LAWSON®

Surgical Instrument Management User Guide

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Lawson Supply Chain Management

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Chapter 1

Overview of Surgical Instrument Management

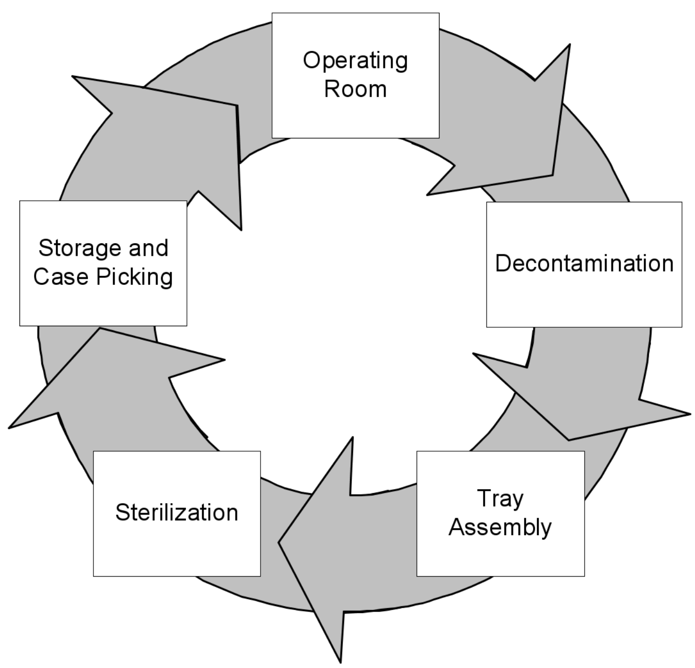
The Lawson Surgical Instrument Management (SIM) application enables hospitals to track surgical instruments and trays throughout their life cycle from procurement, to assembly, packaging, sterilization, storage, distribution, and utilization. You can use SIM to better manage and track instruments and trays. The application improves operation standardization and staff effectiveness.

The Surgical Instrument Management application integrates web browser terminals/workstations with wireless handheld devices, application servers, and database servers to provide up-to-date monitoring and tracking of instruments.

What Is the Surgical Instrument Life Cycle?

SIM tracks surgical trays throughout their life cycle. After the trays are used in the operating room, Sterile Processing departments typically divide into four areas to accomplish the following functions: decontamination, tray assembly, sterilization, and sterile storage and case picking.

Figure 1. Procedure flow: Surgical Instrument Life Cycle



Operating Room

Managing the sterile surgical instruments for the OR is the primary function of the Sterile Processing Department (SPD). Surgical instruments arrive at the OR in trays with count sheets that detail the quantity, type, and exact order of the instruments in the tray. OR personnel use count sheets to count the instruments before and after surgery. After the completion of surgery, OR surgical technicians count all used and unused instruments recorded on the count sheet. Support staff transport the instrument trays in carts to the decontamination area often via dedicated “dirty” elevators.

Decontamination

The purpose of decontamination is to clean the blood and tissue off the instruments and trays by means of manual or mechanical cleaning and chemical disinfection. This general decontamination does not sterilize the instruments, but makes them safe to handle by SPD technicians.

Tray Assembly

The purpose of tray assembly is to assemble trays of surgical instruments for specific surgical procedures for use in OR. As trays come out of the tunnel washer in decontamination, trays and instruments then move to the tray assembly area. Instruments arrive in a jumble. SPD technicians place the instruments onto a table at a workstation and use assembly instructions on tray lists to place the instruments in a precise order. After assembling the tray, the technician wraps the tray in cloth or places the tray in a metal container in preparation for the next stage of the instrument life cycle—sterilization.

Sterilization

After tray assembly, SPD technicians place surgical instrument trays on racks to move into sterilizers for sterilization. Properly sterilizing the instruments with the correct methods and duration ensures sterility for patient safety and that the instruments are not damaged.

Storage and Case Picking

After sterilization, trays are then moved to a storeroom area, often located near the OR. Surgical sets may sit in storage for a few days or for as long as two years. When trays are needed for a case, the OR indicates what trays and other items are needed for an operation on a pick list. SIM users pick the trays then move the case carts containing instrument trays to the OR where the instrument life cycle starts all over again.

How Surgical Instrument Integrates with Other Lawson Applications

This section explains how the Lawson Surgical Instrument Management application interfaces with other Lawson applications.

Inventory Control (IC)

The Surgical Instrument Management application and Lawson Inventory Control share information about companies, locations, and items. In the Surgical Instrument Management application you can load companies, locations, and items directly from Inventory Control. Inventory Control keeps track of all the information and transactions performed in Surgical Instrument Management.

Surgical Instrument Management Process Flow

The Surgical Instrument Management application is broken down into three processes: setup and configuration, processing, and reporting. This section takes a closer look at the Surgical Instrument Management application and at these processes.

Setup and Configuration

The setup part of the process includes adding users, associating them with groups, adding companies and locations, adding items, manufacturers, and configuring printers.

Processing

Users create tray lists; add and remove items from tray lists; manage list values; assemble trays, peel packs, and loaners; manage tray associations; transfer trays and carts to decontamination and sterilization locations; and track the progress and location of track trays, case carts, and surgical instruments.

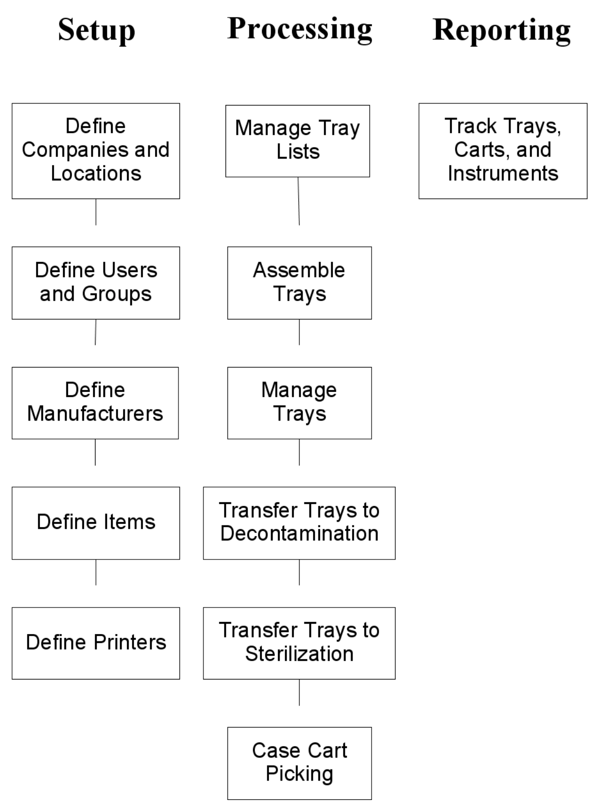
Reporting

With the reporting function you can view details about inventory management, processing activity, and productivity.

Surgical Instrument Management: A Big Picture

To represent Surgical Instrument Management's major processes, this user guide is divided into three main parts: Setup, Processing, and Reporting. This big picture flow illustrates Surgical Instrument Management's three main processes, breaks the processes down into sub-processes, and serves as a reminder of where you are in the big picture.

Figure 2. Procedure flow: Surgical Instrument Management



Chapter 2

Setting Up Surgical Instrument Management

This chapter explains setup considerations for Lawson Surgical Instrument Management.

Concepts in this Chapter

TIP To skip directly to the procedures, see "Procedures in This Chapter" on page 20

The following concepts provide background and conceptual information for procedures in this chapter.

What Is User Management?

User management refers to the administration of setting up users and grouping them into specific security roles.

Lawson Users

Lawson users are individuals a user account that exists only in MSCM or who have been set up with the appropriate identities and security in the Lawson system. The security for users in the Lawson system can be either Lawson Security or LAUA security.

Groups

Groups allow administrators to control user access to specific functions of the application, separating them into different categories based on the set of tasks they perform. For example, an administrator group is usually set up to manage items—adding new items, modifying existing items, loading items from Procurement, and inactivating items. In another example, a user group can be set up to access only functions for tray assembly, sterilization, and handheld functions.

What Is Location Management?

Location management refers to the administration and setting up of locations, companies, and sub-locations for use with the Lawson Surgical Instrument Management application.

Companies

Surgical Instrument Management companies correspond to companies in the Mobile Supply Chain Management system.

Administrators can add companies either directly to Surgical Instrument Management or bulk-load them from the Lawson Procurement database. When a user enters a new company in the Surgical Instrument Management application, its name is matched against the names in the Lawson

Procurement database. If there is a match, the data is imported; otherwise, a new company is created.

Locations

A location is a place in a company where inventory is stored. A location can represent a physical place, such as a city, building, or floor of a building. It can also represent a logical classification, such as spare parts, office supplies, and consignment inventory.

Administrators can add locations either directly to Surgical Instrument Management or bulk-load them from the Lawson Procurement database. When a user adds a new location in the Surgical Instrument Management application, its name is matched against the names in the Lawson Procurement database. If there is a match, the data is imported; otherwise, a new location is created.

The following locations are used in Surgical Instrument Management.

- **Instrument Source—** A location that serves the purpose of overall management of items and trays. In order for an SPD staff to use items and/or tray lists, the items and/or tray lists are associated to an instrument source location. Typically, the main SPD area is the instrument source.
- **Sterilization—**A location where sterilization processes occur. Sterilization equipment is associated to a location with the Sterilization Activity.
- **Case Cart Pick—** A location where case cart picking occurs. Locations with the Case Cart Picking Activity are available for case cart picking processes.
- **Decontamination—** A location where decontamination occurs. Locations with the Decontamination Activity are available for decontamination processes.
- **Storage—** A location where trays are stored. Locations with the Storage Activity are available for selection as a tray's default storage location and are also available for the transfer function.
- **Transfer—** A location where transfer processes occur. Locations with the Transfer Activity are available for transfer processes, such as transferring trays or case carts. Examples of transfer locations are case cart staging areas, holding areas in the OR, and repair locations.
- **Assembly—** A location where tray assembly occurs. Locations with the Assembly Activity are available for the tray assembly process.

Sub-Locations

Various business processes require that a location be broken down into more specific categories. The term sub-location was selected as a generic term for this functionality. A bin is a common type of sub-location in the Surgical Instrument Management application.

Report Groups

A report group is a structuring method you can use to classify a group of locations. You must have at least one report group per company in order to conduct a physical inventory assessment. In addition to conducting physical inventory, you can use report groups to classify locations for reporting, inquiry, and processing purposes. When you specify a report group in inquiry or report programs, you access only the information related to the locations within that report group.

What Is Item Management?

Item management refers to the administration and setting up of items for use with the Lawson Surgical Instrument Management application.

Item Master

The Surgical Instrument Management item master contains items that exist in the Lawson Procurement item master, and items that are created directly in the Surgical Instrument Management application.

Items can be added for use by the Surgical Instrument Management application either locally or by bulk loading them from Lawson Procurement. Items added in the Surgical Instrument Management application locally can be associated to Lawson Procurement if the user enters an item number that exists in the item master. By the same token, if an item is added to the Lawson Procurement item master that exists in the Surgical Instrument Manager system database, the user can associate the local item to the master item. This allows Surgical Instrument Management items that already exist in multiple tray lists and assemblies to be automatically updated to reflect the changes to the item.

Item Groups

An item group identifies a specific group of inventory items for a company. If multiple companies share the same inventory items, you need to set up the items only once, then assign the same item group to all companies. You can only assign one item group to each company; however, multiple companies can share an item group.

Items in Surgical Instrument Management are typically instruments. Item groups allow users to group items for use in trays. Typical groups are On Stringer, In Terry Towel, and Bottom of Pan.

What Is Manufacturer Management?

Manufacturer management refers to the administration of manufacturers for use with the Lawson Surgical Instrument Management application. Recording manufacturers of items helps when searching for items and connects the instruments to the Item Master in Mobile SCM.

How Do I Manage Printers?

There are two types of printers used in the Surgical Instrument Management application: Report printers and label printers. You can set up printers to be used by location and by workstation.

Procedures in This Chapter

This section provides guidance on using the web application to perform administrative procedures for setting up users, locations, items, manufacturers and printers for use with the Surgical Instrument Management application.

Logging into the Web Application

Use this procedure to gain access to the Surgical Instrument Management web application. Users able to access the Lawson Portal can pass seamlessly from the Lawson Portal to Mobile SCM.

STEPS To log into the web application

1. Open your web browser.
2. Select the Mobile SCM bookmark.

   The Lawson Mobile SCM login page appears.
3. Consider the following fields.

User ID	Enter the user ID assigned to you by the administrator.
Password	Enter your password.

4. Click Login.

   The Lawson Mobile SCM main page appears.
5. Select any of the options available in the left navigation pane to proceed.

STEPS To log out of the application

1. On the Mobile SCM main page, click logout.

   The Logged Out page appears.
2. To log back into the application, click Back to Login.

   To exit the application completely, close your web browser.

Navigating Search Results

Use this procedure to navigate through multiple pages of results when performing a search.

STEPS **To navigate search results**

1. Perform a search.

   A search results page appears.
2. Consider the following fields and controls.

Go to Page	Enter a page number in this field and click Go to display the selected page number.
First Page	Click this link to return to the first page of search results.
Previous	Click this link to display the previous page.
Next	Click this link to display the next page of search results.
Last	Click this link to display the last page of search results.

Adding Users

Users perform specific tasks, depending on the groups to which they are assigned. Groups are made up of users who perform similar tasks. When you add users, you assign values to them that determine the data they can access and the tasks they can perform.

Use this procedure to add new users to the Mobile SCM database.

Need More Details? Check out the following concepts:

- "What Is User Management?" on page 16

STEPS **To add a new user**

1. Select User Management in the Administration menu.
2. Select Users > Add New on the User Management page.

   The Add New User page appears.
3. Consider the following fields on the Add New User page to create a new user and assign the new user to a group.

User ID	Enter a user ID. **NOTE** The user ID field accepts alphanumeric characters only. The name you enter here is the same name the user enters on the Login page.

First Name	Enter the first name of the new user.
Last Name	Enter the last name of the new user.
Password	Enter a user password. **NOTE** The password must be at least five characters. This is the password the user enters on the Login page.
Confirm Password	Enter the password again to confirm.
Employee ID	Enter the employee identification number for the user.
E-mail	Enter a valid e-mail address for the user.
Group	Select the group to which the user is assigned.

4. Assign user access to locations. See "To assign user access to locations" on page 23 for steps on how to assign user access.
5. Set the default locations for the user. See "To assign locations defaults" on page 24 for steps on how to set location defaults.
6. Click Add User to add the new user information to the application.

   The Add New User confirmation page appears with the information for the user you added.
7. Click OK to return to the User Management page.

NOTE Surgical Instrument Management supports multiple companies, but typically users work in one or two locations. This allows administrators to limit what users have access to what data.

STEPS To assign user access to locations

1. On the Add New User or Modify User page, click Assign Access. The Location Access page appears.
2. Consider the following fields on the Assign Access to Locations page to assign user access to company locations.

Global Access	A user can have Global Access, which means that they have access to all companies and locations. Any user with global access can grant Global access to other users. If a user does not have global access, the Global Access check box does not display.
Company	Locations are assigned one company at a time. The Company drop-down list displays all companies for which the user has access to one or more locations.

System Locations	For each company, as an administrator you can grant a user two levels of access: • All Locations: All current locations for the company, as well as any locations that are added in the future. The All Location option is not displayed if the current user has access to all locations for the company. • Specific Locations: Only the individual locations that are selected. Only the locations that the current user has access to will be listed.
User's Locations	The locations to which the current user has access.

3. Click Add after selecting the system locations that you want to grant the user access to within a company.

   The locations are added to the User’s Locations list. If you want to remove locations that the current user should not have access to, select a location and click Remove.

4. Click Done when you are finished granting access to locations for the current user.

STEPS

To assign locations defaults

NOTE Setting default locations for each user saves time when the user is performing tasks in the Surgical Instrument Management application.

1. Select Default Locations.
   The Assign Locations Defaults page appears.

   For each application that is installed, the Default Location settings display.
2. In the Surgical Instrument Management section, select the company and location for each default location row.
3. Click OK to return to the Add New User page.

Adding Users from the Portal

Each user uses one user ID and password to log into the Surgical Instrument Management application, whether it is in standalone or integrated mode. Users can either be added from the Portal, or they can be added through the Add User function. See "To add a new user" on page 22 for information on adding users with the Add User function.

Need More Details? Check out the following concepts:

- "What Is User Management?" on page 16

STEPS

To add a user from the Portal

1. Select User Management in the Administration menu.
2. Select Users > Add User from Portal on the User Management page.

   The Search for a Portal User to Add to Mobile SCM page appears.

3. Consider the following fields.

Portal User ID	Enter the user ID for the portal user that you want to add.
First Name	Enter the first name for the portal user that you want to add.
Last Name	Enter the last name for the portal user that you want to add.
Employee ID	Enter the employee ID for the portal user that you want to add.

4. Click Search to display the Portal users that fit your search criteria. To search for all users, leave the fields blank.

   The Select a Portal User to Add to Mobile SCM page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

5. Click Add to Mobile SCM to add the portal user.

   The Add Portal User to Mobile SCM page appears.

6. Consider the following fields and controls.

Group	Select the group to which the user is assigned.
Assign Access	Click this button to assign user access to locations. See "To assign user access to locations" on page 23 for steps on how to assign user access.
Assign Defaults	Click this button to set the default locations for the user. See "To assign locations defaults" on page 24 for steps on how to set location defaults.

7. Click Add User to add the new user information to the application.

   The Add New User confirmation page appears with the information for the user you added.

8. Click OK to return to the User Management page.

Modifying Users

Use this procedure to modify user information name, password, employee ID, and group association.

Need More Details? Check out the following concepts:

- "What Is User Management?" on page 16

STEPS

To modify a user

1. Select User Management in the Administration menu.
2. Select Users > Modify on the User Management page.

   The Search for a User to Modify page appears.

3. Consider the following fields.

User ID	Enter the user ID to search for the user that you want to modify.
First Name	Enter the first name of the user that you want to modify.
Last Name	Enter the last name of the user that you want to modify.
User Group	Select the user group the user belongs to that you want to modify.
Company	Select the company of the user that you want to modify.
User Association	Select the Portal association of the user that you want to modify.

4. Click Search to display the users that fit your search criteria.

   The Select a User to Modify page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

5. Click Modify next to the user that you want to modify.

   The Modify User page appears.

6. Consider the following fields.

User ID	Displays the user ID for the user that you want to modify. **NOTE** The user ID field accepts alphanumeric characters only. The name you enter here is the same name the user enters on the Login page.
First Name	Edit the first name of the new user.
Last Name	Edit the last name of the new user.
Password	Edit a user password. **NOTE** The password must be at least five characters. This is the password the user enters on the Login page.
Confirm Password	Edit the password again to confirm.
Associated to Portal	Displays the status of the current user's association to the Portal.
Employee ID	Edit the employee identification number for the user.
E-mail	Edit a valid e-mail address for the user.
Active	Displays the activity status of the user.
Group	Modify the group to which the user is assigned.

7. Modify user location access and default locations for the user. For more information, see "To assign user access to locations" on page 23 and "To assign locations defaults" on page 24.
8. Click Modify User to save your changes.

   The Modify User page displays the newly modified user information.
9. Click OK to confirm the changes.

Viewing and Printing Users

Use this procedure to view or print information about single users.

Need More Details? Check out the following concepts:

- "What Is User Management?" on page 16

STEPS

To view or print a user

1. Select User Management in the Administration menu.
2. Select Users > View/Print on the User Management page.

   The Search for a User to View/Print page appears.
3. Consider the following fields.

User ID	Enter the user ID to search for the user you want to view or print.
First Name	Enter the first name of the user that you want to view or print.
Last Name	Enter the last name of the user that you want to view or print.
User Group	Select the user group the user belongs to that you want to view or print.
Status	Select the activity status of the user that you want to view or print.
Company	Select the company of the user that you want to view or print.
User Association	Select the Portal association of the user that you want to view or print.

4. Click Search to display the users that fit your search criteria.

   The Select a User to View/Print page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

5. Click View/Print next to the user that you want to view or print.

   The View/Print User page appears.
6. Click Print to print the user information.
7. Click Done to return to the User Management page.

Inactivating Users

Use this procedure to inactivate users who no longer use the application. This does not delete the user, so administrators can still maintain a record of a user's activities.

Need More Details? Check out the following concepts:

- "What Is User Management?" on page 16

STEPS **To inactivate users**

1. Select User Management in the Administration menu.
2. Select Users > Inactivate on the User Management page.

   The Search for a User to Inactivate page appears.
3. Consider the following fields.

User ID	Enter the user ID to search for the user you want to inactivate.
First Name	Enter the first name of the user that you want to inactivate.
Last Name	Enter the last name of the user that you want to inactivate.
User Group	Select the user group of the user that you want to inactivate.
Company	Select the company of the user that you want to inactivate.
User Association	Select the Portal association of the user that you want to inactivate.

4. Click Search to display the users that fit your search criteria. The Select a User to Inactivate page appears.
5. Click Inactivate next to the user that you want to inactivate.

   The Inactivate User page appears.
6. Click Inactivate to inactivate the selected user.
7. The Inactivate User confirmation page appears. Click OK to return to the User Management page.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

NOTE If you inactivate a user that is managed through the Portal, Lawson Mobile Supply Chain Management automatically inactivates the corresponding record.

Adding Groups

Use this procedure to add new groups to the Mobile SCM database.

Need More Details? Check out the following concepts:

- "What Is User Management?" on page 16

STEPS **To add new groups**

1. Select User Management in the Administration menu.
2. Select Groups > Add on the User Management page.

   The Add Group page appears.
3. Enter a name in the Create New Group Name field.
4. Click Continue.

   The Add Roles to Group window appears.
5. Select the appropriate roles from the All Roles list, and click Add.

   The selected roles appear in the Assigned Roles list.
6. Select Complete when finished you have finished assigning roles to the group.
7. Select Complete to return to the main menu.

Modifying Groups

Use this procedure to modify existing groups in Mobile SCM.

Need More Details? Check out the following concepts:

- "What Is User Management?" on page 16

STEPS **To modify groups**

1. Select User Management in the Administration menu.
2. Select Groups > Modify on the User Management page.

   The Modify Group page appears.
3. Select an existing group from the Modify Existing Group drop-down list and click Continue.

   The Modify Group Roles window appears.
4. Select the appropriate roles from the All Roles list, and select Add.
   To remove roles from the group, select the appropriate role from the Assigned Roles list and click Remove.
5. Click Complete when you have finished modifying the roles for the group.
6. Verify the information and click OK.

Viewing and Printing Groups

Use this procedure to view or print group information.

Need More Details? Check out the following concepts:

- "What Is User Management?" on page 16

STEPS

To view or print groups

1. Select User Management in the Administration menu.
2. Select Groups > View/Print on the User Management page.

   The View/Print Group page appears.
3. Select the group from the Select Group drop-down list, and click Continue.

   The View/Print Groups page appears.
4. Verify the information and select Print to print the selection.
5. Click OK when you are finished printing.

Adding Companies

Use this procedure to add companies to the Mobile SCM database.

STOP If your Surgical Instrument Management application is integrated with Mobile SCM, you should use the Add Company from Procurement function to add Surgical Instrument Management companies from Lawson Procurement. See "To add companies from Procurement" on page 32 for more information.

Need More Details? Check out the following concepts:

- "What Is Location Management?" on page 16

STEPS **To add new companies**

1. Select Location Management in the Administration menu.
2. Select Companies > Add New on the Location Management page.
3. Consider the following fields on the Add New Company page to create a new company.

Company ID	Enter the identification for the new company.
Company Description	Enter a brief description of the new company.
Item Group	Select the item group with which you want to associate the new company.

4. Click Add.

   The Add New Company confirmation page appears with the new company information.

   NOTE If a company ID already exists in the Procurement system, the system prompts you to do one of the following:

   - Use the company information that already exists in Procurement.
   - Return to the Add New Company page and enter a unique company ID.

   ---

5. To add another company, click Add Another and follow the preceding steps. When you are finished adding new companies, click Done.

Adding Companies from Procurement

Use this procedure to add companies to Mobile SCM from the Lawson Procurement database.

Need More Details? Check out the following concepts:

- "What Is Location Management?" on page 16

STEPS

To add companies from Procurement

1. Select Location Management in the Administration menu.
2. Select Companies > Add Company from Procurement on the Location Management page.

   The Search for a Procurement Company to Add to Mobile SCM page appears.
3. Consider the following fields.

Company	Select the company that you want to add from Procurement.
Company Description	Enter the description of the company that you want to add from Procurement.

4. Click Search to display the companies that match your search criteria.

   The Select a Procurement Company to Add to Mobile SCM page appears.
5. Click Add to Mobile SCM next to the company that you want to add to the application server.

   The Add Procurement Company to Mobile SCM page appears.
6. Click OK to add the Procurement company to the Mobile SCM database.
7. To add another company, click Add Another and follow the preceding steps. When you are finished adding Procurement companies, click Done.

NOTE If you selected the wrong Procurement company to add to Mobile SCM, click Back to Add to return to the Select a Procurement Company to Add to Mobile SCM page.

Modifying Companies

Use this procedure to modify companies not associated with Lawson Procurement.

NOTE Companies associated to Procurement cannot be modified with Mobile SCM.

Need More Details? Check out the following concepts:

- "What Is Location Management?" on page 16

STEPS

To modify companies

1. Select Location Management in the Administration menu.
2. Select Companies > Modify on the Location Management page.

   The Search for a Company to Modify page appears.
3. Consider the following fields.

Company	Select the company that you want to modify.
Company Description	Enter the description of the company that you want to modify.
Company Association	Select the association to Procurement of the company that you want to modify.

4. Click Search to display the companies that fit your search criteria.

   The Select Company to Modify page appears.
5. On the Select Company to Modify page, click Modify next to the company that you want to modify.

   The Modify Company page appears.
6. Edit the Company Description as you need.
7. Click Modify to save your changes.
8. The Modify Company page displays the newly modified company information. Click OK to confirm the changes.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

Viewing and Printing Companies

Use this procedure to view or print company information for single companies.

Need More Details? Check out the following concepts:

- "What Is Location Management?" on page 16

STEPS **To view or print companies**

1. Select Location Management in the Administration menu.
2. Select Companies > View/Print on the Location Management page.

   The Search for a Company to View/Print page appears.
3. Consider the following fields.

Company	Select the company that you want to view or print.
Company Description	Enter the description of the company that you want to view or print.
Status	Select the activity status of the company that you want to view or print.
Company Association	Select the association to Procurement of the company that you want to view or print.

4. Click Search to display the companies that fit your search criteria. The Select Company to View/Print page appears.
5. Click View/Print next to the company that you want to view or print.

   The View/Print Company page appears.
6. Click Print to print the company information.
7. Click Done to return to the Location Management page.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

Inactivating Companies

Use this procedure to inactivate companies that are no longer in use. This does not delete the company ,so administrators can still maintain a record of a company's activities.

Need More Details? Check out the following concepts:

- "What Is Location Management?" on page 16

STEPS

To inactivate companies

1. Select Location Management in the Administration menu.
2. Select Companies > Inactivate on the Location Management page.

   The Search for a Company to Inactivate page appears.
3. Consider the following fields.

Company	Select the company that you want to inactivate.
Company Description	Enter the description of the company that you want to inactivate.
Status	Select the activity status of the company that you want to inactivate.
Company Association	Select the association to Procurement of the company that you want to inactivate.

NOTE For information about navigating search results, see "To navigate search results" on page 22

4. Click Search to display the companies that fit your search criteria. The Select Company to Inactivate page appears.
5. Click Inactivate next to the company that you want to inactivate.

   The Inactivate Company page appears.
6. Click Inactivate to inactivate the selected company.
7. The Inactivate Company confirmation page appears. Click OK to return to the Location Management page.

Adding Locations

Use this procedure to add locations to the Mobile SCM database.

Need More Details? Check out the following concepts:

- "What Is Location Management?" on page 16

STEPS

To add new locations

1. Select Location Management in the Administration menu.
2. Select Locations > Add New on the Location Management page.

   The Add New Location page appears.

3. Consider the following fields.

Company	Select the company where you want to add the location.
Location ID	Enter the ID for the new location.
Location Description	Enter a brief description of the new location.
Report Groups	Select the report group that you want to associate with the locations. See "Report Groups" on page 17 for information about report groups.
Assembly	Select this check box if the location is one where trays are assembled.
Case Cart Pick	Select this check box if the location is one where case cart picking occurs.
Decontamination	Select this check box if the location is one where decontamination processes occur.
Instrument Source	Select this check box if the location is one involved with managing items and trays.
Sterilization	Select this check box if the location is one where sterilization processes occur.
Storage	Select this check box if the location is one where trays are stored.
Transfer	Select this check box if the location is one where transfer processes occur.

4. Click Add.

   The Add New Location page appears.

5. Consider the following options.

Add Another	Click this button to return to the Add New Location entry page to enter another location.
Print Label	Click this button to print a bar code label for the location.
Done	Click this button when you have finished adding new locations.

Adding Locations from Procurement

Use this procedure to add locations from the Lawson Procurement database.

Need More Details? Check out the following concepts:

- "What Is Location Management?" on page 16

STOP Before you begin, be sure that companies are defined in the Lawson Procurement (PO) application. In PO, companies are called PO companies. They are defined on PO Company Setup (PO01.1). For more information, see the *Purchase Order User Guide*.

STEPS To add locations from Procurement

1. Select Location Management in the Administration menu.
2. Select Locations > Add Location from Procurement on the Location Management page.

   The Search for a Procurement Location to Add to Mobile SCM page appears.
3. Consider the following fields.

Company	Select the company in Procurement of the location you want to add.
Location ID	Enter the location ID of the location you want to add.
Location Description	Enter the location description of the location you want to add.

4. Click Search to display the locations that fit your search criteria.
   The Select Procurement Location to Add to Mobile SCM page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22

5. Click Add to Mobile SCM next to the location that you want to add to the application server.

   The Add Procurement Location to Mobile SCM page appears.
6. Consider the following fields on the Add Procurement Location to Mobile SCM page.

Report Groups	Select the report group that you want to associate with the locations. See "Report Groups" on page 17 for information about report groups.
Assembly	Select this check box if the location is one where trays are assembled.
Case Cart Pick	Select this check box if the location is one where case cart picking occurs.
Decontamination	Select this check box if the location is one where decontamination processes occur.
Instrument Source	Select this check box if the location is one involved with managing items and trays.
Sterilization	Select this check box if the location is one where sterilization processes occur.
Storage	Select this check box if the location is one where trays are stored.

Transfer	Select this check box if the location is one where transfer processes occur.

7. Click Add.

   The Add New Location page appears.

8. Consider the following options.

Back to Search Results	Click this button to return to the Select Procurement Location to Add to Mobile SCM page to enter another location.
Print Label	Click this button to print a bar code label for the location.
Search Again	Click this button to search again with new search criteria.
Done	Click this button when you have finished adding locations from Procurement.

Modifying Locations

Use this procedure to modify locations not associated with Lawson Procurement.

Need More Details? Check out the following concepts:

- "What Is Location Management?" on page 16

STEPS **To modify locations**

1. Select Location Management in the Administration menu.
2. Select Locations > Modify on the Location Management page.

   The Search for a Location to Modify page appears.

3. Consider the following fields.

Company	Select the company of the location that you want to modify.
Location ID	Enter the location ID of the location that you want to modify.
Location Description	Enter the description of the location that you want to modify.
Location Activities	Select the activities associated with the location that you want to modify. **TIP** To select more than one activity, hold down the **Ctrl** key while selecting activities.

Location Association	Select the association to Procurement of the location that you want to modify.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

4. Click Search to display the locations that fit your search criteria.

   The Select Location to Modify page appears.

5. Click Modify next to the location that you want to modify.

   The Modify Location page appears.

6. Consider the following fields.

Report Groups	Select the report group that you want to associate with the locations. See "Report Groups" on page 17 for information about report groups.
Assembly	Select this check box if the location is one where trays are assembled.
Case Cart Pick	Select this check box if the location is one where case cart picking occurs.
Decontamination	Select this check box if the location is one where decontamination processes occur.
Instrument Source	Select this check box if the location is one involved with managing items and trays.
Sterilization	Select this check box if the location is one where sterilization processes occur.
Storage	Select this check box if the location is one where trays are stored.
Transfer	Select this check box if the location is one where transfer processes occur.

7. Click Modify to save your changes.

   The Modify Location page appears.

8. Consider the following options.

Print Label	Click this button to print a bar code label for this location.
Done	Click this button to return to the Location Management page.

Viewing and Printing Locations

Use this procedure to view or print location information for single locations.

Need More Details? Check out the following concepts:

- "What Is Location Management?" on page 16

STEPS

To view or print locations

1. Select Location Management in the Administration menu.
2. Select Locations > View/Print on the Location Management page.

   The Search for a Location to View/Print
3. Consider the following fields.

Company	Select the company of the location that you want to view or print.
Location ID	Enter the location ID of the location that you want to view or print.
Location Description	Enter the description of the location that you want to view or print.
Location Activities	Select the activities associated with the location that you want to view or print. **TIP** To select more than one activity, hold down the **Ctrl** key while selecting activities.
Status	Select the activity status of the location that you want to view or print.
Location Association	Select the association to Procurement of the location that you want to view or print.

4. Click Search to display the locations that fit your search criteria.

   The Select Location to View/Print page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

5. Click View/Print next to the company that you want to view or print.

   The View/Print Location page appears.
6. Consider the following options.

Print	Click this button to print the location information.
Print Label	Click this button to print a bar code label for this location.
Done	Click this button to return to the Location Management page.

Inactivating Locations

Use this procedure to inactivate locations that are no longer in use. This does not delete the location, so administrators can still maintain a record of a location's activities.

Need More Details? Check out the following concepts:

- "What Is Location Management?" on page 16

STEPS

To inactivate locations

1. Select Location Management in the Administration menu.
2. Select Locations > Inactivate on the Location Management page.

   The Search for a Location to Inactivate page appears.
3. Consider the following fields.

Company	Select the company of the location that you want to inactivate.
Location ID	Enter the location ID of the location that you want to inactivate.
Location Description	Enter the description of the location that you want to inactivate.
Location Activities	Select the activities associated with the location that you want to inactivate. **TIP** To select more than one activity, hold down the **Ctrl** key while selecting activities.
Procurement Status	Select the procurement status of the company that you want to inactivate.
Location Association	Select the association to Procurement of the location that you want to inactivate.

4. Click Search to display the locations that fit your search criteria.

   The Select Location to Inactivate page appears.
5. Click Inactivate next to the company that you want to inactivate.

   The Inactivate Location page appears.
6. Click Inactivate to inactivate the selected location.

   The Inactivate Location confirmation page appears.
7. Click OK to return to the Location Management page.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

Printing Location Labels

Use this procedure to print bar code labels for locations. These labels help users to easily scan a location before scanning the trays during transfer tasks.

Need More Details? Check out the following concepts:

- "What Is Location Management?" on page 16

STEPS

To print location labels

1. Select Location Management in the Administration menu.
2. Select Locations > Print Labels on the Location Management page.

   The Search for a Location to Print Labels page appears.
3. Consider the following fields.

Company	Select the company of the location for which you want to print labels.
Location ID	Enter the location ID of the location for which you want to print labels.
Location Description	Enter the description of the location for which you want to print labels.
Location Activities	Select the activities associated with the location for which you want to print labels. **TIP** To select more than one activity, hold down the **Ctrl** key while selecting activities.
Location Association	Select the association to Procurement of the location for which you want to print labels.

4. Click Search to display all locations that fit your search criteria.

   The Select Locations to Print Labels For page appears.
5. Select the check boxes of the locations for which you want to print labels.
6. Click Print.
7. On the Print Labels confirmation page click Done to return to the Location Management page.

Adding Sub-Locations

Use this procedure to add sub-locations. Sub-locations are used in the handheld transfer function.

Need More Details? Check out the following concepts:

- "What Is Location Management?" on page 16

STEPS **To add sub-locations**

1. Select Location Management in the Administration menu.
2. Select Sub Locations on the Location Management page.

   The Search for Sub-Locations to Manage/Print Labels page appears.
3. Consider the following fields.

Company	Select the company for the sub-location.
Location	Select the location for the sub-location.
From Sub Location	Enter sub-location from the beginning of the list to search for a range of sub-locations.
To Sub Location	Enter a sub-location from the end of the list to search for a range of sub-locations.

4. Click Next to display the sub-locations that fit your search criteria.

   The Sub Locations page appears.
5. Click Add Sub Locations.

   The Add Sub Locations page appears.
6. Enter a sub-location ID in the Sub Location field.
7. When you are finished adding sub-locations, click Save and Done.

   The Sub Locations page appears.
8. Click Done.

TIP If you are adding more than ten sub-locations, click Save and Continue. An additional ten sub-location fields appear.

Printing Sub-Location Labels

Use this procedure to print bar code labels for sub-locations.

Need More Details? Check out the following concepts:

- "What Is Location Management?" on page 16

STEPS **To print sub-location labels**

1. Search for sub-locations within a company and location as described in Steps 1-4 in "To add sub-locations" on page 43.

   The Sub Locations page appears.
2. Select the check boxes for the sub-locations for which you want to print bar code labels.
3. Click Print Labels.
4. When you have finished print sub-location labels, click Done.

Inactivating Sub-Locations

Use this procedure to inactivate sub-locations that are no longer in use. This does not delete the sub-location, so administrators can still maintain a record of a sub-location's activities.

Need More Details? Check out the following concepts:

- "What Is Location Management?" on page 16

STEPS **To inactivate sub locations**

1. Search for sub-locations within a company and location as described in Steps 1-4 in "To add sub-locations" on page 43.

   The Sub Locations page appears.
2. Select the check boxes for the sub-locations that you want to inactivate.
3. Click Inactivate.
4. When the system prompts you to confirm that you want to inactivate the selected sub-locations, click OK.
5. When you have finished inactivating sub-locations, click Done.

TIP Click the red Inactivate icon in the row of a single sub-location that you want to inactivate.

Adding Items

Use this procedure to add items to the Surgical Instrument Management application.

This function searches the Surgical Instrument Management catalog first to determine if the item already exists. If your Surgical Instrument Management application is integrated with Mobile SCM, the system will include master items.

Need More Details? Check out the following concepts:

- "What Is Item Management?" on page 18

STEPS

To add items

1. Select Item Management in the Administration menu.
2. Select Items > Add on the Item Management page.

   The Add Item : Step 1 page appears.

TIP We recommend you perform your search using Manufacturer Name and Manufacturer number. Searching with Item Description may limit the search too much.

3. Consider the following fields.

Item Group	Select the item group to search for a group of items associated with your company.
Manufacturer Name	Select either SIM Manufacturers or Procurement Manufacturers to choose a manufacturer category. Select the name of the manufacturer to search for items from a particular manufacturer in the selected group.
Manufacturer Number	Enter the catalog number to search for items from a particular manufacturer.
Item Description	Enter an item description to search for a specific item.

4. Click Next to display the items that fit your search criteria.

   The Add Item : Step 2 page appears.

5. If you cannot find the item you're searching for, try one of the following.
   - Click Search Again to broaden search criteria and search again.
   - Click Add As New to add a new Item. See "To add an item as new" on page 47 for information on how to add an item as new.
6. If you found the item you were searching for, click Select in the item row that you want to add.
   The Add Item : Step 3 page appears.

NOTE Depending on whether items were previously added in Procurement or in Surgical Instrument Management, some fields may be display only.

7. To edit previously existing Surgical Instrument Management catalog information, click Edit in the Surgical Instrument Management catalog section to edit the item information.
8. To use the item in a specific Location, click Add Item to Location in the Item in Locations section. To track item in a specific location (but not all locations), click Add Item to Location.

   The item in Location popup window appears, displaying the General tab.

9. Consider the following fields.

Company	Select the name of the company for the item.
Instrument Source	Select the name of the source for the item.
Sub-Location	Enter the name of the sub-location for the item or search for it through the Find button.

Local Item Description	Enter the description of the item as it appears in instrument source location.
Image Location	Enter the path for the image that you want to associate with the item. You can also click Browse to search for the image on your computer.
Cost	Enter the cost of the item.
Instrument Tracking is enabled during Assembly	Click to track instruments during assembly. This will already be checked if you activated Instrument Tracking is Enabled in each Location check box on the Add Item: Step 3 page.

NOTE To track the item in all locations, check Instrument Tracking is enabled in each Location.

10. To add instruments or make changes to instruments in a location, select the Instruments tab in the Item in Location popup window.

    The Instruments tab of the Item in Location popup window appears.
11. Consider the following fields.

Add New ID	Click to add a new instrument to the list.
Inactivate All	Click to make all listed instruments not available for use.
Show active instruments only	Check to display only active instruments in the list.
Active	Check to make an instrument available for use.

12. Click Edit on an instrument ID to make changes to the information for that instrument ID.
13. Click OK to save your changes.
14. To display a list of all active instruments in the Surgical Instrument Management catalog, click View All Instruments.

    The Active Instruments popup window appears.
15. Once you have viewed the instruments in the list on the Active Instruments popup window, click Close.
16. Consider the following fields.

Show Locations in use only	Click to display only locations that the item is used at.
Co. ID	The ID of the company for the item. This field is read-only.
Location	The name of the location for the item. This field is read-only.
Sub-Loc	The name of the sub-location for the item.

Local Item Description	The description of the item as it appears in instrument source location. This field is read-only.
Img.	Displays whether local image exists at this location.
Cost	Enter the cost of the item.
Qty.	Displays number of active instruments that are tracked at this location.
Track	Displays whether instruments are tracked at this location.
Use	Click to use the item at this location.

17. On the Add Item : Step 3 page click Done.

    The Confirmation: Added Item page appears.

18. Click OK.

STEPS To add an item as new

1. Follow Steps 1-4 in "To add items" on page 45 to start adding an item.

   The Add Item : Step 2 page appears.

2. Click Add As New.

   The Add Item : Step 3 page appears.

3. Consider the following fields.

Mfg. Name	Select the name of the manufacturer for the item.
Mfg. Nbr.	Enter the number of the manufacturer for the item.
Item Description	Enter the description of the item as you want it to appear in the Surgical Instrument Management application.
Image	Enter the path for the image that you want to associate with the item. You can also click Browse to search for the image on your computer. Click View Image to preview the image.

4. To use the item in a specific Location, click Add Item to Location in the Item in Locations section. To track item in a specific location (but not all locations), click Add Item to Location.

   The Item in Location popup window appears, displaying the General tab.

NOTE To track the item in all locations, check Instrument Tracking is enabled in each Location.

5. Consider the following fields.

Company	Select the name of the company for the item.
Instrument Source	Select the name of the source for the item.
Sub-Location	Enter the name of the sub-location for the item or search for it through the Find button.
Local Item Description	Enter the description of the item as it appears in instrument source location.
Image Location	Enter the path for the image that you want to associate with the item. You can also click Browse to search for the image on your computer.
Cost	Enter the cost of the item.
Instrument Tracking is enabled during Assembly	Click to track instruments during assembly. This will already be checked if you activated Instrument Tracking is Enabled in each Location check box on the Add Item: Step 3 page.

6. To add instruments in a location, select the Instruments tab in the Item in Location popup window.

   The Instruments tab of the Item in Location popup window appears.

7. Consider the following fields.

Add New ID	Click to add a new instrument to the list.
Inactivate All	Click to make all listed instruments not available for use.
Show active instruments only	Check to display only active instruments in the list.
Active	Check to make an instrument available for use.

8. Click Edit on an instrument ID to make changes to the information for that instrument ID.
9. Click OK to save your changes.
10. On the Add Item : Step 3 page, click Done to add the item.

Modifying Items

Use this procedure to modify items in the Surgical Instrument Management application.

Need More Details? Check out the following concepts:

- "What Is Item Management?" on page 18

STEPS

To modify items

1. Select Item Management in the Administration menu.
2. Select Items > Modify on the Item Management page.

The Search for Item to Modify page appears.

3. Consider the following fields.

Item Group	Select the item group for the item that you want to modify.
Manufacturer Name	Select either SIM Manufacturers or Procurement Manufacturers to choose a manufacturer category. Select the name of the manufacturer from the selected group for the item that you want to modify.
Manufacturer Nbr.	Enter the manufacturer number of the item that you want to modify.
Assoc. to Procurement	Select the association to Procurement for the item that you want to modify.
SIM Item Nbr.	Enter the SIM item number for the item that you want to modify.
Procurement Item Nbr	Enter the Procurement item number for the item that you want to modify.
Item Description	Enter the description of the item that you want to modify.
Company	Select the company of the item that you want to modify.
Instr Source Location	Select instrument source in the company for the item that you want to modify.
Instrument Nbr.	Enter the instrument number of the item that you want to modify.

4. Click Search to display the items that fit your search criteria.

   The Select Item to Modify page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

5. Click Modify in the row of the item that you want to modify.

   The Modify Item page appears.

6. To edit existing Surgical Instrument Management catalog information for the item, click Edit in the Surgical Instrument Management catalog section at the bottom of the page.
   The Item in Location popup window appears, displaying the General tab.

NOTE Depending on whether items were previously added in Procurement or in Surgical Instrument Management, some fields may be display only.

7. To change details of the item in a specific Location, click Add Item to Location in the Item in Locations section.

   The Item in Location popup window appears, displaying the General tab.

8. Consider the following fields.

Company	Select the name of the company for the item.
Instrument Source	Select the name of the source for the item.

Sub-Location	Enter the name of the sub-location for the item or search for it through the Find button.
Local Item Description	Enter the description of the item as it appears in instrument source location.
Image Location	Enter the path for the image that you want to associate with the item. You can also click Browse to search for the image on your computer.
Cost	Enter the cost of the item.
Instrument Tracking is enabled during Assembly	Click to track instruments during assembly. This will already be checked if you activated Instrument Tracking is Enabled in each Location check box on the Add Item: Step 3 page.

NOTE To track the item in all locations, check Instrument Tracking is enabled in each Location.

9. Click OK to save your changes in the Item in Location popup window.
10. If you want to associate the SIM item with the Procurement item, click Associate to Procurement Item.

    The Associate Item to Procurement Item popup window appears

NOTE If you want to disassociate the SIM item from the Procurement item, click Disassociate from Procurement Item. The system prompts you to confirm the disassociation.

TIP To widen your search, leave the fields blank. This displays all the items available in the Procurement system.

11. Consider the following fields.

Procurement Item No.	Enter the item number for the Procurement item if available.
Description	Edit or enter the description of the Procurement item.
Mfg. Name	Select the manufacturer of the Procurement item.
Mfg. Nbr.	Enter the manufacturer's number of the Procurement item.
Major Class	Select the major purchasing class of the Procurement item.
Minor Class	Select the minor purchasing class of the Procurement item.
Usage Identifier	Select the item master usage identifier of the Procurement item.

12. Enter a valid procurement item number and click Associate next to the Procurement Item No. field to associate the selected item with an item in the Procurement system.

    – or –

Click Search to display the Procurement item information that fits your search criteria, and click Select next to the desired Procurement Item.

13. Click Done on the Modify Item page to complete the modifications.

    The Confirmation: Modified Item page appears.

14. Click OK.

Bulk Loading Items from Procurement

Use this procedure to load items from Procurement to the Surgical Instrument Management application.

Need More Details? Check out the following concepts:

- "What Is Item Management?" on page 18

STEPS **To bulk load items from Procurement**

1. Select Item Management in the Administration menu.
2. Select Items > Bulk Load from Procurement on the Item Management page.

   The Search for Items in Procurement to Add to SIM page appears.

3. Consider the following fields.

TIP To search for all items, leave the fields blank.

Item Group	Select the item group of the Procurement item.
Procurement Item No.	Enter the item number for the Procurement item.
Description	Enter the description of the Procurement item.
Mfg. Name	Select the manufacturer of the Procurement item.
Mfg. Nbr.	Enter the manufacturer's number of the Procurement item.
Major Class	Select the major purchasing class of the Procurement item.
Minor Class	Select the minor purchasing class of the Procurement item.
Usage Identifier	Select the item master usage identifier of the Procurement item.

4. Click Search to display the items that fit your search criteria.

   The Select Procurement Item(s) to Use in SIM page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

5. Select the check boxes of the items that you want to add to Surgical Instrument Management.

TIP Select the All Items Found: Check All check box to add all the items in the search results or the All Items on Page: Check All check box to add all the items listed on the page.

NOTE If you want to add a single Procurement item to the Surgical Instrument Management, skip to Step 10.

6. Click Add Selected.

   The Validation: Adding Items page appears.
7. Click Add.

   The Select Procurement Item(s) to Add to Mobile SCM page appears.
8. Click Add.

   The Confirmation: Added Items from Procurement page appears.
9. Click OK to return to the Item Management page.
10. If you are adding a single item, click Add Item on the row of the item that you want to add to add a single item for use in Surgical Instrument Management.

    The Add Single Item from Procurement page appears.
11. Consider the following fields.

Mfg. Name	The name of the manufacturer for the item.
Mfg. Nbr.	The number of the manufacturer for the item.
Item Description	Enter the description of the item as you want it to appear in the Surgical Instrument Management application.
Image	Enter the path for the image that you want to associate with the item. You can also click Browse to search for the image on your computer. Click View Image to preview the image.

12. To use the item in a specific Location, click Add Item to Location in the Item in Locations section. To track item in a specific location (but not all locations), click Add Item to Location.

    The Item in Location popup window appears, displaying the General tab.

NOTE To track the item in all locations, check Instrument Tracking is enabled in each Location.

13. Consider the following fields.

Company	Select the name of the company for the item.
Instrument Source	Select the name of the source for the item.
Sub-Location	Enter the name of the sub-location for the item or search for it through the Find button.
Local Item Description	Enter the description of the item as it appears in instrument source location.

Image Location	Enter the path for the image that you want to associate with the item. You can also click Browse to search for the image on your computer.
Cost	Enter the cost of the item.
Instrument Tracking is enabled during Assembly	Click to track instruments during assembly. This will already be checked if you activated Instrument Tracking is enabled in each Location check box on the Add Item: Step 3 page.

14. To add instruments in a location, select the Instruments tab in the Item in Location popup window.

    The Instruments tab of the Item in Location popup window appears.

15. Consider the following fields.

Add New ID	Click to add a new instrument to the list.
Inactivate All	Click to make all listed instruments not available for use.
Show active instruments only	Check to display only active instruments in the list.
Active	Check to make an instrument available for use.

16. Click Add.

    The Confirmation: Add Single Item from Procurement page appears.

17. Click OK to save your changes.

Viewing and Printing Items

Use this procedure to view or print information for existing items.

Need More Details? Check out the following concepts:

- "What Is Item Management?" on page 18

STEPS **To view or print items**

1. Select Item Management in the Administration menu.
2. Select Items > View/Print on the Item Management page.

   The Search for Item to View/Print page appears.

3. Consider the following fields.

Item Group	Select the item group for the item that you want to view or print.

Manufacturer Name	Select either SIM Manufacturers or Procurement Manufacturers to choose a manufacturer category. Select the name of the manufacturer from the selected group for the item that you want to view or print.
Manufacturer Nbr.	Enter the manufacturer number of the item that you want to view or print.
Assoc. to Procurement	Select the association to Procurement for the item that you want to view or print.
SIM Item Nbr.	Enter the SIM item number for the item that you want to view or print.
Procurement Item Nbr	Enter the Procurement item number for the item that you want to view or print.
Item Description	Enter the description of the item that you want to view or print.
Company	Select the company of the item that you want to view or print.
Instr Source Location	Select instrument source in the company for the item that you want to view or print.
Item Status	Select the activity status of the item that you want to view or print.
Instrument Nbr.	Enter the instrument number of the item that you want to modify.

4. Click Search to display the items that fit your search criteria.

   The Select Item to View/Print page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

5. Click View/Print on the row of the item that you want view or print.

   The View/Print Item page appears.

6. Click Print to print the item information.

Inactivating Items

Use this procedure to inactivate items that are no longer in use. This does not delete the item so administrators can maintain a record of an item's activities.

Need More Details? Check out the following concepts:

- "What Is Item Management?" on page 18

STOP Before you can inactivate an item, you remove it from all instrument source locations. See step 8 in "To modify items" on page 48 for more information.

STEPS To inactivate items

1. Select Item Management in the Administration menu.
2. Select Items > Inactivate on the Item Management page.

   The Search for Item to Inactivate page appears.
3. Consider the following fields.

Item Group	Select the item group for the item that you want to inactivate.
Manufacturer Name	Select either SIM Manufacturers or Procurement Manufacturers to choose a manufacturer category. Select the name of the manufacturer from the selected group for the item that you want to inactivate.
Manufacturer Nbr.	Enter the manufacturer number of the item that you want to inactivate.
Assoc. to Procurement	Select the association to Procurement for the item that you want to inactivate.
SIM Item Nbr.	Enter the SIM item number for the item that you want to inactivate.
Procurement Item Nbr	Enter the Procurement item number for the item that you want to inactivate.
Item Description	Enter the description of the item that you want to inactivate.
Company	Select the company of the item that you want to inactivate.
Instr Source Location	Select instrument source in the company for the item that you want to inactivate.
Instrument Nbr.	Enter the instrument number of the item that you want to inactivate.

4. Click Search to display the items that fit your search criteria.

   The Select Item to Inactivate page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

5. Click Inactivate in the row of the item that you want to inactivate.

   The Inactivate Item page appears.

6. Click Inactivate to inactivate the selected item.

   NOTE If you cannot click on Inactivate, you did not remove this item from all instrument source locations.

7. When the Inactivate Item confirmation page appears, click OK to return to the Item Management page.

Adding Manufacturers

Use this procedure to add new manufacturers to the Surgical Instrument Management application.

Need More Details? Check out the following concepts:

- "What Is Manufacturer Management?" on page 18

STEPS

To add manufacturers

1. Select Manufacturer Management in the Administration menu.
2. Select Manufacturers > Add from the Manufacturers menu on the Manufacturer Management page.

   The Add New Manufacturer page appears.

3. Consider the following fields.

Item Group	Select the item group the manufacturer is associated with.
Manufacturer Code	Enter the code for the manufacturer.
Manufacturer Division	Enter the division the manufacturer belongs to.
Manufacturer Name	Enter the name of the manufacturer.

4. Click Add.

   The Add Manufacturer confirmation page appears.

5. Click OK to return to the Manufacturer Management page.

Modifying Manufacturers

Use this procedure to modify existing manufacturers.

Need More Details? Check out the following concepts:

- "What Is Manufacturer Management?" on page 18

STEPS

To modify manufacturers

1. Select Manufacturer Management in the Administration menu.
2. Select Manufacturers > Modify from the Manufacturers menu on the Manufacturer Management page.

   The Select Manufacturer to Modify page appears.

   NOTE You can only modify manufacturers added in the Surgical Instrument Management system with this procedure. To modify manufacturers that were added in the Procurement system, contact the Procurement department.

3. Consider the following fields.

Item Group	Select the item group the manufacturer is associated with.
Manufacturer Name	Select the name of the manufacturer that you want to modify.

4. Click Search to display the manufacturers that fit your search criteria.

   The Modify Manufacturer page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

5. Edit the manufacturer name as needed in the Manufacturer Name field.
6. Click Modify to save your changes.

   The Modify Manufacturer confirmation page appears.

7. Click OK to accept the changes and return to the Manufacturer Management page.

Viewing and Printing Manufacturers

Use this procedure to view or print manufacturer information.

Need More Details? Check out the following concepts:

- "What Is Manufacturer Management?" on page 18

STEPS

To view or print manufacturers

1. Select Manufacturer Management in the Administration menu.
2. Select Manufacturers > View/Print from the Manufacturers menu on the Manufacturer Management page.

   The Select Manufacturer to View/Print page appears.
3. Consider the following fields.

Item Group	Select the item group for the manufacturer that you want to view or print.
Manufacturer Name	Select the name of the manufacturer that you want to view or print .
Manufacturer Filter	Select one of the following to display only the manufacturers in a specific system. • **All –** Select this filter option to display all manufacturers. • **Mobile SCM Manufacturer –** Select this filter option to display only manufacturers that exist in the Surgical Instrument Management system. • **Procurement Manufacturer –**Select this filter option to display only manufacturers that exist in the Procurement system.

4. Click View/Print.

   The View/Print Manufacturer page appears.
5. Click Print to print the manufacturer information.
6. Click Cancel to return to the Manufacturer Management page.

Inactivating Manufacturers

Use this procedure to inactivate manufacturers that are no longer in use. This does not delete the manufacturer, so administrators can still maintain a record of a manufacturer's activities.

Need More Details? Check out the following concepts:

- "What Is Manufacturer Management?" on page 18

STEPS To inactivate manufacturers

1. Select Manufacturer Management in the Administration menu.

NOTE You can only inactivate manufacturers you added in Surgical Instrument Management. To inactivate manufacturers that were added in the Procurement System, contact the Procurement department.

2. Select Manufacturers > Inactivate from the Manufacturers menu on the Manufacturer Management page.

   The Select Manufacturer to Inactivate page appears.
3. Consider the following fields.

Item Group	Select the item group for the manufacturer that you want to inactivate.
Manufacturer Name	Select the name of the manufacturer that you want to inactivate.

4. Click Select.

   The Modify Manufacturer page appears.
5. Click Inactivate.

   The Modify Manufacturer page appears.
6. Click OK.

Adding Printers

Use this procedure to add a printer to your system.

Need More Details? Check out the following concepts:

- "How Do I Manage Printers?" on page 19

STEPS To add a printer

1. Select Printer Management in the Administration menu.
2. Select Printers > Add on the Printer Management page.

   The Add Printer page appears.

3. Consider the following fields on the Add Printer page.

Printer Name	Enter the name of the printer you are adding.
Hostname	Enter the network address or IP address for the printer.
Type	Select the type of printer that you want to add. • Report – A printer that prints documents on the standard 8.5 x 11 inch paper stock. • Label – A specialized printer for labels that uses a language to describe the layout of information on a label. **NOTE** See below for information for setting up label printers (Step 4).
Company	Select the company you make the printer accessible from.
Company Default	Select this check box to make the printer you are adding the default printer for the selected company.

4. Consider the following Label Printer Details fields if you are adding a label printer.

Make	Enter the brand name of the label printer.
Model	Enter the model number of the label printer.
Port	Enter the port that the label printer is connected to.
Protocol	Select the printing protocol your system uses for label printers.
LPR Server	Enter the server your laser printer is connected to.
Language	Select the name of the proprietary language the label printer uses to determine the layout of text on the label.
User Name	Enter your user name.
Password	Enter your password.
Confirm Password	Re-enter your password.
Max Retries	Enter the number of times that you want the label printer to retry printing if there is an error.
Retry Timeout	Enter the number of seconds that you want the label printer to wait before trying to print after an error.

5. Click Add to save the printer information.

The Add Printer confirmation page appears.

6. Click OK to return to the Printer Management page.

Modifying Printers

Use this procedure to modify a printer connected to your system.

Need More Details? Check out the following concepts:

- "How Do I Manage Printers?" on page 19

STEPS

To modify a printer

1. Select Printer Management in the Administration menu.
2. Select Printers > Modify/Delete on the Printer Management page.

   The Search for a Printer to Modify or Delete page appears.
3. Consider the following fields.

TIP Click Show All to show all printers in the Surgical Instrument Management system.

Company	Select the company of the printer that you want to modify.
Printer Name	Enter the name of the printer that you want to modify.
Printer Hostname	Enter the hostname of the printer that you want to modify.
Printer Type	Select either Report or Label depending on what type of printer that you want to modify.

4. Click Search to display the printers that fit your search criteria.

   The Select Printer to Modify or Delete page appears.
5. Click Edit in the row of the printer that you want to modify.

   The Modify Printer page appears.
6. On the Modify Printer page, consider the following fields.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

Printer Name	Edit the name of the printer you are adding.
Hostname	Edit the network address or IP address for the printer.
Type	Select the type of printer that you want to add. • Report – A printer that prints documents on the standard 8.5 x 11 inch paper stock. • Label – A specialized printer for labels that uses a language to describe the layout of information on a label. **NOTE** See below for information for modifying label printers (Step 7).

Company	Select the company you make the printer accessible from.
Company Default	Select this check box to make the printer you are modifying the default printer for the selected company.

7. Consider the following Label Printer Details fields if the printer you are modifying is a label printer.

Make	Edit the brand name of the label printer.
Model	Edit the model number of the label printer.
Port	Edit the port that the label printer is connected to.
Protocol	Select the printing protocol your system uses for label printers.
LPR Server	Edit the server your laser printer is connected to.
Language	Select the name of the proprietary language the label printer uses to determine the layout of text on the label.
User Name	Edit your user name.
Password	Edit your password.
Confirm Password	Re-enter your password.
Max Retries	Edit the number of times that you want the label printer to retry printing if there is an error.
Retry Timeout	Edit the number of seconds that you want the label printer to wait before trying to print after an error.

8. Click Done to save the printer information.

   The Modify Printer confirmation page appears.
9. Click OK to return to the Printer Management page.

Deleting Printers

Use this procedure to delete a printer from your system.

Need More Details? Check out the following concepts:

- "How Do I Manage Printers?" on page 19

STEPS

To delete a printer

1. Select Printer Management in the Administration menu.
2. Select Printers > Modify/Delete on the Printer Management page.

   The Search for a Printer to Modify or Delete page appears.
3. Consider the following fields.

TIP Click Show All to show all printers in the Surgical Instrument Management system.

Company	Select the company of the printer that you want to delete.
Printer Name	Enter the name of the printer that you want to delete.
Printer Hostname	Enter the hostname of the printer that you want to delete.
Printer Type	Select either Report or Label depending on what type of printer that you want to delete.

4. Click Search to display the printers that fit your search criteria.
   The Select Printer to Modify or Delete page appears.
5. Click the Delete button in the row of the printer that you want to delete.

   The Delete Printer page appears.
6. Click OK to delete the selected printer.
7. Click Done to save the printer information.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

Mapping Printers to Locations

Use this procedure to map printers to the locations in your company.

Need More Details? Check out the following concepts:

- "How Do I Manage Printers?" on page 19

STEPS

To map a printer to a location

1. Select Printer Management in the Administration menu.
2. Select Printers > Map to Locations on the Printer Management page.

   The Map Printers to Location page appears.
3. Consider the following fields.

Company	Select the company to which you want to map the printer.
Location	Select the location in the company to which you want to map the printer.

4. Select the check boxes of the printers in the All Printer in Company list that you want to map to a location.
5. Click Add.

   The printers you selected are added to the Printers Mapped to Location list.

   To remove printers from the Printers Mapped to Location list, select the check box next to the printers that you want to remove and click Remove.
6. When you are finished with mapping printers to a location, click Done.

Mapping Label Printers to Workstations

Use this procedure to map label printers to the workstations in your company.

Need More Details? Check out the following concepts:

- "How Do I Manage Printers?" on page 19

STEPS

To map a label printer to a workstation

1. Select Printer Management in the Administration menu.
2. Select Printers > Map Label Printers to Workstations on the Printer Management page.

   The Map Label Printers to Workstations page appears.
3. Consider the following fields.

Company	Select the company for which you want to map a label printer to a workstation.

4. Click Add Workstation.

   The Add Label Printer to Workstation Mapping popup window appears.
5. Consider the following fields.

Label Printer	Select the label printer that you want to map to the workstation.
Workstation	Enter the IP address for the workstation to which you want to map the label printer.

6. Click OK.
7. If you already have a label printer mapped to a workstation, but want to change the workstation it is mapped to, click Edit on the Map Label Printers to Workstations page.

   The Edit Label Printer to Workstation Mapping popup window appears.
8. Enter the IP address for the workstation to which you want to map the label printer.
9. Click OK.
10. If you want to delete label printer and workstation associations, on the Map Label Printers to Workstations page do one of the following.
    - Click Delete in the row of the printer name and click OK when prompted to delete the association
    - Select the check boxes of the rows of printer associations that you want to delete and click Delete Checked.
11. When you are finished adding or modifying printer-workstation associations, click Done.

Chapter 3

Working with Tray Lists

This chapter explains how to add, clone, and modify tray lists; replace or remove items from tray list; run tray list reports; and add or delete tray list values.

Concepts in This Chapter

TIP To skip directly to the procedures, see "Procedures in This Chapter" on page 69.

The following concepts provide background and conceptual information for the procedures within this chapter.

What Is a Tray List?

Surgical instrument trays must be assembled in a very precise manner, and trays can be very different in their content and layout. A detailed list of the contents of a surgical instrument tray is referred to as a tray list. Going beyond a plain list of contents, the tray list identifies the order of the instruments, the quantity of the instruments, and how the instruments should be bundled. Some instruments, for example, might be on a stringer, while others are in a terry towel at the bottom of the pan. The tray list defines all of the details of the content and layout of the tray. For one tray list, there can be many physical trays.

What Is a Tray ID?

A tray ID is an identification tag with a five-digit ID number that is permanently affixed to a tray. When a tray ID is associated with a tray list, a user can scan the tray ID to determine which items are required on the physical tray.

What Is a Peel Pack?

A peel pack is a sealed plastic pouch that contains one or more instruments. Peel packs accompany a tray and have their own tray lists. Peel packs are also called specials or pickies.

Procedures in This Chapter

This section provides procedural guidance on using the web application to perform use the Tray List functions in the Surgical Instrument Management application.

Adding Tray Lists

Use this procedure to add tray lists to the Surgical Instrument Management application.

Need More Details? Check out the following concepts:

- "What Is a Tray List?" on page 68
- "What Is a Tray ID?" on page 68
- "What Is a Peel Pack?" on page 68

STEPS **To add tray lists**

1. Select Tray List Management in the Surgical Instrument Management menu.
2. Select Tray List > Add on the Tray Lists page.

   The Add New Tray List Information page appears.
3. Consider the following fields.

Company	Select the company to which you want to add the tray list.
Instrument Source	Select the instrument source from which the items for the tray list come.
Tray List Name	Enter a descriptive name for the tray list.
Peel Pack	Select this check box if the tray list is a peel pack.
Storage Location	Select the storage location where the tray is stored.
Charge Code	Enter the charge code associated with the tray.
Sub Location	Select the sub-location of the storage location if applicable.
Sterilization	Select the sterilization type the tray receives after use.
Tray List Ref	Enter an alternate identification for the tray list.
Service	Select the department that the tray is associated with.

Color	Select the type of color packaging or signifier used to distinguish the tray. Some companies use color coding to identify service types. If you do not use color coding on your trays, leave this field blank.
Header Note	Enter details or any special instructions to appear in the header.
Footer Note	Enter details or any special instructions to appear in the footer.
Image Location	Enter the path for the image that you want to associate with the tray list. You can also click Browse to search for the image on your computer. Make sure that you specify a location that can be accessed by Surgical Installation Management—usually the network drive on which the application is installed. Click View Image to preview the image.

4. Click Next.

   The Tray List page appears.

5. Consider the following fields.

Group	Select the group that the items in the tray list will belong to. A group categorizes items into different physical section of the tray. **NOTE** You need to first add groups in the List Values procedure to create available groups. See "To add a list value" on page 82 for more information.
Item Number	Enter the full item number of the item to add to the tray list. The item number is a unique identifier that is assigned by the application when the item is created. **TIP** If you don't know the item number, click Search for Item and follow the steps in "To search for items to add to tray lists" on page 73
Qty.	Enter the quantity of the item that you want to add to the tray list.
Display Mfg. Nbr.	Select this check box to show the manufacturer number for the item you add to the tray list. Use this when a surgeon wants to use a specific brand of instrument. For generic items, leave the field empty.

6. Click Add Item to add the item to the tray list.

   To search for an item to add to the tray list, see "Searching for Items to Add to Tray Lists" on page 73.

   The item is added to the tray list.

7. Consider the following fields in the tray list.

Group Header Note	Displays notes for the item group. Click Add Group Header to enter a note relating to the current item group.
Seq	This field displays the order in which the items for the group are organized. All items and groups should be listed in the order they should be assembled. Use the Seq field next to the index number to order the items in the group in accordance with the tray list assembly process. If an item in a group should not be assembled first for that group but should be assembled second, enter 2 in the text box and click the Change Order button to move the item to its correct position.
Item Number	Displays the number for the selected item.
Show	Select this check box to show the manufacturer number for the selected item in the tray assembly and on the count sheet.
Mfg Nbr	Displays the manufacturer number for the selected item, if the Show check box is selected.
Description	Displays the description of the item as it appears in the system.
Add Comment	Click Add Comment to enter a comment relating to this item.
Tracked	Specifies items that are tracked by the system.
Qty.	Enter the quantity for the items.
Remove	Click this icon in the row of the item that you want to remove from the item group.

8. To edit the header information for the tray list, click Edit Header at the top of the page.

   The Modify Tray List Header Information page appears.

9. Consider the following fields.

Tray List Name	Enter the name of the tray list that you want to clone.
Active	Displays the activity status of the tray list.

Storage Location	Select the storage location where the tray list is stored.
Charge Code	Enter the charge code associated with the tray list.
Sub-Location	Select the sub-location where the tray is stored.
Sterilization	Select the sterilization method of the tray list.
Tray List Ref.	Enter the reference number for the tray list.
Service	Select the service of the tray list.
Color	Select the color packaging of the tray list.
Header Note	Enter details or any special instructions to appear in the header.
Footer Note	Enter details or any special instructions to appear in the footer.
Image Location	Enter the path for the image that you want to associate with the tray list. You can also click Browse to search for the image on your computer. Make sure that you specify a location that can be accessed by Surgical Installation Management—usually the network drive on which the application is installed. Click View Image to preview the image.

10. Click Next to return to the Tray List.
11. Click Complete List when you have finished adding items to the tray list.

    The Add New Tray List Process Complete page appears.
12. Click OK to return to the Add New Tray List Information page.

Searching for Items to Add to Tray Lists

Use this procedure to search for items in the Tray Lists Instrument Source Location.

Need More Details? Check out the following concepts:

- "What Is a Tray List?" on page 68
- "What Is a Tray ID?" on page 68

STEPS

To search for items to add to tray lists

1. When adding an item to a tray list, click Search for Item on the Tray List page.

   The Find Item in Catalog to Add to Tray List popup window appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

2. Consider the following fields.

Item Number	Enter the number of the item that you want to add to the tray list.
Description	Enter the description of the item that you want to add.
Mfg Nbr	Enter the manufacturer number or partial manufacturer number of the item that you want to add to the tray list.
Mfg Name	Select the manufacturer name of the item that you want to add to the tray list.

NOTE If you are unable to find the appropriate item to add to the tray list, you need to first add the item to the item catalog. See "To add items" on page 45 for more information.

3. Click Search to display the items that match your search criteria.

   The Select an Item to Add to Count Sheet popup window appears.

4. Enter a Quantity for the desired item, and click Add.

   The item is added to the count sheet in the group you selected.

Cloning Tray Lists

Use this procedure to clone tray lists in the Surgical Instrument Management application.

If you need to create a new tray list, and you know that the system already includes a similar tray, use the Clone function to quickly create a duplicate. Then simply modified the cloned tray to meet your needs—it is quicker than creating a new tray list from scratch.

Need More Details? Check out the following concepts:

- "What Is a Tray List?" on page 68
- "What Is a Tray ID?" on page 68
- "What Is a Peel Pack?" on page 68

STEPS **To clone tray lists**

1. Select Tray List Management in the Surgical Instrument Management menu.
2. Select Tray List > Clone on the Tray Lists page.

   The Select Location for New Tray List appears.
3. Consider the following fields.

Company	Select the company where you want to clone the existing tray.
Instrument Source	Select the instrument source where you want to clone the existing tray.

4. Click Enter.

   The Search for Tray List to Clone page appears.
5. Consider the following fields.

TIP To search for all tray lists, leave the fields blank.

Company	Select the company you where the tray list is that you want to clone.
Instrument Source	Select the instrument source location where the tray list is that you want to clone.
Tray List Number	Enter the number for the tray list that you want to clone.
Tray List Name	Enter the name of the tray list that you want to clone.
Storage Location	Select the storage location where the tray that you want to clone is stored.
Tray List Ref	Enter the reference number for the tray list that you want to clone.
Sub-Location	Select the sub-location where the tray that you want to clone is stored.
Charge Code	Enter the charge code associated with the tray list that you want to clone.
Service	Select the service of the tray list that you want to clone.
Sterilization	Select the sterilization method of the tray list that you want to clone.
Color	Select the color packaging of the tray list that you want to clone.

Containing Item Number	Enter an item number that is contained in the tray list that you want to clone.
Peel Pack	Select this check box to search for a peel pack that you want to clone.

6. Click Search to display the items that fit your search criteria.

   The Choose a Tray List to Clone page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

7. Click Clone in the row of the tray list that you want to clone.

   NOTE The system validates that all Procurement item numbers exist in the new tray list instrument source. If they do not exist in the instrument source you chose, a message appears listing the items that do not exist in the instrument source and prompts you to add them add them to the instrument source location.

   The Edit New Tray List Information page appears.

8. Consider the following fields.

Tray List Name	Enter a descriptive name for the tray list.
Active	Select this check box if the tray list is active.
Storage Location	Select the storage location where the tray is stored.
Charge Code	Enter the charge code associated with the tray.
Sub Location	Select the sub-location of the storage location if applicable.
Sterilization	Select the sterilization type the tray receives after use.
Tray List Ref	Enter an alternate identification for the tray list.
Service	Select the department that the tray is associated with.
Color	Select the type of color packaging or signifier used to distinguish the tray. This usually refers to the tape color on an instrument.
Header Note	Enter details of any special instructions on starting the tray assembly.
Footer Note	Enter details of any special instructions to finish the tray assembly.
Image Location	Enter the path for the image that you want to associate with the tray list. You can also click Browse to search for the image on your computer. Click View Image to preview the image.

9. Click Next.

   The Tray List page appears.

10. Click Edit Header to edit the header information on the Modify Tray List Header Information page.
11. Consider the following fields.

Group	Select the group that the items in the tray list will belong to. A group is a cluster of items that is separated from the rest of the items in the tray assembly.
Item Number	Enter the full item number of the item to add to the tray list. The item number is a unique identifier that is assigned by the application when the item is created.
Qty.	Enter the quantity of the item that you want to add to the tray list.
Display Mfg. Nbr.	Select this check box to show the manufacturer number for the item you add to the tray list.

12. Click Add Item to add the item to the tray list.
    The item is added to the tray list.
13. Consider the following fields.

TIP If you do not know the item number, click Search for Item and follow the steps in "To search for items to add to tray lists" on page 73

Group Header Note	Displays notes for the item group. Click Add Group Header to enter a note relating to the current item group.
Sequence	This field displays the order in which the items for the group are organized. All items and groups should be listed in the order they should be assembled.
Move Item	Use the field next to the sequence number to order the items in the group in accordance with the tray list assembly process. If an item in a group should not be assembled first for that group but should be assembled second, enter 2 in the text box and click the Change Order (curved arrow) icon to move the item to its correct position.
Change Group	Click the G icon to move items to other groups. See "To move items between groups" on page 80 for more information.
Item Number	Displays the number for the selected item.
Show	Select this check box to show the manufacturer number for the selected item.
Mfg Nbr	Displays the manufacturer number for the selected item, if the Show check box is selected.
Description	Displays the description of the item as it appears in the system.

Add Comment	Click Add Comment to enter a comment relating to this item.
Tracked	Specifies items that are tracked by the system.
Qty.	Enter the quantity of items that you want to add to the item group.
Remove	Click this icon in the row of the item that you want to remove from the item group.

14. Click Complete List when you have finished adding items to the tray list clone.

    The Add Tray List Process Complete page appears.

15. Click OK.

Modifying Tray Lists

Use this procedure to modify existing tray lists for the Surgical Instrument Management application.

Need More Details? Check out the following concepts:

- "What Is a Tray List?" on page 68
- "What Is a Tray ID?" on page 68
- "What Is a Peel Pack?" on page 68

STEPS

To modify tray lists

1. Select Tray List Management in the Surgical Instrument Management menu.
2. Select Tray List > Modify on the Tray Lists page.

   The Search for Tray List to Modify page appears.

3. Consider the following fields.

TIP To search for all tray lists, leave the fields blank.

Company	Select the company of the tray list that you want to modify.
Instrument Source	Select the instrument source of the tray list that you want to modify.
Tray List Number	Enter the number of the tray list that you want to modify.
Tray List Name	Enter the name of the tray list that you want to modify.
Storage Location	Select the storage location where the tray is stored.
Tray List Ref	Enter the reference number of the tray list that you want to modify.

Sub-Location	Select the sub-location where the tray that you want to modify is stored.
Charge Code	Enter the charge code for the tray list that you want to modify.
Service	Select the department that the tray is associated with.
Sterilization	Select the sterilization method of the tray list that you want to modify.
Color	Select the color packaging of the tray list that you want to modify.
Containing Item Number	Enter an item number that is contained in the tray list that you want to modify.
Peel Pack	Select this check box to search for a peel pack that you want to modify.

4. Click Search to display the tray lists that fit your search criteria.

   The Choose a Tray List to Modify page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

5. Click Modify in the row of the tray list that you want to modify.

   The Modify Tray List Header Information page appears.

6. Consider the following fields.

Tray List Name	Enter a descriptive name for the tray list.
Active	Indicates if the selected tray list is active.
Storage Location	Select the storage location where the tray is stored.
Charge Code	Enter the charge code associated with the tray.
Sub Location	Select the sub-location of the storage location if applicable.
Sterilization	Select the sterilization type the tray receives after use.
Tray List Ref	Enter an alternate identification for the tray list.
Service	Select the department that the tray is associated with.
Color	Select the type of color packaging or signifier used to distinguish the tray. This usually refers to the tape color on an instrument.
Header Note	Enter details of any special instructions on starting the tray assembly.
Footer Note	Enter details of any special instructions to finish the tray assembly.

Image Location	Enter the path for the image that you want to associate with the tray list. You can also click Browse to search for the image on your computer. Click View Image to preview the image.

7. Click Next.

   The Tray List page appears.
8. Click Edit Header to edit the header information on the Modify Tray List Header Information page.
9. Consider the following fields.

Group	Select the group that the items in the tray list will belong to. A group is cluster of items that is separated from the rest of the items in the tray assembly.
Item Number	Enter the full item number of the item to add to the tray list. The item number is a unique identifier that is assigned by the application when the item is created.
Qty.	Enter the quantity of the item that you want to add to the tray list.
Display Mfg. Nbr.	Select this check box to show the manufacturer number for the item you add to the tray list.

10. Click Add Item to add the item to the tray list.
    The item is added to the tray list.

TIP If you do not know the item number, click Search for Item and follow the steps in "To search for items to add to tray lists" on page 73.

11. Consider the following fields.

Group Header Note	Displays notes for the item group. Click Add Group Header to enter a note relating to the current item group.
Sequence	This field displays the order in which the items for the group are organized. All items and groups should be listed in the order they should be assembled.
Move Item	Use the field next to the sequence number to order the items in the group in accordance to the tray list assembly process. If an item in a group should not be assembled first for that group but should be assembled second, enter 2 in the text box and click the Change Order (curved arrow) icon to move the item to its correct position.
Change Group	Click the G icon to move items to other groups. See "To move items between groups" on page 80 for more information.
Item Number	Displays the number for the selected item.

Show	Select this check box to show the manufacturer number for the selected item.
Mfg Nbr	Displays the manufacturer number for the selected item, if the Show check box is selected.
Description	Displays the description of the item as it appears in the system.
Add Comment	Click Add Comment to enter a comment relating to this item.
Tracked	Specifies items that are tracked by the system.
Qty.	Enter the quantity of items that you want to add to the item group.
Remove	Click this icon in the row of the item that you want to remove from the item group.

12. Click Complete List when you have finished adding items to the modified tray list.

    The Modify Tray List Process Complete page appears.
13. Click OK.

STEPS To move items between groups

1. On the Tray List page, click the G icon.

   The Change Group popup window appears.
2. Consider the following fields.

New Group	Select the new group to which you want to move the item.
Position After Item	Select the item after which you want to place the item you are moving.

3. Click Change.

Viewing and Printing Tray Lists

Use this procedure to view and print tray lists.

Need More Details? Check out the following concepts:

- "What Is a Tray List?" on page 68
- "What Is a Tray ID?" on page 68
- "What Is a Peel Pack?" on page 68

STEPS To view or print tray lists

1. Select Tray List Management in the Surgical Instrument Management menu.
2. Select Tray List > View/Print on the Tray Lists page.

The Search for Tray List to View/Print page appears.

3. Consider the following fields.

TIP To search for all tray lists, leave the fields blank.

Company	Select the company you of the tray list that you want to view or print.
Instrument Source	Select the instrument source from which the items for the tray list come.
Tray List Number	Enter the number of the tray list that you want to view or print.
Tray List Name	Enter the name of the tray list that you want to view or print.
Storage Location	Select the storage location where the tray is stored.
Tray List Ref	Enter the reference number for the tray list that you want to view or print.
Sub Location	Select the sub-location of the storage location if applicable.
Charge Code	Enter the charge code associated with the tray that you want to view or print.
Service	Select the department that the tray is associated with.
Sterilization	Select the sterilization type the tray receives after use.
Color	Select the type of color packaging or signifier used to distinguish the tray. This usually refers to the tape color on an instrument.
Containing Item Number	Enter an item number to search for the tray list containing that item.
Show only Tray Lists with individually tracked Items	Select this check box if you only want to view or print tray lists that contain individually tracked Items.
Peel Pack	Select this check box if the tray list is a peel pack.

4. Click Search to display tray lists that fit your search criteria.

   The Choose a Tray List to View/Print page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

5. Click View/Print beside the desired tray list.

   The printable version of the tray list appears.

6. Click Print Sheet to print the tray list.
7. Click Done to return to the Search for Tray List to View/Print page.

Adding Tray List Values

Use this procedure to add values for the Service, Sterilization, Color, or Group lists. These settings affect the values that appear in drop-down fields for tray lists, and categories for grouping items within trays.

STEPS **To add a list value**

1. Select SIM Configuration in the Surgical Instrument Management menu.
2. Select List Values > Add on the SIM Configuration page.

   The Add Collection Value page appears.
3. Consider the following fields.

Add Value	Enter the value that you want to add to the collection.
To	Select the collection to which you want to add the value.

4. Click Add.

   The Add Collection Value confirmation page appears.
5. Click OK.

Deleting Tray List Values

Use this procedure to delete values for the Service, Sterilization, Color, or Group lists. These settings affect the values that appear in drop-down fields for tray lists, and categories for grouping items within trays.

STEPS **To delete a list value**

1. Select SIM Configuration in the Surgical Instrument Management menu.
2. Select List Values > Delete on the SIM Configuration page.

   The Delete Collection Value page appears.
3. Consider the following fields.

Delete From	Select the collection from which you want to delete the value.
Value	Select the value that you want to delete from the collection.

4. Click Delete.

   The Delete Collection Value confirmation page appears.
5. Click OK.

Replacing Tray List Items

Use this procedure to replace a single item in a bulk replacement for another item across multiple tray lists.

Need More Details? Check out the following concepts:

- "What Is a Tray List?" on page 68
- "What Is a Tray ID?" on page 68

STEPS

To replace a tray list item

1. Select Tray List Management in the Surgical Instrument Management menu.
2. Select Tray List Item > Replace Item on the Tray Lists page.

   The Search for an Item to Replace in Tray Lists page appears.
3. Consider the following fields.

TIP To search for all items, leave the fields blank.

Company	Select the location of the item that you want to replace.
Location	Select the location of the item that you want to replace from the drop-down list.
Item Number	Enter the number of the item that you want to replace.
Item Description	Enter the description of the item that you want to replace.
Mfg Nbr	Enter the number of the manufacturer for the item that you want to replace.
Mfg. Name	Select the name of the manufacturer for the item that you want to replace.

4. Click Search to display the items that fit your search criteria.

   The Select Item to Be Replaced page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

5. Click Select in the row of the item that you want to replace.

   The Enter Replacement Item Number page appears.
6. Consider the following fields.

Item Number	Enter the number of the item with which you want to replace the original item.
Item Description	Enter the description of the item with which you want to replace the original item.
Mfg Nbr	Enter the number of the manufacturer of the item with which you want to replace the original item.
Mfg. Name	Select the name of the manufacturer of the item with which you want to replace the original item.

Individually Tracked	Select to find items that have instruments that are individually tracked.

7. Click Search.

   The Select Replacement Item page appears.

8. Click Replace on the row of the item that you want to replace.

   The Replace Item page appears.

9. Click OK to replace the original item with the replacement.

   The Replace Item confirmation page appears.

10. Click Done to return to the Search for an Item to Replace in Tray Lists page.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

Removing Tray List Items

Use the remove a tray list item to remove a single item in a bulk removal for another item across multiple tray lists.

Need More Details? Check out the following concepts:

- "What Is a Tray List?" on page 68
- "What Is a Tray ID?" on page 68

STEPS

To remove a tray list item

1. Select Tray List Management in the Surgical Instrument Management menu.
2. Select Tray List Item > Remove Item on the Tray Lists page.

   The Search for an Item to Remove from Tray Lists page appears.
3. Consider the following fields.

Company	Select the company of the item that you want to remove.
Location	Select the location of the item that you want to remove.
Item Number	Enter the number of the item that you want to remove.
Item Description	Enter the description of the item that you want to remove.
Mfg Nbr	Enter the number of the manufacturer for the item that you want to remove.
Mfg. Name	Select the name of the manufacturer for the item that you want to remove.

   To search for all items, leave the fields blank.
4. Click Search to display the items that fit your search criteria.

   The Select Item to Be Removed from Tray Lists page appears.
5. Click Select in the row of the item that you want to replace.

   The Remove Item from Tray Lists page appears.
6. Click OK to remove the item from the tray list.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

Chapter 4

Working with Tray Management

This chapter explains how to associate and disassociate tray lists and tray IDs, and how to designate a tray as hot.

Concepts in This Chapter

TIP To skip directly to the procedures, see "Procedures in This Chapter" on page 89.

The following concepts provide background and conceptual information for the procedures within this chapter.

What is a Hot Tray?

A hot tray is a tray that is designated as high priority and that needs to be expedited through each process.

Procedures in This Chapter

This section provides procedural guidance on associating and disassociating trays and tray lists, and managing hot trays.

Associating Trays with Tray Lists

Use this procedure to associate trays with tray lists. In order to assemble a tray, you must first associate the tray ID to a tray list.

STEPS To associate trays with tray lists

1. Select Tray Management from the Surgical Instrument Management menu.
2. Select Associate on the Tray Management page.

   The Enter a Tray ID for Association appears.
3. Consider the following fields.

Company	Select the company where the tray is used.
Instrument Source	Select the source location of the instruments for the tray.
Tray ID	Enter the identification number from the label attached to the tray that you want to associate with a tray list. You can also scan the bar code of the tray ID to enter it into the system.

4. Click Enter.

   The Associate Tray ID with a Tray List Number page appears.
5. Enter the number for the tray list in the Tray List Number field.
6. If you need to search for a tray list, click Search for Tray List.

   The Search for Tray List to Modify to Associate page appears.

NOTE To search for all tray lists, leave the fields blank.

7. Consider the following fields.

Tray List Number	Enter the number of the tray list that you want to associate with the selected tray.
Tray List Name	Enter the name of the tray list that you want to associate with the selected tray.
Storage Location	Select the location where the tray list is stored.
Tray List Ref.	Enter the tray list reference number of the tray list that you want to associate.

Sub-Location	Select the sub-location where the tray list is stored.
Charge Code	Enter the charge code for the tray list that you want to associate.
Service	Select the department that the tray list is associated with.
Sterilization	Select the sterilization type the tray receives after use.
Color	Select the type of color packaging or signifier used to distinguish the tray. This usually refers to the tape color on an instrument.

8. Click Search to display the tray lists that fit your search criteria.

   The Choose a Tray List Number to Associate to a Tray page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

9. Select Select in the row of the tray list that you want to associate to the selected tray.
10. Click Select.
11. Select Hot on the Associate Tray ID with a Tray List Number page to designate the selected tray as urgent.
12. Click Associate.

    The Associate the Tray ID with a Tray List Number confirmation page appears.
13. Click OK to return to the Enter a Tray ID for Association page.

Disassociating Trays Lists from Trays

Use this procedure to disassociate tray lists from trays. When a tray ID is no longer required for use for a tray list, you can disassociate the tray ID from the tray list.

STEPS To disassociate tray lists from trays

1. Select Tray Management from the Surgical Instrument Management menu.
2. Select Disassociate on the Tray Management page.

   The Enter a Tray ID for Disassociation appears.
3. Enter or scan the tray ID number in the Tray ID field.
4. Click Enter.

   The Disassociate a Tray from a Tray List Number appears.
5. Click Disassociate.

   The Disassociate a Tray from a Tray List Number confirmation page appears.
6. Click OK to return to the Enter a Tray ID for Disassociation page.

Managing Hot Trays

Use this procedure to label urgently needed trays as hot. You can mark an entire tray as hot (so that all tray IDs associated with the tray list are marked as hot) or mark specific tray IDs as hot.

STEPS **To manage hot trays**

1. Select Tray Management from the Surgical Instrument Management menu.
2. Select Hot Trays on the Tray Management page.

   The Hot Tray Management Search page appears.
3. Consider the following fields.

Company	Select the company where the tray is used.
Instrument Source	Select the source location of the instruments for the tray.
Tray List Number	Enter the number of the tray list that you want to expedite.
Tray List Reference	Enter the tray list reference number of the tray list that you want to expedite.
Tray List Name	Enter the name of the tray list that you want to expedite.
Service	Select the department that the tray list is associated with.
Expedite Status	Select either Standard or Hot to search for specific status of trays.
Tray ID	Enter the identification number from the label attached to the tray that you want to expedite.
Containing Item Number	Enter an item number to search for the tray list containing that item.

4. Click Search to display the tray lists that fit your search criteria.

   The Select Tray page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

5. Click Select in the row of the tray list for which you want to change the expedite status.

   The Manage Hot Trays page appears.
6. Select the Hot check box in the Tray List row to select all trays associated with the tray list as hot.

   If you want to label one tray as hot, select the Hot check box in the row of the tray that you want to expedite.

   NOTE A tray list remains hot until you remove the hot designation. To remove the hot designation, select the Hot check box to unmark the box.

7. Click Update to change the status.

The Manage Hot Trays confirmation page appears.

8. Click OK to return to the Tray Management page.

Chapter 5

Working with Tray Assembly

The Tray Assembly module provides you with detailed assembly instructions for trays, and peel pack and loaner trays. You can also print and reprint assembly information for any of the packages that get assembled.

Concepts in This Chapter

What Is Tray Assembly?

The purpose of tray assembly is to assemble trays of surgical instruments for specific surgical procedures for use in the operating room. As trays come out of the tunnel washer in decontamination, trays and instruments then move to the tray assembly area. Instruments often arrive in a jumble. Surgical Processing Department technicians empty the instruments onto a table at a workstation and use assembly instructions on tray lists to place the instruments in a precise order. After assembling the tray, the technician wraps the tray in cloth or places the tray in a metal container in preparation for the next stage of the instrument life cycle: sterilization.

What Is an Assembly ID?

An assembly ID (ASID) is a sequential serial number assigned by Lawson Surgical Instrument Management at the point of completing a tray assembly.

What Is a Peel Pack?

A peel pack is a sealed plastic pouch that contains one or more instruments. Peel packs have their own tray lists. However, they do not have tray IDs. Peel packs are also called specials or pickies.

What Is an Exception?

An exception is the difference in items currently in a tray and items listed in the tray list. During tray assembly, technicians note differences, record exceptions, and label the surgical tray appropriately. Examples of exceptions include shortages (for example, there may only be five clamps in the tray when there should be six) and substitutions when an alternate instrument is used if the standard instrument is unavailable.

What Exceptions Can Be Logged for Tracked Instruments?

For instrument-level exceptions, the user can log three exceptions:

- Damaged

  A Damaged instrument can be Replaced, Substituted, or Removed.
- Missing

  A Missing instrument can be Replaced, Substituted, or Report Short.
- Unknown ID

  An Unknown ID instrument can be Pass or Hold.

NOTE If an instrument has already been scanned, the only instrument-level exception that can be logged is the **Damaged** exception.

For exceptions that are logged against tracked instruments, the following restrictions apply:

- **Replaced** instruments can be replaced by instruments of the same item. Users are required to scan a Replaced Instrument ID since this item is an instrument-tracked item for that source location.
- **Substituted** instruments can be replaced by a different item. They can be replaced by instrument-tracked items or non-instrument-tracked items. If they are replaced by instrument-tracked items for that source location, instrument IDs are required to be scanned; if they are replaced by non-instrument-tracked items, instrument IDs are not required.
- Marking an instrument **Removed**, **Report Short**, or **Unknown ID** will bring the user to a screen asking if they want to **Pass** or **Hold** the tray.

What Is a Loaner?

A loaner set, or specialty tray, is a set of instruments that is used for a procedure, but is not owned by the hospital. Instead of purchasing the loaner set, the hospital uses the instrument set for a specific procedure and returns it to the vendor.

Procedures in This Chapter

This section provides procedural guidance on assembling trays, peel packs, and loaner trays, recording exceptions and reprinting assembly labels.

Configuring Tray Assembly

Use this procedure to display the screen timer and set the number of tray list columns when you assemble trays.

NOTE For information on logging exceptions against tracked instruments, see "What Exceptions Can Be Logged for Tracked Instruments?" on page 95.

Need More Details? Check out the following concepts:

- "What Is Tray Assembly?" on page 94

STEPS **To configure Tray Assembly**

1. Select SIM Configuration in the Surgical Instrument Management menu.
2. Select Tray Assembly on the SIM Configuration page.

   The Modify System Configuration Settings page appears.
3. Consider the following fields.

Display Screen Timer	Select Yes to display the screen timer that will monitor the time it takes to assemble a tray.
Number of Count Sheet Columns	Select the number of columns that appear in the tray list.

4. Click Modify.

   The Modify System Configuration Settings confirmation page appears.
5. Click OK to return to the Tray Assembly page.

Assembling Trays

Use these procedures to assemble trays, record item exceptions, add notes for the whole tray list or line items, and hold incomplete tray assemblies.

Need More Details? Check out the following concepts:

- "What Is Tray Assembly?" on page 94
- "What Is a Tray List?" on page 68
- "What Is a Tray ID?" on page 68
- "What Is an Exception?" on page 94

STEPS

To assemble trays

1. Select Tray Assembly in the Surgical Instrument Management menu.
2. Select Assemble Tray on the Tray Assembly page.

   The Enter Tray Information page appears.
3. Consider the following fields.

Company	Select the company where the technician assembles the tray.
Assembly Location	Select the location where the technician assembles the tray.
Tray ID	Enter the five-digit identification number attached to the tray that the technician assembles.

NOTE You also have the option of scanning instruments using the handheld device to be included in the assembly.

4. Click Enter.

   The Tray List page appears.
5. Consider the following controls.

Hide/Show Header	Click Hide Header if the header appears to hide the tray list header information or Show Header if the header does not appear to show the tray list information.
Item Image	Click the camera icon to display an image of the selected item.
Item Detail	Click the item number in the row of an item to view details about the selected item.

TIP Click Print to print the tray list if you need to assemble the tray away from the computer screen.

6. Assemble the tray as instructed on the tray list.
7. Record exceptions, add notes, or put the tray on hold if you need to. For details see "To record overage exceptions" on page 100, "To replace damaged or missing items" on page 100, "To substitute damaged or missing items" on page 100, "To remove damaged items or short missing items" on page 102, "To add assembly line notes" on page 103, and "To hold trays" on page 104.

NOTE For information on logging exceptions against tracked instruments, see "What Exceptions Can Be Logged for Tracked Instruments?" on page 95.

8. Click Complete when you are done assembling the tray.

   The Count Sheet Preview page appears, and the system prints an assembly label, and exception labels if exceptions exist.
9. When the printer dialog appears, click print to print the tray list.
10. Click Done to return to the Tray Assembly main page.

STEPS To assemble trays by bulk scanning items

1. Select Tray Assembly in the Surgical Instrument Management menu.
2. Select Assemble Tray on the Tray Assembly page.

   The Enter Tray Information page appears.
3. Consider the following fields.

Company	Select the company where the technician assembles the tray.
Assembly Location	Select the location where the technician assembles the tray.
Tray ID	Enter the five-digit identification number attached to the tray that the technician assembles.

4. Click Enter.

   The Tray List page appears.
5. Scan the item using the handheld device.

   The item is added to the tray list.

NOTE If the quantity scanned is more than one for the item, the individual instruments will be listed beneath the item description.

TIP Click Print to print the tray list if you need to assemble the tray away from the computer screen.

6. Identify the group and sort position for the scanned item.
7. Record exceptions, add notes, or put the tray on hold if you need to. For details see "To record overage exceptions" on page 100, "To replace damaged or missing items" on page 100, "To substitute damaged or missing items" on page 100, "To remove damaged items or short missing items" on page 102, "To add assembly line notes" on page 103, and "To hold trays" on page 104.

NOTE For information on logging exceptions against tracked instruments, see "What Exceptions Can Be Logged for Tracked Instruments?" on page 95

8. Click Complete when you are done assembling the tray.

The Count Sheet Preview page appears, and the system prints an assembly label, and exception labels if exceptions exist.

9. When the printer dialog box appears, click Print to print the tray list.
10. Click Done to return to the Tray Assembly main page.

STEPS

To assemble trays using inline scanning

1. Select Tray Assembly in the Surgical Instrument Management menu.
2. Select Assemble Tray on the Tray Assembly page.

   The Enter Tray Information page appears.

3. Consider the following fields.

Company	Select the company where the technician assembles the tray.
Assembly Location	Select the location where the technician assembles the tray.
Tray ID	Enter the five-digit identification number attached to the tray that the technician assembles.

4. Click Enter.

   The Tray List page appears.

5. Select the bar code icon for a specific item.
6. Scan the item using the handheld device, or enter the ID number for the item.

   The item is added to the tray list.

NOTE If the quantity scanned is more than one for the item, the individual instruments will be listed beneath the item description.

7. Identify the group and sort position for the scanned item.
8. Record exceptions, add notes, or put the tray on hold if you need to. For details see "To record overage exceptions" on page 100, "To replace damaged or missing items" on page 100, "To substitute damaged or missing items" on page 100, "To remove damaged items or short missing items" on page 102, "To add assembly line notes" on page 103, and "To hold trays" on page 104.

TIP Click Print to print the tray list if you need to assemble the tray away from the computer screen.

NOTE For information on logging exceptions against tracked instruments, see "What Exceptions Can Be Logged for Tracked Instruments?" on page 95.

9. Click Complete when you are done assembling the tray.

   The Count Sheet Preview page appears, and the system prints an assembly label, and exception labels if exceptions exist.

10. When the printer dialog box appears, click Print to print the tray list.

11. Click Done to return to the Tray Assembly main page.

STEPS To record overage exceptions

1. On the Tray Assembly tray list page, click the gray exception icon in the row of the item for which you want to make an exception.

   The Report Exception page appears.
2. Consider the following fields and buttons.

Quantity	Enter the quantity of the item affected by the exception.
Comment	Enter comments describing the exception.

3. Click Over to record that the tray assembly contains an item quantity that is more than the listed quantity on the tray list.

   The Item Over popup window appears.
4. Click Close to return to the Tray Assembly tray list page.

STEPS To replace damaged or missing items

1. On the Tray Assembly tray list page, click the gray exception icon in the row of the item for which you want to make an exception.

   The Report Exception page appears.
2. Enter the quantity of the item affected by the exception in the Quantity field.
3. Enter comments describing the exception in the Comment field.
4. Click Damaged if the item is damaged or Missing if the item is missing.

   NOTE If an instrument has already been scanned, the only instrument-level exception that can be logged is the **Damaged** exception.

   The Assembly Exception - Damaged Item or Assembly Exception - Missing Item popup window appears.
5. Click Replace.

   NOTE **Replaced** instruments must be replaced by instruments of the same item. Users are required to scan a Replaced Instrument ID if the replaced item is an instrument-tracked item for that source location.

   The Damaged Item Replaced or Missing Item Replaced popup window appears.
6. Click Close to return to the Tray Assembly tray list page.

STEPS To substitute damaged or missing items

1. On the Tray Assembly tray list page, click the gray exception icon in the row of the item for which you want to make an exception.

   The Report Exception page appears.
2. Enter the quantity of the item affected by the exception in the Quantity field.

3. Enter comments describing the exception in the Comment field.
4. Click Damaged if the item is damaged or Missing if the item is missing.

NOTE If an instrument has already been scanned, the only instrument-level exception that can be logged is the **Damaged** exception.

The Assembly Exception - Damaged Item or Assembly Exception - Missing Item popup window appears.

5. Click Substitute.

NOTE **Substituted** instruments can be replaced by a different item. They can be replaced by instrument-tracked items or non-instrument-tracked items. If they are replaced by instrument-tracked items for that source location, instrument IDs are required to be scanned; if they are replaced by non-instrument-tracked items, instrument IDs are not required.

The Substitute Missing Item page appears.

6. Consider the following fields.

Item Number	Enter the identification number for the item that you want to substitute for the damaged or missing item. **NOTE** If you do not know the item number, click Search. See "To search for items to substitute" on page 101 for more information.
Quantity	Enter the quantity of the new item with which you want to substitute the damaged or missing item.
Comment	Enter comments describing the substitution.

7. Click Substitute to substitute the damaged or missing item.

The Damaged Item Exception or Missing Item Exception confirmation popup window appears.

8. Click Close to return to the Tray Assembly tray list page.

STEPS To search for items to substitute

1. In the Damaged Item Information or Missing Item Information popup window click Search.

A search window appears.

2. Consider the following fields.

Item ID	Enter the identification number for the substitute item.
Description	Enter the description or a partial description for the substitute item.

Mfg Number	Enter the manufacturer number or partial manufacturer number of the substitute item. The manufacturer number is the number the manufacturer uses to identify an item.
Mfg Name	Select the manufacturer name.

3. Click Search to display the items that fit your search criteria.

NOTE **Substituted** instruments can be replaced by a different item. They can be replaced by instrument-tracked items or non-instrument-tracked items. If they are replaced by instrument-tracked items for that source location, instrument IDs are required to be scanned; if they are replaced by non-instrument-tracked items, instrument IDs are not required.

A search results popup window appears.

4. Click Select in the row of the item with which you want to replace the damaged or missing item.

   The substitute item popup window appears.

5. Enter a Quantity and click Substitute to substitute the damaged or missing item.

   The Damaged Item Exception or Missing Item Exception confirmation popup window appears.

6. Click Close to return to the Tray Assembly tray list page.

STEPS To remove damaged items or short missing items

1. On the Tray Assembly tray list page, click the gray exception icon in the row of the item for which you want to make an exception.

   The Report Exception page appears.

2. Enter the quantity of the item affected by the exception in the Quantity field.
3. Enter comments describing the exception in the Comment field.
4. Click Damaged if the item is damaged or Missing if the item is missing.

NOTE If an instrument has already been scanned, the only instrument-level exception that can be logged is the **Damaged** exception.

The Damaged Item Information or Missing Item Information popup window appears.

5. Click Remove on the Damaged Item Information popup window or Report Short on the Assembly Exception - Missing Item popup window.

   The Missing Item - Short page appears.

6. Consider the following buttons.

Pass	Click this button to record the damaged or missing item as not replaced and to continue the tray assembly process. The count sheet reflects the missing item quantity and the system prints an exception label to reflect this change.
Hold	Click this button to record the damaged or missing item as not replaced and to hold the tray until the item can be replaced.

   The Exception Noted popup window appears.

7. Click Close to return to the Tray Assembly tray list page.

STEPS To view exceptions

1. On the Tray Assembly tray list page, click the red exception icon for an item.

   NOTE A red exception icon represents a current exception. A yellow exception icon represents that there was an exception on the previous assembly for this tray ID. You can select the previous exception for use with the current assembly.

   The Exception for Tray ID XXXXX Item XXXXXX popup window appears. The Xs indicate tray and item numbers.

2. Select the Select check box to include the exceptions that you want in the current tray assembly.
3. Click Update to update the exceptions for the current tray assembly.

STEPS To add assembly comments

NOTE Surgical Instrument Management prints the assembly comments on the count sheet.

1. In the Tray Assembly tray list page, click Comment at the top of the page. The Assembly Comment popup window appears.
2. Enter your comments for the assembly in the Record Comment for Assembly field.
3. Click Add.

   The comments appear in the Assembly Comments field in the header.

STEPS To add assembly line notes

1. In the Tray Assembly page, click the notes icon in the row of the item to which you want to add a note.

NOTE Assembly line notes are used to remind assemblers to perform an action for a specific item for the current assembly. Assembly line notes are not saved or printed on the count sheet.

The Assembly Line Note page appears.

2. Enter your note for the assembly item in the Record Note field.
3. Click Add.

   The assembly note appears under the item description.

STEPS

To hold trays

1. In the Tray Assembly tray list page, click Hold at the top of the page.

   The Tray On Hold page appears.
2. Enter your notes describing the reason you held the tray in the Record On Hold Note field.
3. Click OK.

   The system displays a message that the tray is on hold.

Assembling Peel Packs

Use this procedure to display tray list instructions associated with a peel pack. You can also track item exceptions that exist during the peel pack assembly process.

Need More Details? Check out the following concepts:

- "What Is a Peel Pack?" on page 94

STEPS

To assemble peel packs

1. Select Tray Assembly from the Surgical Instrument Management menu.
2. Select Assemble Peel Pack on the Tray Assembly page.

   The Search for Peel Pack to Assemble page appears.
3. Consider the following fields.

TIP To search for all peel packs, leave the fields blank.

Company	Select the company where you want to use the peel pack.
Assembly Location	Select the location where you assemble the peel pack.
Instrument Source	Select the instrument source from which the peel pack items come.
Tray List Number	Enter the number for the tray list of the peel pack that you want to assemble.
Tray List Name	Enter the name of the tray list of the peel pack that you want to assemble.
Tray List Ref.	Enter the tray list reference number of the peel pack that you want to assemble.

Charge Code	Enter the charge code associated with the peel pack that you want to assemble.
Service	Select the service of the peel pack that you want to assemble.
Storage Location	Select the storage location where the peel pack that you want to assemble is stored.
Color	Select the color packaging of the peel pack that you want to assemble.
Sub Location	Select the sub-location of the peel pack that you want to assemble.
Peel Pack	Select this check box if the tray list is a peel pack.
Sterilization	Select the sterilization method of the peel pack that you want to assemble.

4. Click Search to display the peel packs that fit your search criteria.

   The Choose a Peel Pack Tray List to Assemble page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

5. Click Assemble in the row of the peel pack that you want to assemble.

   The Tray Assembly peel pack list page appears.
6. Consider the following controls.

Peel Pack Quantity	Enter the number of peel packs that you want to assemble from the selected tray list.

TIP Click Print to print the tray list if you need to assemble the tray away from the computer screen.

7. Assemble the tray as instructed on the tray list.
8. Record or view exceptions if you need to. For details see "To record overage exceptions" on page 100, "To replace damaged or missing items" on page 100, "To substitute damaged or missing items" on page 100, "To remove damaged items or short missing items" on page 102, and"To add assembly line notes" on page 103.
9. Click Complete when you are done assembling the peel pack.

   The Print page appears.
10. Click Done to print the assembly label and the exception label if there were any exceptions.

Assembling Loaners

Use this procedures to create headers for existing tray lists that are used as loaner or temporary trays.

Need More Details? Check out the following concepts:

- "What Is a Loaner?" on page 95

STEPS **To assemble loaners**

1. Select Tray Assembly from the Surgical Instrument Management menu.
2. Select Assemble Loaner on the Tray Assembly page.

The Enter Loaner Tray Information page appears.

3. Consider the following fields.

Company	Select the company where the tray exists that you want to use as a loaner.
Instrument Source	Select the instrument source for the tray that you want to use as a loaner. **NOTE** Although the instruments for a loaner tray may have come from a vendor, you must select the instrument source to group the loaner tray with other processes at the instrument source.
Assembly Location	Select the location where the tray you want to use as a loaner is assembled.
Tray ID	Enter the ID of the tray that you want to use as a loaner.

4. Click Enter.

   The Add Header Information for Loaner page appears.

5. Consider the following fields.

Tray List Name	Enter a descriptive name for the tray list.
Storage Location	Select the storage location where the tray is stored.
Sub-Location	Enter or select the name of the sub-location for the tray.
Tray List Ref.	Enter an alternate identification for the tray list.
Color	Select the type of color packaging or signifier used to distinguish the tray. This usually refers to the tape color on an instrument.
Sterilization	Select the sterilization type the tray receives after use.
Service	Select the department that the tray is associated with.
Header Note	Enter details of any special instructions on starting the tray assembly.
Footer Note	Enter details of any special instructions to finish the tray assembly.

6. Click Complete when you are finished adding header information.

   The system prints an assembly label, and an exception label if exceptions exist.

7. Click Done.

Reprinting Assemblies

Use this procedure to reprint assembly sheets, assembly labels, and exception labels.

Need More Details? Check out the following concepts:

- "What Is an Assembly ID?" on page 94

STEPS To reprint assemblies

1. Select Tray Assembly from the Surgical Instrument Management menu.
2. Select Reprint Assembly from the Tray Assembly page.

   The Enter Assembly to be Printed page appears.
3. Enter the assembly ID of the assembly that you want to reprint in the Assembly ID field.
4. Click Enter.

   The Print Assembly page appears.
5. Consider the following fields.

Assembly Sheet	Select this check box to print the tray list for the selected assembly.
Assembly Label	Select this check box to print the bar code label for the selected assembly.
Exception Label	Select this check box to print the bar code label of exceptions for the selected assembly.

6. Click Done to print the selected assembly items.

Chapter 6

Working with Sterilization

This chapter explains the concepts and procedures for using the sterilization module in the web application.

Concepts in This Chapter

TIP To skip directly to the procedures, see "Procedures in This Chapter" on page 111.

The following concepts provide background and conceptual information for the procedures within this chapter.

What Are Sterilization Loads?

Sterilization loads are groups of trays or assemblies that technicians transfer to sterilizer locations for processing. You can create sterilization loads either on the web application or the handheld application, and you can record sterilizer results on the web application.

Where Are Sterilizers and Processes Set Up?

Sterilizers and sterilization processes are set up using SIM Configuration.

Procedures in This Chapter

This section provides procedural guidance on creating, modifying, and canceling sterilization loads, and recording sterilization results.

Creating Sterilization Loads

Use this procedure to create sterilization loads on the web application.

Need More Details? Check out the following concepts:

- "What Are Sterilization Loads?" on page 110
- "Where Are Sterilizers and Processes Set Up?" on page 110

STEPS **To create sterilization loads**

1. Select Sterilization from the Surgical Instrument Management menu.
2. Select Load > Create on the Sterilization page.

   The Sterilization Load Header page appears.
3. Consider the following fields.

Company	Select the company where the sterilizer location is.
Sterilizer Location	Select the location of the sterilizer that you want to use.
Sterilizer	Select the sterilizer that you want to use.
Process	Select the sterilization process for the sterilizer that you want to use.
Cycle No.	Enter the cycle number this load corresponds to. The cycle number is an optional field that relates to the unique identifier that the sterilizer gives to a load.
Comments	Enter any comments or instruction for the load.

4. Click Continue.

   The Sterilization Load page appears.
5. Click Edit Header if you need to change information entered on the Sterilization Load Header page.
6. Select the Content tab.

7. In the ASID/BATCH ID field, enter assembly IDs or batch IDs to include in the sterilization load. Click Add.

   To remove an assembly or batch from the load, click Remove.

   NOTE If an assembly you enter is associated with a different sterilization type than the type you selected for the current load, a warning window appears.

8. Click Done when you have finished entering all the assemblies and batches that you want to include in the sterilization load.

   The Sterilization Load confirmation page appears.

9. Click OK.

Modifying Sterilization Loads

Use this procedure to modify sterilization loads on the web application.

Need More Details? Check out the following concepts:

- "What Are Sterilization Loads?" on page 110
- "Where Are Sterilizers and Processes Set Up?" on page 110

STEPS **To modify sterilization loads**

1. Select Sterilization from the Surgical Instrument Management menu.
2. Select Load > Modify on the Sterilization page.

   The Search for Sterilization Load to Modify page appears.

3. Consider the following fields.

Company	Select the company where the sterilizer location is.
Sterilizer Location	Select the sterilizer location of the load that you want to modify.
Sterilizer	Select the sterilizer for the load that you want to modify.
Cycle No.	Enter the cycle number this load corresponds to. The cycle number is an optional field that relates to the unique identifier that the sterilizer gives to a load.
Load ID	Enter the load ID for the load that you want to modify.
Process	Select the sterilization process for the sterilizer that you want to use.
User ID	Select the user ID for the technician who created the load that you want to modify.

ASID	Enter an assembly ID that is contained in the load that you want to modify.
Created Date – From Day	Enter or select a start date to search for a range of loads created on specific dates.
Created Date – To Day	Enter or select an end date to search for a range of loads created on specific dates.

4. Click Search to display the sterilization loads that fit your search criteria.

   The Select Sterilization Load to Modify page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

5. Click Modify in the row of the load that you want to modify.

   The Sterilization Load page appears with the Content tab showing.

6. In the ASID/BATCH ID field, enter assembly IDs or batch IDs to include in the sterilization load. Click Add.

   To remove an assembly or batch from the load, click Remove.

   NOTE If an assembly you enter is associated with a different sterilization type than the type you selected for the current load, a warning window appears.

7. Click Done when you have finished entering all the assemblies and batches that you want to include in the sterilization load.

   The Sterilization Load confirmation page appears.

8. Click OK.

Recording Sterilization Load Results

Use this procedure to record sterilization results on the web application.

Need More Details? Check out the following concepts:

- "What Are Sterilization Loads?" on page 110
- "Where Are Sterilizers and Processes Set Up?" on page 110

STEPS

To record sterilization load results

1. Select Sterilization from the Surgical Instrument Management menu.
2. Select Load > Results on the Sterilization page.

   The Search for Sterilization Load to Record Results page appears.

3. Consider the following fields.

Company	Select the company where the sterilizer location is.
Sterilizer Location	Select the sterilizer location of the load for which you want to record results.

Sterilizer	Select the sterilizer for the load for which you want to record results.
Cycle No.	Enter the cycle number this load corresponds to. The cycle number is an optional field that relates to the unique identifier that the sterilizer gives to a load.
Load ID	Enter the load ID for the load for which you want to record results.
Process	Select the sterilization process for the sterilizer for which you want to record results.
User ID	Select the user ID for the technician who created the load for which you want to record results.
ASID	Enter an assembly ID that is contained in the load for which you want to record results.
Created Date – From Day	Enter or select a start date to search for a range of loads created on specific dates.
Created Date – To Day	Enter or select an end date to search for a range of loads created on specific dates.

4. Click Search to display the sterilization loads that fit your search criteria.

   The Select Sterilization Load to Record Results page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

5. Click Record Results in the row of the sterilization load for which you want to record results.

   The Sterilization Load page appears with the Load Result tab showing.
6. Enter the results for the load.
7. Select the Content Results tab.
8. Enter the results for each batch or assembly.
9. Click Done.

   The Sterilization Load confirmation page appears.
10. Click OK.

View and Printing Sterilization Loads

Use this procedure to view and print sterilization loads on the web application.

Need More Details? Check out the following concepts:

- "What Are Sterilization Loads?" on page 110
- "Where Are Sterilizers and Processes Set Up?" on page 110

STEPS

To view and print sterilization loads

1. Select Sterilization from the Surgical Instrument Management menu.
2. Select Load > View/Print on the Sterilization page.

   The Search for Sterilization Load to View / Print page appears.

3. Consider the following fields.

Company	Select the company where the sterilizer location is.
Sterilizer Location	Select the sterilizer location of the load that you want to view or print.
Sterilizer	Select the sterilizer for the load that you want to view or print.
Cycle No.	Enter the cycle number the load that you want to view or print corresponds to. The cycle number is an optional field that relates to the unique identifier that the sterilizer gives to a load.
Load ID	Enter the load ID for the load that you want to view or print.
Process	Select the sterilization process of the sterilizer for the load that you want to view or print.
User ID	Select the user ID for the technician who created the load that you want to view or print.
ASID	Enter an assembly ID that is contained in the load that you want to view or print.
Created Date – From Day	Enter or select a start date to search for a range of loads created on specific dates.
Created Date – To Day	Enter or select an end date to search for a range of loads created on specific dates.

4. Click Search to display the sterilization loads that fit your search criteria.

   The Select Sterilization Load to View / Print page appears.
5. Click View/Print in the row of the sterilization load that you want to view or print.

   The Sterilization Load page appears with load results and content results.
6. Click Print to print the information on the page.
7. Click Done to return to the Sterilization page.

Canceling Sterilization Loads

Use this procedure to cancel sterilization loads on the web application.

Need More Details? Check out the following concepts:

- "What Are Sterilization Loads?" on page 110
- "Where Are Sterilizers and Processes Set Up?" on page 110

STEPS **To cancel sterilization loads**

1. Select Sterilization from the Surgical Instrument Management menu.
2. Select Load > Cancel on the Sterilization page.

The Search for Sterilization Load to Cancel page appears.

3. Consider the following fields.

Company	Select the company where the sterilizer location is.
Sterilizer Location	Select the sterilizer location of the load that you want to cancel.
Sterilizer	Select the sterilizer for the load that you want to cancel.
Cycle No.	Enter the cycle number the load that you want to cancel corresponds to. The cycle number is an optional field that relates to the unique identifier that the sterilizer gives to a load.
Load ID	Enter the load ID for the load that you want to cancel.
Process	Select the sterilization process of the sterilizer for the load that you want to cancel.
User ID	Select the user ID for the technician who created the load that you want to cancel.
ASID	Enter an assembly ID that is contained in the load that you want to cancel.
Created Date – From Day	Enter or select a start date to search for a range of loads created on specific dates.
Created Date – To Day	Enter or select an end date to search for a range of loads created on specific dates.

4. Click Search to display the sterilization loads that match your search criteria.

   The Select Sterilization Load to Cancel page appears.
5. Click Cancel in the row of the sterilization load that you want to cancel.
6. Click OK when the system prompts you to cancel the load.
7. Click Done to return to the Sterilization page.

Viewing and Printing Sterilization Process Definitions

Use this procedure to view or print sterilization process definitions.

STEPS To view and print sterilization process definitions

1. Select Sterilization from the Surgical Instrument Management menu.
2. Select View/Print Sterilization Process on the Sterilization page.

   The Search for Sterilization Process to View / Print page appears.
3. Consider the following fields.

Company	Select the company where the sterilizer location is.
Sterilizer Location	Select the location of the sterilizer.
Sterilizer	Select the name of the sterilizer.
Process	Select the sterilization process whose definition you want to view or print.
Type	Select the type of sterilization.

4. Click Search to display the sterilization processes that fit your search criteria.

   The Select Process to View / Print page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

5. Click View/Print in the row of the sterilization process that you want to view or print.

   The Sterilization Process Definition page appears.
6. Click Print to print the process information.

Chapter 7

Using the Handheld Application

This chapter explains the concepts and procedures for the handheld application of Surgical Instrument Management.

Concepts in This Chapter

TIP To skip directly to the procedures, see "Procedures in This Chapter" on page 121.

The following concepts provide background and conceptual information for the procedures within this chapter.

What Is a Handheld Terminal?

A handheld terminal (HHT) is a small, portable computer used to automate the decontamination, sterilization, and case cart picking procedures.

What Is Decontamination?

Decontamination is a process used to remove or reduce contamination by infectious organisms or other harmful substances after the tray is used in the operating room.

What Is Case Cart Picking?

Case cart picking is the process of selecting the surgical trays needed for a surgical procedure and placing them in a case cart.

What Is a Pick List?

A pick list is a list that contains the items needed for a surgical procedure.

Procedures in This Chapter

This section provides procedural guidance on using the handheld application to run decontamination and sterilization batch loads, perform case cart picking, and to transfer data from the handheld terminal to the Surgical Instrument Management system.

Launching the Handheld Application

Use this procedure to log in to the handheld terminal.

Need More Details? Check out the following concepts:

- "What Is a Handheld Terminal?" on page 120

STEPS

To access the Handheld program

1. To turn the device on, select a handheld device and press the power button. The Main menu appears.
2. Select Start > Lawson Mobile SCM or click the Lawson Mobile SCM icon.

   The Login page appears
3. On the Login page, enter your user ID and password.
4. Tap Login or press **Enter** on the handheld device to enter the Lawson Mobile SCM application.

   The Lawson Mobile SCM main menu appears.
5. Tap SIM to enter the Surgical Instrument Management application.

   The Lawson SIM main menu appears.

NOTE The password is case sensitive.

Transferring Carts to Decontamination

Use this procedure to select a created case cart and transfer it to a location for decontamination.

Need More Details? Check out the following concepts:

- "Launching the Handheld Application" on page 121

STEPS **To transfer carts to decontamination**

1. Log into the handheld application.
2. Select SIM from the Mobile SCM main menu.
3. Select Decontamination from the main menu.

   The Decontamination Location page appears.
4. Consider the following fields.

Company	Select the company where the decontamination location is.
Decontamination Location	Select the decontamination location.

5. Click Enter.

   The Enter Tray ID/CCID page appears.
6. Scan the case cart ID that you want to transfer to decontamination.

   The case card ID appears in the CCID field.
7. Scan the tray IDs included in the case cart.

   The tray IDs appear in the Tray ID list.
8. Click Done to record the case cart transfer to the decontamination location.

   The Decontamination Confirmation page appears.
9. Click OK to accept the decontamination information and return to the Main Menu.

Creating Batches

Use this procedure to create batches of trays and assemblies to transfer using the decontamination, sterilization, and transfer modes.

Need More Details? Check out the following concepts:

- "Launching the Handheld Application" on page 121

STEPS

To create batches

1. Log into the handheld application.
2. Select SIM from the Mobile SCM main menu.
3. Select Batch from the main menu.

   The Batch Enter ID page appears.
4. Scan the assembly IDs that you want to include in the batch or enter them in the Enter ID field and press **Enter**.

   The assemblies appears in the ASID list.
5. Click Create Enter.

   The Batch Confirmation page appears.
6. Click Print to print a bar code label for the batch.

   The Print page appears.
7. Select the label printer from which you want to print the bar code label for the batch from the Printer drop-down list.
8. Click Print.

Creating Sterilization Loads

Use this procedure to transfer batch loads of trays to sterilization locations.

Need More Details? Check out the following concepts:

- "Launching the Handheld Application" on page 121

STEPS To create sterilization loads

1. Log into the handheld application.
2. Select SIM from the Mobile SCM main menu.
3. Select Sterilization from the main menu.

   The Sterilization Load Header page appears.
4. Consider the following fields.

Company	Select the company where you want to process the sterilization load.
Sterilizer Location	Select the location in the company where you want to process the sterilization load.
Sterilizer	Select the sterilizer where you want to process the sterilization load.
Process	Select the process you want the sterilizer to use to process your sterilization load.
Cycle Number	Enter the sterilization cycle number this load corresponds to.

5. Click Enter.

   The Sterilization Setup/Content page appears showing the Setup tab.
6. View the setup information for the sterilizer and process and select the Content tab.
7. Click Edit Header if you need to change information entered on the Sterilization Load Header page.
8. Select the Content tab.
9. In the ASID/BATCH ID field, enter assembly IDs or batch IDs to include in the sterilization load. Click Enter.

   To remove an assembly enter again in the ASID/BATCH ID field.
10. Click Done when you have finished entering all the assemblies and batches that you want to include in the sterilization load.

    The Load Confirmation page appears.
11. Click OK to continue.

Transferring Instruments, Trays, and Carts

Use this procedure to transfer instruments, case carts, batches, or assemblies to a location.

Need More Details? Check out the following concepts:

- "Launching the Handheld Application" on page 121

NOTE You cannot transfer a cart to a sterilizer using the Transfer module.

STEPS

To transfer carts

1. Log into the handheld application.
2. Select SIM from the Mobile SCM main menu.
3. Select Transfer from the main menu.

   The Enter current location page appears.
4. Consider the following fields.

Company	Select the company where you want to transfer the cart.
Location	Select the location where you want to transfer the cart.

5. Click Enter.

   The Enter ASID page appears.
6. Enter an instrument ID, assembly ID, case cart ID, or batch ID in the Enter ID field.
7. Press **Enter** to add the assembly to the list to be transferred.
8. Continue entering assembly IDs that you want to transfer.
9. Click Done.

   The Transfer Confirmation page appears.
10. Click OK to return to the Main Menu.

Case Cart Picking

Use this procedure to create case carts and associate assembly IDs to case carts based on pick list requirements.

Need More Details? Check out the following concepts:

- "Launching the Handheld Application" on page 121
- "What Is Case Cart Picking?" on page 120
- "What Is a Pick List?" on page 120

STEPS

To pick case carts

1. Log into the handheld application.
2. Select SIM from the Mobile SCM main menu.
3. Select Case Cart Picking from the main menu.

   The Case Cart Picking page appears.
4. Consider the following fields.

Company	Select the company where you want to create the case cart.
Case Cart Picking Location	Select the location where you want to create the case cart.
Enter Picklist Number	Enter the pick list number for the case cart.
Patient ID	Enter the patient ID for who the case cart is used.

5. Click OK.

   The Case Cart ID page appears.
6. Consider the following fields.

Case Cart ID	Select the case card ID that you want to create the case cart for.
Enter CCID/ASID	Enter assembly IDs to associate with the case cart listed in the Case Cart ID field. To use a different case cart, enter the case cart ID in this field.

7. Press **Enter** to add the assemblies to the list.
8. Click Done to finish associating the case cart with the pick list.

   The Picking Confirmation page appears.
9. Click OK to return to the SIM main menu.

Chapter 8

Tracking Items

This chapter explains the concepts and procedures for tracking trays, case carts, and surgical instruments in the Surgical Instrument Management application. Reports include:

- Tray Tracking
- Case Cart Tracking
- Instrument Tracking

Concepts in This Chapter

TIP To skip directly to the procedures, see "Procedures in This Chapter" on page 129.

The following concepts provide background and conceptual information for the procedures within this chapter.

What Is a Case Cart?

A case cart is a metal rolling cart that contains all medical and surgical supplies and instruments needed for a surgical procedure.

Procedures in This Chapter

This section provides procedural guidance on using the web application to perform track tray information, case carts, and surgical instruments.

Running Tray Reports

Use this procedure to view location information for trays.

STEPS

To run the Tray Tracking report

1. Select Tracking from the Surgical Instrument Management menu.
2. Select Tray on the Tracking page.

   The Search for Tray for Tray Location page appears.
3. Consider the following fields.

Company	Select the company of the tray that you want to report on.
Location	Select the location of the tray that you want to report on.
Tray ID	Enter the ID of the tray that you want to report on.
ASID	Enter the assembly ID of the tray that you want to report on.
Item Number	Enter an item number included in the tray that you want to report on.
Tray List Number	Enter the tray list number of the tray that you want to report on.
Tray List Name	Enter the name of the tray list for the tray that you want to report on.
Service	Select the service associated with the tray that you want to report on.

4. Click Search to search for the trays that fit your search criteria.

   The Tray Location page appears.
5. Consider the following options.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

Search Again	Click this button to enter new search criteria.
Print	Click this button to print the selected report.
Export to Excel	Click this button to export the selected report to an Excel spreadsheet.

Running Case Cart Reports

Use this procedure to view location information for case carts.

STEPS **To run the Case Cart Tracking report**

1. Select Tracking from the Surgical Instrument Management menu.
2. Select Case Cart on the Tracking page.

   The Search for Case Cart Tracking Report page appears.
3. Consider the following fields.

Company	Select the company for the case cart from the drop-down list.
Location	Select the location of the case cart from the drop-down list.
Case Cart ID	Enter the identification number of the case cart.
User ID	Enter the identification of the user who transferred the case cart.

4. Click Search to display the case carts that fit your search criteria.

   The Cart Locations page appears.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

5. Consider the following options.

Search Again	Click this button to enter new search criteria.
Print	Click this button to print the selected report.
Export to Excel	Click this button to export the selected report to an Excel spreadsheet.

Tracking Instruments

Use this procedure to view location information for surgical instruments.

STEPS

To run the Instrument Tracking report

1. Select Tracking from the Surgical Instrument Management menu.
2. Select Instrument on the Tracking page.

   The Search for Instrument page appears.
3. Consider the following fields.

Company	Select the company containing the surgical instrument.
Instrument Source Loc.	Select the instrument source for the surgical instrument.
Item Group	Select the item group to which the instrument belongs.
Mfg. Name	Select the name of the manufacturer for the surgical instrument.
Mfg. Nbr.	Enter the number used by the manufacturer for the surgical instrument.
Item Number	Enter the item number associated with the surgical instrument.
Instrument ID	Enter the identifier associated with the surgical instrument.
SIM Description	Enter the description of the instrument as it appears in Procurement.
Local Description	Enter the description of the instrument as it appears in SIM.

4. Click Search to display the surgical instruments that fit your search criteria.

   The Select Instrument for Tracking Report page appears.
5. Click Select in the row of the instrument that you want to view.

   The Instrument Tracking Report page appears.
6. Click Search Results to return to the Tracking page.

NOTE For information about navigating search results, see "To navigate search results" on page 22.

Chapter 9

Running SIM Reports

This chapter explains how to run inventory, activity, and productivity reports for the Surgical Instrument Management application.

Running Activities Reports

Use these procedures to run reports on SIM activities. This procedure runs the following reports.

Report Name	Description
Case Cart History	Use this report to view a list of the activities that have occurred for the selected case cart.
Case Cart Picking Details	Use this report to view all picking activities performed for selected pick lists.
Infection Control Report	Use this report to view the current status of trays that were sterilized in the same loads with the trays used in a specified case cart pick.
Sterilization History	Use this report to view sterilization load history and its tray content.
Tray History	Use this report to view all the activities that have occurred for a tray within specified period.
Trays on Hold	Use this report to view all trays that currently have "On Hold" status.

STEPS **To run the Case Cart History report**

1. Select SIM Reports from the Surgical Instrument Management menu.

   The Reporting page appears.
2. Click Activities to display the list of reports, if it does not already appear.
3. Click Case Cart History.

   The Case Cart History Report Settings page appears.
4. Consider the following fields.

Case Cart ID	Enter the case cart ID that you want to view in the report.
Report Start Date	Enter or select a start date to include history information for the selected case cart during a specific date range.

End Date	Enter or select an end date to include history information for the selected case cart during a specific date range.

5. Click Run Report to generate the report.

   The Case Cart History report appears on the Lawson Report Viewer page.

STEPS **To run the Case Cart Picking Details report**

1. Select SIM Reports from the Surgical Instrument Management menu.

   The Reporting page appears.
2. Click Activities to display the list of reports, if it does not already appear.
3. Click Case Cart Picking Details.

   The Case Cart Picking Details Report Settings page appears.
4. Consider the following fields.

Company	Select the company for the case cart details that you want to view in the report.
Picking Location	Select the picking location for the case cart that you want to view in the report.
Patient ID	Select the patient ID for the item picked for the case cart that you want to view in the report.
Pick List ID	Enter a pick list ID associated with the case cart that you want to view in the report.
Case Cart ID	Enter the cart ID for the case cart that you want to view in the report.
ASID	Enter the tray assembly ID associated with the case cart that you want to view in the report.
Case Pick Start Date	Enter or select a start date to include picking events for the selected case carts during a specific date range.
End Date	Enter or select an end date to include picking events for the selected case carts during a specific date range.

5. Click Run Report to generate the report.

   The Case Cart Picking Details report appears on the Lawson Report Viewer page.

STEPS **To run the Infection Control by Sterilization Load report**

1. Select SIM Reports from the Surgical Instrument Management menu.

   The Reporting page appears.
2. Click Activities to display the list of reports, if it does not already appear.
3. Click Infection Control by Sterilization Load.

   The Infection Control by Sterilization Load Report Settings page appears.

4. Consider the following fields.

Company	Select the company of the sterilization load that you want to view in the report.
Pick List ID	Enter a pick list ID associated with the sterilization load that you want to view in the report.

5. Click Run Report to generate the report.

   The Infection Control by Sterilization Load report appears on the Lawson Report Viewer page.

STEPS To run the Sterilization History report

1. Select SIM Reports from the Surgical Instrument Management menu.

   The Reporting page appears.
2. Click Activities to display the list of reports, if it does not already appear.
3. Click Sterilization History.

   The Sterilization History Report Settings page appears.
4. Consider the following fields.

Company	Select the company of the sterilizer that you want to view in the report.
Sterilizer Location	Select the location of the sterilizer that you want to view in the report.
Sterilizers	Select the sterilizer that you want to view in the report.
Sort by	Select to sort the sterilization events by load ID or cycle number.
Report Start Date	Enter or select a start date to include events for the selected sterilizers during a specific date range.
End Date	Enter or select an end date to include events for the selected sterilizers during a specific date range.

5. Click Run Report to generate the report.

   The Sterilization History report appears on the Lawson Report Viewer page.

STEPS To run the Tray History report

1. Select SIM Reports from the Surgical Instrument Management menu.

   The Reporting page appears.
2. Click Activities to display the list of reports, if it does not already appear.
3. Click Trays History.

   The Tray History Report Settings page appears.

4. Consider the following fields.

Tray ID	Enter the tray ID to report on the history of a single tray.
Report Start Date	Enter or select a start date to include events for the selected tray during a specific date range.
End Date	Enter an end date to include events for the selected tray during a specific date range.

5. Click Run Report to generate the report.

   The Trays on Hold report appears on the Lawson Report Viewer page.

STEPS To run the Trays on Hold report

1. Select SIM Reports from the Surgical Instrument Management menu.

   The Reporting page appears.
2. Click Activities to display the list of reports, if it does not already appear.
3. Click Trays on Hold.

   The Trays on Hold Report Settings page appears.
4. Consider the following fields.

Company	Select the company of the trays on hold that you want to view in the report.
Instr. Source	Select the instrument source of the trays on hold that you want to view in the report.

5. Click Run Report to generate the report.

   The Trays on Hold report appears on the Lawson Report Viewer page.

Running Inventory Reports

Use these procedures to run reports on items and trays. This procedure runs the following reports.

Report Name	Description
Item Listing	Use this report to view a list of items managed at the selected instrument source location.
Tray Inventory by Location	Use this report to view a list of all trays for each location.
Tray List by Service	Use this report to view tray list revision and management information.
Tray List Comparison	Use this report to view a list of Items that are common and not common for selected tray lists.
Tray Operations by Service	Use this report to view operational metrics for tray lists.

STEPS To run the Item Listing report

1. Select SIM Reports from the Surgical Instrument Management menu.

   The Reporting page appears.
2. Click Inventory Management to display the list of reports, if it does not already appear.
3. Click Item Listing.

   The Item Listing Report Settings page appears.
4. Consider the following fields

Company	Select the company of the item that you want to view in the report. **NOTE** This is a required field.
Instr. Source	Select the instrument source location of the items that you want to view in the report. **NOTE** This is a required field.
Group by	Select Manufacturer to group the items in the report by manufacturer.
Sort by	Select to sort the items by item description, item ID, or manufacturer number.

5. Click Run Report to generate the report.

   The Item Listing report appears on the Lawson Report Viewer page.

STEPS To run the Tray Inventory by Location report

1. Select SIM Reports from the Surgical Instrument Management menu.

   The Reporting page appears.

2. Click Inventory Management to display the list of reports, if it does not already appear.
3. Click Tray Inventory by Location.

   The Tray Inventory by Location Report Settings page appears.
4. Consider the following fields.

Company	Select the company of the trays that you want to view in the report.
Location	Select the location of the trays that you want to view in the report.
Group by	Select Service to group the trays in the report by service.
Sort by	Select to sort the trays by sub-location or tray list.
Include List of Tray Lists for Each Location	Select this check box to include a list of tray lists for each location.
Include Empty Locations	Select this check box to include locations that have no trays in the report.
Identify Trays Sterilized More Than the Following No. of Days Ago	Enter a number of days to view trays sterilized more than the selected number of days.

5. Click Run Report to generate the report.

   The Tray Inventory by Location report appears on the Lawson Report Viewer page.

STEPS To run a Tray List by Service report

1. Select SIM Reports from the Surgical Instrument Management menu.

   The Reporting page appears.
2. Click Inventory Management to display the list of reports, if it does not already appear.
3. Click Tray Lists by Service.

   The Tray Lists by Service Report Settings page appears.
4. Consider the following fields.

TIP To search for all tray lists, leave the fields blank.

Company	Select the company of the tray list that you want to view in the report.
Instr. Source	Select the instrument source of the tray list that you want to view in the report.
Services	Select the service of the tray list that you want to view in the report.

5. Click Run Report to generate the report.

   The Tray Lists by Service report appears on the Lawson Report Viewer page.

STEPS To run the Tray List Comparison report

1. Select SIM Reports from the Surgical Instrument Management menu.

   The Reporting page appears.
2. Click Inventory Management to display the list of reports, if it does not already appear.
3. Click Tray List Comparison.

   The Tray List Comparison page appears.
4. Click Select.

   The Edit Tray List Selection popup window appears.
5. Consider the following fields.

Company	Select the company for the tray list.
Instr. Source	Select the instrument source of the tray list.
Tray List Description	Enter the description of the tray list.
Services	Select the service of the tray list.
Tray List ID	Enter the number of the tray list .

6. Click Search.

   The Edit Tray List Selection Search Results popup window appears.
7. Select the tray lists you would like to compare, and click Add.
8. Click OK on the Edit Tray List Selection Search Results popup window.

   The Tray List Comparison page appears with the selected tray lists listed.
9. Click Run Report to generate the report.

   The Tray List Comparison report appears on the Lawson Report Viewer page.

STEPS To run the Tray Operations by Service report

1. Select SIM Reports from the Surgical Instrument Management menu.

   The Reporting page appears.
2. Click Inventory Management to display the list of reports, if it does not already appear.
3. Click Tray Operations by Service.

   The Tray Operations by Service Report Settings page appears.

4. Consider the following fields.

Company	Select the company of the trays that you want to view in the report. **NOTE** This is a required field.
Instr. Source	Select the instrument source location of the trays that you want to view in the report. **NOTE** This is a required field.
Service	Select the services associated with the trays that you want to view in the report. **NOTE** This is a required field.
Include List of Trays for Each Service	Select this check box to include a list of trays for each service you selected.
Report Start Date	Enter or select a start date to include trays that were used by the service during a specific date range. **NOTE** This is a required field.
End Date	Enter an end date to include trays that were used by the service during a specific date range. **NOTE** This is a required field.

5. Click Run Report to generate the report.

   The Tray Operations by Service report appears on the Lawson Report Viewer page.

Running Productivity Reports

Use these procedures to run reports on activities performed by and on the productivity of a selected operator.

STEPS To run the Operator Activity report

1. Select SIM Reports from the Surgical Instrument Management menu.

   The Reporting page appears.
2. Click Productivity to display the list of reports, if it does not already appear.

3. Click Operator Activity.

   The Operator Activity Report Settings page appears.
4. Consider the following fields.

Operator	Select the operator that you want to view in the report.
Report Start Date	Enter or select a start date to include events for the selected operator during a specific date range.
End Date	Enter or select an end date to include events for the selected operator during a specific date range.

5. Click Run Report to generate the report.

   The Operator Activity report appears on the Lawson Report Viewer page.

STEPS To run the Productivity report

1. Select SIM Reports from the Surgical Instrument Management menu.

   The Reporting page appears.
2. Click Productivity to display the list of reports, if it does not already appear.
3. Click Productivity Report.

   The Productivity Report Settings page appears.
4. Consider the following fields.

Application	Select the application for which you want to view user productivity.
Operator	Select the operator that you want to view in the report.
Group By	Select to group report by operator or by activity.
Report Start Date	Enter or select a start date to include events for the selected operator during a specific date range.
End Date	Enter or select an end date to include events for the selected operator during a specific date range.

5. Click Run Report to generate the report.

   The Productivity report appears on the Lawson Report Viewer page.

Running Instruments Reports

Use these procedures to run reports on instruments. This procedure runs the following reports.

Report Name	Description
Instruments in Location	Use this report to view a list of instruments for a location, or several locations.
Instrument History	Use this report to view a list of the activities that have occurred for the selected instrument.

STEPS To run the Instrument in Location report

1. Select SIM Reports from the Surgical Instrument Management menu.

   The Reporting page appears.
2. Click Instruments to display the list of reports, if it does not already appear.
3. Click Instrument in Location.

   The Instrument in Location Report Settings page appears.
4. Consider the following fields.

Company	Select the company of the instruments that you want to view in the report.
Location	Select the location of the instruments that you want to view in the report.
Sort by	Select to sort the instruments by item ID, instrument ID, or status of instrument ID.
Show Active Instruments Only	Select this check box to only see active instruments.

5. Click Run Report to generate the report.

   The Instrument History report appears on the Lawson Report Viewer page.

STEPS To run the Instrument History report

1. Select SIM Reports from the Surgical Instrument Management menu.

   The Reporting page appears.
2. Click Instruments to display the list of reports, if it does not already appear.
3. Click Instrument History.

   The Instrument History Report Settings page appears.
4. Consider the following fields.

Instrument ID	Enter the instrument ID that you want to view in the report.
Report Start Date	Enter or select a start date to include history information for the selected instrument during a specific date range.

End Date	Enter or select an end date to include history information for the selected instrument during a specific date range.

5. Click Run Report to generate the report.

   The Instrument History report appears on the Lawson Report Viewer page.

Chapter 10

Transfer Using the Web Application

Transferring Instruments, Trays, Batches, and Carts

Use this procedure to transfer instruments, case carts, batches, or assemblies to a location using the web application interface.

Need More Details? Check out the following concepts:

- "Launching the Handheld Application" on page 121

STEPS **To transfer using the web application**

1. Select Transfer from the Surgical Instrument Management menu.

   The Transfer Destination Location page appears.

2. Consider the following fields.

Company	Select the company of the items you want to transfer.
Location	Select the location of the items you want to transfer.
Sub-Location ID	Select the sub-location where the tray is stored.
Location Bar Code	Enter the location ID of the location receiving the transfer.
Transfer to Default Location	Select to transfer trays and instruments to their default locations.

3. Click OK.

   The Enter Items for Transfer page appears.

4. Enter an instrument ID, assembly ID, case cart ID, or batch ID in the Item ID field.
5. Press **Enter** to add the ID to the list for transfer.

   – or –

   Scan an instrument ID, assembly ID, case cart ID, or batch ID in the Item ID field.

6. Continue entering or scanning IDs of the same ID type that was entered or scanned above.
7. To remove an ID from the list of scanned IDs for transfer, click Clear next to the appropriate ID.
8. Click Done.

Chapter 11

Running Global Reports

Running Productivity Reports

Use this procedure to run reports containing productivity statistics for a specified time period grouped by Activity or Operator.

STEPS **To run the Team Productivity report**

1. Select Global Reports from the Administration menu.

   The Global Reporting page appears.
2. Click Productivity to display the list of reports, if it does not already appear.
3. Click Productivity Report.

   The Productivity Report Settings page appears.
4. Consider the following fields.

Application	Select the application for which you want to view user productivity.
Operator	Select the operator that you want to view in the report.
Group By	Select to group report by operator or by activity.
Report Start Date	Enter or select a start date to include events for the selected operator during a specific date range.
End Date	Enter or select an end date to include events for the selected operator during a specific date range.

5. Click Run Report to generate the report.

   The Productivity report appears on the Lawson Report Viewer page.

Chapter 12

Configuring Surgical Instrument Management

Adding Case Carts

Use this procedure to add case carts to the Surgical Instrument Management application.

STEPS **To add case carts**

1. Select SIM Configuration in the Surgical Instrument Management menu.
2. Select Case Carts on the Configuration page.

   The Add Case Carts page appears.
3. Consider the following fields.

Start Company	Select the company for the case carts that you want to add.
Start Location	Select the location for the case carts that you want to add.
First Case Cart ID	Enter the number of the first case cart to be added. These numbers must be unique within the system.
Last Case Cart ID	Enter the number of the last case cart to be added. These numbers must be unique within the system.
Total Case Carts	The number of case carts to be added. This number is generated by the system.

4. Click OK.

Adding List Values

Use this procedure to add values for the Service, Sterilization, Color, or Group lists. These settings affect the values that appear in drop-down lists for tray lists, and categories for grouping items within trays.

STEPS **To add list values**

1. Select SIM Configuration in the Surgical Instrument Management menu.
2. Select List Values > Add on the Configuration page.

   The Add Collection Value page appears.
3. Consider the following fields.

Add Value	Enter the value that you want to add to the collection.
To	Select the collection to which you want to add the value.

4. Click Add.

   The Add Collection Value confirmation page appears.
5. Click OK.

Deleting List Values

Use this procedure to delete values for the Service, Sterilization, Color, or Group lists. These settings affect the values that appear in drop-down lists for tray lists, and categories for grouping items within trays.

STEPS **To delete list values**

1. Select SIM Configuration in the Surgical Instrument Management menu.
2. Select List Values > Delete on the Configuration page.

   The Delete Collection Value page appears.
3. Consider the following fields.

Delete From	Select the collection from which you want to delete the value.
Value	Select the value that you want to delete from the collection.

4. Click Add.

   The Delete Collection Value confirmation page appears.
5. Click OK.

Adding Parameter Names

Use this procedure to add sterilization parameter names.

Sterilization parameter names are used to define the settings for sterilization equipment. Sterilization parameter names are combined with result formats and sterilization units of measures to create sterilization parameters.

STEPS **To add parameter names**

1. Select SIM Configuration in the Surgical Instrument Management menu.
2. Select Sterilization> Values on the Configuration page.

   The Select Sterilization Value List page appears.
3. Click Parameter Names.

   The Parameter Names page appears.
4. Click New Parameter Name.
5. Enter the parameter name in the text box.
6. Click Save.

Removing Parameter Names

Use this procedure to remove sterilization parameter Names.

Sterilization parameter names are used to define the settings for sterilization equipment. Sterilization parameter names are combined with result formats and sterilization units of measures to create sterilization parameters.

STEPS **To remove parameter names**

1. Select SIM Configuration in the Surgical Instrument Management menu.
2. Select Sterilization> Values on the Configuration page.

   The Select Sterilization Value List page appears.
3. Click Parameter Names.

   The Parameter Names page appears.
4. Click the Remove icon next to the parameter name that you want to remove.

   The Remove Parameter Confirmation popup window appears.
5. Click Continue.

   The selected parameter is deleted.
6. Click Save.

Adding Test Names

Use this procedure to add sterilization test names.

Sterilization test names are used to used to define the tests that are utilized for various sterilization processes. Sterilization test names are combined with result formats and sterilization units of measures to create sterilization parameters.

STEPS **To add test names**

1. Select SIM Configuration in the Surgical Instrument Management menu.
2. Select Sterilization> Values on the Configuration page.

   The Select Sterilization Value List page appears.
3. Click Test Names.

   The Test Names page appears.
4. Click New Test Name.
5. Enter the test name in the text box.
6. Click Save.

Removing Test Names

Use this procedure to remove sterilization test names.

Sterilization test names are used to used to define the tests that are utilized for various sterilization processes. Sterilization test names are combined with result formats and sterilization units of measures to create sterilization parameters.

STEPS **To remove test names**

1. Select SIM Configuration in the Surgical Instrument Management menu.
2. Select Sterilization> Values on the Configuration page.

   The Select Sterilization Value List page appears.
3. Click Test Names.

   The Test Names page appears.
4. Click the Remove icon next to the test name that you want to remove.

   The Remove Test Confirmation popup window appears.
5. Click Continue.

   The selected test is deleted.
6. Click Save.

Adding Units of Measure for Parameter/Test Results

Use this procedure to add sterilization units of measure (UOM) for sterilization parameter results or sterilization test results.

Sterilization UOMs describe the types of input value the system should expect for test results.

STEPS To add units of measure for parameter/test results

1. Select SIM Configuration in the Surgical Instrument Management menu.
2. Select Sterilization> Values on the Configuration page.

   The Select Sterilization Value List page appears.
3. Click Units of Measure for Parameter/Test Results.

   The Units of Measure page appears.
4. Click New Unit of Measure.
5. Enter the unit of measure name in the text box.
6. Click Save.

Removing Units of Measure for Parameter/Test Results

Use this procedure to remove sterilization units of measure (UOM) for sterilization parameter results or sterilization test results.

Sterilization UOMs describe the types of input value the system should expect for test results.

STEPS To remove units of measure for parameter/test results

1. Select SIM Configuration in the Surgical Instrument Management menu.
2. Select Sterilization> Values on the Configuration page.

   The Select Sterilization Value List page appears.
3. Click Units of Measure for Parameter/Test Results.

   The Units of Measure page appears.
4. Click the Remove icon next to the unit of measure name that you want to remove.

   The Remove UOM Confirmation popup window appears.
5. Click Continue.

   The selected unit of measure is deleted.
6. Click Save.

Adding Sterilization Stages

Use this procedure to add sterilization stages.

Sterilization stages describe the steps in a sterilization process.

STEPS **To add sterilization stages**

1. Select SIM Configuration in the Surgical Instrument Management menu.
2. Select Sterilization> Values on the Configuration page.

   The Select Sterilization Value List page appears.
3. Click Sterilization Stages.

   The Sterilization Stages page appears.
4. Click New Stages.
5. Enter the sterilization stage name in the text box.
6. Click Save.

Removing Sterilization Stages

Use this procedure to remove sterilization stages.

Sterilization stages describe the steps in a sterilization process.

STEPS **To remove sterilization stages**

1. Select SIM Configuration in the Surgical Instrument Management menu.
2. Select Sterilization> Values on the Configuration page.

   The Select Sterilization Value List page appears.
3. Click Sterilization Stages.

   The Sterilization Stages page appears.
4. Click the Remove icon next to the sterilization stage name that you want to remove.

   The Remove Stage Confirmation popup window appears.
5. Click Continue.

   The selected sterilization stage is deleted.
6. Click Save.

Adding Sterilization Parameters/Tests

Use this procedure to add a sterilization parameter or sterilization test.

Sterilization parameters and sterilization tests are used as the building blocks when creating sterilization processes.

A Sterilization parameter is a union of a sterilization parameter name, result format, and sterilization UOM. A sterilization test is a union of a sterilization test name, result format, and sterilization UOM.

STEPS **To add sterilization parameters/tests**

1. Select SIM Configuration in the Surgical Instrument Management menu.
2. Select Sterilization> Parameters/Tests on the Configuration page.

   The Sterilization Parameters/Tests page appears.
3. Click New Parameter/Test.
4. Enter the parameter or test name in the text box.
5. Click Save.

Removing Sterilization Parameters/Tests

Use this procedure to remove a sterilization parameter or sterilization test.

Sterilization parameters and sterilization tests are used as the building blocks when creating sterilization processes.

A Sterilization parameter is a union of a sterilization parameter name, result format, and sterilization UOM. A sterilization test is a union of a sterilization test name, result format, and sterilization UOM.

STEPS **To remove sterilization parameters/tests**

1. Select SIM Configuration in the Surgical Instrument Management menu.
2. Select Sterilization> Parameters/Tests on the Configuration page.

   The Sterilization Parameters/Tests page appears.
3. Click the Remove icon next to the parameter or test name that you want to remove.

   The Remove Sterilization Parameters/Tests Confirmation popup window appears.
4. Click Continue.

   The selected parameter or test is deleted.
5. Click Save.

Adding Sterilization Processes

Use this procedure to add a sterilization process.

A sterilization process groups together sterilization parameters and/or sterilization tests in sterilization stages and defines specific settings and/or expected results for each sterilization parameter or sterilization test.

STEPS **To add sterilization processes**

1. Select SIM Configuration in the Surgical Instrument Management menu.
2. Select Sterilization> Processes on the Configuration page.

   The Sterilization Processes page appears.
3. Click New Sterilization Process.

   The Create New Sterilization Process page appears.
4. Enter the process description in the text box.
5. Select a sterilization type for the process.
6. Select to Require Cycle Number on load, if it is cycle number is required.
7. Select a stage and click Add Stage to add stage to process.
8. Click Add Parameter/Test to add parameters or tests for the stage added in previous step.
9. Add another sterilization parameter/test, if desired.
10. Add another sterilization stage, if desired.
11. Consider the following fields.

Expected Result	Displays the planned conclusion of the sterilization process.
Display at Load Setup	The display field to select for the process.
Comment	Displays any available supplementary information for the process.

12. Click OK to return to the Sterilization Process page

Adding Sterilization Equipment

Use this procedure to add each sterilization equipment used during sterilization.

STEPS

To add sterilization equipment

1. Select SIM Configuration in the Surgical Instrument Management menu.
2. Select Sterilization> Equipment on the Configuration page.

   The Sterilization Equipment page appears.
3. Click Configure New Sterilizer.

   The Configure New Sterilizer page appears.
4. Consider the following fields.

Sterilizer Description	Enter a description for the new sterilizer.
Company	Select the company to which you want to add the sterilizer.
Location	Select the location where the sterilizer is installed.
Sterilization Type	Select the type of sterilization the new sterilizer uses.
Assign Processes	Select desired processes and use the Assign >> button to assign them to the sterilizer.

5. Click OK to return to the Sterilization Equipment page.

Tray Assembly Configuration

Use this procedure to display the screen timer and to set the number of tray list columns to display on the count sheet.

STEPS

To configure tray assemblies

1. Select SIM Configuration in the Surgical Instrument Management menu.
2. Select Tray Assembly on the Configuration page.

   The Modify System Configuration Settings page appears.
3. Consider the following fields.

Display Screen Timer	Select Yes to display the screen timer that will monitor the time it takes to assemble a tray.
Number of Count Sheet Columns	Select the count sheet columns to use.

4. Click Modify.

   The Modify System Configuration Settings confirmation page appears.
5. Click OK.

Appendix A

Documentation Conventions and Support

Documentation Conventions

This document uses specific text conventions and visual elements.

Text Conventions

This	Represents
bold	A key name or function key name. For example, **Shift** is a key name and **Help (F1)** is a function key name. A value or command that you must type exactly as it appears. A program or file name.
italics	A manual title or form name. An emphasized word or phrase. A placeholder for a user-defined value or variable.

Visual Elements

STOP Information that you must know before you attempt the procedure or process.

IMPORTANT Important information that you must consider when you perform the procedure.

CAUTION Cautionary information about actions that involve a risk of possible damage to equipment, data, or software.

WARNING Warning information about actions that involve a risk of personal injury or irreversible destruction to the data or operating system.

Product Documentation

Lawson offers the following product documentation:

- Online help
- User guides and manuals
- Release notes and installation instructions

To find Lawson documentation, see the user interface or http://support.lawson.com. To obtain a login password and ID for the Support site, see your organization's Lawson contact or your Lawson client manager.

Global Support Center

Lawson Global Support Center (GSC) services are available to all Lawson customers who are on maintenance support for Lawson products. See the *Global Support Manual* for the following information:

- What information to gather before you contact the GSC
- How to contact the GSC
- How the GSC processes your request
- Which services are standard maintenance and which are billable

To find the *Global Support Manual*, see http://support.lawson.com. To obtain a login password and ID for the support web site, see your organization's Lawson contact or your Lawson client manager.

Documentation Contact

We welcome your questions or suggestions about Lawson documentation. Please send comments to documentation@lawson.com.

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