Equipment Loans Online Ordering Guide

Version 10.0

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CONTENTS

INTRODUCTION 3

ON-LINE ACCESS 4

Before you log on 4

Logging on 4

E-Learning 6

On-line Help 6

Using the System 6

Finding a stock item 7

Finding a client 9

Adding a Client 11

Printing Details 12

Displaying Current Orders 12

Adding a Delivery Order 13

Confirming Items for Delivery 14

Entering Booking Details 14

Adding a Collection Order 15

Rescheduling a Booking 16

Reviewing an Item 16

Authorising Orders 16

Attaching External Documents and Emailing 17

Registering as a new user On-line 19

Requesting a new password On-line 20

Running Reports 20

Links to other Web Pages 20

Logging Off 20

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INTRODUCTION

This guide is intended to provide information on the use of the On-line Access Module within Elms2. This web based application aims to allow referrers to enter their own orders on-line for delivery and collection, and to query progress of those orders or the history of equipment ordered for a specific client. It also allows access to up-to-date stock information and submission of reports on orders which have been placed.

The On-line Access Module may also be used by service engineers to look at and update details of services/repairs carried out on identifiers, parts fitted, and faults relating to the equipment – this is covered in a separate guide.

In addition, the On-line Access Module can be used to manage clinics and fill in assessment forms – this is covered in a separate guide.

Please note – screens shown here may vary in detail from the current on-line version of the system.

A sample flowchart is included at the end of this guide showing the processes involved in adding referrals using the on-line access module, as relates to one particular store currently using the system.

ON-LINE ACCESS

Before you log on

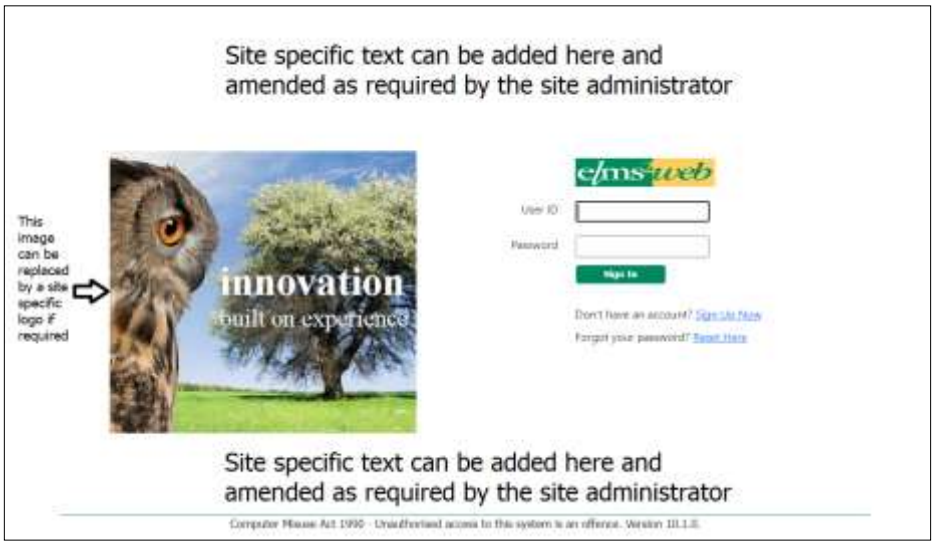
The system administrator will have set you up in one of the following ways. In both cases an initial password will be set for you and you will use this the first time you login.

As a referrer – you will login with your staff PIN code and be restricted to access to specific stores. You will be able to log in as a referrer using a base and budgetholder for which you have a valid referrer record.

As a core Elms2 user – you will login with your normal Elms2 User ID and will be able to look at any base and budgetholder for any store for which you have been granted access.

Logging on

Use the User ID and password allocated to you. Click on the Sign In button and your User ID and password will be validated.



You will then have the opportunity to confirm personal details. The first time you log on to the on-line access module you will also have to type in a new password (in both boxes).

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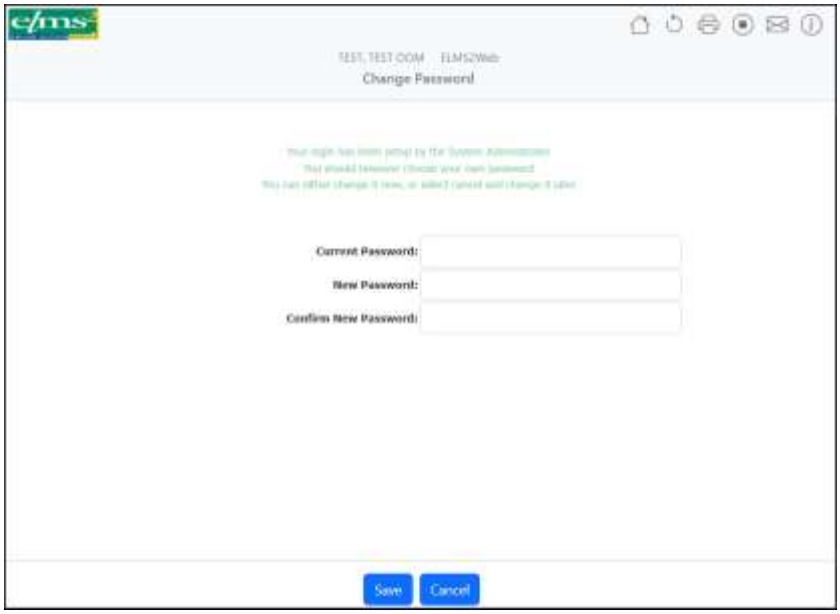
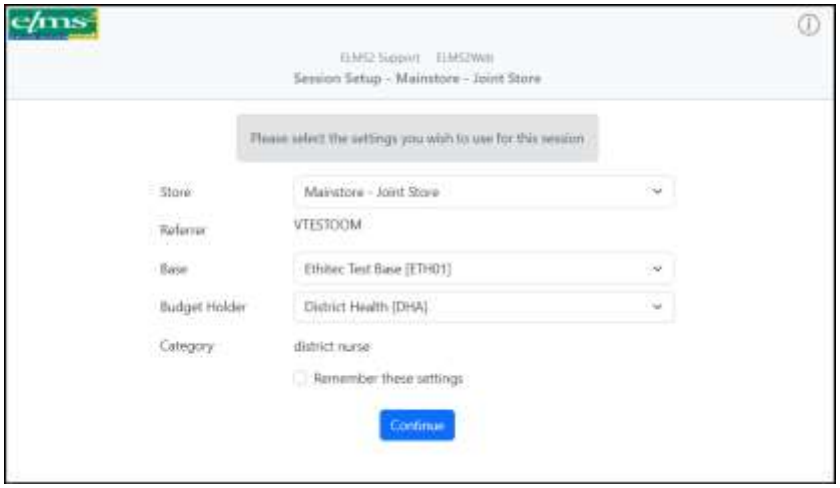


Click on update to save the new password or any changes, and click on continue when you are ready to go to the next screen. If you are logging in again a short time after logging out, you will be able to continue the previous session by leaving the bottom box toggled. Elms2 will know what client you were working with previously before you logged out.

Your next screen will set up your referrer details for the session – which store, staff code, base and budgetholder code will be used on any orders you place or reports you run. You can change these if you have more than one active referrer record set up for you, or have access to stock from more than one store. The blue typeface indicates a pick list is available – click on the label in blue to bring up this list.

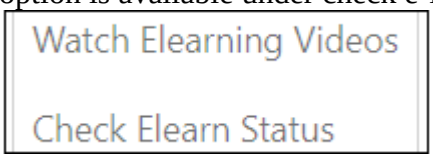
The first time you log in, the settings may be blank and you will have to select from the pick list. Toggle on ‘Remember these settings’ once you have chosen store, base and budgetholder so you don’t need to enter them again.



Please note – if too much time elapses without a keystroke while using the system you will be required to log in again.

E-Learning

If it is mandatory that you watch e-learning videos before using the system, and you have not yet done so, these will appear following successful login. You can toggle to self-certify that you have watched the clip(s). You can check to see what you have watched; re-watch the clips; print a certificate to show what you have watched – use the menu under Utilities (the certificate option is available under check e-learn status).



On-line Help

There is on-line help available – click on the ‘i’ symbol at the top right corner of the window. This will give you information on how to use the system and will initially take you to information concerning the screen you are on.

Using the System

You can now choose what course of action to follow by clicking on one of the tab folders at the top of the screen.

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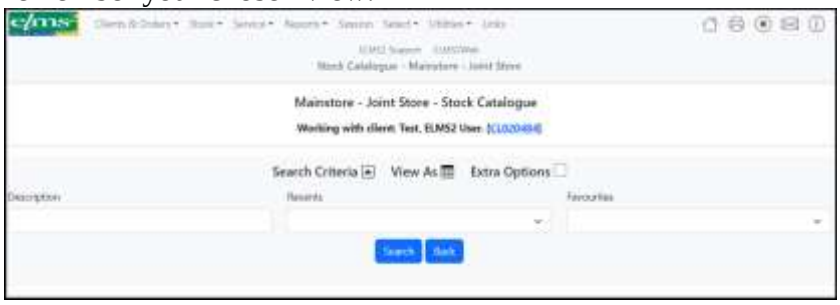
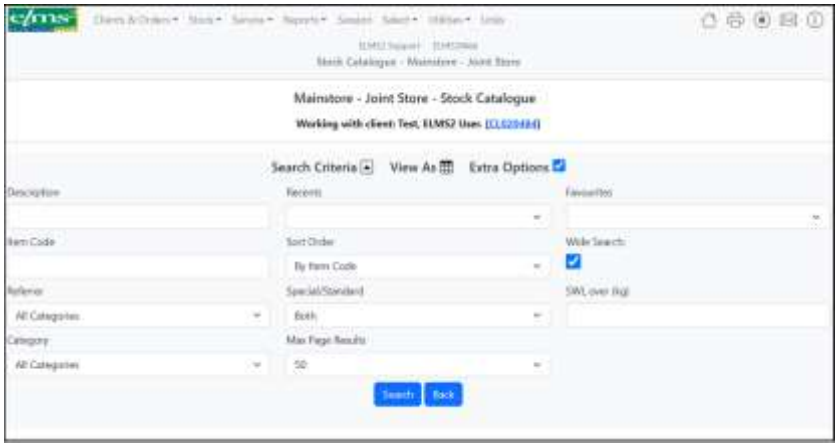
Finding a stock item

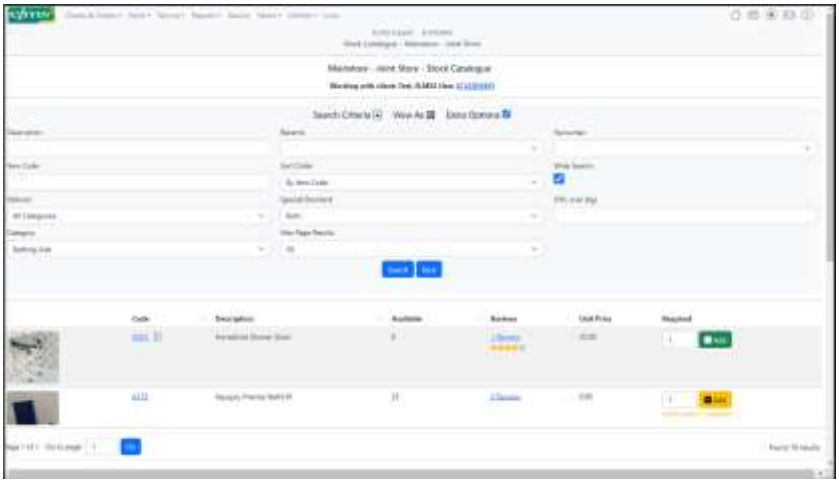
Click on the stock tab folder. Enter some search criteria and click on the Search button. Any stock items matching your selection criteria will be displayed; if too many match, only a few are shown at once and you can click on Next to see the next screenful. The item code will be underlined – click on the item code to see the catalogue details (and possibly images and documentation) for this item.

The initial stock search screen is a simple screen – using a wide search on description matches (there is no need to add wild cards), and with recent and favourites drop down lists. To see the full range of search criteria toggle on ‘extra options’.

The items displayed may be in ‘grid’ view or ‘list’ view. This can be changed by toggling on ‘extra options’ (if not already displayed) and changing the View As. The system will remember your chosen view.







Click on Add to Basket (to the right of the stock row in the table displayed) and you will have this stock item pre-selected ready for placing on a delivery order for a client.

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For some items there may be additional optional items associated with the selected item – in which case the button will be labelled Options, clicking this will a popup a screen

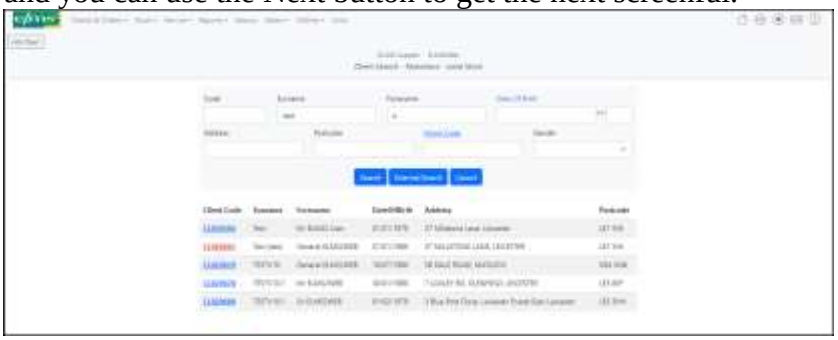
Displaying the optional items as below:

The popup (shown above) allows you to enter the desired quantity of each optional item to be added to basket.

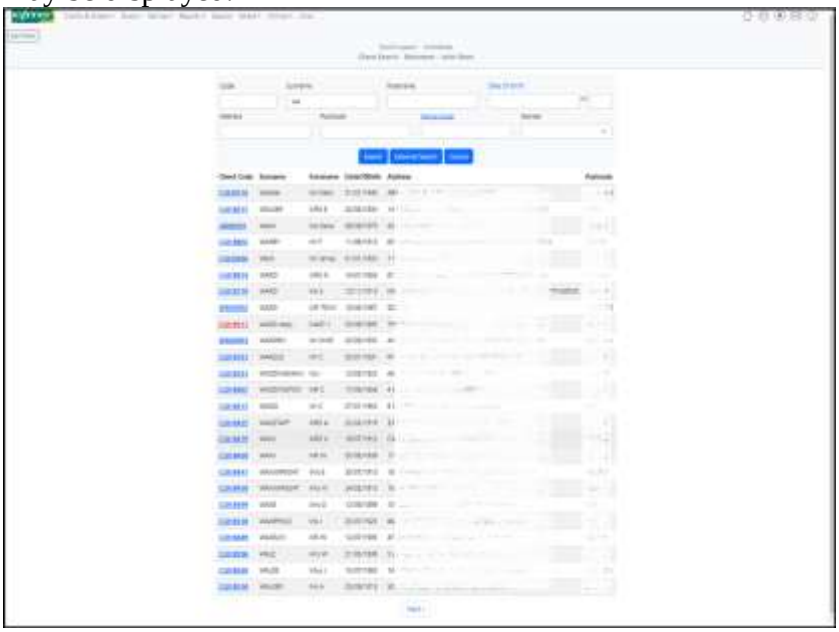
Finding a client

Enter some search criteria – such as first few letters of surname. This should over-type the asterisk i.e. once you type in a field, you do not want the asterisk to remain in the field. As an example, for surname, this should look like ‘brook’ not ‘brook*’. You may enter more than one search criteria e.g. surname and NHS code, or surname and a specific word from the address (this does not have to be what the address begins with but should not be too general like ‘road’ or ‘street’).

Click on Search to display clients matching the criteria. If too many clients are found, they will be displayed a few at a time and you can use the Next button to get the next screenful.



Click on the blue typeface to the left of the client to see details for the client. These details may then be updated, or client orders may be displayed.



Click on the Client Orders tab to see orders for the selected client; click on the Client Move to record the client has changed address or moved into a residential/nursing home. Click on Other Addresses to see previous or alternative delivery addresses for this client.

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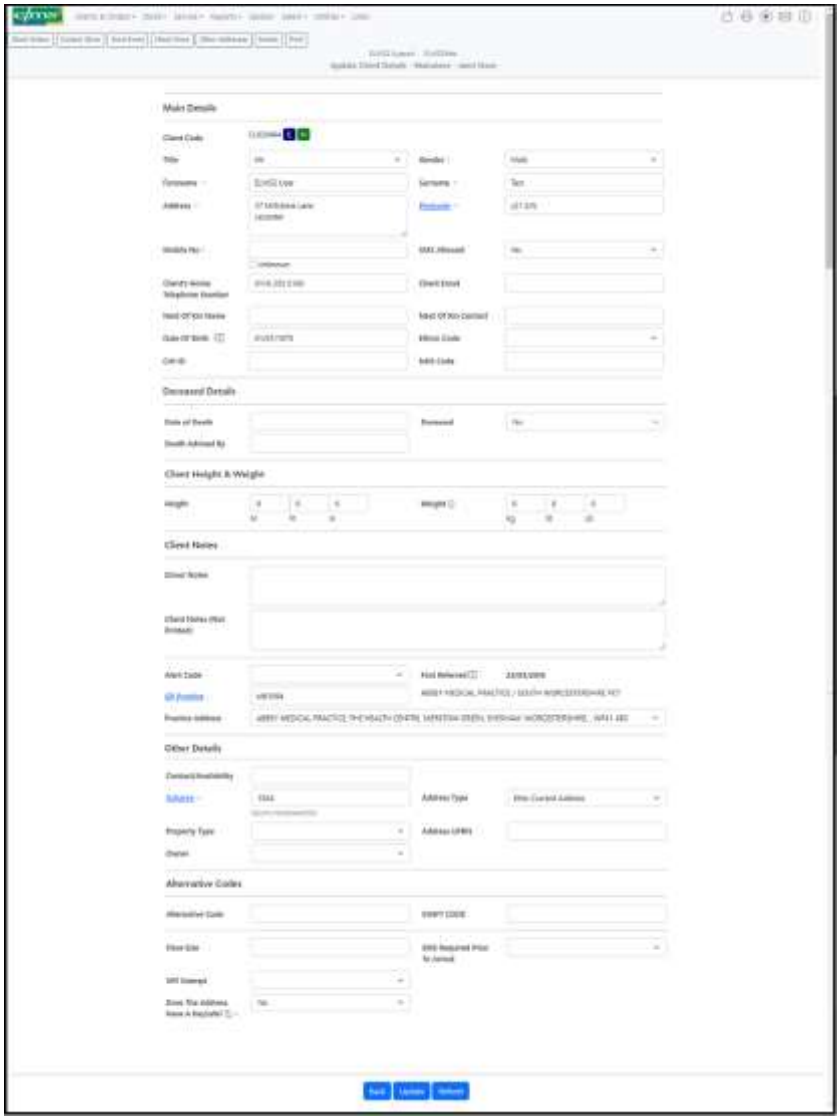


Adding a Client

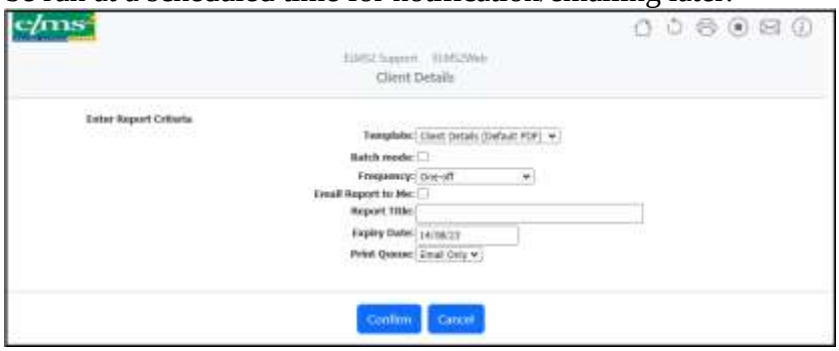
If the client you were searching for is not on the system, use the Add Client tab from the Client Search results screen. Firstly, you will be able to choose a residential/nursing home from a pick list if this is applicable for this client. If not, you may have Quick Address set up to enable you to quickly and accurately enter address details. Use the on-line help for more details on adding new clients to the system.

Once client details have been entered, click on Update to store them in the database. If any errors occurred e.g. mandatory data was not filled in, you will see these fields in red and have an opportunity to re-enter the data.

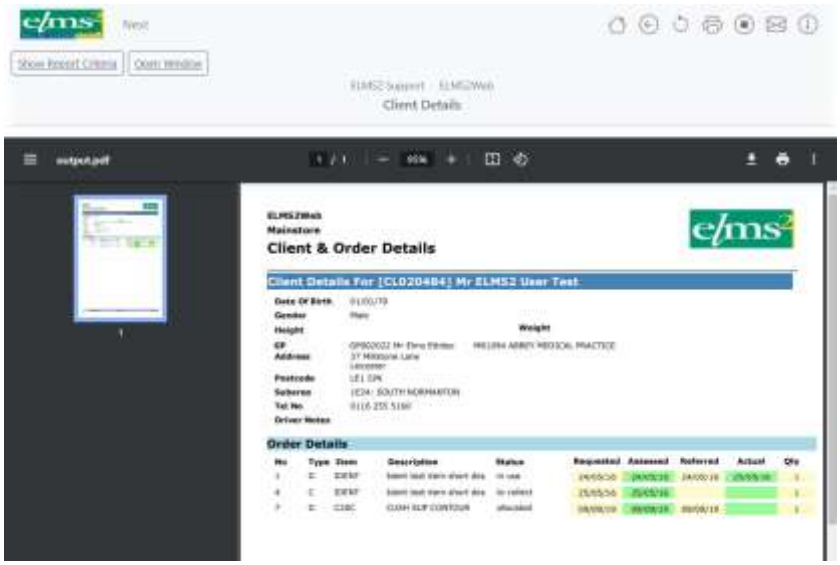
Printing Details

If you wish to print off details of the client perhaps with details of their current orders, or labels for file, there are various PDF layout options available under a Print button that may be enabled if you have rights to run off these reports. If you do not have this option please speak to your system administrator.

Choose a template from the drop down; do not toggle on any other options or the PDF will not immediately generate but will be run at a scheduled time for notification/emailing later.



When the PDF has generated on screen, use the Print icon (top right in shot below) and then Next option (top left) to return to the client screen.



Displaying Current Orders

Choose the Client Orders tab from the Client Details screen. Enter selection criteria if specific orders other than current orders are to be displayed. Click on the item code (blue typeface) to see catalogue details of the item, click on the order number (blue typeface) to see further details of the order – referrer, when delivered, priority, notes etc.

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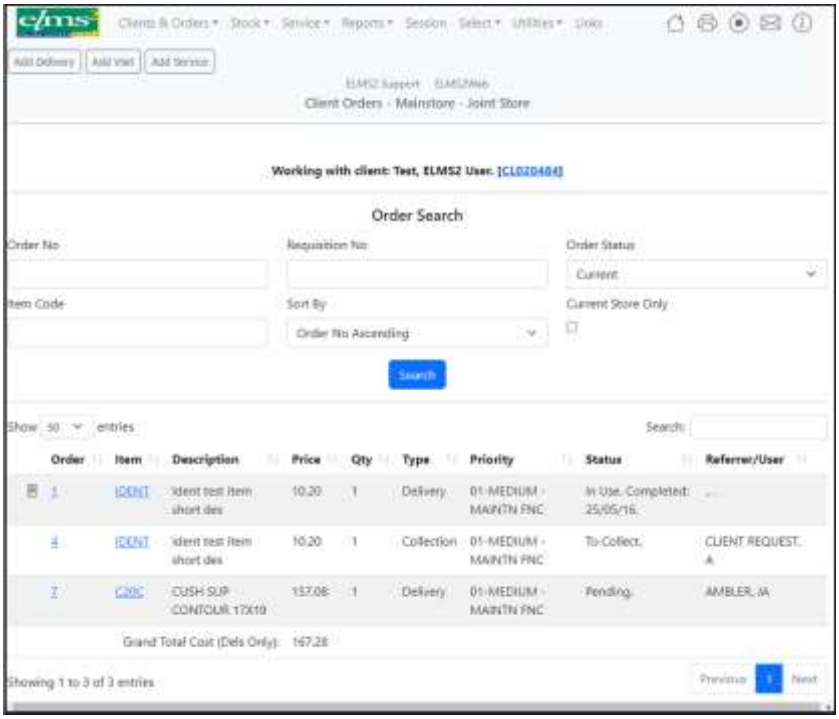
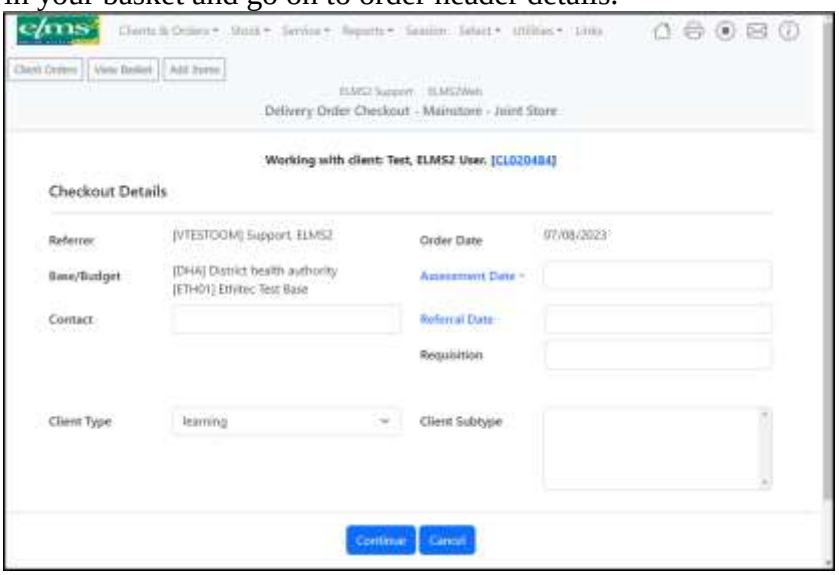


Adding a Delivery Order

If you have already selected stock, clicking on Add Delivery will take you to the order header details screen to confirm/enter details such as assessment date, contact, requisition ID. If you have not selected stock, you will be taken to the stock screen to Add Items to Basket, then choose Checkout to accept the items in your basket and go on to order header details.

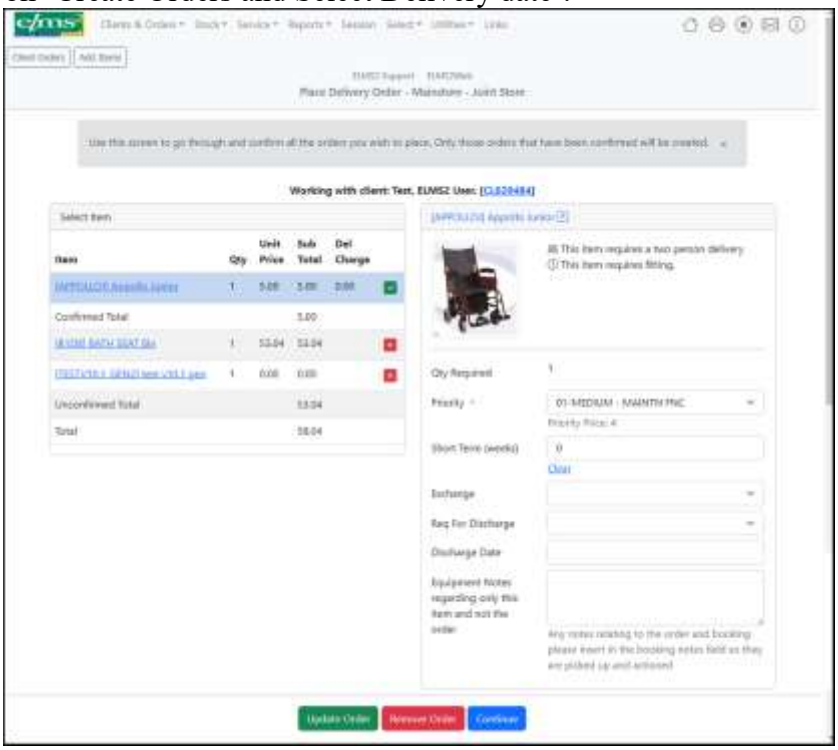


Click on continue to confirm the chosen stock and from there to book a journey if the system setup allows this.

Confirming Items for Delivery

The chosen items will appear in a list on the left of the screen. Elms2 will create an order for each of these if the item is confirmed and all checks are met (such as height and weight restrictions). When you click on one of these, the details for that order will be shown on the right hand side. These details may be filled in with more information such as priority and notes.

Click on Confirm when you are happy with the details entered and if all checks are met, the item will show on the left hand side of the screen as confirmed. When all orders are confirmed, click on ‘Create Orders and Select Delivery date’.



Entering Booking Details

If there are existing bookings, you may be able to include these orders with those. Existing bookings will show in a list and you can add to a booking, create a new booking, hold or cancel. To add to an existing booking, use the select button under the appropriate booking ID.

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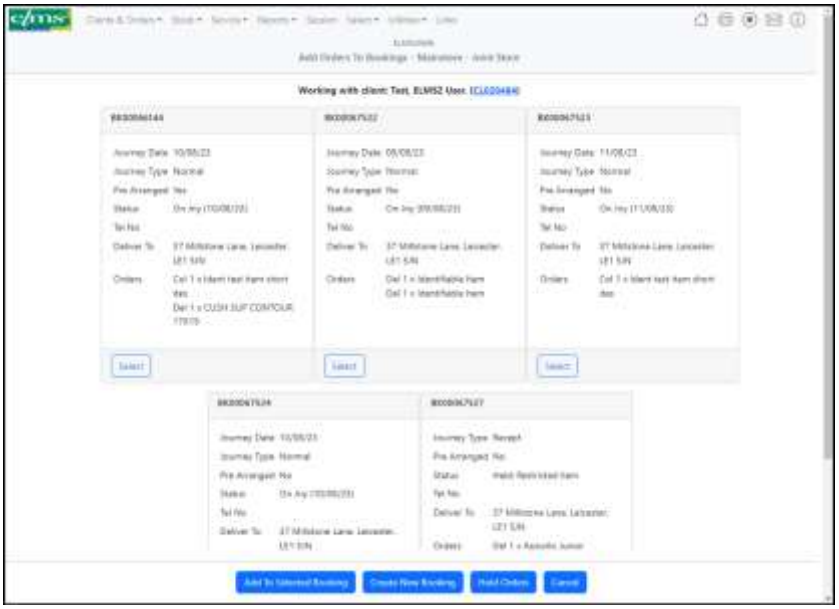
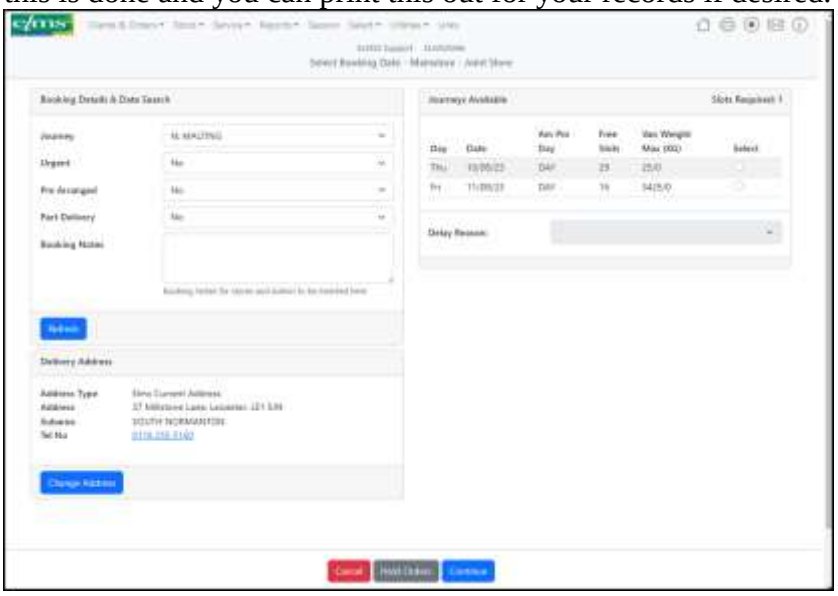
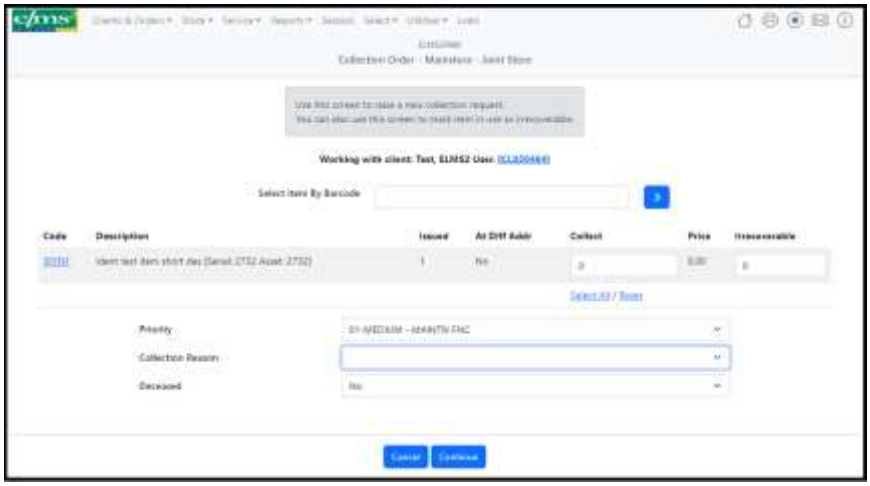


If you choose to create a new booking, you can enter details of the booking and if permissions allow, choose a journey date. You will be presented with a booking confirmation screen once this is done and you can print this out for your records if desired.



Adding a Collection Order

From the order details screen, if a client has items in use for which there are no collection orders already on the system, you will be able to click on Add Collection. You will be able to enter order header details as for delivery orders, then click on continue to see the list of items in use. You will be able to select some or all then click on Collect to arrange a collection date.



Rescheduling a Booking

Some users may be allowed to change an already arranged journey date or to take a booking that is on Hold and schedule a date for delivery. This is done by finding the client, going into the Orders and clicking on the relevant booking ID. There may be restrictions or warnings given if the booking is on a journey that has been printed.

Reviewing an Item

On the stock search screen the user may see how many reviews for a particular item have been submitted and approved and an average star rating. If reviews are visible on your system, the user can click the relevant area and read the reviews and submit a review with a star rating. (one to five). The submitted review will need to be approved by a supervisor before it is visible to other users of the system.

Authorising Orders

A referrer may be allowed to raise a delivery order for an item which they are not authorised to order. The order will not have stock allocated but will remain on a waiting list pending authorisation. Referrers who are permitted to authorise orders may do this by selecting the Authorisation Pending option under the Reports tab.

In order to authorise orders, a referrer must have permission to order that item and be set up with a referrer record for the same base as the original referrer, and be set as able to authorise orders for that base.

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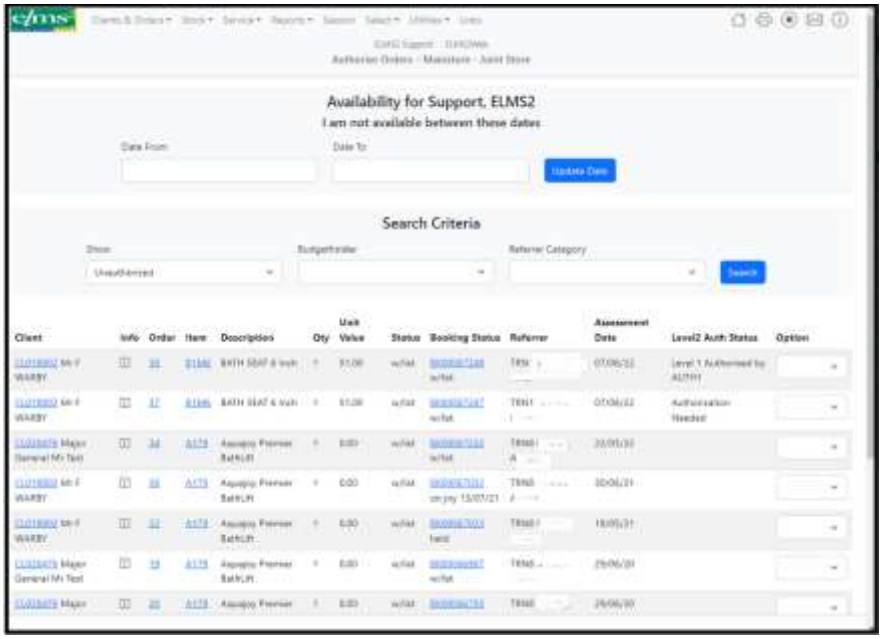


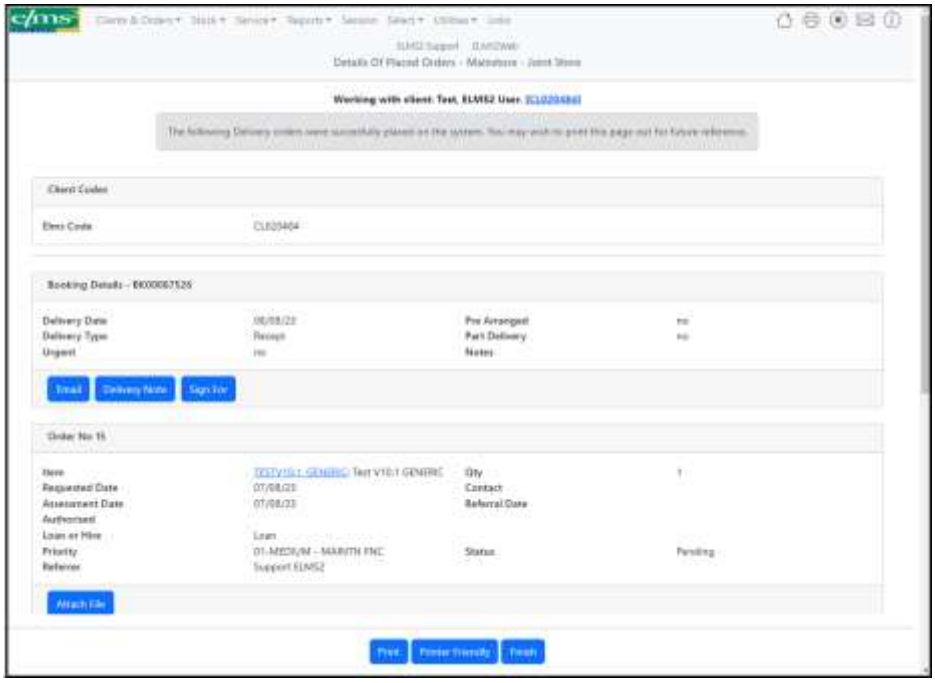
Toggle on the Authorise to set an unauthorised order as authorised; stock will be allocated at this point if there is sufficient in the store.

Attaching External Documents and Emailing

The following screens show the method for attaching external documents to orders and emailing the booking with attached documents. This might be used for example in the case of adaptations being requested where extra details need to be sent.

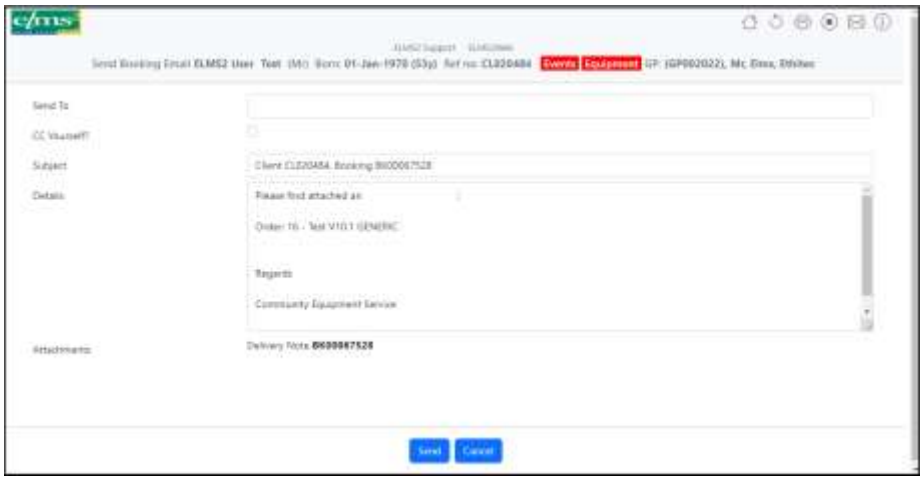
If the user has rights to the ‘external document’ tables (EXTDOC_ and EXTDOCDAT_) then the Booking Details Screen will have an ‘attach’ button next to each order. Any document such as a scanned in document or a photograph or a Word document many be attached. The user should attach the document to the order it relates to.

There is a new system flag to support this which must be set if the user is to be allowed to have the option to email from the Booking Details screen, attaching any documents which have been filled in. This new flag, WBkgEmail, should either contain an email address where the emails must be sent, or an email address followed by an asterisk * to indicate the user can change the email address if they wish, or just an asterisk if the user should type in an email address.



The booking details screen with both Email and Attach buttons showing.

The screens used when the Attach button is clicked – use Choose File to find a document. Use Upload to bring the document into the database.



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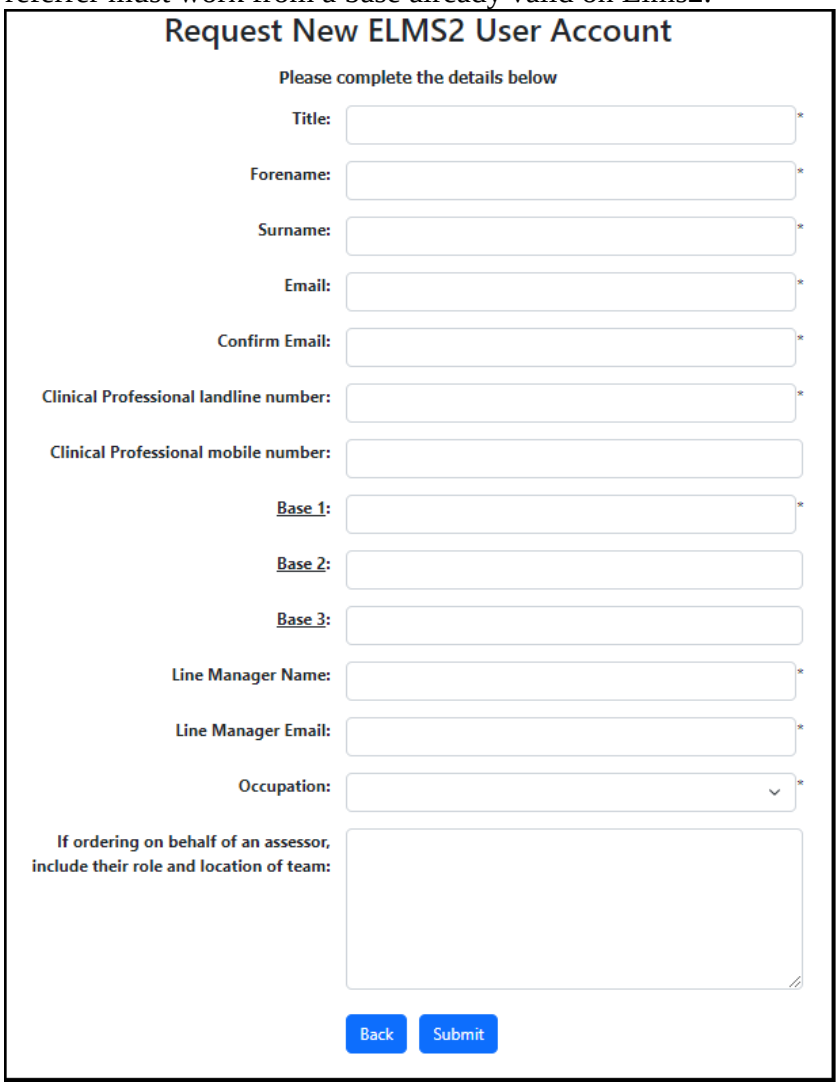
The screen used when the Email button is clicked – append to the details as required, and toggle to select which documents (these may be documents relating to the item filled in on Elms2 or external documents).

Registering as a new user On-line

Where a referrer has not yet been assigned a userid and password of their own, they can request this on-line, using the Register New User button.

This will pop up a form for details to be entered. Clicking on Base will bring up a pick list of bases; this is mandatory – the referrer must work from a base already valid on Elms2.



The actual form may be site-specific with fields that differ from the standard one shown. If the submission of this form results in the user being given a user id and password, this information may be communicated back to the new user via the email address provided.

Requesting a new password On-line

An existing user who has forgotten their password may be able to request a new password on-line. The ‘Forgotten your password?’ option will appear below the user id and password field on the Login screen. The new password may be a system-generated password which is communicated back via the user’s email address, and will generally have to be changed at first login.

Running Reports

Any of the system reports may be made available via the Reports tab folder: Please see the Reports guide for more information.

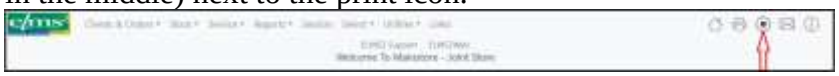
Links to other Web Pages

There may be other links set up e.g. to the Medical Devices Agency – if so, these will appear under the tab folder Links. You may click on these to open a new browser window to that web page.

Logging Off

When you close the window, unless you have chosen to log off you may still have details of your last session stored in the database. If you log back in within a short space of time with the same User ID, you have access to records which you had selected before (e.g. the selected client code). It is probably best to log out and in again, unless you specifically want to just close the window for a few minutes while out of the room but then continue with your work.

To log out, click on the Logout symbol (the circle with a square in the middle) next to the print icon.



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