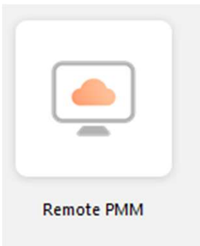
Accessing the PMM Desktop and Connecting a Scanner

Overview

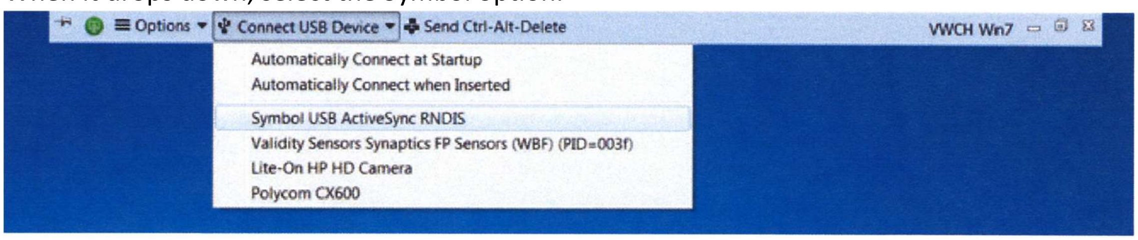
The Vanderbilt materials management team will access PMM through a virtual desktop. This technology requires a few additional steps to ensure the scanner is properly connected to the virtual desktop. This document assumes that Microsoft Mobile Device Center has been installed on a Windows 7 computer and the necessary drivers have already been installed.

1. If uploading or downloading data with the scanner, go ahead and place it in the cradle
2. Connect to the Virtual Desktop using the VMWare Horizon Client
   a. Connect to the server "Virtual.vumc.org", by clicking on the VMWare Horizon Client icon. If you do no t see the Icon, click on "New Server" and type it the name.

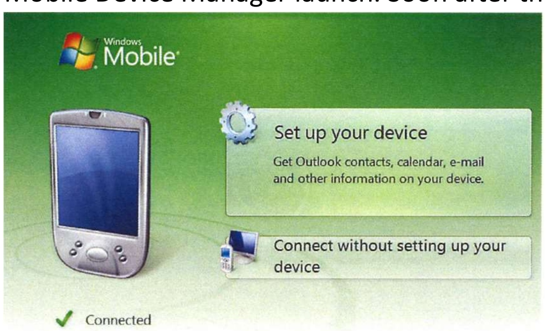
   b. When prompted, enter your VUMC ID and ePassword.
   c. Once authenticated, double click on the "Remote PMM" icon to connect to the virtual desktop.



   d. You should now be logged into the Windows 7 virtual desktop. You must now tell the virtual desktop to connect to your scanner.
   e. Hover your mouse along the top of the screen in the middle. This will cause the menu to drop down an. When it drops down, select the Symbol option.



   f. Upon doing so, the machine may start to install drivers. Once drivers are complete, you should see the Mobile Device Manager launch. Soon after the scanner will be connected.



Allscripts Supply Chain Solutions (PMM) PAR Level Scanning

Download forms to a handheld device

To download par level or asset par level forms to a handheld device,

1. Plug the serial cable of the handheld device into a serial port on the Supply Chain Solutions workstation.
2. From the **Forms** tab of the Par Level Management window, select the forms you want to download.
3. Right-click the selected forms and select **Download To Hand Held** from the shortcut menu.

   The selected forms are automatically transferred to the Par Level Forms folder of your handheld device and saved with the .frm file extension.
4. Confirm system download messages as explained here...

If the form...	**Then...**
already exists on the handheld device	click **OK**. The downloaded form overwrites the form on the handheld device.
was not downloaded because Form Viewer is not installed or is installed in the wrong folder	click **OK**, install the Form Viewer in the My Handheld PC folder on the workstation (My Pocket PC folder for older operating systems), and repeat the download procedure.

For information in installing the Form Viewer, see the Supply Chain Solutions Installation Guide .

Enter par counts on a handheld device

To enter par counts on a handheld device,

1. In the Par Level Forms application, double-tap the par level or asset par level form you want to open.

You can open Uncounted, Counted, and Finished forms.

The first item on the form is displayed. You can view the selected item's information by tapping **Detail**.

2. Tap the current quantity of the item in Inventory Count and scroll up.

The next item on the form is displayed.

If you are using the Symbol handheld, you can skip to a specific item on the form by scrolling up or down and scan the item's bar code.

3. Repeat step 2 until all items on the form are counted.
4. Save the form as explained here...

If you want to...	**Then...**
save an incomplete form that is **not** ready to be uploaded to Supply Chain Solutions	1. Tap Save on the handheld when counting is complete. The Save as Type dialog box is displayed. 2. Tap **Counted**. 3. Tap **OK**. The form is saved as Counted in the Par Level Forms folder.
save a counted form that is ready to be uploaded to Supply Chain Solutions	1. Tap Save on the handheld when counting is complete. The Save as Type dialog box is displayed. 2. Tap **Ready to Upload**. 3. Tap **OK**. The form is saved as Finished in the Par Level Forms folder, but can still be opened.

Upload par counts from a handheld device

To upload par level or asset par level forms using a direct serial connection,

1. With the Mobile Devices function running on the workstation, open Par Level Management.
2. Insert the handheld device into its docking station at the workstation.

The workstation and handheld device display connection messages. All files with the .fru extension are automatically uploaded.

To upload forms using a remote dial-up connection,

1. From the handheld device's FormViewer application, tap **Dial Up**.

   A list of pre-installed remote connections is displayed in the Dial dialog box.
2. Select a connection and tap **OK**.
3. In the Password dialog box, type a valid password for the connection you have chosen and press **Enter**.

For each par item count uploaded, Supply Chain Solutions subtracts Inventory Count from Par Level Count. If the difference is greater than zero, Supply Chain Solutions automatically submits a par level or asset par level requisition.

Allscripts Supply Chain Solutions (PMM) Inventory Management Scanning

Create a count sheet

To create a count sheet,

1. From the **Inventory Control** tab of the Inventory Management window, double-click **New Count Sheet Wizard**.
2. In Step 1 of the Physical Inventory Count Sheet Wizard, select a Count Sheet Generation Method.
3. If **Random** is selected, type the Number of Items to include on the count sheet.

    Note: If you have CreateCountSheet and EditAdminAdjustments security access, you can Reset Random Cycle Count Settings on the **Inventory Control** tab of Inventory Management. This allows items selected at random for a previous count to be selected again for a new count.

4. If Highest-Moving is selected, select to Generate By **Quantity** or **Dollar Amount**, specify the number of days in the Period, and type the Number of Items to include on the count sheet.
5. Select whether to **Include All Items**, **Exclude Reusable Items**, or to **Include Only Reusable Items**, and then click **Next**.
6. In Step 2 of the Wizard, so that you can select items more easily, select to Group By **Bin Location**, **Commodity Code**, **Item Description**, **Item Number**, **Manufacturer**, or **Vendor**.
7. Expand the tree and click to deselect the items you do not want on the count sheet, and then click **Next**.

    Tip: If you selected Random or Highest-Moving, you can click **Add Item** to search for other items to add to the count sheet.

8. In Step 3 of the Wizard, type a unique Count Name for this inventory count sheet group, type the Number of Counters involved in the inventory count.
9. Select each counter's count sheet and assign items to it from the Available list. Click **Next** when you are finished.
10. In Step 4 of the Wizard, review each counter's count sheet and click **Print** to print it or **Download to Device** to download it to a handheld device.

    Tip: You can use the **Print Preview** function to preview one or more printed count sheets.

11. Click **Finish** when all count sheets are printed or downloaded.

    The count sheet is displayed on the **Inventory Control** tab.

Download a count sheet

To download an inventory count sheet to a handheld device,

1. Make sure the handheld device is resting in its cradle attached to the workstation.
2. Locate the count sheet on the **Inventory Control** tab of Inventory Management.
3. Right-click the count sheet and select **Download to Device**.

   The count sheet is downloaded to the handheld device.

   Note: You can also download a new count sheet to a handheld device as part of the count sheet creation process.

   Tip: You can download more than one count sheet to the same handheld device at the same time.

Perform a handheld inventory count

Before you count inventory...

- receive all replenishments into inventory,
- process all pending requests from other supply locations,
- credit returns to the supply location, and
- turn off Issue Processing.

Tip: To open the handheld inventory count program, double-click ItemCount.exe on the handheld device.

To perform an inventory count with a handheld device,

1. From the Select Count Sheet page, select the New or Partial status count sheet you want to use and tap **OK**. Type your user name and tap **OK**.
2. On the Item Count page, count each item and enter your counts in Issue UM and Order UM.
3. When you are finished entering counts, tap Save on the toolbar.

   The Select Count Sheet page is displayed.

   If all items on the sheet have a count entered, the count sheet status is set to Ready to Upload. If some but not all items on the sheet have a count entered, the count sheet status is set to Partial. If no items on the sheet have a count entered, the count sheet status is set to New.

Review count data

To review an inventory count,

1. From the **Inventory Control** tab of Inventory Management, double-click **Review Count Sheets**.
2. In the Select Count Sheets dialog box, select the Count Name and then the Count Sheets to be reviewed and click **OK**.

   Note: You can only select count sheets with the status Uploaded, Ready to Review, Review in Process, or Reviewed. After you start to review a count sheet, the counter can no longer access it. Changes must be made by the reviewer.

3. In the Count Sheet Review dialog box, under Inventory Data Summary, review the count sheet data item by item, comparing Count to Inventory (on-hand).

If you want to...	Then...
request a recount of one or more items	1. Click to select **Recount** at the end of the selected item's row. 2. Click Generate Recount Sheet **Generate** on the ribbon bar. The Physical Inventory Count Sheet Wizard - Step 4 is displayed. 3. Click **Print** to print the selected recount sheet to the default printer. 4. Click **Download to Device** to download the selected recount sheet to the handheld device attached to the workstation. 5. When you are done, click **Finish**. The recount sheet is saved on the Inventory Control tab.
override the count sheet's count of the item	With the item row selected, under Item Count Sheet Data, type the Override count for the Issue UM Count or the Override count for the Order UM Count.
add additional count sheets or recount sheets from this same count to the review	1. Click  on the ribbon bar. The Select Count Sheets dialog box is displayed. 2. Select the count sheets or recount sheets to add to the review and click **OK**.

4. If you are finished reviewing count sheet data but you are not ready to update inventory (for example, not all sheets in the count are ready), click  **Save** on the ribbon bar to save the reviewed sheets with a Review in Process status.
5. When all sheets in the count have been added and reviewed and all discrepancies are resolved, select all the sheets in the count and click Submit on the ribbon bar to update inventory counts.

   Note: You must select all the sheets in the count in order to activate Submit.

   Reviewed inventory counts replace Supply Chain Solutions' on-hand quantities, and the count sheets are saved with a Reviewed status.

Tip: You can review the counts entered on the Physical Inventory Count Sheet by selecting **Report** on the ribbon bar.

Upload handheld count data

To upload inventory count data from a handheld device,

Place the handheld device in its cradle attached to a Supply Chain Solutions workstation that has Inventory Management running.

The handheld device synchronizes with the workstation and begins to upload data from all count sheets with the status Ready to Upload.

The progress of the upload is displayed in a dialog box in front of the Inventory Management application on the workstation.

After uploading, the status of the count sheet on both the workstation and the handheld device is changed to Uploaded, and you are prompted to delete the uploaded count sheet from the handheld device.

Deactivate a count sheet

Use these instructions to deactivate a count sheet.

Deactivate an inventory count sheet...

1. Locate the count sheet on the **Inventory Control** tab of Inventory Management.
2. Right-click the count sheet and select **Inactivate**.

   The system prompts you to confirm your actions.
3. Click **OK**.

The count sheet status is set to Inactive.

Reactivate a deactivated inventory count sheet...

1. Locate the inactive count sheet on the **Inventory Control** tab of Inventory Management.
2. Right-click the count sheet and select **Reactivate**.

   The system prompts you to confirm your actions.
3. Click **OK**.

The count sheet status is set to Active.

Delete a count sheet

Use these instructions to delete a count sheet.

Delete an inventory count sheet in Inventory Management...

1. Locate the count sheet on the **Inventory Control** tab of Inventory Management.
2. Right-click the count sheet and select **Delete**.

   The system prompts you to confirm your actions.
3. Click **OK**.

The count sheet is removed from the Inventory Control tab.

Delete an inventory count sheet from a handheld device...

1. Select the count sheet on the Select Count Sheet page.
2. Tap **Delete**.

   The system prompts you to confirm your actions.
3. Tap **Yes**.

The count sheet is removed from the Select Count Sheet page.

Delete all sheets in a count group in Inventory Management...

1. From the **Inventory Control** tab of the Inventory Management window, double-click **Clear/Delete Count Sheets**.

   The Clear/Delete Count Sheets dialog box is displayed.
2. Select the **Count** group name and click **Delete**.

   The system prompts you to confirm your actions.
3. Click **OK**.

The count sheets in the selected count group are deleted.