PrecisionWeb

Point of Care Data Management System

User's Manual

QC Manager 3.0

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ART12275 Rev. B 04/09

Abbott

1. About the PrecisionWeb Point of Care Data Management System

Thank you for selecting the PrecisionWeb Point of Care Data Management System.

Intended Use

The PrecisionWeb Data Management System is a browser-based software application that allows you to manage your Point of Care (POC) program from any computer throughout your healthcare facility. Note that the PrecisionWeb Data Management system was previously called QC Manager 3.0 and is referred to as QCM3 throughout this manual.

The PrecisionWeb data management system includes configurable features to automatically or manually forward patient and Quality Control (QC) results to the Laboratory or Hospital Information System (LIS or HIS).

In addition, a bi-directional interface allows data to be uploaded from and downloaded to any supported instrument. The bi-directional interface helps you to manage data and comply with laboratory standards and policies.

This product is not for diagnostic use; all patient diagnostics should be based on results reported by the point of care instrument.

User Interface Screens

- The User Interface (UI) screens are designed to support the management of test results, operators, instruments and lots (reagent lots, control lots, linearity lots and proficiency lots).
- The UI screens allow you to set up the facilities within your organization and name the associated departments and locations.

Multiple Users

- Multiple users can access the system at one time.
- The system allows for customized levels of access. Each level of access will provide the user with visibility to the UI screens and functions specific to the user's needs. This is referred to as custom scope and permissions.
- Authorized users can access the system from any networked computer using Windows Internet Explorer (version 5.5 or later).

Reports

- The system allows you to select 23 different default report types that can be used to create individual customized reports for your facility. Report settings can also be saved for easy retrieval at a later time.

- Each default report has specific filters available that allow you to include certain types of data in your report, such as comment codes, instrument errors, and test result outlier data.

- When a customized report is viewed later, the current data from the database will appear in the report. This eliminates the need to re-create reports that are required on a weekly or monthly basis.

- The system also gives you the ability to e-mail links to reports saved as PDF files.

We are confident that the PrecisionWeb (QCM3) Point of Care Data Management System will help you manage your POC program more effectively and efficiently.

Please read this user manual for additional information and step-by-step instructions and illustrations on how to use the system.

2. Screen Overview

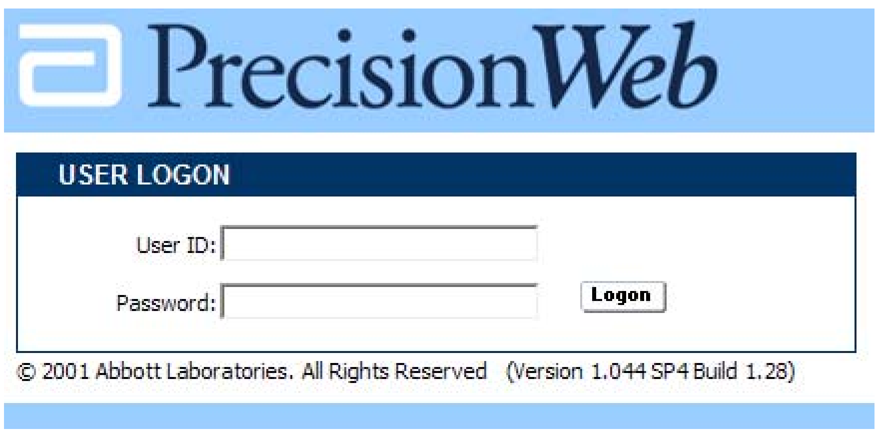
User Logon Screen

The Administrator or Point of Care Coordinator (POCC) is responsible for providing each user with a User ID and Password, and assign scope and permissions to access the system.

User scope and permissions affect the menu options available, the viewable Tree locations and the actions one can perform when accessing the system.

The **User Logon** screen is the initial screen viewed by all users.

To log on to the system:



1. Enter the **User ID** and **Password** you have been assigned. (See Chapter 9, Administrative, Section My Profile Screen for information on changing your password.)

2. Click the **Logon** button, or press **Enter** on your keyboard.

3. If a valid User ID and Password are entered, the system displays the QCM3 main screen.

Warning Messages

If the User ID or Password is not entered before clicking the Logon button, one of the following warning messages is displayed:

- Click the **OK** button to clear the message and enter the missing field.

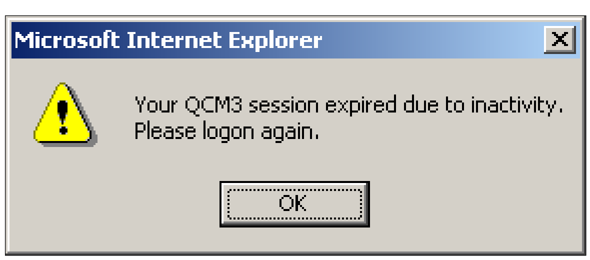
If the User ID or Password entered is not valid the following warning message is displayed:

- Click the **OK** button to clear the message and enter a valid User ID or Password

If a QCM3 "database restore" is in progress, the following warning message is displayed:

- Click the **OK** button to clear the message and log on again later.

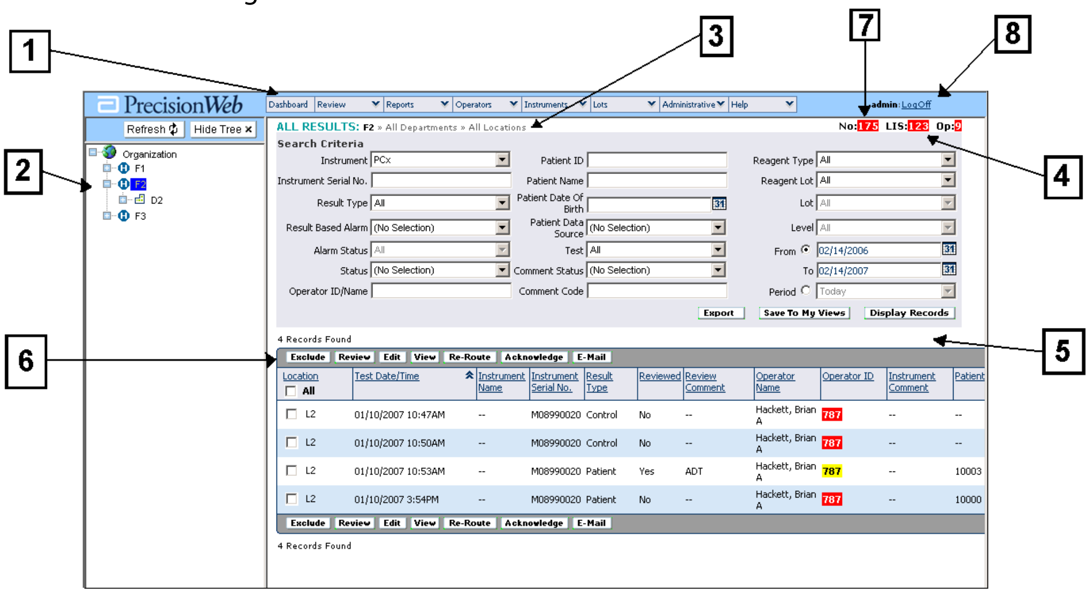
The QCM3 session will expire if there is no activity within the application for 20 minutes. (Except for the Summary screen; see Chapter 4, Section Summary Screen). After 20 minutes, the following message appears:



- Click the **OK** button and log on again.

Main Screen Details

The main screen has eight main features:



1. The **Menu Bar** — Displays a list of the available menu options across the top of the screen. When you move your cursor over the menu items, dropdown submenus appear.

2. The **Location Tree** — Displays an expandable and collapsible list of the available locations in the organization. The Tree can remain visible or be hidden to allow more information to be displayed on the Details Working area. The Tree is located on the left side of the screen.

3. The **Breadcrumb Trail** — Displays the current menu selection, followed by the current Tree selection (organization, facility, department or location).

4. The **Total Alarm Count** — Displays the total count of unacknowledged alarms for the Location Tree scope assigned to the user. The totals include all locations accessible to the user regardless of the current Tree selection.

5. The **Details Working Area** — Displays screens that will vary based on the selected menu option. The menu and location selected in the Tree will determine the information displayed. Search Criteria may be present to help locate or filter information.

6. Action Buttons — These buttons vary according to the selected screen. They take the labeled action (Exclude, Review, Edit, Delete, E-Mail, etc…) to items selected in the table.

7. Current Logged In User — Displays the name of the current user.

8. Log Off — Logs off the system

The Menu Bar

The horizontal **Menu Bar** displays the options available to you depending on the scope and permission level assigned to you by the Administrator or POCC.

The following main menu items are displayed:

Dashboard	Clicking this menu item will display the Dashboard screen.
Review	Moving the cursor over this menu item will display the Review menu.
Reports	Moving the cursor over this menu item will display the Reports menu.
Operators	Moving the cursor over this menu item will display the Operators menu.
Instruments	Moving the cursor over this menu item will display the Instruments menu.
Lots	Moving the cursor over this menu item will display the Lots menu.
Administrative	Moving the cursor over this menu item will display the Administrative menu.
Help	Moving the cursor over this menu item will display a list of available User Manuals. The table of contents will provide links to chapters and sections of the selected User Manual. If the PDF viewer is not installed, a message will ask you to install the PDF viewer.

Selecting a Menu Option

To **view** menu options:

1. Place the mouse cursor over a menu item until the cursor changes from an arrow to a hand and a list of associated options appears.

2. If an option has additional choices, an arrow will appear to the right of the initial option.

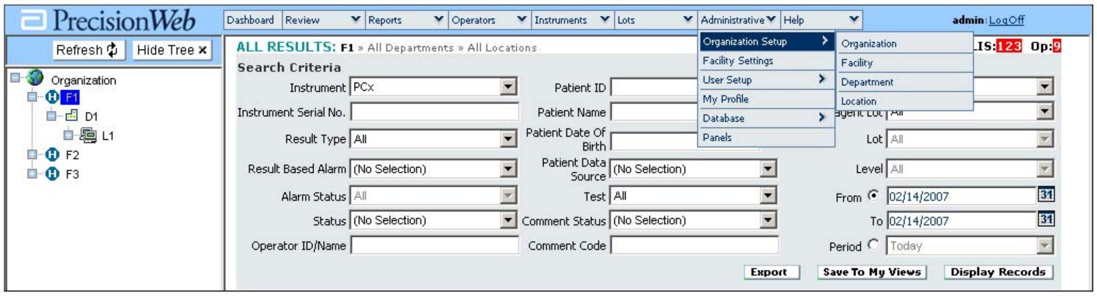
3. Move the mouse cursor over the menu option to view the list of associated options in the submenu displayed to the right of the initial list of options.

To **select** a menu option:

1. Place the mouse cursor over a menu item to highlight the associated menu options.

2. Move the cursor (now a hand) over the list of options that appear below the menu item until the option you would like to select is highlighted.

3. Click the left mouse button to select that option.



To **select** a submenu option from the **Administrative**>>Organization Setup, Administrative>>User Setup, Administrative>>Database or **Lots>>Reagent** options (these options have an additional submenu):

1. Move the mouse cursor over **Administrative** or **Lots** to display the menu options.

2. Move the mouse cursor over the **Reagent** option under **Lots** or the **Organization Setup**, **User Setup** or **Database** option under **Administrative** until the submenu appears.

3. Click on the desired menu option.

The Location Tree

The Location Tree is made up of one or more Facilities and associated Departments and Locations. Each level of the Tree is linked to the level above. This is known as the Parent-Child relationship. The Organization level is a Parent Level. The Location level is a child of the Department level. Facilities and Departments can be either a Parent or Child.

Organization:	Parent to all Facilities within the Organization
Facility:	Parent to all Departments within the Facility, Child to the Organization
Department:	Parent to all Locations within the Department, Child to the associated Facility
Location:	Child to the associated Department

The **Location Tree** displays the locations available to you depending on the scope and permission level assigned to you by the Administrator or POCC.

- If you have not been assigned access to a Facility, Department or Location the corresponding location is not displayed in the Tree area.

- The Tree displays an expandable and collapsible diagram of the location structure of the organization.

- Locations are created by the Administrator or POCC and appear in the Tree in the following order:

 **Organization Name** The named Organization

	Facility Name	Associated hospitals and satellite clinics (Facilities) in the Organization
	Department Name	Associated Departments in a Facility
	Location Name	Associated Locations in a Department
	Instrument Type	Instruments that have been added to a Location
	Instruments	Associated Instruments under an Instrument Icon in a Location

> ***Note:*** *There are no limits on the number of Facilities, Departments, Locations or Instruments that can be listed in the Tree.*

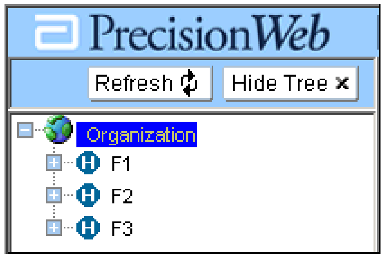
Selecting from the Tree Area

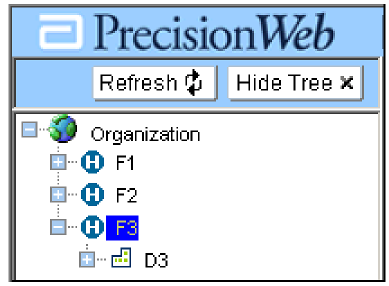
To **select** a location in the Tree:

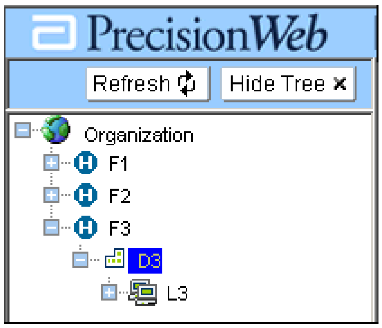
1. Click the left mouse button on Organization, Facility, Department or Location.
2. Your selection is highlighted in blue in the Tree and displayed in the Breadcrumb Trail.

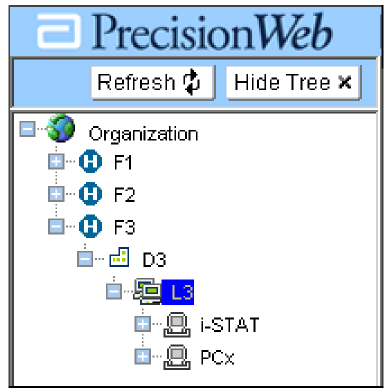
For example, the screens below show:

- The highlighted Organization with the associated Facilities
- The highlighted Facility with the associated Departments
- The highlighted Department with the associated Locations
- The highlighted Location with the associated Instrument Icons and Instruments









To **expand** and **collapse** the locations in the Tree:

- Click the left mouse button on the "+" symbol to display the contents of that location.
- Locations with a "+" symbol are collapsed.
- Click the left mouse button on the "-" symbol to collapse the contents of that location.
- Locations with a "-" symbol are expanded.

To **refresh** the Tree:

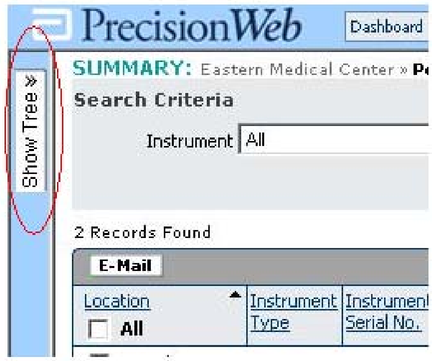
1. Click the left mouse button on the **Refresh** button to refresh the Tree with the current information from the database.
2. When should you refresh the Tree? When you want to see new information, such as newly added instruments or new locations added by others.

To **hide** the Tree:

1. Click on the **Hide Tree** button in the top right corner of the Tree.
2. Clicking on the **Hide Tree** button will hide the Tree and replace it with a thin, blue vertical bar.
   - A **Show Tree** button will be displayed at the top of the blue bar.

- When the Tree is hidden, the display area to the right (Details Working Area) is enlarged and encompasses the area where the Tree had been displayed.

- Press the **Show Tree** button to display the Tree again.



To **pin** the Tree:

1. When the Tree is hidden, move the cursor into the small, minimized sidebar on the left of the screen (do not click the **Show Tree** button).

- The Tree will re-emerge with the **Pin Tree** option showing rather than the Hide Tree option.

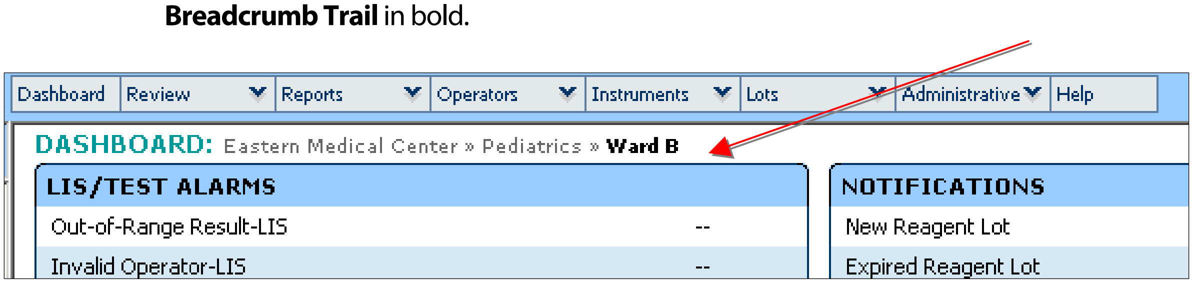
- Pinning the Tree restores a stable view of the Tree.

- Clicking on the **Pin Tree** button reverts the button back to **Hide Tree**.

The Breadcrumb Trail

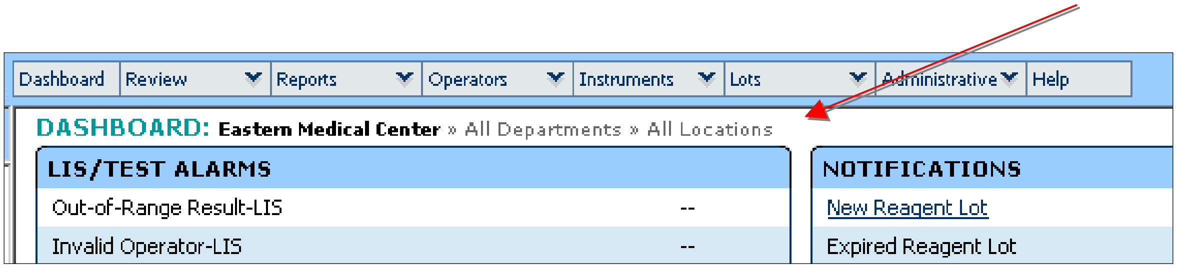
A locator line is displayed below the horizontal menu and above the Details Working Area that shows the selected menu option in teal-colored capital letters, followed by the Facility, Department and/or Location you have chosen from the Location Tree.

- The current Tree selection (Facility, Department or Location) is shown at the end of the **Breadcrumb Trail** in bold.



- If the current Tree selection is a Facility, the Breadcrumb Trail will indicate that you are looking at data from "All Departments>>All Locations."

- Similarly, if the current Tree Selection is a Facility and a Department, but not a Location, the Breadcrumb Trail will note that you are looking at data from "All Locations."



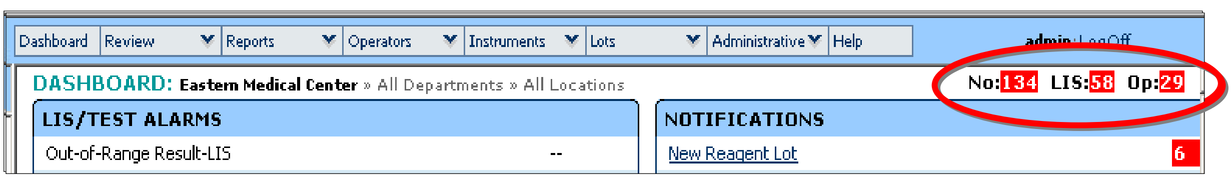
The Total Alarm Count

An **Alarm Count** status bar is displayed in the upper right-hand corner to the right of the Breadcrumb Trail and below the User ID identification.

- The **Alarm Count** is displayed on all screens except for the Logon screen.

The **Alarm Count** displays the total count of unacknowledged alarms for each of the following categories:

- Notifications (No)
- LIS/Test Alarms (LIS)
- Operator Alarms (Op)



Each **Alarm Count** will display a maximum of five digits (max: 99,999) and is calculated as the sum of all unacknowledged alarms, including all instruments for each alarm category.

If there are any unacknowledged alarms, the number is displayed in white text on red background. If there are no unacknowledged alarms, the number "0" is displayed with black text on white background.

If the number of alarms exceeds 99,999, this field will still display "99,999."

- The **Alarm Counts** that are displayed include all alarms for all the locations to which the logged-on user has access.

Notes:

- *The counts are independent of the location selected in the **Location Tree.***
- *The **Total Alarm Count** bar will be displayed only if you checked **Show Total Alarm Counts** under **Alarm Preferences** in the **My Profile** screen under the **Administrative** option on the horizontal menu bar.*
- *The alarm counts shown reflect your selection of alarm types under **Show Alarms of Type** in the **My Profile** screen.*
- *An explanation of alarm types can be found in Chapter 4, Review, Section Alarms Screen.*

The Details Working Area

The Details Working Area displays screens that will vary based the selected menu option. The menu and location selected in the Tree will determine the information displayed. Search Criteria may be present to help locate or filter information.

The screen you see immediately after you log on is determined by the option chosen from the dropdown list in the **Startup Screen** field on the **My Profile** screen, under the **Administrative** horizontal menu option.

To choose a **Startup** screen:

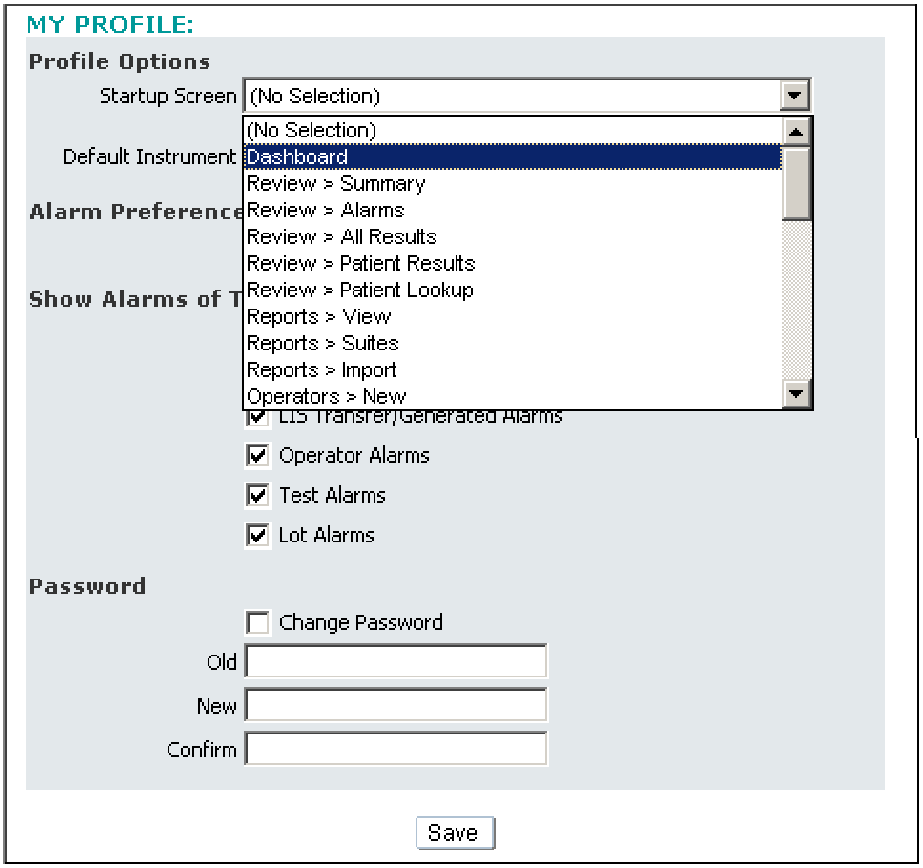
1. Move the mouse cursor over **Administrative** in the Menu Bar to display the menu options.

2. Move the mouse cursor down the options to **My Profile**.

3. Click on the **My Profile** option.

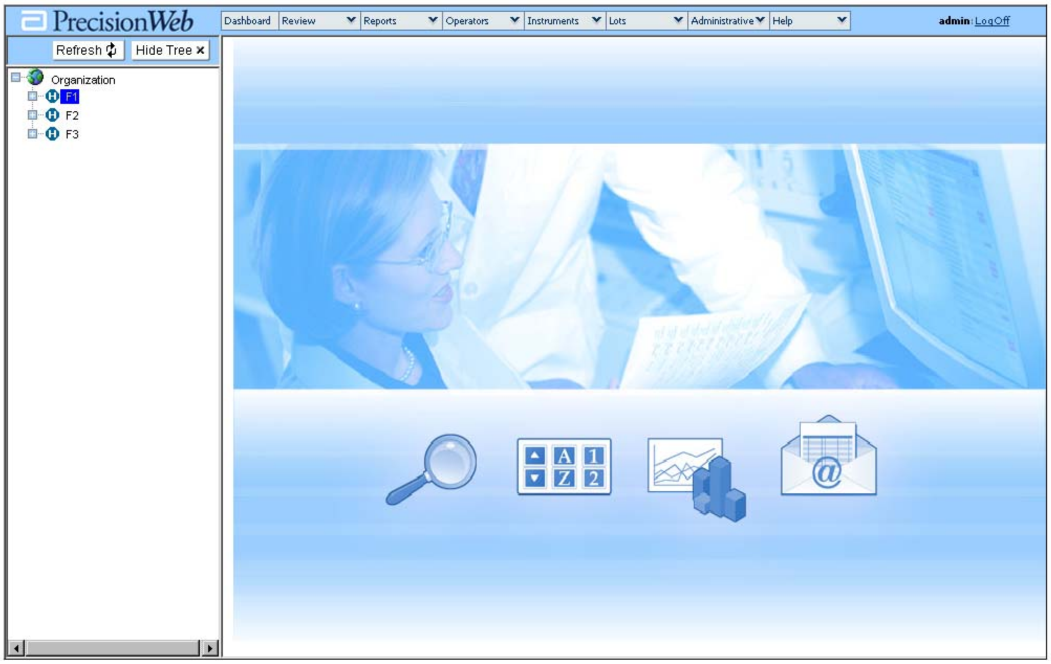
4. In the **My Profile** screen, under **Profile Options**, click on the arrow to the right of the **Startup Screen** field to choose from the dropdown list of screen choices.

5. Click the **Save** button at the bottom of the screen.



> ***Note:*** *The remaining choices on the My Profile screen will be addressed in Chapter 9, Administrative, Section My Profile Screen.*

If a user has not specified a startup screen, the **Details Working Area** displays the startup graphic.



The screen displayed in the **Details Working Area** changes depending on which menu option you have chosen from the dropdown lists on the horizontal **Menu Bar**.

When any menu option is selected from the horizontal menu, the **Details Working Area** displays:

- **Search Criteria** specific to the selected menu option (on the upper half of the screen in blue-gray background), and/or
- A system default table with fields and action buttons, which vary depending on the selected menu option and the user's assigned Function Permissions (on the bottom half of the screen).

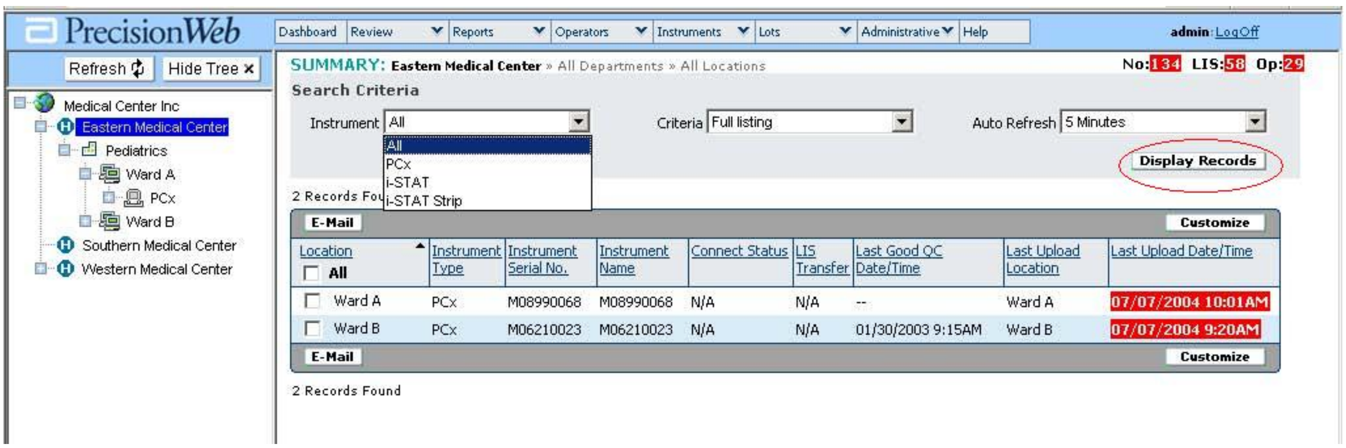
Notes

- *The **Auto Refresh** option on the **Summary** screen allows you to select how often the information in the Table is automatically updated.*
- *When **Auto Refresh** is selected, the Auto Logout option is overridden.*
- *See Chapter 4, Review: Section Summary Screen for more information on Auto Refresh.*

Filtering Results

To filter the results displayed on a screen (use the **Review>>Summary** screen as an example):

1. Move your cursor to the **Search Criteria** area,
2. Select **Instrument** and **Criteria** from the dropdown lists,
3. Select a **Location** (Facility, Department or Location) from the Tree,
4. Click the **Display Records** button.



The information in the Table is updated based on the search criteria and location selected.

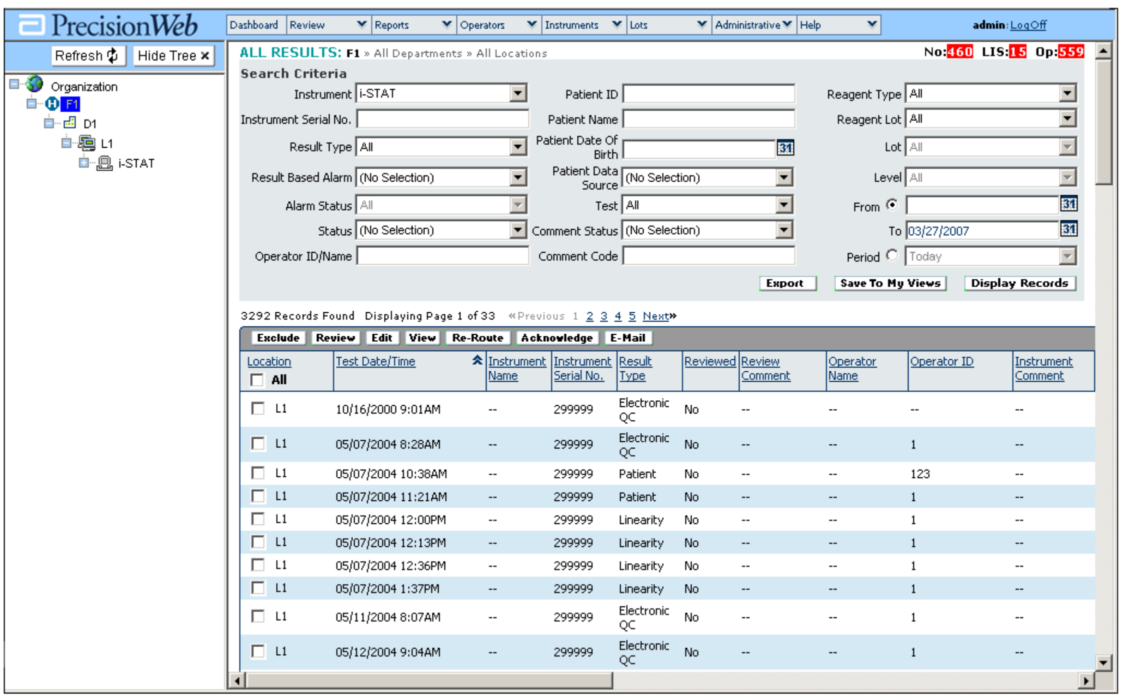
Table Features

The **Action Buttons** appear on a dark gray background along both the top and bottom of the main table in the **Details Working Area.**

Action Buttons listed on the Action Bar allow you to act on the information displayed in the table depending on the permissions assigned to you by the Administrator or POCC.

- For example, the Action Bar on the All Results table displays the **Exclude**, **Review**, **Edit, View, Re-Route, Acknowledge** and **E-Mail** action buttons.

If your User ID does not have permission to perform a certain function (i.e. edit a result record), the corresponding action button is not displayed in the action bar.



Columns

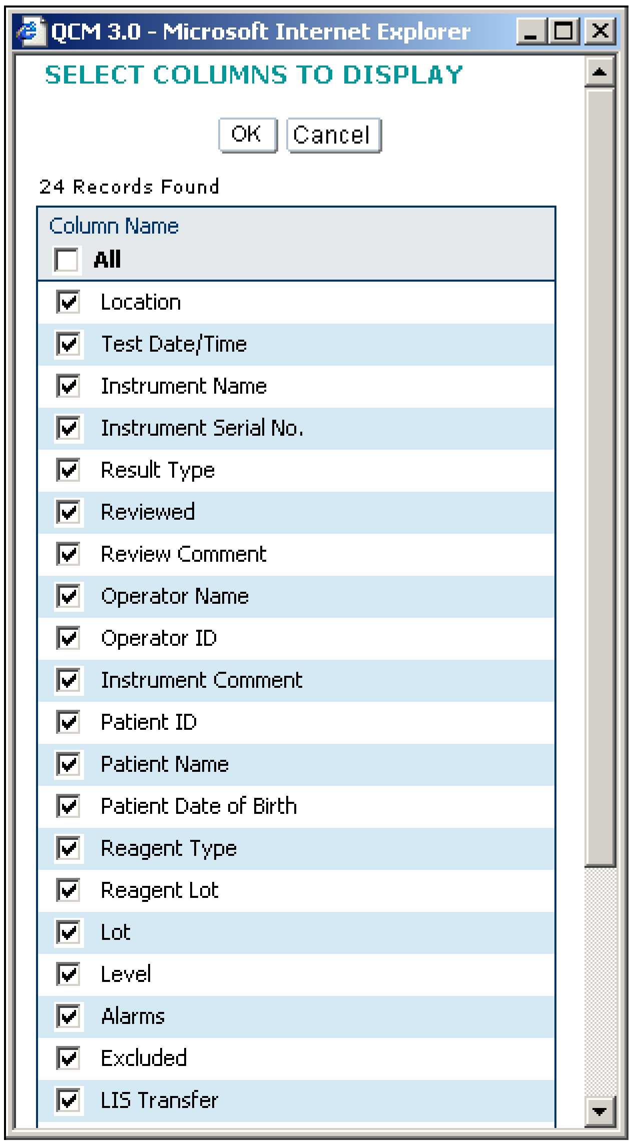
Each screen table has a different set of columns that may be displayed. You can select which columns to display on most screens by using the **Customize** button.

Selecting Columns to Display

1. Click on the **Customize** button (to the right of each **Action Bar** either above or below the table).

    - This will bring up a **Select Columns to Display** pop-up screen with the list of columns available for the table associated with the menu item selected.

    - All columns currently displayed in the table will be checked in the pop-up screen.



2. Choose which columns to display in the table. You can select one or more columns. Columns not checked will not be displayed in the table.

Note: *If all the columns have been selected, the* ***Customize*** *button may be to the far right of the table and not initially visible on the screen. You may need to scroll to the right using the scroll bar on the bottom of your screen to see the* ***Customize*** *button.*

3. Click **OK** to close the pop-up and save the selection. Selected columns are saved as defined for each Menu option per user.

    - If you check **All**, all columns will be displayed on the screen when the pop-up closes. If you check **All** again, it will uncheck all selections and give you the error message: "Please select at least one column to display."

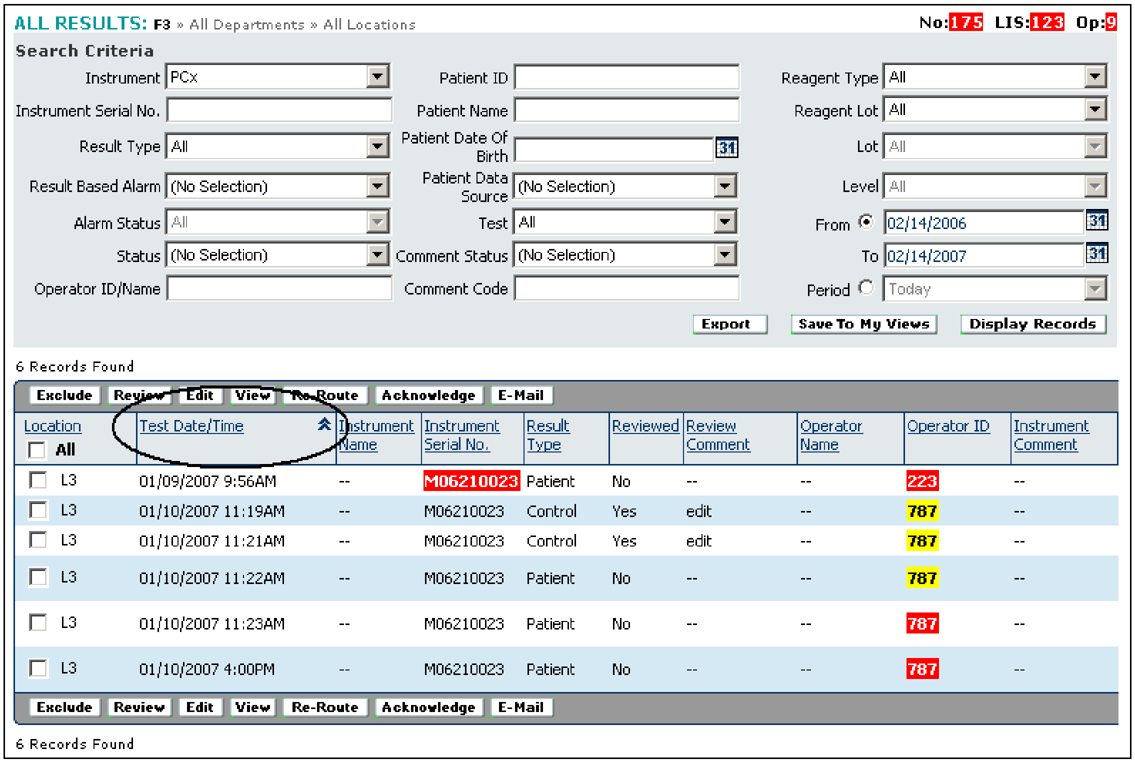
    - Clicking the **Cancel** button will close the pop-up without saving any selections.

Notes:

- *Selections will be saved only for the current user.*
- *This customization is available for each menu item's associated table.*

Sorting Data Columns

- Column headers with underlined hypertext can be sorted.
- Click on the underlined hypertext of a column header to sort the data in the Table in ascending order by the selected column.
- You can sort in descending order by clicking on the column header a second time.
- The sort order is indicated with an up or down arrow to the right of the column name.
- The column header field that displays an arrow is the column the table is currently sorted by.
- Selected column sort is saved as defined for each Menu option per user.



Notes:

- *The system stores the column sort for each table you have selected during a logged-on session.*
- *The next time you log onto the system the tables are displayed with your last preferred setup.*

Field Highlight Display

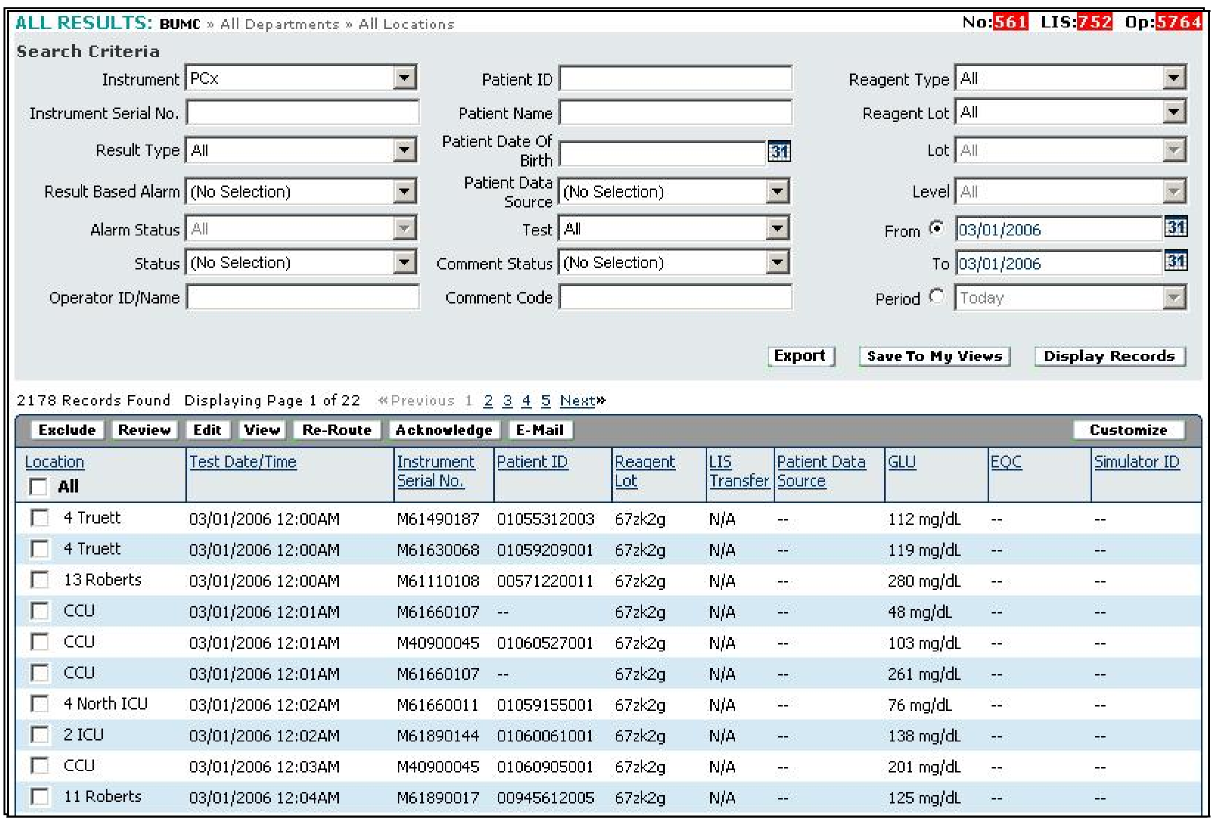
Highlighted text will be displayed with white letters on red background in result data columns when the data is related to an alarm. Highlighted text will be displayed with black letters on yellow background in result data columns when the data is related to a previously acknowledged alarm. Highlighted text may appear on the following screens: **Summary, All Results, Edit Result, View Result** and **Operator Certification.**

Record Count

- A **record count** appears above the Table that displays how many records meet the chosen search criteria.

- A **page counter** appears above the Table if the search criteria selected returns more records than 100 records (up to 100 records will be displayed per page).

- For example, the table below displays the text "2178 Records Found. Displaying Page 1 of 22 << Previous 1 2 3 4 5 Next >>"



ALL RESULTS: BUMC » All Departments » All Locations No:561 LIS:752 Op:5764

Search Criteria

Instrument: PCx
Instrument Serial No.:
Result Type: All
Result Based Alarm: (No Selection)
Alarm Status: All
Status: (No Selection)
Operator ID/Name:
Patient ID:
Patient Name:
Patient Date Of Birth:
Patient Data Source: (No Selection)
Test: All
Comment Status: (No Selection)
Comment Code:
Reagent Type: All
Reagent Lot: All
Lot: All
Level: All
From: 03/01/2006
To: 03/01/2006
Period: Today

Export | Save To My Views | Display Records

2178 Records Found Displaying Page 1 of 22 «Previous 1 2 3 4 5 Next»

Exclude | Review | Edit | View | Re-Route | Acknowledge | E-Mail | Customize

Location (All)	Test Date/Time	Instrument Serial No.	Patient ID	Reagent Lot	LIS Transfer	Patient Data Source	GLU	EQC	Simulator ID
4 Truett	03/01/2006 12:00AM	M61490187	01055312003	67zk2g	N/A	--	112 mg/dL	--	--
4 Truett	03/01/2006 12:00AM	M61630068	01059209001	67zk2g	N/A	--	119 mg/dL	--	--
13 Roberts	03/01/2006 12:00AM	M61110108	00571220011	67zk2g	N/A	--	280 mg/dL	--	--
CCU	03/01/2006 12:01AM	M61660107	--	67zk2g	N/A	--	48 mg/dL	--	--
CCU	03/01/2006 12:01AM	M40900045	01060527001	67zk2g	N/A	--	103 mg/dL	--	--
CCU	03/01/2006 12:01AM	M61660107	--	67zk2g	N/A	--	261 mg/dL	--	--
4 North ICU	03/01/2006 12:02AM	M61660011	01059155001	67zk2g	N/A	--	76 mg/dL	--	--
2 ICU	03/01/2006 12:02AM	M61890144	01060061001	67zk2g	N/A	--	138 mg/dL	--	--
CCU	03/01/2006 12:03AM	M40900045	01060905001	67zk2g	N/A	--	201 mg/dL	--	--
11 Roberts	03/01/2006 12:04AM	M61890017	00945612005	67zk2g	N/A	--	125 mg/dL	--	--

To change pages:

1. Click on a page number to display the group of data associated with the selected page.

2. Click on **Previous** or **Next** to display the previous or next group of pages, respectively.

- Results are displayed in groups of five pages.
- If there is no next page (after the last page), the Next field is disabled.
- If there is no previous page (before the first page), the Previous field is disabled.
- The group of pages displayed will only contain numbers up to the highest page. For example, if there are three pages, the Page Counter line will read: "Previous 1 2 3 Next" with both the Previous and Next fields disabled.

User Manual

This user manual is accessible as a PDF file from the **Help** menu option on the right side of the horizontal menu. The PDF document will allow you to access specific topics from the **Table of Contents** via a hyperlink.

3. Dashboard

Dashboard Overview

The **Dashboard** screen displays an overview of summary and alarm information. The Dashboard screen provides a quick summary of test result exceptions, operator certification and instrument and connectivity status. The Dashboard screen is available only if your account was granted this permission by the Administrator or POCC. The information that appears is based on a User's assigned scope and permissions.

- The alarm counts displayed in the **Dashboard** screen reflect the selection in the **Location Tree.**
- Changing your selection in the Location Tree will change the display of alarms to those for the newly selected location.
- The Tree will only display locations for which you have been assigned permission to view.

Dashboard Display Categories

The information in the **Dashboard** screen is grouped under the following separate category headers.

LIS/TEST ALARMS

NOTIFICATIONS

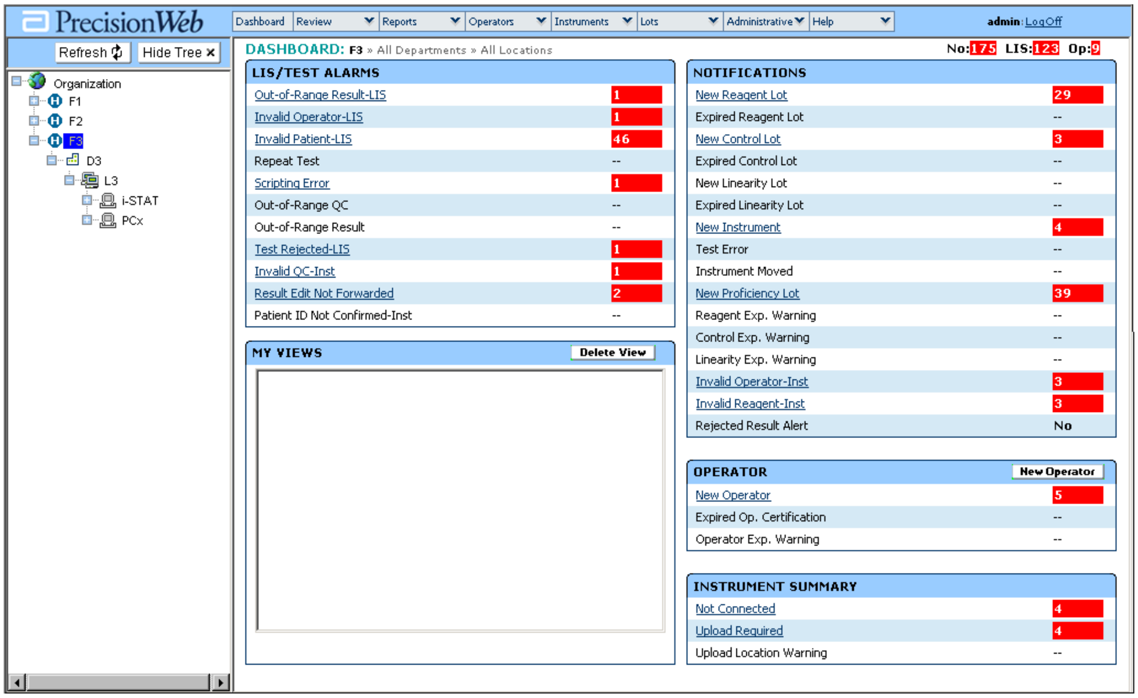
OPERATOR

INSTRUMENT SUMMARY

MY VIEWS

- The **Alarm Type** and **Alarm Count** (total unacknowledged alarms up to 99,999) for each alarm type will be displayed in the rows under each category.
- Only the rows for alarm types that you have selected to view in **My Profile** under the **Administrative** menu option will be displayed.
- Even if an **Alarm Type** is turned off from the My Profile screen alarms will continue to be created as applicable, but the alarms will not be displayed under the respective category on the Dashboard screen.
- For example, if you did not select the **Test Alarms** in the My Profile screen, the Invalid QC – Inst, Out-of-Range QC, and Out-of-Range Result, Test Error and Patient ID Not Confirmed - Inst alarm rows will not be displayed under the **LIS/Test Alarms** category header, however these alarms will still be generated (for other users), just not displayed for you.

- If you do not have Review Menu Permissions, the **My Views** list is not displayed. The Review menu permission is required to create and save custom Views.



- If there are no unacknowledged alarms for an alarm type under the respective alarm category the count column to the right of each alarm type is empty and "- - " is displayed.

- If there are unacknowledged alarms, the alarms are displayed in bold white text on red background with the corresponding Alarm Type displayed as a hyperlink (blue type, underlined).

Alarm Types

In the lists below, the alarm types chosen in **My Profile** are indicated next to the alarm.

LIS/Test Alarms

Alarm	Type	Description
Out-of-Range Result - LIS	LIS	Alarm is generated based on information returned from the LIS/HIS. Test result submitted is out of range (patient Action/Critical Range or QC Range).
Invalid Operator - LIS	LIS	Alarm is generated based on information returned from the LIS/HIS. The Operator ID associated to test result was not accepted by LIS/HIS. The Operator ID should be corrected and result resubmitted.
Invalid Patient - LIS	LIS	Alarm is generated based on information returned from the LIS/HIS. Patient ID associated to test result was not accepted by LIS/HIS. Patient ID should be corrected and result resubmitted.
Repeat Test	LIS	Alarm is generated based on information returned from the LIS/HIS. The test result submitted was a repeat test.
Scripting Error	LIS	Alarm is generated when the interface script times out before the test result is sent to LIS/HIS. Result should be resubmitted via QCM.
Out-of-Range QC	Test	Alarm is generated based on the QC Range set at time of test. Alarm is created when the test result is uploaded.
Out-of-Range Result	Test	Alarm is generated based on Action/Critical Range set at time of test. Alarm is created when the test result is uploaded.
Test Rejected - LIS	LIS	Alarm is generated based on information returned from the LIS/HIS. Test result submitted was not accepted by the LIS/HIS.
Invalid QC - Inst	Test	Alarm is generated when the QC requirement is set to Allow Test or Warn. By default Allow test is set to an interval of 24 hours, therefore, when QC is not completed every 24 hours, the system perceives that

Alarm	Type	Description
		the QC requirement is invalid or not satisfied even though the meter does not prompt to complete QC. A new alarm is created each time the instrument is uploaded until the QC requirement is satisfied. This alarm is applicable only to Abbott glucose monitors.
Result Edit Not Forwarded	LIS	Alarm is generated when a result has been modified and saved, but not resubmitted to LIS/HIS (Forward to LIS box not checked on Edit Result Record screen). The original alarm is acknowledged and the 'Result Edit Not Forwarded' alarm is created to alert that result record was changed but not sent to the LIS/HIS. If multiple changes are made this alarm is generated for each change, however, the associated alarms can be acknowledge in one step from the Edit Result Record screen.
Custom Alarms	LIS	Up to 10 custom alarms can be created. Alarms are created by Abbott personnel so that appropriate setup can take place to generate the respective alarm. Custom alarm(s) appear just below the Result Edit Not Forwarded alarm.
Patient ID Not Confirmed-Inst	Test	The instrument was unable to confirm the patient information entered, but based on configuration settings the test was allowed. This alarm is applicable only to instruments that have the Patient ID Confirmation capability.

Notification Alarms

Alarm	Type	Description
New Reagent Lot	New	Alarm is generated when a new reagent lot is used. Alarm is created upon initial upload if the reagent lot is not currently listed in QCM. If the lot is in QCM no alarm will be generated, as this alarm is generated only once per lot.
Expired Reagent Lot	Lot	Alarm is generated when a reagent lot used to run a test is past its expiration date. Alarm is created based on the expiration date entered in QCM.

***Note**: Abbott glucose test strip packaging is bar-coded. If the strip lot scanned is past its expiration date, the glucose monitor will prompt "Invalid Lot, Date Expired" and thus not allow use of the expired strip lot.*

Alarm	Type	Description
New Control Lot	New	Alarm is generated when a new control lot is used. Alarm is created upon initial upload if the control lot is not currently listed in QCM. If the lot is in QCM no alarm will be generated, as this alarm is generated only once per lot.
Expired Control Lot	Lot	Alarm is generated when a QC lot used to run a test is past its expiration date. Alarm is created based on the expiration date entered in QCM. Remember: QC bottle for glucose monitor is barcoded. If the scanned lot is used past its expiration date, glucose monitor will not allow use of the expired QC lot.

***Note**: Abbott control lot packaging is bar-coded. If the control lot scanned is past its expiration date, the glucose monitor will prompt "Invalid Lot, Date Expired" and thus not allow use of the expired control lot.*

Alarm	Type	Description
New Linearity Lot	New	Alarm is generated when a new linearity lot is used. Alarm is created upon initial upload if the linearity lot is not currently listed in QCM. If the lot is in QCM no alarm will be generated, as this alarm is generated only once per lot.
Expired Linearity Lot	Lot	Alarm is generated when a linearity lot used to run a test is past its expiration date. Alarm is created based on the expiration date entered in QCM.
New Instrument	New	Alarm is generated when a new instrument is uploaded to QCM (instrument serial number is not currently in the active database).
Test Error	Test	Alarm is generated when an instrument test error is uploaded to QCM. One alarm is created for every test

Alarm	Type	Description
		error uploaded. This alarm is applicable only to Abbott glucose monitors.
Instrument Moved	New	Alarm is generated when an instrument is uploaded with a new test result from a different location than it was previously assigned. For this alarm to be generated the Configuration Download assignment under Instruments > Configuration must be set to Download Location. If configuration Download is set to Assigned Location or if no new test results exist when the instrument is uploaded an alarm will not be created.
New Proficiency Lot	New	Alarm is generated when a new proficiency lot is used. Alarm is created upon initial upload if the proficiency lot is not currently listed in QCM. If the lot is in QCM no alarm will be generated, as this alarm is generated only once per lot.
Reagent Exp. Warning	Warning	Alarm is generated when a reagent lot is due to expire. Alarm is created based on the expiration date entered in QCM under Lots > Reagent > Single Analyte or Multi Analyte and the Expiration Date Notification (days in advance) setting under Administrative > Facility Settings. The system generates only one alarm based on this criteria; additional alarms will not be created. This alarm is facility specific. Alarm will not be created unless expiration date is defined in QCM.
Control Exp. Warning	Warning	Alarm is generated when a control lot is due to expire. Alarm is created based on the expiration date entered in QCM under Lots > Control and the Expiration Date Notification (days in advance) setting under Administrative > Facility Settings. The system generates only one alarm based on this criteria; additional alarms will not be created. This alarm is facility specific. Alarm will not be created unless expiration date is defined in QCM.
Linearity Exp. Warning	Warning	Alarm is generated when a linearity lot is due to expire. Alarm is created based on the expiration date entered in QCM under Lots > Linearity and the Expiration Date Notification (days in advance) setting under Administrative > Facility Settings. The system generates only one alarm based on these criteria; additional alarms will not be created. This alarm is facility specific.

Alarm	Type	Description
		Alarm will not be created unless expiration date is defined in QCM.
Invalid Operator - INST	Operator	Alarm is generated when the Operator Not Certified requirement is set to Allow Test or Warn. When an Operator completes a test because Lockout is not enabled and the Operator has either an expired instrument certification or is not on the current instrument Operator list an alarm is generated. When the meter is uploaded an alarm is created for each test completed by the non-certified/expired operator. This alarm is applicable only to Abbott glucose monitors.
Invalid Reagent - INST	Lot	Alarm is generated when the Strip Lot Not on List requirement is set to Allow Test or Warn. When a strip lot is used because Lockout is not enabled and the strip lot is not on the approved strip lot download list (Download to Instruments option under Lots, Reagent menu) an alarm is generated. Upon upload an alarm is created for every instance this strip lot was used to test. This alarm is applicable only to Abbott glucose monitors.

***Note**: If download list exceeds the maximum number of strip lots accepted by the glucose monitor this alarm will be created for all lots added to the download list over and above the maximum number. Expired strip lots or lots no longer in use should be removed from the download list to free up a space for new strip lots and avoid unnecessary alarms.*

Alarm	Type	Description
Rejected Result Alert	Yes or No	Alert is set to 'Yes' when inbound rejected results (uploaded test results) are present. If test result upload is successful alert will remain as 'No'.

Operator

Alarm	Type	Description
Expired Op. Certification	Operator	Alarm is generated when individual operator certification has expired for a specific instrument type. Alarm is generated on the day the certification status changes from 'due to expire' (Op Exp Warning) to 'expired' because the certification was not updated. The 'Op Exp Warning' alarm is canceled for this Operator and the certification status changed to expire. One alarm is created per Operator for the expired instrument type certification.

Alarm	Type	Description
New Operator	New	Alarm is generated when a test is completed using an Operator ID not listed in QCM (i.e. this can occur if glucose monitor is set to Allow Test or Warn for the Operator Certification requirement). Alarm is created upon upload if the Operator ID is not currently on the Operator list. If the operator ID exists no alarm will be generated.
Operator Exp. Warning	Warning	Alarm is generated when individual Operator certification is due to expire for a specific instrument type. Alarm is generated based on Expiration Date Notification setting for Operator Certification under Administration > Facility Settings. Once the Operator is expired, the status changes from due to expire to expire, and an 'Expired Op Certification' alarm is created for this Operator. This alarm cancels out the 'Expiration Warning' alarm, as the Operator certification is no longer due to expire, the Operator certification has expired, thus a duplicate alarm will not exist regarding the status of this Operator's certification. One alarm is created per Operator for the instrument type certification due to expire.

Other Dashboard Screen Features

My Views

A custom View is specific search criteria saved as a link for quick viewing from the Dashboard. Views are user specific and created from the All Results screen. Saved views will be displayed in a scrollable list box in the **My Views** section of the Dashboard screen.

Instrument Summary

A total **Alarm Count** for each **Alarm Type** will be displayed in the rows under the Instrument Summary category. Alarm Types are as follows:

Alarm	Description
Not Connected	Total number of failed terminal server or Data Repeater connections (i.e. alarms generated when there is no response from a terminal server).
Upload Required	Total numbers of instruments that have exceeded the Meter Download Warning Interval defined under Facility Settings and as such require upload (i.e. last instrument upload is older than the number of hours specified for the Meter Download Warning).

Alarm	Description

> ***Note**: Meter Download Warning Interval is independent of instrument Upload Interval setting.*

Upload Location Warning	Total number of instruments uploaded from a location other than their assigned home location.

Location Scope

The location selected in the Location Tree will affect the alarm counts displayed for the following types of alarms:

Test Location

- Any LIS/Test Alarm plus:

Invalid Operator – Inst	Invalid Reagent – Inst
New Instrument	Instrument Moved
Test Error	New Reagent Lot
Expired Reagent Lot	New Control Lot
Expired Control Lot	New Linearity Lot
Expired Linearity Lot	New Proficiency Lot
New Operator Alarm	

Operator Home Location
Operator Expiration Warning
Expired Operator Warning

Operator Upload Facility
New Operator

Reagent Location, Department or Facility
Reagent Expiration Warning

Lot Facility
Control Expiration Warning
Linearity Expiration Warning

Instrument Location
Instrument Summary Alarms

Screen Links

If there are unacknowledged alarms for an Alarm Type, and you have permission to access the linked page (All Results, Alarms, Summary and/or Operators Certification screens), the **Alarm Type** will provide a hyperlink (blue type, underlined) that will display information for the selected alarm(s) by linking to certain screens depending on the alarm category.

If there are no unacknowledged alarms or you do not have permission to view the associated screens, the **Alarm Type** name will not provide a link.

Clicking on an **Alarm Type** hyperlink will display information for the selected Alarm with the following links according to the category:

LIS/Test Alarms

Clicking on any of the hyperlinked LIS/Test Alarm rows will display the **All Results** screen with the following search criteria applied automatically:

Result-Based Alarm	Will display alarm type
Alarm Status	Will display "Unacknowledged"
All Dates	No date filter entry

> ***Note***: *The program assumes you do not want to set a date range filter, since you want to see which alarm caused the link to appear on the dashboard. If you were to filter by date range, you may not see all of the alarms. The date range should remain blank unless you want to see a specific date-range subset of the alarms.*

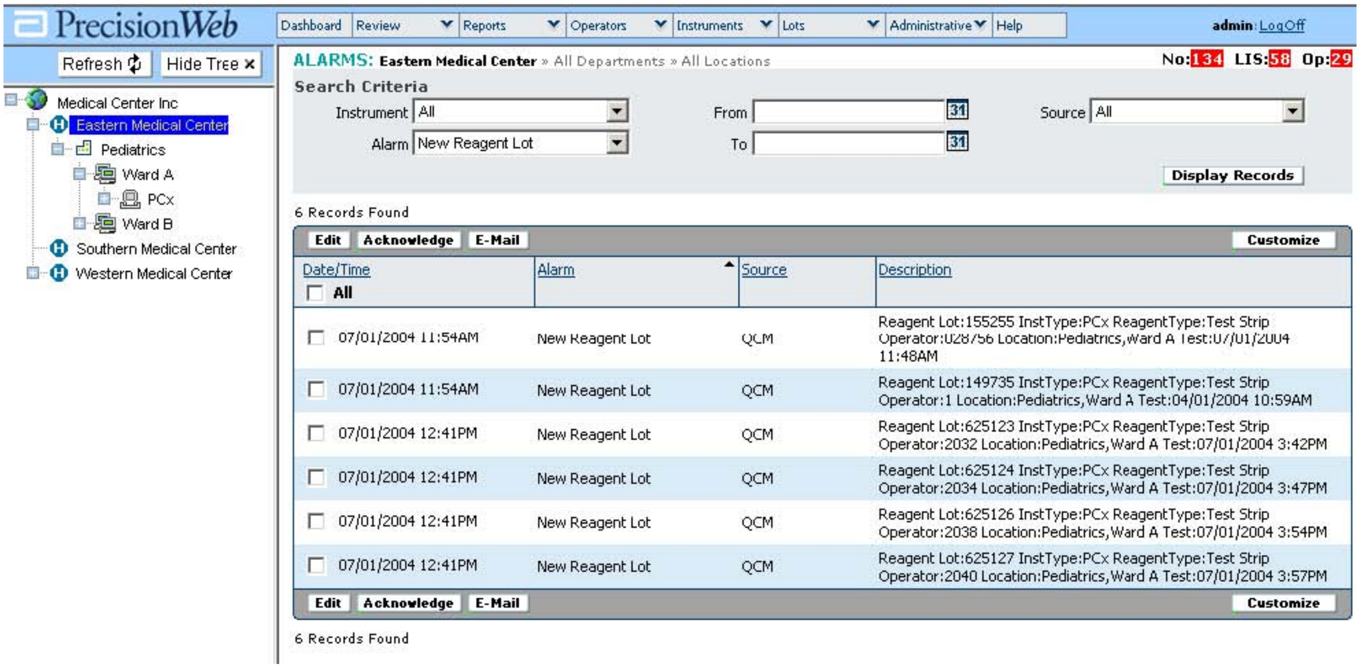
- When clicking the LIS/Test Alarm hyperlink, the All Results screen is displayed. The filtered data is listed on the bottom half of the screen just below the Search Criteria. The selected LIS/Test Alarm for each record in the table is unacknowledged and highlighted in red. The data displayed is filtered for the facility, department or location selected in the Tree. If multiple alarms are present for a specific record, more than one item may be highlighted in red.

Notification Alarms

- Clicking on any of the linked **Notifications** rows will display the **Alarms** screen with the **Alarm** field automatically filtered for the alarm type you have selected from the **Dashboard** screen. The filtered data is listed on the bottom half of the screen just below the Search Criteria.

- The selected Alarm for each record in the table is unacknowledged. The data displayed is filtered for the facility, department or location selected in the Tree.

- There will be no link from the **Rejected Result Alert** row. Rejected Result Alert will display 'No' or 'Yes'. If the Rejected Result Alert displays 'Yes' contact Technical Support for assistance.



Operator Alarms

- Clicking on any of the linked **Operator** rows (New Operator, Expired Op. Certification and Operator Exp. Warning) will display the **Operator Certification** screen.
- The **Status** field is automatically filtered for the alarm type you have selected from the **Dashboard** screen.
- The **Instrument** field will be pre-selected to "All" in order to include all instrument types.
- The filtered data is listed on the bottom half of the screen just below the Search Criteria.
- The selected Alarm for each record in the table is unacknowledged. The data displayed is filtered for the facility, department or location selected in the Tree.

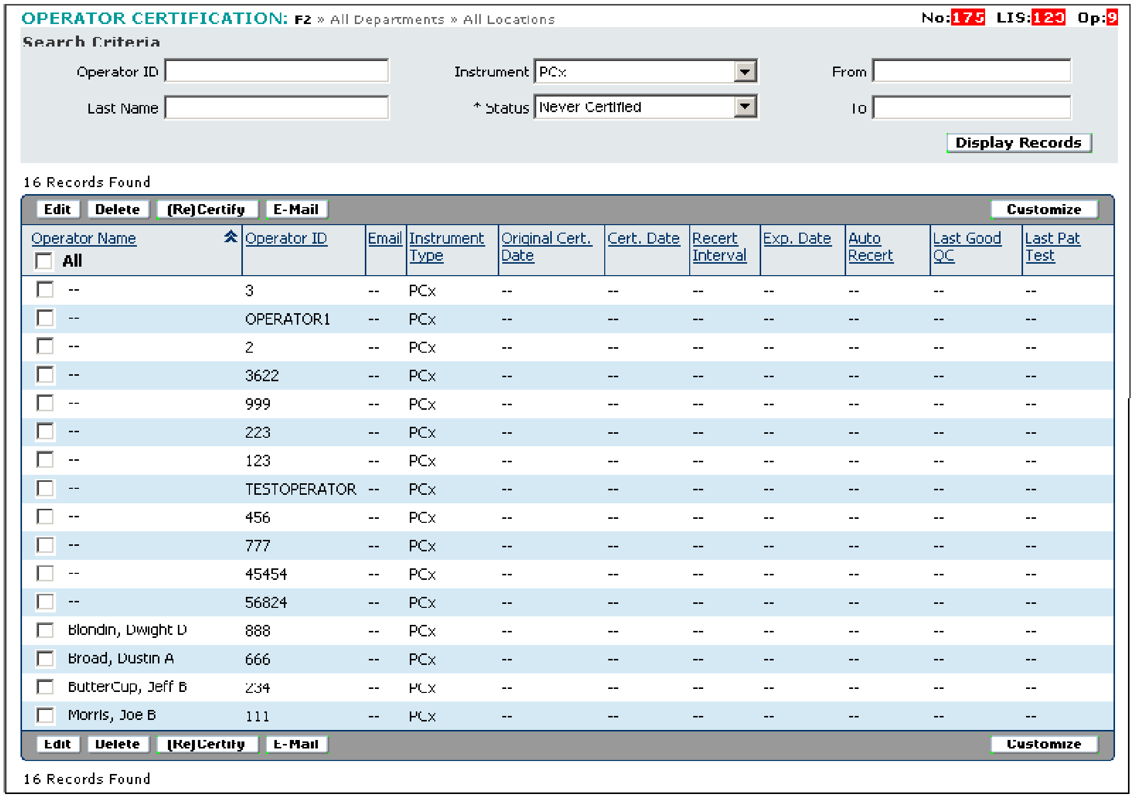
New Operator Alarm

- Clicking on this link will display the **Operator Certification** screen showing new operators who have never been certified for any instrument type.
- Duplicate rows will be present for each operator; one row for each instrument type certification. For an operator to be certified for a specific instrument type the operator certification information must be entered via Edit Certification screen by selecting the (Re)Certify button. If the operator has not been certified for a specific instrument type, certification details will remain blank and the operator is not considered certified for the specified instrument type. An operator may be certified for one or more instrument types.
- The Search Criteria in the **Operator Certification** screen are automatically filled in as follows:

Instrument	All
Status	Never Certified
From (date)	Blank
To (date)	Blank

- Select the Instrument from the Search Criteria (the screen will automatically refresh, this may take a few seconds) then check the box next to the Operator(s) that require certification. Click the **Edit** button, and enter demographic information for each Operator, including a home location by selecting the respective location in the Tree.

- The demographic information will only need to be entered once per operator (even if there are multiple instrument type rows for an operator).



OPERATOR CERTIFICATION: F2 » All Departments » All Locations No:175 LIS:120 Op:9

Search Criteria

Operator ID Instrument PCx From

Last Name * Status Never Certified To

Display Records

16 Records Found

Edit Delete (Re)Certify E-Mail Customize

Operator Name	Operator ID	Email	Instrument Type	Original Cert. Date	Cert. Date	Recert Interval	Exp. Date	Auto Recert	Last Good QC	Last Pat Test
All										
--	3	--	PCx	--	--	--	--	--	--	--
--	OPERATOR1	--	PCx	--	--	--	--	--	--	--
--	2	--	PCx	--	--	--	--	--	--	--
--	3622	--	PCx	--	--	--	--	--	--	--
--	999	--	PCx	--	--	--	--	--	--	--
--	223	--	PCx	--	--	--	--	--	--	--
--	123	--	PCx	--	--	--	--	--	--	--
--	TESTOPERATOR	--	PCx	--	--	--	--	--	--	--
--	456	--	PCx	--	--	--	--	--	--	--
--	777	--	PCx	--	--	--	--	--	--	--
--	45454	--	PCx	--	--	--	--	--	--	--
--	56824	--	PCx	--	--	--	--	--	--	--
Blondin, Dwight D	888	--	PCx	--	--	--	--	--	--	--
Broad, Dustin A	666	--	PCx	--	--	--	--	--	--	--
ButterCup, Jeff B	234	--	PCx	--	--	--	--	--	--	--
Morris, Joe B	111	--	PCx	--	--	--	--	--	--	--

Edit Delete (Re)Certify E-Mail Customize

16 Records Found

Expired Op. Certification Alarm

- Clicking on this link will display the **Operator Certification** screen showing operators whose certification has expired for a specific instrument type.

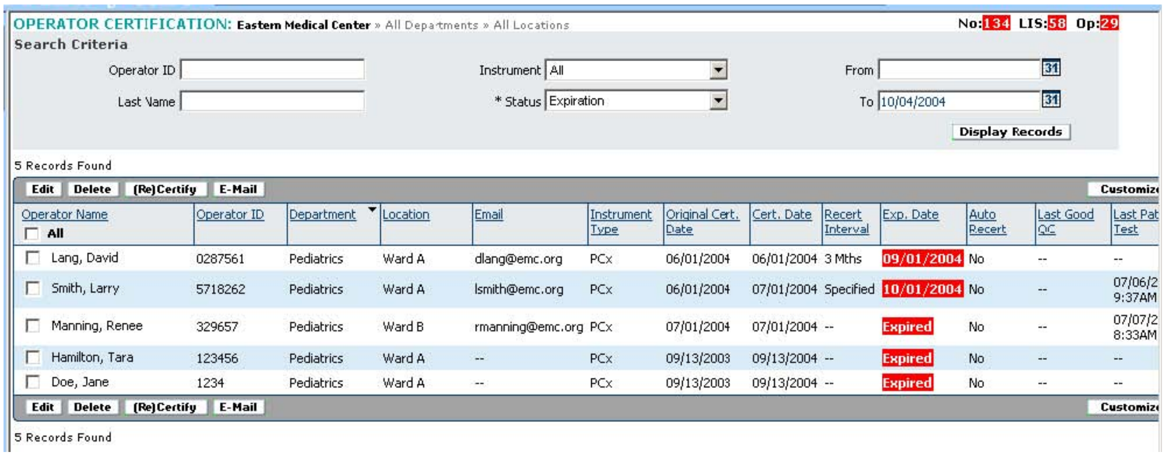
- There may be duplicate rows per operator if the operator has not been certified for a specific instrument type.

- The Search Criteria in the **Operator Certification** screen are automatically filled in as follows:

Instrument	All
Status	Expiration
From (date)	Blank
To (date)	Current date

- Select the Instrument from the Search Criteria (the screen will automatically refresh, this may take a few seconds) then check the box next to the Operator(s) that require Re-certification, Click the **(Re)Certify** button, and enter the updated certification information.

- Operator demographics cannot be updated via the (Re)Certify button. Select the Edit button to update Operator demographics. To change the Operator's home location select a new location in the Tree. The Operator ID field is the only field that cannot be modified.



Operator Exp. Warning Alarm

- Clicking on this link will display the **Operator Certification** screen showing operators whose certification will expire for a specific instrument type within the amount of time specified for the facility (Operator Expiration Date Notification defined under Facility Settings).

- There may be duplicate rows per operator if the operator certification is expired for more than one instrument.

- The Search Criteria in the **Operator Exp. Warning** screen are automatically filled in as follows:

Instrument	All
Status	Expiration
From (date)	Next day's date
To (date)	Future date corresponding to Facility setting for Operator Expiration Date Notification (Days in Advance)

- Select the Instrument from the Search Criteria (the screen will automatically refresh, this may take a few seconds) then check the box next to the Operator(s) that require Re-certification, Click the **(Re)Certify** button, and enter the updated certification information.

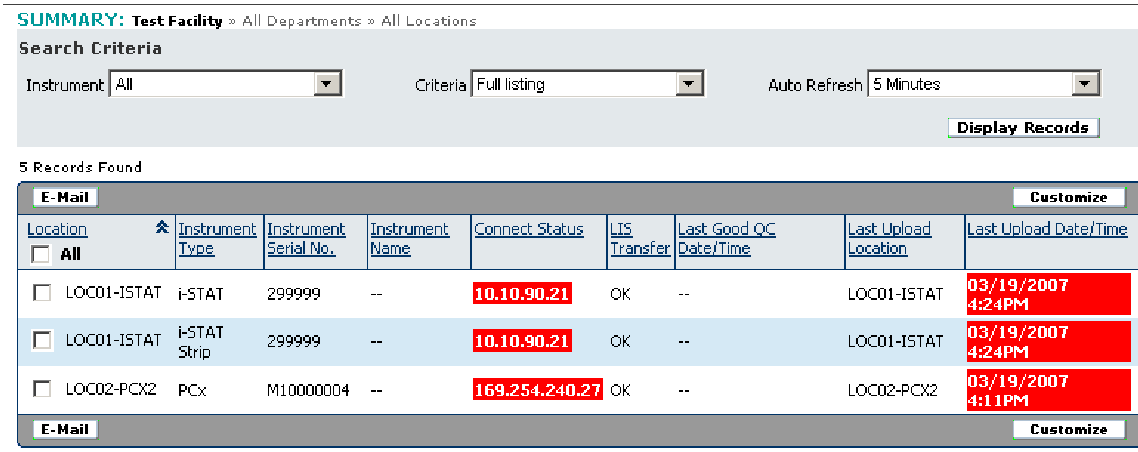
- Operator demographics cannot be updated via the (Re)Certify button. Select the Edit button to update Operator demographics. To change the Operator's home location select a new location in the Tree. The Operator ID field is the only field that cannot be modified.

Instrument Summary

Clicking on the **Not Connected**, **Upload Required**, or the **Upload Location Warning** rows under the **Instrument Summary** category header will display the current Instrument Summary screen with default search criteria.

The Search Criteria in the **Instrument Summary** screen are automatically filled in as follows:

Instrument	All
Criteria	Errors Only
Auto Refresh	5 Minutes



My Views

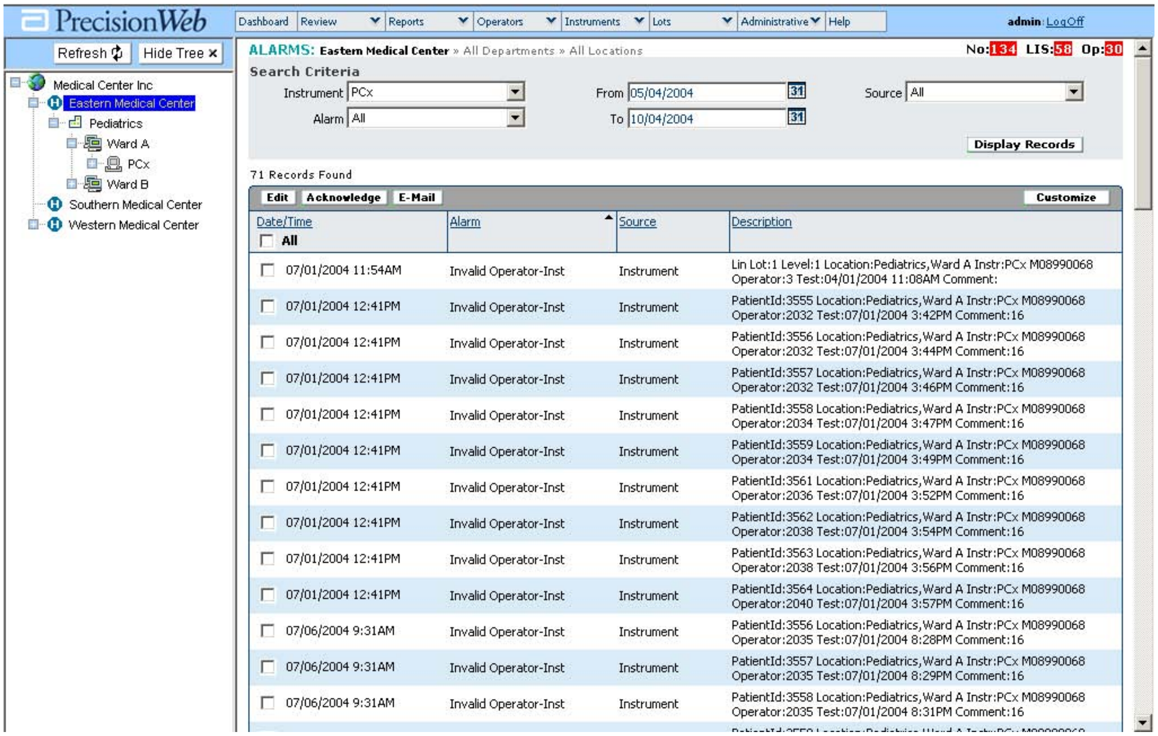
Double-clicking a **View** will display the **All Results** screen with the name of the selected view at the beginning of the **Breadcrumb Trail** *in place of the words* "All Results." Creating a View will save the current table column configuration, and search criteria. However, the current Tree selection will not be saved as part of a View. (See Chapter 4, Review for more information on My Views.)

> ***Note:*** *Date range search criteria will be saved when 'Period' is selected and a range chosen from the drop down box. Date range search criteria will not be saved if a range is entered into the 'From' and 'To' fields.*

To select a View:

1. Double-click on the underlined text (hyperlink).

2. The name of the selected View from the **My Views** category will be displayed at the beginning of the **Breadcrumb Trail** at the top of the new screen (In the screen shot below it is **PCx – Patient Results:**).



To edit a View:

1. Modify the **Search Criteria** in the **All Results** screen.

2. Click the **Save To My Views** button.

3. A pop-up will appear that will display the name of the previously saved view.

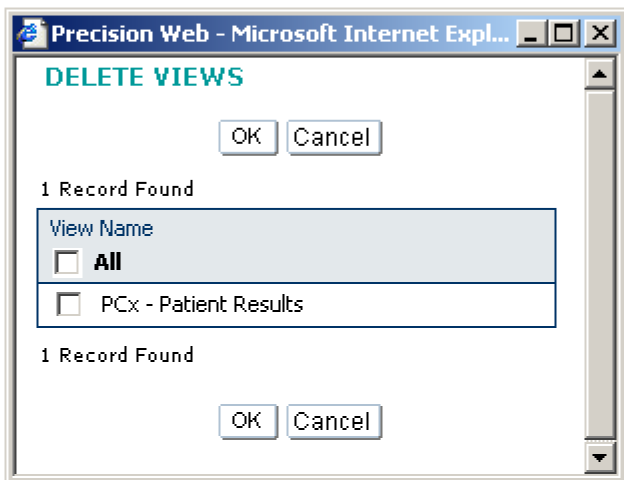
4. Click the **Save** button in the pop-up to save the modified criteria under the previously saved View name.

Notes:

- *If you modify the **View** name in the pop-up before saving, a new View will be saved and added into the Dashboard's list of Views.*
- *If you modify the table column selections using the **Customize** button at the far right end of the Action Bar prior to clicking on **Save To My Views**, the changes to the column selections will not only be displayed in the newly saved view, but whenever you return to the **All Results** screen.*
- *If you would like to modify the column selections for a particular View, but not for the All Results screen, after saving the View, you must click on the **Customize** button once again (after having saved the view) and change the column selections back to their original settings.*
- *If you do not have the **Review All Results** Menu Permissions, the **My Views** category is not displayed.*

Delete a View:

The **Delete View** button under the **My Views** category header displays a **pop-up** that allows you to delete selected views.



To **delete** a View:

1. Click on the **Delete View** button.
2. Click on **All** to select all views for deletion, or
3. Select one or more options one at a time for deletion. Deselecting **All** clears all selection options.
4. Click the **OK** button to delete the selected view(s) and close the pop-up or Click the **Cancel** button to close the pop-up without deleting the selected views.

4. Review

Review Overview

The **Review** menu option provides access to five screens for use in managing instruments, test results and alarms. The **Summary** screen provides information on instrument status. The **Alarms** screen allows you to manage alarms and notifications. The **All Results** screen allows you to review and manage both patient and QC test results. The **Patient Results** screen provides a simple view of patient test results only. The **Patient Lookup** screen allows you to retrieve current patient data for any Facility in your organization. Each screen is available only if your account was granted this permission by the Administrator or POCC.

Summary Screen

Review>>Summary

The **Summary** screen allows you to view instrument summary information on the connection status, the last good "QC" performed and the last upload time and location.

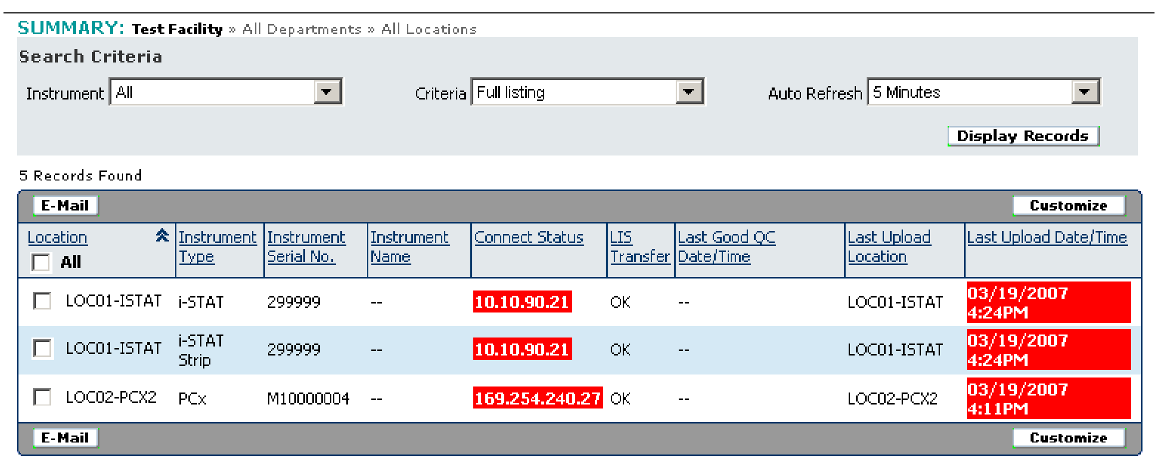
Summary information can be viewed by Facility, Department or Location.

To **view** summary information:

1. Move the mouse cursor over **Review** in the Menu Bar to display the menu options.
2. Click on the Summary option.

The **Summary** screen displays the Summary table based on the location highlighted in the Tree and the system default Search Criteria.

To **view** summary information from a different location click on a **Facility**, **Department** or **Location** in the Tree.



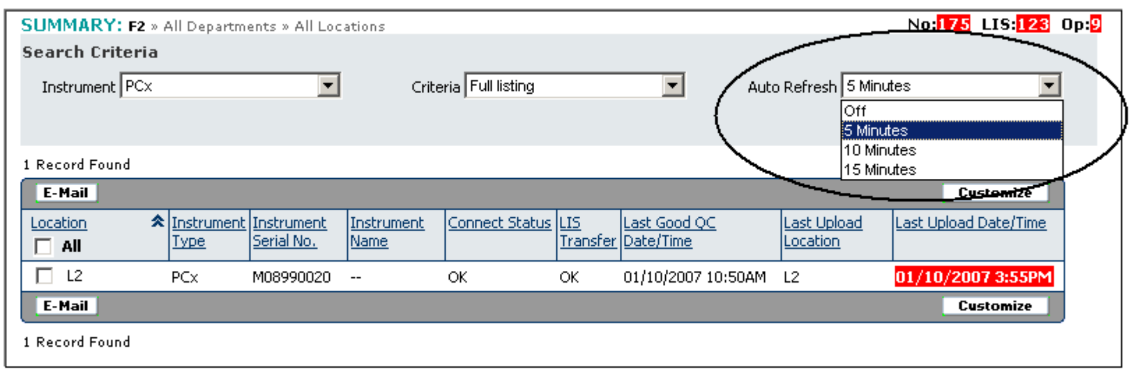
Search Criteria

The available search criteria options on the **Summary** screen are:

Instrument	All	System displays summary information for all instrument types.
	Instrument X	System only displays summary information for the selected Instrument type.
Criteria	Full listing	System displays all instrument records.
	Errors only	System only displays instruments with error information.

Click the **Display Records** button to display the records based on the selected search criteria options.

The **Auto Refresh** option on the **Summary** screen allows you to select how often the information in the Summary table is automatically updated.



The system default setting for Auto Refresh is set to update information every **5** minutes.

To select a different time interval or to turn the auto refresh option off, select from the dropdown list (Off, 5, 10 or 15 minutes).

If **Off** is selected, information is only refreshed if the **Display Records** button is clicked or when a different location in the Tree is selected.

If **Auto Refresh** is enabled, the information on the Summary screen is automatically refreshed at the specified interval in the **Auto Refresh** field. The auto refresh only occurs when the Summary screen is displayed. If the Auto Refresh option is enabled, then the application will not automatically log the user off due to inactivity.

- Selecting the Display Records button will update the information displayed on the Summary screen.
- The information displayed on the Summary screen will update in real-time on the Dashboard screen.

Table

Column Header Notes

Connect Status column displays:

- **OK** if the terminal server or data repeater terminal is responding to network requests.
- **IP Address** with red background if the terminal server or data repeater terminal failed to respond to network requests.
- **N/A** if the instrument communicates via a local serial COM port connection.

LIS Transfer column displays:

- **OK** if the last data transfer to the LIS was successful.
- **FAIL** with red background if the last data transfer to the LIS failed.
- **N/A** if there is no interface to the LIS.

Last Good QC Date/Time column displays:

- The date and time of the last successful (passing) QC done on the instrument.
- A red highlighted date of the last known successful QC if the specified QC interval requirement is exceeded.

Last Upload Location column displays:

- The last upload location column displays the name of the last upload location for that instrument.
- The location name will appear in red if the instrument's last upload location is different than its home location in the Tree.

Last Upload Date /Time column displays:

- The date and time of the last upload.
- A red highlighted date and time if the specified time interval for the Meter Download Warning in Facility Settings screen is exceeded.

E-Mail a Summary Record

To **e-mail** a single summary record or multiple summary records:

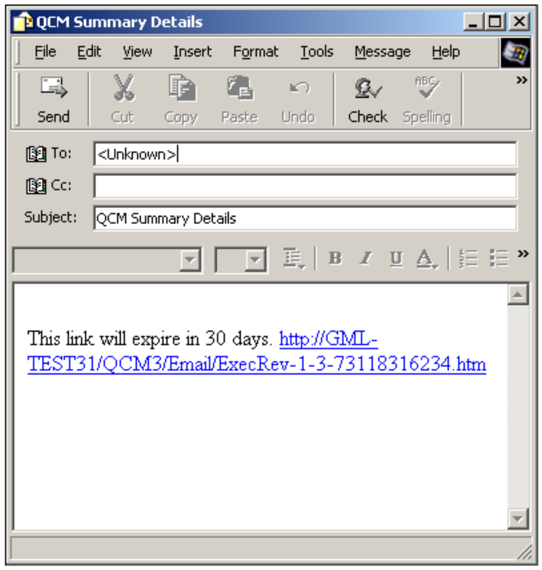
1. Select one or more records in the table by click on the box(es) in the Location column.
2. Click the **E-Mail** action button.

To **e-mail** all summary records:

1. Click on the box marked **All** in the Location column header.
2. Click the **E-Mail** action button.

The default e-mail client opens a new mail message and includes the menu option title in the subject field.

The body of the message includes a hyperlink to an .htm file that contains the selected records. Linked files will expire after 30 days.



Alarms Screen

Review>>Alarms

The **Alarms** screen allows you to view, edit, acknowledge and e-mail alarm records.

If a test result has more than one alarm, each alarm is displayed in a separate row.

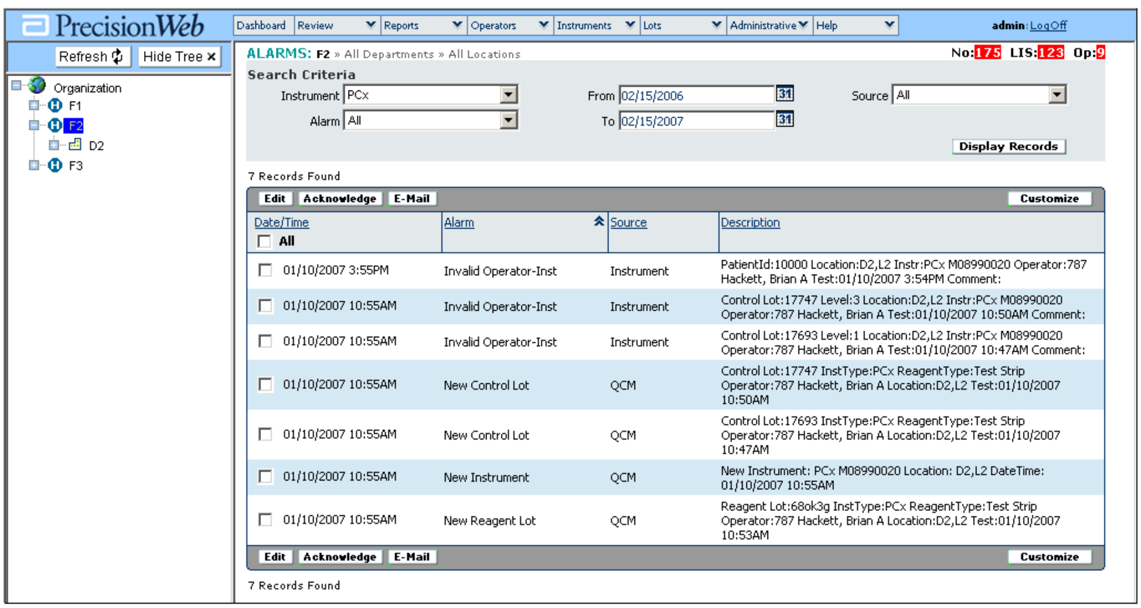
To **view** alarm records:

1. Move the mouse cursor over **Review** in the Menu bar to display the menu options.

2. Click on the **Alarms** option.

The **Alarms** screen displays the Alarms table based on the location highlighted in the Tree and the system default Search Criteria.

To display alarm records from a different location using the same search criteria, click on a **Facility**, **Department** or **Location** in the Tree.



Search Criteria

The available search criteria options on the **Alarms** screen are:

Criteria	Options	Description
Instrument		Allow you to view records by instrument type.
	All	System displays alarm records from all instrument types.
	Instrument X	System displays alarm records only for the selected Instrument type.
Alarm		Allow you to view records by a specific alarm type in the Alarm dropdown list.
	All	System displays all records of all alarm types from the **Notifications** list.
		System displays records of a single alarm type from the Notifications list if a single alarm is selected from the dropdown list.
Date Range Filter		Pop-up calendar allows you to filter the alarms by date range in the From and To fields. The date currently associated with the alarm and displayed in the records table (upload date or test date) will be used for the filter. Alarms with dates on or between the entered dates will be displayed. You can also enter dates into the fields without using the calendar pop-ups.
Source		Allow you to select alarms generated by all sources or by a single source.
	All	System displays alarms generated by all sources.
	Instrument	System only displays alarms generated by instruments.
	QCM	System only displays alarms generated by QCM3.

Click the **Display Records** button to display the records based on the selected search criteria options.

Edit Alarm Records

To **edit** a single alarm record or multiple alarm records:

1. Select one ore more records in the table by click on the box(es) in the Date/Time column.

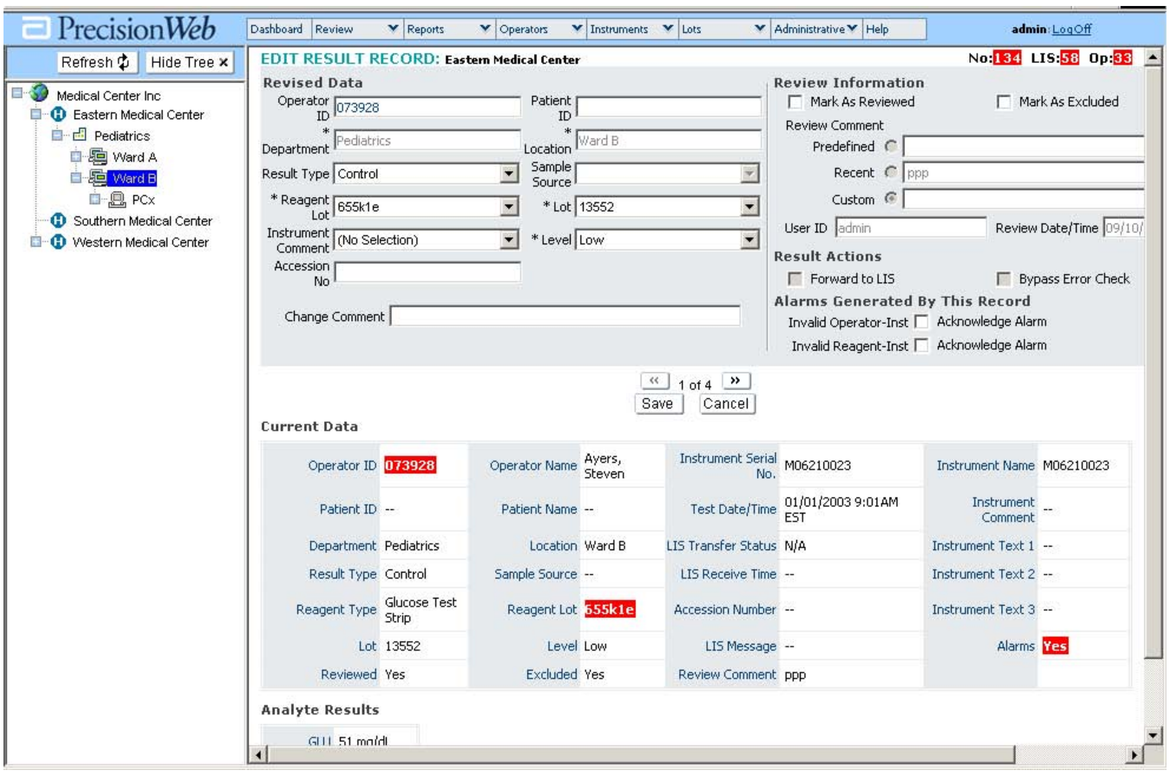
2. Click the **Edit** action button.

Note: *Only result-based alarms can be edited.*

To **edit** all alarm records:

1. Click on the box marked **All** in the Date/Time column header to select all records.
2. Click the **Edit** action button.

- The **Edit Result Record** screen appears with the data row of the first selected record to be edited. If multiple records are selected each record is displayed on a separate page.
- This same screen is accessed via the **All Results** screen (see Chapter 4, Review, Section Edit Results).



To view the selected result records, click on the » right arrow to view the **next** record or click on the « left arrow to view the **previous** record.

The following entry fields can be edited:

Field	Description
Operator ID	Enter the correct Operator ID number. Entry field accepts up to a **maximum** of 30 characters.
Patient ID	Enter the correct Patient ID number. Entry field accepts up to a **maximum** of 30 characters. Field is disabled if the record is not associated with a Patient test.
Department	Click on a **Department** in the Tree. The read-only field for Department automatically displays the selected department.

Field	Description	
Location	Click on a **Location** in the Tree. The read-only field for Location automatically displays the selected location.	
Result type	**Patient**	Enables the Patient ID, Reagent Lot and Sample Source fields for editing.
	Control	Enables the Lot and Level fields for editing.
	Linearity	Enables the Lot and Level fields for editing.
	Proficiency	Enables the Lot field for editing.
Sample Source	Enabled only if Patient result record is selected. Select sample source from the dropdown list.	
Reagent Lot	Enabled only if Patient result record is selected. Select reagent lot from the dropdown list.	
Lot	Enabled only if QC, Proficiency or Linearity result record is selected. Select lot from the dropdown list.	
Instrument Comment	Select an instrument comment code from the dropdown list.	
Level	Enabled only if QC or Linearity result record is selected. Select Low, Normal or High for QC. Select level numbered L1 through L10 for Linearity.	
Change Comment	Enter a comment related to the reason for editing the record.	
Review Information	☐ Mark as Reviewed	☐ Mark as Excluded

Note: *When a result record is marked as excluded, QCM3 automatically marks the record as reviewed.*

Predefined	Select a predefined comment from the dropdown list. This selection disables the custom comment field.
Custom	Enter a custom comment (up to 60 alphanumeric characters) in the entry field. This selection disables the predefined comment field.

Note: *If a custom comment is entered it will be added to the custom comment selection list. The list supports up to ten custom comments. If an eleventh comment is added, the first comment entered is removed from the selection list.*

Result Actions	☐ Forward to LIS	☐ Bypass Error Check

3. Click the **Save** button to save the edited record. The next selected record is displayed, or Click the **Cancel** button to cancel the edit action without saving.

> ***Note:*** *The original record is saved intact for audit purposes. The edited record is saved and stamped with the User ID and the date and time the record was edited.*

Acknowledge Alarm Records

To **acknowledge** a single alarm record or multiple alarm records:

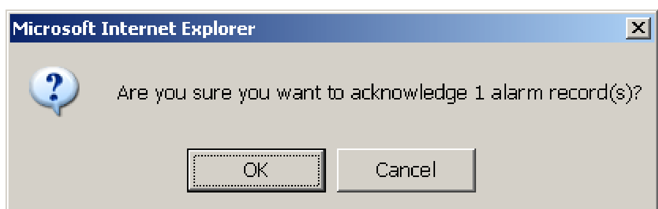
1. Select one ore more records in the table by click on the box(es) in the Date/Time column.
2. Click the **Acknowledge** action button.

To **acknowledge** all alarm records:

1. Click on the box marked **All** in the Date/Time column header.
2. Click the **Acknowledge** action button.

Warning Message

When the **Acknowledge** action button is clicked the following warning message is displayed:



- Click the **OK** button to mark the selected record(s) as acknowledged in the database.
- Click the **Cancel** button to cancel the acknowledge action.

E-Mail Alarm Records

To **e-mail** a single alarm record or multiple alarm records:

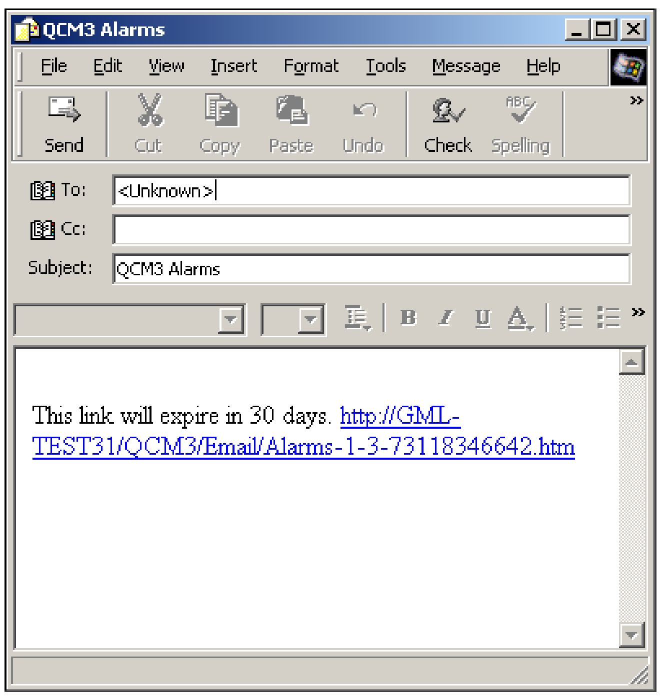
1. Select one or more records in the table by clicking on the box(es) in the Date/Time column.
2. Click the **E-Mail** action button.

To **e-mail** all alarm records:

1. Click on the box marked **All** in the Date/Time column header.
2. Click the **E-Mail** action button.

The default e-mail client opens a new mail message and includes the menu option title in the subject field.

The body of the message includes a hyperlink to an .htm file that contains the selected records. Linked files will expire after 30 days.



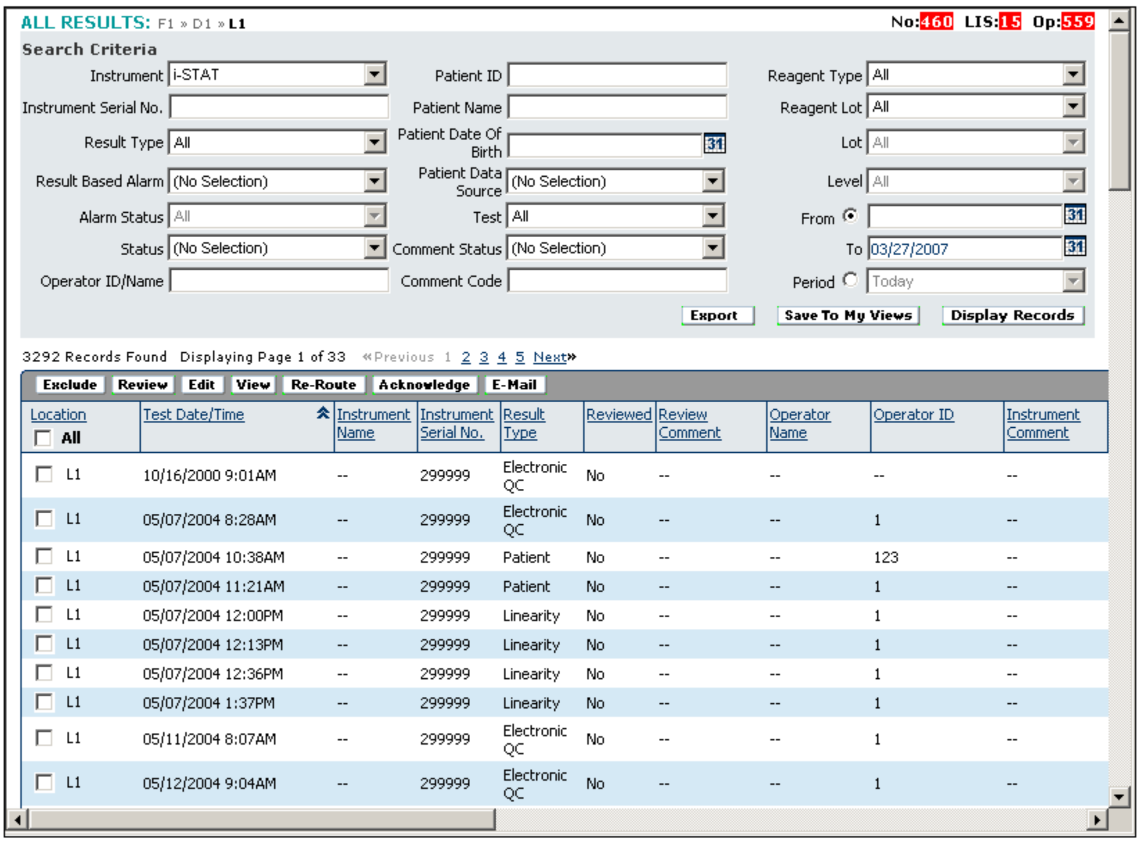
All Results Screen

Review>>All Results

The **All Results** screen allows you to exclude, review, edit, view, re-route, acknowledge and e-mail patient, linearity, proficiency, control test results and electronic QC. Records that meet the specified search criteria may be viewed or exported. The search criteria may also be saved to the Dashboard My Views sections.

To **view** result records:

1. Move the mouse cursor over **Review** in the Menu Bar to display the menu options.
2. Click on the **All Results** option.



- The **From** and **To** date fields are filled in by default with today's date. To display records you must first set the **From** Date.

- The **All Results** screen displays the Table based on the location highlighted in the Location Tree and the system default Search Criteria.

To display result records from a *different* location using the same search criteria, click on a **Facility**, **Department** or **Location** in the Location Tree.

- Use the Search Criteria options to display specific result records.

- The information in the Table in the bottom half of the screen is refreshed based on the Search Criteria selected and location highlighted in the Location Tree.

- Click the **Display Records** button to display the results based on the selected search criteria options. You can also display the results that meet the selected criteria by hitting the "Enter" key on your keyboard after changing the search criteria.

Search Criteria

The available **Search Criteria** options on the **All Results** screen are:

Criteria	Option	Description
Instrument	**All**	System displays all instrument results.
	Instrument X	System displays results only from the selected Instrument type. The screen refreshes automatically when you change instrument types, but does not display new records until the **Display Records** button is clicked.
Instrument Serial No.		Entry field for instrument serial number. System only displays test results from the instrument that matches, or is similar to, the serial number entered.
Result type	**All**	System displays results from patient, control, Electronic QC, linearity and proficiency tests.
	Various Result Types	System only displays test results with the selected result type.
Result-Based Alarm	**No Selection**	Selection System displays all test results.
	All	System only displays results with associated "result-based" alarms.
	Various Alarm Types	System displays results based on the selected alarm type.
Alarm Status	**All**	Selection System displays status of both acknowledged and unacknowledged alarms.
	Acknowledged	System only displays acknowledged alarms.
	Unacknowledged	System only displays unacknowledged alarms. This control is disabled if "No Selection" is specified in the **Result-based Alarm** field.
Status	**No Selection**	System displays results regardless of their status: Pending Review, Reviewed, Excluded, Not Excluded, LIS Transferred, or LIS Not Transferred.
	Various Status Selections	System only displays results with the selected status type.

Criteria	Option	Description
Operator ID/Name		Entry field for Operator ID or Name System only displays results that match or are similar to the ID or Name entered.
Patient ID		Entry field for Patient ID System only displays results that match or are similar to the ID entered.
Patient Name		Entry field for Patient Name System only displays results that match or are similar to the name entered.
Patient Date of Birth		Entry field for Patient Date of Birth System only displays results that match or are similar to the date of birth entered.
Patient Data Source	**No Selection**	Default
	QCM	Indicates that the Patient ID was updated in QCM from the Edit Result screen.
	Instrument	Indicates that Admission, Discharge, and Transfer data for a test is set by the instrument (this Information is originally uploaded to the instrument by QCM).
	LIS	Indicates that Admission, Discharge, and Transfer data for a test was updated with information from the LIS.
Test	**All**	System displays all test results.
	Various Test Types	System only displays results from selected test type.
Comment Status	**No Selection**	Default
	No Comment	
	Any Commented	
	Specific	System allows you to enter a comment code number into entry field below.
Comment Code		If "Specific" was chosen under **Comment Status** (above), you can enter a comment code number here. The other choices under Comment Status will disable the Comment Code field.
Reagent Type	**All**	System default, which displays results from any reagent product.
	Reagent X	System displays results only from the selected reagent. The choices available vary depending on Instrument type selected.

Criteria	Option	Description
Reagent Lot	**All**	System default
	Various Reagent Lot Selections	Select from the dropdown list or Name entered. The choices available vary depending on Reagent Type selected.
Lot		The Lot list is enabled if the **Result Type** search criterion selected is Control, Linearity or Proficiency.
Level		The Level list is enabled if the Result Type search criterion selected is Control or Linearity. Control: Choices are All, High, Low, or Normal. Linearity: Choices are L1 to L10.
Date Range		System default displays today's date. Enter or select a **From** and a **To** date to display test results that were performed between the selected dates.
	From	Click on the calendar icon to display the pop-up calendar and click on a date. The **From** date field automatically displays the selected date.
	To	Click on the calendar icon to display the pop-up calendar and click on a date. The **To** date field automatically displays the selected date – ***required.***

To Export Current View

1. Click the **Export** button to export all records that match the current search criteria.
   - All data fields associated with each record will be exported into a comma-separated value (CSV) file. This CSV file may then be accessed with a spreadsheet program such as Microsoft Excel.

2. An Internet Explorer dialogue box will appear. Click **Save** to save the data file or **Open** to open it directly in the default application for the CSV file type.
   - The default application for CSV files is set by the Windows Folder Options control panel. To set the default application, open 'Folder Options' in the Windows Control Panel.
     1. Select Start > Settings > Control Panel.
     2. Open the 'Folder Options' file folder.
     3. Select the 'File Types' tab and scroll down to the CSV file type.
     4. Verify that Microsoft Excel is selected as the default application for CSV files. If not, select the 'Change' button to set Microsoft Excel as the default application and click 'OK'.

5. Select the 'Advanced' button and verify that the "confirm open after download" option is not checked. If this box is checked, uncheck it and click 'OK'.
6. Click 'Close'

- The default name selected is 'Export.csv'. If a file with the same name exists, then Internet Explorer functionality will append '[x]' to the file name (where 'x' is a number that makes the file name unique). These brackets in the file name may cause an error if the file is opened then saved using Microsoft Excel. A unique name should be provided to all export files.
- The data displayed in the All Results grid and the data exported will match. Pressing the Export button will export data for the current search criteria selection and also refresh the data displayed in the All Results grid.
- The first row of the export file will contain column headings. Test data will be exported starting on the second row.
- Each test record in QCM will be exported in one row. For each unique result associated with a test in the dataset, additional columns will be appended. The first column heading will contain the analyte name. The result value will be exported in this column. The second column heading will contain the analyte name followed by the static text "Unit". The unit associated with the result will be exported in this column. If a test is not associated with a particular analyte, then the column values will be left empty for that analyte.
- Each row of data contains the following thirty (30) record-specific columns:
  - *Operator ID*
  - *Operator Name*
  - *Instrument Serial No.*
  - *Instrument Name*
  - *Patient ID*
  - *Patient Name*
  - *Patient Date of Birth*
  - *Patient Gender*
  - *Patient Data Source*
  - *Test Date/Time*
  - *Accession Number*
  - *LIS Transfer Status*
  - *Instrument Comment*
  - *Department*
  - *Location*
  - *LIS Receive Time*
  - *Instrument Text 1*
  - *Instrument Text 2*
  - *Instrument Text 3*
  - *Result Type*
  - *Sample Source*
  - *Alarms*
  - *Reagent Type*
  - *Reagent Lot*
  - *Excluded*
  - *Lot*
  - *Level*
  - *Reviewed*
  - *Review Comment*
  - *LIS Message*

If the csv file is opened in Microsoft Excel the display will appear as follows:

	A	B	C	D	E	F	G	H	I
1	Operator ID	Operator Name	Instrument Serial No.	Instrument Name	Patient ID	Patient Name	Patient Date of Birth	Patient Gender	Patient Data Source
2	28365	Unser, Nicole/NICUB	300836		0				

	J	K	L	M	N	O	P	Q
1	Test Date/Time	Accession Number	LIS Transfer Status	Instrument Comment	Department	Location	LIS Receive Time	Instrument Text 1
2	03/03/2006 1:16PM		N/A		Hoblitzelle Building	NICU		

	R	S	T	U	V	W	X	Y	Z	AA	AB	AC
1	Instrument Text 2	Instrument Text 3	Result Type	Sample Source	Alarms	Reagent Type	Reagent Lot	Excluded	Lot	Level	Reviewed	Review Comment
2			Patient	Unknown	No	G3+	unspecified	No			No	

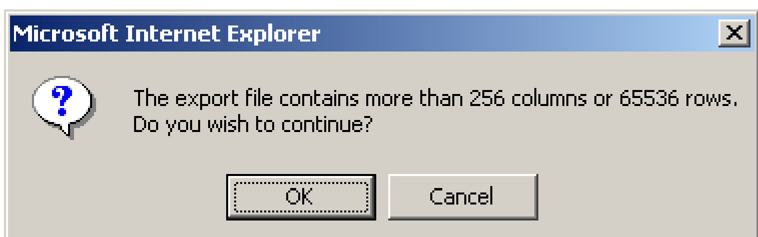
	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM
1	LIS Message	BatteryVoltage	Uses	Software	PreferencesName	PreferencesRevision	ID	MethodName	PanelCode	StaroutCode
2		8.40V	8968	JAMS119J-A10	062099HB	5	00 300836 8968	i-STAT	0C	0

	AN	AO	AP	AQ	AR	AS	AT	AU	AV	AW	AX	AY	AZ	BA
1	FluidCode	ISTATID	pH	pH Unit	pH ValueType	pH RefLo	pH RefHi	pH ActLo	pH ActHi	TCO2	TCO2 Unit	TCO2 ValueType	TCO2 RefLo	TCO2 RefHi
2	0	13	7.293		Measured	7.35	7.45	7.2	7.6	26	mmol/L	Calculated	24	29

	BB	BC	BD	BE	BF	BG	BH	BI	BJ	BK	BL	BM	BN
1	PO2	PO2 Unit	PO2 ValueType	PO2 RefLo	PO2 RefHi	PO2 ActLo	PCO2	PCO2 Unit	PCO2 ValueType	PCO2 RefLo	PCO2 RefHi	PCO2 ActLo	PCO2 ActHi
2	62	mmHg	Measured	75	100	50	51.2	mmHg	Measured	35	45	20	60

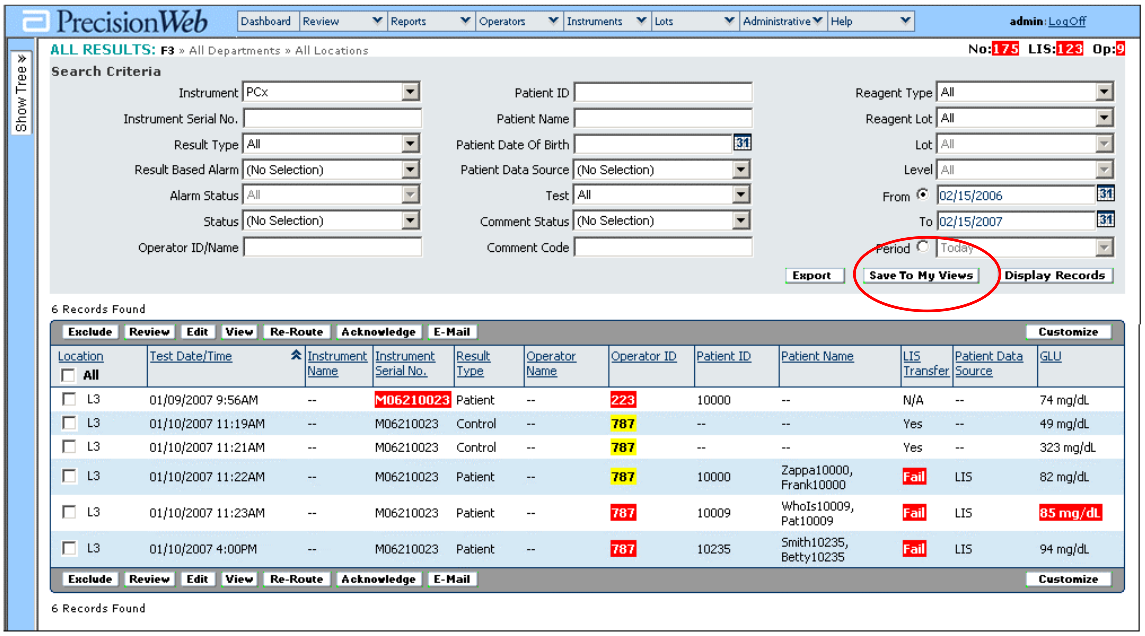
Warning Message

If you attempt to export a file that contains more than 256 columns or 65536 rows, then a dialog with the following message will appear:



- Click **OK** to continue the export.
- Click **Cancel** to close the dialog box and terminate the export.

To Save Current View



1. Click the **Save To My Views** button to save the table column configuration and search criteria. The date range filter and Location Tree selection will not be saved.

2. Enter a descriptive name in the View Name field of the pop-up.

3. Click **Save** to save as a view for display in the **My Views** section of the **Dashboard** screen, or Click the **Cancel** to return to the All Results screen without saving the view.

The Table displays the list of records that meet the Selection Criteria you have chosen.

Available Columns

The following columns will be available for display selection:

- Location
- Test Date/Time
- Instrument Name
- Instrument Serial Number
- Result Type

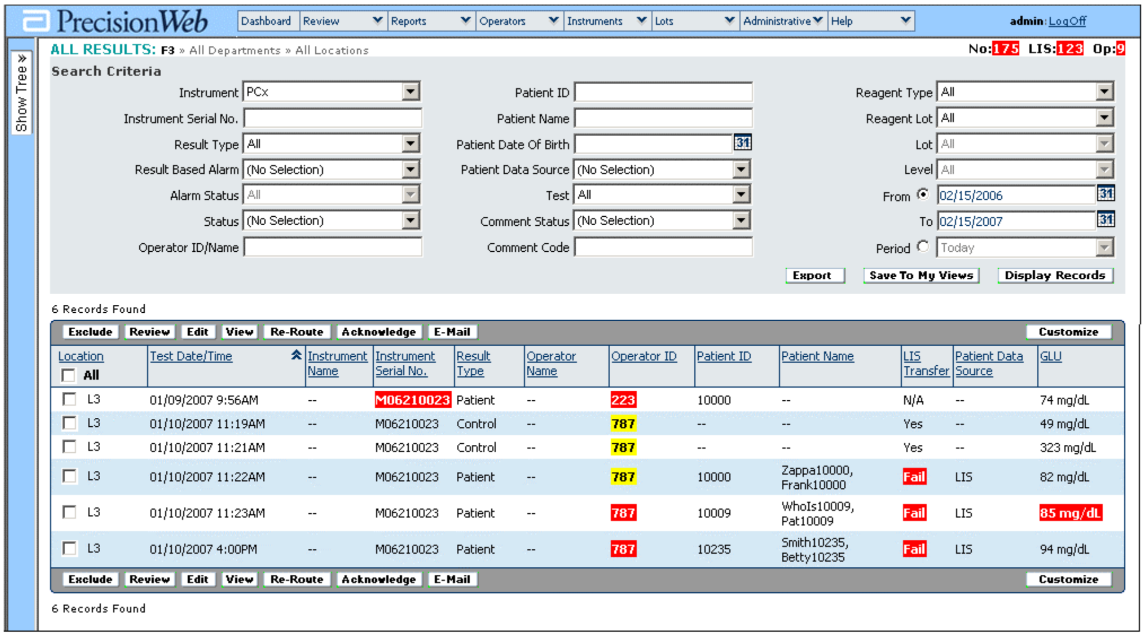
- Reviewed
- Review Comment
- Operator Name
- Operator ID
- Instrument Comment
- Patient ID
- Patient Name
- Patient Date of Birth
- Reagent Type
- Reagent Lot
- Lot
- Level
- Alarms
- Excluded
- LIS Transfer
- Patient Data Source
- Glucose
- EQC
- Simulator ID

All the columns are shown by default until you customize the table using the **Customize** button at the far right of the table's Action Bar.

Alarm Highlighting

Columns with an associated alarm will be highlighted according to alarm type.

- If a test has multiple alarms, multiple fields may be highlighted.
- A field will only be highlighted if you have selected the Alarm Type in the My Profile screen.
- The highlight will be white text on red background for unacknowledged alarms and black text on yellow background for acknowledged alarms.
- If a field caused both an acknowledged and an unacknowledged alarm, the unacknowledged alarm will take precedence and the field will be highlighted in red.



Action Bar

The Action Bar is displayed above and below the Table. The Action Bar includes the following Action buttons:

- **Exclude**
- **Review**
- **Edit**
- **View**
- **Re-Route**
- **Acknowledge**
- **E-Mail**

Exclude Results

Clicking this button allows you to exclude records from statistical reports.

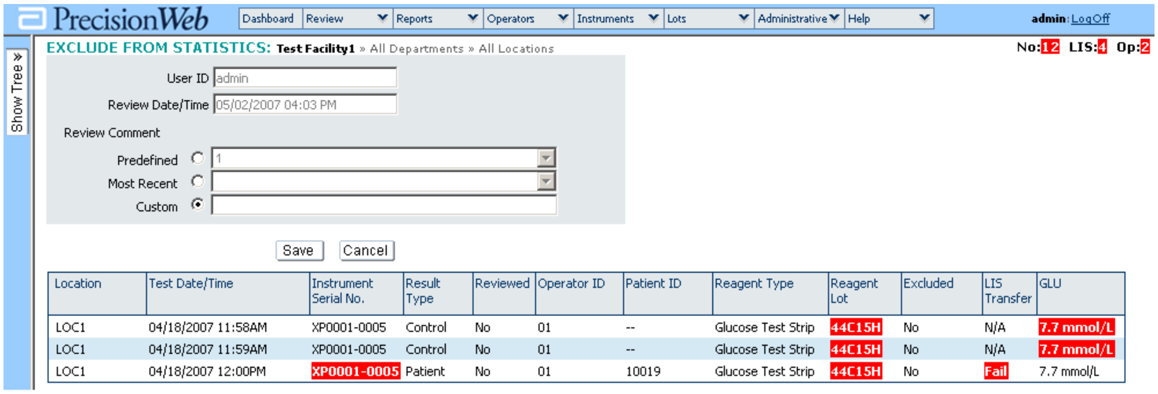
To **exclude** a single result record or multiple result records from statistical reports:

1. Select one or more records in the table by click on the box(es) in the Location column.
2. Click the **Exclude** action button.

To **exclude** all result records from statistics:

1. Click on the box marked **All** in the Location column header.
2. Click the **Exclude** action button.

The **Exclude From Statistics** screen displays the User ID and the Review Date/Time in read-only fields and allows you to change the predefined comment or add a custom comment to the records. Result records that are excluded from statistics will not appear on reports containing statistics.



Review Comment

Select from the following three choices:

Field	Description
Predefined	Select from a list of 10 predefined comments from the dropdown list. Predefined comments are entered in the **Facility Settings** screen; see Chapter 9, Administrative, Section Facility Settings. This selection disables the **Custom** and **Most Recent** comment fields.
Most Recent	Select a comment from the dropdown list. Up to 10 comments will appear in this list. The comments listed are those most recently entered in the **Custom** comment field, below. The most recently entered comment in the **Custom** comment field will appear as the default entry in the **Most Recent** comment field until changed. This selection disables the **Custom** and **Predefined** comment fields.
Custom	Enter a custom comment (up to 60 alphanumeric characters) in the entry field. This selection disables the **Predefined** and **Most Recent** comment fields. When a comment is entered it will be added to the **Most Recent** comment selection list upon saving. The list supports up to ten custom comments. If an eleventh comment is added, the first comment entered is removed from the selection list.

- Click the **Save** button to mark the selected records as excluded from statistics or Click the **Cancel** button to cancel the exclude action without saving.

Review Results

Clicking this button allows you to add a comment to one or more result records. Selected results will be marked as reviewed and stamped with your PrecisionWeb User ID (electronic signature) and date and time of result review.

To **review** a single result record or multiple result records:

1. Select one or more records in the table by click on the box(es) in the Location column.

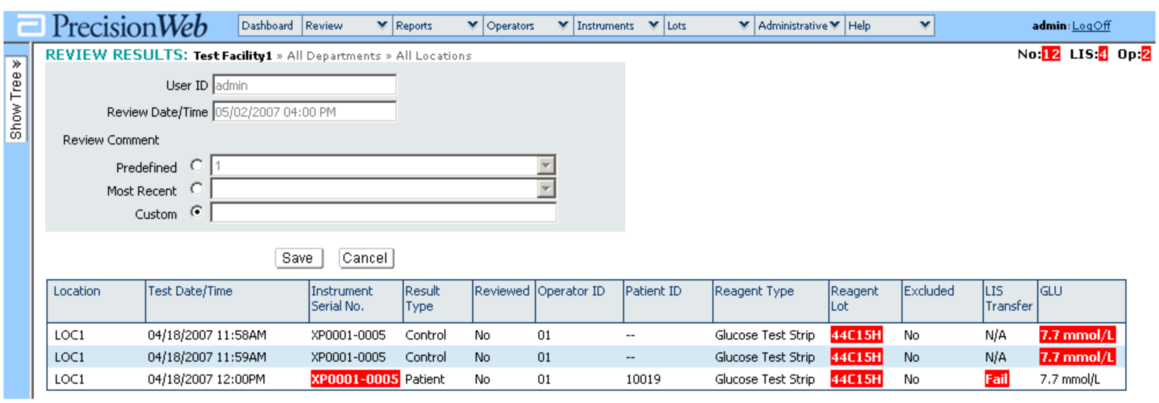
2. Click the **Review** action button.

To **review** all result records:

1. Click on the box marked **All** in the Location column header.

2. Click the **Review** action button.

The **Review Results** screen displays the User ID and Review Date/Time in read-only fields as well as the following fields that allow you to change the Review Comment or add a new comment to the records.



Review Comment

Select from the following three choices:

Field	Description
Predefined	Select from a list of 10 predefined comments from the dropdown list. Predefined comments are entered in the **Facility Settings** screen; see Chapter 9, Administrative, Section Facility Settings. This selection disables the **Custom** and **Most Recent** comment fields.
Most Recent	Select a comment from the dropdown list. Up to 10 comments will appear in this list.

Field	Description
	The comments listed are those most recently entered in the **Custom** comment field, below. The most recently entered comment in the **Custom** comment field will appear as the default entry in the **Most Recent** comment field until changed. This selection disables the **Custom** and **Predefined** comment fields.
Custom	Enter a comment (up to 60 alphanumeric characters) in the entry field. This selection disables the **Predefined** and **Most Recent** comment fields. When a comment is entered it will be added to the **Most Recent** comment selection list upon saving. The list supports up to ten custom comments. If an eleventh comment is added, the first comment entered is removed from the selection list.

- Click the **Save** button to mark the selected records as reviewed or Click the **Cancel** button to cancel the review action without saving.

Edit Results

Clicking this button allows you to edit data for one or more result records.

To **edit** a single result record or multiple result records:

1. Select one ore more records in the table by click on the box(es) in the Location column.

2. Click the **Edit** action button.

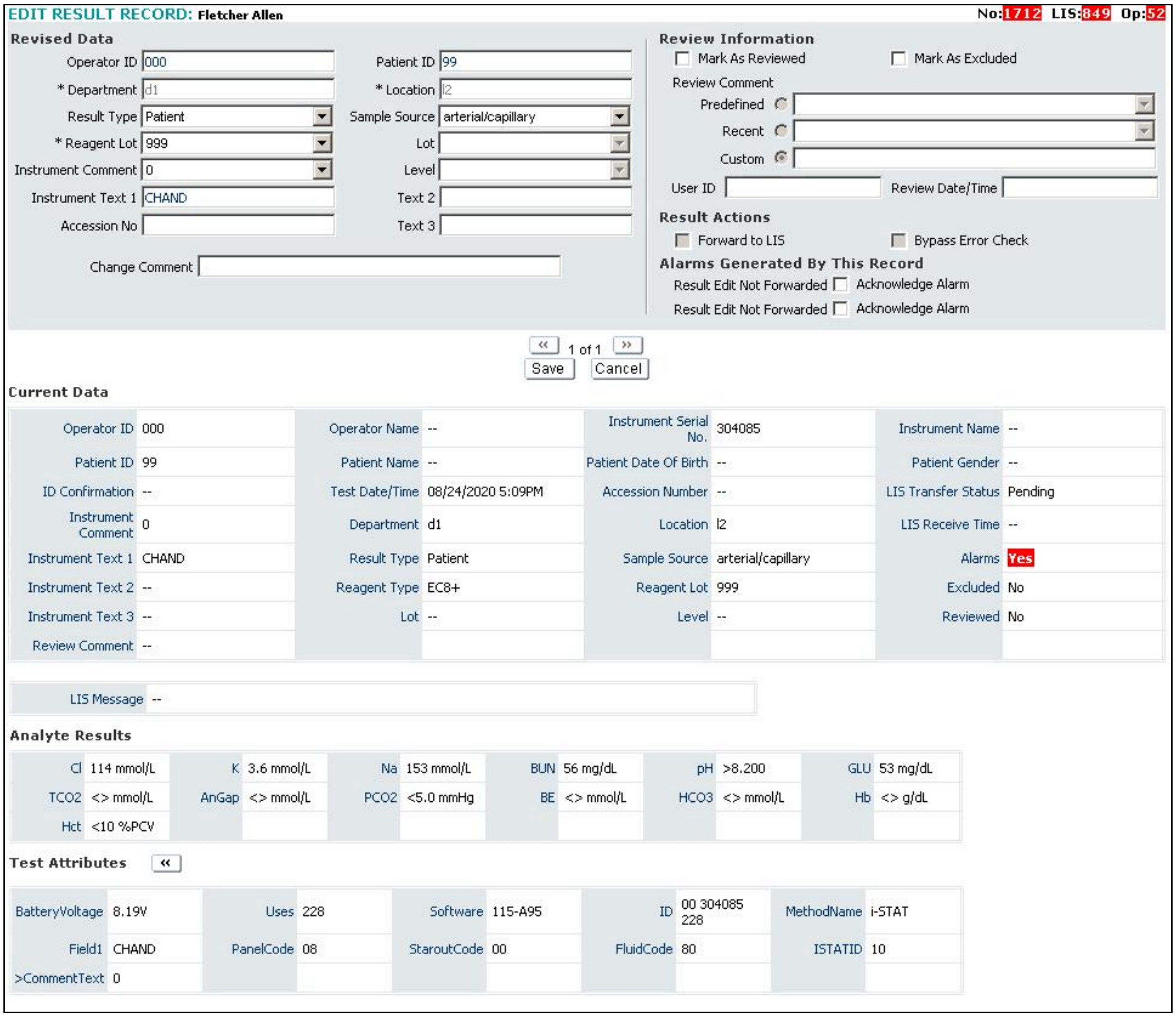
To **edit** all result records:

1. Click on the box marked **All** in the Location column header to select all records.

2. Click the **Edit** action button.

The **Edit Result Record** screen appears with the data of the first selected record to be edited.

If multiple records are selected each record is displayed on a separate page.



To view the selected result records, click on the » right arrow button to view the **next** record or click on the « left arrow button to view the **previous** record.

The screen is divided into three sections:

- **Revised Data** -- upper left corner of the screen
- **Review Information, Result Action** and **Alarms Generated By This Record** -- upper right corner
- **Current Data**, **Analyte Results** and **Test Attributes** -- bottom half of the screen

Revised Data

The following entry fields can be edited under the **Revised Data** section:

Field		Description
Operator ID		Enter the correct Operator ID number Entry field accepts up to a **maximum** of 30 characters.

> ***Note****: The updated Operator ID must be in the system or the following error will occur: Error 1150: Assigned operator missing from Operators table.*

Patient ID		Entry field accepts up to a **maximum** of 30 characters. Field is disabled if the record is not associated with a Patient test.
Department		Click on a **Department** in the Tree. The read-only field for Department automatically displays the selected Department.
Location		Click on a **Location** in the Tree. The read-only field for Location automatically displays the selected location.
Result type:	**Patient**	Enables the Patient ID, Reagent Lot and Sample Source fields for editing.
	Control	Enables the Lot, Level and Reagent Lot fields for editing.
	Electronic QC	Enables Reagent Lot.
	Linearity	Enables the Lot, Level and Reagent Lot fields for editing.
	Proficiency	Enables the Lot and Reagent Lot fields for editing.
Sample Source		Enabled only if "Patient" result record is selected. Select sample source from dropdown list.
Reagent Lot		Select reagent lot from the dropdown list.
Lot		Enabled only if Control, Proficiency or Linearity result record is selected from the dropdown list for the **Result Type field.** Select lot from the dropdown list. These lot numbers must be predefined in the Lots screens (control, linearity, etc.) See Chapter 8, Lots).
Instrument Comment		Select an instrument comment code from the dropdown list. 0 - 8 are predefined comments for PCx only; additional comments can be added in the Instrument Comment Codes screen.

Field	Description
Level	Enabled only if Control or Linearity result record is selected from the dropdown list for the **Result Type field.** Select Low, Normal or High for QC. Select level numbered L1 through L10 for Linearity.
Instrument Text 1, Text 2, Text 3	Displays the instrument freeform text field 1, 2 or 3 and allows entry. The value of any Instrument Test Attribute with the name "Field 1," "Field 2," "Field 3," respectively, will be displayed. If the instrument type does not support this attribute, the label and entry field will not be displayed.

***Note**: The **Edit Result** screen will not display the Instrument Text fields when **PCx** is selected from the Instrument field, as the PCx meter does not support free text entry.*

Accession No.	Displays the LIS/HIS Accession Number. This field can be edited.
Change Comment	Enter a comment related to the reason for editing the record. This comment will be forwarded to the LIS along with the entire record.

Review Information

The following entry fields can be edited under the **Review Information** section:

☐ Mark as Reviewed ☐ Mark as Excluded

Review Comment entry fields

Field	Description
Predefined	Select from a list of 10 predefined comments from the dropdown list. Predefined comments are entered in the **Facility Settings** screen; see Chapter 9, Section Facility Settings. This selection disables the **Custom** and **Recent** comment fields.
Recent	Select a predefined comment from the dropdown list. Up to 10 comments will appear in this list. The comments listed are the most recently entered in the **Custom** comment field, below. The most recently entered comment in the **Custom** comment field or pre-defined comment will appear as the default entry in the **Recent** comment field until changed. This selection disables the **Custom** and **Predefined** comment fields.
Custom	Enter a comment (up to 60 alphanumeric characters) in the entry field. This selection disables the **Predefined** and **Recent** comment fields. When a comment is entered it will be added to the **Recent** comment selection list upon saving. The list supports up to ten custom comments. If an eleventh comment is added, the first comment entered is removed from the selection list.
User ID	Your user ID is automatically inserted in this field. This field cannot be modified.
Review Date/Time	The date and time you are editing the data is automatically inserted in this field. This field cannot be modified.

Result Actions

The following entry fields can be edited under the **Result Actions** section:

☐ Forward to LIS ☐ Bypass Error Check

- Bypass Error Check overwrites the interface's upfront error check (if enabled). Enabling the Bypass Error Check setting will forward result record to the LIS/HIS even if the result contains an error that would otherwise fail the defined interface error check.
- Select the Forward to LIS box to resend the result record to the LIS/HIS.

- If a result record has been change, but the **Forward to LIS** box remains unchecked upon saving the record, a "Result Edit Not Forwarded" alarm will be generated.
- The "Result Edit Not Forwarded" alarm will be displayed in the **Dashboard** under the LIS/Test category. Selecting the alarm will display the **All Results** screen showing the Result Edit Alarms.

Notes:

- *If you have selected the **Forward to LIS** box, the **Change Comment** field and **Bypass Error Check** flag you have specified will be forwarded to the LIS/HIS except in QCM2.x forwarding mode.*
- *The **Bypass Error Check** box is disabled if **Forward to LIS** is not checked. The box is also disabled if the LIS forwarding status is "Pending" or "N/A."*

Alarms Generated By This Record

This section displays all Alarm Types associated with the result you are currently editing.

If the **Edit Result** screen you are viewing is displayed coming from the **All Results** screen with a specific Alarm Type filter, the corresponding Alarm Type will be checked by default.

- Unacknowledged alarms display a selectable checkbox.
- Acknowledged alarms display a grayed and checked checkbox.
- Selected alarms will be acknowledged upon saving the record.

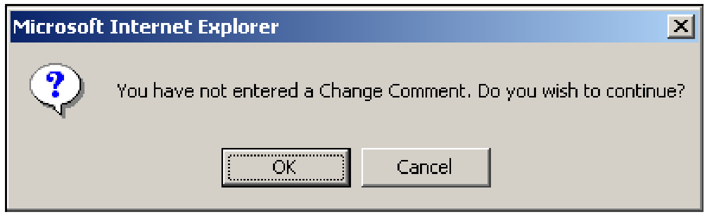
Page Counter

The « left arrow button allows you to move to previous records; the » right arrow button allows you to move to subsequent records. The position of the record you are viewing is displayed in relation to other records found that fit the Selection Criteria, for example "2 of 32," is displayed between the « left arrow and » right arrow symbols.

- Click the **Save** button to save the edited record. The next selected record is then displayed or Click the **Cancel** button to cancel the edit action without saving.

Warning Message

If you click the **Save** button without entering a comment in the Change Comment field, the following Warning Message is displayed:



- Click **OK** if you want to go on to the next record without adding a comment, or
- Click **Cancel** if you would like to add a comment to the Change Comment field.

Current Data Table

The **Current Data** table shows the current data you are editing in the Revised Data section of the Edit Result Record screen.

The current data is in read-only fields.

When an edit is made to the Patient ID field in the Revised Data section, the Patient Data Source field will be set to "QCM." The Patient ID associated with the test result will be updated.

The data displayed in the Patient ID, Patient Name, Patient Date of Birth, Patient Gender, and Patient Data Source fields will be read from Admission, Discharge, and Transfer data associated with the test result.

Field text related to alarms will be highlighted with white letters on red background for unacknowledged alarms and black text on yellow background for acknowledged alarms.

Analyte Results

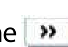
Analyte result values are displayed below the **Current Data** table.

Only Analytes for the Reagent Type will be displayed.

Analyte result values that caused an **Out-of-Range** alarm will be displayed highlighted with white text on red background in the Analyte value field.

> ***Note**: All analyte values, except for Glucose (GLU), will be displayed only in the **Edit Results, View Result Details** and **Patient Results** screens.*

Test Attributes

The read-only Instrument **Test Attributes** table is only displayed by clicking the  button. The Test Attributes table appears only for some instruments, including i-STAT and i-STAT Strip. Various lists of Test Attributes will be shown, depending on the instrument type and the particular test type.

When the attributes are displayed, the button reads: 

Clicking the button will hide the **Test Attributes** table and re-display the  button.

Attributes that may be displayed in this table include:

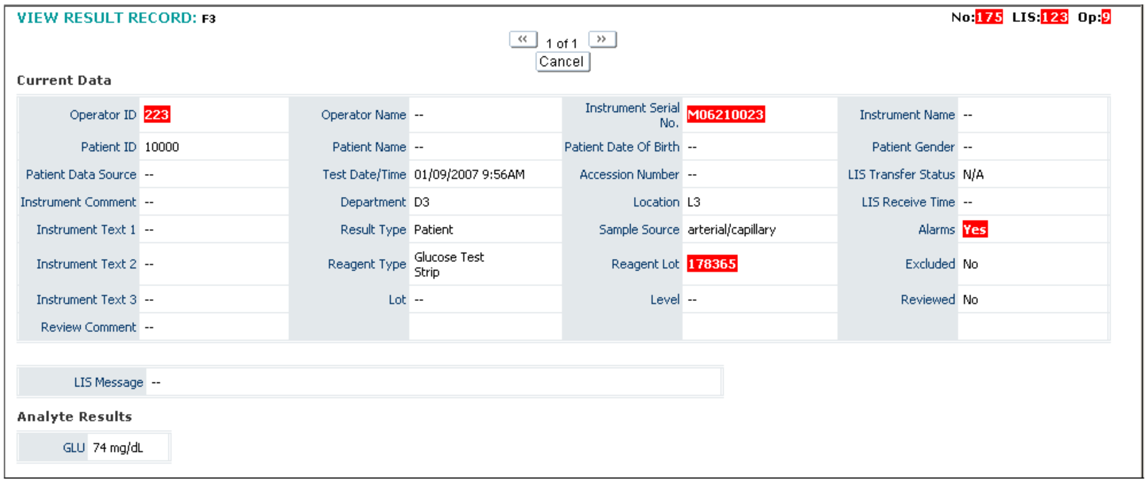
SimulatorID	Temperature	POT0P
Pressure	CommentText	POT0N
ProbeDelta	Run	POT0Z
CPBApplied	MethodName	POT1P
FIO2	ID	POT1N
Low Range	ActLo	POT1Z
High Range	ActHi	POT2P
Field1	RefLo	POT2N
Field2	RefHi	POT2Z
Field3	AMP0Z	POT3P
PanelCode	AMP1P	POT3N
StaroutCode	AMP1N	POT3Z
FluidCode	AMP1Z	POT4P
ISTATID	AMP2P	POT4N
PreferencesName	AMP2N	POT4Z
PreferencesVersion	AMP2Z	POT5P
Uses	OriginalTestType	POT5N
Software	RHI	POT5Z
PanelCode	RLO	POT6P
BatteryVoltage	Sample Source	POT6N
	CpItem2	POT6Z
	CpItem3	AMP0P
	CpItem4	AMP0N
	CpSampleType	
	CpPtTemp	
	CpItem6	
	CpCPB	
	CpItem9 through CpItem54	

View Results

Clicking this button displays the **View Results Record** screen, which shows detailed current data for the record(s) chosen. Result records cannot be modified from View Results screen.

The following aspects of the screen are the same as Current Data table in the **Edit Result** screen:

- **Forward** and **Backward** page navigation buttons
- **Cancel** button
- **Current Data** table
- **Analyte Results** table
- **Test Attributes** table



Re-Route Result Data

Clicking this button allows you to acknowledge and forward selected results to the LIS/HIS.

In order to activate the Re-Route action you must choose an alarm type from the **Result-Based Alarm** dropdown list in the Selection Criteria.

A number of **dialogue boxe**s are triggered when using the **Re-Route** action:

If you choose "All" from the Result-Based Alarm list, the following message will be displayed:

- Click **OK** to acknowledge all the alarms for the selected results. Only result-based alarms are acknowledged. Click **Cancel** to return to the All Results screen.

Once you have chosen an alarm type from the Result-based Alarm dropdown list, and clicked on the **Re-Route** button, the following message will be displayed:

- Click **OK** to continue or **Cancel** to return to the All Results screen.

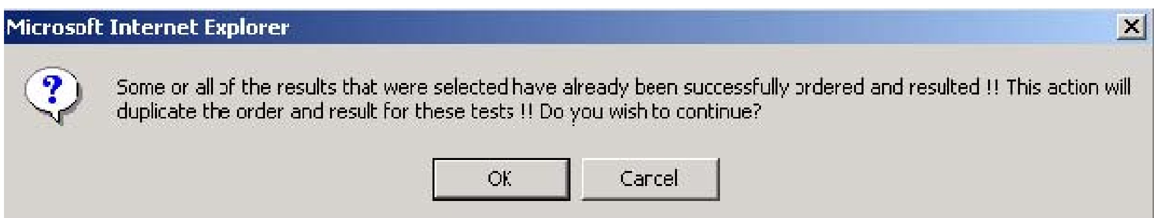
Similar checks as in the **Edit Result** screen will be performed before forwarding a result to the LIS:

- The facility must be configured to forward results to the LIS.
- Tests with an LIS transfer status of "Pending" cannot be forwarded to the LIS.
- A result type must be configured for the facility to be forwarded to the LIS (Patient and/or QC tests only).
- The test date/time must be greater than the LIS Start Forwarding date for the facility.

If any of these (above) conditions fail, a dialogue box will inform you of the error and ask whether to continue:

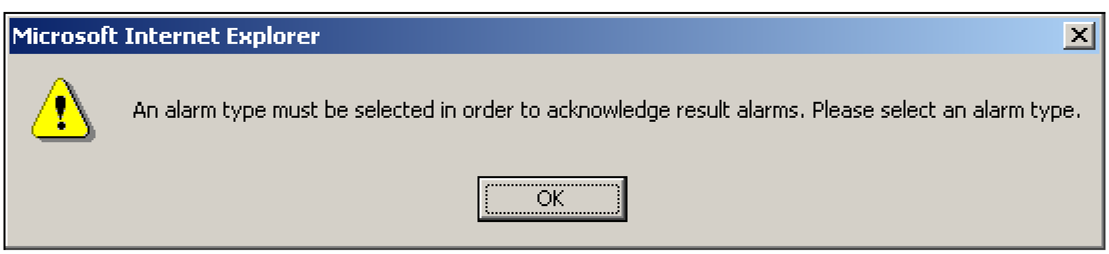
- If you click OK and continue, only the results that pass the check will be forwarded, and all the alarms will be acknowledged.

If you forward one or more results to the LIS that have already been successfully forwarded, an additional dialogue box is displayed to warn the user.



- Click **OK** to continue or **Cancel** to return to the All Results screen.

If you have not selected an alarm type from the Result-Based Alarm field, the following warning message is displayed:



- Click **OK** and make a selection from the Result-Based Alarm dropdown list.

> ***Note:*** *The Re-Route button will be displayed only for users with Edit Results and Forward to LIS permissions.*

Acknowledge Results

Clicking this button allows you to acknowledge alarms connected with the selected results of the displayed Alarms Selection Criteria.

In order to activate the **Acknowledge** action you must choose an alarm type from the **Result-Based Alarm** dropdown list in the Selection Criteria.

A number of dialogue boxes are triggered when using the **Acknowledge** action:

If you choose "All" from the Result-Based Alarm list, the following message will be displayed:

- Click **OK** to acknowledge all the alarms for the selected results (including result-based and non-result-based alarm categories).
- Click **Cancel** to return to the All Results screen.

Once you have chosen an alarm type from the Result-based Alarm dropdown list and clicked on the **Acknowledge** button, the following message will be displayed:

- Click **OK** to proceed.
- Click **Cancel** to return to the All Results screen.

If **(No Selection)** is selected from the Result-Based Alarm list, the following warning message is displayed:

- Click **OK** and select an alarm type.

When you click the **Acknowledge** button, any alarms of the selected results that are of the Alarm Type selected in the Alarms search criteria will be acknowledged.

- For example, if the Invalid Operator alarm is selected, three results are selected and you click on the **Acknowledge** button, only the three Invalid Operator Alarms for the three results will be acknowledged. Any additional alarms that any of the three results may have will not be acknowledged.

After acknowledging results, the screen will be refreshed to reflect the acknowledged alarms by changing the field text in affected columns from white text on red background to black text on yellow background.

Note:

- *The **Acknowledge** button will be displayed only for users with Edit Results permissions.*
- *Only previously unacknowledged alarms and alarms within the permission scope of the user will be acknowledged.*

E-Mail Results

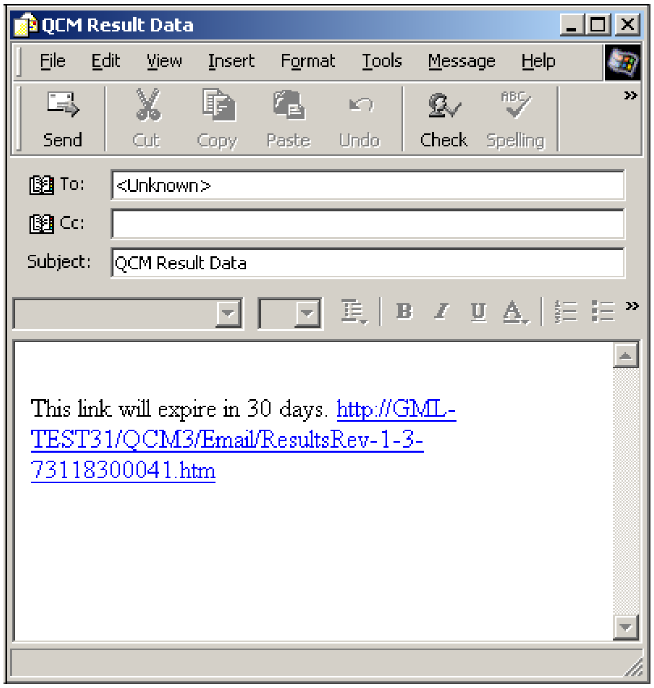
To **e-mail** a single result record or multiple result records:

1. Select one ore more records in the table by click on the box(es) in the Location column.
2. Click the **E-Mail** action button.

To **e-mail** all result records:

1. Click on the box marked **All** in the Location column header.
2. Click the **E-Mail** action button.

- The default e-mail opens a new mail message and includes the menu option title in the subject field.
- The body of the message includes a hyperlink to an .htm file that contains the selected records.
- The e-mailed result table will include the result details for each result in a table format.
- The e-mailed screen will be the **View Result Record** screen.


QCM Result Data
File Edit View Insert Format Tools Message Help
Send Cut Copy Paste Undo Check Spelling
To: <Unknown>
Cc:
Subject: QCM Result Data
This link will expire in 30 days. http://GML-TEST31/QCM3/Email/ResultsRev-1-3-73118300041.htm

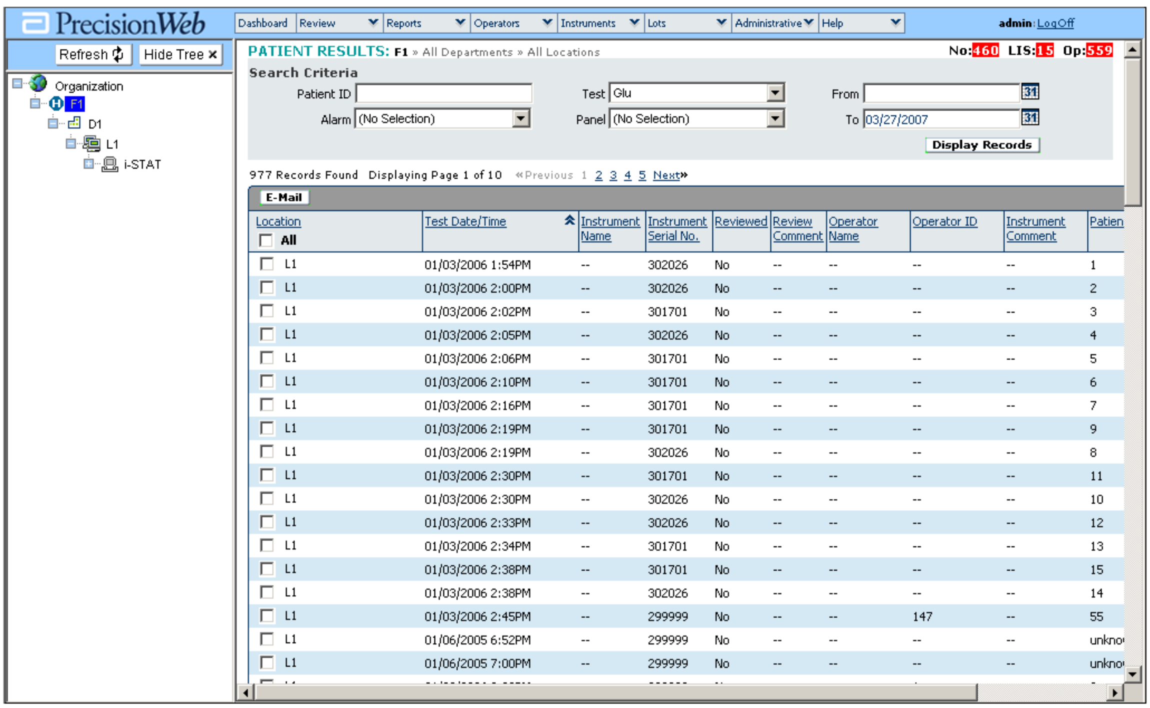
Patient Results Screen

Review>>Patient Results

The **Patient Results** screen allows you to view and e-mail patient test results and to view test panel information for multi analyte instruments.

To **view** patient results records:

1. Move the mouse cursor over **Review** to display the menu options.
2. Click on the **Patient Results** option.



- The **From** and **To** date fields are filled in by default with today's date. To display records you must first set the **From** Date.
- The **Patient Results** screen displays the Table based on the location highlighted in the Location Tree and the system default Search Criteria.
- To display patient results records from a *different* location using the same search criteria, click on a **Facility**, **Department** or **Location** in the Location Tree.
- Use the Search Criteria options to display specific result records.

Search Criteria

To **find** a specific patient results record:

1. Enter a **Patient ID** in the entry field.
2. Click the **Display Records** button.
   - Results that match or are similar to the entered Patient ID will be displayed.

To **filter** the patient records displayed:

1. Select from the **Search Criteria** dropdown list available.
2. Click the **Display Records** button.

Available filter options:

Filter	Options	Description
Panel	**No Selection**	
	Selected	System displays results based on the panel created from the Administrative >> Panels screen.
Test	**All**	
	GLU	System only displays glucose test results.
	Selected	System displays results with selected Test Type.
Alarm	**No Selection**	System displays results with and without associated alarms.
	All	System only displays results with associated alarms.
	Selected	System only displays results with the selected alarm type.
Date Range		System default displays today's date. Enter or select a **From** and a **To** date to display test results records from tests that were performed between the selected dates.
	From	Click on the calendar icon to display the pop-up calendar and click on a date. The **From** date field automatically displays the selected date.
	To	Click on the calendar icon to display the pop-up calendar and click on a date – ***required.*** The **To** date field automatically displays the selected date.

Click the **Display Records** button to display the results based on the selected Search Criteria options.

E-Mail Patient Result Records

To **e-mail** a single patient result record or multiple patient result records:

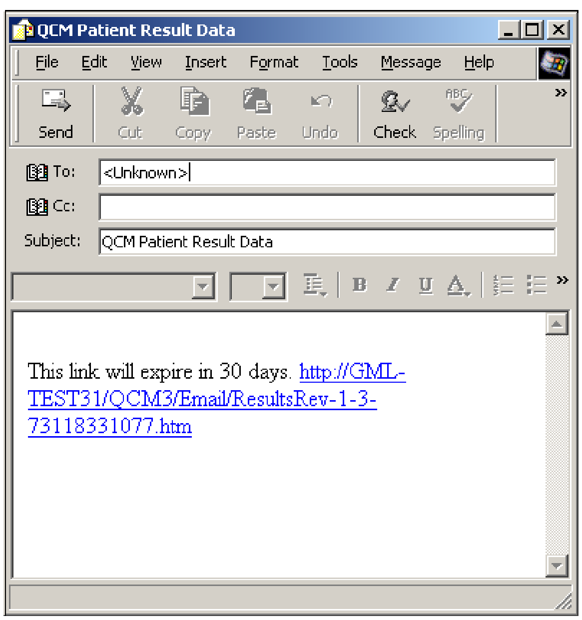
1. Select one or more records in the table by click on the box(es) in the Location column.
2. Click the **E-Mail** action button.

To **e-mail** all patient result records:

1. Click on the box marked **All** in the Location column header.
2. Click the **E-Mail** action button.

The default e-mail client opens a new mail message and includes the menu option title in the subject field.

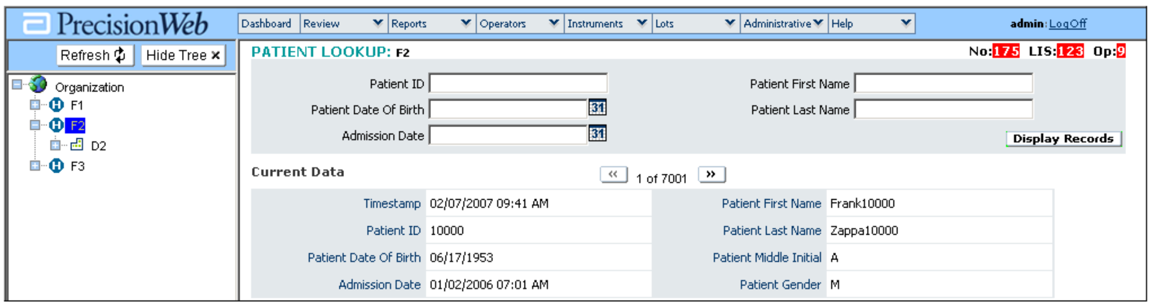
The body of the message includes a hyperlink to an .htm file that contains the selected records. Linked files will expire after 30 days.



Patient Lookup

Review>> Patient Lookup

The **Patient Lookup** screen allows you to retrieve current patient data for any Facility in your organization. By default, existing users are not granted access to the Patient Lookup screen. To obtain access to this screen refer to Menu Permissions in Chapter 9.



To **view** this screen:

1. Move the mouse cursor over **Review** in the Menu Bar to display the menu options.

2. Click on the **Patient Lookup** option.

3. Fill in the desired information. You may look up specific records by using any of the following search criteria:

   - Patient ID
   - Patient Date of Birth
   - Patient First Name
   - Patient Last Name
   - Admission Date

4. Click **Display Records.** The **Current Data** table displays the data for the patient(s) you have selected. Patient Records will be retrieved for the selected Facility in the Location Tree. The **Timestamp** field displays the time the data was last updated in the LIS/HIS.

Note: *The Organization, Department, and Location nodes in the Tree are disabled in this screen.*

The « left arrow button allows you to move to previous records; the » right arrow button allows you to move to subsequent records. The position of the record you are viewing is displayed in relation to other records found that fit the Selection Criteria, for example "1 of 9" is displayed between the « left arrow and » right arrow symbols. To limit the number of patient records recalled, use specific criteria to narrow the search.

5. Reports

Reports Overview

The **Reports** menu option provides access to formatted reports suitable for archiving on paper or online. There are three screens available. The **View** screen allows you to edit, view, save or e-mail a report or suite of reports. The **Suites** screen allows you to add, edit or delete suites of reports that can then be managed as a group. The **Import** screen allows you to add customized reports to the system. Each screen is available only if your account was granted this permission by the Administrator or POCC.

There are 23 standard report types, grouped into 2 suites:

QCM3 Default Reports

1. Audit Trail Log
2. Comment Code Log
3. Control Data Statistics by Instrument
4. Control Data Statistics by Reagent Lot
5. Data Listing
6. Glucose Meter Nurse Manager Report
7. Glucose Meter QI Representative Report

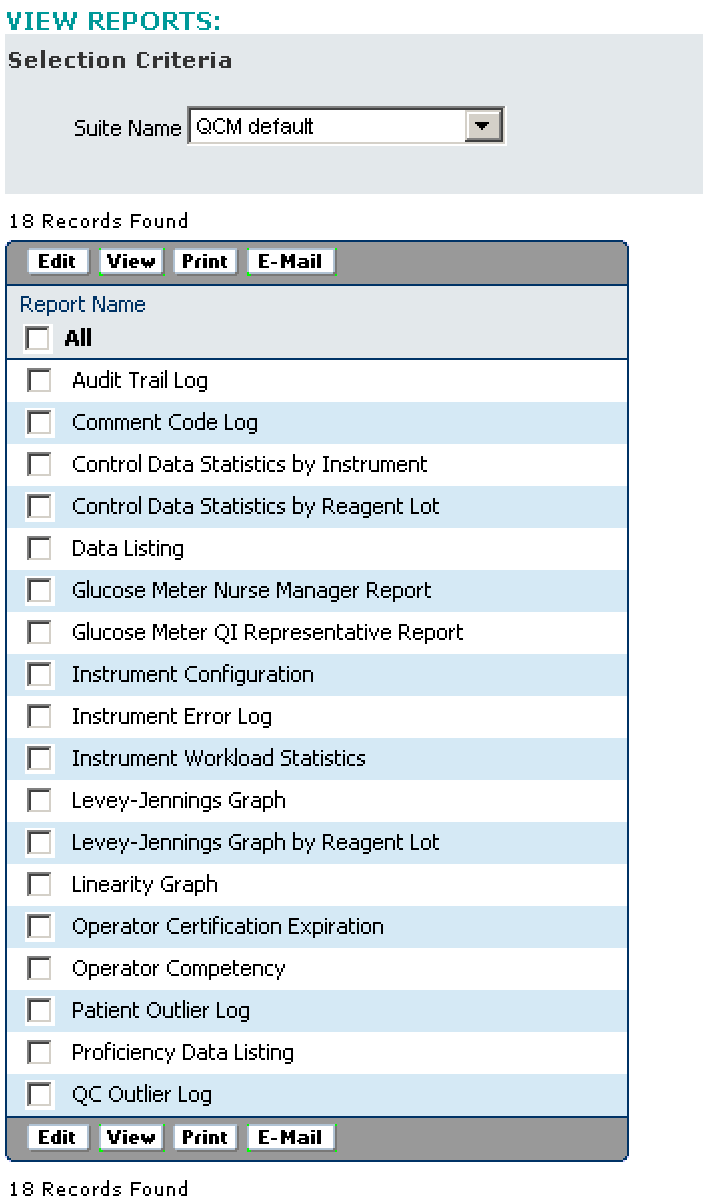
Note: *Glucose meter reports are specific to Abbott glucose monitors only and do not report data for other instrument types.*

8. Instrument Configuration
9. Instrument Error Log
10. Instrument Workload Statistics
11. Levey-Jennings Graph
12. Levey-Jennings Graph by Reagent Lot
13. Linearity Graph
14. Operator Certification Expiration
15. Operator Competency
16. Patient Outlier Log
17. Proficiency Data Listing
18. QC Outlier Log

i-STAT Default Reports (Reports are specific i-STAT instrument types only)

19. i-STAT Data Listing
20. i-STAT Instrument Event
21. Quality Check Codes
22. Quality Check Codes by Operator
23. Reagent Usage

Each report in the Default Suites can be edited and saved into customized Report Suites to create batched reports that meet the needs of your facility.



View Reports Screen

View>>Reports

The **View Reports** screen allows you to view available report suites and to select reports for editing, viewing, printing and e-mailing.

To **view** a report suite:

1. Move the mouse cursor over **Reports** in the Menu Bar to display the menu options.

2. Click on the **View** option.

   Your location in the Tree is irrelevant at this time as you will select a Tree location once a report has been selected from a Suite.

3. Select a suite name from the dropdown list in the **Suite Name** field of the **Selection Criteria**.

   The default suites are QCM3 default and i-STAT default.

The reports associated with the **Suite Name** you have chosen in the Selection Criteria are displayed in the Table on the bottom half of the screen.

There are five available action buttons in the **Action Bar** above the list of reports: **Edit, View, Delete** (not available for default reports), **Print** and **E-mail**.

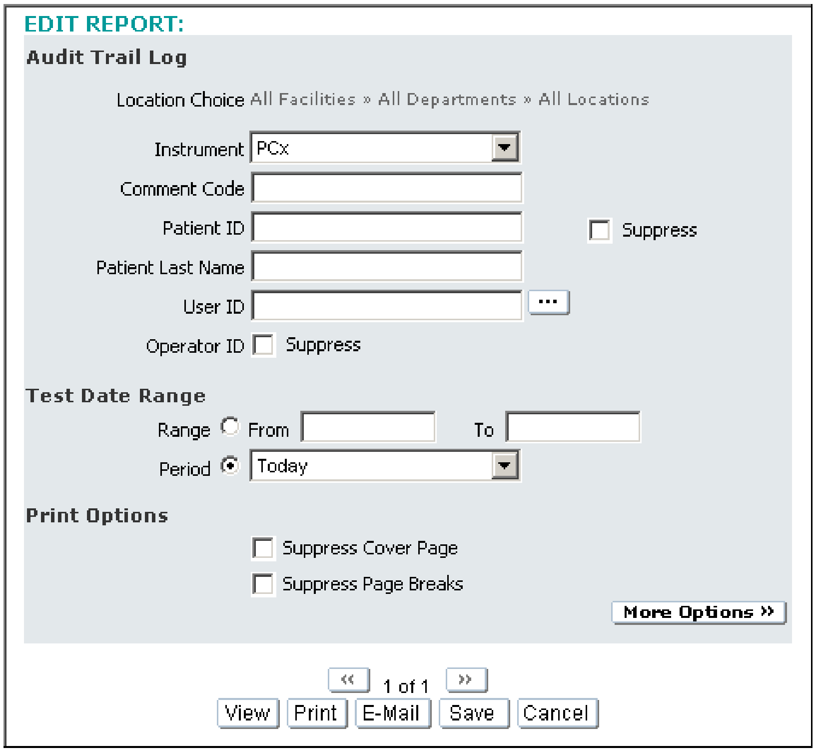
Edit a Report

To **edit** a single report or multiple reports in a suite:

1. Click the box(es) to the left of the Report Name.
2. Click the **Edit** action button.

To **edit** all reports in a suite:

1. Click the box marked **All** in the Report Name column header.
2. Click the **Edit** action button.



The **Edit Report** screen allows you to customize and save reports that include:

- The Organization, Facility, Department or Location specific data.
- The selected filter options, date range options and print options.
- The selected database (Live or Archive) as the source for the report.
- The sort option for the report.

The next time the saved report is viewed or printed, the application automatically updates the information with the current data from the database eliminating the need to re-create the report.

If a user-defined date range is selected for the saved report, you can edit the date range before viewing, printing or e-mailing the report.

On reports that include the Operator ID / Operator Name and/or the Patient ID / Patient Name, , the application provides the options to include or exclude the ID and Name from the report. This option is available for security reasons.

See Section Default Reports below for more information on selecting filter options in the **Edit Report** screen.

View a report

To **view** a single report or multiple reports in a suite:

1. Click the box(es) to the left of the Report Name in the **View Reports** screen and click the **View** action button, or

2. Click the **View** action button on the **Edit Report** screen to view that specific report.

Print a Report

To **print** a single report or multiple reports in a suite:

1. Click the box(es) to the left of the Report Name in the **View Reports** screen and click the **Print** action button, or

2. Click the **Print** action button on the **Edit Report** screen to print that specific report.

To **print** all reports in a suite:

1. Click the box marked **All** in the Report Name column header.

2. Click the **Print** action button.

E-Mail a Report

To **e-mail** a link to a single report or multiple reports:

1. Click the box(es) to the left of the Report Name in the **View Reports** screen and click the **E-Mail** action button, or

2. Click the **E-Mail** action button on the **Edit Report** screen to e-mail a link to the specific report.

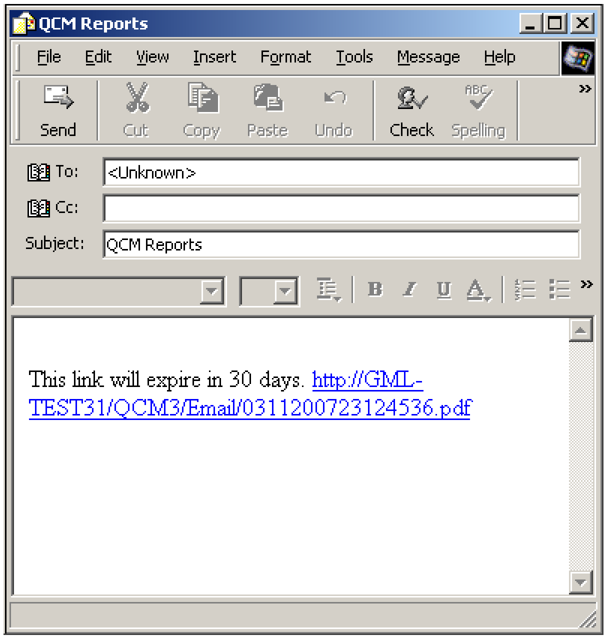
To **e-mail** links to all reports in a suite:

1. Click the box marked **All** in the Report Name column header.

2. Click the **E-Mail** action button.

    - The default e-mail client opens a new mail message and includes the menu option title in the subject field. The body of the message includes a hyperlink to a PDF file that contains the selected report.

    - Linked report files will be deleted after 30 days or if a maximum directory size specified on the registry has been reached. The default directory size is 200MB.


QCM Reports
File Edit View Insert Format Tools Message Help
Send Cut Copy Paste Undo Check Spelling
To: <Unknown>
Cc:
Subject: QCM Reports
This link will expire in 30 days. http://GML-TEST31/QCM3/Email/0311200723124536.pdf

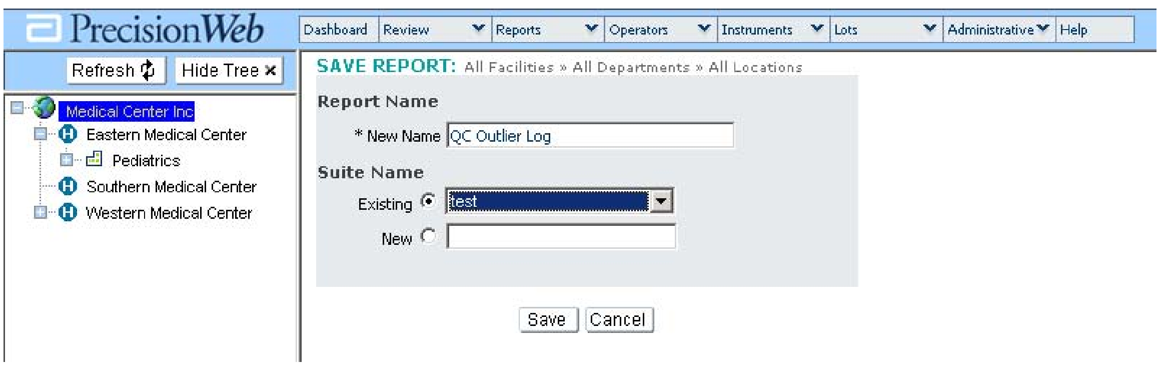
Save a Report

Click the **Save action** button to save the selected filter choices and sort options for the report.

> ***Note:*** *A default report cannot be edited and saved to a default suite. An edited report with the same name as a default report can be saved under a new customized suite name.*

The **Save Report** screen displays the current Report Name in the **New Name** entry field.

- To save the report with a different name, enter a Report Name in the **New Name** entry field.
- To save the report to an existing customized suite, click on the **Existing** button and select a Suite Name from the dropdown options.
- To save the report to a new customized suite, click the **New** button and enter a New Suite Name.



The next time the saved report is viewed or printed, the application automatically updates the information with the current data from the database eliminating the need to re-create the report.

* The New Name is a ***required*** entry field.

> ***Note:*** *If a user-defined date range is selected for the saved report, edit the report to update the date range before viewing or printing the report.*

Report Import Screen

Reports>>Import

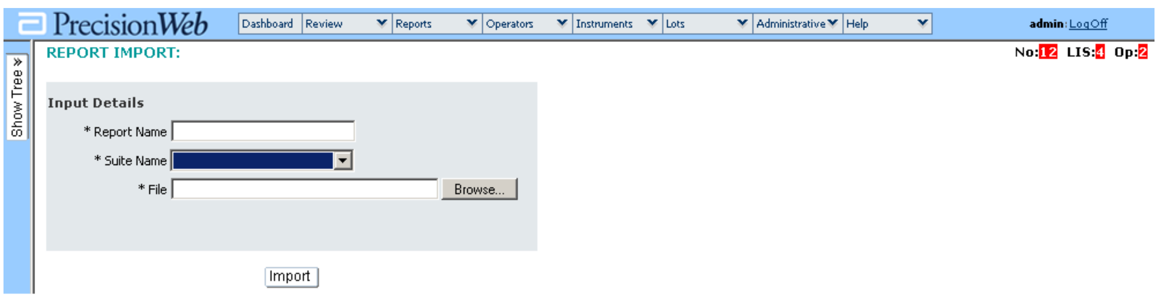
The Report Import Screen allows you to import reports from other files on your system.

To **import** a report:

1. In the Import Details box enter the **Report Name**.
2. Select a **Suite Name** from the dropdown list of available suites.

> ***Note:*** *Default suites are not available from the suite name dropdown list. To import a report, you must select from an existing suite or create a new suite prior to attempting the import.*

3. Select the **File** location of the report file by clicking on the **Browse** button.
   - All three fields are ***required*** fields.
4. Click the **Import** button.



The imported report will now be available in the **View Report** screen under the suite name you selected during the importing process.

Reports

The filter options for all 23 default reports are listed in the following pages.

See Section Edit a Report above for additional information on editing the reports.

To **edit** a single report or multiple reports in a suite:

1. Click the box(es) to the left of the Report Name.
2. Click the **Edit** action button.

To **edit** all reports in a suite:

1. Click the box marked **All** in the Report Name column header.
2. Click the **Edit** action button.

Once in the **Edit Report** screen:

1. Click on a **Facility**, **Department** or **Location** in the Tree to customize the report for specific location.
2. Select the filter options available on the **Edit Report** screen for the report you have chosen to edit.
3. After customizing the report, click on the **View**, **Print**, **E-Mail**, **Save** or **Cancel** action buttons. See sections View a report, Print a Report, E-Mail a Report and Save a Report above for more information on these actions.

Notes on common filter options

All reports except for **Instrument Configuration** and **Operator Certification Expiration** have the same **Test Date Range**, **Print Options** and **Additional Criteria** filter options as listed below:

> ***Note****: Instrument Configuration has* ***no*** *Test Date Range and Operator Certification Expiration has* ***Expiration Date Range*** *instead of Test Date Range, which will be explained below in Section Operator Certification Expiration Report.*

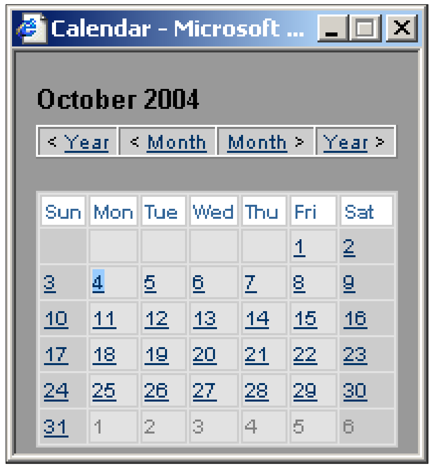
Test Date Range

Range button

Click on the **Range** button to display the calendar icon in the **From** and **To** entry fields (this option disables the **Period** button).

- The **From** and **To** date fields automatically display today's date unless changed.
- To change the date range:

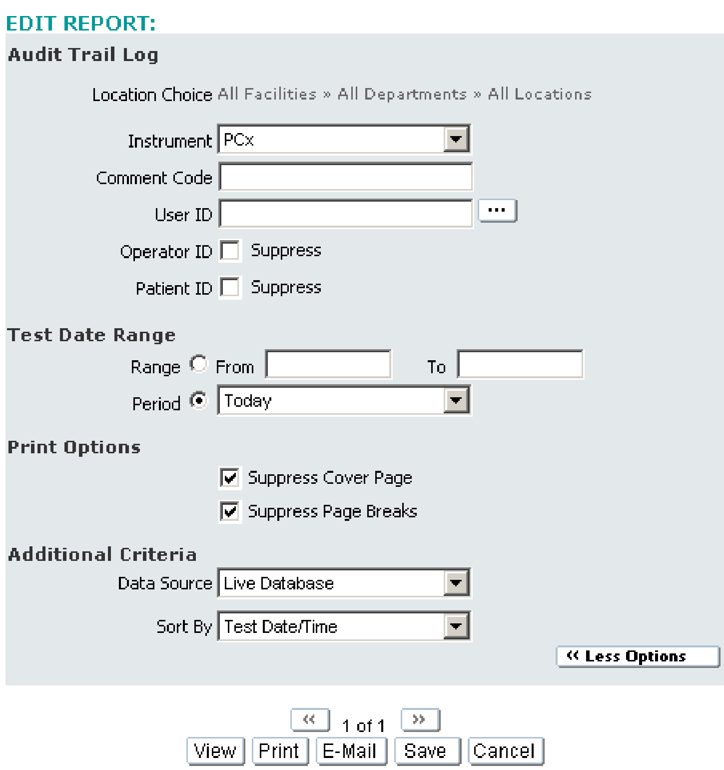
- Click on the calendar icon next to the **From** field to display the pop-up calendar and select an appropriate date.
- Click on the calendar icon next to the **To** field to display the pop-up calendar and select an appropriate date.



Period button

- Click on the **Period** button and select a period from the dropdown list.

This option disables the **Range** button



Print Options

Click on the checkboxes to exclude the cover page and/or the page breaks in the printed report.

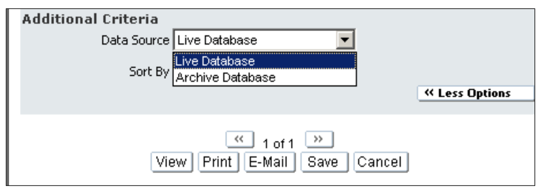
☐ **Suppress Cover Page**

☐ **Suppress Page Breaks**

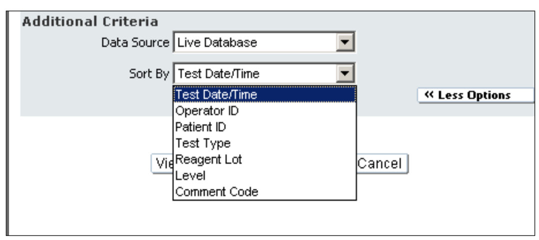
Additional Criteria

Click the **More Options >>** button to display two **Additional Criteria** fields: **Data Source** and **Sort By**.

Data Source Select the Live or Archive Database



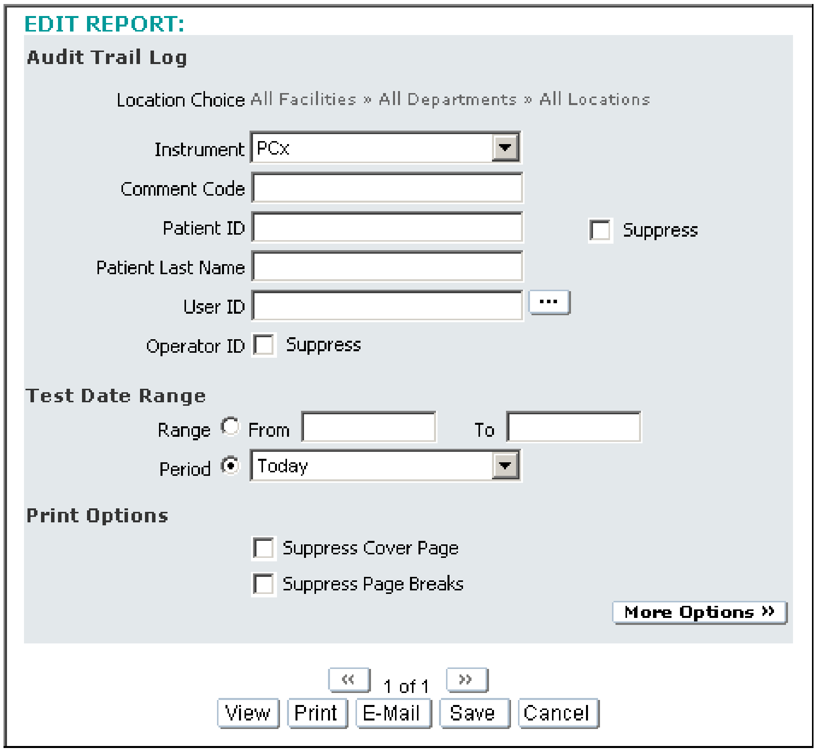
Sort By Select option from the dropdown list



Click the **<< Less Options** button to remove the Additional Criteria fields.

Audit Trail Log

The Audit Trail Log provides a tabular display of all changes made to test result record(s).



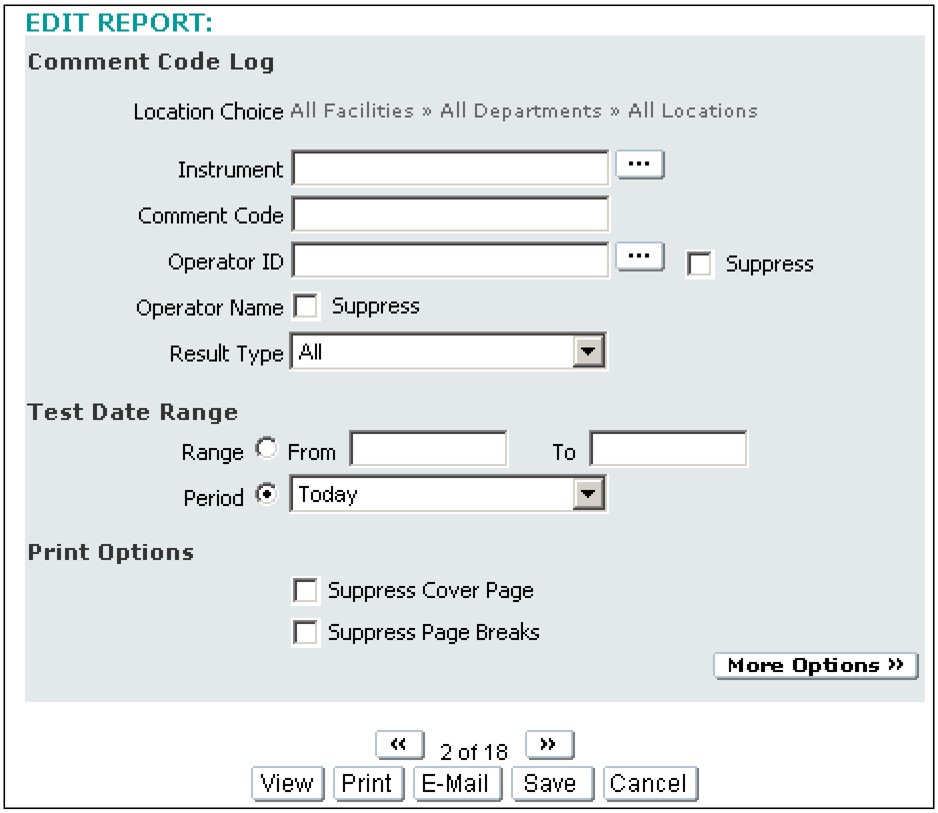
Select a Facility Department or Location in the Tree.

Select the filter options for the report:

Options	Description
Instrument	Select an instrument type from the dropdown list.
Comment Code	Enter a comment code (only one comment code can be entered per report).
Patient ID	Enter a Patient ID.
Patient Name	Enter a Patient Name, filtered by last name.
User ID	Click on the  button to display the pop-up browser window with the **User ID Lookup** list. Select a user and click on the **OK** button in the browser window; click the **Cancel** button to return to **Edit Report** screen. You can also directly enter a User ID into the field.
Operator ID	Click the **Suppress** checkbox to exclude the Operator ID from the printed report.
Patient ID	Click the **Suppress** checkbox to exclude the Patient ID from the printed report.

Comment Code Log

The Comment Code Log provides a tabular display of all test results for an instrument type tagged with a comment code.



Select a Facility Department or Location in the Tree.

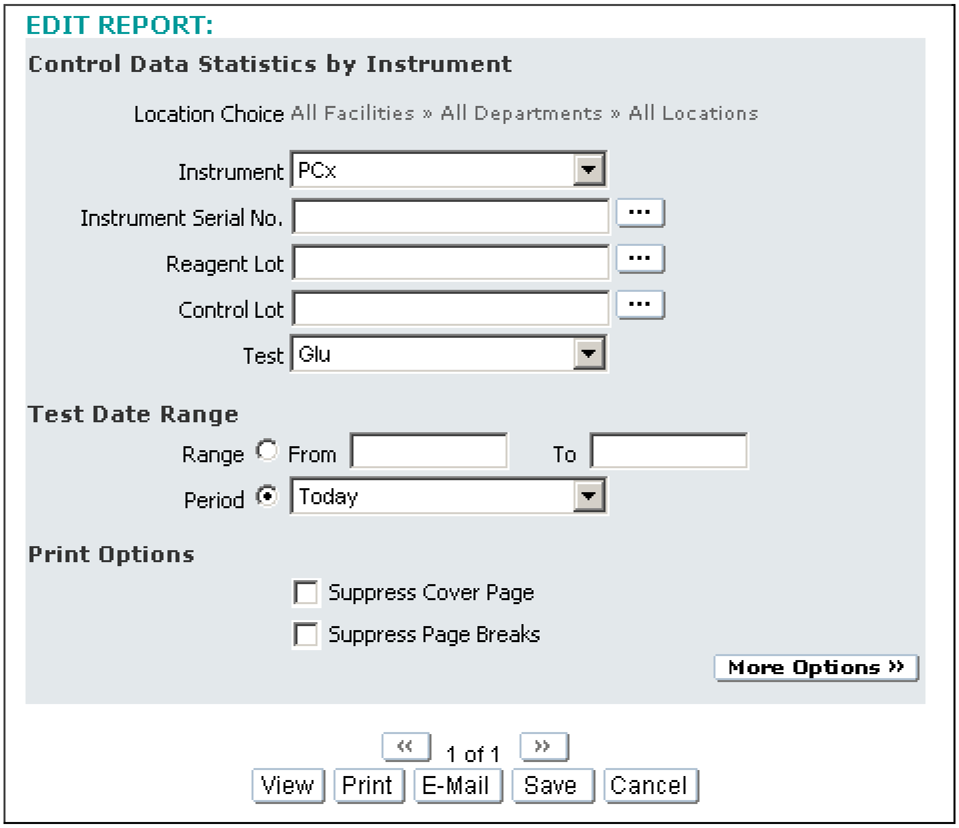
Select the filter options for the report:

Options	Description
Instrument	Click on the ··· button to display the pop-up browser window with the **Instrument Lookup** list. Select an instrument type and click on the **OK** button in the browser window; click the **Cancel** button to return to **Edit Report** screen.
Comment Code	Enter a comment code (only one comment code can be entered per report).
Operator ID	Click on the ··· button to display the pop-up browser window with the **Operator ID Lookup** list. Select an operator, multiple operators, or all operators and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen. Click the **Suppress** checkbox to exclude the Operator ID from the printed report.

Options	Description
Operator Name	Click the **Suppress** checkbox to exclude the Operator Name from the printed report.
Result type	System default displays **All** result types. Select a single result type from the dropdown list to customize the report.

Control Data Statistics by Instrument

The Control Data Statistics by Instrument report displays a monthly summary of control test results, including results above or below the range, mean, SD and %CV, by instrument.



Select a Facility Department or Location in the Tree.

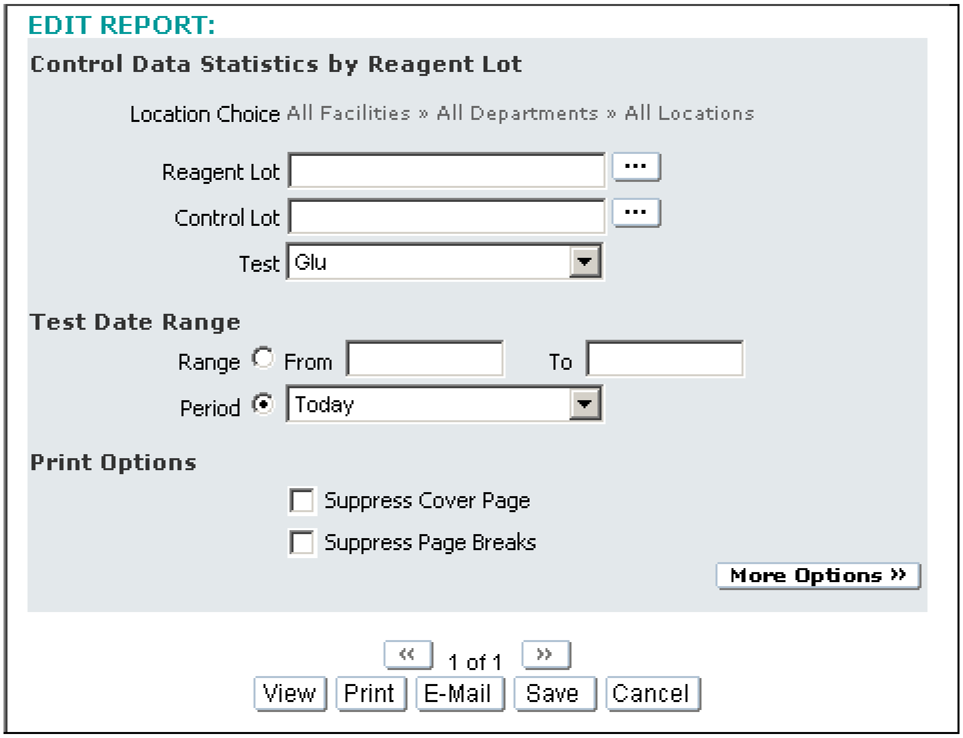
Select the filter options for the report:

Options	Description
Instrument	Select an instrument type from the dropdown list.
Instrument Serial No.	Click on the button to display the pop-up browser window with the **Instrument Serial No. Lookup** list, select an Instrument Serial number, multiple Instrument Serial numbers or all Instrument Serial numbers, and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen.
Reagent Lot	Click on the button to display the pop-up browser window with the **Reagent Lot Lookup** list, select a Reagent Lot, multiple Reagent Lots or all Reagent Lots and click on the **OK** button in the pop-up browser window; click on the **Cancel** button to return to the Edit Report screen.

Options	Description
Control Lot	Click on the  button to display the pop-up browser window with the **Control Lot Lookup** list and select a Control Lot, multiple Control Lots or all Control Lots and click on the **OK** button in the pop-up browser window; click on the **Cancel** button to return to the Edit Report screen.
Test	System default displays **GLU** test. Select a test type from the dropdown list to customize the report.

Control Data Statistics by Reagent Lot

The Control Data Statistics by Reagent Lot report displays a monthly summary of control test results, including results above or below the range, mean, SD and %CV, by Reagent Lot.



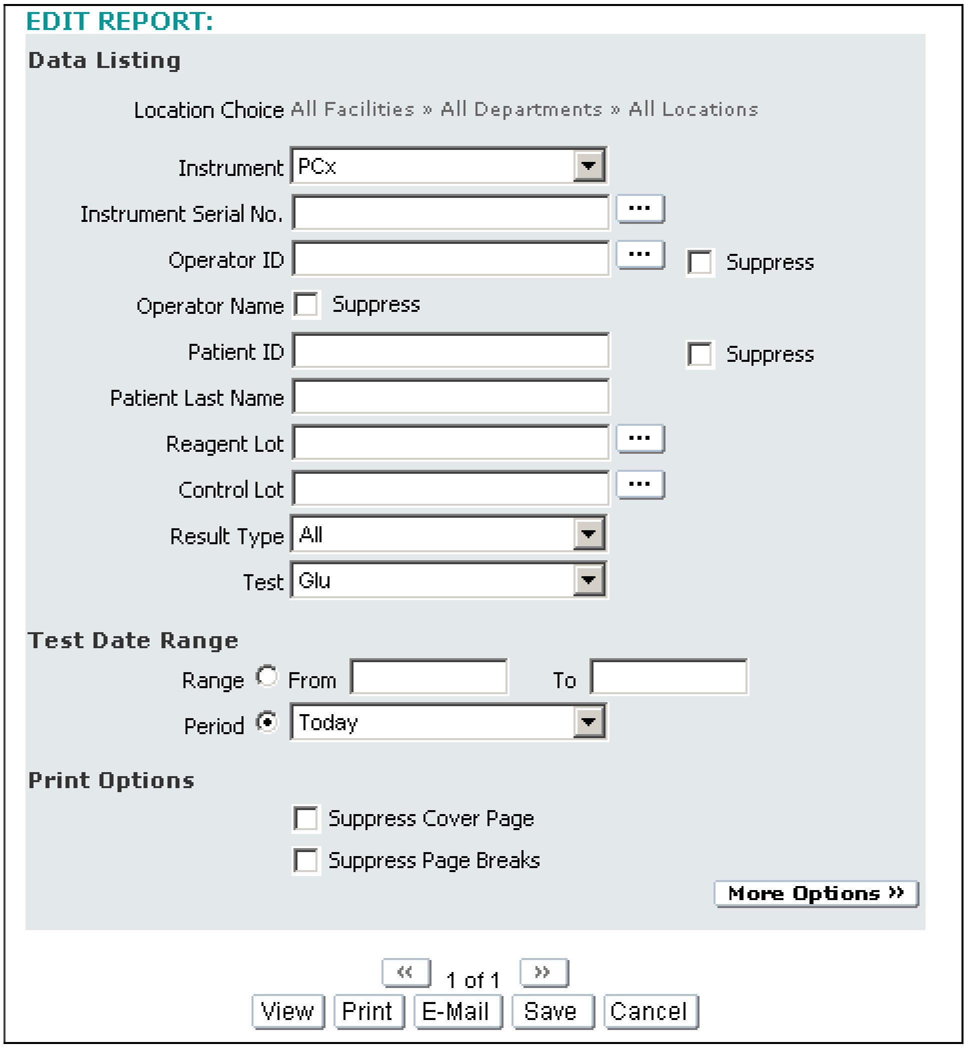
Select a Facility Department or Location in the Tree.

Select the filter options for the report:

Options	Description
Reagent Lot	Click on the  button to display the pop-up browser window with the **Reagent Lot Lookup** list, select a Reagent Lot, multiple Reagent Lots or all Reagent Lots and click on the **OK** button in the pop-up browser window; click on the **Cancel** button to return to the Edit Report screen.
Control Lot	Click on the  button to display the pop-up browser window with the **Control Lot Lookup** list and select a Control Lot, multiple Control Lots or all Control Lots and click on the **OK** button in the pop-up browser window; click on the **Cancel** button to return to the Edit Report screen.
Test	System default displays **GLU** test. Select a test type from the dropdown list to customize the report.

Data Listing

The Data Listing report provides a tabular display of information associated to individual test results for one or all test result types (i.e. patient, control, etc).



Select a Facility Department or Location in the Tree.

Select the filter options for the report:

Options	Description
Instrument	Select an instrument type from the dropdown list.
Instrument Serial No.	Click on the ... button to display the pop-up browser window with the **Instrument Serial No. Lookup** list, select an Instrument Serial number, multiple Instrument Serial numbers or all Instrument Serial numbers, and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen.

Options	Description
Operator ID	Click on the button to display the pop-up browser window with the **Operator ID Lookup** list. Select an operator, multiple operators, or all operators and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen. Click the **Suppress** checkbox to exclude the Operator ID from the printed report.
Operator Name	Click the **Suppress** checkbox to exclude the Operator Name from the printed report.
Patient ID	Enter a Patient ID. Click the **Suppress** checkbox to exclude the Patient ID from the printed report.
Patient Name	Enter a Patient Name, filtered by last name.
Reagent Lot	Click on the button to display the pop-up browser window with the **Reagent Lot Lookup** list, select a Reagent Lot, multiple Reagent Lots or all Reagent Lots and click on the **OK** button in the pop-up browser window; click on the **Cancel** button to return to the Edit Report screen.
Control Lot	Click on the button to display the pop-up browser window with the **Control Lot Lookup** list and select a Control Lot, multiple Control Lots or all Control Lots and click on the **OK** button in the pop-up browser window; click on the **Cancel** button to return to the Edit Report screen.
Result type	System default displays **All** result types. Select a single result type from the dropdown list to customize the report.
Test	System default displays **GLU** test. Select a test type from the dropdown list to customize the report.

Glucose Meter Nurse Manager Report

The Glucose Meter Nurse Manager report displays the total number of Patient and QC tests performed, the percentage of in-range and out-of-range tests performed, the total number of outliers without a comment and total number of instrument alarms generated by an Operator. There is also space document action and follow-up.

The report also indicates if an Operator is compliant. An Operator is considered compliant if the Operator has performed a successful test. A test is considered successful if the test does not have any of the following alarms associated with it: Out of Range QC, Out of Range-LIS, Invalid Operator-LIS, Invalid Patient-LIS, Repeat Test-LIS, Invalid Operator-Inst, Invalid QC-Inst and Invalid Reagent-Inst.

If any of the alarms listed are associated with a test completed by the Operator , "1" will appear under the *# Instrument Alarms* column for every instance that the alarm(s) is generated for a test performed by the Operator (i.e. two Out-of-Range QC and three Out-of-Range Result alarms would yield a value of 5 in the # Instrument Alarms column). If an Operator test generates an alarm, but the alarm is not among those listed above there is no impact on the "compliance" status.

The information is presented as follows:

Operator Comment Documentation of Out of Range QC

- *% of QC in Range*
- *# QC Outliers*
- *# QC Outliers without Comments*

Operator Comment Documentation of Alert Values

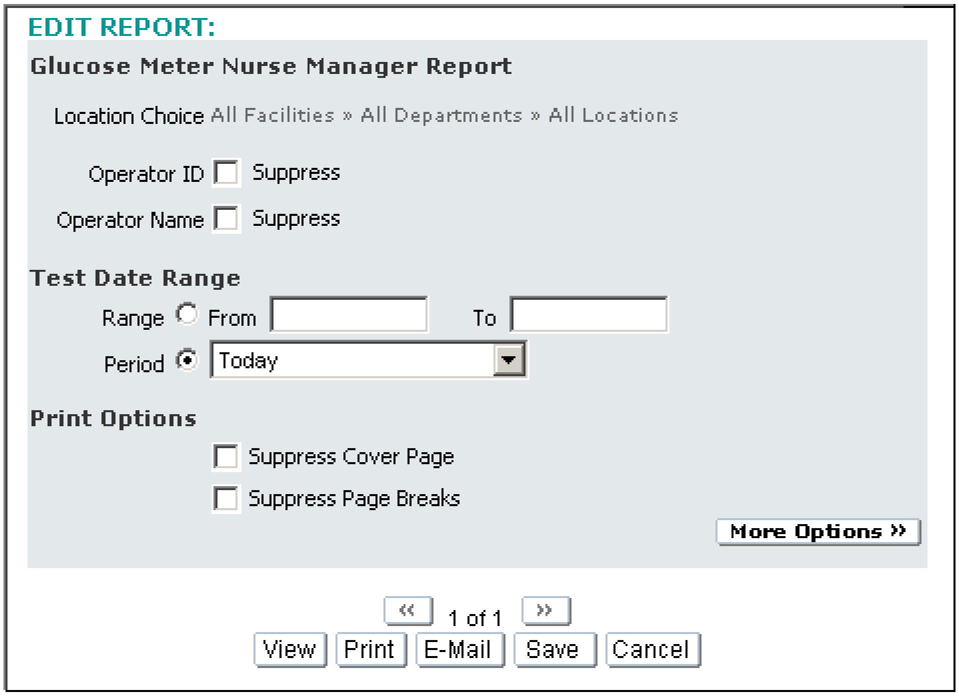
- *# Instrument Alarms*
- *# Instrument Alarms without Comments*

Compliant Operator

- *Yes or No*

There is also space document action and follow-up.

This report is specific to Abbott glucose monitors only and will not report data for other instrument types.



Select a Facility Department or Location in the Tree.

Select the filter options for the report:

Options	Descriptions
Operator ID	Click the **Suppress** checkbox to exclude the Operator ID from the printed report.
Operator Name	Click the **Suppress** checkbox to exclude the Operator Name from the printed report.

Glucose Meter QI Representative Report

The Glucose Meter QI Representative Report displays location specific quality indicator data. The report includes six indicator categories: Meter Usage, QC Within Range, Documentation of Out of Range QC, Proficiency Testing, Documentation of Alert Values and Compliance.

The report displays the total number of Patient, QC tests performed, the percentage of in-range and out-of-range tests performed, the total number of outliers without a comment, total number of Proficiency tests performed and the total number of instrument alarms generated by an Operator. There is also space document action and follow-up.

The report also indicates if an Operator is compliant. An Operator is considered compliant if the Operator has performed a successful test. A test is considered successful if the test does not have any of the following alarms associated with it: Out of Range QC, Out of Range-LIS, Invalid Operator-LIS, Invalid Patient-LIS, Repeat Test-LIS, Invalid Operator-Inst, Invalid QC-Inst and Invalid Reagent-Inst.

If any of the alarms listed are associated with a test completed by the Operator a 1 will appear under the *# Instrument Alarms* column for every instance that the alarm(s) is generated for a test performed by the Operator (i.e. two Out-of-Range QC and three Out-of-Range-Result alarms would yield a value of 5 in the # Instrument Alarms column). If an Operator test generates an alarm, but the alarm is not among those listed above there is no impact on the "compliance" status.

The information is presented as follows:

Meter Usage (Indicator 1)
- Total # Patient Sample
- Total QC performed

QC Within Range (Indicator 2)
- % of QC in Range

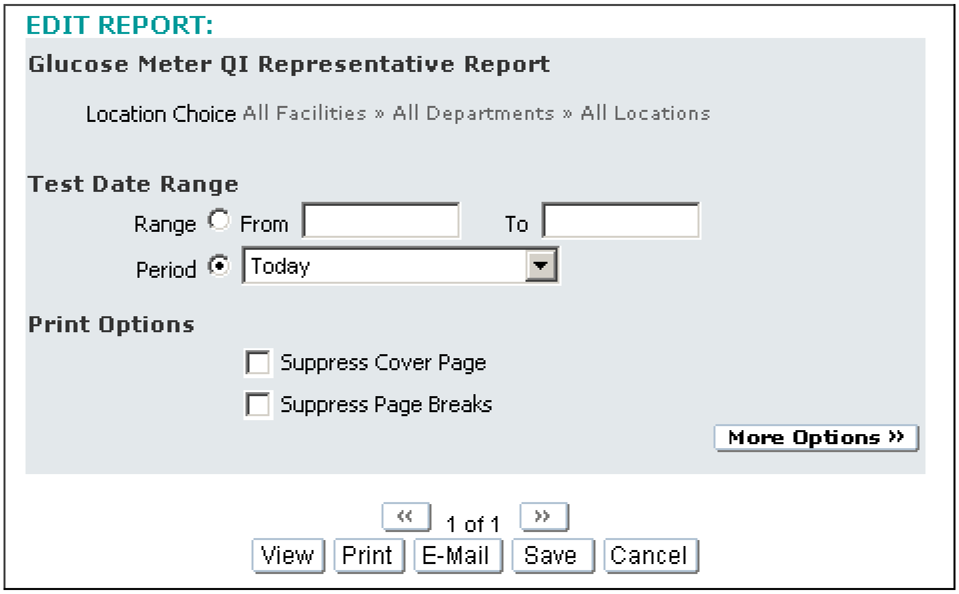
Documentation of Out of Range QC (Indicator 3)
- # QC Outliers
- # QC Outliers without Comments

Proficiency Testing (Indicator 4)
- Proficiency testing performed during this period

Documentation of Alert Values (Indicator 5)
- # Instrument Alarms
- # Instrument Alarms without Comments

Compliant Operator (Indicator 6)
- Yes or No

This report is specific to Abbott glucose monitors only and will not report data for other instrument types.



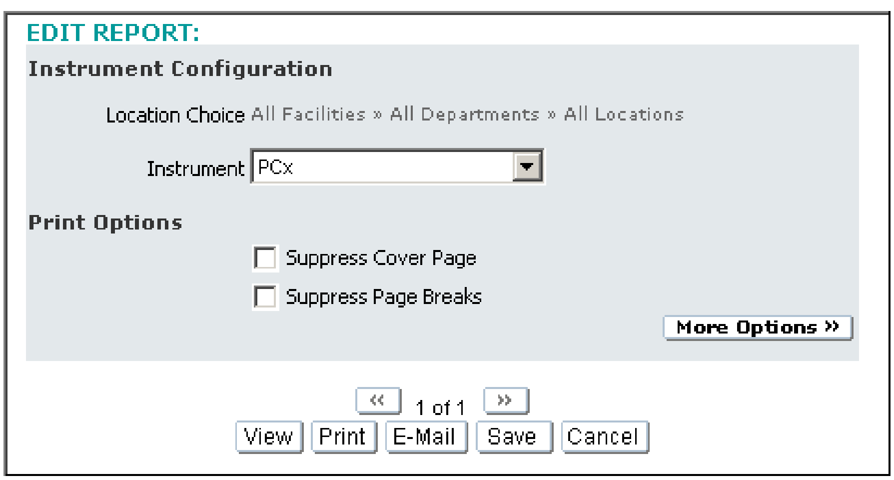
Select a Facility Department or Location in the Tree.

Select the filter options for the report.

Instrument Configuration Report

The Instrument Configuration report displays the configuration settings of the specified Abbott glucose monitor by location.

The instrument configuration settings must be saved (new or default settings) prior to running this report, otherwise the report will be blank.



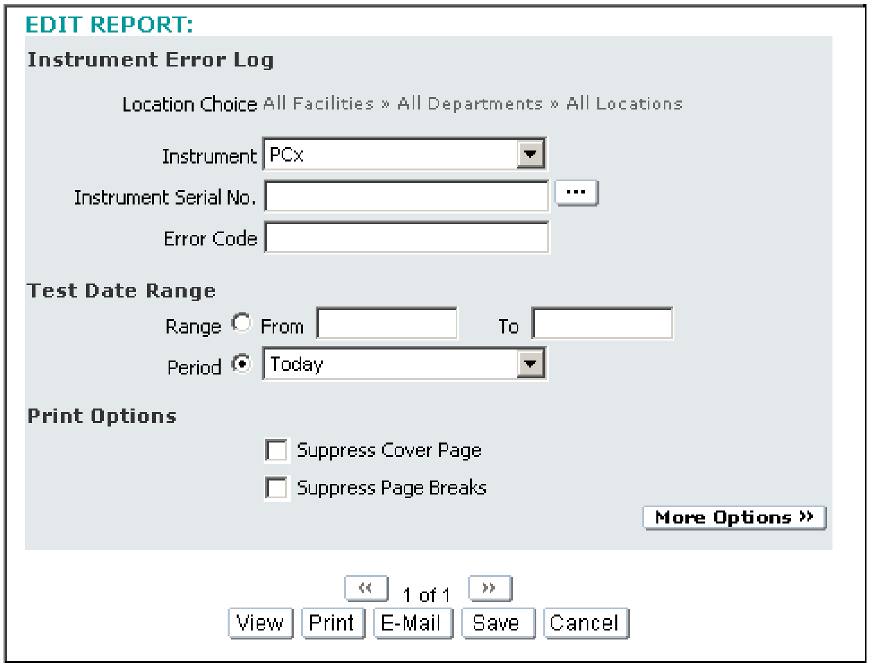
Select a Facility Department or Location in the Tree.

Select the filter options for the report:

Instrument Select an instrument type from the dropdown list.

Instrument Error Log

The Instrument Error Log provides a tabular display of error codes uploaded from Abbott glucose monitors only.



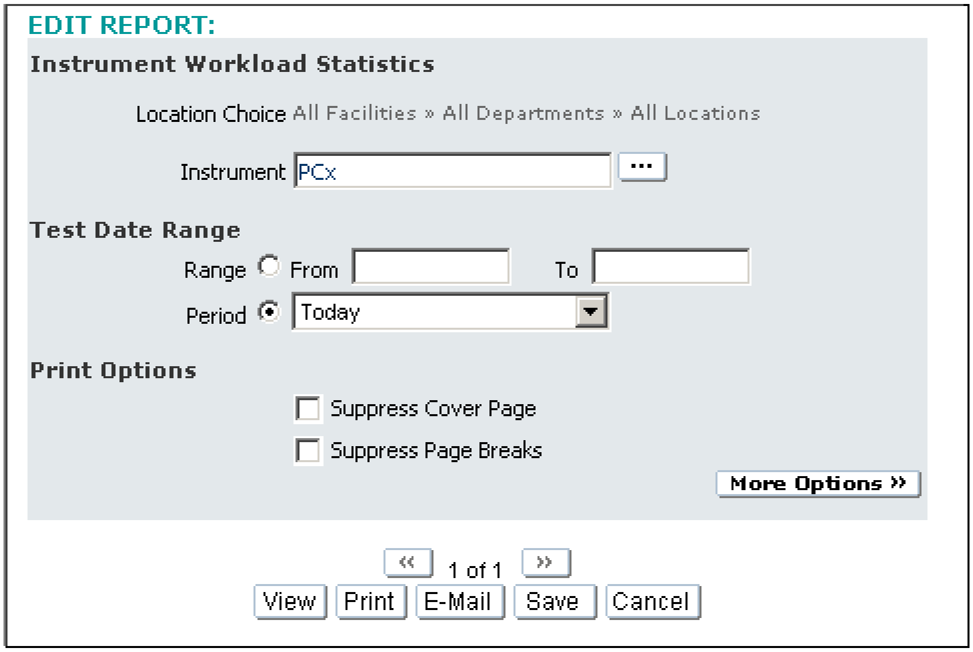
Select a Facility Department or Location in the Tree.

Select the filter options for the report:

Options	Descriptions
Instrument	Select an instrument type from the dropdown list.
Instrument Serial No.	Click on the  button to display the pop-up browser window with the **Instrument Serial No. Lookup** list, select an Instrument Serial Number, multiple Instrument Serial Numbers or all Instrument Serial Numbers, and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen.
Error Code	Enter an error code (only one error code can be entered per report).

Instrument Workload Statistics

The Instrument Workload Statistic report displays a tabular summary of workload statistics per instrument including the number of patient, control, proficiency, linearity and electronic QC (when applicable) tests.



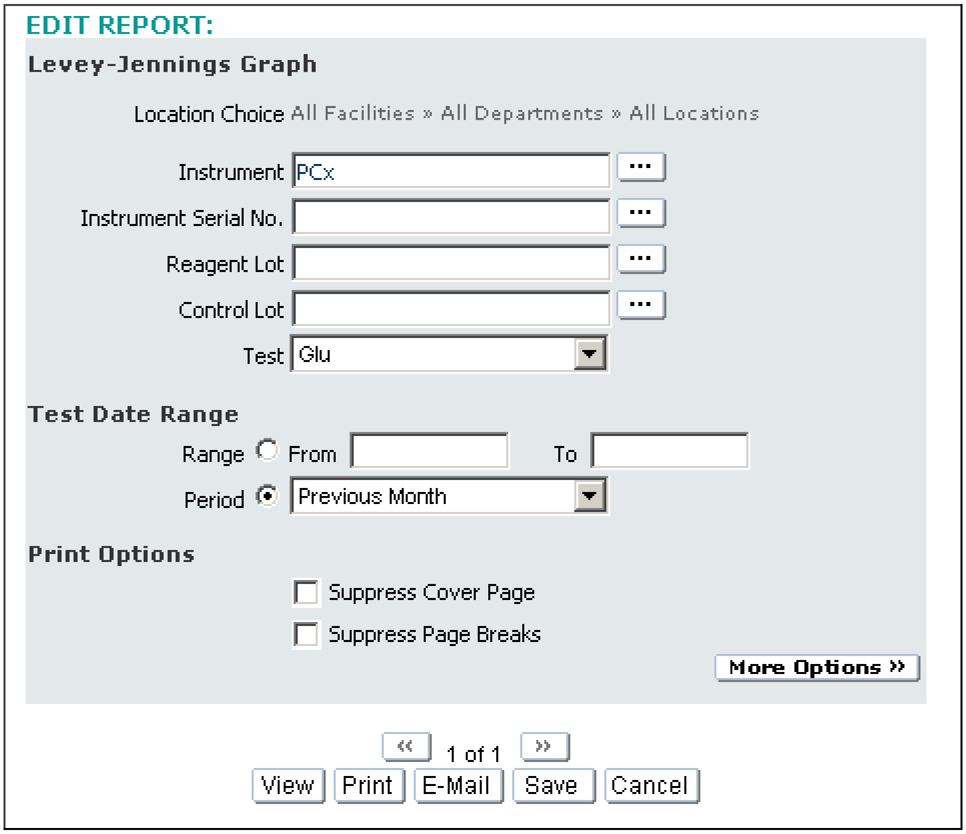
Select a Facility Department or Location in the Tree.

Select the filter options for the report:

Options	Descriptions
Instrument	Click on the ... button to display the pop-up browser window with the **Instrument Lookup** list, select an Instrument, multiple Instruments or all Instruments, and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen.

Levey-Jennings Graph

The Levey-Jennings Graph provides a graphical and tabular display per instrument of control data trends and statistics by reagent lot.



Select a Facility Department or Location in the Tree.

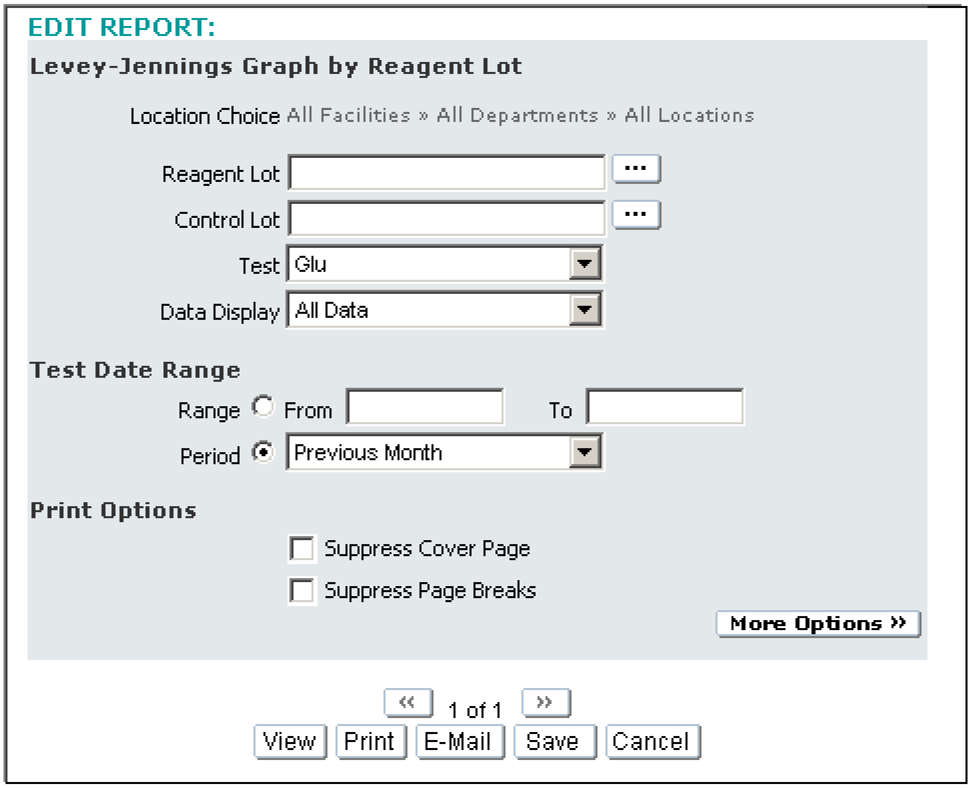
Select the filter options for the report:

Options	Descriptions
Instrument	Click on the ... button to display the pop-up browser window with the **Instrument Lookup** list, select an Instrument, multiple Instruments or all Instruments, and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen.
Instrument Serial No.	Click on the ... button to display the pop-up browser window with the **Instrument Serial No. Lookup** list, select an Instrument Serial number, multiple Instrument Serial numbers or all Instrument Serial numbers, and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen.

Options	Descriptions
Reagent Lot	Click on the  button to display the pop-up browser window with the **Reagent Lot Lookup** list, select a Reagent Lot, multiple Reagent Lots or all Reagent Lots and click on the **OK** button in the pop-up browser window; click on the **Cancel** button to return to the Edit Report screen.
Control Lot	Click on the  button to display the pop-up browser window with the **Control Lot Lookup** list and select a Control Lot, multiple Control Lots or all Control Lots and click on the **OK** button in the pop-up browser window; click on the **Cancel** button to return to the Edit Report screen.
Test	System default displays **GLU** test. Select a test type from the dropdown list to customize the report.

Levey-Jennings Graph by Reagent Lot

The Levey-Jennings Graph by Reagent Lot provides a graphical and tabular display of control data trends and statistics by reagent lot only.



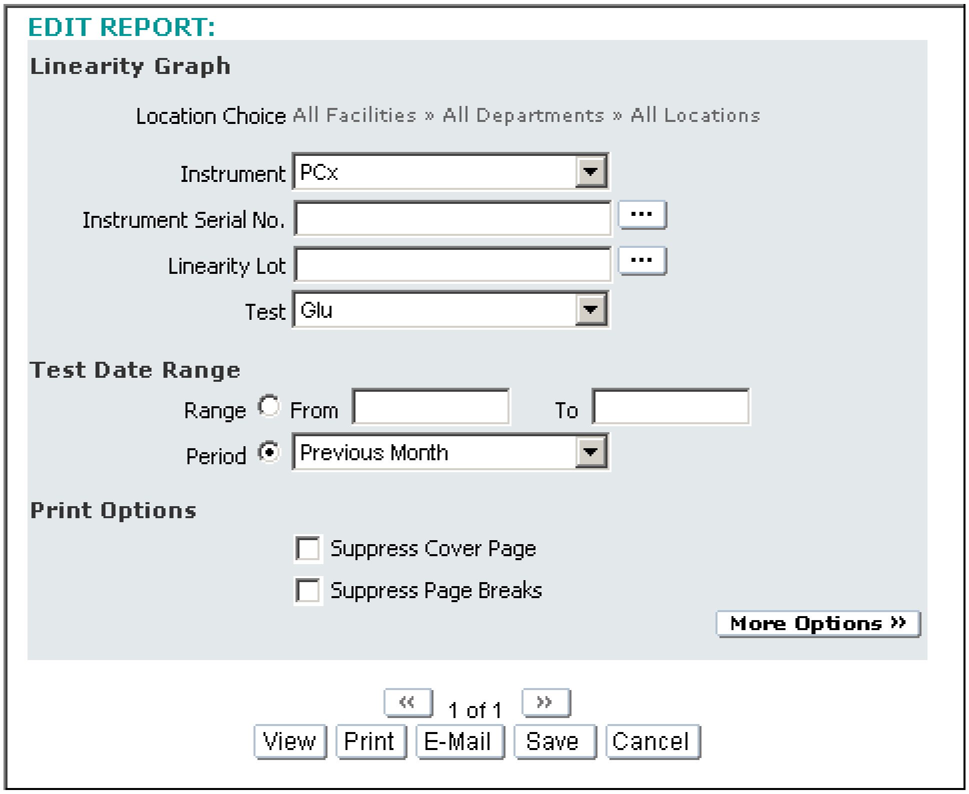
Select a Facility Department or Location in the Tree.

Select the filter options for the report:

Options	Descriptions
Reagent Lot	Click on the ... button to display the pop-up browser window with the **Reagent Lot Lookup** list, select a Reagent Lot, multiple Reagent Lots or all Reagent Lots and click on the **OK** button in the pop-up browser window; click on the **Cancel** button to return to the Edit Report screen.
Control Lot	Click on the ... button to display the pop-up browser window with the **Control Lot Lookup** list and select a Control Lot, multiple Control Lots or all Control Lots and click on the **OK** button in the pop-up browser window; click on the **Cancel** button to return to the Edit Report screen.
Test	System default displays **GLU** test. Select a test type from the dropdown list to customize the report.
Data Display	System default displays **All Data.** Select data display type from the dropdown list to customize the report.

Linearity Graph

The Linearity Graph provides a graphical and tabular display per instrument of calibration verification and linearity test results across the reagent assay range.



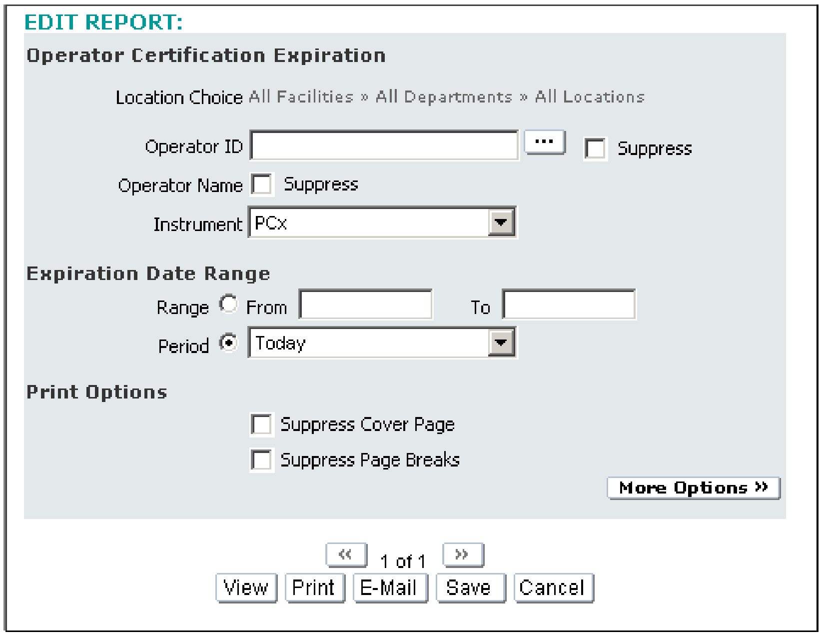
Select a Facility Department or Location in the Tree.

Select the filter options for the report:

Options	Descriptions
Instrument	Select an instrument type from the dropdown list.
Instrument Serial No.	Click on the  button to display the pop-up browser window with the **Instrument Serial No. Lookup** list, select an Instrument Serial number, multiple Instrument Serial numbers or all Instrument Serial numbers, and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen.
Linearity Lot	Click on the  button to display the pop-up browser window with the **Linearity Lot Lookup** list, select a Linearity Lot, multiple Linearity Lots or All Linearity Lots, and click on the **OK** button in the pop-up browser window; click on the **Cancel** button to return to the Edit Report screen.
Test	System default displays **GLU** test. Select a test type from the dropdown list to customize the report.

Operator Certification Expiration Report

The Operator Certification Expiration report provides a tabular display of operators whose certification will expire during a specified date range.



Select a Facility Department or Location in the Tree.

Select the filter options for the report:

Options	Descriptions
Operator ID	Click on the  button to display the pop-up browser window with the **Operator ID Lookup** list. Select an operator, multiple operators, or all operators and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen. Click the **Suppress** checkbox to exclude the Operator ID from the printed report.
Operator Name	Click the **Suppress** checkbox to exclude the Operator Name from the printed report.
Instrument	Select an instrument type from the dropdown list.

Expiration Date Range

Range button

- Click on the **Range** button to display the calendar icon in the **From** and **To** entry fields (this option disables the **Period** button).

- The **From** and **To** date fields automatically display today's date unless changed.

To **change** the date range:

- Click on the calendar icon next to the From field to display the pop-up calendar and select an appropriate date.

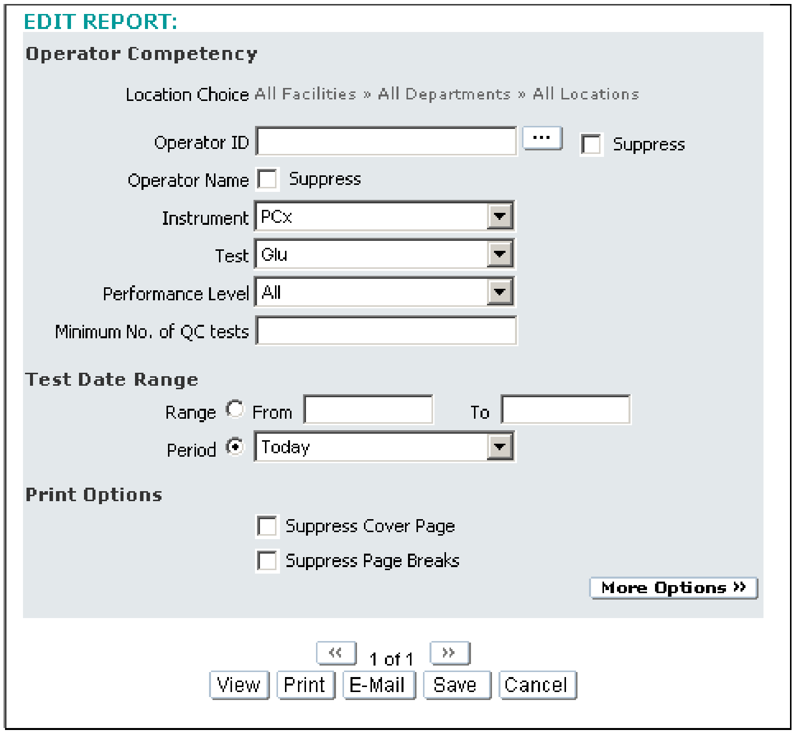
- Click on the calendar icon next to the **To** field to display the pop-up calendar and select an appropriate date.

Period button

- Click on the **Period** button and select a period from the dropdown list. This option disables the **Range** button.

Operator Competency Report

The Operator Competency report provides a tabular display of an operator's performance (QC and patient test statistics).



Select a Facility Department or Location in the Tree.

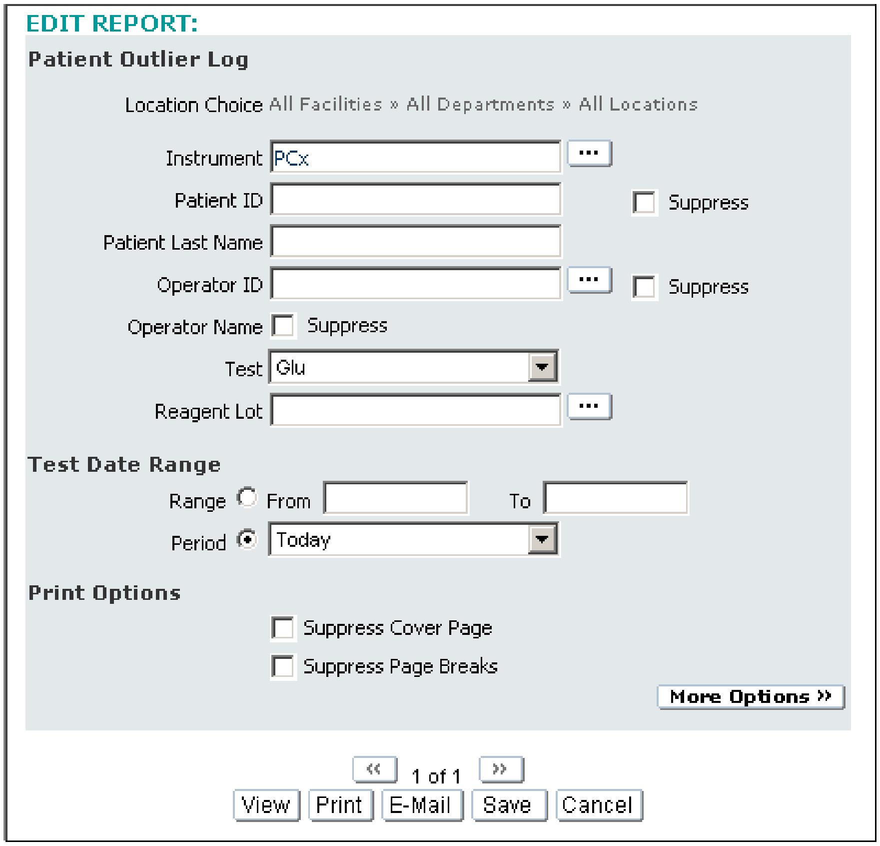
Select the filter options for the report:

Options	Descriptions
Operator ID	Click on the ... button to display the pop-up browser window with the **Operator ID Lookup** list. Select an operator, multiple operators, or all operators and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen. Click the **Suppress** checkbox to exclude the Operator ID from the printed report.
Operator Name	Click the **Suppress** checkbox to exclude the Operator Name from the printed report.
Instrument	Select an instrument type from the dropdown list.
Test	System default displays **GLU** test. Select a test type from the dropdown list to customize the report.

Options	Descriptions
Performance Level	System default displays **All.** Select a performance level from the dropdown list to customize the report.
Minimum No. of QC Tests	Entry field for the minimum number of QC tests required. Only operators who have performed at least the number of QC tests specified here will be included in the report.

Patient Outlier Log

The Patient Outlier Log provides a tabular display of patient test results outside the action range specified at the time the patient test was performed.



Select a Facility Department or Location in the Tree.

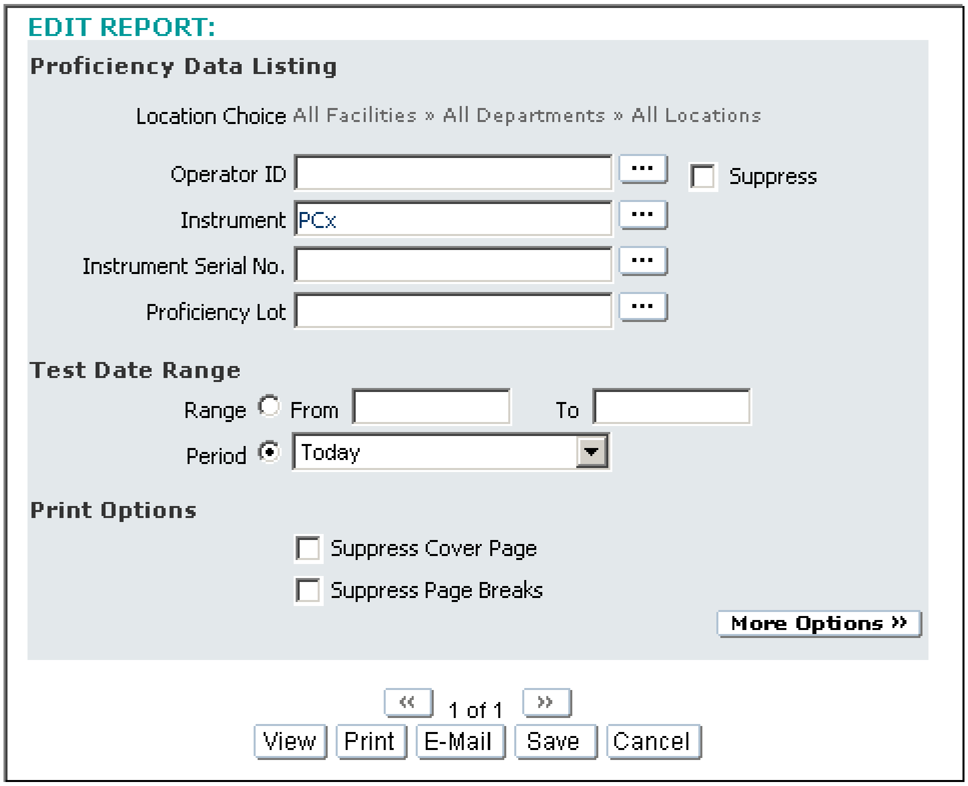
Select the filter options for the report:

Options	Descriptions
Instrument	Click on the ... button to display the pop-up browser window with the **Instrument Lookup** list, select an Instrument, multiple Instruments or all Instruments, and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen.
Patient ID	Enter a Patient ID. Click the **Suppress** checkbox to exclude the Patient ID from the printed report.
Patient Name	Enter a Patient Name, filtered by last name. Click the **Suppress** checkbox to exclude the Patient Name from the printed report.

Options	Descriptions
Operator ID	Click on the  button to display the pop-up browser window with the **Operator ID Lookup** list. Select an operator, multiple operators, or all operators and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen. Click the **Suppress** checkbox to exclude the Operator ID from the printed report.
Operator Name	Click the **Suppress** checkbox to exclude the Operator Name from the printed report.
Test	System default displays **GLU** test. Select a test type from the dropdown list to customize the report.
Reagent Lot	Click on the  button to display the pop-up browser window with the **Reagent Lot Lookup** list, select a Reagent Lot, multiple Reagent Lots or all Reagent Lots and click on the **OK** button in the pop-up browser window; click on the **Cancel** button to return to the Edit Report screen.

Proficiency Data Listing Report

The Proficiency Data Listing report provides a tabular display per instrument of information associated to proficiency test results.



Select a Facility Department or Location in the Tree.

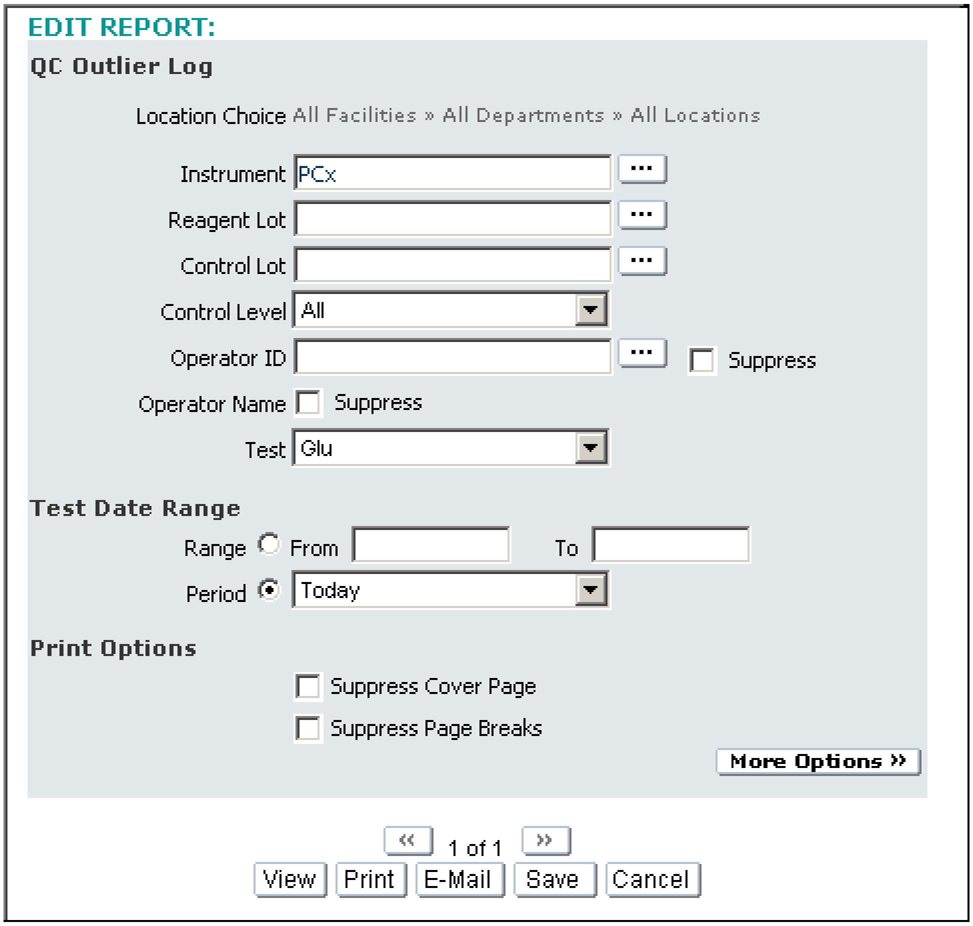
Select the filter options for the report:

Options	Descriptions
Operator ID	Click on the ... button to display the pop-up browser window with the **Operator ID Lookup** list. Select an operator, multiple operators, or all operators and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen. Click the **Suppress** checkbox to exclude the Operator ID from the printed report.
Instrument	Click on the ... button to display the pop-up browser window with the **Instrument Lookup** list, select an Instrument, multiple Instruments or all Instruments, and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen.

Options	Descriptions
Instrument Serial No.	Click on the  button to display the pop-up browser window with the **Instrument Serial No. Lookup** list, select an Instrument Serial number, multiple Instrument Serial numbers or all Instrument Serial numbers, and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen.
Proficiency Lot	Click on the  button to display the pop-up browser window with the **Proficiency Lot Lookup** list, select a Proficiency lot, multiple Proficiency lots or all Proficiency lots, and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen.

QC Outlier Log

The QC Outlier Log report provides a tabular display of control test results outside the reagent lot range specified in QCM3 (at the time of the report).



Select a Facility Department or Location in the Tree.

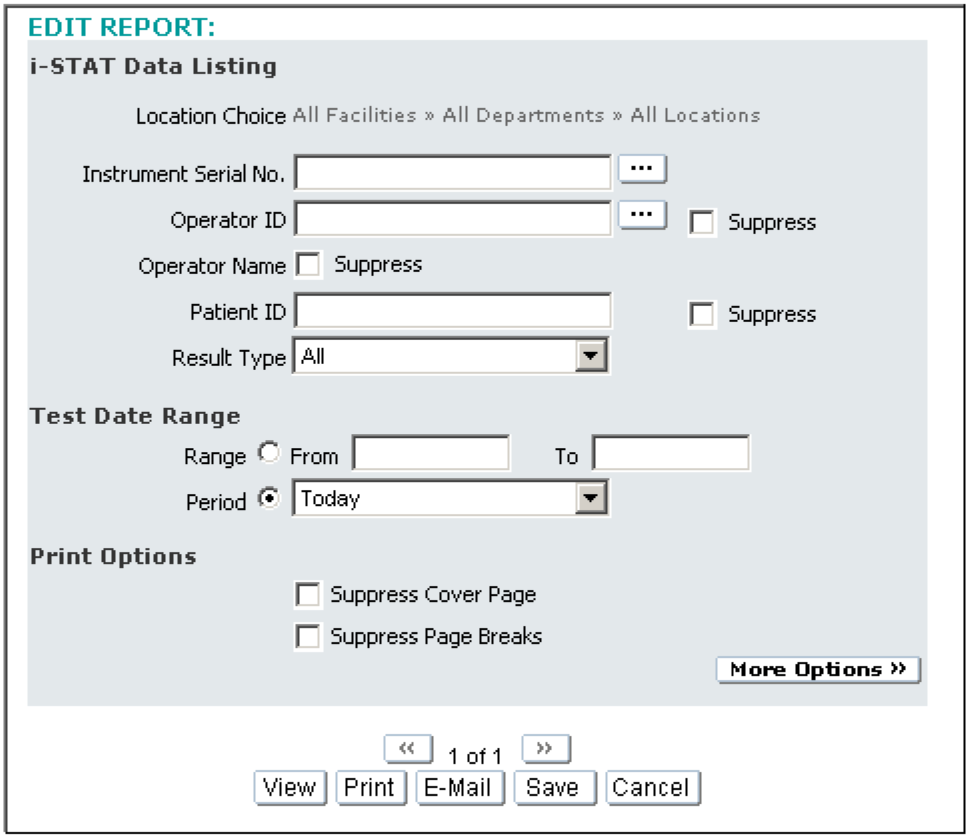
Select the filter options for the report:

Options	Descriptions
Instrument	Click on the ... button to display the pop-up browser window with the **Instrument Lookup** list, select an Instrument, multiple Instruments or all Instruments, and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen.
Reagent Lot	Click on the ... button to display the pop-up browser window with the **Reagent Lot Lookup** list, select a Reagent Lot, multiple Reagent Lots or all Reagent Lots and click on the **OK** button in the pop-up browser window; click on the **Cancel** button to return to the Edit Report screen.

Options	Descriptions
Control Lot	Click on the ... button to display the pop-up browser window with the **Control Lot Lookup** list and select a Control Lot, multiple Control Lots or all Control Lots and click on the **OK** button in the pop-up browser window; click on the **Cancel** button to return to the Edit Report screen.
Control Level	System default displays **All.** Select All, Low, Normal or high from the dropdown list to customize the Report.
Operator ID	Click on the ... button to display the pop-up browser window with the **Operator ID Lookup** list. Select an operator, multiple operators, or all operators and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen. Click the **Suppress** checkbox to exclude the Operator ID from the printed report.
Operator Name	Click the **Suppress** checkbox to exclude the Operator Name from the printed report.
Test	System default displays **GLU** test. Select a test type from the dropdown list to customize the report.

i-STAT Data Listing

The i-STAT Data Listing report provides a tabular display per instrument of information associated to i-STAT test results, including test attributes, according to the selected filter options.



Select a Facility Department or Location in the Tree.

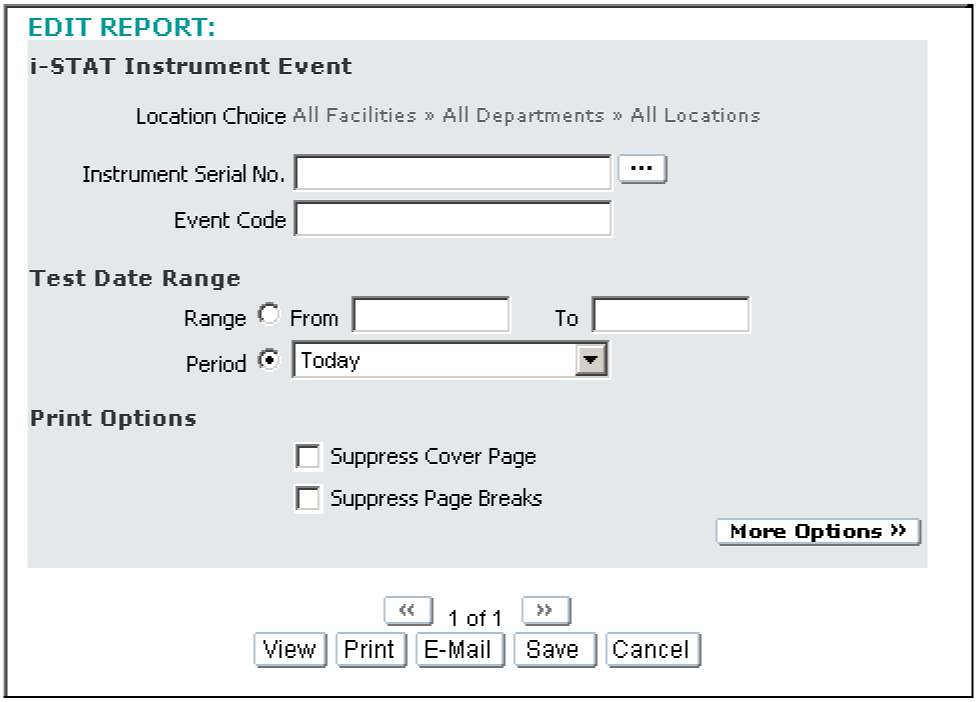
Select the filter options for the report:

Options	Descriptions
Instrument Serial No.	Click on the  button to display the pop-up browser window with the **Instrument Serial No. Lookup** list, select an Instrument Serial number, multiple Instrument Serial numbers or all Instrument Serial numbers, and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen.
Operator ID	Click on the  button to display the pop-up browser window with the **Operator ID Lookup** list. Select an operator, multiple operators, or all operators and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen. Click the **Suppress** checkbox to exclude the Operator ID from the printed report.

Options	Descriptions
Operator Name	Click the **Suppress** checkbox to exclude the Operator Name from the printed report.
Patient ID	Enter a Patient ID. Click the **Suppress** checkbox to exclude the Patient ID from the printed report.
Result type	System default displays **All** result types. Select a single result type from the dropdown list to customize the report.

i-STAT Instrument Event

The i-STAT Instrument Event report provides a tabular display of i-STAT Event Codes per instrument.



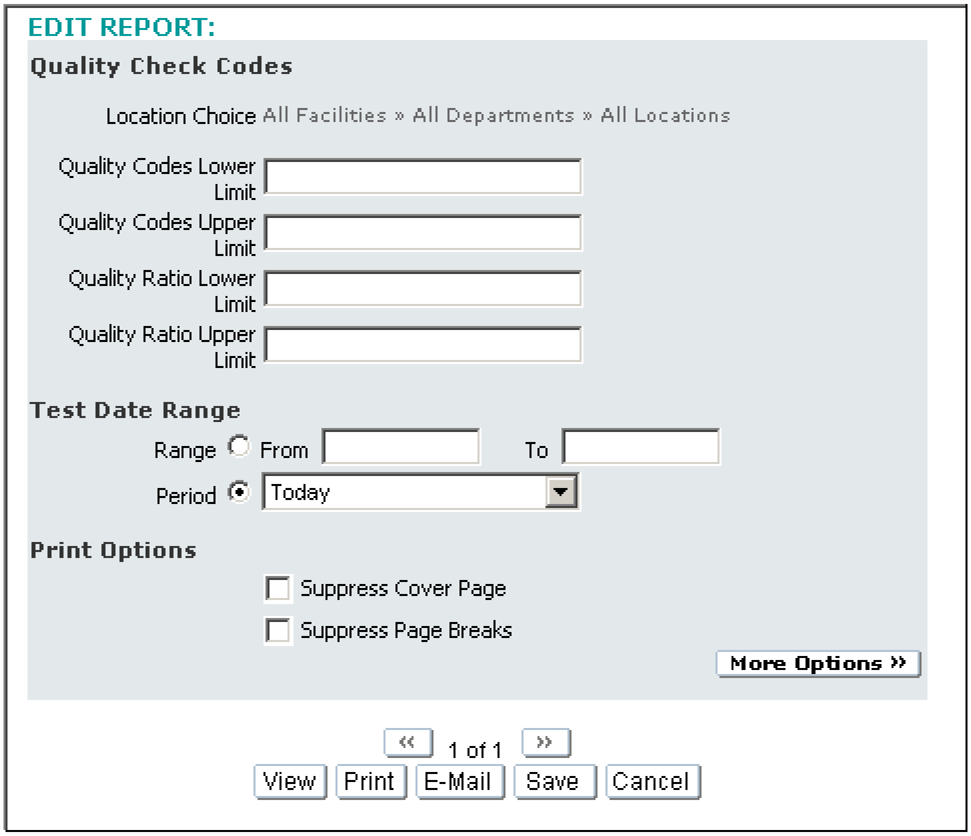
Select a Facility Department or Location in the Tree.

Select the filter options for the report:

Options	Descriptions
Instrument Serial No.	Click on the ... button to display the pop-up browser window with the **Instrument Serial No. Lookup** list, select an Instrument Serial number, multiple Instrument Serial numbers or all Instrument Serial numbers, and click on the **OK** button in the browser window; click on the **Cancel** button to return to the Edit Report screen.
Event Code	Enter an event code (only one event code can be entered per report).

Quality Check Codes

The Quality Check Codes report provides a tabular display per location of quality check codes by type.



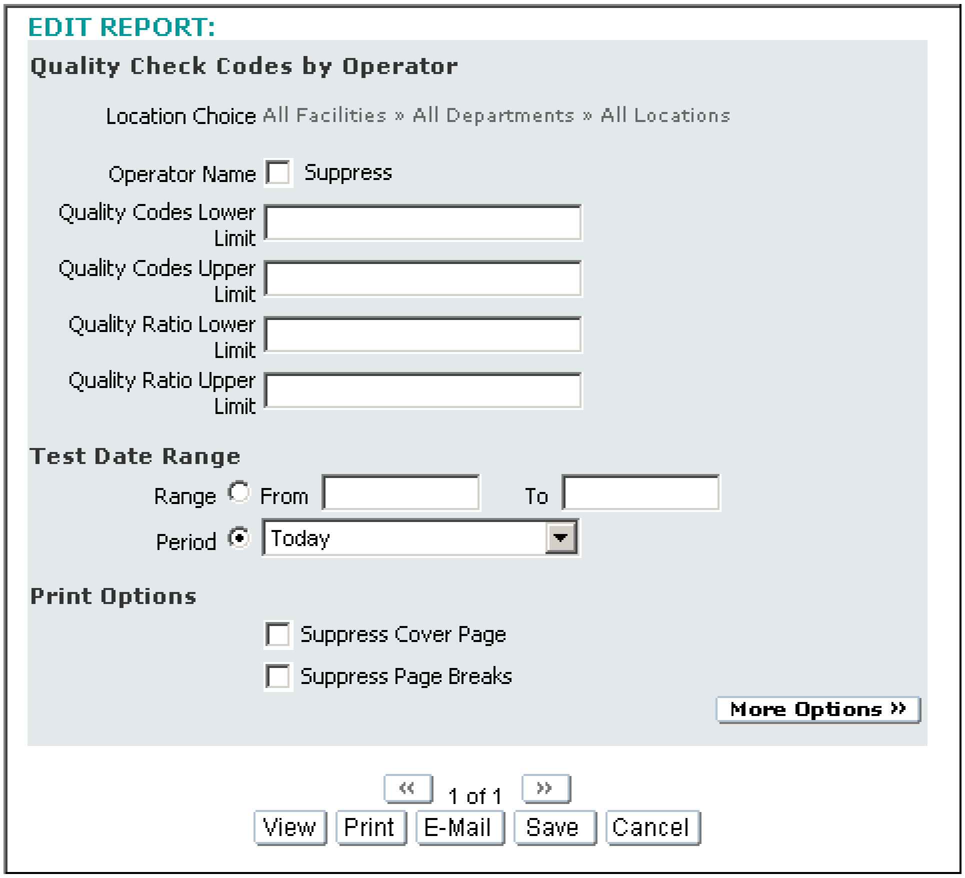
Select a Facility Department or Location in the Tree.

Select the filter options for the report:

Options	Descriptions
Quality Codes Lower Limit	Entry field for Quality Codes Lower Limit.
Quality Codes Upper Limit	Entry field for Quality Codes Upper Limit.
Quality Ratio Lower Limit	Entry field for Quality Ratio Lower Limit.
Quality Ratio Upper Limit	Entry field for Quality Ratio Upper Limit.

Quality Check Codes by Operator

The Quality Check Codes by Operator report provides a tabular display of quality check codes by type per operator.



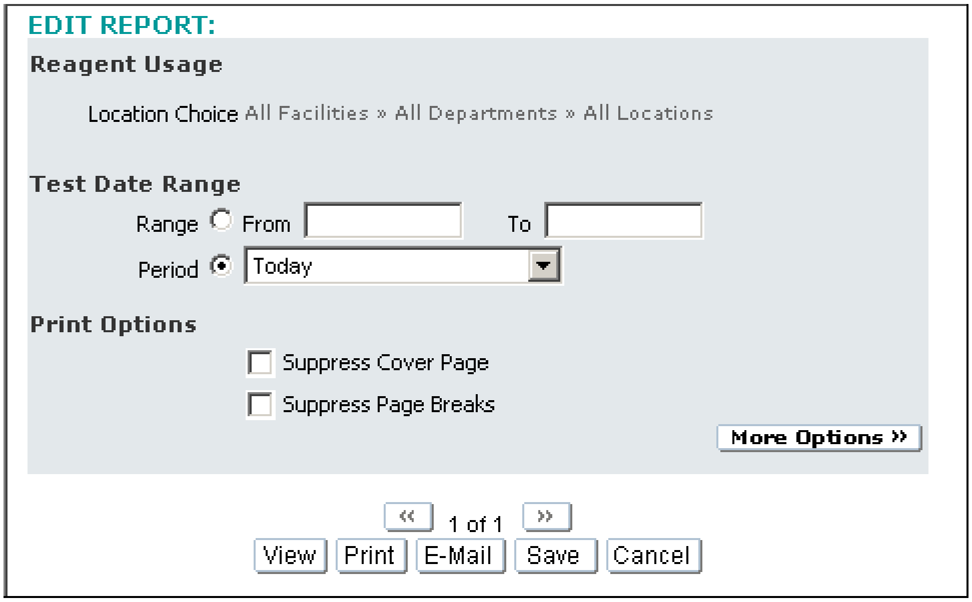
Select a Facility Department or Location in the Tree.

Select the filter options for the report:

Options	Descriptions
Operator Name	Click the **Suppress** checkbox to exclude the Operator Name from the printed report.
Quality Codes Lower Limit	Entry field for Quality Codes Lower Limit.
Quality Codes Upper Limit	Entry field for Quality Codes Upper Limit.
Quality Ratio Lower Limit	Entry field for Quality Ratio Lower Limit.
Quality Ratio Upper Limit	Entry field for Quality Ratio Upper Limit.

Reagent Usage

The Reagent Usage report provides a summary of i-STAT cartridge usage by type per location.



Select a Facility Department or Location in the Tree.

Select the filter options for the report.

6. Operators

Operators Overview

The **Operators** menu option provides access to three screens for use in managing operators and instrument certifications. The **New** screen allows you to add a new operator and instrument certification. The **Certification** screen allows you to view and update instrument certifications. The **Search** screen provides a simple view of operators. Each screen is available only if your account was granted this permission by the Administrator or POCC.

New Operator Screen

Operators>>New

The **New Operator** screen allows the user to add and certify a new operator. Depending on the user's assigned Function Permissions the user may only be able to add new Operators, but not add instrument certification. Separate permission must be assigned to add and certify an Operator. Applicable Operator Menu Permissions are as follows;

- **Edit Operator Certification** - Allows user permission to add or edit Operator information, including home Location. User may also add or edit (ReCertify) instrument certification.

- **Edit Operator Information** - Allows user permission only to add or edit Operator information, including home Location.

Each Operator is assigned to a home Location within a Facility. Each Facility in the Organization maintains a separate operator list.

Add and Certify New Operator

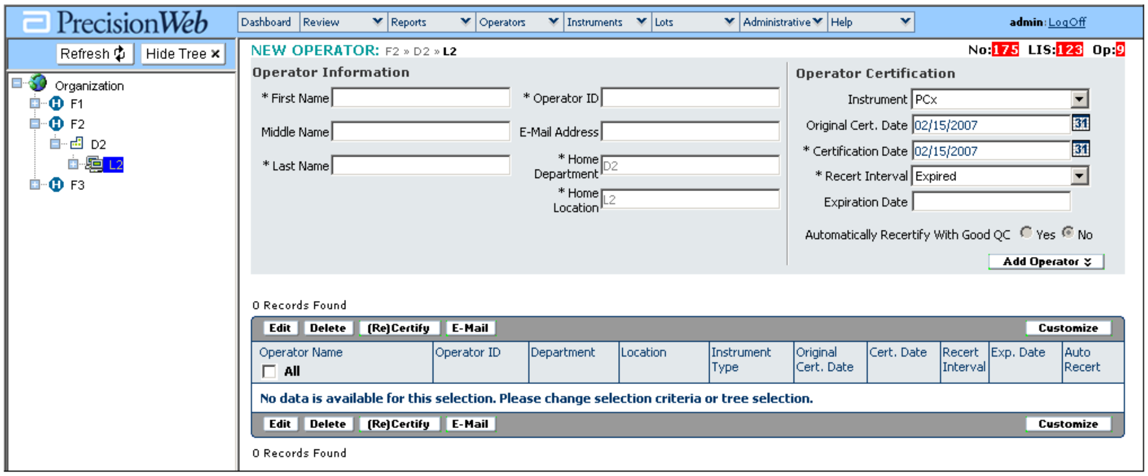
To **add** and certify a new operator:

1. Move the mouse cursor over **Operators** to display the menu options.

2. Click on the **New** option.

    - The **New Operator** screen displays the entry fields for new Operator Information (on the left of the screen) and Operator Certification information (on the right).

    - Each time you select the **New Operator** screen from the menu, the table will be empty.



*First Name, Last Name, Operator ID, Home Department and Home Location are ***required*** entry fields under Operator Information.

*Certification Date and Recert Interval are ***required*** entry fields under Operator Certification.

3. Fill in the First Name and Last Name and Operator ID fields under Operator Information.

   - The Operator ID entry field accepts up to a **maximum** of 30 characters.

4. Click on a **Location** in the Tree to assign the operator to a Home Department and Location.

   - The Home Location field and the associated Home Department field automatically display the selected location.

5. Select the following operator certification options:

Options	Description
Instrument	Select instrument type for certification
Original Cert. Date	The default is today's date. Enter the date the operator was first certified. Calendar allows you to select correct date. Selected value will appear in the Original Certification Date field.
***Certification Date**	The default is today's date. Enter the date of the current (re)certification. Calendar allows you to select correct date. Selected value will appear in the Certification Date field.
***Recert Interval**	Select from: 3 months

Options	Description
	6 months 12 months Never Expire Specify Expired (default) Choosing **"Specify"** will activate the **Expiration Date** field below.
Expiration Date	Enter the expiration date. Calendar allows you to select correct date. Selected value will appear in the Expiration Date field. The default is today's date.
Automatically Re-certify With Good QC	Select Yes or No (default). These buttons become active only when a specific interval is selected from the Expiration Date. Selecting Automatically Re-certify With Good QC will change an Operator's Certification Date from the current date to the date of the passing QC test (low and high), thus extending the Operator's certification date. The defined Recertification Interval remains unchanged. Each time the Operator completed passing QC the Certification Date will be updated.

6. Click the **Add Operator** button to save the data.

   - After the **Add Operator** button is pressed, the certification criteria entered will remain but the Operator Information fields will be cleared for the next new operator (until the screen is closed).

7. The saved Operator will appear in the New Operator table.

To add an additional instrument certification to one or more Operators in the table:

1. Select one or more records from the table by clicking the box(es) in the **Operator Name** column.
2. Select the desired instrument type certification from the Instrument dropdown list in the Operator Certification section.
3. Click the (Re)Certify action button.

4. Select the following operator certification options:

Options	Description
Original Cert. Date	Enter the date the operator was first certified. Calendar allows you to select correct date. Selected value will appear in the Original Certification Date field.
***Certification Date**	Enter the date of the current (re)certification. Calendar allows you to select correct date. Selected value will appear in the Certification Date field.
Expiration Date	Select from: 3 months 6 months 12 months Never Expire Specify Expired (default) Choosing **"Specify"** will activate the box to the right of the **Expiration Date** field.
Automatically Re-certify With Good QC	Select Yes or No (default). These buttons become active only when a specific interval is selected from the Expiration Date. Selecting Automatically Re-certify With Good QC will change an Operator's Certification Date from the current date to the date of the passing QC test (low and high), thus extending the Operator's certification date. The defined Recertification Interval remains unchanged. Each time the Operator completed passing QC the Certification Date will be updated.

5. Click the **Save** button to save the edited data or Click the **Cancel** button to cancel the edit action without saving.

6. The instrument specific certification will appear in the New Operator table as a new row in the table.

> ***Note**: For each instrument type certification a new row will appear in the table for every Operator with the specified certification type. However, each Operator ID is unique and is noted in the database only once. As such deleting an Operator from the system will delete all instrument type certifications for the selected Operator.*

Add a New Operator (no certification permission)

The certification fields in the Operator Certification section are only displayed if you have permission to certify operators. If you do not have permission to certify Operators, the New Operator screen will appear only with the Operator Information fields.

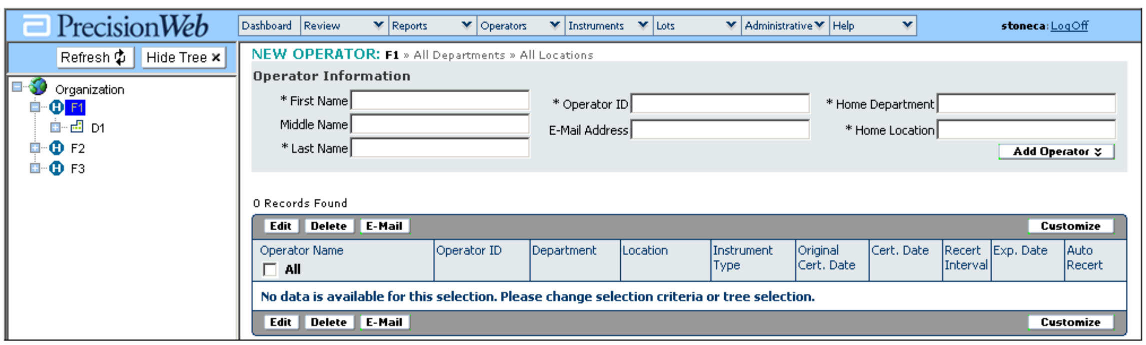
To **add** a new operator:

1. Move the mouse cursor over **Operators** to display the menu options.

2. Click on the **New** option.

    - The **New Operator** screen displays the entry fields for new Operator Information.

    - Each time you select the **New Operator** screen from the menu, the table will be empty.



*First Name, Last Name, Operator ID, Home Department and Home Location are ***required*** entry fields under Operator Information.

3. Fill in the First Name and Last Name and Operator ID fields under Operator Information.

    - The Operator ID entry field accepts up to a **maximum** of 30 characters.

4. Click on a **Location** in the Tree to assign the operator to a Home Department and Location.

    - The Home Location field and the associated Home Department field automatically display the selected location.

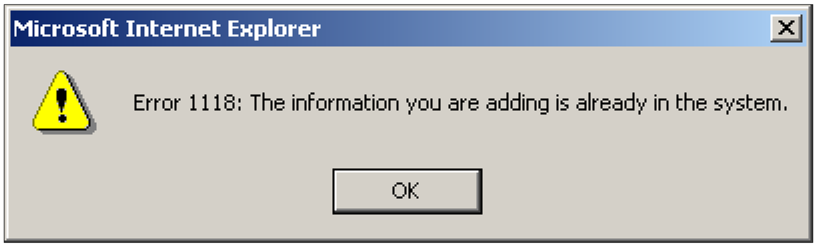
5. Click the **Add Operator** button to save the data.

    - After the **Add Operator** button is pressed, the Operator Information fields will be cleared for the next new operator (until the screen is closed).

6. The saved Operator will appear in the New Operator table.

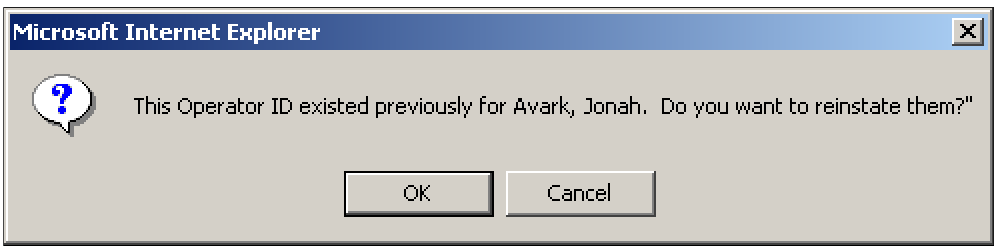
Warning Message

If you attempt to add an operator who is already in the system, the following message is displayed (No two operators in the same Facility can have the same Operator ID):



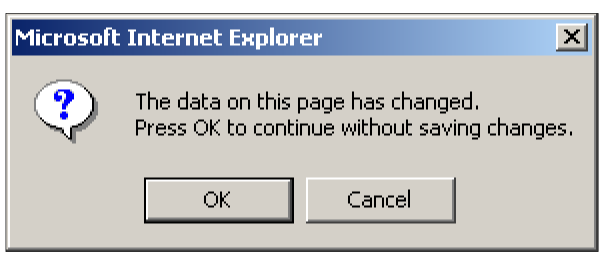
- Click **OK** to enter alternative data for the new operator.

If you re-add a deleted operator, the following message is displayed:



- *Click **OK** re-add the operator.*
- *Click **Cancel** to return to the New Operator screen.*

If a different menu option is selected before saving the new or edited operator information, the following warning message is displayed:



- Click the **OK** button to cancel the data entered.
- Click the **Cancel** button to clear the message and return to the **Edit Operator** screen to save the data.

If a ***required*** field is missing when the new operator information is saved, the following warning message is displayed indicating the specific required field (First Name, Last Name, and Operator ID) that is missing:

- Click the **OK** button to clear the message and enter the required information.

If the ***required*** field for Home Location is not entered for a **New Operator** the following warning message is displayed:

- Click the **OK** button and select a Location from the Tree.

If data entered in the Certification Date or Expiration Date fields is not valid, the following warning message is displayed, indicating the field that requires valid data:

- Click the **OK** button to clear the message and enter the valid information.

If the Expiration Date selected is earlier than yesterday's date, the following error message is displayed:

- Click on the **OK** button to clear the message.

New Operator table

The added operators will be displayed in a table in the bottom half of the **New Operator** screen.

The Action Bar will have the following buttons: **Edit**, **Delete**, **(Re)Certify** and **E-Mail**. These actions are described in the Operator Certification screen section.

Operator Certification Screen

Operators>>Certification

The **Operator Certification** screen allows you to search operators by Last Name, ID or certification information and to re-certify the operators.

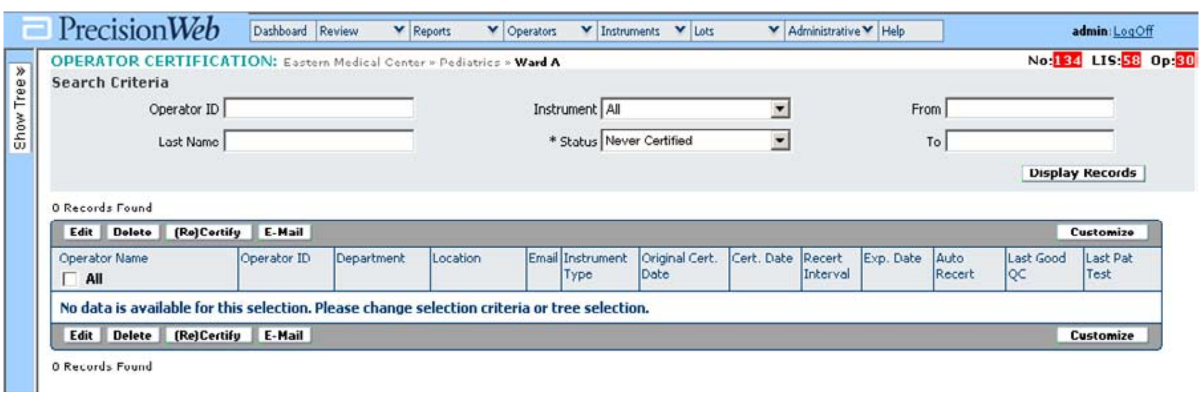
The data in the Expiration Certification Date column will be highlighted (white text on red background) for expired operator certifications.

To **view** the Operator Certification screen:

1. Move the mouse cursor over **Operators** to display the menu options.
2. Click on the **Certification** option.

   The **Operator Certification** screen displays the Operator Certification table with operators based on the location highlighted in the Tree. The default Instrument type is **All**, and the default Status is **Never Certified**.

   To display operators at a *different location* using the same search criteria, click on a **Facility**, **Department** or **Location** in the Tree.



Using the Search Criteria

Use the search criteria to find a specific operator or to find all operators with an instrument certification set to expire on a specific date.

To **find** an operator, fill in the following search criteria and click the **Display Records** button:

Criteria	Options	Description
Operator ID		Enter ID number
Last Name		Enter operator name
Instrument		Default is **All**. Selecting **All** will display operators for any instrument. Or, select a specific instrument type.

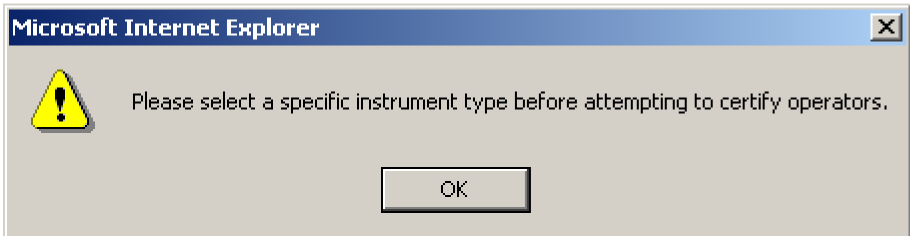
> ***Notes:***
> - *There may be multiple rows per operator, one per instrument.*
> - *The screen query will be re-executed and the screen will be refreshed automatically whenever the Instrument dropdown is reselected*

***Status**	Never Certified	Use to select new operators that have never been certified. (Default) Both date fields are disabled.
	Expiration	Both date fields are enabled. Enter an expiration date to select operators with expired certifications, or Enter or select a date range to select operators whose certifications have expired between specific dates using calendar pop-ups in **From** and **To** fields.
	No Selection	Select all operators (except deleted operators) regardless of certification status. Both date fields are disabled.
From		Click on to select beginning of date range. Only enabled if **Expiration** Status is selected, above.
To		Click on to select end of date range. Only enabled if **Expiration** Status is selected, above.

- The operators that match (or are similar to) the search criteria will be displayed in the Operator Certification table.
- To display operators at a different location using the same search criteria, click on a **Facility**, **Department** or **Location** in the Tree.

Warning Message

If you click the **Edit** button when **All** is selected from the Instruments dropdown list in the Search Criteria, the following message is displayed:

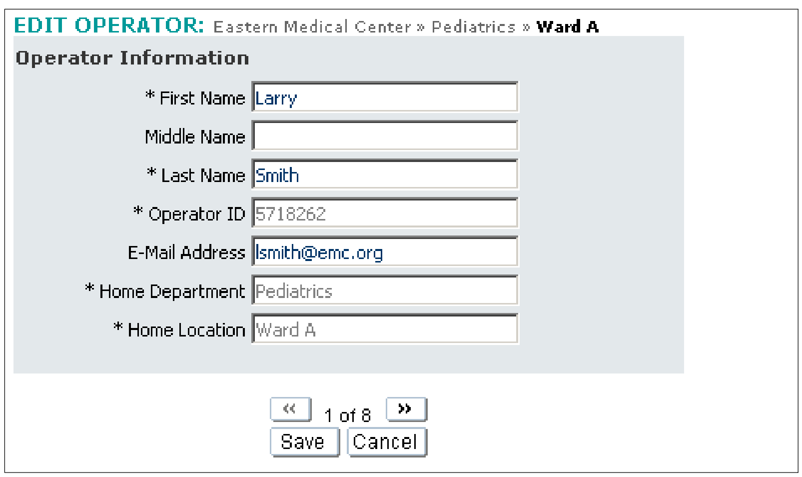


- Click OK to return to the Operator Certification screen and select a specific Instrument from the dropdown list in the Instrument field.

Edit Operator Records

To **edit** a single, multiple or all operator records:

1. Select one or more records from the table by clicking the box(es) in the **Operator Name** column. Alternatively, click the box marked **All** in the Operator Name column header to edit all records.
2. Click the **Edit** action button.



- The **Edit Operator** screen appears with the first selected record.
- If multiple records are selected, each record is displayed on a separate page.

3. Edit the Operator information.

** First Name, Last Name, Operator ID, Home Department and Home Location are **required** entry fields.*

- Operator ID is displayed but is not an editable field.
- To assign the operator to a different location, click on a Location in the Tree. This will automatically update the Home Location and associated Home Department fields

Note:
An operator can be moved to a different Home Location in the same Facility. An operator cannot be moved to a different Facility. To move an operator to a different Facility a New Operator record must be added under the new Facility. The operator may be added to a new Facility with the same ID number, provided the ID number is not currently assigned to another operator.

4. Click the **Save** button to save the data or Click the **Cancel** button to cancel the edit action without saving.

Warning Message

If a different Facility is selected in the Edit Operator screen, the following error message is displayed:

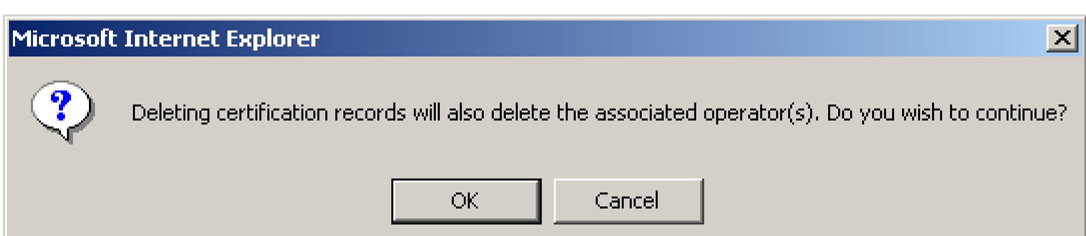
- Click the **OK** button to clear the message.
- Select a Home Location in the operator's current Facility.

Delete an Operator

The **delete** button will hide all records for the selected operator(s), including the operator's identity and all certification information for the operator(s).

To **delete** a single operator record or multiple operator records:

1. Click the box(es) in the Operator Name column.
2. Click the **Delete** action button.
3. The following dialogue box appears:



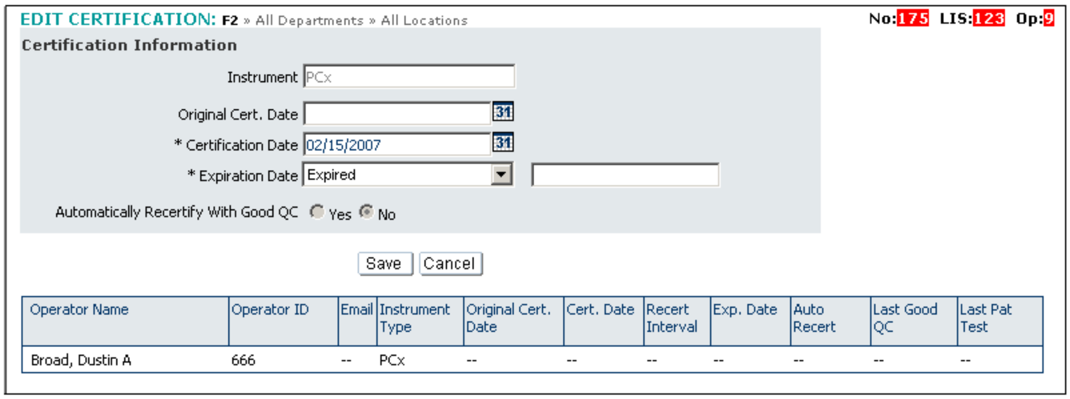
4. Click **OK** to delete the record(s) and return to the **Operator Certification** screen, or click **Cancel** to return to the **Operator Certification** screen without deleting the record(s).

> ***Note****: If you delete an operator record, this operator and all associated certifications will be flagged as deleted in the database. Test results completed by the deleted Operator are still accessible after the Operator has been removed. The Operator information will still be visible as part a of a historical test record. However, the Operator information will no longer be visible on the Operator list and the Operator ID number is no longer an active ID number.*

Re(Certify) an Operator

To certify or re-certify a single operator or multiple operators in a batch:

1. Select one or more operators from the table by clicking the box(es) in the **Operator Name** column.
2. Select the desired instrument type certification from the Instrument dropdown list in the Operator Certification section.
3. Click the **Re(Certify)** action button.



4. Select the following operator certification options:

Options	Description
Original Cert. Date	Enter the date the operator was first certified. Calendar allows you to select correct date. Selected value will appear in the Original Certification Date field.
***Certification Date**	Enter the date of the current (re)certification. Calendar allows you to select correct date. Selected value will appear in the Certification Date field.
Expiration Date	Select from: 3 months 6 months 12 months Never Expire Specify Expired (default) Choosing **"Specify"** will activate the box to the right of the **Expiration Date** field.
Automatically Re-certify With Good QC	Select Yes or No (default). These buttons become active only when a specific interval is selected from the Expiration Date.

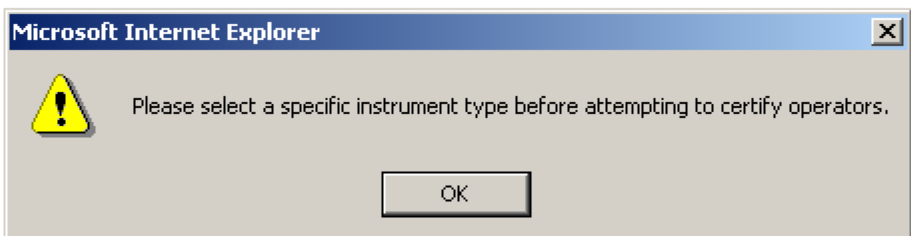
Options	Description
	Selecting Automatically Re-certify With Good QC will change an Operator's Certification Date from the current date to the date of the passing QC test (low and high), thus extending the Operator's certification date. The defined Recertification Interval remains unchanged. Each time the Operator completed passing QC the Certification Date will be updated.

5. Click the **Save** button to certify the selected operator(s) for the selected instrument and return to the **Operator Certification** screen or Click the **Cancel** button to return to the **Operator Certification** screen without saving.

> ***Note:*** *In order to certify an operator for another instrument, you need to change the selection in the Instrument dropdown field.*

Warning Message

If you click the **Re(Certify)** button when **All** is selected from the Instruments dropdown list in the Search Criteria, the following message is displayed:



- Click **OK** to return to the **Operator Certification** screen and select a specific Instrument from the dropdown list in the Instrument field.

E-Mail Operator Certification Records

To **e-mail** a single operator record or multiple operator records:

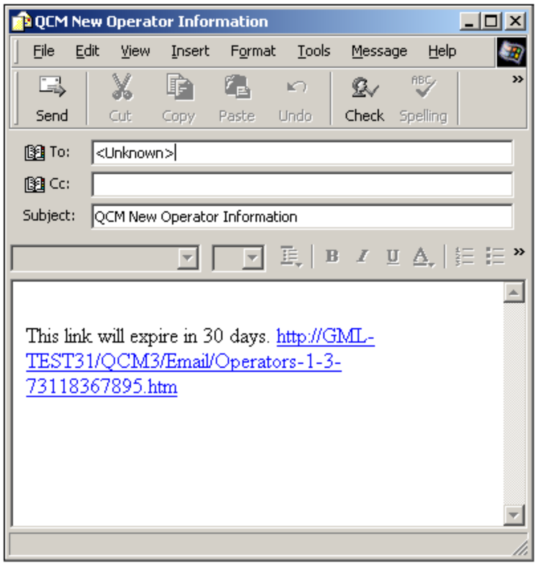
1. Select one or more records in the table by click on the box(es) in the Operator Name column.
2. Click the **E-Mail** action button.

To **e-mail** all Operator records:

1. Click on the box marked **All** in the Operator Name column header.
2. Click the **E-Mail** action button.

The default e-mail client opens a new mail message and includes the menu option title in the subject field.

- The body of the message includes a hyperlink to an .htm file that contains the selected records. Linked files will expire after 30 days.



Operator Search Screen

Operators>>Search

The **Operator Search** screen allows the user to find, edit, delete and e-mail operator information only. These action buttons are described in the Operator Certification section. This screen also allows the user to assign an operator to a different Home Location. Certification information (Operator ID, Instrument Certification) cannot be updated from this screen.

To **view** operator(s):

1. Move the mouse cursor over **Operators** to display the menu options.
2. Click on the **Search** option.

The **Operator Search** screen displays the Operator table based on the location highlighted in the Tree.

To display operators at a different location using the same search criteria, click on a **Facility**, **Department** or **Location** in the Tree.

Using the Search Criteria

To **find** an operator:

1. Enter a **Last Name** and/or an **Operator ID** in the entry fields.
2. Click the **Display Records** button.

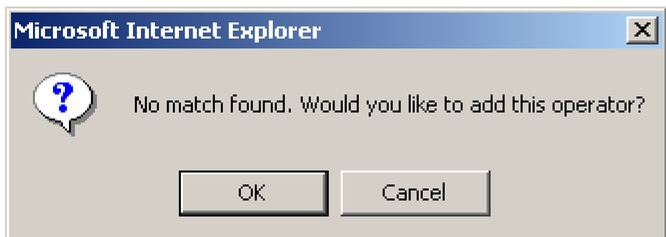
The **Operator Search** screen displays the Operator table based on results that match or are similar to the Last Name and/or Operator ID entered and the location highlighted in the Tree.

To find operators at a different location using the same search criteria, click on a **Facility**, **Department** or **Location** in the Tree.

Operator Certification Information is not displayed on the operator search screen.

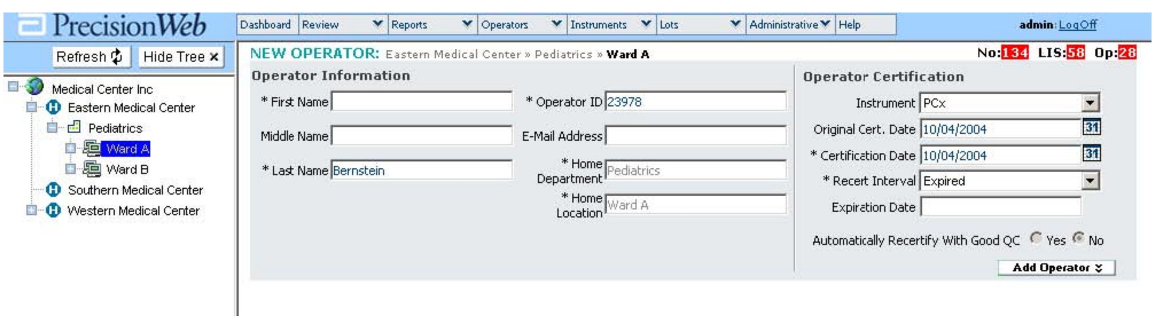
Warning Messages

If no match is found for the Last Name and/or Operator ID entered in the Operator Search screen, the following message is displayed:



- Click the **OK** button to add the operator.
- Click the **Cancel** button to clear the message.

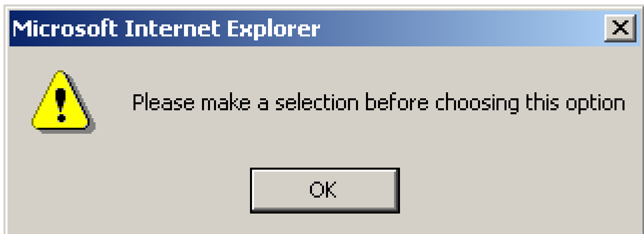
If the user clicks the **OK** button to add the operator, the application opens a **New Operator** screen with the Last Name and/or Operator ID entered in the **Operator Search** screen. The Location highlighted in the Tree is displayed in the Home Location field.



- Enter the required fields.
- Click the **Add Operator** button.
- The **Operator Search** screen appears again with the new operator displayed in the Operator table.

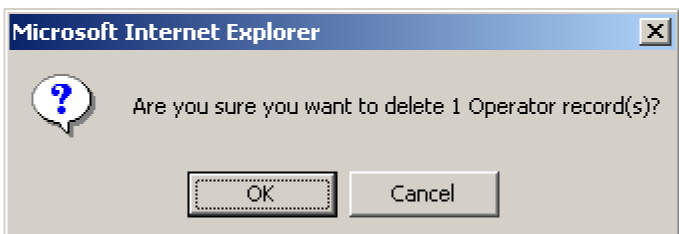
***Note**: When you are presented with the **New Operator** screen as a result of searching for a non-existent operator in the **Operator Search** screen the New Operator screen will not display a Table. After you have entered the new operator's information and hit the **Add** button, you will return to the **Operator Search** screen rather than seeing the new operator presented in the New Operator screen.*

If records are not selected from the table before clicking the **Edit**, **Delete** or **E-Mail** action button the following warning message is displayed:



- Click the **OK** button to clear the message and make a selection.

If an operator record is selected for deletion, the following warning message is displayed:



- Click the **OK** button to delete the operator records.
- Click the **Cancel** button to cancel the delete action.

***Note:** The delete action will flag the operator record as deleted and the operator will not appear on the Operator table. The test results associated with the operator will remain intact for data integrity and reports.*

7. Instruments

Instruments Overview

The **Instruments** menu option provides access to three screens for use in managing instrument settings and two screens with log files. The **Configuration** screen allows you to configure instrument settings. The **Comments** screen allows you to define comment codes by instrument type. The **Ports** screen allows you to manage instrument communications. The **Tracking Log** screen allows you to review events relating to instrument location assignments. The **Upload Log** screen allows you to review instrument communication session results. Each screen is available only if your account was granted this permission by the Administrator or POCC.

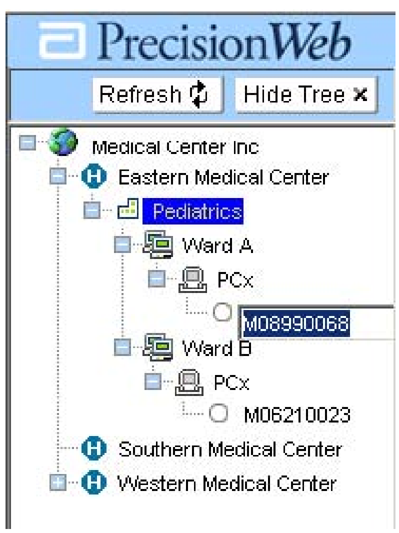
Moving, Renaming and Deleting Instruments

The first time a **new** instrument uploads data to the system the instrument serial number appears in the Tree under an **instrument type icon** () in the **Location** from which the instrument was uploaded.

Instruments are grouped by **Location** under **instrument type icons**.

For example in the illustration below the **Department**, Pediatrics, includes:

Two **Locations** (Ward A and Ward B) each with a PCx instrument icon () and one instrument assigned to each location (M08990068 and M06210023, respectively).



Instruments visible on the Tree can be moved, renamed and deleted.

Only users assigned the Instrument Operations Function Permission can move, rename or delete an instrument.

Moving Instruments

- An instrument can be moved to a different Location in the same Facility via drag and drop.
- An instrument can be moved to a Location within a different Facility; however, this cannot be done via drag and drop.

To **move** an instrument within the same Facility:

1. Place the mouse cursor over the icon to the left of the instrument **serial number** or **name**.
2. Click and hold the left mouse button to drag the instrument to a new Location.
   - The cursor will appear as a four-arrow symbol.
   - When the mouse cursor changes from a four-arrow symbol to an arrow with a tag box, the instrument **can** be moved to that Location.
3. Release the mouse button to display the instrument in its new Location.
   - When the mouse cursor changes to a circle with a line through it, the instrument **cannot** be moved to that part of the Tree. An instrument can only be assigned to the Location level of the Tree.
   - An instrument cannot be assigned to the Facility or Department level of the Tree.
   - An instrument cannot be moved from a Location within one Facility to a Location within a different Facility via drag and drop.
4. Release the mouse button to display the instrument in its original Location.

To **move** an instrument to a different Facility:

1. Move the mouse cursor over **Instruments** to display the menu options.
2. Click on the **Configuration** option.
3. Select the current instrument Location in the Tree.
4. Change the Configuration Download setting to **Download Location** and click the **Save** button.
5. Select the new instrument Location in the Tree.
6. Change the Configuration Download Setting to **Download Location** and click the **Save** button.
7. Delete the instrument from its current Location in the Tree by highlighting the instrument in the Tree and selecting the Delete key on your keyboard.
8. Perform a control test and upload the instrument from the desired Location in the new Facility. This should be the same Location as identified in step 5 above.

- Upon upload the instrument will appear in Tree under the Location from which the instrument was uploaded in the new Facility.

9. Select the current instrument Location in the Tree. This should be the same Location as identified in step 5 above.

10. Click the Default button to return the Location back to the Assigned Location setting. **Do not click the Save button.**

11. Select the instrument's previous Location in the Tree. This should be the same Location as identified in step 3 above.

12. Click the Default button to return the Location back to the Assigned Location setting. **Do not click the Save button.**

Notes:

- *When an instrument is moved to a Location that does not have any other instruments of that type, the system creates a new or additional **instrument type icon** for that Location.*

- *When an instrument is moved from a Location where it is the only instrument of that type, the system removes the **instrument type icon** from that Location.*

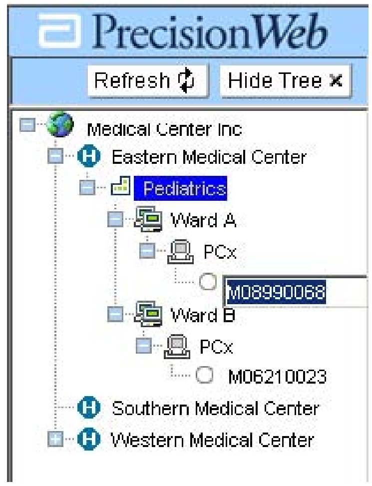
- *Saving a configuration setting at the Location level of the Tree will break the Parent-Child relationship. Therefore, it is important to select the Default button for each Location (previous and new) after the instrument appears in the new Facility.* *See Re-establishing the Parent-Child Relationship for more information.*

Renaming Instruments

To **rename** an instrument:

1. Place the mouse cursor over the instrument's **serial number** or **name** text and double click the left mouse button.

    - The serial number or name text changes from read-only to an editable text box.



2. Type the new instrument name and press the keyboard **Enter** key or click the left mouse button anywhere outside the text box to display the new instrument name in the Tree.

3. To cancel the rename action, press the keyboard **Esc** key on your keyboard to turn the editable text box back to read-only text. The instrument name remains unchanged in the Tree.

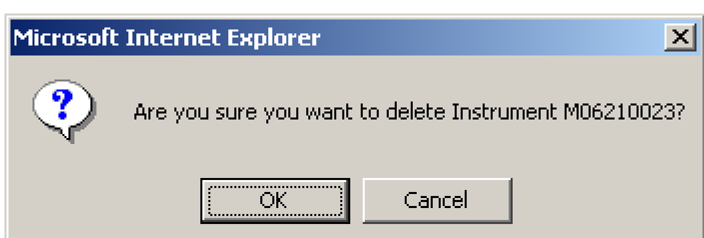
> ***Note**: If the serial number is replaced with text (you can leave the serial number and add text) the instrument serial number is visible in the Instrument Serial No. column with all test results. The Instrument Name column will display the name entered in the Tree (serial number and/or text).*

Deleting Instruments

To **delete** an instrument:

1. Place the mouse cursor on the **serial number** or **name** text, click the left mouse button to highlight the instrument, and press the keyboard **Delete** key.

   The following **warning message** is displayed:



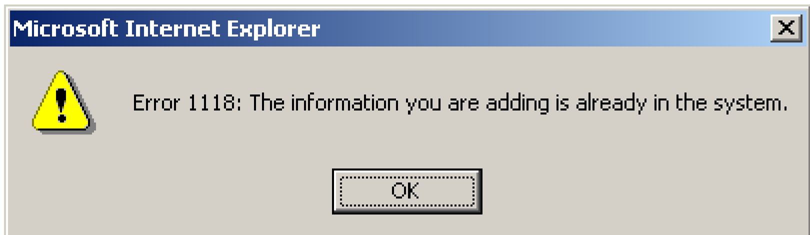
2. Click the **OK** button to delete the instrument.

3. Click the **Cancel** button to cancel the delete action.

Notes:
The instrument record is flagged as deleted and the instrument is removed from the Tree. If the instrument has data in the live database, the test result data remains intact for data integrity and reports. If the instrument flagged as deleted uploads data at a later time, the instrument will reappear in the Tree in the Location from which it was uploaded. The Instrument name and serial number are both saved in the database.

Warning Messages

1. If the instrument name entered already exists for an instrument of the same type at the same location and it has not been flagged as deleted, the following error message is displayed:



- Click the **OK** button to clear the message.

2. If the instrument name field is cleared during the rename action the following error message is displayed:

- Click the **OK** button to clear the message.

Instrument Configuration Screens

Instruments>>Configuration

The **Instrument Configuration** screens allow the POCC to view and edit instrument configuration data for a specific location. Instruments can be configured for the entire Organization or an individual Facility, Department or Location.

This section of the user manual contains full information for configuring the Precision PCx Blood Glucose Monitoring System and limited information on Test ID mapping for the i-Stat 1 Analyzer. Please refer to the documentation provided with the i-Stat 1 Analyzer or other installed instrument type for full instrument configuration options.

Location Tree Parent-Child Relationship

The Location Tree is made up of one or more Facilities and associated Departments and Locations. Each level of the Tree is linked to the level above. This is known as the Parent-Child relationship. The Organization level is a Parent Level. The Location level is a child of the Department level. Facilities and Departments can be either a Parent or Child.

Organization	Parent to all Facilities within the Organization
Facility:	Parent to all Departments within the Facility, Child to the Organization
Department:	Parent to all Locations within the Department, Child to the associated Facility
Location:	Child to the associated Department

Instrument Configuration and the Parent-Child Relationship

Instrument configuration settings saved at the top level of the Tree affect all sub-levels. For example, configuration settings saved at the Organization (parent) level will be applied to all Facilities and associated Departments and Locations.

Instrument configuration settings saved at a lower level of the Tree affect only the levels below the selected level of the Tree. For example, configuration settings saved at the Department level will be applied to all Locations (child) associated to the Department (parent). Settings saved at the Location level affect only the selected Location.

It is recommended that instrument configuration settings be made at the Facility level when possible. Department level settings should then be used to vary the instrument configurations only as needed. The Organization level settings then remain available for reference as default values.

Note: *It is important to note the selected Tree level prior to saving instrument configuration settings to ensure the settings are applied to the appropriate locations.*

Breaking the Parent-Child Relationship

Saving instrument configuration for a lower level of the Tree (i.e. Department or Location) will sever the relationship between the child and its parent level on the Tree.

Breaking the Parent-Child relationship is necessary to enable configuration settings different from the global Organization or Facility settings (i.e. certain locations may require an Action Range different from the majority of the Organization or Facility).

Once a location is disassociated to its parent location, any changes to Instrument Configuration will need to be made independent of the parent location.

Identifying a Broken Parent-Child Relationship

There is no visual indication in the Tree that the relationship between a child location and its parent has been broken. To identify the locations that are no longer linked its parent run the Instrument Configuration report from the QCM default report suite. This reports Organization, Facility, Department or Location specific instrument settings. The first page of the report identifies instrument settings applied to the entire Organization (associated Facilities, Departments and Locations). Subsequent locations listed on this report are no longer linked to its parent location in the Tree.

Re-establishing the Parent-Child Relationship

If the Parent-Child relationship was severed in error or the configuration settings for a location should be the same as its parent, the child location can be reattached to its parent location by highlighting the child location in the Tree and selecting the Default button (located to the right of the Save button) on the Instrument Configuration screen.

To re-establish the Parent-Child relationship:

1. Move the mouse cursor over **Instruments** to display the menu options.
2. Click on the **Configuration** option.
3. Select the child location in the Tree.
4. Click the **Default** button on the Instrument Configuration screen.

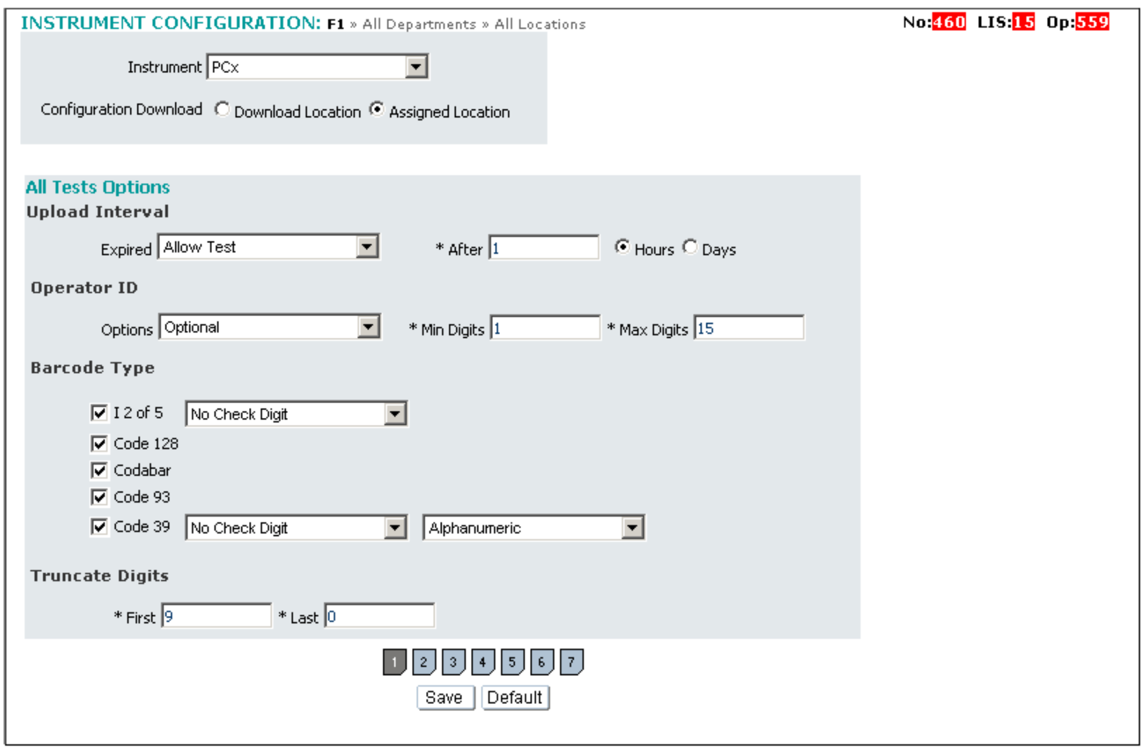
> ***Note**: Clicking the Save button will break the parent-child relationship. Do not click the Save button after clicking the Default button.*

Configuring Instrument Settings for Precision PCx

To **view** the Instrument configuration screens for Precision PCx:

1. Move the mouse cursor over **Instruments** to display the menu options.
2. Click on the **Configuration** option.
   - The **Instrument Configuration** screen displays the first of seven pages used to configure the instruments for a Location.
   - Each instrument configuration page displays the corresponding page number icon highlighted at the bottom of the screen.
   - The Instrument Configuration pages are titled as follows:

Page 1	All Test Options
Page 2	Patient Test Options
Page 3	Control Test Options
Page 4	Security Options
Page 5	Profile Options
Page 6	Test Type Options
Page 7	System Options



The **Configuration Download** option appears on all seven Configuration screens. The Download Location or Assigned Location option selected on any of the seven screens applies to all configuration screens.

Setting	Options	Description
Configuration Download	O Download Location	Click on the **Download Location** button to automatically reconfigure an instrument to match the instruments at the Location from

Setting	Options	Description
		which the instrument is uploaded. The application will download the instrument configuration settings and lists (Operator and Reagent) assigned to the Location from which it is uploaded. All test results uploaded from the instrument will be assigned to the instrument's download Location in the Tree.
	O Assigned Location	Click on the **Assigned Location** button to retain the instrument's original configuration regardless of the Location from which the instrument is uploaded. All test results uploaded from the instrument will be assigned to the instrument's assigned Location in the Tree, regardless of the Location from which the test results were uploaded.

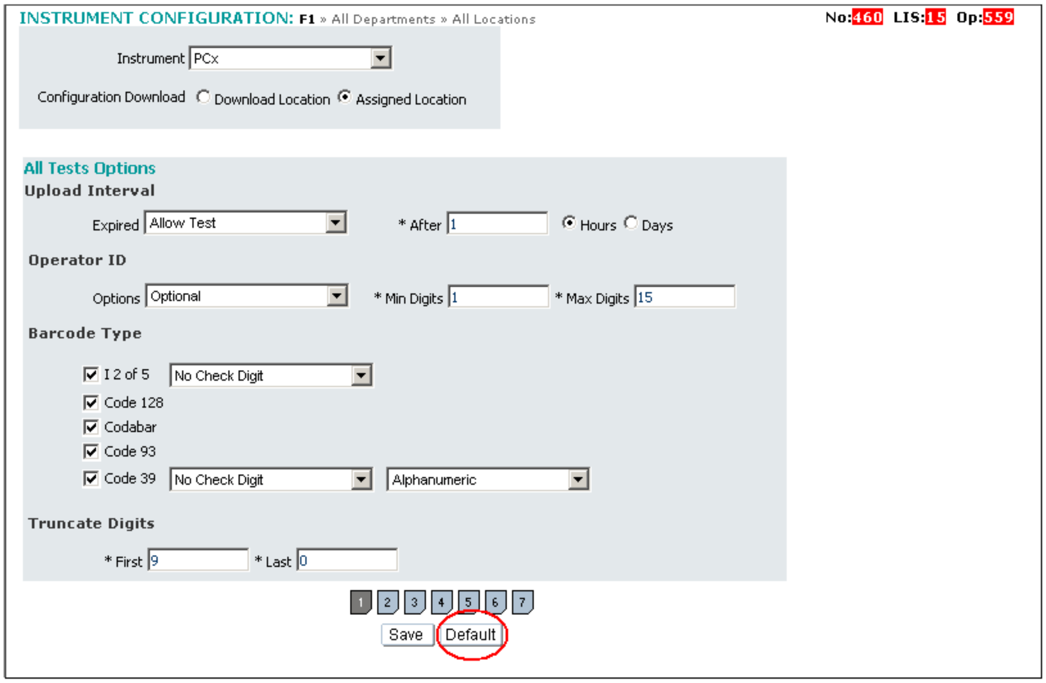
The **save** and **default** buttons also appear on all seven screens.

- Click the **Save** button to save the data.
- Click the **Default** button to apply the parent configuration settings for **All Tests Options** to the selected location in the Tree. This button will re-establish the Parent-Child relationship and apply the parent's configuration settings to the child location (which may not necessarily be the system default settings).

> ***Note:*** *You do not need to select the Save button for each configuration page. You can move from page to page within Instrument Configuration without selecting Save and the changes will be saved. Once you have entered all configuration settings select the Save button to apply the settings to the highlighted Tree Location. This behavior also applies to the Default button.*

All Tests Options

Page **1** of the **Instrument Configuration** screen displays the system default settings for **All Tests Options**.



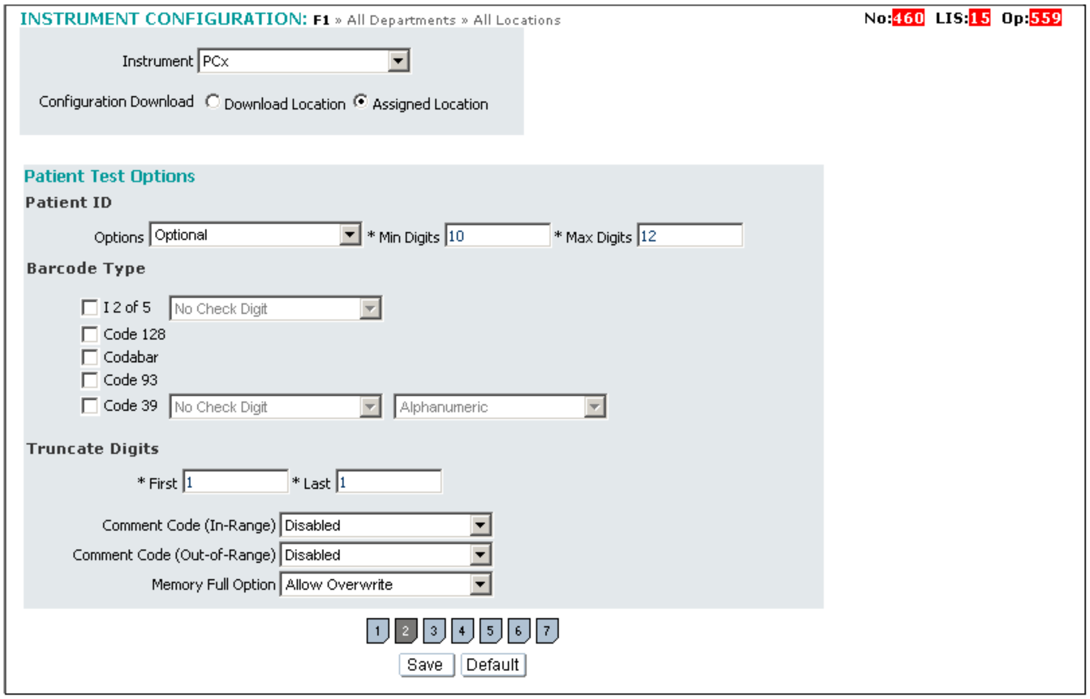
The available options on the **All tests Options** configuration page are:

Setting/Options	Description
Upload Interval	
Expired	Select the time interval that will activate the instrument upload expiration settings and select: **Allow Test**, **Warn** or **Lockout** from the dropdown list.
***After**	O Hours O Days Enter a value for the time interval and click on the Hours or Days button.
Operator ID	
Options	Select **Disabled**, **Optional** or **Required** from the dropdown list. If **Required** or **Optional** is selected, enter the minimum and maximum digits required for Operator ID (the maximum digits for an Operator ID is 15 characters). The maximum and minimum digits fields are ***required***.
Barcode Type	Select the Operator ID Barcode Type.
Truncate Digits	To ignore any beginning and/or ending values, specify the digits to truncate in the Operator ID.

** **After**, **Min Digits** and **Max Digits** are required entry fields on the **All Tests Options** screen.*

Patient Test Options

Page **2** of the instrument configuration screen displays the system default settings for **Patient Test Options**.



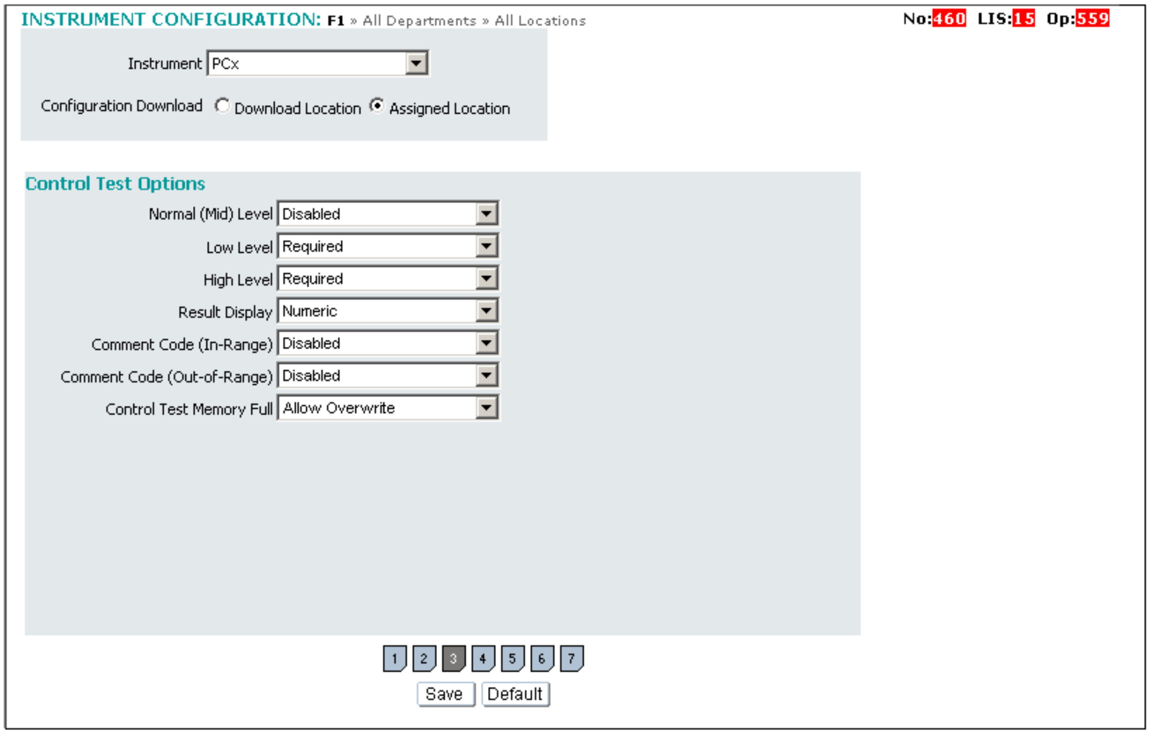
The available options on the **Patient Test Options** configuration page are:

Options	Description
Patient ID	
Options	Select **Disabled**, **Optional** or **Required** from the dropdown list. If **Required** or **Optional** is selected, enter the minimum and maximum digits required for Patient ID (the maximum digits for Patient ID is 15 characters). The maximum and minimum digit fields are ***required***.
Barcode Type	Select the Patient ID Barcode Type.
Truncate Digits	To ignore any beginning and/or ending values, specify the digits to truncate in the Patient ID.
Comment Code (In-Range)	Select an option for the In-Range Comment Code: **Disabled**, **Optional** or **Required.**
Comment Code (Out-of-Range)	Select an option for the Out-of-Range Comment Code: **Disabled**, **Optional** or **Required.**
Memory Full Option	Select an option for when the instrument's memory is full: **Lockout**, **Prompt for Overwrite** or **Allow Overwrite.**

** **Min Digits, Max Digits, First** and **Last** are required entry fields on the **Patient Test Options** screen.*

Control Test Options

Page **3** of the instrument configuration screen displays the system default settings for **Control Test Options**.



The available options on the **Control Test Options** configuration page are:

Setting/Options	Description
Normal (Mid) Level	Select the **Disabled** or **Required** option for the instrument to prompt for the specified control level.
Low Level	Same as above.
High Level	Same as above.
Result Display	Select the **Numeric** or **Pass/Fail** option for the control test result display.

Note: *If the Pass/Fail option is selected the instrument will display the result as Pass or Fail, however, the actual numeric value of the Pass/Fail control test result will be uploaded and displayed in the application.*

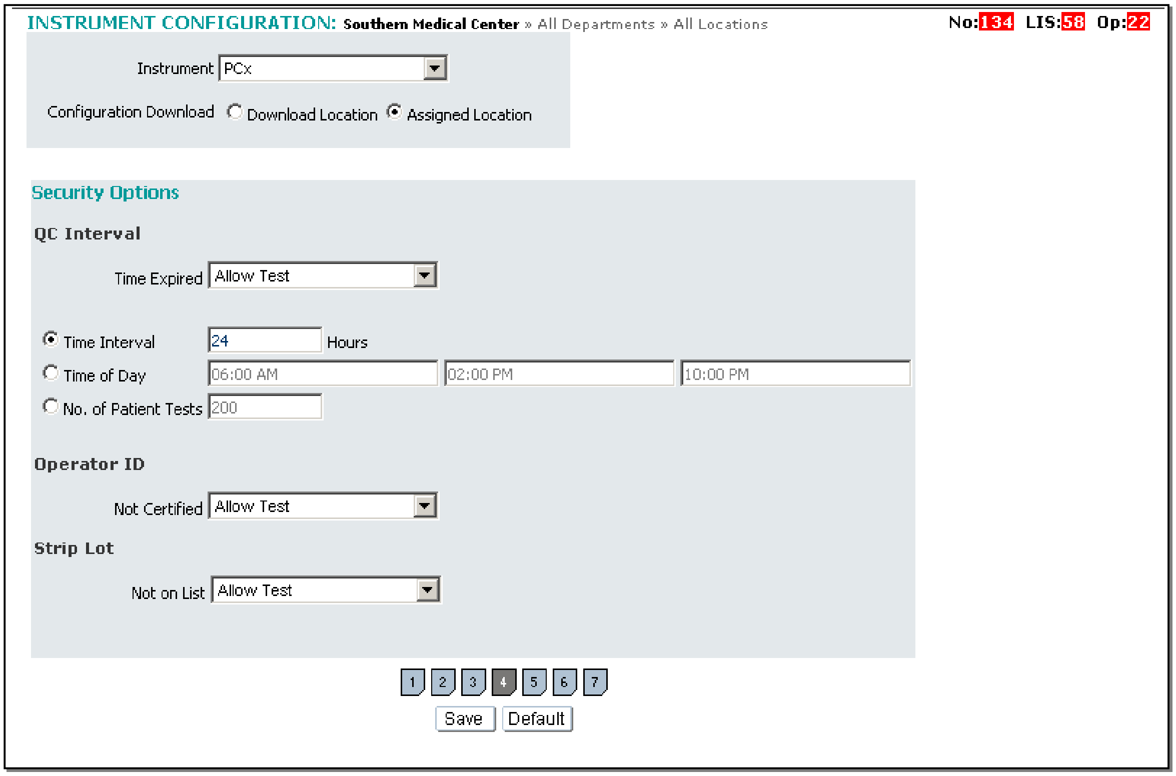
Comment Code (In-Range)	Select an option for the In-Range Comment Code: **Disabled**, **Optional** or **Required.**
Comment Code (Out-of-Range)	Select an option for the Out-of-Range Comment Code: **Disabled**, **Optional** or **Required.**
Control Test Memory Full	Select an option for when the instrument's control test memory is full: **Lockout**, **Prompt for Overwrite** or **Allow Overwrite.**

- Click the **Save** button to save the data.

- Click the **Default** button to apply the parent configuration settings for **Control Test Options** to the selected location in the Tree. This button will re-establish the Parent-Child relationship and apply the parent's configuration settings to the child location (which may not necessarily be the system default settings).

Security Options

Page **4** of the instrument configuration screen displays the system default settings for **Security Options**.

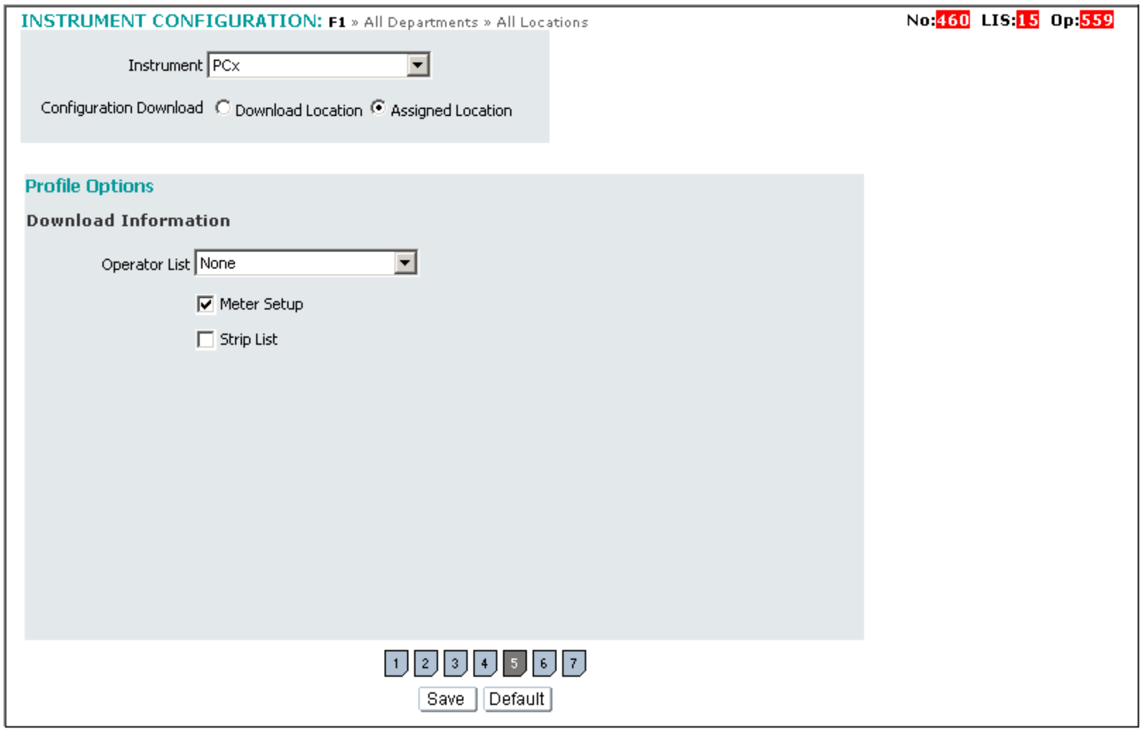


The available options on the **Security Options** configuration page are:

Setting/Options	Description
QC Interval	
Time Expired	Select the **Allow Test**, **Warn** or **Lockout** option for the QC test interval expired security setting.
Time Interval	Select the **Time Interval**, **Time of Day** or **No. of Patient Tests** to activate the QC test interval expired security setting. 1. Enter the interval in hours for the Time Interval option, or 2. Enter up to three different times, such as, 06:00 AM, 02:00 PM and 10:00 PM for the Time of Day option, or 3. Enter a number between 1 and 250 for the No. of Patient Tests option
Operator ID	
Not Certified	Select the **Allow Test**, **Warn** or **Lockout** option for the operator ID not certified security setting.
Strip Lot	
Not On List	Select the **Allow Test**, **Warn** or **Lockout** option for the strip lot not on list security setting.

Profile Options

Page **5** of the instrument configuration screen displays the system default settings for **Profile Options**.

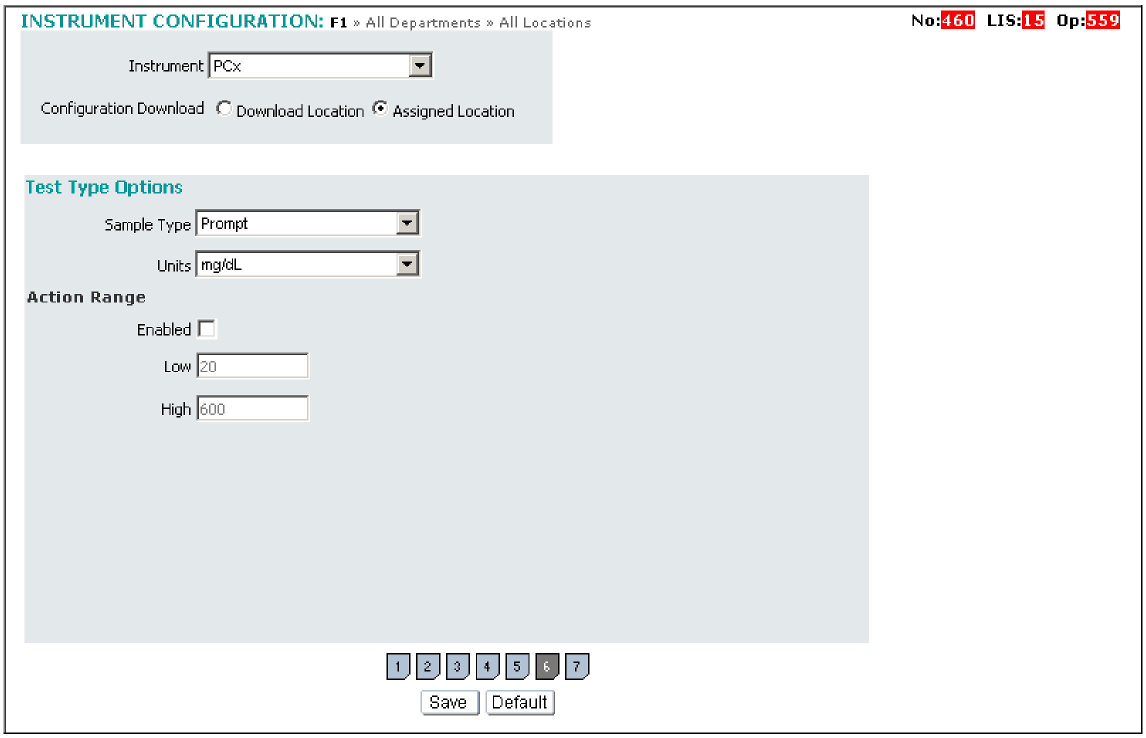


The available options on the **Profile Options** configuration page are:

Setting/Option	Description	
Download Information	Select one download option for downloading an operator list: None, Full List or Incremental List.	
Operator List	None	Select for no download to instruments.
	Full List	Select to download the full operator list.
	Incremental List	Select to download changes made since the meter's last upload.
	☐ **Meter Setup**	Check this option to download configuration setting to the instruments.
	☐ **Strip List**	Check this option to download the approved strip lot list to instruments.

Test Type Options

Page **6** of the instrument configuration screen displays the system default settings for patient **Test Type Options.**



The available options on the **Test Type Options** configuration page are:

Option	Description	
Sample Type	Specify the blood sample type used for patient testing and the measurement units.	
	Capillary or Arterial	Select if patient blood sample is capillary or arterial.
	Venous	Select if patient blood sample is venous only.
	Prompt	Select to choose the correct blood sample type prior to each patient test.
Units		Select **mg/dL** or **mmol/L.**
Action Range	Enable Action Range to prompt operators when a patient test result is outside the user-defined range.	
	Enabled	Check this option to enable the user-defined action range and specify the limit for **Low** and **High.**

> ***Note:*** *Changes made to the Low and High action ranges will only apply to test results completed since the change was downloaded to the instrument.*

Warning Messages

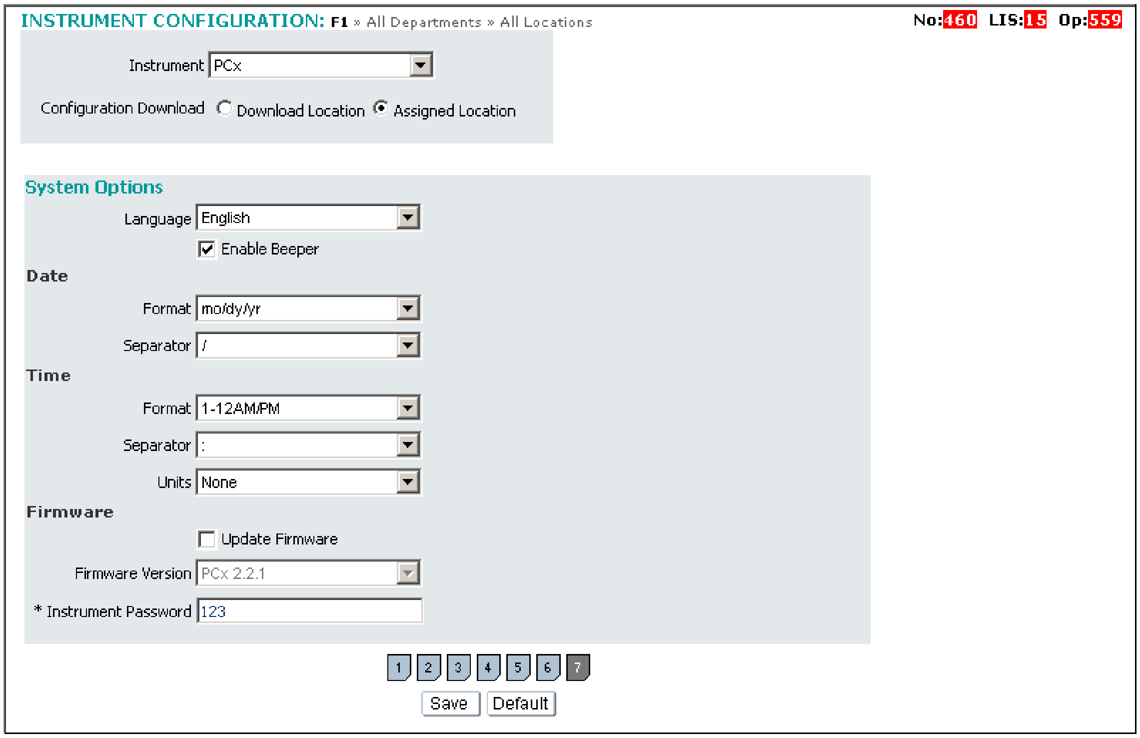
If **Enabled** is checked and there is no entry in the **Low** field, a warning message is displayed:

If **Enabled** is checked and there is no entry in the **High** field, a warning message is displayed:

- Click the **OK** button to clear the message and enter the required information.

System Options

Page **7** of the instrument configuration screen displays the system default settings for **System Options**.



The available options on the **System Options** configuration page are:

Language Select a language from the dropdown list.

Enable Beeper Click the checkbox to enable the beeper.

Date format Select the date format from the dropdown list.

Separator Select the separator to place between the date numbers.

Time format Select the time format from the dropdown list.

Separator Select the separator to place between the hours and minutes.

Units Select the unit for the time format from the dropdown list.

Update Firmware Click the checkbox to enable the firmware update option and select a Firmware Version from the dropdown list.

> ***Note:*** *See the meter component instructions for specific information about upgrading instruments.*

***Instrument Password** Enter the instrument password

** **Instrument Password is a** required entry field on the **System Options** screen.*

Configuring Test ID Mapping for i-STAT Portable Clinical Analyzer:

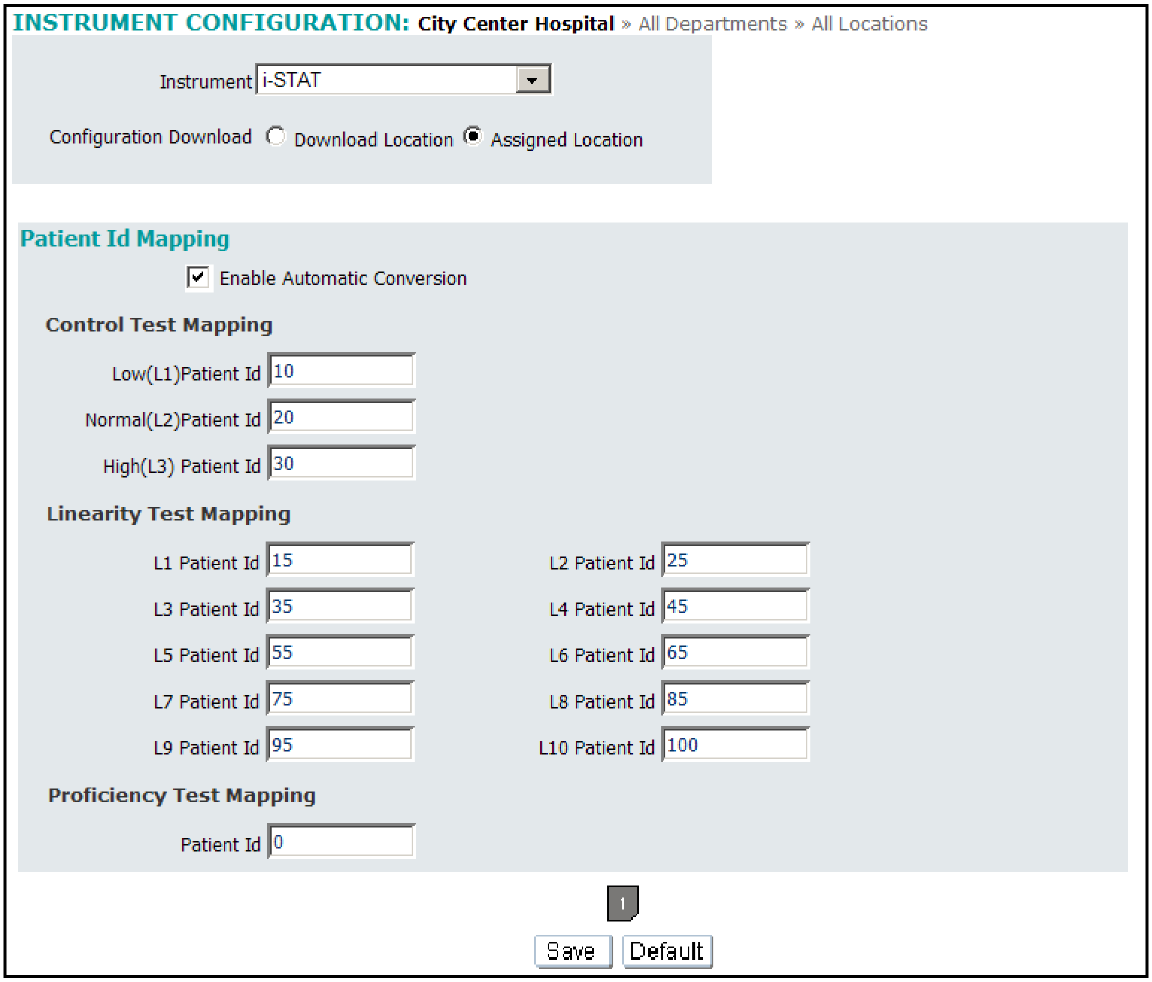
Specify the Patient ID used to identify control, proficiency and linearity tests run on the i-STAT PCA.

The Patient ID entered will be used to identify both the test type and level specified.

The Enable Automatic Conversion checkbox applies the ID setting to uploaded test results. If this box is not checked the ID's entered will not convert the test to the specified test type/level and the test result will appear as a patient test result.

To **view** the Test ID Mapping configuration screens for i-STAT PCA:

1. Move the mouse cursor over **Instruments** to display the menu options.
2. Click on the **Configuration** option.
3. Select i-STAT from the Instrument dropdown list,
   - The Patient Id Mapping screen will appear. Enter the desired Patient ID for each Test Type and Level.


INSTRUMENT CONFIGURATION: City Center Hospital » All Departments » All Locations
Instrument i-STAT
Configuration Download Download Location Assigned Location
Patient Id Mapping
Enable Automatic Conversion
Control Test Mapping
Low(L1)Patient Id 10
Normal(L2)Patient Id 20
High(L3) Patient Id 30
Linearity Test Mapping
L1 Patient Id 15
L2 Patient Id 25
L3 Patient Id 35
L4 Patient Id 45
L5 Patient Id 55
L6 Patient Id 65
L7 Patient Id 75
L8 Patient Id 85
L9 Patient Id 95
L10 Patient Id 100
Proficiency Test Mapping
Patient Id 0
1
Save
Default

Instruments Comment Code Screens

Instruments>>Comments

The **Instrument Comment Codes** screens allow you to add, edit and delete user-defined comment codes.

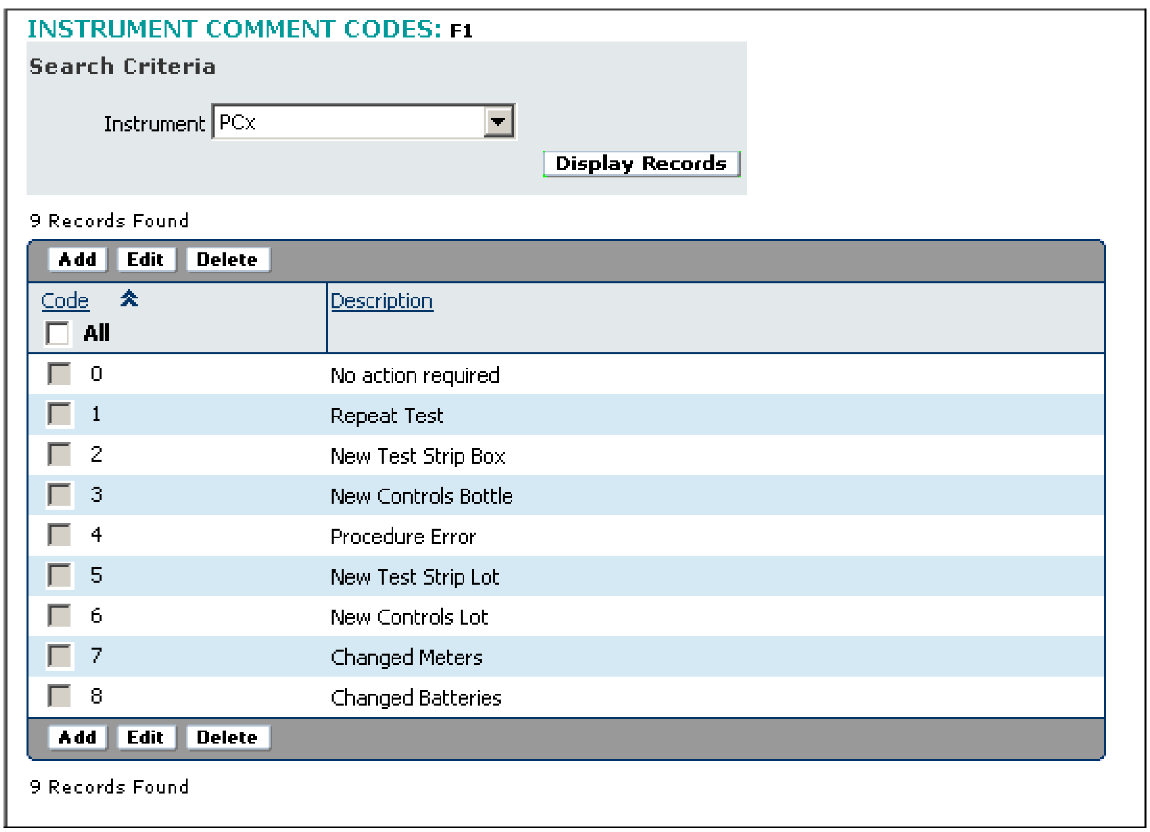
- Each Facility in the Organization maintains a separate list of user-defined comment codes.
- The PCx has predefined instrument comment codes that cannot be edited.

To **view** instrument and user-defined comment codes:

1. Move the mouse cursor over **Instruments** to display the menu options.
2. Click on the **Comments** option.

The **Instrument Comment Codes** screen displays the Comment Code table for the PCx with predefined instrument comment codes numbered 0 through 8 in read-only fields.

User-defined comment codes can be added, edited and deleted.



To **view** comment codes at a different location:

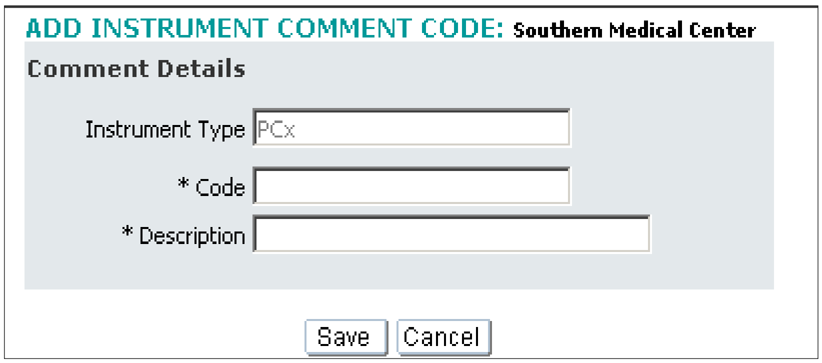
Click on a different **Facility** in the Tree.

Add a comment code

To **add** a user-defined comment code:

1. Click the **Add** action button.

   - The **Add Instrument Comment Code** screen displays the instrument type that was selected from the dropdown list in the **Instrument Comment Codes** screen before clicking the **Add** button.



   - Enter a Code number from 0 to 99,999 (PCx user defined comment codes start at 9) and a comment code description.

   - The instrument comment code list is used to associate a description to a comment code number for reporting purposes only. The instrument comment code list does not download to the specified instrument.

   * Code (number) and Description are ***required*** entry fields.

2. Click the **Save** button to save the data or Click the **Cancel** button to cancel the add action without saving.

Edit a comment code

To **edit** a single user-defined comment code or multiple user-defined comment codes:

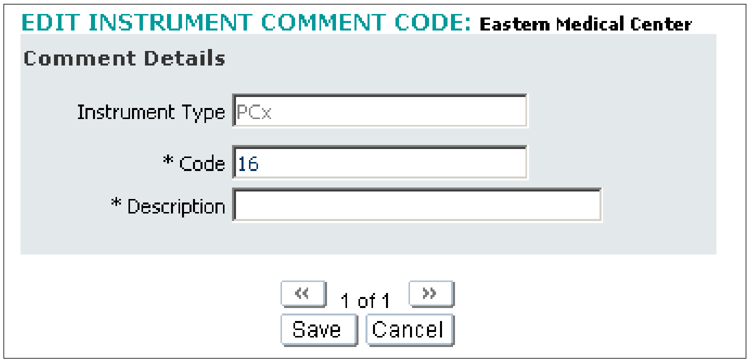
Note*: Default comment codes cannot be edited or deleted.*

1. Click the box(es) in the **Code** column.
2. Click the **Edit** action button.

To **edit** all user-defined comment codes:

1. Click the box marked **All** in the **Code** column header.
2. Click the **Edit** action button.

The **Edit Instrument Comment Code** screen appears with the information stored in the database for the first selected user-defined comment code record.



* Code (number) and Description are ***required*** entry fields.

3. Click the **Save** button to save the edited data or Click the **Cancel** button to cancel the edit action without saving.

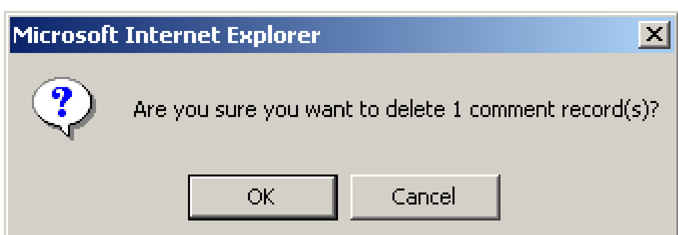
Delete a comment code

To **delete** a single user-defined comment code or multiple user-defined comment codes:

1. Click the box(es) in the **Code** column.
2. Click the **Delete** action button.

To **delete** all user-defined comment codes:

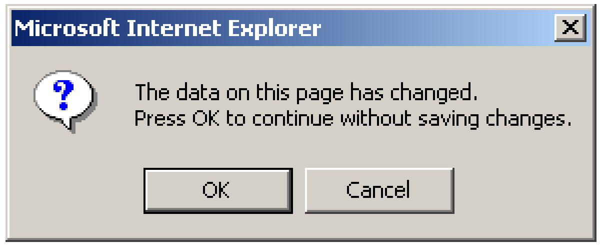
1. Click the box marked **All** in the code column header.
2. Click the **Delete** action button.
3. The following dialogue box appears:



4. Click **OK** to delete the record(s) or **Cancel** to return to the **Instrument Comment Codes** screen.

Warning Messages

1. If a different menu option is selected before saving the new or edited comment code record, the following warning message is displayed:

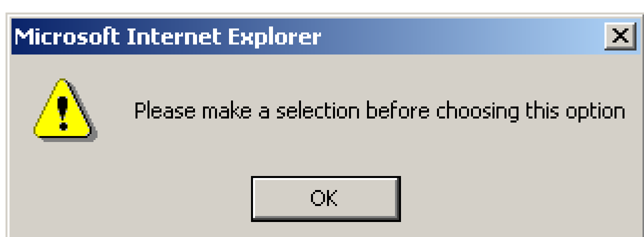


- Click the **OK** button to cancel the data entered.
- Click the **Cancel** button to clear the message and return to the **Instrument Comment Codes** screen to save the data.

2. If a ***required*** field is missing when the comment code information is saved, the following warning message is displayed with a reference to the specific required field (Code and/or Description) that is missing:

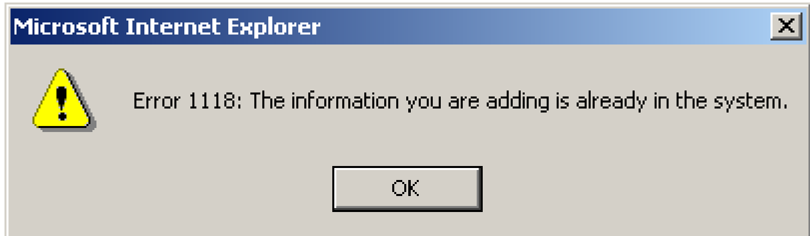
- Click the **OK** button to clear the message and enter the required information.

3. If comment code records are not selected from the table before clicking on the **Edit** or **Delete** action button, the following warning message is displayed:



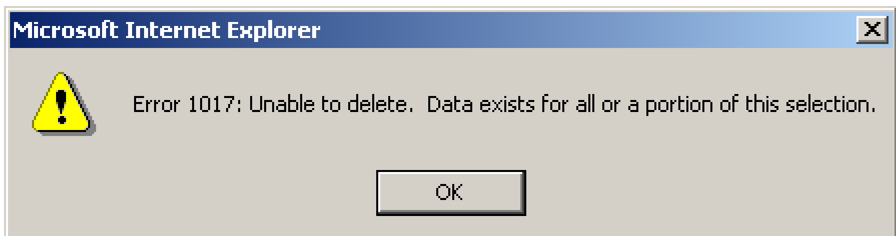
- Click the **OK** button to clear the message and make a selection.

4. If a Code is entered that is already in use, the following warning message is displayed:



- Click the **OK** button and choose a different Code that is not in use.

5. If you attempt to delete a comment with attached data, the following warning message is displayed:



Click the **OK** button to return to the Instrument Comment Code screen.

Instrument Port Assignment Screens

Instruments>>Ports

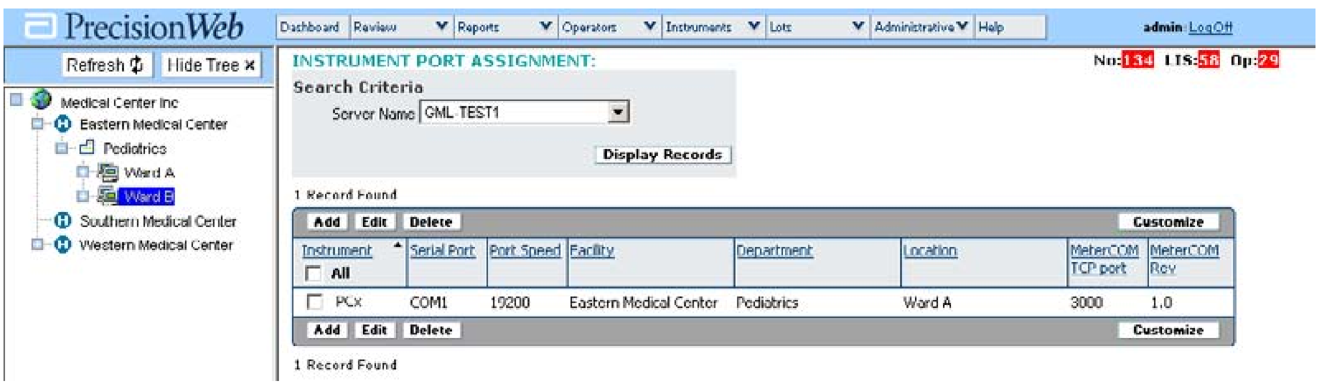
The **Instrument Port Assignment** screen allow you to view, add, edit and delete COM port assignments for instruments with a serial connection to the server.

Use the **Server Name** selection criterion to view COM port assignments for instruments with serial connections at the selected server.

To **view** instrument port assignments:

1. Move the mouse cursor over **Instruments** to display the menu options.
2. Click on the **Ports** option.
3. Click on a Location in the Tree.
4. Click the **Display Records** button.

The **Instrument Port Assignment** screen displays the information stored in the database for instruments with serial connections to the server.

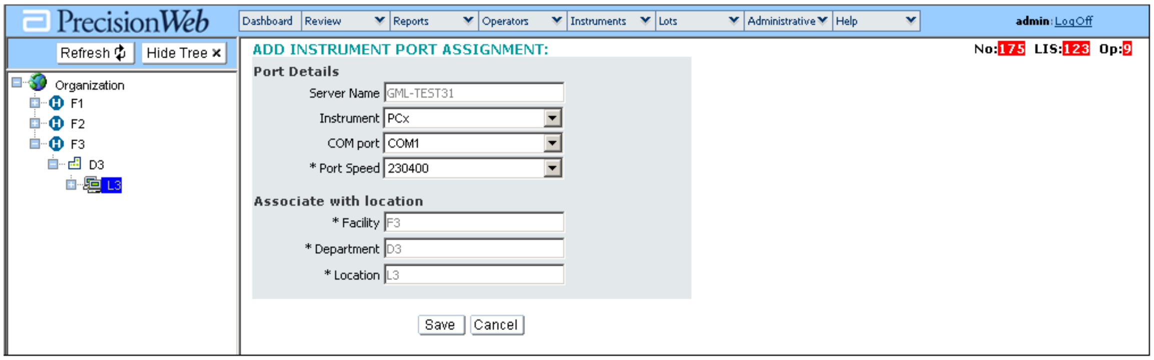


Add a Port Assignment

To **add** a COM port assignment for an instrument with a serial connection to the server:

1. Click the **Add** action button.
   - The **Add Instrument Port Assignment** screen displays the Server Name in a read-only field.
2. Select an instrument from the dropdown list.
3. Select an available COM Port from the dropdown list.
4. Select the baud rate from the **Port Speed** dropdown list.

   * Port Speed, Facility, Department and Location fields are ***required*** fields.



5. Click on a **Location** in the Tree.

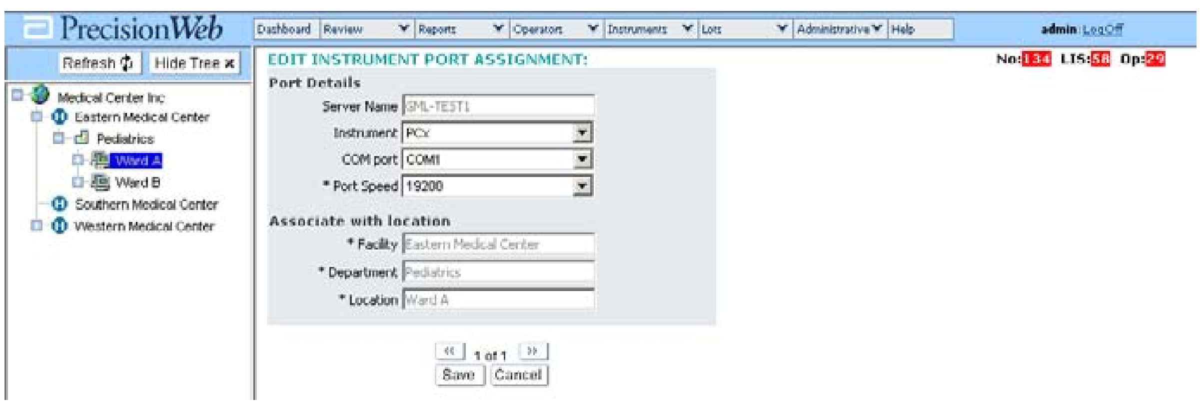
   - The selected Location and the associated Facility and Department fields automatically display the selected Location.

6. Click the **Save** button to save the data or Click the **Cancel** button to cancel the add action without saving.

Edit a Port Assignment

To **edit** a COM port assignment for an instrument at a specific location:

1. Click the box in the **Instrument** column.
2. Click the **Edit** action button.



The **Edit Instrument Port Assignment** screen appears with the information stored in the database for the selected COM port assignment record.

* The Port Speed, Facility, Department and Location fields are ***required*** fields.

To **change** the Instrument type, COM port assignment, the port speed or the location of the instrument:

1. Select a different Instrument from the dropdown list.

2. Select a different **COM port** from the dropdown list.

3. Click on a different Location in the Tree.

- The Location field and the associated Department and Facility fields automatically display the selected Location.

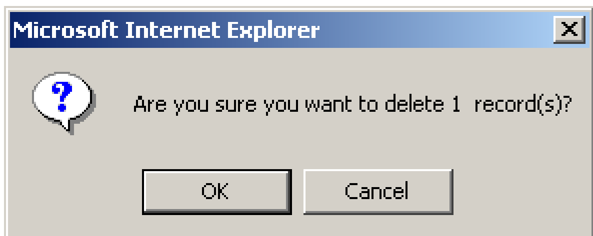
4. Select the baud rate from the **Port Speed** dropdown list.

5. Click the **Save** button to save the edited data or Click the **Cancel** button to cancel the edit action without saving.

Delete a Port Assignment

To **delete** a COM port assignment for an instrument at a specific location:

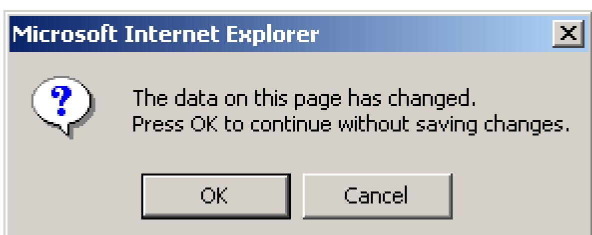
1. Click the box in the **Instrument** column.
2. Click the **Delete** action button.
3. The following dialogue box is displayed.



4. Click the **OK** button to delete the COM port record(s) or Click the **Cancel** button to cancel the delete action without saving.

Warning Messages

If a different menu option is selected before saving a new or edited instrument port assignment record, the following warning message is displayed:



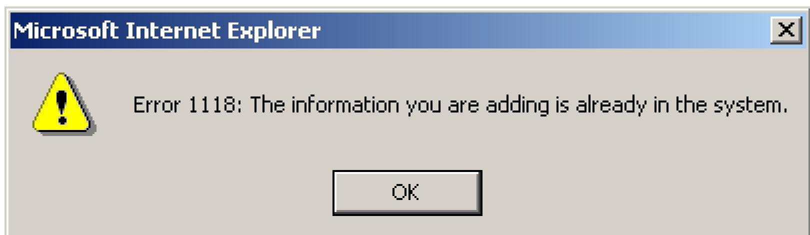
- Click the **OK** button to cancel the data entered.

- Click the **Cancel** button to clear the message and return to the add or edit **Port Assignment** screen to save the data.

If a ***required*** field is missing when the add or edit **Instrument Port Assignment** screens are saved, the following warning message is displayed with a reference to the specific field (Department and/or Location) that is missing:

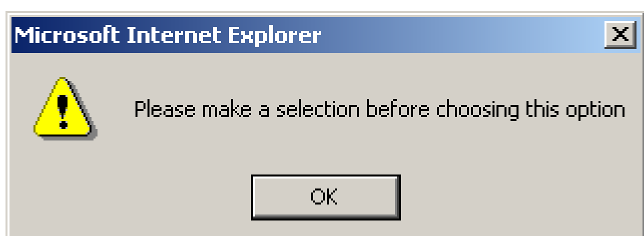
- Click the **OK** button to clear the message and enter the required information.

If the COM port entered already exists in the database for the same location, the following error message is displayed:



- Click the **OK** button to clear the message.

If records are not selected from the table before clicking on the **Edit** or **Delete** action button, the following warning message is displayed:



- Click the **OK** button to clear the message and make a selection.

Tracking Log

Instruments>>Tracking Log

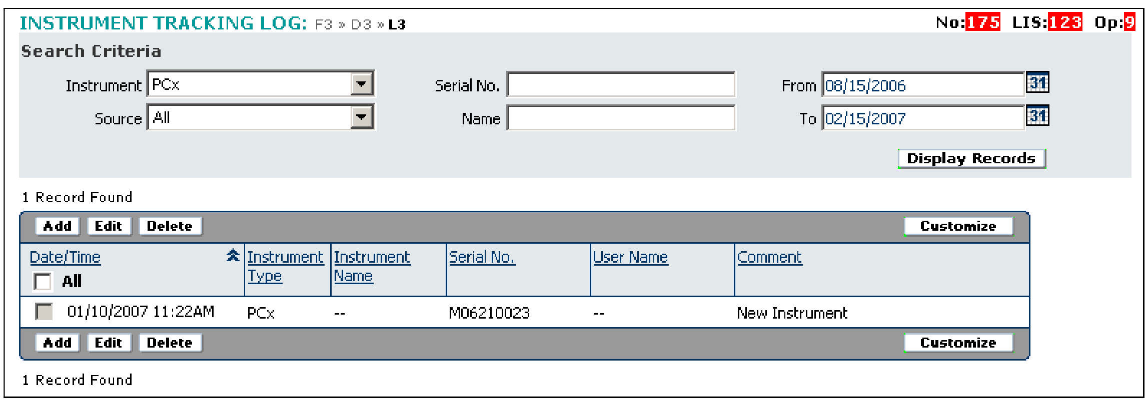
The **Instrument Tracking Log** screen allows the user to view events related to placing instruments in to service, moving an instruments assigned Location and taking instruments out of service.

- Enter an instrument serial number and/or name to view the log of events generated by a single instrument.
- Use the **Source** search criterion to view the log of user-generated or instrument-generated events, and use the **Date Range** search criterion to display events that occurred in a specific time period.

To **view** the instrument tracking log:

1. Move the mouse cursor over **Instruments** to display the menu options.
2. Click on the **Tracking Log** option.

The **Instrument Tracking Log** screen displays the **Instrument Event** table based on the current Tree location, the system default Search Criteria and a date range of six months prior to today's date.



The available search criteria on the **Instrument Tracking Log** screen are:

Criteria	Options	Description
Instrument	All	System displays tracking events for all instrument types.
	Selected Instrument	System displays results only from the selected Instrument type.
Source	All	System displays all tracking events.
	Instrument generated	System only displays instrument-generated tracking events.
	User Entry	System only displays user-generated tracking events.
Serial No.		Entry field for an instrument serial number.

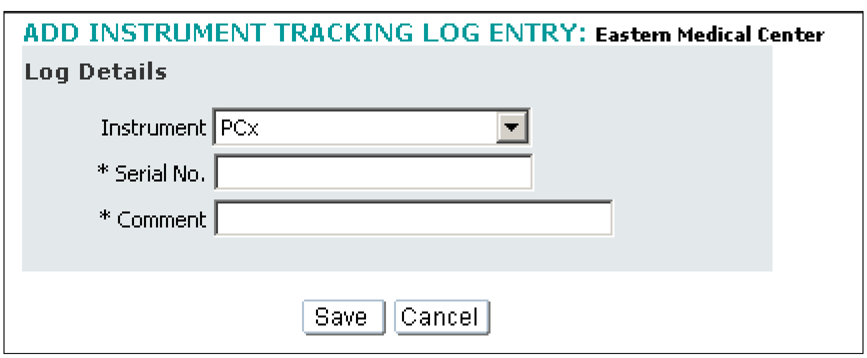
Criteria	Options	Description
Name		Entry field for an instrument name. System only displays tracking events for the instrument that matches, or is similar to, the serial number or name entered.
Date Range		System default displays date range of six months prior to today's date. Enter or select a **From** and a **To** date to display tracking events that occurred between the selected dates.
	From	Click on the calendar icon to display the pop-up calendar and click on a date. The **From** date field automatically displays the selected date.
	To	Click on the calendar icon to display the pop-up calendar and click on a date. The **To** date field automatically displays the selected date.

Add a User-defined Event:

To add a user-defined event:

1. Click the **Add** action button.

The **Add Instrument Tracking Log Entry** screen displays the instrument in a read-only field and the entry fields for an instrument Serial No. and a user-generated event comment.



* Serial No. and Comment are ***required*** entry fields.

2. Click the **Save** button to save the data or Click the **Cancel** button to cancel the add action without saving.

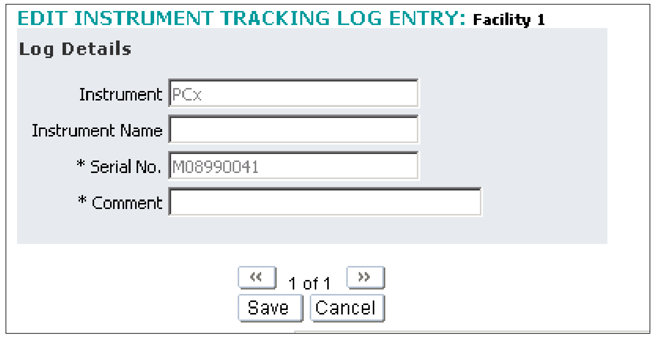
Edit a User-defined Event

To **edit** a single user-defined event or multiple user-defined events:

1. Click the box(es) in the Date/Time column.

2. Click the **Edit** action button.

The **Edit Instrument Tracking Log Entry** screen displays the Serial No. in a read-only field and the user-generated comment stored in the database for the first selected record.



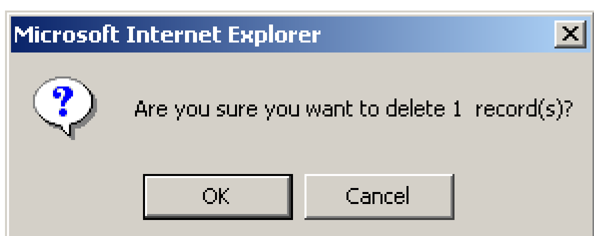
* Serial No. and Comment are ***required*** entry fields.

3. Click the **Save** button to save the edited data or Click the **Cancel** button to cancel the edit action, then Click the **OK** button to clear the message.

Delete a User-defined Event

To **delete** a single user-defined event or multiple user-defined events:

1. Click the box in the **Date/Time** column.
2. Click the **Delete** action button.
3. The following dialogue box is displayed.



4. Click the **OK** button to delete the user-defined event(s) or Click the **Cancel** button to cancel the delete action without saving.

> ***Note:*** *If the serial number specified in the search criteria entry field of the Instrument Tracking Log screen is not in the database, the Table displays a message: "No data is available for this selection. Please change criteria or tree selection."*

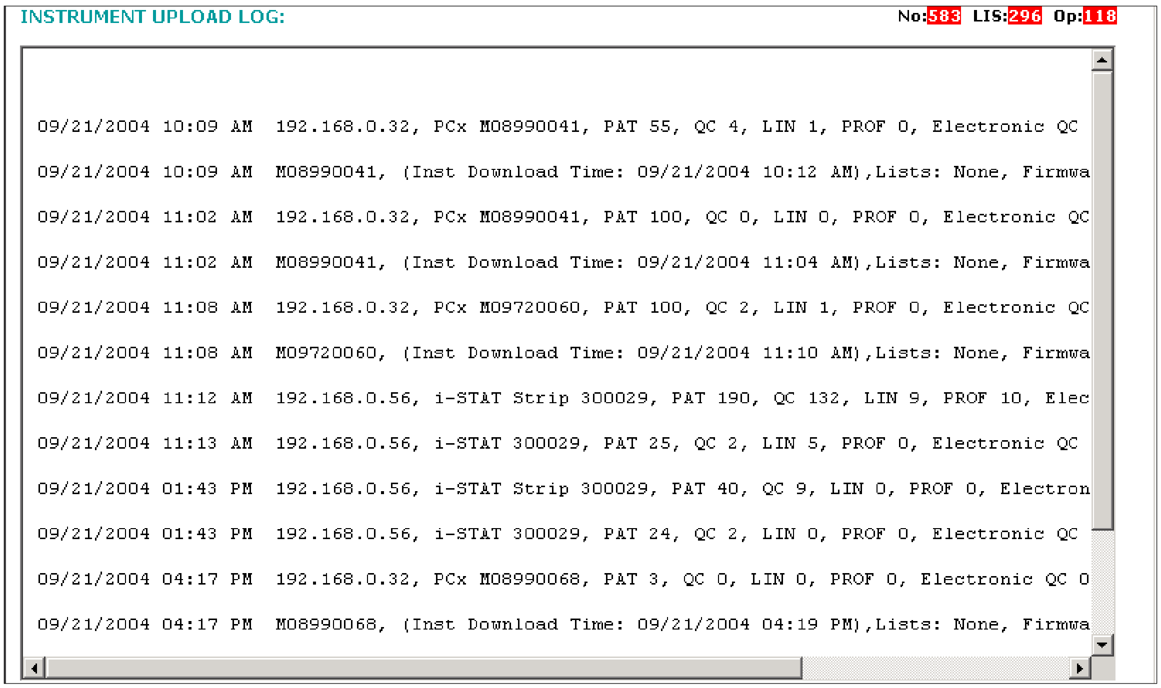
Upload Log

Instruments>>Upload Log

To **view** the instrument upload log:

1. Move the mouse cursor over **Instruments** to display the menu options.
2. Click on the **Upload Log** option.

The **Upload Log** screen displays information on instrument upload and data forwarding events.



8. Lots

Lots Overview

The **Lots** menu option provides access to five screens for use in managing reagent lots. The **Control** screen allows you to manage Quality Control lot information. The **Linearity** screen allows you to manage lot information for Linearity Panels. The **Proficiency** screen allows you to manage lot information for Proficiency Testing samples. The **Reagent >> Single & Multi Analyte** screens allow you to manage lot information for Test Strips and Cartridges. Each screen is available only if your account was granted this permission by the Administrator or POCC.

Control Lots Screen

Lots>>Control

The **Control Lots** screen allows you to view, add, edit and delete Quality Control lot information for a Facility.

- Each Facility in the Organization maintains a separate control lot list.
- Use the **Search Criteria** options to display lots that were put into service within a specific date range.

To **view** control lots:

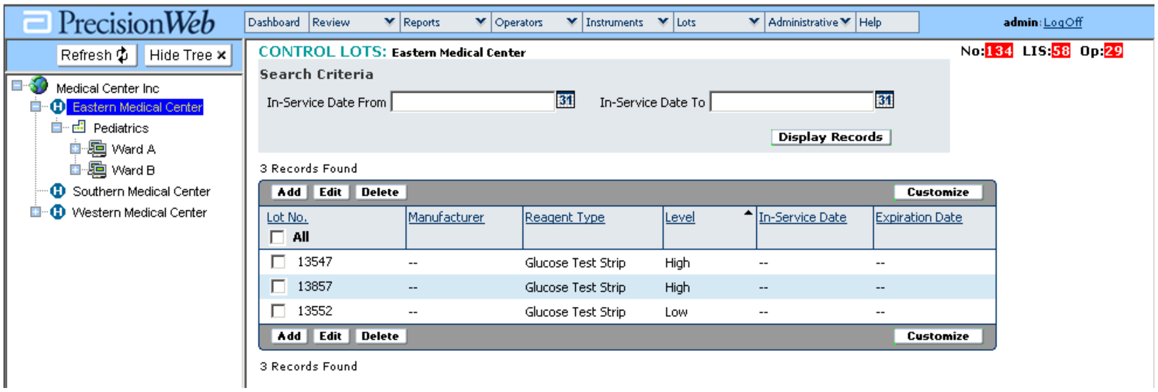
1. Move the mouse cursor over **Lots** to display the menu options.
2. Click on the **Control** option.

Note: *If the Organization is highlighted in the Tree when the* ***Lots*** *menu option is selected, no results are displayed and the* ***Add*** *action button is not displayed on the table's action bar.*

The **Control Lots** screen displays the Control Lots table with lots based on the Facility highlighted in the Tree.

To **view** lots at a different location:

1. Click on a **Facility** in the Tree.
   - All other Tree options are disabled.

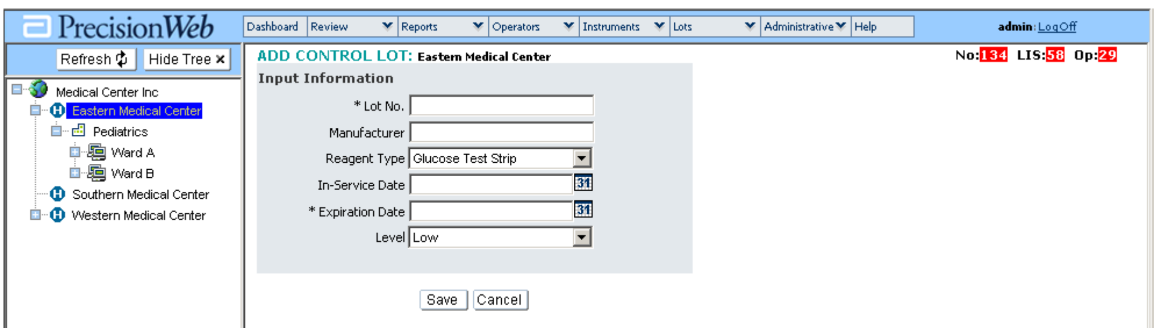


Add a Control Lot

To **add** a control lot:

1. Click on a Facility in the Tree.
2. Click the **Add** action button.

The **Add Control Lot** screen displays the entry fields for control lot information.



* Lot No. and Expiration Date are ***required*** entry fields. The Lot No. field accepts up to a **maximum** of 30 characters.

The information entered will be stored in the database.

***Lot No.**	Enter up to 30 characters for the lot number – ***required.***
Manufacturer	Enter up to 30 characters for the manufacturer name.
Reagent Type	Select a Reagent Type from the drowdown list. The system default for Reagent Type is Glucose Test Strip.
In-Service Date	Click on the calendar icon to display the pop-up calendar and click on a date. The **In-Service Date** field automatically displays the selected date.
***Expiration Date**	Click on the calendar icon to display the pop-up calendar and click on a date.

The **Expiration Date** field automatically displays the selected date – ***required.***

Level Select the control solution level from the dropdown list:
Low
Normal
High

1. Click the **Save** button to save the data. The Control Lots screen appears with the new lot displayed in the Control Lots table.

    - Click the **Cancel** button to cancel the add action without saving.

Edit a Control Lot

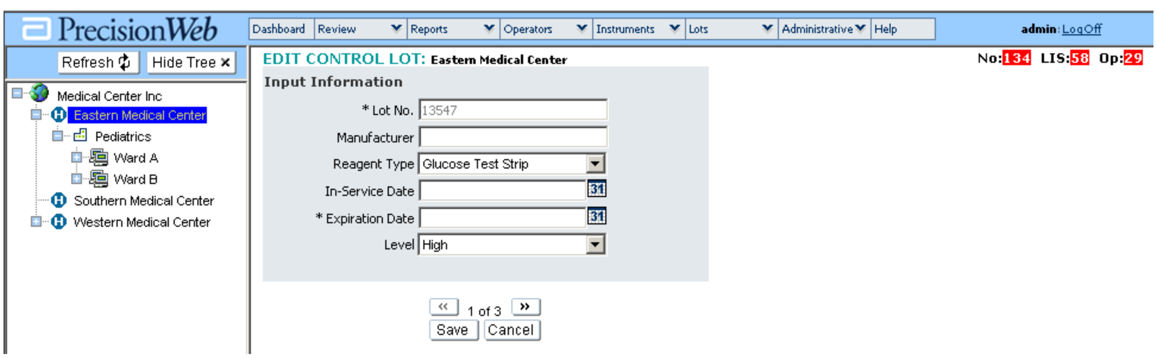
To **edit** a single control lot or multiple control lots in a Facility:

1. Click the box(es) in the Lot No. column.
2. Click the **Edit** action button.

To **edit** all control lots in a Facility:

1. Click the box marked **All** in the Lot No. column header.
2. Click the **Edit** action button.

The **Edit Control Lot** screen appears with the information stored in the database for the first selected lot record. If multiple lot records are selected each record is displayed on a separate page.



* Expiration Date is a ***required*** entry field.

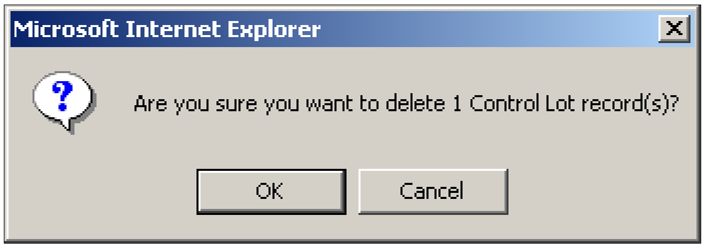
The Lot No. is displayed in a read-only field and cannot be edited. All other entry fields can be edited and will be stored in the database.

3. Click the **Save** button to save the edited data or Click the **Cancel** button to cancel the edit action without saving.

Delete a Control Lot

To **delete** a single control lot or multiple control lots in a Facility:

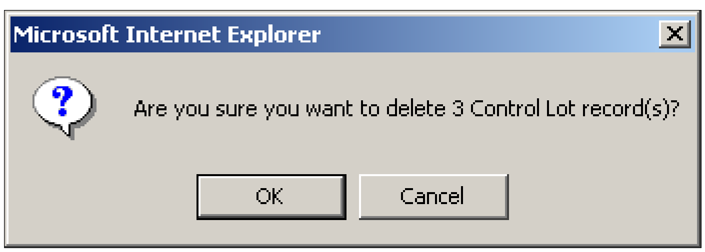
1. Click the box(es) in the Lot No. column.
2. Click the **Delete** action button.
3. The following message will be displayed:



4. Click **OK** to delete the record.
5. Click **Cancel** to return to the Control Lots screen.

To **delete** all control lots in a Facility:

1. Click the box marked **All** in the Lot No. column header.
2. Click the **Delete** action button.
3. The following message will be displayed:



4. Click **OK** to delete the selected records.
5. Click **Cancel** to return to the Control Lots screen.

Note: *The delete action will remove the control lot only if* ***no*** *test data exists in the active database for that lot. If the selected control lot is associated with test data, the control lot cannot be deleted.*

Using the Filter Options

To **find** control lots by In-Service Date:

1. Click on the calendar icon in the **Search Criteria** options to display the pop-up calendar.

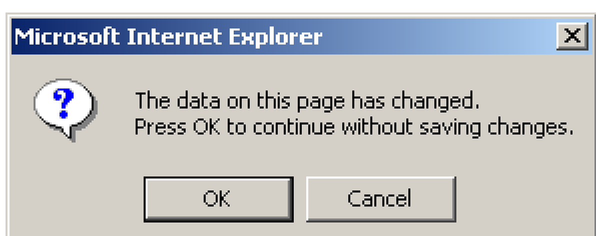
2. Click on a date for the **From** and/or **To** date fields.

3. Click the **Display Records** button.

The **Control Lots** screen displays the Control Lots table based on results that match the dates entered in the From and To date fields.

Warning Messages

If a different menu option is selected before saving new or edited lot information, the following warning message is displayed:



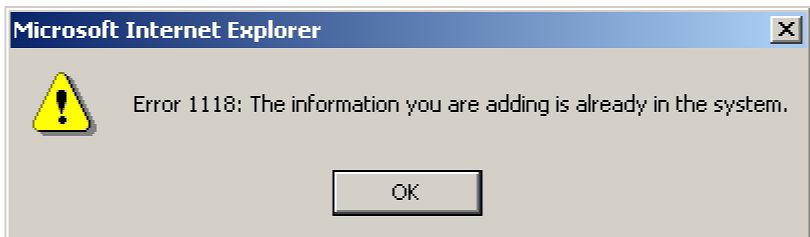
- Click the **OK** button to cancel the data entered, or

- Click the **Cancel** button to clear the message and return to the add or edit screen to save the data.

If a ***required*** field is missing when lot information is saved, the following warning message is displayed with a reference to the specific required field (Lot No. and/or Expiration Date) that is missing:

- Click the **OK** button to clear the message and enter the required information.

If the Lot Number entered already exists in the database, the following error message is displayed:

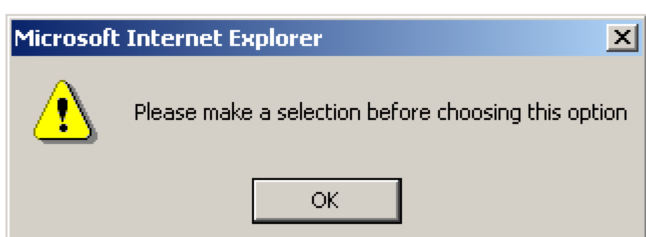


- Click the **OK** button to clear the message.

If data entered in the Expiration Date field is not valid, the following warning message is displayed:

- Click the **OK** button to clear the message and enter the valid information.

If records are not selected from the table before clicking the **Edit** or **Delete** action buttons, the following warning message is displayed.



- Click the **OK** button to clear the message and make a selection.

If a lot is selected for deletion with test data stored in the active database, the following error message is displayed.

- Click the **OK** button to clear the message.

Linearity Lots Screen

Lots>>Linearity

The **Linearity Lots** screen allows you to view, add, edit and delete linearity lot information for a Facility.

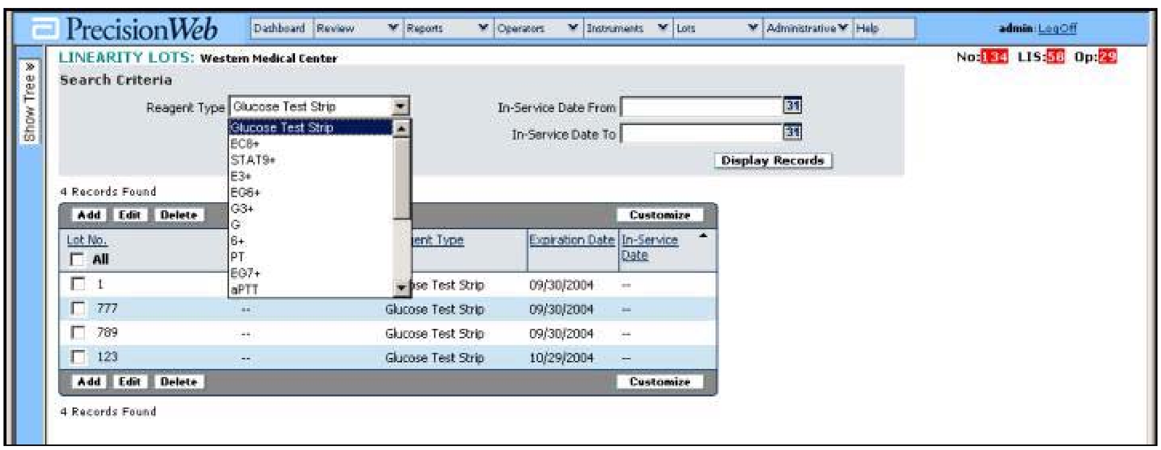
- Each Facility in the Organization maintains a separate linearity lot list.
- Use the **Search Criteria** options to change the Reagent Type or display lots that were put into service within a specified date range.

To **view** linearity lots:

1. Move the mouse cursor over **Lots** to display the menu options.
2. Click on the **Linearity** option.

The **Linearity Lots** screen displays the Linearity Lots table with lots based on the Facility highlighted in the Tree.

The default Reagent Type is Glucose Test Strip. Select the Reagent Type dropdown list to select a different reagent type.



> ***Note:** If the Organization is highlighted in the Tree when the **Lots** menu option is selected, then no results are displayed and the **Add** action button is not displayed on the table's action bar.*

To **view** lots at a different location:

1. Click on a **Facility** in the Tree.
    - All other Tree options are disabled.

Add a Linearity Lot

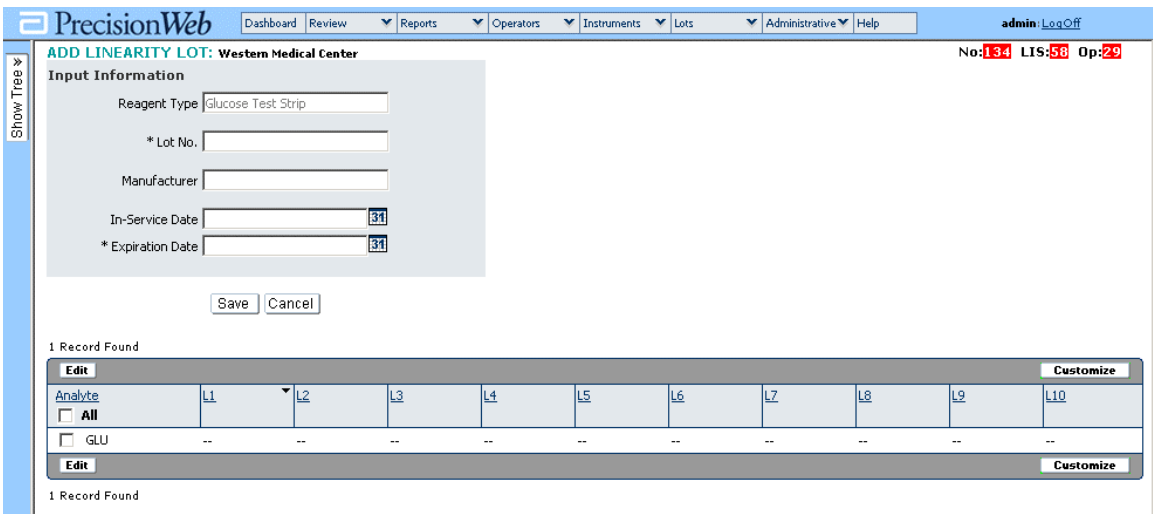
To **add** a linearity lot click on a Facility in the Tree.

1. Click on a Facility in the Tree.

2. Select a reagent type from the Reagent Type dropdown list in the Search Criteria and click Display Records.

3. Click the **Add** action button and enter the linearity lot information

The **Add Linearity Lot** screen displays the entry fields for linearity lot information.



* Lot No. and Expiration Date are ***required*** entry fields. The Lot No. field accepts up to a **maximum** of 30 characters.

The information entered will be stored in the database.

Field	Description
***Lot No.**	Enter up to 30 characters for the lot number – ***required.***
Manufacturer	Enter up to 30 characters for the manufacturer name.
Reagent Type	System default for Reagent Type is Glucose Test Strip. A different reagent type may be specified from the Reagent Type dropdown list on the Linearity Lots screen.
In-Service Date	Click on the calendar icon to display the pop-up calendar and click on a date. The **In-Service Date** field automatically displays the selected date.
***Expiration Date**	Click on the calendar icon to display the pop-up calendar and click on a date.

Field	Description
	The **Expiration Date** field automatically displays the selected date – ***required.***
Level	Linearity levels are entered on a separate sub-screen. To access it, select the linked Analyte column header from the table in the bottom part of the screen and click the **Edit** button (see below).

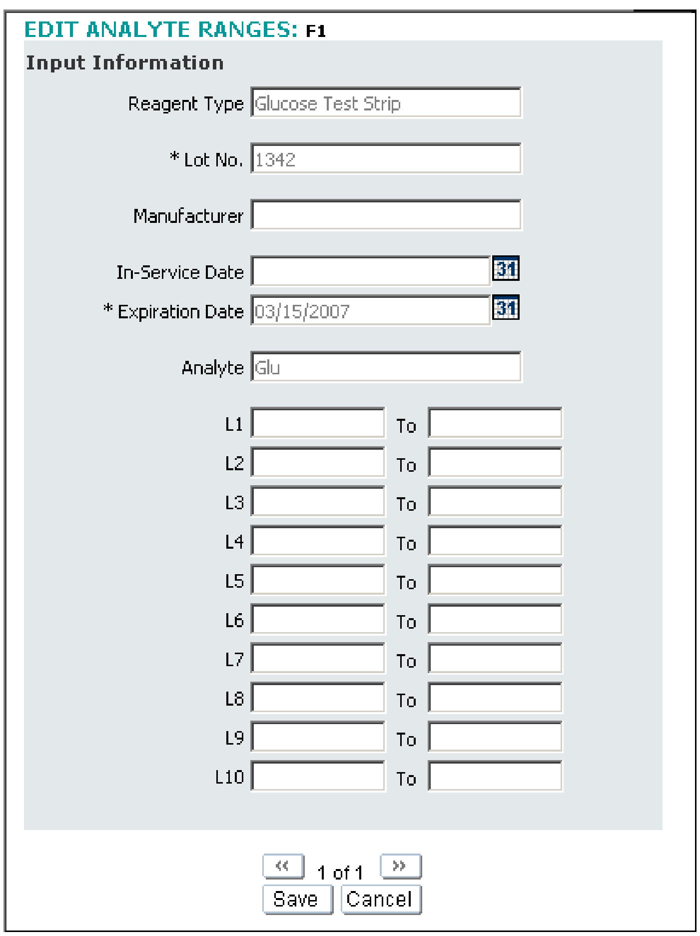
4. Click the **Save** button to save the data. The Linearity Lots screen appears with the new lot displayed in the Linearity Lots table or Click the **Cancel** button to cancel the add action without saving.

To **add** Analyte Ranges (from the **Add Linearity Lot** screen):

1. Select one or more records from the table by click the box(es) in the **Analyte** column.

2. Click the **Edit** action button.

The **Edit Analyte Ranges** screen appears with information stored in the database for the first selected lot record. If multiple lot records are selected each record is displayed on a separate page.



All of the fields are disabled except for the Range fields.

3. Edit the range fields (L1 - L10) as applicable.

4. Click the **Save** button to save the edited data or Click the **Cancel** button to cancel the edit action without saving.

Edit a Linearity Lot

To **edit** a single linearity lot or multiple linearity lots in a Facility:

1. Click the box(es) in the Lot No. column.

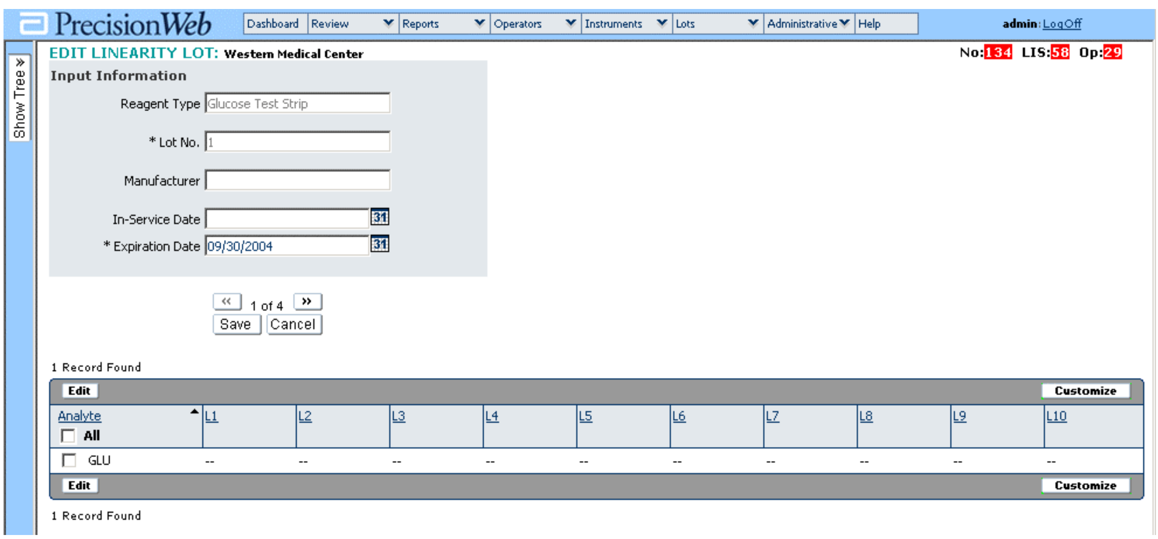
2. Click the **Edit** action button.

To **edit** all linearity lots in a Facility:

1. Click the box marked **All** in the Lot No. column header.

2. Click the **Edit** action button.

The **Edit Linearity Lot** screen appears with the information stored in the database for the first selected lot record. If multiple lot records are selected each record is displayed on a separate page.



* Expiration Date is a ***required*** entry field.

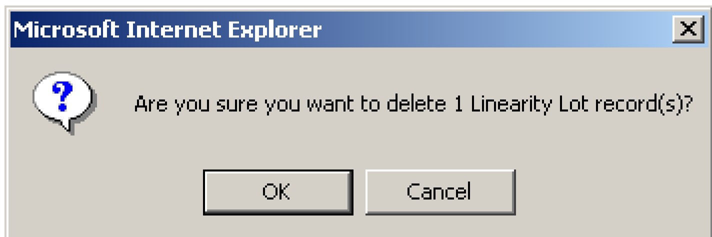
- The **Lot** No. is displayed in a read-only field and cannot be edited. All other entry fields can be edited and will be stored in the database (to edit levels, see Section To Edit Analyte Ranges, above).

3. Click the **Save** button to save the edited data or Click the **Cancel** button to cancel the edit action without saving.

Delete a Linearity Lot

To **delete** a single linearity lot or multiple linearity lots in a Facility:

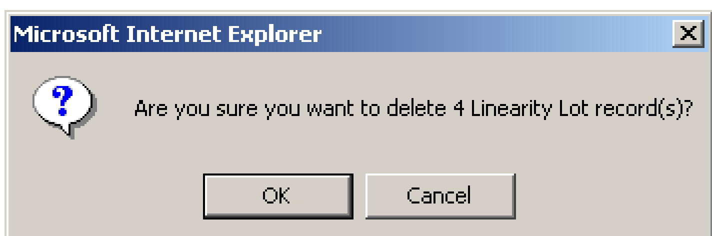
1. Click the box(es) in the Lot No. column.
2. Click the **Delete** action button.
3. The following message will be displayed:



4. Click **OK** to delete the record or Click **Cancel** to return to the Linearity Lots screen without saving.

To **delete** all linearity lots in a Facility:

1. Click the box marked **All** in the Lot No. column header.
2. Click the **Delete** action button.
3. The following message will be displayed:



4. Click **OK** to delete the records or Click **Cancel** to return to the Linearity Lots screen without saving.

***Note:** The delete action will remove the linearity lot only if **no** test data exists in the active database for that lot. If the selected linearity lot is associated with test data, the linearity lot cannot be deleted.*

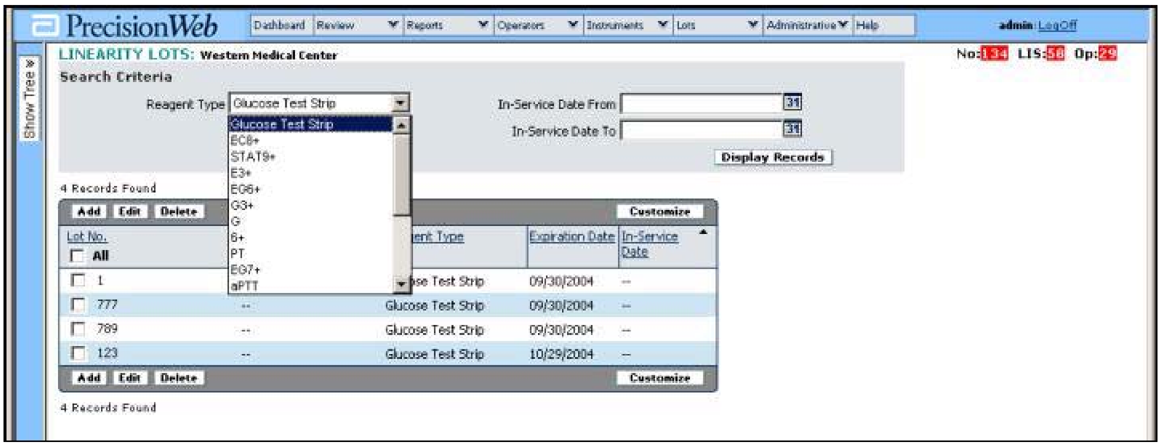
Using the Filter Options

To **find** linearity lots by Reagent Type:

1. Select from the dropdown list in the Reagent Type field.

2. Click the **Display Records** button.

The **Linearity Lots** screen displays the Linearity Lots table based on results that match the Reagent Type chosen from the dropdown list.



To **find** linearity lots by In-Service Date:

1. Click on the calendar icon in the **Search Criteria** options to display the pop-up calendar.

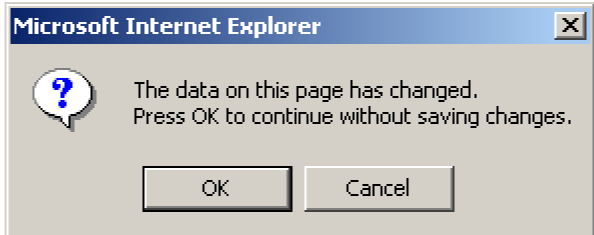
2. Click on a date for the **From** and/or **To** date fields.

3. Click the **Display Records** button.

The **Linearity Lots** screen displays the Linearity Lots table based on results that match the dates entered in the **From** and **To** date fields.

Warning Messages

If a different menu option is selected before saving new or edited lot information, the following warning message is displayed:

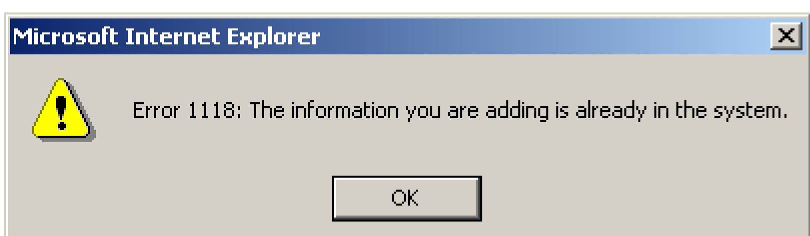


- Click the **OK** button to cancel the data entered, or
- Click the **Cancel** button to clear the message and return to the add or edit screen to save the data.

If a ***required*** field is missing when lot information is saved, the following warning message is displayed with a reference to the specific required field (Lot Code, Lot No. and/or Expiration Date) that is missing:

- Click the **OK** button to clear the message and enter the required information.

If the Lot Number entered already exists in the database, the following error message is displayed:

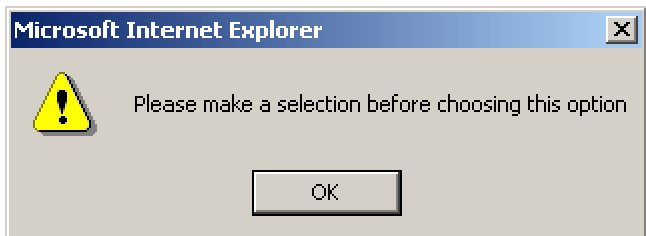


- Click the **OK** button to clear the message.

If data entered in the Expiration Date field is not valid, the following warning message is displayed:

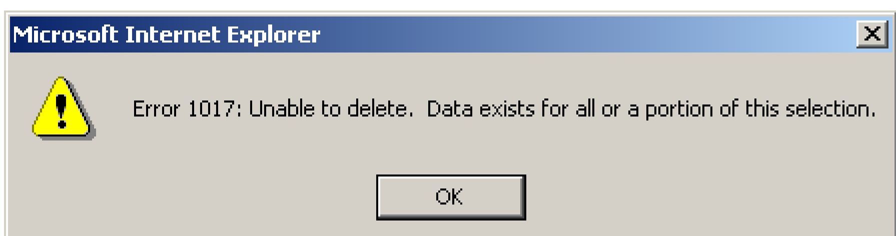
- Click the **OK** button to clear the message and enter the valid information.

If records are not selected from the table before clicking the **Edit** or **Delete** action buttons, the following warning message is displayed:



- Click the **OK** button to clear the message and make a selection.

If a lot is selected for deletion with test data stored in the active database, the following error message is displayed:



- Click the **OK** button to clear the message.

Proficiency Lots Screen

Lots>>Proficiency

The **Proficiency Lots** screen allows you to view, add, edit and delete proficiency lot information for a Facility.

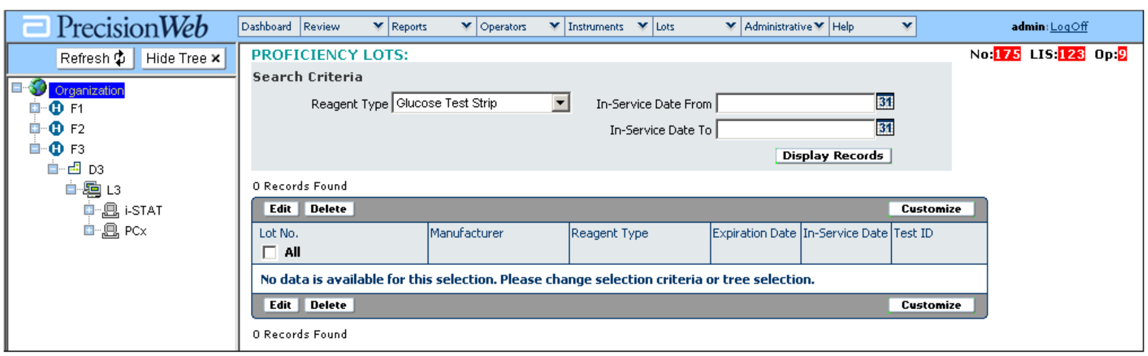
- Each Facility in the Organization maintains a separate proficiency lot list.
- Use the **Search Criteria** options to change the Reagent Type or display lots that were put into service within a specified date range.

To **view** proficiency lots:

1. Move the mouse cursor over **Lots** to display the menu options.
2. Click on the **Proficiency** option.

The **Proficiency Lots** screen displays the Proficiency Lots table with the lots based on the Facility highlighted in the Tree.

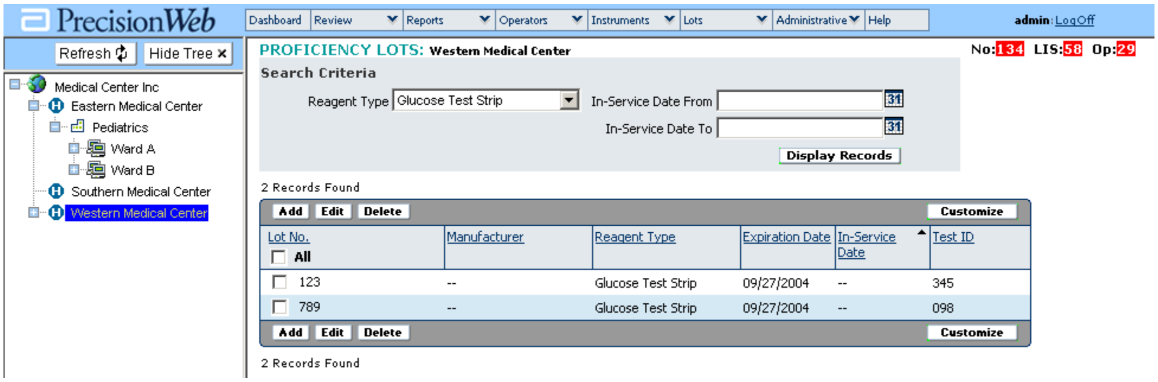
The default Reagent Type is Glucose Test Strip. Select the Reagent Type dropdown list to select a different reagent type.



***Note:** If the Organization is highlighted in the Tree when the **Lots** menu option is selected, then no results are displayed and the **Add** action button is not displayed on the table's action bar.*

To **view** lots at a different location:

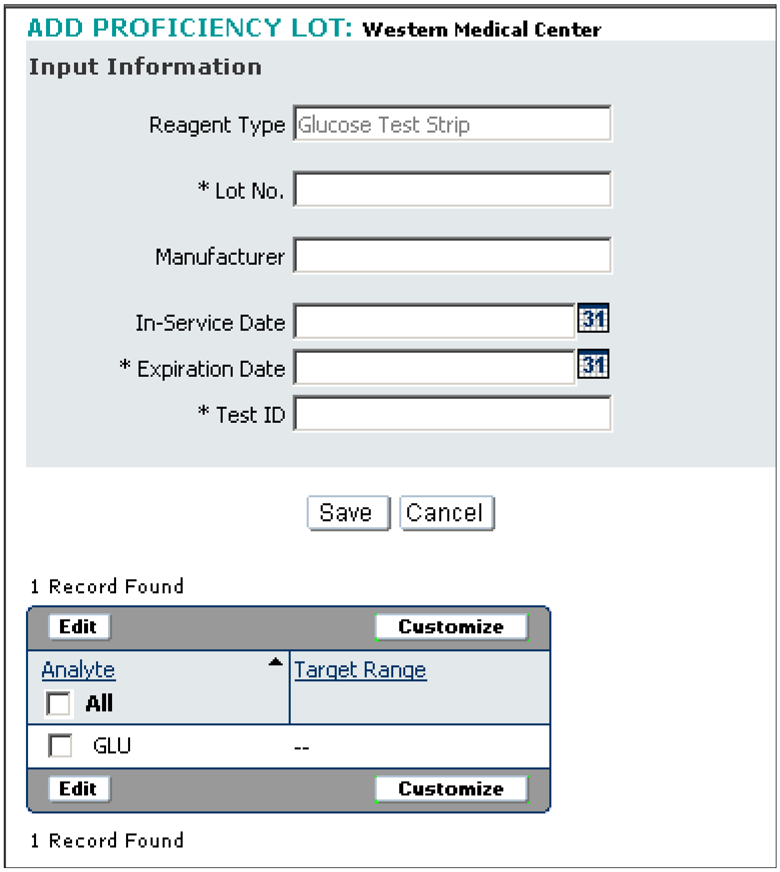
1. Click on a **Facility** in the Tree.
   - All other Tree options are disabled.



Add a Proficiency Lot

1. Click on a Facility in the Tree.
2. Select a reagent type from the Reagent Type dropdown list in the Search Criteria and click Display Records.
3. Click the **Add** action button to add the proficiency lot information.

The **Add Proficiency Lot** screen displays the entry fields for proficiency lot information.



* Lot No., Expiration Date and Test ID are ***required*** entry fields. The Lot No. field accepts up to a **maximum** of 30 characters.

The information entered will be stored in the database.

Field	Description
***Lot No.**	Enter up to 30 characters for the lot number – ***required.***
Manufacturer	Enter up to 30 characters for the manufacturer name.
Reagent Type	System default for Reagent Type is Glucose Test Strip. A different reagent type may be specified from the Reagent Type dropdown list on the Linearity Lots screen.
In-Service Date	Click on the calendar icon to display the pop-up calendar and click on a date. The **In-Service Date** field automatically displays the selected date.
***Expiration Date**	Click on the calendar icon to display the pop-up calendar and click on a date. The **Expiration Date** field automatically displays the selected date – ***required.***

Field	Description
***Test ID**	Enter test identifier.
Range	The target proficiency range is entered and edited on a separate subscreen, accessible from he Add/Edit **Proficiency Lot** screen.

4. Click the **Save** button to save the data. The Proficiency Lots screen appears with the new lot displayed in the Proficiency Lots table or Click the **Cancel** button to cancel the add action without saving.

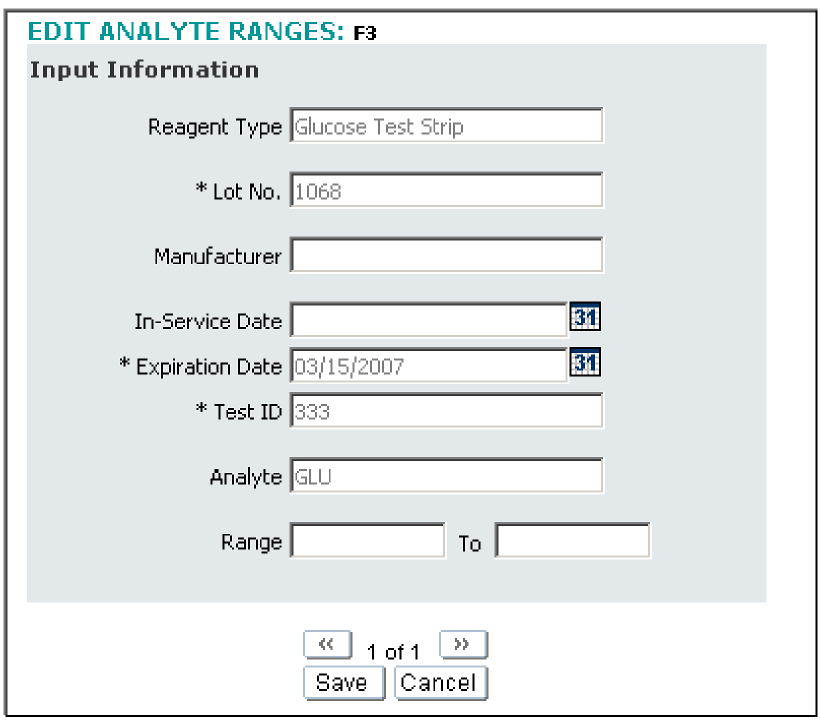
To **add** Analyte Ranges (from the **Add Proficiency Lot** screen):

1. Select one or more records from the Table by clicking the box(es) in the **Analyte** column.

2. Click the **Edit** action button.

The Edit Analyte Ranges screen appears with the information stored in the database for the first selected lot record. If multiple lot records are selected each record is displayed on a separate page.

All of the fields are disabled except for the Range fields.



3. Edit the Range fields.

4. Click the **Save** button to save the edited data or Click the **Cancel** button to cancel the edit action without saving.

Edit a Proficiency Lot

To **edit** a single proficiency lot or multiple proficiency lots in a Facility:

1. Click the box(es) in the Lot No. column.
2. Click the **Edit** action button.

To **edit** all proficiency lots in a Facility:

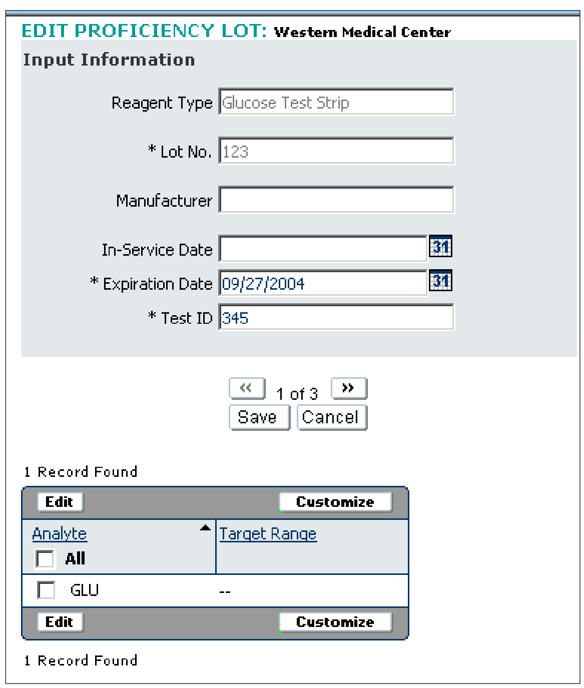
1. Click the box marked **All** in the Lot No. column header.
2. Click the **Edit** action button.

 * Expiration Date and Test ID are ***required*** entry fields.

The **Edit Proficiency Lot** screen appears with the information stored in the database for the first selected lot record. If multiple lot records are selected each record is displayed on a separate page.

The Lot No. is displayed in a read-only field and cannot be edited. All other entry fields can be edited and will be stored in the database (to edit Target Ranges, see Section To **Edit** Analyte Ranges, above).

3. Click the **Save** button to save the edited data or Click the **Cancel** button to cancel the edit action without saving.



To **Edit** Analyte Ranges (from the **Edit Proficiency Lot** screen):

1. Select one or more records from the Table by clicking the box(es) in the **Analyte** column.

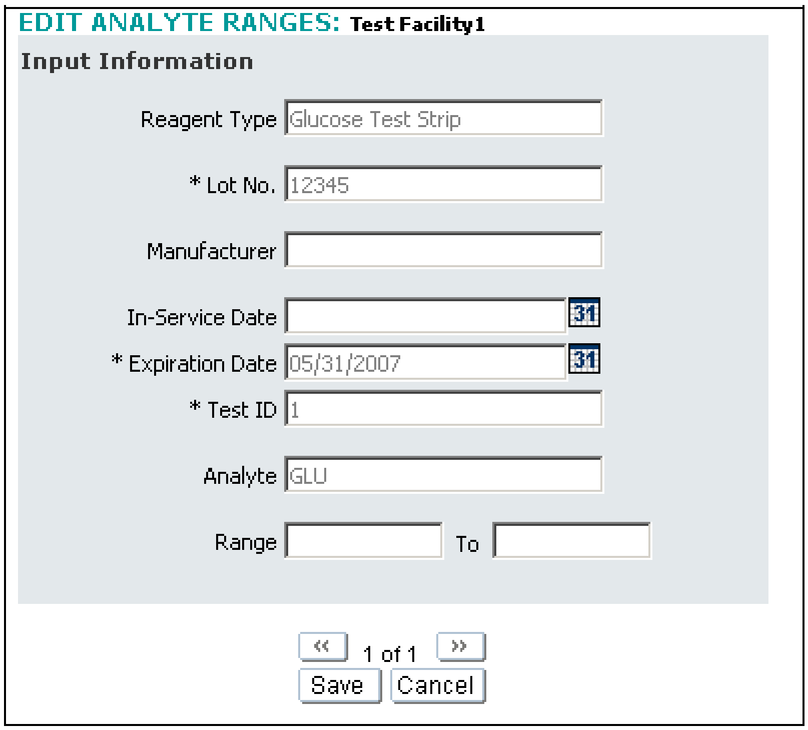
2. Click the **Edit** action button.

The Edit Analyte Ranges screen appears with the information stored in the database for the first selected lot record. If multiple lot records are selected, each record is displayed on a separate page.

All of the fields are disabled except for the Range fields.

3. Fill in the Range fields.

4. Click the **Save** button to save the edited data or Click the **Cancel** button to cancel the edit action without saving.



Delete a Proficiency Lot

To **delete** a single proficiency lot or multiple proficiency lots in a Facility:

1. Click the box(es) in the Lot No. column.
2. Click the **Delete** action button.

To **delete** all proficiency lots in a Facility:

1. Click the box marked **All** in the Lot No. column header.
2. Click the **Delete** action button.

> ***Note:*** *The delete action will remove the proficiency lot only if* ***no*** *test data exists in the active database for that lot. If the selected proficiency lot is associated with test data, the proficiency lot cannot be deleted.*

Using the Filter Options

To **find** proficiency lots by Reagent Type:

1. Select from the dropdown list in the Reagent Type field.
2. Click the **Display Records** button.

The **Proficiency Lots** screen displays the Proficiency Lots table based on results that match the Reagent Type chosen from the dropdown list.

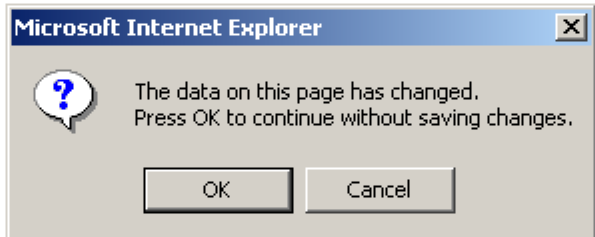
To **find** proficiency lots by In-Service Date:

1. Click on the calendar icon in the **Search Criteria** Options to display the pop-up calendar.
2. Click on a date for the **From** and/or **To** date fields.
3. Click the **Display Records** button.

The **Proficiency Lots** screen displays the Proficiency Lots table based on results that match the dates entered in the **From** and **To** date fields.

Warning Messages

If a different menu option is selected before saving new or edited lot information, the following warning message is displayed.

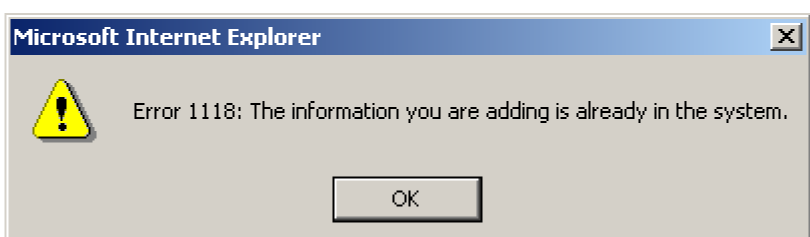


- Click the **OK** button to cancel the data entered, or
- Click the **Cancel** button to clear the message and return to the add or edit screen to save the data.

If a ***required*** field is missing when lot information is saved, the following warning message is displayed with a reference to the specific required field (Lot No., Expiration Date and/or Test ID) that is missing:

- Click the **OK** button to clear the message and enter the required information.

If the Lot Number entered already exists in the database, the following error message is displayed:

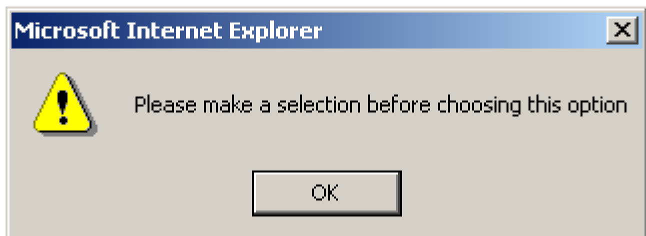


- Click the **OK** button to clear the message.

If data entered in the Expiration Date field is not valid, the following warning message is displayed:

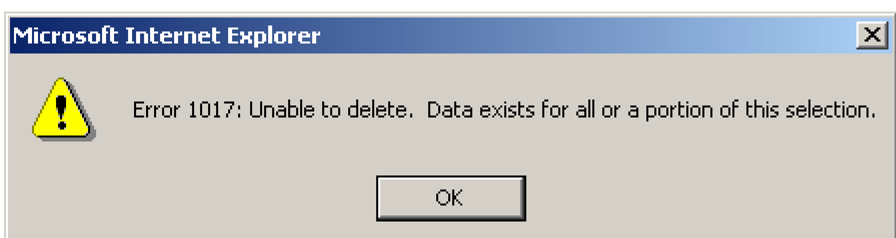
- Click the **OK** button to clear the message and enter the valid information.

If records are not selected from the table before clicking the **Edit** or **Delete** action buttons, the following warning message is displayed:



- Click the **OK** button to clear the message and make a selection.

If a lot is selected for deletion with test data stored in the active database, the following error message is displayed:



- Click the **OK** button to clear the message.

Reagent Lots Screen

Lots>>Reagent

The **Reagent Lots** screen allows you to view, add, edit and delete reagent lots assigned to a Facility, Department or Location.

- Each Facility, Department or Location maintains a separate reagent lot list.
- Use the **Search Criteria** options to display lots that were put into service within a specific date range or view lots by their download to instrument status.

Reagent Lots and the Parent-Child Relationship

Reagent Lots saved to the Download to Instruments list at the top level of the Tree affect all sub-levels. For example, a reagent lot saved to the Facility (parent) level will be applied to all associated Departments and Locations.

Reagent Lots saved to the Download to Instruments list at a lower level of the Tree affect only the levels below the selected level of the Tree. For example, a reagent lot saved at the Department level will be applied to all Locations (child) associated to the Department (parent). Reagent Lots saved at the Location level affect only the selected Location.

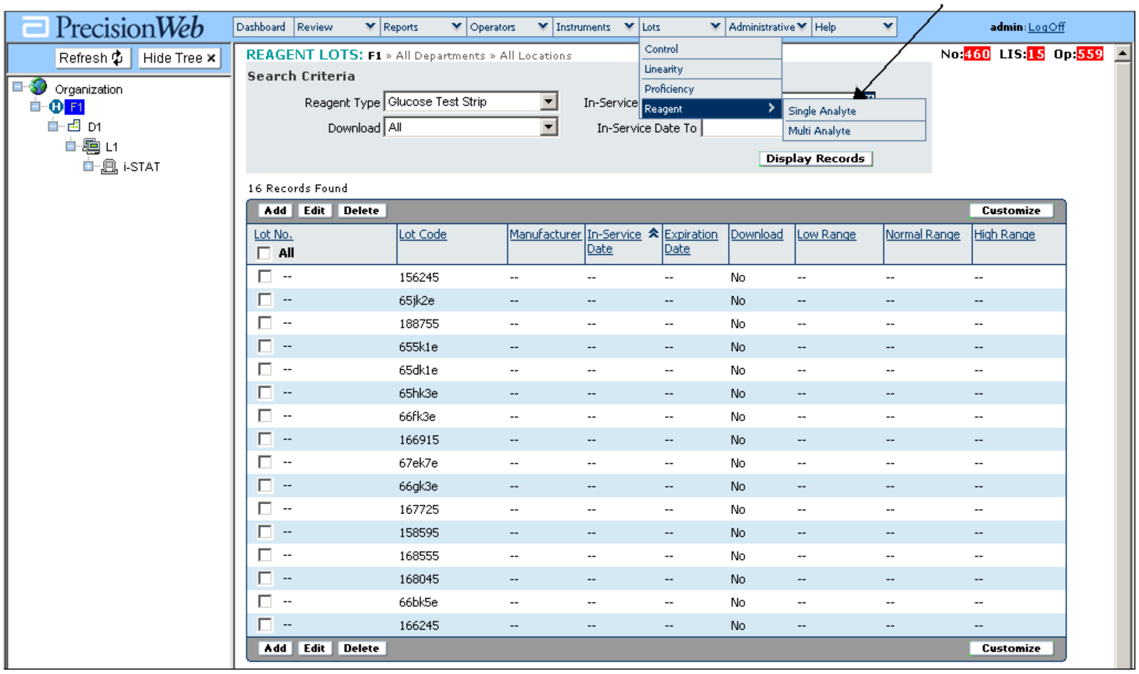
It is important to note the selected Tree level prior to saving Reagent Lots to ensure the Download to Instruments list is applied to the appropriate locations.

Unlike with Instrument Configuration settings, there is no way to reestablish the parent-child relationship once a reagent lot has been saved to the Department or Location level of the Tree. Once a location is disassociated from its parent location any changes to reagent lots will need to be made independent of the parent location.

To **view** reagent lots:

1. Move the mouse cursor over **Lots** to display the menu options.
2. Click on the **Reagent** option.
3. Choose **Single Analyte** or **Multi-Analyte**

The **Reagent Lots** screen displays the Reagent Lots table with lots based on the Location, Department or Facility highlighted in the Tree.



Note: If the Organization is highlighted in the Tree when the ***Lots*** *menu option is selected, no results are displayed, and the* ***Add*** *action button is not displayed on the table's action bar.*

To **view** lots at a different location:

1. Click on a **Facility**, **Department** or **Location** in the Tree.

Add a Single Analyte Reagent Lot

To **add** a single analyte reagent lot:

1. Move the mouse cursor over **Lots** to display the menu options.

2. Click on the Reagent option.

3. Choose Single Analyte

4. Click on a Facility, Department or Location in the Tree.

5. Select Reagent Type Select a reagent type from the Reagent Type dropdown list in the Search Criteria and click Display Records.

6. Click the Add action button.

   * Lot Code, Lot No, Expiration Date and the values for the Low, Normal and High Ranges are ***required*** entry fields. The Lot Code field accepts up to a **maximum** of 30 characters.

- The **Add Reagent Lot** screen displays the Reagent Type in a read-only field and the entry fields for reagent lot information.
- The information entered will be stored in the database.

Field	Description
***Lot Code**	Enter the first six (6) characters from the Abbott glucose test strip reagent lot barcode – ***required.***
***Lot No.**	The application automatically displays the six (6) characters entered in the Lot Code field. The additional eight (8) characters from the Abbott glucose test strip reagent lot barcode are required to download the reagent lot to glucose instruments – ***required.***
Manufacturer	Enter up to 30 characters for the manufacturer name.
In-Service Date	Click on the calendar icon to display the pop-up calendar and click on a date. The **In-Service Date** field automatically displays the selected date.
***Expiration Date**	Click on the calendar icon to display the pop-up calendar and click on a date. The **Expiration Date** field automatically displays the selected date – ***required.***

7. Click on the checkbox to allow the Reagent Lot to be downloaded to instruments.

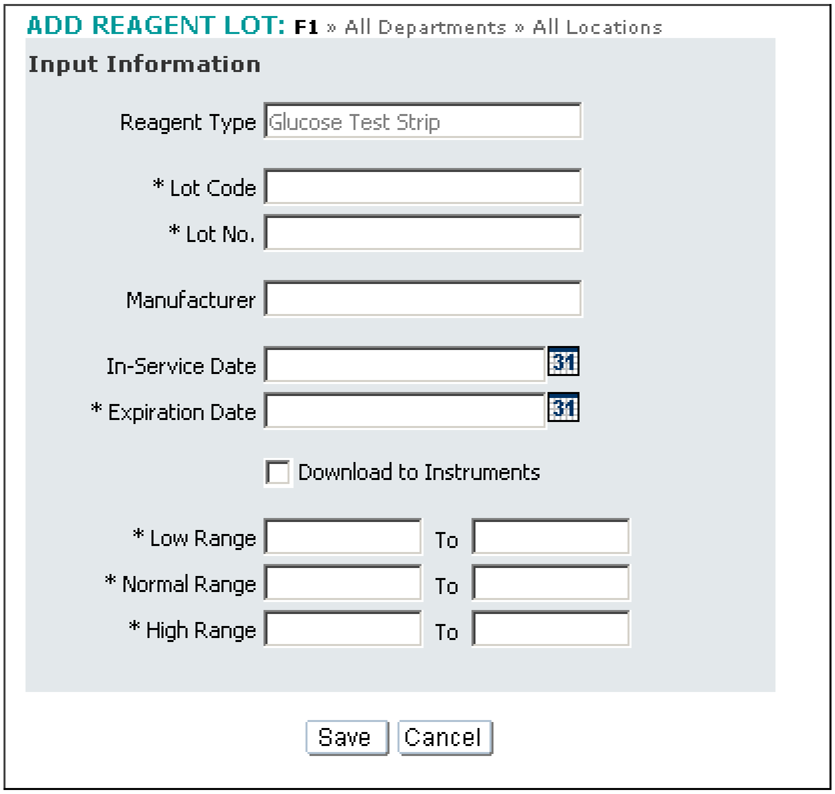
☐ **Download To Instruments**

> ***Note****: The application does not restrict the number of reagent lots selected for Download To Instruments. Be sure to download only reagent lots currently in use to ensure that instruments receive the appropriate reagent download list. Any reagent lot not currently in use should be removed from the download list.*

8. Enter the QC ranges for the Reagent Lot:

***Low Range**	Enter the lower and upper values for the Low Range – ***required.***
***Normal Range**	Enter the lower and upper values for the Normal Range – ***required.***
***High Range**	Enter the lower and upper values for the High Range – ***required.***

9. Click the **Save** button to save the data. The Reagent Lots screen appears with the new lot displayed in the Reagent Lots table or Click the **Cancel** button to cancel the add action without saving.



To **add** a multi analyte reagent lot:

1. Move the mouse cursor over **Lots** to display the menu options.
2. Click on the **Reagent** option.
3. Choose **Multi Analyte**
4. Click on a Facility, Department or Location in the Tree.
5. Select a reagent type from the Reagent Type dropdown list in the Search Criteria and click Display Records.
6. Click the **Add** action button.

The **Add Reagent Lot** screen displays the Reagent Type in a read-only field and the entry fields for reagent lot information.

The information entered will be stored in the database.

* Lot No and Expiration Date entry fields are ***required***. The Lot No. field accepts up to a **maximum** of 30 characters.

Field	Description
***Lot No.**	Enter up to 30 characters for the reagent lot number – ***required.***
Manufacturer	Enter up to 30 characters for the manufacturer name.

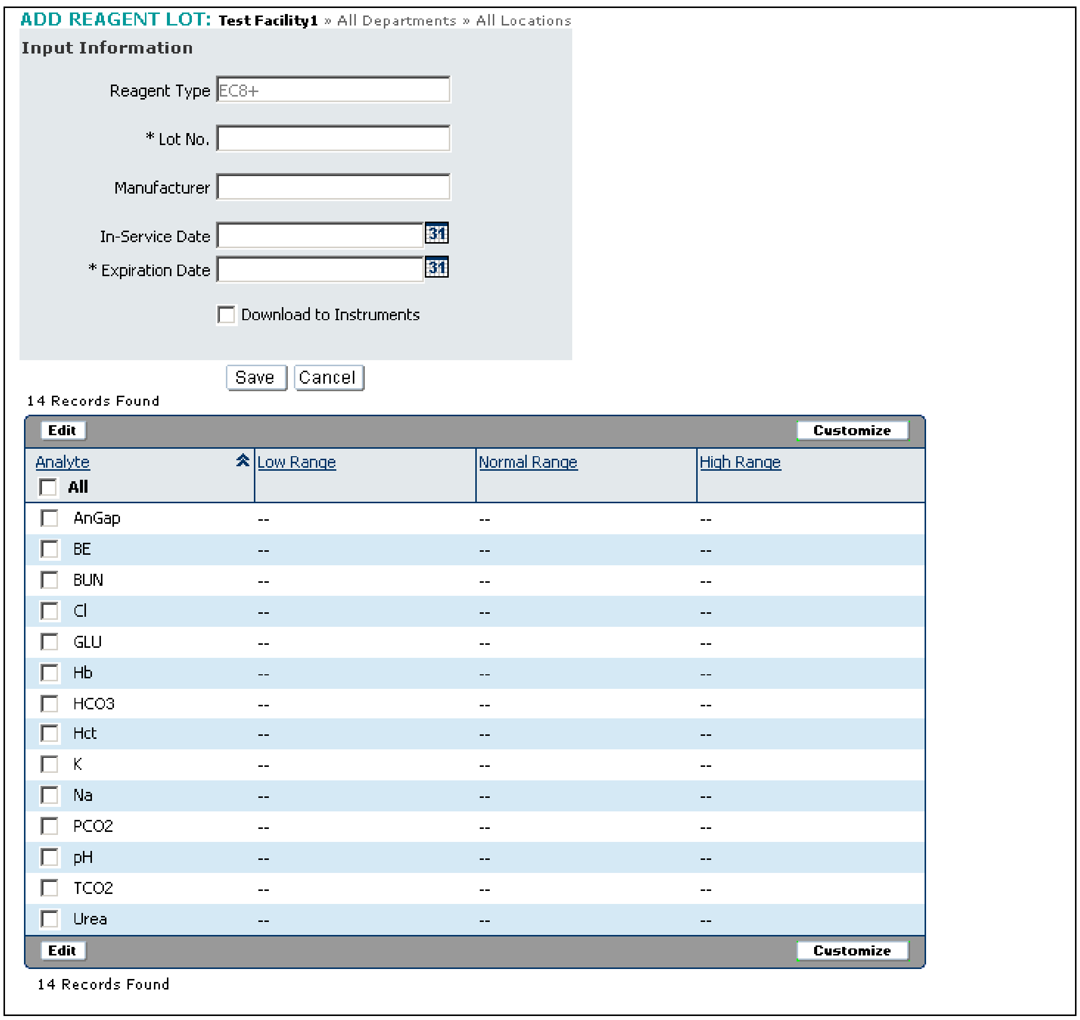
Field	Description
In-Service Date	Click on the calendar icon to display the pop-up calendar and click on a date. The **In-Service Date** field automatically displays the selected date.
***Expiration Date**	Click on the calendar icon to display the pop-up calendar and click on a date. The **Expiration Date** field automatically displays the selected date – ***required.***

7. Click on the checkbox to allow the Reagent Lot to be downloaded to instruments (if applicable).

☐ **Download To Instruments**

> ***Note****: The application does not restrict the number of reagent lots selected for Download To Instruments. Be sure to download only reagent lots currently in use to ensure that instruments receive the appropriate reagent download list. Any reagent lot not currently in use should be removed from the download list.*

8. Click the **Save** button to save the data. The Reagent Lots screen appears with the new lot displayed in the Reagent Lots table or Click the **Cancel** button to cancel the add action without saving.



To add Analyte Ranges (from the **Add Reagent Lot** screen):

1. Select one or more records from the Table by clicking the box(es) in the **Analyte** column.

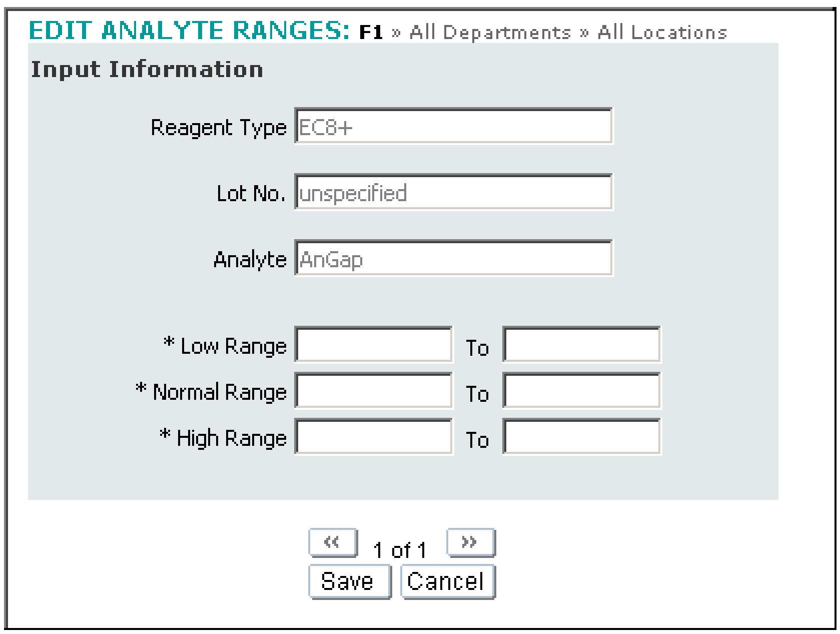
2. Click the **Edit** action button.

The Edit Analyte Ranges screen appears with the information stored in the database for the first selected lot record. If multiple lot records are selected each record is displayed on a separate page.

All of the fields are disabled except for the Range fields.

3. Edit the Range fields.

4. Click the **Save** button to save the edited data or Click the **Cancel** button to cancel the edit action without saving.



Edit a Reagent Lot

To **edit** a single reagent lot or multiple reagent lots in a Facility, Department or Location:

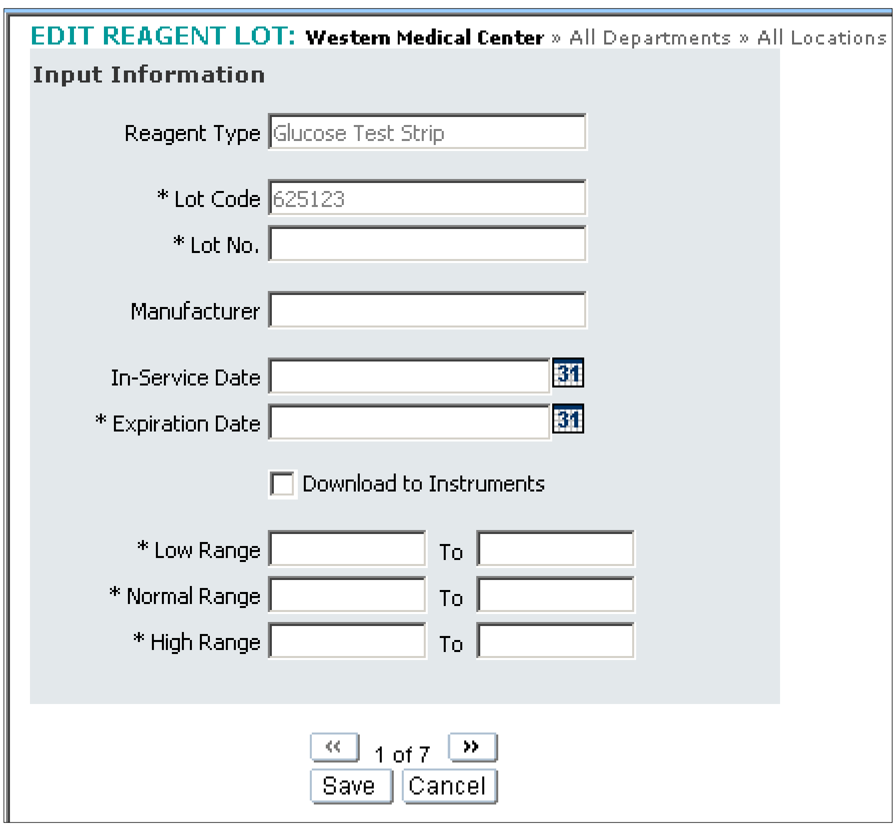
1. Click the box(es) in the Lot No. column.
2. Click the **Edit** action button.

To **edit** all reagent lots in a Facility, Department or Location:

1. Click the box marked **All** in the Lot No. column header.
2. Click the **Edit** action button.

The **Edit Reagent Lot** screen appears with the information stored in the database for the first selected lot record. If multiple lot records are selected each record is displayed on a separate page.

All other entry fields can be edited and will be stored in the database.



* Reagent Type and Lot Code are displayed in read-only fields and cannot be edited. The Expiration Date and the values for the Low, Normal and High Ranges are ***required*** entry fields.

3. Click the **Save** button to save the edited data or Click the **Cancel** button to cancel the edit action without saving.

To **Edit** Multi Analyte Ranges (from the **Edit Reagent Lot** screen):

1. Select one or more records from the Table by clicking the box(es) in the **Analyte** column.

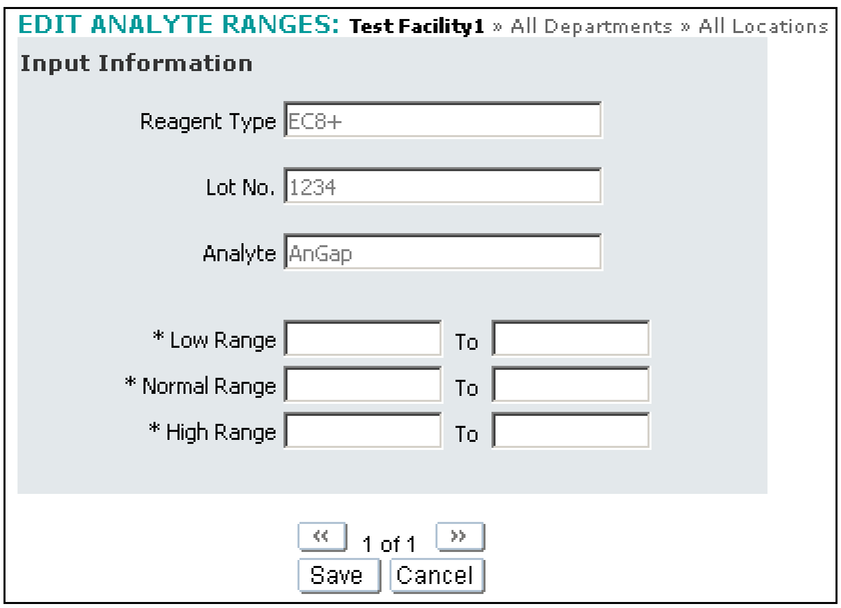
2. Click the **Edit** action button.

The Edit Analyte Ranges screen appears with the information stored in the database for the first selected lot record. If multiple lot records are selected, each record is displayed on a separate page.

All of the fields are disabled except for the Range fields.

3. Fill in the Range fields.

4. Click the **Save** button to save the edited data or Click the **Cancel** button to cancel the edit action without saving.



Delete a Reagent Lot

To **delete** a single reagent lot or multiple reagent lots in a Facility, Department or Location:

1. Click the box(es) in the Lot No. column.

2. Click the **Delete** action button.

To **delete** all reagent lots in a Facility, Department or Location:

1. Click the box marked **All** in the Lot No. column header.

2. Click the **Delete** action button.

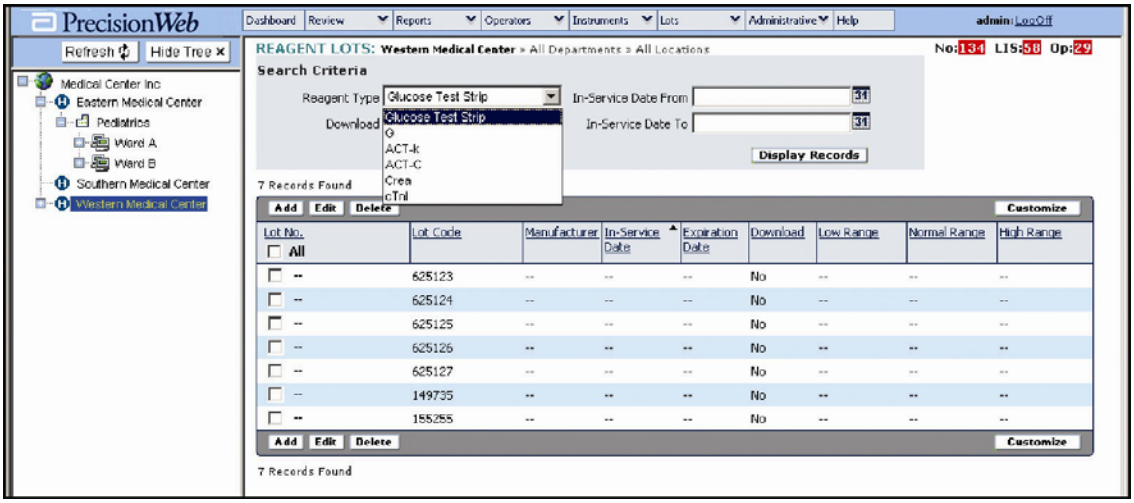
> ***Note:*** *The delete action will remove the reagent lot only if* ***no*** *test data exists in the active database for that lot. If the selected reagent lot is associated with test data, the reagent lot cannot be deleted.*

Using the Filter Options

To **find** reagent lots by Reagent Type:

1. Select from the dropdown list in the Reagent Type field.
2. Click the **Display Records** button.

The **Reagent Lots** screen displays the Reagent Lots table based on results that match the Reagent Type chosen from the dropdown list.



To **find** reagent lots by In-Service Date:

1. Click on the calendar icon to display the pop-up calendar.
2. Click on a date for the **From** and/or **To** date fields.
3. Click the **Display Records** button.

The **Reagent Lots** screen displays the Reagent Lots table based on results that match the dates entered in the From and To date fields.

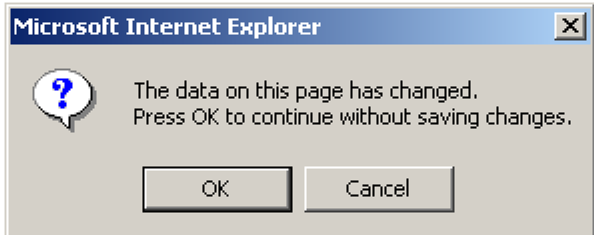
To **find** reagent lots by Download status:

1. Select from the Download dropdown list.
2. Click the **Display Records** button.

Criteria	Options	Description
Download	**All**	Displays reagent lots regardless of their download status.
	Yes	Only displays reagent lots selected for download to instruments.
	No	Only displays reagent lots not currently selected to download to instruments.

Warning Messages

If a different menu option is selected before saving new or edited lot information, the following warning message is displayed:

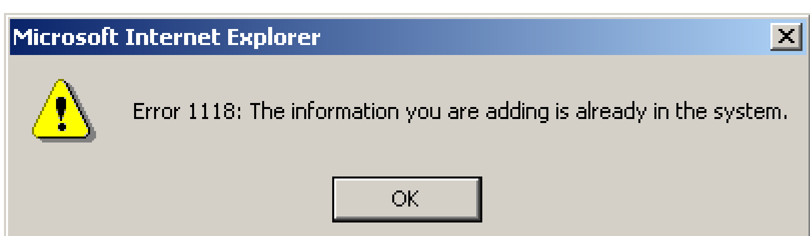


- Click the **OK** button to cancel the data entered, or
- Click the **Cancel** button to clear the message and return to the add or edit screen to save the data.

If a required field is missing when lot information is saved, the following warning message is displayed with a reference to the specific required field (Lot Code, Lot No., Expiration Date and/or value for Low, Normal and High Range) that is missing:

- Click the **OK** button to clear the message and enter the required information.

If the Lot Number entered already exists in the database, the following error message is displayed:

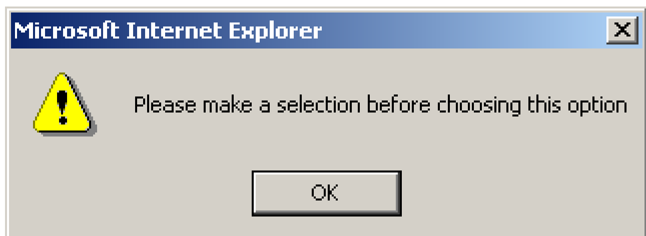


- Click the **OK** button to clear the message.

If data entered in the Expiration Date field is not valid, the following warning message is displayed:

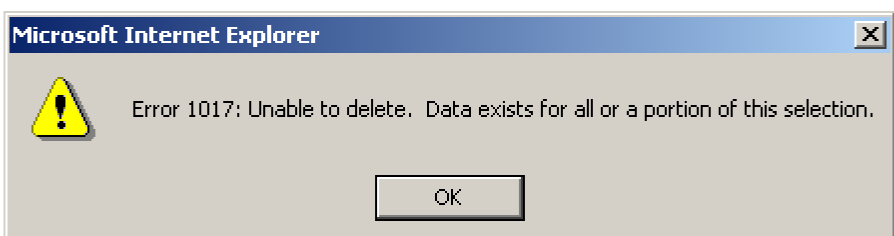
- Click the **OK** button to clear the message and enter the valid information.

If records are not selected from the table before clicking the **Edit** or **Delete** action buttons, the following warning message is displayed:



- Click the **OK** button to clear the message and make a selection.

If a lot is selected for deletion with test data stored in the active database, the following error message is displayed:



- Click the **OK** button to clear the message.

9. Administrative

Administrative Overview

The **Administrative** menu option provides access to eleven screens for use in managing the Location Tree, User Accounts, the Database and Instrument Test Panels. The four **Organization Setup** screens allow you add or edit Organization, Facility, Department and Location information to the Tree. The **Facility Settings** screen allows you to manage facility-specific settings such as LIS result forwarding, notifications, warnings and review comments. The two **User Setup** screens allow you to create a new user or find and edit existing QCM user accounts and permissions. The **My Profile** screen allows you to set your preferred startup screen, adjust which alarm types to display or change your password. The two **Database** screens allow you to import operator information or check the database status. The **Panels** screen allows you to manage multi analyte instrument test panels. Each screen is available only if your account was granted this permission by the Administrator or POCC.

Organization Setup Screen

Administrative: Organization Setup >> Organization

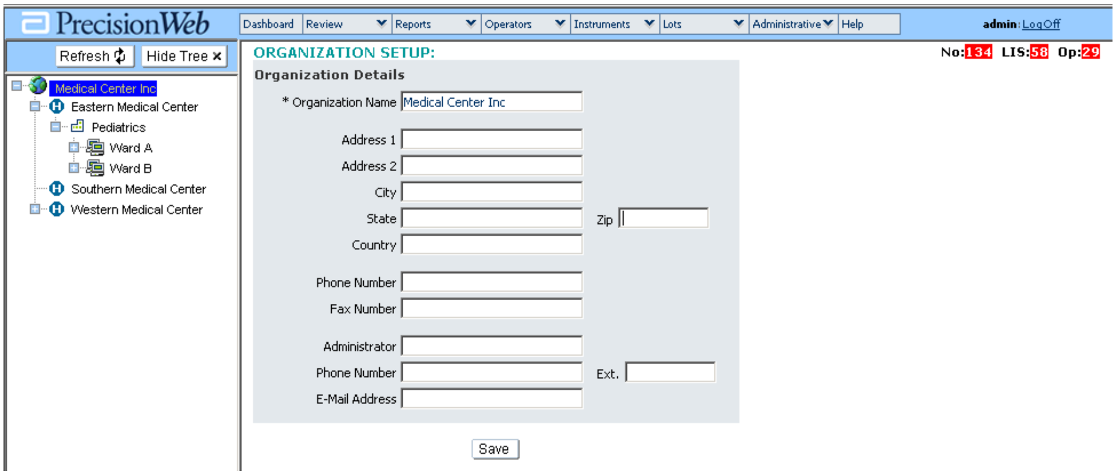
The **Organization Setup** screens allow the Administrator or POCC to setup and maintain the information for the Facilities, Departments and Locations within the Organization.

- Additions, edits and deletions made to a Facility, Department or Location name are reflected in the **Location Tree**.
- When the system is first installed, the default for the Organization Name appears in the Tree and in the entry field as **Organization**.
- Only one organization is supported by the system.
- The Organization name and associated details can be edited.

Name an Organization

To **name** an Organization:

1. Move the mouse cursor over **Administrative** to display the menu options.



2. Move the mouse cursor over the **Organization Setup** option until the submenu appears and click on the **Organization** option.

* Organization Name is a ***required*** entry field.

3. Enter the name of the organization in the **Organization Name** field in the **Organization Details** table. Enter additional organization details in the associated fields.

4. Click the **Save** button to save the data.

    - The information entered will be stored in the database and the **Organization** name will appear in the Tree.

Edit Organization Name and Details

To **edit** information for an Organization:

1. Move the mouse cursor over **Administrative** to display the menu options.

2. Move the mouse cursor over the **Organization Setup** option until the submenu appears and click on the **Organization** option.

3. Click on the **Organization** name in the Tree so the details for the organization appear on the screen.

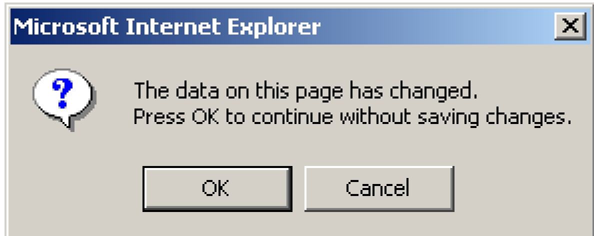
4. Add to or edit the fields in the **Organization Details** table.

5. Click the **Save** button to save the new or edited data.

The **Organization Setup** screen displays the information currently in the database.
* Organization Name is a ***required*** entry field.

Warning Messages

If a different menu option is selected before saving the **Organization Setup** information, the following warning message is displayed:



- Click the **OK** button to cancel the data entered and move to the selected menu option, or
- Click the **Cancel** button to clear the message and return to the **Organization Setup** screen.

If the ***required*** **Organization Name** field is empty in the **Organization Setup** screen, the following warning message is displayed:

- Click the **OK** button and enter the required information.

Facility Setup Screen

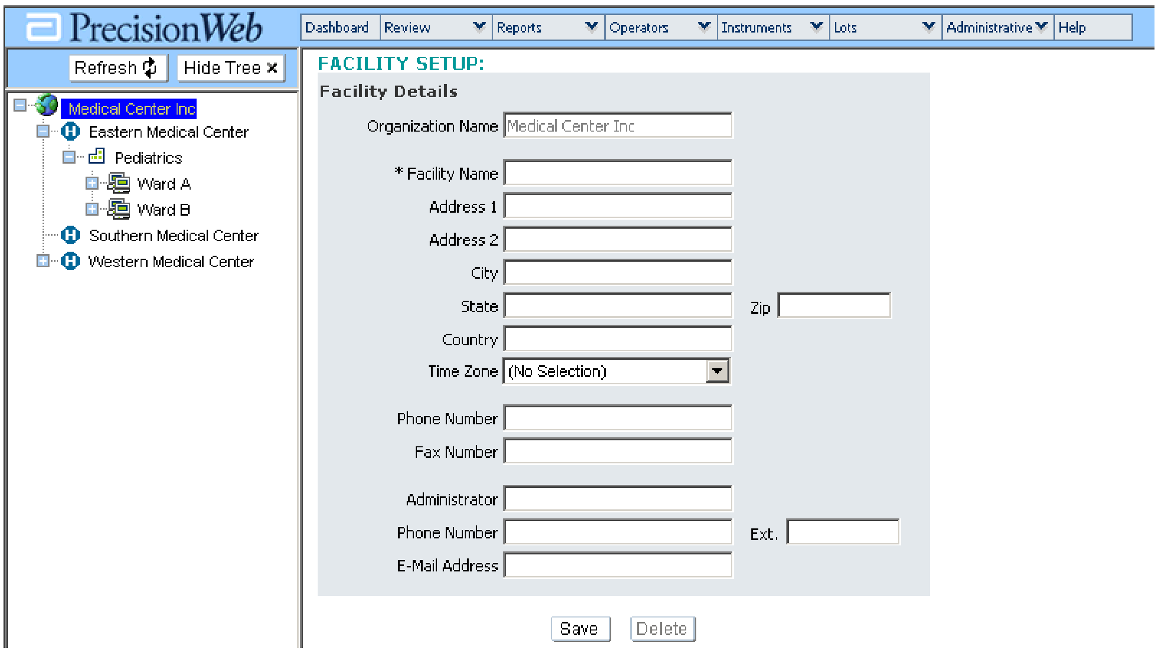
Administrative: Organization Setup >> Facility

Add a Facility Name and Details

To **add** a Facility to the Organization:

1. Move the mouse cursor over **Administrative** to display the menu options.

2. Move the mouse cursor over the **Organization Setup** option until the submenu appears and click on the **Facility** option.



3. Click on the **Organization** name in the Tree.

   * Facility Name is a ***required*** entry field.

4. Enter the Facility name and associated information in the fields in the **Facility Details** table.

5. Click the **Save** button to save the new data.

   - The **Facility Setup** screen displays the Organization name in a read-only field.
   - The information entered will be stored in the database and the **Facility** name will appear in the Tree.

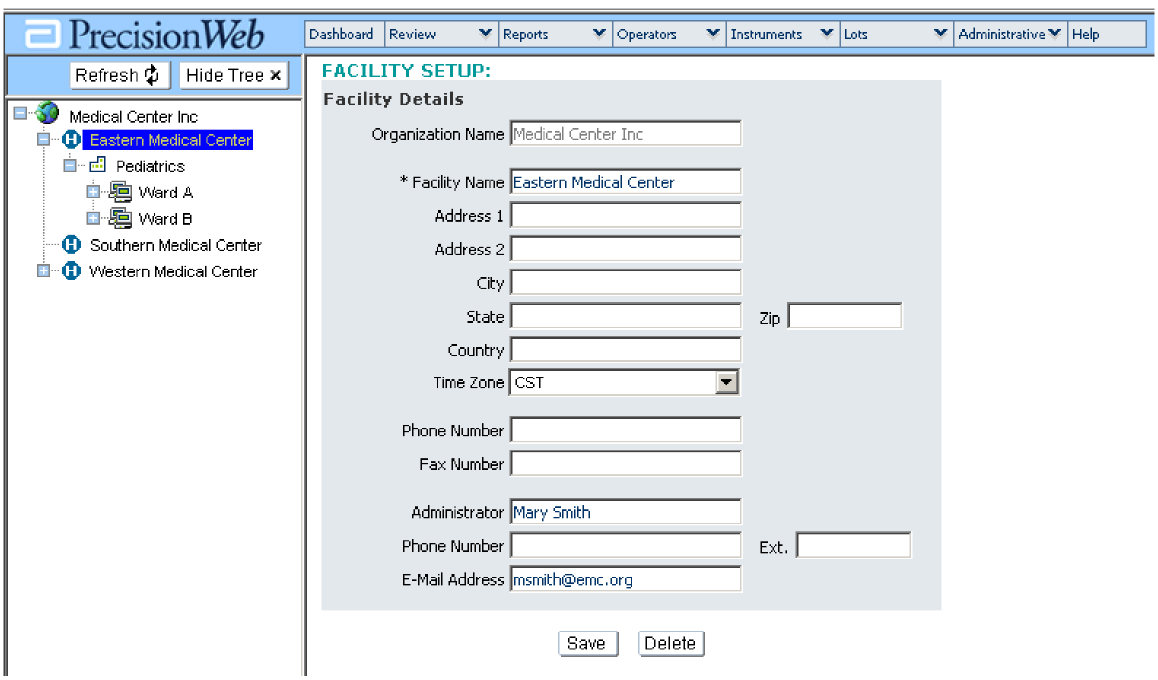
Note: *The* ***Time Zone*** *dropdown list appears in Facility, Department and Location Setup screens and allows you to select the time zone for a specific facility, department or location, which will be displayed with test times associated with those locations. If no setting is specified, then "(No Selection)" appears in the field and no time zone is appended to the test times.*

Edit Facility Name and Details

To **edit** a Facility in the Organization:

1. Move the mouse cursor over **Administrative** to display the menu options.
2. Move the mouse cursor over the **Organization Setup** option until the submenu appears and click on the **Facility** option.
3. Click on a **Facility** name in the Tree.
4. Add to or edit the fields in the **Facility Details** table.
5. Click the **Save** button to save the new or edited data.

The **Facility Setup** screen displays the Organization name in a read-only field and the Facility information currently in the database.



* The Facility Name is a ***required*** entry field.

Delete a Facility

To **delete** a Facility from the Organization:

1. Move the mouse cursor over **Administrative** to display the menu options.
2. Move the mouse cursor over the **Organization Setup** option until the submenu appears and click on the **Facility** option.

3. Click on a **Facility** name in the Tree.

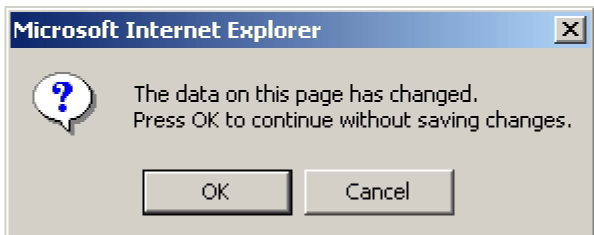
4. Click the **Delete** button to remove the Facility name from the database and the Tree.

The **Facility Setup** screen displays the Organization name in a read-only field and the Facility information currently in the database.

Note: *The delete action will remove the Facility Name only if there is* ***no*** *data (instruments, test results, terminal servers, operators or lots) associated with the specified Facility in the active database. If a Department or Location is associated with Facility, even if there is no data, the Facility cannot be deleted.*

Warning Messages

If a different menu option is selected before saving the Facility Setup information, the following warning message is displayed:



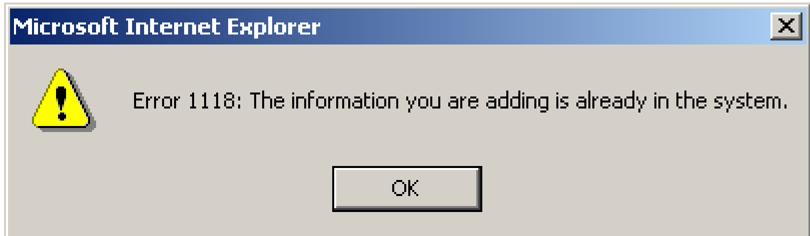
- Click the **OK** button to cancel the data entered.

- Click the **Cancel** button to clear the message and return to the **Facility Setup** screen to save the data.

If the ***required*** **Facility Name** field is empty in the Facility Setup screen, the following warning message is displayed:

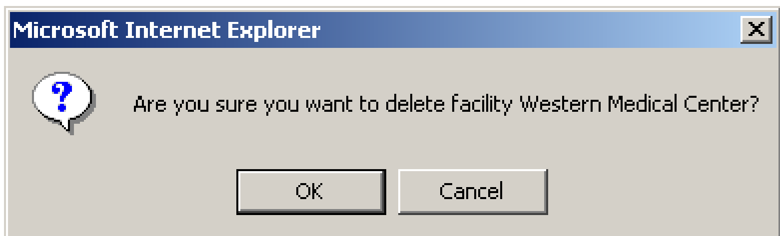
- Click the **OK** button to clear the message and enter the required information.

If the Facility name entered already exists in the database, the following error message is displayed:



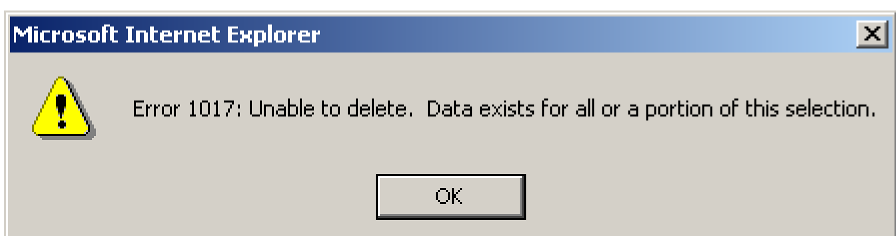
- Click the **OK** button to clear the message and edit the Facility name.

If a Facility name is selected for deletion, the following warning message is displayed:



- Click the **OK** button to delete the facility.
- Click the **Cancel** button to cancel the delete action.

If a Facility name is selected for deletion with data stored in the active database, the following error message is displayed:



- Click the **OK** button to clear the message.

Department Setup Screen

Administrative: Organization Setup >> Department

Add a Department Name and Details

To **add** a Department to a Facility:

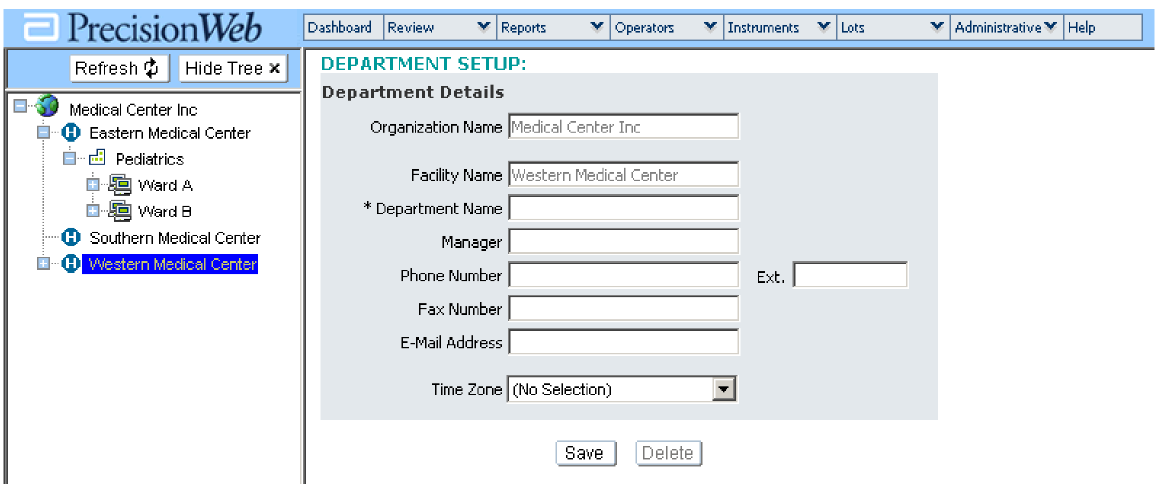
1. Move the mouse cursor over **Administrative** to display the menu options.

2. Move the mouse cursor over the **Organization Setup** option until the submenu appears and click on the **Department** option.

3. Click on a **Facility** name in the Tree.

4. Enter the Department name and associated information in the fields in the **Department Details** table.

5. Click the **Save** button to save the new data.



* Department Name is a ***required*** entry field.

- The **Department Setup** screen appears with the Organization and Facility names displayed in read-only fields.

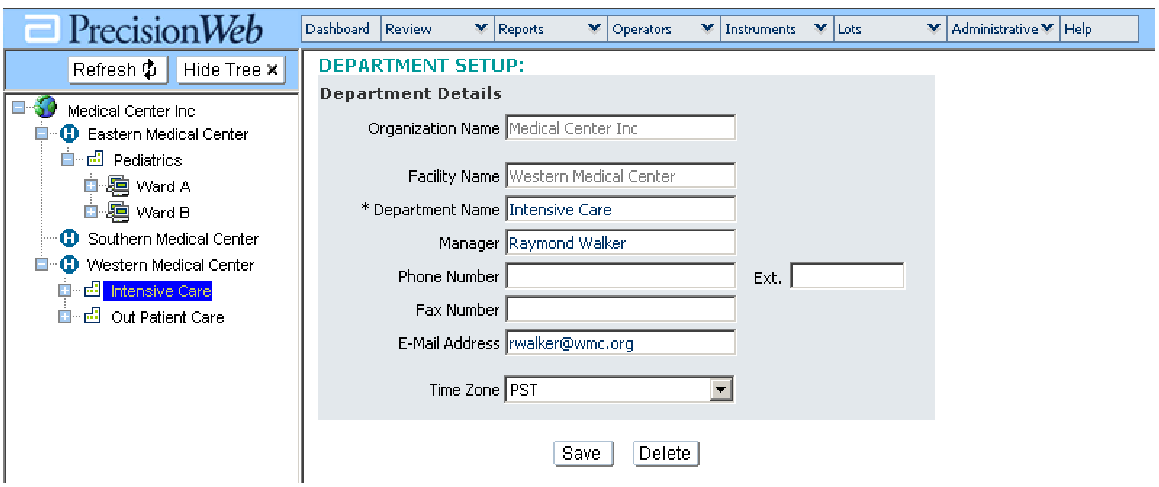
- The information entered will be stored in the database and the **Department** name will appear in the Tree.

Edit Department Name and Details

To **edit** a Department in a Facility:

1. Move the mouse cursor over **Administrative** to display the menu options.
2. Move the mouse cursor over the **Organization Setup** option until the submenu appears and click on the **Department** option.
3. Click on a **Department** name in the Tree.
4. Add to or edit the fields in the **Department Details** table.
5. Click the **Save** button to save the new or edited data.

The **Department Setup** screen displays the Organization and Facility names in read-only fields and the Department information currently in the database.



* Department Name is a ***required*** entry field.

Delete a Department Name

To **delete** a Department in a Facility:

1. Move the mouse cursor over **Administrative** to display the menu options.

2. Move the mouse cursor over the **Organization Setup** option until the submenu appears and click on the **Department** option.

3. Click on a **Department** name in the Tree.

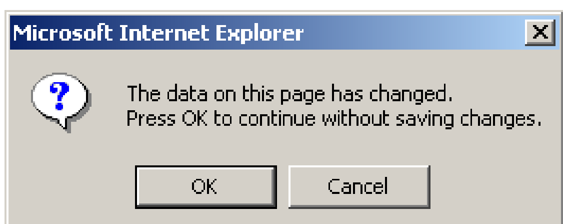
4. Click the **Delete** button to remove the Department name from the database and the Tree.

The **Department Setup** screen displays the Organization and Facility names in read-only fields and the Department information currently in the database.

Note: *The delete action will remove the Department Name only if there is* ***no*** *data (instruments, test results, terminal servers, operators or lots) associated with the specified Department in the active database. If a Location is associated with Department, even if there is no data, the Department cannot be deleted.*

Warning Messages

If a different menu option is selected before saving the Department Setup information, the following warning message is displayed:



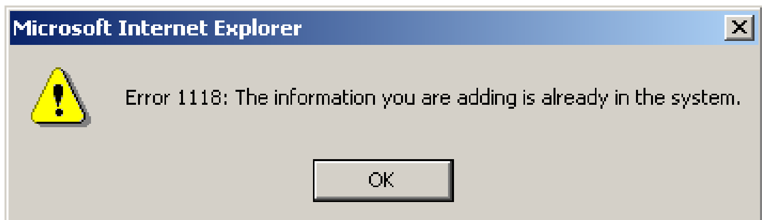
- Click the **OK** button to cancel the data entered.

- Click the **Cancel** button to clear the message and return to the **Department Setup** screen to save the data.

If the ***required*** **Department Name** field is empty in the Department Setup screen, the following warning message is displayed:

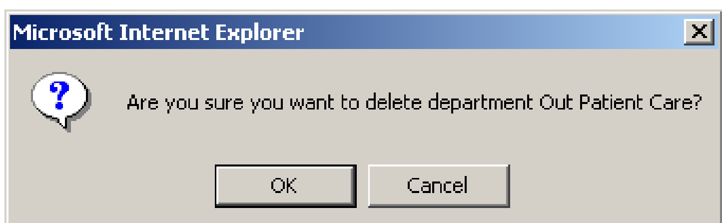
- Click the **OK** button to clear the message and enter the required information.

If the Department name entered already exists in the database in the same Facility, the following error message is displayed:



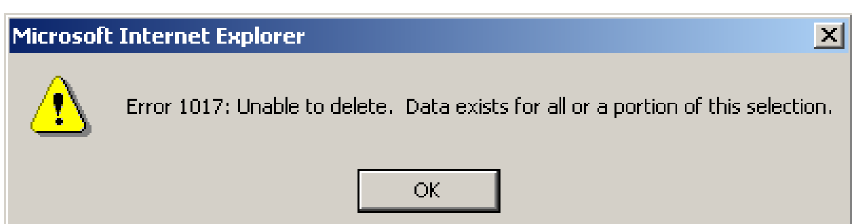
- Click the **OK** button to clear the message and edit the Department name.

If a Department name is selected for deletion, the following warning message is displayed:



- Click the **OK** button to delete the department.
- Click the **Cancel** button to cancel the delete action.

If a Department name is selected for deletion with test data stored in the active database, the following warning message is displayed:



- Click the **OK** button to clear the message.

If the Department Setup submenu option is selected and the **Organization** is highlighted in the Tree, the following warning message is displayed:

- Click the **OK** button to clear the message and select a Facility or a Department from the Tree.

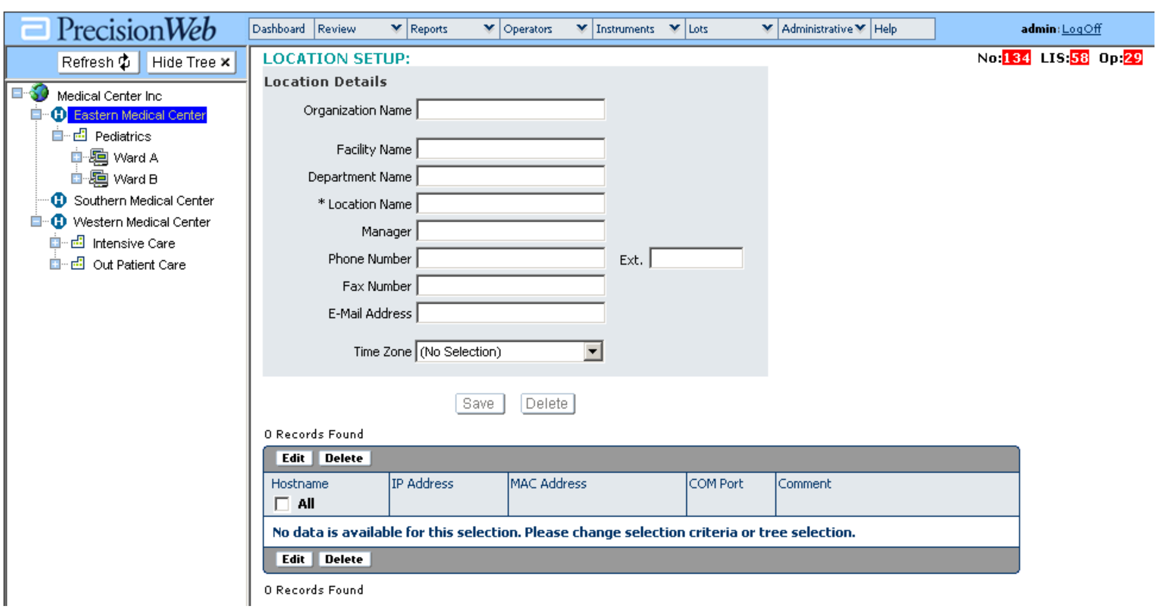
Location Setup Screen

Administrative: Organization Setup >> Location

Add a Location Name and Details

To **add** a Location to a Department:

1. Move the mouse cursor over **Administrative** to display the menu options.
2. Move the mouse cursor over the **Organization Setup** option until the submenu appears and click on the **Location** option.
3. Click on a **Department** name in the Tree.
4. Enter the Location name and associated information in the in the fields in the **Location Details** table.
5. Click the **Save** button to save the new data.



* The Location Name is a ***required*** entry field.

- The **Location Setup** screen appears with the Organization, Facility and Department names displayed in read-only fields.

- The information entered will be stored in the database and the **Location** name will appear in the Tree.

Edit Location Name and Details

To **edit** a Location:

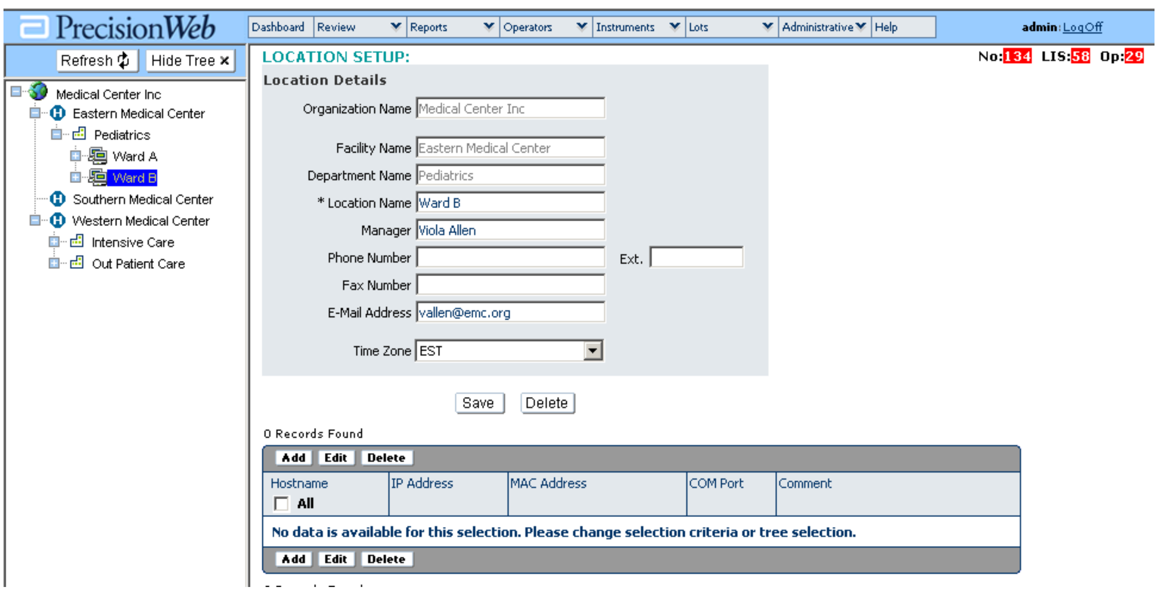
1. Move the mouse cursor over **Administrative** to display the menu options.

2. Move the mouse cursor over the **Organization Setup** option until the submenu appears and click on the **Location** option.

3. Click on a **Location** name in the Tree.

4. Add to or edit the fields in the **Location Details** table.

5. Click the **Save** button to save the new or edited data.



* Location Name is a ***required*** entry field.

The **Location Setup** screen displays the Organization, Facility and Department names in read-only fields and the Location information currently in the database.

Delete a Location Name and Information

To **delete** a Location in a Department:

1. Move the mouse cursor over **Administrative** to display the menu options.

2. Move the mouse cursor over the **Organization Setup** option until the submenu appears and click on the **Location** option.

3. Click on a **Location** name in the Tree.

4. Click the **Delete** button to remove the Location name from the database and the Tree.

   - The **Location Setup** screen displays the Organization, Facility and Department names in read-only fields and the Location information currently in the database.

> ***Note:*** *The delete action will remove the Location Name only if there is* ***no*** *data (instruments, test results, terminal servers, operators or lots) associated with the specified Location in the active database.*

Add a Terminal Server to a Location

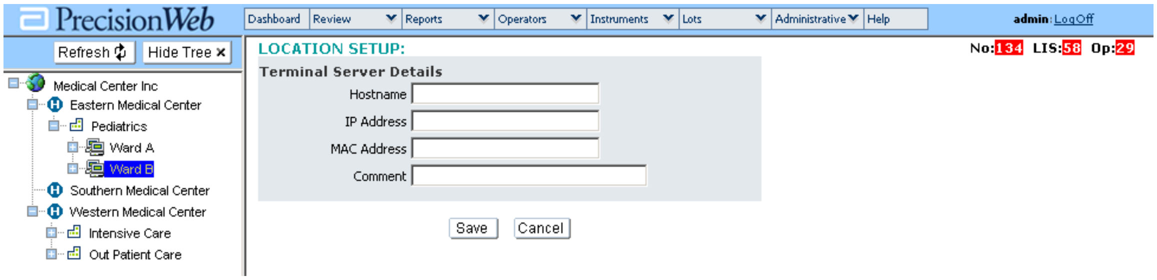
To add a Terminal Server to a Location, identify the Terminal Server by adding at least one of the Terminal Server's identifiers (Hostname, IP Address, or MAC Address) to the Location:

From the **Location Setup** screen,

1. Click on a **Location** name in the Tree.
2. Click the **Add** button on the **Action Bar** of the **Hostname/IP Address** table to display the **Terminal Server Details** screen.
3. Enter a Hostname, IP Address or MAC Address for the specified Location.
4. The **Comment** field allows the Administrator to record a comment and is an optional field.
5. Click the **Save** button to save the new data and return to the **Location Setup** screen, or Click the **Cancel** button to return to the **Location Setup** screen without saving the new data.

Notes:

- *In a DHCP environment, you only should add the Hostname. The IP Address should update after approximately 5 – 10 minutes after Hostname is initially populated or after any IP Address changes.*
- *If DHCP is being used, network topology and configuration will determine if the Hostname must be added as a Fully Qualified Name (FQN).*
- *If IP Addresses are statically assigned the IP Address and Hostname should be added to the Location.*
- *The next time* the *instrument uploads data from this location to the database, the remaining fields are detected and automatically refreshed.*



The **Location Setup** screen displays the information stored in the database for the Location and the action button to add a Hostname, IP Address and/or a MAC address.

* You must fill in at least one of the specified fields: Hostname, IP Address or MAC-Address.

Edit Terminal Server Details

To edit terminal server details for a Location:

From the **Location Setup** screen,

1. Click on a **Location** name in the Tree.

2. Click on the box in the Hostname column to select the record. Click the **Edit** action button to display the **Edit Terminal Server** screen.

3. Edit the Hostname, IP Address and/or MAC Address.

4. The **Comment** field allows the Administrator to record a comment and is an optional field.

5. Click the **Save** button to save the edited data and return to the **Location Setup** screen, or Click the **Cancel** button to return to the **Location Setup** screen without saving the new data without saving.

The **Location Setup** screen displays the information stored in the database for the Location and the current Hostname/IP Address and/or MAC Address information.

* Either a Hostname, an IP Address or MAC Address is ***required***.

Delete a Terminal Server

To delete a terminal server for a location:

From the **Location Setup** screen,

1. Click on a **Location** name in the Tree.

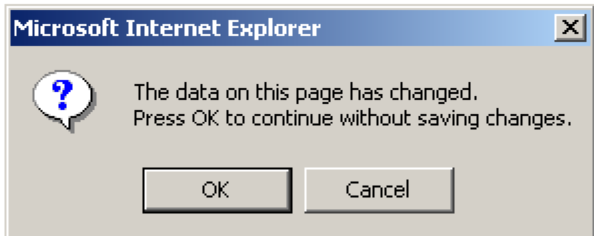
2. Click on the box in the Hostname column to select the record and click the **Delete** action button.

3. Click the **OK** button to delete the Hostname/IP Address or MAC Address of the selected Location.

> ***Note:*** *The delete action will remove the terminal server entry for the specified Location.*

Warning Messages

If a different menu option is selected before saving the Location Setup information, the following warning message is displayed:

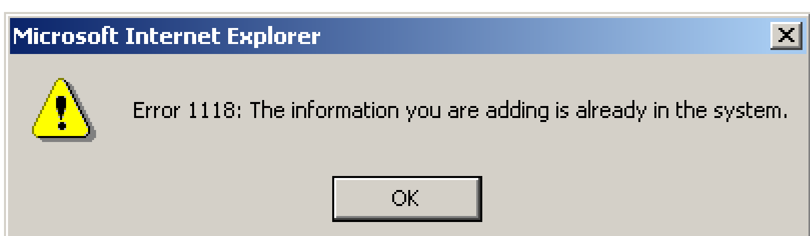


- Click the **OK** button to cancel the data entered, or
- Click the **Cancel** button to clear the message and return to the **Location Setup** screen to save the data.

If the ***required*** field for the Location Name is missing on the **Location Setup** screen, the following warning message is displayed:

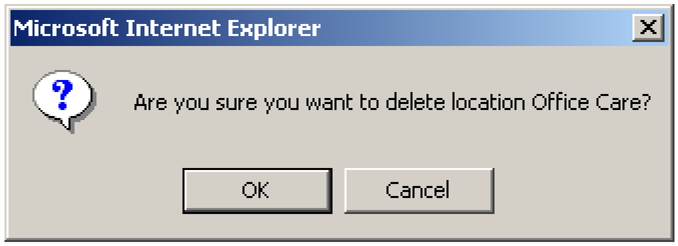
- Click the **OK** button to clear the message and enter the required information.

If the Location name entered already exists in the database in the same Department, the following error message is displayed:



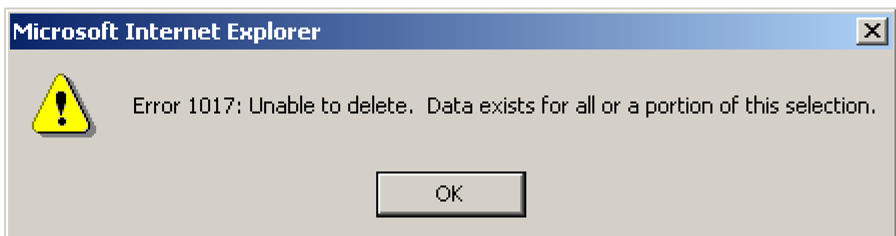
- Click the **OK** button to clear the message and edit the Location name.

If a Location Name is selected for deletion, the following warning message is displayed:



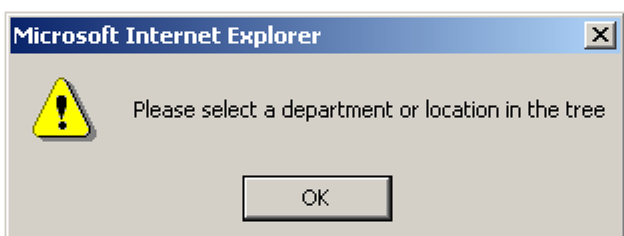
- Click the **OK** button to delete the Location, or
- Click the **Cancel** button to cancel the delete action.

If a Location name is selected for deletion with test data stored in the active database, the following error message is displayed:



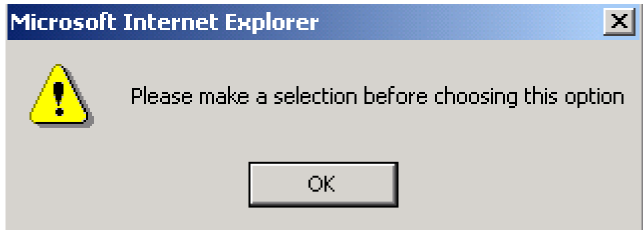
- Click the **OK** button to clear the message.

If the Location Setup submenu option is selected and the **Organization** or a **Facility** is highlighted in the Tree, the following warning message is displayed:



- Click the **OK** button to clear the message and select a Department or Location from the Tree.

If no Hostname/IP Address or MAC Address record is selected before clicking the **Edit** or **Delete** action button, the following warning message is displayed:



- Click the **OK** button to clear the message and select a record from the table.

Facility Settings

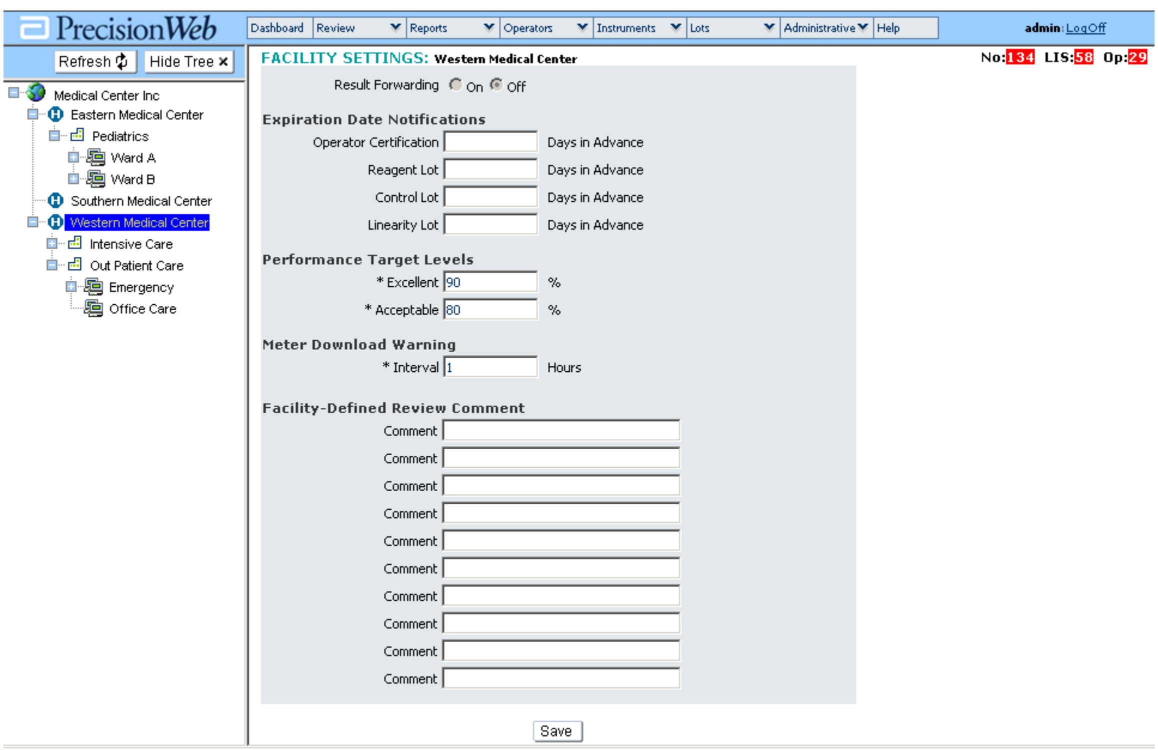
Administrative>>Facility Settings

The **Facility Settings** screen allows you to select the settings for a Facility, including:

- Selecting a Result Forwarding option,
- Selecting when advance warning alarms are displayed on the Dashboard, and
- Setting Operator Performance Target Levels for passing QC.
- If more than one Facility exists within the Organization, each Facility must be configured separately, as settings are Facility specific.

To select the settings for a **Facility**:

1. Move the mouse cursor over **Administrative** to display the menu options and click on the **Facility Settings** option.
2. Click on a **Facility** Name in the Tree.
3. Enter settings for the specified Facility.



4. Click the **Save** button to save the data.

The **Facility Settings** screen displays the Facility Name selected in the screen title.

Select settings from the following options:

Setting	Description
Result Forwarding	**On** - forwards test results to the LIS/HIS for processing. **Off** - holds test results in a queue (detail not visible in the UI).
Expiration Date Notifications:	
Operator Certification	Enter the number of days for advance warning notification.
Reagent Lot	Enter the number of days for advance warning notification.
Control Lot	Enter the number of days for advance warning notification.
Linearity Lot	Enter the number of days for advance warning notification.
Performance Target Levels:	
*Excellent	Enter the target level for Excellent QC performance.
*Acceptable	Enter the target level for Acceptable QC performance.
Meter Download Warning	
*Interval	Enter the number of hours allowed between instrument uploads.

> ***Note:*** *The summary screen will display red highlighted text in the Last Upload Date/Time field if the specified upload time limit is exceeded. The Meter Download Warning Interval setting is independent of instrument Upload Interval setting.*

Facility-Defined Review Comment	These additional fields will allow you to specify up to 10 Review Comments that will then be displayed in the Predefined Review Comment list of the Edit Result screen. Only entered comments will be displayed in the list. You can delete a comment by emptying a field and selecting Save. You may leave fields empty. The empty fields will be ignored when displaying the list of **Predefined Review Comments.** If a Review Comment is deleted, however, the results to which this comment was attached will still display the comment.

The settings selected will be stored in the database.

* The QC Performance Target Levels of Excellent and Acceptable and the Meter Download Warning Interval are ***required*** entry fields.

New User Setup Screen

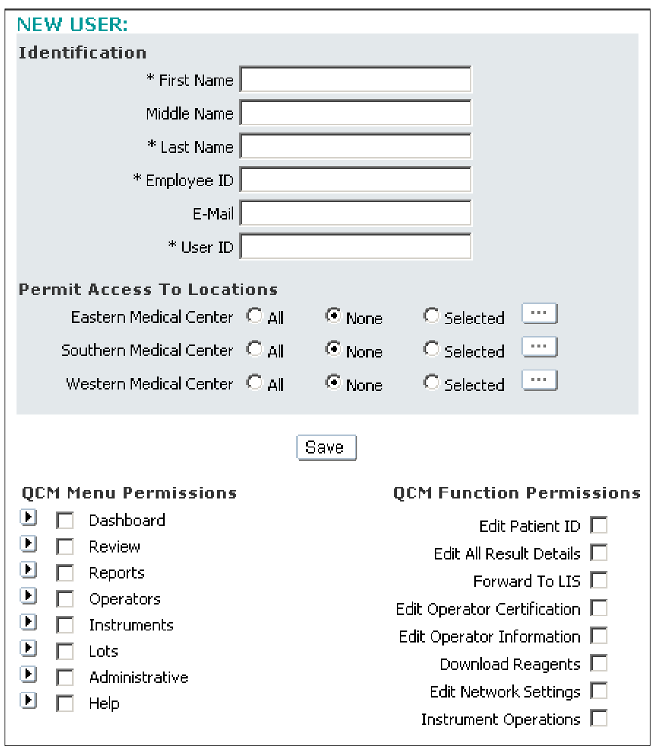
Administrative: User Setup >> New

- The **New User** screen allows the Administrator or POCC to add users to the system.
- A user is granted permission to access locations and menu options in the system to meet the user's responsibilities within the organization.
- This screen also allows the Administrator or POCC to permit the user to perform specific functions, such as edit records and download reagent lots.

Add a new user

To **add** a new user:

1. Move the mouse cursor over **Administrative** to display menu options.
2. Move the mouse cursor over the **User Setup** option until the submenu appears.
3. Click the **New** option.



The **New User** screen has three sections:

- Identification
- Permit Access to Locations
- QCM3 Menu Permissions and QCM3 Function Permissions

Identification

Enter the identification information for the new user.

* First Name, Last Name, Employee ID and User ID are ***required*** entry fields.

> ***Note:*** *The application automatically enters the first five characters of the user's Last Name and the initial character of the First and Middle Names for the new user's User ID. The default User ID can be edited prior to saving the new user entry.*

Permit Access to Locations

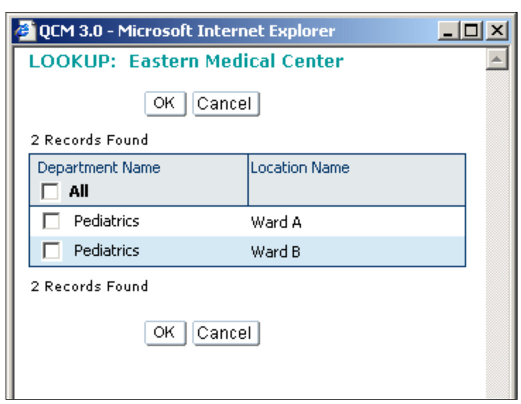
The selections made in this section determine the Locations displayed in the Tree. If the user is not granted permission to access a specific Facility, Department or Location, it will not appear in the Tree.

To permit a user **Access** to Facilities in the organization:

- Click on the **All** button to allow the user access to all locations in that Facility.
- Click on the **None** button to deny the user access to a specific Facility and its Departments and Locations.
- Click on the **Selected** button to allow the user access to selected Locations within a Facility, then:

1. Click the 

 button. A pop-up browser window appears with a list of associated Departments and Locations for the selected Facility.



2. Click on the box in the Department Name column to allow the user access to associated Location listed in the Location Name column and click the **OK** button, or
3. Click the **Cancel** button to cancel access to the selected locations and close the pop-up browser window.

QCM3 Menu Permissions

The selections made in this section determine the options displayed in the **Menu Bar**. If the user is not granted permission to access a menu or sub-menu option it will not appear in the Menu Bar.

- To permit a user access to **all** associated menu options click on the checkbox to the left of the menu option.

- To permit a user access to **some** associated menu options click on the checkbox to the left of the menu option, then click on the arrow to display the associated menu options. The arrow points down when the associated menu are displayed. The arrow points to the right if the associated menu options are hidden from view.

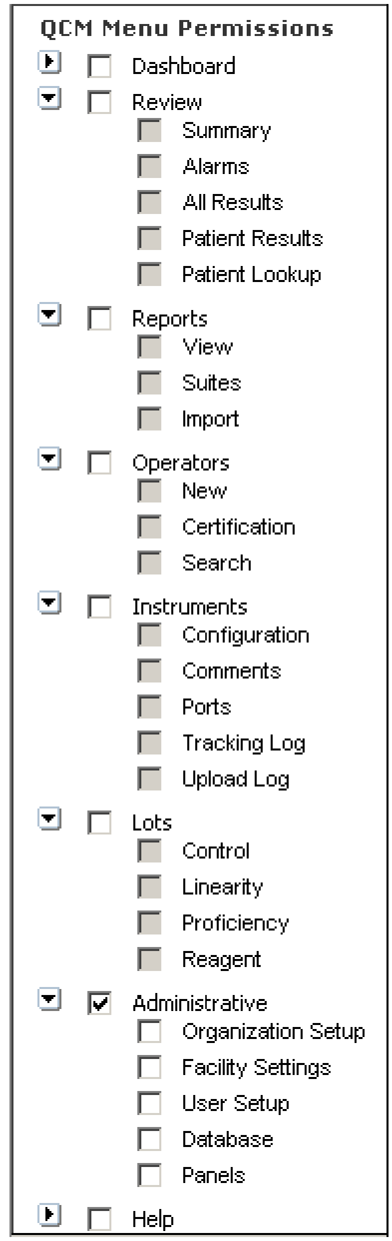
  For example, the **Review** menu option includes the following sub-menu options:
  - Summary
  - Alarms
  - All Results
  - Patient Results
  - LIS Patient Lookup

- Click on the checkbox to select/deselect the associated options.

- A checked box means the user has access to that menu option.

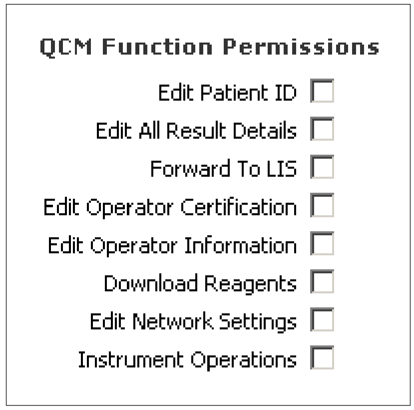
- An unchecked box means the user is denied access to that menu option.

- The Administrative menu option will remain checked to assign the My Profile screen even if all sub-menu options remain unchecked.



QCM3 Function Permissions

The selections made in this section allow the user to perform specific functions in the system. If the user does not have permission to perform a function, the corresponding Action Button is not displayed in the Action Bar.



- Click on the checkbox to allow the user to perform that function.
- An unchecked box means the user is not allowed to perform that function.

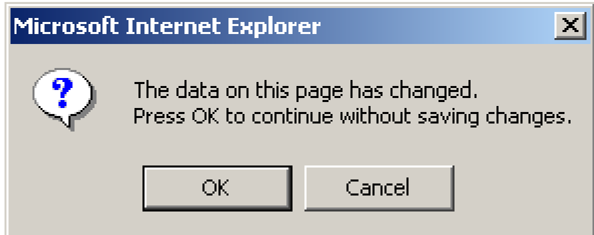
Edit Patient ID	☐	Allows user permission to edit the Patient ID associated to a record. This option is disabled if **Edit All Result Details** (below) is selected.
Edit All Result Details	☐	Allows user permission to edit all result details (including Patient ID) with the exception test date and time.
Forward to LIS	☐	Allows user permission to forward results to the LIS/HIS and Bypass (LIS/HIS) Error Check.
Edit Operator Certification	☐	Allows user permission to add or edit Operator information, including home Location. User may also add or edit (ReCertify) instrument certification.
Edit Operator Information	☐	Allows user permission only to add or edit Operator information, including home Location.
Download Reagents	☐	Allows user permission to add reagent lots to instrument reagent lot download list.
Edit Network Settings	☐	Allows user permission to add, edit and delete terminal server information.
Instrument Operations	☐	Allows user permission to rename or relocate (drag and drop) an instrument in the Tree.

When finished selecting options for the new user in all three sections of the **New User** screen, click the **Save** button to save the new data.

The information entered and the access privileges selected will be stored in the database.

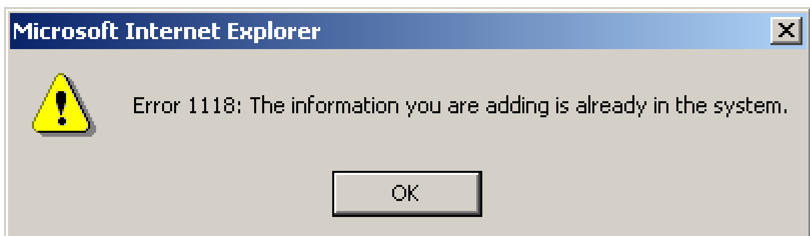
Warning Messages

If a different menu option is selected before saving the User information, the following warning message is displayed:



- Click the **OK** button to cancel the data entered, or
- Click the **Cancel** button to clear the message and return to the **New User** screen to save the data.

If the Employee ID entered already exists in the database in the same Facility, the following warning message is displayed:



- Click the **OK** button to clear the message and edit the Employee ID.

If the ***required*** field(s) for First Name, Last Name, User ID and Employee ID are missing when the New User information is saved, the following warning message is displayed:

- Click the **OK** button to clear the message and enter the required information.

User Search Screen

Administrative: User Setup >> Search

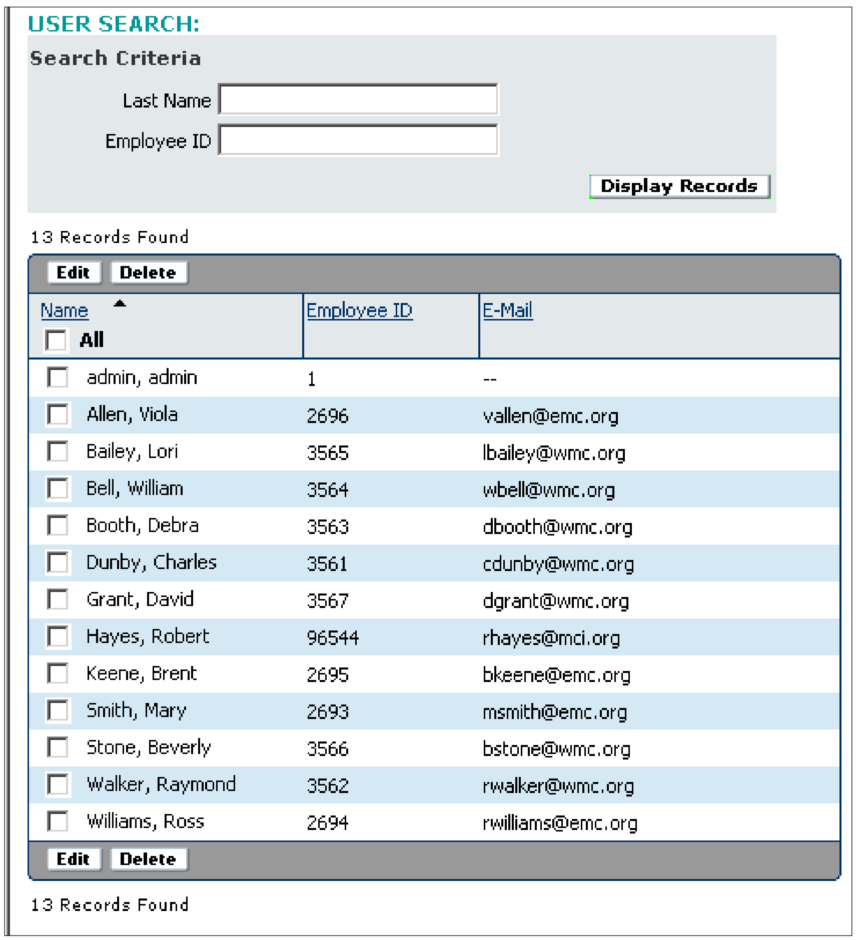
The **User Search** screen allows the user to find, edit and delete users.

To **view** users:

1. Move the mouse cursor over **Administrative** to display menu options.

2. Move the mouse cursor over the **User Setup** option until the submenu appears and click on the **Search** option.

The **User Search** screen displays the Search Criteria entry fields and the User table.



To **search** for a user:

1. Enter a **Last Name** and/or an **Employee ID** and click the **Display Records** button.

2. **Results** that match or are similar to the name and/or ID entered are displayed in the User table.

Edit Users

To **edit** a single user or multiple users:

1. Select one ore more records in the table by click on the box(es) in the Name column.

2. Click the **Edit** action button.

To **edit** all users:

1. Click on the box marked **All** in the Name column header.

2. Click the **Edit** action button.

The **Edit User** screen has the same three sections as the **New User** screen (see Section **New User Setup Screen, above**).

***Note**: All User Identifications fields may be modified with the exception of the User ID field. Permit Access To Locations, Menu Permissions and Function Permissions may also be modified.*

My Profile Screen

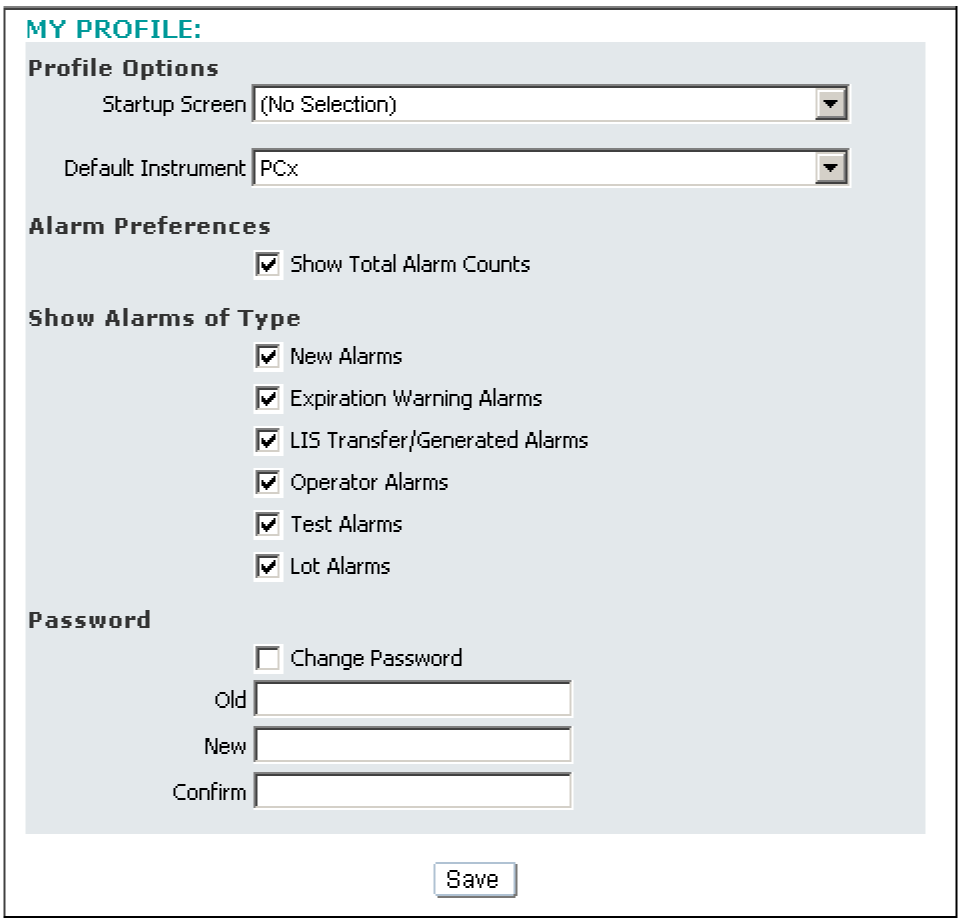
Administrative: My Profile

The **My Profile** screen allows you to customize the behavior of the system for your User ID. The My Profile settings are unique to every user. All users regardless of their assigned Menu Permissions have access to the My Profile screen.

To select **My Profile** options:

1. Move the mouse cursor over **Administrative** to display the menu options.

2. Click on the **My Profile** option.

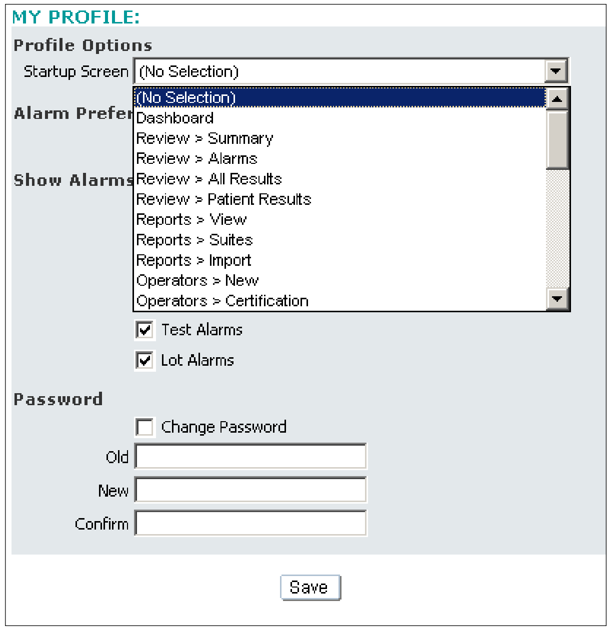


- Your location in the **Tree** is irrelevant as users are not associated with a certain facility, department or location.

- The **My Profile** screen displays the Profile Options available to customize the system.

Select a Startup Screen

Select your choice of a Startup Screen from the dropdown list under the **Profile Options** header. Only menu options assigned to you will appear as an option in the Startup Screen dropdown list.



The system will display the selected Startup Screen each time you log on.

Default Instrument

Select a default instrument from the dropdown list. The default instrument will display in all instrument fields on all screens.

Alarm Preferences

- Click on the checkbox to **enable** the **Show Total Alarm Counts** option. The Total Alarm Count will appear in the top right corner of every screen (except for the log on screen).
- An unchecked box means the **Show Total Alarm Counts** option is disabled.

Show Alarms of Type

Click on the checkbox(es) to select the warning alarm types the system will display on the Dashboard. These selections will recalculate the total alarm counts based on which alarms are selected. Disabling an Alarm Type means that the associated alarms will not be displayed on the Dashboard, however, alarms will be generated as applicable. Turning on Alarm Type category at a later date will display associated alarms on the Dashboard along with all unacknowledged alarms.

- ☐ New Alarms
- ☐ Expiration Warning Alarms
- ☐ LIS Transfer/Generated Alarms
- ☐ Operator Alarms
- ☐ Test Alarms
- ☐ Lot Alarms

The following lists each My Profile Alarm Type category and the corresponding Alarms and Dashboard category:

Alarm Type	**Alarm Description**	**Dashboard Category**
New	Instrument Moved	Notifications
New	New Reagent Lot	Notifications
New	New Control Lot	Notifications
New	New Linearity Lot	Notifications
New	New Proficiency Lot	Notifications
New	New Instrument	Notifications
New	New Operator	Operator
Expiration Warning	Reagent Exp. Warning	Notifications
Expiration Warning	Control Exp. Warning	Notifications
Expiration Warning	Linearity Exp. Warning	Notifications
Expiration Warning	Operator Exp. Warning	Operator
LIS Transfer/Generated	Out-of-Range Result - LIS	LIS/Test Alarms
LIS Transfer/Generated	Invalid Operator - LIS	LIS/Test Alarms
LIS Transfer/Generated	Invalid Patient - LIS	LIS/Test Alarms
LIS Transfer/Generated	Test Rejected - LIS	LIS/Test Alarms
LIS Transfer/Generated	Scripting Error	LIS/Test Alarms
LIS Transfer/Generated	Result Edit Not Forwarded	LIS/Test Alarms
LIS Transfer/Generated	Custom LIS Alarm 1-10	LIS/Test Alarms
LIS Transfer/Generated	Repeat Test	LIS/Test Alarms
Operator	Invalid Operator - Inst	Notifications
Operator	Expired Op. Certification	Operator
Test	Invalid QC - Inst	LIS/Test Alarms

Alarm Type	Alarm Description	Dashboard Category
Test	Test Error	Notifications
Test	Out-of-Range QC	LIS/Test Alarms
Test	Out-of-Range Result	LIS/Test Alarms
Test	Patient ID Not Confirmed - Inst	LIS/Test Alarms
Lot	Expired Reagent Lot	Notifications
Lot	Expired Control Lot	Notifications
Lot	Expired Linearity Lot	Notifications
Lot	Invalid Reagent - Inst	Notifications
n/a	Rejected Result Alert	Notifications
n/a	Not Connected	Instrument Summary
n/a	Upload Required	Instrument Summary
n/a	Upload Location Warning	Instrument Summary

> ***Note**: These alarms will still show in the Alarms and Dashboard screens even if the **Show Total Alarm Counts** option is disabled.*

Password

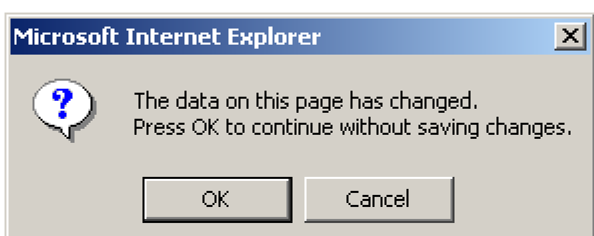
- Click on the checkbox to change the current password.

[add box]	Change Password.
Old	Enter current password.
New	Enter a new password.
Confirm	Enter new password again to confirm.

- Click the **Save** button to save the data.

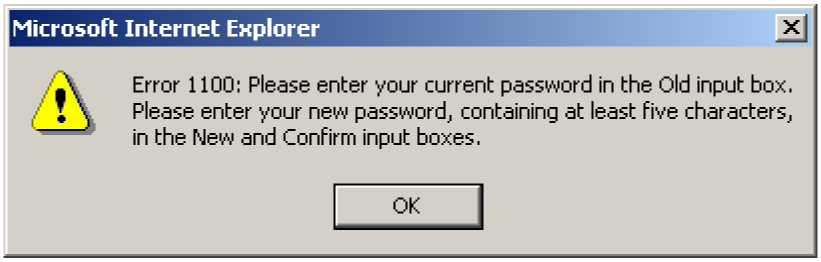
Warning Messages

If a different menu option is selected before saving the selected options, the following warning message is displayed:



- Click the **OK** button to cancel the data entered, or
- Click the **Cancel** button to clear the message and return to the My Profile screen to save the data.

If the Confirm password entered does not match the new password entered or the password does not have between five and 30 characters, the following error message is displayed:



- Click the **OK** button to clear the message and re-enter the password.

Database Screens

Database Import

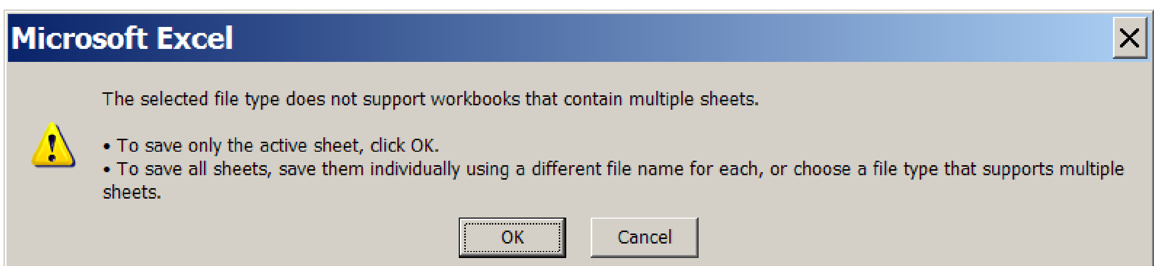
Administrative: Database >> Import

Operator data files must be imported in Comma delimited (.csv) format.

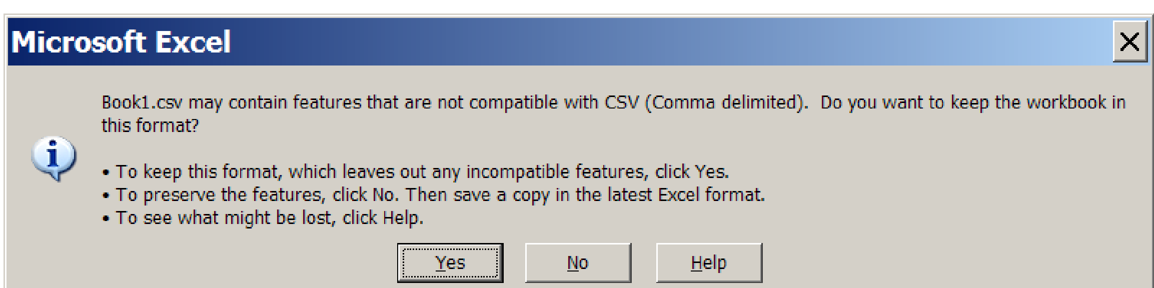
- If Operators will be assigned to different Locations the Location specific Operator data must be saved in separate files, one .csv file per Operator Location.
- Valid instrument types are Abbott glucose monitors and the i-STAT analyzer.

To **save** the data from an Excel spreadsheet in Comma delimited (.csv) format:

1. Open the Excel file with the operator data.
2. Click the arrow in the **Save as type:** entry field to display the dropdown list.
3. Click on the **CSV (Comma delimited) (*.csv)** file type from the dropdown list.
4. The **File name:** entry field will display your file name with the extension .csv.
5. The following message will appear:



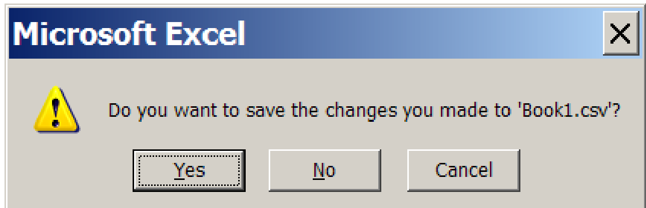
6. Click **OK.**
7. The following message will appear:



8. Click **Yes**.

9. Select **File**, **Save** from the menu to save the changes. You will be prompted with the same messages boxes, click **OK** and then **Yes**.

10. Select File, Exit from the menu (or click X in the top right corner) to close the file. You will be prompted with the following message;



11. Select No. The file will close, but the changes have been saved.

12. Right click on the saved .csv file, select Open With from the menu and then Notepad from the program list. The file will open in Notepad.

13. Hit the Enter key once on your keyboard to create an empty line just above the operator data.

14. Enter the instrument type certification (i.e. PCx) in the empty space, just above the operator data.

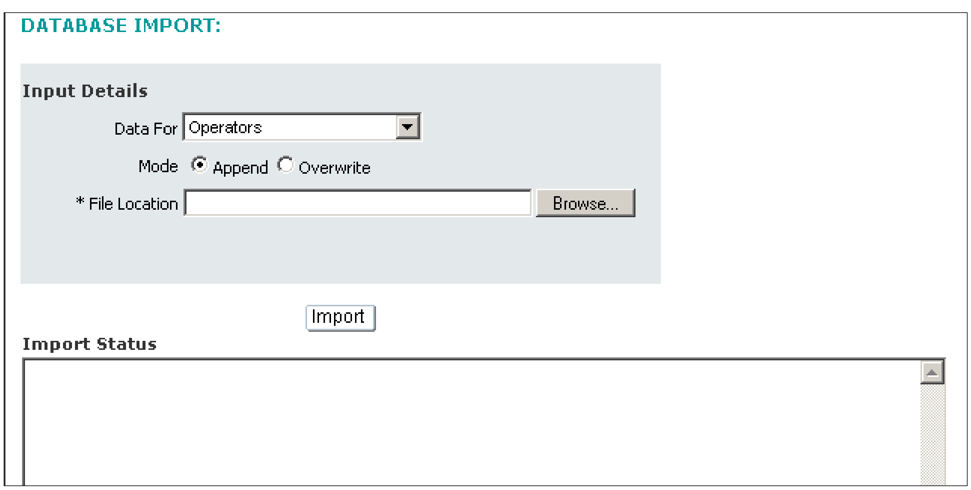
15. Select File, Save from the menu and close the file.

To **import** data to the system:

1. Move the mouse cursor over **Administrative** to display the menu options.

2. Move the mouse cursor over the **Database** option until the submenu appears.

3. Click on the **Import** option to display the **Database Import** screen.



To **import** information into the database:

1. Select the **Append** Mode to **add** the imported information to the existing data, or

2. Select the **Overwrite** Mode to **overwrite** the existing data for operators with the imported information.

3. Select the **File Location** of the operator .csv file by clicking on the **Browse** button.

A new browser window appears with a file system browser for the PC running software. Depending on your location's network, it may display only files on the local PC or files available on network drives.

4. Locate and select the file to import and click the **Open** button on the browser window.

5. The entry field on the **Database Import** screen displays the file name selected in the **File Location** entry field.

6. Click the **Import** button to begin the import of data.

If import is successful a message will display in the Import Status window indicating the number of records imported successfully and/or the number of records rejected and the reason for the error. If any records are rejected correct the error in the .csv file and attempt the import again.

Import Status

```
Thu Nov 2 16:20:35 EST 2006: Importing 'H:\My Documents\POC
Training\Product Training\QC Manager 3.x\Operator Export_Import\Operator
Lists\operator list.csv'.
Operator List Import in progress...

3 record(s) imported successfully.

2 record(s) rejected due to errors (error list truncated at 100):
 -- Invalid Certification date specified.  [OperatorId =]
 -- Invalid Expiration date specified.  [OperatorId =]
 -- The required Operator ID field is missing.  [OperatorId =]
 -- Invalid Certification date specified.  [OperatorId =]
 -- Invalid Expiration date specified.  [OperatorId =]
 -- The required Operator ID field is missing.  [OperatorId =]

Thu Nov 2 16:20:38 EST 2006: Import Complete.
```

Importing Data from an Excel Spreadsheet

To **import** data from an Excel spreadsheet:

Create a table of operators using an Excel spreadsheet:

When creating the spreadsheet for operators the first row must remain blank.

Columns A through I must be populated as follows;

Operator Import List

Row 1	Leave blank
Column A	Operator ID - ***required***
Column B	Last Name - optional
Column C	First Name - optional
Column D	Certification Date - ***required***
Column E	Expiration Date - ***required***
Column F	Certification Interval - ***required***
Column G	0 (the number zero) - ***required***
Column H	1 (the number one) - ***required***
Column I	Original Certification Date - ***required***

Valid entries for Certification Interval are:
3 (3 months), 6 (6 months), 12 (12 months), 0 (Never Expire), -1 (Specify), -2 (Expired).

Date entered in columns D, E and I must be formatted with the four digit year (see example spread sheet below)

Note*: Field I (Original Certification Date) is a required field, however, Original Certification Date information will not be populated as part of the operator certification record.*
Original Certification Date must be updated manually via the Operator Certification screen.

	A	B	C	D	E	F	G	H	I
1									
2	1000	Smith	Elizabeth	7/1/2006	7/1/2007	12	0	1	3/16/2001
3	1001	Taylor	Ann	7/1/2006	7/1/2007	12	0	1	3/16/2001
4	1002	Jones	Mary	7/1/2006	7/1/2007	12	0	1	7/1/2006
5	1003	Miller	Kathleen	7/1/2006	7/1/2007	12	0	1	6/15/2004
6	1004	Flaherty	Margaret	7/1/2006	7/1/2007	12	0	1	6/22/2002
7	1005	Martin	Jennifer	7/1/2006	7/1/2007	12	0	1	6/24/2001
8	1006	Hurt	Sally	7/1/2006	7/1/2007	12	0	1	6/11/2005
9	1007	Price	Stacey	7/1/2006	7/1/2007	12	0	1	3/16/2001
10	1008	Harris	Esther	7/1/2006	7/1/2007	12	0	1	6/8/1999
11	1009	Jordon	Irene	7/1/2006	7/1/2007	12	0	1	8/18/2002
12	1010	Horton	Barbra	7/1/2006	7/1/2007	12	0	1	5/12/2001
13	1011	Mills	Kathryn	7/1/2006	7/1/2007	12	0	1	6/1/2004

Database System Status

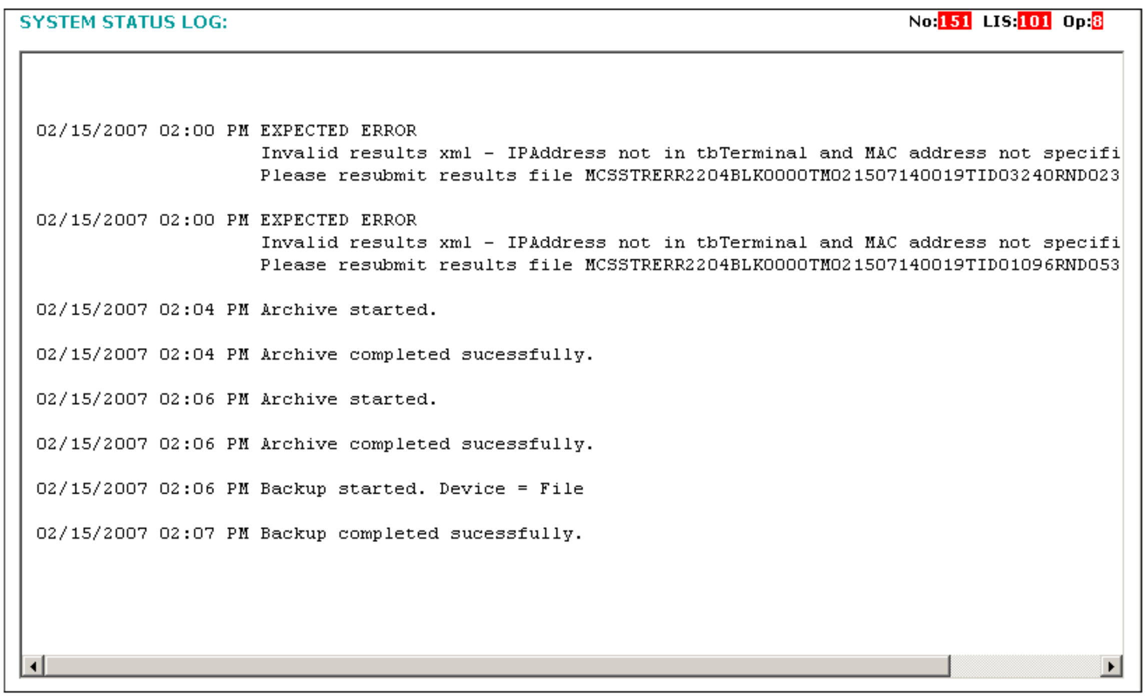
Administrative: Database > System Status

The **System Status Log** screen displays information on QCM managed system backup, restore and archive functions as well as any problem status recorded in the past 30 days.. *Backup activity managed via SQL Server is not noted in the System Status Log.*

- Displays system backup, restore and archive functions
  i.e. 07/25/2006 08:45 Backup started. Device = Tape

- Records communication interruption with instrument
  i.e. 08/29/2006 22:01 PCx Component Meter stopped responding - Please check the meter's battery: M07610053

- Reports other system issues as they occur
  i.e. 09/08/2006 10:13 QCM Service Control Service Control found QCM Communication Service not running – 9/8/2002 10:13:25.968



Panels Screen

Administrative>>Panels

The **Panels** screen allows you to add, edit and delete instrument test panel information for multi analyte instruments. Creating a test panel allows the user to view multiple analytes in a summary format via the Review Patient Results screen.

The test panels added will be listed in the Panel Name dropdown list in the Patient Results screen. The test panels are accessible to the entire organization (Facilities, Departments, and Locations).

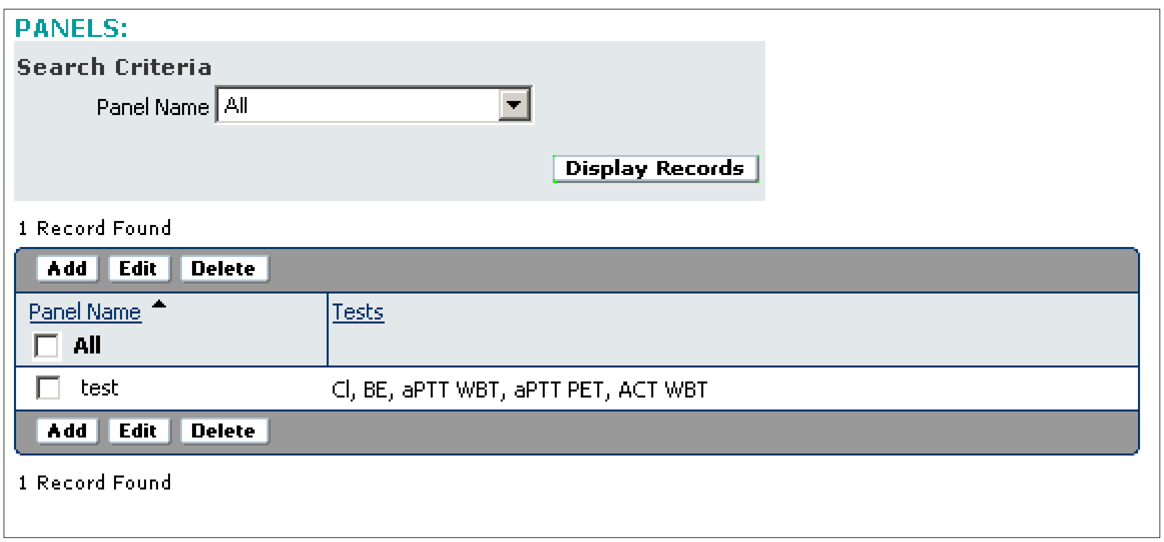
To **view** test panels:

1. Move the mouse cursor over **Administrative** to display the menu options.

2. Click on the **Panels** option.

3. In the **Search Criteria** section of the screen use the **Panel Name** filter option to display all panel names or a specific panel from the dropdown list.

4. Click the **Display Records** button to display records that fit the chosen filter option.



Add a Test Panel

To **add** a test panel:

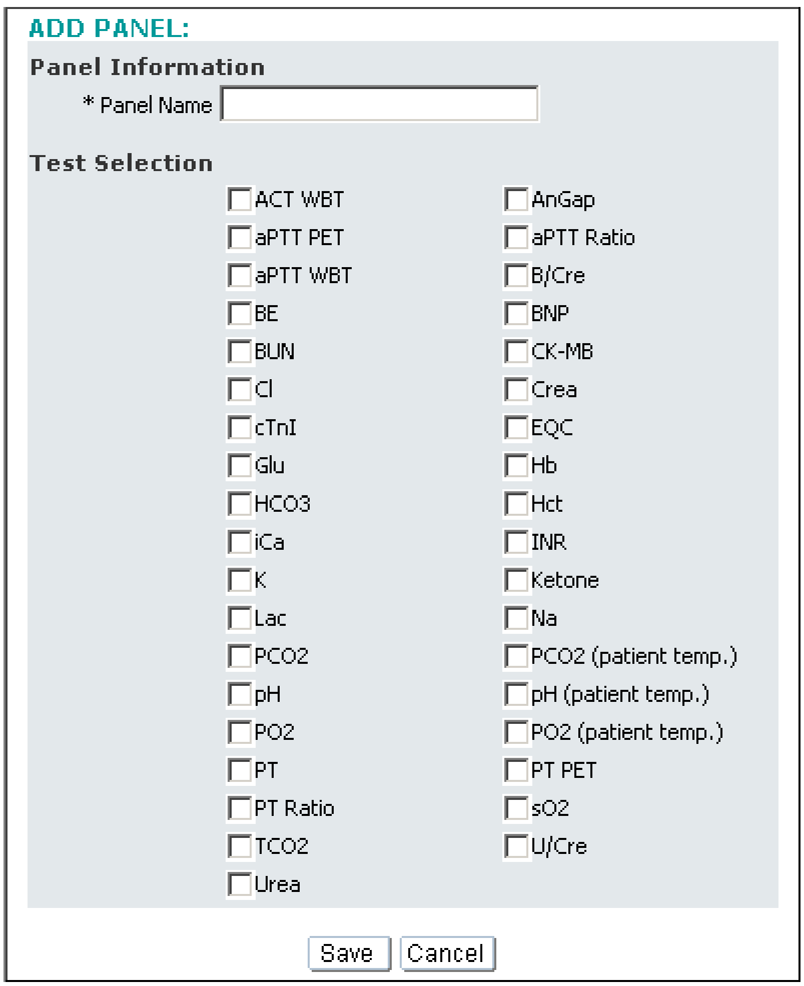
1. Click the **Add** action button.

   - The **Add Panel** screen displays the entry field for the test panel name and the test selection options.

* Panel Name is a ***required*** entry field.

2. Select tests by checking the appropriate boxes.

3. Click the **Save** button to save the data. The information entered will be stored in the database. The saved panel will be available in the **Panel** dropdown list in the **Patient Results** screen.



The **Panels** screen appears with the new test panel displayed in the **Test Panel** table.

4. Click the **Cancel** button to cancel the Add action.

Edit a Test Panel

To **edit** a single test panel or multiple test panels:

1. Click the box(es) in the Panel Name column.

2. Click the **Edit** action button.

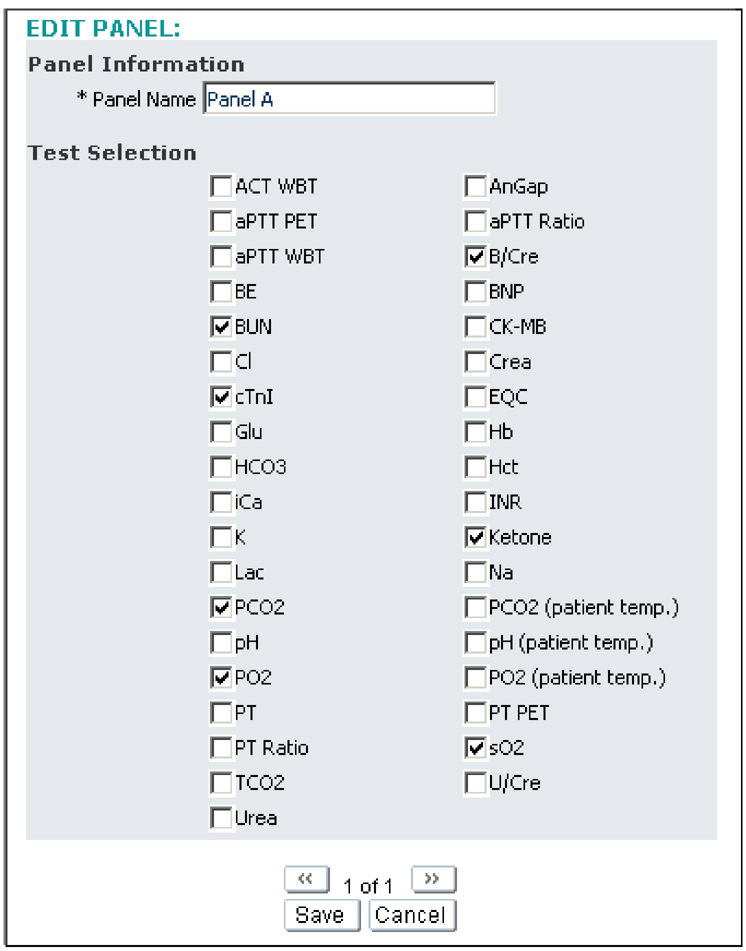
To **edit** all test panels:

1. Click the box marked **All** in the Panel Name column header.

2. Click the **Edit** action button.

The **Edit Panel** screen appears with the information stored in the database for the first selected test panel record.

If multiple test panel records are selected each record is displayed on a separate page. Use the previous and next buttons to change pages.



* Panel Name is a ***required*** entry field.

3. Click the **Save** button to save the edited data, or Click the **Cancel** button to cancel the edit action without saving.

Delete a Test Panel

To **delete** a single test panel or multiple test panels:

1. Click the box(es) in the Panel Name column.

2. Click the **Delete** action button.

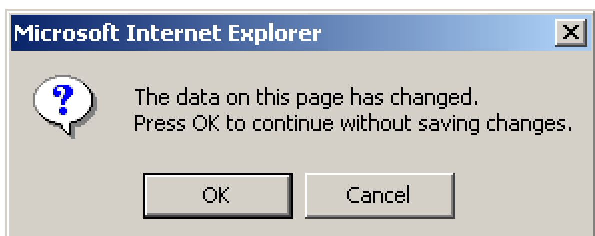
To **delete** all test panels:

1. Click the box marked **All** in the Panel Name column header.

2. Click the **Delete** action button.

Warning Messages

If a different menu option is selected before saving new or edited panel information, the following warning message is displayed:



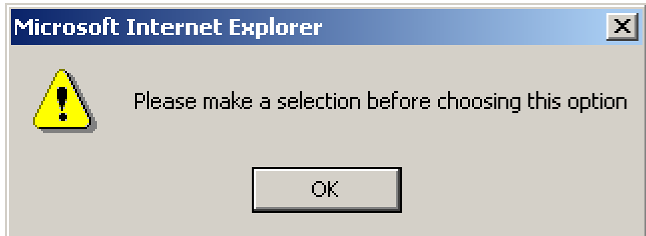
- Click the **OK** button to cancel the data entered.

- Click the **Cancel** button to clear the message and return to the **Panels** screen to save the data.

If a ***required*** field (Panel Name) is missing when test panel information is saved, the following warning message is displayed:

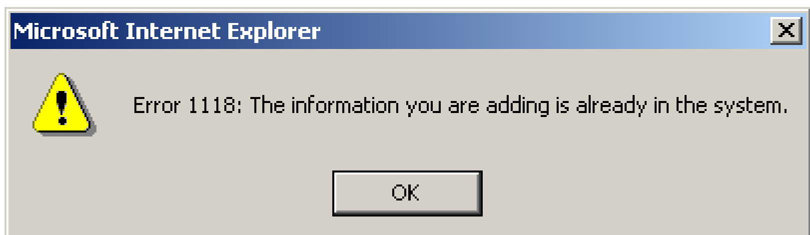
- Click the **OK** button to clear the message.

If records are not selected from the table before clicking on the **Edit** or **Delete** action button, the following warning message is displayed:



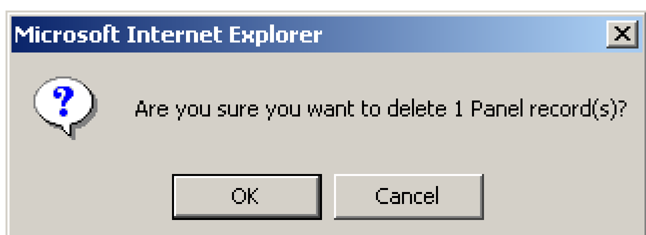
- Click the **OK** button to clear the message and make a selection.
- Click the **OK** button to clear the message and enter the required information.

If the Panel Name entered already exists in the database, the following warning message is displayed:



- Click the **OK** button and choose a different Panel name.

If a test panel is selected for deletion, the following warning message is displayed:



- Click the **OK** button to delete the panels.
- Click the **Cancel** button to cancel the delete action.

10.Technical Support Information

Contacting Abbott Service

Abbott is committed to helping you resolve any problems with the PrecisionWeb Point of Care Data Management System. For assistance, please call Abbott Technical Support at 1-877-529-7185, twenty-four (24) hours per day. Outside the United States and Canada, contact your local office or distributor listed below.

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