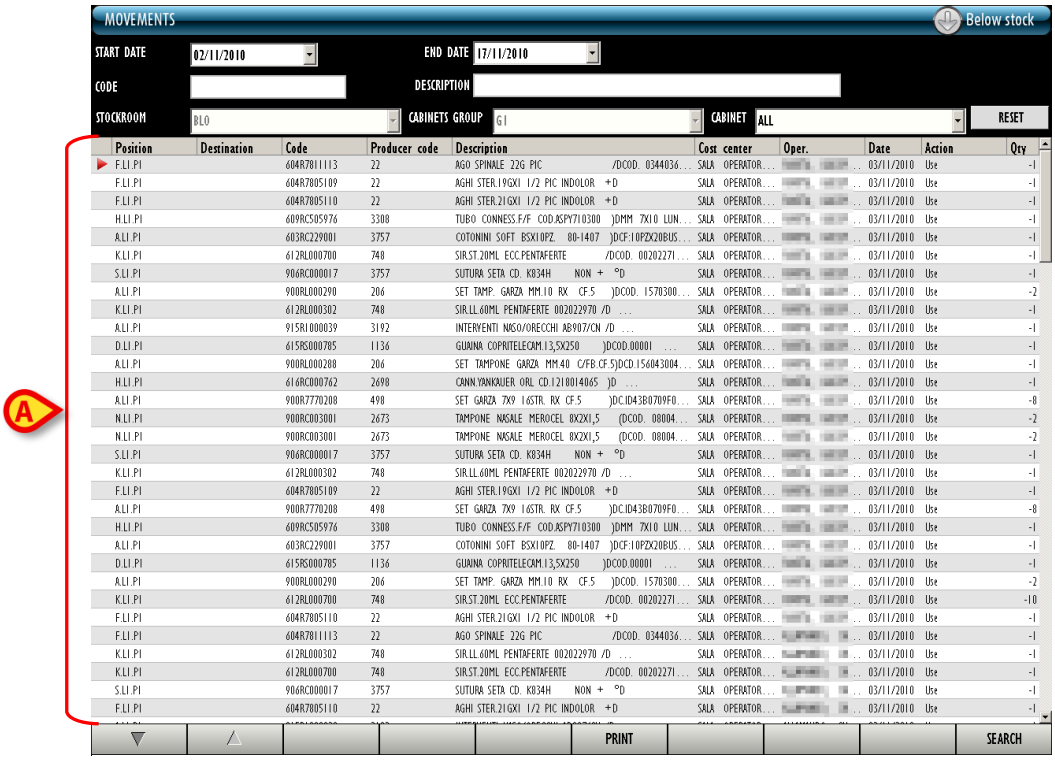


Fig 64 - Movements

Each row corresponds to the movement of a resource. Each single action is displayed separately, even if 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 available);
- the expiration date (if available);
- the serial number (if available);
- the relevant cost center (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 an operation, 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.

6.1.3. The command bar of the “Movements” screen

This section describes the command bar of the “Movements summary” screen (Fig 65).

Fig 65 - Command bar

Use the arrow buttons to scroll up and down the screen contents.
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 66 **A**).

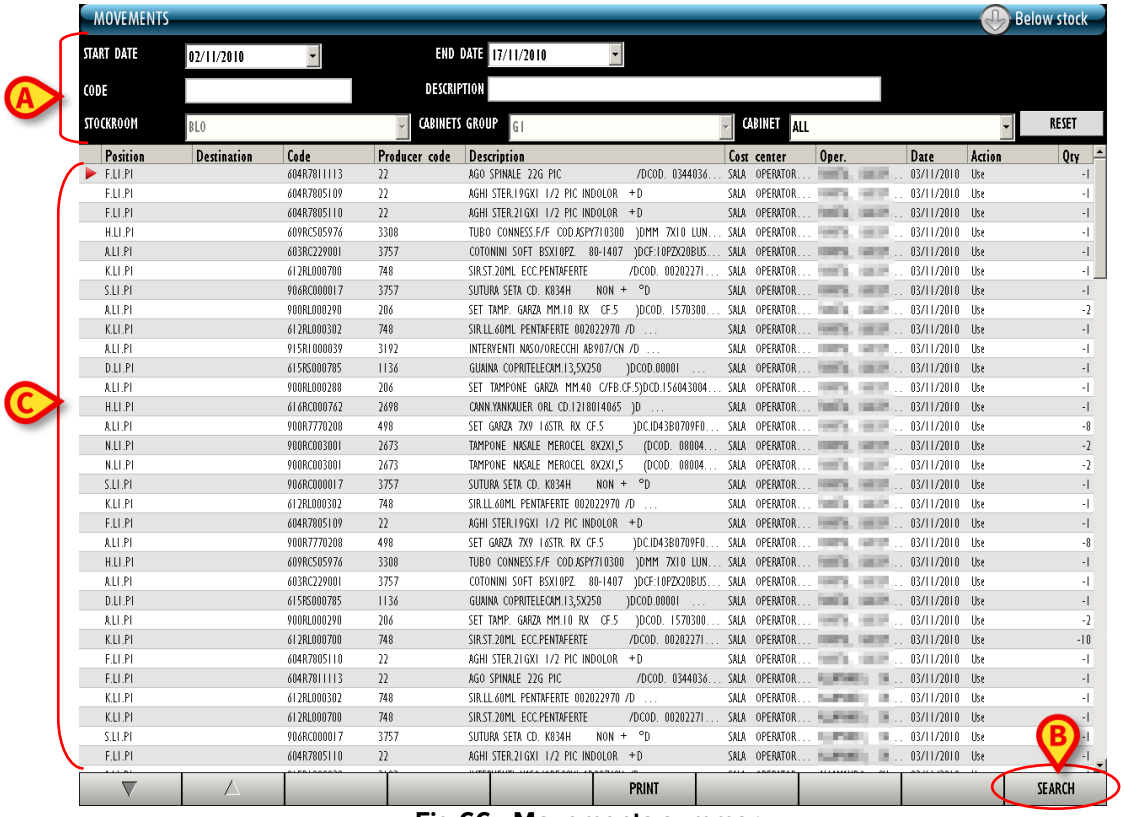


Fig 66 - Movements summary

- Click the **Search** button on the command bar (Fig 66 **B**).

The list of movements corresponding to the values specified in the search fields is displayed (Fig 66 **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 to select the cost center first. To select the cost center:

- Click the

icon on the lateral bar.

The “Cost center selection” module opens (Fig 67).

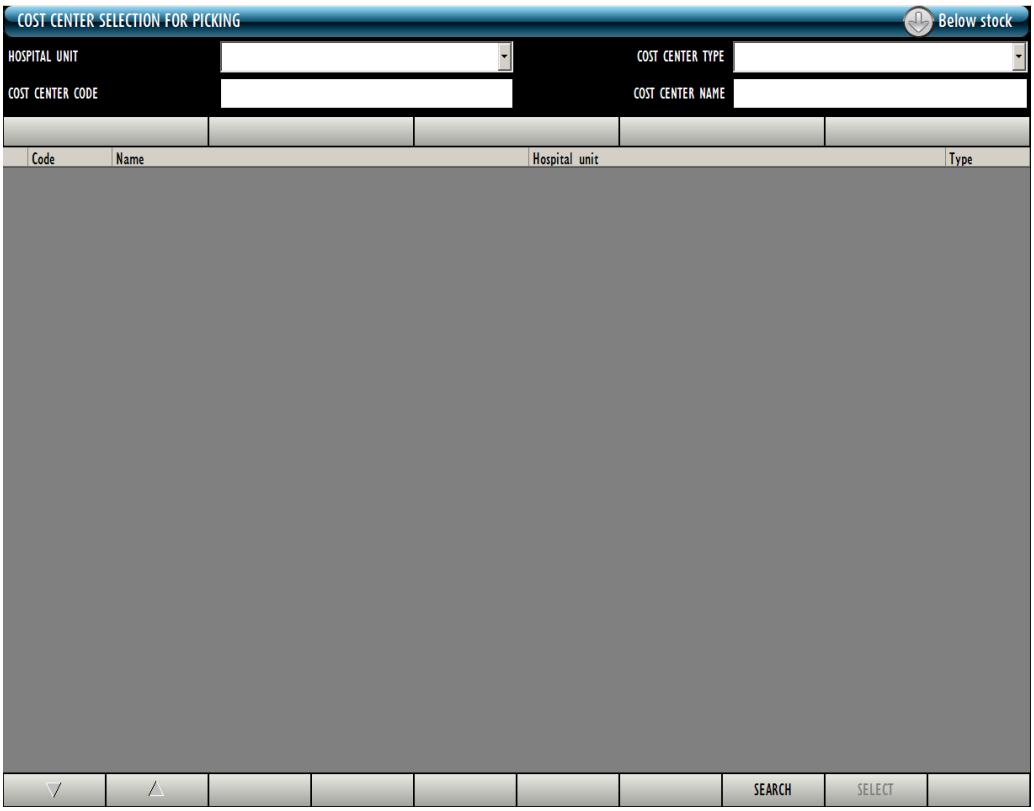


Fig 67 - Cost center attibution for resource picking

Section 7.1 describes the screen shown in Fig 67.
Section 7.2 describes the cost center attibution procedure.

7.1. Cost center: screen structure

The “Cost Center” screen is structured as described in section 1.4. See section 1.4 for a description of the screen general features. This section describes the screen specific 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 74).

7.1.1. Filters

Fig 68 - Filters on the “Cost center” screen

The available filters on the “Cost center” screen (Fig 68) 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.

“Hospital Unit” and “Type” can be selected on drop-down menus.

7.1.2. Data area

The data lists the cost centers matching the features specified in the filters (In Fig 69 **A** the “Ortopedia and Traumatologia” Hospital Unit is specified).

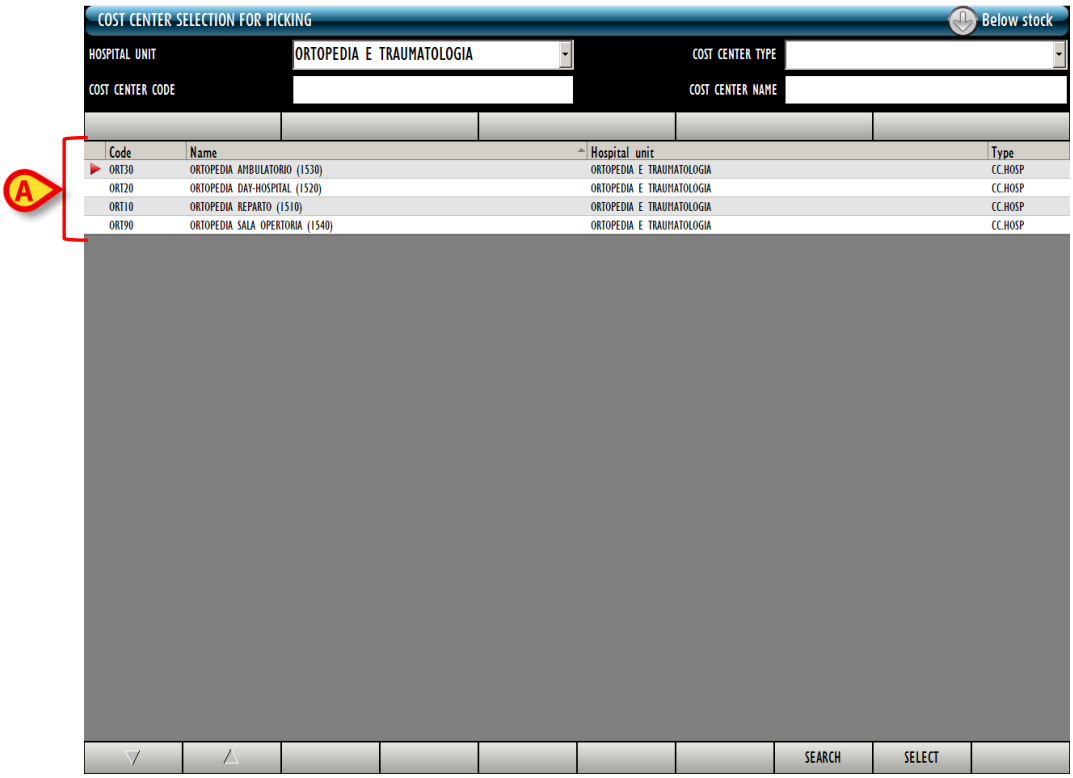


Fig 69 - Cost centers for resource picking

Each row corresponds to a cost center. For each cost center the following information can be displayed (all read-only):

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

The icon on the left indicates the selected cost center.

7.1.3. Cost center selection for picking: Command Bar

This section describes the buttons on the command bar (Fig 70).

Fig 70 - Command bar

Use the arrow buttons to scroll up and down the screen contents.

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

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

7.2. Cost center for picking selection procedure

This section describes the procedure enabling 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 71).

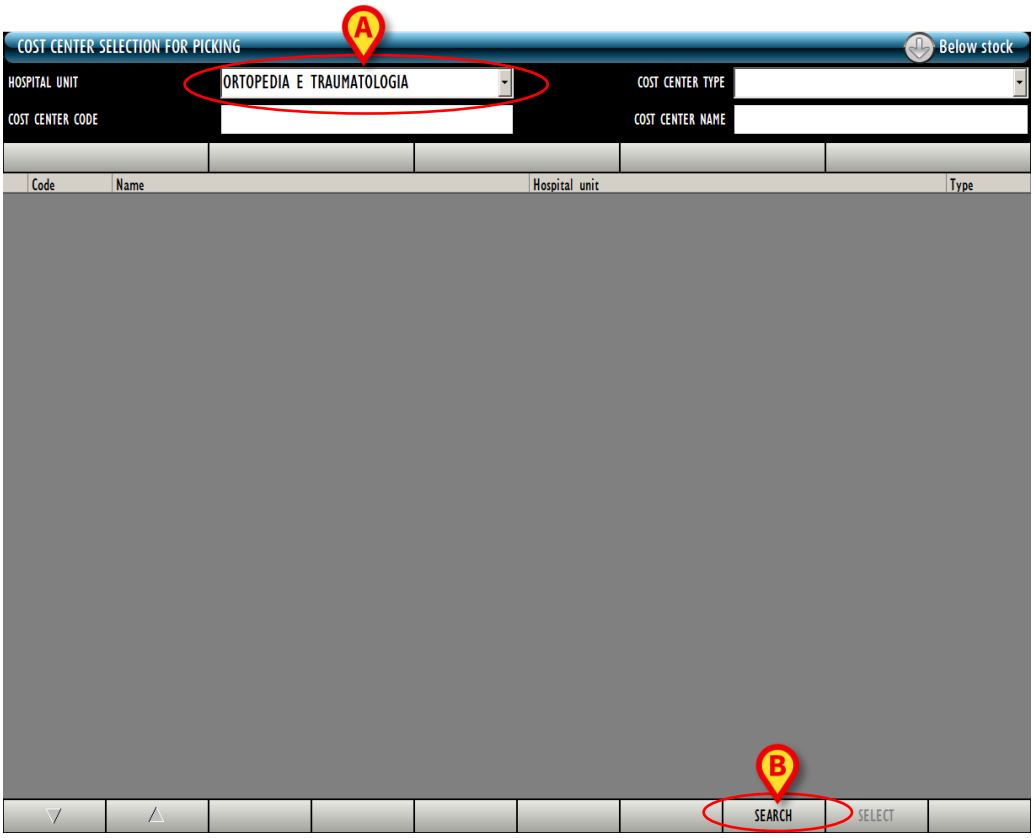


Fig 71 - Cost centers attribution for resource picking

- Specify, in the filters, the available data of the wanted cost center. In Fig 71 **A** the Hospital Unit "Ortopedia e Traumatologia" is specified.
- Click the **Search** button on the command bar (Fig 71 **B**).

The list of cost centers matching features specified is displayed (Fig 72 **A**).

Fig 72 - Search results

- Click the row corresponding to the wanted cost center.

The ▶ arrow is displayed on the left of the selected row.

- Click the **Select** button on the command bar (Fig 72 **B**).

The "Picking" screen, described in section 8, opens, enabling to record the resources picking. On this screen, the name of the selected cost center is visible under the screen header (Fig 73).

See section 8 for the resources picking procedure.

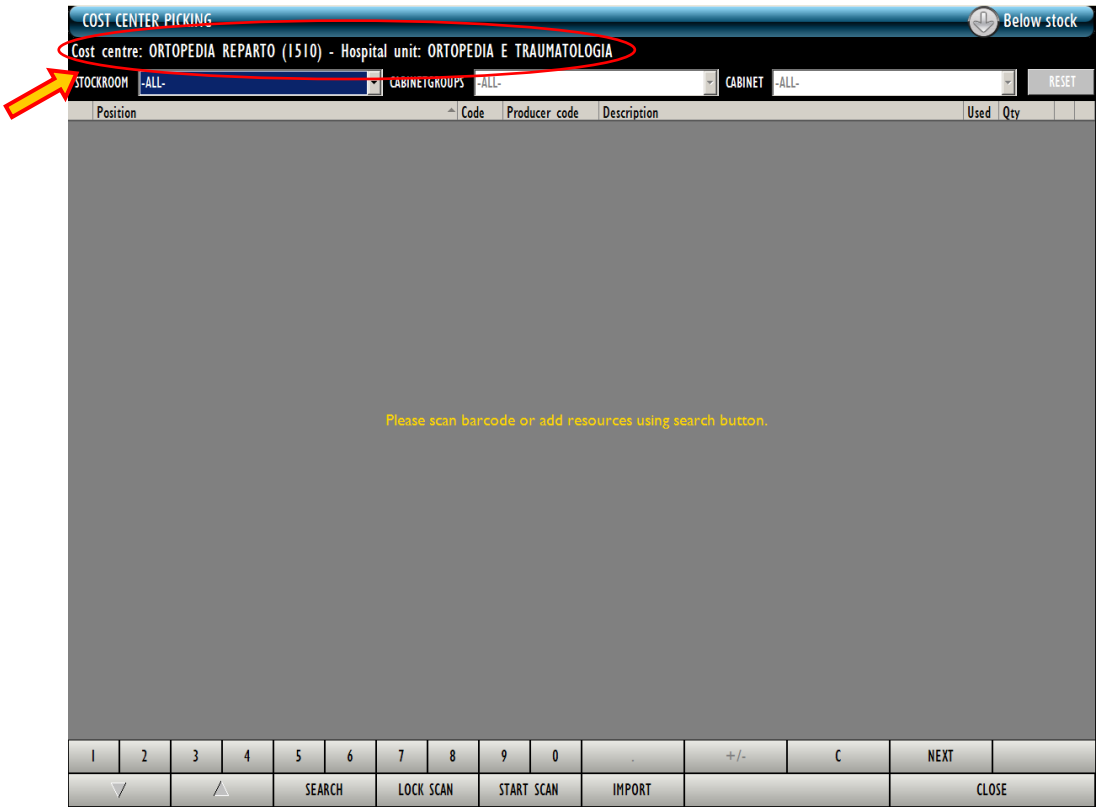


Fig 73 - "Picking" screen with cost center specification

7.2.1. "Recent" cost centers

The bar indicated in Fig 74 is formed of five buttons displaying the five most recent cost center selections.

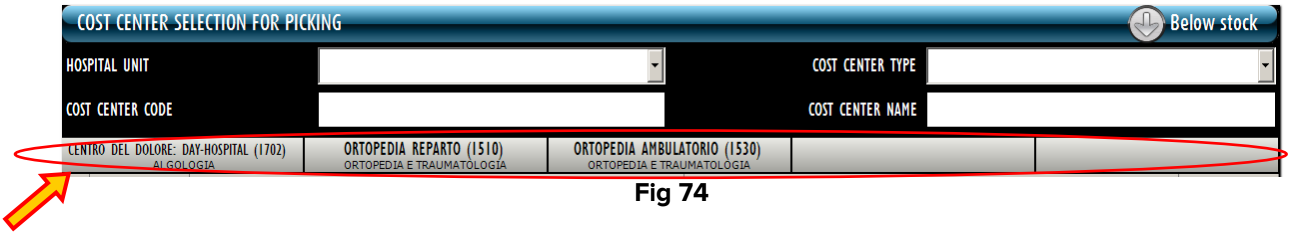


Fig 74

To select one of those cost centers again

- Click the corresponding button.

The "Picking" module screen (section 8), opens, displaying the name of the chosen cost center (Fig 73).

8. Resource picking

The “Picking” module can be used to record the picking of a resource. 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.
The resource picking is therefore enabled only after cost center selection. The procedure described in section 8.3 (resource selection) is activated after the procedure described in section 7.2 (cost center for picking selection).

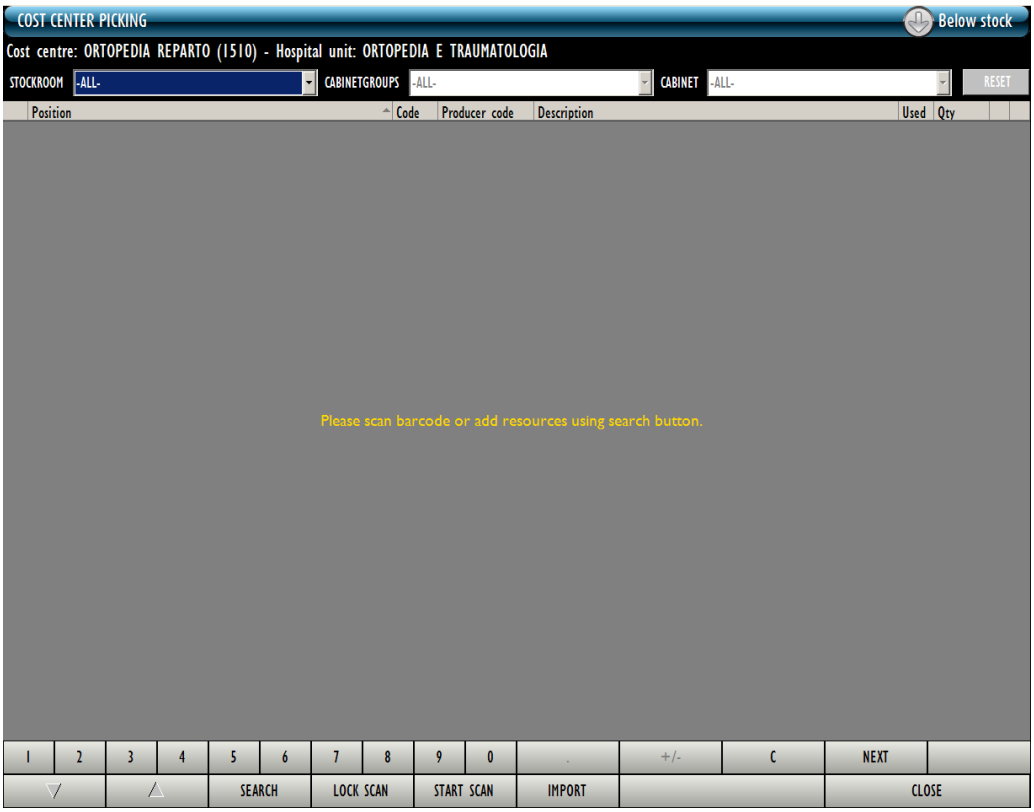


Fig 75 - Picking screen with cost center specification

The screen shown in Fig 75 is described in section 8.1.
The related procedures are described in section 8.2 (data editing), 8.3 (picking recording) and 8.4 (barcode picking recording).

8.1. “Picking” screen description

8.1.1. Filters

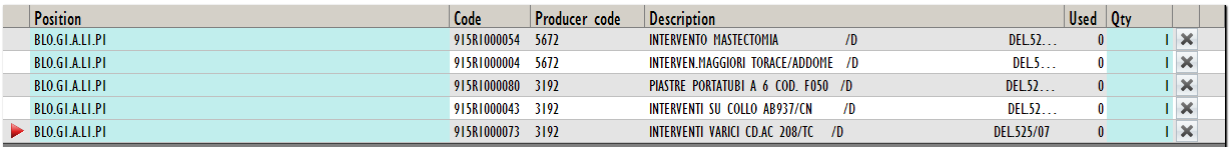
Fig 76 - Filters on the “Resources picking” screen

The filters available on the “Resources picking” screen (Fig 76) are:

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

8.1.2. Data area

The different resources are listed on screen in the way shown in Fig 77.



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 77

For each resource the following data can be displayed:

- resource position;
- resource code;
- manufacturer code (read only);
- description (read only);
- the lot (if available);
- the expiration date (if available);
- the serial number (if available);
- used resource quantity;
- quantity of resources to be picked.

The 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 picking procedure is stopped. The user is warned (Fig 78).

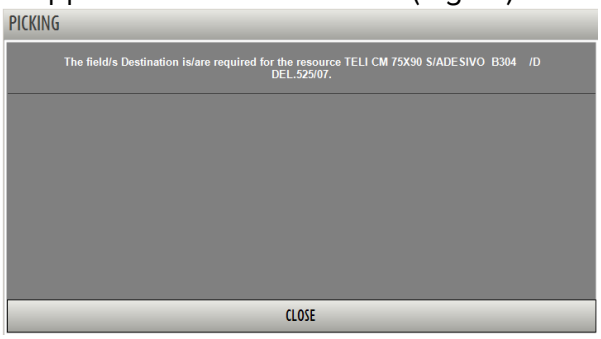


Fig 78

The kind of mandatory information for a resource depends on the resource configuration. When mandatory information is specified the corresponding cell turns light-blue

The arrow on the left indicates the selected resource.

The icon on the right cancels the resource.

When the icon is clicked the row changes in the way shown in Fig 79.

Fig 79 - Cancelled resource

When the screen is updated these rows are not considered as picked resources. This functionality allows to rapidly remove items from the picked resources list.

The icon is an “Undo” button.

8.1.3. The “resource picking” screen command bar

The command bar (Fig 80) is formed of buttons triggering different funtionalities. This section briefly describes these functionalities, referring to successive sections if more detailed instructions on a specific functionality are required.

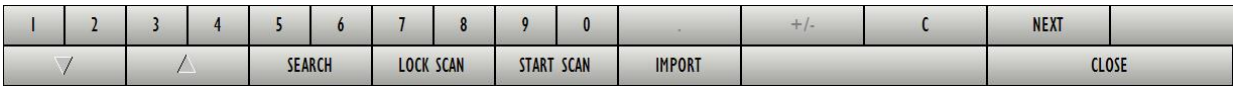


Fig 80 - Command bar

The buttons in the upper row allow to manage the numeric data.

Fig 81 - Numeric buttons

Upper row

Use the numeric buttons (Fig 81) 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 makes sense.

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

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

Lower row

Use the arrow button to scroll up and down the screen contents.

Use the **Search** button to search the resources matching the filters specified.

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

Use the **Start Scan** button to start reading of numerous barcodes that will be recorded later, all at the same time. See section 8.4.2 for the instructions relating to this procedure.

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

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

Click **Update** to save.
Click **Cancel** to discard the changes.

8.2. Resource data editing

Some of the resource data can be edited. To edit the resource data:

- Click the relevant field.

The button is displayed in the field (Fig 82 **A**).

- Click the button.

A menu containing the possible options opens (Fig 82 **B**).

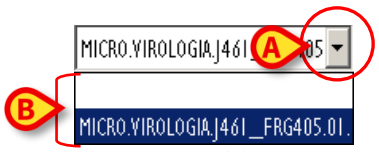


Fig 82

- Click the wanted option.

The option is displayed in the field.

The available options on the different menus depend on the context. Selecting an option affects the available choices in the other fields.

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 83 **A**).

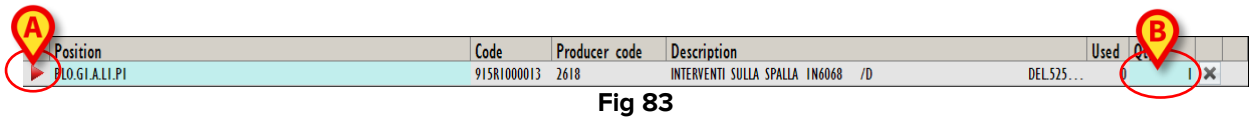


Fig 83

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

8.3. How to record the resource picking

The resource picking can be recorded either manually or using a barcode reader.

Barcode technology is recommended when selecting an item. Scanning the item's barcode, instead of selecting it manually, statistically reduces 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 84).

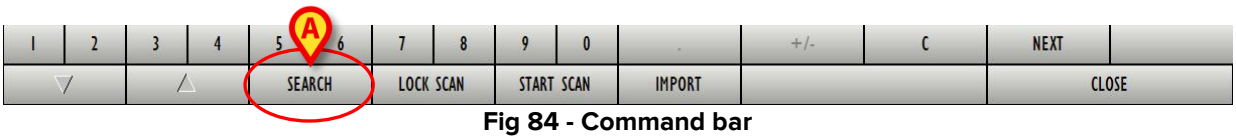


Fig 84 - Command bar

The "Search" screen opens (Fig 85). The screen is described in section 22.

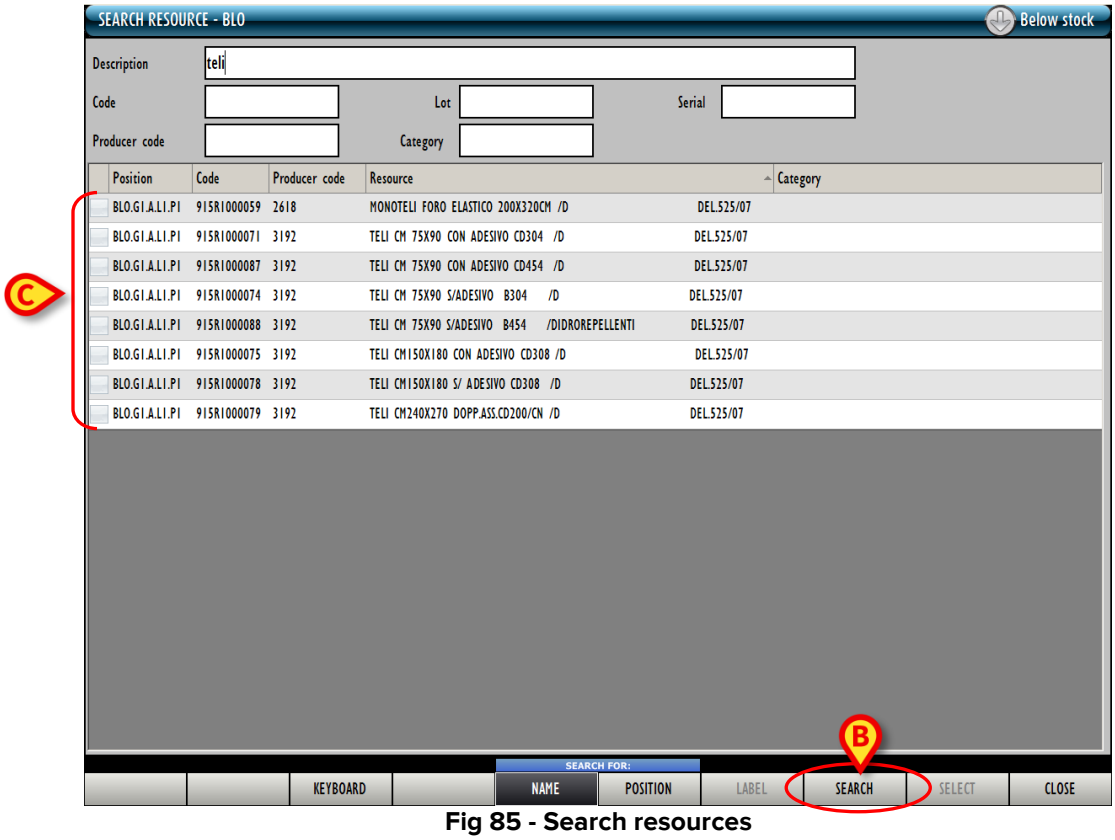


Fig 85 - Search resources

- Insert the available information on the resource in the search fields (Fig 85 **A**).
- Click the **Search** button on the command bar (Fig 85 **B**).

The list of resources matching the information specified is displayed on screen (Fig 85 **C**).

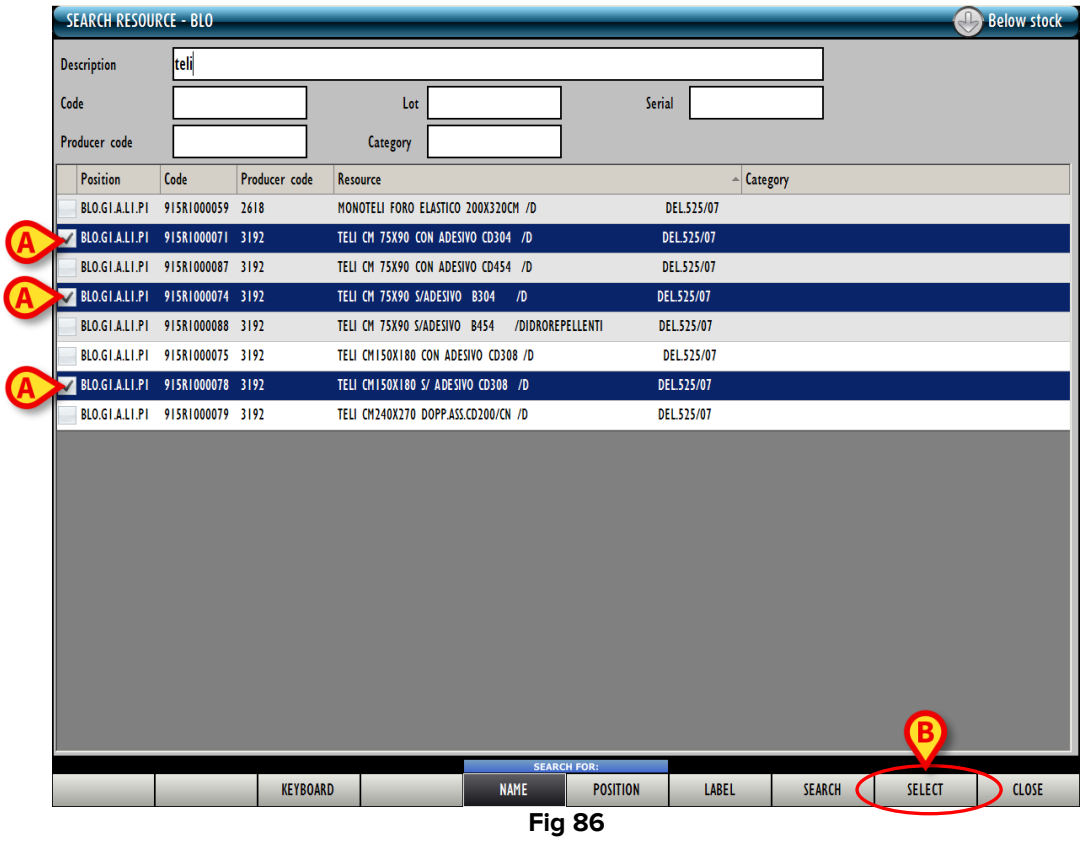


Fig 86

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

The corresponding row/s is/are highlighted (Fig 86 **A**).

- Click the **Select** button on the command bar (Fig 86 **B**).

The selected resource/s is displayed in the “materials transfer” screen (Fig 86 **A**).

Double click an item to display it directly.

Fig 87

- Edit, if necessary, the values of the inserted resource (lot, quantity, etc... see section 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 section describes the procedures related to this functionality.

To record the resource picking using barcode reader, when the “Resource picking” screen is displayed (Fig 87),

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

A row corresponding to the resource is displayed.

If a pink row is displayed, that means that the barcode refers to a resource that is not in the cabinets selected as “source” (Fig 88).

Fig 88

8.4.1. Lock scan

The **Lock Scan** button on the command bar (Fig 89) makes it possible to lock the workstation while the user is away to scan barcodes that will be downloaded later. A wireless barcode reader is required.

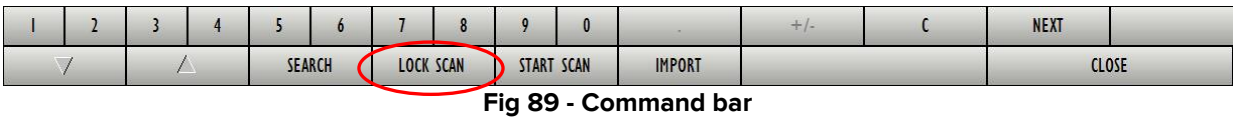


Fig 89 - Command bar

- Click the **Lock Scan** button.

The button is displayed as selected:

. The button remains selected while the workstation is locked. The following window is displayed (Fig 90).

Fig 90

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

After barcode reading, return to the workstation.

- Insert the user password in the field indicated in Fig 90 **A**.

- Click **Continue** (Fig 90 **B**).

The workstation is unlocked. The rows corresponding to the read barcodes are displayed. The **Keyboard** button on the window opens a virtual keyboard that can be used to insert data (Fig 91).

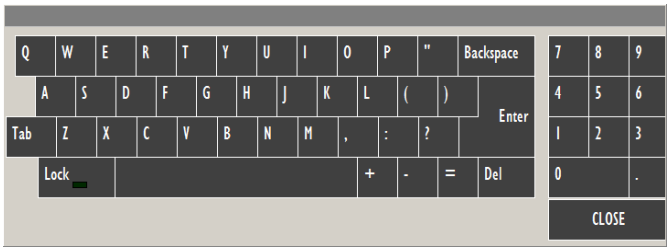


Fig 91 - Virtual keyboard

8.4.1.1. How to force the workstation unlocking

The workstation can be unlocked by another user if they have adequate permissions.
To force the workstation unlocking

- Click “Advanced options” on the “Enter password” window (Fig 92 **A**).

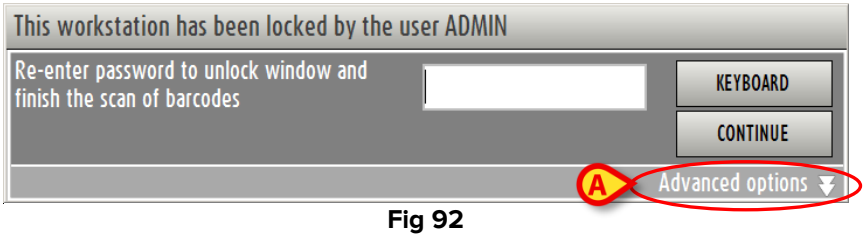


Fig 92

The window changes in the following way (Fig 93).

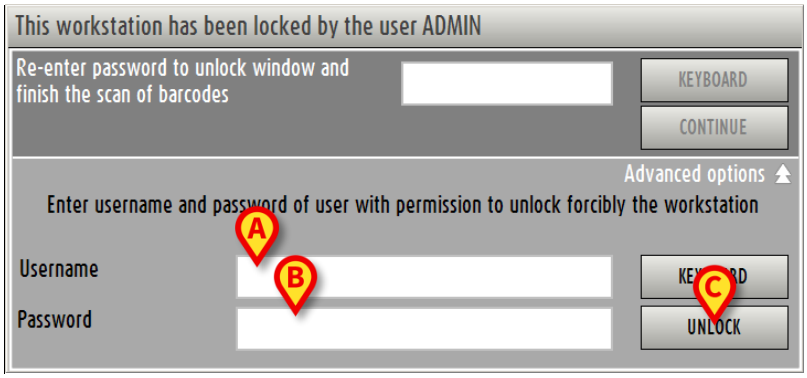


Fig 93 - Advanced options

- Insert the username of the new user in the “Username” field (Fig 93 **A**).
- Insert the password of the new user in the “Password” field (Fig 93 **B**).
- Click the **Unlock** button (Fig 93 **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 94) allows to read numerous barcodes that will be downloaded later.

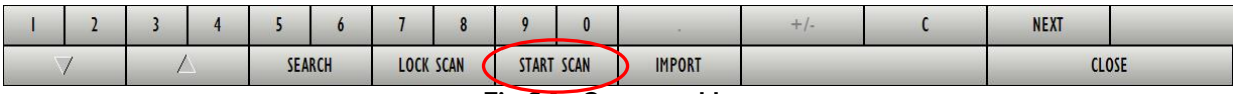


Fig 94 - Command bar

- Click the **Start Scan** button.

The button changes to **Stop Scan**. A pop-up window informs the user that barcode reading can start. The user is logged out. The following advice is displayed on top "Press STOP SCAN to import scanned products".

Fig 95

- Scan the barcodes.

After barcode reading, to import the data of the scanned resources:

- 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 are displayed.

8.4.3. Import

The **Import** button on the command bar (Fig 96) makes it possible to import the data read with a wireless barcode reader having internal memory.

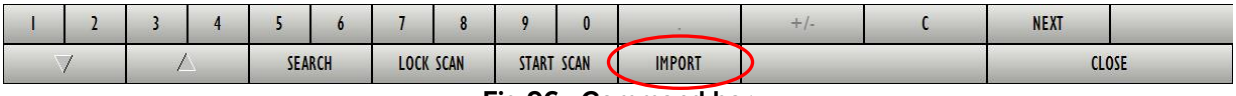


Fig 96 - Command bar

- Scan the barcodes using the appropriately configured devices.
- Click the **Import** button.

The import status is notified.

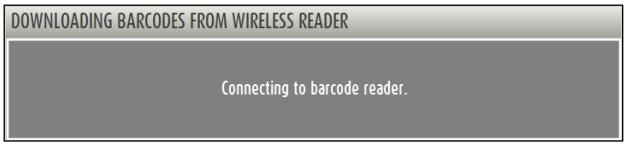


Fig 97

When done, the rows corresponding to the imported resources are displayed.

9. Cost center selection for return

This module allows to record the returned resources and to attribute them 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 98).

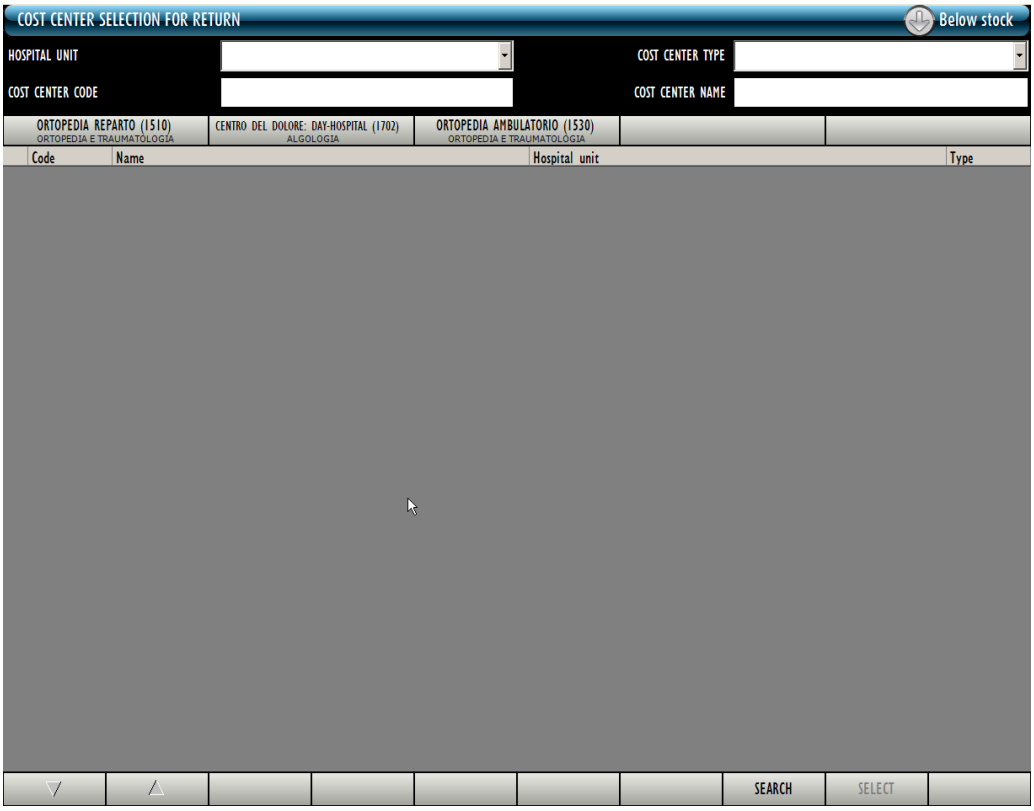


Fig 98 - Cost center for returns

Section 9.1 describes the screen shown in Fig 98.
Section 9.2 describes the cost center selection procedure.

9.1. Cost Center - screen structure

The “Cost Center” screen is structured as described in section 1.4. See section 1.4 for a description of the screen general features. This section describes the screen specific features.
An additional button bar is here available, displaying the recent selections and allowing the quick selection of cost centers selected before (Fig 105).

9.1.1. Filters

Fig 99 - Filters on the “Cost center selection” screen

The available filters on the “Cost center for returns” screen (Fig 99) 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.

9.1.2. Data area

The data area lists the cost centers matching the features specified in the filters (In Fig 100 the “Ortopedia e Traumatologia” Hospital Unit is specified as filter).

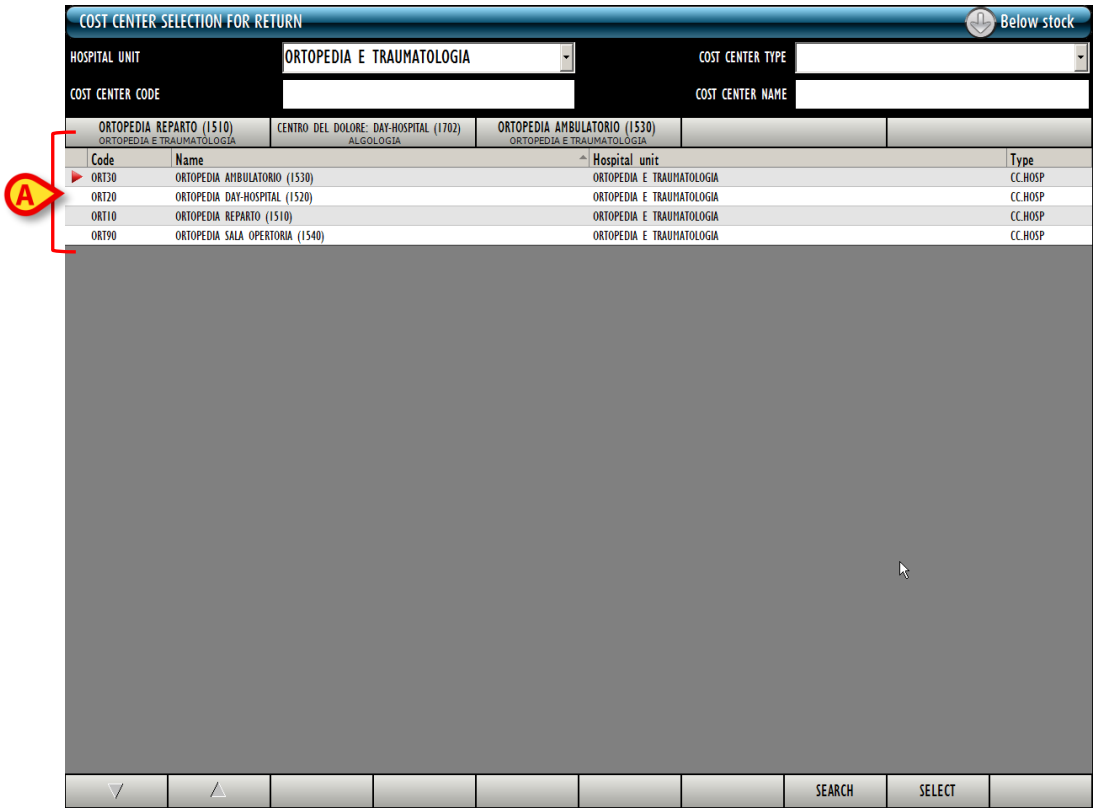


Fig 100 - Cost centers for returns

Each row corresponds to a cost center. For each cost center the following information can be displayed, all read-only.
:

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

The ▶ arrow displayed on the left indicates the selected cost center.

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

This section describes the buttons on the command bar (Fig 101).

Fig 101 - Command bar

Use the arrow buttonsto scroll up and down the screen contents.

Use the **Search** button to search and display the list of items matching the filters specified.
Use the **Select** button to select the cost center to which the return will be attributed.

9.2. Cost center for return selection

To select the Cost Center for a returned resource:

- Click the

icon on the lateral bar to access the cost center selection screen (Fig 102).

Fig 102 - Cost center for return attribution

- Specify in the filters the available cost center data. In Fig 102 **A** the “Allergologia” Hospital Unit is specified.
- Click the **Search** button on the command bar (Fig 102 **B**).

The list of cost centers matching the filters is displayed (Fig 103 **A**).

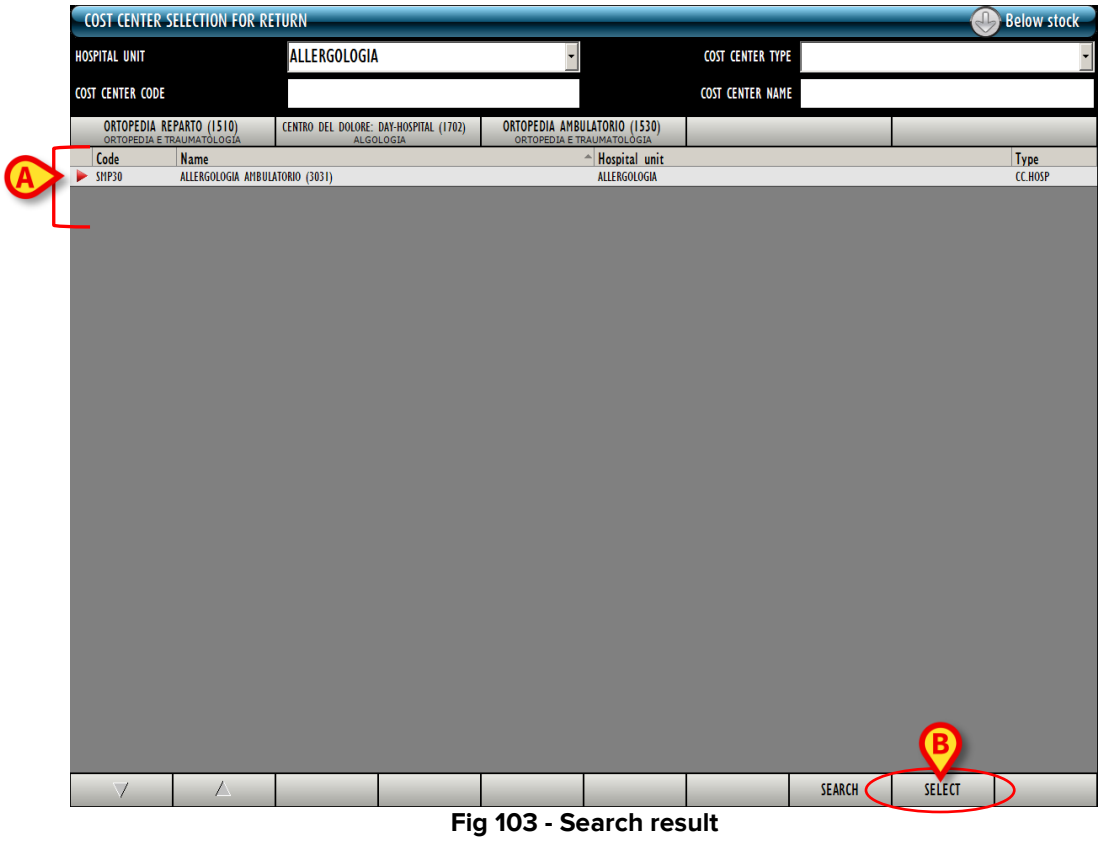


Fig 103 - Search result

- Click the row corresponding to the relevant cost center.

The ▶ arrow is displayed on the left.

- Click the **Select** button on the command bar (Fig 103 **B**).

The screen allowing to record the returned resources opens ("Cost center for returns" - Fig 104). The screen is described in section 9.3.
Section 9.4 describes the returned resouces selection procedure.

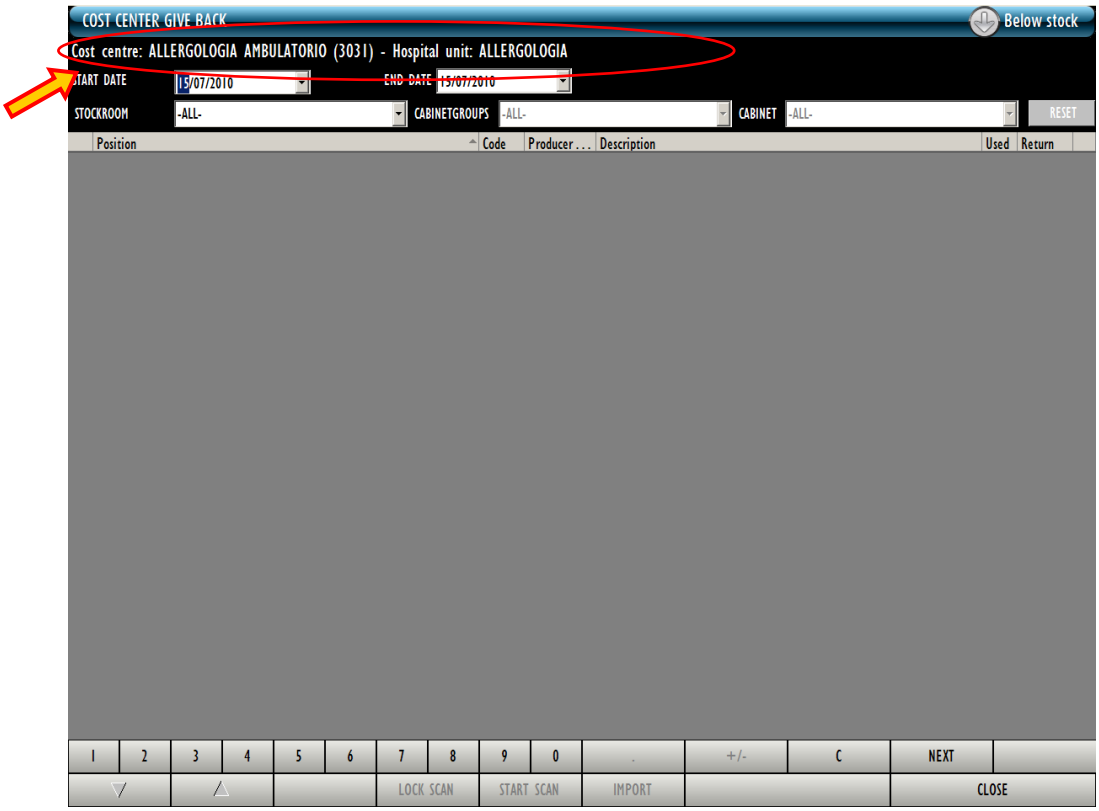


Fig 104 - Cost center for returns screen

9.2.1. “Recent” cost centers

The bar indicated in Fig 105 displays the five most recently selected cost centers.

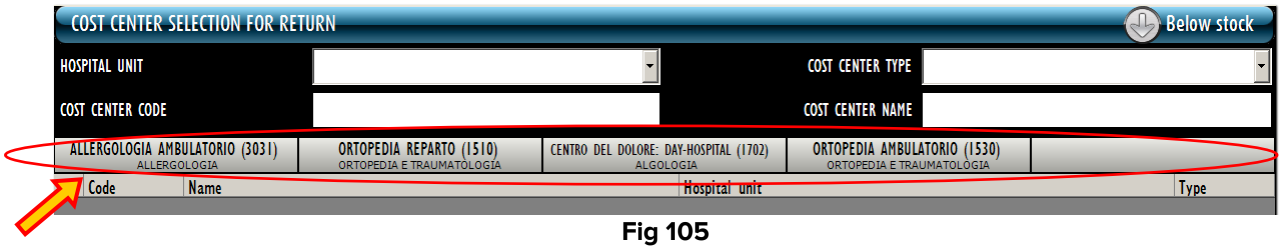


Fig 105

To select one of those cost centers again

- Click the corresponding button.

The screen shown in Fig 104 opens, indicating the name of the chosen cost center.

9.3. “Cost center for returns” screen description

The “Cost Center for returns” screen is structured as described in section 1.4. See section 1.4 for a description of the screen general features. This section describes the screen specific features.

9.3.1. Filters

Fig 106 - Filters on the “Cost center for returns” screen

The available filters on this screen are:

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

9.3.2. Data area

The “Cost center for returns” screen displays all the resources picked for the selected cost center in the period defined by the “Start date” and “End date” (Fig 107).

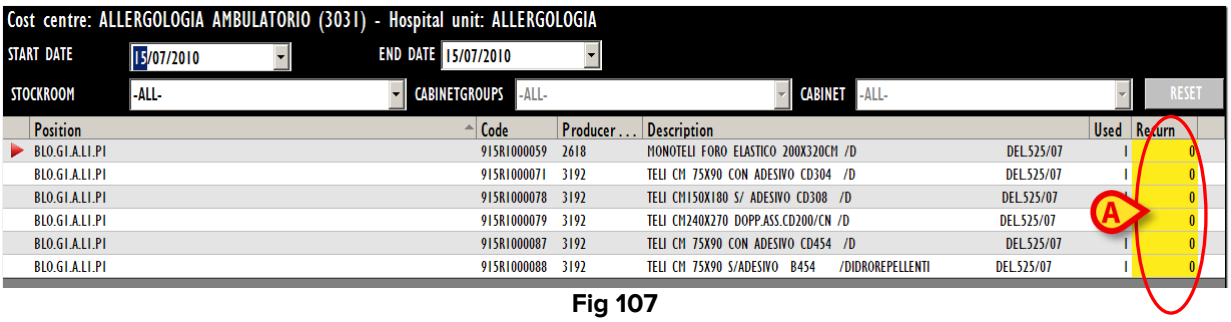


Fig 107

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

- resource position (read only);
- resource code (read only);
- manufacturer code (read only);
- description (read only);
- picked quantity (read only);
- quantity to be returned.

The arrow on the left indicates the selected resource. The only editable value on this screen is the quantity of items that must be returned. The relevant cell is highlighted yellow if no value is displayed (Fig 107 **A**). When a value is specified, before clicking the **Update** button on the command bar, the cell is highlighted light blue (Fig 108).

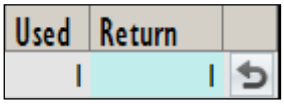


Fig 108

The icon is an “Undo” button.

9.3.3. The “Cost center for returns” screen command bar

The command bar of the “Cost center for returns” screen is shown in Fig 109.

Fig 109

Use either the numeric buttons on the command bar (Fig 110) or the workstation keyboard to specify the quantities to be returned.

Fig 110 - Numeric buttons

The “ **.** ” button is a decimal divider. The button is active only if decimal specification is relevant.
The “**+/-**” button change a value to negative / 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 buttonsto scroll up and down the screen contents.

The other buttons are not active on this screen.

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

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

Click **Update** to save.

Click **Cancel** to annul.

9.4. How to record a “Return”

To record a returned resource, on the “Cost center for return” screen (Fig 104).

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

The row is selected, the icon is displayed on the left.

- Specify the resource quantity.
- Click **Update**.

After clicking **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 equals the quantity of picked items, the row disappears.

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 displays the corresponding row on top of the list of resources displayed on screen. The quantity is increased (one unit).

- Click **Update** to save.

10. Resources allocation

The “Resources allocation” module manages the changes in the way the resources are located and stored.
In Digistat® Stock Management each cabinet is configured to contain only specific resources (and not others). That means that a certain actual resource can be stored in certain cabinets and not in others. The “Resources allocation” module allows to change the structure of the allocation of the resources.
I.e. this module records, for a resource, that the possibility of being located in a certain cabinet is moved to another cabinet. Cabinet configuration changes.

A change recorded on this module moves all the items of a resource from a source cabinet to a destination cabinet.

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

To select the module

- Click the icon

on the lateral bar.

The following screen opens (Fig 111):

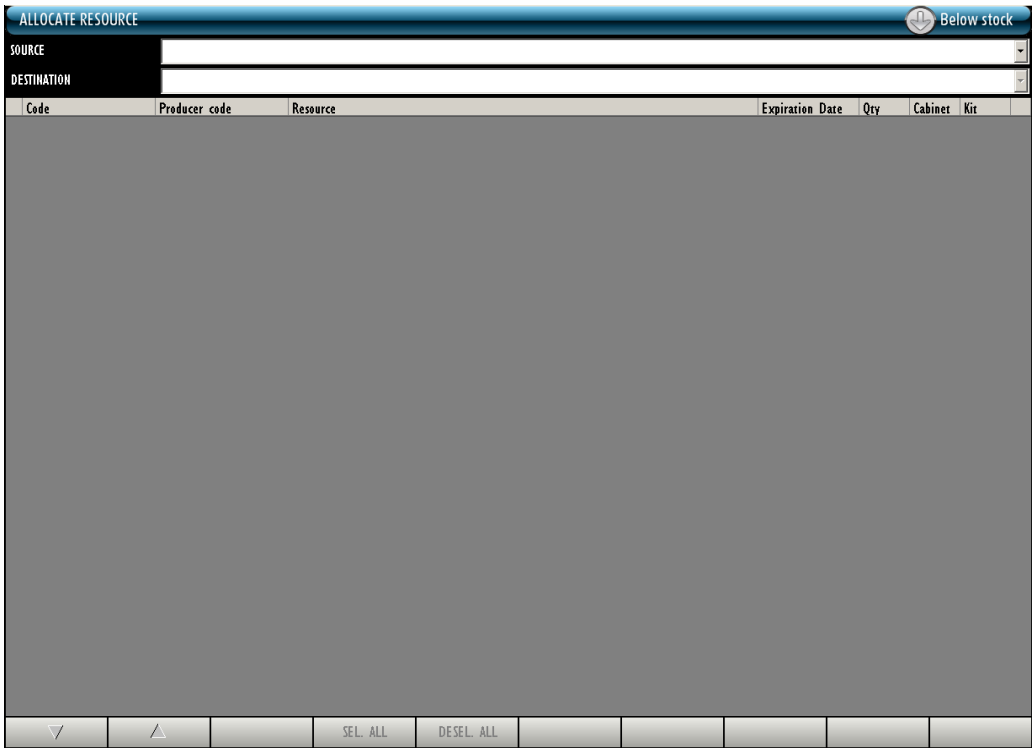


Fig 111 - Resources allocation

10.1. Resources allocation - screen structure

The “Resources allocation” screen is structured as described in section 1.4. See section 1.4 for a description of the screen general features. This section describes the screen specific features.

10.1.1. Source and destination specification

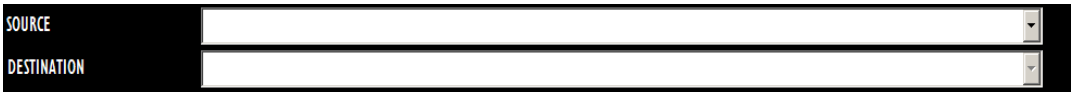


Fig 112 - Filters on the “Resources allocation” screen

The filters available on the “Resources allocation” screen (Fig 112) are:

- “Source” - Selects the source cabinet.
- “Destination” - Selects the destination cabinet.

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 113 **A**).

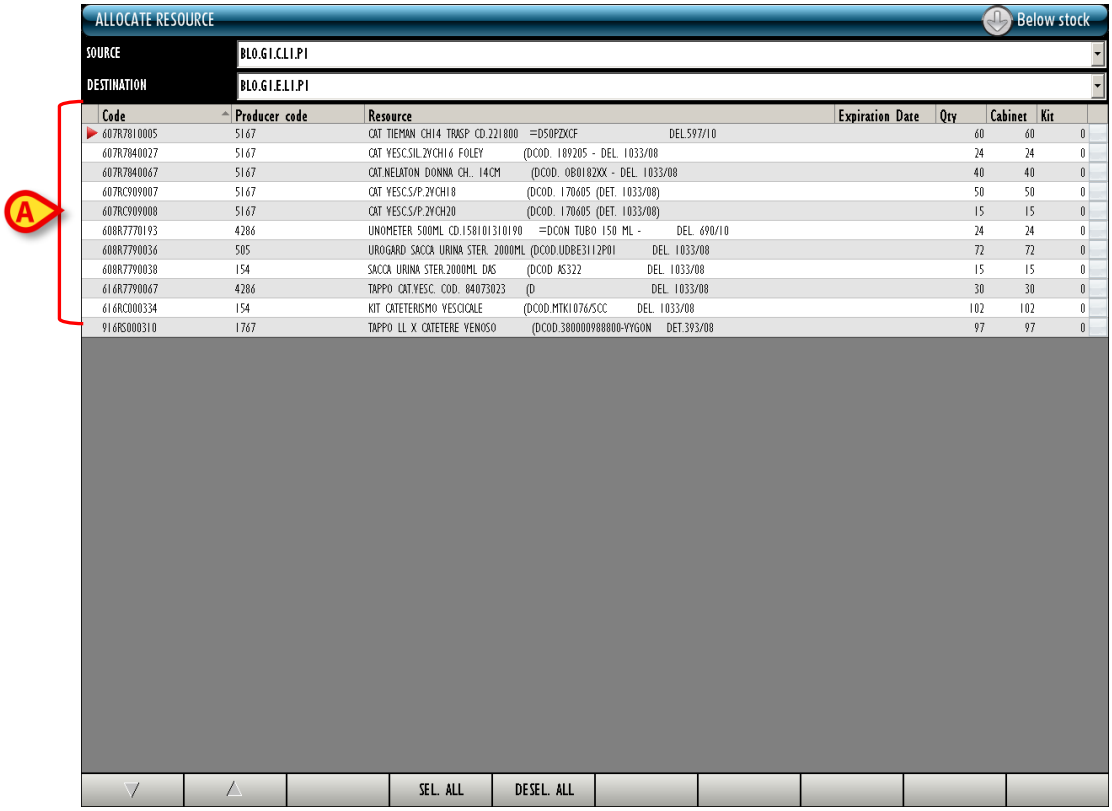


Fig 113 - Resources allocation

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

- resource code (read only);
- manufacturer code (read only);
- resource description (read only);
- total quantity in stock (read only);
- quantity located in the cabinets (read only);
- quantity located in the generic kits already prepared (read only).

The checkboxes on the right (Fig 114 **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	

Fig 114

The ▶ arrow displayed on the left indicates that the correponding resource is selected.
When the quantity in stock for a resource is less than the configured minimum quantity, the corresponding cell is highlighted red; when the quantity in stock for a resource is less than the configured ideal quantity the corresponding cell is highlighted yellow.

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

The command bar is shown in Fig 115.

▽	△		SEL. ALL	DESEL. ALL					

Fig 115 - Command bar

The numeric buttons on the upper row are not enabled.
Use the arrow-buttons, when active, to scroll the screen contents up and down.
The **Sel. All** button selects all the items displayed.
The **Desel. All** button deselects all the selected items.

When editing data, the **Update** and **Cancel** buttons are displayed on the command bar.
Clck **Update** to save.
Click **Cancel** to annul.

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 116).

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

The following screen opens.

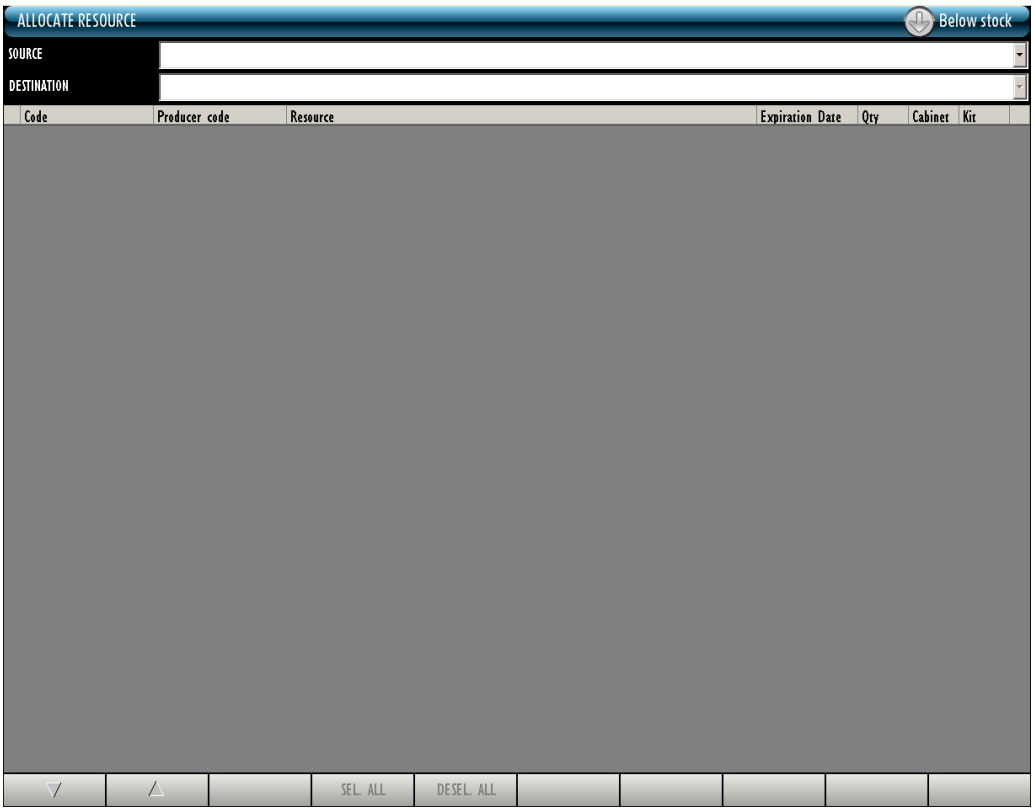


Fig 116 - Resources allocation

- Select the source cabinet (specify the “Source” field, Fig 117 **A**).
- Select the destination cabinet (specify the “Destination” field, Fig 117 **B**).

The data area displays the list of resources that can be reallocated (Fig 117 **C**).

Fig 117

- Click, on the right, the boxes corresponding to the resources that must be reallocated (Fig 118 **A**). The clicked boxes are selected - ✔ - .

Fig 118

- Click the **Update** button on the command bar (Fig 118 **B**).

The reallocation is this way completed.

A print report is automatically created. A print preview is displayed (Fig 119).

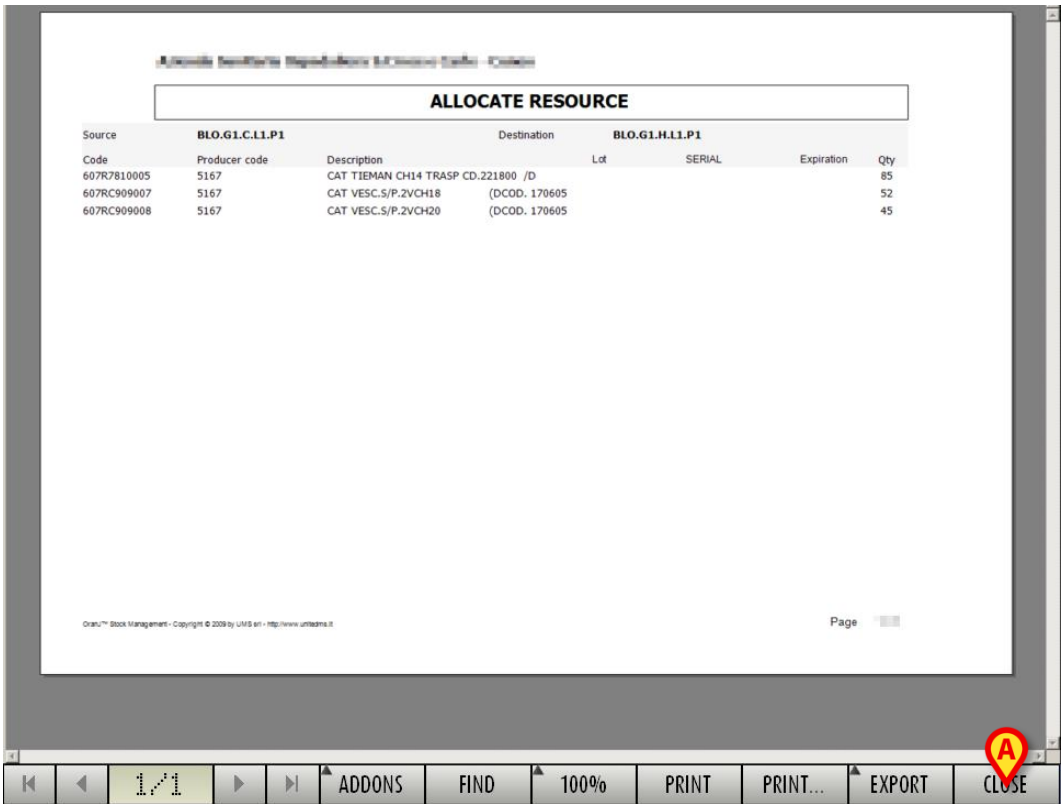


Fig 119 - Print preview

The **Close** button (Fig 119 **A**) closes the “Print preview” screen.

11. Orders sheet print

The “Orders” module enables to create and print the “Orders sheet”.
To activate the “Orders” module:

- Click the icon on the lateral bar. The following screen opens,

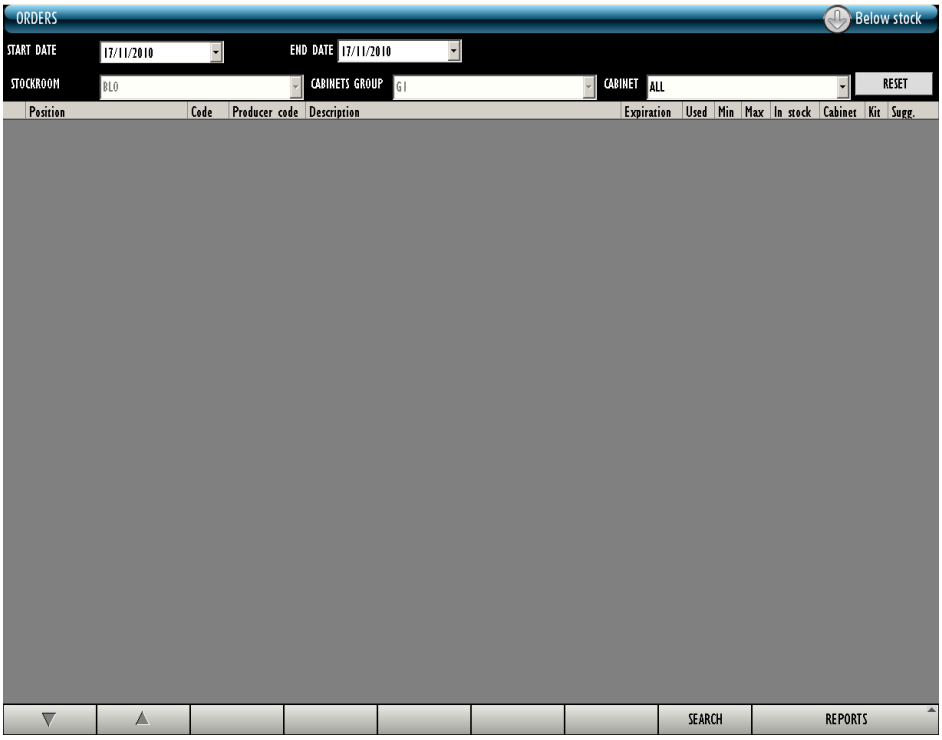


Fig 120 – Orders

11.1. “Orders” - screen structure

The “Orders” screen is structured as described in section 1.4. See section 1.4 for a description of the screen general features. This section describes the screen specific features.

11.1.1. Filters

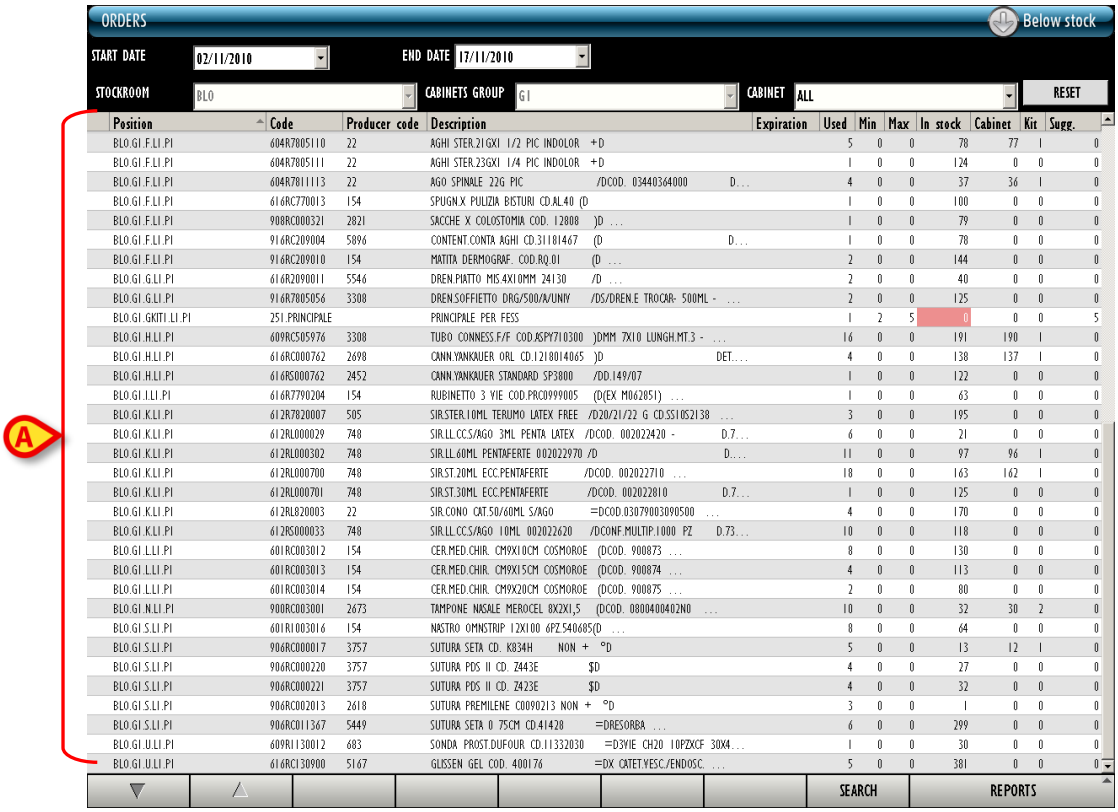
Fig 121 - Filters on the “Orders” screen

The available filters on the “Orders” screen (Fig 121) are:

- “Start date - End date” - specify the relevant time period.
- “Stockroom” - display only the resources located in a specific stockroom.
- “Cabinets group” - display only the resources located in a specific cabinets group.
- “Cabinet” - display only the resources located in a specific cabinet.

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 match those specified in the other filters.



Position	Code	Producer code	Description	Expiration	Used	Min	Max	In stock	Cabinet	Kit	Sugg.
BL0.G1.F.L1.P1	604R7805110	22	AGHI STER.21GXI 1/2 PIC INDOLOR +D		5	0	0	78	77	1	0
BL0.G1.F.L1.P1	604R7805111	22	AGHI STER.23GXI 1/4 PIC INDOLOR +D		1	0	0	124	0	0	0
BL0.G1.F.L1.P1	604R7811113	22	AGO SPINALE 22G PIC /DCOD. 03440364000 D...		4	0	0	37	36	1	0
BL0.G1.F.L1.P1	616RC770013	154	SPUGN.X PULIZIA BISTURI CD.AL40 (D		1	0	0	100	0	0	0
BL0.G1.F.L1.P1	908RC000321	2821	SACCHE X COLOSTOMIA COD. 12808)D ...		1	0	0	79	0	0	0
BL0.G1.F.L1.P1	916RC209004	5896	CONTENT.CONTA AGHI CD.31181467 (D D...		1	0	0	78	0	0	0
BL0.G1.F.L1.P1	916RC209010	154	MATITA DERMOGRAF. COD.RQ.01 (D ...		2	0	0	144	0	0	0
BL0.G1.G.L1.P1	616R209001 1	5546	DREN.PIATTO MIS.4X10MM 24130 /D ...		2	0	0	40	0	0	0
BL0.G1.G.L1.P1	916R7805056	3308	DREN.SOFFIETTO DRG/500/A/UNIV /DS/DREN.E TROCAR- 500ML - ...		2	0	0	125	0	0	0
BL0.G1.GKITI.L1.P1	251.PRINCIPALE		PRINCIPALE PER FESS		1	2	5	0	0	0	5
BL0.G1.H.L1.P1	609RC505976	3308	TUBO CONNESS.F/F COD.ASPY710300)DMM 7X10 LUNGH.MT.3 - ...		16	0	0	191	190	1	0
BL0.G1.H.L1.P1	616RC000762	2698	CANN.YANKAUER ORL CD.12180014065)D DET....		4	0	0	138	137	1	0
BL0.G1.H.L1.P1	616RS000762	2452	CANN.YANKAUER STANDARD SP3800 /DD.149/07		1	0	0	122	0	0	0
BL0.G1.I.L1.P1	616R7790204	154	RUBINETTO 3 VIE COD.PRC01999005 (D(EX M062051) ...		1	0	0	63	0	0	0
BL0.G1.K.L1.P1	612R7820007	505	SIR.STER.10ML TERUMO LATEX FREE /D20/21/22 G CD.SS10S2138 ...		3	0	0	195	0	0	0
BL0.G1.K.L1.P1	612RL000029	748	SIR.LL.CC.S/AGO 3ML PENTA LATEX /DCOD. 002022420 - D.7...		6	0	0	21	0	0	0
BL0.G1.K.L1.P1	612RL000302	748	SIR.LL.60ML PENTAFERTE 002022970 /D D....		11	0	0	97	96	1	0
BL0.G1.K.L1.P1	612RL000700	748	SIR.ST.20ML ECC.PENTAFERTE /DCOD. 002022710 ...		18	0	0	163	162	1	0
BL0.G1.K.L1.P1	612RL000701	748	SIR.ST.30ML ECC.PENTAFERTE /DCOD. 002022810 D.7...		1	0	0	125	0	0	0
BL0.G1.K.L1.P1	612RL820003	22	SIR.CONO CAT.50/60ML S/AGO =DCOD.03079003090500 ...		4	0	0	170	0	0	0
BL0.G1.K.L1.P1	612RS000033	748	SIR.LL.CC.S/AGO 10ML 002022620 /DCONF.MULTIP.1000 PZ D.73...		10	0	0	118	0	0	0
BL0.G1.L.L1.P1	601RC003012	154	CER.MED.CHIR. CM9X10CM COSMOROE (DCOD. 900873 ...		8	0	0	130	0	0	0
BL0.G1.L.L1.P1	601RC003013	154	CER.MED.CHIR. CM9X15CM COSMOROE (DCOD. 900874 ...		4	0	0	113	0	0	0
BL0.G1.L.L1.P1	601RC003014	154	CER.MED.CHIR. CM9X20CM COSMOROE (DCOD. 900875 ...		2	0	0	80	0	0	0
BL0.G1.N.L1.P1	908RC003001	2673	TAMPONE NASALE MEROCEL 8X2X1,5 (DCOD. 0800400402N0 ...		10	0	0	32	30	2	0
BL0.G1.S.L1.P1	601RI003016	154	NASTRO OMNSTRIP 12X100 6PZ.540685(D ...		8	0	0	64	0	0	0
BL0.G1.S.L1.P1	906RC000017	3757	SUTURA SETA CD. K834H NON + °D		5	0	0	13	12	1	0
BL0.G1.S.L1.P1	906RC000220	3757	SUTURA PDS II CD. Z443E $D		4	0	0	27	0	0	0
BL0.G1.S.L1.P1	906RC000221	3757	SUTURA PDS II CD. Z423E $D		4	0	0	32	0	0	0
BL0.G1.S.L1.P1	906RC002013	2618	SUTURA PREMILENE C0090213 NON + °D		3	0	0	1	0	0	0
BL0.G1.S.L1.P1	906RC011367	5449	SUTURA SETA 0 75CM CD.41420 =DRESORBA ...		6	0	0	299	0	0	0
BL0.G1.U.L1.P1	609RI130012	683	SONDA PROST.DUFOUR CD.11332030 =D3VIE CH20 10PZXCF 30X4...		1	0	0	30	0	0	0
BL0.G1.U.L1.P1	616RC130900	5167	GLISSEN GEL COD. 400176 =DX CATET.VESC./ENDOSC. ...		5	0	0	381	0	0	0

Fig 122 - 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;
- the suggested order quantity (this is the difference between the suggested quantity and the quantity in stock).

All data is read-only.

11.1.3. The command bar of the “Orders” screen

The command bar is shown in Fig 123.

Fig 123 - Command bar

Use the arrow buttons to scroll up and down the screen contents.
se the **Search** button to display the list of items matching the available filters.
Use the **Reports** button to select and print the available print reports (defined in the configuration).

11.2. Display and print the orders sheet

To display the list of resources,

- Insert the available data in the search filters (Fig 124 **A**).

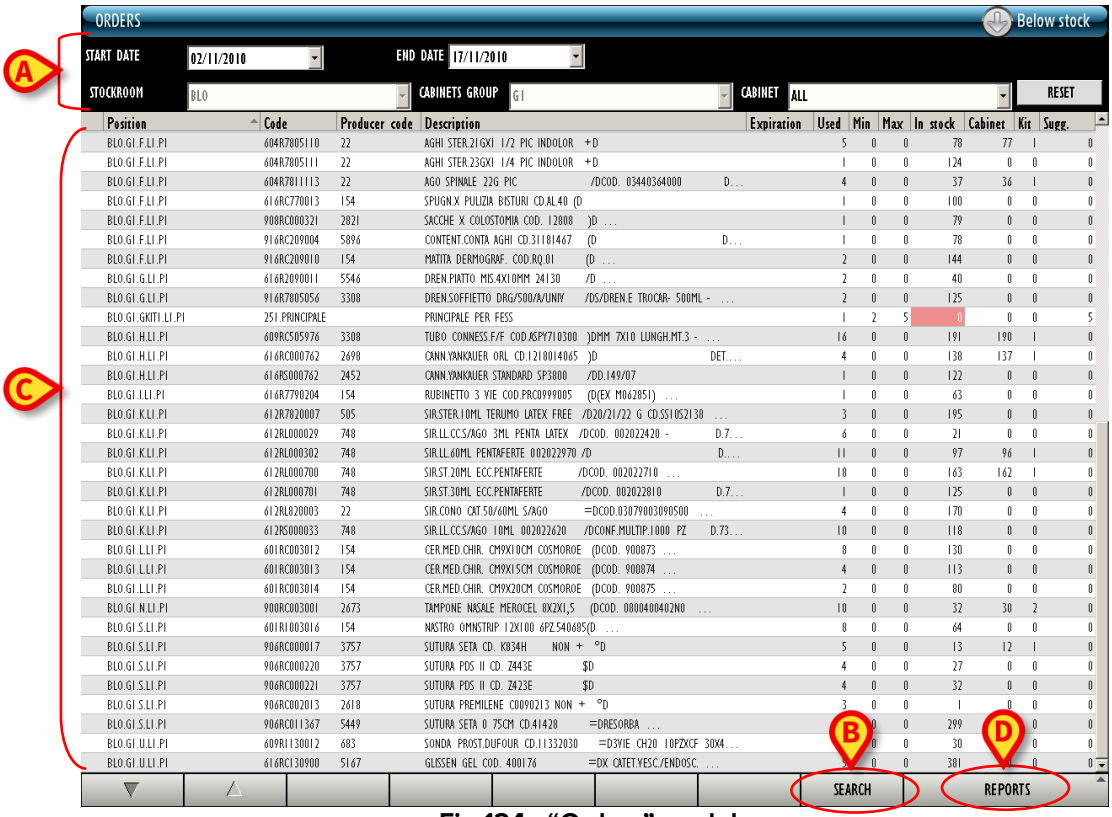


Fig 124 - “Orders” module

- Click the **Search** button on the command bar (Fig 124 **B**).

The list of resources whose features match those specified in the filters is displayed (Fig 124 **C**).

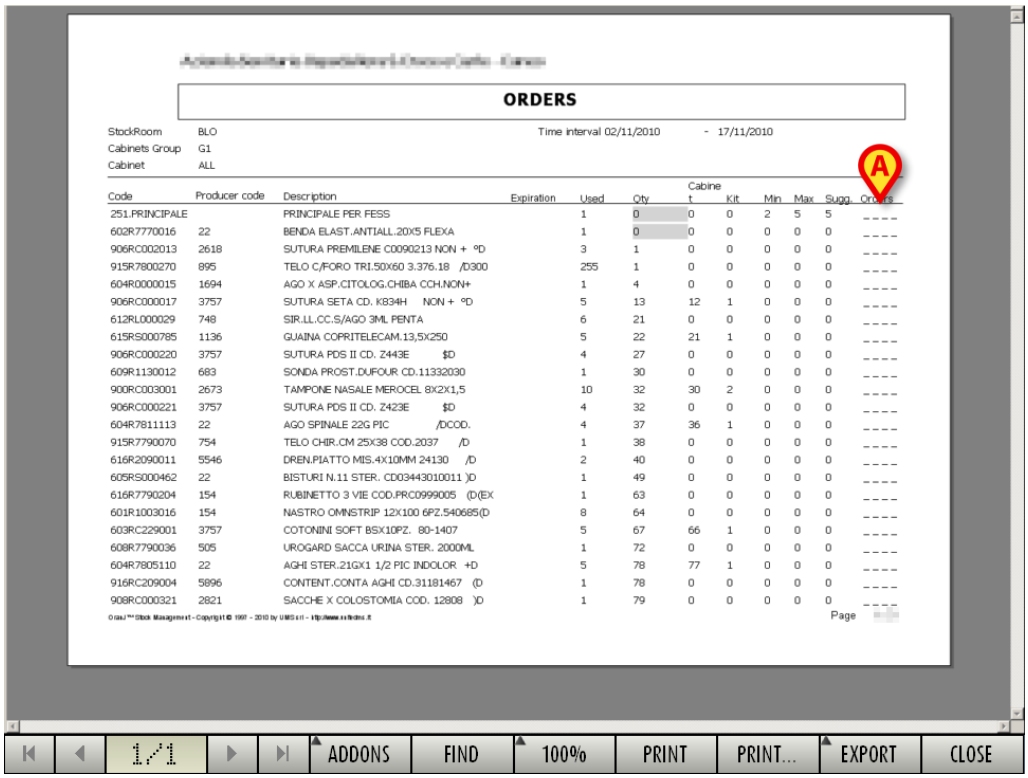
- Click the **Reports** button on the command bar (Fig 124 **D**).

The “Orders” option is active (Fig 125).

Fig 125

- Click the “Orders” option.

The print report is created. A print preview is displayed (Fig 126).



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 + ºD		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 + ºD		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 126

The last column on the right can be manually filled to specify the quantities to be ordered (Fig 126 **A**).

12. Operation attribution of returned resources

The “Returns for operation” module allows to record the returned resources (“Returns” from now on) and attribute them to a specific operation.
To select the module

- Click the corresponding icon

.

The following screen opens (Fig 127).

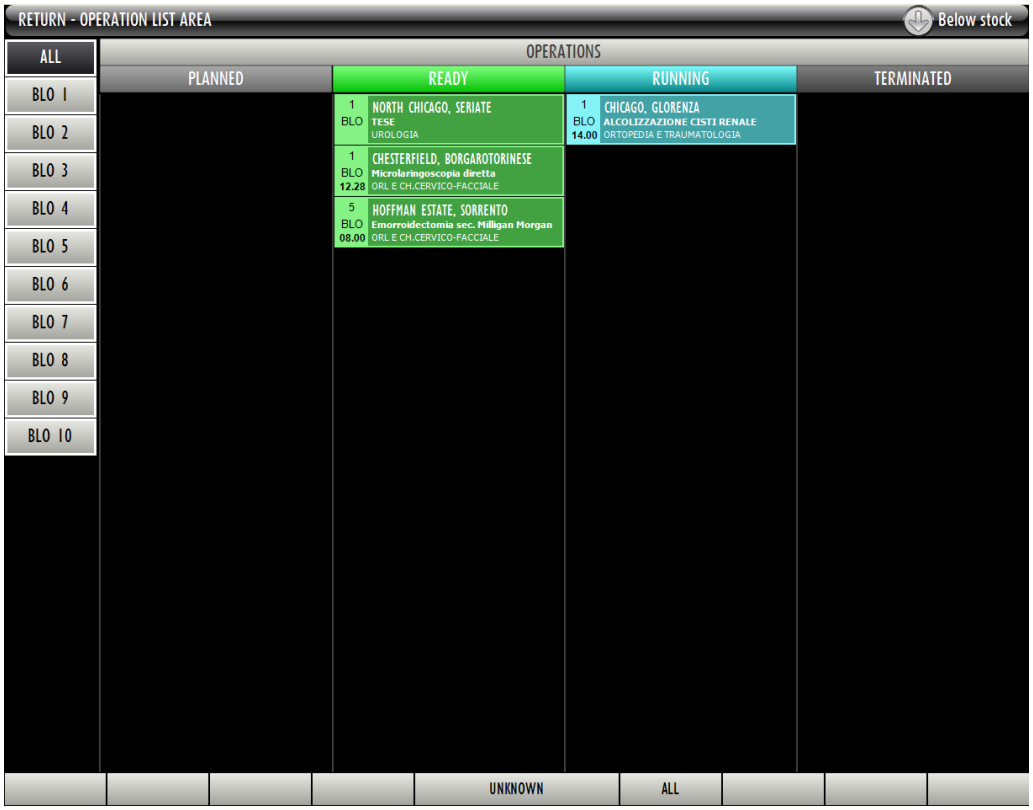


Fig 127 - Operation list

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 current configuration of Stock Management and for which there are picked resources. The operations are represented as rectangles (Fig 128).

Fig 128 - Operation rectangle

On the left of the rectangles the planned room, block and time are displayed (Fig 128 **A**).

In case of “Reserve” operations, the room and/or block and/or time are not specified. The “Reserves” are described in “USR ENG Smart Scheduler” and “USR ENG OranJ” user manuals. See these documents for more information.
The number and kind of information displayed in the operation rectangle do not affect the Stock Management procedures.

The patient name, the planned operation and the requesting hospital unit are displayed on the right of the operation rectangle (Fig 128 **B**).

The information displayed on the operation rectangle is customizable. Refer to the system administrators 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 characterized by a red border (Fig 129).

Fig 129

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 “USR ENG Smart Scheduler” and “USR ENG OranJ” user manuals. See these documents for more information.

The operation rectangles are displayed into four columns. Each column contains the operations having the same state. The state is specified in the column header (Fig 130).

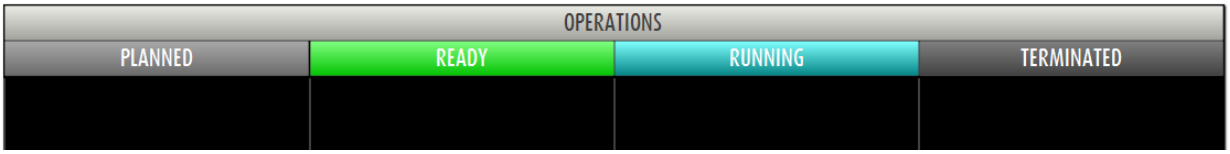


Fig 130

On the left of the screen a list of buttons makes it possible to filter the operations displayed (Fig 131).

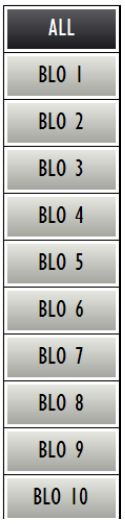


Fig 131 - Filter buttons

Each button corresponds to a room.

- Click a button to display only the operations of the corresponding room.

The clicked button is highlighted. The **All** button displays the complete list again.

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

12.2. Operation selection

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

- Click the corresponding rectangle (Fig 132).

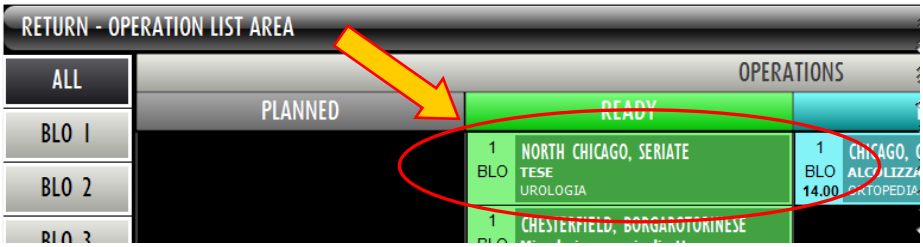


Fig 132 - Operation rectangle

The screen allowing to record the “returns” opens (Fig 133).

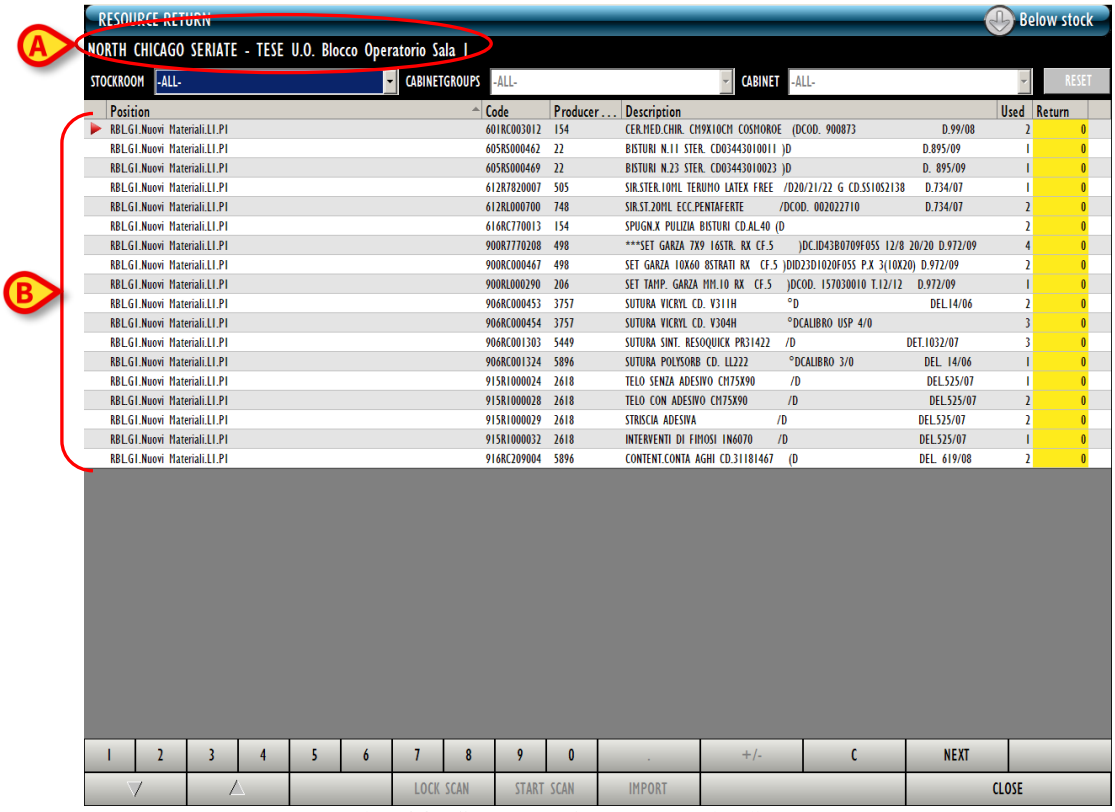


Fig 133 - “Returns from operation” screen

The data of the operation to which the “return” will be attributed are displayed on top (Fig 133 **A**).

The data area displays the list of resources picked for the selected operation (Fig 133 **B**).

12.3. “Returns from operation”: screen structure

The “Returns from operation” screen is structured as described in section 1.4. See section 1.4 for a description of the screen general features. This section describes the screen specific features.

12.3.1. Filters

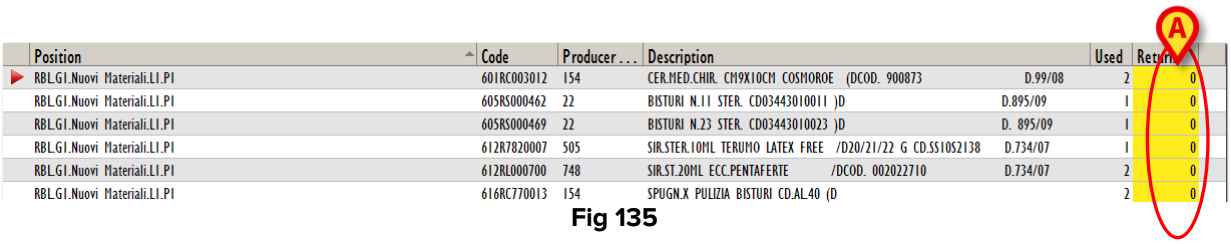
Fig 134 - Filters on the “Returns from operation” screen

The filters available on this screen are:

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

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 135).



Position	Code	Producer . . .	Description	Used	Return
RBLGI.Nuovi Materiali.LI.PI	601RC003012	154	CER.MED.CHIR. CM9X10CM COSMOROE (DCOD. 900873 D.99/08	2	0
RBLGI.Nuovi Materiali.LI.PI	605RS000462	22	BISTURI N.11 STER. CD03443010011)D D.895/09	1	0
RBLGI.Nuovi Materiali.LI.PI	605RS000469	22	BISTURI N.23 STER. CD03443010023)D D. 895/09	1	0
RBLGI.Nuovi Materiali.LI.PI	612R7820007	505	SIR.STER.10ML TERUMO LATEX FREE /D20/21/22 G CD.SS10S2138 D.734/07	1	0
RBLGI.Nuovi Materiali.LI.PI	612RL000700	748	SIR.ST.20ML ECC.PENTAFERTE /DCOD. 002022710 D.734/07	2	0
RBLGI.Nuovi Materiali.LI.PI	616RC770013	154	SPUGN.X PULIZIA BISTURI CD.AL40 (D	2	0

Fig 135

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

- resource position (read only);
- resource code (read only);
- manufacturer code (read only);
- description (read only);
- used quantity (read only);
- quantity to be returned.

The arrow on the left indicates the selected resource. The only editable value on this screen is the quantity of items that must be returned. The corresponding cell is highlighted yellow when no value is displayed (Fig 135 **A**). When a value is specified, before clicking the **Update** button on the command bar, the cell is highlighted light blue (Fig 136).

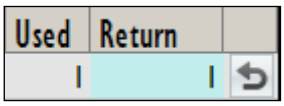


Fig 136

The icon is an “Undo” button. Click it to bring back the row to its original state.

See section 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 is displayed in Fig 137.

Fig 137

Use either the numeric buttons on the upper row (Fig 138) or the workstation keyboard to insert the resource quantities.

Fig 138 - Numeric buttons

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 to scroll up and down the screen contents.
The other buttons are not active on this screen.
Use the **Close** button to close the current screen.

When editing data, the **Update** and **Cancel** buttons are displayed on the command bar.

Click **Update** to save.
Click **Cancel** to discard the changes made.

12.4. How to record the returned resources

To record a returned resource, on the “Returns from operation” screen (Fig 133).

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

The row is selected, the icon is displayed on the left.

- Specify the resource quantity.
- Click **Update**.

After clicking the **Update** button, the quantities specified in the “Used” cell are updated to the new values.
If the quantity of items returned equals the quantity of picked items, the row corresponding to the resource disappears from the list.

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. The returned quantity is increased by one unit. To perform this procedure

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

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

12.5. Returned resources from unknown operation

When returning a resource picked for an unknown operation:

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

icon on the lateral bar.

The “Operation list” screen opens (Fig 139):

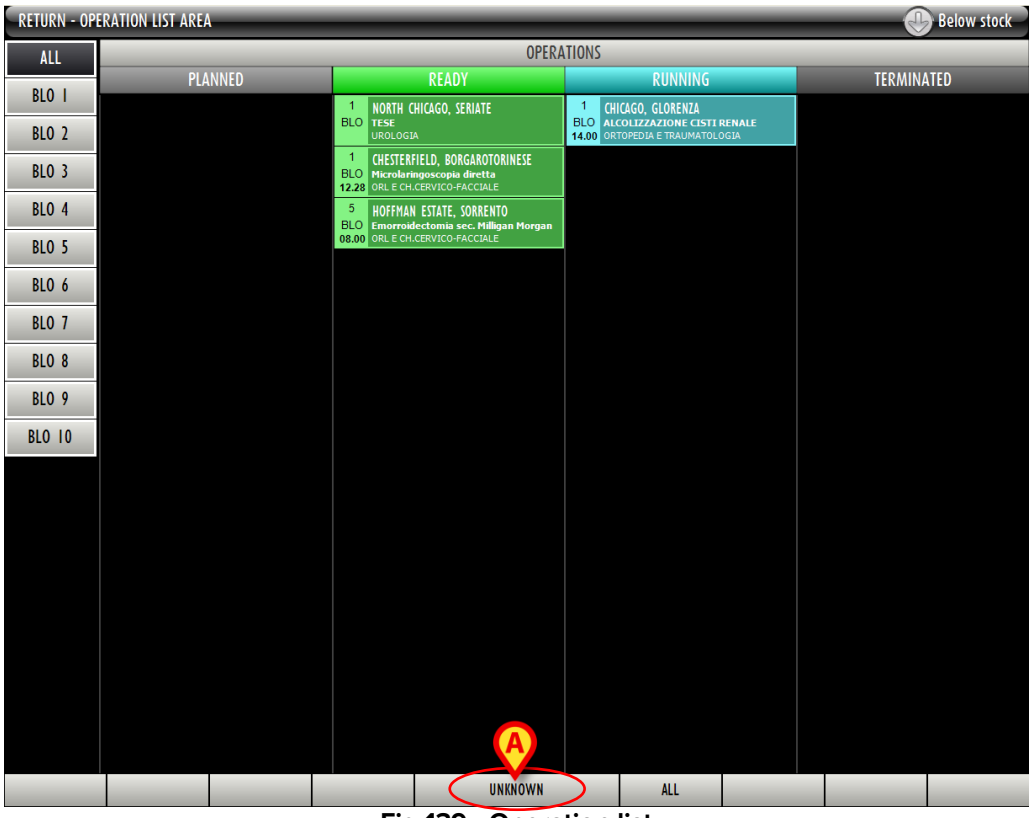


Fig 139 - Operation list

- Click the **Unknown** button on the command bar (Fig 139 **A**).

The “Returns from operation” screen opens (Fig 140). The indication “unknown operation” is displayed on top instead of the indication of the selected operation (Fig 140 **A**).
The list of resources picked for unknown operation is displayed.

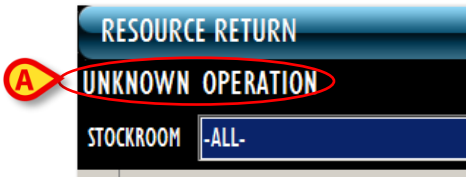


Fig 140

Use the procedures described in sections 12.4 and 12.4.1.

12.6. Display all the picked resources

The **All** button on the command bar (Fig 141 **A**) displays the list of all the resources picked in a selected period. All the pickings are displayed: those associated to the operations, those associated to the cost centers, those associated to any other configured relevant entity.

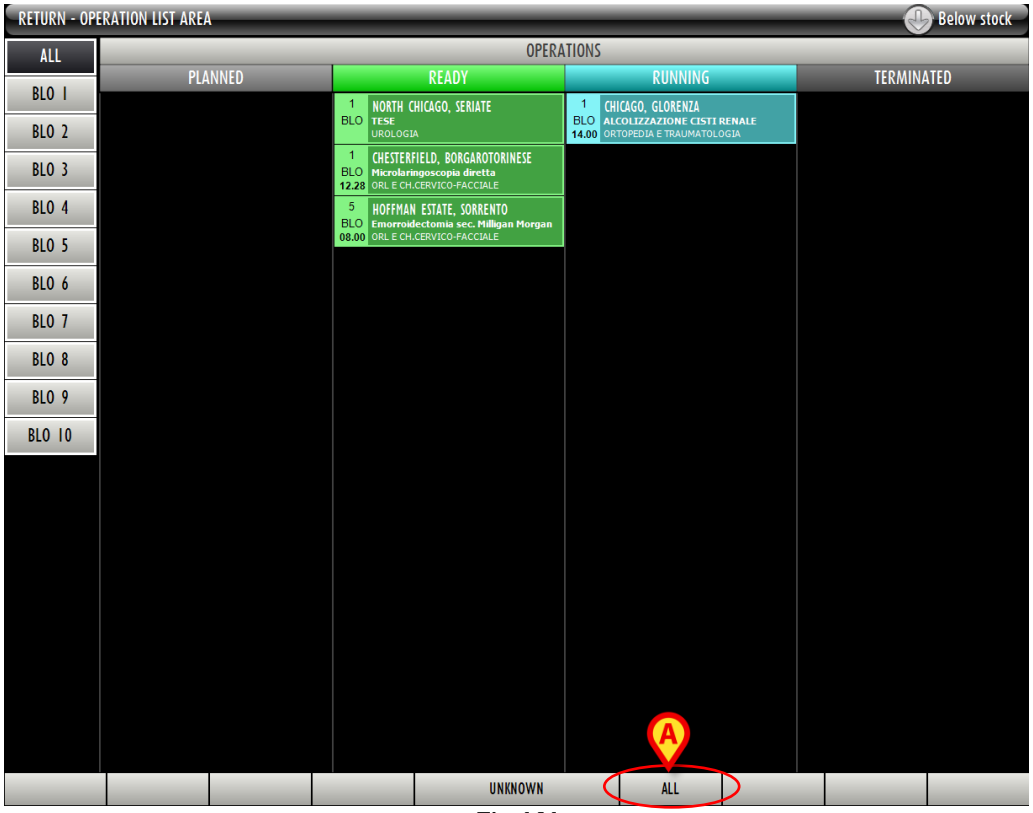


Fig 141

To display the list of all pickings

- Click the **All** button on the command bar (Fig 141 **A**).

The following screen opens (Fig 142)

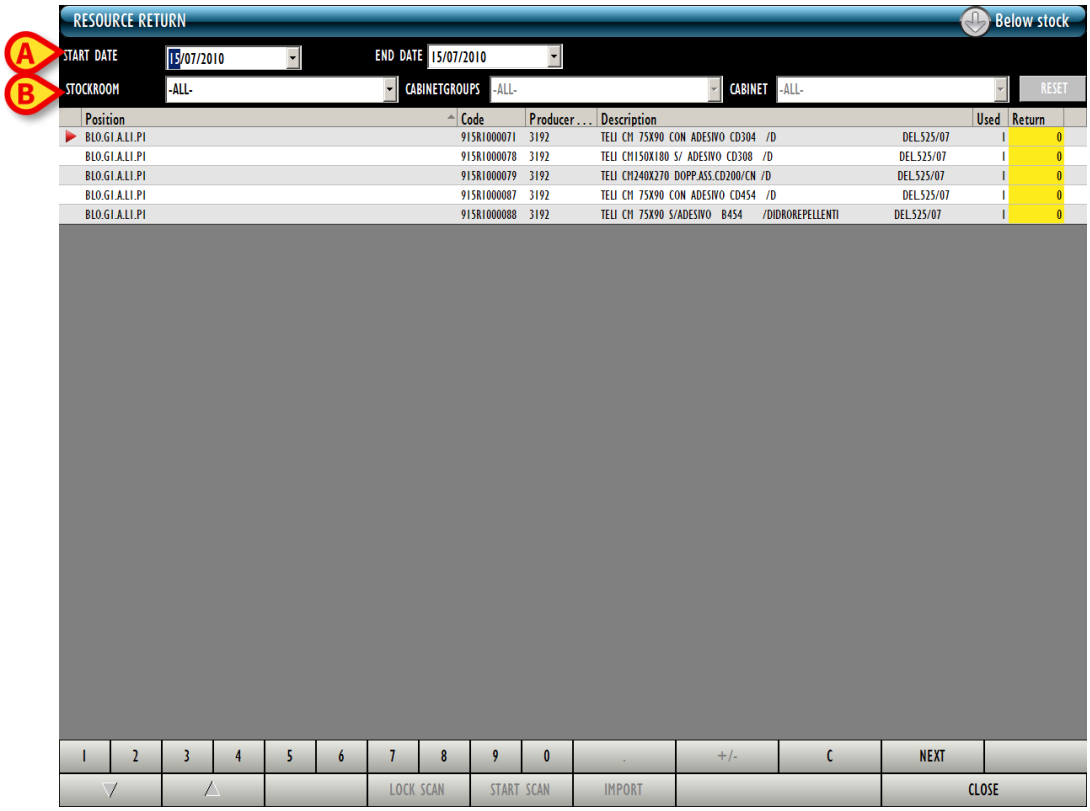


Fig 142 - All the picked resources

Use the “Start date” and “End date” filters (Fig 142 **A**) to select the relevant period of time. Only the resources picked in the period indicated are displayed. Use the other filters (Fig 142 **B**) to display the pickings relating to a specific stockroom, cabinet group or cabinet.

Then, use the procedures described in sections 12.4 and 12.4.1.

13. Waste management

The “Waste” module allows to record the waste of picked resources that were not used and that cannot be returned (for example: broken or contaminated resources). The wasted resources are associated to a specific operation.
To select the module

- Click the corresponding icon

.

The following screen opens (Fig 143 - List of operation).

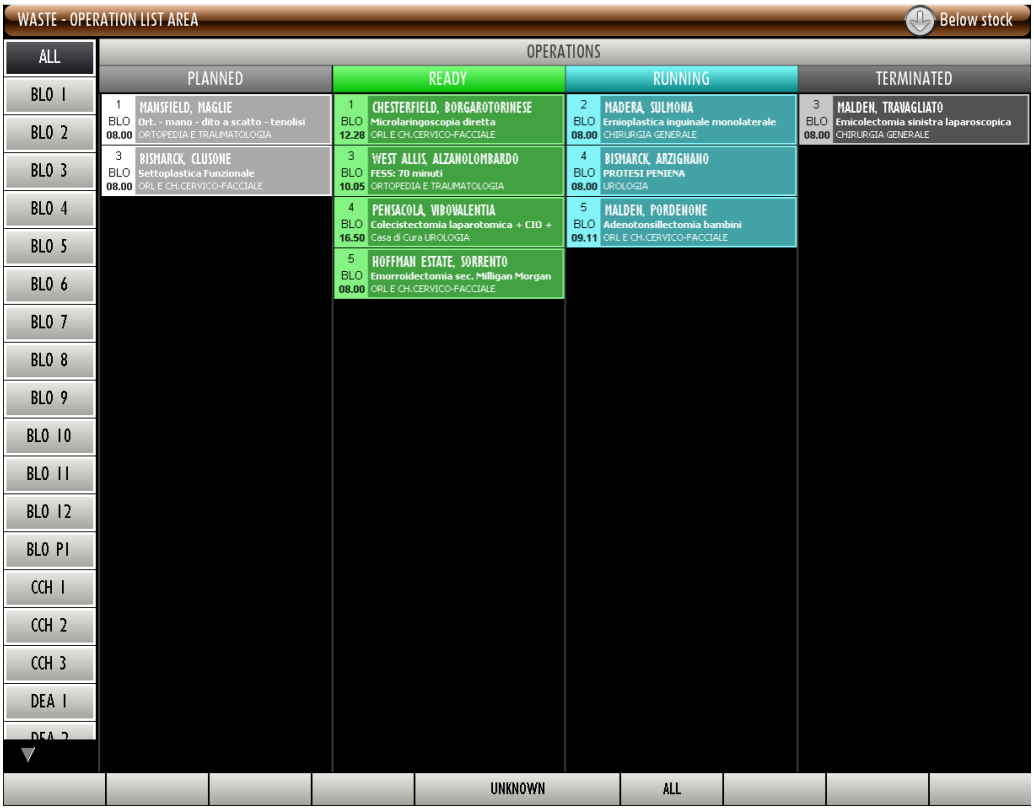


Fig 143 - List of operations

13.1. List of operations - Screen description

See section 12.1 for the description of the “List of operations” screen.

13.2. Operation selection

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

- Click the box corresponding to the operation (Fig 144).

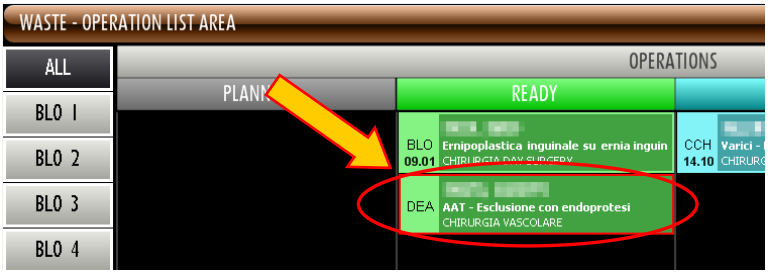


Fig 144 - Operation-rectangle

The “Resource waste” screen opens (Fig 145).

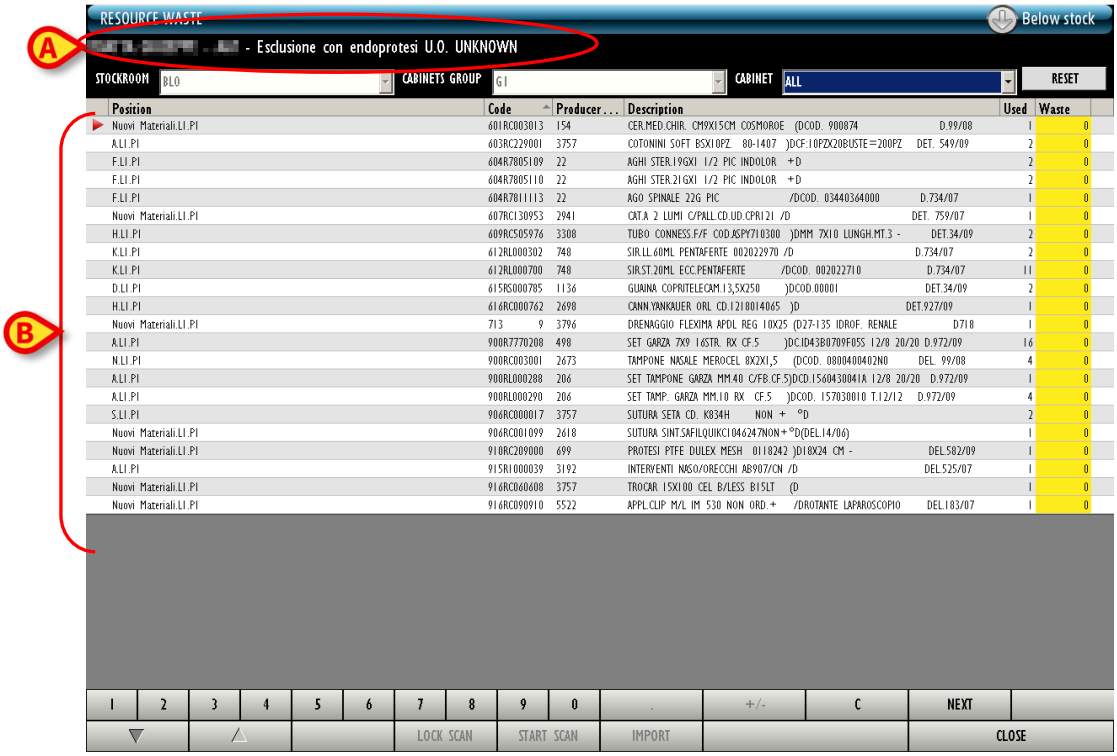


Fig 145 - Resource waste management

The main data of the operation to which the wasted materials are to be associated are displayed on top (Fig 145 **A**).

The data area displays the list of all the resources picked for the selected operation (Fig 145 **B**).

13.3. Wasted materials: screen structure

The “Wasted materials” screen is structured as described in section 1.4. See section 1.4 for a description of the screen general features. This section describes the screen specific features.

13.3.1. Filters

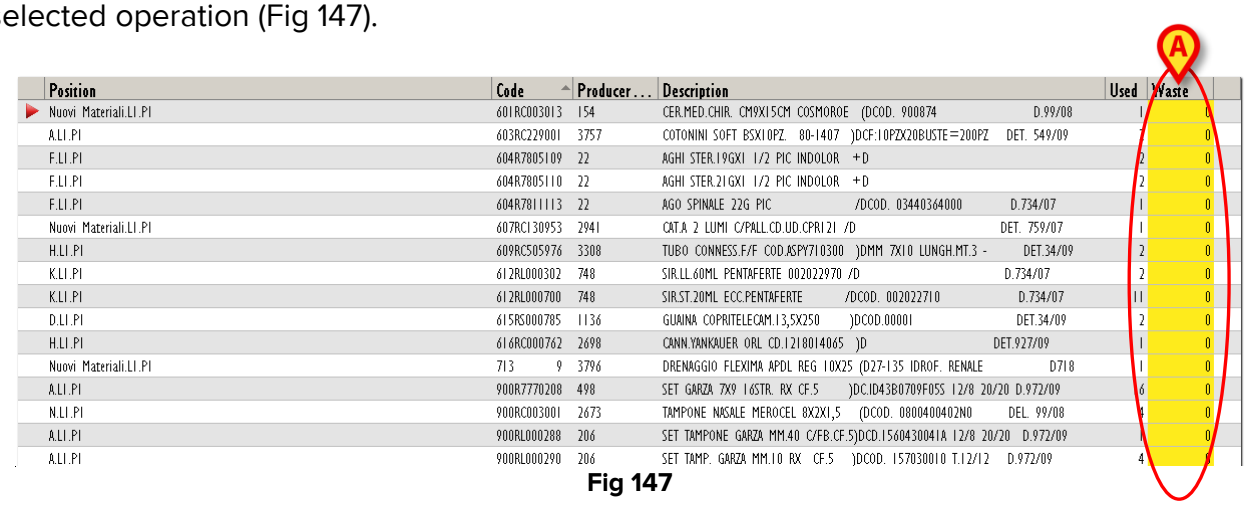
Fig 146 - Filters on the “Wasted materials management ” screen

The filters available on this screen are:

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

13.3.2. Data area

The “Wasted materials ” screen, if no filter is active, displays all the resources picked for the selected operation (Fig 147).



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.19GX1 1/2 PIC INDOLOR +D	2	0
F.LI.PI	604R7805110	22	AGHI STER.21GX1 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.CPR121 /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.ID43B0709F05S 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 147

Each row corresponds to a resource.

For each resource the following information can be displayed:

- the resource position (read only);
- the resource code (read only);
- the producer code (read only);
- the resource description (read only);
- the used resources quantity (not editable);
- the wasted resources quantity.

The ▶ icon on the left indicates the selected row.
The only editable value on this screen is the number of wasted resources; the corresponding cell is highlighted yellow if no value is there specified (Fig 147 **A**). After specification, and before clicking the **Update** button on the command bar, the cell is highlighted light blue (Fig 148).

Fig 148

The icon is an “Undo” button.

See section 13.4 ro the wasted resources recording procedure.

13.3.3. The command bar of the “Waste” screen

The command bar on the “Waste” screen is shown in Fig 149.

Fig 149

Use either the numeric buttons on the upper row of the command bar (Fig 150) or the workstation keyboard to specify the quantities.

Fig 150 - Numeric buttons

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 to scroll up and down the screen contents.
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 are displayed on the command bar.

Click **Update** to save.
Click **Cancel** to discard the changes made.

13.4. How to record a “waste”

To record the fact that a resource was wasted, on the “Waste” screen (Fig 145).

- Click the row corresponding to the “waste” resource.

The row is selected, the icon is displayed on the left.

- Specify the resource quantity.

- 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.
If the quantity of wasted items equals the quantity of picked items, the row disappears.

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.
- 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 “Waste management” module by clicking the

icon on the lateral bar.

The “Operation list” screen opens (Fig 151):

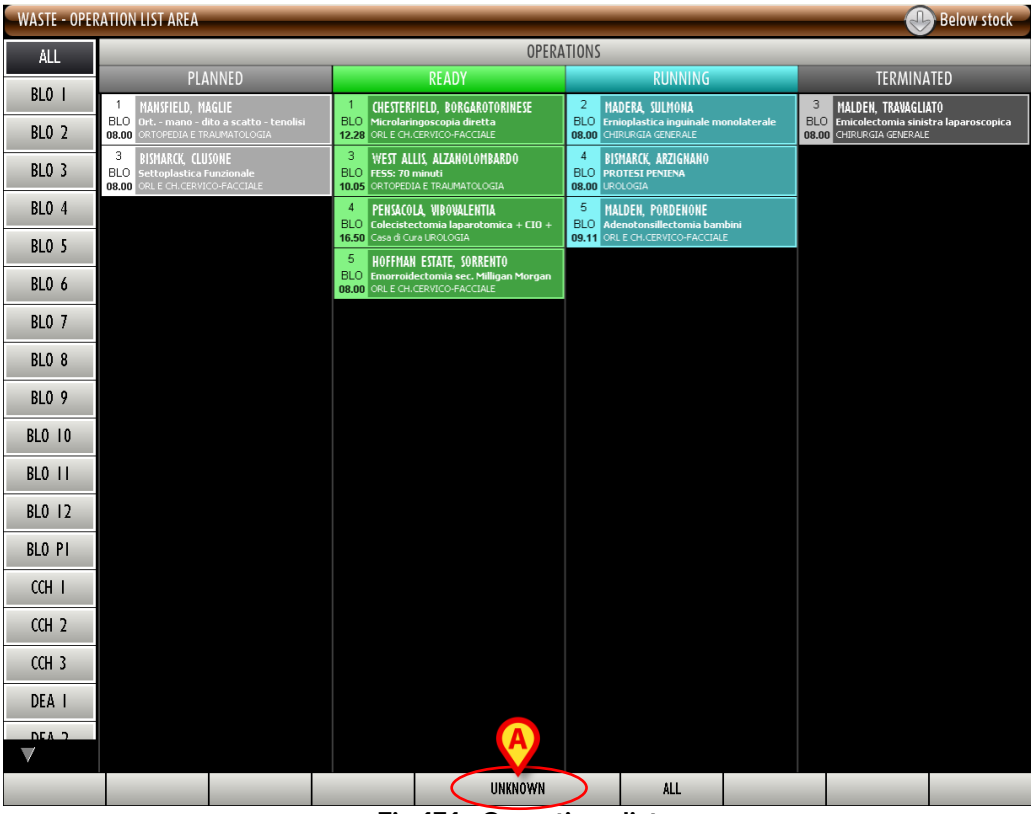


Fig 151 - Operation list

- Click the **Unknown** button on the command bar (Fig 151 **A**).

The "Resource waste" screen opens (Fig 153). The indication "Unknown operation" is displayed on top instead of the indication of the selected operation (Fig 152, Fig 153 **A**).
The screen displays the list of resources picked for unknown operation.

Fig 152

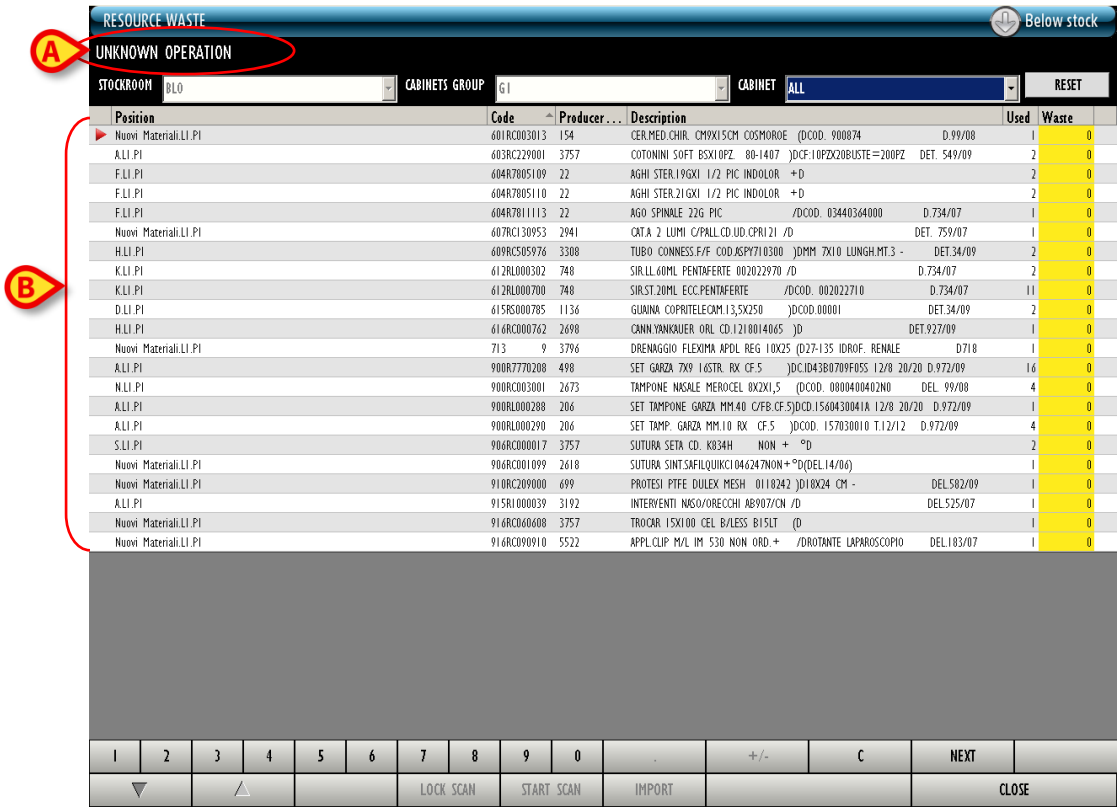


Fig 153 - Resource waste for unknown operation

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

13.6. Display all pickings

The **All** button on the command bar (Fig 154 **A**) displays the list of all the resources picked in a selected period. All the pickings are displayed: those associated to the operations, those associated to the cost centers, those associated to any other configured entity.

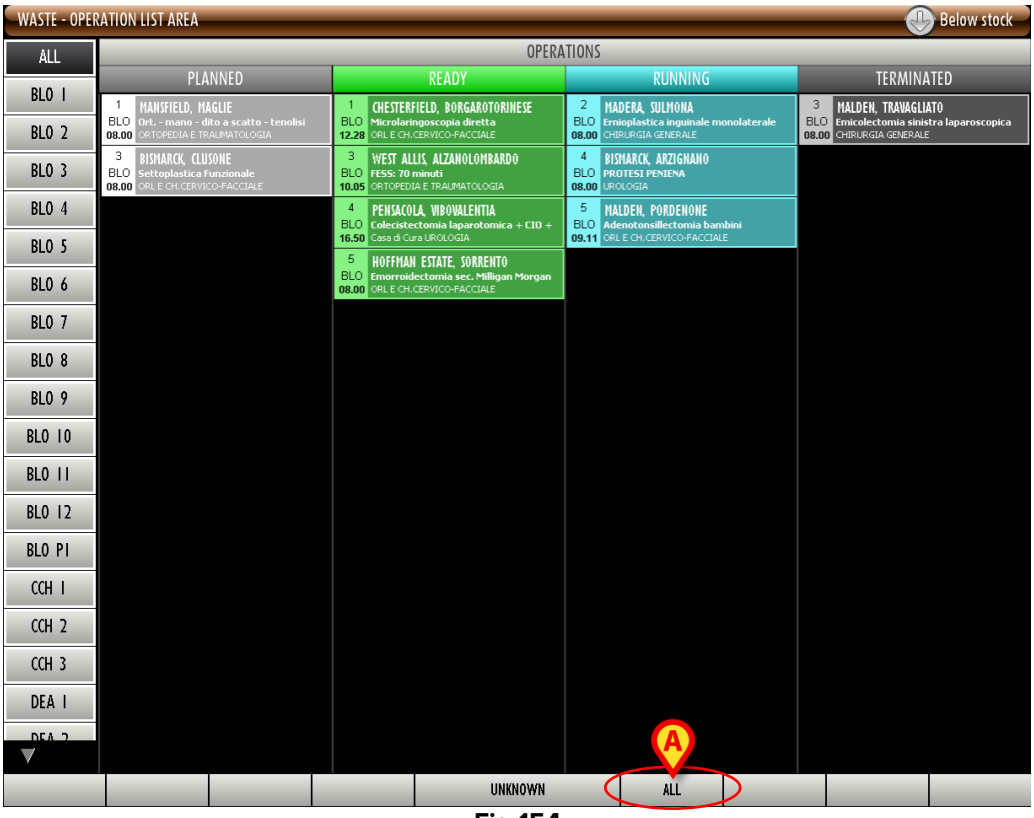


Fig 154

To display the list of all pickings

- Click the **All** button on the command bar (Fig 154 **A**).

The following screen opens (Fig 155)

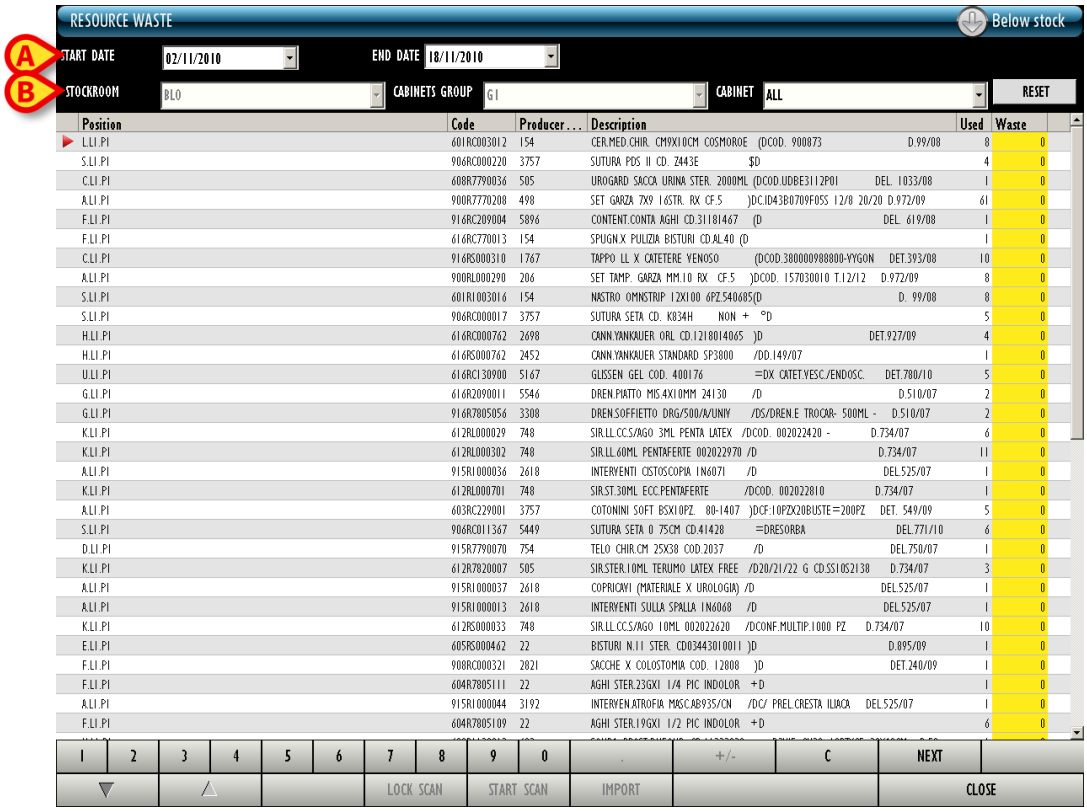


Fig 155 - Display all pickings

Use the “Start date” and “End date” filters (Fig 155 **A**) to select the relevant period of time. Only the resources picked in the period indicated are displayed. Use the other filters (Fig 155 **B**) to display the pickings relating to a specific stockroom, cabinet group or cabinet.

Then, use the procedures described in sections 13.4 and 13.4.1.

14. Operation kit setup procedure

“Stock Management” enables to manage the procedures relating to the operation kits.
The “Kit setup” module enables to prepare the operating kits for a specific operation. To access this module

- Click the corresponding icon

on the lateral bar.

The following screen opens (Fig 156).

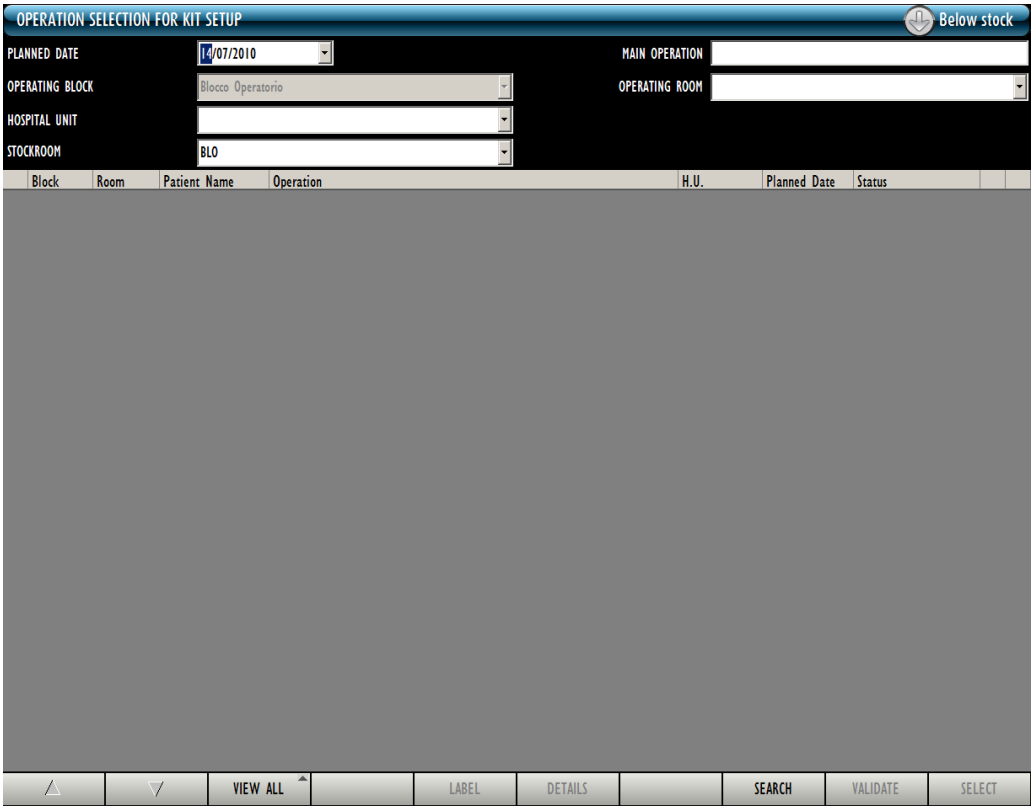


Fig 156

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 as described in section 1.4. See section 1.4 for a description of the screen general features. This section describes the screen specific features.

14.1.1. Filters

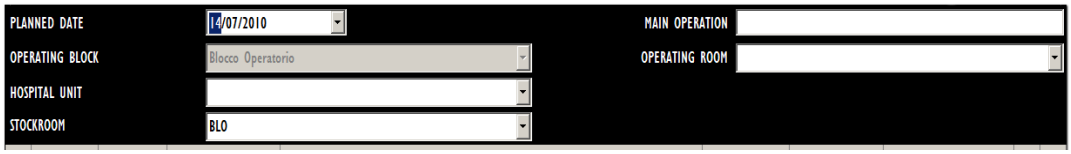


Fig 157 - Filters on the “Kit setup” screen

The filters available on the “Kit setup” screen (Fig 157) are:

- “Planned date” – Indicate the planned date of the operation for which the kit is prepared. The operations listed on this screen (see section 14.1.2) are all planned for the date here specified.
- “Operating block” - Display the operations of a specific block.
- “Hospital unit” - Display the operations of a specific hospital unit.
- “Stockroom” - Select the stockroom from which the resources are going to be picked. This field is not a filter: its specification is necessary to indicate the relevant stockroom.
- “Main operation” - Display only a specific main operation.
- “Operating room” - Display the operations of a specific room.

14.1.2. Data area

The data area lists the operations matching the features specified in the filters. To display the list of operations:

- ➢ Specify the filters values (Fig 158 **A**).
- ➢ Click the **Search** button on the command bar (Fig 158 **B**).

The list of operations is displayed in the data area (Fig 158 **C**).

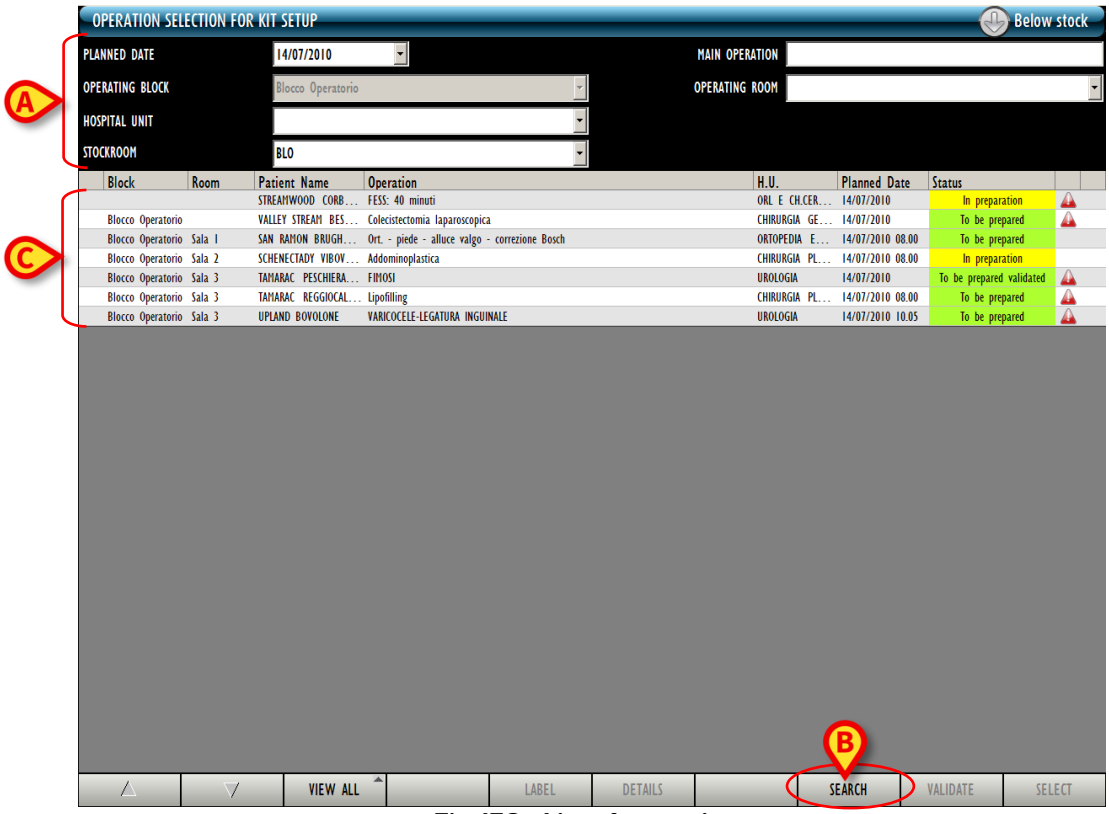


Fig 158 - List of operations

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 was not prepared;
- to be prepared validated - meaning that the kit was not prepared, but the kit preparation list was reviewed and validated (by, for example, the pharmacy staff);
- in preparation - someone is taking care of the kit (either for validation or for preparation);
- prepared - the kit was prepared;
- prepared no more valid - the kit was prepared but something changed after preparation (i.e. the operation data, the kit structure, the resouces quantities in the kit etc.); new validation is required.
- partial return - some of the kit resources were returned;
- total return - all the kit resources were returned.

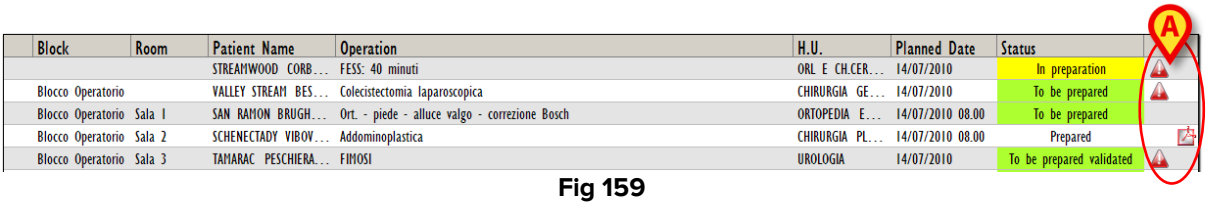
The icon on the left indicates the selected operation.

The icon, when displayed on the right, indicates that the operation is not “locked”. The operation can be locked only on the Digistat® Smart Scheduler solution. See the Smart Scheduler user manual (*USR ENG Smart Scheduler*) for instructions on the lock/unlock procedures (see Fig 159 **A**).

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

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

The icon is displayed on the right on the rows corresponding to “prepared” kits. The icon can be clicked to display a pdf file containing the detailed list of resources belonging to the kit (see Fig 159 **A**).



Block	Room	Patient Name	Operation	H.U.	Planned Date	Status
		STREAMWOOD CORB...	FESS: 40 minuti	ORL E CH.CER...	14/07/2010	In preparation
Blocco Operatorio		VALLEY STREAM BES...	Colecistectomia laparoscopica	CHIRURGIA GE...	14/07/2010	To be prepared
Blocco Operatorio	Sala 1	SAN RAMON BRUGH...	Ort. - piede - alluce valgo - correzione Bosch	ORTOPEDIA E...	14/07/2010 08.00	To be prepared
Blocco Operatorio	Sala 2	SCHENECTADY VIBOV...	Addominoplastica	CHIRURGIA PL...	14/07/2010 08.00	Prepared
Blocco Operatorio	Sala 3	TAMARAC PESCHIERA...	FIMOSI	UROLOGIA	14/07/2010	To be prepared validated

Fig 159

14.1.3. Command bar

This section explains the functionalities of the buttons on the command bar (Fig 160).

Fig 160 - Command bar

Use the arrow buttons to scroll up and down the screen contents.
The **View All** button changes the way the operations are displayed. Click it to open a menu containing the available options (Fig 161).

Fig 161

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 user manuals for an explanation of the meaning of “Reserve”.

Use the **Label** button to print again the sticker label of the selected kit. This button is only active for prepared kits. See section 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 the list of operations matching the features specified in the search filters (see section 14.1.2).

Use the **Validate** button to access the kit validation functionalities. See section 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 is displayed on the left.

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

The following screen opens

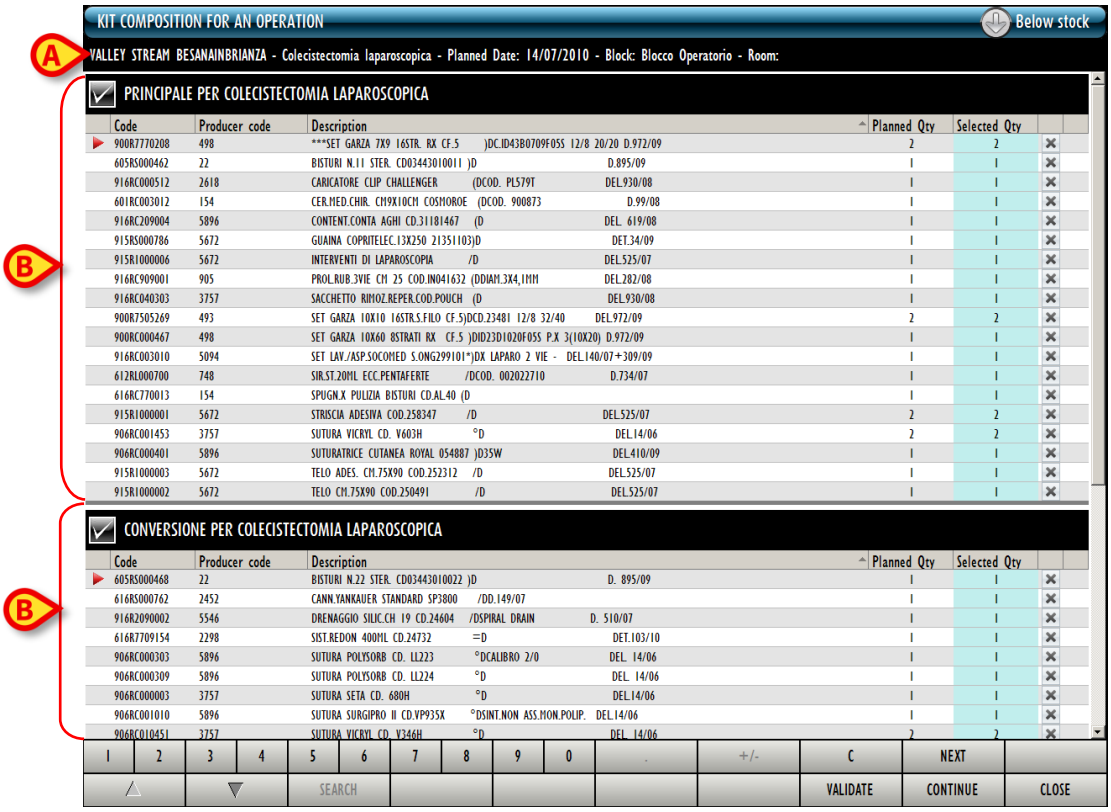
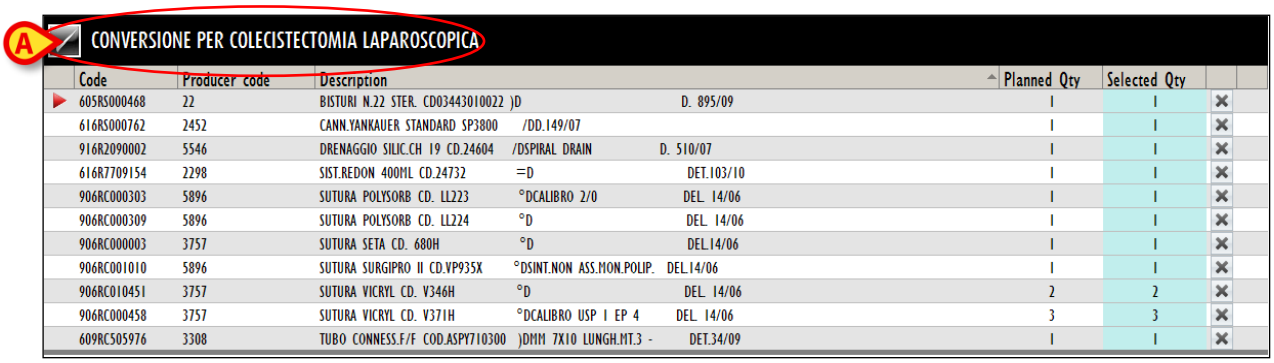


Fig 162 - Kit validation screen

The screen displays on top the main operation data (patient name, operation, planned date and location - Fig 162 **A**).

All the resources that are part of the kit are listed on screen, divided in groups corresponding to sub-kits (Fig 162 **A**).

The name of every group is indicated on the top-left corner of each group (Fig 163).



Code	Producer code	Description	Planned Qty	Selected Qty
605RS000468	22	BISTURI N.22 STER. CD03443010022)D D. 895/09	1	1
616RS000762	2452	CANN.YANKAUER STANDARD SP3800 /DD.149/07	1	1
916R2090002	5546	DRENAGGIO SILIC.CH 19 CD.24604 /DSPIRAL DRAIN D. 510/07	1	1
616R7709154	2298	SIST.REDON 400ML CD.24732 =D DET.103/10	1	1
906RC000303	5896	SUTURA POLYSORB CD. LL223 °DCALIBRO 2/0 DEL 14/06	1	1
906RC000309	5896	SUTURA POLYSORB CD. LL224 °D DEL 14/06	1	1
906RC000003	3757	SUTURA SETA CD. 680H °D DEL.14/06	1	1
906RC001010	5896	SUTURA SURGIPRO II CD.VP935X °DSINT.NON ASS.MON.POLIP. DEL.14/06	1	1
906RC010451	3757	SUTURA VICRYL CD. V346H °D DEL 14/06	2	2
906RC000458	3757	SUTURA VICRYL CD. V371H °DCALIBRO USP 1 EP 4 DEL 14/06	3	3
609RC505976	3308	TUBO CONNESS.F/F COD.ASPY710300)DMM 7X10 LUNGH.MT.3 - DET.34/09	1	1

Fig 163 - Resources group

Click the checkbox placed before the name of the group 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 164).

Fig 164

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 section 14.2.1. After editing, there are two possibilities:

1. 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 165 - the kit status is now “To be prepared validated”);

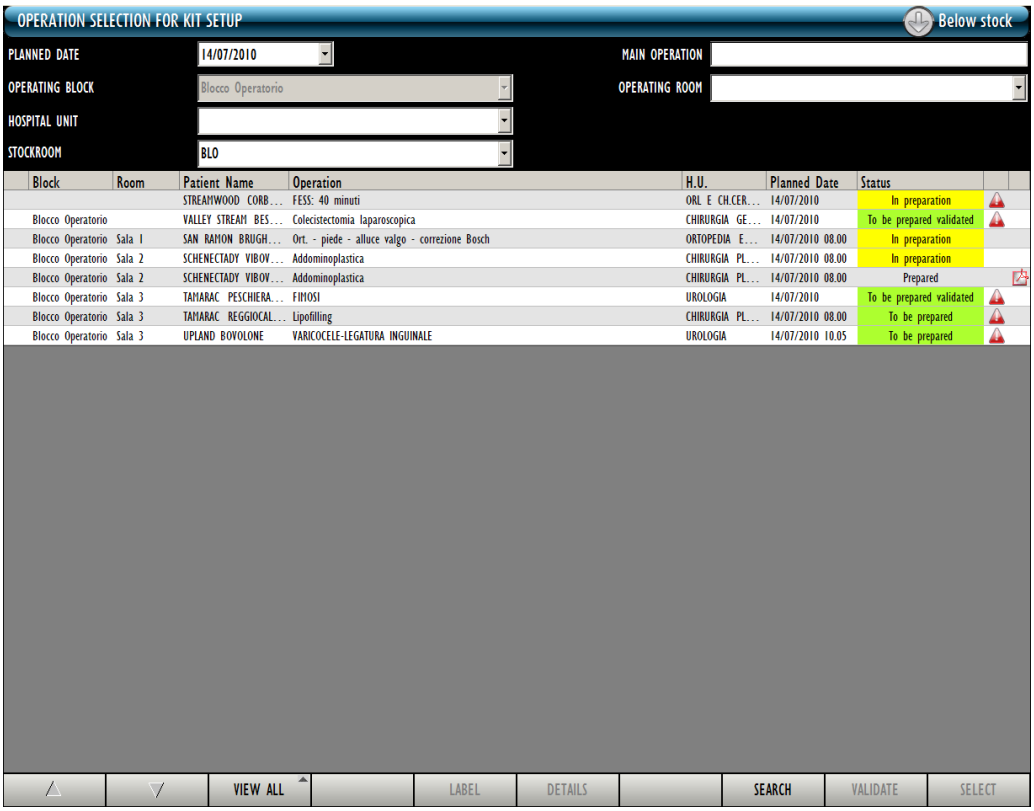


Fig 165 - Operation selection for kit setup

2. Or click the **Continue** button on the command bar to proceed with the kit preparation.

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

14.2.1. Kit editing

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

1) change the indicated quantity;
2) delete a resource if not needed;
3) add a resource to the kit.

14.2.1.1. Change the resource quantity

To change the indicated quantity

- Click the row corresponding to the relevant resource.

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

- Specify the new quantity.

After resource editing the icon is displayed on the right (Fig 166). That is an “Undo” button. Click it to bring back the resource to the original quantity.

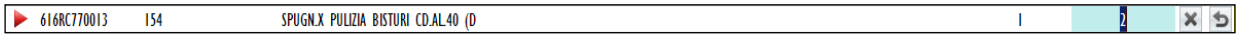


Fig 166 - Quantity has been changed

14.2.1.2. Deleting a resource

Use the button displayed on each row to delete the corresponding resource. After deletion the row appears as in Fig 167.

Fig 167 - Deleted resource

14.2.1.3. Adding a resource

To add a resource to the kit.

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

A search screen opens (Fig 168).

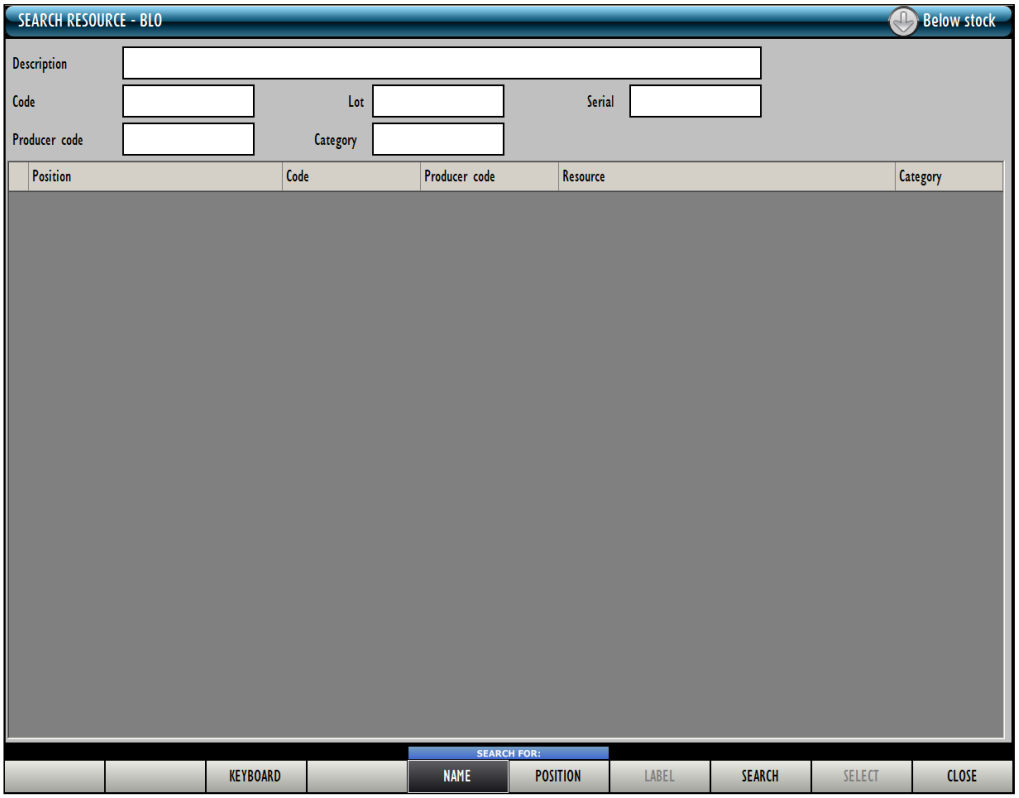


Fig 168 - Search screen

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

The resource(s) is added to the list (Fig 169). The planned quantity is 0. The new required quantity (editable) is 1.

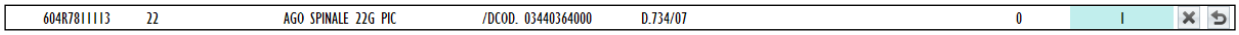


Fig 169 - Resource added

14.3. Kit preparation: the “Kit creation” sheet

After operation selection

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

The kit preparation sheet is displayed in a print preview. See the example shown in Fig 170. This document lists all the resources that are part of the kit to be used for the selected operation.

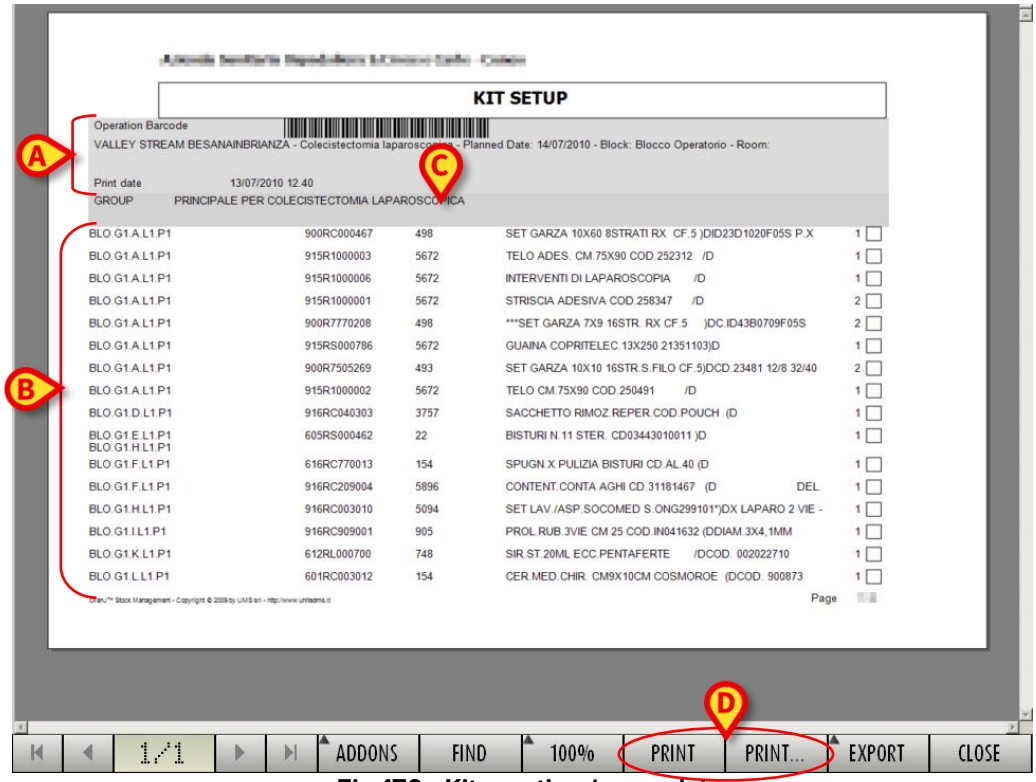


Fig 170 - Kit creation (example)

The resources are ordered by group. At the beginning a header (indicated in Fig 170 **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 are divided in groups. The group is indicated by the dark grey stripe shown in Fig 170 **C**.
The area indicated in Fig 170 **B** displays the list of resources. For each resource are indicated the position, the resource code, the manufacturer code, the description and the required quantity (Fig 171).

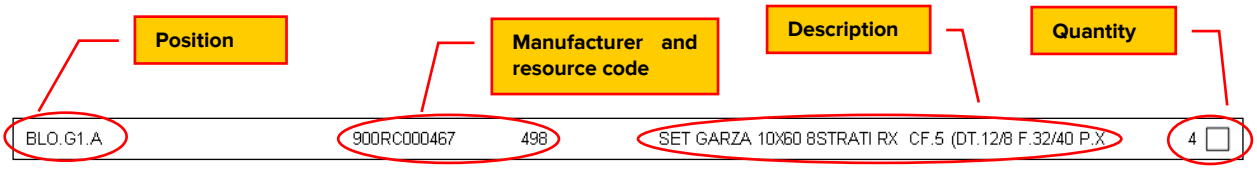


Fig 171 - Resource data

Use the **Print** button (Fig 170 **D**) on the command bar to print the document.
The print sheet is designed 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 172) can be used to record the actual picking of the resources and to verify their quantities.

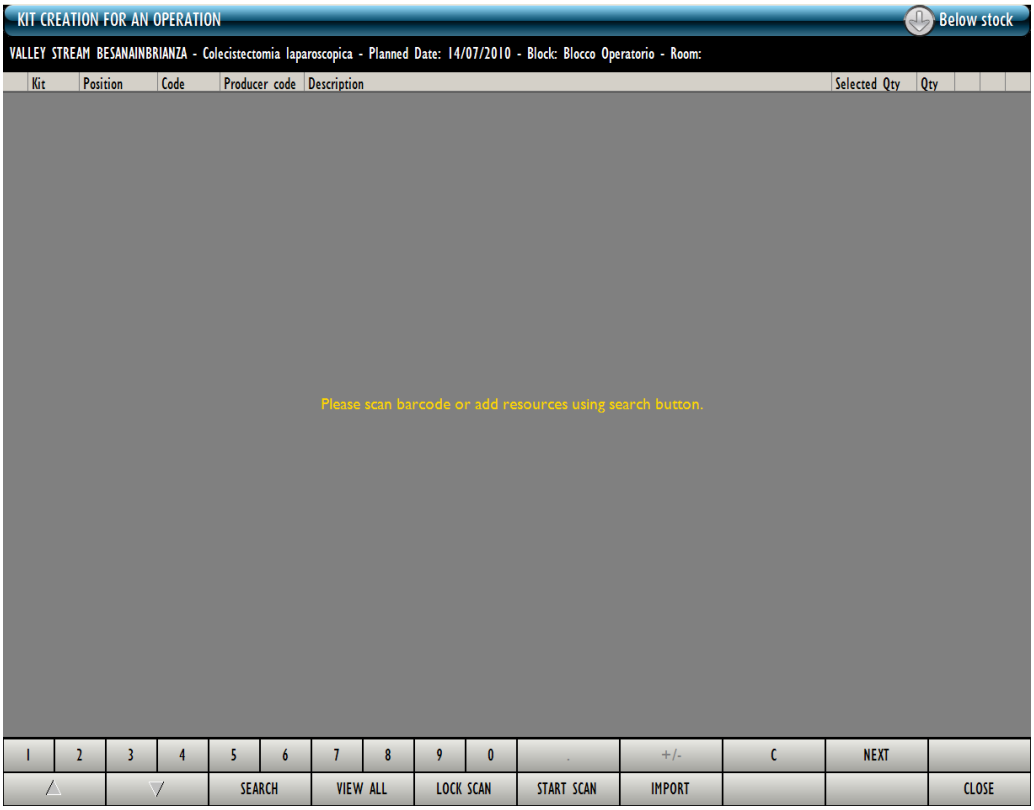


Fig 172 - Kit creation for an operation

The recording can be performed either manually (the procedure is described in section 14.6.1) or using a barcode reader (the procedure is described in section 14.6.2).

Barcode technology is recommended for items selection. Barcode scan statistically diminish selection errors.

14.5. Kit creation screen description

The screen shown in Fig 172 is formed of three main areas:

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

These areas are described in the following sections.

14.5.1. Header

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

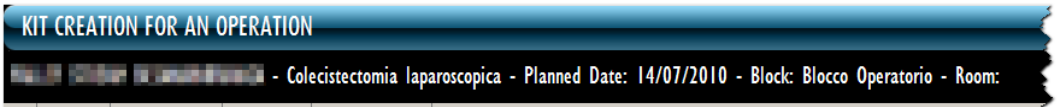


Fig 173 - Header

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 added to the kit (Fig 174 **A**).

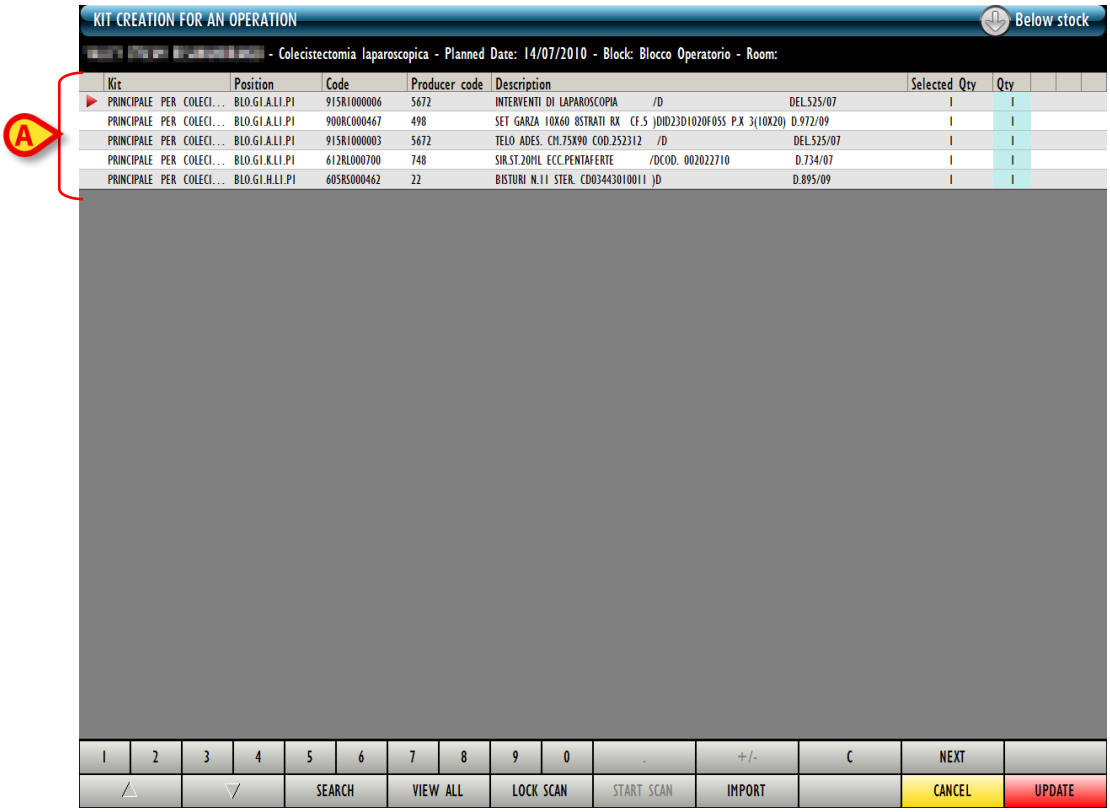


Fig 174 - Recorded resources

The list "grows" as the resources are entered (either manually or by barcode scan). Each row corresponds to a resource (Fig 175).

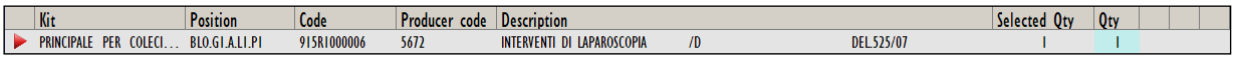


Fig 175 - Resource

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
- Required 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 specified (Fig 176).

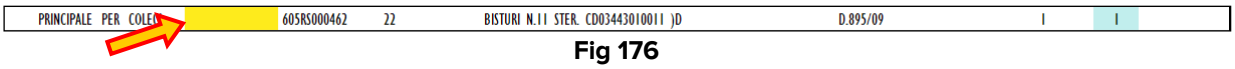


Fig 176

To insert information in a field click the field and type the information. When available, a drop down menu shows the admissible values (Fig 177).

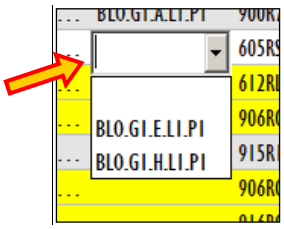


Fig 177 - Information selection

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 is shown in Fig 178.

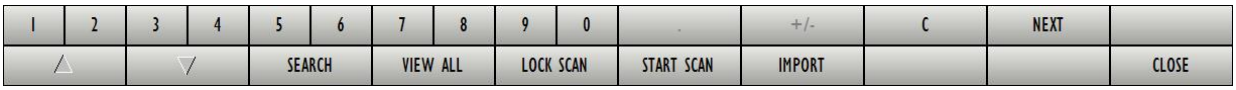


Fig 178 - Command bar

Insert numeric data using either the buttons on the upper row (Fig 179) or the workstation keyboard.

Fig 179 - Numeric buttons

The " **.** " button is a decimal divider. The button is active only if decimal specification is relevant.
The "**+/-**" button changes a value to negative/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 to scroll up and down the screen contents.
Use the **Search** button to access the system's search functionalities (described in section 22). Click this button to open the screen shown in Fig 181.
Use the **View All** button to display the complete list of resources required for the selected kit.
Use the **Lock Scan** button to lock the workstation while reading numerous barcodes that will be downloaded later. See section 14.6.3 for a description of the related procedures.
Use the **Start Scan** button to begin reading barcodes that will be download later. See section 14.6.4 for the instructions relating to this procedure.

Use the **Import** button to import items using a wireless barcode reader having internal memory. See section 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.
Click **Update** to save
Click **Cancel** to discard the changes made.

14.6. Resource picking for kit composition

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

14.6.1. Manual procedure

To manually record the resource picking

- Click the **Search** button on the command bar (Fig 172).

Fig 180

The search screen opens (Fig 181). The screen is described in section 22.

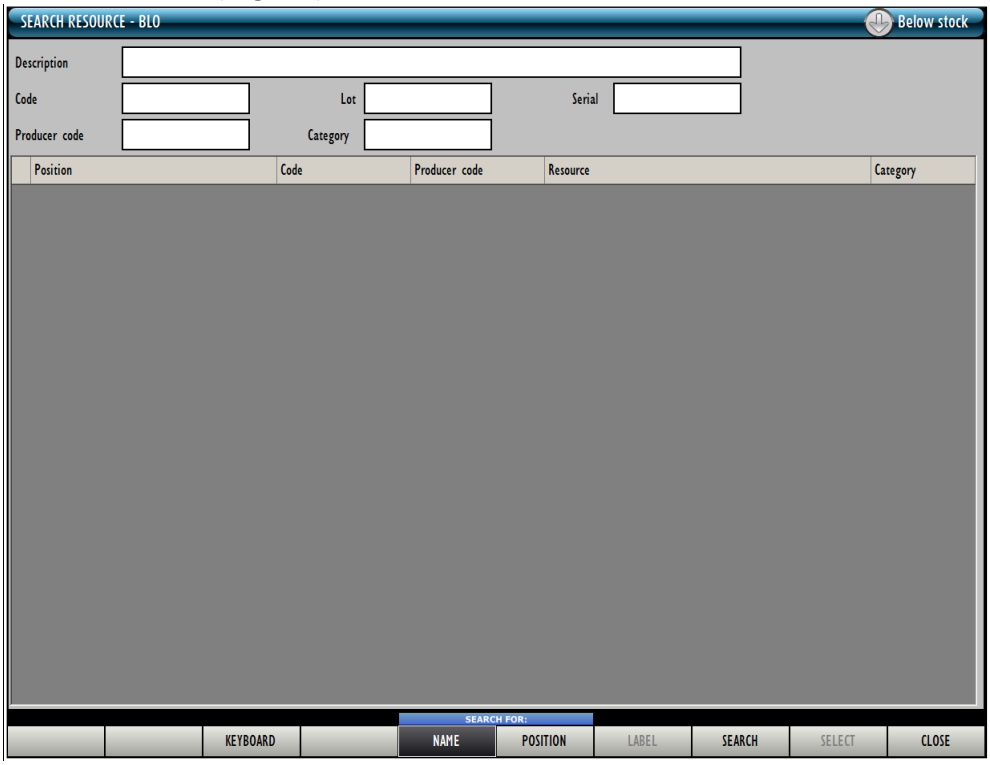


Fig 181 - Search resource

- Search the wanted resource using the functionalities described in section 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 182 **A**).

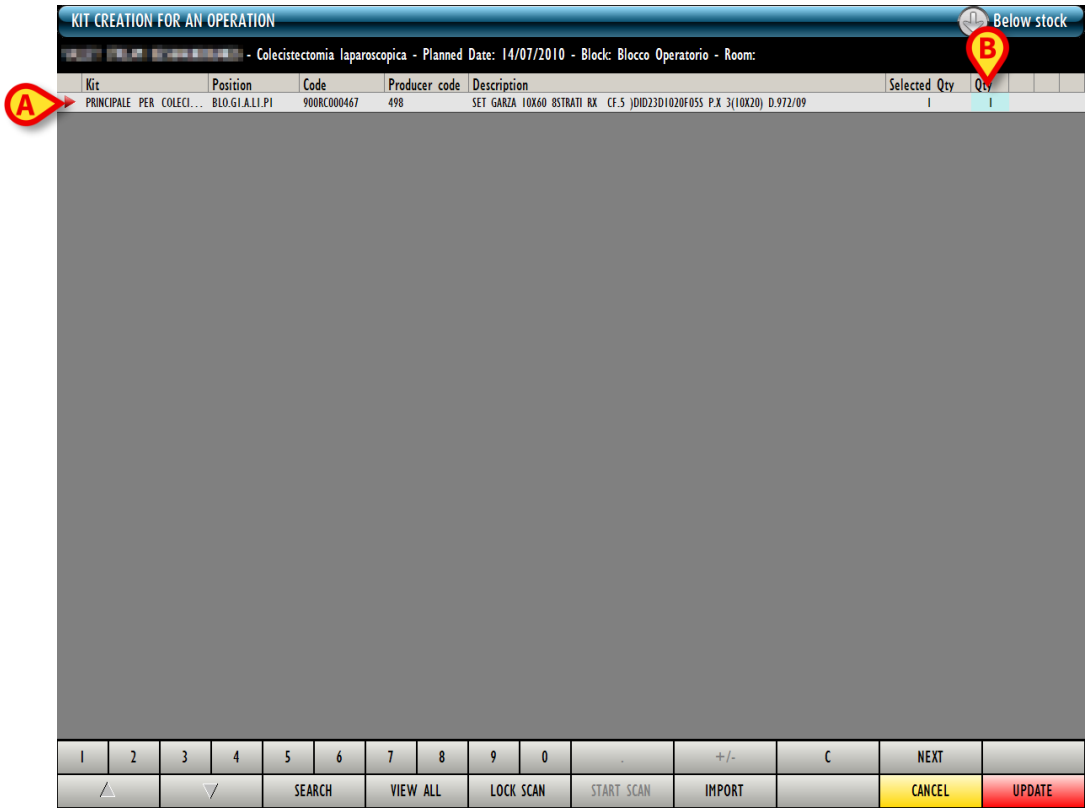


Fig 182

- Specify the resource quantity in the “Quantity” field (Fig 182 **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 be recorded scanning the resource’s barcode. To do that:
Access the “Kit creation” screen (Fig 182),

- Scan the barcode of the resource.

A row corresponding to the resource is displayed.
When barcodes of resources of the same kind are scanned the resource quantity increases.

14.6.3. Lock scan

The **Lock Scan** button (Fig 183) locks the workstation while reading barcodes that will be downloaded later.

Fig 183 - Command bar

Use this functionality when it is necessary to leave the workstation to personally scan barcodes located away from the pc. A wireless barcode reader properly configured is required.

- Click the **Lock Scan** button.

The button appears as selected. The following window is displayed (Fig 184).

Fig 184

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

When reading is done,

- Insert the user password in the field indicated in Fig 184 **A**.
- Click the **Continue** button (Fig 184 **B**).

The workstation is this way unlocked. The rows corresponding to all the barcodes read are displayed.

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

14.6.3.1. How to force the workstation unlocking

The workstation can be unlocked by another user with specific permissions. To force the workstation unlocking:

- Click “Advanced options” on the password window (Fig 185).

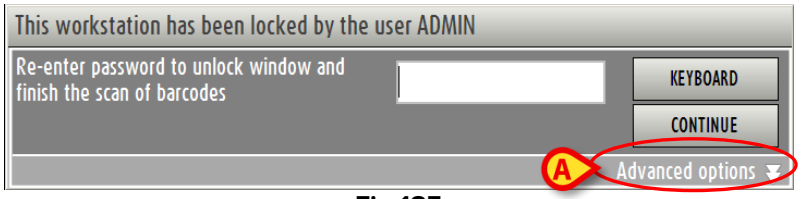


Fig 185

The window changes in the following way (Fig 186).

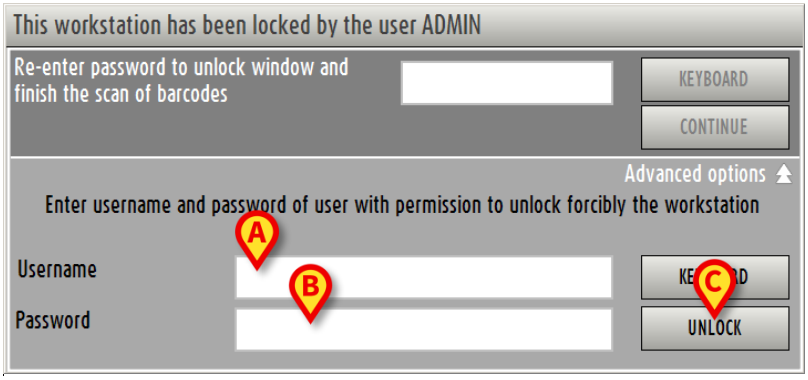


Fig 186 - Advanced options

- Insert the username of the new user in the “Username” field (Fig 186 **A**).
- Insert the password of the new user in the “Password” field (Fig 186 **B**).
- Click the **Unlock** button (Fig 186 **C**).

The workstation is unlocked.

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

14.6.4. Start scan

Use the **Start Scan** button (Fig 187) to start reading barcodes that will be downloaded later.

Fig 187 - Command bar

This is the procedure:

- Click the **Start Scan** button.

The button changes to **Stop Scan**. The user is logged out.

- Read the barcodes.

When done, to import the data:

- 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 are displayed.
While scanning, the blue bar on top of the screen displays the following advice: “Press STOP SCAN to import the scanned products” (Fig 188).

Fig 188

14.6.5. Import

Use the **Import** button (Fig 189) to import the data acquired with a wireless barcode reader having internal memory.

Fig 189 - Command bar

- Scan the barcodes using the properly configured device.
- Click the **Import** button.

Import status is notified while in progress..

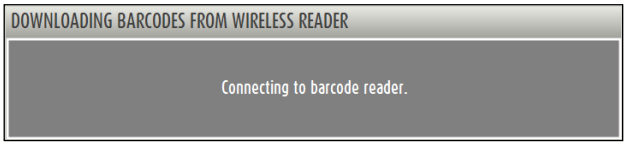


Fig 190

When done, the rows corresponding to the scanned resources are displayed.

14.6.6. The “View all” option

Use the **View All** button to display the complete list of resources required for the selected operation (Fig 191).

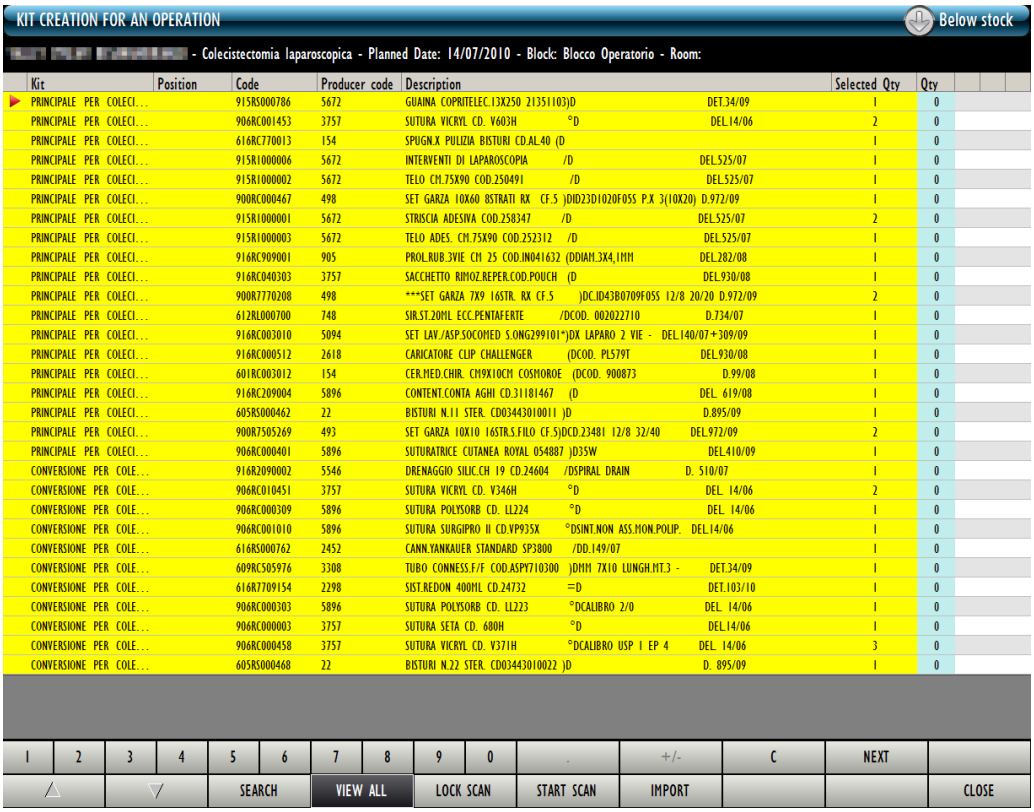


Fig 191 - Display all

When the “View all” mode is activated the button appears as selected.
The resources are highlighted yellow until they are indicated as “picked” and added to the kit in the required quantities. After “picking” the row becomes white.
The procedures relating to the resources picking are described in section 14.6.1.

14.6.7. Quick resource quantity recording

To quickly record the required quantities:

- Click the cell indicating the “Required quantity” of the relevant resource. See Fig 192 **A** for an example.

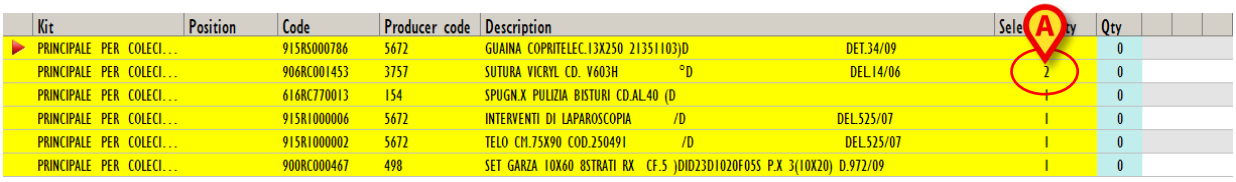


Fig 192

The required quantity is automatically inserted in the “Used quantity” cell (Fig 193 **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...	BLO.GI.S.LI.PI	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 193

14.7. Exceptions

There are cases in which the recorded quantity of a resource does not correspond to the quantity required according to the kit composition. These cases are signalled with a specific procedure. There are three possible cases:

1) a resource is recorded that was not in the kit composition;
2) the resource quantity is higher than that stated;
3) the resource quantity is lower than that stated.

The exceptions, in all cases, are signalled by the pink colour highlighting the corresponding row (Fig 194 **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...	BLO.GI.S.LI.PI	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...	BLO.GI.A.LI.PI	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...	BLO.GI.D.LI.PI	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 194 - Exceptions

The icon on the right (Fig 194 **B**) cancels the resource. After clicking the icon the row appears as in Fig 195.

PRINCIPALE PER COLECI...	BLO.GI.A.LI.PI	900R7505269	493	SET GARZA 10X10 16STR.S.FILO CF.5)DCD.23481 12/8 32/40	DEL.972/09	2	0

Fig 195 - Cancelled resource

The icon on the right of the row (Fig 194 **B**) accepts an exception as a correct value. After clicking the icon the row appears as in Fig 196. The cell indicating the recorded quantity remains yellow to indicate that it still is an exception.

PRINCIPALE PER COLECI...	BLO.GI.A.LI.PI	900R7505269	493	SET GARZA 10X10 16STR.S.FILO CF.5)DCD.23481 12/8 32/40	DEL.972/09	2	1

Fig 196 - Accepted exception

In both cases the button can be clicked to “Undo”.

14.8. Completing the kit creation procedure

When the kit is complete,

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

The procedures requires now to print the sticker-labels that will be stuck to the cases containing the resources.
For this purpose a specific window is displayed (Fig 197) after the **Update** button is clicked.

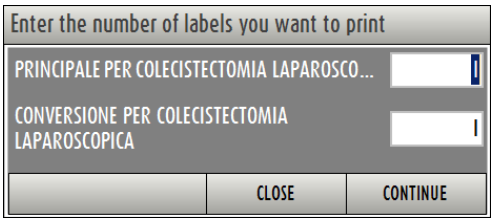


Fig 197 - print label

The window lists the groups that are part of the prepared kit. The field placed alongside each group allows to specify the number of labels to be printed (for example: if the resources belonging to the same group are placed in different cases).

- Specify the number of labels.
- Click **Continue**.

The labels are printed. A print report is created as summary, listing the resources in the different groups. A print preview is displayed (Fig 198).
According to the actual hospital workflows, the labels can be stuck to the cases, or anywhere appropriate; the summary document can be printed to accompany the kit into the operating room.

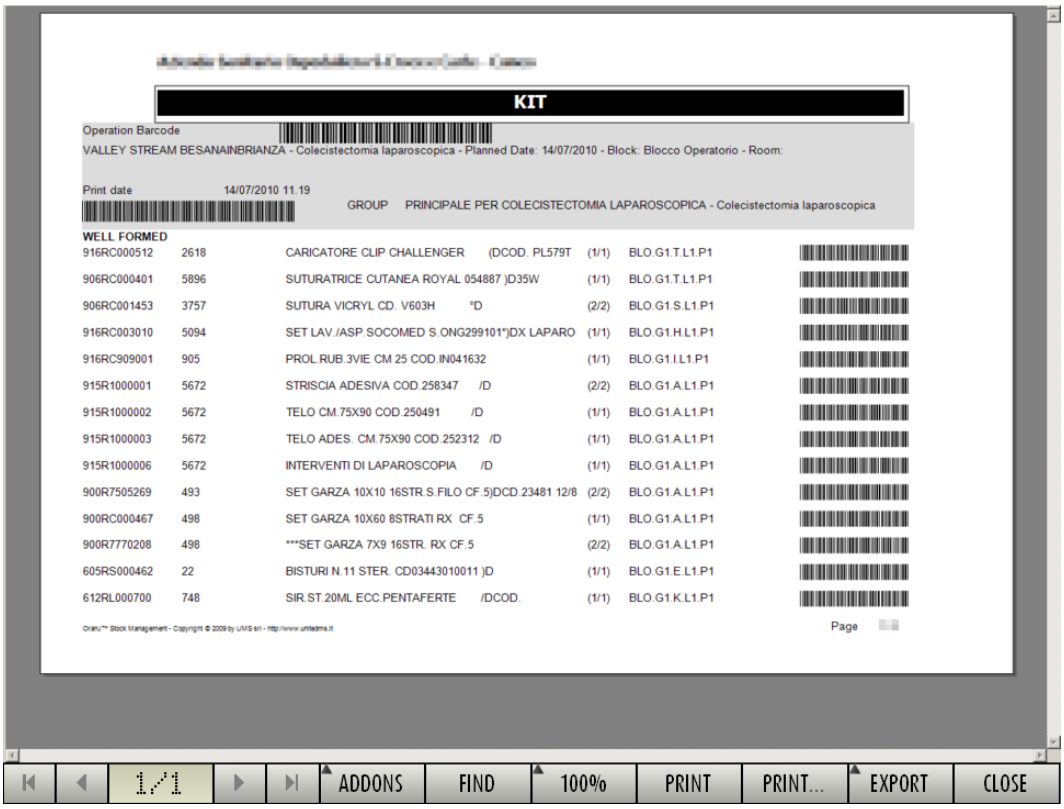


Fig 198 - Kit content (print report)

15. Return from kit

The “Return from kit” module allows to record the resources that were picked for a kit but were not used (“Returns” from now on). To select the module:

- Click the corresponding icon . The following screen opens (Fig 199).

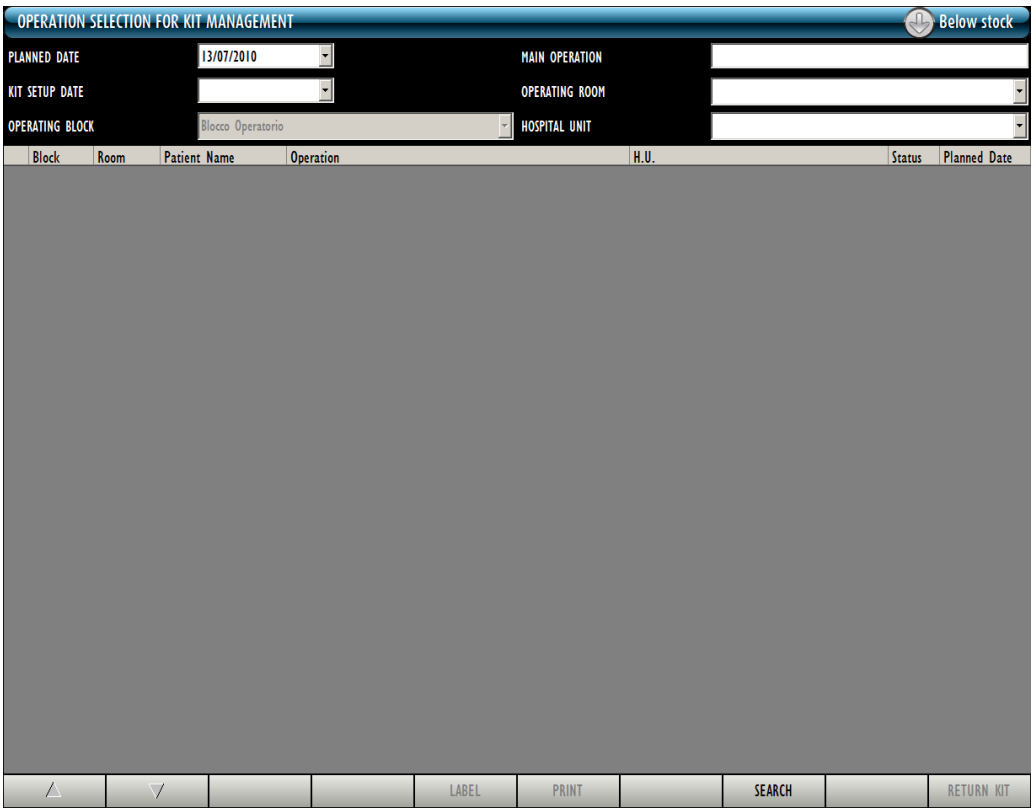


Fig 199 - Operation selection for “return from kit”

This screen allows to find and select the operation for which the resources are returned.

15.1. Screen structure

The “Return from kit” screen is structured as described in section 1.4. See section 1.4 for a description of the screen general features. This section describes the screen specific features.
The procdure requires, first, the selection of the operation to which the returned resources are attributed. After selection, the list of resources picked for that operation is displayed.

15.1.1. Operation selection - Filters

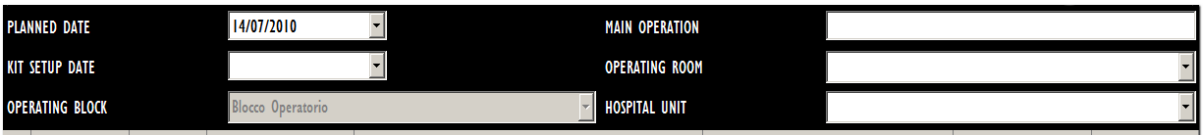


Fig 200 - Filters on the “Operation selection” screen

The available filters on this screen are:

- “Planned date” - Specify the planned date of the operation for which the kit was prepared. The operations listed on this screen are all planned for the date here specified.
- “Kit setup date” - Specify the date in which the kit was set up.
- “Operating block” - Display the operations of a specific operating block.
- “Main operation” - Display the operations matching the specified intervention.
- “Hospital unit” - Displays the operations of a specific hospital unit.
- “Operating room” - Displays the operations of a specific room.

15.1.2. Operation selection - Data area

The data area contains the list of operations matching 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 201

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 kit status
- the operation date and time.

There are 7 possible statuses for a kit. These are:

- to be prepared - meaning that the kit was not prepared;
- to be prepared validated - meaning that the kit was not prepared, but the kit preparation list was reviewed and validated (by, for example, the pharmacy staff);
- in preparation - someone is taking care of the kit (either for validation or for preparation);
- prepared - the kit was prepared;
- prepared no more valid - the kit was prepared but something changed after preparation (i.e. the operation data, the kit structure, the resouces quantities in the kit etc.); new validation is required.
- partial return - some of the kit resources were returned;
- total return - all the kit resources were returned.

The icon on the left indicates the selected operation.

15.1.3. Operation selection - Command bar

The command bar is displayed in Fig 202.

Fig 202 - Command bar

Use the arrow buttonsto scroll up and down the screen contents.
The **Label** button prints the kit sticker label again, in case of need (see section 14.8).
The **Print** button prints the kit resources list again, in case of need (see section 14.8).
Use the **Search** button to display the list of operations matching 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 section 15.2.

15.2. "Operation kits give back" screen description

To access the "Operation kits give back" screen, on the "Operation selection" screen (Fig 199),

- Click the row corresponding to the operation for which the returns are going to be recorded.

The row is selected, the icon is displayed on the left.

- Click the **Return Kit** button on the command bar.

The following screen opens (Fig 203).

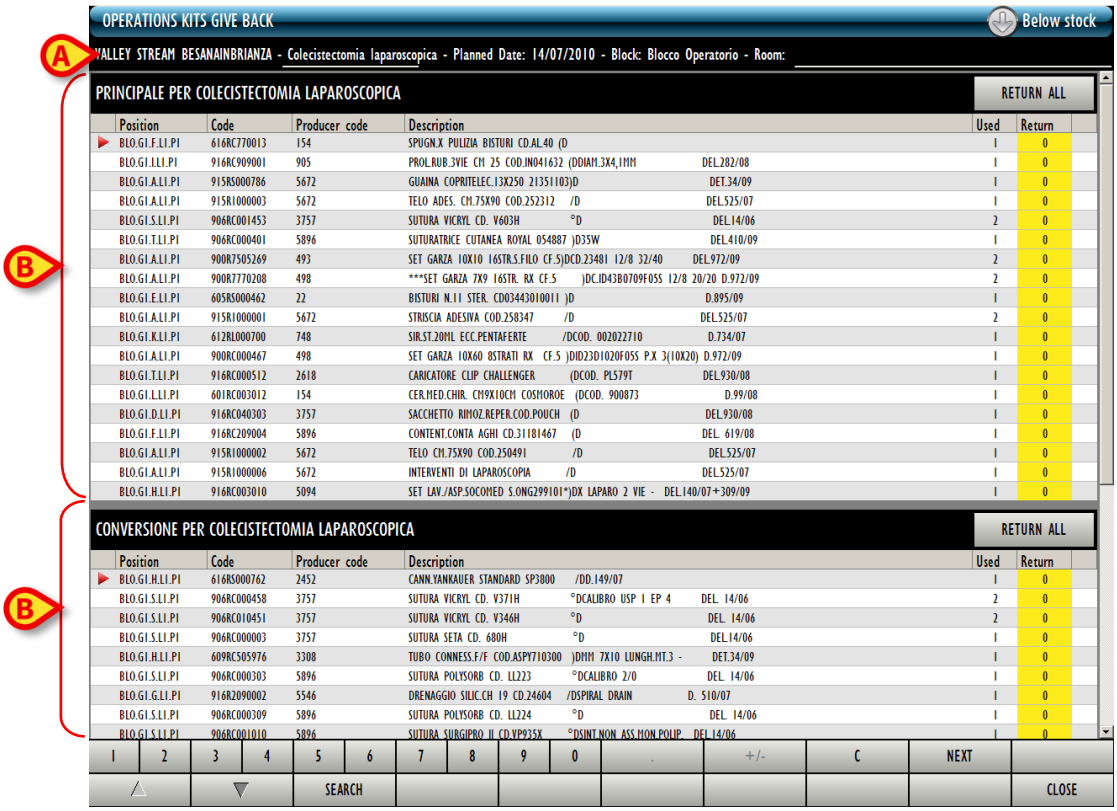


Fig 203 - Returns from kit

The screen displays on top the main operation data (patient name, operation, planned date and location - Fig 203 **A**).

All the resources that are part of the kit are displayed on screen, divided in groups corresponding to sub-kits (Fig 203 **B**).

The name of every group is indicated on the top-left corner of each group (Fig 204 **A**).

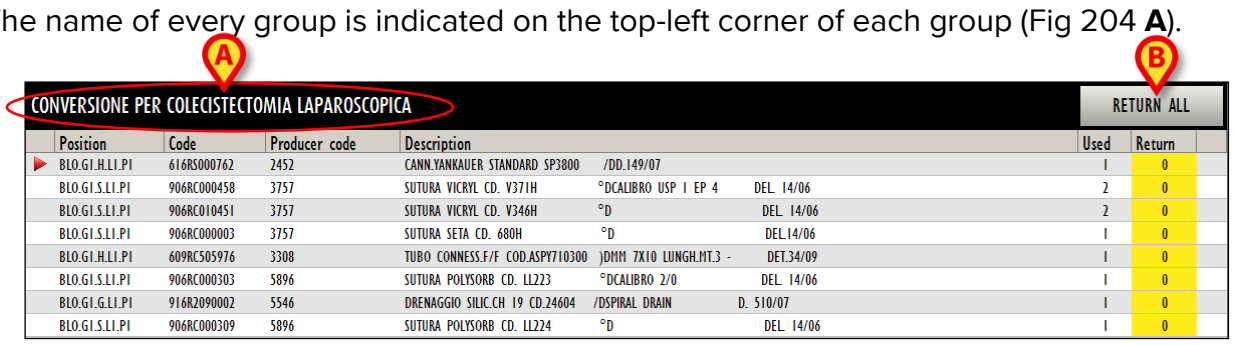


Fig 204 - Resources group

The **Return All** button on the right (Fig 204 **B**) allows, with just one click, to return all the resources of a group at once. After clicking the button the list of resources appears as in Fig 205. The button turns to **Reset Return**. Click **Reset Return** to annul the procedure.

CONVERSIONE PER COLECISTECTOMIA LAPAROSCOPICA

RESET RETURN

Position	Code	Producer code	Description	Used	Return
BLO.GI.H.LI.PI	616RS000762	2452	CANN.YANKAUER STANDARD SP3800 /DD.149/07	1	1
BLO.GI.S.LI.PI	906RC000458	3757	SUTURA VICRYL CD. V371H °DCALIBRO USP 1 EP 4 DEL. 14/06	2	2
BLO.GI.S.LI.PI	906RC010451	3757	SUTURA VICRYL CD. V346H °D DEL. 14/06	2	2
BLO.GI.S.LI.PI	906RC000003	3757	SUTURA SETA CD. 680H °D DEL.14/06	1	1
BLO.GI.H.LI.PI	609RC505976	3308	TUBO CONNESS.F/F COD.ASPY710300)DMM 7X10 LUNGH.MT.3 - DET.34/09	1	1
BLO.GI.S.LI.PI	906RC000303	5896	SUTURA POLYSORB CD. LL223 °DCALIBRO 2/0 DEL. 14/06	1	1
BLO.GI.G.LI.PI	916R2090002	5546	DRENAGGIO SILIC.CH 19 CD.24604 /DSPIRAL DRAIN D. 510/07	1	1
BLO.GI.S.LI.PI	906RC000309	5896	SUTURA POLYSORB CD. LL224 °D DEL. 14/06	1	1
BLO.GI.S.LI.PI	906RC001010	5896	SUTURA SURGIPRO II CD.VP935X °DSINT.NON ASS.MON.POLIP. DEL.14/06	1	1
BLO.GI.E.LI.PI	605RS000468	22	BISTURI N.22 STER. CD03443010022)D D. 895/09	1	1
BLO.GI.G.LI.PI	616R7709154	2298	SIST.REDON 400ML CD.24732 =D DET.103/10	1	1

Fig 205 - 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”

➢ Click the row corresponding to the resource that must be returned.

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

➢ Specify the returned resource quantity.
➢ Click the **Update** button on the command bar.

After clicking **Update**, a print report 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.

If the quantity of returned items equals the quantity of picked items, the row corresponding to the resource disappears.

An additional “Waste” column is displayed on the “Operation kits give back” screen if the “Waste” module is currently in use. Use the “Waste” cell to 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.

- Read the barcode of the resource that must be returned to increase the returned quantity (one unit).

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

To return all the resources of a kit at once:

- Scan the main barcode of the kit.

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 stockroom to be used at need.

The procedures relating to the generic kits management can be summarized in three main phases:

1. generic kit creation (described in this section);
2. generic kits monitoring and management (described in this section);
3. generic kit association to a specific operation (described in section 17).

A specific procedure exists, to associate a generic kit to an emergency operation (this procedure is described in section 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 206).

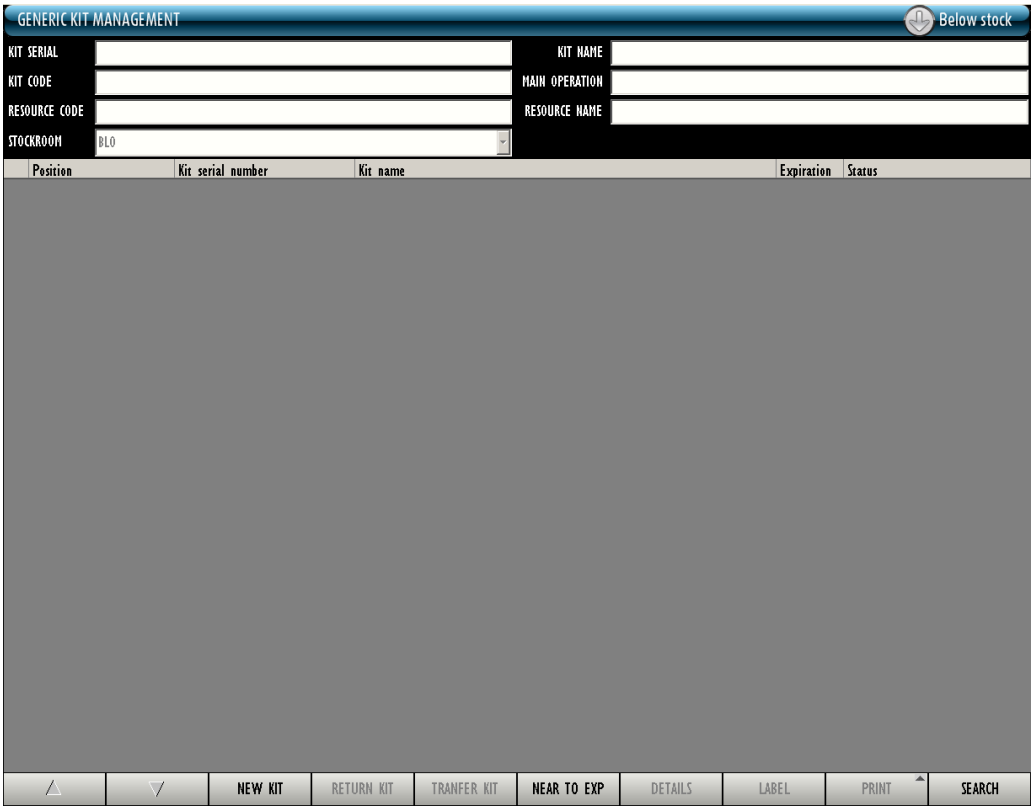


Fig 206 - Generic kits management

16.1. “Generic kit management” - Screen structure

The “Generic kit management” screen is structured as described in section 1.4. See section 1.4 for a description of the screen general features. This section describes the screen specific features.

16.1.1. Filters

Fig 207 - Filters on the “Generic kits management” screen

The filters available on the “Generic kits management” screen (Fig 207) are:

- “Kit serial” - specify the serial number of the kit that must be displayed.
- “Kit code” - specify the code of the kit that must be displayed.
- “Resource code” - 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” - 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” - specify the name of the kit that must be displayed.
- “Main operation” - specify the main operation to which the kit that must be displayed is associated. The list of all the kits associated to the main operation indicated in this filter is displayed (note: it is the name of a “standard operation”, not a specific intervention).
- “Resource name” - 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.

16.1.2. Data area

The data area displays the list of kits matching the values specified in the filters. To do that:

- Insert the available data in the search filters (Fig 208 **A**).
- Click the **Search** button on the command bar (Fig 208 **B**).

The list of kits matching the filters is displayed (Fig 208 **C**). If no value is specified, the list of all the existing kits is displayed.

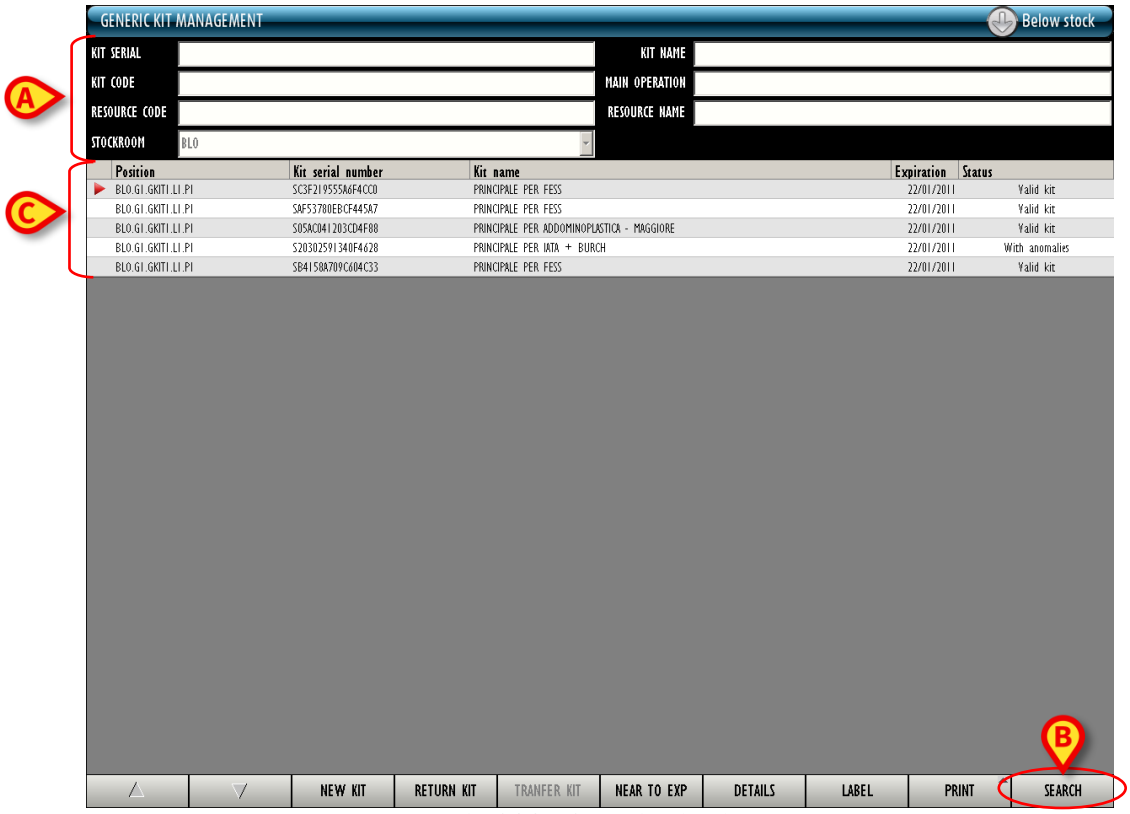


Fig 208 - Generic kits list

The kit search can be performed using a barcode reader. In this case a single row is displayed, corresponding to the kit whose barcode is scanned. If this kind of procedures is applyed, the following procedures "Kit return" and "Kit transfer" (described in sections 16.3 and 16.4) do not require the kit serial number or kit barcode specification.

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 belonging to the “standard” kit;
- kit with anomalies - it means that there are differences between the resources actually in the kit and the resources belonging to 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, for kit with anomalies, 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, for kit with anomalies, only the “return from kit” procedure can be activated.

The icon is displayed on the left of the selected kit.

16.1.3. Command bar

The command bar is shown in Fig 209.

Fig 209 - Command bar

Use the arrow buttons to scroll up and down the screen contents.
Use the **New Kit** button to create a new generic kit. The procedure is described in section 16.2.
The **Return Kit** button activates the “Generic kit return” procedure, described in section 16.3.
Use the **Transfer Kit** button to activate the “Generic kit transfer” procedure, described in section 16.4.
The **Near to Exp.** button, when selected, displays only those generic kits that are close to the expiration date. The proximity is set during configuration. The button, after clicked, appears as selected.
Use the **Details** button to display the details of a selected kit (see section 16.5).
The **Label** button prints the kit sticker label.
The **Print** button opens a menu containing two options (Fig 210).

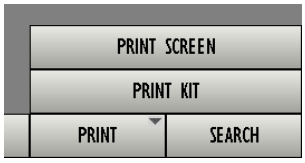


Fig 210

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 section 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 are 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 211).

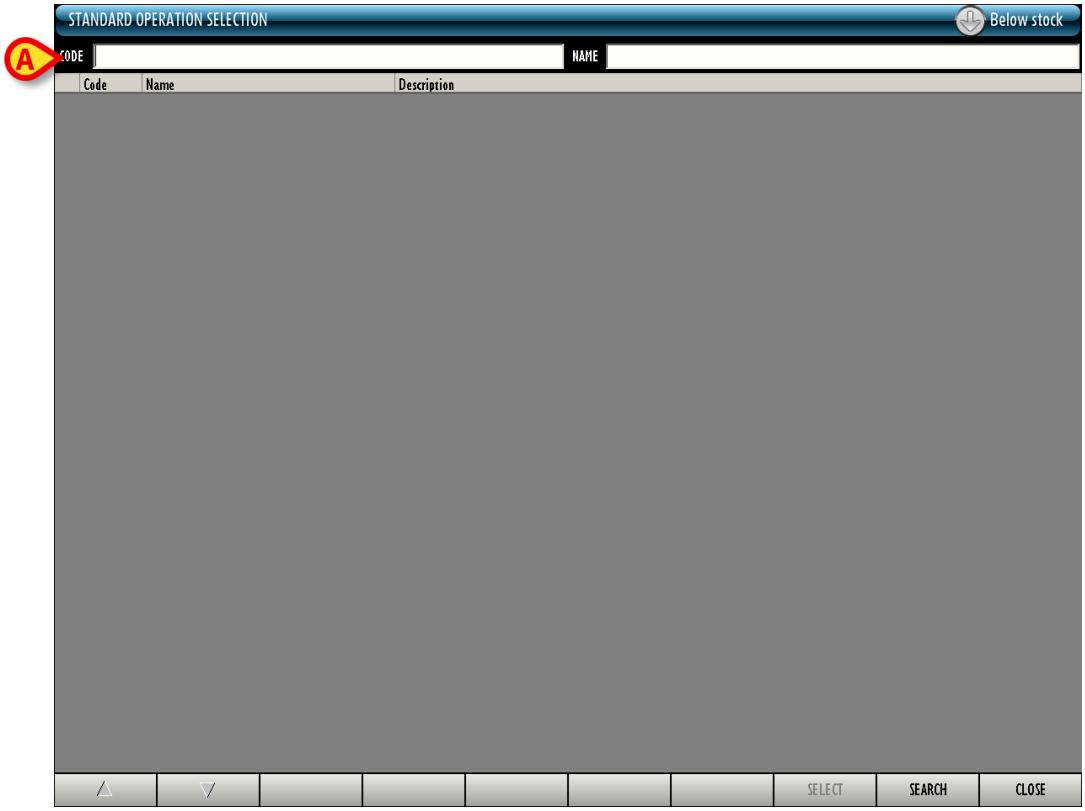


Fig 211 - Standard operation selection

This screen allows to specify the standard operation (i.e. the type of operation) for which the kit is created. Use the filters indicated in Fig 211 **A** to search for the relevant standard operation.

- Insert either the code or the name of the operation in the fields indicated Fig 212 **A**.
- Click the **Search** button on the command bar (Fig 212 **B**).
- The list of operations matching the specified values is displayed (Fig 212 **C**).

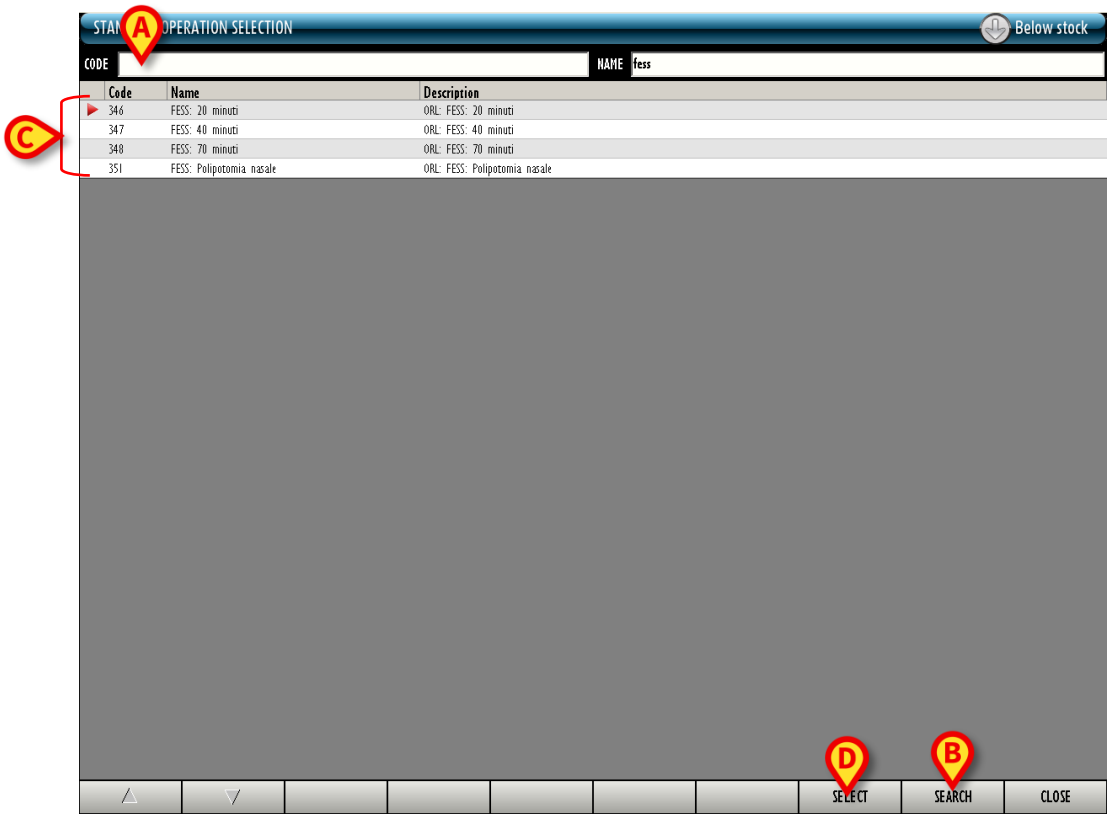


Fig 212

- Click the row corresponding to the required standard operation.

The icon is displayed on the left.

- Click the **Select** button on the command bar (Fig 212 **D**).

The following screen opens (Fig 213 - Standard kit selection).

Fig 213 - Standard kit selection

This screen displays the list of the possible kits for the standard operation previously selected.

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 on the left (Fig 214).

Fig 214 - 2 kits configured for the same operation

If one of the checkboxes is deselected the corresponding row changes as in Fig 215. Only the selected kits are prepared.

Fig 215 - Only one kit will be prepared

For each kit the available quantity is indicated (Fig 216 **A**).

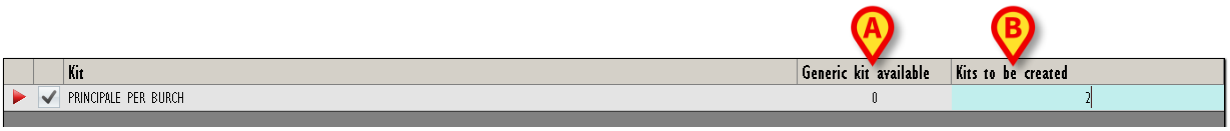
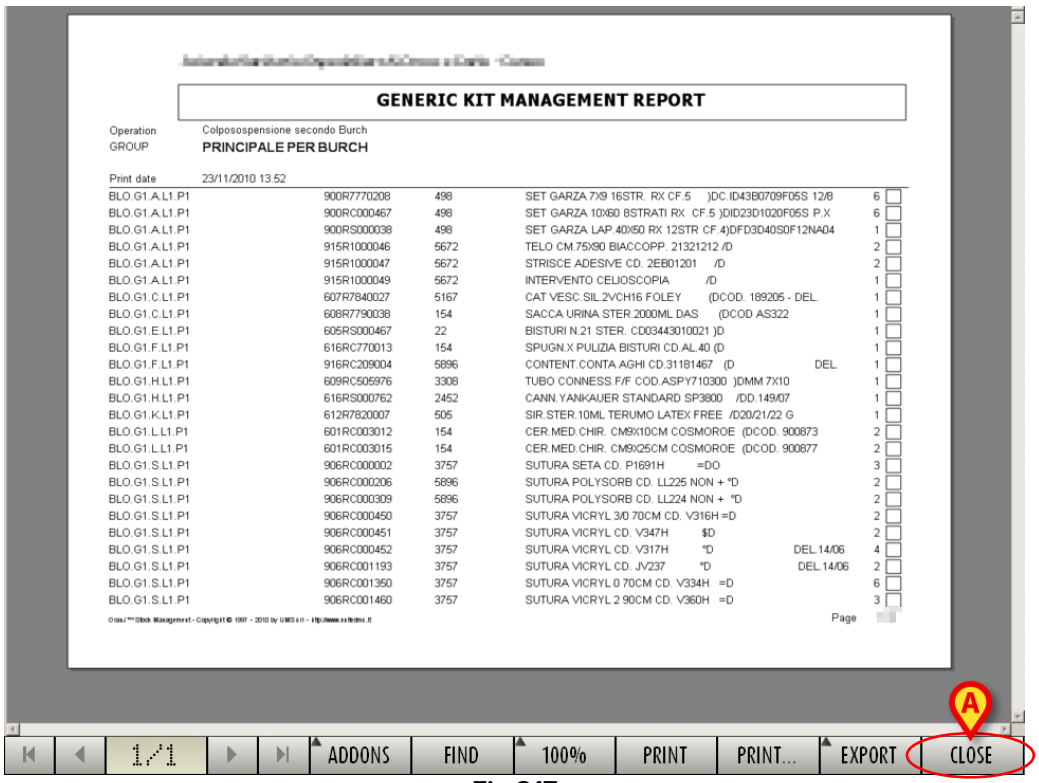


Fig 216

- Insert the number of generic kits to be created in the field indicated in Fig 216 **B**.
- Click the **Continue** button on the command bar (Fig 213 **C**).

A print report is generated, containing the list of resources that are part of the kit. A print preview is displayed (Fig 217).



GENERIC KIT MANAGEMENT REPORT

Operation Colposospensione secondo Burch
GROUP PRINCIPALE PER BURCH

Print date 23/11/2010 13:52

BLO.G1.A.L1.P1	900R7770208	498	SET GARZA 7X9 16STR. RX CF.5)DC.ID43B0709F05S 12/8		6
BLO.G1.A.L1.P1	900RC000467	498	SET GARZA 10X60 8STRATI RX CF.5)DID23D1020F05S P.X		6
BLO.G1.A.L1.P1	900RS000038	498	SET GARZA LAP.40X50 RX 12STR CF.4)DFD3D40S0F12NA04		1
BLO.G1.A.L1.P1	915R1000046	5672	TELO CM.75X90 BIACCOPP. 21321212 /D		2
BLO.G1.A.L1.P1	915R1000047	5672	STRISCE ADESIVE CD. 2EB01201 /D		2
BLO.G1.A.L1.P1	915R1000049	5672	INTERVENTO CELIOSCOPIA /D		1
BLO.G1.C.L1.P1	607R7840027	5167	CAT.VESC.SIL.2VCH16 FOLEY (DCOD. 189205 - DEL.		1
BLO.G1.C.L1.P1	608R7790038	154	SACCA URINA STER.2000ML DAS (DCOD AS322		1
BLO.G1.E.L1.P1	605RS000467	22	BISTURI N.21 STER. CD03443010021)D		1
BLO.G1.F.L1.P1	616RC770013	154	SPUGN.X PULIZIA BISTURI CD.AL.40 (D		1
BLO.G1.F.L1.P1	916RC209004	5896	CONTENT.CONTA AGHI CD.31181467 (D	DEL.	1
BLO.G1.H.L1.P1	609RC505976	3308	TUBO CONNESS.F/F COD.ASPY710300)DMM 7X10		1
BLO.G1.H.L1.P1	616RS000762	2452	CANN.YANKAUER STANDARD SP3800 /DD.149/07		1
BLO.G1.K.L1.P1	612R7820007	505	SIR.STER.10ML TERUMO LATEX FREE /D20/21/22 G		1
BLO.G1.L.L1.P1	601RC003012	154	CER.MED.CHIR. CM9X10CM COSMOROE (DCOD. 900873		2
BLO.G1.L.L1.P1	601RC003015	154	CER.MED.CHIR. CM9X25CM COSMOROE (DCOD. 900877		2
BLO.G1.S.L1.P1	906RC000002	3757	SUTURA SETA CD. P1691H =DO		3
BLO.G1.S.L1.P1	906RC000206	5896	SUTURA POLYSORB CD. LL225 NON + *D		2
BLO.G1.S.L1.P1	906RC000309	5896	SUTURA POLYSORB CD. LL224 NON + *D		2
BLO.G1.S.L1.P1	906RC000450	3757	SUTURA VICRYL 3/0 70CM CD. V316H =D		2
BLO.G1.S.L1.P1	906RC000451	3757	SUTURA VICRYL CD. V347H $D		2
BLO.G1.S.L1.P1	906RC000452	3757	SUTURA VICRYL CD. V317H *D	DEL.14/06	4
BLO.G1.S.L1.P1	906RC001193	3757	SUTURA VICRYL CD. JV237 *D	DEL.14/06	2
BLO.G1.S.L1.P1	906RC001350	3757	SUTURA VICRYL 0 70CM CD. V334H =D		6
BLO.G1.S.L1.P1	906RC001460	3757	SUTURA VICRYL 2 90CM CD. V360H =D		3

Page

Fig 217

- Close the print preview (Fig 217 **A**).

The generic kit creation screen opens (Fig 218). This screen is described in section 16.2.1.

Fig 218

- Insert the resources composing the kit (either manually or by barcode scan). See sections 14.6, 14.7 and 14.8 for the resources specification procedures.

- Specify the kit's expiration date in the field indicated in Fig 219 **B**.

- Specify the stockroom in which the kit will be located (use the field indicated in Fig 219 **C**). The stockroom specification is enabled only if several options are available.

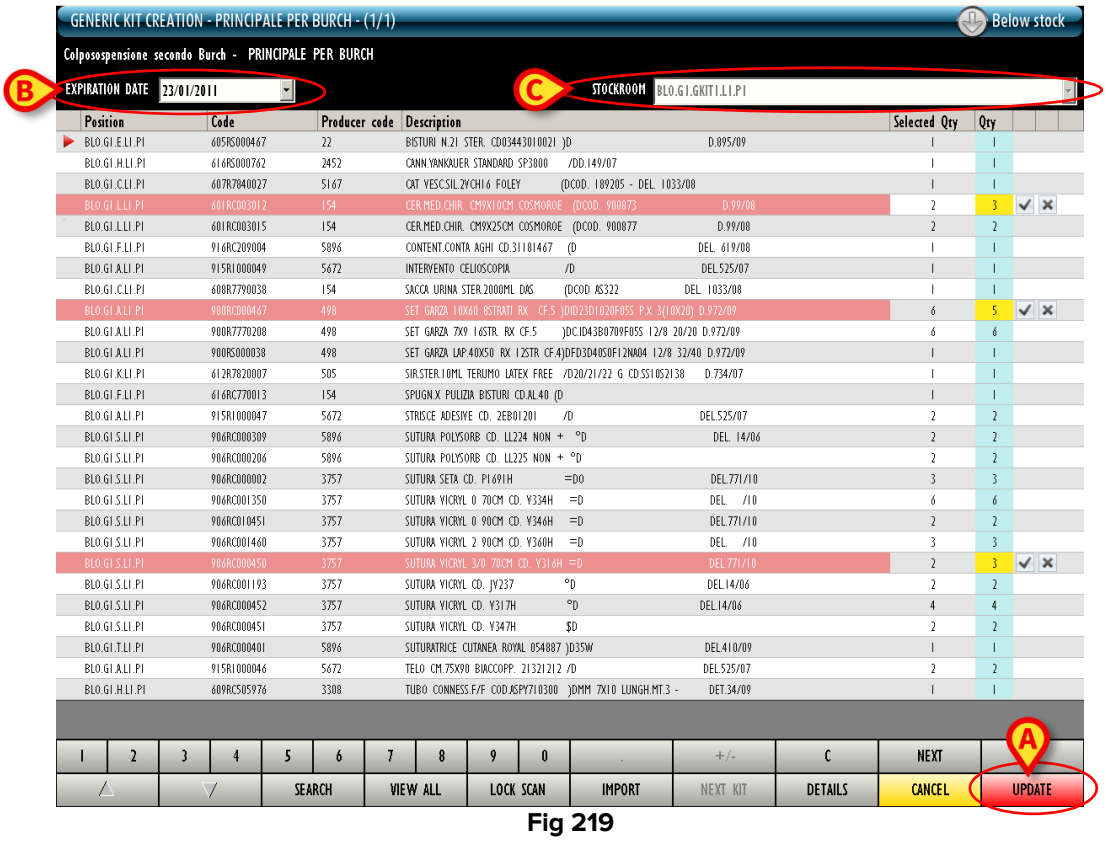


Fig 219

- Click the **Update** button on the command bar (Fig 219 **A**).

A window opens, allowing to specify the number of sticker labels to be printed (Fig 220).

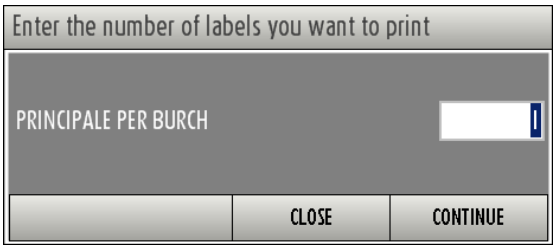
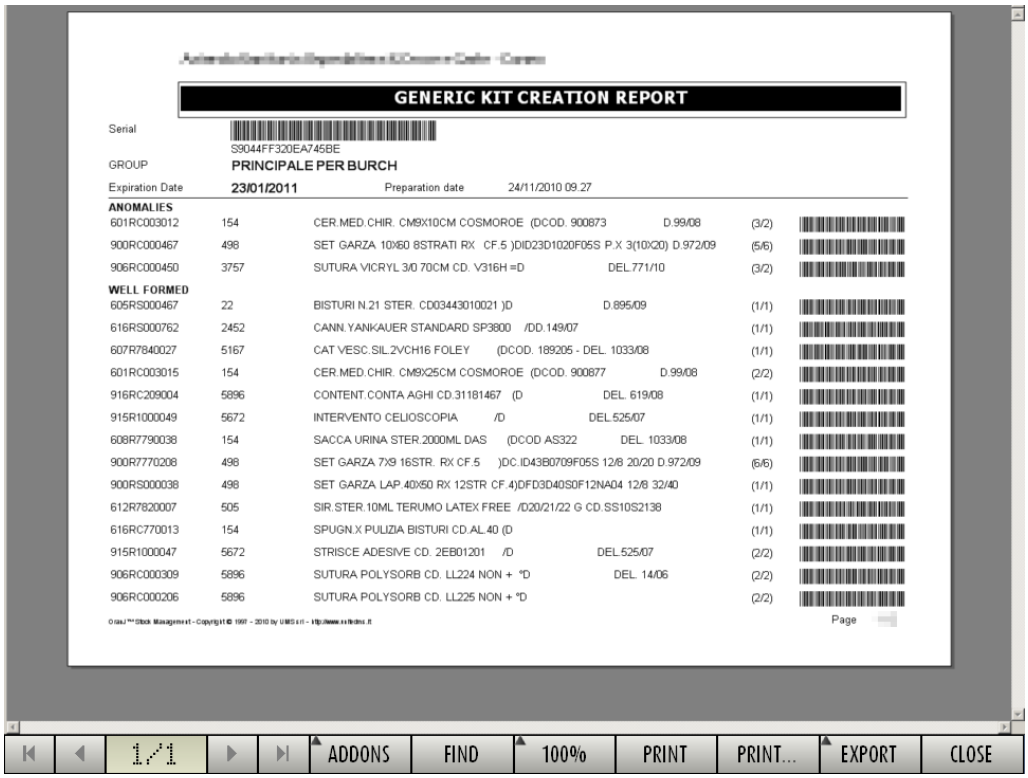


Fig 220

- Specify the number of labels.

- Click the **Continue** button on the window.

The labels are printed. A print report listing the resources is created. A print preview is displayed (Fig 221). According to the actual hospital procedures, this list can be used to accompany the kit.



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 221

- 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 213 **B**), after concluding the first kit, the creation procedure of the second kit starts (Fig 218). The screen header indicates the kit we are creating (in Fig 222 it is the second kit of three).

Fig 222

When the last kit is created the s generic kit management screen is displayed (Fig 208).

16.2.1. Generic kit creation screen description

The generic kit creation screen, shown in Fig 223, is formed of three main areas:

- the header (Fig 223 **A**);
- the data area (Fig 223 **B**);
- the command bar (Fig 223 **C**).

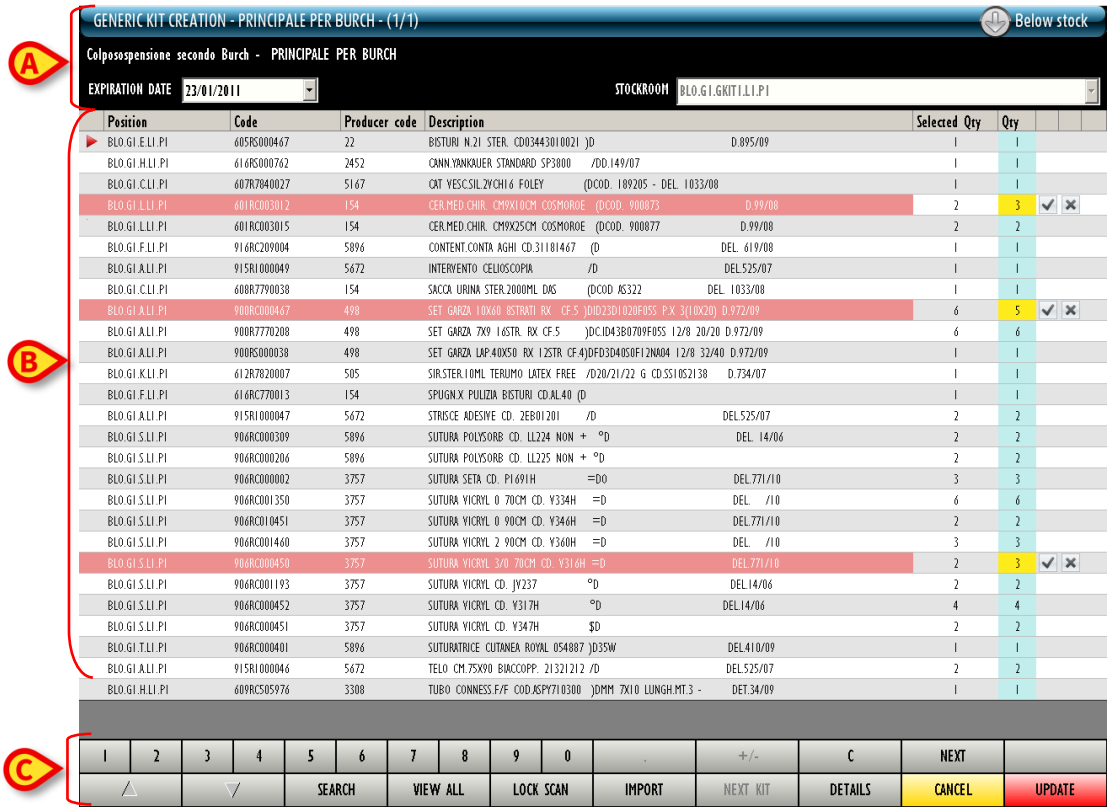


Fig 223

The following sections describe these three areas.

16.2.1.1. Header

The header displays, in the blue bar on top of the page, the name of the kit ("Principale per IATA..." in the example shown in Fig 224) and the kit number if multiple kits are created (2/3 in the example).

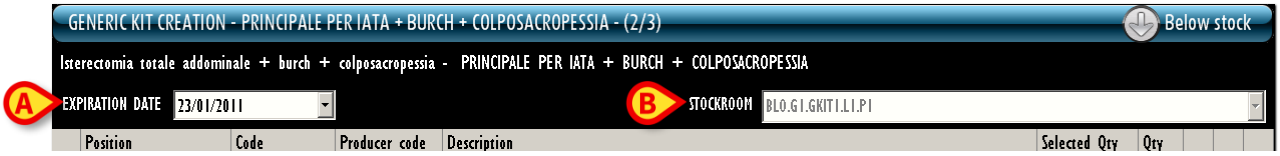


Fig 224 - Header

Under the blue bar the name of the kit is displayed again.

The field indicated in Fig 224 **A** allows to specify the expiration date of the kit.

The field indicated in Fig 224 **B** allows to specify the destination stockroom of the kit. The field is enabled only if different 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 223 **B**).
The list “grows” as the resources are inserted (either manually or by barcode scan). Each row corresponds to a resource (Fig 225).

Position	Code	Producer code	Description		Selected Qty	Qty
BLO.GI.E.LI.PI	605RS000467	22	BISTURI N.21 STER. CD03443010021)D	D.895/09	2	2

Fig 225 - Resource

The information that can be provided for each resource is:

- position from which the resource is picked;
- resource code;
- producer code;
- resource description;
- required quantity;
- recorded quantity.

The ▶ icon on the left of a row indicates the selected row.
The mandatory fields are highlighted light blue.
If there are yellow fields, as shown in Fig 226, the missing information must be specified by the user (Fig 226).

Position	Code	Producer code	Description		Selected Qty	Qty
	605RS000467	22	BISTURI N.21 STER. CD03443010021)D	D.895/09	2	2

Fig 226

Click the field and type the information required. If configured, a drop down menu containing the possible options is displayed (Fig 227).

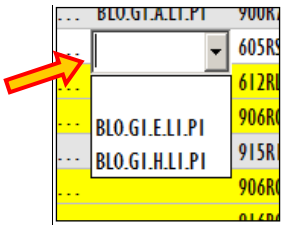


Fig 227 - Selection

16.2.1.3. The command bar

The command bar is shown in Fig 228.

Fig 228 - Command bar

Use either the numeric buttons in the upper row (Fig 229) or the workstation keyboard to manage the numeric data (quantities, for example).

Fig 229 - Numeric buttons

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 sets to zero the specified quantities.
The **Next** button selects the item following the one currently selected.

Use the arrow buttonsto scroll up and down the screen contents.
Use the **Search** button to access the system's search functionalities (described in section 22).
Use the **View All** button to display the complete list of resources required for the selected kit. See section 14.6.6 for a description of this functionality.
Use the **Lock Scan** button to lock the workstation while reading barcodes that will be downloaded later. See section 14.6.3 for a description of the related procedures.
Use the **Import** button to import the scanned items using a wireless barcode reader with internal memory. See section 14.6.5 for the instructions relating to this option.
Use the **Next Kit** button to skip to the successive kit. For example: if the second kit is prepared of four required, this button can be clicked to directly create the third kit.
Use the **Details** button to create a print report listing the resources that are part of the kit (an example is shown in Fig 217).
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.
Click **Update** to save.
Click **Cancel** to discard the changes.

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 sctions 14.6, 14.7 and 14.8 for a description of these procedures.
The procedure described in section 14.6.4 ("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 230),

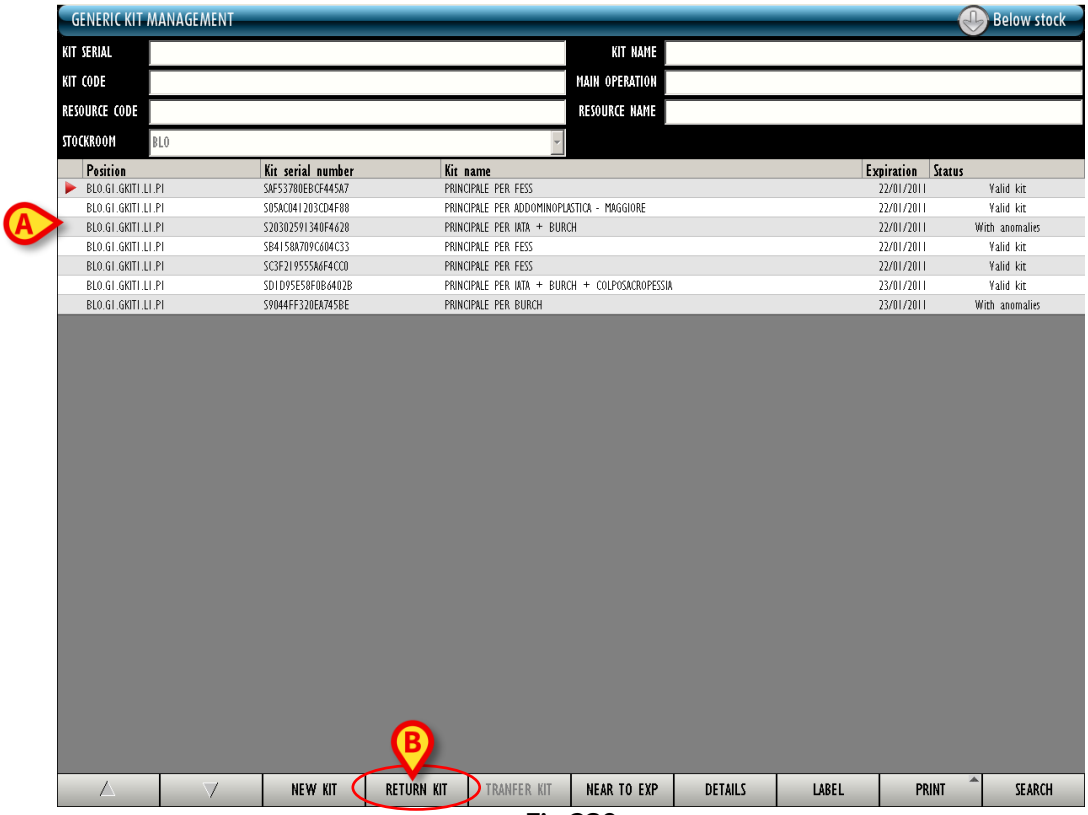


Fig 230

- Click the row corresponding to the kit that must be returned.

The ▶ icon is displayed on the left (Fig 230 **A**).

- Click the **Return Kit** button on the command bar (Fig 230 **B**).

The following screen opens (Fig 231).

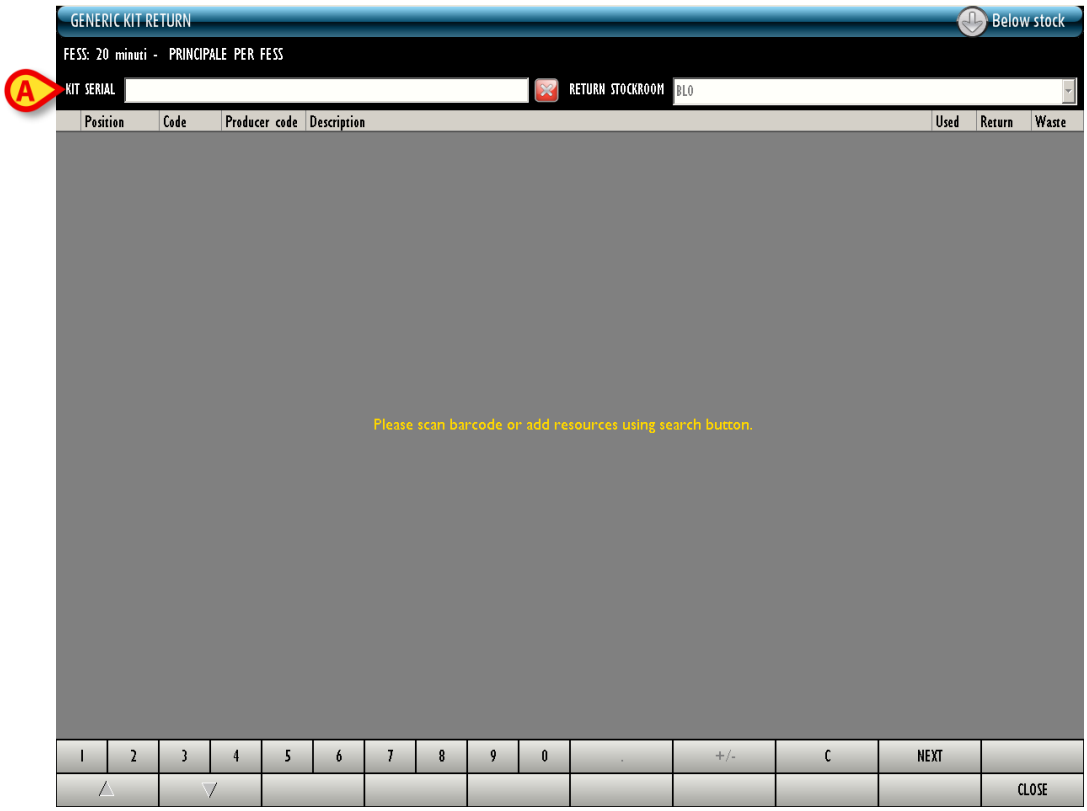


Fig 231 - Generic kit return

- Insert the kit serial number in the field indicated in Fig 231 **A**, (or scan the barcode of the kit).

If, in the generic kit management screen (Fig 230), 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. The serial number of the previously selected kit is already displayed.

If the serial number is correct, the screen changes in the way shown in Fig 232, 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 the stockroom specification is required.

The procedure described in this section returns the whole kit at once. In case of "Wasted" resources, these can be indicated.

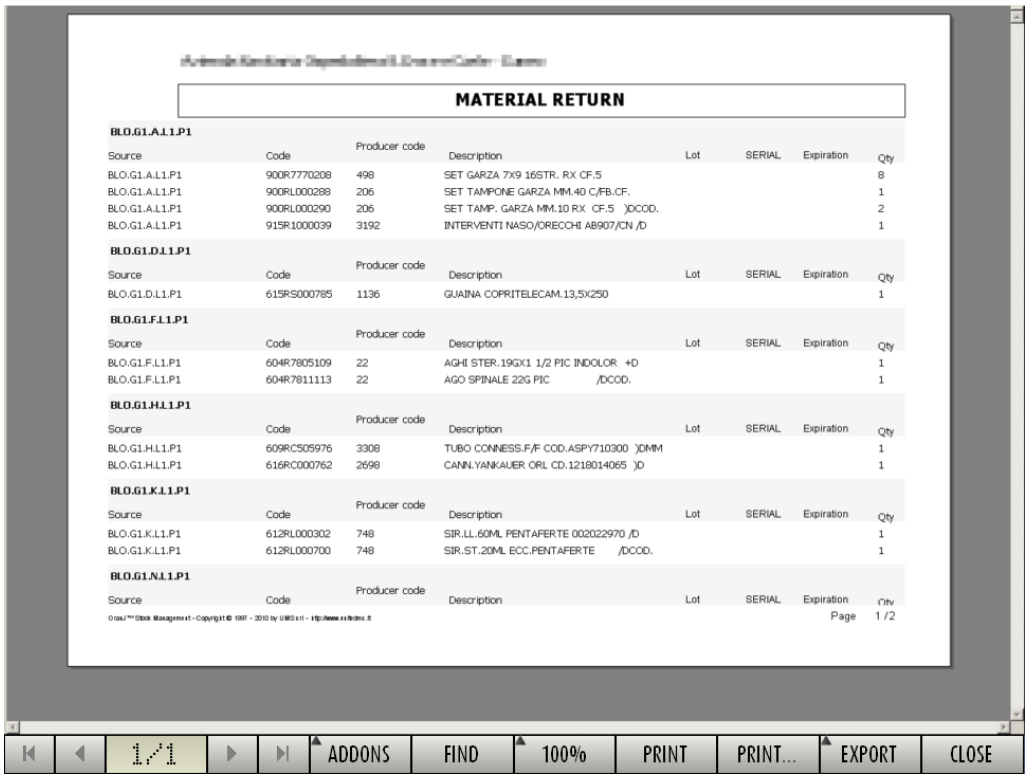
Fig 232

If there are “Wasted” resources, these can be indicated in the “Waste” cell on the right (Fig 232 **A**).

- 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 233). 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 233

Close the print preview screen. The generic kits management screen is displayed again (Fig 234).

16.4. How to transfer a generic kit

To transfer a generic kit, on the generic kit management screen (Fig 234),

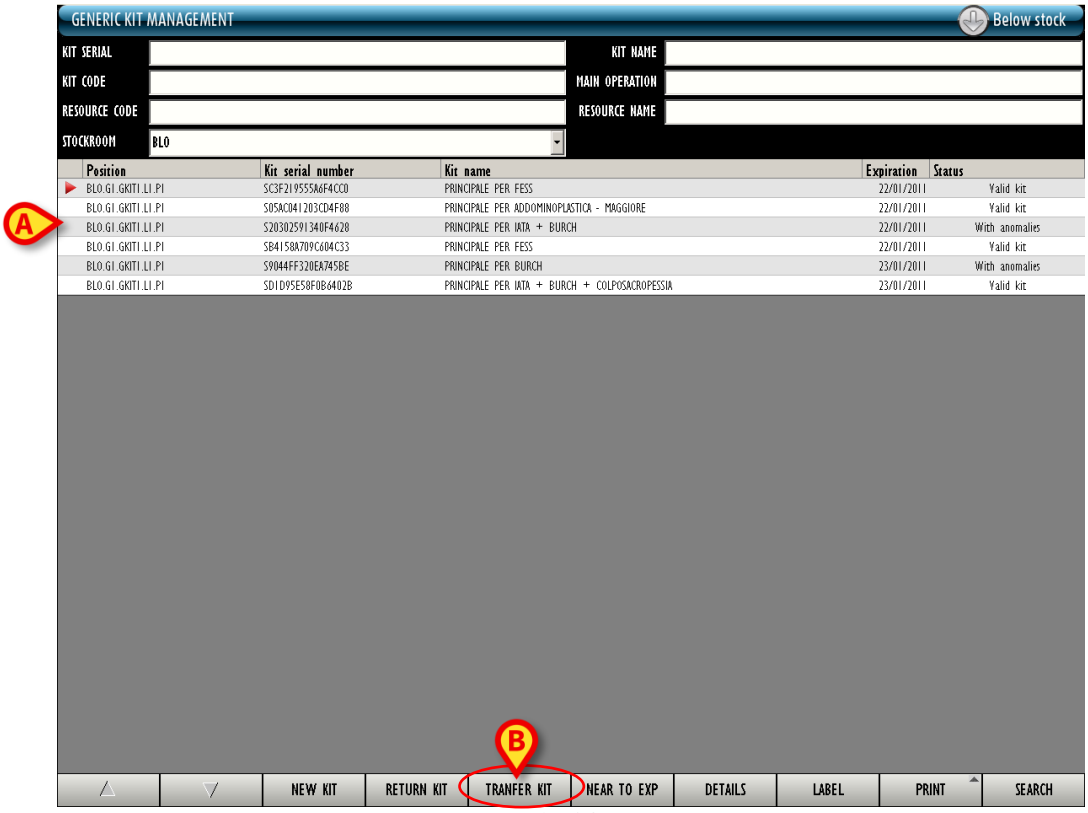


Fig 234

- Click the row corresponding to the kit that must be transferred.

The ▶ icon is displayed on the left (Fig 234 **A**).

- Click the **Transfer Kit** button on the command bar (Fig 234 **B**).

The following screen opens (Fig 235).

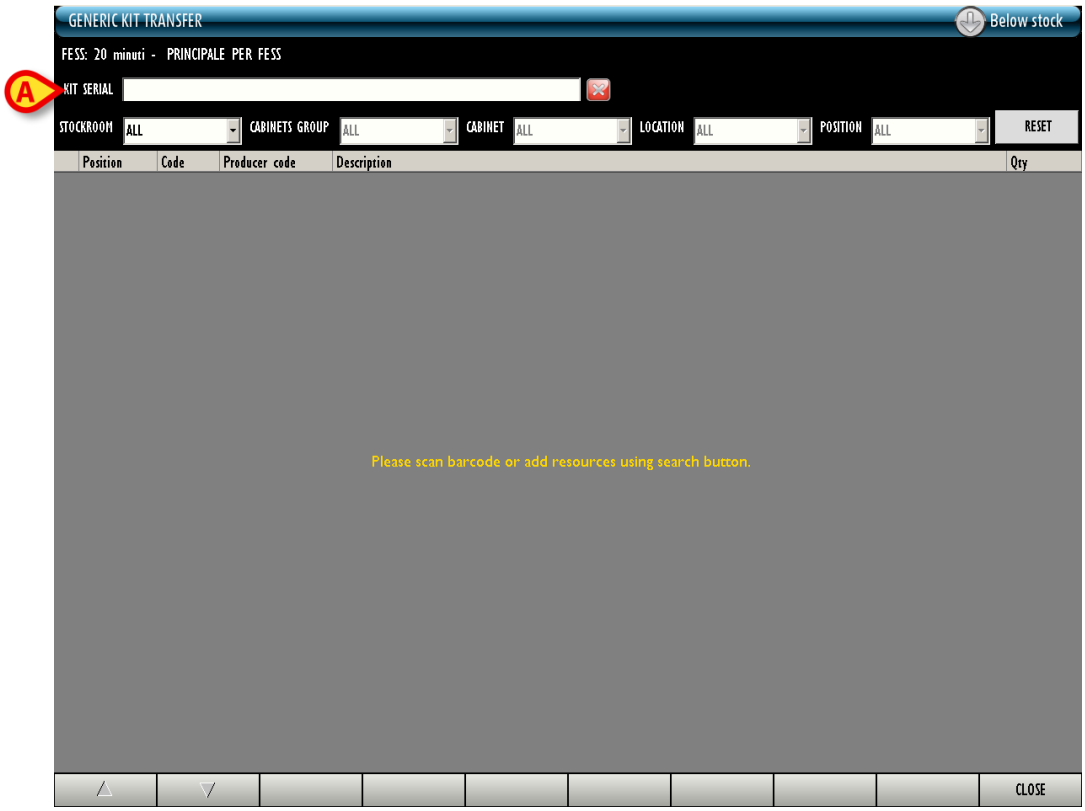


Fig 235

- Insert the kit serial number in the field indicated in Fig 235 **A** (or scan the kit barcode).

If, in the generic kit management screen (Fig 234) 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. The serial number of the previously selected kit is already displayed.

- Specify the destination stockroom in the field indicated in Fig 236 **A**.

The screen changes to display the list of resources that will be transferred (Fig 236).

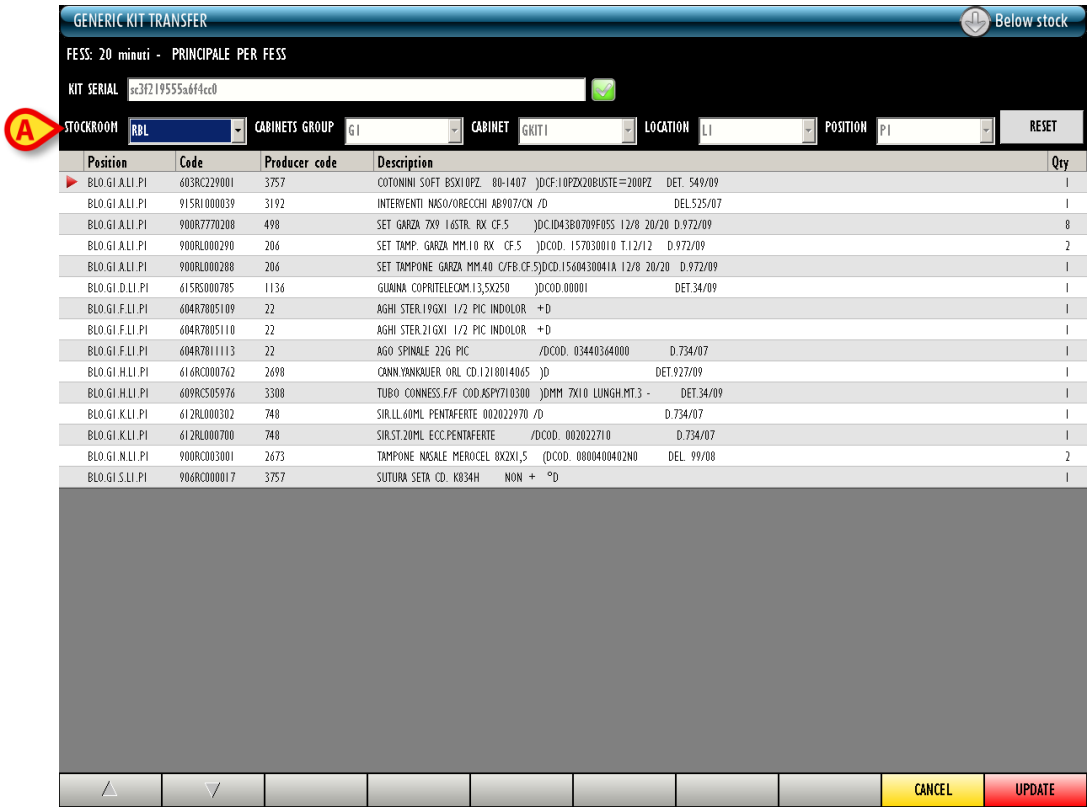


Fig 236

- Specify, in the “Cabinet group”, “Cabinet”, “Location”, “Position” fields (indicated in Fig 236 **A**) the new destination for the kit. 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 234).

16.5. How to display the kit details

To display the details of a generic kit, on the generic kits management screen (Fig 237),

Fig 237

- Click the row corresponding to the kit whose details must be displayed.

The ▶ icon is displayed on the left (Fig 237 **A**).

- Click the **Details** button on the command bar (Fig 237 **B**).

The screen changes in the following way (Fig 238). The details of the selected kit are displayed in the area shown in Fig 238 **A**.

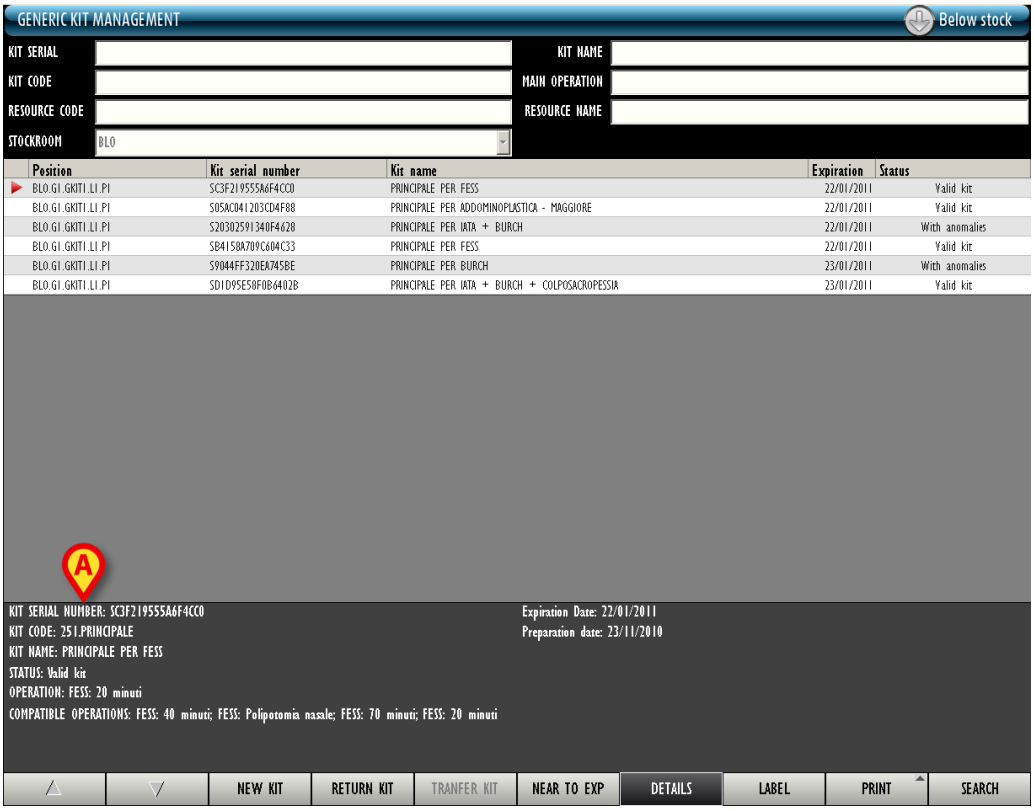

GENERIC KIT MANAGEMENT
Below stock
KIT SERIAL
KIT NAME
KIT CODE
MAIN OPERATION
RESOURCE CODE
RESOURCE NAME
STOCKROOM
BL0
Position
Kit serial number
Kit name
Expiration
Status
BL0.G1.GKIT1.L1.P1 SC3F219555A6F4CC0 PRINCIPALE PER FESS 22/01/2011 Valid kit
BL0.G1.GKIT1.L1.P1 S05AC041203CD4F88 PRINCIPALE 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 238

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 239).

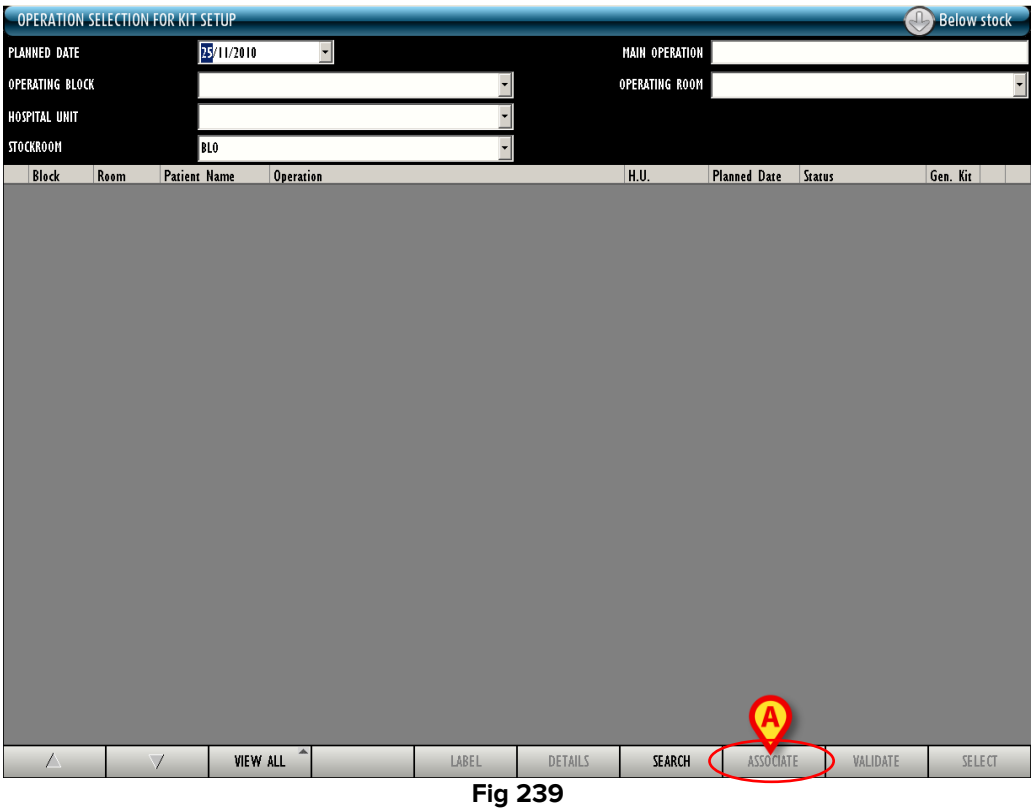


Fig 239

The “Operation selection for kit setup” screen and the related procedures are described in section 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 240 it is an “Addominoplastica” operation.

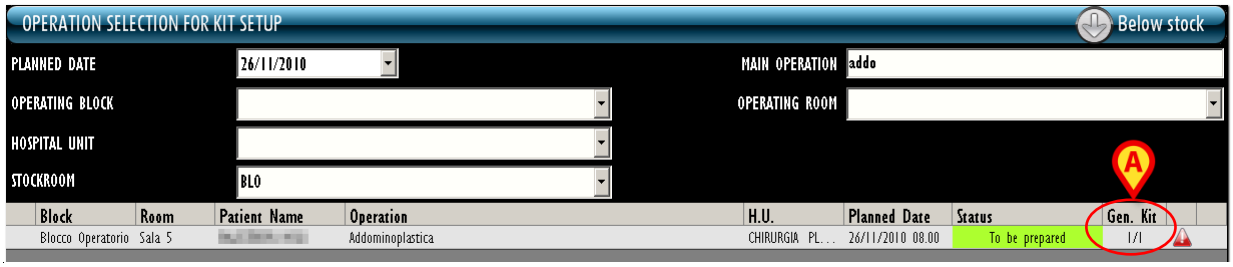


Fig 240

The cell indicated in Fig 240 **A** and enlarged in Fig 241 displays the quantity of generic kits available for the selected operation. In the example, there is 1 kit available on 1 required (1/1).

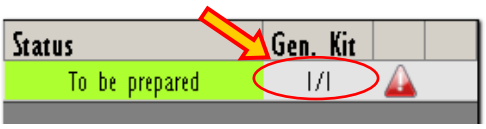


Fig 241

- Click the row corresponding to the operation to which the generic kit must be associated.

The operation is this way selected. The ▶ icon is displayed on the left.

- Click the **Associate** button on the command bar (Fig 239 **A**).

The "Kit composition for an operation" screen opens (Fig 242). See section 14.2 for a description.

Fig 242

For each kit, the number of compatible generic kits is indicated (Fig 242 **A**).

- Click the **Associate** button to associate the kit to the selected operation (Fig 242 **B**).

The screen changes in the following way (Fig 243).

Fig 243

- Click the **Continue** button on the command bar (Fig 243 **A**).

A print report containing the list of items to be picked is created. A print preview is displayed (Fig 244). The report can be used to actually pick the resources.

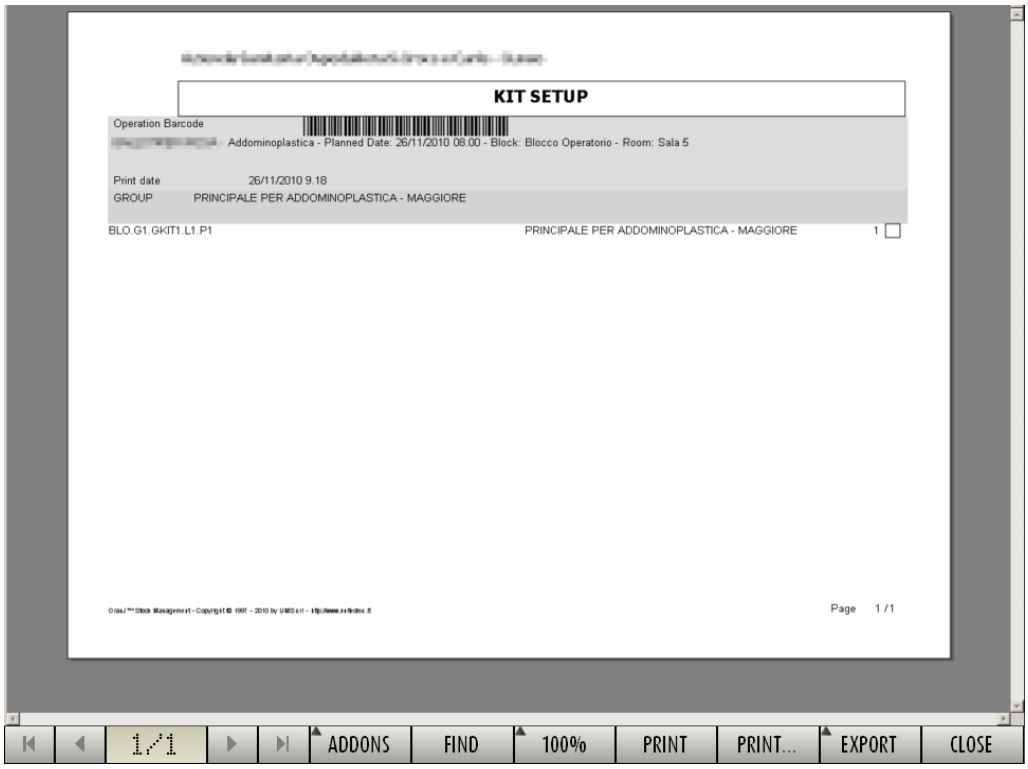


Fig 244

- Close the print preview.

The “Kit creation for an operation” screen is displayed (Fig 245, described in section 14.2).

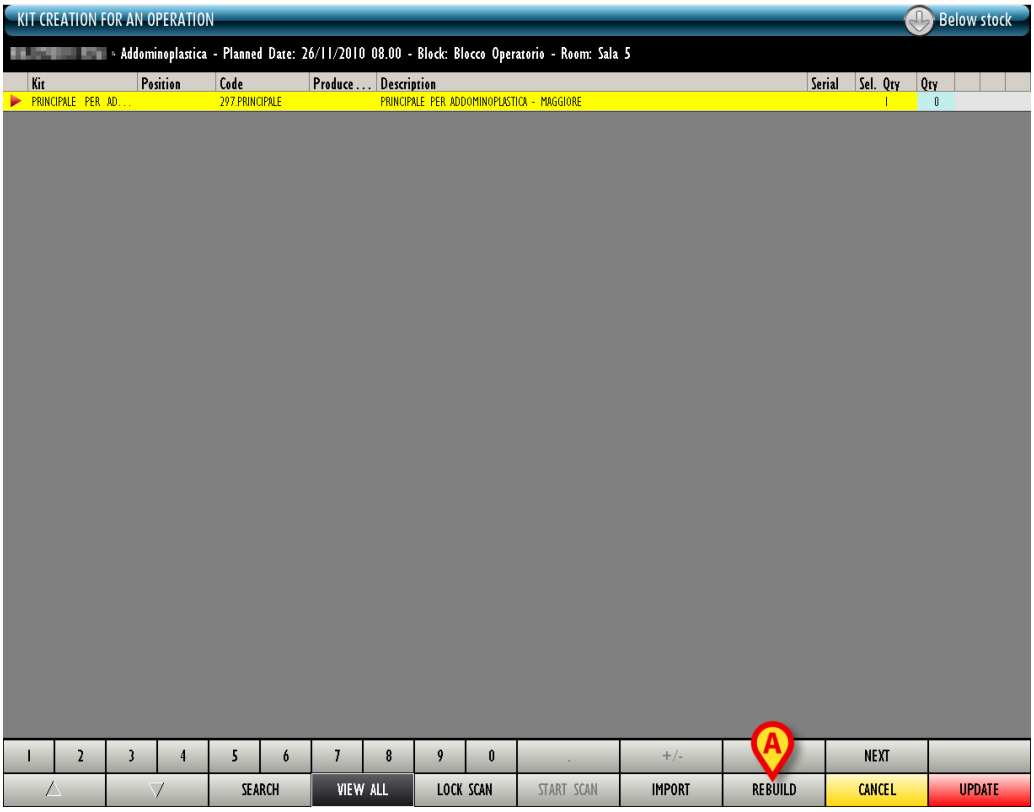


Fig 245

- Specify, where required, the data relating to the kit to be picked: the quantity, the serial number, the actual position of each kit (Fig 246).

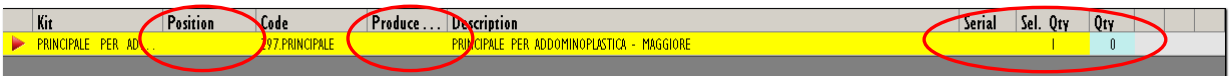


Fig 246

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

If necessary, the kit can be rebuilt by specifying the resources again. Use the **Rebuild** button to do that (Fig 245 **A**). The resources specification procedure (described in section 14.6) is activated again.

A pop-up window is displayed, requiring to specify the number of labels to be printed.

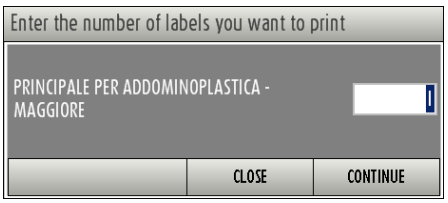


Fig 247

After specification,

- Click the **Continue** button.

The labels are printed. The print report accompanying the kit is created. A print preview is displayed (Fig 248).

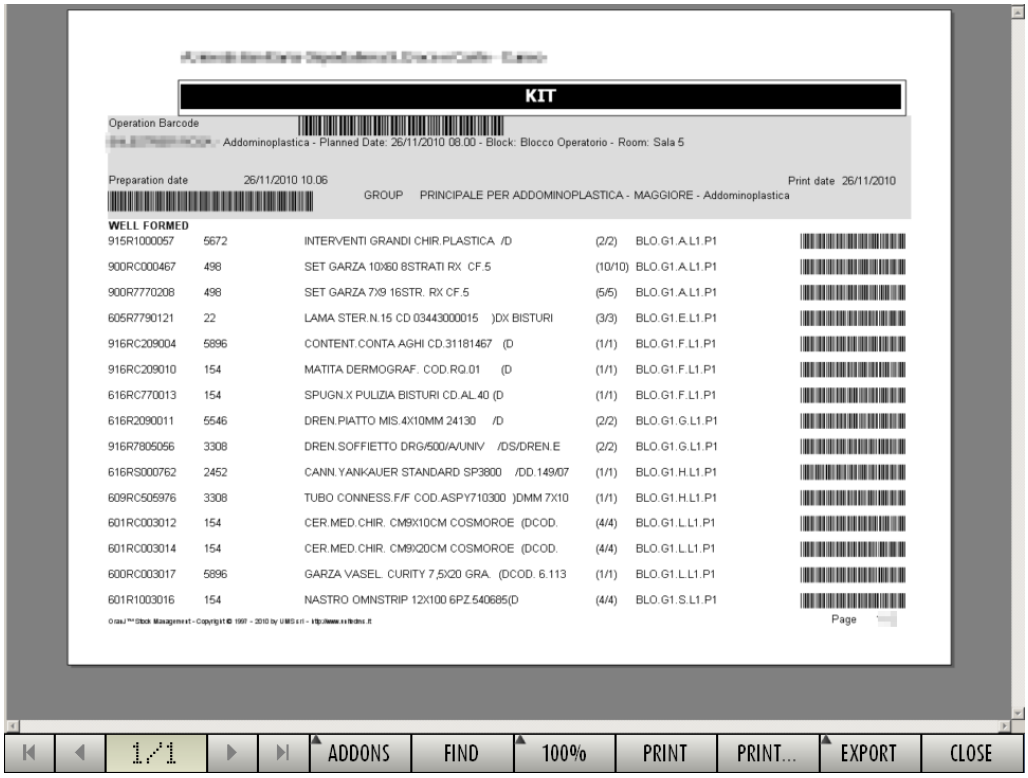


Fig 248

- Close the print preview.

The generic kit association procedure is completed. The “Operation selection for kit setup” screen is displayed again (Fig 249).

The status of the operation for which the association procedure was performed is now “Prepared” (Fig 249 **A**).

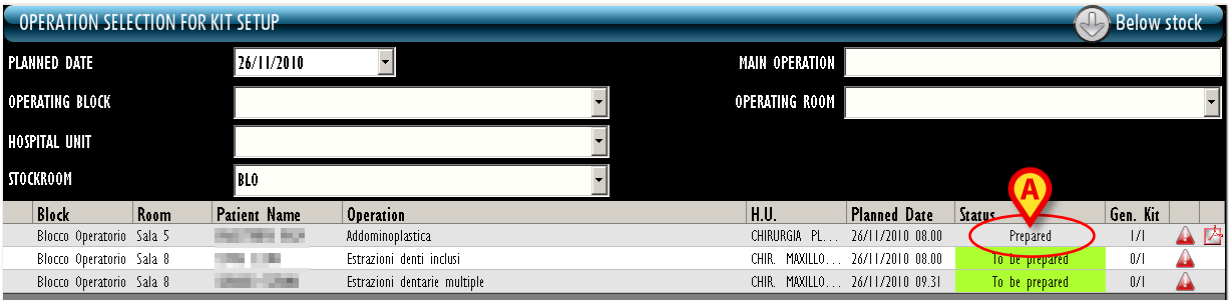


Fig 249

18. Generic kit association to an emergency operation

A specific procedure allows to associate a generic kit to an emergency operation.
To do that,

- Click the icon on the lateral bar.

The following screen opens (Fig 250).

Fig 250

The screen is formed of two areas. The upper area applies to the patient and operation to which the kit must be associated (Fig 250 **A**). The lower area applies to the kit to be associated (Fig 250 **B**).

- Either insert the patient code in the field indicated in Fig 250 **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 251 - see the document USR ENG OranJ for an explanation of the operation status).

- Click the row corresponding to the operation to which the kit must be associated.

The operation is this way selected. The ▶ icon is displayed on the left (Fig 251).

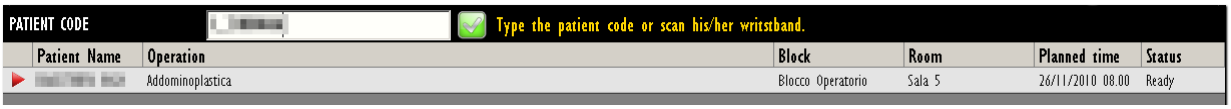


Fig 251

- Insert, in the field indicated in Fig 250 **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 252 **A**).

A row corresponding to the kit to be associated is displayed (Fig 252 **B**).

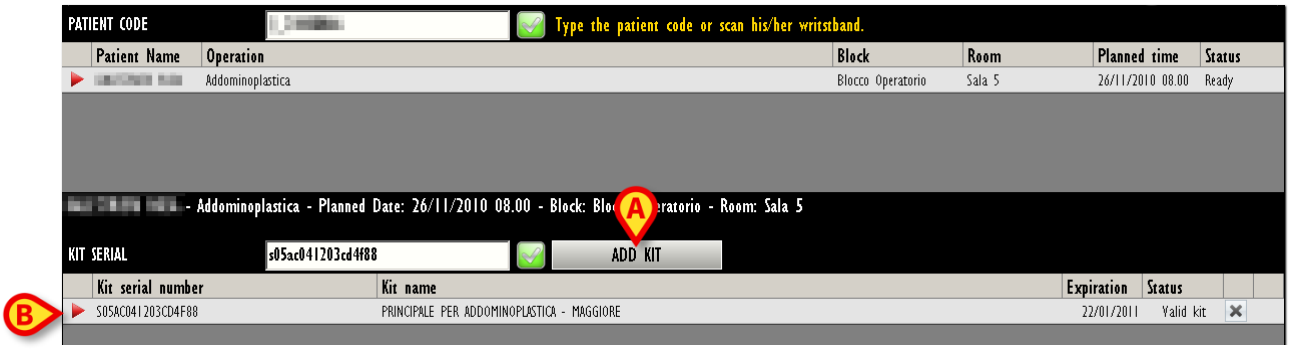


Fig 252

- 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 253)

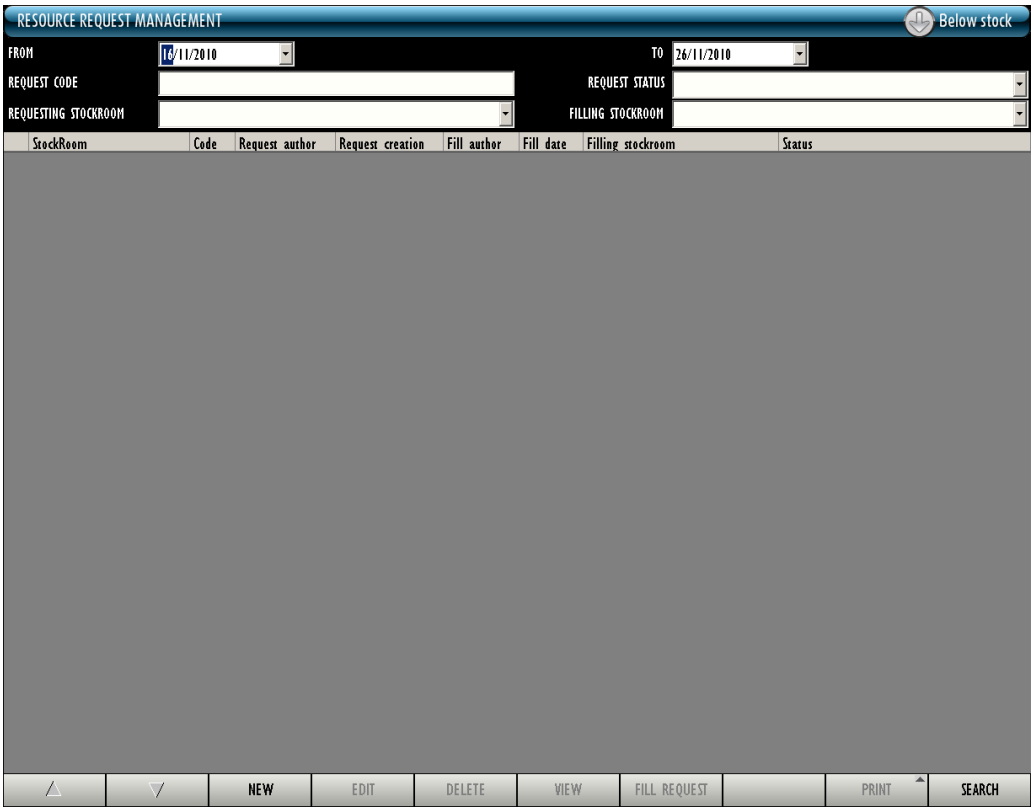


Fig 253 - Materials requests management

The “materials request” procedure activates when one of the configured stockrooms requires a certain resource and requests it to another stockroom.

19.1. “Requests management” - Screen structure

The “Requests management” screen is structured as described in section 1.4. See section 1.4 for a description of the screen general features. This section describes the screen specific features.

19.1.1. Filters

Fig 254 - Filters on the “Requests management screen”

The filters available on the “Requests management screen” (Fig 254) are:

- “Start date” (“From” field) and “End date” (“To” field): specify a relevant period. The requests displayed in the data area (see section 19.1.2) all refer to the time span here specified.
- “Request code” - specify the code of the request that must be displayed.
- “Request status” - display the requests that are in a certain status.
- “Requesting stockroom” - indicate the requesting stockroom.
- “Filling stockroom” - indicate the filling stockroom.

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 255 **A**).
- ➢ Click the **Search** button on the command bar (Fig 255 **B**).

The list of requests is displayed (Fig 255 **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 255 - 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 initials of the user who recorded the request;
- the request creation date;
- the initials 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.

All data is read-only. The icon indicates the selected request.

19.1.3. The command bar

The command bar is shown in Fig 256.

Fig 256 - Command Bar

Use the arrow buttons to scroll up and down the screen contents.
Use the **New** button to create a new request (see section 19.2 for the procedure).
Use the **Edit** button to edit a selected request (see section 19.3).
Use the **Delete** button to delete a selected request (see section 19.4).
Use the **View** button to display the details of a selected request (see section).
Use the **Fill Request** button to activate the request filling procedure (described in section 19.6).
The **Print** button displays two print options (Fig 257).

Fig 257

The “Print requests” option creates a record containing the list of all the existing requests.
The “Print selected request” option creates a 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 section 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 258).

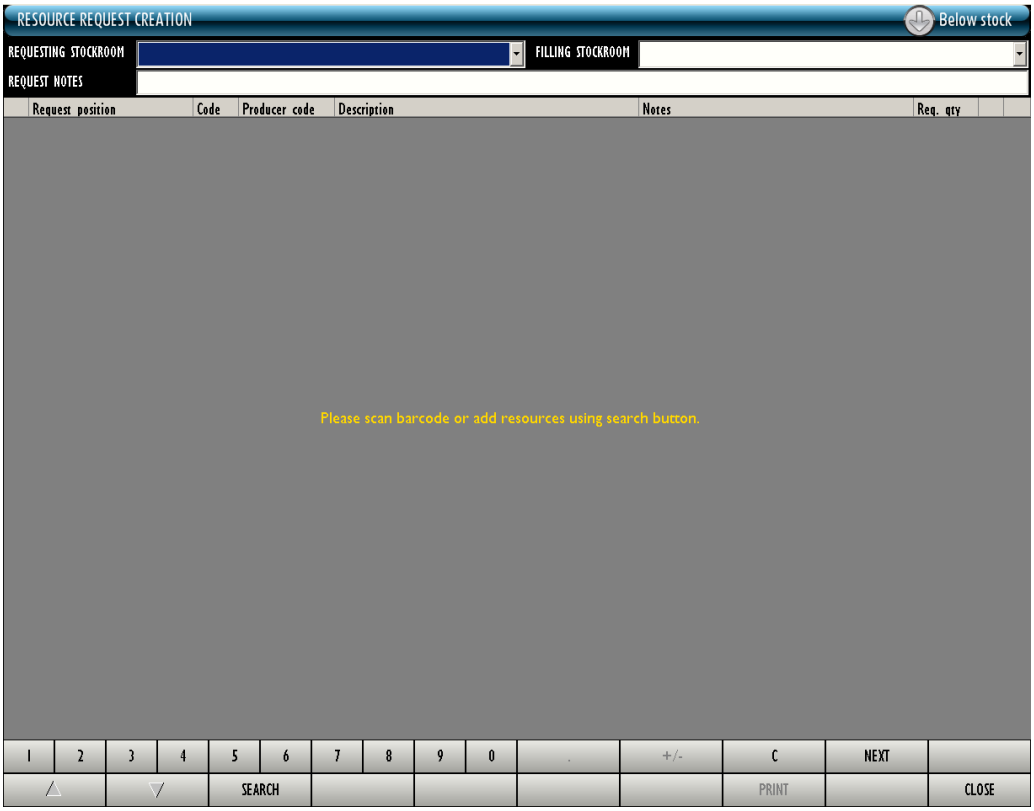


Fig 258

- Specify the requesting and filling stockrooms in the fields shown in Fig 259.
- Insert, if necessary, request notes in the “Request notes” field (free text field).

Fig 259

- Insert the resources to be requested.

The resources can be inserted either by barcode scan or manually (i.e. activating the search functionality - **Search** button on the command bar). The manual search and selection procedure is described in section 22.

The list of resources is displayed (Fig 260).

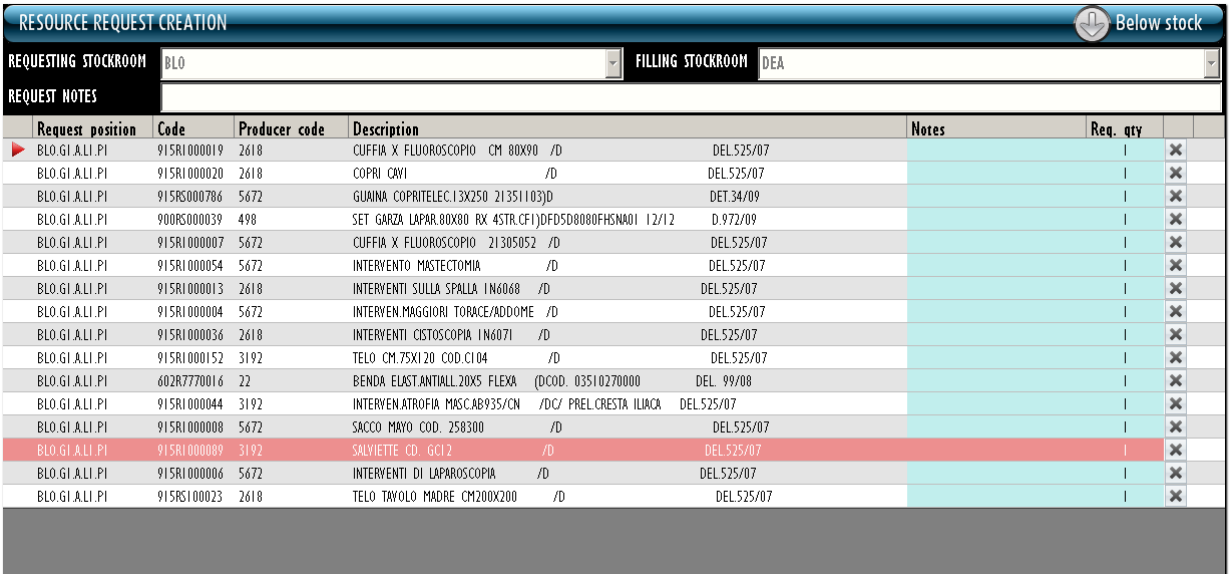


Fig 260 - Requested resources list

- Specify the quantity of each requested resource in the “Requested quantity” cell indicated in Fig 261 **B** (default quantity is 1).

It is possible to insert a specific note for each resource (Fig 261 **A**).

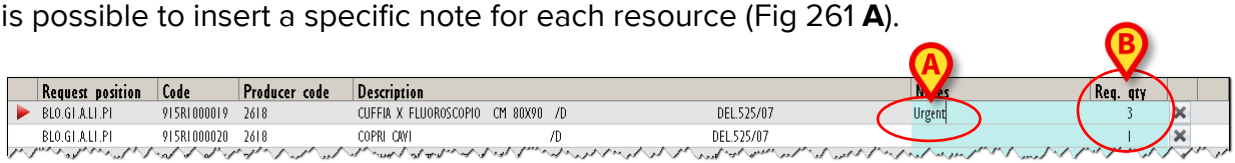


Fig 261

The icon indicates the selected resource.

The icon on the right can be clicked to delete the corresponding resource.

The cancelled resources are displayed as shown in Fig 262. The icon displayed at the end of the cancelled row is an “Undo” button.

Fig 262 - Cancelled resource

The rows highlighted pink (Fig 263) correspond to resources that are not available in the filling stockroom. The request can still be created.

Fig 263 - Unavailable resource

When the resources list is complete,

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

The request is 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 264 **A**) to display the row corresponding to the request that must be edited.

Fig 264 - Requests management

- Click the relevant row.

The icon is displayed on the left (Fig 264 **B**).

- Click the **Edit** button on the command bar (Fig 264 **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 265).

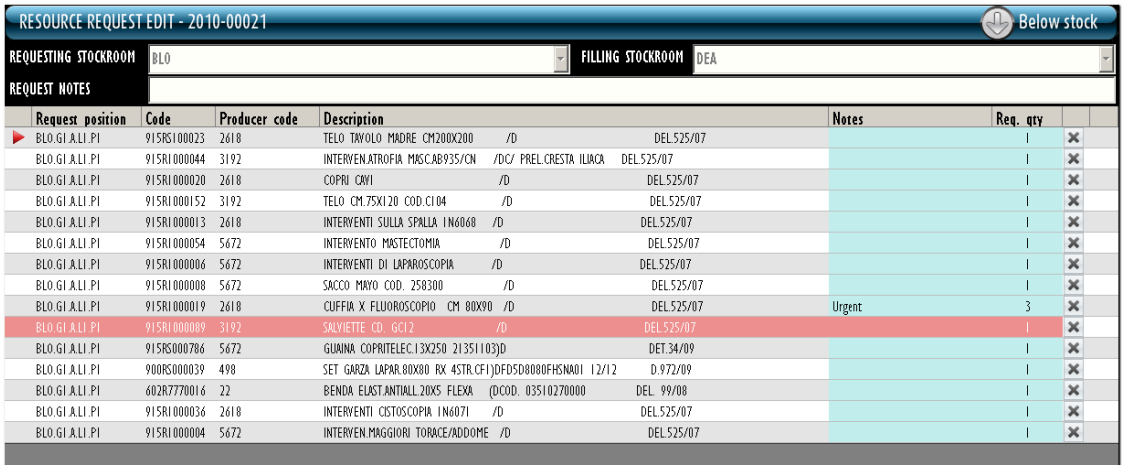


Fig 265

- Edit the request (i.e. change quantities, add or remove resources).
- 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 266 **A**) to display the row corresponding to the request that must be deleted.

Fig 266 - Gestione richieste

- Click the relevant row.

The icon is displayed on the left (Fig 266 **B**).

Click the **Delete** button on the command bar (Fig 266 **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.

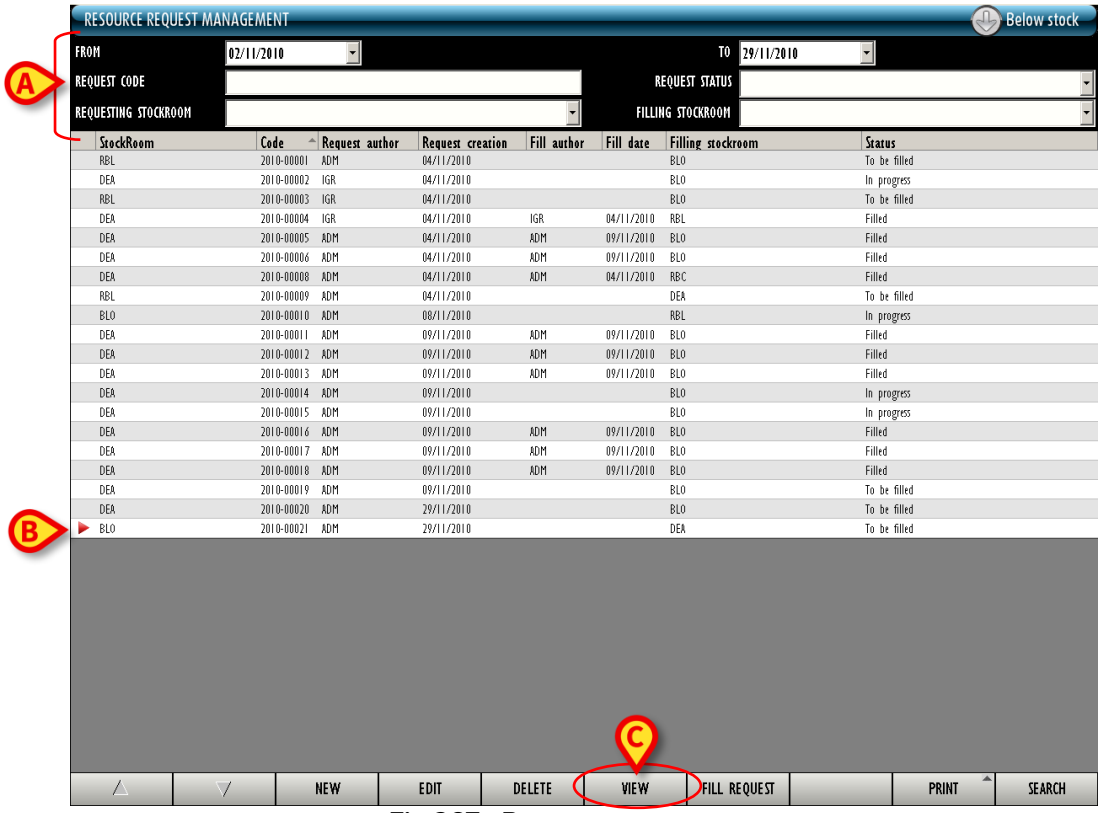
User confirmation is required.

- Click Yes to delete the request.

19.5. How to display the deatils of a request

To display the list of resources of a request:

- Use the filters on the “Requests management” screen (Fig 267 **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 267 - Requests management

- Click the row.

The icon is displayed on the left (Fig 267 **B**).

- Click the **View** button on the command bar (Fig 267 **C**).

The list of requested resources is displayed. The list is “read-only”.

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 268 **A**) to display the row corresponding to the request to be filled.

Fig 268 - Requests management

- Click the relevant row.

The icon is displayed on the left (Fig 268 **B**).

- Click the **Fill Request** button on the command bar (Fig 268 **C**).

The following screen opens (Fig 269 - “Resource request filling”).

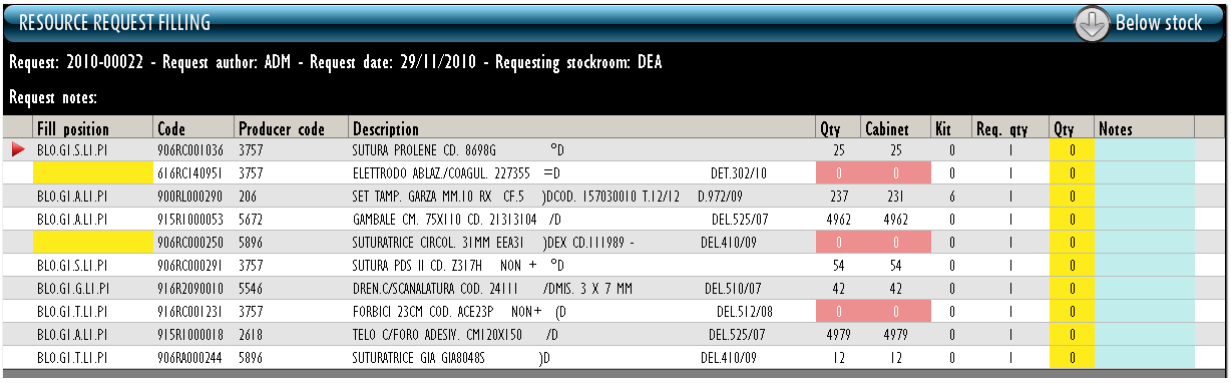


Fig 269

The resources that are part of the request are listed on screen. The following information can be displayed for each resource:

- fill position (if for a resource different positions are available, then 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 270 **A**). When a quantity is specified the cell turns from yellow to light blue.

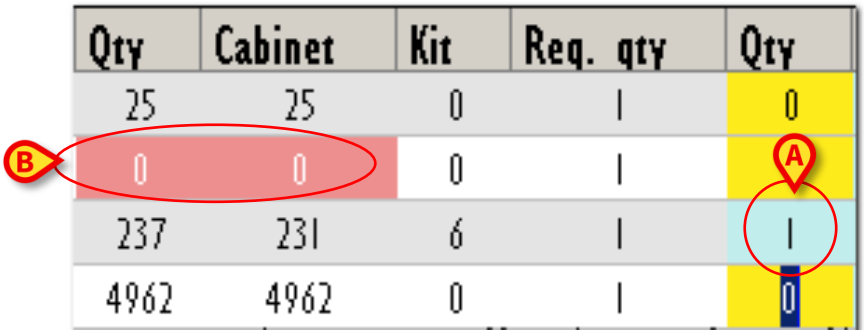


Fig 270

If a resource is unavailable the "Q.ty" and "Cabinet" cells are highlighted red (Fig 270 **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.

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 271).

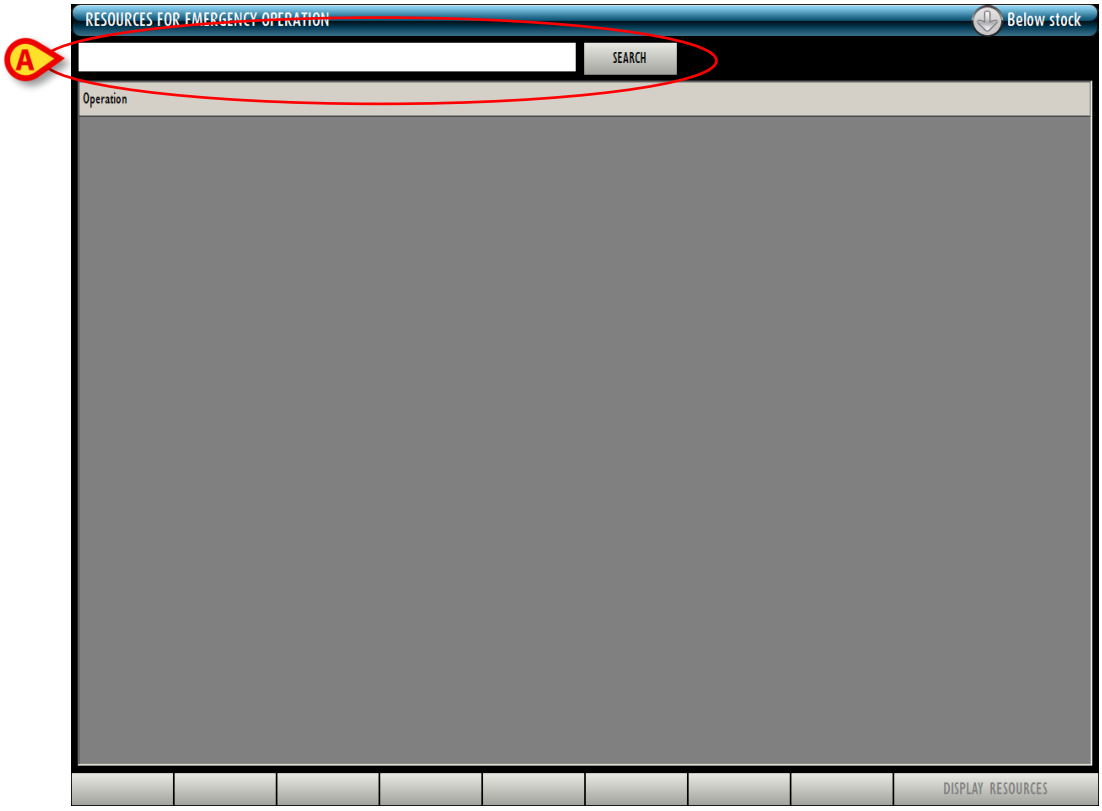


Fig 271 - “Emergencies” module

20.1. How to display the resources list for an operation

The field placed on top, indicated in Fig 271 **A**, allows to search for the operation for which the resources list is required. To search for the operation

- Type the operation name (or part of it) in the field indicated in Fig 272 **A**.

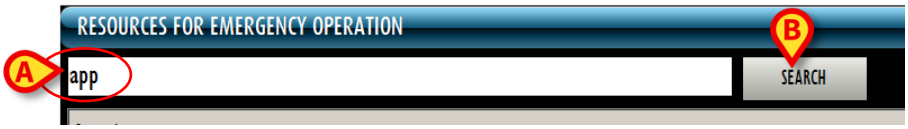


Fig 272

- Click the **Search** button (Fig 272 **B**).

The list of operations whose name includes the specified string is displayed (Fig 273 **A**).

Fig 273

- Click the name of the relevant operation.

The name is highlighted (Fig 273 **B**).

- Click the **Display Resources** button on the command bar (Fig 273 **C**).

The document listing the resources is created.A print preview is displayed (Fig 274).

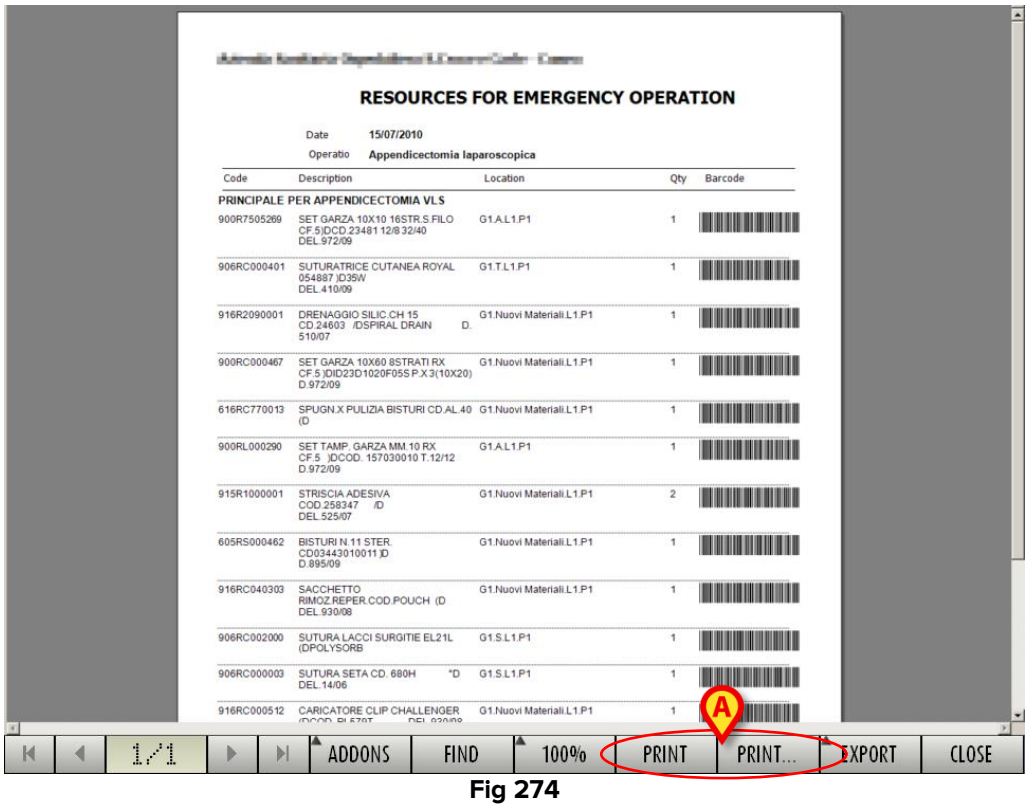


Fig 274

- Click the **Print** button on the command bar (Fig 274 **A**) to print the document.

For each resource the following information can be displayed:

- the code;
- the description;
- the location;
- the required quantity;
- the barcode.

This document can be used to pick the resources from their actual location.

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 “Expiration” field.

To select the module

- Click the corresponding icon .

The following screen opens:

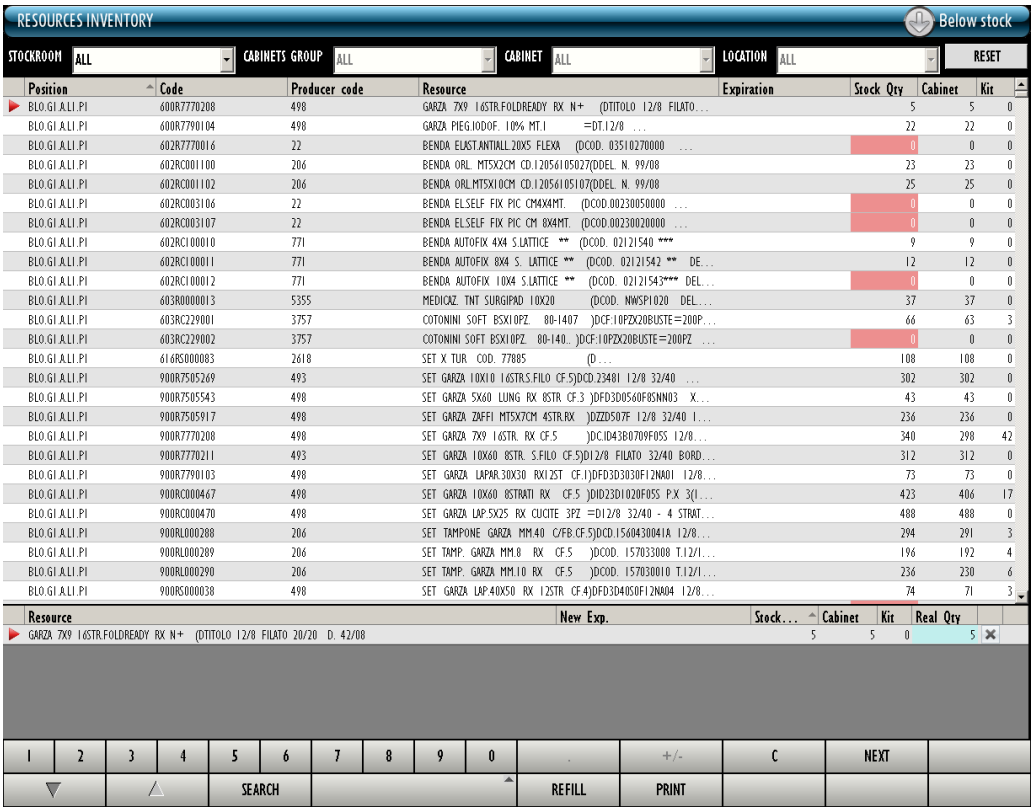


Fig 275 - Inventory

21.1. Inventory: screen structure

The “Inventory” screen is structured according to the general description provided in section 1.4. This section describes the specific features of this screen.

21.1.1. Filters

Fig 276 - Filters on the “Inventory” screen

The filters available on the “Inventory” screen (Fig 276) are:

- “Stockroom” - Display the resources of a specific stockroom.
- “Cabinet group” - Display the resources of a specific cabinet group.
- “Cabinet” - Display the resources of a specific cabinet.
- “Location” - Display the resources of a specific location.

21.1.2. Data area

The data area of the “Inventory” screen is formed of two parts (Fig 277).

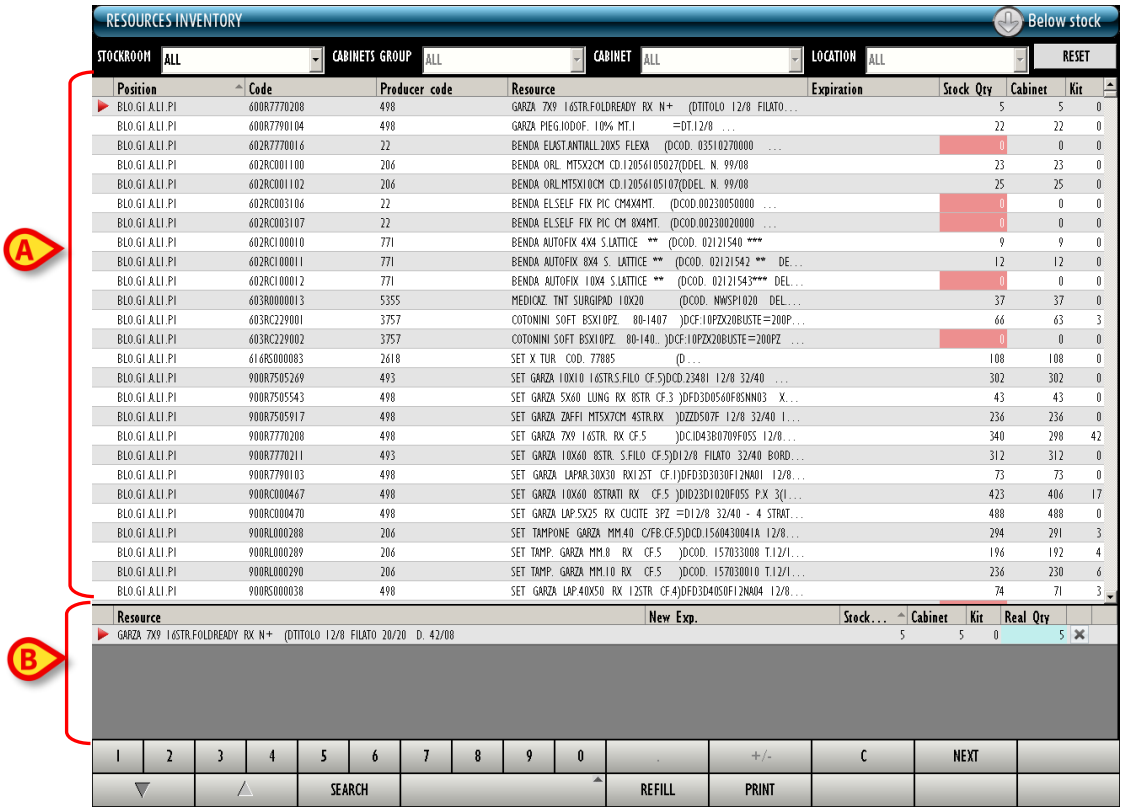


Fig 277 - Inventory

The upper part of the screen lists all the resources that are in the inventory (Fig 277 **A**). Each row corresponds to a resource type. For each resource the following information can be provided:

- the position (read only);
- the resource code (read only);
- the manufacturer code (read only);

- the resource name (read only);
- the expiration date (read only);
- the quantity of resources in stock (read only);
- the quantity of resource located in the cabinets (read only);
- the quantity of resource located in the kits (read only).

The lower part of the screen (Fig 277 **B**) provides the actual quantities and locations for the type of resource selected in the upper part. Each row corresponds to a single resource.
For each row the following information can be available:

- the resource name and description (read only);
- the new expiration date (if managed);
- the total recorded quantity in stock (read only);
- the recorded quantity of resource located in the cabinets (read only);
- the recorded quantity of resource located in the kits (read only).
- the actual quantity in stock.

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 a minimum configured quantity, thenthe corresponding cell is highlighted red; when the quantity in stock for a resource is less than a configured ideal quantity, then the corresponding cell is highlighted yellow.

If there are 0 items in stock for a resource, then the selection of the type-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 (according to the configuration of the resource).

The icon on the right cancels the corresponding row. The cancelled row is displayed in strike-through characters, as in Fig 278.

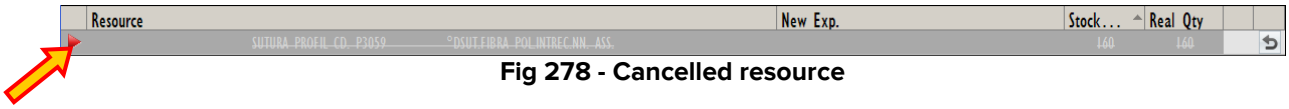


Fig 278 - Cancelled resource

The corresponding resources disappears when the screen is updated.

The icon on the right is an “Undo” button.

The rows highlighted green correspond to resources that are not in use anymore, for which there are still available quantities in stock (Fig 279).

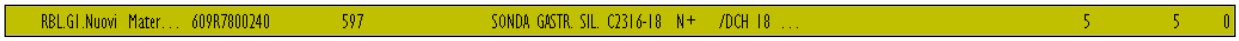


Fig 279

21.1.3. The “Inventory” screen command bar

The command bar of the “Inventory” screen is shown in Fig 280.

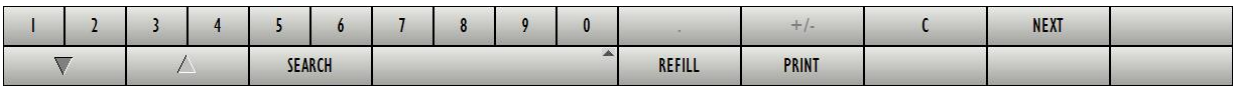


Fig 280 - Command bar

Either use the numeric buttons on the upper row (Fig 281) or the workstation keyboard to manage numeric data.

Fig 281 - Numeric buttons

The “ **.** ” button is a decimal divider. The button is active only if decimal specification is relevant.
The “**+/-**” button changes negative/positive values. 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 to scroll up and down the screen contents.
Use the **Search** button to access the general search screen (described in section 22).
Use the **Refill** button to access the refill functionalities for the selected resource. See section 21.3 for the procedure.
Use the **Print** button to print the inventory.
Use the **Close** button to close the screen.

When editing, the **Update** and **Cancel** buttons are displayed on the command bar.
Click **Update** to save.
Click **Cancel** to discard the changes.

21.2. Editing the inventory values

The “Inventory” module allows to manage the resources values. It is possible to change the quantities in stock and the expiartion dates. It is also possible to delete a resource.
The nature and number of editable values depend on the configuration of the specific resource. Editable values are indicated by the light-blue colour highlighting the corresponding cell. In Fig 282, for instance, only the actual quantity is editable.

Resource		New Exp.	Stock...	Real Qty
SUTURA PROFIL CD. P3059	°DSUT.FIBRA POL.INTREC.NN. ASS.		160	160

Fig 282

21.2.1. How to change the quantities in stock

To change the quantity in stock of a resource,

- Click, in the upper area, the row corresponding to the relevant resource.

The row is selected; the icon is displayed on the left (Fig 283 **A**).

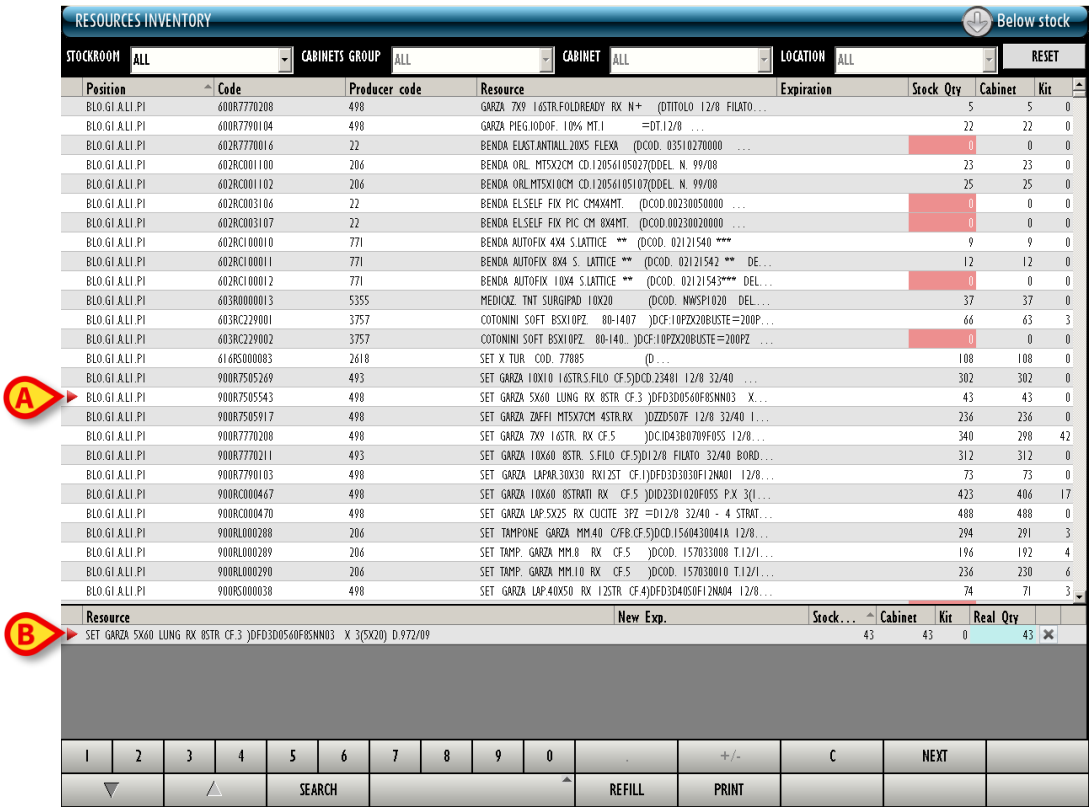


Fig 283

In the lower area the details of the selected resource are displayed (Fig 283 **B**).

- Click, in the lower area, 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.

- Specify the new quantity.
- Click the **Update** button on the command bar.

The quantities in stock are updated. The icon on the right is an “Undo” button.

21.2.2. Deleting an item from the inventory

To delete an 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 is displayed on the left (Fig 284 **A**).

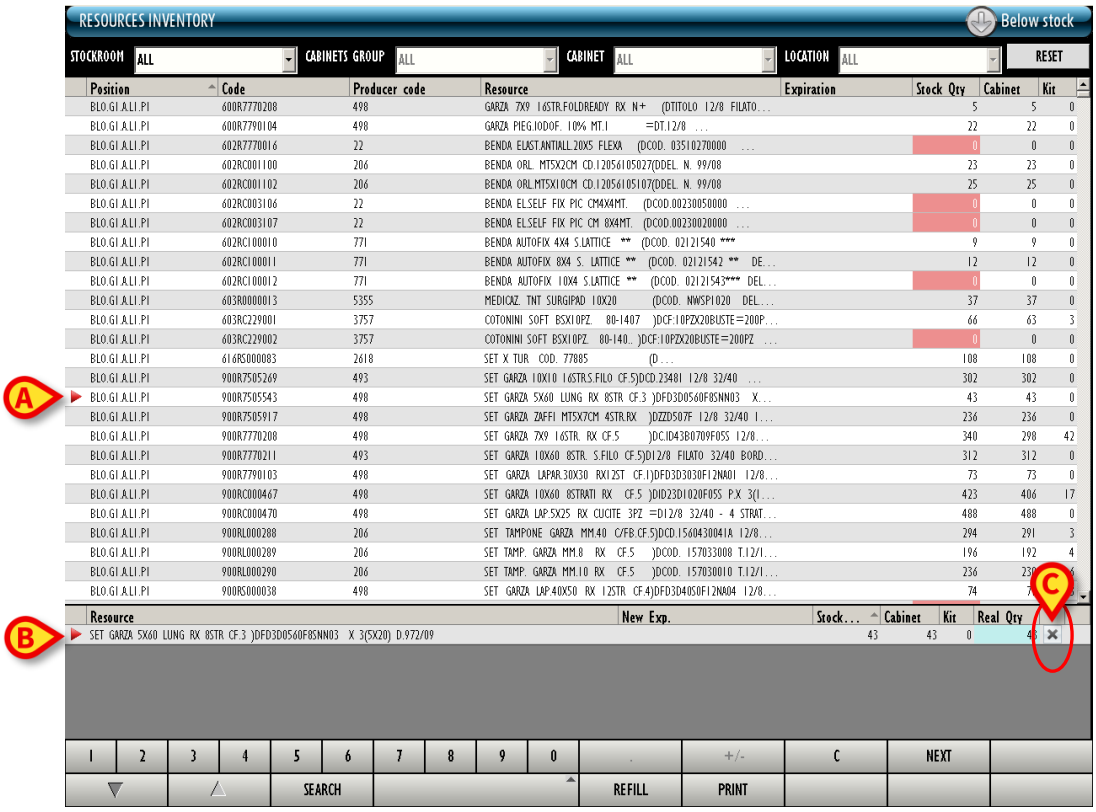


Fig 284

The details of the selected resource are displayed in the lower area of the screen (Fig 284 **B**). Here, on the right of the row corresponding to the resource that must be deleted,

- Click the button (Fig 284 **C**).

The row is displayed as striked-through (Fig 285).

Fig 285

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

The row disappears from the lower area of the screen. The inventory values are consequently updated. If all the items of a certain resource are deleted, then also the row corresponding to the resource type disappears from the upper area of the screen.

The icon is an “Undo” button.

21.3. Refill resource procedure

It is possible to access the “Refill resource quantity” functionalities directly from the inventory screen. To do that

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

The resource is selected; the ▶ icon is displayed on the left (Fig 286 **A**).

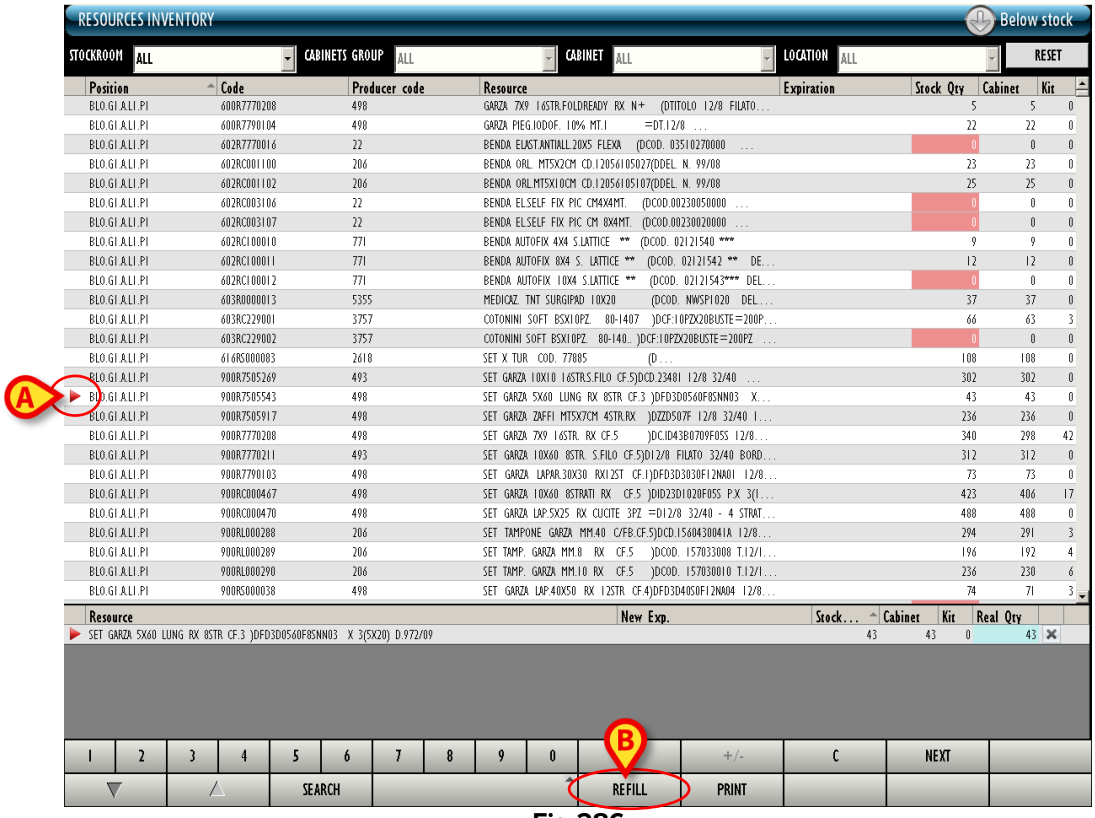


Fig 286

- Click the **Refill** button on the command bar (Fig 286 **B**).

The “Resources refill” screen is displayed (Fig 287). The selected resource is there displayed (Fig 287 **A**).

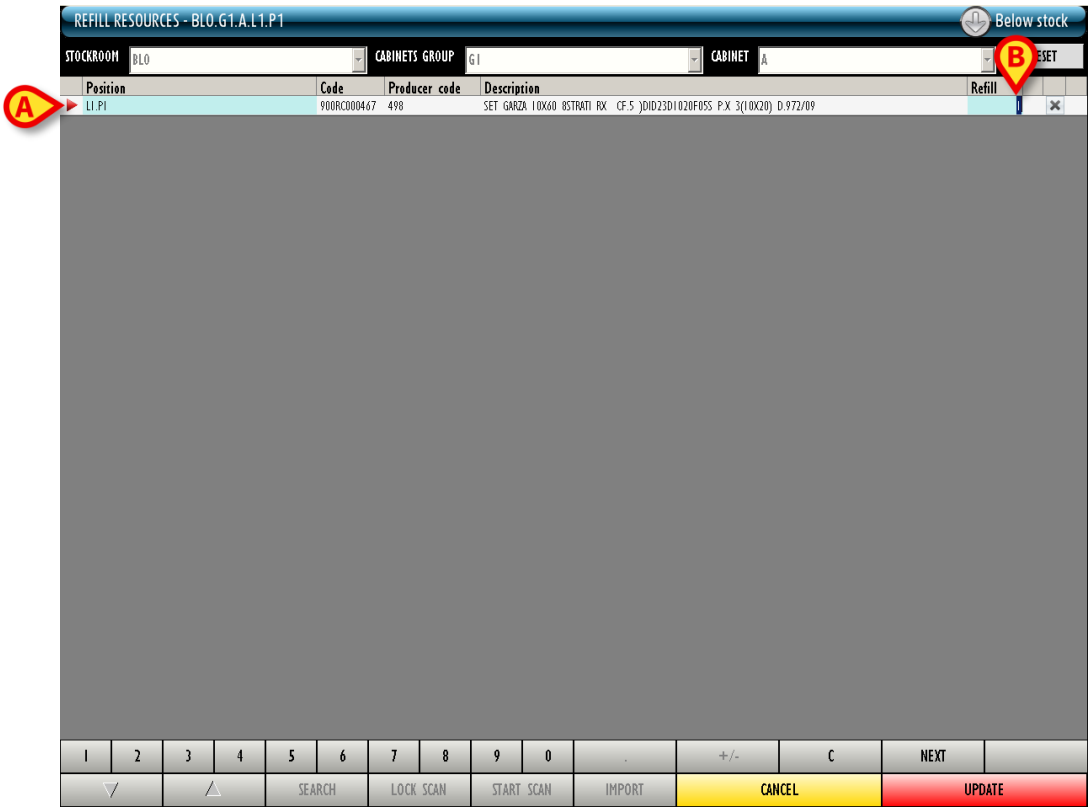


Fig 287

- Specify, if required, the resource values (lot, serial number, etc...).
- Specify the “refill” quantity in the “Refill” field (Fig 287 **B**)
- Click the **Update** button on the command bar.

The “Inventory” screen is displayed again (Fig 286). The resource values are updated.

21.4. Print inventory

The **Print** button on the command bar prints the inventory. A print preview is displayed.

22. Search functionalities

A specific tool is available in the “Stock Management” system to search for the resources in stock.

*The screen shown in Fig 288 is also displayed when the **Search** button is clicked during some “Stock Management” procedures. The items selected on this screen are then contextually selected for the specific procedure.*

To access this tool

- Click the corresponding icon SM on the lateral bar.

The following screen opens (Fig 288)

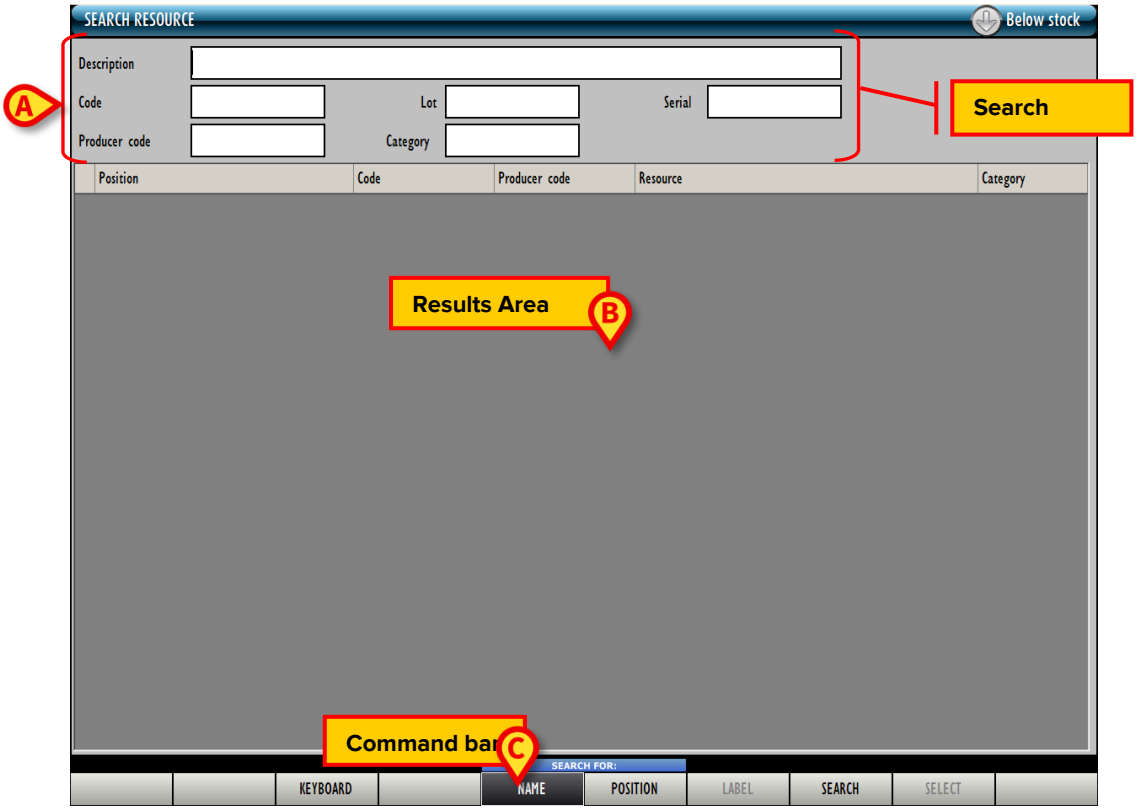


Fig 288 - Search resource

On top of the screen, in the area indicated in Fig 288 **A**, are the search fields.
The area indicated in Fig 288 **B** contains the search results.
The command bar is indicated in Fig 288 **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 289 **A**).

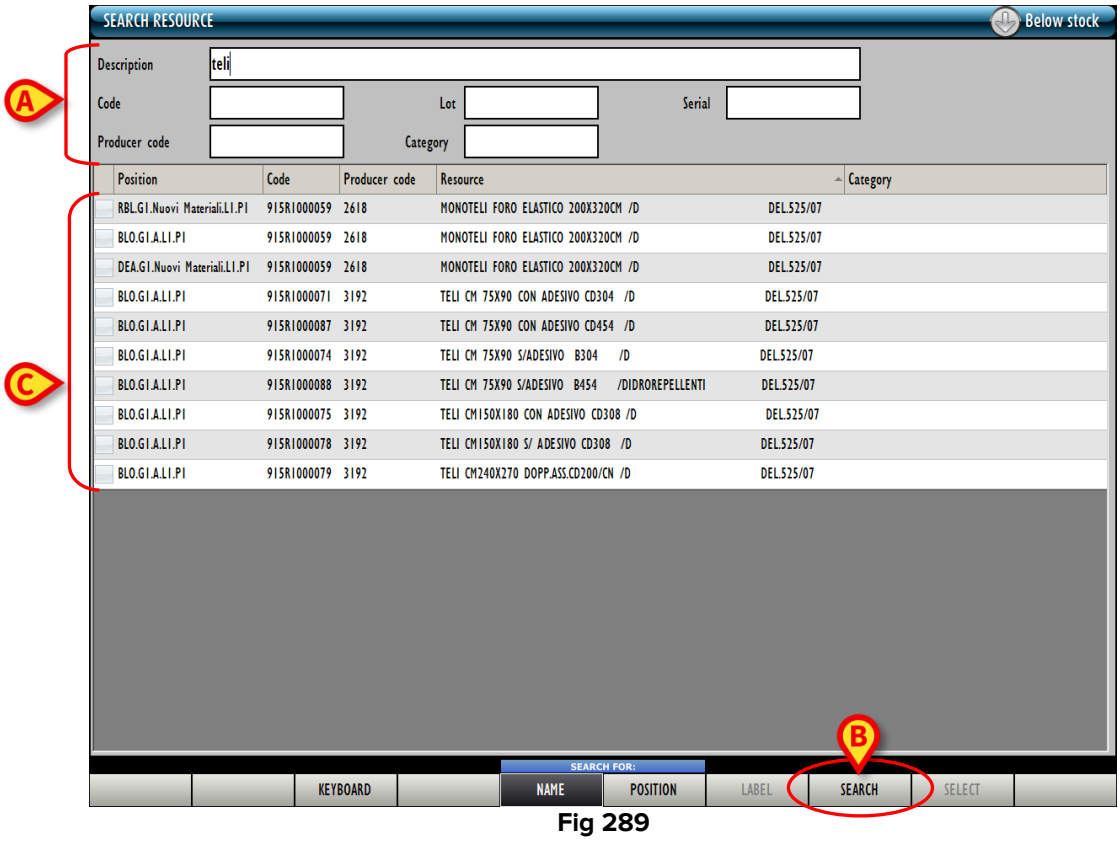


Fig 289

➢ Click the **Search** button on the command bar (Fig 289 **B**).

The list of resources matching the data specified is displayed in the results area (Fig 289 **C**).

22.2. Results

The central part of the screen, indicated in Fig 288 **B** and shown in Fig 290, 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 290 - 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 can be either enabled or not during configuration. In Fig 290 **A** three resources are selected.

22.3. The command bar

The command bar is shown in Fig 291.

Fig 291 - Command bar

The **Keyboard** button displays a virtual keyboard that can be used for data entry on touch workstations.
The buttons **Name** and **Position** select the search modality.
See section 22.1.1. for the **Name** search. See section 22.4 for the **Position** search.
The **Label** button prints a sticker label containing the barcode of a selected resource. See section 22.3.1.

Use the **Search** button to perform the search (see section 22.1.1).

Use the **Select** button to select one of the items displayed and insert it in the current procedure. The **Select** button is not active when the search module is selected via the icon on the lateral bar (this is the case described in this section 22). The **Select** button is active when the search screen is accessed directly from another module, as part of a specific procedure.

To select an item:

- click the row corresponding to the relevant item.

The row is highlighted (Fig 290 **A**).

- Click the **Select** button.

The selected item is inserted in the current procedure.

22.3.1. Print label for the selected resource

To print the barcode sticker label of a selected resource:

- Search for the resource using the procedure described in section 22.1.1.
- Click the row corresponding to the relevant resource.

The row is highlighted.

- Click the **Label** button.

The following screen opens, enabling to specify the number of labels to be printed (Fig 292).

Fig 292

- Specify the number of labels in the field indicated in Fig 292 **A**.
- Click the **Continue** button (Fig 292 **B**).

The specified labels are printed.

22.4. Search by position

When the **Position** button on the command bar is selected, then a screen enabling to search by position opens (Fig 293).

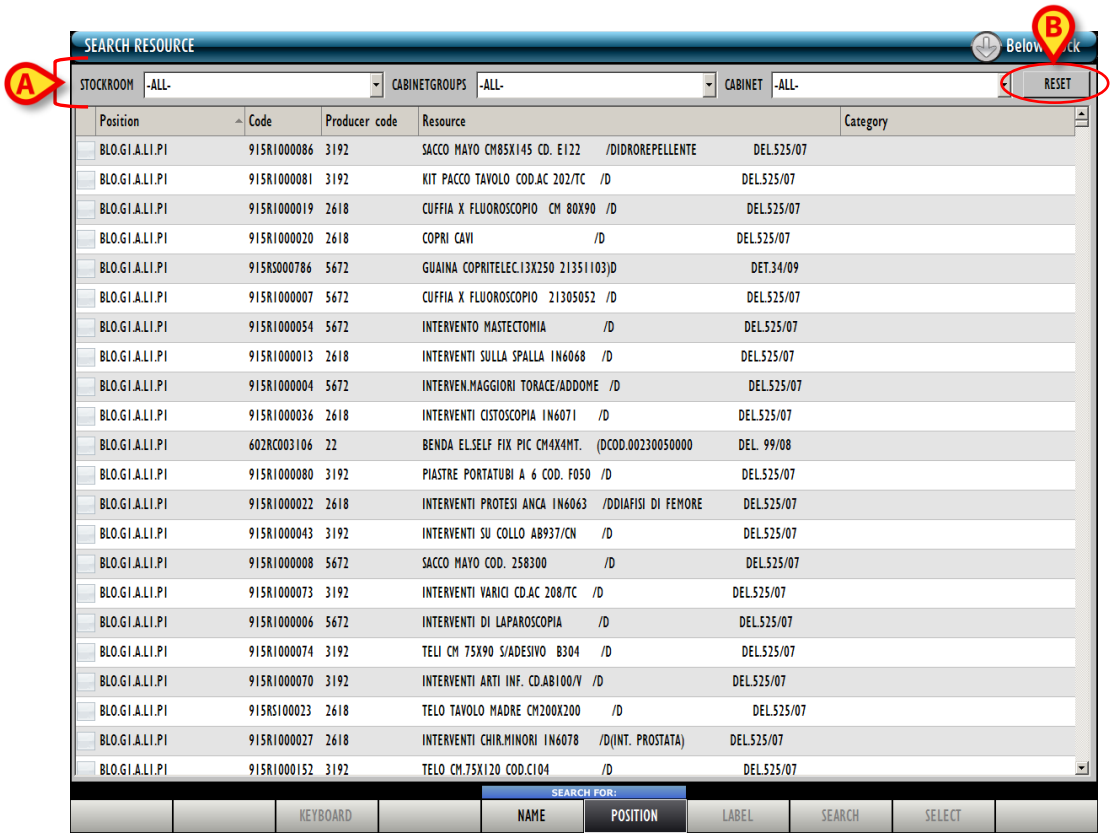


Fig 293 - Search by position

The screen displays the complete resources list. Three filters are on top (Fig 293 **A**), making it possible to reduce the number of items displayed. The available filters are:

- "Stockroom" - Display the resources of a specific stockroom.
- "Cabinet group" - Display the resources of a specific cabinet group.
- "Cabinet" - Display 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.

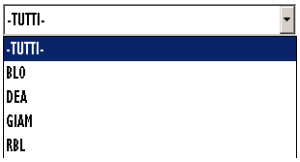


Fig 294

➢ Click the wanted option.

The name of the chosen filter is dislayed in the field. The list of resources on screen changes accordingly.

The **Reset** button (Fig 293 **B**) resets all filters.