



StockTaker Web Scheduler User Guide

Version 2.5.0

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StockTaker Web

StockTaker Scheduler



View Stock Take Schedules



Manage Stock Take Schedules



Manage Scheduler Users



Manage Facilities



Manage Inventory Locations

StockReceiver



View Delivery Details



Manage StockReceiver Users

StockTaker Version 2.5.0



STOCKTAKER SCHEDULER

VIEWING STOCK TAKE SCHEDULERS

- To view a stock take schedule, click the **View Stock Take Schedules** button on the main page.
- Note that a default administrator login account is created when StockTaker Scheduler is installed. Speak to your system administrator if you need the user name and password for this account.

View Stock Take Schedules

Help Done

Select Schedules

Select A Health Facility: Lincoln Health Facility

Select a Day of the Week: Tuesday

Select a Description: URD Unit 10

Stock Lists Scheduled:

URD10 - URD Unit 10

OR Inventory
Emergency
Operating Room
OR Tues
Cath Unit 10
URD Unit 10

Print View

- The **View Stock Take Schedules** page will then be displayed. Select the health facility and day of the week for which you want to view a stock take schedule. The **Select a Description** drop down list will then be populated with the available schedules.
- Select the description of the schedule you would like to view from this drop down list.
- Stock Lists associated with that schedule will now be displayed.
- Click the **Done** button to exit the **View Stock Take Schedules** page.
- **Note:** "No schedules exist" will be displayed in the description drop down list if no schedules are available for the given health facility and week day.

Printing Schedules

- Click the **Print View** button on the **View Stock Take Schedules** page to display a printable version of the schedule.

Stock Take Schedule

Schedule Generated on: 15/12/2005

Health Facility: OGC Health Campus

Schedule Day: Tuesday

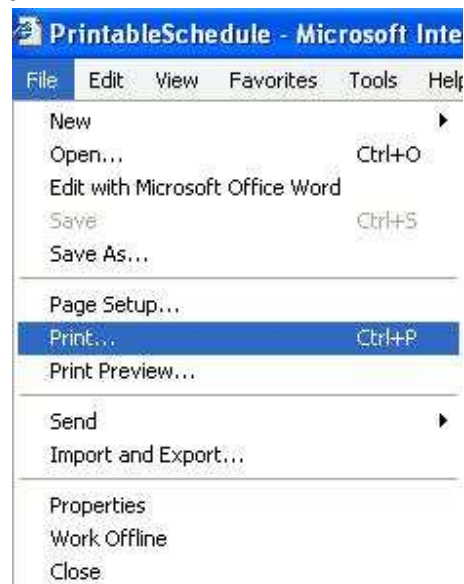
Schedule Description: Tues Schedule 1

Mnemonics of Carts Scheduled for Stock Take:

OGCLAB001 - Lab 1

Close

Use the Print feature of your web browser to print the schedule. In Internet Explorer the option to print is found under the File menu.



- Click the **Close** button to return to the **View Stock Take Schedules** page.

MANAGING STOCK TAKE SCHEDULES

- To manage stock take schedules, click the **Manage Stock Take Schedules** button on the main page. You will need to login to manage schedules.
- Enter your Scheduler username and password and click the **Login** button. Contact your system administrator if you require a username and password.

Login

Enter Login Credentials

User name:

Password:

- The **Manage Stock Take Schedules** page will be displayed after successfully logging in.

Manage Stock Take Schedules

Help Done

Management Options

Manage Schedules Manage Health Facilities Manage Stock Lists

Add Schedule Form

Add Schedule Form Edit Schedule Form Delete Schedule Form

Health Facility Select a Health Facility Day Select a Week Day

Unscheduled Stock Lists Scheduled Stock Lists New Description

Enter description

Add >> Remove <<

Save Cancel

Adding Schedules

- Click on the **Add Schedule Form** button to add a new stock take schedule.
-
- Select the health facility and day of the week for the new schedule. A list of the unscheduled stock lists will be displayed in the **Unscheduled Stock Lists** list.
- Adding stock lists to the schedule:
 - Select the stock lists from the **Unscheduled Stock Lists** list that you want to add to the schedule and click the “>>” button. To select more than one stock list at a time, hold down the **Shift** key while selecting the stock lists.
- Removing stock lists from the schedule:
 - Select stock lists from the **Scheduled Stock Lists** list that you want to remove from the schedule and click the “<<” button.
- Enter a description for the new schedule into the **New Description** field.
- Click the **Save** button to save the new schedule.
- Click the **Cancel** button to clear the form.
- Click the **Done** button at the top right of the page when finished.

Manage Stock Take Schedules

Help Done

Management Options

Manage Schedules Manage Health Facilities Manage Stock Lists

Edit Schedule Form

Add Schedule Form Edit Schedule Form Delete Schedule Form

Health Facility Lincoln Health Facility Day Monday

Unscheduled Stock Lists

OR1
ERSTORES
OR01
CATH01
URD10

Add >>

Remove <<

Scheduled Stock Lists

ORSTORES

New Description

OR Stores Monday

Description

OR Stores Monday

Save Cancel

Edit Schedules

- Click on the **Edit Schedule Form** button to edit an existing stock take schedule.
- Select the health facility and day of the week of the schedule to be edited. The **Description** drop down list will then be populated with descriptions of available schedules. If no schedules are available, the description will read "No schedules exist".
- Select the description of the schedule you want to edit. The **Scheduled Stock Lists** and **Unscheduled Stock Lists** will be populated with the stock lists that are included in the selected schedule and are available for scheduling respectively.
- Adding stock lists to the schedule:
 - Select the stock lists from the **Unscheduled Stock Lists** list that you want to add to the schedule and click the ">>" button. To select more than one stock list at a time, hold down the **Shift** key while selecting the stock lists.
- Removing stock lists from the schedule:
 - Select stock lists from the **Scheduled Stock Lists** list that you want to remove from the schedule and click the "<<" button.

- Updating the description:
 - You can update the schedule description by typing a new description into the **New Description** field.
- Click the **Save** button to save the updated schedule.
- Click the **Cancel** button to cancel any changes made to the schedule and clear the form.
- Click the **Done** button at the top right of the page when finished.

Manage Stock Take Schedules

Help Done

Management Options

Manage Schedules Manage Health Facilities Manage Stock Lists

Delete Schedule Form

Add Schedule Form Edit Schedule Form Delete Schedule Form

Health Facility Lincoln Health Facility
Select a Health Facility
American General Hospital
Lincoln Health Facility
Memorial Hospital

Day Select a Week Day

Scheduled Stock Lists

Description

Cancel Delete

Deleting Schedules

- Click on the **Delete Schedule Form** button to view the Delete Form.
- Select the health facility and day of the week of the schedule to be deleted. The **Description** drop down list will then be populated with descriptions of available schedules. The description will read "No schedules exist" if not schedules are available.
- Select the description of the schedule you want to delete. The **Scheduled Stock Lists** list will be populated with the stock lists that are included in the selected schedule.
- Click the **Delete** button in the lower left corner to delete the schedule.
- Click the **Cancel** button to clear the form.
- Click the **Done** button at the top right of the page when finished.

MANAGING HEALTH FACILITY

- To manage health facility information, click the **Manage Stock Take Schedules** button on the main page. You will need to login to manage health facility information.
- Enter your Scheduler username and password and click the **Login** button. Contact your system administrator if you require a username and password. Refer to the Managing Stock Take Schedules section of this document for a picture of the login page.
- After logging in, you will be taken to the **Manage Stock Take Schedules** page.
- Clicking the **Manage Health Facilities** button at the top of the page will take you to the **Manage Health Facility** page.

Manage Health Facilities

[Help](#) [Done](#)

Management Options

[Manage Schedules](#) [Manage Health Facilities](#) [Manage Stock Lists](#)

Facility List

Action	Facility Name
Edit	American General Hospital
Edit	Lincoln Health Facility
Edit	Memorial Hospital

Add Facility Form

[Add Facility Form](#) [Edit Facility Form](#) [Delete Facility Form](#)

Health Facility ID: (7 characters max):

Health Facility Description: (50 characters max)

Meditech Input Folder Path:

Meditech Output Folder Path:

StockReceiver NPR Path (optional):

[Save](#) [Cancel](#)

Adding a Health Facility

- Click on the **Add Facility Form** button to add a new health facility.
- Enter the ID and description of the new facility along with the paths to the MEDITECH input and output folders (network shares) associated with this health facility. Contact your system administrator if you do not know the UNC paths for the input and output folders.
- If StockReceiver is being used, use the **StockReceiver NPR Path** text box to enter the path where purchase orders NPR's will be placed after they are extracted from MEDITECH.
- Click the **Save** button to save the new health facility details.
- Click the **Cancel** button to clear the form.
- Click the **Done** button at the top right of the page when finished.

Manage Health Facilities

Help Done

Management Options

Manage Schedules Manage Health Facilities Manage Stock Lists

Facility List

Action	Facility Name
Edit	American General Hospital
Edit	Lincoln Health Facility
Edit	Memorial Hospital

Edit Form

Add Facility Form Edit Facility Form Delete Facility Form

Please Select a Health Facility: Lincoln Health Facility Go

Health Facility ID: (7 characters max):
LHS Required

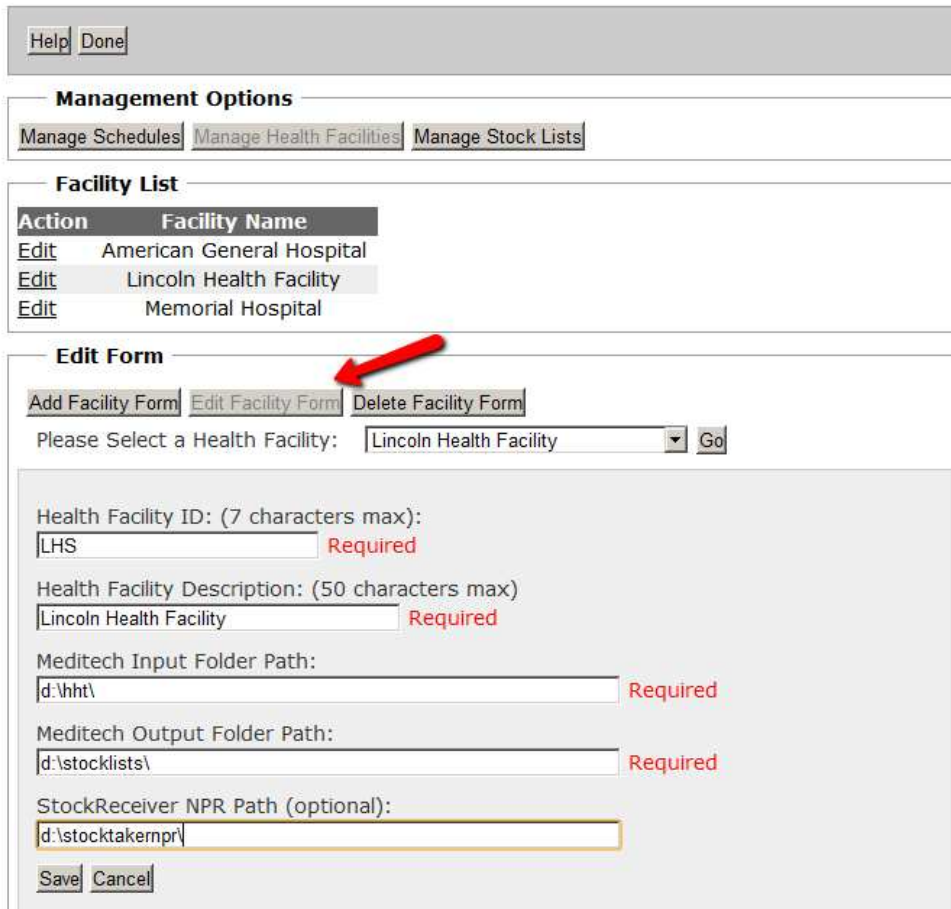
Health Facility Description: (50 characters max)
Lincoln Health Facility Required

Meditech Input Folder Path:
d:\hht\ Required

Meditech Output Folder Path:
d:\stocklists\ Required

StockReceiver NPR Path (optional):
d:\stocktakempri

Save Cancel



Edit a Health Facility

- Click on the **Edit Facility Form** button to edit an existing health facility.
- Select the ID of the health facility to be edited from the **Select a Health Facility** drop down list. The details of the facility will then be displayed.
- Update the ID, description, MEDITECH Input Folder Path and Output Folder Path (network shares) fields as required.
- If StockReceiver is being used, use the **StockReceiver NPR Path** text box to update the path for the purchase orders as required.
- Click the **Save** button to save the updates.
- Click the **Cancel** button to cancel any changes made to the health facility.
- Click the **Done** button at the top right of the page when finished.

Delete Form

[Add Facility Form](#) [Edit Facility Form](#) [Delete Facility Form](#)

Please Select a Health Facility:

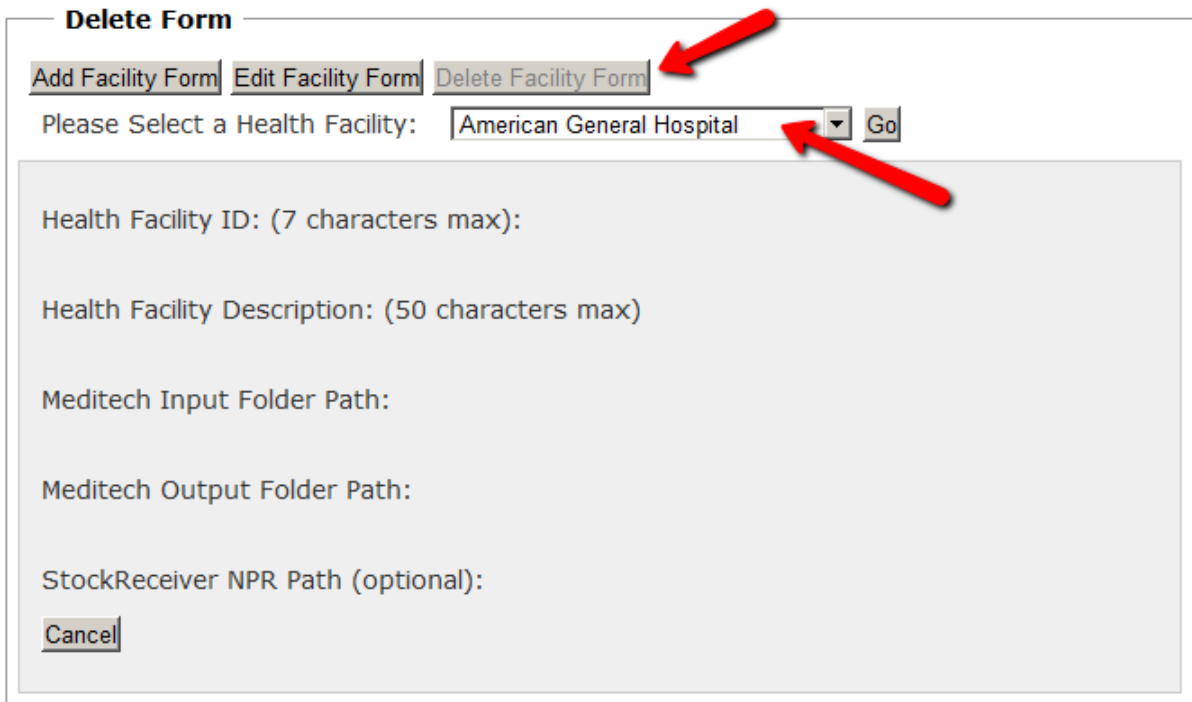
Health Facility ID: (7 characters max):

Health Facility Description: (50 characters max)

Meditech Input Folder Path:

Meditech Output Folder Path:

StockReceiver NPR Path (optional):



Deleting a Health Facility

- Click on the **Delete Facility Form** button to view the Delete Form.
- Select the ID of the health facility to be deleted from the **Select a Health Facility** drop down list. The details of the facility will then be displayed.
- Click the **Delete** button in the lower left corner to delete the health facility.
- Click the **Cancel** button to clear the form.
- Click the **Done** button at the top right of the page when finished.

MANAGING STOCK LIST

- To manage stock list details, click the **Manage Stock Take Schedules** button on the main page. You will need to login to manage stock list information.
- Enter your Scheduler username and password and click the **Login** button. Contact your system administrator if you require a username and password. Refer to the Managing Stock Take Schedules section of this document for an image of the login page.
- After logging in, you will be taken to the **Manage Stock Take Schedules** page.
- Clicking the **Manage Stock Lists** button at the top of the page will take you to the **Manage Stock List** page.

Manage Stock Lists

The screenshot shows a web interface for managing stock lists. At the top, there are buttons for 'Help' and 'Done'. Below this is a 'Management Options' section with three buttons: 'Manage Schedules', 'Manage Health Facilities', and 'Manage Stock Lists'. The 'Manage Stock Lists' button is highlighted. Underneath is an 'Add Form' section with three buttons: 'Add Stock List Form', 'Edit Stock List Form', and 'Delete Stock List Form'. A red arrow points to the 'Add Stock List Form' button. Below the buttons is a form with the following fields: 'Stock List ID (10 characters max):' with a text input field, 'Stock List Description (50 characters max):' with a text input field, and 'Health Facility:' with a dropdown menu showing 'American General Hospital'. At the bottom of the form are 'Save' and 'Cancel' buttons.

Adding New Stock Lists

- Click on the **Add Stock List Form** button to add new stock list details.
- Enter the ID and description of the new stock list and select the health facility the stock list belongs to from the **Health Facility** drop down list.

NOTE: Stock List IDs are not case sensitive in StockTaker. For example, GBSLAB001 is considered to be the same as GBSLab001.

- Click the **Save** button to save the new stock list.
- Click the **Cancel** button to clear the form.
- Click the **Done** button at the top right of the page when finished.

Manage Stock Lists

Help Done

Management Options

Manage Schedules Manage Health Facilities Manage Stock Lists

Edit Form

Add Stock List Form Edit Stock List Form Delete Stock List Form

Please Select a Stock List: ERSTORES ▼

Stock List ID (10 characters max):
ERSTORES

Stock List Description (50 characters max):
Emergency Department

Health Facility:
Lincoln Health Facility ▼


Save Cancel

Edit Stock List Details

- Click on the **Edit Stock List Form** button to edit the details of an existing stock list.
- Select the ID of the stock list to be edited from the **Select a Stock List** drop down list. The details of the stock list will then be displayed.
- Update the ID, description, and health facility fields as required.
- Click the **Save** button to save the updates.
- Click the **Cancel** button to cancel any changes made to the stock list details.
- Click the **Done** button at the top right of the page when finished.

Delete Form


[Add Stock List Form](#) [Edit Stock List Form](#) [Delete Stock List Form](#)

Please Select a Stock List: 

Stock List ID (10 characters max):

Stock List Description (50 characters max):

Health Facility:



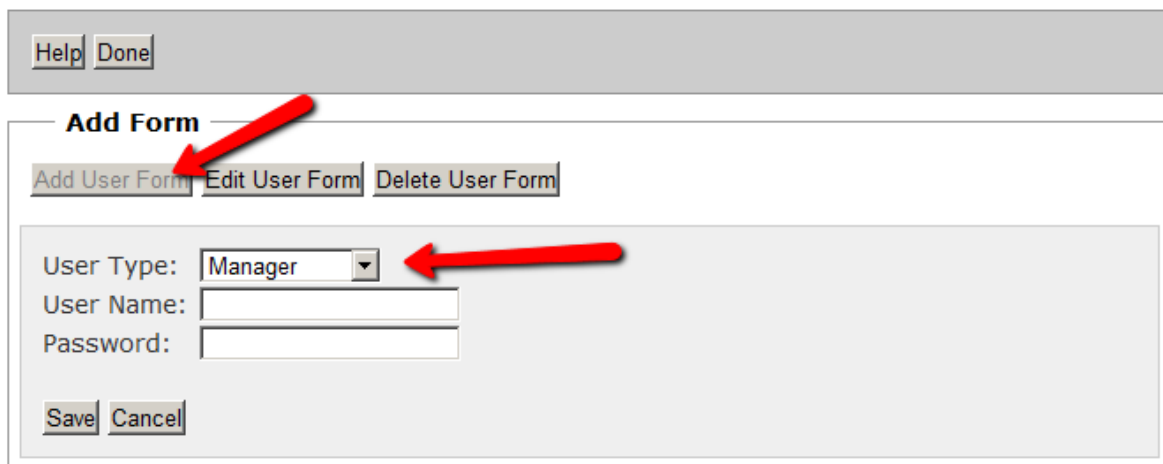
Deleting Stock List Details

- Click on the **Delete Stock List Form** button to view the Delete Form.
- Select the ID of the stock list to be deleted from the **Select a Stock List** drop down list. The details of the stock list will then be displayed.
- Click the **Delete** button in the lower left corner to delete the stock list.
- Click the **Cancel** button to clear the form.
- Click the **Done** button at the top right of the page when finished.

MANAGING SCHEDULER USERS

- To manage user accounts, click the **Manage Scheduler Users** button on the main page. You will need to log in to manage Scheduler users.
- Enter your Scheduler username and password and click the **Login** button. Contact your system administrator if you require a username and password. You must be set up as a Scheduler administrator to manage user accounts.
- After logging in, you will be taken to the **Manage User Accounts** page.

Manage User Accounts



Help Done

Add Form

Add User Form Edit User Form Delete User Form

User Type: Manager

User Name:

Password:

Save Cancel

Adding a New User Account

- Click on the **Add User Form** button to add a new user account.
- Enter the username and password of the new user and select the type of account from the **User Type** drop down list.
 - Manager accounts are allowed to manage stock take schedules, health facility and stock list details.
 - Administrator accounts are allowed to manage stock take schedules, health facility details, stock list details and user accounts.
- Click the **Save** button to save the user account.
- Click the **Cancel** button to clear the form.
- Click the **Done** button at the top right of the page when finished.

Manage User Accounts

Help Done

Edit Users Form

Add User Form Edit User Form Delete User Form

Please Select a User admin

User Type: Administrator

User Name: admin

Password: Change Password

Save Cancel

Edit a User Account

- Click on the **Edit User Form** button to edit an existing user account.
- Select the username of the account to be edited from the **Select a User** drop down list. The user's username and account type will then be displayed. You will not be able to see the user's password.
- Update the username and account type as required.
- To update the user password, click the **Change Password** button. The password field will then be displayed. Enter the new password into this field.
- Click the **Save** button to save the updates.
- Click the **Cancel** button to cancel any changes made to the user account.
- Click the **Done** button at the top right of the page when finished.

Manage User Accounts

Help Done

Delete Users Form

Add User Form Edit User Form **Delete User Form**

Please Select a User JohnSmith

User Type: Manager

User Name: JohnSmith

Password:

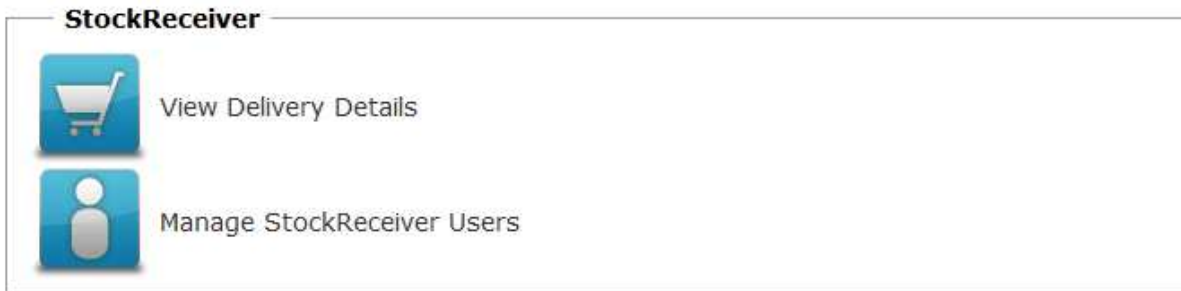
Delete User Cancel

Deleting a User Account

- Click on the **Delete User Form** button to view the Delete Form.
- Select the username of the account to be deleted from the **Select a User** drop down list. The username and account type will then be displayed.
- Click the **Delete** button to delete the user account.
- Click the **Cancel** button to clear the form.
- Click the **Done** button at the top right of the page when finished.

STOCKRECEIVER

StockReceiver Web provides you with the ability to view details of delivered purchase orders as well as manage users of the StockReceiver handheld application.



Viewing Purchase Order Deliveries


- Click the **View Delivery Details** button on the main screen.

Purchase Order Deliveries

[Help](#) [Done](#)

Filter By:

Department:


Start Date: 

End Date:

[Clear Date](#)

Select a PO:

P.O. Details	PO #	Date	Accepted	Delivered By
View Details	0000108	Feb 01, 2010	True	John Smith
View Details	0000196	Apr 19, 2010	True	John Smith
View Details	0000213	Oct 22, 2009	True	John Smith
View Details	0000219	Apr 19, 2010	True	John Smith
View Details	0000255	Apr 19, 2010	True	John Smith
View Details	0000294	Feb 01, 2010	False	John Smith
View Details	0000307	Feb 01, 2010	True	John Smith
View Details	0000373	Jan 31, 2010	True	John Smith

- When the Purchase Order Deliveries page first opens, all the delivered purchase order will be displayed.
 - Use the **Department** drop down list to display only those purchase orders associated with a particular department.
 - Use the **Start Date** and **End Date** fields to display purchase orders within a given time period.
 - To display the calendar, click the Calendar button  beside the **Start Date** and **End Date** Fields.
- Click **View** beside a purchase order to view more details about the delivery.
- Click **Done** to return to the main page.

Delivery Details

[Help](#) [Back](#)

Delivery Details

Department: BAM INFORMATION TECH
Department #: 1.806
Delivery Status: Delivered
Delivery Person: Jimmy Simpson
P.O. #: 141288
Date: Jun 28, 2011

P.O. Details:

Item #	Description	Quantity
000279	SET IV BUTTERFLY 21GX3/4 12	2

Received By:



- The following information is displayed when a purchase order is viewed:
 - **Department:** the name of the department the purchase order was delivered to
 - **Date:** the date the purchase order was sign for
 - **Department #:** the number of the department
 - **P.O. #:** the purchase order number
 - **Delivery Status:** an indication of whether or not the recipient accepted the purchase order. "Delivered" indicates that recipient signed for the order. "Refused indicates, the recipient refused the order. In this case, no signature will be shown.
 - **Delivery Person:** name of the person who delivered the purchase order
 - **P.O. Details:** a list of the items that were on the purchase order.
- Click the **Back** button to return to the Purchase Order Deliveries form.

Managing StockReceiver Users

Manage Delivery Personnel

Help Done

Add New Personnel

First Name:

Last Name:

Add New Cancel

Current Delivery Personnel

	Edit	Delete	First Name	Last Name
	Edit	Delete	John	Smith
	Edit	Delete	Jimmy	Simpson
	Edit	Delete	James	Williams

Adding a User

- Enter a first name and last name into the corresponding text boxes
- Click the **Add New** button
- Click **Cancel** to clear the text boxes

Editing a user

- Click the **Edit** button beside the user you want to edit.
- Update their first and last name as required
- Click **Update** to save the change or **Cancel** to cancel any changes you have made
- Note that any changes you make will be reflected in the delivery information for the purchase orders that the user has delivered.

Deleting a User

- Click the **Delete** button beside the user you want to delete.
- Select **Yes** when prompted to confirm the delete. Selecting **No** will cancel the deletion.
- Note that you cannot delete users who have uploaded delivery information.

- Click **Done** at the top of the page to return to the main page.

Trouble Shooting:

- **The Scheduler application stops responding when adding/editing a Health Facility record:**
This can occur if the machine hosting the Scheduler application cannot access the machine hosting the MEDITECH input and output folders (network shares).
 - Contact your system administrator and have them verify that the MEDITECH input and output folders can be accessed from the machine hosting the Scheduler application.
- **The Scheduler application fails to save a new/edited Health Facility record with the message “UNC path does not exist”:**

This can occur if the Network Service account has been altered.

- Contact your system administrator and have them verify that the Network Service password is set correctly on the machine hosting the Scheduler application and Scheduler Web Services and the machine hosting the StockTaker network shares. More information in regards to this issue can be found in the trouble shooting section of the StockTaker Setup Instructions.