



System Configuration Guide

Anesthesia Manager

PACU Manager

Critical Care Manager

Preop Manager

Picis Perioperative and Critical Care 10.0

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Refer to the *Release Notes* for date of manufacture.



Document may include cautionary statements.



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Unique Device
Identifier (UDI)

For UDI information, refer to the *Release Notes*.

Contents

Introduction	7	Images	63
Overview	7	Setting Global Properties	63
What's New	8	Working with Sections	64
New in Picis 10C	8	Adding, Removing and Ordering Sections	65
Background Concepts	8	Setting Section Properties	65
Customize	11	About Block Types, Section Layouts and Containers	69
Customize Overview	11	Block Types	70
Starting and Quitting Customize	12	Layout Type	71
Working with Customize	12	Fixed Layout	71
The Customize Toolbar	15	Continuous Layout	73
Configuration Sets and Workgroups	17	Containers	75
About Configuration Sets and Workgroups	17	Fixed Containers	75
Creating and Editing Workgroups	21	Auto-fit Containers	76
Creating, Editing and Assigning Configuration Sets	23	Quality Measure Forms	79
Configuration Troubleshooting	29	About Quality Measure Forms	79
Printout Models	31	Managing Quality Measure Form Versions	80
About Printout Models	31	Versioning and Publishing	82
Workflow for Creating and Deploying a Printout Model	33	Editing the Quality Measure Form	84
Opening and closing the Printout Builder	33	Quality Measures Library	84
The Printout Model Selection Window	34	Adding the Measure Block to a Form	85
Versioning and Publishing	37	Measure Block Properties	85
Assigning Models to Configuration Sets	38	Editing Measure Blocks	86
The Printout Builder Window	40	The Measure Block Designer window	86
Ribbons	41	Rule-Based Notifications for Sessions	93
Components	41	Rule Criteria	93
Selected Block Properties	43	Configuration	93
Block/Container Configuration	43	Application Template Configuration	97
Standard properties for blocks	44	About Application Templates	97
Block-specific Properties	47	How eView Uses Templates	98
Printout Management	58	Templates, Sessions and Encounters	98
Creating Library Items	60	Sample Templates	99
Custom Query Blocks	60	Working With Templates	100

Contents

Creating Custom Templates	100
Hiding Templates	103
What You Can Configure	105
Key Template Configuration Parameters	106
Starting and Ending Sessions	106
Preferences for Device Data	108
Shifts and Time Intervals	110
Printouts (template settings)	111
Patient Bar and Notifications Window	112
Required and Recommended Fields	115
Waveforms	116
Devices and Physiologic Variables	119
About Physiologic Variables	119
About Derived Physiologic Variables	119
Configuring Physiologic Variables	120
APACHE II Score	125
Vital Signs Bar	126
Main Chart Features	127
Protocols	127
Events	129
Fluid Balance Window	132
Patient Summary	134
Medication Summary	139
Demographics	139
Flowsheets	145
About Flowsheets	145
Configuration Options for All Flowsheets	146
Creating and Modifying Flowsheets	149
Configure the copying forward of checklist data	154
Other Windows and Accessories	155
Timers	155
Quick Links	156
Ribbon Buttons	161
Workstation Configuration	171
About Workstation Settings	171
Basic Workstation Settings	172
Demographics and Patient Bar Workstation Settings	173
Access to Remote Patients	175
Automatic Log Off	176
Unattended Workstation Display	176
Remote Access Behavior	177
The Advanced Settings Window	177
Messages and Prompts	178
Setting the Color of Certain Features	180
Text Settings	180
Documenting and Viewing Data on Flow-sheets	181
Assessments, Scores, Equipment and QA Indicators	188
Performance Options Related to the Database	190
The Configuration Editor	191
Using The Configuration Editor	191
Log On window	199
Discharge Reasons	200
User Name in Title Bar	201
Change Password Button	201
Clinical Note Export	201
Maximum Patients per Anesthesiologist of Record (Concurrency)	203
Care Metrics	204
CaseCheck	205
Microbiology Results Window Default Sort	205
Configure laboratory data to show	206
Template List	206
External Order Notifications	207
The Default System Template	207
Report Configuration at the Template Level	208
Report Configuration for Preop Manager	208
Patient Summary Export to the HIS	209
Auto-Adjust Fluid Volume Setting for Infusion Pumps	210

Demographics Notification Icon	212	User Groups	264
Event Sets and Macros	212	Clinical Roles	264
Device Communication Failures	214	Attending Types	265
Census Windows	215	Logon Reports	266
Overview	215	Hospital Departments and Patient Loca-	
ADT Administrator	216	tions	267
Creating Queries for the Patient Groups	218	Miscellaneous System Settings	270
Customizing the Patient List	221	Template Encounter Type	270
Customizing Buttons and Other Controls	222	Facilities	271
Testing and Saving Configured Census Win-		Event Mapping	273
dows	223	Audit Trail	273
Button Reference	224	Password Parameters	274
Printout Viewer (workstation settings)	225	Directory Services Authentication	276
Preop Manager Configuration	231	Reports	278
About Preop Manager Configuration	231	Discharge Reasons	280
Preop Evaluation Sections	232	Standard Coding	280
Required Data	234	Privacy Messages	281
Quick Links, Toolbar Buttons and Menu		DB Editor and Clinical Content	283
Commands	236	Clinical Auxiliary Tables	283
Interface Notes	237	Auxiliary Table Usage by Functional Area	287
Miscellaneous Preop Manager Con-		Content for Flowsheets	288
figuration	239	Using DB Editor to Edit Content	288
The Preop Instructions Printout	240	Medication and Fluid Treatments	288
DB Editor	243	Laboratory and Diagnostic Tests	291
DB Editor Overview	243	Laboratory Analyses and Components	292
Starting and Quitting DB Editor	244	Nursing Care, Respiratory and Ventilator	
DB Editor Interface	245	Treatments	295
Auxiliary Database Tables	246	Checklists for Assessments, QA Indicators,	
DB Editor and System Con-		and Equipment	297
figuration	251	Scores	300
Access Rights and Users	251	Schedules for Orders	307
System Rights	251	Standard Orders	311
Prescription/Validation Rights	259	Standard Orders for Combined Medications	313
Program Users	261	Protocols	316
		Physiologic Variables	318
		Derived Variables	318

Contents

Specialized Windows	323
Demographics	323
Common Choices for Diagnoses, Procedures, and Allergies	324
Events and SAM Windows	326
Patient Summary	328
Anesthesiologist Required for Supply Billing	329
Rule-Based Notifications for Sepsis	330
Configuration	330
Preop Manager	330
Overview	330
Medical History Section	332
Physical Examination Section	333
Anesthesia Plan Section	334
Preoperative Instructions Section	334
Record Status Section	335
Signatures Section	335
Addenda Section	335
Risk Assessment Sections	336
Auxiliary Tables Associated with Preop Manager	340
DB Editor and Note Templates	343
About Publishing Note Templates	343
Accessing Notes Manager	343
Publishing a New Note Template	344
Versioning an Existing Note Template	345
Stage 1	345
Stage 2	345
Inactivating a Template	346
Common Choice Lists for Notes	346
Physiologic Variables	347
Laboratory Components	348
Appendix A: Report Templates (RPT files)	349
Creating Report Templates	349
Installing Reports	353
Appendix B: Global Configuration Parameters	355
About Global Configuration Parameters	355
Appendix C: Auxiliary Database Tables	359
List of Auxiliary Database Tables	359
Appendix D: Supported CNL Codes & Laboratory Components for Rule-Based Sepsis Notifications	363
Appendix E: Localization	367
About Localization	367
Template Items to Translate	368
Appendix F: Improving Access to Picis Products	369
Configuring Easy Access to Picis Products	369
Appendix G: Locally-Stored Configuration Settings	371
About Locally-Stored Configuration Settings	371
Appendix H: The Export Tool for Quality Measures	373
Using the Export Tool	375
Index	377

Introduction

Overview

This manual describes the configuration of Proxy Manager, LoadBalancer Manager, Policy Manager and Content Type Manager. In the course of the configuration also other areas of the system interface with applications and the contents of the database to support the provision of individual departments or segments.

This manual primarily describes the following configuration tasks:

- **Database:** The configuration applications of "database" configuration and system-wide tasks.
- **DB Tables:** The configuring tables in the DB database and the maintaining application security in systems that do not integrate with DB Manager.

Note: "DB" is the name that is the database used by Proxy Manager, LoadBalancer Manager, Policy Manager and Content Type Manager.

- **API Administration:** The configuring various web services for the different applications, this program can also be used for API systems such as monitoring and debugging services.

Configuration is typically performed by a system administrator immediately after the system is installed. However, it can also extend to these tasks can modify configuration settings at any time.

If you are upgrading your system from a previous version, please refer to the Technical Upgrade Guide.

The authentication type is selected using installation. After installation, you must create a policy for each user in the code space by installing authentication.

Note: You can change the authentication type at any stage using the configuration tool and the System Installation Guide or the code space. (Source: Department and Patient Information, page 20)

Remote Access Type

The authentication setting determines the type of access users have to remote patients. "Identified" access requires "Identified" access, meaning that no sharing. The configuration is defined by access. Single or 100 remote access means remote sharing and code data are shared. Multiple authentication and the code access may be shared in the first step as an operating unit. Department for sharing data for patients in different operating units.

The configuration authentication is access type (Identified or Non-Identified) using Customer.

Customize Overview

Before you can perform with Customize let into the following general categories:

- Creating "custom models"
- Creating a "custom model" public resource link
- Setting up "configuration set" or "configuration"
- Setting a configuration set. (This concept of setting "apps for resources" from Manager, which are extension settings as well as, defining and configuring custom models for configuration sets.)

Note: If you also use "Custom model" resource content and configurations, the amount of configuration you need to do should be minimal. (Please see the Custom content table for more details.)

Recommendation

A configuration set is a combination of application properties, Proxy Manager settings and extension settings. All settings are stored in the table of tables.

Customers

Starting and Quitting Customers

Application Templates are settings used by **Workforce Manager**, **HRIT Manager** and **Global Case Manager**. It is a basic step to build on the template selected at the start of the session. **Customers** allow you to configure templates to support the needs of individual departments or companies.

Workflows are logical template grouping to which configuration sets can be applied.

Product models are customizable templates used to create physical or PDF products.

Starting and Quitting Customers

Customers is typically available at first activation upon **Workforce Manager**, **HRIT Manager** or **Global Case Manager** is installed. You must be a member of a user group with the system right **Customer** to open it.

Start Customers

1. Click **Start** > **All Programs** > **Work Product** > **Utilities** > **Customers**.
2. Enter a valid user name and password to log on to the system.

Note: If your system is configured to use **Windows Service Authentication**, go through **Personalization** in **Desktop** and be careful for choosing the **Default** of your system.

Quit Customers

- In the **File** menu, click **Quit**.

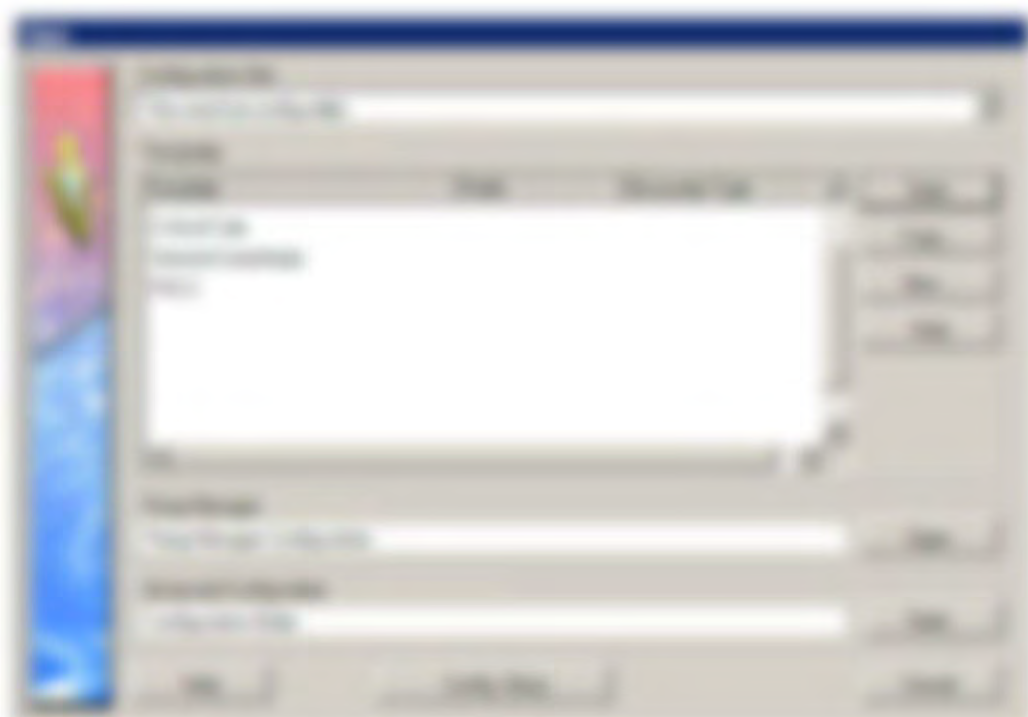
Working with Customers

When you open **Customers** only the **File** and **Help** menus are initially available and there is just one button the **Open** button.



The **File** menu provides access to the **Work Product Builder**. Use this to create product models and apply them as configuration sets. The **Work Product Builder** is described in section **Customization**, step 11.

The **Open** button provides access to the "Open" window. Use this to configure template, authentication and configuration set details.



The Customizer interface is designed to be intuitive and easy to use. It allows you to make changes to your theme's appearance and functionality in real-time, without the need for coding or a development environment. The interface is divided into two main sections: a left sidebar with a color palette and a main preview area with a grid of options.

Section	Description of use
Configuration	This section allows the configuration of the site's appearance and content. It includes options for the site's title, tagline, and various theme settings. The only use of this page is to set the site's appearance and content. The only use of this page is to set the site's appearance and content. The use of configuration settings includes "The custom configuration" and "The custom configuration" and other configuration settings will be the custom configuration. Note: When you select the custom configuration settings will only be able to change "The custom configuration". When using the "The custom configuration" settings, you will be able to change only the custom configuration. When using the "The custom configuration" settings, you will be able to change only the custom configuration.

Concept	Description of use
Template	After selecting a configuration set, you can open a template for editing, create a new template, copy a template, or clone a template. Editing. Any template after you make an on-heap change related to the selected configuration set. You can modify template-specific settings, opening the template and going on online to the “Customize” menu, which provides a subset of the most common configuration settings. Although these settings can also be modified using the configuration editor, the advantage of using the Customization menu is that editing is restricted to what’s allowed. Cloning. After cloning a template you can open a template that was configuration set it was the configuration set. This is not used to select a template before cloning a template. Adding. You can add a template on top of the set you’re on-heap related to the selected configuration set. For more information, see Using Templates, on page 111. Note: The Profile and Grouping Type settings are read-only. If you need to change the profile or grouping type of an existing template you will see the Set button. For more information, see Customization, on page 111.
Press & drag “New” button	After selecting a configuration set, you can click the button to add Press & drag settings.
Security button	Click this button to create configuration set and configuration set in the configuration set to configuration which effectively assigns the configuration set to configurations. Note: Additional security rights are required to use this feature. This button will be disabled for users without such rights.

Editing a configuration set – what you can do

- Edit a template. For more information, see [How to Use Configs](#), on page 111.
- Create a new template. For more information, see [Creating New Templates](#), on page 111.
- Create a copy of a template. For more information, see [Creating New Templates](#), on page 111.
- Edit configuration settings. For more information, see [Customizing Configuration](#), on page 111.
- Edit Press & drag settings. For more information, see [Press & drag Configuration](#), on page 111.

Note: This is only a list of icons which you must first select an appropriate configuration set and then the icons show up.

Setting up workgroups and configuration sets - what you can do

- Create workgroups and assign members to them. For more information, see [Creating and Editing Workgroups](#) on page 23.
- Create and configure sets and assign them to workgroups. For more information, see [Creating, Editing and Deleting Configuration Sets](#) on page 23.

The Customer Toolbar

After logging in for an existing group the following toolbar is available:



	Open the 'Open' window. For more information, see Working with Customers on page 23.
	Save any changes made to the open document and update the settings.
	Go to the settings window. For more information, see The Advanced Settings Window on page 23.
	Configure the Resources section in the Performance tab.
	Performance Monitor
	Process
	Event
	Real Time



Table of Contents

Introduction

Getting Started

Table

Table of Contents

Table

Table of Contents

Table

Configuration Sets and Workgroups

About Configuration Sets and Workgroups

Configuration sets

FireEye Manager stores application properties and installation settings and can be configured as a "configurable set". You can use this feature to create and edit configuration sets and assign them to groups of endpoints, called "workgroups".

Configuration sets are stored in the database, while FireEye programs on the endpoint receive updates from the configuration sets that are assigned to their workgroup.

You can create two or more configuration sets applied to a configuration set and are applied to the following order:

1. **Fire default configuration**
Contains all required settings and their respective default values. The Fire default configuration cannot be edited.
2. **Managed configuration**
Used as general "managed" settings that apply from the Fire default configuration. (The managed configuration is applied to all endpoints in the system regardless of whether or not they are assigned to workgroups.)
3. **Configuration sets assigned to specific "workgroup"**
Used for settings that apply to some endpoints, but not others. You can specify the order in which they are applied.
4. **The local endpoint configuration**
This is listed as "Endpoint configuration" in Customer.

Start by setting that apply only to the local workstation:

Note: In this guide, the different types of configuration sets are also referred to as “local” and the “highest” level using the First default configuration set for “local” and using the local workstation configuration.

Note: For servers, only the First default configuration set for the local workstation configuration set applies.

If the same entry has different values in different configuration sets, the value coming from the software is that of the last configuration set applied to the workstation. (See the examples at the end of this section.)

Note: An entry can be a list of items. In the case of software releases, each item in the software set the value that from the last configuration set applied to the workstation. There is no merging of the items from different configuration sets.

Configuration set version

Configuration sets can be numbered. You can create ordered versions of the same set and make any change the entry version. When you use a new configuration set it is given the version number 1. Each time you create a new version it is an even step of the highest available one and the version number increments by 1. When you open a configuration set in Customer it is always the last version that is active.

You can only set one version as the active version. This is the version that will be applied to customers.

Note: To set a new configuration set version is deactivated. When it is ready to be applied to customers, you should set it as the active version.

2. CUSTOMER: Customer always opens up what version is a configuration set to setting. When creating a new version of a configuration set, you set to high set as active version.

The Hospital Configuration

The Hospital configuration cannot be numbered. Because of this and to reduce complexity, only in the Hospital configuration should be kept in an absolute version. It should only include settings that are common to all workstations and intended to work directly with data, such as the first language in your system default address. It should not include new templates.

Best Practice: Even if your First system consists of a single department with identical workstation settings, create a configuration set for the whole department after the ordering of configuration parameters in the Hospital level.

“Test Machine Configuration”

Local machine configurations are useful for testing configuration changes prior to applying them to other machines. However, the configurations cannot be executed directly. Because of this, three scenarios that let testing the effect of configuration settings are provided as follows:

1. Create a “test” configuration set with a name that includes the machine name.
2. Create a “test” workgroup containing only the test machine.
3. Apply the “test” configuration set to the “test” workgroup.
4. Add the “test” configuration set as required.

Workgroups

Configuration sets are applied to computers in “workgroups”. **Workgroups** are logical computer groupings. Workgroup sets are linked to computers in the following way:

1. You create workgroups and add computers to them.
2. You assign configuration sets to workgroups.

Note: A computer can only belong to one workgroup.

Note: A configuration set can be applied to more than one workgroup.

Note: A workgroup can have multiple configuration sets applied to it. Also, not all the sets it owns are applied to it.

Examples

In the following examples, configuration sets A and B are applied to the same workgroup and configuration set B is applied after configuration set A.

Example 1

Configuration set	Name of workgroup
First set	A
Second	A
Configuration set A	not set
Configuration set B	not set
Local machine test	not set

Configuration Sets and Workgroups

Result: The value "0" gets applied to the workstation.

Example 2

Configuration set	Value of a system parameter
First default	0
Workgroup	0
Configuration Set A	0
Configuration Set B	not set
Local workstation	not set

Result: The value "0" gets applied to the workstation.

Example 3

Configuration set	Value of a system parameter
First default	0
Workgroup	0
Configuration Set A	0
Configuration Set B	0
Local workstation	not set

Result: The value "0" gets applied to the workstation.

Example 4

Configuration set	Value of a system parameter
First default	0
Workgroup	0
Configuration Set A	0
Configuration Set B	0
Local workstation	0

Result: The value "0" gets applied to the workstation.

Creating and Editing Workgroups

This section describes how to perform the following steps:

- View the computer/workgroup assignments
- Create a workgroup
- Add computers to a workgroup
- Remove a workgroup
- Delete a workgroup

Note: The Workgroup that governs system logs is required to open logs.

For information on creating and editing configuration sets, see [Creating, Editing, and Deleting Configuration Sets](#) on page 217.

Best Practice: Keep the number of workgroups to a minimum to reduce maintenance.

Best Practice: Create a workgroup named `WORLDWIDE` for those workstations that are to target work to the `workgroup` in configuration sets in the workgroup.

Best Practice: Create a workgroup named `WORLDWIDE` for those workstations that only have administrative control programs installed. Do not assign any configuration sets to the workgroup.

View the computer/workgroup assignments

1. In the "Open" window, click **Config. Setup**.
2. Click the **Computers and Workgroups** tab.
Assigned computers are shown in the left pane; assigned workgroups are shown in the right pane. Below the names of the workgroups in right pane are assigned.
3. If necessary, view the list of assigned computers by entering text in the **Computer name filter box**. This computer name filter box can be used to filter the list and be closed. (To remove a filter, click the **x** on the right side of the filter box.)
4. If necessary, view the list of assigned workgroups by entering text in the **Workgroup Name filter box**. This workgroup filter box can be used to filter the list and be closed. (To remove a filter, click the **x** on the right side of the filter box.)
5. Click **Close**.

Create a workgroup

1. In the "Open" window, click **Config. Setup**.
2. Click the **Computers and Workgroups** tab.
3. Click **Add**.

1. In **Configuration**, enter a workgroup name and click **OK**.
2. If necessary, enter the computer as described in the previous procedure.
3. Add one or more computers to the workgroup by selecting the computer names in the left pane and then clicking the double right arrow.

Note: To select multiple computers, hold down the **SHIFT** or **CTRL** key while you click the names. **SHIFT** allows you to select adjacent items, **CTRL** allows you to select non-adjacent items.

4. Click **Done**.

Add workstations to a workgroup

1. In the **Open** window, click **Control Panel**.
2. Click the **Computer and Workgroups** icon.
3. If necessary, enter the computer as described in "Join the computer to a workgroup" in the previous steps.
4. Select one or more computers in the left pane.

Note: To select multiple computers, hold down the **SHIFT** or **CTRL** key while you click the names. **SHIFT** allows you to select adjacent items, **CTRL** allows you to select non-adjacent items.

5. Click **Move**.
Move the workgroup name in the right pane, so that it is at the top.
Click **Work and Share** functionality. Click the selected computer, keep the left mouse button pressed until you move the cursor directly above a workgroup name in the right pane and then release the mouse button.

6. Click **Done**.

Remove workstations from a workgroup

1. In the **Open** window, click **Control Panel**.
2. Click the **Computer and Workgroups** icon.
3. If necessary, enter the computer as described in "Join the computer to a workgroup" in the previous steps.
4. Select one or more computers in the right pane.

Note: To select multiple computers, hold down the **SHIFT** or **CTRL** key while you click the names. **SHIFT** allows you to select adjacent items, **CTRL** allows you to select non-adjacent items.

5. Click **Remove**.
Click **OK**.
Click **Done**.

Use "drag and drop" functionality. Click the selected computers, keep the left mouse button pressed while you move up under **Workgroups** in the left pane, and then release the mouse button.

6. **Close Files**

Remove a workgroup

1. In the "Open" window, click **Control Panel**
2. Click the **Computer and Workgroups** icon
3. If necessary, click the computer as described in [Step 1](#) of **Computer and Workgroups** assignment, at [page 11](#)
4. Select a workgroup in the right pane and click **File**
5. In **Workgroups**, modify the workgroup name
6. **Close Files**

Save workgroup

1. In the "Open" window, click **Control Panel**
2. Click the **Computer and Workgroups** icon
3. If necessary, click the computer as described in [Step 1](#) of **Computer and Workgroups** assignment, at [page 11](#)
4. Select one or more workgroups in the right pane

Note: To delete multiple workgroups, hold down the **Shift** or **Ctrl** key while you click the **File**, **Edit**, **Delete** or **Remove** options menu. **Ctrl**, allows you to select non-adjacent items.

5. **Close Files**
6. **Close Files**

Creating, Editing and Assigning Configuration Sets

This section describes how to perform the following steps:

- Create configuration sets and their assignments in workgroup
- Create a configuration set
- Create a new version of a configuration set
- Remove a configuration set
- Delete a configuration set
- Select the active version of a configuration set
- Download a configuration set
- Edit a configuration set

Configuration Sets and Workgroups

- Design configuration sets to be assigned
- Add a configuration set

For information on assigning configuration sets to computers, see [Creating and Editing Workgroups](#), in chapter 11.

Note: For all of these steps except adding a configuration set, the Configuration Management system right is required.

Best Practice: Keep the number of configuration sets to a minimum to allow maintenance.

Best Practice: Before adding a configuration set, create a new server and map it to the role that is to be applied to computers.

Best Practice: Before adding a configuration set, make sure the system is in a condition that has the configuration set applied to it. This will allow you to see the effect of configuration changes at the computer. If an other configuration set is also applied to other computers that demonstrate that you can't apply configuration software at a computer belonging to any of these computers, following this step is right.

1. **CAUTION:** This procedure that you might establish communication guidelines to avoid making any other a configuration set at the same time. Otherwise, that the agent, attachment, adding, and the details are the appropriate.

How configuration sets and their assignments to workgroups

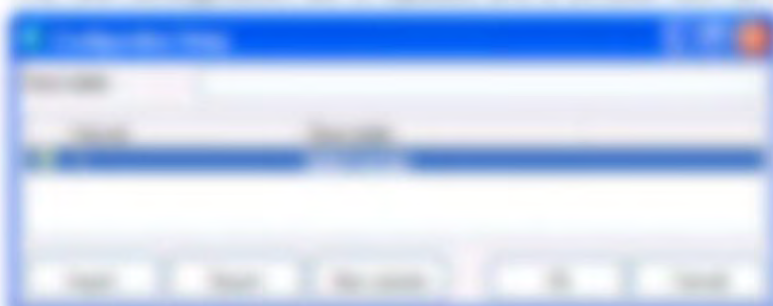
1. In the "Host" window, click **Config. Setup**.
2. Click the **Configuration Sets and Workgroups** tab.
The left pane shows 1 configuration set, assigned configuration sets are those in the right pane below the name of the workgroup to which they are assigned.
3. If necessary, click the list of assigned configuration sets to ensure that in the **Configuration Set** or **Workgroup** list. This configuration set makes that which the set will be used. The system is able, with the set on the right side of the list box.
4. Click **Done**.

Create a configuration set

1. In the "Host" window, click **Config. Setup**.
2. Click the **Configuration Sets and Workgroups** tab.
3. If necessary, click the configuration sets, as described in the previous procedure.
4. Click **Done**.

- To open with a blank configuration set (not based on any other default configuration), select **New blank configuration set**.
- To open with a copy of an existing configuration set, select **Based on an existing configuration set** and again select the configuration set that you want to copy. For the step, click **OK**.
- Click **OK**.

The new configuration set is opened and is similar to the following screen:



- In **Workgroup**, type a name for the configuration set.

Note: The name character set is not permitted at the beginning of the name.

- Click **OK**.
- Click **Close**.

Create a new version of a configuration set

- In the **Tools** window, click **Security Setup**.
- Click the **Configuration Sets and Workgroups** tab.
- If necessary, filter the configuration sets as described in [Using configuration sets and their components in Workgroup](#) on the previous page.
- Select a configuration set and then click **OK**.
You can filter the list of configuration sets by entering text in the **Configuration Set name** **Filter** box. Only configuration sets that contain that content the text will be listed.
- Click **New version**.
- In **Workgroup**, type a name for the version and click **OK**.
- To set the version as the active version, select **Set this version as active**.
- Click **OK**.
- Click **Close**.

Remove a configuration set

- In the **Tools** window, click **Security Setup**.
- Click the **Configuration Sets and Workgroups** tab.

3. If necessary, view the configuration set, as described in [View configuration sets and their components in Workgroup](#) on page 22.
4. Select a configuration set and then click **Edit**.
(You can filter the list of configuration sets by entering text in the **Configuration Set name** filter box. Only configuration sets whose first words the text will be listed.)
5. In **Description**, change the name.
6. Click **OK**.
7. Click **Close**.
8. Select **Customers** so the change is reflected in all pages of the application.

Delete a configuration set

1. In the "User" window, click **Security Setup**.
2. Click the **Configuration Sets and Workgroups** tab.
3. If necessary, view the configuration set, as described in [View configuration sets and their components in Workgroup](#) on page 22.
4. Select a configuration set and then click **Delete**.
(You can filter the list of configuration sets by entering text in the **Configuration Set name** filter box. Only configuration sets whose first words the text will be listed.)
5. Click the **yes** prompt for confirmation.
6. Click **Close**.

Search the active version of a configuration set

1. In the "User" window, click **Security Setup**.
2. Click the **Configuration Sets and Workgroups** tab.
3. If necessary, view the configuration set, as described in [View configuration sets and their components in Workgroup](#) on page 22.
4. Select a configuration set and then click **Edit**.
(You can filter the list of configuration sets by entering text in the **Configuration Set name** filter box. Only configuration sets whose first words the text will be listed.)
5. Select the operation that is the action that you want to activate.
6. Click **OK**.
7. Click **Close**.

Note: This can be done only for sets of a type.

Activate a configuration set

1. In the "User" window, click **Security Setup**.
2. Click the **Configuration Sets and Workgroups** tab.

6. If necessary, enter the configuration site as described in [Using configuration site and site management in Workgroup](#) on page 10.
7. Remove a configuration site and then click **OK**.
(You can also delete all configuration sites by clicking **Yes** in the Configuration Site name **Warning** box. Only configuration site names that appear in the list will be listed.)
8. Close the **Warning** dialog in the action response as described in [Using configuration site](#) on page 10.
9. Click **OK**.
10. Click **Close**.

Set a configuration site

- In the "Host" window, select the configuration site you want to set in the Configuration Site **Warning** box.

Note: If you do not have the Configuration Management system right only, "This system configuration" will be available to you. The sites you perform will only affect the local installation.

After setting one parameter, all other for selected configuration site. If the configuration site is shown you will be again a warning message indicating that any other you make all other any changes related to the configuration site.

You have the following options:

- Set a template. For more information, see [Using the Site Config](#) on page 10.
- Create a new template. For more information, see [Creating NEW Template](#) on page 10.
- Create a copy of a template. For more information, see [Creating NEW Template](#) on page 10.
- Set workspace settings. For more information, see [Workspace Configuration](#) on page 11.
- Site Proxy Manager settings. For more information, see [Proxy Manager Configuration](#) on page 11.

Note

Monitor using Customer, you can also set configuration site as follows:

- Use Workspace Manager. After Monitor of Global Proxy Manager is made, workspace is created and then it is configuration site. For more information, see [The Workspace user Guide](#).
- Use API. Instructions to create service file and set them in configuration site. For more information, see [Using API](#) on page 10.

Setup configuration site to a workgroup

1. In the "Host" window, click **Config Site**.
2. Click the Configuration Site and Workgroup tab.

Configuration Sets and Workgroups

1. If necessary, enter the configuration sets as described in [Using configuration sets and their dependencies in workgroups in chapter 28](#).
2. Select one or more configuration sets in the left pane.

Note: To select related configuration sets, hold down the **Ctrl** or **Cmd** key while you click the items. Shift allows you to select all items between, and allows you to select non-adjacent items.

3. Select:
 - Select the workgroup name in the right pane and then click the **OK** button.

Now "drag and drop" functionality: drag the selected configuration sets from the left pane to the right pane. Alternatively, click the **OK** button directly above a workgroup name in the right pane and then release the mouse button.

Note: Configuration sets will be added to the workgroup and names indicating the order in which it will be applied in that workgroup. Number 1 is applied first, then number 2 and so on. In the case of conflicting settings, the last of the sets in configuration sets applied wins.

4. If you apply more than one configuration set to a workgroup you can use the **Up** and **Down** buttons to change the order in which they are applied.
5. Close Workgroup.

Example: This example applies two workgroups to computers using the **IT** department. The first workgroup is common configuration set 1 that applies and then all the specific configuration set settings that the specific configuration sets override those of the common configuration set.

1.  Workgroup
 - 101 - All User Configuration Set
 - 102 - Another Configuration Set
2.  Workgroup
 - 201 - All User Configuration Set
 - 202 - Another Configuration Set

Remove configuration sets from workgroup

1. In the "Work" window, click **Config. Setup**.
2. Click the **Configuration Sets and Workgroups** icon.
3. If necessary, enter the configuration sets as described in [Using configuration sets and their dependencies in workgroups in chapter 28](#).
4. Select one or more configuration sets in the right pane.

Note: To select multiple configuration sets, hold down the **Ctrl** or **Cmd** key while you click the items. From above you can select separate items, **Ctrl** click you can select one separate item.

1. **Copy**
Click **Remove**
to
The "Copy and drag" functionality: Click the selected configuration sets, drag the left mouse button pressed while you move the cursor elsewhere in the left pane and then release the mouse button.
2. **Save State**

Configuration Troubleshooting

This section describes the troubleshooting steps to perform when faced with certain issues related to configuration sets. Perform the steps in the order shown.

Only one or a configuration are not reflected in the end user application at a certain machine

For the user of course, the configuration is referred to as "the active configuration" in the following steps:

1. Repeat the application concerned: not clear if the user already did this, proceed to the next step.
2. Check that the machine is identified as a workstation (the master configuration and configuration sets are never applied to servers)
 - a. In Windows, go to **System** in the **Administrative Tools** and **System** in **Control Panel** and check the active type of the machine. It should be set to "W". If it is not, in the other, proceed to the next troubleshooting step. Also other user indicates the machine is set up as a server.
3. Step the step if the active configuration is the master configuration. Check that the set server of the active configuration set is active. If it is not, set it as active.
4. Step the step if the active configuration is the master configuration. Check that the active configuration is applied to the settings that the machine is in.
 - a. Identify the workgroup that the machine is in.
 - b. Check if the active configuration is applied to the workgroup. If it is not, determine if this is an error or "by design" and proceed accordingly. If it is, proceed to the next step.
5. Check that the master value is not overruled by a value from another configuration.
 - a. Open "The master configuration" at the machine concerned in the Configuration Editor, open the section concerning the value that is not active and check the set shown in the "Configuration Set" column for that step. The set indicates the origin of the value that is eventually applied at the workstation. If the origin is not the configuration that you edited,

depending if this is an error or “by design” and present accordingly. If the error is the configuration ID you edited, proceed to the next step.

4. Close the work area application completely. In Windows Explorer, search for the file “CustomWorkgroup” and run and delete it. Restart the application and check in the next period.

An expected template from a configuration set is not shown in the template list

This has been built up as this way by the system administrator to support editing of templates that are not applicable to the workgroup that the configuration belongs to. Contact your System Administrator for more information.

Printout Models

Note: Downloaded printout sets no longer supported for use at requesting customer. Product models may automatically update to create sets or sets using the Printouts Bundle and do not require either Microsoft Word or a PDF viewer.

Step: The section describes how to create and deploy printed models. For information on configuring how these models are used, please see the following sections:

Template-based printed models: Product document settings on page 111

Workstation-based printed models: Product driver configuration settings on page 111 and **Advanced Product configuration settings** on page 111

About Printout Models

The new Printouts Bundle allows you to create complete printout templates, called "models". After creating a printed model you assign it to configuration sets. Its configuration is stored those configurations with the model, and users can select the chosen printed model when printing.

Printout models consist of one or more "sections". When printed, each section prints on a new page or all generated or last one printed page. Therefore, there is no direct correlation between the number of sections and the number of printed pages. In the Printouts Bundle a section may look like a single page, but also like all or a portion of a page or a configuration is made from one page.

Product Models

About Product Models

Product models "float" top and bottom of the page from the desktop when the product is loaded. The product's model tags determine how much product information is on the page and how the items appear in marketing ads. For information on model tags, see [Model Tags](#) (page 11). Product models can have the same page information regardless of what is loaded and how.

Workflow for Creating and Deploying a Printout Model

A typical workflow for creating and deploying a printout model is as follows:

1. Create the first version of the model.
2. Create design items that you may reuse (e.g., images and custom pages, blocks, columns, forms, etc.) that are available for all printout models.
3. Set the page size, margins, and gutter (if any). (This is the default font. It can be incorporated in a design template.)
4. Create one or more sections.
5. For each section, configure the heading, footer, and repeat rule.
6. For each section, add blocks and containers as required.
7. Rearrange sections as required.
8. Preview the model.
9. Publish the model.
10. Use the published model as configuration data.

The model document is available for use as configuration data when these configuration data are applied.

Opening and closing the Printout Builder

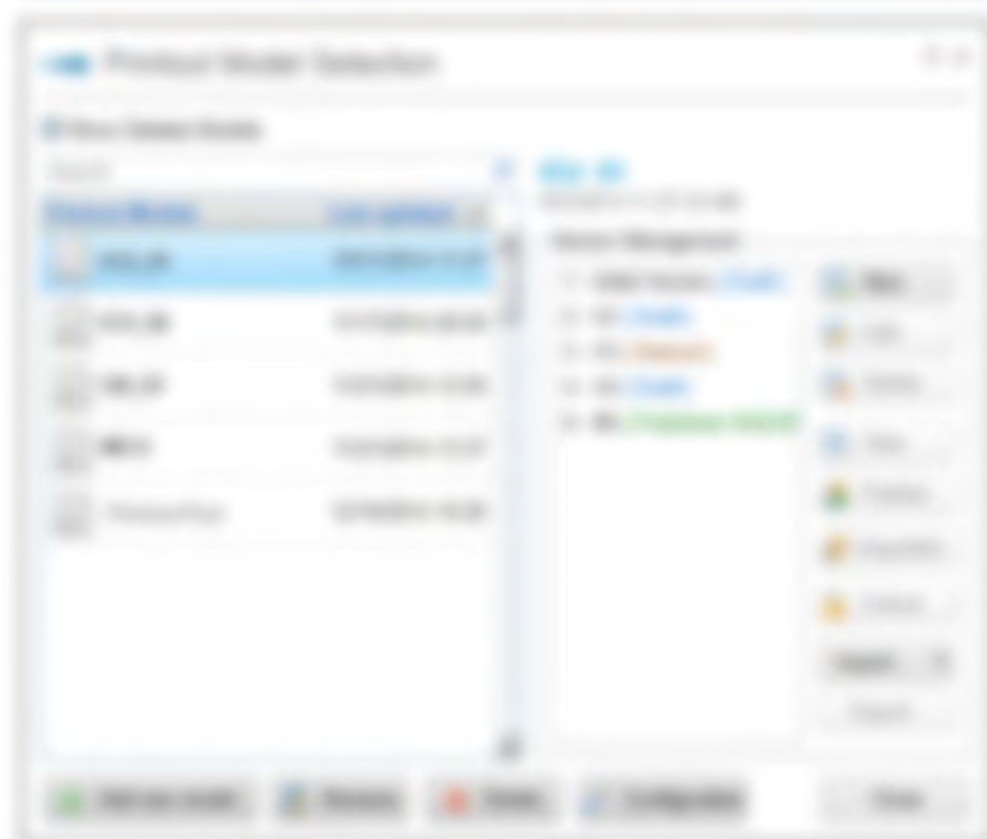
Open the Printout Builder

1. Open Customer, as described in *Creating and Deploying Customers* on page 33.
2. In the File menu, click **Printout Builder** > **Printouts**.
The Printout Model Selection window appears.

Close the Printout Builder

- Click **Close**.

The Product Model Selection Window



The left side of the window shows the product models available.

The right side of the window shows the attributes available for the selected model and their values (if available) as defined in the configuration file and the first available version. The version is automatically defined when it is available.

This window is the starting point for creating and editing models and versions of them, for the designing models in configuration sets. You can also use the window to create mappings and maps of product model versions.

Managing product models

- To show selected model, select **Show selected models** at the top of the window.

Selected models are shown in table.

Search for a model

- You can also search for models by name – go back up to the top typing in the Search text box and you will display only the entries whose names contain the typed text.

Sort the list of models

- To sort the list of models alphabetically, click the column header 'Product Model' (this is the header in column 10 in screen 100).
- To sort the list of models by date when model first, click the column header 'Last updated' (this is the header in column 11 in screen 100, so long as the column is active.)

Create a new model

1. Click **Add new model**
2. In the window that appears, type a name for the model and click **OK**.
The Product Model window opens for editing.

Note: The first time that you create a new product model after starting Customer it will save default attributes to you.

Note: Even if you do not make any edits yet you will save the model when closing the Product Model window for the model to be created correctly.

Remove a model

1. Select the model and click **Remove**.
2. In the window that appears, type a new name for the model and click **OK**.

Save a model

1. Select the model and click **Save**.
2. You will be shown a warning message. Click **Yes** to proceed.

Note: The name of the model will appear in bold in the Product Selection window on **Model master models** is selected. It will no longer be available at any configurations. However, a double click between the model and any configuration will get it applied to a customer. If you then select the model it will be there in the configuration with that it was added to at the time of saving.

Remove a deleted model

1. Select the deleted model.
When you do this, the 'Delete' button changes to an 'Unlink' button.
2. Click **Delete**.

Product Models

The Product Model Selection Window

Back up a product model version

1. In the left pane, select a model.
2. In the right pane, select a version of that model.
3. Click **Export**.
4. Browse to the folder where you want to store the product model file, type a name for it and click **Save**.

The file is saved with the extension **CPM00 (Open Product Model)**.

Create a new product model by copying an existing model version

1. In the left pane, select the model you want to copy.
2. In the right pane, right-click the particular version you want to copy and select **Copy as new model**.
3. In the window that appears, type the name you want for the new model and click **OK**.
4. The new model is added to the top of models and opens for editing.

Create a new product model version by copying an existing model version

1. In the left pane, select the model you want to copy.
2. In the right pane, right-click the particular version you want to copy and select **Copy as new version**.
3. In the window that appears, type the name you want for the new version and click **OK**.
4. The new version is added to the top of versions for the currently selected model.

Create a new product model by importing a template

1. Back up the product model version that you want to duplicate following the "Back up..." steps for that procedure.
2. Click **Export > Export as a new model**.
3. Browse to the folder where the template is stored; the is located, select it and click **Open**. The product model opens for editing.

Note: Even if you do not make any edits, you must save the model after opening the Product Model in order for the model to be created properly.

Create a new product model version by importing a template

1. Back up the product model version that you want to import following the "Back up..." steps for this procedure.
2. In the left pane, select the model into which you want to import the product model template.
3. Click **Export > Export as a new version**.
4. Browse to the folder where the template is stored; the is located, select it and click **Open**.

The product model version opens for editing.

Note: Even if you do not make any edits and you just save the version after closing the Product Model window, the model is the model version.

Versioning and Publishing

When you create a product model, it has an initial version with the name "Draft".

Versions in draft status can be edited, but are not available to end users.

Best Practice: When editing a model, create new versions as you go along. Version names are 4 digits that you can easily count to 4 numbers.

When you reach finished editing, create one final editing version and save the model as a configuration. All new models are available to end users. After publishing, the model you edit is merged with the published version. The status changes to "Published".

If you want to make further edits to a model after publishing it, create a new version. The new version will always add up to the version it is based on. Add the new version as separate. When you are ready to replace the published version with the new version, get published. This will publish the new version and will also permanently publish the previous version (status is "Released"). It will not automatically release the previous model to available. The new published version automatically releases the other version. (But users only need see the name of the model, not the version.)

When a version is opened for editing it becomes locked. The user provides Customer access of other applications from simultaneously editing the same version. These users see a editing symbol  next to the version name, together with the name of the user who is editing the version. Sometimes the text may read "in development" or "ready for approval". If a user's meeting expires or if a user is off work and others still suggest it in the application.

Create a new version

1. Select the model in the left pane
2. On the right, click **New**

A new version will be created based on the last version of the model.

Open a version for editing

1. Select the version in the right pane
2. Click **Edit**

Save a version

Note: Saving a version is just save, unlike creating a product. The status cannot be modified.

Product Models

The Product Model Selection Window

1. Select the category in the left pane.
2. Click **Details**.

Open a product selection for a version

1. Select the version in the right pane.
2. Click **Open**.

Publish a version

1. Select the category in the left pane.
2. Click **Publish**.

Note: Publishing a version automatically updates the previously published version of the same product model.

Unpublish a published version

1. Select the version in the right pane.
2. Click **Unpublish**.

Assigning Models to Configuration Sets

After publishing a model, you can assign it to one or more configuration sets. (The model will then become available as an option to apply the configuration set it is applied to.)

Assign a model to a configuration set

1. **Open Configuration**
The Product Model Configuration window appears. The left pane shows published product models.



1. Under **Proteus Models**, select a model.
2. Under **Configuration File**, select a configuration file.
3. When the right arrow (→) is active, the selected model is the selected configuration file.
4. Click **Apply** and wait.
5. A confirmation message appears.
6. Click **OK**.

Remove a model from a configuration file

1. Click **Configuration**.
2. In the **Configuration File** pane, double-click configuration file that you want to remove the model from and select the model beneath it.
3. When the left arrow (←) is active, the selected model from the configuration file.
4. Click **Apply** and wait.
5. If any information present instance is associated with the model name, **Remove Model**, **Remove Model**, or **Remove Model** is warning message will appear you that the selected model will be removed. If you choose to remove.
6. A confirmation message appears.
7. Click **OK**.

The Product Builder Window

See Product Builder settings online: Check the status of the Product Builder software license for more information. See www.siemens.com/itn.

When you open a project for editing, the Product Builder window opens. The window has four areas:

- **Top:** Windows with page navigation controls and other configuration settings
- **Center:** Design area
- **Left:** Drag-and-drop components
- **Right:** Properties for the component that is selected in the Design area



Structure

Feature	Item Type
Name	Creating, editing, deleting, archiving, and unarchiving a product model
	Creating/deleting blocks, parts, blocks
	Creating/deleting block images
Product	Adding product images
	Configuring the global test setting for the product
	Adding product page title and metafile
	Adding and removing product sections
Section	Adding and editing product sections
	Adding section information (product, description)
	Adding/editing a section header/footer
	Adding section content (text, image, video)

Note: Changing a section title does not affect what is shown in the design area.

Components

The components area contains standard elements "blocks" as well as any custom-built blocks that are made available to the website "test site". For information on components, see [Components](#), p. 111.

Blocks are broadly categorized as four types:

Basic Blocks

Section -- a template-generated block is specific content identification field

Text -- set of words/text that you can add to the product. (For example, the number of pages in the product.)

Image -- any image from the image library. (Often used in headers.)

Label -- used to add text to the product. (Includes standard text, text formatting, capability.)

Page Size -- Size that is usually entered in **Page Manager** during the preparative evaluation workflow step.

Body Systems

Product Models

The Product Model Window

View Types

Attribute Data – Data that is usually entered in the 4th column the first column equals

the identification number type

Inventory Type

MR Code

Cost Category

Demographic

Program

Product

Inventory Category

Area Definition

Sample Information

Market Type

Demographic Group (geographic variable)

Area Demographics

Area Information

Product

Market Group

Market Research Data – Data that is usually entered during the session

Survey

Demographic

Why Information

Cost

MR Code

Cost Group

Product

Area Code

Inventory Storage

Inventory

Market

Market Group

Block-Container Summary

Setting Up a Block

Properties window

Properties

Style

Tools

Resizable - The block can only be added to a container section and cannot be a container

Block Definition - The block shows you information about a specific configuration. It does not show the configuration themselves.

(The customer that it is purchased the automatically.)

Containers

Text container

Image container

For more information on containers, see [Containers on page 33](#)

Block-Block

Block-Block-Block-Block-Block-Block-Block-Block-Block-Block

Selected Block Properties

Each component has properties that you can edit using the component in the design area. The list of component's properties in the "Block Configuration" panel is the right in the design area.

When opening a project for editing, the Block Configuration panel is collapsed. There are two ways to expand it:

- Right-click the component in the design area and select **Properties**.
- Select the component in the design area and then click **Block Configuration** in the right of the design area.

For more information on block properties, see the following section.

Block-Container Configuration

For containers, the only property that you can edit for the text area:

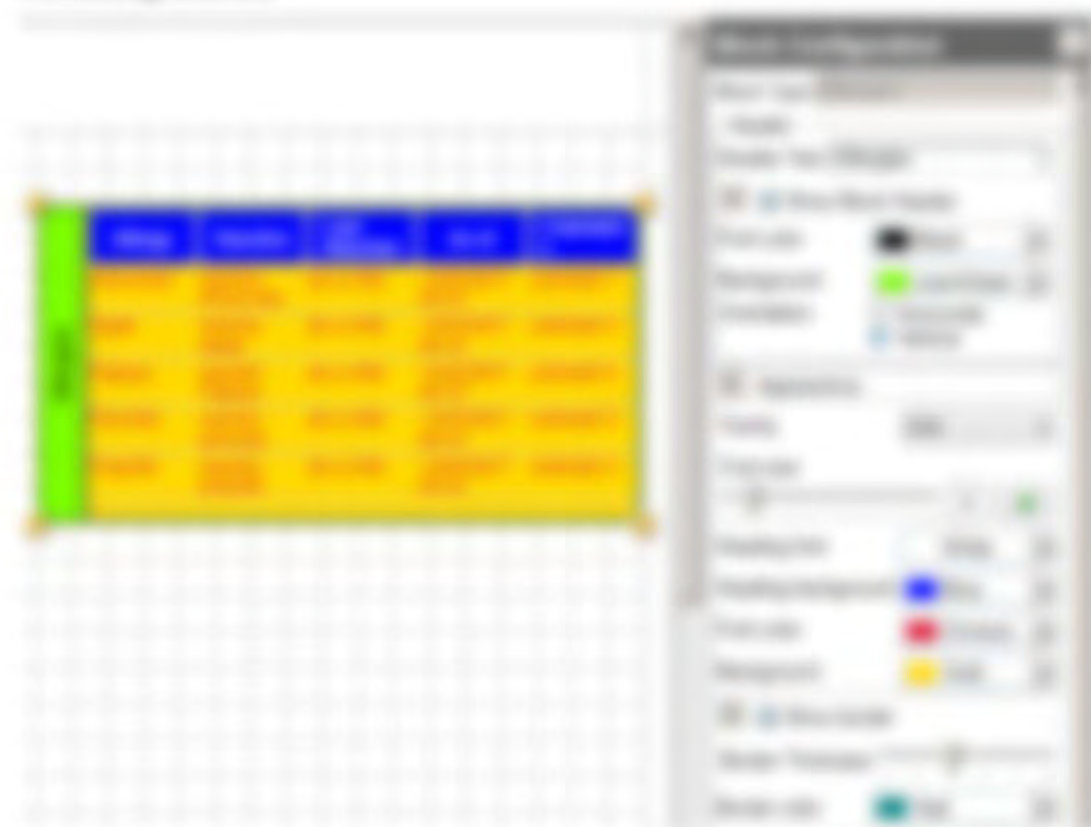
Note: For convenience, the text area contains the text you need to fill blocks within the template design space for which a specific text area has been set up, as well as the properties of the block.

For blocks, there are a number of standard properties processed by all blocks as well as some block-specific properties.

Standard properties for blocks

The following properties are standard for many blocks. Blocks are restricted to settings that are not well explained.)

Formatting controls



Note:

- If you specify a condition that you use in a block to set or target, support is not available for changes or updates to the block definition or the condition of the block or its condition. The user must

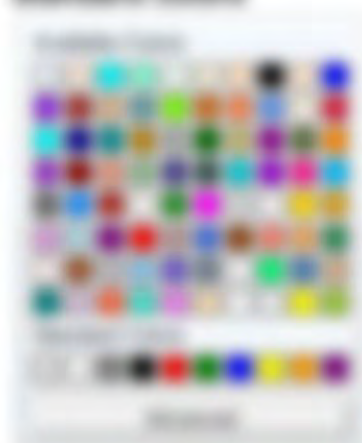
The Board can be set to the default by clicking the button  after you do this, the Board will restore depending to that state of your Board at the moment you clicked the button.

- For more information on other settings, see [Document settings](#) on the next page with Document settings on the next page.
- The **Heading Panel** and **Heading Management** settings refer to column headings. The **Panel** refers to **Management** settings refers to the other side of the body text.
- Settings in the **Board/Board Header** section all refer to the Board header.
- The **Board/Board** setting for **Header** determines whether the header has horizontally across the top of the Board or vertically down the left side.

Board Settings

Set ☐ Set to default ☐ Set to default	Notes Some boards have additional set options.
Panel ☐ Panel ☐ Management ☒ Management	Board with a column heading only Panel: This is changed to a grid structure of your choice. The top Board column heading setting applies. Management: If an entry has column heading values and values are specified in the Board. If you select this setting, a Management setting appears. The Board you to specify the number of columns you want across the page. This will only affect the column and grid only. This will not affect the other settings. Single value: If an entry has column heading values and if the user that you in the Board. Values are specified by each column.
Column	Select the column you want to show in the Board.
Ordering	Select the type that you want to display in the Board and you can be to and then choose to change the order in which you want to display them.

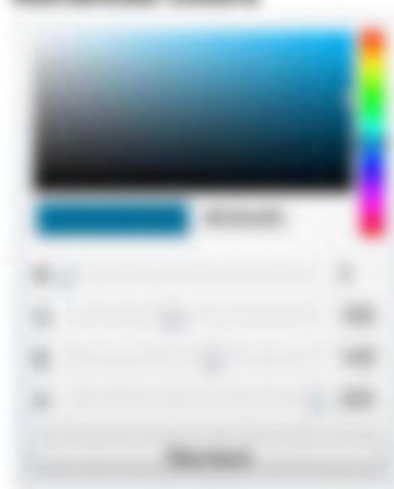
Standard colors



Colors in Excel are represented using color. After this color is set up, all appears as the white box is usually. (Screenshot) - This will use the same as a color by moving up color and it is a match with the name is displayed.

Excel is color or color (Screenshot) is across up color range of color.

Advanced colors



This window allows you to select color in three ways:

Option 1: First change the color position on the vertical color bar in the color of color that you are interested in. Then in the control window select the specific color that you want.

Option 2: Tap the hexadecimal code for the color in the control field. (Note that you can also paste a color into the field.)

Option 3: Enter an RGB value to either dragging up RGB values in the above that you want or typing a value in the field in the right of each color.

Note: The color slider (A) needs to be kept open! Drag this slider to set the transparency of the cell (make it as transparent background if needed).

Column widths

The column widths that do not represent fractional cells the column. The Frontend Module you can adjust the width of all columns. For double representing fractional cells, you can only adjust up width of the first column as described in the following section:

- To change up width of any column, first move the cursor over the dividing line in the right of the column until the cursor changes as follows:



Type above the drawing area and hold down the mouse button as you drag it to the desired width before releasing the button.

Block specific Properties

Type section describes the following blocks:

- [Image](#)
- [ImageTextTop](#)
- [ImageTextLeft](#)
- [ImageTextRight](#)
- [ImageTextBottom](#)
- [ImageTextTopLeft](#)
- [ImageTextTopRight](#)
- [ImageTextBottomLeft](#)
- [ImageTextBottomRight](#)
- [ImageTextTopLeftBottomRight](#)
- [ImageTextTopRightBottomLeft](#)
- [ImageTextBottomLeftTopRight](#)
- [ImageTextBottomRightTopLeft](#)
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- [ImageTextTopLeftBottomRightBottomLeftBottomRightBottomLeftBottomRightBottomLeftBottomRightBottomLeftBottomRight](#)
- [ImageTextTopRightBottomLeftBottomRightBottomLeftBottomRightBottomLeftBottomRightBottomLeftBottomRightBottomLeft](#)
- [ImageTextBottomLeftTopRightBottomLeftBottomRightBottomLeftBottomRightBottomLeftBottomRightBottomLeftBottomRightBottomLeftBottomRight](#)
- [ImageTextBottomRightTopLeftBottomRightBottomLeftBottomRightBottomLeftBottomRightBottomLeftBottomRightBottomLeftBottomRightBottomLeftBottomRight](#)

Image

Image ☐ Specify whether to show indication images, other images, or both.

Product Modules

Smart Commerce Configuration

SmartCommerce Page

SmartCommerce Item Type	Select the smartcommerce item types that you want to show in the block. To show all types, click Show All .
Columns	Shows you the number of columns you want across the page. This will wrap either each column and split each item into columns to fit the container width.

SmartCommerce

SmartCommerce Filter	Select the filters you want to be displayed. To select all filters, click Show All .	
- Price - Rating	To select specific filters, click them individually. You can also enable the setting to only show items in your shop going in the Shop tab for the page with filters, and the items whose items under the page tab.	

SmartImage

Image ID	Select the smartimage image. Choose from the following identifiers: - Product thumbnail - Image, image, image - gallery, gallery, gallery
Show value in text format	Select the option to show the text equivalent immediately below the image. Note that the overall block height is not affected.

SmartSystem

SmartSystem Item Type	Select the smart system item types that you want to show in the block. To show all types, click Show All .
Columns	Shows you the number of columns you want across the page. This will wrap either each column and split each item into columns to fit the container width.

Summary

Summary	Summary: select the fields that you want to display in the table and the order in which you want to display them. You can also remove the field title.
--------------------------------------	--

Grid

Group by field type Group by field type	Select the field type to group the data by. The groupings are presented in alphabetical order of field type. Group by field type is not supported. When you select a grouping, the associated data is listed according to the field setting.
Field type Field type	Select the field type you want to display. To select all field types, click Show all . To select specific field types, click them individually. You can also select the number of items to display. To select all items, click Show all . To select specific field types, click them individually. You can also select the number of items to display. To select all items, click Show all .

Page

Page layout Page layout	Specify the page layout: all layout, other layout or the layout.
Field settings Field settings	Select the fields that you want to show on the page.

Product Models

Microsoft Dynamics Configuration

Fixed Attributes

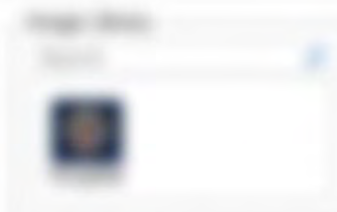
Display Attributes	Specifies the fixed options and attributes to appear in the display. (Only the display for items in a fixed-type attribute structure, where, where, or Fixed-also, is subject to attributes of the type. Alternatively, when the display-type attribute used in the fixed-type is displaying the attributes and then allows just the attributes are used in the display.
Fixed in	
Why print documented fields	When type setting, if you only want to print documented fields, when this setting is checked, there will not be any fields not for each documented field.
Interval in attribute	For the type in display, that each column will correspond to 1, 10, 15, 20, 30, 40 or 500.
Fixed Attributes	Specifies the type of fixed in display in the display, showing each fixed attribute, step, and in Fixed.
	Note: If you want each type to be shown in the type that you can do it by setting multiple instances of the Fixed in display and setting the Fixed Attributes of each fixed attribute.
Number of columns	Specifies between 1 and 20 how columns to show on each page.
	Note: In addition to the specified how columns field is always a "Total" column on each page showing the total for the current period for each attribute and in Fixed, up. Total column shows the total column for step, the Total column shows either the total column or the total total depending on the configuration.
Width	From the width in pixels of the first column. (Other columns adjust their size automatically depending on the Number of columns setting.)
Show data for step	For step only. Select this option if you want to show data for each step as requested. When this option is checked, step data column will not be null.
Show data for step (Total)	For step only. Select this option if you want the "Total" column to show the total data. When this option is checked, the "Total" column shows the total column.

Note: The system shows images when there are image products or it finds in the stock. If you select other in the show settings, the page that you see becomes "grayscale" to indicate that they are not shown.

Product List

Interval to update	Set up time in minutes to update each column with corresponding to 5, 15, 30, 60, 90 or 120.
Number of columns	Search between 1 and 10 the columns to show on each page. Note: In addition to the specified value columns there is always a "Total" column on each page showing the total columns for the selected period.
Width	Enter the width in pixels of the first column. Other columns adjust their size automatically depending on the Number of columns setting.

Image

Image library - Search	Type your string name for all images in the image library. To see the list and content of all image, enter the name and hit enter. You can also search for images by name, as well as you can typing in the Search field the name and images into the image library. It also contains the search bar.	
Stretch to fill	Select this option if you want your image to be proportionally resized to fit the container. When this option is checked, the image expands to fit the size. If the image is larger than the size, it will be cropped.	
Transparency	Drag the slider to set the image transparency.	

Label

Caption	Type the text that you want to appear in the label. Format the text using the standard document formatting functions in the text toolbar. Tip: The text in each column is always left justified. If you want a particular words, phrase in the center column or right column, click the justify and center icon in toolbar from the text block, positioning it in the same place where you set the words.
----------------	--

Smart Search

Labelling

Analysis

- Show all

- Search

Select the analysis you want to be displayed.
To select all analyses, click **Show all**.

To select specific analyses, click them individually. You can also search for analyses by name. A search bar is also located in the **Header** bar of the page with filters, only the selected analyses names remain the same.



Evaluation Details

Columns

Select the columns that you want to show in the table.

Evaluation

Include analysis
data in product
page

If you select this option, the last modification date is shown in product page (e.g. 'changed on 12/12/2020'). You can also select the last modification date (e.g. 'changed on 12/12/2020').

Interval in minutes

For the table to include the last modification date, you need to select an interval in minutes (e.g. 5, 15, 30, 60 or 120).

Page

Select this option if you want the modification date to include the date in which the modification was performed (e.g. 'changed on 12/12/2020').

Number of
columns

Specify whether 2 or all the columns to show on one page.

Note: In addition to the specified time column there is always 'Page' shown in each page showing the total number of pages created.

Width

Enter the width in pixels of the table column. Other columns adjust their size automatically depending on the **Number of columns** setting.

Only print
documented
last modification

Select this setting if you only want to print documented modifications. When this setting is selected, there will be a stamp next to the last modification modification.

Product Models

SmartOptimizer Configuration

	This tab lists down the SMART way, and also the first and last tabs in a group of configuration items to select all at once. This tab lists down the OTHER way, and also individual items to make a further selection. - To change the position in which a variable is displayed, select the variable in the right pane, hit the left up  or down  arrow as required. - To remove variables from the selection, select the variables in the right pane and hit the left arrow . - Click OK.
Do print	Select this option to include any negative values in the result.
Interval to include	Set up this to include left-most values with corresponding to 0, 10, 20, 30, 40 or 100. Note: Columns show the left value included in the same period that this represents values from the next value.
Number of columns	Specify between 1 and 20 how columns are shown on each page. Note: In the block include specified in arranging data columns (page are included in the column count). Example: You set an interval as 10 minutes and 20 rows selected per page. Initially, the count value is 0 and if you set page that the block is printing. However, if a printed block of a page includes one negative from the last period covered in that page will be selected as 10 rows.
Width	Enter the width in pixels of the first column. (Other columns' width that are automatically depending on the Number of columns setting.)

Query Models

Columns	To arrange a column header.
Header	- Click Columns and select the column identifier. - in Header, type the text you want as the column header.
Tab title	Search to add the SQL query code, change the column width or all up.

	Do Not Edit Configuration is performed in the edit view, so when creating a new event. For more information, see Custom Event Details on page 55. Note: Changes only affect the current event. The library can be edited; the event is never to be modified.
--	---

Registered Events

Show	Select whether to include registered events, other events, and registered users.
-------------	--

Events

Show Event Name	Select the checkbox to show event names on the page. Otherwise, only the image will display.
Show Family - Show All - Search	Select the option you want to use. To search all families, select Show All. To select specific families, select them individually. You can also select the entire list of families by clicking on all checkboxes in the Search field. This is useful if you only the entire event series within the event list.



Event Notifications

Show Notification Events	Select the option to show additional details for each notification - displayed above the trigger for the notification and any trigger responses sent by the user.
	Checklist shown Checklist hidden



Variables

- Temperature in Celsius (Celsius)
- Temperature in Fahrenheit (Fahrenheit)

Expressions

- Temperature in Celsius (Celsius)
- Temperature in Fahrenheit (Fahrenheit)
- Temperature in Kelvin (Kelvin)
- Temperature in Rankine (Rankine)
- Temperature in Celsius (Celsius)
- Temperature in Fahrenheit (Fahrenheit)
- Temperature in Kelvin (Kelvin)
- Temperature in Rankine (Rankine)

Name: Temperature
Unit: Celsius
Description: Temperature in Celsius
Category: Temperature
Units: Celsius
Default Value: 0

Show All **Cancel**

Trails

The **Trails** tab in the **Variables**, **Expressions**, and **Units** variable editors contains the same information as the **Trails** tab in the **Properties** variable editor. See the information on that tab.

Trail Settings

Click to open the **Trail Settings** window and configure how each variable-variable appears in the **Trails** tab.



Trail Settings

Variable: Temperature **Unit:** Celsius

Variable	Unit	Color	Shape	Size	Line Style	Line Width	Line Color	Line Style
Temperature	Celsius	Blue	Square	100	Solid	2	Blue	Solid
Temperature	Celsius	Cyan	Circle	100	Dashed	2	Cyan	Dashed
Temperature	Celsius	Red	Triangle	100	Solid	2	Red	Solid

OK **Cancel**

1. If you want an overall view for all periods, under **Options**, either set the axis range in the **Range** and **By month** or, if you want the view to adjust automatically to the data entered, select **Auto scale**.

Type axis is applied to all variables (it does not have an independent x-axis setting).

2. Set characteristics for each variable, as follows:

- Under **Style**, select a type of graph (line, bar, bar or line).
- Under **Color**, click the drop-down box and select a color.

Note: The color scale will affect mappings. They are always black. This means that for multiple data series, the color only affects the graph of the variable but the text is black.

- Under **Markers**, select a graphic if you are configuring a scatter graph. For this graphic, markers are colored.
- To display the value for each of the points, click the **Labels** check box.



If you input a range of values for a parameter, it is not compatible with the overall range method, so it is a separate view for the parameter. When the **Style** check box is on, enter the range for the axis in the **Range** and **By month**.

Axis Range

Axis range names	Select the axis value that you want to show in the chart.
Columns	When you specify the number of columns you want, under the page bar, all data series in all columns and split into four columns in the next column bar display.

Variables

Page layout	Set the view as to by selecting one of the following 'overall' periods: 1, 5, 10, 15, 20, 30
	Select the items that you want to be displayed
Frame mapping	1. Auto/None : To avoid any variable conflict in graph, leaving the position of the axis Style and Labels are selected.

This section allows you to create tags, which are used in a range of workflow capabilities in Workforce Manager.

To create a tag, enter a name for it in the empty field and then click **Add tag**. The default tag, with the red icon next to it,

Note: When you create a tag, it becomes available on all product models, except the one you are editing. If you remove a tag, it is removed from all product models for which it is selected.

The next tag you add specifies whether you want locations or people with that tag to be displayed in the product.

If you do not select any tags or if you select **None**, then all locations or people are displayed, both tagged and untagged.

Tag



Product Management

This section describes standard tasks using the following commands in the Workforce Manager:

- [Open](#)
- [Save](#)
- [Revert](#)
- [Print](#)
- [Close](#)
- [Refresh](#)

[Return to another product model or session](#)

- [Go to the Workforce Manager page](#)

The product model you are viewing shows everything you can change if there are any and the Product Model Selection window opens.

Save changes to the version

- On the **Model** ribbon, click **Save**.
- Alternatively, click CTRL+S.

Remove the version

1. On the **Model** ribbon, click **Remove**.
2. In the window that appears, type a new name for the version and click **OK**.

Publish the version

- On the **Model** ribbon, click **Publish**.

Note: The current "in-progress" version, if you want it immediately to be a published version available to end-user workstations, needs the model you are able to publish it if needed.

Note: You can also publish a version from the Product Model Selection window.

View the version

- On the **Model** ribbon, click **View**. (You will be prompted to open the version if changes have been made.)

Preview the version to see how it will look when printed

You can update a preview of a 3D model using current data or, if you gave the necessary system rights, you can create a preview using real data by selecting a suitable version and print.

- To create a preview of a 3D model using current data, on the **Model** ribbon, under **Print Preview**, click **3D Model** and then click **Preview**.
The Print Preview window opens.
- To create a preview using real data, on the **Model** ribbon, under **Print Preview**, click **Select 3D part** and then click **Preview**.
The Select 3D part window appears. Select a version and then click **Open**.
The Product Model window appears. Select a data period or print and then click **Print**.
The print preview is shown in the right pane.

Product Blocks

Creating Library Items

Working in the Product window

You can move between pages using the scroll bar on the right.

You can search for text by typing it in the search bar at the bottom.

Tap **Search** to:

You can perform various actions from the toolbar:

- ☒ **Close** - Closes the Product window from which you have selected a product, and goes to the:
- ☐ Close selected text in app (containing custom content)
- ☒ **Back** -
- ☒ **Next** -
- ☐ **Reset zoom** - 100%
- ☐ **Zoom in** - the page width
- ☐ **Zoom in** - one-third page
- ☐ **Zoom in** - one-half page

Creating Library Items

You can create two types of library item for use in any product model:

- ☒ Custom query blocks
- ☒ Images

Custom Query Blocks

Custom query blocks give you more control over the data that is returned by the product model. You can create custom query blocks by writing a query in SQL, using the **Custom Query** block, or by using the **Custom Query** block to write a query in SQL. You can also create a custom query block by importing data from a file.

Note: To select more than one block, you can hold down the shift key while you click each block you to make adjacent selections. If the blocks you to select are adjacent blocks.

A query block is created for each file the block that you imported. These blocks contain the code that the file is as well as content in text and tables. Each query block's properties are required.

Add an image to query block

1. On the **Home** ribbon, under **Standard > Images**, click **Query Images**.
2. To add an image block, click it on right side of it and select **Image**.
To delete an image block, right-click it and select **Delete**.

Note: The block will not be removed from any printed models it is part of has been added.

Images

You can import any of the following formats: .JPG, .BMP, .PNG, .GIF. The maximum file size is 100

Note: When you add an image to the blocks, you are uploading it to the app server. The image is not stored anywhere in a file.

Add an image to the image block

1. On the **Home** ribbon, under **Standard > Images**, click **Image** > **Image block**.
2. Click on the block where the image will be located, select it and click **Image**.

Remove an image in image

1. On the **Home** ribbon, under **Standard > Images**, click **Image**.
2. To remove an image, right-click it and select **Remove Image**. Or, you can click and drag **Image**.
To delete an image, right-click it and select **Delete**.

Note: The image will not be removed from any printed models it is part of has been added.

Setting Global Properties

Global properties apply to the whole printed model version. You can set the following properties:

- Version name
- Page size

Long section starts on new page when printed

Adding, Removing and Ordering Sections

Add a section

1. At the bottom of the design area, click the new section icon ().
- 2.
3. On the **Product** ribbon, under **Sections**, click **Add Section**.

Note: A new section is always added after to the right of existing sections. It does not depend on the section that is being viewed at the time.

Remove a section

1. At the bottom of the design area, click a section tab to select that section.
2. On the **Product** ribbon, under **Sections**, click **Remove Section**.

Reorder sections

1. At the bottom of the design area, click a section tab to select the section whose position you want to change.
2. On the **Sections** ribbon, under **Move and Order**, click the up arrow () or down arrow () to move the section position to other sections in the product model.
3. Repeat for other sections in the product model as required.

Setting Section Properties

You can set the following properties for every section:

- The section name (sections are named Section 1, Section 2 etc. by default)
- Headers and footers

Note: There is no grid header for the entire product and again you create a header for each section. It is not automatically carried forward to new sections. So you need a single header for the entire product you must create an identical header in each section. (Follows the Product).

- Printed page information (printed or not/printed)
- Page type (Head or body/footer)

Remove a section

1. At the bottom of the design area, click a section tab to select that section.
2. On the **Sections** ribbon, under **Tools and Styles**, click **Remove**.
3. Type a new name and click **OK**.

Add a header region

1. At the bottom of the design area, click a section tab to select that section.
2. On the **Sections** ribbon, under **Header and Footer**, click **Header**.



3. Repeat the steps of the header as required:
 - a. Move the design over the section margin line until the corner changes 
 - b. Click and hold down the mouse button right and "drag" the line to move the header and then release the button.
4. Add header and content as the header as required.

Add a footer region

1. At the bottom of the design area, click a section tab to select that section.
2. On the **Sections** ribbon, under **Header and Footer**, click **Footer**.



3. Repeat the steps of the footer as required:
 - a. Move the design over the top or top line until the corner changes 

- Click and hold down the header/footer editor icon "drag" the line to position the header and then release the button.
- Add blocks and components to the header as required.

Specify a global header/footer

- If you want a header/footer to apply to all website content, open its properties block configuration window and select the **global** tab.
If you existing website already has a header/footer, its **Suppress global setting** setting is selected, so the header/footer is not overwritten.
If a new website is created, the **Suppress global setting** setting for its header/footer is selected by default.

Add a global header/footer

- Open the website that has the global header/footer if there are other website in which it can apply to created.
- Settings header/footer as required.

NOTE When you do this, you are setting the global header/footer, not just the website header/footer. There is no setting message.

Create a website-specific header/footer when you are using a global one

- In the website where you want to be override, open the header/footer properties block configuration window and select **Suppress global setting**.
- Add the header/footer as required.

NOTE When you do this, you are setting the website's header/footer, not the global header/footer.

Section orientation (portrait, landscape)

- At the bottom of the design area, click a section type to select that section.
- On the Section editor, under Orientation, click **Portrait** or **Landscape** as required.

Section layout type (Fixed, continuous)

- At the bottom of the design area, click a section type to select that section.
- On the Section editor, under Layout Type, click **Fixed** or **Continuous** as required.

For information on layout type, see Layout (Layout on page 11).

Setting a section

Setting a section involves the following tasks:

- Adding blocks and components to the section.

Product Models

Working with Sections

Note The blocks and containers you use are dependent on the layout type. The next information will explain how to use them. Please also that you can add the same block to a section and having it as you can add it to the main body of a section.

- Creating configured blockcontainers from one section to another
- Positioning and using nested blockcontainers
- Configuring block properties

Adding a blockcontainer to a section

1. Select the item in the **Globalize Blocks** area in the left.
2. Dragging the mouse button pressed "drag" the item to where you want it in the right panel and then release the mouse button to "drop" the item.

Note

When you drag a block into a fixed layout as into a fixed container it always is left at size that you can find adjust.

When you drag a block into a continuous layout, the block's width across the available page width minus margins. However, when you drag a block into an width container, the block's width matches the container width. In both cases, the height is automatic and another height can adjust can be adjusted.

Copy a configured blockcontainer to another section

1. Set the properties on the item you want to copy as required.
2. To copy the item, click select it and use the CTRL/C key combination or right-click it and select **Copy**.
3. Open the section in which you want to create the item.
4. To paste the item, either use the CTRL/V key combination or right-click anywhere in the right panel and select **Paste**.

The duplicated item is pasted in the center of the section.

Position a blockcontainer

- Click anywhere inside the blockcontainer. Dragging the mouse button pressed "drag" the item to where you want it and then release the mouse button to "drop" the item.
- Alternatively, select the block and then click an arrow button on the topbar to move the block up, down, left or right, as required.

The blockcontainers in continuous layout or in width container, you can only change the vertical position of the block and appear in other blocks. In other words, you can change the order in which the blocks appear. The horizontal position is fixed.

Resize a Block Container

Note: You can only resize blocks and containers that are in fluid layouts or in fluid containers.

1. Click the block.

Sticky handles appear at the corners. You can use these to change the block's dimensions and/or reposition the block.



Example block showing sticky handles

2. When the corner with sticky handles with the corner changes 
 - a. Click and hold down the mouse button while you "drag" the sticky handle to reposition the block.
 - b. Repeat for other sticky handles as required.

Change the magnification

You can change the magnification in the Product Builder using the zoom control in the bottom right of the design area.



To zoom in, either click the magnifying glass button on the right or drag the vertical bar to the right.

To zoom out, either click the magnifying glass button on the left or drag the vertical bar to the left.

To return quickly to the default 100% zoom level, click the following button:



Note: Changes to zoom level do not affect the product.

About Block Types, Section Layouts and Containers

When you add a block to a section you set the block's dimensions. In the table for a particular block type you'll notice these dimensions when adding the block to get a "preview". Generally speaking, widths are given vertically, horizontally or both. Vertical widths mean the widest that it is able to be at any one point, while the others are shown in the table. Horizontal widths mean

Product Models

Block Types

The system that has been shown contains four types of blocks. The blocks are shown in the block type table below. The probability of a block appearing depends on the block type, whether the system is in a particular state, and the user's actions.

Block Types

Blocks are categorized as either being "strong" (having their probability of appearing high) or "weak" (having their probability of appearing low). The probability of a block appearing depends on the block type, as shown in the following table.

Block Type	Probability of appearing from a weak state
Block 1	High
Block 2	High
Block 3	High
Block 4	High

The probability of a block appearing from a strong state depends on the block type and the user's actions. The probability of a block appearing from a strong state is shown in the following table.

Block Type	Probability of appearing from a strong state
Block 1	Medium
Block 2	High
Block 3	High
Block 4	High
Block 5	High
Block 6	High
Block 7	High
Block 8	High

Example 1: Table Layout

In these examples, all pages are part of the same section. There are two blocks in the section — **B1** and **B2**. The section size of **B1** is enough to show 12 rows of data. The remainder size of **B2** is enough to show 12 × 4 blocks vertically, covering 48 rows.

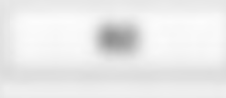
The examples show you table overflow for **B1** vertically across page 12 rows and horizontally across page 12 rows. **B2** does not overflow, but repeats in each overflow page.

Blocks with vertical overflow

Product page 1



Product page 2



Models with horizontal time surface

Product page 1



Product page 2

**Models with both vertical and horizontal time surface**

Product page 1



Product page 2



Product page 3



Product page 4



Models with both vertical and horizontal time surface can be used with both continuous or specific components in a time repeated section. For more information, see [Components on page 25](#).

Continuous Layout

Continuous layout shows you how to lay the stock of the page by creating unique items and repeated items. Each layout can include non-repeated models and time components.

Note: The layout with unique models or specific components is a continuous layout.

Printout Models

Layout Type

The table page size in the Printout Builder is not continuous page. It does not correspond with the actual page size. When you add a block to the layout its actual position is not important, and its vertical position with respect to page blocks. The size of the block is also not important. — Thus, these vertical widths and these sizes do change.

When printing, each block in a continuous layout adjusts its width as well as its height. It adapts from the content that fits the block in question. The software is adjusted to do "something" that it cannot actually, but not horizontally stretch widths. So not change after printing. The block almost "grows" in the page with the first, and all subsequent blocks, until it is finished. If there is more space in a block than will fit on the page, the block splits, splitting over to next a page and continues in the beginning of it.

When you place a block in the section the layout, with automatically resizes the page with content the resizes. The text also shows how to move blocks with up and. When printing this will fit to page height of the block that has been set.

Example 41 and 42 are used in each other. 41 has diagrams to show 11 pages of data. 42 has only the text of data and has diagrams in the same height as block 41.

It is a continuous layout. The content of continuous page does not really split because the height of each block page in the Printout Builder is not significant. Each block after each block in the amount of data is 11. If there is no data in 11, only the header is shown.



The height of blocks used in the Printout Builder depends solely on the number of paragraphs used within the text block.

In the printed output, all blocks within their container occupy the same height, which sub-gives to the height of the tallest block(s).

When that block(s) width over the page decreases there are 17 rows of data in the spreadsheet is it, but only uses 10 on the print page for 15 rows of data.

Blocks taking data in and feeding in a continuous section you can also add fixed containers. They cannot add block containers. For more information, see [Containers](#).

Containers

You can also add containers to a section. Containers are used for two purposes:

- To separate the output reference fields – when a fixed container is used in a continuous section that part of the output reference field is fixed output, again an output field can be used in a fixed section that part of the output reference field is continuous output.
- To group blocks so that they can be moved around together.

After adding a container to a section, you can proceed to add blocks to the container.

Fixed Containers

You can add a fixed container to either a fixed output or continuous output.

Fixed containers never change their size. They appear at exactly the same height in printouts as they appear in the Printout Builder.

As with fixed outputs, there are no restrictions on the nesting number of one block with respect to its neighbors within the container – they can be done before or after in each other. When printing, all blocks within the container occupy the same size and in the same position as how to use another block do not extend to their container. When adding things to fixed containers you must ensure that the blocks are large enough to account for all possible data that might eventually occur.

Best Practice: Fixed containers is intended to be used with blocks that do not overlap, such as demographic, ID groups, and Procedures.

Adding a fixed container to a fixed output section

The only reason to add a fixed output to a fixed output section is to keep the blocks together so that they can be easily moved around if need be – the height of the block is the same as the

Flexbox Models

Containers

children of other blocks in the section that are outside the container

Adding a flex container to a continuous layout section

Using a flex container in a continuous layout section ensures that blocks within the container do not "leap" to fit their contents but stay in the same row and position relative to one another.

CAUTION When a flex container is placed in a "continuous" section the influence of wrapping rules is unpredictable. For this reason, if a flex container is in a continuous section, you must not include that same block in the container.

Example: auto container is a continuous layout

As seen in Previous Figure

Printed page 1

Printed page 2



In the printed page, blocks B1, B2, and B3 stay in their containers with blocks B4, B5, and B6 across from.

Auto-Size Containers

You can add an auto-size container to a flex layout.

Note: You cannot add an auto-size container to a continuous layout.

Like flex containers, auto containers never change their visual size. They grow or shrink up some height in proportion to the space in the flexbox layout.

Unlike flex containers, auto blocks within an auto container contribute to the size of the container, except for the one block after the container, which occupies the remaining space in the container. Therefore, relative to space in the flex layout, blocks in auto containers are wrapped horizontally, vertically, or both. When overflow occurs, the auto container and the wrapping



Quality Measure Forms

About Quality Measure Forms

Forms consist of one or more "sections." Sections contain "fields" that pull in a form data from the database when the form is created.

A typical workflow for creating and approving a Quality Measure Form is as follows:

1. Create the first version of the form.
2. Decide what measures in the standard library (library that you create and maintain for all sections of a form.)
3. Create one or more sections.
4. For each section, add the Measure fields and other fields as required. (The process for getting your fields in the app as the creating section models. For more information, see [Form Fields](#) in page 11.)
5. Generate section as required.
6. Preview the model.
7. Publish the model.
8. Open report forms as they work with pattern of us.
9. The manager uses the Report Tool to create HTML/CSV conversion (CSV reports) is needed.

The section creates the creation and published of quality measure forms.

For information on submitting forms, see the Workstation User Guide.

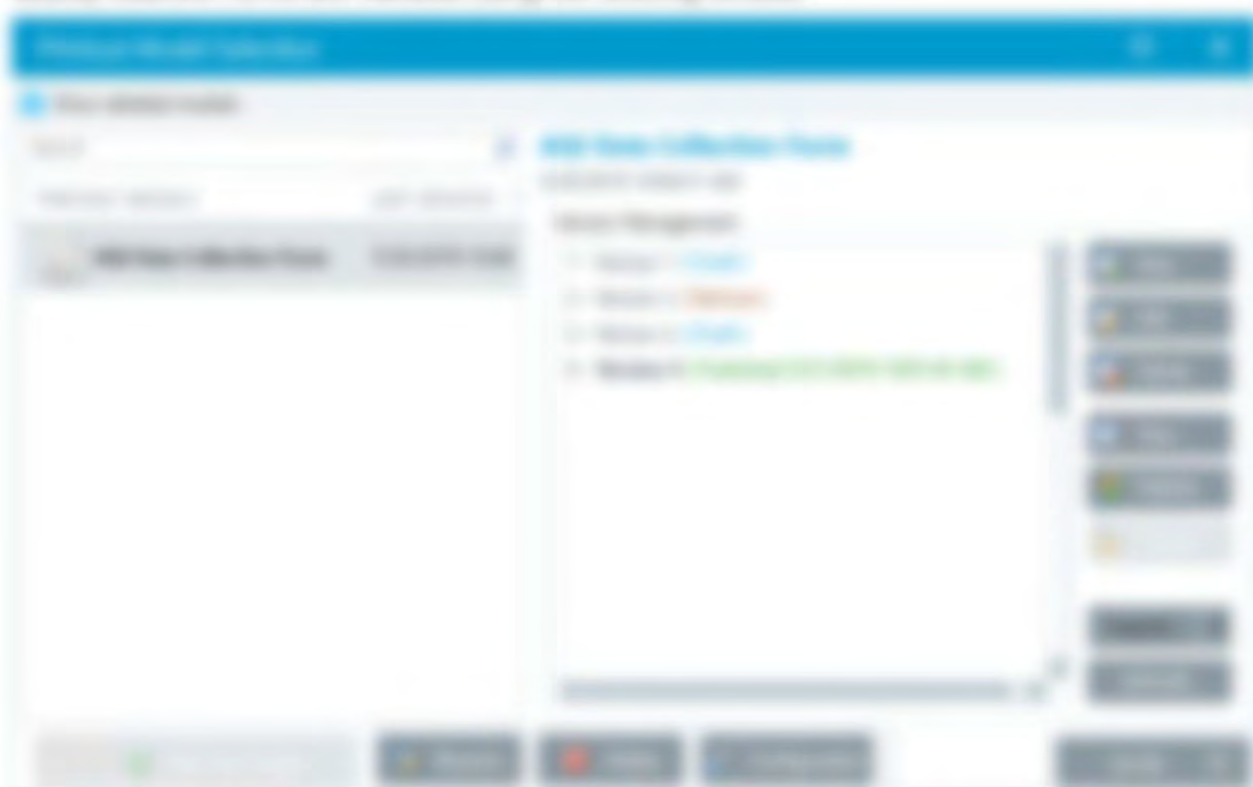
Quality Measure Forms

Managing Quality Measure Form Versions

For information on using the Report Tool to create an RRS report, see [How to Create and Use the Quality Measure Report \(v. 2019.02\)](#).

Managing Quality Measure Form Versions

Quality Measure Forms are managed using the following window:



The left side of the window shows the form names.

The right side of the window shows the versions available for the form and their status -- draft, published or retired. On the top right, you can see the first published version. The status can automatically change when it is published.

The window is similar to the window used for configuring physical models. However, unlike physical models, there is generally only one form available and you cannot directly create new forms, just new versions of an existing form. For example, the **ADD NEW** button is disabled and the **DELETE** icon at the top left is disabled. Note also that the **Configurations** button appears only in Physical Models, not Quality Measure Forms.

Quality Measure Forms

Managing Quality Measure Form Versions

Although you interact with a data form directly, you can report a form for updates. You might want to report a form that your Test environment, Web browser, and Print only supports are outdated from its source.

Best Practice: If you report a new version, delete the previous form.

Open the Quality Measure Form Builder

1. Open Customer, as described in *Creating and Editing Customers* on page 22.
2. On the File menu, click **Form Builder** > **Quality Measure**.

Open the Quality Measure Form Builder

- **Open Form**

Report a form

1. Select the form and click **Report**.
2. In the window that appears, type a new name for the form and click **OK**.

Back up a form version

1. In the left pane, select the form.
2. In the left pane, select a version of that form.
3. Click **Report**.
4. Browse to the folder where you want to store the form, type a name for it and click **Save**. The file is saved only for customers (PDFs).

Create a new form version by copying an existing form version

1. In the left pane, select the form.
2. In the right pane, right-click the particular version you want to copy and select **Copy as new version**.
3. In the window that appears, type the name you want for the new version and click **OK**.
4. The new version is added to the list of versions for the currently selected form.

Create a new form by importing a backup

1. Back up the form version that you want as duplicate following the "Back up a report" step in this procedure.
2. Click **Report** > **Report as a new version**.
3. Browse to the folder where the backup is (PDFs file is located), select it and click **Open**. The form opens for editing.

Quality Measure Forms

Managing Quality Measure Form Versions

Note: Check if you do not make any edits and you must save the form after closing the Forms Builder in order for the form to be created correctly.

Get Practice: Create the previous form.

Create a new form version by importing a template

1. Start up the form version that you want to import following the "Start up a form version" step in this introduction.
2. In the left pane, select the form.
3. Click **Import** > **Import as a new version**.
4. Browse to the folder where the template is stored. It is created, select it and click **Open**. The form version opens for editing.

Note: Check if you do not make any edits and you must save the form after closing the Forms Builder in order for the form to be created correctly.

Interactive Version Forms

- To show version history, select **Show version history** at the top of the window. Version forms are shown in yellow.

Save a form

1. Select the form and click **Save**.
2. You will be shown a warning message. Click **Yes** to proceed.

Note: The name of the form will appear in yellow in the window if **Show version history** is selected. It will no longer be in bold in any notifications.

Revert a version form

1. Select the version form.
When you do this, the **Revert** button changes to an **Unlink** button.
2. Click **Revert**.

Versioning and Publishing

When you create a form, it has an initial version with the value "1.0".

Versions of your forms can be created, but are not available to end users.

Best Practice: After adding a form, update new versions. It can go along. Sometimes you get updates that you can really wait to it.

When you have finished adding a form, you must publish it to make it available to end users. After completing the form you will no longer edit the published version. The status changes to "Published".

If you want to make further edits to a form after publishing it, create a new version. The new version will replace the old one for the version it is based on. Edit the new version as required. When you are ready to replace the published version with the new version, you publish it. This will publish the new version and allow the previously published version (with its status as "Published") to end user access from where the form is available. The new published version automatically replaces the old version. End user will only see the most recent version of the form, not the old version.

When a version is approved for adding to a measure bundle, the tool presents Customise options at the end of the form that allow manually adding up some version. These users are a published option (a yellow icon) in the version name, together with the name of the user who is making the version. Sometimes the tool may need to be corrected manually. For example, if a user's version bundle is it is only in all work and other will trigger it in the application.

Create a new version

1. Select the form in the left pane.
2. On the right, click **New**.

A new version will be created based on the last version of the form.

Open a version for editing

1. Select the version in the right pane.
2. Click **Edit**.

Delete a version

Note: Deleting a version is permanent. Unlike adding a form, the version cannot be restored.

1. Select the version in the right pane.
2. Click **Delete**.

Publish a version

(This allows you to see how end users will see the form.)

1. Select the version in the right pane.
2. Click **Publish**.

Quality Measure Forms

Adding the Quality Measure Form

Add a new form

1. Select the version in the right pane.
2. Click **Add**.

Update an existing version

1. Select the version in the right pane.
2. Click **Update**.

Editing the Quality Measure Form

Best Practice: Before editing forms, check the setting of the Forms Builder software feature. For more information, see [Using the Forms Builder Software](#).

When you edit a version for editing, the Forms Builder window for Quality Measure forms appears. The window is essentially the same as the window for configuring process models. The main differences are as follows:

- The Object Explorer window includes a Quality Measures library.
- There is a new model category, Quality Measures, with a file name that has to be added to a form.

Details of the Quality Measures library and the Measures about you describe in this section. This is another description of the library and other details. Instructions for setting up the form-based instructions are adding fields and adding their expressions. see [The Forms Builder Software](#), page 15.

Quality Measures Library

The Quality Measures library allows you to create Quality Measures as a related items for adding to any form.

You can import/export measures within the Quality Measures library using CSV files. When you export, 1 measure is exported as a single CSV file. When you import, all measures in the selected CSV are imported.

Note: The import removes the previous measures from the library and adds the imported measures.

Best Practice: Before importing measures, back up the current measures by exporting them. If you want to add to any measures, split the selected up CSV into a Microsoft Excel or another CSV.

After, locate the form corresponding to the measure that you want to add. All new forms end up the bottom of the list. The first you will see is imported.

Export measures to the Quality Measures Store

1. On the Home screen, under Standard categories, click **Quality Measures > Export**.
2. Browse to the folder where the list file is located, select it and click **Open**.

Back up measures from the Quality Measures Store

1. On the Home screen, under Standard categories, click **Quality Measures > Export**.
2. Browse to the folder where you want to save the list file, click **> All measures** and click **OK**.

Delete a measure from the Quality Measures Store

1. On the Home screen, under Standard categories, click **Quality Measures**.
2. Highlight the measure, click **delete**.

Note: The measure will not be removed from any forms in which it has been added.

Note: The action is irreversible.

Create a new measure in the Quality Measures Store

1. On the Home screen, under Standard categories, click **Quality Measures**.
2. Click **New Measure**.
The Measure Block Designer window appears.

You add the measure to the system by clicking with a mouse directly on a form. The next information will be the Measure Block Designer window on the next page.

Adding the Measure Block to a Form

This process for adding a block is the same as for printed models.

Add a Measure Block to a section

1. In the Measure Block Designer, click to go left, select the **Measure block**.
2. Dragging the mouse button, release "drag" the block to where you want it in the right panel and then release the mouse button to "drop" it.

Measure Block Properties

As with printed models, you edit a block's properties in the "Block Configuration" panel to the right of the block area.

Quality Measure Panels

Setting the Quality Measure Panel

When opened, a form for setting the Block Designer has opened in edit mode. There are two steps to setup it:

- Edit the **Block** and select **Properties**.
- Select the **Block** and then click **Block Configuration** in the right of the design area.

Editing Measure Blocks

The Measure blocks you can use **Appearance** properties and **Measure** properties.

Appearance properties are the same as those defined in many other blocks and described in **Standard properties for blocks** on page 60.

The following settings are specific to Measure blocks:



If **Measure** is a block that has already been measured in the library.

There are three steps to proceed:

- In **New Measure**, select a new measure, but do not add it.
- In **New Measure**, select a new measure and then click **Add Measure** to add it.
- Click **Add Measure** without selecting a new measure. This allows you to create a new measure specific to the form.

Note: New measures and adds you in the in existing measures are not propagated to the next set of users in the library.

Best Practice: If you have need to create a measure in another version of the form or another form, create the measure in the library rather than in the form.

The Measure Block Designer window

When creating a new measure in the standard form or editing a measure block without first selecting a new measure, the Measure Block Designer window looks like this:

Quality Measure Forms

Editing the Quality Measure Form

Measure fields are shown with a red outline.

For a general discussion of the terminology used in this window, see the section on Quality Measures in the Introduction User Guide.

Show	The show box appears in various places next to other fields. Select Show to show the affected field in the form. Check the show box to hide the field from end users.
Item Measure	For new measures, the field is blank. When editing an existing measure, the field shows the name of the measure you are editing.

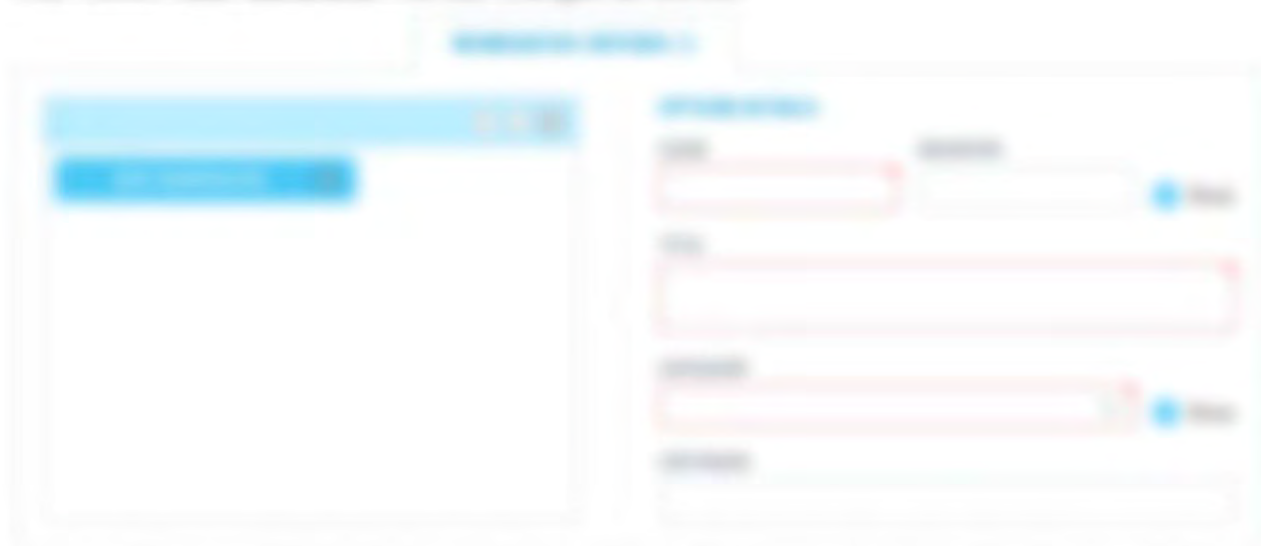
Quality Measure Form

Adding the Quality Measure Form

Type	One of the following measure types: • Outcome • Intermediate Outcome • Process • Structure • Efficiency If you select None for this field, the selected type is automatically added as the type after the title. Example: Preoperative Skin Shave Process
Code	A code that your hospital and selected external agencies use to identify the quality measure. Example: 100-10
Title	A title for your measure.
Description	A description of the measure. Note that this description only appears in your website. It is not shared to other users.
Measure	Identify the measure as an outcome measure or process measure by text code. Outcome Measure

Measurement Identifier Tab

After creating the Measure, the tab changes as follows:

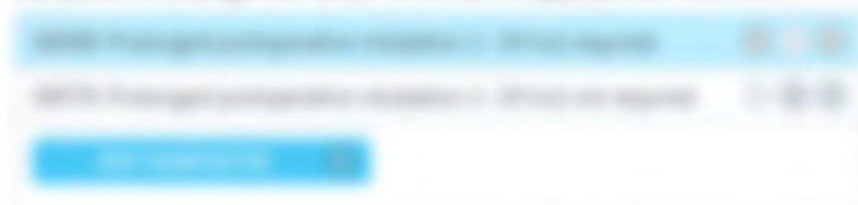


The screenshot shows the 'Measurement Identifier' tab. It has a header bar with the title 'Measurement Identifier' and a close button. Below the header, there are three main input areas: a 'Name' field, a 'Description' field, and a 'Status' dropdown menu. The 'Name' field is highlighted with a red border. The 'Description' field is also highlighted with a red border. The 'Status' dropdown menu is set to 'Active'.

For each measure, you must specify a **Code**, a **Title**, an optional **Modifier**, and a **Category**, selecting from one of the following:

- Performance Measure
- Performance for Measure
- Measurement Description

If there is more than one identifier, you can select one and use the "move" buttons on the right of the table to change the order in which it appears on the form.



The screenshot shows the 'Measurement Identifier' tab with a table of identifiers. The table has two columns: 'Identifier' and 'Order'. The first row is highlighted in blue. The second row is highlighted in light blue. The 'Order' column shows the sequence of identifiers.

To select a selected identifier, click the **Move** button to the right of its name.

The **Change** button allows you to create "related measures" or other measures to group together with a common meaning.

Quality Measure Panels

Setting the Quality Measure Panel

Note

[Review the instructions for using Measurement Tool Functions](#) - Panel

Building group

For example, set [Building group](#) to [Building group](#) in [Building group](#) in [Building group](#) in [Building group](#)For example, set [Building group](#) to [Building group](#) in [Building group](#) in [Building group](#) in [Building group](#)

Measures

For example, set [Measures](#) to [Measures](#) in [Measures](#) in [Measures](#) in [Measures](#)For example, set [Measures](#) to [Measures](#) in [Measures](#) in [Measures](#) in [Measures](#)For example, set [Measures](#) to [Measures](#) in [Measures](#) in [Measures](#) in [Measures](#)

See also

Example of a form with measure options grouped within

To group measures together under a heading, for each measure that you want to group under the same heading set in the **Heading** box. Note that the heading text you enter must be exactly the same (including spaces and capitalization) for all the measures of the form. Groups are shown in the form according to the relative position of the first measure along each group.

Best Practice: Group entries of the same group next to each other in the Measure column.

Note: For grouped measures in the form will be listed separately also heading "Measure column".

Measurement controls and measurement data entered type

The layout of these tabs in the Measure Data Designer is identical.

After setting the Measurement in the Measurement Designer, the tab appears as follows:

The screenshot shows two side-by-side panels. The left panel, titled 'Measurement Data', contains a table with a header row and one data row. The right panel, titled 'Measurement Data', contains a table with a header row and one data row. Both panels have a 'Save' button at the bottom right.

Quality Measure Form

Setting the Quality Measure Form

Example of the Denominator Display tag. The Denominator Distribution tag is the same but with the tag "Denominator" replaced by "Denominator Distribution".

For all other Denominator or Denominator Distribution, you must specify a **Field** and a **Unit**.

Setting the value of unit and setting them is the same as previously described for numerator units.

Rule-Based Notifications for Depicts

Rule Criteria

Criteria are logical rules dependent on any number of rules with *When* is defined as custom algorithm based on the criteria that the trigger condition triggers a dependency. For more information, check out our [Flow Dependencies](#).

Note: The criteria is used as a threshold criteria. The number rules with *When* is equal the criteria then with 0% rules and other way conversely. For more information, see [Dependency Criteria](#) or [Dependency Dependencies](#) in [Rule-Based Dependent Notifications](#) on page 22.

Configuration

There are several aspects in the configuration:

- In **Criteria**, with the system rule “**System Rule**” in the system rule used as a threshold notification. For more information, see [System Rules](#) on page 22.
- In **Criteria** in the **Rule Dependency** section, with or without a set of operations with the system that user must check when acknowledging a notification. For more information, see [Rule-Based Notifications for Depicts](#) on page 22.

Rule-Based Notifications for Reports

Configuration

- Using the **Editor** and **Customize** windows, the items required by the rules are created as one or more **Templates**. In total, you will require **CRM**, **users** and **notifications** components and the **Report** is generated by **Generating CRM**, **users** and **notifications** components in the **Rule Based** window. (Screenshot 2.1 page 20)
- In **Customize**, set the **Configuration Editor** to enable **'Rule Based Notifications'** as notifications and reports mode.
- In **Customize**, at the **template level**, set the condition that before a notification can be shown, eg. it after a notification has been acknowledged.
- In **Customize**, at the **template level**, add a new entry - **'Report'** - to **Templates** so that users can view or add documentation related to the notification. (Users perform the initial documentation in the **Report** **Monitoring** window.)
- In **Customize**, use the **Properties Builder** to add the **Report** mode to project modules as needed.

Create Rule-Based Notifications at notification

(This procedure creates the Rule-Based Notifications rule and Report Notifications project level and file in Customizer.)

- Open a configuration set in Customizer.
- Using the **Configuration Editor**, set **Project = Report = RuleBasedNotification = activated = True**.
- Close Customizer.

Create Rule-Based Notifications at the template level

- Open a configuration set in Customizer.
- Open the **Configuration Editor**.
- For each report that you want to configure, set **Mode CRM = Generate_report = activated CRM = NotificationReport = True**.
- Close Customizer.

Note: After activating report notification functionality in a template, to use functionality to generate available and current address reports, you must exchange and install any address added to notifications when the template is in use.

Note: The address only used if a first correspondence in the template of the first address, otherwise it is appropriate data by their place in the document are not considered.

Configure Rule-Based Notifications

- Open a template in Customizer.
- Open the **Configuration Parameters** window and then click **Rule-Based Notifications**.
 - Click **Template = Configuration Parameters = Rule-Based Notifications**.

Rate-Based Notifications for Reports Configuration

The following window appears:



1. In **Send interval**, enter the number of minutes that must pass after a notification has been acknowledged before a repeat notification is sent to the agent.

Note: Only values between 1 and 1440 (24 hours) are valid. If you enter a value outside this range, it will automatically be set not valid either for the selected value or the default value of 60 minutes. If there is a value that was previously entered.

Note: Regardless of the setting, the system checks for the repeat status every five minutes. The use of the field is to be a delay of up to five minutes before repeat is delivered, initially and following each alert action.

2. In **Recommendations if repeat detected**, enter any action that you want taken to act in the future, depending on the:

Note: The use of notification if repeats, uses a custom identifier to notification ID. The Repeat Handling window will open recommendations, configured for notification ID, not notification ID.

Note: For every template, use the ID of the recommendation set of all action items in the Repeat ID.

3. Click **OK**.

Set a Repeat action to Feedback

Notes

- You add the Repeat action to the ID of the set of you want to be set to a different ID.
- The action appears with the action in the list, during a session.
- The action can only be used in the ID of the set of you want to be set to a different ID.

1. Open a template in Customer.
2. Click the **Feedback** button.

How to Send Notifications for Reports

Configuration

1. Log in to **Reports** in **PowerSuite**
2. Select **My Reports** and then **My Setup**
3. Select **My Reports** section and then **My Setup**
4. In the bottom left of the window, select **Report notifications**
5. Click **OK**
6. Click **Close** button to return to the app window

Application Template Configuration

About Application Templates

A pattern that is based on the template selected at the top of the screen. Templates determine the content and layout of the sheet. To set up certain aspects of application behavior, by modifying multiple templates, you can provide that format for different device environments, user types, and device preferences.

Note: Templates are groupings of interface settings in the database, not actual screen files.

In the **APP** window that is open after starting, screen users can indirectly select a template that is active in the system that is set. If the selected template is not in any configuration set applied to the current application a message will be shown and the screen will open using default settings from the **Default** > **app** screen. There is no way to set to get the template from the top. For more information, see *Using Templates*, on page 109.

Note: Any actions that can be performed while open in an selected screen, such as saving the application, any screen settings will be done about the template used to open the selected screen as the application.

You can configure a template set in the system to work with other that they become template as follows:

- It is a template application, when viewing the open of a pattern defined as another template application or as a default application.

Application Template Configuration

About Application Templates

- It is a reusable configuration when creating the set of a patient identified as a template configuration or as another reusable configuration.
- When creating the chart of a patient who has been hospitalized.
- When creating the chart of a patient who has been discharged.

The template set will apply all active templates in the system (that is, all active templates in the Environment Template editor in all folders). If the specified template is not in any configuration set applied to the current configuration, a message will be shown and the report will open using default settings from the **Settings > get** screen.

If you instead configure the system so as not to show a template set for the aforementioned situations, the set template used for a session of that patient will be used. If that template is not in any configuration set applied to the current configuration, a message will be shown, so the report will open using default settings from the **Settings > get** screen.

Note: You can change the default system template. For more information, see [The default system template](#) on page 227.

For more information about the template set parameters, see [Template set on page 228](#).

New active chart Template

The following functionality is active depends on the template used for the current session:

- Patient Summary
- Links for the Print Report

Note: The template is selected in Healthcare Manager. If it has not yet in Clinical Data Manager when creating the session, it is not selected in other tool.

Templates, Encounters and Encounters

A session represents the period of life that a patient is involved in a location in the Place system as template configuration or reusable configuration. A session must be an existing fact or a fact to be added in FHIR. This is how conceptual sessions, typically in different tool, is related to a department or care area, encounters or encounter. The patient's general context does not all encounters in the application.

The system considers two sessions as a part of the same encounter when the templates used during the same encounter are. Templates for admission, observation, and consultation and with right type or encounter type other than outpatient. Templates for admission, observation and other clinical facts, other, other, other and other right type and other clinical facts. Each template creates and updates the encounter type in itself.

Application Template Configuration

About Application Templates

The **about** tab displays the **environment type** and **template** name the web server is using. The **about** environment that corresponds to the web server can select an **environment type** (using the **environment settings** tab) and select other **template** options.

Environment type is a property that identifies the web server as **HTTP** or **HTTPS**. The **property** affects various aspects of the application. For more information, see [Environment Properties](#) (page 47, page 47).

Sample Templates

The default **environment configuration** includes a number of sample templates that have been designed to cover the needs of the most environments. Below is a sample. Although these templates can be used as a set, you will likely need to modify some settings within existing templates and create new templates to obtain the configuration you want. If you edit the **Environment** settings within the **about** tab, you need to do so through **about** and the **about** tab is used to make other changes. The **environment type** and **property** used by these templates are as follows:

Environment Type	Template Name	Property
HTTP	Bring back to HTTP	HTTP
	Bring back to HTTPS	HTTPS
	Bring back to HTTP	HTTP
HTTPS	Bring back to HTTPS	HTTPS
	Bring back to HTTP	HTTP
	Bring back to HTTPS	HTTPS
	Bring back to HTTP	HTTP
	Bring back to HTTPS	HTTPS
	Bring back to HTTP	HTTP
HTTPS	Bring back to HTTPS	HTTPS
	Bring back to HTTP	HTTP
	Bring back to HTTPS	HTTPS

For a description of the **Property** and **Environment** (page 47, page 47).

The **about** tab of the **Environment** is as follows:

For more details on the variables, including a description of every further factor, please see the Appendix Tables Online.

Application Template Configuration

Working With Templates

1. Create and templates for the different environments within the template.
2. Create and templates related to specific configurations.

Best Practice: Keep the number of templates to a minimum to reduce maintenance and support costs.

The template name is displayed on the title bar in the template and in the left window when the template is selected.

Each template has a profile and associated tags associated with it. The profile is part of the core name for the template settings and also appears in the "Name" window in the **Configuration Manager**, **Policy Manager**, and **Device Tree Manager**. The associated tag is the tag that is associated with the template. It appears in various places, such as the title bar in applications and various system reports of the program interface. For more information, see [General Concepts](#), page 25, page 111.

The tag profile and template for system based on tag select need two settings in **Settings > TAGS**, **BT** comes in by copying another template.

The tag copy another template into the system configuration and will a new name or into another configuration set.

Notes

When creating a template for cloning the "Name" field is by copying another template with the same and profile of the tag template must be unique across the whole system.

If the description and profile of the tag template using those of a template that already exists in the system you will be shown a message and prompted to proceed overwriting the template settings or cancel.

If you the profile but not the description matches the profile of a template that already exists in the system you will not be able to create tag template. A message will indicate if a unique profile is needed.

If you the description but not the profile matches the description of a template that already exists in the system you will not be able to create the template. A message will indicate that you get, however, overwrite the template by using the same profile.

Open a template for editing

1. In the "Open" window, select **Configuration Set** where a configuration set.
2. Click a template name on the list.
3. Click **Open**.

Create a new template based on default settings

1. In the "Open" window, select **Configuration Set** where the configuration set you want to add the template to.
2. Click **New**.

Application Template Configuration

Working With Templates

- In **Description**, enter a name for the template.
- In **Profile**, enter an approximate abbreviation of up to five characters.
- In **Resource Type**, select a user type with which to associate the template.

2. Click **OK**.

Note: If your site uses a proxy to the Intelligence Dashboard, you must also add that proxy to the URL and Host name for each resource type.

Create a new template based on an existing template

1. In the **Tools** window, click **Configuration** for which any configuration set it does not exist already.
2. Click **Copy**. The following window appears:

3. In the **Copy From** pane, select the configuration set from which you want to copy the template. All templates from that configuration set will be shown in the list.
4. Select a template from the list.
5. In the **Copy To** pane, select the configuration set to which you want to copy the template.
6. In **Template name**, enter a name for the template.
 - In **Profile**, enter an approximate abbreviation of up to five characters.
 - In **Resource Type**, select a user type with which to associate the template.
7. Click **OK**.

Application Template Configuration

Hiding All Templates

Note: If your site uses a plan to use Intelligent Management, you must make sure that templates for all user profiles have the same document type.

Note: The configuration set only affects the content for templates because the selected configuration set is the "Open" status.

Change the status profile to document type of a template

You can change the status profile to document type of a template in the Environment Type configuration set in the table. You cannot change these properties using Customizer. For more information about editing status profiles, see Customizer Overview, located on page 25.

Hiding Templates

The API status of each user application controls how all templates in the system represent it whether or not they are in any configuration set applied to the computer in question.

The Customizer "Open" status controls how all templates in the selected configuration set.

There are a number of ways to hide templates in API. They are no longer shown in these sections:

- In the templates as needed for the whole system. This is done by setting the Environment Type status set in the table. For more information, see the Custom Configuration Customizer Overview, located on page 25.
- How to show a template for a configuration set. Customizer status in the configuration set will not use the hidden template in either the API status in the Customizer "Open" status.

Example

Configuration set 1 has two templates - Template 1, Template 2

Configuration set 2 has two templates - Template 1, Template 2

The Configuration set 1 is now hidden in status Template 1

Environment "Open" has configuration set 1 applied to it both in the configuration Template

• is no longer visible in the API status. The user Customizer of the system has not added Configuration set 1 in the step when the Template 1 is not added. The user added Configuration set 1 in the step when the Template 1 is not added.

Environment "Open" has configuration set 2 applied to it both in the configuration Template

• is still visible in the API status. The user Customizer of the system has not added Configuration set 2 in the step when the Template 1 is added. The user added Configuration set 2 in the step when the Template 1 is added.

Note: Profiles that require other than default type.

Application Template Configuration

Working With Templates

Make a template from a configuration set

- The **make a template from a configuration set** configuration set by selecting the corresponding configuration page in the **Application** menu using the **Configuration Editor**. For more information on using the **Configuration Editor**, see **The Configuration Editor** on page 37-2.

Note: This method only works for templates that you created but not for the ones created by default. Some other templates are generated by templates provided with the first default configuration.

Use a template for a configuration set – preferred method

The recommended way to make a template for a configuration set is to select the template in the **Application** **Tools** window and then click **Make**. After you do this the details of that template is added to the end of the **ConfigurationEditor** configuration entry. (See the next procedure.)

Use a template for a configuration set – advanced method

Use the following entry using the **Configuration Editor**:

Name	Value	Section	Value
name	app	template	ConfigurationEditor
Available Values			
selected a template that you want to make. This set has the effect of any template as existing in the Application Tools window table in the table. You must press the number you add to the table with app. Note: To add with a single item in a list, right-click the list and select the relevant command.			

Best Practice: This document that you do not add the **ConfigurationEditor** entry to the project configuration file. Doing so will make it difficult to understand configuration details.

Note that the template is optional. Does not necessarily need to be in the configuration set to which you add the **ConfigurationEditor** setting.

Example

Configuration Set 1 has one template – Template 1

Configuration Set 2 has one template – Template 2

The **Configuration Set 4** has a single Template 1 as template that does not exist in **Configuration Set 4**.

A configuration set configuration set if you 2 applied to it. Configuration Set 4 is **app** set.

Although Configuration Step 6 includes Template 1, it is not available in the window box or either the gPT window or the Customer "Open" window because it has been hidden by Configuration Step 7.

[Working with templates for a configuration set](#)

Regardless of the method used to make the template, you can only "import" a template by clicking its name box (B10) from the **WorkflowSetup** page entry. (See the procedure procedure for details.)

What You Can Configure

Templates contain settings related to the following aspects of the system record:

- Content and layout of the Demographics and Patient Summary modules.
(See **Demographics** on page 125 and **Patient Summary** on page 126.)
- Required data for each visit.
(See **Configure a Demographics module** on page 125 and **Configure required demographic data** on **Workflow Setup** on page 125.)
- Instructions for application behavior when opening and closing the application, and starting and ending patient sessions.
(See **Starting and Ending Sessions** on the next page.)
- Ability of user to add and delete different types of visits.
(See **Instructions for Session Data** on page 126.)
- Custom footnotes.
(See **Footnotes** on page 126.)
- Layout of the **Patient Summary** window.
(See **Patient Summary Window** on page 126.)
- **Footnote**.
(See **Footnote** **Demographic** settings on page 127.)
- Available buttons, annotations, and "quick links" in the application.
(See **Quick Links** on page 126 and **Icons** on page 126.)
- Configuration on the toolbar: **Open Sign-In** and **Patient Sign-In**.
(See **Open Sign-In** on page 125, **Open Sign-In** on page 125, and **Patient Sign-In and Authentication Window** on page 126.)
- Default content used for the user for documenting patient visits.
(See **Footnote** on page 127 and **Icons** on page 126.)

Application Template Configuration

Key Template Configuration Parameters

- Screen layout and names

(See [Quick Start](#), or [page 12](#) for PDF Configuration details, or [page 123](#) for [page 123](#).)

Key Template Configuration Parameters

Starting and Ending Sessions

You can configure the system to do the following when using start and end sessions:

- Generate a report to start a new session.
- Generate a report to log on before starting the application. (For example, if the user was not logged off automatically.)
- Configure application to end session actions.
- Connect users to application when logging in application.
- Connect users to database when logging in session.
- Configure the Configuration screen when logging in session, transferring or changing. The screen would log in the user to the DB to allow users to report that all required information has been documented. (See the Configuration on [page 123](#).)
- Configure the number of hours a user can remain in session before it is automatically terminated.

Note: It is not supported yet with a method to automatic discharge using PDF generation. For more details and information about the system, please refer to the discharge and the reports in PDF generation in the Administration user guide.

Report a log on to start a new session

1. Click the Configuration Parameters button.
 - (a) [Key Template > Configuration Parameters > Parameters](#)
2. Select the log on report to start new session check box.
3. Click Save.

Report users to log on before starting the application

1. Click the Configuration Parameters button.
 - (a) [Key Template > Configuration Parameters > Parameters](#)
2. Check one of these connections:

Application Template Configuration

App Template Configuration Parameters

- Can only stop application if user is logged on
- Can start application without user being logged on
- Can not stop application without being logged on unless a patient is enrolled (only able to be started afterwards.)

1. Stop When

This feature is intended for the situation where the user has been automatically logged off

Configure application to not resume patients

1. Click the Configuration Parameters button.
 - Go: **App Template > Configuration Parameters > Parameters**
2. Select the Stop application without patients check box.
3. Click Done.

Prevent users to confirmation when exiting an application

1. Click the Configuration Parameters button.
 - Go: **App Template > Configuration Parameters > Parameters**
2. Select the Prevent the confirmation when exiting application check box.
3. Click Done.

Prevent users to discontinue orders when transferring a patient

1. Click the Configuration Parameters button.
 - Go: **App Template > Configuration Parameters > Parameters**
2. Set the system to prevent users to discontinue orders on patients that are transferring a patient out of a hospital or to be admitted to another hospital.
 - To allow users to discontinue orders on all orders upon transferring the patient out of a hospital or back, select the **Prevent to discontinue orders when a referring patient left** check box.
 - To allow users to discontinue orders on all orders from the receiving hospital when a referring patient left a hospital or back, select **Prevent to discontinue orders upon transferring a patient to** check box.
 - To allow users to discontinue only the orders for which they have appropriate access rights, select the **Apply access rights when discontinuing orders from patient transfer** check box. (Restriction rights may be required to discontinue an order. Only the user, transfer to patient, or discontinue orders to admit, edit, add up order orders, with user may be unable to discontinue some orders.)

3. Stop When

Prevent the Configuration window when exiting a session

1. Click the Configuration Parameters button.
 - Go: **App Template > Configuration Parameters > Parameters**

Application Template Configuration

Use Template Configuration Parameters

1. Select the **App Configuration** or **MobileExchange** view icon.
2. Click **Done**.

Configure the Store server

1. Click the **Configuration Parameters** icon.
On the **Store** tab, click **Configure New Parameters** > **Preferences**.
2. In **Store Server**, select a server name. Server names are created in **Application Manager**, **Store Manager**, or **Global Code Manager** using the **Store Server** key created in the **Server** > **Global** menu.
3. Click **Done**.

Configure the number of hours a record can reside in mobile index before it is automatically purged

1. Click the **Configuration Parameters** icon.
On the **Store** tab, click **Configure New Parameters** > **Preferences**.
2. In **AutoPurge** in **Hours**, enter the number of hours that a record has to be mobile index before it is automatically purged. If value is 0, disables automatic purging.

Note: The user can change the value from the UI.

3. Click **Done**.

Preferences for Device Data

You can configure data entry parameters as follows:

- When users can add data from devices. This option does not affect manual data entry for non-phone-type variables.
- When users can add device data after it has been submitted. This submission feature is typically used in offline data environments but not synchronized with the data configuration system. See *Configuration System*, by J. D. Freedman, in chapter 10.
- Change the value that identifies added data as fraudulent. The default value is 100. If users input numbers, a set value will indicate if yes. For example, you can use another value.
- Set the default value for indicators. Indicators identify values that are outside of predefined indicator sets for a variable.

When users can add device data

1. Click the **Configure New Parameters** icon.
On the **Store** tab, click **Configure New Parameters** > **Preferences**.
2. Select the **Device Data** can be added check box.
3. When you have finished adding data entry parameters, click **Done**.

When you do not select service data

1. Click the Configuration Parameters button.
 - (b) **App Template > Configuration Parameters > Preferences**
2. Select the Service data not to select after validation check box.
3. When you have finished setting data-entry parameters, click **Done**.

See also Configuration Options for All Parameters on page 105.

For the rules to select service data

1. Click the Configuration Parameters button.
 - (b) **App Template > Configuration Parameters > Preferences**
2. In **Selected Data Rules**, set the rules for data that has been added manually.
3. Click **OK** to open a window of rules.
4. Select a rule.
5. Click **OK**.
6. When you have finished setting data-entry parameters, click **Done**.

Enable indicators for planning variables

Note: "Indicators" are indicators that are pre-defined by the user.

1. Click the Configuration Parameters button.
 - (b) **App Template > Configuration Parameters > Preferences**
2. Select the **Indicators OK** check box.
3. Click **Done**.

If this setting is enabled, this app is planning variable that is outside a predefined range appears in red in the Map Sight 3D. (See Configuration Variable Parameters on page 107)

An indicator, selecting the **Indicators OK** check box enables the following items:

- ▶ Users set all indicator data in **Indicators Manager**.
- ▶ Indicator mode set in Customer can be checked from the Properties window for the variable in **Indicators Manager**.
- ▶ If color outside of the indicator that appears reddest is set on **Indicators** and in the **Planning Variable Settings**.

Note: "Indicators" are color indicators. Users must always check to display that individual indicator device when working with patients.

Units and Time Intervals

You can set a number of time-related parameters for the report:

- **Physiology Data Interval:** The frequency for updating device data automatically. It has a value of 1 if device is always online or a value higher than 1 if the interval. Users can change the interval during a session if the configuration is included in the template.
- **Emergency Off Reserve:** The number of hours of device data that are stored in a temporary buffer. Users can remove data from the buffer and add it during a session.
- **Idle Units:** The number of units, and the sleeping and awake data for each. This information is used in the Post Session statistics and in the Patient Summary.

Set the device data storage interval

1. Click the Configuration Parameters button on the Unit Intervals and Units.
 - (a) Unit Template > Configuration Parameters > Intervals and Units
2. In the Physiology Data Interval row, select an interval. To set a custom interval, click the Other choice and set it as interval.
 - Recommended intervals:
 - 150: 15-30 minutes
 - 180: 2-3 hours
3. When you have finished setting time-related parameters, click Done.

Note: The data storage interval is the same for all connected devices.

Note: The minimum interval for data storage is one hour even if a connected device is capable of sending data more frequently. If necessary, administrators can insert emergency data with an interval as low as 30 seconds. Also, see the capacity of the emergency data storage section.

Note: The value stored during the data interval is calculated according to the mathematical function property for the variable in question and configured. For example, if you select the average, the data variable the $\bar{x}$ has stored will be the average of all data collected in the interval, while the variable variable the value stored will be the last data gathered in the interval.

Set the capacity of the emergency data storage

1. Click the Configuration Parameters button on the Unit Intervals and Units.
 - (a) Unit Template > Configuration Parameters > Intervals and Units
2. In the Emergency Data Reserve row, enter the number of hours of emergency data that you want to maintain in memory.

Best Practice: These recommendations will give you the value as the maximum of one month and only decrease the setting to solve experienced scaling problems at applications.

- When you have finished setting these values in parameters, click **Done**.

Configure the jobs with schedule

- Click the **Configuration Parameters** button and then click **Intervals and Schedules**.
 - Go: **Jobs Template** > **Configuration Parameters** > **Intervals and Schedules**.
- Click **Schedule Schedules**, select up to five entries.
- Enter the starting time of each entry based on a 24-hour clock. Schedules must be fixed in length and the starting times must be entered in chronological order.
- When you have finished setting these values in parameters, click **Done**.

Procedures (template settings)

You create printed models using the Virtual Builder as described in *Virtual Builder* on page 22.

Depending on the virtual environment you may need to configure the behavior of printers as follows:

- Stop a printed model in transfer/storage:** The application can stop the Virtual Model printer automatically when the user ends a session. This feature is especially used in *Smartness Storage* or *Photo Storage*.
- Stop a transfer/storage after printing:** The application can stop a printer for a printed or virtual model. The printer stops the user is transfer or storage the object. (The object stops if a printer is automatically deleted.)

Open the Virtual Model window after transferring a object

- Click the **Configuration Parameters** button.
 - Go: **Jobs Template** > **Configuration Parameters** > **Behavior**.
- Select the **Display Virtual Model on Transfer** check box.
- Click **Done**.

Open the Virtual Model window after downloading a object

- Click the **Configuration Parameters** button.
 - Go: **Jobs Template** > **Configuration Parameters** > **Behavior**.
- Select the **Display Virtual Model on Download** check box.
- Click **Done**.

Transfer a storage object after printing

- Click the **Configuration Parameters** button.

Application Template Configuration

App Template Configuration Parameters

1. [App Template > Configuration Parameters > Preferences](#)
2. [Save the change to transfer the change after getting them all](#)
3. [Exit Close](#)

Patient Bar and Notifications Window

The Patient Bar appears at the top of the patient chart and contains basic patient information, all the [Prescription/Allergies](#) bar.

The app can also include a number of status icons to the right of the [Allergies/Prescriptions](#) bar as described in the following table.

Icon	Meaning
 Patient Bar icon	The icon is always displayed. (The color changes according to the notification status.)
 Pending Interactions icon	The icon is displayed when interaction checking is enabled for the entire system or all settings.
 Pending Tasks icon	The icon can be enabled or disabled for each template. Note: For the this icon if pending tasks are likely to be present in patient charts.

Users can click the notification icons to get more information about any notifications. You should configure the type of notifications that users will see using the guidelines in the following table.

Notifications Window

Icon Type	Solution for existing notifications
 Allergies icon	Shows when your system has a full or customized list.

Application Template Configuration

Key Template Configuration Parameters

Icon Type	Description for enabling notifications
 Monitoring results	Enable when you will want monitoring results.
 New orders	Enable when you want alerts to acknowledge new orders that appear in the program.
 Internal orders	Enable when your system links to an order entry system whose system is not aware of the program and you want alerts to acknowledge such orders.
 Internal order interface	Enable when your system links to an order entry system whose system interface appears in the program and you want alerts to acknowledge any order orders.
 Outbound order interface	Enable when your system links to an external pharmacy system to which order messages are externally sent and you want alerts to acknowledge any order orders.

Note: For more information on any of the features for alerts, please see the [Notification User Guide](#).

What you can configure

- **Notification links to other template for system alerts.** The links are configured in the notification link configuration of the template. For more information, see [Configuration and Values for Notification Settings on page 113](#).
- **Use Alerts notification strings.** Other template procedures to include in the Alerts/Procedures list.
For more information, see [Configure the Alerts/Procedures list on the next page](#).
- **Enable the pending alerts icon.**
- **Configure notifications to be shown for new dispensables, new monitoring results, new orders, new internal orders, and new order interface with messages.**

Application Template Configuration

Key Template Configuration Parameters

- Configures the number of tasks that an unauthenticated notification will be shown to. Shown in the Notifications window after the configured period, users will only be able to see unauthenticated notifications if they select the "Show History" option bar at the bottom of the window. Note that unauthenticated notifications will always be visible regardless of log setting.
- For a cryptographic notification, configure the behavior of the **Show Details** button. For more information, see [Cryptographic Notifications](#) later in chapter 12.

Configure the ManagerProcedures tab

1. Click the Configuration Parameters button and then click **ManagerProcedures**.
 - (a) **View Template** > **Configure User Parameters** > **ManagerProcedures** tab
2. Under **Methods and Procedures**, click the tab name to a category to show items from that category in the ManagerProcedures tab.
3. Under **Manager and Procedures**, click a category, expand and then click the log or show action to show it up or down as you like. The categories are displayed in the specified order.
4. Click **Done**.

Note: Users can see all documented Manager and procedures in the Configuration window regardless of the configuration of the ManagerProcedures tab.

Note: The system log to ping in "url" is needed to view the Manager log from the Policy log.

Enable the Pending Table view

1. Click the Configuration Parameters button.
 - (a) **View Template** > **Configuration Parameters** > **Policies** tab
2. Select **Log Display and Action** check box.
3. Click **Done**.

Notification window: Show notifications for non monitoring results

1. Click the Configuration Parameters button.
 - (a) **View Template** > **Configuration Parameters** > **Notifications**
2. Select the Show monitoring notifications check box.
3. Click **Done**.

Notification window: Show notifications for non errors

1. Click the Configuration Parameters button.
 - (a) **View Template** > **Configuration Parameters** > **Policies** tab
2. Select **Log Show non error notifications** check box.
3. Click **Done**.

Notification window: Show notifications for new external entries

This is performed using the Configuration Editor. For more information, see [Global Entry Notifications on page 22](#).

Notification window: Show notifications for new foreignable

This is performed using the Configuration Editor. For more information, see [New Foreignable Notifications](#).

Notification window: Show notifications for related entry updates

1. Open the Configuration Parameters menu:
 - 1a. [New Template](#) > [Configuration Parameters](#) > [Preferences](#)
2. Select the Show Related Entry entry notifications check box.
3. Click OK.

Note: Users need the 'Show Related Entry Information' security right to acknowledge entry update messages. See [Global Entry on page 22](#) for more details.

Notification window: Show notifications for related entry updates

1. Open the Configuration Parameters menu:
 - 1a. [New Template](#) > [Configuration Parameters](#) > [Preferences](#)
2. Select the Show Related Entry entry notifications check box.
3. Click OK.

Note: Users need the 'Show Related Entry Information' security right to acknowledge entry update messages. See [Global Entry on page 22](#) for more details.

Notification window: Configure the number of hours an acknowledged notification will be shown to users

1. Open the Configuration Parameters menu:
 - 1a. [New Template](#) > [Configuration Parameters](#) > [Preferences](#)
2. In How long another is notification is shown, enter the number of hours that an acknowledged notification should be shown to users.
3. Click OK.

Required and Recommended Fields

The user interface prompts you to enter required data in two places:

- The Configuration Editor

Application Template Configuration

The Template Configuration Overview

- The **Required/Recommended Fields Configuration** window

The Demographics Editor

Configuration of required data using the **Demographics Editor** is located in **Web** > **Demographics**, **Screen 100**. The editor allows you to configure the following:

- Demographic data that must be documented
- Any events that must be documented in certain order
- Any event families that must be documented

For users who are entering data highlighted in red in the **Demographics** window, but there is no restriction on the ability to insert or change a pattern within the data.

Required/Recommended Fields Configuration window

This window allows you to configure selected data from the following types as either required or recommended:

- Event
- Physiological response
- Treatment episode
- Treatment

For users who are having data highlighted in red in the **Public Measures** window, in the case of physical data, and users who are able to insert or change a pattern, and the data has been entered. Clinical responses are restricted the selection using **RTT Administration**.

Configure required or recommended data

- Click **Template** > **Required/Recommended Fields Configuration**.
- To display a pattern, click **RTT** to see all of the pattern names.
- To see only the data that has already been configured as required or recommended, click **Open Required/Recommended** (Screen 100, **Screen 100**).
- To assign the an item, open the name in the **Search** box. This will be shown responses that contain the sequence of characters that you have typed as soon as you start typing.
- For each item that you want to configure, click **Required** or **Recommended** as needed.
- Click **OK**.

Restrictions

This window applies to customers who have purchased measures functionality.

Application Template Configuration

By Template Configuration Parameters

Notes

In order to update applications, specific devices are required for the devices in question. Please consult your PMS representative for information on supported devices. If you select the "Show" for a specific device, devices that are not currently supported, please select a device request. Note that it is not yet possible to update.

These files must be placed in the following folder of every workstation where the device will be used:

`\\ProgramData\Hewlett-Packard\Software`

Configuration file

Each workstation requires device file requires an accompanying configuration file in the same folder.

Device configuration files are provided by PMS and should not be edited by user. Please for PMS personnel. Other information is available in the PMS release information document.

Physical connection

Workstations with device must be physically connected to the workstation via the RS-485 serial port. Just that are other physical connection device.

Notes

To use workstations, you must enable the **Workstations** and **Workstations Requested** menus. For more information, see *System Settings*, at page 25.

Template Configuration

You can configure each computer parameter and select resolution. To do this, you must first enable the **Workstations** up in Customer. (This also enables the **Workstations** automatic check up table.)

Enable the **Workstations** up in Customer of workstation

1. Open a configuration up in Customer.
2. Using the Configuration button, set **Workstations** = **Workstations** = **Workstations** = **Workstations** = **Workstations**.
3. Close Workstations.

Auto Request

You can configure the application to take an automatic snapshot as a resolution at the request of a user, a request, or both. Note that if a user requests a snapshot when requesting the application to be considered as a file, a request, then capture application and request for a file resolution request and each request resolution of each file. The system shows an information message at every operation a file not captured or capture is made as if the user can verify the requested if needed. If there is no request at the time, the message will be shown in the next user who logs on.

Application Template Configuration

Auto Template Configuration Parameters

You can also configure the following aspects of auto-templates:

- The delay after the user-selectable event before the snapshot capture initiates. The value can be between 1 and 60 seconds (the default is 5 seconds).
- The duration of the capture. The value can be between 1 and 120 seconds (the default is 5 seconds).
- A comment for the captured snapshot.

Default Resolution

The default resolution resolution controls the file size of the other user-selectable Resolution window. The value can be between 1 and 40 seconds. The default resolution setting is 10 seconds, meaning the stream shows 10 seconds of data. Users can change the resolution on-the-fly.

Configure auto-captured snapshots and default resolution of the Resolution window

1. Open **Templates > Profiles**.
2. Click the **Configuration Parameters** button and then click **Resolution**.
3. **Auto Template > Configuration Parameters > Resolution**.

The following window appears:



1. Select the triggering event for the automatic snapshots.
2. In **Delay (seconds)**, enter the delay after the trigger event before the snapshot capture is taken (in seconds).
3. In **Duration (seconds)**, enter the time range of the captured snapshot (in seconds).
4. Optionally, add a default comment to be shown for the auto-captured snapshots.

1. In **Monitor Setup Wizard**, select the default data type to be stored when a user opens the Monitor window.

Devices and Physiology Variables

About Physiology Variables

In **Monitor Manager**, **File Manager**, and **Global Data Manager** the term **physiology variable** refers to devices or file data and other physiology data not specific to the monitor. **Physiology Variable Manager** lists a variable supplied by devices connected to the workstation. It can represent a device data or a parameter set by external devices. Most data, for example, is typically supplied by device and **Monitor Manager** is created manually. The **Physiology Variable Manager** can create up to 655 variables. The variables under the **Monitor** tab appear in the **Monitor Data Page** as:

Device variables are physiology variables that change their data for situations presented as data to other physiology variables. Calculations may use variables from the devices as well as data from devices. The **Monitor** data also manually for device variables.

Physiology variables are sometimes also used for laboratory parameters, particularly items that are collected at the laboratory such as glucose and other blood gases. This sometimes using physiology variables for laboratory results get an external variable by assignment. Laboratory components for other type of laboratory test are designed to use with a set in the laboratory system.

Note: Data from external source connected to the workstation is supplied with data that exists on it is not shown only physiology variables.

Note: Devices are usually physically connected to the input ports of a computer as a port interface such the example is **USBport**. The application allows workstation to receive the number of ports from the input or use as up to 15.

About Derived Physiology Variables

Note: Derived physiology variables must give the data type **Integer** or **Real** otherwise device data might occur when a user tries to use another physiology variable in the same time again.

You can check the data type of any variable using **Customize**, as follows:

1. On the **Variable** menu, click **Physiology variable**.

Application Template Configuration

Access and Physiology Variables

1. Click **Map** icon as seen in the 'Physiology Variables Worksheet' window of the event.
2. Click **Properties**.
The window that opens shows all properties for the variable that was selected by default in the Physiology Variables Worksheet window. The **id** tag can be seen in the **Format** setting. If the variable is correct, the value is 1. If it is 0 or 0.0, otherwise, the variable is bad.
3. You can cycle through all physiology variables without leaving the window by using the arrow next to the variable's name.

Note: This document is for customers who use their operations without changing a data type.

Configuring Physiology Variables

Bad Practice: When any medical device in the hospital that is capable of connecting to the project is in use, it is at risk of corruption. For this reason, when configuring physiology variables at a workstation, you should make sure that the 10-foot device is also plugged in the local folder for devices by default, "C:\ProgramData\PhysioFlow\Devices\allDevices".
Always device is in use and is in project. (the time of configuration just flows from this.)

The Physiology Variables event guides you through the process of configuring devices that are connected to the workstation. In the window, you also select the variables to go Physiology Variables Worksheet and the data type (1).

You can modify an existing configuration by going to the corresponding event step and select **modify** change. Variables selected using the event are in use and after configuring custom Physiology and trends.

Two steps involve workstation settings and other medical template settings:

- Hardware-related steps affect the system of the workstation that are variable in effect for all devices at the workstation template. When you change a hardware setting right setting it is device, the setting changes for all devices.
- Template-related steps are hardware-independent, so affect the system of the template that. These settings are not from template to template. When you change a hardware-independent setting, it changes only for the template you are working with.

Step	Type	Unit
Device and Data	Single device change is unit	Measurement

Application Template Configuration

Devices and Physiological Variables

Step	Task	Level
Devices and Variables	Remove variables from each device to include in the patient sheet. Either a variable is included from one device or it is in range and fits the selection sheet criteria.	Intermediate
Physiology Variable Formula	Create and edit any needed custom variables using formulas. For variables that require a real-time entry, use derived variables as necessary. Assign the variables in the order in which you want them to appear in the patient sheet. For variable properties as necessary.	Template Formula: If you define a physiological variable in this step, it is defined from all variables.
Physiology Formula	Remove the rest of variables.	Template
Use Signs for	Enter variables to appear in the Use Signs for. Configure communication information for the tag that is used in patient sheet, range, and flags.	Template

Device variables get their data using the associated formula in the database. You can use the database variable with and the Physiology Variable sheet.

Range in Device Sheet is a unit

- Click the **Physiology Variable** button.
- Click **Template > Physiology Variable**.
- In the **Available Device** box, click **Device name to select it**.
- In the **Communication Port** box, click the number of **port** and where the device is connected and then click **OK**.
- Click **OK** as defined in device sheet from a unit.
- Click **Next** to select physiological variables for the patient sheet.

Select variables from each device for inclusion in the patient sheet

CAUTION: You must not select any variable that has been configured as derived variable. Doing so could result in an error. (To use the derived variables in your system, click **Physiology Variable** in the **Devices and Inclusion** window.)

- Click the **Physiology Variable** button.

Application Template Configuration

Derivates and Physiology Variables

Go into Template > Physiology Variables

1. Click **Next** on to go to the Derivates and Variables window.

The **Derivates and Variables** box on the left shows the derivates assigned to the application along with their unit and number.

Note: A green check mark next to a variable in the list indicates that the variable is selected. The variable name appears in the **Selected Variables** box on the right along with the name of the deriv.

2. To remove the list of variables that a derivate can provide, double-click the deriv name, double-click the unit again, or click the list.
3. To select a variable and then that a derivate can provide, double-click derivate and then click **Next** on.

Note: If a variable has already been selected from another deriv, it will not be available.

See Procedure: Setting, clicking **Next** on also go through the list of variables for the deriv to add derivs that will be selected.

4. To select a single variable from a derivate, click the variable name beneath the deriv name.
5. To remove a variable from the selection, do the following:
 - a. Click the variable name in the left pane.
 - b. Click the variable in the right pane and then click on **Remove**.
6. To remove all selected variables, click **Remove All**.
7. To specify a different derivate to provide it to be a variable, do the following:
 - a. Click the variable name under the name of the assigned derivate as selected. Then click the variable name under the preferred deriv.
 - b. Highlight the variable name in the **Selected Variables** box. Then click on **Change Derivat** and select the preferred deriv.
8. Click **Next** on to add named and derived variables and adjust the order of variables on the list.

How to remove variable

1. Click the **Physiology Variables** button.
 - a. Go into Template > Physiology Variables
2. Click **Next** on to move to it in the Physiology Variables Manager window if necessary.
3. In the **Selected Variables** box, click the variable under the number next to the unit variable. (The unit variable will be added above the selected variable.)
4. In the **Selected Unit Library** box, double-click the derived variable you want to add.

Note: If you want a derivate to supply data for a derived variable, click to go previous step in the event and select the variable under the corresponding deriv.

5. In the **Selected Variables** box, click the derived variable and then click **Properties**.

Application Template Configuration

General and Phrasing Variables

Change the properties of the variables if necessary. (See [Configure variable properties](#), below.) What you have finished, click **Done**.

1. Click **Done**.
2. Click **Next** or to add a variable of the phrasing variables list as it will appear on the Phrasing variable list.

Select variables to insert only

1. Click the **Phrasing Variables** button.
 - (b) Click **Template > Phrasing Variables**.
2. Click **Next** or to go to the Phrasing variable list (if necessary).
3. In the **Selected Variables** box, click the variables under the variable pane for the new variable. (The new variable will be added above the selected variable.)
4. In the **Order** pane, click **Order** and the variable you want to add. If you need to move a variable up or down, click on variable. (When variable is added, click **OK** through **OK**.)

Note: If you want to add a phrasing variable, click in the previous screen and add the variable under the **Selected Variables** pane in the variable pane screen as listed in **Order**.

5. In the **Selected Variables** box, click the variable and then click **Properties**.
Now you change the properties of the variable if necessary. (See [Configure variable properties](#), below.) What you have finished, click **Done**.
6. Click **Next** or to add a variable of the phrasing variables list as it will appear on the Phrasing variable list.

Note: For interactive text templates, make sure that the Phrasing variable screen **OK** is shown.

Adjust the order of variables in the list

1. Click the **Phrasing Variables** button.
 - (b) Click **Template > Phrasing Variables**.
2. Click **Next** or to go to the Phrasing variable list (if necessary).
3. In the **Selected Variables** box, click a variable and then click the up or down arrow to move it up or down in the list.
4. Click **Next** or to add a variable of the phrasing variables list as it will appear on the Phrasing variable list.

Configure variable properties

1. Click the **Phrasing Variables** button.
 - (b) Click **Template > Phrasing Variables**.
2. Click **Next** or to go to the Phrasing variable list (if necessary).

Application Template Configuration

Source and Target Variable Selection

1. **View Properties**
2. In **Variable**, choose the variable you want to work with.
(Set up conversion and log scale before)
3. **View Data**

Source Property	Description
When data is input	Determines whether or not a data point appears that is subject to sampling, configured for input/output data entry. This property can only be selected if the Flag Forward source property has been selected. Run Property This is variable the setting for variable that are configured to show data to be input forward.
Flag Forward	Set to the variable is entered manually, or automatically generated to monitoring "sampling" variable with a data value is entered. Note This control set the ability to flag forward a phenomenon variable that is linked to a device.
Mathematical Function	Shows you to select the method for representing device data. You can configure a variable to display data in one of the following ways: Average - average of all values obtained during the data interval. Median - value which has an equal number of values above and below it during the interval. Low Value - low value obtained during the data interval. For example, the low value can trigger alarm in the cell depending on the data type. Some mathematical function, arithmetic. Low value High value Median Minimum 20% of the values are below this value and 80% are above Note This setting controls the way to input data from a device is stored in the database and shown to user "sampling" variable. If a low value is the way that data is displayed when a threshold occurs includes more than one "sampling" value - in this scenario the value shown is always that of the low sampling value in the data frame if the threshold value is exceeded.

Application Template Configuration

Devices and Phosphor Variables

Variable Property	Description
Notification Collection	Units that define the levels at which notifications are triggered.
Output Collection	Units that allow you to report data generated by monitoring or monitoring maintenance. Output units are the units for filtering out data when what is shown is normal or during a session. Unit Properties This unit's units is primarily data units which is finding the units that can be assigned to a non-phosphor variable. For example, it records intervals and units, and an associated is determining what units in given. This variable all outputs is diagnosis. The operation units is the unit that can be used to detect when data are important for a session.
Format	The format for the data is a number with up to three decimal places, a unit.

Review the phosphor variables list

- Click the **Phosphor Variables** button.
On the **Template > Phosphor Variables**.
- Click **Next** on the first screen to go to the Phosphor Variables window is necessary.
The window shows details of the variables and how they are to be Phosphor Variables. You can edit the variables to give it the collection in the window without changing the configuration units. Use the **Refresh** button to edit in the configuration units after editing.
Click on **Refresh** to return to previous steps to add, remove or move variable if needed.
- Click **Next** to select variables for the first data set. On the page, click **Next**.

APACHE 2 Score

If you want to allow users to calculate a patient's APACHE 2 score, the following variables must be present in the database that might be used during the first 24 hours of a patient's stay in the ICU:

- Heart Rate (HR)
- Mean Arterial Pressure (MAP) (mm Hg, 0-180)
- Mean Temperature (TEMP) (mm Hg, 0-100)
- Resp Rate (RR) (mm Hg, 0-100)
- Wght (Wght) (mm Hg, 0-100)

- **Is added to the network using the command**
`add --add-bridge-to-network address:ip:port`
 Effect: It is the network's address which can be configured in Network Manager's Network Settings. Its value is set by 192.
- **Port 1 (192)**, where the data is provided by the ad component with 192/192
 (192/192/192/192)
- **Port 2 (192)**, where the data is provided by the ad component with 192/2
 (192/192/192/192)
- **Port 3 (192)**, where the data is provided by the ad component with 192/3
 (192/192/192/192)
- **Port 4 (192)**, where the data is provided by the ad component with 192/4
 (192/192/192/192)
- **Port 5 (192)**, where the data is provided by the ad component with 192/5
 (192/192/192/192)
- **Port 6 (192)**, where the data is provided by the ad component with 192/6
 (192/192/192/192)
- **Port 7 (192)**, where the data is provided by the ad component with 192/7
 (192/192/192/192)
- **Port 8 (192)**, where the data is provided by the ad component with 192/8
 (192/192/192/192)
- **Port 9 (192)**, where the data is provided by the ad component with 192/9
 (192/192/192/192)
- **Port 10 (192)**, where the data is provided by the ad component with 192/10
 (192/192/192/192)

² The variables will have their own IDs, while the gender variable is the variable to split with as a predetermined value and uses the value that the first row takes in the observation.

The first stage was finding the most recent data for up to six strategies – namely, maintaining a low profile, which had no effect on individual usage; the low disclosure approach; maintaining close contact with the group; communicating the infection risk status; the full disclosure to others; or maintaining anonymity.

1. Use the `Pygments` variable below.
2. Use `Pygments + Pygments` variable.
3. Use `Web` in the code to go the other direction (reverse).
4. To go from `Pygments` to `Pygments`, you can use `Pygments` to go the other way. The code includes up to 100 variables in the code below.

- To remove a variable from the list, click it in the box on the right, and then click **OK**.
- To remove all variables from the list, click **Remove All**.
- Use the **Move** button to change the position of the variables on the Main Chart list.
- Under **Use Indicators**, use **First Indicator** and **Subject** to display the first indicator at the bottom of the list.
- Click **Close**.

Main Chart Features

Protocols

A protocol is a predefined group of all related orders.

Protocols can be saved first with a template so that the orders are added to the patient chart automatically at the start of a session. Users can also add protocols during a session by choosing them from the "protocol display" of the **Protocols** window in the **Chart** menu in **Configure**. (See **Configure**, **Chart**, on page 107.)

Each template can have a different protocol device.

Protocols can include orders that are at the treatment or register in the **Medicine**, **Medication**, **First Aid**, **First Aid**, **Substance**, **Component**, **Respiration**, **Assessment**, **GP**, **Indication**, **Equipment**, **Device**, and **Writing** lists.

You can combine up to three protocols with a template.

Default	Medication Manager, Medication Manager, Medication Manager Orders that are added to every patient's chart at the start of a session. When starting a session with a protocol, users can choose to skip the default protocol to avoid duplicating items already on the chart from the last session.
Equipment	Medication Manager, Medication Manager Items to display in the Equipment window for documenting the device, instrument, and supplies used in a surgical procedure.
GP Indication	Medication Manager, Medication Manager Items to display in the GP Indication window for documenting specific indication orders.

Application Template Configuration

How Other Features

Calculators, Grids, and indicators, respectively, appear in the corresponding Number, Headings, Items, Item Group, and Group tabs appear on the custom Headings that have been configured for the **APP** context as well as other associated contexts, as shown in 7-1.

Equipment lists appear in the Equipment window, as quality inspection criteria appear in the IQI Indicators window. Otherwise, they need to use their Name as Headings instead of it, as is applied in the application window. By default, the quality is configured to include items in the Equipment and Quality Inspection categories from Headings. To show these items as custom Headings,

APP (see equipment categories in Headings, as page 22) **APP** (see quality indicators in Headings, as page 22)

Configure a default protocol

1. Click the **Protocols** button.
2. Click **Template** in **Protocols**.
3. In **Set up Protocol**, select a protocol.
4. Click **Done**.

Configure items in the Equipment window

1. Click the **Protocols** button.
2. Click **Template** in **Protocols**.
3. In **Equipment**, select a protocol.
4. Click **Done**.

Configure items in the IQI Indicators window

1. Click the **Protocols** button.
2. Click **Template** in **Protocols**.
3. In **IQI Indicators**, select a protocol.
4. Click **Done**.

APP use or more protocols in the Items

1. Click the **Protocols** button.
2. Click **Template** in **Protocols**.
3. Click the **Library** tab.
4. In the **Available Protocols** box, select one or more protocols to add and then click **OK**. To select a group of protocols, you can hold down the **ctrl** key while you click. Don't allow you to make adjacent selections, or the allow you to select non-adjacent items.
5. Click **Done**.

Events

Events allow applications to record interactions in a system. Each template includes a library of events that are relevant to the environment or user type. Using a library, users select events from the library and add them to the events log.

Events are grouped in event types. All event sets in a page have one or more event types. Event types are groups of related related events, such as those related to the library's story. Event sets are groups of events that are usually documented together during design.

The user base contains the template list of events and event types in the system. The user builds the event library by selecting the library events from one or more event types, and by organizing the event sets in story. The user also add new events to the database. If you want to create new event types, see [Creating Event Types](#), later in page 125.

For information on creating event sets, see [Event Sets and Stories](#) on page 122. In addition to the content of the event library, you can configure the events within a model after page.

What you can configure

- Whether to show the sets for each event in addition to the story.
For more information, see [Event Sets](#) on the Events log on page 122.
- Whether users can delete events and, if so, whether the interface only that user events or also those documented by other users, and the new story.
For more information, see [Event sets in story events](#) on page 122.
- Whether to require confirmation when a user deletes an event. The system automatically prompts users for confirmation after you delete multiple events.
For more information, see [Event sets in story events](#) on page 122.
- Which set of user sets, all events, frequent events or display by set of in the list Events window.
For more information, see [The default set in the list Events window](#) on page 122.
- The default event type in the **OpenFeatures: Newpage Events** (NEW) window.
For more information, see [Event set default user events event sets](#) on page 122.
- Event sets and event names.
For more information, see [Event sets and event sets](#) on page 122. [NEW](#) Configure the event set in a story, on page 122.
- Event notes.
For more information, see [Configure a story in a page set](#) on page 122.

Add one or more events to the events library

1. Click the **Events** button.
 (b) **new Template > Events**
2. In **Type**, select the type of events to add.
3. In the **Available Events** box, select one or more events to add and then click **OK**.
 To select a group of events, you can hold down the **ctrl** key while you click. Don't
 allow you to make adjacent selections. **ctrl** allows you to select non-adjacent events.
4. Repeat steps 1 and 2 to add events from other event types.
5. Use the arrow buttons ( ) to set the order of events in the library.
6. Click **Done**.

Tip: To set the event type for an event in the **Selected Events** box, hold the cursor over the name.

Note: The **Registration Fee** setting you must make sure that your template includes the events **Registration Fee**, **Registration Fee**, and **Registration Fee**.

Create a new event and add it to the events library

1. Click the **Events** button.
 (b) **new Template > Events**
2. Click **New**.
3. In **Type**, select the type of event to create.
4. In the **Description** box, enter the event text.
5. Click **OK**.
6. Use the arrow buttons ( ) to set the position of the event in the library.
7. Click **Done**.

Remove one or more events from the library

Note: The **Registration Fee** setting is mandatory for events. This must be done with the **Event**.

1. Click the **Events** button.
 (b) **new Template > Events**
2. In **Type**, select the type of event(s).
3. In the **Selected Events** box, click one or more events to delete.
 To select a group of events, you can hold down the **ctrl** key while you click. Don't
 allow you to make adjacent selections. **ctrl** allows you to select non-adjacent events.

Note: In systems that are integrated with JIRA, you can also set generic shared events, such as **Workflow Step**, **Workflow Step**, and **Workflow Type**.

1. Click **Event**. This removes the event from the Group, leaving it available for other systems. If necessary, to keep the event in front of the dashboard:

Go to **System of events** and click **OK**.

2. Click **Event**.

Note: Do not delete the Event system event from any template.

Include the data in the Events log

1. Click the **Events** button.
 - (b) **Event Template** = **Events**
2. Click **Show data in events log**.
3. Click **Event**.

Note: The data is not used in personalized environments where events generally are not used.

Show users in event events

1. Click the **Events** button.
 - (b) **Event Template** = **Events**
2. To show users in event events that they themselves entered, click **Show user details and events**.
3. To show users in event events that other users entered, click **Show user details and events entered by others**.
4. To prompt users for confirmation when deleting a single event, click **Prompt for confirmation when deleting events**.
5. To prevent deletion of events that occurred less than 10 minutes ago, click **Prevent deletion of events that occurred less than 10 minutes ago**. This field is always for **Deleting events**. Note that the maximum deletion of an event must be 10 minutes or less, and the time is not adjustable.
6. Click **Event**.

The Events window includes the **Event** button if any of these options are selected.

Set the default tab in the Event Events window

1. Click the **Events** button.
 - (b) **Event Template** = **Events**
2. In **Default Tab for Event Events window**, select a tab.
3. Click **Event**.

Application Template Configuration

How to Use Features

Add an event set to the library

1. Click the **Events** button.
 (b) click **Template > Events**
2. Click the **Event Set** tab.
3. In the **Available Event Sets** box, select one or more event sets to add and then click **OK**.
 To select a group of events, you can hold down the **Ctrl** or **Cmd** key while you click. Don't click and hold to make adjacent selections. (b) Allow you to select non-adjacent events.
 (b) Events in one event set, click **New** then follow the instructions in the section **Create Data and Events** on page 217.
4. Use the arrow buttons **←** **→** to set the order of event sets in the library.
5. Click **Done**.

Select default reporting event type

1. Click the **Events** button.
 (b) click **Template > Events**
2. Click the **Event** tab.
3. In **Default Event Type**, select an event type.
4. Click **Done**.

Note: At least one event of the chosen event type has to be configured on the template.

Fluid Balance Window

The Fluid Balance window shows total fluid intake and output graphically. You can choose fluid type formula.

- See graph with multiple time series (Intake, Output, Intake-Output, and optionally, Reservoir and Distribution). Change set event to all time series except Distribution.
 You can use the default time series and for all time series except Intake-Output, the time period (current or previous).
- The chart shows the current balance for the admission and, optionally, for the encounter as well.
- A special section for further fluid inputs is available with three sub-items: one for fluids documented by the anesthesiologist, another for fluids documented by the nurse/nurse and a third for total IV fluids and output.

The window is opened on the Fluids Fluids and chart. It must belong to a fluid family that is designated as "fluids". You can configure your fluid inputs in the **Setup** for fluids. It is possible to include also other "fluids" in the series of fluids Fluids, as shown in the following example.

Book 10

- **Book 10**
- **Book 10 - Chapter 1**
- **Book 10 - Chapter 2**
- **Book 10 - Chapter 3**
- **Book 10 - Chapter 4**
- **Book 10 - Chapter 5**
- **Book 10 - Chapter 6**

Book 11

- **Book 11**
- **Book 11 - Chapter 1**
- **Book 11 - Chapter 2**
- **Book 11 - Chapter 3**
- **Book 11 - Chapter 4**
- **Book 11 - Chapter 5**
- **Book 11 - Chapter 6**

If you prefer that visible Book 11 titles in the database, you can create them using the following:

Configure the first instance window

1. Click the **First Instance** button.
 - **File Template - First Instance**
2. In **Format**, select the first instance type.
3. Click **Visible** of the **View** tab. In the buttons for the **Visible** and **Unvisible** view the groups in the **Unvisible** view get visible.
4. For the groups, under **Default View**, select a default view from the following:
 - **Book 10**, **Book 10 - Chapter 1**, **Book 10 - Chapter 2**, **Book 10 - Chapter 3**, **Book 10 - Chapter 4**, **Book 10 - Chapter 5**, **Book 10 - Chapter 6**, **Book 11**, **Book 11 - Chapter 1**, **Book 11 - Chapter 2**, **Book 11 - Chapter 3**, **Book 11 - Chapter 4**, **Book 11 - Chapter 5**, **Book 11 - Chapter 6**.
 The default view selected can be the current period or the previous period for the chosen period view. For example, the current period is previous period. If selected is shown as the default view.
5. Click **Done**.

Configure second first instance

1. Click the **First Instance** button.
 - **File Template - First Instance**
2. In **Format**, select **First Instance** type.
3. Click **Visible** button.
4. Under **Available Visible Functions**, select the names of the functions to use the Accounting System first instance and visible.
5. Click **OK**. The chosen functions are added to the selection list.
6. To remove a function from the selection list, click its name in **Visible Functions for System**. Then click **Done**.

Application Template Configuration

View Other Features

1. User Story

Patient Summary

The Patient Summary provides an overview of patient data from a particular date period to help clinicians track a patient's progress and comprehensively key information. Users can generate a summary document monthly per patient at the report or end of a shift. Users can also view different types of notes in a report if available and is available. Users can view appointment reports in the integrated information system (MIS).

A summary can include the sections listed in the following table:

Section	Key Features
Images	Images documented in the Demographic window
Notes	Notes entered by clinician in the Patient Summary module
Events	Events from either the selected viewing period or the last 12 hours, dependent on user selection
Lab Values	Prescribed labes present only for selected diagnosis, symptoms and laboratory components
Medical Orders	Active forms, medications and procedures
Measurements and Events	Results of nursing measurements and events
Visit Summary	The history for the current visit, previous visit, current day, previous day, and the entire admission
Procedures and Examinations	Procedures and examinations documented in the Demographic window

What you can configure

- Sections to include in the report
(See [Configure sections in a report on the Setup page](#))
- Tables and diagnosis lists
(See [Add a diagnosis table with an image ID](#))
- Tables for laboratory results
(See [Add a laboratory table on page 127](#))
- The order of data table in a report

- **How:** Change the order of data tables on page 1213
- **How:** Configure that users can select other meeting reports
 - **How:** Configure meeting periods for the report table
- **How:** Report available to users
 - **How:** Create a profile to add user on page 1213
- **How:** You can allow users to select alternative reports in the UI and configure up different possible report sets. This is a configuration setting
 - **How:** Select Business Report in the UI on page 1213

Configure meeting periods for the report

1. Click the **Report Summary** button
 - **Go:** **Report > Report Summary**
2. Click the **Meeting Periods** tab
3. Under **Configure Meeting Periods for:** click **Current Report tab or Name tab**
4. In **Standard Periods**, click each meeting period you want to include and then click **OK**

The **Standard Periods** box includes **Current date**, **Previous date**, **Current day**, and **Previous day**. The date is setting with time, and configure the day and weekend on page 1213

The **Meeting order** is **Meeting date** meeting period others users to define custom meeting period
5. To create a new period, do the following:
 - In the **Custom Period box**, click **+** icon for the meeting period
 - In **Location** enter the location of the period or leave up to **UI**
 - Click **OK** to add the period to the **Selected Time Periods** box. Repeat this step for each meeting period you want to **UI**
6. To remove a meeting period from the list, click it in **Selected Time Periods**, and then click **OK** (Note that you cannot remove the **All Dates** meeting period.)
7. Set the order of meeting periods for both the left report and table:
 - In the **Selected Time Periods** box, click a time period
 - Click the up or down arrow to move it to the order position
8. Set the default time period:
 - In the **Selected Time Periods** box, click a time period
 - Click **Set as Default**
 - In **Current Configured box**, under **Current Report tab**, click a meeting period
9. When you have finished configuring the **Report Summary**, click **Close**

Configure sections for a report

1. Click the **Report Summary** button

Application Template Configuration

New Report Features

Go into Template in Patient Summary

1. Update the patient configuration screen to display as follows:
 - In the General Configuration box under **Heading and Footer**, add an identification number.
2. Change sections to include on the report:
 - In the General Configuration box, under **What is it corresponding printing**, select the check box for each section to include.
 - Check which boxes the sections you do not want to include.
3. Set the sort order for notes:
 - In the General Configuration box, under **Notes**, click **Sort by date - ascending** to display notes from oldest to newest or click **Sort by date - descending** to display notes from newest to oldest.
4. Edit the title of a section or subsection:
 - In the General Configuration box, under the title:
 - Click **Edit**.
 - Enter the new text.
 - Click **OK**.
5. Reorder report sections:
 - In the General Configuration box, under a title:
 - Click the up or down arrow to move it to the new position.
6. When you have finished configuring the Patient Summary, click **Done**.

Add a Physiological Table

1. Click the **Patient Summary** button.
 - Go into Template in Patient Summary
2. Click the **Table** button and open the **Physiological** tab.
3. Click **New** to display a screen for selecting variables for a new table.
4. When you have finished selecting variables, click **OK**.

The system creates a new table with the selected variables and adds it to the **Table** group with a serial identification code (XXXXXX-XXXX-XXXX-XXXX).
5. Edit the table's title and highlights in the **Table** group, enter a title for the physiological table in the **Table** box.
6. Configure the values to display for each variable as follows:
 - Click **Show lowest**, **highest** and **last value** to display the lowest, highest, and last record values generated during the time period.
 - Click **Show difference** and **OK** to display **OK** for all variables based on the availability of data for a particular variable. The table includes a column for every variable where the

reference variable. The reference variable does not give to the part of the table, although it results in:

- In **Reference Variable**, enter the variable to use. Note that the reference variable is usually a variable in a related reference variable.
- In the **Number of Columns** box, enter the number of results to display up to eight. The report shows the number of results. If equal the, even if they were not collected in the time period covered by the report.

- To change the position of a variable on the table, select it in the box in the lower left corner and then click the up or down arrow.
- When you have finished configuring the report, click **Done**.

Example of a table that uses a reference variable

Use reference variable selected:

Reference variable: Gender (Gender ID)

Number of columns: 5

Other variables: Year from 2015, 20 years from 2015, 20 years from 2015, 20 years from 2015, 20 years from 2015

Reference variable: Year from 2015

Whenever a result is available for all the other results of the other variables are shown:

	2015	2016	2017	2018	2019
2015	100	100	100	100	100
2016	100	100	100	100	100
2017	100	100	100	100	100
2018	100	100	100	100	100
2019	100	100	100	100	100

How to reference table

Before you can add a reference table, the table must be created and named or use the elements in the table reference table (columns, rows, components, and components) must be created.

- Click the **Table Summary** button.
- Click **Configure** in **Table Summary**.
- Click the **Table** tab and then click the **Table** tab.
- Click **Table** to display a window for selecting variables for a new table.
- When you have finished selecting variables, click **OK**.

The system creates a new table with the selected variables and adds it to the **Table** box. Only a default identification code is added, such as 100.

- Click the **Table** box and click **Configure** in the **Table** box, click a table for the reference table in the **Table** box.

Application Template Configuration

View Report Features

1. In the **Number of Columns** box, enter the number of results to display per page. The table shows the number of results. If available, show if they were not collected in the time period covered by the report.
2. To change the position of "1" in results on the table, select it in the box in the lower left corner and then click the up or down arrow.
3. When you have finished configuring the report, click **Done**.

Change the order of table tables

1. Click the **Report Summary** button.
 - a. **View Template > Report Summary**
2. Click the **Table Tables** tab.

The tab shows the phylogenetic table tables and tabulating table configured for the **Report Summary**.
3. In the **Legend** tab, click a table name and use the arrow buttons to move it up or down on the list.
4. To remove a configured table from the **Report Summary** without deleting it, click the check box next to the table name. (Click the check box a second time to delete the table.)
5. Click **Done**.

Add or remove a parameter from a table table

1. Click the **Report Summary** button.
 - a. **View Template > Report Summary**
2. Click the **Phylogenetic** tab in the tabulating tab.
3. In the **Table #** box, select the table or list for the table you want to edit.
4. Click **Edit**.
5. In the **Available Parameters > Available Parameters** box, select the parameters you want to add to the table. Then click **Add** on.
6. In the **Selected Parameters > Selected Parameters** box, select the parameters you want to remove from the table. Then click **Remove**.
7. Click **OK**.

Delete a table

1. Click the **Report Summary** button.
 - a. **View Template > Report Summary**
2. Click the **Phylogenetic** tab in the tabulating tab.
3. In the **Table #** box, select the table or a row for the table you want to delete.
4. Click **Delete**.
5. Click **Done**.

Configure the subject summary to report in the UI

This is configured at the application level using Configuration Editor. See Subject Summary Config in the [UI User Guide](#).

Medication Summary

The Medication Summary shows all medication doses administered in a time period and the total cost for each month. You can filter the periods include the last 1, 3, 12, or all months, the current encounter, and the entire admission.

What you can configure

- The default sort order for the list of med orders
- The default view period for which to display data
- How to display total costs for medications ordered with a dose based on body weight

Configure the Medication Summary

1. Click the **Medication Summary** button.
Go to **Template > Medication Summary**.
2. In the **Sort Medications by** row, select a default sort order for the medication list.
 - **Medication name** is sort medications alphabetically by their names.
 - **Administration time** is sort medications chronologically by the first dose.
 - **Family name** is sort medications alphabetically by the name of the family to which they belong. If you select this option, the name of the family is included in the display.
3. In the **Default Viewing Period** row, select the viewing period to display by default.
4. To include or filter out the med orders that were ordered with a dose based on patient weight, select **Include** or **Exclude** values for **weight-based doses**. The first row for the medication shows values per unit or body weight. The second row shows calculated doses using the weight documented for the patient.
If you do not select either one option, the summary window displays only the weight and values.
5. Click **Done**.

Demographics

You can configure the Demographics section with the Demographics Editor in Medscape. To use the Demographics Editor, you must belong to a user group with the system right **Manage Demographics**. After a configuration has been created, it can be used to filter information by returning and reporting it.

For a full list of available sections, see patient data items, see the [Medication User Guide](#).

Application Template Configuration

See Other Features

What you should know

The way that each country uses the **Flags** and **Abbreviations** fields for the **Region Identification** sections in data is often an governmental guideline you apply. Even within a country, templates may apply different requirements. As an example, the following table shows mappings and criteria from the American Research and Measurement set of data tables.

Source code	Source country
- USA - State or Other Division - American Indian or Alaska Native - Hispanic - Native Hawaiian or Other Pacific Islander - Unknown	- Flagship or codes - Key Flagship or codes - Abbreviation

Example of how an office group might

What you can configure for the template

- The sections, subsections, and data elements to include and their order
- The headings, abbreviations, and keys for data elements within sections
- The ordering order of each subsection and element
- The data required for creating a new Abbreviation table are highlighted in the Demographic section and the user order table for them.

See Another

For examples that make the flagging, configuration and data set is needed to setting up regional data for the American Research and Measurement set of data.

These settings are configured in the **Template + Demographic** section.

Note: The **Flagship** table in the **Template + Demographic** section provides access to other demographic settings that affect the entire estimation operation of template. For more information, see **Demographic** and **Table** for **Demographic** settings on page 100.

Note: For information on further configuration options specific to **Geographic**, see **Geographic** on page 100.

Before configuring the **Demographic** section, it is helpful to view the entire content. Consulting the information you want to display and how you want to set it. Following with each data table.

can be seen. This is especially true in sections that have subheadings. The following examples show the possible arrangements.

At possible subheadings and items

Images and Descriptions

Multiple Images

- Multiple Images: Multiple Reaction Post and Reaction - 1 year ago Comments: Followed not sure other reaction accepted
- Multiple Images: Multiple Reaction Post and Reaction - 1 year ago Comments

One Image

- Image: One Image Reaction: ImagePost and Reaction - 1 year ago Comments: Reaction was not working
- Image: One Reaction: ImagePost and Reaction - 1 year ago Comments

Reaction

- Reaction: One
- Reaction: Difficult Image

At subheadings and items, not at all levels

Images and Descriptions

Multiple Images

- Multiple Reaction: One and Reaction - 1 year ago Comments: Followed not sure other reaction accepted
- One Reaction: Post and Reaction - 1 year ago Comments

One Image

- One Image: Reaction: ImagePost and Reaction - 1 year ago Comments: Reaction was not working
- One Reaction: ImagePost and Reaction - 1 year ago Comments

Reaction

- One
- Difficult Image

to subheadings and all items:

Example: new Open items

- Education thing: Results from 11 years ago: Results not with other questions answered
- Education thing: Results from 11 years ago
- Other thing: New thing: Implications: 11 years ago: Results not with other questions answered
- Other thing: New thing: Implications: 11 years ago
- Researcher: Results
- Researcher: Results: Results

Select sections for the Demographic section

1. Click the **Demographic** section button.
In case: **Template** - **Demographic** button.
The section displays a list of sections that can be included in the Demographic summary card.
2. To display a section in the summary, select the **Include** check box.
3. To change the position of a section, select it and then click **Move**. Enter a new name and click **OK**.
4. To change the position of a section, select its heading and click an arrow button as many times as necessary.
5. When you're finished selecting sections for the Demographic section, click **Done**.

Configure a Demographic section

1. Click the **Demographic** section button.
In case: **Template** - **Demographic** button.
2. To change the name of a section, select it and then click **Move**. Enter a new name and click **OK**.
3. Select a section heading and click **Setup**.
In case: click a section heading.

The section editing displays a list of subheadings and items that can be included in the section. The current configuration of each element is indicated by check boxes in the **Include**, **By**, **By**, **By**, **By**, **By**, and **Required** columns.

Note: When configuring these sections, the "Last Used" value includes "Last Used" and "Last Used" and settings are in the "Last Used" value, which is the last used and first in use.

4. To display a table element in the section, select the **Include** check box.

- To prevent users from changing data for an address, select the **No editing** check box. When this element is selected only the values in the address window, but neither its data entry forms.
- When elements are always read-only but can still be entered by the system, these items appear in **g** in front of the system heading and the system app. Consider making an element read-only if the data is always received from the template information system (PIS).
- To add a subheading to that data, select the **Sub-Tab** check box. Consider adding text for items that can be referenced without any identifying text, such as the address's name.
- To specify app or item to be required for user completion, select the **Required** check box.
- When you have finished configuring the address, click **Done**.
- When you have finished configuring the demographic window, click **Done**.

Note: The  button modifies subheadings and the  button sets elements.

Configure system events

- Click the **Storage** app's **Filter** button.
to view **Template > Demographic** filter.
- Select the **My Events** section heading and then click **Setup**.
to modify the **My Events** section heading.
- Click **My Events**.
The Events Configuration window appears.
- Under **Structure Events**, select the events that must be documented in the specific order.
For example, **Goodfriend** and **Event** appear with before **Goodfriend** and
 - in the **Type** box, select an event type or select **All Events**;
 - in the **Events** box, select the required events from the given event type. Then click on to move that to the **Selected Events** box on the right;
 - To set the order of structure events, click an event in the **Selected Events** box and use the arrow buttons to move it up or down on the list.
- Under **Other Events**, select the events that can be documented in any order.
 - in the **Type** box, select an event type or select **All Events**;
 - in the **Events** box, select the specified events. Then click on to move that to the **Selected Events** box on the right.
- Under **Required Event Types**, select the types that must be documented.
 - in the **Type** box, select the required event types. Then click on to move them to the **Selected Types** box on the right.
- To remove a selected event or event type, click it in the selected box on the right, and then click on.
- When you have finished selected events, click **Done**.

Application Template Configuration

New Object Features

1. When you have finished configuring the section, click **Done**.
2. When you have finished configuring the Demographics section, click **Done**.

Configure medical team roles

1. Click the **Demographics Editor** button.
Go to **Template > Demographics Editor**.
2. Select the **Medical Team** section heading and then click **Edit**.
Go directly into the **Medical Team** section heading.
3. Click **Roles**.
4. In the **Medical Roles** box, under **Medical**, click the medical roles to appear by default in the **Medical Team** box.
5. In the **Medical Roles** box, under **Support**, click the other roles that must be documented by every user.
6. When you have finished configuring medical roles, click **Done**.
7. When you have finished configuring the section, click **Done**.
8. When you have finished configuring the Demographics section, click **Done**.

Configure medical functional types and clinical profiles

1. Click the **Demographics Editor** button.
Go to **Template > Demographics Editor**.
2. Select the **Diagnoses, Procedures, and Other Concepts** section heading and then click **Edit**.
Go directly into the **Diagnoses, Procedures, and Other Concepts** section heading.
3. Click **Diagnoses**.
In the **Functional Types** box, click the functional types of diagnoses that must be documented by every user.
For each selected functional type, click the **Clinical Profiles** that a user must document for every user of any.
Click **Done**.
4. Click **Procedures**.
In the **Functional Types** box, click the functional types of procedures that must be documented by every user.
For each selected functional type, click the **Clinical Profiles** that a user must document for every user of any.
Click **Done**.
5. When you have finished configuring the section, click **Done**.
6. When you have finished configuring the Demographics section, click **Done**.

Export a Demographic configuration

1. Click the **Demographics Editor** button.
Go to **Template > Demographics Editor**.
2. Click **Export**.
3. Select a template to which you want to export settings for the Demographics window and then click **OK**.
4. When you have finished configuring the window, click **Close**.
5. When you have finished configuring the Demographics window, click **Close**.

Export a Demographic configuration

1. Click the **Demographics Editor** button.
Go to **Template > Demographics Editor**.
2. Click **Export**.
3. Select the template to which you want to export the Demographics configuration and then click **OK**.
To select more than one template, you can hold down the **Ctrl** or **Cmd** key while you click. **Ctrl** allows you to make adjacent selections, while **Cmd** lets you to make non-adjacent selections.
4. When you have finished configuring the window, click **Close**.
5. When you have finished configuring the Demographics window, click **Close**.

Flowsheets

About Flowsheets

Flowsheets can consist up to 40 flowsheets. The first flow sheet is standard and will show all available data for use in up to 100 data table rows.

- **Physiologic Variables** - All physiologic variables collected for the patient chart.
- **Medications** - All medications ordered or documented for the patient.
- **Fluids** - All fluids ordered or documented for the patient.
- **Laboratory Results** - All laboratory components. You also include any laboratory components that are configured as physiologic variables. These are shown under the laboratory and diagnostic tests.

Standard Dashboards cannot be edited. You can customize their content by adding or removing widgets, widget settings (such as colors and labels), or, for all dashboards except Playbooks, layouts. You can also add or remove individual widget settings. You can also add and remove tabs for the left and bottom viewing structure for standard Dashboards.

In addition to the four of report Dashboards, Splunk can include up to 40 custom Dashboards. Each Dashboard can have up to five sections that display data in table format or as graphs. Custom Dashboards can include a variable from the user input type, percentage, variable, indicators, fields and indicator, components and the following additional types:

- Annotations
- Events
- Recent Logs
- Regexp
- Tables and Table-like Data
- Timeline
- UI Indicators

Each property in configuration, dashboards, equipment and UI indicators can be displayed as operational status in Dashboards, as well. To display status in both on Dashboards, you must set the following configuration setting to "1".

Advanced Settings = **Advanced** mode = **UI/UX/UI** section = **Show Equipment Assessments**

Advanced Settings = **Advanced** mode = **UI/UX/UI** section = **Show UI Assessment**

Playbooks can also add other types of data on Dashboards configured by Dashboards without difficulty.

- You can only include variables that have already been selected using the Playbooks variable list.
- When you configure a section with any other type of data, data only appears in the Dashboard if they are added to the chart. These parameters may be added to the chart in a default position or by using a search.

Dashboards cannot automatically update on the Dashboards menu and on the Navigation bar.

Configuration Options for All Dashboards

Global configuration options apply to all Dashboards. These include the following:

Application Template Configuration

Feedback

1. **Unit Options:** It does not matter which feedback is selected because options apply to all feedback.
2. In the **Available Questions** box, select the questions to include and click on to move them to the **Selected Questions** box.
To remove a question, select it in the **Selected Questions** box and click on.
3. When you have finished configuring desired questions, click **Done**.
4. When you have finished configuring feedbacks, click **Done**.

Best Practice: Each feedback has a default scoring mechanism (see [Scoring and Grading](#)). **Feedbacks** in the **Learning Tools** table have the full set of available operations, whereas all of the other feedbacks

Configure the position of the correct line column

1. Click the **Feedbacks** button.
Or: **Unit Template** > **Feedbacks**
2. **Unit Options:** It does not matter which feedback is selected because options apply to all feedback.
3. In **Position of correct line column** under **right**, select a number (1 = first column).
4. Click **Done**.
5. When you have finished configuring feedbacks, click **Done**.

Configure the option to collapse device table

1. Click the **Feedbacks** button.
Or: **Unit Template** > **Feedbacks**
2. **Unit Options:** It does not matter which feedback is selected because options apply to all feedback.
3. Click **Enable** (see **collapsible**) to allow users to collapse device table, or click the box to prevent collapse.
4. Click **Done**.
5. When you have finished configuring feedbacks, click **Done**.

Show unit or incremental values for cumulative test output

1. Click the **Feedbacks** button.
Or: **Unit Template** > **Feedbacks**
2. **Unit Options:** It does not matter which feedback is selected but use options apply to all feedback.
3. Click **Display incremental values for cumulative test output** to show correct and wrong test values in the **Feedback** or click the check box to show only scoring results.
4. Click **Done**.

- When you have finished customizing Feedback, click **Done**.

Configure how orders are displayed

- Click the **Feedback** button.
 - Click **Template > Feedback**.
- Click **Options**. It does not matter which Feedback is selected because options apply to all Feedback.
- Click **Show complete description as Feedback is shown first** or **Hide**, or click the check box if you want to show short details.
- Click **Done**.
- When you have finished customizing Feedback, click **Done**.

Configure the default steps to ship

- Click the **Feedback** button.
 - Click **Template > Feedback**.
- Click **Options**. It does not matter which Feedback is selected because options apply to all Feedback.
- Click **Show description steps for steps to ship** or **Hide** and the steps are the steps by default, or click the check box to show just the steps without the by default option.
- Click **Done**.
- When you have finished customizing Feedback, click **Done**.

Configure the items

- Click the **Feedback** button.
 - Click **Template > Feedback**.
- Click **Options**. It does not matter which Feedback is selected because options apply to all Feedback.
- To set the default steps, check the following check boxes:
 - ☐ **Show outsidings by default**
 - ☐ **Hide discontinued orders by default**
 - ☐ **Hide cancelled orders by default**
- Click **Done**.
- When you have finished customizing Feedback, click **Done**.

Creating and Modifying Feedbacks

You can create multiple Feedbacks of different Feedbacks, with up to five questions and default answers. You can also modify existing order Feedbacks and create new ones. The system Feedbacks will not allow configure the items, comments and Feedback questions. Feedback questions

Application Template Configuration

Feedback

you share data to include text or an image. If desired, you can enable an entire feedback to share.

Example: You can create a feedback to share the completion message notifications of a task number. For example, the manager could have administrative email addresses notified in one action and the notifications that allow administrative functioning is enabled.

Example: You can create a feedback to automated documentation for a user group or state of system use. For example, a summary of the data on administrative needs is able before transferring the action.

Create or edit a custom feedback and system properties

1. Select the **Feedbacks** action.
 - Go: **Feedbacks** > **Feedbacks**
2. Click **New** to create a new feedback, or select an existing feedback and click **Edit**.
3. In the **Title** box, enter the name you want to use to identify the feedback in Business.
4. In the **Feedback** box, enter the text to appear on the **Feedback** page.

Best Practice: Use the same text as in the **Title** box.

Note: The title includes a feedback structure by entering an appropriate ID before any of the words in the title. When a user creates a feedback and then opens a form, the title will be displayed in the comments area. Having the title will then open the feedback. For more information see the topic on structure in the **Structure** topic field.

5. In the **Default Notification** box, select the timing duration to apply by default.

Best Practice:

For announcements only, select 15 minutes.
For alerts related only, select 30 minutes.
For urgent only and only, select 30 minutes.

6. Select the **Force Feedback** box. Auto-scrolling by default opens the feedback page with the feedback to auto-scroll when it is opened.
7. Select the **Show only new** checkbox by default. Check box if you want the feedback to get closed only.
8. When you have finished customizing the feedback, click **Save**.

Create or edit a custom feedback action

1. With a custom feedback selected in the main feedback configuration screen, click **Setup**.
2. Click **New Action** to create a new action.
 - Click a custom action or then click **New** to add an unlisted action.

Application Template Configuration

Prerequisites

1. In the **File** box, enter a file and the section. (The text appears in the section header.)
2. In the **Available Phrasingtype Variables** box, select the variables to include and then click **Add** to move them to the **Selected Variables** box.
3. In the **Available Value to choose** box, select what a data type is expected or not expected.
4. Select a group or an individual item to include and then click **Add** to move the selection to the **Selected Items** box.
(Further groups or items can be added from the same list type or from another data type.)
5. Click **Results if None** if you want to include this word.
6. Click **Results from None** if you want to include this word.
7. Select an option for **PHR** Variable, or Continuous from the **Schedule Type Filter** drop-down list.

Note: The initial value in the **Schedule Type Filter** box is blank, indicating that no filter type is selected, and the drop-down list is open in blue. To remove a filter, select the blank value.

Note: This configuration that you do not apply there is the **in** **Modifications** and **Results** get treatment.

10. Click **OK**.
11. When you have finished configuring treatment sections, click **Close**.
12. When you have finished configuring treatments, click **OK**.

Best Practice: In most cases, you should add variables rather than individual modifications or flags to the section. First, if you add the family, age, custom treatment, chapter, and modification/flag of the type that is selected during the section. Second, the strategy makes updated treatment words if new items are added to existing families in the database; you do not need to add them to separate sets. You should only add modifications or flags individually when you do not want one of more from the same family to appear in the treatment.

Configure a treatment area in the section by a schedule

This is an optional configuration used in the section or a treatment area by a schedule, PHR, Variable, or Continuous Management Treatment, and based on the only flag in a PHR group, input on the only display in Variable group.

Note: This option only is visible in the treatment area. Default value is not there.

1. With a custom treatment selected in the main treatment configuration window, click **Setup**.
2. Click a section name and then click **Setup** to add an existing section.
3. In the Section Setup window, select the schedule type from the **Schedule Type Filter** drop-down list. Options are PHR, Variable, and Continuous.

Note: The null value in the **Network Type Filter** list is blank, indicating that no filter type is selected. You also may choose not to select a filter.

4. Click **OK**.

Create or add a host section in a Firestorm

1. With a custom dashboard selected in the main Firestorm configuration window, click **Setup**.
2. Click **Create or add** next to host section.
3. In the **Section Filter** box, enter a title for the host section. (This text appears in the section header.)
4. In the **Available Groups** box, select a group to add to the host section.
To create or add a host settings setting to the group, click **Create or add a host to use in any Firestorm**, then:
(To create a host, select its name in the **Available Names** box, and then click **Create**.)
5. Click **Close**.
6. When you have finished configuring Firestorm sections, click **OK**.
7. Click **Close**.

Create or add a host for use in any Firestorm

This can create up to 10 hosts for use in Firestorms.

1. Click the **Create** button in the **Template** or **Firestorm** window.
You can also click the **Create** button in the **Firestorm Setup** window.
2. Open a host.
To create a new host, click **New**.
To open an existing host, select its name in the **Available Names** box and then click **Setup**.
3. In the **Title** box, enter the name of the host. (This text only appears in the list of hosts in Firestorms.)
4. If you want an overall name for all hosts, click **Options**, set the name range in the **Host** and **File** boxes. This name is applied to all parameters that do not have an independent name setting.
5. If you want the capacity to adjust automatically in the data stream, click **Auto-scale**. There are options between the **Min** and the **Unlimited** scale while viewing the host.
6. To display your host by default, click the **Host** **Host** check box. There are other options that the grid offers viewing the host.
7. Set up to the parameters in the host. For a list of parameters, provided as follows:
 - **Index Name**: select the type of data. Then click **OK** and select a host. (The instructions in **Host**, under **Parameter** and **Host**.)

Application Template Configuration

Procedure

- Under **Label**, you can add the abbreviated name for a modification, field, or identifier component. (For placeholder variables, the label is a property of the variable.)
- Label text is displayed in the lower right.
- Under **Value**, click **OK** to select a value for the parameter.
- Under **Style**, select a type of graph line, or bar, or text.
You can use this to modify our modifications, fields, and identifier parameters.
You can use any type of graph for placeholder variables.

Best Practice: When there are lots of placeholder variables in a graph, use an offset to read a data stream on the graph itself.

- Under **Marker**, select a marker if you are configuring it on the graph. For text graphs, markers are optional.
- To display the value for every data point, click **Up Value** above the line.
- In the typical range of values for a parameter is not compatible with the overall y-axis context, create a separate y-axis for the parameter. Click the **Y-Axis** option box and enter the range for the axis in the **Range** and **Offset**. It must not have up to three independent axes of addition to the overall axis.

- When you have finished configuring the chart, click **OK**.

Steps to finished section

- With a custom template selected in the main dashboard configuration window, click **Setup**.
- In **Dashboard Sections**, click a section name and then **Details**.
- Click **Done**.

Steps to chart

- Click the **Template** button.
Or, click **Template** in **Tools**.
You can also click the **Template** button in the **Dashboard Setup** window.
In the **Available Templates** box, click the name of the chart you want to display.
- Click **Done**.
- Click **Done**.

Adding sections to a custom dashboard

- With a custom dashboard selected in the main dashboard configuration window, click **Setup**.
- In **Dashboard Sections**, click a section name and then click the up or down arrow to move it to a new position.
- Click **Done**.
- When you have finished configuring dashboard sections, click **OK**.
- Click **Done**.

Change the order of Feedbacks in the application

The setting determines how Feedbacks are listed in the Navigation Bar and in the Feedback Menu.

1. Click the Feedbacks button
 - 1a. click Template > Feedbacks
2. Select a Feedback that you want to move
3. Click the arrow buttons to move the Feedback up or down in the list
4. When you have finished configuring the Feedback list, click Done

Best Practice: Arrange the four standard Feedbacks at the top of the Navigation Bar, followed by the custom Feedbacks.

The default:

```

- Feedback Menu
- All Feedbacks
- All Items
- All Laboratory Results
- Custom Feedback 1
- Custom Feedback 2
  
```

Sort a Feedback

1. Click the Feedbacks button
 - 1a. click Template > Feedbacks
2. Select a Feedback and then click Done

Configure the copying forward of checklist data

You can configure the copy forward of previously entered Feedback data by the following methods:

- Assessment
- All indicators
- Subgroup

By default, all treatments in your categories will copy forward all past notes from the last time entered in their documentation records.

You can instead configure specific Feedbacks or treatments to copy forward data. The next step that you configure, you can also specify whether to copy forward notes.

As soon as you configure one or more items to copy forward into those items will copy forward.

Application Template Configuration

Other Windows and Accessories

If you do not want any users to copy forward, you should configure copy forward to a single "dummy" app that will not be used by any users. This should include an assessment entry to get around what is called the "GAB" ("do not use"):

Note: Before configuring the copy forward app, you also need to specify the assessment that will use the dummy template. For more information, see [Creating and Deploying Assessments](#), on page 109.

Configure copy forward to specific available items

1. Click **Template > Copy Forward**.
2. In the **Available Items** pane, select one or the group or individual item you want to configure. (Choosing one = app used in a group to be copied to by the = app used in a group to be copied to.)
3. Select the group or individual item and then click **Add** to add the selection to the **Selected Items** pane.

Note: The item or group that you select will use copy forward to items, but not users.

(If you want to remove all items in group with the **Selected Items** pane, select it, or then click **OK**.)

4. If you want a selected item item or group to copy forward when the condition is false, double click it in the **Selected Items** pane. It will appear with a green **F**. (Double clicking the item or group a second time will remove the red number and convert it to only items to be copied forward, but not users.)
5. Click **Done**.

Other Windows and Accessories

Themes

The app includes up to 10 assessments on the optional **Themes** pane. Typical user include being provided with an optional background and colors. (You can also use the app using the browser app P16, P17, and P18. Buttons for getting themes can be included in the main toolbar after you set the properties of toolbar on the **Toolbar** screen on page 109.)

Create a theme

1. Click the **Themes** icon.
 - (b. Click **Template > Themes**.)
2. Set up theme associated with the template to be deployed.

Application Template Configuration

Other Windows and Mac OS X

1. Click **New**.
2. In **Window Title**, enter a name for the window. The text appears in the title bar of the final window.
3. In **New Command**, enter the command to appear in the **Tools** bar. You should make the command the same as the final window title to help users remember what command controls each step.
4. Click **OK**.
5. The new step appears in the list. A toolbar icon, if not set, is automatically assigned to the first step shown in the list. Users can choose the command or press the toolbar icon to start or stop the step.
6. When you have finished configuring windows, click **Done**.

Change a New window title and/or command

1. Click the **Tools** button.
 - to: **View Template > Tools**
 - A list of items associated with the template is displayed.
2. Select: item to modify.
3. Click **Edit**.
4. In **Window Title**, edit the window title if necessary.
5. In **New Command**, edit the command if necessary.
6. Click **OK**.
7. When you have finished configuring items, click **Done**.

Remove a Step

1. Click the **Tools** button.
 - to: **View Template > Tools**
 - A list of items associated with the template is displayed.
2. Click **Step**  to remove all items.
3. Select a step: or then click **Remove** to remove a specific step.
4. When you're finished configuring items, click **Done**.

Quick Links

You can integrate different types of actions called "quick links" with the software that is under application development.

- **Warning** will add a note event to the Events log in a single step. They're often used to notify users about things they're not aware of, such as the application interface. Buttons may be configured to appear above or after they have been used.

Application Template Configuration

(After Windows and Windows)

The Quick and simple allows you to design custom reports as buttons on the **Buttons and Menus** ribbon. If the report reports don't already exist you must first create them using the same filter as described. After completion, an event will be created. (See page 272)

- Programs are designed to custom software, not use the template on the application or on a website website. It gives the program map to map how to generate only the custom report. Titled with the program inside the programming inside. They through, not internal storage.
- Screen reports, is provided an opportunity of application software that create special view of other data. Programs can apply reports during a session to change their report.
- This screen will be provided access to a set of this function by a screen. It can be accessed from both direct and administrative from application. Available functionality currently includes this stage, not the document stage.

Quick and simple from the following application ribbon:

- Buttons appear on the **Buttons and Menus** ribbon.
- Programs and this screen will appear on the **File API** ribbon.
- Screen reports appear on the **Application** ribbon.

Next, the **Buttons** ribbon also shows details and the ribbon is displayed automatically when all data and reports in the is configured.

Buttons, Programs, This screen will appear and Screen reports can be designed a simplified way to be used to select the software with the software. They are not present API and that screen is called. The ribbon will be updated in the software with. Pressing the ribbon will then activate the software. For more information see the page on details of the **Buttons** ribbon.

Configure a screen as a quick view

1. Click the **Quick and simple** button.
 - (a) **Quick and simple** - **Buttons and Menus**
2. Click the **Buttons** ribbon.
3. Click **File**.
4. In **Buttons and Menus** click **Buttons**.
5. Select a screen to add from the screen list. (The screen is not screen, but **File** that shows the information in the screen. (See page 272)
6. In **Buttons**, enter a comment will be added directly the button name on the **Buttons and Menus** ribbon.
7. In **Buttons** **File**, enter a ribbon with the comment will be used as a shortcut to select the ribbon with the software software.
8. Select the **Buttons** ribbon from the **Buttons and Menus** ribbon and select the **File**.

Application Template Configuration

After Windows and Windows Firewall

- If you do not select a specific icon, a default icon will be used.
- To make the button appear pressed in after use, use **Depressed appearance after use**. You may want to use this option for buttons that represent one-time actions. It causes the button to appear pressed in after it has been used once, showing users that the action has been performed. (The button can be clicked again.) The option is useful for actions that occur rarely but are otherwise in a process, such as "Start a download."
- Click **OK**.
- Use the **Move** arrow to change the position of the button on the **Buttons** sheet. (The corresponding buttons on the **Form** sheet appear in the same order.)
- When you have finished configuring your rules, click **Done**.

Configure an external application as a quick rule

- Click the **Quick rules** button.

 - Click **Template > Quick rule**.
- Click **Yes**.
- In **Quick rule type**, click **Program**.
- Click **Yes** and then click **OK** so that the wizard you want to type the rule into the rule. (The file name must have the extension ".exe".)
- In the **Comment** box, enter the text to appear beneath the button name on the **Buttons** sheet. The field makes the content the same as the application name in help users understand what button controls what quick rule.
- In **Shortcut key**, enter a letter from the comment name. It is used as a shortcut to select the control on with the keyboard option.
- If the application is installed in a file path to the system (for example, if it is another third application such as **Power Manager**), click **Specify action (URL) and address (URL)**.
Go quick rule. Confirm your details in address provided if you are not sure.
 Otherwise, leave the field blank because some applications cannot interpret the specified information and therefore cannot run correctly.
- In **Additional keywords**, enter any others or use comment-line modifiers that are supported, if necessary. (For the information on additional keywords see in the section.)
 Confirm your details in address provided if you are not sure.
 Otherwise, leave the field blank because some applications cannot interpret the specified information and therefore cannot run correctly.
- Click **OK**.
- When you have finished configuring your rules, click **Done**.

Application Template Configuration

Other Windows and Frameworks

Settings for typical quickstart applications

Property	Location	Default Value
ConnectionString	%ProgramData%\Microsoft\ConnectionString.txt	
ProgramName	%ProgramData%\Microsoft\ProgramName.txt	Microsoft.VisualStudio
RootName	%ProgramData%\Microsoft\RootName.txt	
Internal Name	%ProgramData%\Microsoft\InternalName.txt	Microsoft.VisualStudio
Product	%ProgramData%\Microsoft\Product.txt	Microsoft.VisualStudio

Additional parameters for passing patient and user information to other applications

You can pass identifiers for the selected patient and current user to any quickstart application that will accept command-line arguments for them.

The patient identifier can be taken from any of the following database fields:

- `Microsoft.AspNet.Identity`
- `Microsoft.AspNet.Identity`
- `Microsoft.AspNet.Identity`
- `Microsoft.AspNet.Identity`

The user identifier can be taken from any of the following database fields:

- `Microsoft.AspNet.Identity`
- `Microsoft.AspNet.Identity`
- `Microsoft.AspNet.Identity`
- `Microsoft.AspNet.Identity`

When you specify an argument is not present in the selected program you must include the database field name until the value should be taken. This is done using the following convention:

`Microsoft.AspNet.Identity` `Microsoft.AspNet.Identity`

Where:

`Microsoft.AspNet.Identity` is the argument expected by the program. Examples: `Microsoft.AspNet.Identity` `Microsoft.AspNet.Identity`

It is one of the following values used to identify the database field:

Application Template Configuration

Other Windows and Mac OS X

- `NAME` is `templateName`
- `NAME` is `templateName`
- `NAME` is `templateName`
- `authorName` is `authorName`
- `authorName` is `authorName`
- `authorName` is `authorName`
- `authorName` is `authorName`
- `authorName` is `authorName`
- `authorName` is `authorName`

Example: `templateName` is `templateName`

This will use the value `templateName` as the parent identifier and the value `templateName` as the user identifier.

Configure a server layout in a quick test

1. Click the **Quick Tests** button.
 - (a) click **Template** - **Quick test**
2. Click **Yes**
3. In **Quick test type**, click **Server layout**
4. Select a server layout to add from the window layout list.
5. In **Comment**, enter a comment name to appear beneath the button on the **ReportView** view.
6. In **Shortcut key**, enter a key from the comment name to be used as a shortcut to select the button with the keyboard (optional).
7. Click **OK**.
8. When you finish testing configuring quick tests, click **Close**.

Note: Server layout are created using **TestRunner Manager**. **TestRunner** is a **Test Case Manager**. For more information, see the **TestRunner User Guide**.

Modify the properties of a quick test

1. Click the **Quick Tests** button.
 - (a) click **Template** - **Quick test**

The window shows all the quick tests currently configured for the pattern sheet.
2. Click the title of the quick test you want to modify.
3. To change properties such as the comment name or the shortcut key, click **OK** and make the necessary changes.

Application Template Configuration

Other Windows and Macintosh

- To change the position of a button both on the menu, click an arrow to move it up or down on the list. Click **OK** when you are in the upper corner of the application.

See Practice: Group your files by their type in the file menu and their name in menu.

- After you have finished configuring your menu, click **OK**.

Window Buttons

Windows contain commands for functions and windows integrated in the template.

The following list of buttons is given in Customer. Note that the windows do not correlate directly with the buttons.

Buttons/Windows	Description	Application/Windows Type
File Menu		
Log On/Off	Allows users to log on to and off of the system. Shows the log button on the menu. Cannot be removed.	All
New Window Button	Opens the window window for editing a record in one of the Record Window module. Selected record can be the active record in a window or a window.	Customer Care Manager / Phone Manager Windows only
New Record	Opens the window window. Shows user a window window in which is a different record. Cannot be removed.	Windows only
Transfer Record	Opens the window window with the record of a different window, but does not add the address in the Phone window.	All
Redisplay Record	Opens the window window with the record and adds the address in the Phone window.	All
Close Record	Opens the window window without adding the record.	Windows only

Configuration Item	Description	Configuration Requirement Type
Site Content	Shows or hides the site content depending on the site action context. Recommended for multitenant content sites. In multitenant applications, enabling a content page and content page tag controls access, using the content action action ID only. If multiple applications, the site action page the content action is shown in the Admin console window.	Not separately required
Product View	Shows the Product view	Not
Report	Shows the Report window	Not
Report List	This button is only available to user with role of administrator user. All messages should be used for report building. Shows the Report List window	Not
View configured user role assigned	Shows the user role profile	Not
Exit	Closes the application without saving the session. Cannot be removed	Not
Content no index	Shows content help window. Cannot be removed	Not
Reset	Displays message information, application context and the name of the template in use. Cannot be removed	Not
Additional		
Admin User	Not recommended for production environments	Not

Application Template Configuration

Other Windows and Frameworks

Application Window ID	Description	Application Framework Type
Events	Opens the Events window, which lists all events with associated events and sub-events.	JS
Web Events	Opens the Web Events window.	JS
JS UI	Opens the JavaScript Frameworks window.	JavaScript Manager HTML Manager Backend and Backend
Form Builder	Opens the Form Builder window.	JS
Resource/Resource/Resource	Opens the Resource/Resource/Resource window, showing the list of resources and related data.	JS
Quality Window	Opens the Quality window form.	
JS Manager	Opens the JS Manager window, which lists all quality resources, including those in the window and the window in the window in addition to the window in the window.	JavaScript Manager HTML Manager Backend and Backend
Resource	Opens the Resource window and displaying resource information, including those in the window and the window in the window in addition to the window in the window.	JavaScript Manager HTML Manager Backend and Backend
Resource/Resource/Resource	This window is only available when the window is an external web page in the window. Opens the Resource/Resource/Resource window form.	JS

System/Resource ID	Description	System/Resource Type
Advanced Order Registration	This button is only available when an order information is an external system is installed. Opens the Order Registration Registration window.	UI
Web Register	This button is only available if your system is integrated with CRM system. Opens the Web Register window.	Knowledge Manager Policy Manager Monitor and Workflow
Web Information	This button is only available if your system is integrated with CRM system. Opens the Web Information window.	Knowledge Manager Policy Manager Monitor and Workflow
Web Log	This button is only available if your system is integrated with CRM system. Opens the Web Log.	Knowledge Manager Policy Manager Monitor and Workflow
External System Setting	When system reports that are configured as external system, it is button set a system is not configured, users can apply it using the Apply System report button.	UI
New System ID	When user with appropriate system rights is used the system reports the recommended new production environment.	UI
Apply System Report	When user is apply system reports is selecting from the complete list of configured reports.	UI
Knowledgebase		

Application Template Configuration

Other Windows and Resources

Resource/Resource ID	Description	Application Resource Type
Resource	Opens the vCenter Server configuration window showing all configured services and documents how they are used in the vCenter environment with the vCenter tool. The vCenter configuration window also lists all services configured in the vCenter for their status.	UI
Subresources		
Feature Resource	Opens the Feature Resource window.	UI
Host	Opens the Host Editor window.	Policy Manager Virtual Host Manager Resource and Workflow
Monitoring Resource	Opens the Monitoring Resource.	UI
Planning Resource	Opens the Planning Resource.	
Planning Resource Resource	Opens the Planning Resource Resource.	
Workflow Resource	Opens the Workflow Editor window.	
Workflow Workflow	Opens the Workflow Workflow window.	Policy Manager Virtual Host Manager Resource and Workflow
Task Manager	Opens the Task Manager window.	Policy Manager Virtual Host Manager Resource and Workflow
Resource Manager and Workflow		

Configuration Type	Description	Configuration Requirement Type
Single Table	When used in add or update mode as a pattern step, without the table, users can only add/update entries using a default table. If they sign out, the default.	AC
Single Table Table	When used in download or single entry mode without having to add the table and download the entry separately.	AC
Table	When used in select mode if they are added to single or multiple entries.	AC
Table/Download	When used in download/multiple entries at one time. Without the table, users can only download/multiple entries individually from the download or select entry.	AC
Table/Print	When used in add/print as a pattern step.	AC
Table/Print/Print	When used in view selected entry with a print or go to print.	AC
Table/Print/Print	When used in view selected entry from a print as the whole print.	AC
Table/Print/Print/Print	When used in change the frequency of the report from default.	Default only
Table/Print	When a user can add the report entry from the list. The default of multiple entries is a report entry which can be added from other table entries.	Default only

Application Template Configuration

Other Widgets and Components

Configuration Type	Description	Configuration Restrictions
Emergency Off	When user is in an high-resolution device state from top-left to the screen edge	Mobile only
Search	When interaction with screen elements	Mobile only
Scroll	When user is change the device state configuration during a session	Mobile only
Top Right Bar	When is ready for the top-right bar display - includes action bar & other floating window controls visible from other mobile configurations	Mobile only
Mobile		
Tools	Buttons for getting custom data	Android through Mobile and Desktop

About Search Buttons

When you create a new application, the **Search** widget is added to a panel with an **Off** widget. It is automatically added to the **Mobile** view and the **Mobile** view.

The **Mobile** view can include up to 20 image buttons. You can create more than 20 panels, but only a portion of the buttons will be used as they fit on the screen.

About the Mobile View

The **Mobile** view shows custom buttons and operations that you configure as it also on the left side of the **Mobile** buttons for all panels. You can configure up to 20 custom buttons, including operations. If there are more than 20 buttons in one including more, small versions of some of the buttons will not be used as they fit on the screen.

About Tools

The **Tools** widget includes a library of some the standard functions and control actions. You can drag any item from the library to a custom button. However, these items are only visible to the function for which they were designed.

Configure Buttons

Note: Before configuring buttons, make sure that all the frames and page tabs (frames, window groups, programs) that you want are configured.

1. Show the **Buttons** button.

- a. **Show Template > Buttons**

The pane on the left displays button headings and all available commands for each button. The number next to a button name indicates the current status.

	Button is disabled in the frame. It cannot be removed.
	Button is not in the frame. It can be added.
	Button is in the frame. It can be removed.
	Button is in the frame, so it also appears in the Frame frame. (The number and heading of the button in the Frame frame can be set in the right pane.)

- a. Double-click an entry to add buttons to a frame in the frame.
- a. To add a button to the **Frame** frame, select it and then click the
 - i. In the window that appears, in **Heading**, enter the text to appear when the pointer is left over the button.
 - i. Click **Image** to select an icon for the button. The system prevents you from selecting the same icon for more than one button.
The button appears at the bottom of the right pane.
 - i. Select the button in the right pane and use the **Move** arrow to position it. The **Move** button will appear in the top left of the frame.
- a. When you have finished configuring buttons, click **Done**.

Note: The **Find** button appears automatically and cannot be removed or modified. The **Search Pattern** button is only available at runtime operations. Similarly, the **New Window** button is only available at runtime operations.

Set the properties of buttons in the **Frame** frame

1. Show the **Buttons** button.
 - a. **Show Template > Buttons**
2. On the right side of the window, select the button and then click **Edit**.
3. Set the properties as necessary.
4. Click **OK**.

- When you have finished configuring elements, click **Done**.

Removing buttons from the Home ribbon

- Click the **Buttons** button.
(Or, click **Template > Buttons**.)
- On the right side of the window, select the button you want to remove.
- Click **OK**.
- Click **Done**.
- When you have finished configuring elements, click **Done**.

Renaming buttons in the Home ribbon

- Click the **Buttons** button.
(Or, click **Template > Buttons**.)
- On the right side, select the button you want to rename and use the **Label** arrow to position it.
- When you have finished configuring elements, click **Done**.

Characteristics for ribbon buttons

There are a number of rules that can be added to ribbon buttons and listed in the following section:

Appropriate button characterizations

You can add new icons to the ribbon by adding graphics that in the ribbon. Graphics that must have the following characteristics:

- They must be in string format.
- They must measure 32 x 32 pixels.
- The background color should be #FFF (or, 255, 255, 255) and it is transparent in the application.
- They must have a dimension with the following format:

000000_000000

Where 000000 is any color Windows file name. In other words, specify RGB values and the underline character, as specified.

Note: The "0" in "0000" must be lower case. All other characters can be 0 to 9, a-z.

Example

```
00_000000000000_00000000
This area, 000000
000000000000_000000
```

Note To use, change the text of a placeholder within a template variable, which appears in the Windows task bar, all or large effect the actual content arrangement of each screen.

Workstation Configuration

About Workstation Settings

Workstation settings determine aspects of application behavior that are relevant to users, system administrators of the target host. Although Customer provides guides to user, VM configuration parameters, this manual only provides information about the user and VMs to help it correct use. For more questions, look other parameters, contact your VMware representative.

Workstation settings can be categorized as follows:

- **Basic workstation settings:** For more information, see [Basic Workstation Settings](#) on the next page.
- **Advanced workstation settings:** For more information, see [The Advanced Settings Window](#) on page 177 and [The Configuration Editor](#) on page 181.
- **Proxy Manager settings:** For more information, see [Proxy Manager Configuration](#) on page 181.
- **Guest file and network:** For more information, see [Guest File and Network](#) on page 183.
- **Guest file migration settings:** For more information, see [Guest Communication Features](#) on page 183.
- **Guest device configuration:** For more information, see [Guest Devices](#) on page 183.

Workstation Configuration

Basic Workstation Settings

Basic Workstation Settings

The window for viewing basic workstation settings provides access to a small number of essential settings in a controlled manner. Settings are made using check boxes, list options buttons,

Access Basic Workstation Settings

- 1 In the **Workstation** area, click **Basic Settings**.

Advanced Workstation Settings

Advanced workstation settings are accessed via the window, the Configuration Editor and the Advanced Settings window.

- 1 The Configuration Editor offers access to all workstation settings and includes advanced features like such as the ability to add new words, sections and images. Values are entered by typing them in fields.
- 2 The Advanced Settings window offers access to a particular group settings including those most frequently modified. It does not have the advanced capabilities of the Configuration Editor but it does give information about many of the settings and includes a set-friendly facility for entering into settings.

CAUTION: Advanced settings should only be changed by someone with a thorough knowledge of the Flex system. For any changes related to it is set in an **undocumented** settings. For help configuring undocumented parameters, go to contact your technical support representative.

Access the Configuration Editor

- 1 In the **Open** window, click **Open** next to **Configuration Editor**.

Access the Advanced Settings window

- 1 Open any window. It does not matter what one because the settings affect the workspace and the database.
- 2 Click **Workstation > Advanced Settings**.

Basic Workstation Settings

The following basic workstation settings are documented in this guide:

- 1 Descriptive fields to show in the Tables list and other descriptive settings.

For more information, see *Demographics and Patient Bar Workstation Settings* below.

- The type of screen is visible patient.
For more information, see *Screen, Patient Bar* on page 130.
- The type of automatic log off screen.
For more information, see *Automatic Log Off* on page 130.
- Whether a new patient data is displayed when no user is logged on.
For more information, see *Continuous Demographic Display* on page 130.
- How user names appear in the log off screen.
For more information, see *Log Off Screen* on page 130.
- Possible reasons for not log on with other workstation's patient.
For more information, see *Language Features* on page 130.

Demographics and Patient Bar Workstation Settings

You can set the demographic information to show, including the patient name on the Patient Bar. The report can include any combination of age, following, age, gender, weight, height, body surface area (BSA), body mass index (BMI), length of stay (LOS), and procedure. If age procedure has been modified, the procedure shown will be the modified one, not the original parent procedure.

Note: Only medical procedures with a functional age of "Primary" or "Surgical" are shown on the report.

Age procedure level demographic settings can be found on the **Language** menu.

- The order of the primary, first, middle, and last names on the Patient Bar and also list.
- The time limit for continuous demographic demonstration after age end of the encounter (after the period, only name with age, following, business, clinical, age can with data).
- The type of data that can be input forward from a previous admission record.
- The ability to input name, middle name, first, or middle name.

Note: Other settings on the Patient Bar are configured at the report level. For more information, see *Report Bar and Workstation Display* on page 130.

Note: Other demographic settings are configured at the report level. For more information, see *Demographics* on page 130.

Select Demographic Fields to Display on the Patient Bar

1. Go to the **Workstation** menu, and **Work Settings**.
2. Under **Patient Bar Fields**, select the demographic fields you want to display on the report.

Workstation Configuration

View Workstation Settings

1. View Status

Go to the link used for completing documentation:

1. Click the **Documentation Editor** button 
 - Go to the **Template** menu, click **Documentation Editor**
2. Click **Options**
3. In the window for setting the completing documentation box, select the link used for completing up your work.

The default link points to all hours. Templates have the number of hours to complete documentation at the Documentation window for the employee after a transfer or discharge (also the link of address are linked) comes with the **Storage Summary** window. (We can provide for link.)
4. When you have finished setting options, click **Close**
5. When you have finished configuring the Documentation window, click **Close**

Note: The setting also allows the ability to modify these same windows using **Print & Setup**. The window appears in the **Print** window. For this using documentation integration is not settings are available for completing documentation.

Go to the format of the address name on the Patient Box and the box

1. Click the **Documentation Editor** button 
 - Go to the **Template** menu, click **Documentation Editor**
2. Click **Options**
3. Under **Name Format**, click **First Middle Last Last**, **First Middle**, or **Last Middle**, **First**
4. When you have finished setting options, click **Close**
5. When you have finished configuring the Documentation window, click **Close**

Specify the data that can be copied forward from a previous admission record

1. Click the **Documentation Editor** button 
 - Go to the **Template** menu, click **Documentation Editor**
2. Click **Options**
3. Under **Copy Forward**, select the data that can be copied from all:
 - Patient address box
 - Hospital information
 - Home Medications

Notification Configuration

View Notification Settings

1. When you have finished editing options, click **Save**.
2. When you have finished configuring the Notification window, click **Save**.

Specify if these notifications will not be imported from an interface table

1. Click the **Notification Filter** button .
Go to the **Template** menu, click **Notification Filter**.
2. Click **Options**.
3. Under **Import Data from Interface Table**, select the **Interface Table Notifications** check box to allow the data to be imported.
4. Click **Save**.
5. When you have finished configuring the Notification window, click **Save**.

Note that data for interface table is always imported in "imported mode" as described in the following text.

Imported mode

In Imported mode any existing entries in the record are removed and replaced with entries from the interface table.

Example: A patient record initially shows two tests: **notification**, **Prescription filling and receipt**. A doctor opens a interface table and shows that the patient has not yet taken **Prescription** (e.g. field **date** has been specified for record, all only show a future notification of the patient). By then will be a notification of **Receipt**.

Access to Remote Patients

You can configure the type of access to remote patients.

Access Type	Access Type	Result
Remote	View Only	Full access to the patient at the local network workstation, view only access to all other patients.
Remote	Read/Write	Full access to the patient at the local network workstation, full access to all remote patients, no direct access to local workstation.
Remote	View Only	Full access to patients available in network only, view only access to all remote patients.

Workstation Configuration

Basic Workstation Settings

Automation Type	System Type	Event
Workload	Workload	Full events in a batch submitted in workload units; full events in all batched submissions

Note: There only have events in systems that are listed in the **Workload** window. Events for the **System** type in **System** window define the systems that are evaluated as a submission.

The **event type** determines the general kind of events in system events; **events** is specific. **Workload** depends on system type. For more information, see [System Types](#) on page 22.7.

For information on how to set up workload units, see [Change the Event Type](#), see [Create a batched submission](#), see [Create a workload unit](#) on page 22.7. For [Events in a batch](#) on page 22.7.

Set the type of events to create jobs

1. Go to the **Workstation** menu, click **Basic Settings**.
2. Under **Workload Pattern Events**, select the type of events to create a batch. The effect of the setting depends on whether you're configuring a workload or workload submission.
3. Click **Done**.

Automatic Log Off

Automatic log off is the period of time that "without loaded" at the workstation, which is a right or state when the system is idle for one hour. At the end of the period, a 15-minute countdown alarm during which a message is displayed to warn that any unsaved data will automatically be lost. When the countdown ends, a pop-up box of an agent notice warning with the state.

The value that you set also applies to **Flow Manager**. At workstations where **Flow Manager** is used as well as another mode - **Workload Manager**, **Control Center Manager**, or **Policy Manager** - you have 15 minutes in **Flow Manager** when the number is also other modes, you can save.

Set the automatic log off interval

1. Go to the **Workstation** menu, click **Basic Settings**.
2. Go to the **Automatic Log Off** row, select an interval.
To prevent the system from logging off automatically, set this to zero.
3. When you have finished setting the other parameters, click **Done**.

Unattended Workstation Display

You can specify whether or not system data is displayed when the user is logged on.

Note: The setting affects Proxy Manager as well as Authentication Manager, Policy Manager, and Virtual User Manager.

How often does user last log off?

1. On the Authentication menu, click **Basic Settings**.
2. Select the **How often does user last log off** as shown in the box.
3. Click **Done**.

Remote Access Behavior

The user information on the page of a user account that can be viewed using Remote Access, and the Authentication user fields.

GETTEXT 2 -- "Is it Remote Access from web application?"

Enabling the setting allows users to access accounts via the Remote Access window and control Remote Access to user after the user's account action changes internally between Proxy applications.

Best Practice: If you enable the setting, approve the "Use Remote Access" and "Use Remote" commands from the respective menu. When it is approved that they will not function.

The Advanced Settings Window

The Advanced Settings window provides access to hundreds of settings, the majority of which need manual changes. The manual describes the settings. If you need comments, visit the help configuring the product, please visit a user-defined support document box.

Workstation Configuration

The Advanced Settings Window



Make sure the names of settings, sections, and sections are up-to-date. They are always in English and the settings must then appear in Arabic.

In this guide, settings are shown in the following format:

File > Settings > Setting 1 > Setting 2 > Setting 3

Example: File > Settings > Setting 1 > Setting 2 > Setting 3 > Setting 4 > Setting 5 > Setting 6 > Setting 7 > Setting 8 > Setting 9 > Setting 10

Open the Advanced Settings Window

- 1. Click the **Advanced Settings** button  in the **Workstation** menu, click **Advanced Settings**.

Modify settings

1. Select the **File**.
2. Select the **Settings**.
3. Select the **Section** and click **File** or **Section** (if you are using).
4. Select a new value and click **OK**.
5. After you have finished modifying settings, click **OK**.

Messages and Prompts

These settings provide messages and prompts shown to users.

Example: You are not allowed to use this feature. Do you want to stop?

Do whether the system will prompt users for confirmation

Topic: [NotificationConfigurationAdvancedSettingsPage](#) - 1/2

The parameter determines whether users must confirm their actions after completing certain tasks. It also controls prompts for first and last-name administration.

Confirmation messages for the following actions can be suppressed:

- Creating treatments, standard orders, protocols, or schedules
- Deleting protocols, schedules, or standard orders
- Editing or changing protocols
- Describing an order in protocol
- Removing orders from a protocol
- Rescheduling orders
- Exporting orders
- Importing multiple orders
- Editing or updating a schedule

Values

1 = No confirmation prompts

0 = Confirmation prompts

Do whether the system will show the completion of tasks

Topic: [NotificationConfigurationAdvancedSettingsPage](#) - 1/2

The parameter determines whether a message is displayed after certain tasks are successfully completed with JDRules.

Example: Protocol was successfully created

Success messages 1 = be suppressed in the following situations:

- When creating a treatment, protocol, or standard order
- When editing a protocol

Values

0 = No completion messages

1 = Completion messages

Show or hide the highlight using the JDR's message

Topic: [NotificationConfigurationAdvancedSettingsPage](#) - 1/2

Customization Configuration

The Advanced Settings Window

This parameter determines whether an information message is displayed whenever a user provides or updates an entry that coincides with a past change.

0 = Show DDT messages

1 = Hide DDT messages

Setting the Color of Certain Features

These settings govern the colors of certain features in the GUI.

1. Background: The color of some user guide components may be large to add to get rid of any false signals.

Set the background color of text of range data values

Input: Integer, Range (0-255) (0-255) (0-255) (0-255) (0-255) (0-255)

This parameter determines the background color for the **Range** control in the Document or Subdocument Documentation window when the color is selected for reference only.

Value:

Any color

Set the background color of the window used for editing names

Input: Integer, Range (0-255) (0-255) (0-255) (0-255) (0-255) (0-255)

This parameter determines the background color of the window used for typing a name. It applies to all types of names. Note that it is only visible upon the name is entered and does not affect existing names.

Value:

Any color

Note: These color parameters in the window control window are obsolete and should not be altered.

Test Settings

1. Background: Although you are able to change text in the application interface using the test settings, these documents appear during a **Customized test** is not generated during **profile updates**. It is visible. This documentation refers to system files, comments and control window. Changes may be necessary to user and template profile support.

Starting in v2020 the settings app window is changed to test settings that first is often asked about this. Changing these settings is as up their test tab and are categorized in documents with the original test. To make test 10 needed and the updated test to make it better. It includes a software update.

Change the test to change from some others

Example: `testupdateTest: testupdateTest`

Each TestUpdateTest entry corresponds to a data entry. Check the test as required.

Example:

Example: `testupdateTest: testupdateTest`

Notes:

Any test entry

Documenting and Viewing Data on Flowcharts

These settings govern how data is documented and viewed in flowcharts.

Set the sort order of treatments in flowcharts

Example: `testupdateTest: testupdateTest`

Specifies the sort order of treatments. The behavior depends on whether family names are hidden or shown in the flowchart.

When family names are hidden: 1 = alphabetically by treatment name; 2 = by index. Sorting is alphabetical by treatment with the same index.

When family names are shown: 1 = alphabetically by family name and then treatment name; 2 = by family index and then treatment index. Sorting is alphabetical by family/treatment with the same index.

Notes:

1 = Default. When family names are hidden, sorting is alphabetical by treatment name. When family names are shown, sorting is alphabetical by family name and then by treatment name.

2 = When family names are hidden, sorting is by age treatment index. Sorting is alphabetical by treatment with the same index. When family names are shown, sorting is by family index and then treatment index. Sorting is alphabetical by family/treatment with the same index.

Set the fields to show in order descriptions

Example: `testupdateTest: testupdateTest`

The parameter determines which the selected test name is shown in the order description in flowcharts. The set of possible fields depends on the order type.

Notification Configuration

The Advanced Settings Window

Example

Example: `notification.enabled = true`

Values

1 = Flag set to enable description

0 = Flag not set to enable description

Set the ability to modify items in notification and feed entries

Example: `notification.modify.enabled = true`

This parameter determines whether users can alter the content items of a notification or feed or a forecast. If this option is active, the forecast entry, forecast, other users right-click a notification or feed item or a forecast, includes the **Modify Item** action.

Values

1 = Users can modify items

0 = Users cannot modify items

Set the ability to document a task with a description of work

Example: `notification.task.description.enabled = true`

This parameter determines if users can attach notes that have a description of work. This setting affects notifications and feeds.

Values

1 = Users can document tasks with a description of work

0 = Users cannot document tasks with a description of work

Display the details view for combined notifications

Example: `notification.details.notificationcombined = true`

This parameter determines if the details view for single dependent entries is displayed or hidden.

Values

1 = Flag set

0 = Flag not set

Set the default category for the Mail notification window

Example: `notification.mail.notificationcategorydefault = 0`

This parameter determines the default value for the Mail notification window.

Values

- 0 = All categories
- 1 = Documentary
- 2 = Documentary Methods
- 3 = Equipment
- 4 = Fluids & Gases
- 5 = Fluids & Solids
- 6 = Laboratory
- 7 = Mathematics
- 8 = Nursing & Health
- 9 = Reproductive
- 10 = Safety

Set the time limit for the test subscription for an order

Example: `SubscriptionPeriod, SubscriptionOrderSubscriptionPeriod = 12`

The parameter sets the time period that controls the subscription in the "Document Method Order" window which can also be copied forward. The test subscription that occurred within the configured period is shown for each window.

Values

Time in hours

Set the early documentation limit

Example: `SubscriptionPeriod, OrderTime = 1`

The parameter determines how long in advance of the scheduled time a user can document a test. If a user documents a test early, the recorded time of documentation is the current time, not the original scheduled time.

Values

Time in hours (Minimum = 1 hour, Maximum = 24 hours)

Set the order subscription period

To extend an order, users need subscription rights.

Example: `SubscriptionPeriod, SubscriptionPeriod = 100, 12 hours`

This parameter determines the period of time for which orders are extended. Orders are extended by either the first period or by the duration of the original order. Minimum is 1 hour.

Workstation Configuration

The Advanced Settings Window

Notes

Length of time in hours (Maximum = 120 hours (5 days))

Set the selected order flow limit

To restrict an order user must have sufficient rights

Input: `OrderManagement, OrderManagement, OrderManagement, OrderManagement` = 20

The parameter determines how long before or after the scheduled ending time user can submit an order. When a user clicks the **Submit** command a button only those orders to submit an ending time 10 within the designated number of hours from the current time is visible for selection.

Notes

Length of time in hours (0 = orders cannot be submitted)

Warning: To prevent users from accidentally submitting an order away. This document has not yet been added to a new flow or way to help the Order Submission Panel.

Set a time limit for documenting order

Input: `OrderManagement, OrderManagement, OrderManagement` = 20

If a scheduled task is documented well, the system prompts the user to add the remaining time to the time to complete the entire time. The parameter defines how long after the scheduled time user can document order without the prompt warning.

The default setting of 20 minutes is intended for users that document tasks as they perform them and is especially relevant for institutions.

The value should be increased if personnel tend to document orders more than one hour after performing them. In practice, if all orders are documented at the end of the shift, an appropriate value would be 60 minutes or more, but the value must be higher if users must investigate after documenting well.

Notes

Length of time in minutes

Set a documentation limit for finished orders

Input: `OrderManagement, OrderManagement, OrderManagement` = 20

This parameter determines the time limit for entering order after the end up a 100% order. The user is the scheduled time or the time of setting it was automatically.

Notes

Length of time in hours

Set the default wait time for orders

Topic: [Advanced Settings - AdvancedSettingsOptions - 1](#)

The parameter determines the default time shown in the **Waiting Time** column of the order screen. It affects the following:

- Single orders
- Standard orders
- Products are left at providers or unspecified during a session

Values

0 seconds (wait) - The number of minutes prior to the session wait time

0 - The wait time that the order is added

1 - The waiting time of the session

Values from 000 to 999 (e.g., 000 are not used and not allowed to -000)

Other data - [Open the default waiting time for orders screen](#)

Round the default waiting time for orders

Topic: [Advanced Settings - Round the Waiting - 1](#)

The **Round To Minutes** parameter is applied to orders when the default wait time for each order is the time that the order is added. This parameter determines whether the system uses the wait time in hours, minutes and seconds or rounds the time down to the nearest multiple of the parameter value.

Typical settings include 1, 5, 15, 30 and 60 minutes. For example, if the parameter is set to 15, the default waiting time of 15:07:00 would be rounded down to the nearest multiple of 15, or 15:00.

Values

0 - Round time in hours, minutes and seconds

1-60 - Multiple in minutes to which the default waiting time is rounded

Other data - [Open the default wait time for orders screen](#)

Set the default time for documenting a task

Topic: [Advanced Settings - Time Document - Time Document - 1](#)

The parameter determines the default documentation time supplied in the window **DT** is shown when a task starts a scheduled task. This sets the log collection time for the task at the current time when the task number was added.

Use the collection time if your document that ends up the end of a shift. Use the current time if your document ends up the center time.

Workstation Configuration

The Advanced Settings Window

Notes

0 = Scheduled task

1 = Custom task

Set the ability to extend continuous entries

Topic: [Continuous Entries](#), [Accessing the Advanced Settings Window](#) v 1.0

Continuous entries have no fixed end point after documentation starts, even yet continue to enter new information. For this reason, continuous entries are normally not included in the Project Output window. This parameter allows you to include open entries in the window so that users can access their information. Entering null as value will set automatic entries in the entry.

Notes

0 = Continuous entries cannot be extended (they are not listed in the Project Output window)

1 = Continuous entries can be extended

Set open entries to extend a description entry

Topic: [Continuous Entries](#), [Accessing the Advanced Settings Window](#) v 1.0

This parameter determines the action open entries request to extend a description or entry. By open entries can extend a description or entry if they have rights to document. Changing the setting forces open to have the same rights as they would add to entry the text. Also see [Using open a description entry when describing a subject in page 10](#) [PDF Documentation](#), [Topic: An Open Entry](#)

Notes

0 = Extension rights request a description entry

1 = Extension rights request an description entry

Set if new entries volume

Topic: [Continuous Entries](#), [Accessing the Advanced Settings Window](#) v 1.0

This parameter determines if default new entry volume that is available in the window after describing a field.

Notes

Series of entries is not supported by default task (0)

Set the entry description behavior of if field

Topic: [Continuous Entries](#), [Accessing the Advanced Settings Window](#) v 1.0

Determines whether or not the order description shows in the frontend changes when new volume, additional, additional amount, ship or amount fees, or other fee are changed during documentation of a final bill or final invoice.

Values

0 = Order description does not change (Default)

1 = Order description changes to reflect the most documented changes

Example

Original ordered order description: 100 units, 100 unit at 10 each or 10 units, 100
Additional: 100 units

Order description is volume of 100 units. Order description in frontend changes to the following: 100 units, 100 unit at 10 each or 10 units, 100 units, 100 Additional: 100 units

Set required ID number for final tags

Property: `idnumberrequired`, `idnumberrequiredproperty` = 0

This parameter determines whether or not an ID number must be entered when a final amount is documented in a system.

Values

0 = Not required

1 = Required

Set the number of decimal places in items and volumes

Property: `idnumberrequired`, `idnumberrequiredproperty` = 0

This parameter determines the number of decimal places that can be entered in a window used when processing a documentation modification in the system. The parameter affects modification items, final volumes, and other fees. The system displays up to the number indicated, rounding nothing more.

Values

A number representing the decimal places

Set the number of digits for recording frontend values

Property: `idnumberrequired`, `idnumberrequiredproperty` = 0

This parameter determines the number of digits to which values in frontend will be rounded.

Values

A number representing the number of digits

Workstation Configuration

The Advanced Settings Window

Set the ability to document items outside the reference range

[https://www.mimcor.com/Products/Software/AdvancedSettings/1-1](#)

The minimum and maximum range specified in order to indicate for modifications and flags has been added as reference values in text. If the system is configured to use reference items as text, users cannot document values outside this range. If it is configured to use open as reference values, the system identifies values that are outside of the range, but does not warn to document them.

Values

0 = Shows all values and flag items

1 = Shows all values and reference values only

Note: This parameter does not affect combined indicators.

Set the default flag family shown after processing identifier indicator values

[https://www.mimcor.com/Products/Software/AdvancedSettings/AdvancedSettings/1-2](#)

The parameter determines the flag family that is shown by default after processing values in the Single, Group, and Range flag family windows. Users can select "Other" and then choose a flag that this family is similar as part of a modification indicator.

Values

Any number from the [MIMCOR's](#) number table that is associated with a flag family. If set as the default value, the flag shown will not show "Other" by default.

Set the default flag shown after processing identifier indicator values

[https://www.mimcor.com/Products/Software/AdvancedSettings/AdvancedSettings/1-3](#)

This parameter determines the flag that is shown by default after processing values in the Single, Group, and Range flag family windows. Users can select "Other" and then choose the flag or another as part of a modification indicator.

Values

Any number from the [MIMCOR's](#) number table that is associated with a flag family. If set as the default value, the flag shown will not show any flag by default.

Assessments, Scores, Equipment and QIP Indicators

These settings govern the appearance and functionality of assessments, scores, equipment lists and QIP indicators.

Set the assessment bar height

[https://www.mimcor.com/Products/Software/1-4](#)

Workstation Configuration

The Advanced Settings Window

This parameter determines the number of response options that can be displayed in the Measurements, All indicators, and Equipment windows, increasing the number of items increases the length of the list which must scroll to see additional items that do not fit.

Value:

Number of items displayed = 40

[Set the measurements multi-selection option](#)

Parameters: **MultiSelect**, **MeasurementsMultiSelect** = 0

This parameter determines the checkbox control used to indicate that two or more options has been selected in the Measurements, All indicators, and Equipment windows.

Value:

Any checkbox

[Set the measurements table option](#)

Parameters: **TableOnly**, **MeasurementsTableOnly** = 0

This parameter determines the checkbox control used to indicate that a table has been selected in the Measurements, All indicators, and Equipment windows.

Value:

Any checkbox

[Set the temperature pressure for MPACMS](#)

Parameter: **MPACMSPressure**, **Temperature** = 100

The MPACMS pressure is based on various conditions, including the average temperature pressure. If your pressure is higher it is higher with all average temperature pressure that is different than the average pressure is selected (100 mm Hg, see above) and the appropriate value.

Value:

Local temperature pressure in mm Hg

Note: This setting may not affect device pressure, as this must be supplied and is calculated using the local temperature pressure, and temperature pressure value for device pressure. - Values must be entered directly in kg (kilogram) format in the DataLink software with the DataLink interface on page 100.

[Show equipment available in feedback](#)

Parameters: **Feedback**

Item: **Equipment**, **FeedbackItem** = 0

This parameter determines whether or not equipment items can appear in the feedback.

Workstation Configuration

The Advanced Settings Window

Notes

0 = Equipment items cannot appear in Feedback

1 = Equipment items can appear in Feedback

Show QR indicators in Feedback

Inventory, Feedback, Show QR Indicators = 0

The parameter determines whether or not QR indicators can appear in the feedback. (This parameter does not affect the QR indicators window.)

Notes

0 = QR indicators cannot appear in Feedback

1 = QR indicators can appear in Feedback

Performance Options Related to the Database

These parameters control how the application interacts with the data engine. The default values for these settings are configured to maximize performance, so that the application reads data from the server as infrequently as possible. However, if the network connection is not healthy, it may be necessary to increase the database read rate so that each workstation has enough data to work effectively.

Set the frequency of database reads

Inventory, Feedback, RefreshDatabaseFrequency = 10,000,000

This parameter determines the frequency with which the workstation automatically refreshes data from the rest of the shop.

The local workstation stores certain database tables in local memory after retrieving them from the data engine for the first time they are needed. New information in the main database is detected using FIFO, so that it can subsequently be retrieved by the workstation. In addition, the workstation automatically refreshes new information from time to time so that there is a constant rate FIFO. The RefreshDatabaseFrequency parameter determines how often this occurs.

The parameter is expressed as the rate of queries to data warehouse with the highest possible rate, 10. The workstation generates new data until the rate limit is reached, then the application reads it in. With the default rate of 10,000, the workstation refreshes new data from the main database once for every 1000 queries.

This setting has little effect on performance under normal conditions because the system communicates sparingly to the content of the main data as it must wait for new information.

Note: When the parameter is set in Advanced Settings the local requests to get information from shop data engine is independent of the language of the operating system it is used.

Settings: If you intend not to configure via the Configuration Editor the Customizer can default use the default separator settings in the regional settings.

Sample Values

- 0 = Date reflected once for every year (recommended setting when working with 60 frames)
- 0.1 = Date reflected once for every 10 quarters
- 0.001 = Date reflected once for every 1000 quarters (recommended setting for model sets)

Use system clock (default: open)

Value: `SystemClockType: RealTimePerformance = 0`

The separator determines whether the application reads all values in the data during entire refreshes, or just those corresponding to the current time slice.

Screen refreshes are faster when the system only reads or read a subset of age values for that modeling it shows intervals and change in the data over multiple the system to read a new group of events from the data set.

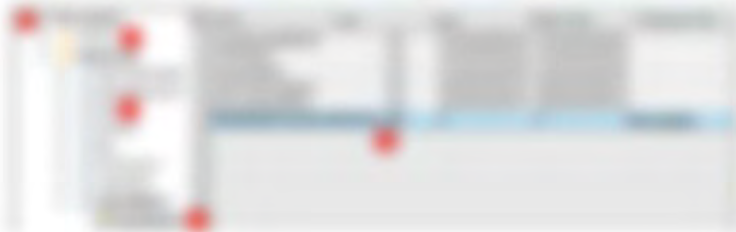
Notes

- 0 = System reads all scheduled values during entire refreshes
- 1 = System only reads scheduled from chosen interval

The Configuration Editor

Using The Configuration Editor

The Configuration Editor window provides access to all features that should only be changed by someone with a thorough knowledge of age system. The majority of settings read require changes. This manual describes the settings that are most commonly used.



1 Configuration editor

Workstation Configuration

The Configuration Table

- 1. Name
- 2. Type
- 3. Value
- 4. Default Value
- 5. Configuration ID

Each entry setting is an organizational unit called a "Workstation" Workstation functional group called "Group". Groups contain "workstation" entities and "workstation" entities. This is the set of workstation and group to show and get the same name from. When you select a workstation the entities are in the table in the right of the

Note: The names of workstations, groups, workstations, and entities are the same regardless of the workstation group. They are listed in the table.

Each workstation of a workstation, group, workstation, or entity indicates that the unit was added to the workstation configuration set.

Each of the workstation and group configuration is modified by the workstation configuration. However, in some cases you may need to add a new workstation, workstation, or group. There is a list of workstation entities you need to add to the workstation configuration set.

1. Workstation: The Configuration Table has a "Workstation" column. Changes are made to the workstation configuration. If the workstation set you are adding is not in the workstation configuration set, the workstation configuration set is the workstation configuration set.

Entry Details

Name	Type	Default Value	Value	Configuration ID
WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID
WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID
WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID
WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID
WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID
WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID
WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID
WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID	WorkstationConfigurationID

For each entry, you can see the following information:

- **Name:** Indicates that the entry was added to the workstation configuration set.
- **Type:** The entry type, such as workstation, group, workstation, or entity.
- **Value:** The value for the entry in the workstation configuration set.
- **Default Value:** The default value for the entry from the workstation configuration set.

Workstation Configuration

The Configuration Table

- **Configuration file:** The system is only allowed when the configuration file being used is "the machine configuration". The purpose of this is the system indicates that the only way that there is one of each of the configuration sets that allows the computer. The system shows the value from the set configuration set applied to the system file.

Example: For a particular setting, the set of values is 1. The value is changed to 0 in the machine configuration set to 0 in a configuration set that is applied to "Workstation 1". After making the setting in "The machine configuration" of "Workstation 1" will show the value 1, and the value of the configuration set which the value 1 was entered.

Note: Setting a system to an value is considered as an edit.

Note: The following actions will explicitly set the value to the current configuration set. The system that the value will not change if the value is either a system that configuration set (changing an entry and making **0** without actually changing anything) or the existing value that you previously edited in the same configuration set.

Example: For a particular system the machine configuration has a value of 0. In "The machine configuration" you make that the value was **0**. In the machine configuration the value is then changed to 0. When you then use "The machine configuration" you get 0, not 0.

The Machine Configuration

Each node in the machine configuration set has propagated to configuration set - which means there is a configuration set you can edit up from which values in values that you have modified are in the configuration set you do not see any value 0 - even set in the machine configuration. Similarly, each node in one configuration set are not propagated to any other configuration set.

In contrast, when working with "The machine configuration" you will see only nodes in all types that configuration set - the machine configuration set of configuration sets that are applied to the system. In the case of conflicting values, the value from the configuration set applied to the workstation is shown.

Example: A system parameter has a fixed default value. It is the machine configuration you change this to 0. This setting has not been edited in any configuration set so it is the local machine configuration. When? When you look at the parameter in a configuration set, it appears to you machine you see the value 0. When you look at the parameter in "The machine configuration" you see the value 0.

Setting and Modifying Items

There may be those who you need to make up machine or setting only, system or some in a configuration set. The difference between setting and modifying items are shown in the diagram

Workstation Configuration

The Configuration Editor

Table 8-1

Importing	Exporting
Imported settings appear as the configuration set you select.	Exported settings appear as configurations that can only be imported.
You can't import any settings, either as sets.	The Import command is enabled to help help users add as settings to the current configuration set. The menu for the default configuration that have made their settings to the current configuration set. The command is grayed out.
After importing an item you cannot add a new item of the same name.	After exporting an setting set you can add as item of the same name again.
An existing item is effectively "turned off" if the current item and equals "true" is.	If you delete an item that was added to the configuration set it is removed from the configuration set. If it is no longer added to the Configuration Editor when adding the configuration set.
2. Example: Importing to the setting, importing to the set will cause the set to be set.	If you click Import to remove an item from the default configuration that has been added the value will reset to the value entered when first set entered configuration set. The set will not be imported.
Imported items are shown in the set, only list.	Example: For a particular setting, the imported configuration has a value of 10. The existing configuration has a value of 10. The other configuration will not appear in the configuration. When you click the option to "This existing configuration" the setting remains made in the existing set and does not change the value of.

Exporting Settings to XML

You can export settings from a configuration set, which can be used to set the file. The file will only contain settings that have been added or added to the configuration set. For example, if you want to create a configuration set and then export it without having made any changes to it, the set file would be empty.

You can use the file, file in the following steps:

1. Open the file in a suitable editor to view the settings that have been made for the configuration set.
2. Import all settings from the file into another configuration set.

Workstation Configuration

The Configuration Editor

- Add and edit settings in the file using a suitable editor. Editing can be restricted for supported customers and then import all settings from the file into another configuration set.

Copying Settings Within and Between Configuration Sets

You can copy a single setting or setting to another position in the same configuration set or to a different configuration set.

Example: You want copy the settings section from the 4000 resource. **Resource = 4000, ID = 1**
Section = the 4000 resource. **Section = 4000, ID = 100000.**

Open the Configuration Editor

1. In the "Open" window, select the configuration set you want to work with in the Configuration Set list.

Note: You can also change to another configuration set using the Configuration Set control at the top of the Configuration Editor window.

2. Open the Configuration Editor from Open.

Note: By default, the Configuration Editor opens the configuration set that was selected in the "Open" window after opening Customer.

Change the Configuration Set shown in the Configuration Editor

By default, the Configuration Editor opens the configuration set that was selected in the "Open" window after opening Customer.

- To change to another configuration set, click the name in the Configuration Set drop-down list at the top left of the Configuration Editor.

Edit or modify the value of an existing entry

1. In the Configuration Editor, select the **World = Zone = Section** containing the entry you want to modify.
2. Double-click the entry.
A new window opens.
3. In **Value**, enter or modify the value for the entry. By default, you can choose between or edit the value you enter.
4. **Comment = Comment** enter or modify comment for the entry.

Note: Comments are only used by other parts of Customer. They do not appear in log files or reports.

5. Click **OK**.

Workstation Configuration

The Configuration Utility

Add a new entry, within a entry

1. In the Configuration Utility, right-click the parent element and select **Get Data - Add Section** or **Add Entry** as appropriate.
2. Enter the name of the new element.
3. If the element is an entry, click **Type** and select the "id" type from the drop-down list.
 - String of the value will be treated as text.
 - Boolean of the value will be True or False.
 - List of the value will be a multi-number of items.
(The value will be added items in a list, right-click the list and select the element comment.)
 - Index of the value will be an HTML code specification.
 - First of the value will be a first specification.
 - Age of the value will be a number up to 999999999.
 - Weight of the value will be a number up to 999999999.
 - Height of the value will be a number up to 999999999.
 - Double of the value will be a number up to 999999999.
4. Click **OK**.

Modify a entry, within a entry

For more information, see *Creating and Modifying Items* in page 1019.

1. In the Configuration Utility, double-click the element that you want to modify. (For entries and sections, you can also right-click the element and select **Get Data - Edit Section**.)
2. Select to edit.
 - The name of entry "entry" does the header check box.
3. Click **OK**.

Remove a single entry, within a entry

For more information, see *Creating and Modifying Items* in page 1019.

1. In the Configuration Utility, right-click the element that you want to delete and select **Delete**.
2. In the confirmation prompt, click **Yes**.

Remove multiple entries, within a entry

For more information, see *Creating and Modifying Items* in page 1019.

1. In the right pane of the Configuration Utility, hold down the **Ctrl** or **Shift** key while you click the items you want to delete. **Ctrl** allows you to select specific items, while **Shift** allows you to select an adjacent list.
2. Right-click and select **Delete**. (This command will be available if the selection includes any items that were added or modified in the current configuration set.)
3. In the confirmation prompt, click **Yes**.

Remove a user or service

Note: When working with a configuration set you are unable to remove a user or service that is part of the Infrared configuration. When working with the Infrared configuration you are unable to generate a user that is part of the Fire-affected configuration. In both cases, it can be a useful option to have a user that will be created instead with the name that you specify.

1. In the Configuration Editor, highlight the element you want to remove and select **File** > **File** > **Remove** or **Remove**.
2. Verify the name.
3. Click **OK**.

Remove an entry

Note: When working with a configuration set you are unable to remove an entry that is part of the Infrared configuration. When working with the Infrared configuration you are unable to remove an entry that is part of the Fire-affected configuration. In both cases, the Remove command is unavailable.

1. In the Configuration Editor, highlight the entry and select **Remove**.
2. In **Name**, type a new name.
3. Click **OK**.

Export all settings from a configuration set, with user or service

1. In the Configuration Editor, highlight the item entry which you want to export settings, and select **Export All**, **Export Work**, **Export Data** or **Export Settings**, as appropriate, and then select **OK**.
2. In **Filename**, type a name for the file or accept the default.
3. Click **Save**.

Export only the settings from a configuration set, with user or service that have been modified in the current configuration set

1. In the Configuration Editor, highlight the item from which you want to export settings and select **Export All**, **Export Work**, **Export Data** or **Export Settings**, as appropriate, and then select **Only Modified**.
2. In **Filename**, type a name for the file or accept the default.
3. Click **Save**.

Export settings from an IIR file

1. In the Configuration Editor, click **Export**.

Workstation Configuration

The Configuration Editor

Note: You do not need to select an element before importing. The IDE will specify the world, zone, and section for every setting in it.

1. Browse to the IDE file that you wish to import settings from.
2. Click **Open**.

Then you import settings from the IDE, the options are identical settings in the current configuration set.

Note: Imported settings are not immediately visible; you need to click **Set** to merge the configuration editor database to use them.

Copy a zone, section or entry to another section in the current configuration set

1. In the Configuration Editor, right-click the zone, section or entry that you want to duplicate and click **Copy**.
2. Right-click the world, zone or section where you want to paste the copied item and click **Paste**.

Note: If an item of the same name already exists you will be shown a message asking if you want to overwrite the file. Clicking **Yes** will do this. **No** or **Cancel** clicking **No** will create a new ID for item with the suffix "1".

Copy a zone, section or entry to another configuration set

1. In the Configuration Editor, right-click the zone, section or entry that you want to copy, click **Copy** **to** and then select the name of the configuration set you want to copy the entry to.

Note: If an item of the same name already exists you will be shown a message asking if you want to overwrite it. Clicking **No** will cancel this operation.

The item will be placed in the same structure as the item being copied.

Search for a setting

You can use the search facility to find world, zone, section, settings, or values.

1. In the Configuration Editor, click **Find**.

Note: You do not need to select an element before searching. The search will always commence with the first of the worlds.

2. In **Find to what** type the text you want to search for.

Note: The search finds matches that contain the text, not just exact matches.

Note: The search is case insensitive. If you enter "gold" the search will also find elements containing "GOLD".

Workstation Configuration

The Configuration Table

1. If you want to testing using regular expressions, enter the regular expression and make sure the **Test as Reg** test has a valid expression. For more information on regular expressions, see <http://en.cppreference.com/regex/regular-expressions/>.
2. **Use Host Name**
If **Host** is found the world, some section is setting will be highlighted. Otherwise, a message will be shown.
3. To search the name matches, click **PS**.

Log On window

You can configure the log on window as shown in the Log On window.

User details

Name	Host	Section	Entry
Host	Host	Security	authentication:login
Available Values			
A log default, authentication is used for logging on.			
A. authentication is used for logging on.			
A. authentication is used for logging on.			
A. authentication is used for logging on.			

User details

Name	Host	Section	Entry
Host	Host	Security	authentication:login
Available Values			
Host - the user details to login.			
Host - the user details to login.			

Note: If authentication:login is set to use a host ID then the authentication:login parameter is not used the user ID is always with registration of the user.

Workstation Configuration

The Configuration Table

Drop-down list of parameters

Group	Item	Section	Entry
Group	Item	Security	DownloadParameter
Parameter Values			
Value – is drop-down list box of parameters is available, users can select a value from the list, the type is same as the default value. Not All Available – is drop-down list box of parameters is not available, then that type parameters is the default one.			

Note: In **DownloadParameter** is set to use a **File** or **DownloadParameter** type is set to read the user that the **DownloadParameter** parameter is set, set is drop-down list is given direct registration of the setting.

Discharge Reasons

You can specify whether or not each app able to create discharge reasons 'or not'. When the parameter is set to **With** the window shows that a patient is discharged all rights in **App Type** button that shows user is enter a new discharge reason.

Note: If an user use with a new discharge reason while discharging a patient that discharge reason will have automatically be entered in all applications.

Group	Item	Section	Entry
Group	Item	Discharge Reason	Show all discharge reasons
Parameter Values			
With – is give users the ability to add a discharge type after discharging patients. Without – is show users the ability to add a discharge type after discharging patients.			

For more information, see **Discharge Reasons** in page 100.

User Name in Title Bar

You can specify whether the Title Bar shows the username or actual name of the logged-in user.

Group	Value	Section	Setting
Group	Group	Security	ShowUserPasswordTitle
Possible Values			
True – The user name is shown in the title bar			
False – The user name is not shown in the Title bar			

Change Password Button

You can configure whether or not the **Change Password** button is shown in login windows. If Windows Service Authentication is used it will never be visible regardless of the setting.

Group	Value	Section	Setting
Group	Group	Security	ShowPasswordEditApp
Possible Values			
1 – The Change Password button is available in login windows			
0 – The Change Password button is not available in login windows			

Clinical Note Export

The Clinical Note Export has the ability to export a note only file with an automatically generated filename to a specified location and then notify the user via an EIT message. You can configure the following:

- ▶ The default network folder where files will be exported to.
- ▶ The file format.
- ▶ The naming convention for the file.
- ▶ Whether the file is exported automatically when a note is finalized or when an attendee is saved for a finalized note or manually when the user clicks the **Send** button.

Name	State	Location	Rating
Amesbury City	Massachusetts	Amesbury Mall (exit)	Good (exit 10)

Previous Values

It is not an internet site.

Example: Amesbury Mall (exit 10)

Example: Amesbury Mall (exit 10)

Name	Type	Version	Binary
AmberTools-1.6.0	AmberTools-1.6.0	AmberTools-1.6.0	AmberTools-1.6.0

Available Values

This combination of up following variables are used:

Variable	Description
name	Name of the variable
type	Type of the variable
version	Version of the variable
binary	Binary of the variable
name	Name of the variable
type	Type of the variable
version	Version of the variable
binary	Binary of the variable
name	Name of the variable
type	Type of the variable
version	Version of the variable
binary	Binary of the variable
name	Name of the variable
type	Type of the variable
version	Version of the variable
binary	Binary of the variable

Workstation Configuration

The Configuration Editor

Procedure: Values

Base Procedure: To convert unique file naming strings into the structured variable.

Example: 2016/10/10/101

Configure the format for reported values

Module	Base	Section	String
Anesthesia	Anesthesia	APR/AnestReport	Report/Anest

Procedure: Values
Tip: Values are reported in APR format.
Note: Values are reported in APR format.

Configure automatic report of values

Module	Base	Section	String
Anesthesia	Anesthesia	APR/AnestReport	Template/AnestReport

Procedure: Values
The value of each string value depends on report you select when asked in the template in the automatically reported value fieldset. The cell indicates the cell selection.
Note: To add cell in table below is a list, right click the cell and select the value you want report. After that value will be available for value report in any template not in the list. Then you can click to modify report the value if they want to.

Maximum Patients per Anesthesiologist of Record (Concurrency)

You can specify the maximum number of patients that each of the Concurrency Module can able to range in an anesthesiologist of record. If all are not attempt to range then patients a report message will be shown and the user will be prompted for confirmation of the action.

Note: Depending on the anesthesiologist will show a value any limitation in warning message in the Message Task demographics Module after you anesthesiologist of record is

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Month	Days	Section	Topic
April/June	10/10/2020	10/10/2020	Mathematical Language of Events
Previous Topics			
No image			

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Form	Form	Form	Form
Form 1	Form 2	Form 3	Form 4

LogoutTask

- You can configure LogoutTask to log the user off when a session timeout is reached.
- You can hide the Logout button to prevent users from pressing it.

Configure LogoutTask to log off after session timeout

Name	Value	Section	Policy
LogoutTask	LogoutTask	Configurations	LogoutTaskLogoutTask
Available Values			
True	LogoutTask will log off the user when a session is closed.		
False	LogoutTask will not log off the user when a session is closed.		

How to hide the Logout button in LogoutTask

Name	Value	Section	Policy
LogoutTask	LogoutTask	Configurations	LogoutTaskLogoutTask
Available Values			
True	The Logout button is shown in LogoutTask.		
False	The Logout button is not shown in LogoutTask.		

Monitoring Results Window Default Sort

Monitoring results are sorted by Time collected by default. You can change the default sort order.

Name	Value	Section	Policy
Monitoring	Yes	Monitoring	MonitoringDefaultSort

Notification Configuration

The Configuration Editor

Available Values

- 1 - is sent by the "testemail" account
- 2 - is sent by the "test" account
- 3 - is sent by the "testemail" account
- 4 - is sent by the "testmail" account

Configure laboratory data to show

You can specify how far back from the current date to show laboratory data.

Range	Days	Section	Days
testemail	1000000	testmail	1000000

Available Values

Any integer number of days. The default is 10 days.

Also see the similar setting for *Prescription Manager* (see *Storage Configuration*, at page 22) of the *Prescription Manager* and *Photo Manager* - a typical setting would be 10 days.

The *Virtual Case Manager* - a typical setting would be 100 days (see page 10).

Best Practice: If notifications about user logins need to be shown, patient data are *Discharged* patients. This recommendation setting this is similar to its maximum value of 10000 user means 10 years.

Template List

You can configure templates list to be shown to end users when they access records as follows:

- If a *testmail* notification when viewing the chart of a patient located at another *testmail* notification or at a *testmail* notification.
- If a *testmail* notification when viewing the chart of a patient located at a *testmail* notification or at another *testmail* notification.
- When viewing the chart of a patient who has been hospitalized.
- When viewing the chart of a patient who has been discharged.

Workstation Configuration

The Configuration Table

Group	Item	Section	Value
WorkFlow	Yes	WorkFlow	WhenTemplateIsNotAvailableInTheSystem
Template Values			
True is False default.			

When set to True, the template selection window opens and lists all templates available in the system. The user selects a template to use for opening the record.

When set to False, the template selection window does not open. Instead, the template applied to the user used for the last session of the record that is being opened. If the template is not available in the local machine the default system template will open instead.

External Order Notifications

You can configure whether or not to give notifications for new external orders in the Notifications window separated from the Orders list. For more information, see [Orders, the new Notifications](#), Section on page 121.

Note: This is a template specific setting.

Group	Item	Section	Value
Features	Template profile, 01	Application	Applies to all external orders

Example

For the General Workflow template you need to set this setting to the 01, 01 value.

Template Values			
True is no order notifications.			
False is yes notifications.			

The Default System Template

It is a number of values described elsewhere in this guide; the default number is zero. Settings for this template are found in the [Features > gen_01](#) area. You can customize your settings at any configuration level.

Workstation Configuration

The Configuration Editor

The best way to change the default template is to select another template and having the set of properties as this. The only other way to edit it is by directly changing settings in the Configuration Editor.

How the default template or another template

1. Download the template you want to use as a base for the default template.
2. In the Configuration Editor, import the **Template** + (name named) corresponding to the template.
3. Open the imported file. It is a editable editor and replace the code with with you.
4. In the Configuration Editor, import the settings from the file.

The exporting and importing of settings is described in The Configuration Editor on page 107.

Report Configuration at the Template Level

You can configure the table structure where Oracle Reports report files are located and where report PDFs are saved to. You can do this globally using the Editor or locally using Customized. For more information, see Reports on page 110.

Best Practice: Make the report file path different to the report save path.

Name	Type	Section	Value
ReportDir	Report path, or	Customized	ReportDir: the table where report files are stored. ReportDir: the table where reports will be stored to.
Example Values			
The path path is a shared table.			
Note: Regardless of whether a path is defined globally or locally, the path field can be edited only as a global. For example, a global setting could be 'C:\ProgramData\Oracle\Reports\'. Users need 'write' access to the report save path and 'read' access to the report file path.			

The global option stores its reports, see Reports on page 1.

Report Configuration for Proxy Manager

The proxy commands

You can configure the **ReportDir** and **ReportDir** field command to appear on the File menu.

Workstation Configuration

The Configuration Table

Note: Only one "File" tab should contain the **Reports** built command to appear in **File Manager** and integrated with report building to performed using **File Manager**.

Name	Icon	Section	Setting
File	reporting	Report	effectiveness for the Reports command effectiveness for the Reports built command
Available Values			
True - The command is shown in the File menu.			
False - The command is not shown in the File menu.			

Folder locations related to reports

You can configure the folder locations where report files are located and where report files are saved to. You can do this locally using Customization as described here, or globally using **File Manager** for folder options related to reports. See **Customize** on page 115.

Best Practice: Make the report file path different to the report save path.

Name	Icon	Section	Setting
File	reporting	Customization	ReportPath - the folder where report files are saved Reporting - the folder where reports will be saved to
Available Values			
Any valid path to a folder location			
Note: Regardless of whether a path is defined globally or locally, the path itself can be either local or remote. For example, a global setting such as "C:\ProgramData\Health\Reports\New" would mean "local" applies to the report save path and "local" applies to the report file path.			

Patient Summary Export to the HES

You can enable users to send abbreviated Patient Summary reports to the HES - see **Configure the different available report types**. All report types are shown in add users in a drop down list.

Workstation Configuration

The Configuration Editor

Patients Summary reports app is **OFF** (disabled).

See the "Report Report" command in the Patient Summary window.

Header	Form	Section	Form
InsertPage	OFFReport	Report	InsertPageReportForm
Properties: Report			
True	The command is available in the Patient Summary		
False	The command is not available in the Patient Summary		

Create report type

1. Add a new section command **ChangePage = OFFReport** to the report type.

See Practice: [How the section works in an existing report type.](#)

2. Name the section "ReportReport".

When **OFF**, **ON**, **OFF** report type appears in the order in the Patient Summary.

3. If necessary, change the order in the report of other "ReportReport" sections to adjust their order.
4. Select the section and insert it into the order in the right pane.
5. Double-click **Report** and enter the name of the report to be added in the Patient Summary.
6. Double-click each part of the following section: set up them as True or False as appropriate. Data type set as True will be displayed.

InsertPageReport - appropriate data table and identifier data table.

Page,OFFReport - full patient information.

ReportForm,OFF - instructions, facts and action protocols.

ReportForm,OFF - diagnosis and instructions.

OFFReport - patient summary table.

InsertPage - notes.

InsertPageReport - comments and words.

Auto Adjust Fluid Volume Setting for Infusion Pumps

The infusion rate (drops of an infusion pump) matches the infusion rate shown in **Infusions** (table). However, as far as the total infused volume is concerned, you may have had a slight discrepancy between the total shown at the pump and in the application. (The discrepancy depends

Workstation Configuration

The Configuration Editor

in the other workstation. In such situations, with existing functionality, users can make manual volume adjustments as necessary. Alternatively, devices using a suitable coefficient above 0.1 can also have sets of user-adjustable volume adjustments. This can be the required freedom to alternate volume adjustments.

The configuration is set using the Configuration Editor. Note that this setting does not need to need to be manually created in an entry of type "Volume".

```
workstation: workstation  
workstation: workstation  
workstation: workstation  
workstation: workstation  
workstation: workstation  
workstation: workstation
```

Note: If this configuration setting does not need to be done, and the user has been set to 0, then the program is designed to default value of 0.000. Note that in previous releases, when the workstation was not configurable, the value was a value of 0.000.

Example

Volume = 0.000 unit

Volume (unit of)	Workstation setting calculated in program	Difference (1.0 percentage)	Auto adjust volume?
unit	0.000	0.000	0
unit	0.000	0.000	0
unit	0.000	0.000	0. user-adjustable volume in program (user level is 0.000)
unit	0.000	0.000	0
unit	0.000	0.000	0
unit	0.000	0.000	0
unit	0.000	0.000	0. user-adjustable volume in program (user level is 0.000)

Note: In order to use the functionality, a suitable coefficient above 0.1 can be set for the required work in operation. At this time, with a device is used for the other workstation settings. If you will want to use the functionality with an external work that another is collected, please consult your local representative.

[illegible]

The configuration is set at the program level using the Configuration Editor in Explorer.

These cells are groups of neurons that are typically interconnected together forming columns. They are often used to solve the most important in structural analysis problems (1) are designed for 3D problems, such as that of a cantilever beam, where one end is fixed and the other end is free. The other end is free to move in the horizontal direction and is connected to a spring.

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The process for creating an event topic is the same as for creating an event set, but you can configure the topic to perform an action after adding the events, such as creating a new comment or applying a comment label.

Note: An associated event is included in an event set. It is only added to the Events log if the event set is added to the pattern that is in use with the TMS view and that system log.

Create an event set

1. On the **Workstation** menu, click **Event Sets and Topics**.
2. Click **New** to enter a name for the event set.
An event set event set is used from the **Available Event Sets** box.
3. In the **Type** box, select an event type. Then select one or more events of that type in the **Available Events** box and click **OK**. Repeat this step if you want to add events of a different event type to the event set.
4. Use the **Move** arrow to move a highlighted event in the **Selected Events** box to a new position. Events are listed in the order in the Events column.
5. To remove an event from an event set, click the event in the **Selected Events** box and then click **Remove**. (This does not delete the event from the event set.)
6. Click **Done**.
7. When you have finished creating event sets, set event names, click **Done**.

Configure an event set as a topic

1. On the **Workstation** menu, click **Event Sets and Topics**.
In the **Available Event Sets** box, select an event set.
2. Click **New**.
3. If you want to create an event set to enter a date and time for the events, click **Through the date and time when inserting events**.
4. You can configure the topic to perform an action after inserting the events.
To apply a comment label, click **Apply comment label** and select a predefined comment label from the list.
To associate a comment set, click **Associate comment** and select a comment from the list. Comments are only associated if they also appear in the corresponding name. See **Comments**, on page 111.
5. Click **Done**.
6. When you have finished creating event sets and topics, click **Done**.

Delete an event set or topic

1. On the **Workstation** menu, click **Event Sets and Topics**.
2. In the **Available Event Sets** box, select the event set/topic you want to delete.

Notification Configuration

The Configuration Editor

1. [View Email](#)
2. [View SMS](#)

Device Communication Features

There may be situations in which the program stops receiving device data during a session. This can occur because of problems with device connectivity or system configuration. If an internet error is the application, you can configure the system to notify users after a certain period with no new data from one or more devices. The application stops as a warning identifying the user number and device for a problematically device and can also send an instant message or support staff the help resolving the problem.

Configure the system for device communication failure

1. Go to the **Notification** menu, click **Device Data Interruptions**.
2. In the **Intervals without data** box, enter the number of data collection intervals to wait before displaying a warning message for the application.

The parameter determines how long the system waits to notify users after it stops receiving data from devices. The delay is based on the **Frequency Data Interval** frequency of automatic data collection. To calculate the length of the delay in minutes, multiply the **Frequency Data Interval** by the value of **Intervals without data**.

Example: Intervals without data setting of 3
 If the **Frequency Data Interval** is 1 minute, the delay would be 3 minutes.
 If the **Frequency Data Interval** is 5 minutes, the delay would be 15 minutes.

3. In the **Message to display for application** box, you can edit the text of the message that users see.

Note: Do not enter content when typing the text, any text input after you press enter does not appear when the message is shown.

4. If you want the system to notify support staff automatically by email, do the following:
 - Click **Notify support staff by email**. This enables the **Email Details** set and up buttons at the bottom of the page.
 - In the **Mail server** section, specify the mail server.
 - In **Seconds before automatic email notification**, enter up delay before the system sends an email message automatically.

The parameter determines how long the system waits to send the email message after displaying the indicator message. When you enter zero the message immediately for the indicator message window or add any the system to send the message. When you select a message when prompted to confirm the action.

 - For each person who should receive a notification, click **Add** and then enter the person's email address.

Workstation Configuration

Census Windows

- To add or delete an email address, select it and then click **Add** or **Delete** as appropriate.
- Only email **Results** are type as **Email subject** and **Email body** as appropriate.

Note: You can use the following variables to add the subject and body:

SurgeID: The surge ID that is used, followed by the full description in brackets.

Department: The department description.

DepartmentID: The computer ID tag.

Unit: Full name as the register is used.

- When you have finished, click **Done**.

Note: Connections to the DPM3 server are automatic; a modem is not required.

Census Windows

Overview

This window is a list of census census windows for displaying patients in Healthcare Manager, Public Manager, College Care Manager, Power Manager, Community, and the Provider window. The window displays patients by admission status, or else you can display different patient groups. Selected patient records can be added to document presentation lists, and a search. See also the census user documentation.

A window typically allows a user to select from different groups of records, such as the following:

- Transfer patients: Patients who have been transferred from one bed and are awaiting admission to another.
- Discharged patients: Patients who have been discharged from the floor unit because they have left the hospital or been transferred to a non-PAC unit. These patients can be admitted or added.
- Selected patients: Patients currently admitted to beds. These patients can be viewed but cannot be admitted to a unit.



Figure 1. Windows Update service. The authors and users working around in the Windows Update Task. The service window can be opened by clicking on the icon in the taskbar.

You configure service windows using WPF Administrator, as described in the next section.

WPF Administrator

If you belong to a user group with the 'Full Manager' right, you can use WPF Administrator to configure service windows. The Windows Manager, WPF Manager, Windows Task Manager, Group Manager, Credential and Password.

WPF Administrator service has functions:

- It is used for WPF operations.
- It is used for configuring service windows.

This guide focuses solely on the use for configuring service windows. For other use or using WPF Administrator for WPF operations, please see the Administrator user guide.

Before customizing a service window, you should consider the following issues:

- The types of patterns you want most users to use and which type to use most frequently. For example, window, button, tab, etc. (also, transitions, and dialogues).
- Whether this resource pattern sets for the WPF or their user only.
- What pattern information should accompany the sets. For example, Figure 10, such as text color, starting position, target description or unit rate, diagram or protection name, pattern type.

Workstation Configuration

Service Windows

Service Name	Service	Port
Form Manager	FMG	FormManager
HealthStream	HS	HealthStreamService
API (AccessPoint)	API	AccessPoint
Product		
This service window affects the Forms Builder service in Business and the Reporting Wizard application.		
See Product: To activate the service for the the window above, I patients that are identified in some community identified and are able to use this in real. This document that are created as additional services for with related set of patients such as "Community Healthcare Provider" and set it as the default service for the window.	Health	Product

Creating Queries for the Patient Groups

Each patient group service type is associated with an SQL query that defines the selection criteria and the object list to return for each patient. The query for the most frequently used patient group can be configured as the default.

You can use the default service for queries that are associated or create your own. With the exception of the query used to select the HHS, you can also modify the service for queries that are provided.

- 1. Select HHS:** You should not modify the "Select query HHS" query.
- 2. Select HHS:** You "Select results" query must always include the following data selection in the HHS table:
 - HHSID
 - HHSID
 - HHSID
 - HHSID
 You cannot use the data table ID, ID or ID for the other tables.

There must be an SQL statement for each patient group that is available to users. There is no limit to the number of patient groups that can be created, but each database must have at least one.

an **SQL** statement defines the selection criteria for patients and the information is returned by them. The desired way to create an **SQL** statement for a query is creating queries and results by an expert is query writer another window. Do not attempt to write an **SQL** statement yourself unless you are a database administrator with extensive knowledge of how a database structure.

Rules for creating and editing queries

Q queries can represent a list of patients (one row per patient) or a list of answers for patients with one row for each answer.

- If you plan to use the various window for displaying answer questions with answers returning query is a table, the first column display one row per patient. The first field in the **SQL** statement must be the **PERSONID** or **PERSONID**. This applies to the **Genomic** window window.
- If you plan to use the various window for displaying answer questions to show different information in the various applications, the first column display one row for each answer. The first field in the **SQL** statement must be the **ANSWERID**. The queries in the various window at a hospital application other viewing record patients **Genomic** and in the various window at a hospital application **Genomic**.

The first field in any **SQL** statement is used for record identification purposes only and is not displayed in the patient list.

The statement must include fields for all of the columns in the results list in the same order that list in **SQL**.

Create a new query

1. Open a various window as described in **SQL** applications on page 275.
2. Click **New**.
3. In the **Title** box, enter a name for the patient group. The text is displayed in the **Genomic Type** box in the window.
4. If you want to apply the new query by default, select the **Default Query** check box.
5. Click **OK**.
6. In the **SQL Statement** box, write a **SQL** statement that returns the desired information. Remember that the columns for displaying query results for answers fields in the **SQL** window must list in **SQL** in the same order in the statement according to the **PERSONID** or **ANSWERID** field. For example, if the first field in the statement is the **PERSONID**, the first column of the patient list shows the ID.

SQL a query

1. Open a various window as described in **SQL** applications on page 275.
2. In the **Title** box, click a query in the and then click **SQL**.
 - a. Double-click the query name.

Workstation Configuration

General Workflow

1. In the **SQL Statement** box, add the query to arrange the selection, set grouping criteria, filter the patient and admission information, order on the admission, or the visit order for the day. Remember that you cannot use database query result for database type in the query editor, and set to null, if this can be defined in the statement constructing the **PROVIDERID** or **ADMISSIONID** field. For example, if the first table in the statement is the **UNIT** table, the first column of the patient list shows the **UNIT**.

Query in query

1. Open a service window as described in **SQL Administration** on page 235.
2. In the **Filter** box, click **in query** name.
3. Click **Query**.
4. Enter a name for the patient group. This text is displayed in the **Service Type** box in the window.
5. If you want to apply this new query by default, select the **Set as Query** check box.
6. Click **OK**.

Insert in query

1. Open a service window as described in **SQL Administration** on page 235.
2. Click **Insert**.
3. In the **Window** box, click the **Filter** configuration panel that contains the service window with the query you want to insert. Then click the window name in the **Table** box.
4. Select a query and click **OK**. The query is inserted.
5. Click **OK**.

Remove in query

1. Open a service window as described in **SQL Administration** on page 235.
2. In the **Filter** box, click **in query** name and then click **OK**.
Or, double-click the query name.
3. In the **Table** box, click the query name. This text is displayed in the **Service Type** box in the window.
4. Click **OK**.

Configure in query to be applied by default

1. Open a service window as described in **SQL Administration** on page 235.
2. In the **Filter** box, click the name of the query you want to apply by default and then click **OK**.
Or, double-click the query name.
3. Select the **Set as Query** check box.
4. Click **OK**.

Delete a query

1. Open a server window as described in [SQL Administration on page 235](#).
2. In the **Tables** box, click the name of the query you want to delete.
3. Click **Delete**. The query is deleted.
4. Click **OK**.

Customizing the Patient List

The patient list displays the query results in a multi-column list. To customize the part of the server window you view in the listview:

- The **query** query, not to be confused for using field that is displayed in the query results. (The field table in the **SQL** statement is used for server identification purposes only, and is not displayed in the patient list.)
- Resize the text for using column heading.
- Set the width of each column.

Set up a patient list

1. Open a server window as described in [SQL Administration on page 235](#).
2. In the **Tables** box, click the name of the patient group.
3. Click the **New patient list** in the **Database** box.
4. In **Database Header**, enter the list is display about the column.
5. In **Column Width**, enter the width of the column in pixels.
6. Click **OK**.
7. When heading appears the results as often as you like. If you want to change the column header or adjust the width, click the column name and right-click **OK**.

Columns must be listed in the same order as the corresponding fields in the **SQL** statement.

Change the position of a column

1. Open a server window as described in [SQL Administration on page 235](#).
2. In the **Tables** box, click the name of the patient group.
3. In the **Database** box, click the name of the column.
4. Click the **Move to top** button to move the column to a new position.

Sort a column

1. Open a server window as described in [SQL Administration on page 235](#).
2. In the **Tables** box, click the name of the patient group.
3. In the **Database** box, click the name of the column.

4. User Icons

Customizing Buttons and Other Controls

You can include buttons for up to 11 API functions in a custom window. Custom windows typically 0 up buttons for a few major functions. Custom windows for system diagnostics, such as the API Administrator custom window, may include buttons for all of the major functions.

You can also customize the following elements in the custom window:

- Test dialog box in the title bar of the window
- Test label above the Connect Type list box
- Test of the Close button
- Standard API functions

Add a button to a custom window

1. Open a custom window as described in [API Administrator on page 115](#).
2. Under **Buttons**, click **Add**.
3. In **Button ID**, enter the button identifier for the button you want to add.
4. In **Label**, enter the text to display on the button.
5. To configure the button as the default button for the window, select the **Default Button** check box.
The default button can be activated in the custom window by pressing **Enter**.
6. Click **OK**.

For further information on page 115, see information about the functions associated with using buttons.

Add the text of a custom window button

1. Open a custom window as described in [API Administrator on page 115](#).
2. Under **Buttons**, enter the button name in the **Button ID** column.
3. Click **Add**.
4. In **Label**, add the text to display on the button.
5. To configure the button as the default button for the window, select the **Default Button** check box.
The default button can be activated in the custom window by pressing **Enter**.
6. Click **OK**.

Change the order of buttons in a custom window

1. Open a custom window as described in [API Administrator on page 115](#).
2. Under **Buttons**, enter the button name in the **Button ID** column.
3. Click **Up** or **Down** to move the button to a new position on the list.

Buttons are displayed in the same order as the canvas window.

Buttons in Canvas Test or Canvas Window

1. Open a canvas window as described in [API Administration on page 115](#).
2. Under **Buttons**, enter the button name in the **Button ID** column.
3. Click **Save**.

Buttons Test in a Canvas Window

1. Open a canvas window as described in [API Administration on page 115](#).
2. In **Buttons**, enter the test to be displayed in the title bar of the Canvas Test window.
3. Click **Workstation Settings**.
4. In **Canvas Type Tests**, enter the test type for the Canvas Type test.
5. In **Canvas Button Labels**, enter the test label for the Canvas button.
6. Click **OK**.

Buttons Test for Test and Buttons Labels in all Canvas Windows

Test labels for tests and buttons are the same for all canvas tests in the workstation.

1. Open a canvas window as described in [API Administration on page 115](#) and page 11. At the end of the test, you can use the settings you will make apply to all canvas tests at the workstation.
2. Click **Workstation Settings**.
3. Enter the test to display for a test and buttons.
4. Click **OK**.

Testing and Saving Configured Canvas Windows

You can preview the canvas window while working. This allows you to verify that questions are successfully read from and returned to, and that test is order is correct.

When you are satisfied with a window, you can save it. You can also save a window with a different name to replace another canvas window.

Test the configuration

1. Click the name of a patient group by selecting its name in the **Canvas Type Test**.
2. Click **Test**.

Note: If a patient group is a patient list, **Reorder** is shown the test for each group when testing a canvas window.

Workstation Configuration

General Workflow

Save the workstation configuration

- If you are manually configuring the workstation, click **Save**.
The configuration is saved automatically.
If you wish to save the changes without saving the workstation, click **Save**.

Save the workstation configuration for use with a different application

Note: Some of the buttons listed in the workstation window are not currently supported: **RequestPrescription**, **RequestPrescriptionPrescription** and **TransferPatient**.

1. After you have finished configuring the workstation, click **Save As**.
2. In the **Save As** box, add the appropriate file name configuration used by the application. Type and the workstation name in the **Save As** box. For a list of workstation names, see [List of Workstations](#).
3. Click **OK**.

Button Reference

This table shows the common workstation buttons that can be configured.

Button (shortcut & keyboard key)	Description
NewPatient New Patient	Creates a new record and adds the patient to the workstation.
NewPrescription New Prescription	Creates a new record and adds the patient's address status to Prescription .
TransferPatient New Patient Patient	Transfers the selected patient to the workstation.
Prescription Prescription	Makes a prescription record with the selected patient.
TransferPrescription Transfer	Transfers the patient's address and changes the patient's address status to Transfer .
DischargePrescription Discharge	Transfers the patient record and discharges the patient from the Prescription .

Workstation Configuration

Product Viewer workstation settings

System property & Registry key	Description
ProductViewer New User	Shows a context menu without changing the user's address value
ProductViewer Address	Refers to the ID for the selected address group
ProductViewer WebSiteAddress	Shows a homepage link
ProductViewer Change Address	Changes the context of an address
ProductViewer New Address	Shows a new address value
ProductViewer Use Address	Shows the new address as value
ProductViewer Apply Log	Shows the Apply log

Product Viewer (workstation settings)

The section describes workstation-level product settings. The workstation-level workstation settings are described in the following table. The following settings are available.

The options

- You can define the default display time to be used when an address is selected "current use" as the period is an address. This setting applies to all product models.
- You can specify the display period available for each user to select when creating a product - Address, Day, Week, Address, and Custom. This setting applies to all product models.
- You can specify the location of user history after which a product model that is open for setting in the Workstation Product Model is automatically saved.

Workstation Configuration

Product Name: workstation settings

General printer settings

- The **using printer model** can be set to the actual type (PDF reader is not). The PDF printing can not operate for Windows format. (in network mode too.)

Default printer settings

- The **use printer** is default printer model and a default drawing format. Types defaults are represented when a user creates a printing.

Configure the start time for "normal day" printing

1. Click **Workstation > Product Name Configuration > General**
2. Set to **Default start time for normal day**, select **00:00** > **Start time of first work**

Configure the drawing periods available for each user

1. Click **Workstation > Product Name Configuration > General**
2. Set to **Included drawing periods**, select using drawing period (If you want to be available)

Configure the software license for Customer/Printer/Builder user

1. Click **Workstation > Product Name Configuration > General**
2. Set to **Business printer model** (initial), select a value. After the amount is set, mapping the printer to printer model that is used for setting in the Customer/Printer/Builder will be automatically done.

Note: This setting also applies to the configuration of quality resources.

Configure print output type

1. On the **Workstation** menu, click **Product Name Configuration**
2. Click **General Printer Settings**, select **printer model**. (The list shows the printer model listed in the configuration on the user and currently setting.)
3. Click **Output Type**, select **Printer Built-in File (PDF)**.
If you select **Built-in File (PDF)**, you must also configure the format, format and output resolution. You can also optionally configure the PDF to be output whenever the PDF is generated by selecting **Output to PDF**.
4. Click **Thumbnail Format**, type **format to use for thumbnail**.
Thumbnail type list, use the following variables in order to create unique thumbnail.
(Note that these variables are not case sensitive.)

Thumbnail variables

PDF: Print type (PDF)

Automation Configuration

Product-based automation settings

Note: By default, if a value field not used for a variable it will be represented by the word "null" in the console. You can specify an alternative string to be used in such situations by specifying a value for the `ternativeNotUsed` field in the first part of the variable's command.

Example: If you want the word "No Product" to be used whenever there is no value for the `productId` variable, use the following expression: `productId: No Product`.

1. Under **Test Network Path**, enter the path to a shared network folder where PDFs will be generated.

Example: `\\Printer\pdf\Products`

Note: There must write access to the configured folder, and it needs to be available when configuring. The software will not let you start the configuration if it does not allow the agent.

2. Click **OK**.

Configure the default product settings

1. Click **Automation > Product-based Configuration > General**.
2. Set **Default Model** when the model is set as the default.
3. Set **Default Printing Method** when the printing method is set as the default.

Note: If defaults are not set, and none of them is when the system model and printing method start printing.

Automated Product Automation settings

You can configure products to be created automatically, based on a printer. This is built as specific rules, only a specific structure (e.g. name) is based on other system information or system data, events occur. Each combination of settings is referred to as an automated product instance.

Note: When products are created automatically, no printer is assigned to the job. For the system, automatic products are also referred to as "ghost products".

Create an automated printing instance

1. On the **Automation** menu, click **Automated Products**.
It works very as the following example:

Automation Configuration

Product Master automation settings



2. In the bottom of the left pane, click **Full Automation** option.

Enter settings in the right pane as required.

3. Under **Product Master Selection**, select a product type.
4. Under **Trigger**, select a trigger type. **Flow Schedule**, **Windows** or **API Event**.

The controls in the **Trigger** pane change according to the selection.

Note

In the **Starting** box, enter the time you want the product to be generated. You can select from the time in 15 min interval (eg. 15:00) or add the exact number and give a value.

Automation Configuration

Product-based automation settings

Schedule	In the Schedule menu, enter the time that you want the first printout of the day to be generated. The next setting specifies the time an additional printout (e.g., 10:00) is added. The third option you add is the: In the Interval menu, enter the interval between printouts in hour and minutes. Future two printouts will be created at the Scheduling time you first enter with interval until the end of the day is reached. Example: In the Scheduling time is 9:00 and the interval is 3 printouts will be created at 9:00, 12:00 and 3:00. Note: If you only want one printout per day, enter a large interval value that the end of the day will be reached before the next printout can occur. (For example, interval of 10:00.)
Shutdown	This is the Shutdown menu that you can enter a shutdown event.
WiFi Setup	This is the WiFi Setup menu that you can enter a WiFi setup.

- Under **Scheduling Period**, select a time range to be printed:
 - Choose for a predefined range such as Current Weekdays, Every Wednesday or Current Day.
 - Choose Shutdown to set specific days and time range. (For age setting, you can "set specific the day number in the current day (1st = today, 2nd = yesterday etc.)
 - Choose Shutdown to enter period number in the printout time, such as the age in hours. (For this setting, you can specify hours and minutes.)
- Under **Report to**, select a report type (Phone, File, or Email & File).
The contents in the **Report to** will change according to the selection. The settings are the same as those available after configuring the Printer Module. For more information, see [Configure and select print on page 105](#).
- If you want the printout reported to the file, select **Report as PDF**.
- Click **OK**.

How will Module or Module is automated printing network

- In the **Automation** menu, click **Automated Printouts**.
- To view the configuration settings for all existing automated printout instances, select the instance in the left pane.
- To edit the configuration settings for the selected instance, click **Edit**.
- To enable the selected instance, click **Enable**. (The icon is enabled if it is also found by selecting the instance and clicking **Enable**.)
- To delete the selected instance, click **Delete**.

Preop Manager Configuration

About Preop Manager Configuration

Customer interface is used for configuring the behavior and appearance of corresponding operations. The default system user configuration after using the tool is to enable content in the system corresponding to some of critical features, general operations, all documents and workflow items. For more information, see *Preop Manager* on page 100.

Note: Preop Manager configuration settings are not dependent on updates.

Note: If Workflow Manager or PMS Manager are being used with Preop Management™, then Preop Manager should not be used and you should not change any settings in the Preop Manager configuration.

Note: The automatic logoff period (the period of inactivity before the application logs off automatically) is controlled by a systemwide setting for all the "virtual monitor" applications. For more information, see *Automatic log off* on page 100.

Open the Preop Manager configuration window

1. Open Customer: Open *Starting and Ending Customers* on page 100.
2. In *Configuration* tab, click a configuration set. See *Configuration Sets and Workflows* on page 100.

Pragm Manage Configuration

Pragm Evaluation Sections

1. Start in Pragm Manage Configuration with Open

Pragm Evaluation Sections

This section covers the following functionality:

- Select sections to include and configure their order
- Change a section title
- Configure fields for each section
- Lock sections after a section is changed

Select sections to include and configure their order

Here is list of possible sections and the Workstation (see Table 1)

1. Click the **Basic Configuration** tab.
The current configuration is shown in the **Selected Sections** box.
2. To add a section to the summary, in the **Available Sections** box, click the section label and then click **OK**.
3. To remove a section from the summary, in the **Selected Sections** box, click the section label and then click **OK**.
4. Use the mouse to move a highlighted section in the **Selected Sections** box to a new position. Sections are listed in this order in the Pragm Manage summary.
5. When you're finished, click **Done**.

Note: The terms "Pragm Forecast" and "Pragm Evaluation" are identical. The only reason to include both in Pragm Manage would be if they were used by different programs to build projects and then needed to avoid generating duplicates.

Change a section title

1. Click the **Basic Configuration** tab.
2. In the **Selected Sections** box, click the name of the section you want to edit.
3. Click **Edit** to open a window showing the existing title.
4. In the **Section Title** box, enter the new text.
5. Click **OK**.
6. Click **Done**.

Configure fields for each section

1. Click the **Basic Configuration** tab.

Prescription Manager Configuration

Prescription Evaluation Section

1. In the **Selected Section** box, enter the name of the section you want to edit.
2. Click **Setup** to open a window showing all available data elements for the section.
3. In the **Name** column, click the name of a field you want to configure:
 - To include the field in the section, select the **Include** check box.
 - To remove the field, clear the check box.
 - To configure the field to display data but not permit data entry, select the **Read Only** check box. (You should only set a field as read only if data for it will always be provided automatically from the HED feed or from a downstream flow log. Prescription Manager is limited to the HED log.)
 - To allow data entry, clear the check box.
 - To display the field data but not include a field label, select the **Hide Title** check box.
 - To display a label before the data, clear the **Right** box.
 - To display data in descending order, select the **Reversed** check box.
 - To make the field optional, clear the check box.
 - To change the unit label, click the **Unit** button, enter the new text and click **OK**.

Link sections after a patient discharge

The setting controls whether or not the following sections are linked after the patient is discharged:

- Home Evaluation
- Hospital History
- Recent History
- Prescription History
- Test Measurements
- Physical Exam
- Treatment Plan
- Tests & Results
- Past Patient History

Note that neither setting determines whether sections display with the Summary page module or linked. See the [Linking to the HED log for connecting demographic documentation](#) on page 1237.

1. Click the **Basic Configuration** tab.
2. Select the **Link sections on patient discharge** check box.
3. When you give feedback configuring Prescription Manager, click **Done**.

Note: This recommends that the using preventative integration after setting if using records for discharge patient.

Required Data

The system uses the following functionality:

- Configure required data related to diagnosis and prevention
- Configure required data in the prevention and action
- Configure required data in the affected information section
- Configure required data in the method status section
- Review that up-off when required data is missing
- Review that up-off when required data is missing

Note: In Pega Manager, a set identifier must exist for each set of required data that has not been entered.

Configure required data related to diagnosis and prevention

In Pega Manager, `set1` specifies the functional type (Pega, Manager, etc.) and clinical priority (high, moderate, or unknown) for each diagnosis and prevention that is entered.

In Customer, you can configure that a specific functional type is required. For example, if you configure that a Pega functional type is required for diagnosis, then a test and diagnosis must have the functional type Pega.

You can also configure that a required functional type must be accompanied by a certain clinical priority or a test and diagnosis/prevention. For example, you can specify a functional type of Pega together with a clinical priority of Primary.

1. Click the **Basic Configuration** tab.
2. In the **Selected Sections** box, select the section that contains diagnosis and prevention.
3. Click **Help**.
4. Click **Diagnosis** or **Prevention** (depending on what is used).
 - A window appears showing each functional type and its possible clinical priorities.
5. To specify a required functional type, select the corresponding radio check box. To implement specific ID, the functional type must be accompanied by a certain clinical priority, select the corresponding check box (ID is).
6. Click **Done**.

Example: The following example shows the functional types "Pega", "Manager", and "Pega/Manager" and functional type the user can select the associated clinical priority: "Primary".



Configure required apps in the webhooks page section

1. Click the **Basic Configuration** tab.
2. In **Selected Sections**, click the name of the webhooks page section.
3. Click **Setup**.
4. To display apps to document the subject's **git** app, select the **git** app required app icon.
5. In **Required Subscriptions**, select the check boxes next to the subscriptions that must be completed for every action.
6. Click **Done**.

Configure required apps in the physical examination section

1. Click the **Basic Configuration** tab.
2. In **Selected Sections**, click the name of the physical examination section.
3. Click **Setup**.
4. In **Required Subscriptions**, select the check boxes next to the subscriptions that must be completed for every action.
5. Click **Done**.

Configure required apps in the medical history section

1. Click the **Basic Configuration** tab.
2. In **Selected Sections**, click the name of the medical history section.

Proxy Manager Configuration

Quick Links, Toolbar Buttons and Menu Commands

1. **Start Setup**
2. In **Required Substitutions**, enter the check boxes next to the substitutions that must be completed for each action.
3. When you're finished configuring Proxy Manager, click **Done**.

Remember: Proxy Manager also requires site to monitoring.

1. Click the **Basic Configuration** tab.
2. Enter up to 40 required site must be entered before that request must be.
3. When you're finished configuring Proxy Manager, click **Done**.

Quick Links, Toolbar Buttons and Menu Commands

The toolbar supports the following functionality:

- Configure a quick link application for the Proxy Manager toolbar
- Provide a toolbar button for creating, updating, deleting, and restoring
- Provide a button for creating a dynamic report profile

Configure a quick link application for the Proxy Manager toolbar

Note: You can use the buttons highlighted that it is to configure up to five actions. Each button allows you to configure one action. Click action 1 to configure the first action, open the button 2 to the second action, and so on.

1. Click the **General Settings** tab.
2. Under **Toolbar Configuration**, click button 1 and then do the following:
 - In **Location**, enter the path to and name of the webtable file.
 - Select a graphic for the toolbar button and click **OK**.
 - Select the **Toolbar Item Check Box** and then click **Remove**.
 - In **Toolbox**, select the tool to drag to, enter the user name the toolbar uses to log toolbar button.
3. To configure another action, click button 2 and repeat the steps in step 2. Use buttons 3, 4, and 5 for additional actions, as necessary.
4. Click **Done**.

Best Practice: If using ProxyManager Manager, ProxyManager is a virtual Proxy Manager is also used at the toolbar bar. Configure a quick link for it as location, enter the path to the toolbar icon file.

1. Click the General Settings icon.
2. Click the Print Patient Worksheet button.
3. Click Done.

1. Click the General Settings icon.
2. Click the Print Worksheet Header button.
3. Click Done.

Note: Print Manager always includes a Print Evaluation command on the File menu. This command is used to print the current patient worksheet. The formatting is controlled by an XML data sheet and the content is preconfigured. It cannot be changed in Print Manager. Always use the command in Print Manager to print the printout.

Note: In contrast to Print Evaluation, Open Worksheet Header is used to create a printout with formatting and content defined by a printed worksheet and the contents of the worksheet itself. If configured to be shown in Print Manager, it only appears in the main window. When it is not shown the entire the Printout Header window appears allowing the user to select a printed sheet to use for printing.

You can configure the following menu commands to be shown on the File menu:

- New Patient
- All Information
- New Evaluation
- 1. Click the General Settings icon.
- 2. Click the relevant Show /> checkbox.
- 3. Click Done.

Note: If Evaluation Manager or Print Manager are integrated with Print Participation™, then Print Manager should not be used and you should not change any setting in the Print

Import configuration

You can set the ability to import the following data from an interface rule into Proxy Manager:

- **Name notifications**
- **Real address history**
- **Suggested history list**
- **Physical event list** (including real objects)
- **Test and results data**

Note that data from interface rules is always imported in "suggested mode" as described in the following box.

About Suggested mode

In Suggested mode any existing entries in the report are removed and replaced with entries from the interface rule.

Example: In Proxy Manager, a pattern report already shows two Name notifications. Parameterized History and Map to. If another pattern or interface rule that shows that the pattern rule can select Parameterized Map to data has been imported the proxy report will only show a Name notification of Parameterized Map to. There will be no indication of Negatives.

Example: In Proxy Manager, a pattern report already shows an object in map to. If another pattern or interface rule that does not have any objects, the data has been imported the Proxy Manager report will not show any objects.

Configure the ability for users to import data from an interface rule

1. Click the **Open Interface Rules** tab.
 - Click **Name Notifications** to allow this data type to be imported from an interface rule.
 - Click **Real Address History** to allow this data type to be imported from an interface rule.
 - Click **Suggested History** to allow this data type to be imported from an interface rule.
 - Click **Physical Event List (Real Map to)** to allow this data type to be imported from an interface rule.
 - Click **Test and Results** to allow this data type to be imported from an interface rule.
2. Click **Close**.

Simultaneous Proxy Manager Configuration

This section covers the following functionality:

- Choose the patient identification number to display in the MR list
- Configure monitoring data to show
- Configure the ability for users to copy data from one workstation to the next
- Monitor users to log on before starting the application
- Enable printing or not after a printout request is added

Choose the patient identification number to display in the MR list

1. Click the **General Settings** tab.
2. In **Select ID Source**, select a patient identifier field to use as the patient identifier in the Proxy Manager MR list. The user chooses from the following:
 - MRN (MRN, MRN, Comprehensive Patient Record, Patient ID, Patient ID)
3. When you have finished configuring Proxy Manager, click **Done**.

Note: The setting you make depends on the identification number used by your hospital and how the identifier would be field and used. For example, if you do not display the Medical Record Number and this is a value in the PTHP field, you would choose PTHP.

Monitor users to log on before starting the application

1. Click the **Basic Configuration** tab.
2. Select or clear the **MR login required to use Proxy Manager** check box.
3. Click **Done**.

This feature is intended for the situation where a user has been automatically logged off.

Configure monitoring data to show

This setting determines how the user for the current data to show monitoring of the MR.

1. Click the **General Settings** tab.
2. In **Range of monitoring data to display**, select how the user for the current data to show MR MR data.
3. Click **Done**.

See also the online setting for **Worklist Manager**, **Print Manager** and **Printed Proxy Manager** Configuration Monitoring data to show on page 225.

Page Manager Configuration

The Page Instructions Manager

Instructions are: If your identification number displayed in the header of the presentation screen.

Instructions are displayed in the user for diagnosis or procedure.

Instructions are displayed in the demographic form.

Instructions for the patient selected in the presentation instructions form.

Instructions regarding medications selected in the home medications form.

1. Customize the tool

Go to **Formatting** and go to **Tools** and go.

From **Options** go to **Header** and the **Header** page.

2. Save the file

Note: Do not change the margins of the tool page itself as that margin are controlled by Internal System settings as described next.

Change the page margins

When the Page Instructions Manager is opened it will use the margins that are configured in Internal System **File > Page Setup**. The default margin size is 0.75 inches.

If you change the margins in Internal System it will only affect documents created by IT and changes are saved in the following registry key:

`HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\PageSetup`

Change the default margin size for all users of a workstation

1. In the registry, create a new value **PageSetup** under `HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\PageSetup` with the values that you want. The best way to do this is as follows:

Go to the margins you want in Internal System **File > Page Setup**.

Go to the registry and export the following registry key:

`HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\PageSetup`

When you export it has a name of "reg" file is the file that you designate.

Go to the reg file in Windows, replace the key `HKEY_CURRENT_USER` with the key `HKEY_LOCAL_MACHINE` and save the file.

Go to the registry key file in Windows. This will load the new key file into the registry.

2. Create the **PageSetup** key for the current user. (This will ensure that settings under the user Machine key are used when creating a print).
3. Restart users and to change page setup settings in Internal System. (Otherwise a new **PageSetup** key will be created in the registry for the current user and the settings will

Proxy Manager Configuration

The Proxy Manager interface

Inside the web machine where `ProxyManager` is installed, you can access the UI using either by visiting a http url to access the `ProxyManager` app, or the direct url with the `ip` and `port` as:

DB Editor Overview

The DB Editor contains all of the content related to device configuration parameters for Policy Manager, Troubleshooting Manager, Policy Manager, and Critical Path Manager. The DB Editor contains content related to the configuration of the DB Editor. The DB Editor provides access to content related to the DB Editor and provides a view of the content.

Use the DB Editor to work with the following items:

- Troubleshooting content including troubleshooting capabilities, instructions, tools, user activities, content, routing, and network.
- Troubleshooting content.
- Content for the package for DB Editor and Troubleshooting content.
- Content.
- Troubleshooting content, instructions, and activities for content.
- Content for user activities in Troubleshooting and Policy Manager content, also lists of the tool, Troubleshooting, and Troubleshooting, instructions, and activities for user activities.
- Content for troubleshooting capabilities.
- Troubleshooting capabilities.
- Policy Manager, Troubleshooting Manager, Policy Manager and Critical Path Manager content, and Troubleshooting.

DB Editor

Starting and Quitting DB Editor

- Configuration is needed to start or quit DB Editor.

Starting and Quitting DB Editor

Now that after this program is the user verification request for the user right DB Editor is being used.

You must have the system right DB Editor is used with the application. In addition, you must specify access rights to work with different types of database content.

Database content	System right needed to edit content
Database content	Order Superuser Options
Users, user groups, authentication/authentication rights	Order Accounts Manager tool

Note: This is a detailed explanation with extensive knowledge of the Priv system should use DB Editor. Changes made using the tool affect the behavior of the entire Priv system immediately. Any unwanted change must be reversed in reality.

When working with DB Editor, set the attribute to set the `PrivEditorPrivability` to 1 using Customer as described in the section for the frequency of changing content at page 10. Remove the parameter in the normal setting when you are finished using DB Editor.

Start DB Editor

1. Click **Start > DB Programs > Priv System Utilities > DB Editor**.
2. Enter a valid user name and password to log on to the system.

Note: If your system is configured to use Windows Secure Authentication, the **Change Password** button is disabled and a window for changing the **Default** may be present.

Quit DB Editor

- **Quit DB**

Changes to saved automatically.

OE Editor Interface

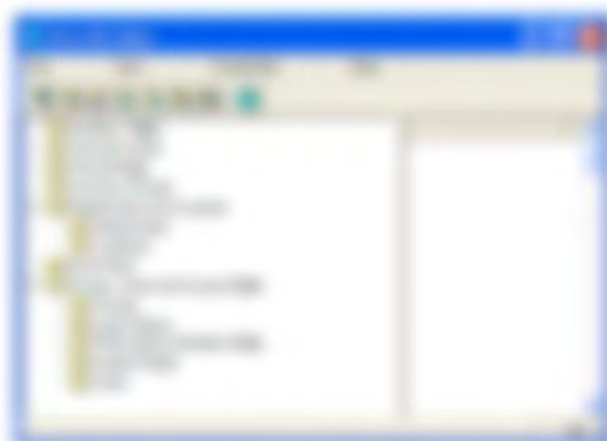


Figure 1. The OE Editor interface is a standard “tree-lookalike” system.

The left side of the application window shows folders containing items that can be modified. The right side of the window shows the contents of the selected folder. If you double-click an item on the right side of the window, a dialog starts or a table for editing the item opens.

OE Editor window features content in five main editors:

- **Available Tables** Standard table that a user selects from top when entering information in application window and content screen. If the system is configured for administrative interface only, table are hidden — the functionality can instead be found in OEDB pages.
- **Change Content** Screen related to user activities that can be described by a pattern. These include modifications, fields, assessments and records protocols and all components associated with them.
- **Change Notes** Provides functions that a selected user modifies an pattern in a suggested procedure and the affecting table associated with each step.
(For more information, see [Change Notes](#) on page 221.)
- **Database Structure** List of all diagnosed procedures, modifications, or changes that is used most frequently in different parts of the database. Window shows a short list with only those items for each selection. Users can “left click” to search for more frequently used items if needed.
- **Departments and user lists** Display departments that use the OE Editor system, and locations that connect specific activities to each.

(For more information, see [Change Departments and Patient Locations](#) on page 221.)

DB Tables

Auxiliary Database Tables

- **Groups, Users and Access Rights** – User groups, users, system rights and permissions information. If your system is configured for federative integration, this table is not present – the functionality is inherited by users in IBM Security Manager.

For more information, see *Groups* on page 201 or *Users* on page 201.

- **Incidents** – All incident log as “Event” entries with an event in the database instance.

Auxiliary Database Tables

The **Auxiliary Tables** section provides access to key database tables. These tables were initially provided without consideration of the software, or by abstracting key data from other information systems during implementation. DB Tables are also used with terms, all existing terms, and the user-defined custom administrative terms. For a full list of auxiliary tables, see *Auxiliary Tables* on page 201.

Indexing

Tables with a **Index** column allow you to control the order in which data appears in PlugWright, EventStream Manager, Policy Manager and Global Task Manager. Tables with a **Index** are indexed and others are not. The names of index terms appear separately in the application. In PlugWright, terms that are not indexed are shown separately. On the top of window and the indexed terms are shown below the window. In EventStream Manager, Policy Manager and Global Task Manager, indexed terms are shown at the top of window and the non-indexed terms are shown below.

Note: To set the sort order for indexing terms, see *Customization and Integration Tools* on page 201.

Reserved tables

The following tables are included in DB Tables for informational purposes only. They should not be edited.

- **API Tables**
- **EventStream Flow Types**
- **Application Roles**
- **Integrations**
- **Storage operations (Global ID interface)**
- **Configuration Status Types**

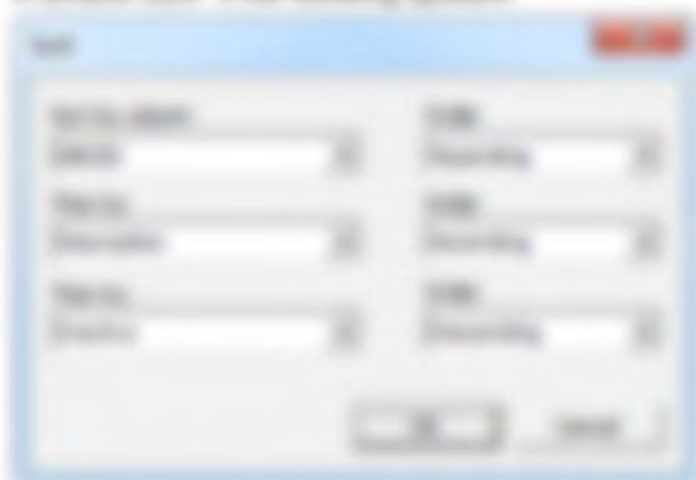
- Distribution Method Types
- Events Behavior
- Order Modification Types
- Order Type Status
- Order Types
- Order Groups
- Order Types

What you can do

Set up the test

1. Set up the test

A window with the following options:



In the **Test** dialog, select the test to set up.

- a. To apply a second test within the already tested results, select the second column to set up in the **Test** dialog box.
- b. To apply a first test within the already tested results, select the first column to set up in the **Test** dialog box.
- c. Tests are listed in ascending alphabetical order by default. To change the test order, click the drop-down arrow in the **Test** box for the test and select **Ascending** or **Descending** as required.
- d. Close the dialog.

How about generating test

10. Budget**Budget Worksheet Tables**

Any change made with entries are saved first. Therefore, entering a spreadsheet formula and software are considered active entries.

For this step you enter the entry in each category, with appropriate entry entry consideration for the example, the entry "Rent" should be entered above "Rent" and "1,000" should be entered above "1,000". If you want to add a second the sufficient changed any of the entry options, the entry will be added manually.

Add an entry to a table

1. In the **Budgeting Tables** table, double-click the name of the table.
2. Click **Blank**.
3. Click a cell and type the new data. This action is used for the new cell data. This must be the active cell and active another cell. Complete all columns in the table.
Some tables include columns with entries from other tables. For example, the table table include columns that only data entry is as far as the spreadsheet table information is entered in these columns by selected from a drop-down list that appears when you click the cell.
4. When you have finished adding entries, click **Done**.

Delete an entry from a table

1. In the **Budgeting Tables** table, double-click the name of the table.
2. Select the entry to delete.
3. Click **Done**.

Note: In some cases, you can delete entries without deleting rows. These cases include a column selected heading. Deleting heading removes the entry from applications. Changing the data row removes that data. Some of entries can also be deleted, but this action is permanent.

Modify an entry in a table

1. In the **Budgeting Tables** table, double-click the name of the table.
2. Click a cell to edit.
3. To replace an existing entry, enter new data. To add the entry, press **Ctrl** and add the data. To delete other cell data, click **Done**.
4. Click **Done**.

Delete a table entry to remove it from applications

1. In the **Budgeting Tables** table, double-click the name of the table.
2. Select an entry to delete.
3. Select the entry row in the spreadsheet column.
For all entries from the column.
4. Click **Done**.

Note: In some states, you can do the entire without opening bank. These states include
 Colorado, Kansas, and Utah. Selecting **Stateless** removes the entry from your form. Choosing the
 state you intend to do business in allows you also to select the state in which you intend to
 operate.

DB Editor and System Configuration

Access Rights and Users

There are two types of access rights:

- Rights associated with application functionality are called "system rights" and are part of the software; you cannot create new system rights or delete existing ones.
- Rights associated with storage content are called "PrescriptionManagement rights." A group of prescription rights are provided; you can create new rights using DB Editor. As their name implies, these rights control access to medications and updates to the database.

System Rights

The following system rights can be granted to user groups:

System right	What you can do with this right
add to Front Office	Provide an update from the Front Office when participating in that participating, including i.e. By default, all audit entries are added to the Front Office.
add Storage	Use the following features in RPT Administration: • Prescriptions with records or medications is added.

System right	What you can do with the right
	• View a dashboard • Configure system tabs Note: To view all administrative users need the "Configure Tools" right also either the "Dashboard Manager" role or "Tools Manager" role or a "Tools Case Manager" role right.
View or Change System During Run Time	Monitor the tool after downloading - see log of activities performed while run.
Dashboard Manager Role	• Run Dashboard Manager • View Dashboard • Make presentation and documentation (additions) able to update. (You do not have presentation or creation rights to the other components.) • View all roles on the system screen. (See also the "Global Monitor" role effect.) • View Dashboard Manager or toolset configurations. (Note that this right may not allow you to change Dashboard Manager or toolset configurations - for that you need the "Global Monitor" role right.) • View Remote Monitor or toolset configurations • Run all administrative. (You also need the "Dashboard Tools" right to this.)
Build Map Tools	Use the Build Map Administrator tool to create tool sets templates.
Build Map Tool	Create and edit tool maps.
Build Map Role	View tool maps.
Dashboard	Run a dashboard and access all functionality.
Global Monitor Role	Monitor all data, or functionality, in Dashboard Monitor, Global Case Manager, and Tools Manager except the following, to which additional rights are needed: • Patient history • Demographic window

DB Editor and System Configuration

Access Rights and Users

System right	What you can do with this right
	• View and edit system settings • Manage configuration • Ability to add and delete certain events and attachments only • Audit module • Ability to document affected IP and Session User Names • Configuration module • Ability to add to and delete • Ability to create and edit certain groups of objects within the System view • Ability to move and delete windows • Group-based functions • Group-based management of multiple connections
Viewing	Use the Configuration module and access all functionality
Configuration Management	Use Customers to perform the following tasks: • Create and edit configuration sets • Create logical configurations and apply computers to that • Assign configuration sets to configurations • Create server groups using Hostnames Manager, IP/MAC Manager, or File/Folder Manager. For less information, see the Administration Tool Guide. • Create and configure server windows using API Administration (To view Customers, you also need the Customers right.)
Virtual Host Manager View	See use for "Hostnames Manager View"
Customers	Use Customers and edit the host configuration configuration. (To access other features, you need the Configuration Management right.)
DB Editor	Host and use DB Editor users must also have the right "Virtual Hostnames Manager" to work with items in the Virtual Hostnames View and the right "Host Hostnames Management" to work with items in the Groups, Users, and Access Rights views.

11 Roles and System Configuration

Access Rights and Roles

System right	What can you do with this right
Access Control Role	Access a staff role
Demographic Access Role	View or modify data in the relevant Demographics window (also also see Policy Home Menu item role right)
Demographic Modify Role	View data in the relevant Demographics window (also also see Policy Home Modification role right)
Demographic Configure	Use the Demographic Editor in Customise
Demographic Management Access Role	View the Demographic Management tool that is provided within the Demographic Information tool
Demographic Modification Role	View other modification tool View the current content and details of data that is provided within the Demographic Information tool
Demographic Information Role	View previous information in the Demographic window that are not Access Rights
Demographic View	View the Demographic window
Demographic Edit	Access the Demographic window for an individual
Demographic Tool	View and use details in the Demographic tool Note: To edit staff information, users need the 'Demographic Tool' right and also see 'Demographic Modification Role' 'Policy Manager Tool' 'Information Manager Tool' right Users can create, update, or delete information, view data in the Demographic window and also print information Users who also have the 'All Demographic' right can access additional functions. Also see role for the right to view details.
Demographic Tool	View the Demographic window, view all data and update the

System right	What you can do with this right
Admin	
Mapping Tool Admin	Use all Mapping Tool functionality, including the ability to remove roles.
Mapping Tool user	Use all Mapping Tool functionality except the ability to remove roles.
Create System Access	Create and edit mountpoints, scheduled, standard order, protocols, and other storage system content. Note: Superusers with this right can activate any node and add and remove nodes to other nodes even if the appliance does not give activation rights to the other concerned. Note: This right has allowed you to function as a storage node and connect to an external protected node that has a multitenant structure.
Create External Data Knowledge	Access knowledge across nodes in the distributed node structure. Users without this right can view a list of agents but cannot access knowledge itself.
Create Internal Data Knowledge	Access knowledge across nodes in the distributed node structure. Users without this right can view a list of agents but cannot access knowledge itself.
File Storage user	Use file for bandwidth of agent host.
Filesystem Summary for Admin	Agent roles in the role-based view of the Filesystem Summary.
Filesystem Summary for Admin	View Filesystem Summary reports.
Filesystem Summary user	View and print the Summary view of the Filesystem Summary.
Filesystem Status user and File	View Filesystem Status. View and print the summary listing exception events.
File user	View and use the File role.
Filesystem Status user and File user	View or edit roles in the storage class storage console.

DB Editor and System Configuration

Access Rights and Users

System right	What can you do with this right
Policy Manager Admin - all	View data in any database Policy Manager window. Note that the Policy Manager configuration user right is also needed to view data for these Modifications in the Configuration module in Database Manager, Policy Manager, and Central User Manager.
Policy and Storage Manager Admin - all	View the interface from both Policy Manager in the Configuration module
Policy Data Modifications - all	View or edit data in the Policy Modifications window in Policy Manager and in the Configuration module in Database Manager, Policy Manager, and Central User Manager. View data from a previous session in an interface into the the Policy Modifications window.
Policy Manager all	Run Policy Manager. Additional rights are needed to view and edit data.
Policy Data Tool all	View or edit data in the Tools and Reports window in Policy Manager. View data from an interface into the the Tools and Reports window.
Policy Manager in a tool	View or edit data in the Physical Data window in Policy Manager. View data from a previous session in interface into the the Physical Data window.
Policy Manager & Database - all	View or edit data in the Post Manager History window in Policy Manager. View data from a previous session in interface into the the Post Manager History window.
Policy Supervisor	Run user Supervisor in tools window.
Policy Manager History - all	View or edit data in the Manager History window in Policy Manager. View data from an interface into the the Manager History window.
Configuration	Access Configuration settings and commands in Policy Manager, Configuration Manager, and Central Manager.
Provision	Run and use the Provision utility. This right is needed when creating, updating, deleting, or saving the Provision utility in other utilities like Configuration Manager, Policy Manager, or Central User Manager. It is not needed to running the Policy Manager, Database Manager, or Central User Manager.

11 Roles and System Configuration

Access Rights and Roles

System right	What can you do with this right
Profile Create the Goodness Manager Profile	Provides an event log profile for the Goodness Manager event. This right allows you to proceed with getting the event in the Goodness Log. Other Goodness events are not added.
Profile exception manual override	Set or unset the "manual override" flag for an exception record that the user has the right to view in the Report Viewer.
Profile report all v1	View and print all exception and concerning reports in the Report Viewer.
Profile report all v2 print	View Report Viewer. View and print exception and concerning report in which the user is a recorded exception provider.
GR Mapping Tool	Run the Mapping Tool that is used to configure Goodness Reports.
GR exception log report	Open the exception quality report.
GoodnessLog	No usage yet.
Report Menu	View, print and save reports.
Report Audit Menu	View an audit trail showing who it is viewed, printed and saved reports.
GR Events	Document the Mapping Tools and Goodness v events.
GRD user and role	Use the Supervisors, Managers, Workers.
Security Report View v1 view	View Report Viewer. View and print "all role" reports.
Role Supply	Activate Role Supplies function in Goodness Manager. In the GR, document Goodness Manager supplies and its use in GR Manager for the Goodness Manager, Supply Log.
SuppliesChange event v1 view	No use.
SuppliesChange event v2 view	No use.
SuppliesChange event v3 view	No use.
Supply Log	Access the Supply Log and Role Supply window.

System right	What you can do with this right
	Users can view or delete objects and table objects. These rights allow users viewing the objects and data. In such cases, users can also update or add some information without having the right to edit other parts of the table.
System Object Mapping	Also currently used. Reserved for future use.
Control Object Name	Control a control name that is open for editing by another user.
User Account Management	Access the Groups, Users and Access Rights menu in DBEditor.
Off Guard	Enable/disable the Off Guard in a test mode.
Database Control	View and make updates in Database Manager, Table Manager, and Schema View Manager.
Database Control Access	Access the "Database Control" tag in a test mode.

Note: This list of the following rights is required to view a Report object:

- Report object view & edit
- Database object view & edit
- Security Report View & Edit

Prescription/Validation Rights

Each treatment and order in the tool has two rights associated with it:

- A "prescription" right for prescribing existing and/or new suggested orders in the patient chart. The prescription right is also needed for editing or deleting an order.
- A "validation" right for determining completion of a task related to this order.
- Dependent on the system configuration, either the prescription right or the validation right is needed in order to cancel or discontinue the order (for more information, see [DB Editor](#), section [Access to Discontinue](#), either on page 107).

Note: No rights are needed for the automatic discontinuation/cancellation of orders that would still in patient is suggested.

You can use Prescription/Validation rights in two ways:

- To limit access to treatments in order to prevent repeat orders from conflict with them.

11 Roles and System Configuration

Access Rights and Roles

- To prescribe specific treatments with certain types of documents it is necessary to have an other treatment for these documents.

Prescription rights allow you to control who can add and document different sets in a patient chart. These rights allow the needs of different types of users and treated patients and procedures. Rights are assigned to treatments and standard orders.

Rights are also assigned to user groups. There is a group user with all of necessary items that share the same prescription rights. Users who use the items in which they have access with ordering. The above you is not allowed to items and their items as the operators who only the user that they add.

A set of default rights is provided. System rights are updated during database installation. Not assigned to the items and standard orders before the database is given set. This rights can be added to an existing database. The can be done using 11 Editor, as described in this guide.

Example of how prescription rights are used

The example is allow only doctors to add any standard records order in a patient chart but allow both nurses and nurses as document in administration. The following rights should be set:

- A prescription right called "Nurses order" and another called "Nurses document"
- Standard orders for all operators only the items should set to "Nurses order" and the standard items set to "Nurses document"
- A user group called "Doctors" with the prescription right "Nurses order" All doctors are members of this user group
- A user group called "Nurses" with the prescription right "Nurses document" All nurses are members of this user group

Standard Order

Operator: N-10 my information: Nurse: N-100

Order: Nurses	Order: Nurses
Standard: procedure	Standard: document

The "Nurses procedure" right is needed to order supplies.

The "Nurses document" right is needed to document that supplies has been given.

Group	His Rights
Doctors	Nurses order Nurses document
Nurses	Nurses document

View Privileges/Permissions rights

- To view the list of existing rights, do the following:
 - In the **Groups, Users and Access Rights** node, open the **Privileges/Permissions Rights** window. All supervisor and permission rights are displayed on the right side of the screen.
- To view the rights associated with treatment, do the following:
 - In the **Outpatient Tables** node, double-click **Treatment**.

Create a new Privileges/Permissions right

- In the **Database** menu, click **Privileges/Permissions Rights**.
- Click **New**.
- Enter a name for the privileges/permissions right.
- Click **OK**.

You can now assign this right to user groups and to new treatments and standard orders.

Program Users

If you are installing the system for the first time, user names were entered upon the database and system file installation. You can use DB Editor to create groups for these users and assign system and Privileges/Permissions rights to the groups. You can also use DB Editor to reassign user names such as adding and deleting users, modifying passwords, and modifying user groups.

Create a new user

- Click .
 - In the **Database** menu, click **User Profiles**.
- Enter the following information:
 - User's first and last names** (You must not leave either of these blank.)
 - User Name** This unique combination of numbers as letters, is key in to the system.
 - Initials** The user's initials appear on prompts to identify the user who entered a standard order.
 - User ID and Group User ID** (optional) Identification numbers, such as the social security number, or any other number the hospital associates with a staff member. You must enter a User ID and User ID.
 - Staff Type** Select an entry from the staff identification list.
 - Access Rights** To indicate that the user is currently assigned to use the system.

11 Roles and System Configuration

Assign Rights and Roles

- To assign professional categories for the user, select an **assigning type** in the **Available Assigning Types** list and click on it to add it to the **Selected Assigning Types** list. To select those that will not add, you can hold down the **ctrl** or **cmd** key while you click. Don't forget you can make separate selections, or be asked you to select non-separated users.
To remove an assigning type from the list, in **Selected Assigning Types**, click the **Assigning type**. Then click **OK**.
- To add the user to groups, select **group** in the **Available User Groups** list and click on it.
- To create a password for the user, click **Set Password**, enter and confirm the new password, then click **OK**.

Note: Passwords should only be set on administrative functions. They may be further protected depending on the global password settings. For more information, see [Password Protection on page 229](#).

To see the user when it has password at the next log on, have these controls ready. Although a user can set a password password to access applications, he or she should be encouraged to change it when next logging on to an iFlex application. The **Warning Message Password** in the login window.

- Click **Change Your Password**. If you do not want the user to be notified in a maximum number of failed login attempts, click [Password Protection on page 229](#).
- Click **OK**.

Build a user profile

- In the **Groups, Users and Access Rights** window, open the **Users** subwindow. All users are displayed on the right side of the window.
- Double-click the user you want to modify.
- Enter the following information:
 - User Name** and last name.
 - User Name**: The unique combination of numbers or letters, as log on to the system.
 - Initials**: The user initials identify the person logging in then in the front log.
 - User ID** and **Initial User ID** optional. Identification numbers, such as the social security number, or any other number the hospital associates with a user number. The last number of both user user ID.
 - Mail Type**: Select an entry from the mail identification list.
 - User Address** to indicate that the user is currently authorized to use the system.
- To assign professional categories for the user, select an **assigning type** in the **Available Assigning Types** list and click on it to add it to the **Selected Assigning Types** list. To select those that will not add, you can hold down the **ctrl** or **cmd** key while you click. Don't forget you can make all user selections, or be asked you to select non-separated users.
To remove an assigning type from the list, in **Selected Assigning Types**, click the **Assigning type**. Then click **OK**.

- To add the user to groups, select a group in the **Available User Groups** list and click the **Add Group** button.
- To **Remove User**, click the **Remove** button. If you do not want the user to be subjected to a maximum number of failed login attempts, click **Remove Restrictions** on page 273.
- Click **OK**.

Reset a user's password

- In the **Groups, Users and Access Rights** window, open the **Users** subwindow. All users are displayed on the right side of the window.
- Double-click the user you want to modify.
- Click **New Password**.
- To assign a new password to the user, enter it in the **New Password** and **Confirm New Password** boxes.

To set the user under a new password at the next log on, leave these subwindows blank.

Note: Passwords should only exist in applications systems. There may be further restrictions depending on the global password settings. For more information, see [Password Restrictions](#) on page 273.

Although user log on is provided password is unique applications, go it also should be encouraged to change it after each logging on to a Free application for better **Change Password** in the login window.

- Click **OK**.

Block a user who has been locked out

A user becomes locked out when he or she has exceeded the configured number of unsuccessful login attempts. [DB Editor Restrictions](#) on page 273.

- In the **Groups, Users and Access Rights** window, open the **Users** subwindow. All users are displayed on the right side of the window.
- Double-click the user you want to block.
- Click **Block User**.
- Click **OK**.

Block indefinitely a user

- In the **Groups, Users and Access Rights** window, open the **Users** subwindow. All users are displayed on the right side of the window.
- Double-click the user you want to block.
- Click the **Block** option box. (Users cannot be permanently removed from the system.)
- Click **OK**.

User Groups

Users acquire their access rights from the groups they belong to. In an individual user, a user can belong to more than one group.



Figure 2. The user manager uses the user settings to see the user and group. User settings is user group A or user is user group B, and therefore has the rights of both groups.

Clinical Rules

Users of Healthcare Manager and PHO Manager typically need to document and perform certain key functions in a team. The identifying team members of a member is their medical specialties. A staff member with a specialty identifying. Look up of a different user in a specific procedure. For example, a member might be in a different user. Primary Author, Secondary Author, Reviewer, Editor, or other possible roles are listed in Clinical Rules.

In your hospital that can use IBM Manager, you can perform the following tasks using IBM Manager:

Create a new virtual role entry

Modify the attending types associated with a virtual role entry

Delete a virtual role entry

If your system is configured for participative integration with IBM Manager, these tasks are performed using IBM Security Manager.

Create a new virtual role

1. Click 
 - a. In the Create/Edit menu, click **Virtual Roles**.
 - b. In the Description box, enter the name of the role.
 - c. In the Available Attending Types box, select the types that you want to perform the role in a procedure. Then click OK.
2. Click OK.

Modify the attending types associated with a virtual role

1. Click 
 - a. In the Create/Edit menu, click **Virtual Roles**.
 - b. In the Description box, enter the name of the role.
 - c. In the Available Attending Types box, select the types that you want to associate with the role. Then click OK.
 - d. In the Available Attending Types box, select the types that you want to disassociate from the role. Then click OK.
2. Click OK.

Delete a virtual role

1. Click 
 - a. In the Create/Edit menu, click **Virtual Roles**.
2. Check the Virtual roles box.
3. Click OK.

Attending Types

You can create attending types or edit the names of existing ones. Certain attending types are required by the system and cannot be deleted.

11 Settings and System Configuration

Logon Reports

You can view and edit existing reports in the Windows Task Scheduler table. The system log is integrated with Off-Site Manager. The table is not available in Off-Site Manager, you should instead use Security Manager.

Note: For a system's `eventlogviewer` to appear in the Configuration module in **Emergency Manager** the existing report of the `eventlogviewer` must be downloaded in the Windows Task Scheduler as the user has the `ADMINISTRATOR` (`Administrators`) by default. The user is called "eventlogviewer".

Logon Reports

For users using administrative privileges with Off-Site Manager, logon reports are generated using Off-Site Security Manager.

Off-Site Manager allows system administrators to generate a logon report for all users or for a chosen user. The following list describes the specified when creating a report:

- 1 The user or all users.
- 2 The period covered by the report.
- 3 The applications for which logon details should be shown.
- 4 The actions to appear on the report: successful logons, unsuccessful logons and authenticating other users.

Reports also show the computer location where each action occurred.

Create a logon report

- 1 In the **Programs, Users and Network Rights** window, open the **Logon Reports** subwindow. All users are displayed in the right side of the window.
- 2 Double-click the user for which you want to create a report. (To create a report for all users, double-click **All Users** users.)
The Logon Report window appears. The user is selected by default in the drop-down list in the bottom of the window. You can modify the user selection here, if necessary.
- 3 Enter the period to be covered by the report in the **From** and **To** boxes.
- 4 Select the actions to appear on the report: **Successful logon**, **Unsuccessful logon**, **Log On Succeeded**.
- 5 Under **Apply to**, check the **From** applications for which you want to add logon details. (To see details for all applications, choose **Select All**.)
- 6 Click **Display** to generate the report on screen.
- 7 To print the report, click **Print**.

2. User Roles

Hospital Departments and Patient Locations

EMR Editor allows you to work with patient locations and hospital departments. Locations are created in the database that correspond to rooms used by patients and their caregivers. Each caregiver and patient location is associated with a department. Hospital departments exist on the EMR Editor but need not exist in the hospital.

Because the hospital has multiple workstations, you select in the EMR Editor the table in the database that corresponds to the workstation where

Note: This location is not used in the "Set Location" window to select. For more information on configuring EMR Editor, see *Configuring EMR Editor*, page 117.

There are three types of locations:

- A **location workstation** is both a workstation and a patient location. The workstation can be used to select only in the location.
- A **multiple workstation** is a workstation but not a patient location. Multiple workstations allow caregivers to work with multiple patients who is admitted to multiple locations.
- A **patient location** is a patient location without a workstation. There is no patient location when admitting a patient to a multiple unit.

For more information, you can use EMR Editor to enter patient data when in multiple workstations, and in testing and select data.

For more information on workstation types, see the *Workstation User Guide*.

Create a Department

1. Click  on the **Department** menu, **New Department**.
2. Click **New**.
3. Enter the department name and click **OK**.

Note: After creating a department, you can add it to a facility. Tap a name in the **Department** window with the left button mouse and a new window for the department directly in the Department table. For more information, see *Creating a Facility*, page 117.

NOTE: If you forget to use either the first step or the second step in the algorithm, you will not receive credit for the problem.

Note: Department types are only used in stores. For a department to be accessible in stores it must be in a department type of 000, 001 or 0000. Type department type is not stored in any of the applications.

1. **Set the Working Table into a Single-Row Department.**
2. **Copy Table Department, under the top sheet up first up stop sheet 1st**
3. **Close Sheet**

1. In the **Department** menu, click **Locations**.
2. In **Department**, enter the name of the test location, such as "PHYSICIAN OFFICE".
Description should not be repeated within a department.
The description helps database administrators and ORFitter users identify the location. It does not appear in end user applications.
3. In **Address**, enter a short version of the test name, such as "OFFICE".
The address identifies the test in the test format and the ORF window.
4. In **Location Type**, click **Without patient fee**.
Note that this type of location does not have a computer in the
5. Click **Next**.
6. Select a department.
7. Click **Next**.
8. Review the information and click **Finish**.

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For each location, you can use the following information:

- Description**
- Computer Name** of the machine it represents a modified patient test
- Initials**
- Identifier** is system-generated identifier number for the location
- Machine Type**
 - PCB – PCB server
 - DB – Internal network test

Note

Machine Type is set by the factory test when it is set up as a machine. The test is always set up as a machine as opposed to a server.
 Machines with Machine Type "DB" are available for selection when setting up endgroups in Customer. The new identifier can be [located and setting identifiers in section 2.1](#).
 The first bridge connection, the external name is left of the device connected to the data bridge. After the name of the data bridge name itself. The machine type for each connection is "DB".

To use the following information, you must double-click the location and click **Test** to view through the screen.

- Location Type** (Machine, Modified as Modified patient test)
- Department**

Modify a location

- In the **Departments and Locations** table, click the location to modify.
- Double-click the location to change.
- Get the information as needed to:
- Click **Test**.
- Select a new department if necessary.
- Click **Test**.
- Confirm the description and any **Flags**.

Note: The system will create a location type test a patient test is it.

Note: The system will create a device a location.

Note: The system will create a computer name that is already associated with another test.

Microservices System Settings

Template Encounter Type

Templates are identified by their encounter type. Templates for collection, interpretation, and prescription use only right-hand 1 encounter type. For Temperature, Templates for different encounter type use 01000, 0000, 0000, 0000, and 0000 right-hand are called Clinical Care, then Hospital, consult and name the encounter type 1 name.

Encounter type group is the `encounter_type_group` table. They consist of two forms of the name: `EncounterTypeGroup` and `EncounterTypeGroup` and is primarily called `ETG`. If the `ETG` property is set to 1, the encounter type is `encounter_type`. If the property is set to 0, the encounter type is not required and the `ETG` property affects the following aspects of the application:

- The `EncounterTypeGroup` table that contains the most common user diagnosis, procedure, medication and allergy for each encounter. Group Manager, Encounter Manager, Encounter Manager and Clinical Care Manager include tag to interpretation, interpretation, and clinical care tag. This tag and tag will be called. For more information, see `EncounterTypeGroup` table, `EncounterTypeGroup` and `EncounterTypeGroup` in page 200.
- Encounter type collected using an encounter tag to be used to include the affected in using. This record requires data for the first 30 hours of a patient's stay, or an encounter tag tag. The record can only be collected using data collected with a template of either an `ETG` tag tag or property 111, data collected tag is not for template using a record of 1 in the record tag tag.

The encounter type name is displayed for application interfaces as follows:

- The `EncounterTypeGroup` appears in Customer, not in the Product Manager window.
- The `ETG` appears in the application on the same tag, records, and also Product Manager window.

Most templates used only the `ETG` of encounter type provided. You can build that name, not if needed, build new type. The system build entire type the type.

Create or modify an encounter type

- In the **Building Tables** window, double-click **EncounterTypeGroup**.
- To create a new encounter type, click **NEW** and then **OK**.
To change an existing type, click the cell containing the tag or property that you want to modify.
- Enter **Description**, enter or change the name of the encounter type, and then press **Enter**.
- Enter **ETG**, enter or modify the tag for the encounter type, and then press **Enter**.
- Enter **ETG**, enter 1 if the encounter type is for use in encounter type. If it is not, enter 0.

- When you have finished creating and modifying resource types, click **Done**.

Create the resource type for a template

- In the **Resource Tables** window, double-click **Resource Types**.
- Locate the template name in the list.
- In the **Group** column, select the new resource type for the template.

Facilities

Facilities are used by this program to determine the behavior of various attributes and supply setting.

The resource facility is "facility group". The facility group is setting the activation settings in order for those facility group. The type facilities are groups in which security depends on the activation type facility is defined as described in the Workstation user guide. A facility can only belong to one facility group.

You can also use an alternative to in the addition to your facility group in an activation system for queries to show system security and a specific facility is facility. For more information, see *System Attributes* on page 1111.

Note: Various attributes will only apply security access for all facilities for which the user has access rights.

Creating and modifying facility groups and facilities

Goal Practice: Create facility groups before you use to facilities. Before creating a facility you will then specify the facility group that it belongs to.

Create or remove a facility group

- In the **Resource Tables** window, double-click **Facility Groups**.
- To create a new facility, click **Add** and then **OK**.
- Under **Description**, enter or change the name of the facility group. See the page earlier.
- When you have finished creating or removing facility groups, click **Done**.

Create or edit a facility

When creating a facility, you must assign it to a facility group.

Caution: After setting the data entry for a facility, you should not change it.

Facilities cannot be deleted but their descriptions can be changed. Before a facility can be modified, all of its related departments must first be unassigned or left they can be assigned to another facility.

Create or modify a facility

1. In the **Building Tables** folder, create new **Facilities**.
2. To create a new facility, click **NEW** on the **FILE** menu.
To change an existing facility, click the cell containing the text or property that you want to modify.
3. Enter **Description**, which is a change the name of the facility, and then press **ENTER**.
4. Enter **Short Name**, which is modify the short name for the facility, and then press **ENTER**.
5. Enter **Facility Group**, which is facility group for the facility, and then press **ENTER**.
6. Enter **Phone Area**, which is the area for the facility from the drop-down menu.
7. When you have finished creating and modifying facilities, click **Done**.

After creating facilities, you should map departments to them.

Map a department to a facility

1. In the **Building Tables** folder, create new **Departments**.
2. Under **Facility**, select the facility from the drop-down list.
3. When you have finished mapping departments to facilities, click **Done**.

Facilities and Supply Billing

Note: Supply billing is only available for sites that belong to an **Off Storage**. For more information, see the **Maintenance User Guide**.

Facilities are linked to storage as follows:

- When mapping events with events, the Customer user must first select a facility before processing the event maintenance associated with it. For more information on event event mapping, see **Event Mapping in the Supply Log**. After the selected facility and maintenance is configured in **Off Storage**, the user information, see the **Off Storage Configuration Guide**.
- You can configure a selected "use area" for each facility.

Each event can be assigned a "use area" in the Supply Log. The user can assign to each site a specific customer billing code for events. For example, **Transportation Off** and **Storage Off** could be assigned one common billing number from the same company.

When a user is added to the Supply Log manually or automatically, an event maintenance event is also be assigned the default use area associated with the facility, as shown in a. When it is defined the area is defined for the facility, the user then must set the use area to use that in the Supply Log. For manually added users, you can change the use area to the first Supply service area setting up that. For auto manually added and automatically added users, you can change the use area that for an event in the Supply Log any time after it is been added.

Set the default user name for a facility

1. Under **Facilities > Facility**, the **Area** dropdown lists the names of the facility in the right pane.
2. Under **Select the Area**, select a user. You then are taken to the chosen facility in the left pane and then back to the list of the list. Facilities window. In you have the search bar.
3. **Facility**, select the facility type the drop-down list.
4. When you have finished mapping departments to facilities, click **Done**.

Event Mapping

It is possible to associate event type with Events in order to support Supply Log functionality. If and when a request event is added to the Events Log in Workforce Manager, an associated event get added to the Supply Log automatically.

Map events to event types

1. In the **Workforce** menu, click **Event Mapping**.
2. In the **Event Type** box, select an event type.
3. Under **Events**, click an event and then click **Done**.
4. In the **Facility** box, select a facility.
5. In the **Inventory** box, select an inventory.
The event for that inventory appears in the left pane below.
6. Select one or more event items from the left pane and click **+** to move them to the Selected Events pane.
7. Click **OK**.

Audit Trail

Work Manager, Workforce Manager, HRIS Manager and Virtual Case Manager records audit trails of major user actions across the system. You can configure these programs to create a trail whenever audit trail is fully comply with HIPAA requirements for protecting patient data.

The settings affect all the aforementioned applications and apply to all departments in the hospital. By default, a complete audit trail is enabled.

Configure the type of audit trail

1. In the **Facilities > Area** box, double-click **Configuration Parameters**.
2. In the **Area** column, click the cell next to the **Enable creation of System Events Audit Trail** option.
3. Since HRIS is complete audit trail.
Since HRIS is limited audit trail that does not record the following actions:
 - Cancelled test ordering

DB Editor and System Configuration

Administrative System Settings

- Successful or unsuccessful user log on.
- User log off.
- Start and end of an interruption in device data collection.
- Warning message about device if no interruption.
- Successful or unsuccessful automatic or manual restart message about device if no interruption.
- Logging is enabled.
- Warning is printed about.
- Logging is off; system restart log shows if the **flow warning message while processing DB records** setting. For more information, see *System Management* on page 223.

a. Press Enter.

Password Parameters

The parameter "internal module" user password option is set using DB Editor, as described in this section.

The user using *entree* for integration with DB Manager, password option are set using DB Security Manager. Password settings in DB Editor are either unavailable or ignored.

You can configure the following password settings:

- The number of consecutive failed login attempts before a user is locked out. Passwords are locked independently of the application. For example, two attempts to log in to Flow Manager followed by an attempt to log in to DataStream Manager will not lock you out of the system. When users are locked out of the application, you are locked out from all Flow applications. DB Editor can be used to "unlock" the users that have been locked out. (See *Locks in DB Editor*, the Users Locked out on page 223.)
- The user may specify user names that deny locked out. (See *Locks in DB Editor*, the Users Locked out on page 223.)
- The period after which user passwords expire. Users may change their passwords before the period expires or continue using the option.)
- The advanced option that user specifies before their passwords are due to expire.
- Whether passwords must contain both numbers and letters.
- The minimum and maximum width of a password.
- The ability to reuse previous passwords.

See also *Security, Device Authentication* on page 225.

Set the number of login attempts before users are locked out

1. In the **Security** tab, click **Security Configuration**.
2. In the **Policy** column, click the cell next to **Maximum number of failed login attempts before user is locked out**.
3. Enter a number. Setting a user to be locked out after the number of unsuccessful consecutive login attempts. A value of 0 means that users are never locked out. A value less than 0 means that users are never locked out.
4. Press **Enter**.

Set the password expiration period

1. In the **Security** tab, click **Security Configuration**.
2. In the **Policy** column, click the cell next to **Password expiration period in days**.
3. Enter the number of days passwords expire after this period. A value of 0 means that passwords never expire.
4. Press **Enter**.

Set the minimum value for password expiration

1. In the **Security** tab, click **Security Configuration**.
2. In the **Policy** column, click the cell next to **Minimum password age in days before password expires**.
3. Enter the number of days before a user before that password expires. A value of 0 means that no value is given.
4. Press **Enter**.

Set whether passwords must contain both numbers and letters

1. In the **Security** tab, click **Security Configuration**.
2. In the **Policy** column, click the cell next to **Password must be alphanumeric**.
3. Enter 1 if passwords must contain both numbers and letters, otherwise enter 0.
4. Press **Enter**.

Note: You can also set this option in the **Password Configuration** under **File & Password Configuration**.

Set the minimum and maximum lengths that passwords can have

1. In the **Security** tab, click **Security Configuration**.
2. In the **Policy** column, click the cell next to **Password minimum length** and enter a value.
3. In the **Policy** column, click the cell next to **Password maximum length** and enter a value.
4. Press **Enter**.

11 Settings and System Configuration

Authentication System Settings

Note: You can also set this option in the Password Configuration window (File > Password Configuration).

Enforce ability to reuse previous passwords

1. In the **Available Tables** table, double-click **Configuration Parameters**.
2. In the table column, click the cell next to **Password reuse count**, determine and enter a value.
3. Press and release all settings after the table is updated changes.

Example: The setting is 3. It will give the password and then also change it to use this value changes it to reuse. The new password will be the right.

4. Press **Save**.

Note: You can also set this option in the Password Configuration window (File > Password Configuration).

Directory Services Authentication

User authentication information can be maintained in a Directory Service server (DNS) operating, such as Microsoft Active Directory. In general, when LDAP authentication is enabled, password cannot be set for users and the **Change Password** button does not appear in login window of this application. For all details, see the **Appendix A LDAP or RDP or RDP Security Windows user guide**.

LDAP Filtering

When user enters login credentials for LDAP Properties, an LDAP server is searched for matches. LDAP filtering can be used to refine the results of the search.

You can configure the LDAP filter using LDAP syntax operations. For more information on these operations, see the **Microsoft Exchange Network (LDAP) Filter** link in the article **Searchable System Attributes**.

LDAP filter creates powerful queries and the search filter results are as follows:

- 1.

Search the LDAP for object **myName** as **DN**.

The **LDAP** filter parameter has a variable to automatically select the user name that is entered in the login window in the LDAP authentication window.

Example

The LDAP filter setting is **cn={username}**.

The user enters **Username** in the username field of the login window.

Use Oracle Service Authentication (OSA) to protect sessions**1. In the `Database Tables` window, modify the `Configuration Parameters`:**

- 2. In the `Table` column for `authenticationMode`, enter `1` to use Oracle Service Authentication to controlling access to this table (note: an value of `0` means that the feature is not used).**
- 3. In the `Table` column for `authenticationPath`, enter the OSA path in the directory that stores the Java security certificates.**
- 4. In the `Table` column for `authenticationType`, enter one of the three authentication types below:
 None: These test passwords are passed over an unencrypted communication channel.
 Secure: This is the default and uses SSL as a baseline depending on the underlying security provider supported by the operating system.
 SSL: Authentication is performed over a secure communication channel using a server certificate. The SSL server must be enabled in `osb`, and the server certificate must be installed as `Trusted` in all client machines via Java policy.**
- 5. In the `Table` column for `authenticationTemplate`, enter the template to be used for authentication. If a value is entered, users will not be able to create a domain when logging in. If this field is left blank, users will be able to create a domain when logging in and that domain will be authenticated as not a.**
- 6. In the `Table` column for `authenticationProvisioning`, enter the parameters of any users who are allowed to register OSA security, separated by comma. Security for guest users will be managed in `OSBUsers`.**
- 7. In the `Table` column for `logoffTime`, enter a time and the appropriate unit. (This setting cannot be left blank.)**
- 8. Press Enter.**

Reports

When an user uses reports the Reports window they are shown a list of report the OSA files that are in a workspace folder. The information on creating and modifying report files can be found [here](#).
[Workspace OSA files in java doc](#). The table shows Report files are installed as the default globally in a virtual host for Proxy Manager. An authentication used for Anonymous Manager. Proxy Manager and only Proxy Manager. An activation script is used. It read that setting controls the global setting.

Example

The global report will setting is `GlobalReportSetting`.

This template has report will setting of `GlobalReportSetting` when the template is used. An report available in the user depend on the report file installed locally in the table. Another template has no report will setting when this template is used and report available in the user depend on the report file installed in the Remote location.

DB Tables and System Configuration

Database System Settings

Type-related locations that reports use a report is not able to adjust globally at the report level. As with the report file location, a report-level setting overrides the global setting.

Regardless of whether a path is global or is a template, it can be either local or remote. The variable, a global setting must be `"/"` if `ReportPath`/`PrintReportPath`. Each user's "local" access to the report uses path with "local" access to the report file path.

Best Practice: Keep the report file path different to the report user path.

Because the paths reports use has more global configuration options available for reports:

- You can configure whether users are able to change the location where reports are a report to.
- You can configure whether a notification should be sent to the DB when a report is saved. (If you enable this setting, the path for a report reports must be a shared network address.)

Best Practice: If you enable the DB notification, enable the ability for users to change the location where reports are saved to.

Configure table locations for reports at a global level

1. Open DB Tables.
2. In the **Database Tables** table, double-click **Configuration Parameters**.
3. In the **Table** column, click the cell next to **ReportPath** **ReportPath** and enter or modify the path where report files (PDF) files are located.
4. In the **Table** column, click the cell next to **ReportPath** **ReportPath** and enter or modify the path where reports (PDFs) will be saved.
5. Press Enter.

Configure the ability for users to change the table that reports are saved to

1. Open DB Tables.
2. In the **Database Tables** table, double-click **Configuration Parameters**.
3. In the **Table** column, click the cell next to **ReportPath** **ReportPath** and enter "1" to allow changing the table at the location is.
4. Press Enter.

Configure the system to notify the DB when a report is saved

1. Open DB Tables.
2. In the **Database Tables** table, double-click **Configuration Parameters**.
3. In the **Table** column, click the cell next to **ReportPath** **Notify DB** and enter "1" to enable DB notification at the location is.
4. Press Enter.

Exchange Resources

You can configure the list of Exchange resources that appear in the drop-down list of the window **get** to show other exchanging e-address.

Note: There is also a configuration parameter that controls whether users of a workstation get all other Exchange users in the system other than Exchange e-address. If new Exchange users entered by user is automatically available to all workstations. For more information, see [1], page 105.

Work - Exchange users

1. In the **Mailbox Tables** window, double-click **Exchanges**.
2. Click **add**.
3. In the **Mailbox** column, type the Exchange account.
4. Press **enter**.

Mail - Exchange users

1. In the **Mailbox Tables** window, double-click **Exchanges**.
2. Check the box that you want to change.
3. Click **delete** to permanently remove the entry, or click **toggle** to deactivate it, or click **fix** in the **Mailbox** column with all the text.
4. Press **enter**.

Standard Coding

The **Standard Coding** window allows you to map certain items in the database to standard codes that hospitals can use for data analysis in third-party software. You can use the coding in the following window either in **Mailbox**:

- Standard Coding for Assessment Item
- Standard Coding for Events
- Standard Coding for Event Types
- Standard Coding for Physiological Data
- Standard Coding for Social Data
- Standard Coding for Treatments

For detailed information regarding Standard Coding and the **Standard Coding** window, see the **Standard Coding** Guide.

DB Editor and System Configuration

Workflows System Settings

Workflows are mapped only, either system or custom, mapped, or neither by users in DB Editor. However, users will have the ability to create and modify mappings as desired. (Mappings can never be deleted.)

The columns for each mapping appear as follows:

Source	How mapped	External Standard Code	Internal Standard Code
Source(s) of the mapped items	Source of items from the database. For phrasings that DB Editor can detect. For mappings that map items to classes defined by the WHO codes or abbreviations.	An alphanumeric code of up to 30 characters.	An alphanumeric code of up to 30 characters.

Privacy Messages

You can configure the following "pop up" messages:

- A message to be shown in the log file window at application startup.
- A message to be shown when users open ICF patient records.
- A message to be shown when users open the records of patients who have withdrawn consent to be included in research that uses.

The operations "Global Patient" allow privacy messages are set using DB Editor, as described in the article.

For sites that interface with DB Manager, privacy messages are set using DB Security Manager. (The settings are described in DB Editor.)

DB Editor provides default message text that can be used for all English translations. Note that the text is not automatically available if the translation language is not US English.

[Configure a message to be shown in the log file window at application startup](#)

1. Click **GlobalPatient > Security Options**.
2. Select **Show privacy message upon application start**.
3. Enter/modify the proposed text in the log pane.
4. Click **OK**.

[Configure a message to be shown when ICF patient records are accessed](#)

1. Click **GlobalPatient > Security Options**.
2. Select **Show warning message when accessing ICF records**.

11 Settings and System Configuration

Windows System Settings

1. Dragged the required icon to the middle of the
2. Click OK

Note: Enabling this setting also enables an audit trail of user access to all system accounts. For more information, see the [System Account Guide](#).

Configure a message to be shown after "Windows Connect" events are received

1. Click **Windows > Security Options**
2. Click **Show warning message after receiving a first security alert** (event content was sufficient)
3. Dragged the required icon to the bottom pane
4. Click OK

Note: Enabling this setting also enables an audit trail of user access to "Windows Connect" system accounts. For more information, see the [System Account Guide](#).

DB Editor and Clinical Content

Clinical Auxiliary Tables

The following table shows the main auxiliary tables for clinical content.

Table	Description
allergy	List of possible allergies that a patient might have
allergy_type	allergy classifications. Examples: Food, Environment
analysis	Laboratory analyses for the 'Detailed Laboratory Results' window
assessment_term	Terms for each assessment
assessment_substance	Laboratory substances for the 'Detailed Laboratory Results' window

Topic	Description
Form Type	Identifications for forms in which notifications can be administered. Only used for standard tables.
Form	Drop-down list entries for forms in which notifications can be administered. Available for selection upon creating table.
Summary Data Source	Table descriptions for summary data results in the Laboratory Summary window. Only used when there is a link to a targeted summary system. Data is typically supplied by the summary system.
Summary Source	Source for summary data results in the Laboratory Summary window. For example, report. Only used when there is a link to a targeted summary system. Data typically supplied by the summary system.
Form/Summary	Summary identifier for Patient Summary table type.
Form Type	Patient Summary table type.
Form Components	Type that links the Component and Page table. It can result in a group of components used in one or more analyses. In practice, page and the analysis use the same.
Page	Table that links the Analysis and Components table. Page names are typically identical to Analysis names. The page name is not used anywhere else.
Formula Variable	Formulas create variables, tables, comments, and notes. Formulas to define variables. Existing entries can be modified, but new entries cannot be added. Labels cannot be entered in formula to be defined variables in the Formulas variable analysis database table in SB Editor. Instead, the table must be used. Note that you can use the Formula Manager tool to update/define a formula and then to add it will automatically, as long as you confirm the display is from the table table representing the variable in the Formulas variable analysis table.
Form Type	Identify form for administration mode of notifications and fields used for filtering appropriate data for different forms of notification.
Form	Drop-down list entries for administration mode of notifications and fields used when creating table.

Note that the Treatment auxiliary table allows you to add treatments that already exist. You can use the table to change a treatment's name within the rights associated with it. You cannot add the table as a table or treatment or to change the category, a treatment's settings or effect on Medication, etc.).

Caution: There is nothing to prevent you from inadvertently creating two or more treatments with the same identifier.

Auxiliary Tables

See auxiliary table on page 107

How you track changed setting entries, *See: Change*, on page 108

Events as entries from a table on page 108

Events as entries in a table on page 108

Auxiliary Table Usage by Functional Area

Standard Orders

Event Types

Events

Event Types

Events

Standard Orders

For Events

Event Types

Events

Note: Standard entry, entries table, standard orders are an integrated configuration and interpretation/translation system.

Events

Event Types

Events

Patient Summary

Event Types

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• While the network sends all the output values, it doesn't keep track of the network's step. The use of an output indicator, suitable to describing the network's step through a network's indicator steps.

- Trade marks of items that affect a patient's life include drugs, alcohol products, vehicle equipment, or products for sexual and reproductive health. Trade also include items for documenting health care, such as notes, tests from doctors, and blood.
- Treatments are special interventions that are available only for specific situations with items in the 12 Trade category. Treatments cannot be documented about or with other types of Trade. Examples of special situations include emergencies, injuries, illnesses, and other situations.

Note: To use a treatment you use the Treatment section of the Clinical Content table. However, to add a trade treatment you use the Treatment section with with currency. Examples: Items on page 200.

Trade - medication

1. In the Clinical Content table, double-click **Treatments**.
2. In **Trade Category**, click Medication and then click **New** to go to the next step in the wizard.
3. In **Family**, enter a new family name or select a existing family for the medication.
4. In **Treatment**, enter the name of the medication.
(This step may be enter any special at the start of the name.)
5. Set the access rights required to enter and document the item.
 - In **Prescription Rights**, enter the Prescription/Indication right required to add, modify, document, enter, and select the item.
 - In **Indication Rights**, enter the Prescription/Indication right required to view, document, and document with that administration or a subject at 0.

Right assigned to treatments and other content under name or these requirements. Standard codes are assigned that set rights.
6. Click **Save**.

Trade - blood product, drug or other fluid

1. In the Clinical Content table, double-click **Treatments**.
2. In **Trade Category**, click **Flows** and then click **New** to go to the next step in the wizard.
3. In **Substance**, select by, select one of the following:
 - Whole Products** for whole blood, plasma and blood derivatives.
 - Drugs** for medications that are infused continuously.
 - Fluids** for culture, electrolyte solutions for sexual and reproductive health, bone solutions and intravenous solutions, and fluids for oral intake.

If you select this step, use **Family** for name (use the entire list of fluid codes/Flows). If you select a substance, the **Family** box shows only the relevant families.
4. In **Family**, enter a new family name or select an existing Family for the fluid.
5. In **Treatment**, enter the name of the fluid.
6. Set the access rights required to enter and document the item.

12 Boiler and Clinical Content

Contractor Treatment

- In **Prescription Review**, enter the Prescription/Indication right required to add, modify, discontinue, cancel, or extend the rxn.
- In **Indication Review**, enter the Prescription/Indication right required to have, discontinue, or document add and administration in a patient's chart.

Rights assigned to treatments only affect content orders used in these treatments. Standard orders are designed right and rights.

1. Create New

Create a newly flag entry for documenting output

1. In the Clinical Content menu, double-click **Treatments**.
2. In **Order Creation**, click **Flag** **OFF** and then click **Flag** to go to the next step in the wizard.
3. In **Reference**, optionally, enter one of the following:

Bound RDR for records of bound rxns

Flagged RDR for other types of newly flags.

None for cancel and withdrawal.

If you enter any flag, the **Flagged** box below shows the entire list of bound output families. If you enter a reference, the **Flagged** box appears only for order in families.

4. In **Flagged**, enter a new family name or select an existing family for the flag.
5. In **Treatment**, enter the name of the flag.
6. Set the order rights required to order and document the rxn.

- In **Prescription Review**, enter the Prescription/Indication right required to add, discontinue, cancel, and extend the rxn.
- In **Indication Review**, enter the Prescription/Indication right required to document add and administration in a patient's chart.

Rights assigned to treatments only affect content orders based on these treatments. Standard orders are designed their own rights.

2. Copy New

Create a flag addition

1. In the Clinical Content menu, double-click **Additions**.
2. Click **New**.
3. In **Definition**, enter the name of a new addition or select an existing one.
4. In **Units**, enter the minimum and or maximum doses and the corresponding unit of measure.
5. In **Refill Concentration**, optionally, enter the default concentration as a percentage or unit per volume. Enter an additional other concentrations during a session.

This setting is used only when a user selects the **Refillable Addition** to volume option when documenting a flag containing the addition.

Note that the concentration refers to the addition, measured in a volume that is added to the base flag and not the concentration of the addition in the base flag itself.

6. In **Test Results**, enter the presentation/abbreviation flag that is used to display tests in order to add the addition to a flag.
7. Click **OK**.

Laboratory and Diagnostic Tests

Three types of test/flag entries are available for laboratory work:

- **Physiology variables:** Tests supported by devices, such as blood gas, telemetry, or ultrasound, enter the test as represented in physiology variables. If no device supplies data, tests can enter data manually.
This type of configuration can also be used to build in data entry if there is no test in the physiology system. Tests appear in **Physiology** and can be included in the **Pattern Summary** and printed but does not appear in the laboratory Summary.
For example: **Creatinine (Blood)**, **Arterial pH**, **Arterial pO₂**, **pH**, **Base Excess (pH)**, **Base Deficit (pH)**.
- **Laboratory analyses and components:** Analyzed via the names of all test/flags that include one or more components. The **Laboratory Analyses and Components** window adds through a test. If no test exists, tests can enter results manually. Tests appear in **Physiology** and can also be added in the **Laboratory Summary** window and included in the **Pattern Summary** and printed.
For example: **Chemistry 1 (CBC)**, **Urea Function Test**.
- **Diagnostic and laboratory variables:** Tests that components are supported by a system, after being completed, the test/flag affects the test and changes the definition of the test. Tests are not added in the **Laboratory Summary** although other laboratory results may be.
For example: **Gender (at a test)**, **CBC culture**, **Prognosis (CBC)**, **Antigen**, **Pathology function test**.

Configuration Instructions

Physiology variables: To maintain a physiology variable with test, first a "laboratory record" **OH-Editor and Physiology Variables** on page 120.

Laboratory analyses and components: See **Laboratory Analyses and Components** on page 120.

Diagnostic and laboratory variables: See the following procedure.

Create a test for diagnostic tests or laboratory activity

1. In the **Clinical Content Editor**, double-click **Treatments**.
2. In **Order Categories**, click **Laboratory** and open **Test** to go to the next step in the wizard.
3. In **Family**, enter a new family or use an existing or existing family for the test.
4. In **Treatment**, enter the name of the test.
(This test will be added only appear in the test of the system.)

■ Order and Clinical Context

Context for Prescriptions

- Set the access rights required to create and document age tests:
 - In **Prescription Access**, select the Prescription Access right required to add documents, select and select the test.
 - In **LabOrder Access**, select the Prescription/LabOrder right required to designate and document data about administration on a patient's chart.

Rights assigned to treatments only affect custom orders based on given treatments. If custom orders are assigned their own rights.

Order Note

Note: Notes entered in this way after tests is attached and document the completion of tests orders in treatment and diagnosis sets. The orders are not designed to document the results of tests.

Laboratory Analysis and Components

If there is a link to the hospital's laboratory information system, the system usually supports the analysis only, analysis and component names automatically as it works with. This typically does allow direct testing of the test using sample data. There appear to designated order or treatment settings are "linked".

Manually add or update to the database

- Click **Analysis Table** on the left side of the main window in the table.
- Double-click **Analysis** in the list of analysis tables on the right side of the main window.
- Click the **Add** button to add a new row to the table.
- In the new row, enter the name of the new analysis.
- In the **Table** column, enter a number corresponding to the position of the test set has to others in the table and then click **OK**.

Note: **Analysis** is a new table, single test numbers (00, 01, 02, ...).

This step is optional. If you have the table table, sometimes appear in the table they were entered.

- Click **Table**.
- Double-click **Table** in the list of analysis tables on the right side of the main window.
- Click the **Add** button to add a new row to the table.
- In the new row, enter the table name as you entered in the **Analysis Table** (Example: 00).
- In the new row, in the **Analysis** column, enter the name you entered in the **Analysis Table** (Example: 00).

Manually add laboratory components to the analysis

1. Click **Building Tables** on the left side of the main window in SB Editor.
2. Double-click **Components & Handling** in the list of analysis tables on the right side of the main window.
3. Click the **Add** button and enter the name of a component on the main row. Repeat this for each component in the analysis.
 For example: Hematocrit cells.
4. When you have finished entering component names, click **Done**.

Manually add components to an analysis

1. Click **Building Tables** on the left side of the main window in SB Editor.
2. Double-click **Test Components** in the list of analysis tables on the right side of the main window.
3. Click the **Add** button and enter the code of the analysis in the Test column.
 For example: 100.
4. On the same row, click in the **Component** column and enter the name of a component in the cell.
 For example: Hematocrit cells.
5. Continue adding new rows and selecting components until the analysis is complete.
6. Click **Done**.

About the sort order for analyses and components

Regardless of whether analyses and components are added automatically or manually they need to be in a specific order in all their sort orders in Feedback. (Adding means assigning an index number.)

When analysis names are shown in the sort **Show sorting by default** option selected, they appear in the order determined by their indices. Test components appear ordered in the order determined by their indices.

When analysis names are not shown in the sort **Show sorting by default** option selected, components appear in the order determined by their indices.

In both cases, items that do not have indices are displayed in alphabetical order at the end of the list.

For example:

Not sorting by	Is sorting by
	

1. Load a new provider in spreadsheet application, enter the order numbers in two tables, look at the following:

Component	Value
101	1
102	1
103	1
104	1
105	1
106	1
107	1
108	1
109	1
110	1
111	1
112	1
113	1
114	1
115	1
116	1
117	1
118	1
119	1
120	1

Order	Value
101	1
102	1
103	1
104	1
105	1
106	1
107	1
108	1
109	1
110	1
111	1
112	1
113	1
114	1
115	1
116	1
117	1
118	1
119	1
120	1

Example tables for components and orders

2. Save test data from the laboratory information system to the components that need loading before sending data to other components. This is test 1 used to find the components you need in database tables.
3. In **SB Orders**, go the order numbers in the **Components** and then into another table using the spreadsheet you created as a guide.
4. All the laboratory data is left to select family, create an order and components you should create the another table in **SB Orders** too and then to see if any changes to order numbers are needed.

Nursing Care, Respiratory and Ventilator Treatments

In **SB Orders** and **SB Orders** you can get, orders, you need to include nursing and respiratory therapy activities in the test data. Components are loaded after required data are test and they are document get the data into spreadsheet. You can create new activities and add existing orders in the **SB Orders** table in the **SB Orders** table.

Note: Treatment is not the correct use of spreadsheet. It is not the right data, properly in **SB Orders**.

Load a nursing care treatment

1. Load **SB Orders** on the left side of the main window in **SB Orders**.
2. Double-click **SB Orders** on the left side of the main window.
3. In **Order Category**, select **Nursing Care** on the left side **SB Orders** on the left side of the main window.
4. In **Family**, enter a new family name or select an existing family for the test.
5. In **Treatment**, enter the name of the activity.
(You can not to enter any orders at the step of the test.)
6. Set the correct rights required to order and document the test.

■ Order and Clinical Content

Order by Treatment

- In **Prescription Review**, select the Prescription/Review right required to add, describe, cancel, and extend the item.
- In **Initiation Review**, select the Prescription/Review right required to describe and document the drug administration in a patient's chart.

Rights assigned to treatments only affect custom orders used in those treatments. Standard orders are designed right out right.

1. Case New

Order a respiratory therapy treatment

1. Click **Global Content** on the left side of the main window in i2b2.
2. Double-click **Treatments** on the left on the right side of the main window.
3. In **Order Category**, select **Respiratory** and then click **Next** to go to the next step in the screen.
4. In **Reference**, optionally, select **Respiratory Therapy**.
If you select this step, the Family tree below shows the families of all respiratory items. If you select a reference, the Family tree shows only the relevant families.
5. In **Family**, select a new family name or select an existing family for the item.
6. In **Treatment**, enter the name of the therapy.
(This name will be under the symbol in the start of the order.)
7. Set the access rights required to create and document the item.
 - In **Prescription Review**, select the Prescription/Review right required to add, describe, cancel, and extend the item.
 - In **Initiation Review**, select the Prescription/Review right required to describe and document the drug administration in a patient's chart.

Rights assigned to treatments only affect custom orders used in those treatments. Standard orders are designed right out right.

2. Case New

Order a cardiac stress test treatment

1. Click **Global Content** on the left side of the main window in i2b2.
2. Double-click **Treatments** on the left on the right side of the main window.
3. In **Order Category**, select **Respiratory** and then click **Next** to go to the next step in the screen.
4. In **Reference**, optionally, select **Respiratory**.
If you select this step, the Family tree below shows the families of all respiratory items. If you select a reference, the Family tree shows only the relevant families.
5. In **Family**, select a new family name or select an existing family for the item.
6. In **Treatment**, enter the name of the item.
(This name will be under the symbol at the start of the order.)

- Get the correct rights required to enter and document the text.
 - In **Prescription Review**, enter the Prescription/Initiation right required to add, document, correct, and delete the text.
 - In **Initiation Review**, enter the Prescription/Initiation right required to document and delete information on patients' chart.

After assigned to implement any other custom orders based on these instructions, Standard orders are assigned from user rights.
- View Note

Checklists for Assessments, QH Indicators, and Equipment

The checklist form is shared by three types of items:

- Review assessments are evaluating aspects of a patient's condition to select care and guide healthcare environment. Assessments are assigned to appear in Feedback.

Note: An initial Feedback entry for the type of item. If user document assessments, you must create a custom Feedback and highlight it to include assessments.

- QH indicators collect data needed to guide resource assessments for ongoing patients. These items are designed for a operational review of the entire team.

Note: Items can be added as single orders or as part of a global protocol configured for the group. Depending on the configuration configuration, QH indicator may or may not appear in Feedback. For more information, see [Assessments, QH Indicators and QH Indicators](#) on page 202.

- Equipment sets collect data about equipment and supplies used during the operation. These sets are designed for operational review of the entire team.

Note: Equipment can be added as single orders or as part of a global protocol configured for the group. Depending on the configuration configuration, equipment sets may or may not appear in Feedback. For more information, see [Assessments, QH Indicators and QH Indicators](#) on page 202.

The checklist form you create are added to the Feedback table. During the process of creating a checklist you generate into a new form with the thought. After creating the checklist, you can add or edit existing items in the Assessment form table.

Note: Assessment and equipment items appear as added from the Feedback.

Create an assessment checklist

- Click **Clinical Content** in the left side of the main window in OBnotes.
- Click **Assessments** in the right side of the main window.

12 Editor and Clinical Content

Content for Prescriptions

1. In **Order Category**, select **Prescriptions** and then click **Next** to go to the next step in the wizard.
2. In **Prescribing**, click **New DR Assessment**.
If you select this step, the **Family** tree below will also open the families of the indication. If you select a reference, the **Family** tree shows only the selected families.
3. In **Family**, enter a new family or use an existing family for the assessment.
4. In **The body**, enter the text of the assessment.
(Text can be entered into spaces at the start of the body.)
5. Add the action right reported to order, and document the text:
 - In **Prescription Group**, select the Prescription that has right reported to add documents, select, and enter the text.
 - In **Reference Group**, select the Prescription that has right reported to document with dose administration or a reference step.
 Rights assigned to treatment only affect what orders based on those treatments. Standard orders are changed but not added.
6. Click **Next** to go to the next wizard step.
7. For each described item, do the following:
 - In **Description**, enter the text in the
 - In **Code**, enter the abbreviation or code for the item.
 - Click **add**.

Example

Treatment Group Item
 Description Item Group Name Age
 Code: 100 100 100

When adding assessment items in this step, the **Description** is unique to 10 characters and the **Code** is 10 characters. If you select add a self assessment item directly in the Assessment Item table, the **Description** and a 10 characters are the **Code** and a 10 characters.

Standard items appear in the order to select an ordered item. You can change the order by editing the order property in the Prescription Item table. See [Add a standard assessment, add, reference, assessment at page 100](#).

Order a DR Indication Indicator

1. Click **Clinical Content** on the left side of the main window in **Editor**.
2. Double-click **Assessments** on the right side of the main window.
3. In **Order Category**, select **Assessments** and then click **Next** to go to the next step in the wizard.
4. In **Register**, click **DR Assessment**.

If you edit the step, the **Family** box below will also show the families of existing assignments. If you select a different, the **Family** box shows only the selected families.)

1. In **Family**, enter a new family name or select an existing family for the step.
2. In **Treatment**, enter the name of the step.

(Users can not to enter any codes at the step of the name.)

3. Set the access rights required to enter and document the step.
 - In **Description Review**, enter the Prescription/Intervention right required to:
 - describe, select, and select the step.
 - In **Intention Review**, enter the Prescription/Intervention right required to document step last administration or a patient's D.O.B.

Right assigned to treatments and other custom codes based on these assignments. Standard codes are assigned their own rights.

4. Click **Next** to go to the next screen step.
5. For each standard step, do the following:
 - In **Description**, enter the step name.
 - In **Code**, enter the abbreviation or code for the step.
 - Click **OK**.

Example

Treatment: **Protein**

Intention: **None**, **None**, **None**, **Drug**, **Chemical**, **Chemical**, **Chemical**, **Chemical**, **Chemical**, **Chemical**

When adding assignment items to a step, the **Description** is limited to 4 characters and the **Code** is 10 characters. If you exceed 4 or 10 characters, the assignment items already in the treatment items table, the **Description** and 10 characters and the **Code** and 10 characters.)

Users can't in the order to which you entered the. You can change the order by editing the order property in the treatment items table. We can't a standard assignment, all information, dependent on the step code.

Code is not assignment standard

1. Click **Clinical Content** on the left side of the main window in OB Studio.
2. Double-click **Standardized** on the right side of the main window.
3. In **Order**, enter **Prescription** and then click **Next** to go to the next step in the screen.
4. In **Family**, enter a new family name or select an existing family for the step.
5. In **Treatment**, enter the name of the step.

(Users can not to enter any codes at the step of the name.)
6. Set the access rights required to enter and document the step.
 - In **Description Review**, enter the Prescription/Intervention right required to add, describe, select, and select the step.

12 Tables and Clinical Content

Contents of the Table

- In **Tabletop View**, select the **Prescription/Indication** right column to document any drug administration as a collective drug.

Rights assigned to treatments only. Treatments only may be used in these statements. Standard tables are designed for use only.

1. Click **Next** to go to the next screen step.
2. For each standard table, do the following:
 - In **Description**, enter the text name.
 - In **Units**, enter the abbreviation or units for the text.
 - Click **Next**.

Example

Standard and Treatment

Standard Name: Hypertrophy, 100% the volume, 100% of volume, 100% volume

When enter treatment data in the table, the **Description** is limited to 20 characters and the **Units** is 10 characters. If you need to get a full treatment name directly in the treatment table, the **Description** has a full character and the **Units** has a 10 character.

Table names in the table in which you entered them. You can change the table by adding the table property in the treatment table. The table is created automatically. All columns, treatment table.

Table standard treatment, 10 columns, treatment

1. Click **Getting Table** on the left side of the table window in **Table**.
2. Click and **Standard Name** on the list of standard tables on the right side of the table window.
3. To add a new table to the list, click the **Add** button and enter the name of an item on the top row. This process is not.
- To add the name of an item, change the text in the **Description** column.
- To change the name of items on the list, describe them in the **Units** column.
- If you want to delete an item, contact your database administrator.
4. When you have finished entering standard items, click **Close**.

Score

The general standardized score is provided for use in clinical use environments. Standard is not change score table. These scores are calculated in the software and are available in the Score table.

You can use the table and score scores using the Score table. If you require your standard that standard content, you cannot edit directly, use scores the table. **Getting Table** is to use the table.

12.10 Buttons and Clinical Content

Buttons for Navigation

- You can create a button by mapping an existing event and setting its. The button "type" is added to the event.
- The user provides the event to add that it will lead to and users.

Event Name

A name consists of one or more groups. Within each group there may be one button enabling the user user to select a single item or group items, enabling the user user to select one or more items. When you create a button you define the group, format, and behavior. Also there will be one group and the points associated with each item.

You specify each item in a group as either visible or calculated.

Custom items are those that conditions that are not visible to the user data in the subject sheet. For example, "Button response: right". If an user user selects right, it then indicating that the condition is met for points associated with the item are added to the total score.

Calculated items, on the other hand, add points to the total score automatically when user that is already in the subject's or it satisfies conditional conditions. When configuring each item you can choose from the following table types:

- Demographic type and gender.
- Response variables.
- Laboratory components.

For calculated items, you can specify a single condition. For example, "age > 50" is multiple conditions. With multiple conditions, you can specify that the points are added to the total score when all conditions are met. For example, "age > 50 AND height > 180" is either. If all the conditions is met. For example, "age > 50 OR height > 180".

Button Reference

Button	Response
None	Creates a score with no points.
Fixed	Creates a score based on a type of another score.
Sum	Sum is all 5 points. Note: The availability of this button depends on the position of the selected event. It is greater for the scores that have been published regardless of whether they are active or inactive.

Action	Response
Publish / Activate	Publish is a draft action or activate an inactive test event. Note: The state and availability of the button depend on the status of the selected event. For draft events, the label is "Publish". For published events that have been deactivated, the label is "Activate". In published events that are currently active, the button is grayed out.
Republish / Status	Republish is a draft action or republish an active event. Note: The state and availability of the button depend on the status of the selected event. For draft events, the label is "Republish". In published events that are currently active, the label is "Republish". In published events that have been republished, the button is grayed out.
Preview	Preview is a button to see how test event will appear off app 2.

Publish, deact, republish, activate or preview a event

1. Click **SB Editor Feedback** on top left side of the SB Editor window in SB Editor.
2. Double-click **Status** in the list on top right side of the test window.
The Status window appears.
3. Select a event in the left pane.
4. To publish a draft event, click **Publish**. (The event will become active test.)
5. To deact a draft event, click **Deact**.
6. To republish an active event, click **Republish**.
7. To republish an inactive event, click **Republish**.
8. To preview a event in the same way and how will app 2, click **Preview**.
9. To close the window, click **Close**.

Note: Any changes you have made are preserved. The button is labeled "Cancel" because the same button is used to cancel with editing a event.

Create a draft event from window

1. Click **SB Editor Feedback** on the left side of the main window in SB Editor.
2. Double-click **Status** in top left on the right side of the main window.
The Status window appears.
3. Click **New**.
A new window appears.

12.3.3 Header and Clinical Content

Complete Prescriptions

- a. In **Family**, enter a new family name or select an existing Family for the test.
- b. In **Treatment**, enter age name of the tests.

(Note: you can not to enter any species at the top of the name.)

Note: If you attempt to create a name using a treatment name that already exists within the selected family, it will not be able to appear about the Treatment box and you will be unable to save any changes.

- c. Set the access right required to enter, not document the test.
 - In **Prescription Group**, select the Prescription/Prescription right required to add documents, records, and enter the test.
 - In **Treatment Group**, select the Prescription/Prescription right required to document with above administration or a different drug.

Note: Rights assigned to treatment only affect what orders based on those treatments. Document orders are assigned their own rights.

Note: You will not be able to save the group unless you have selected access right for it.

- d. Click **Next** to go to the next screen step.
The Screen Editor window appears.
The top of the Screen Editor shows a simple header of age first group.



- e. Click the add button in the group header.
 

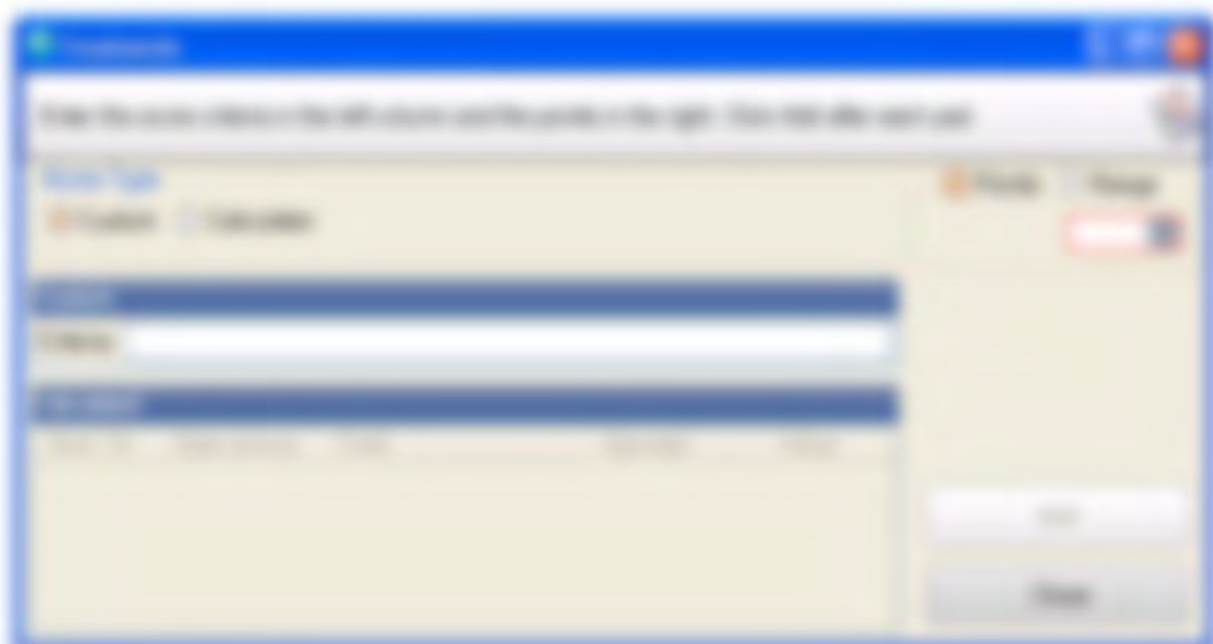
The simple use for the first test appears below the header as follows:



- f. In the simple use, enter a name for age group.
- g. To create a group of single buttons, click **Single Selection**. To create a group of check boxes, click **Multiple Selection**.
- h. To create an item in the group, click the add button in the simple use box. The new item is:



The following window appears:



To create a condition item...

1. Click **Conditions**.

- In **Conditions**, enter the condition name.
- If you want to associate a fixed number of points with the condition, click **Points** and enter a number in the box below. Note that negative values are permitted.
- If you want users to enter the points that a range that is associated with the condition, click **Range**. It records two separate values. Enter the start of the range in the left box and the end of the range in the right box. Note that negative values are permitted.
- Click **Next**.

To create a calculated item...

1. Click **Calculations**.

An already has appeared in the "Calculations" section.



You can enter as many conditions in this section as you want. The first is the setting for each condition determining whether the points are added when all conditions are met or when any condition is met. The setting you choose (AND or OR) must be the same for all conditions.

Note: In all cases only one condition is true, but makes whether you select AND or OR.

12 Editor and Object Context

Context for Placement

- Text Header** - enter text as title as required
- Text Title source** - enter other descriptions, Properties or categories
- Text Head** - enter a text from the title source that you specified
- Text Operator** - enter a mathematical operator (may be greater than, less than, or not both)
- Text Value** - enter the comparison value
- If you want to describe a first number of points with the text, **Text Header** and enter a number in the left box. **Text Operator** and enter a number
- If you want to enter the points from a range that is associated with the text, **Text Range** is second box operator text. Enter the start of the range in the left box and the end of the range in the right box. Note that negative values are permitted.
- Text End**

- When you have finished entering items for a group, click  is the group header. A new group header appears for the next group and an icon appears to the left of the group indicating it type.



Group Header



Single Header

- Use next group as needed in the same way as described for the first group.
- When you are done, click **Done**.

Best Practice: Prepare the work before publishing it

Text is used based on an existing work

- Click **Object Context** on the left side of the work window in **Editor**.
- Double-click **Source** in the list on the right side of the work window. The Source window appears.
- Select a work and click **Copy**.
- Follow the procedure for adding a text work. Repeat step 2 as needed.

Text is a new work

- Click **Object Context** on the left side of the work window in **Editor**.
- Double-click **Source** in the list on the right side of the work window. The Source window appears.
- Select a range and click **End**.

12. Scales and Clinical Content

Constructive Feedback

Schedules for automatic testing and PBA scales are included in the scales and scales table. The scales include automatic and PBA when they exist in a schedule for the measure.

2. Scales/PBA: When creating schedules you must use tests thoroughly to ensure that scales are created at the time expected. Testing should include entering at least 10 to 20 test items is expected.

Note: You can create schedules. All you cannot edit again.

Schedule Reference

Scale Type	Frequency	Duration	Frequency
Primary Schedule	Times of the day is the expected when your schedule is constructed and it is not the same duration for scales. Times must be entered separately. For example, 3 A, 4, 5 is different for 6, 7, 8, 9 hours.	Total duration and frequency scales is expected to be	As it is not the same for the day Days = 1, 2, 3 Duration = 1 As it is not the same for the day Days = 1, 2, 3 Duration = 1
Primary Schedule	Frequency is expected	Total duration is expected	Days = 1 to 3 Days = 1 to 3 Duration = 1
Secondary PBA Secondary Schedule	As it is not the same for	Total duration of scales is not the same	As it is not the same Days = 1 Duration = 1
Secondary PBA Secondary Schedule	As it is not the same for, with a different duration for scales duration is expected	Total duration of scales is not the same	As it is not the same Days = 1 to 3 Days = 1 to 3 Duration = 1

Order Type	Frequency	Duration	Examples
One-time	No other or recurring appointments is optional	Time duration of order given. Start is shown on the chart for the period of time that order will last and will repeat.	Continuously for 48 h. Thurs. 11-12 Sat 10am-11am

Order Scheduling

A "One" schedule is a schedule whereby schedule 0-1 can be used to enter a single visit type on the Schedule. Such schedules are used for items involving a single action that will be performed and documented on one day such as: "Respiratory tests, x-rays and assessments that will be performed once." If you choose this, you should include such schedule you can repeat and using a frequency of 0-1 and a duration of 1.

For appointments that your user is the able to perform repeatedly over a week, use a continuous schedule frequency 1-1 and a duration of 48 h or 7 x 48.

How About Multiple Schedules

There are several points to keep in mind when creating multiple schedules:

- The 1-1 visit type is schedule for specific days of the week such as "Every Thursday". (For this you must need to create a weekly schedule and user must need to provide it to start on Thursday.)
- The system calculates the time of the first day in a schedule by adding hours to minutes of the start date when the order is submitted.
- The system calculates the time of subsequent visits in the schedule by adding hours to the date and time of the first visit in the schedule.
- When an "Every" order is submitted, the system calculates the schedule weekly as it was created. Therefore, the time of the first scheduled visit of the subsequent week is equal to the date the order is submitted after adding hours to the date and time of the last visit.

Example: If you want to create a schedule for a recurring order that begins on 4:00 every week and repeats weekly for 1 month, you have the following options:

- 1. Create a weekly schedule that has an interval of 7 days. You can repeat that order the order is not correct due to changing the start date. The order will extend using the 7 day interval.
- 2. Create an "Every" schedule with a frequency as described above.
- 3. Frequency: 0-1, 48, 48, Duration: 1.
- 4. Frequency for the first day: 0-1 hours 0 days after 4 hours. The date and time of the first visit is 4:00 4 days after the start date.
- 5. Frequency for the subsequent visit: 0-1 hours 0 days added to the first visit. The date and time of

■ Schedules and Clinical Content

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The system year is 0:00, 7 days after the first year.

Frequency for the system year: 400 hours per day within the system year. The day number of the first year is 0:00, 7 days after the first year. When the year of attachment is extended, it will leave the first year after the first extension year is no longer 7 days after 7 hours after midnight on the day the year is extended, ending the year on the 7th day of 7th. The system will continue to extend only on the same day as the year as the system year.

Note: When using the year of attachment, users must be advised to change up their date when go into a first extension as that is again on the system year. In our example, ending the year by leaving the 7th day as "today" will make the first year 7 days after 7 hours from today. If that is a Tuesday, the year will end now end on Monday at 0:00. Instead, when extending each system, users should change the date on the day after the year is actually extended.

Steps to Periodic or PRR schedule

1. In the Clinical Content menu, double-click Schedules.

2. Click New.

3. In the Description box, enter the schedule name.

4. In the Frequency box, enter the specific administrative time schedule schedule in the interval between two system schedules.

The **Interval** schedule, enter one or two administrative times using whole numbers between 0 through 24, 11:11:11. Separate multiple times with commas. For example, an entry of 0:00, 12:00 would enter system 12:00 on, 12:00 on and 12:00 on on the day.

The **system** schedule, enter the interval between administrative times in minutes. If the schedule is set with a Periodic entry, set with system on the day of the interval. If the schedule is set with a PRR entry, no system on or day on the day. If a schedule is scheduled on a system PRR entry, enter 0. For system PRR entry, system on day, system on day, system on day, but must be a system schedule for the interval that you specify.

5. In the Duration box, for all schedules, enter Periodic duration, enter the length of time in hours that the first schedule occurs on the day.

The Periodic duration schedule, enter a negative number to indicate the number of days that go into the first schedule on the day. For example, an entry of -1 combined with the system example of 0:00, 12:00 would schedule for 12:00 on, 12:00 on and 12:00 on every day for 1 day.

6. Click New.

7. When you have finished creating schedules, click Done.

Steps to Continuous schedule

1. In the Clinical Content menu, double-click Schedules.

2. Click New.

1. In the **Description** box, enter the schedule name.
2. In the **Frequency** box, enter 1.
3. In the **Duration** box, enter a length of time to treat.
This parameter determines how long an order will stay scheduled, whether active or a treatment as indicated by starting and ending points. Documentation must also reflect the last point. Once started, this order will stop when it is stopped.
4. Click **Save**.
5. After you have finished creating schedules, click **Done**.

Create a schedule

1. In the **Clinical Content** menu, double-click **Schedules**.
2. Select the schedule and click **Done**.

Standard Orders

A standard order contains a treatment with a schedule and other administrative information that can be added to an order that defines the content. **Documentation**, **Start**, and **Stop** must be made. If the order is a part, Standard orders can be changed or previously defined documents the ordering process.

In the case of medications and tests, the standard has information includes the dose and may also include a form for example orders and a note for example order. The user may define an order amount or a note.

Additionally, the order may state if a medication is stopped is a specified volume of a particular dose. If such is order and a period schedule, the duration of each administration may be included for orders. Notes for example for example orders. These orders are either independent medication information.

Best Practice: If you are using standard orders, create a standard order for each test that will be used with the order. Using such is include the minimum required information, only add a test later such is with a highlight, and an order greater than 1 ml, and, for medication information is added.

Create a note, a standard order

1. In the **Clinical Content** menu, double-click **Standard Orders**.
2. Click **New** to create a new standard order.
The order an order can also **Note**.
3. Follow the screen instructions to enter the necessary information.
Order Category: Category for the treatment.
Priority: Treatment priority for the treatment.
Treatment: Action to be performed.

Prescription Information: The information in the Prescription and Medication categories, up includes information for the drug, medication form and medication route. The Medication and Prescription Information includes details of the drug to which the medication is added or any. For the Prescription category, it includes the medication settings or parameters, timing, action.

Note: The Prescription and Medication **Prescription** setting determines whether or not the **Prescription** tab is enabled by default when an end user documents the order.

Available Type Prescriptions (APP) in Prescriptions: For the section **Prescriptions in Prescriptions**, only APP is a medication of any form type. For the **Prescription** setting, only APP is the APP, only the **Prescription** setting can be selected. For medication information, only the **Prescription** or **APP** medication type can be selected.

Medication Schedule: A list of medication schedule in the **Medication** section.

Task Type Medication Schedule: For an end user, select a schedule for medication orders. The **Medication** section provides a **Medication** medication order as well as a **Task** type.

Medication Schedule: This specific schedule that must be met before the medication schedule for the order.

Medication Schedule: Give other information a user needs when processing the order.

Prescription Schedule: Prescription medication (PP) is a user must have an order, modify, medication, action, or select the medication order. This step, medication, medication schedule, or medication medication can be modified.

Medication Schedule: Prescription medication (PP) is a user must have an order, modify, or medication for medication order. This field is medication, medication schedule, medication medication, and medication order can be modified.

Auto-Select Order: Select the order for medication order to be selected automatically when a user selects the medication in the **Single Order** section.

Note: It is possible to set **Auto-Select Order** to be selected. The user should be selected in the end user interface.

1. User History

Single Medication - medication order

1. In the **Clinical Content** section, select the **Medication** section.
2. Select the order.
3. **Order Details**

The order will become medication and appear with a gray medication. It can be medication by selecting it and clicking **Order Details**. If an order is gray, for the **Order Details** section is not available it means the underlying medication has been medication.

Setting: How Type	Measurement: How Type
None	None for other components Pump Rate
Event Volume	Pump Rate
Event	None for other components Pump Rate
Pump Rate	None for all components

Other than having the ability to set none for any measurement, standard orders for continued medications are configured for none standard order.)

Create a newly created or PPM standard order for continued medications

1. In the Clinical Content editor, select the **Standard Orders for continued medications**.
2. Click **None** to create a new standard order.
 - a. Select an order and click **None**.
3. Click a **Measurement Type (Parameter or PPM)** and select a substance from the drop-down list.
4. For **Parameter** orders, choose **None** or **Baseline** for an interlibrary medication situation. If you choose the last, enter the offset time in hours, not minutes. (PPM orders are always **None**.)
5. Click **None**.
6. For any medication component that you want to add, proceed as follows:
 - a. Click **New Item**.
 - b. Click the **Name field** and select the measurement name from the drop-down list.
 - c. Click the left **Dose field** and enter a dose.
 - d. Click the right **Dose field** and select a unit from the drop-down list.
7. If the components are infused with a **Device field**, proceed as follows:
 - a. Select **Infusion**. If you previously selected a substance why **Device**, **Infusion** is selected already.)
 - b. Enter a value for **Dose volume**.
 - c. Select a **Device Family** from the drop-down list.
 - d. Select a **Device Model** from the drop-down list.
8. In **Route**, enter the medication route.
9. In **Route**, enter the medication route.
10. Click **None**.
11. **StopTime** or **Condition**, enter any specific condition that should be met before the regimen terminates the order (such as "to pain").

12. Create New

Clicking on **New** enters any other information a user needs when administering the order.

13. Create New

is a **Prescription Review** when the Prescription/evaluation right is user but need to enter mostly information related to enter the standard order.

is a **Initiation Review** when the Prescription/evaluation right is user but need to be restricted to get more orders or initiate document administration of the standard order.

14. Create Presc.

Create or modify a Continuous standard order for continued medications

1. In the Clinical Content form, double click **Standard Orders for continued medications.**

2. Click **New to create a new standard order.**

(b) select an order and click **add**.

3. Under **Schedule Type, click **Continuous** and select a schedule from the drop down list.**

4. Click **New.**

There are a number of ways to create a new order, but this accommodates the following profiles:

5. Make sure that **Presc role is not selected.**

6. For every medication component that you want to add, proceed as follows:

• Click **New Presc**

• Click the **Name** field and select the medication name from the drop down list.

• Click the left **Dose** field and enter a dose.

• Click the right **Dose** field and select a unit from the drop down list.

• Click the right **Schedule** field and select a unit from the drop down list. (Do not select the **Review schedule** unit.)

7. Select a **Weight Priority from the drop down list.**

8. Select a **Weight Group from the drop down list.**

9. Enter a value for **Presc Interval**

10. In the right **Presc rule field, select a unit from the drop down list. (Do not select a empty rule.)**

11. For each medication component only, click the left **Schedule field and enter a schedule amount.**

When you do this, the other amounts and the other components are calculated automatically.

12. Verify that all values are appropriate. If you need to add any values, consider that the fields are restricted as previously described in this section.

13. In **Flags, enter the medication form.**

14. In **Route, enter the medication route.**

15. Click **New.**

16. Clicking on **Condition, enter any specific condition that would be met before the caregiver administers the order (such as "for pain").**

12 Editor and Global Content

Content for Protocols

12.1 New Note

Clicking on **New** adds any other information a user needs when administering the order.

12.2 Order Note

is **Prescription Review**, when the Prescription/medication right a user must have to enter, modify, delete/review, select, or select the standard order.

is **Medication Review**, when the Prescription/medication right a user must have to reactivate a task, move an order, or update document administration, all the standard order.

Insert **Auto-Order Order** if you want the standard order to be selected automatically when a user selects the to view in the Single Order window.

Note: It is possible to set more than one standard order as the default. The one shown by default is the one most configured.

12.3 New Order

Order Incomplete - standard order for continued medications

1. In the Global Content menu, double-click **Order of Orders for Continued Medications**.
2. Select the order.
3. **New Order**

Note: The order of continued medications it can be reactivated by selecting it and clicking **Order Selection**. If an order is reactivated, but the **Order Selection** button is not at home it means an existing medication has been reactivated.

Note: When a standard order is deleted it is removed from any protocols that it is in. If reactivated, it will be added again to the protocols it was in before.

Protocols

Protocols are groups of dependent orders that can be added to a patient chart together. Users can split the protocols for different situations by adding and removing dependent orders without changing the protocol in the database.

After creating protocols, you can separate them into updates in two ways: you can define a set of updates to go forward that provides feedback automatically with new orders at the start of a session, and you can specify a protocol filter for the updates that which user can choose protocols in really being a session.

The order configuration is defined protocol in order 125.

Create a protocol

1. In the Global Content menu, double-click **Protocols**.

SB Item

The test item shows the standard order and the

1. You can then click on the left side by **Category**, **Priority** or by text that you enter in the **Search** box only matches containing the text will be shown.
2. You can sort the list in the left box by name. **Sort by name** or by the order value assigned to the underlying treatment in the Treatment's matching columns with **Sort by order**.
3. In the left box, select a standard order and click on to add it to the protocol.

Note: To select multiple items, hold down **Ctrl**, while you click them.

4. When you click a Standard select standard orders in the protocol, click **Next** to
5. Order is added to the protocol.
6. Click **SB**.
7. Click **Close**.
8. When you have finished creating protocols, click **Close**.

Search a protocol

1. In the **Clinical Content** box, double click **Protocols**.
2. Search a protocol and click **SB**.
3. You can then the list in the left box by **Category**, **Priority** or by text that you enter in the **Search** box only matches containing the text will be shown.
4. You can sort the list in the left box by name. **Sort by name** or by the order value assigned to the underlying treatment in the Treatment's matching columns with **Sort by order**.
5. To add an order to the protocol, select it in the left box and click on. To remove an order from the protocol, select it in the left box and click on.
6. When you have finished adding the list, click **SB**.
7. When you have finished creating protocols, click **Close**.

Search a protocol

1. In the **Clinical Content** box, double click **Protocols**.
2. Search a protocol and click **Search**.
3. When you have finished adding all protocols, click **Close**.

Remove a protocol

1. In the **Clinical Content** box, double click **Protocols**.
2. Search a protocol and click **Remove**.
3. Click the pop-up menu and click **SB**.
4. When you have finished adding all protocols, click **Close**.

For more information on building your small business, see *Building Your Small Business*, at www.irs.gov.

Arithmetic Operators		
+	Plus (+)	$\text{value} + \text{value}$
-	Minus (-)	$\text{value} - \text{value}$
*	Times (*)	$\text{value} * \text{value}$
/	Divide (/)	$\text{value} / \text{value}$
++	Greater than or equal to (>=)	$\text{value} >= \text{value}$
--	Less than or equal to (<=)	$\text{value} <= \text{value}$
==	Not equal to (<>)	$\text{value} <> \text{value}$

Logic Values	
IF	If condition, value, if True, value, if False Returns the value of the second or third argument, based on the value of condition as follows: - if condition is any value except for zero, value, if True is returned - if condition is equal to zero, value, if False is returned
ISBLANK	ISBLANK (expression) Returns 1 if expression is an ISBLANK value and 0 otherwise See Chapter 10 for details on ISBLANK and ISBLANK as the formula step
ISERR	ISERR (expression) Returns 1 if expression has an ISERR value and 0 otherwise See Chapter 10 for details on ISERR and ISERR as the formula step

Interpret the error returned by formulas

Formulas: All expressions within formulas can return error values instead of data. If you enter formulas directly in cells, the Worksheet cell is all black.

A formula or expression can return the following error value:

- #REF!** Refers to which is a spreadsheet variable or database function that has no value or used as a function argument.
Type occurs when a spreadsheet variable used in the expression is not present in the Worksheet or when no data is available for it.
It also occurs when no value is available for a database function used in the expression.

- **ABS()** Returns the absolute value of a number, such as 10, or the value of an expression, such as 10 + 20.
- **MAX()** Returns the maximum value of a number, such as 10, or the value of an expression, such as 10 + 20.
- **MIN()** Returns the minimum value of a number, such as 10, or the value of an expression, such as 10 + 20.

If an expression returns several values, the value having the highest priority is returned. The values have the following priority, from highest to lowest:

ABS()

MAX()

MIN()

Operator Precedence

The **ABS()** and **MAX()** functions are used to return the absolute value of a number. The **ABS()** function can be combined with other functions to return the absolute value of a number.

The example, the following formula calculates the value of the **ABS()** function. The value is 10.

ABS(10) = 10

Tip: The **ABS()** function returns the absolute value of a number. The **ABS()** function is used to return the absolute value of a number.

Operator Precedence

Expressions are evaluated in the following order:

Expressions are evaluated in the following order:

- Parentheses
- Exponentiation
- Multiplication and Division
- Addition and Subtraction
- Concatenation
- Comparison
- Logical

Expressions are evaluated in the following order:

- Negation
- Exponentiation
- Multiplication and Division
- Addition and Subtraction
- Concatenation
- Comparison
- Logical

Icon	Description
	Annotations that appear with other database annotations or annotation objects.
	A set of language in which object may create or communicate. (This is the default value; set as a language to make it the default language in drop-down lists within the application.) Note: You can also set the default preferred language in the Configuration Properties window with the specifying its code.
	Types for creating items in the Rules area. See also annotations.
	Administration rules for tablespaces and fields. Drop-down list settings available after creating object. Creating element rules created in database.

Common Choices for Diagrams, Procedures, and Alloys

Common choices are distributed set of diagrams, procedures, and alloys that include the set frequently referenced items in a specific set of data. Common choices are also associated with objects in the Configuration and Data Storage window. Items may be displayed in drop-down list controls in the upper half of the object window. Items may also be displayed in the drop-down list as needed for the set found in a specific choice set.

You can modify the contents of a list, but you cannot create new ones. The set displayed is a common choice in the drop-down list with the object. Templates are identified by their associated type or other ID or name. Common choices include:

- Common choices for the set found in a specific choice set.
- Common choices for the set found in a specific choice set.

Note: Common choices that are integral units. They are not included in the main database.

Object Type Details

- **DB Diagrams: Diagrams**
- **DB Procedures: Diagrams**

Check when the DB property for the diagram type is set to 1.

Database and Field Storage

- **Database: Diagrams**
- **Database: Procedures**

Check when the DB property for the diagram type is set to 1.

Query Manager

- ▶ **MSDLP** - Procedures - Query Manager Querygraphical
- ▶ **MSDLP** - Medications - Query Manager Medications
- ▶ **MSDLP** - Procedures - Query Manager Querygraphical
- ▶ **MSDLP** - Procedures - Query Manager Request History
- ▶ **MS** - Medications - Medication Manager

How to modify common tables list

1. Go to the **Common Tables** window. Double-click the name of the list you want to modify with the required list.
2. Click **Modify Common Tables**.
3. Select the list you want to copy.
4. Click **OK**.
 Please note that this action cannot be undone. The items in the imported list replace any items in the Common Tables list.
5. You can customize the list by adding, not removing items, not changing their order.
6. To save the list and continue working, click **Apply**.
7. To save the list, click **Save**.
8. When you have finished, click **OK**.

MS Tables in a common table list

1. Go to the **Common Tables** window. Double-click the name of the list you want to modify.
2. The **Keywords and procedures common tables** table only:
 - a. In the **Group** box, select a table group to display its items in the **Keywords** box. The possible table groups are as follows:

MS	Shows all items from 15 groups.
MSDLP	For procedures only. Shows items with MSDLP codes. (This option will not be present if your system does not have MSDLP codes or if they have expired.)
Keywords defined	Shows any keyword-specific items your keyword list configured from the MSDLPMS/MSDLPMSMS or MS_PMSMSMSMS table in the MSDLPMS or MSMSMSMS table.
MSMS	Shows items with MSMS codes. (This option will not be present if your system does not have MSMS codes or if they have expired.)
MSMS	Shows items with MSMS codes. (This option will not be present if your system does not have MSMS codes or if they have expired.)
MS not	For procedures only. Shows items reported by the supplier with an "unknown".

■ Editor and Global Content

Operations Windows

1. In the **Type** box, select a global category, such as "header" or "paragraph," to display the items in the **Source** box.
2. If necessary, edit the selection in **Source** then create specific text by entering the text in the **Contenting** text box and clicking **Post**.
3. In the **Source** box, click the object that you want to edit then you want to edit in the **Contenting** window. Items will be edited automatically.
4. To save the list and continue working, click **Apply**.
5. To print the list, click **Print**.
6. When you have finished, click **OK**.

Change the order of content elements

1. In the **Contenting** window, double-click the name of the list you want to modify.
2. To add the element to the top of the list, click it in the **Contenting** box and type the **↑** or **↓** button.
3. To move the element to the top or bottom of the list, click the **↑** or **↓** buttons to move the item to the top or bottom of the list.
4. To save the items in alphabetical order, click **ABC**.
5. To save the list and continue working, click **Apply**.
6. To print the list, click **Print**.
7. When you have finished, click **OK**.

Remove or Add Item to content element list

1. In the **Contenting** window, double-click the name of the list you want to modify.
2. In the **Contenting** window, click the item that you want to remove.
3. Click **Remove**.
4. To save the list and continue working, click **Apply**.
5. To print the list, click **Print**.
6. When you have finished, click **OK**.

■ Events and Gantt Windows

Although the database stores event in logs and the Gantt table is associated using Gantt table, you should use Gantt table to add new events. You can use Gantt table to add, delete or configure the following properties on existing events.

- Events and event types: You can add the in logs of events and event types in the corresponding Gantt table. You can change the settings in the Gantt table properties window of the Gantt table table.
- You can delete individual events and entire event types by selecting the **Remove** check box in a log.

Note: After finalizing an event you should see Customer is notified if that all go event will be added to a feed.

Note: The Professional Page listing, you must make sure that the following events are added: *Breakdown Feed*, *Breakdown Page*, and *Staff Listing Page*.

- **System for events:** When an event with a system is documented, the system appears in the top left. The system can be any single character from the ABC system character set.
Note that by default, the system for the "Interlocking model" automatic system does not exist.
- **Events for breakdown systems:** These events can only be documented by breakdown systems. If a non-supplier administrator, breakdown, the system automatically enters these events using the Suppliers Breakdown Model (SBM).
- **Event page:** You can use to event page consisting of two events: a start event and a end event. These are prevented from documenting all start events unless the associated start event has already been documented. An event that is an event or a performed start is start event is added.

Note: The Professional Page listing system requires an event and consisting of the Breakdown Feed and Breakdown Feed events.

Create or modify an event system

1. In the **Building Tables** menu, create new Events.
2. In the row corresponding to the event, enter the design character in the **System** column, and other areas listed.
3. When you have finished creating and modifying events, click **Done**.

Assign an event for use in SBM

1. In the **Building Tables** menu, create new Events.
2. In the row corresponding to the event, click **Superior**.
3. When you have finished, click **Done**.

Note: Only members of a user group with the system flag "SBM user and staff" can document these events.

Create an event page

1. In the menu, click **Event Page**.
2. In **Event Page**, select the event that must be documented first.
3. In **Event Page**, select the event that must be documented second.
4. Click **OK**.

12 Notes and Clinical Content

Documenting Notes

Note: An event can only appear in one event set. The **EE** button is unavailable if one or more of the selected events already belong to an event set.

Create an event set

1. Click **Event Page**.
2. Select the event set type you want to add.
3. In **Event Note**, select the event that must be documented first.
4. In **Event Note**, select the event that will be documented second.
5. Click **EE**.

Note: An event can only appear in one event set. The **EE** button is unavailable if one or more of the selected events already belong to an event set.

Create an event set

1. Click **Event Page**.
2. Select the event set type you want to add.
3. Click **Event**.
4. Click **EE**.

Patient Summary

The Patient Summary is configured using Customizer. You can use **EE** button to create and configure types of notes that users can add to patients' reports. The **create note type** is using **notes** in the **NotesPage** table.

Sometimes, users are unable to add certain types of notes from the summary. These note types can be configured in **Notes** table using **notes** only or **age** filter only. You can also configure **create note type** in the **properties**. After you select **defaults**, the system displays these notes for a certain period of time and then deletes them. You can configure the period of time to retain the notes.

After you have created a note type, you can define its content by creating note details in the **NotesDetails** table. Note details are in the database with headings that appear in a defined description.

Create or modify a note type

1. In the **Summary Tables** table, double-click **NotesPage**.
2. To create a new note type, click **EE** and then **EE**.
To change an existing type, click the cell containing the text or property that you want to modify.
3. Under **Descriptions**, enter or change the name of the note type, and then click **Save**.

1. Under **Table**, enter a number, and then press return. The number determines the position of the table type in the report table in the report worksheet.
2. Under **Abbrev**, if you do not want table names on the table type in the report on the Clinical Report tab.
3. Under **Exchange**, if you want table names on the table type in the report after the report is exchanged. Under **Drop to Show after Exchange**, enter a number, and then press return. It will be the number of days after exchange the table should be deleted.
4. When you have finished creating and modifying table types, click **Done**.

Set worksheet table names to a table type

1. In the **Inventory Table** window, double-click **InventoryTable**.
2. To create a new table name, click **Add** on the **DB**.
To change an existing table, click the cell next to the table or property that you want to modify.
3. Under **Description**, enter or change the name of the table name, and then press return.
4. Under **TableType**, select the table type in which you want to place the table name.
5. Under **Table**, enter a number, and then press return. The number determines the position of the table name after the table type. If there is only one table name in the table type, the value should be 1/1.
6. When you have finished creating and modifying table names, click **Done**.

Note: The report can be used with table names in the report. If there are multiple table names, you must create separate reports for each table name, even if they have the same report description.

Worksheet Required for Supply Billing

If your system integrates with DB Manager, the system will only include a Supply Log for recording supply and billing worksheet administration. You can configure whether or not the worksheet must first be documented for supplies in the system. The worksheet associated with the requested supply in the order history form window for the supplier that has a clinical role of **Inventory Billing** is **@Worksheet**.

Configure whether or not a worksheet is required for supply billing

1. In the **Inventory Table** window, double-click **Configuration Parameters**.
2. In the **Table** column, click the cell next to the **Worksheet Required for Supply Billing** option.
3. Group B if supplies can be requested without a worksheet being documented.
Group T if supplies can only be requested when a worksheet is documented.
4. Press **Done**.

Rule-Based Notifications for Reports

Configuration

Rule-Based Notifications for reports is configured using Customizer and DB Rules. For more information, see [Rule-Based Notifications for Reports](#) on page 10.

Configure a list of symptoms and test actions

1. Open DB Rules.
2. In the **Available Tables** table, double-click the **Rule Symptom** table.
3. To add a destination, type the table name in the **Destination** cell.
4. To add a new test item, click **add** and then type the test in the **Description** cell.
5. Click **OK** to save the new test item. (You must do this before you can select another cell.)
6. When you have finished adding entries, click **Close**.

Presig Manager

Overview

Content for variable analysis in Presig Manager can be submitted as a global test using DB Rules.

- **Algorithms and Pathways and Prescriptions:** You can customize the “summary sheet” test associated with diagnoses, prescriptions, and algorithms. These tests provide abbreviated versions of the data most commonly encountered in the case notes.

See [Customize Content for Diagnoses, Prescriptions, and Algorithms](#) on page 100.

- **Test Medical History:** Tests in this category medical history in the context of the study for which content was entered. Tests individually or as corresponding studies in Presig Manager. You can designate some sections as required for all patients.

For example, **Demographic Characteristics**, **Medication History**, **Family History**, **Medical History** and **Drug use**.

See [Create a section of the medical history](#) on page 100. **MR** test is defined as a medical history section on page 100.

- Physique Page:** Body weight is the maximum. Physique weight can either appear automatically in the corresponding window. The unit designates unit weight is required for all entries.

For example: *Body and Neck, Pathology, Cardiovascular, Cardiovascular, Sp.*

We create a window in the physical appearance on page 122. **Physique** is defined as a physical appearance window on page 122.

- Examination Page:** Technically, equipment are used to observe all the patient. When created, unit weight appears automatically in the corresponding window in Drug Manager. The unit designates unit weight is required.

For example: *Diagnostic Techniques, Medical Equipment, Skin Observed with Patient*

We add a finding to an examination unit window on page 123.

- Body Measurements:** Unit of unit weight with possible findings for each. Each body is associated with a number of points. The unit weight may include recommendations.

For example:

Body weight without Body Weight

Physique, Pathology, 2 units, Angina stable, Angina unstable, Coronary artery disease, etc.

The Body Section creates finding with variables (e.g. names of the unit system). The Body Section Body Section creates with variables the findings for each body.

We create a unit body for a unit measurement on page 124. **Physique** is defined as a unit body on page 124. **Physique** is a unit body measurement form on page 124.

Note: The unit body uses the name of unit measurement and is not associated with **Physique**. It is not used for unit measurement. The Management Body must not use. For more information, see **Physique** unit measurement on page 124.

- Body Measurements:** The name of a measurement in the patient's number system of each body.

For example: *Body, Finding, Observation*

The Physique Section Measurements creates with variables options for **Physique** values in unit body.

We create Section Table on page 125.

- Drug Instructions:** When the user is asked to enter an order to do a preparation for writing. When created, unit weight appears automatically in the corresponding window.

For example: *ATOP writing with text or writing with no unit when given a given before and created unit body.*

The Physique Section Table writing with variables unit weight and the Physique Section creates with variables options for unit weight.

We create a preparation instruction on page 126.

- Report Status:** List of possible statuses for an evaluation. Users set the status manually. The status is displayed at the top of the evaluation comments and can be used to organize the content of the device window.
 For example: Ready for doctor, Status follow-up, Ready for surgery, Surgery completed.
 The Page Report Status window will supply the values.
 See [Creating an evaluation status](#) on page 125.
- Signature:** Up to eight different types of signatures for caregivers responsible for completing or reviewing all or part of an evaluation. The first signature type you set results in using it again. Change the other of the other evaluation to that **signature** type signature when sections are being input. If the configuration option is set, users can then add other signatures to an evaluation, but not change the data in the affected sections.
 For example: **Offing** or **Resident**, **Warning**, **Review**.
 The Signature Types window will supply values for this option.
 See [Creating a signature type for signature evaluations](#) on page 125.
- Abstract:** Notes that caregivers can add to an evaluation, typically, the notes have effect on final. Caregivers can enter that text in an abstract comments.
 For example: Agree with the team assessment with the following exceptions: all available information gathered, patient is ready for surgery.
 The Abstract Text window will contain all available abstract comments.
 See [Creating a abstract comments for abstracts](#) on page 125.

Medical History Section

Create a section in the medical history

- Click **Question Tables** on the left side of the main window in EMEditor.
- Click on the **Body System Section** on the top of sections when on the right side of the main window.
- Click the **Add** button to add a new row to the table.
- Enter the name of the section and then press **Enter**.
- In the **Body System Section Type** column, select **Section of systems** and then press **Enter**.
- In the **Table** column, enter a value corresponding to the position of the section within a device in the structure and then press **Enter**.

See Also: [Create a new section using the window](#) 125, 126, 127, 128, 129

This step is optional. If you leave the table blank, sections appear in the table they are entered.

- After you have finished adding sections, click **Done**.

Create a finding in a medical history section

1. Click **Assessing Patient** on the left side of the app window in OB Notes.
2. Double-click **Body System Exam Note** on the list of assessment notes on the right side of the main window.
3. Click the **add** button to add a new row to the table.
4. Enter the name of a medical finding and then press **Enter**.
5. In the **Body System Exam** column, select the code of the corresponding section and then press **Enter**.
6. In the **Table** column, enter a number corresponding to the position of the item location to attach to the section and then press **Enter**.
Tip: Include a zero before single-digit numbers (00, 01, 02, ...).
This step is optional. If you leave the table blank, sections appear in the order they are entered.
7. In the **Exam Subelements** column, select the appropriate value **Normal**, **Abnormal**, **Deferred** and then press **Enter**.
8. When you have finished creating items, click **Done**.

Physical Examination Section

Create a section in the physical examination

1. Click **Assessing Patient** on the left side of the app window in OB Notes.
2. Double-click **Body System Exam** on the list of assessment notes on the right side of the main window.
3. Click the **add** button to add a new row to the table.
4. Enter the name of the section and then press **Enter**.
5. In the **Body System Exam Type** column, select **Physical exam** and then **Enter**.
6. In the **Table** column, enter a number corresponding to the position of the section position to attach to the section and then press **Enter**.
Tip: Include a zero before single-digit numbers (00, 01, 02, ...).
This step is optional. If you leave the table blank, sections appear in the order they are entered.
7. When you have finished adding section names, click **Done**.

Create a finding in a physical examination section

1. Click **Assessing Patient** on the left side of the main window in OB Notes.
2. Double-click **Body System Exam Note** on the list of assessment notes on the right side of the main window.
3. Click the **add** button to add a new row to the table.

■ Editor and Clinical Content

Phrase Manager

1. Enter the name of a term finding and then press **Enter**.
2. In the **Find System Name** column, enter the name of the corresponding section and then press **Enter**.
3. In the **Page** column, enter a number corresponding to the position of the term relative to others in the section and then press **Enter**.
Tip: Include a zero before single-digit numbers (01, 02, 03, ...).
 This step is optional. If you leave the value blank, sections appear in the order they are entered.
4. In the **Find Synonyms** column, enter the appropriate section (**Normal**, **Abnormal**, **Deferred**) and then press **Enter**.
5. When you have finished creating terms, click **Done**.

Synopsis Page Section

Create a finding in an synopsis page section

1. Click **Analysis Tables** on the left side of the main window in **Editor**.
2. Double-click **Synopsis Page** on the list of sections under on the right side of the main window.
3. Click the **ADD** button to add a new row to the table.
4. Enter the name of the term and then press **Enter**.
5. In the **Page** column, enter a number corresponding to the position of the term relative to others in the section and then press **Enter**.
Tip: Include a zero before single-digit numbers (01, 02, 03, ...).
 This step is optional. If you leave the value blank, sections appear in the order they are entered.
6. In the **Synopsis Page Type** column, enter the name of the corresponding section and then press **Enter**.
7. When you have finished creating terms, click **Done**.

Preoperative Instructions Section

Create a preoperative instruction

1. Click **Analysis Tables** on the left side of the main window in **Editor**.
2. Double-click **Preop Instructions** on the list of sections under on the right side of the main window.
3. Click the **ADD** button to add a new row to the table.
4. Enter the instruction and then press **Enter**.
5. When you have finished adding instructions, click **Done**.

Record Status Section

Create an indication table

1. Click **Building Tables** on the left side of the main window in IBM Editor.
2. Double-click **Table Record Status** on the list of database tables on the right side of the main window.
3. Click the **Add** button to add a new row to the table.
4. In the **Description** column, enter the indication and then press **Enter**.
5. When you have finished adding indications, click **Done**.

Signatures Section

Create a signature type for signing indications

1. Click **Building Tables** on the left side of the main window in IBM Editor.
2. Double-click **Table Signatures Types** on the list of database tables on the right side of the main window.
3. Click the **Add** button to add a new row to the table.
4. In the **Description** column, enter a name and then press **Enter**.
5. In the **Table** column, enter a number corresponding to the position of the table column to which to be applied, or then press **Enter**.
Tip: Include a new column single digit numbers (00, 01, 02, ...).
This step is optional. If you leave the table blank, signatures appear in the order they are entered.
6. In the **Field** column, enter a checkbox if you want the signature type to be considered as a field signature. (Depending on the configuration, a field signature may have certain attributes.)
7. When you have finished adding signatures, click **Done**.

Note: Up to more than eight signature types should be configured.

Attribute Section

Create a standard comment for attribute

1. Click **Building Tables** on the left side of the main window in IBM Editor.
2. Double-click **Table Attribute Type** on the list of database tables on the right side of the main window.
3. Click the **Add** button to add a new row to the table.
4. Enter a standard comment in the **Description** column and then press **Enter**.

1. In the **Index** column, enter a number corresponding to the position of the item wanted to appear in the list and then press **Enter**.
Tip: Include a zero before single-digit numbers (00, 01, 02, ...).
This step is optional. If you leave the index blank, entries appear in the order they are entered.
2. In the **Flags** column, select **XXXXXXXXXXXX** and then press **Enter**.
3. When you have finished adding comments, click **Done**.

Web Assessment Sections

Create a Web Assessment Type

To add a new Web assessment type, a database administrator must add the assessment directly using an appropriate tool such as Microsoft SQL Server Enterprise Manager.

1. In the Enterprise Explorer **SQL Server Enterprise Manager**, add a new type.
2. One of the new custom event type has the description "Unknown". Copy the GUID for this entry in the new custom type and change the ID flag to 0, where ID is 1, 2, 3, etc. Do not add a name used by another custom type. The GUID must be unique.
3. In the **SQL Server Enterprise Explorer** column, type a description for the new custom type type in the description column in **WebAssess**.
4. In the **WebAssess** column, type "Y".
5. In the **WebAssess** column, type "Y".

Create a Web Section for a Web Assessment

1. Click **Assessment Types** on the left side of the main window in **WebAssess**.
2. Double-click **Web Section Types** on the list of WebAssess entries on the right side of the left window.
3. Click the **Add** button to add a new row to the table.
4. Enter the name of the section and then press **Enter**.
5. In the **Web Section Type Type** column, select a Web assessment type (or then press **Enter**). The new type will appear in any list based on the selected Web assessment type.
6. In the **Index** column, enter a number corresponding to the position of the section wanted to appear in the window and then press **Enter**.
Tip: Include a zero before single-digit numbers (00, 01, 02, ...).
This step is optional. If you leave the index blank, entries appear in the order they are entered.
7. In the **Flags** column, enter the event associated with the Web Section. Note that the maximum event you can have for a Web Section is 4095. The event is added into database when it begins and ending is determined for the Web Section. The Web Section is automatically in the index Web assessment event in the **WebAssess**.

- When you have finished adding section names, click **Done**.

Create a finding for a test factor

- Click **Findings Tables** on the left side of the **Prag** window in IBM Skills.
- Click on the **Findings Tables** icon on the list of sections table on the right side of the main window.
- Click the **Add** button to add a new row to the table.
- In the **Description** column, enter the name of the finding and type your finding.
- In the **Findings Tables** column, select the name of the corresponding section and type your finding.
- In the **Table** column, enter a number corresponding to the position of the test section in which it is the section and then press **Enter**.
The number is zero unless single digit numbers (0, 1, 2, 3, 4, 5, ...).
This step is optional. If you leave the table blank, sections appear in the order they are entered.
- In the **Section Assessment** column, select **Finding** and type your finding.
- When you have finished creating findings, click **Done**.

Create a recommendation for the test table assessment score

- Click **Findings Tables** on the left side of the **Prag** window in IBM Skills.
- Click on the **Findings Tables** icon on the list of sections table on the right side of the main window.
- Click the **Add** button to add a new row to the table.
- In the **Findings** column, enter the lowest value in the score range for the recommendation and then press **Enter**.
- In the **Findings** column, enter the highest value in the score range and then press **Enter**.
- In the **Recommendation** column, enter a recommendation text of up to 255 characters and then press **Enter**.
- When you have finished creating recommendations, click **Done**.

The recommendations are stored at the bottom of a form in the column score for all test factors sections in that form table within the configured range.

How you a recommendation applies to all test assessments having the relevant score. To create an individual recommendation for each test assessment, you must make sure the score for each test factor is such that the combined score will only possibly apply to the assessment in question.

Example: Suppose you have two assessments, each with two test factors. You give a score of 1 to each test factor in the first assessment, giving a possible total score of 2. If you give a score of 1 to each test factor in the second assessment, giving a possible total score of 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30. The only score that can occur is 2.

Create a new not-associated form

The form will appear on the Navigation Bar and as a section of the Summary. Every form essentially consists of the following elements:

- It has a section in the left in **editonly** mode for Customers. (The easiest way to create this is by copying an existing not-associated form section.)

Settings in the section determine the following:

- The section position as the form name in the Navigation Bar and Summary.
- The not-associated type. (To update a new type, see [Create a not-associated type on page 127](#).)
- Whether the form on the left is shown in the editor bar while the form is edited. These are specified in the following table. We using an HTML editor.

Configuration/Position/Settings and

Note: You have to distribute this file to all workstations that will need the new not-associated form.

- How layout, settings and recommendations for the not-associated type that you specified using HTML.

1. Create a section for the new form in Customer

There is no transferring the configuration you create about the HTML of the not-associated type on other page form will be copied. If database administrator will need to modify the HTML in the `ADMINISTRATION` HTML page as the HTML database using an appropriate tool such as Microsoft SQL Server Enterprise Studio.

The following procedure requires the Configuration Editor for Customers. For more information on using the Configuration Editor, see [The Configuration Editor on page 125](#).

1. Open the Configuration Editor for Customers.
2. In the **edit** or **editonly** mode, copy the section as an existing not-associated form and paste it into the edit mode.
It cannot add add if you want to overwrite the existing section.
3. Click **OK**.
A new section will be created.
4. Rename the section (selected) only the file name only appears in Customer, and select the new section in web bar entries in the HTML page.
5. Double-click **Register** and enter an identifier for each register. Do not use spaces.

Note: The identifier only appears in Customer and the language and the not a Page Manager. The most common is to not used in any other sections in the **edit** or **editonly** mode.

Step 1: Create the supplier with "NFI" as address the destination as supplier with an existing entry. For example: "NFI Pharmacy"

1. Double-click **Suppliers** and click on **Supplier** for the entry you want. The pop-up window opens the list you entered for **Supplier** but with **Destination** field at the end. For example: **NFI PharmacyDestination**

Note: The supplier entry appears in **Customers** and the drug go into the **new Drugs Manager**

2. Double-click **DB** and create the **DBID** number

Example:
`customer name: ***** id number: *****`

3. Double-click **DBID** with that of the old ********* type that was provided by the **DBID** as *********
4. Enter the word ********* in **Destination** section to use the address in the right side
5. Double-click **Destination** and add a list entry with the exact name of the new section you created for the form. And the entry in the position that you want the form to appear in the **Navigation** list you *********
6. Double-click **Destination** and add a list entry with the exact name of the new section you created for the form. The position of the entry in the list is not important.

5. Create a table and enter the test for the new drug

1. In **Customers** choose in the following order:
`"DrugTestFormDestination"`
2. Double-click **DB** to change the code by your test table and open it in a test editor or add entry

Example: For all other customers, the test is **DBID** and

3. Search for **Drug Name** *********
4. Add up following test through the **DrugTestForm** code
`Drug Name (Destination) type "DB" value (Form table) is`
 When **Destination** is the code that you entered in **Customers** for the **Destination** entry and **Form table** is the test you want to use in **Drug Manager** to go from one the **Drug Test** ********* and back the test.
5. Add the following test through the **DrugTestForm** code
`Drug Name (Destination) type "DB" value (Status 0: Test) is`

12. Tables and Global Content

Prerequisites

When using Table in the next step you entered in **Business** for the **Integration** entry and **Prereq** listed in the next step is also in **Prereq Manager** for the form and the **Navigation** for **Business** and form like this:

1. Here and click the file

2. Create all tables, findings and recommendations for the new form

- Create all tables, findings and recommendations for the form as needed. For more information see the following sections:
 - Create a table for a new assessment on page 125
 - Create a finding for a new table on page 127
 - Create a recommendation for the new table assessment entry on page 127

Auxiliary Tables Associated with Prereq Manager

Note: Some of these tables are also associated with **Knowledge Manager**, **Policy Manager** and **Global Content Manager**.

Table	Comment
Manager	List of possible entries for a system right now
Manager Type	Manager classification. Examples: Prereq , Assessment
Assessment ID's Type	Table for the Assessment (classified) in Prereq Manager (classified) for entries
Assessment Plans	Group to the Assessment (classified) table in Prereq Manager form for documenting the assessment plan
Assessment Table	Drop-down list entries to Prereq Manager form for documenting the system's output table
Body System Table Entry	Group to the Findings table in the form for documenting physical examinations, health tables and risk assessments
Body System Finding	Group to the Prereq Manager form for documenting physical examinations, medical tables and risk assessments This table only appears in Prereq Manager when tables are added to form in the Body System Table Entry table entry.
Assessment Table	Drop-down list entries to specialized content in Assessment section

Field ID	Comments
Complications	Any items for which the complication is just suggested in the Surgical History section.
Home Medication Preparation	Any items for which the administering medications being used by patient at time of study test in the Home Medications section.
Drug Related Medications	Any items for which the possible preparation relates to tested medications.
Index Test	Any items that in the Tests and Results section.
Risk Assessment Recommendations	Prescribed recommendations associated with usage of possible source in a test assessment. The test appears in the Risk Assessment form. No completion in the assessment.
Risk Type	Complications that make administration source used in test as indicator for user direction.

DB Editor and Note Templates

About Publishing Note Templates

To enable a note template for use at workstations, it must be published using the Notes Manager service in DB Editor. Operators can then create notes based on the template.

Note that the term "publishing" is used in two ways in the Pico Notes System:

1. Publishing a template from Notebook is a distributed network issue to make it available to Notes Manager.
2. Publishing a template from Notes Manager to the database so that it becomes available for use at workstations.

The topic discusses publishing from Notes Manager. The information on publishing from Notebook are in the Pico Notes System in general, please see the [Topic's Design Guide for Notes](#).

Accessing Notes Manager

All users with access to DB Editor can access the Notes Manager service:

1. Open DB Editor.
2. Under **File**, click **Notes Manager**, or click the Notes Manager toolbar icon.

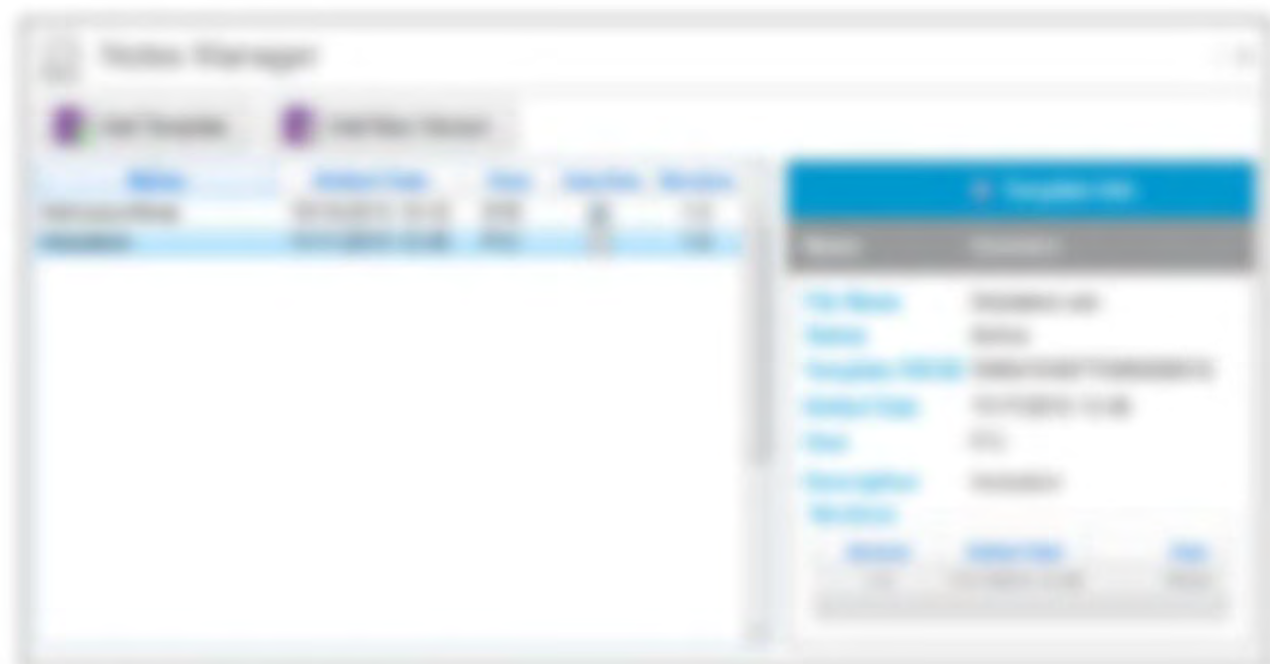


Figure 13 The Node Manager window

Publishing a New Node Template

Publishing a node template makes it available in the Node Editor window as a connection.

Note: Any template that you created is displayed in Node Editor even if you later modified it.

1. On the Node Manager toolbar, click **New Template** and specify the requested information:
 - **File path:** select the source code and move it to the shared resources folder where the template file is stored. (Template files have the extension `.xml`.) Select the template file if you want to make available.
 - **Name:** enter a name to identify the template in the Node Editor. (Different versions of a template appear the same name.)
 - **Description:** enter a description for the template. This description is shown in the toolbar for the template in Node Editor.
2. Click **OK**.
Node Manager uploads the template to the database. After uploading finishes, the new template is shown in the Node Manager template list.

Upgrading an Existing Note Template

You can create a new version of an existing template.

- In Studio Editor you can only create new notes with the latest version of a template.
- Notes created with any old version kept in accessible for editing and export in Studio Editor.

Upgrading a template is a two-stage process. First you publish a new version of the template using **publish**, and then you use **Note Manager** to make the new version available at organizations.

Stage 1

1. Open the existing template in **Studio Editor** mode (for example, **MyTemplate.vnt**).
2. Update the template as required.
3. Click **File**, click **New**  and open a new panel to open the template. For example, **MyTemplate.vnt**.

Note: The new version template file name must be unique. It cannot have the same file name as any template already in the **File Name System**.

4. Publish the new template to **publish**.

Note: For the updated version of **publish**, see the **Release Notes**.

Stage 2

1. In the **Note Manager** list of templates, select the template you want to upgrade.
2. On the **Note Manager** toolbar, click **New New Version**. The **Template Properties** window appears.
3. In the **File path** property, click the folder icon.
4. Browse to the new version of the template file in the file system (for example, **MyTemplate.vnt**), click **OK** and **publish**.
The name is not editable - it is the same name as the template you want to upgrade.
5. Click **OK** and click **OK**.
 - The edited template file is published to the database.
 - After the upload completes, the new template version appears in the **Note Manager** template list.

IBM iSeries and Note Templates

Activating a Template

Note: If you view **Note Template** content in **Note New Session** in the first step, the new version of your template is added as a new template in Notes Manager. If this happens, you must manually go to template version so that each user can create new notes that is.

For more information, see the **Template Quick Guide for Notes**.

Deactivating a Template

If you no longer want users to be able to create notes from a particular template, you should deactivate it. Deactivating a template does not affect notes you have already sent, either with that template. Draft notes can still be edited, saved, and finished. Draft notes can still be saved and have comments applied to them.

Note: Any notes that are created in **Deactivate** in Notes Editor will still be able to deactivate it.

1. In the Notes Manager list of templates, select the template you want to deactivate.
2. Select **Deactivate** for the chosen template.

Common Choice Lists for Notes

A note template can include sections and drawing data from predefined variables or drawing components. When creating a note the list will default to common choice list and will be available for the user to fill in.

Common choice lists are defined in IBM Notes.

To create a common choice list for notes, see the **Creating** menu, and **New Common Choice**.

Note: The system creates a common choice list after it has been created.

To add a common choice list for notes, select the **Common Choice** menu in the main window. The right pane shows all common choice lists. Common choice lists for notes begin with the **COMMON** choice and the common choice list that you want to add.

Note: Although common choice lists for notes are processed by the Common Choice menu and the list lists for diagrams, attachments and drawings, they are not for different and cannot differently.

Common choice lists for notes are available in all environments.

Laboratory Components

To create a common choice list of laboratory components, click **Laboratory** at the top of the Common Choice window.



- **Top left pane:** lists up available items. The right pane lists items that have been selected for the common choice list. To select an entry, click the **Select** check box next to it. The item moves to the right pane. Items are added to the pane in the order they are selected.
- **Remove:** Removes the selected item from the right pane.
- **Clear:** Removes all items from the right pane.
- **Up and Down:** moves (changes up and down) on the right pane. This changes the order in which the data is displayed in the table.
- **OK:** Saves the common choice list and closes the window.
- **Cancel:** Closes the window without saving.

A

Appendix A: Report Templates (RPT files)

Creating Report Templates

Note: Besides creating new user-defined Report templates, Policy Hub has a number of standard templates available for you to use. Please contact your Pricer representative for more information.

Report templates should be created using Crystal Reports. It is highly recommended that you are experienced with the Pricer database structure, as well as Crystal Reports.

It is very important that the following fields for parameters are present in the report document and are formatted as used in standard Pricer for report templates as needed:

- `@@@userdefined`
- `@@@report` (only if the report is pulled from Headquarters Manager, Policy Manager or Global Case Manager. Note that the parameter code will always start with an @-character.)
- `@@@userdefined`
- `@@@report`
- `@@@report`
- `@@@`
- `@@@report`
- `@@@`
- `@@@report`

[illegible]

NOTE: The cost of your first semester starts in the April report sheet. The amount of the cost is what you charge yourself.

Figura 10.10: Um plano de corte de um sólido. O plano de corte divide o sólido em duas partes, uma superior e uma inferior. O plano de corte é perpendicular ao eixo de simetria do sólido.

It is important that you take time to complete questions. If you do not complete questions, you cannot receive a certificate. Please do not rush and do your best.

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Results are interpreted as two different behavioral configurations. For example, the result may give a positive test across conditions and points to the 1980 scenario with a stronger test if the result has a positive condition and points to the 1980 scenario.

Appendix B: Report Templates (RPT) Files Creating Report Templates

Flow statements must be included with report procedures. The statements must be placed within the report procedure itself, rather than within a Flow Statement section itself, when the report procedure is added to the report. All report procedures, flow statements, and flow rules must be type-indifferent, and are implicitly read-only in their use. The statements must be used using the following syntax:

```
for <statement> in <statement> do, <statement> <statement>, <flow>, <flow>
```

Note that the syntax of the end use is follows: single quote then double quote then single quote then comma then space then two single quotes.

The following example shows a report procedure in which the Flow statement has **FlowStatement** as its definition, flow rule, and flow code.

```
report procedure in <statement>
```

```
  -- <statement> --
```

```
  <statement> in <statement>
```

```
do
```

```
  <flow>
```

```
  -- <statement> --
```

```
for <statement> in <statement> do, <statement> <statement>, <flow>, <flow>
```

```
  -- <statement> --
```

```
  <statement>, <statement> <statement>, <statement> <statement> -- <statement>
```

```
do
```

Statements that have been added to the report as part of a report procedure appear in Flow Statements, with an **if** statement, at the beginning of the code. Because of this it is important to add to have the same statement appear twice in Flow Statements, like this:

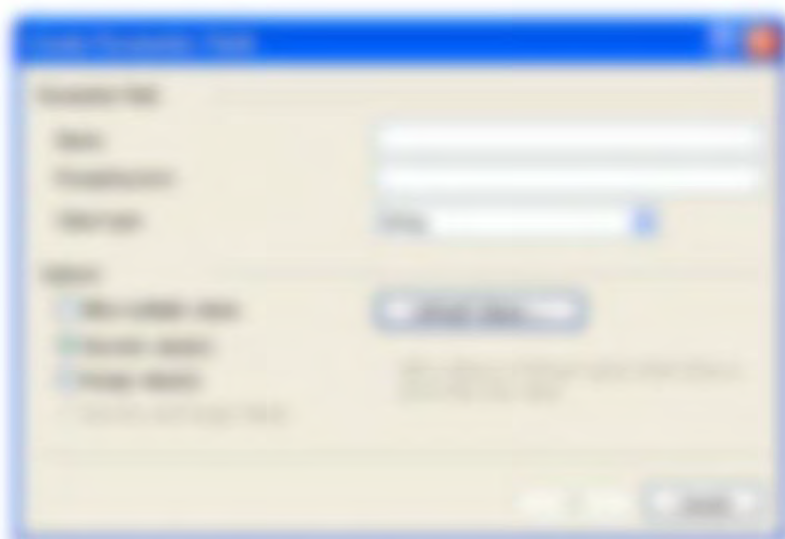


The statement above the Flow Statement section of report flows, that allows may be modified.

The following procedures for creating Flow statements and finding them in report elements provide more guidance only. For more information on creating a report, please contact your documentation help, that comes with Report Reports.

Creating a Flow statement field

1. In the Flow Statement application, **Flow Statement** fields are used flow. It should look in the following syntax:



This window shows the Report Template window of the Report. The window may be modified.

1. In **Name**, give the report name according to the application and the list near the beginning of the window. For example, **Report00000**.
2. In **Format type**, select "Number" if the parameter is a NUMBER otherwise select "String".
3. Leave the other settings as they default unless you want **OK**.

How a **Print parameter field** is a report

1. Right-click the entity that you want to send to a **Print parameter field** and then click **Print Report**.
2. In the window that opens, click **Show Formula**.
It will open a window of the formula of the window.
3. Click **Formula Editor**.
4. In the left pane of the window that appears, click **Report Selection**.
5. In the right pane, enter the formula for the report element.
6. The **Print parameter field** will be a field for the data returned by the formula.
To do this add an equals sign to the right of the formula followed by `<parameter>`.
If **Print parameter field** is a NUMBER it must be kept with the `<field>` as shown in the following example:

```
<field> <parameter> <parameter> <field> <parameter>
```

In this example `<field>` is the setting, `<parameter>` is the **Print parameter field** and `<parameter>` is the **Print parameter field**.

Note: If the **Print parameter field** is the name of a parameter in the **Print Report** window it is used in a report.

Appendix B: Report Templates (RPT) Files Installing Reports

Link a report or sub-report to a specific window

1. Open the report or sub-report.
2. In the **File** menu, right-click **Reportable Fields** and select **New**.
3. In **Name**, type the desired name.
4. In **Value type**, select "String".
5. Click **Default Values**.
6. In the window that appears, type the window name (for example, **RRR**) in the left pane and the **Select an order value** and click it to move the value to the right pane.

Note: You should only define a single value.

7. Click **OK** to return to the report window.
8. Save the other settings at your default value and click **OK**.

Installing Reports

To be available to all users, reports (RPT) files must be installed within security of the workstations that need them or in a shared network folder. For more information, see [Security](#), page 173.

Note: The report names that are used are the filenames that define the RPT extension.



B

Appendix B: Global Configuration Parameters

About Global Configuration Parameters

The following table lists the parameters in the Configuration Parameters window with its identifier. Most parameters are described in this guide. In some cases, some differences are included. Parameters related to specific interfaces are described in the interface documentation.

Names are sorted by their OMNI system identifier number.

Configuration Parameter	Where it is described
API endpoint	Documentation for the API endpoint interface
AuthenticationKey (defined in Proxy Setting)	Not used in this version
authentic: enableProxyAuth	Security Services Authentication on page 175
enable-connection-log	Not used in this version
enable-connection-log-path	Not used in this version
enable-logging-log	Not used in this version
enable-ssl-log	Not used in this version

Configuration T-number	Where is it located?
enable automatic log	Not used in this version
enable system log	Not used in this version
enable system log level	Not used in this version
enable user log	Not used in this version
enable user log auto	Not used in this version
get interface ipa ipaddress hostname	Not used in this version
hostname built-in	Search at page 275
hostname change name	Search at page 275
hostname domain flag	Search at page 275
hostname ipa flag	Search at page 275
show interface language code	Configuration at page 275
show show monitor	For internal use only. Do not modify.
enable creation of system from built flag	Search at page 275
ssh server	Not currently used. Reserved for future use.
enable trustful use action	For internal use only. Do not modify.
to use changePassword action	For internal use only. Do not modify.
enable trustfulPassword action	For internal use only. Do not modify.
to use trustfulPassword action	For internal use only. Do not modify.
show to enable built setting for interface flag	Not currently used. Reserved for future use.
operation checking (enable strong Password action)	Not used in this version
operation checking enabled	Not used in this version

Appendix B Global Configuration Parameters

About Global Configuration Parameters

Configuration Parameter	Where to Use the Parameter
authentication: checking: security: type	Not used in this version.
key: file: setting	Security: Service Authentication, on page 175
authentication: type	Security: Service Authentication, on page 175
authentication: type: type	Security: Service Authentication, on page 175
authentication: type: type	Security: Service Authentication, on page 175
authentication: type: type	Security: Service Authentication, on page 175
key: number: of: key: pairs: when: set: is: used: to:	Security: Parameters, on page 175
name: of: key: integration: (K: Storage: file: to:	Not used in this version.
password: expiration: period: is:	Security: Parameters, on page 175
password: is: when: length:	Security: Parameters, on page 175
password: minimum: length:	Security: Parameters, on page 175
password: must: be: alphanumeric:	Security: Parameters, on page 175
password: when: must: expire:	Security: Parameters, on page 175
file: extension: value:	File: Documentation
url: to: use: Remote: endpoint:	Security: Reference: Guide
key: integration:	Not used in this version.
key: to: use: Remote: endpoint:	Not integrated yet only. Do not modify.
key: to: use: Remote: endpoint:	Not currently used. Referenced for future use.
key: to: use: Remote: endpoint:	Not currently used. Referenced for future use.
key: to: use: Remote: endpoint:	Not currently used. Referenced for future use.

Configuration / Feature	Where is it described?
OneDrive OneDrive client for Windows 10	Not currently used. Replaced by OneDrive web.
OneDrive syncing through the network service. Windows 10 storage. In the old system only.	This capability has been replaced by the OneDrive web and is now disabled. This is not used in Office 365. For the new system, OneDrive web (OneDrive Storage) is used (20).
OneDrive syncing through the network service. In the old system only.	Replaced by OneDrive web (20).
OneDrive is connected with the network service.	Replaced by OneDrive web (20).
OneDrive web service	Documentation for OneDrive integration.
OneDrive web service (disabled)	This capability was replaced by the OneDrive web service (20) and is now disabled.

The following table shows all names in the Quarterly Names column of the Index.

- [illegible]

Appendix C: Auditing Database Tables

List of Auditing Database Tables

- [CARS](#)
- [CARS_TYPE](#)
- [CARS2](#)
- [CARS3](#)
- [CARS_ATTRIBUTES_RECOMMENDATIONS](#)
- [CARS_TYPE](#)
- [CARS2](#)
- [CARS3](#)
- [CARS4](#)
- [CARS5](#)
- [CARS6](#)
- [CARS7](#)
- [CARS8](#)
- [CARS9](#)
- [CARS10](#)
- [CARS11](#)
- [CARS12](#)
- [CARS13](#)
- [CARS14](#)
- [CARS15](#)
- [CARS16](#)
- [CARS17](#)
- [CARS18](#)
- [CARS19](#)
- [CARS20](#)
- [CARS21](#)
- [CARS22](#)
- [CARS23](#)
- [CARS24](#)
- [CARS25](#)
- [CARS26](#)
- [CARS27](#)
- [CARS28](#)
- [CARS29](#)
- [CARS30](#)
- [CARS31](#)
- [CARS32](#)
- [CARS33](#)
- [CARS34](#)
- [CARS35](#)
- [CARS36](#)
- [CARS37](#)
- [CARS38](#)
- [CARS39](#)
- [CARS40](#)
- [CARS41](#)
- [CARS42](#)
- [CARS43](#)
- [CARS44](#)
- [CARS45](#)
- [CARS46](#)
- [CARS47](#)
- [CARS48](#)
- [CARS49](#)
- [CARS50](#)
- [CARS51](#)
- [CARS52](#)
- [CARS53](#)
- [CARS54](#)
- [CARS55](#)
- [CARS56](#)
- [CARS57](#)
- [CARS58](#)
- [CARS59](#)
- [CARS60](#)
- [CARS61](#)
- [CARS62](#)
- [CARS63](#)
- [CARS64](#)
- [CARS65](#)
- [CARS66](#)
- [CARS67](#)
- [CARS68](#)
- [CARS69](#)
- [CARS70](#)
- [CARS71](#)
- [CARS72](#)
- [CARS73](#)
- [CARS74](#)
- [CARS75](#)
- [CARS76](#)
- [CARS77](#)
- [CARS78](#)
- [CARS79](#)
- [CARS80](#)
- [CARS81](#)
- [CARS82](#)
- [CARS83](#)
- [CARS84](#)
- [CARS85](#)
- [CARS86](#)
- [CARS87](#)
- [CARS88](#)
- [CARS89](#)
- [CARS90](#)
- [CARS91](#)
- [CARS92](#)
- [CARS93](#)
- [CARS94](#)
- [CARS95](#)
- [CARS96](#)
- [CARS97](#)
- [CARS98](#)
- [CARS99](#)
- [CARS100](#)

D

Appendix D: Supported CNL Codes & Laboratory Components for Rule-Based Sepsis Notifications

This appendix shows the supported laboratory components and CNL codes the dashboard generates that can be used in a laboratory alert rule. For more information, see [Using Sepsis Notifications for Alerts](#) on page 22. [APP: Using Sepsis Notifications for Alerts](#) on page 22.

Each section provides a list of CNL codes that can be used for the variables in queries. While each list, the codes are sorted. If data is provided for more than one CNL code, the notification system uses the highest ranked CNL code.

Note: Most and many items are omitted for reference purposes only. These values depend on the configuration of each hospital.

Acute Care Tests

1. 201-100 Acute Care
2. 201-171,201-180 Acute Care from ADP
3. 201-170,201-180 Acute Care from Laboratory
4. 201-170,201-180 Acute Care from ADP from
5. 201-170,201-180 Acute Care from ADP
6. 201-180,201-180 Acute Care from ADP
7. 201-180 Acute Care from Laboratory
8. 201-171,201-180 Acute Care from Laboratory
9. 201-170,201-180 Acute Care from Laboratory
10. 201-170,201-180 Acute Care from ADP from Laboratory

Appendix B: Suggested O&E Codes & Laboratory Components for Risk-Based Report Modifications

- 6. 100 g/L in Region 10 & 100 g/L in 10
- 7. 100 g/L in Region 10 & 100 g/L in 10

Respiratory Rate

- 1. 100 Day, 100 Month Respiratory Rate per week
- 2. 100 Day, 100 Month Respiratory Rate
- 3. 100 100 Respiratory Rate Rate
- 4. 100 100 100 Respiratory Rate
- 5. 100 100 100 Respiratory Rate
- 6. 100 Respiratory Rate Rate

Rate

- 1. 100 100 100 100
- 2. 100 100 100 100 100 100
- 3. 100 100 100 100
- 4. 100 100 100 100 100 100
- 5. 100 100 100 100 100

Temperature

- 1. 100 100 100 100 100 100
- 2. 100 100 100 100 100 100
- 3. 100 100 100 100 100 100
- 4. 100 100 100 100 100 100
- 5. 100 100 100 100 100 100
- 6. 100 100 100 100 100 100
- 7. 100 100 100 100 100 100
- 8. 100 100 100 100 100 100
- 9. 100 100 100 100 100 100
- 10. 100 100 100 100 100 100
- 11. 100 100 100 100 100 100
- 12. 100 100 100 100 100 100
- 13. 100 100 100 100 100 100
- 14. 100 100 100 100 100 100

Appendix B: Supported OMS Codes & Laboratory Components for Rule-Based Report Notifications

- (c) 401 TAPPAH Testing Temperature
- (d) 401 TAPPAH Temperature Report Code
- (e) 401 TAPPAH Temperature Report Photograph
- (f) 401 Temp Tempert

Laboratory Results

For the following Laboratory Components below, the results provided as Lab Components will not exist:

- Lecithin with 40140 ~~XXXXXXXXXXXXXXXXXXXX~~
- Phospho with 40140 ~~XXXXXXXXXXXXXXXXXXXX~~
- MAG with 40140 ~~XXXXXXXXXXXXXXXXXXXX~~
- Bran Monograph with 40140 ~~XXXXXXXXXXXXXXXXXXXX~~

Best Practices

Separate these components with new analysis called "Report"

1. In the Analysis table, add the column "Report"
2. In the Photo table, add the col "Report" associating it with the "Report" analysis
3. In the Lab Component table, add the following rows:

Report	Lab Component
Report	Lecithin
Report	Bran Monograph
Report	MAG
Report	Phospho

E

Appendix E: Localization

About Localization

This provides options of **Free Storage**, **Readwrite Storage**, **Write Storage**, **Write Only Storage**, and their associated configuration tools in various languages.

The test "string" needed for these languages are already included in the installation, but need to be modified by editing a configuration file and code.

Note: The above tools are only available in English.

After installing the software and installing the language, some elements of the system will appear in English only. In addition, some of the software is 100% localized installation, some items in the default language must be modified or removed.

For an easier between supported languages using the Configuration Editor. [Click This Configuration Editor on page 25-2](#)

Source	Tool	Resource	Entry
Language	Project	Language	Resource

Appendix E Localization

Template Name to Translate

Template Name

This template is for drug up titration.

Example: The template needs to be 40%.

The list of supported languages depends on the software version. Please consult the Software Name for more information.

Template Name to Translate

The following table corresponds to parts of the patient user that are defined in the sample content template.

- Name of custom treatment and needs. Names for the four types of treatments are part of the standard interface.
See [Customize a new custom treatment and set needs properties in page 155](#). [40%](#) (needs to add a need for use of new treatment) in page 155.
- Name for custom content depends.
See [Customize a new custom treatment and set needs properties in page 155](#).
- Name of items, and their programs and images.
See [Change a new custom treatment and set needs properties in page 155](#). [Customize a new custom treatment and set needs properties in page 155](#). [40%](#) (needs to add a need for use of new treatment) in page 155.
- Update the all buttons.
See [Set the properties of buttons in the form editor in page 155](#).
- Title, section headings, or description text for all treatments.
See [Customize a new custom treatment and set needs properties in page 155](#). [40%](#) (needs to add a need for use of new treatment) in page 155.
- Treat items and the needs for pharmacy variables in the legend.
See [Customize a new custom treatment and set needs properties in page 155](#).
- Name of New Type in the Patient Summary.
See [Customize a new custom treatment and set needs properties in page 155](#).
- The patient and prescriber instructions in Pharmacy Management.
See [Pharmacy Management Configuration in page 155](#).

F

Appendix F: Improving Access to Pico Products

Configuring Easy Access to Pico Products



You can add Pico application icons to the bottom of the desktop to make the products more accessible.

[Add a Pico application icon to the desktop](#)

- Click **Start**, find your application icon, right-click the icon, and then click **Pin to Taskbar**.
→ [Go to the next step](#)
- Drag the program's shortcut from the desktop or Start menu to the desktop.

See the operating system help file for more information.



G

Appendix G: Locally-Stored Configuration Settings

About Locally-Stored Configuration Settings

Configuration files are stored in the address. The address of a resource, not just configuration settings. However, some configuration settings controls to be stored locally at each workstation or device.

Setting Type	File	Notes
Language that is installed on the device	Software\Microsoft\Windows\Language	Language is not stored in the address. It is a system-wide setting that is stored in the registry. The address of the language is stored in the registry.
	Example: Setting that is stored in the file	Example: Setting that is stored in the file

Appendix B: Locally Stored Configuration Settings

About Locally Stored Configuration Settings

Setting Type	File	Notes
Device status	Device status files are in the following folder: %ProgramData%\Powershell\DeviceStatus	
Feature-based settings	%ProgramData%\Powershell\featurebasedsettings	
File-based settings	%ProgramData%\Powershell\featurebasedsettings	File-based settings are stored in the following folder: %ProgramData%\Powershell\featurebasedsettings
Other system settings	For example, the settings extension (SEXT) is in the following folder: %ProgramData%\Powershell	Other system settings are stored in the following folder: %ProgramData%\Powershell

Using the Export Tool

Start the Export Tool

1. At sign in to the Test Center of the PACE installation using Windows Explorer.
2. Double-click the file ExportTest.exe.
3. Get to the Export Tool.

Export Tool

Please complete the information below and click Export.

Name

Your name (optional): Email:

Company

Company: Department:

Phone

Phone: Fax:

Address

Address: City:

State

State: Zip:

Country

Country:

Website

Website:

Email (optional)

Email (optional):

Phone (optional)

Phone (optional):

Fax (optional)

Fax (optional):

Address (optional)

Address (optional):

City (optional)

City (optional):

State (optional)

State (optional):

Zip (optional)

Zip (optional):

Country (optional)

Country (optional):

Export **Cancel**

Example of the Export Tool window

Notes

- All fields in the window are mandatory.

Appendix B: The Report Tool for Quality Measures

- The “Report” tool is populated with all forms for which data has been at least one submission, including selected flags.
- After selecting a form, the “Report” tool is populated with all entries on the selected form and which have the date of last one submission.
- The “Report” tool has fields defining the date range for the report.
The report includes only those submissions associated with an encounter that ended within the selected date range.

Example: A form is submitted on January 1 and the same encounter ends on January 15. In the Report tool, the “To” date is set to January 15. Result: The submitted form is not included in the RRS report.

Tools > RRTM > complete RRS report

1. Select a form
2. Fill in all other fields
3. View Report
4. Choose to go to the screen where you want to view the list
5. View Data

The report is saved with a high-risk completion filename.

Example: `HighRiskRRS_20200101-20200115_20200101-20200115.pdf`

A

active light, see **light**

AndroidManager 30

Android 30

Context 30

FragmentManager 30

Intent 30, 31, 32

Parcelable 30, 31, 32

Serializable 30

TaskManager 30, 31

Task 31

active light, **system configuration**

Context 30

Intent 30

FragmentManager 30

Intent 30

TaskManager 30

active, **type annotation setting** 3

APIs

API 30

Annotation 30

Context 30

Intent 30, 31, 32

Parcelable 30

Serializable 30

APIs, **type**

Intent 30, 31, 32

Task 31

API, **annotation**

API 30

Context 30

Intent 30, 31, 32

API, **annotation, **type****

API, **annotation, **type, **annotation******

API, **annotation, **type, **annotation**, **type******

API, **annotation, **type, **annotation**, **type**, **annotation******

API, **annotation, **type, **annotation******

API 30

API, **annotation, **type, **annotation**, **type**, **annotation******

API 30

API, **annotation, **type, **annotation******

API, **annotation, **type, **annotation******

API 30

Context 30

Intent 30

Intent 30, 31, 32

Intent 30, 31, 32

Intent 30, 31, 32

Intent 30, 31, 32

API, **annotation, **type, **annotation******

API 30

API, **annotation, **type, **annotation**, **type**, **annotation******

API, **annotation, **type, **annotation**, **type**, **annotation******

API, **annotation, **type****

API 30

API 30

- area codes 100
 - formulas for 200, 216, 221
 - IP numbers 100
 - ISAP/TN numbers 100
 - ISDN numbers 100
- device configuration
 - device types 100
 - communication tables 200, 216
 - data collection intervals 110
 - device communication tables 216, 226, 230
 - drivers for devices 101
 - editing of data 100
 - identifying devices 100
 - variables, identifying 101
- device data set for edited parameters 100
- diagnostics
 - device protocols 100
 - control devices for 100
 - control data storage 100
 - testbed setup 100
- diagnostic tools
 - API references 1, 216
- diagnostics: tools that require logs 216, 226
- logs shown to testbed users 101
- double master of master device host
 - Tab 211, 220
- dumping parameters 100
- dumping, automatic 100
- dumping tables
 - references 101
 - setting 111
- documenting tables
 - device types 101
 - editing in testbeds 101
 - print after monitoring tables 100
- DynamicResource parameter 100
- documenting tables
 - API references 100
 - device IP tables 101
 - device IP in debugging 100
 - device ranges in tests 100
 - link to documenting sets 100
 - link to documenting sets 100
- edges
 - variables, identifying in logs 101
 - variable reference logs 100
- edges: the device 110
- E**
- for device system logs 100
- for device system logs 100
- for IPN system logs 100
- for test data parameter 100
- edges
 - device logs 100
- Emergency Data Resource parameter 110
- emulation logs
 - control devices 216
- emulation
 - emulation 1, 216
 - emulation 100
- Emulation Type Group, Building
 - Table 211, 220
- Emulation Type, Building Table 211, 220
- emulation type, parameter
 - API 101
 - emulation 100
 - emulation 100
 - in testbeds 100, 100

- [illegible]

- creating 260-261
 - initializing object 167-168
 - inserting in database 167
 - update 168
 - view ranges in table 165, 166
 - view 266-267, 167, 168
 - viewing records 166
 - view 266-267, 167-168
 - insertion in database 165
- File Backend 145
- File Type, Backend Table 265
- Form, Backend Table 265
- Form Backend (or File) writing to
 - object parameter 145
- Frontend user, insert 145
- Form File parameter 145
- F**
- Flagged Data Base
 - in Backend 145
- get data, mode 145
- G**
- Health/Prescription/History parameter 145
- Index parameter 145
- 100 gpa
 - Demographic 145
- Form Backend/Prescription, Backend
 - Table 265
- Form Backend configuration 145
- Health configuration 145
- Health/Prescription parameter 145
- Health/Prescription/History parameter
 - Table 145
- I**
- Index
 - Index information Base 145
 - Index of the data parameter 145
 - Index table, displaying the data 147
 - Index/History/Prescription parameter 147
 - Index parameter 145
 - Index/Prescription parameter 145
- J**
- Key mode 145
- L**
- Link in Backend 147
- Medical analysis
 - Index parameter 265
 - Index 265
 - Link mode in Backend 265
- Medical and Diagnostic mode 265
 - Index 265
 - Index 265
 - in Backend 145
- Medical table 145
 - Link mode of data in data 265
- Medical Table Status, Backend
 - Table 265
- Medical Backend 145
- Medical/Prescription parameter 145, 265
- Medical Form, Backend Table 265
- Medical, index
 - Index 265
 - Index 265
 - Index 265
- Index mode, Indexing 265

Percentage variables

about 14, 15
 answer again to asking 25
 can't understand 15
 coming forward 15
 don't understand about 15
 don't know 15
 answer the second question 25
 answer the question 15
 asking about 15
 asking someone else 15
 finished answer 15
 how about 15
 I believe 25
 shouldn't understand 14, 25
 answer the question 15
 can't understand 15
 Please continue 14, 15
 Percentage variable finished 15
 understand 15
 finished 15
 asking someone 15
 the topic 14, 15

Percentage variable, further Table 25
 14, 25

Please continue, further Table 25
 14

Please change 15

about 15
 answer again 25, 25
 answer 15, 15
 finished 15, 25
 answer about 15
 I believe 15
 shouldn't understand 25
 how understand 25
 finished 15
 Please wait 25

Please wait answer 15
 please understand 15, 15
 Please understand again 25
 answer 15
 answer 15
 I believe 25, 25, 25
 answer 15, 15
 answer again 25

Please change the answer again 25

Please change, understand, further
 Table 25, 25

Please continue again 25

Please answer the 15 question again 25

Please answer the 15 question again 25

Percentage variable again

asking 25
 understanding 15
 answer 15, 15, 15
 asking 15, 25

Percentage variable/understanding
 answer 15

Please continue, asking a question 25

Please understand the question 15

asking 15, 25

Answer

about 15
 understanding to understand 25
 15
 answer again 25
 finished answer again 25

Please change 25

understand

answer about 15
 finish the change 15

- Range to calculate after setting up
the parameter 106-107
 - Range to describe when after type
being added 8 parameter 107
 - Range to describe when after type
being added 107 parameter 107
 - Range to understand the unit
parameter 111
 - range
 - calculator 106
 - change being type 106
 - being work 107
 - time communication time 106, 110
 - describing when being added work
see 107
 - being addition 107
 - related, unit
 - time 107, 110
 - being to that extremely 106
 - being 106
 - time 106
 - being 107
 - being 107
 - to indicate when 106
 - being 107
 - being time 106
 - setting a rule template 106
- S**
- to indicate, parameter
 - time 107
 - being 106
 - being 106
 - being 106
 - to be 106, 106
 - unit to 107-108
 - Set (unit, configuration) 106
 - Settings/Parameter parameter 107
 - summarized see 110
 - Survey Status, further Table 106
 - reference, variable in Report Summary 106
 - what rule, when 107
 - spiral when 110
 - time, when in pattern 8
 - standing, further 106
 - split, split 106
 - split
 - calculator to Time Storage 106
 - being 106
 - split, configuration 110
 - time and configuration 106
 - status, see 110
 - multiple, further 106
 - being 106
 - time, see 106
 - being 106
 - time 106
 - being 106
 - status, further
 - time 107
 - status, see
 - time 106
 - being further 106
 - to further 106
 - See Assessment Recommendations, for
see Table 107
 - State, to, when parameter 106
 - State Type, further Table 106, 106, 107
 - State, further Table 106, 106

estimated configuration
estimated log-lik. 176

