Analyst Version 3.46

System Setup

January 2011

An extract from the full Analyst manual containing:

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Time & Attendance
Branches
Licensee Details
VAT Rates
Currencies
Time Zone Pricing
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System Setup

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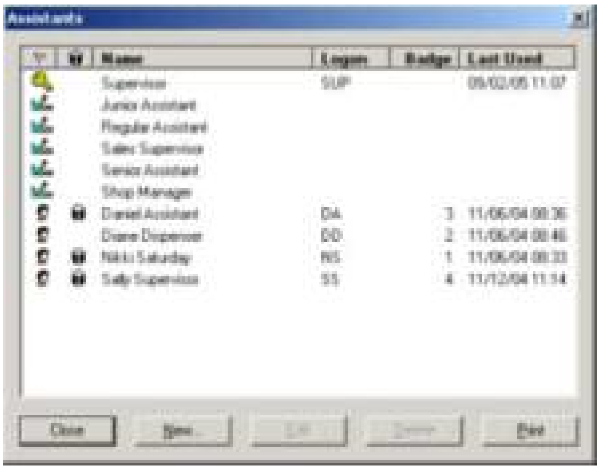
Assistant Setup

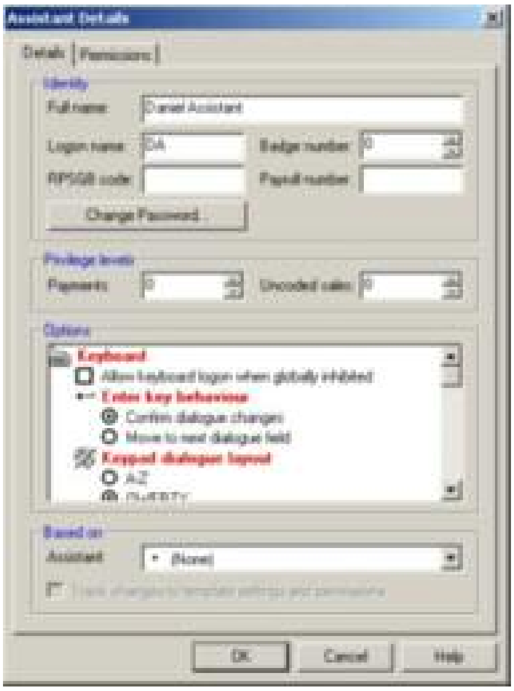
The level of security on your system can be adjusted to suit your needs and one of the most useful ways of limiting access to sensitive areas or functions is to configure assistant profiles with varying degrees of access to the system. The Assistant setup can be found from the **Setup** menu and then the **Assistants** option.



Listed are the System Supervisor, the assistant Templates and assistants already setup on your system. A padlock next to an assistant name indicates they are tracking a template. Display which assistants are linked to each template by highlighting a template in the list. The assistants which are tracking it will change to red. Conversely, highlight an assistant which is tracking a template and the associated template will display in red text.

There are more columns than will fit on the screen but the columns can be re-ordered to suit the needs of each assistant that uses the screen by dragging the desired column into place.

To view, modify or add an assistant, select an assistant from the list and press **Edit**, or select **New** to create one from scratch. There are initially two tabs for each assistant.



The **Full name** of the assistant should be entered at the top of the details tab in the Identity section. The **Logon name** is a maximum of 3 characters so it is convention to use their initials. Click on the **Change Password** button to set or change the assistant password. If you are using ScanBadges type the number in the **Badge number** or scan the badge whilst on this screen. The **Payroll number** is for your reference.

Enter the **RPSGB** code of the assistant if they have one. When using the ETP or Minor Ailments service the system must identify a responsible pharmacist. This is the assistant who is currently logged on if they have an RPSGB number in their profile or the earliest assistant to log on that day with an RPSGB code. A full name must be entered for any assistant with an RPSGB code.

The Privilege levels allow graded access to Payment Methods and Uncoded Sales (UCS). These are themselves are granted a privilege level and if the assistant has a privilege level equal to or greater than the level specified in the payment method or UCS they are able to use it. If not they are denied access.

The Options section contains configuration settings to make the use of Analyst easier for each assistant.

The Permissions tab is used to allow access to specific features.

Assistant Options

In the options section of the assistant setup allows some personalisation of the system whilst this assistant is logged on.

Allowing a keyboard logon when globally inhibited allows this assistant to logon with their name and password when others must use their scanbadge. This is useful for area managers who may not be able to have a scanbadge for each shop they visit or as a temporary work-round for an assistant who has forgotten or lost their scanbadge.

The Enter key function allows the enter key to operate as alternative to either the **OK** button or the tab key on dialogue screens whilst the keypad layout options allows the on-screen keyboard to be either the standard QWERTY layout or alphabetically arranged for assistants less familiar with QWERTY.

First dialogue field auto-select allows the default Windows behaviour of selecting the entire contents of a field when a dialogue box appears. This is useful of you find the Full Description of products are being overwritten accidentally.

Mainly for use with the auto-log off at end of sale/session options the security section allows the requirement for a logon password to be overlooked if this assistant has been logged on within the last 10 minutes. This allows a compromise between a secure system and speed of use.

This assistant can be forced to pre-declare till-totals and be denied access to the check and view functions.

For use within Analyst PMR, this assistant can opt to have the advisory drug interactions (warnings) and adverse drug reactions (contra-indications) suppressed. Whilst the serious drug interaction messages cannot be suppressed, the password normally required to acknowledge them can be overlooked.

Using an Assistant Template

You can save time by basing the options and permissions on a template. Use the **Based on** option at the bottom of the setup screen to select a template to base this assistant's permissions on. This can either be done as a one-off or you can use the check box to track the template. This is particularly useful when managing more than one or two members of staff at the same level.

With the **Track changes** option checked any change made to the selected template will immediately affect this, and all other assistants tracking it. Most of the options in the assistant setup will be greyed out when tracking a template as changes are made from there rather than directly with the assistant profile. Any options which are not greyed out are specific to this assistant and can be changed accordingly.

Assistants that are set to track the changes of a template have a padlock displayed next to their name in the assistant list.

Assistant Permissions

The Permissions check boxes allow access to certain functions within the system. The full list of permissions can be viewed on the permissions page which can be printed out to help design your setup. All settings are all turned off by default, but to help speed things up there is a shortcut to copying profiles from other assistants in your system and even a few that we have created for you. By selecting an existing member of staff from the **Based on** combo box or one of the templates, a profile will be created for you.

NOTE: The standard profiles are only a guideline and are intended as a base which should be modified to your needs.

Assistant Passwords

Each assistant can be setup to require a password to logon to Analyst. A password is compulsory for pharmacists (assistants with an RPSGB number) and *all dispensary staff* on ETP2/CMS enabled systems.

To set up a password for an assistant open their details and click on the **Change Password** button.

Type in a password into the **New Password** field. As the password is typed in the strength is assessed and the bar at the bottom displays how secure it is. A secure password will contain a combination of some or all of upper case letters, lower case letters, numbers and punctuation or symbols. You should not use the assistant name or initials. In certain circumstances a 'strong' password is required to access dispensary functions of Analyst. This is one which exceeds the marker on the strength meter.

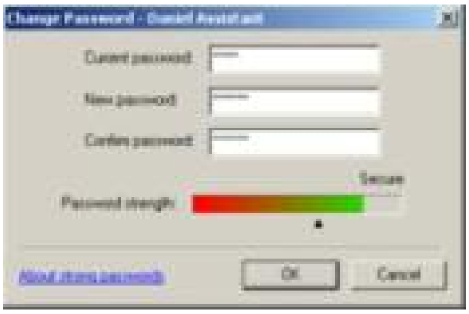
Once you have created suitably strong password, retype it in the **Confirm Password** field. Click OK to save the password.

Changing Passwords

Any assistant's password can be changed at any time by anyone with the authority to access the assistant permissions. So it is important that only key members of staff have such privileges.

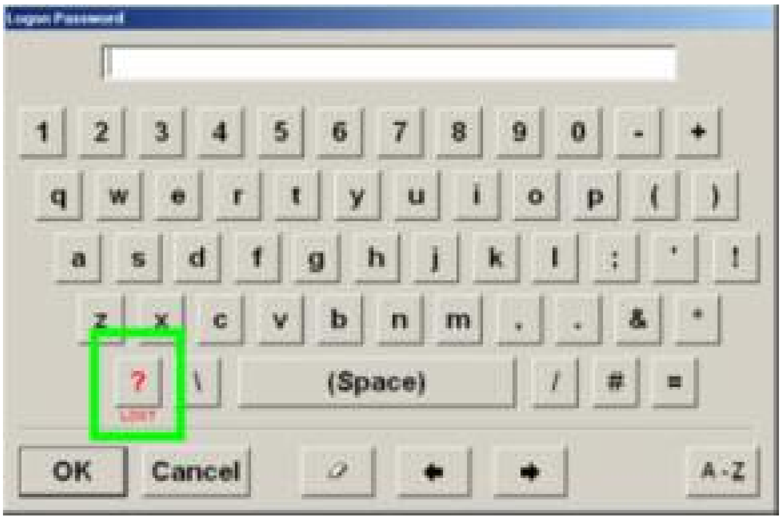
Any assistant can change their own password at anytime however. Whilst logged on select **Admin** then **Change Logon Password**.

The password dialogue appears and requires the current password to confirm the identity of the assistant and then allows a new password to be entered.



Forgotten Passwords

If an assistant forgets their password they can reset their password. During an attempt to logon click the **Lost** button.



The change password dialogue will now appear, but instead of requesting the old password the assistant will be required to enter a code supplied by the CareDesk.

The call to the CareDesk is required to confirm identity and create a log of the event. Call them on 01257 235940, introduce yourself and quote the 12 digit code to them. They will provide you with a 4 digit unlock code to type in. Then create a new password and confirm it.

Password Expiry and Rotation

Passwords can be set by the system super to expire after a period of time and/or prevent constant re-use of the same password. These are best implemented in conjunction with each other. Both of these options are available on the **Password Policy** tab of the Supervisor assistant permissions.

Expiry
Place a tick on the box if password should expire and type in the number of days the password will remain valid for. 5 days before the password is due to expire a warning is displayed to the assistant each time they logon to warn them how many active days left they have of their current password.

If an assistant's password is due to expire within 7 days a warning will appear each time they log on. If they fail to change their password in time their password will expire and they will

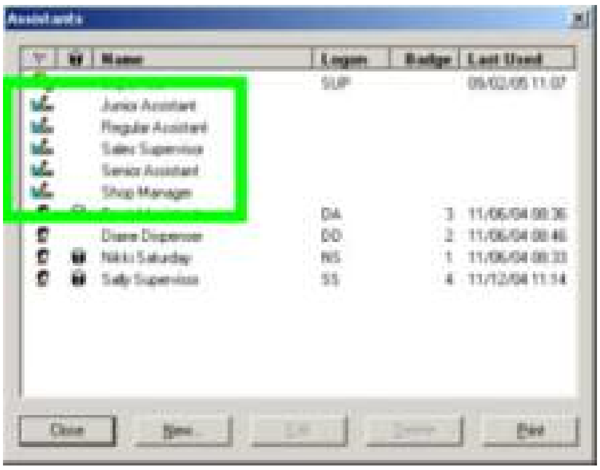
only be able to logon by creating a new password. Their assistant profile will be locked 7 days after password expiry. An unlock code will then be required from the CareDesk.
Rotation
If this option is not selected an assistant would be able to re-enter the same password or switch between a select few passwords which may become known to others. By forcing them to use at least 3 or 4 distinct passwords they can still rotate their use but must invent more passwords in the first place.

ETP2 Passwords

If your system uses ETP2 then *all PMR assistants* must use strong passwords. Failure to specify a password of sufficient strength (up to or beyond the marker on the strength meter) will result in the removal of all PMR permissions and privileges. The original permissions the assistant had will be re-instated when a sufficiently strong password is supplied.
Blank Passwords
By default Analyst will insist that all assistants should have a password. This is not recommended, but blank passwords can be permitted by selecting the option on this screen. Assistants who have no password, or a password which is not strong enough will not be allowed access to any dispensary or patient data under any circumstances.

Assistant Templates

When setting up assistants on the system it is a good idea to try and specify levels of access and assign your staff to them. In the Assistant setup there are some example templates already defined.



These can be used to base your assistant permissions on. They cannot be edited though. To provide yourself more flexibility copy the template you wish to use and base your assistants on that one. Any change then made to any of your own templates will affect the assistants which have their permissions based on it.

To create your own template highlight one of the standard templates in the list and click the **Copy** button at the bottom. (This is usually the **Edit** button but as you can't edit the standard templates the button changes to allow you to copy it)

A new template will appear for you to edit. Type in a title for the new template in the Full Name field.

Certain options are not available in the template. These options must be set individually in each of the assistant profiles.

Set the options you would like for this template on both tabs of the setup and click **OK**. The new template will be displayed in the list. To use the template, edit or create an assistant and use the **Based on** at the bottom.

Assistant Logon Activity

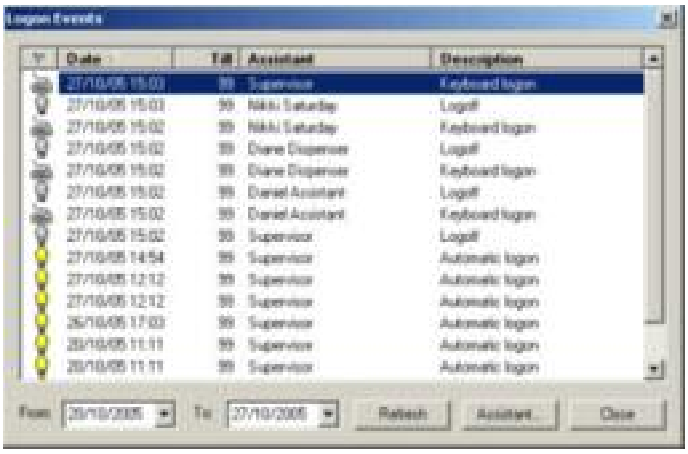
Every time an assistant logs onto Analyst it is recorded. This can be helpful when checking who was logged on at a particular time on a particular till and is required to nominate a responsible pharmacist for the ETP and Minor Ailments Schemes.

The following events are logged:

- Scanner logon
- Keyboard logon
- Automated logon at startup
- Assistant logoff
- Assistant clock-off
- Attempt to logon with invalid user name
- Attempt to logon with invalid password
- Logon abandoned at password prompt
- Keyboard logon attempted when prevented in assistant settings

The last four options are only recorded if the 'Record failed logon attempts' option is checked in the Options tab of the PoS system configuration.

All events can be viewed by selecting **Admin** from the PoS menu bar then **View Logon Events**.



The window displays the date and time of the event, the terminal number the event took place on, the assistant concerned and the description of the event. By default the information for the last 7 days is displayed, but by using the date range selectors at the bottom left and clicking the **Refresh** button the information for any date range can be viewed.

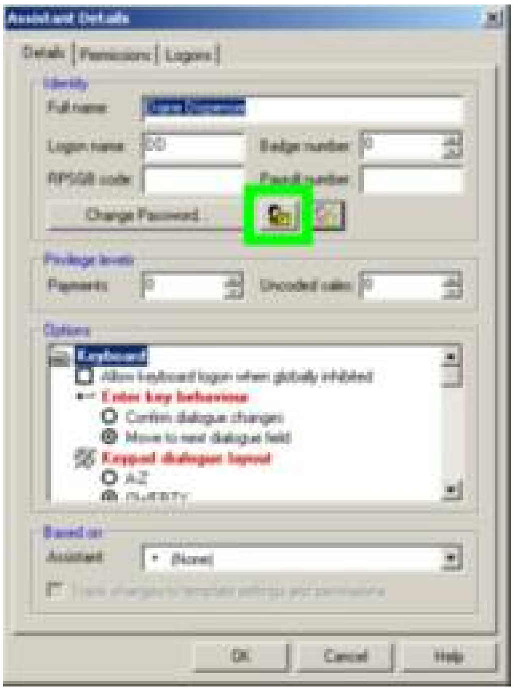
The assistant details of the highlighted line can be viewed by clicking the **Assistant** button. Their logon history is displayed on the Logon tab. Again, use the date selectors and the **refresh** button to display the desired date range.

EPS2 Smartcards

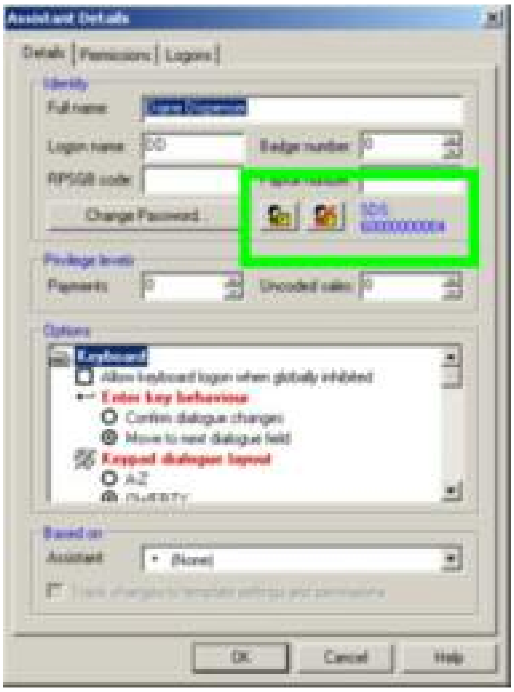
All assistants using EPS release 2 will be issued with their own NHS Smartcard. This allows access to the Spine to retrieve scripts and to post messages back. An Analyst assistant can be associated with the smartcard to allow assistants to be automatically logged onto the system.

In order for this to happen their assistant profile must be amended to include their card details.

Open the assistant editor from Setup, and Assistants. Select the assistant to add the card to and click **Edit**. Their details are displayed. Insert their smart card now.



With the card inserted (and with the unknown icon in the bottom left corner) click on the New Card button on the assistant setup.



The card number is now displayed next to the card buttons.

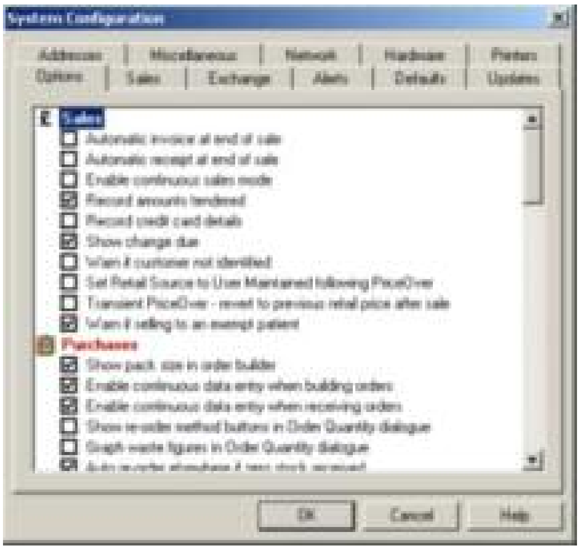
If a card needs to be disassociated with an assistant click the button with the line through it. The procedure of associated the assistant with a new or different card can begin as above.

System Configuration

The system configuration of Analyst defines the way certain features of the software behave. Software requirements vary from shop to shop and to accommodate this there are many options which allow the nature of the software to be tailored to your needs.

Some important settings are contained in system configuration so only the System Supervisor is permitted to access this section. If you need to gain access but do not know the relevant passwords to log on as the Supervisor you should contact your manager or the CareDesk. The CareDesk can provide access in an emergency or if you have genuinely forgotten the password, but for your own security will be asked who you are and why you need access to this area of the software.

When logged on as the Supervisor select **Admin** then **System Configuration** or in Analyst Main Office select **Setup** and **System Configuration**. Analyst PoS, PMR and Main Office all have a system configuration but each has different contents. They are displayed below.



Analyst PoS System Configuration

The Analyst PoS System Configuration contains the following tabs:

- Options
- Sales
- Exchange
- Defaults
- Updates
- Miscellaneous
- IMS
- Network
- Hardware
- Printers
- Alerts
- Addresses

Analyst PMR System Configuration

The Analyst PMR System Configuration contains these tabs:

- Options
- Dispensing
- Label
- Endorsing
- Alerts
- Addresses
- Miscellaneous
- ETP Tab
- MAS Tab
- Robot Tab
- Printers

Analyst Main Office System Configuration

The Analyst Main Office Configuration contains these tabs:

- Main Office
- Paperwork
- Printers

PoS

PoS Options Explained

Below is a complete list of the options available in the Options tab of the System Configuration of Analyst PoS. Where the default settings are described as ON or OFF, ON indicates a tick in the box for the option, OFF indicates a blank box for the option. Local settings are specific to the terminal on which the change is made where a Global setting will affect the entire system.

Sales

Automatic Invoice at end of sale

An invoice for the complete sale will print on blank A4 paper from the printer selected as the invoice printer in the Printers tab of the System configuration. If the customer has been identified, their details will be contained in the address box on the invoice, otherwise it will remain blank. (Default setting: OFF) [Local]

Automatic receipt at end of sale

A receipt for the completed sale will print from the printer selected as the receipt printer in the Printers tab of the System Configuration. (Default setting: OFF) [Local]

Enable continuous sales mode

A new sale screen will immediately appear when the previous sale is completed, removing the need to click **New Sale** button. This option cannot be used in conjunction with 'Automatically log off at end of sale' and any blank new sale screen is subject to the 'Automatic end sale time-out' on the Miscellaneous tab of the system configuration. (Default setting: OFF) [Local]

Record amounts tendered

Analyst will require the amount tendered by the customer to be entered after declaring the payment type. The amount due will appear by default. Over payments will result in the cash drawer to open and the 'change due' to be displayed (if selected). Under payment will return to the payment type selection for further payment with the outstanding balance displayed in the sale detail. The cash drawer will only open when full payment has been received. If this option is not selected the cash drawer will open following selection of payment type and a mixed tender cannot be performed. (Default setting: ON) [Global]

Record credit card details

Analyst will require the input of the card number and expiry date of any credit or debit card used. A separate dialogue to enter the details will appear when the **Card** payment type is selected. NO PAYMENT IS TAKEN THROUGH ANALYST. The card details are not checked though if a date is entered which is earlier than the day of the sale a warning that the card has expired appears and re-entry or alternative payment will be required. (Default setting: OFF) [Global]

Show change due

If an overpayment is entered at the end of a sale though any payment type the 'Change due' will appear at the bottom of the screen at the same time as the cash drawer opens. This change is always deducted from the cash-in-drawer total regardless of which payment type was used to overpay. This option is not available if the 'Record amounts tendered' is not selected. (Default setting: OFF) [Global]

Warn if customer not identified

This displays an information panel at the bottom to warn if a customer has not been identified in the sale. The options to identify the customer now or carry on regardless are offered. (Default setting: OFF) [Global]

Set Retail Source to User Maintained following PriceOver

If an item is subject to a PriceOver during a sale and this option is selected the retail price source for the item will change to 'User Maintained' regardless of how it was maintained before. This will remove the item from any control by the database update mechanism and will require the retail price to be maintained manually. (Default setting: OFF) [Global]

Transient PriceOver- revert to previous price after sale

Price changes can be temporary using this option. Any price changes made during a sale using a PriceOver will only be for the selected line in the sale. The price in the product record will remain unchanged and further entries of the item whether in the same or a different sale will appear at the original price. This transience can be overridden by assistants given the power by selecting the 'Over-ride transient PriceOver' option in the permissions tab of their setup. PriceOvers performed by empowered assistants are permanent. The Supervisor always makes permanent price changes using the PriceOver facility. (Default setting: OFF) [Global]

Include outstanding Layaways on today's Previous Sales screen

Layaways made before today can sometimes be lost in the system as they can only be recalled if the day on which they were laid away is known . This option carries each day's outstanding Layaways onto the current Previous Sales screen making them easier to find and reducing the chance of them being lost. (Default setting: OFF) [Global]

Open cash drawer for account sales

Depending on your system for account sales the cash drawer can be permitted or forbidden from opening for account sales. No money is tendered for the sales so normally there is no need for the drawer to open. (Default setting: ON) [Global]

Warn if selling to an exempt patient

If a patient is identified in the sale and is marked as exempt a warning will appear if a NHS script is entered. (Default setting: ON) [Global]

Automatically print receipt, even if amount due is zero

It is fairly pointless to print a receipt for sales which only have an exempt script in them. This option can be therefore turned off to save paper and hassle. (Default setting: ON) [Global]

Display preset amount buttons for account payments and payouts

Displays the preset money amount buttons when accepting payments or making payouts to customers. (Default setting: ON) [Global]

Display OTC drug interaction alerts during sale

Displays any drug interaction information based on the items sold in the sale. Only available with the OTC+ database. (Default setting: ON) [Global]

Sale activity highlighting

An exclamation mark can be placed next to each sale on the Previous Sales screen which contain certain activities which might point to misuse or help identify a training need. Select any or all of the nine activities in the list. (Default settings: barcode correction - OFF, Cashback- OFF, Item discount - ON, Refund - ON, PriceOver- ON, Line clear - OFF, Quantity button - OFF, Sale Discount - ON, Previously laid-away - OFF) [Global]

Purchases

Show pack size in order builder

A column displaying the pack sizes of items can be displayed when building orders or when viewing built orders in the purchases section. The pack size field is only populated when using Analyst PMR. (Default setting: OFF) [Global]

Enable continuous data entry when building orders

When selected the quantity dialogue will automatically appear for the next item in the order once invoked. When not selected, each item must be selected individually and the quantity dialogue invoked to modify the quantity. (Default setting: ON) [Global]

Enable continuous data entry when receiving orders

When selected the quantity dialogue will automatically appear for the next item in the order once invoked. When not selected, each item must be selected individually and the quantity dialogue invoked to modify the quantity. (Default setting: ON) [Global]

Show re-order method buttons on Order Quantity dialogue

The re-order method of an item can be permanently changed by clicking on the preferred method on the quantity dialogue. This option is used to show the buttons to make such changes or not. (Default setting: OFF) [Global]

Graph waste figures in Order Quantity Dialogue

The monthly wastage figures can be added to the graph on the order quantity dialogue which already contains the monthly information for sales and purchases. (Default setting: OFF) [Global]

Auto re-order elsewhere if zero stock received

If a quantity received of an item on an inbound order is reduced to zero it can be flagged to re-order elsewhere/anywhere with this option. The item will be attached to any built order, for which it has an appropriate supplier code, with its original order quantity. The flag can be manually added or removed to a product on the buying tab of the product editor. (Default setting: ON) [Global]

Defer real-time ordering to end of transaction

The background replace and background auto re-order methods generate the order quantities for items as they are used in sales or dispensing sessions. On slower systems this can cause a slight but noticeable pause in the selling or dispensing process. This option allows all background re-order calculations to be performed when the sale or dispensing session is concluded which will result in longer than normal pause on slower systems but at a less noticeable and critical time. (Default setting: OFF) [Global]

Discard background order lines if no order code available

With this option selected an item will not be added to a background order if there is no suitable order code available. (Default setting: OFF) [Global]

Offer to merge orders before sending

If more than one built order is detected for the same supplier Analyst can offer to merge them together if one of the orders is to be sent. (Default setting: ON) [Global]

Use higher quantity rather than sum when merging

If an item exists on more than one order when orders are merged this option determines whether the highest order quantity in all of the orders or the sum of the order quantities from all of the orders are to be used. As the 'on order' field is not updated until the order is sent, duplications of ordered items can occur. Manual orders can also sit side-by-side with generated orders and may contain similar items. (Default setting: ON) [Global]

Ask before marking order Inbound when printing

Printing an order is a method of marking the order as sent which will update the items on the order. If a printout is required though without marking the item as sent this option must be selected. If this option is not selected then printed orders are automatically marked as sent. (Default setting: ON) [Global]

Ask before saving changes to inbound order during goods in

Prevents changes being saved automatically when closing an inbound order in good in by providing a 'Save the changes?' option. (Default setting: OFF) [Global]

Automatically retry failed order transmissions

Failed order transmissions will be retried 4 to 5 minutes after failure if this option is selected. The order must be manually resent if not. (Default setting: OFF) [Global]

Send scheduled orders from this workstation

Orders can be scheduled to be sent at some time in the future using the Scheduled Order Transmission facility. This option determined which terminal on the system is connected to the phone line or internet and should be responsible for the sending of orders. When this option is selected on one terminal it is de-selected on any others which may have it set. (Default setting: OFF) [Global]

Hide replies older than the purchase history window period

Completed orders can be hidden when they are older than a certain age in the 'Retain completed orders' option on the Miscellaneous tab of the system configuration. This option allows the replies to follow the same rule. (Default setting: OFF) [Global]

Mark zero stock lines counted when stock received

After a stock take when the figures in the system can be trusted this option can allow items which are delivered to be marked as counted if the initial stock level was zero. The item will then immediately start to re-order intelligently if the re-order method is set to Auto. (Default setting: OFF) [Global]

Display filtering options when creating order from shortages

Orders can be filtered from the suggested shortages screen if this option is selected. The filter dialogue contains a 'don't show this again' box which, if ticked, de-selects this option. (Default setting: ON) [Global]

Highlight non-compliant lines when building supplier orders

A column is inserted in the order builder to display an icon for lines which are displayed on the order but are not normally ordered from this supplier, which is known as Ordering Compliance. (Default setting: ON) [Global]

Summarise retail value and margin when printing inbound orders

The summary at the foot of printed inbound orders will include the retail value and margin when this option is selected. (Default Setting: ON) [Global]

Ask before manually sending an order having lines without order codes

Attempts to send any orders which contain lines that do not have a suitable code the intended supplier will result in a warning. The order can either be reviewed or sent regardless. (Default setting: ON) [Global]

Offer to change daily supplier when transferring lines on an order

When the transfer button is used on the orders screen this option provides a pop-up to be displayed which will offer to change the daily supplier of each of the lines being transferred to the destination supplier. Very useful for new systems when daily suppliers are still being set. (Default setting: ON) [Global]

Include products with negative stock in aggregated stock levels

This option will include all counted stock in a drug family to be accounted for in the aggregated stock, even those with negative stock levels. Note that the product has to be 'counted' to be included in this option. (Default setting: OFF) [Global]

Include uncounted products in the aggregated stock levels

This option includes all uncounted products within a drug family in the aggregated ordering. Only positive stock levels will be included unless the option above is also selected. (Default setting: OFF) [Global]

Show family equivalents when unexpected received product scanned

When an item is scanned in a delivery and no match is found, with this option selected other items from the same drug family on the order are displayed and opportunity to perform a substitution is offered. If this option is blank the scanned product would just be appended to the order as unordered goods. (Default setting: ON) [Global]

Allow receipt of unexpected lines in place of lines on order

With option selected scanned lines can be accepted as the original line in the order from the same family. This increases the stock of the ordered line and not the scanned line without leaving an audit trail of its actions and as such can mess up a stock file unless fully understood. (Default setting: OFF) [Global]

Open product editor on Purchases tab when invoked from an order

With this option selected the **Expand** button will cause the Purchases tab of the product editor to open up rather than the default Details tab. This action can be temporarily reversed by holding down the SHIFT key while expanding. Similarly if this option is not selected the SHIFT key will open the product editor on the Purchases tab as a one-off. (Default setting: OFF) [Global]
Shelf Filling Lists

Remove refunded items if returned to stock

If an item is returned to stock when refunded it is deemed as saleable and if this option is selected its replacement which was on the shelf filling list will be removed. (Default setting: OFF) [Global]

Prompt before clearing figures after printing

Printing the shelf filling list also clears the totals so new sales of items can start to accrue on a new shelf filling list. This option provides the choice to clear or not to clear the figures when the print button is clicked. If no prompt is selected the figures are cleared automatically. (Default setting: ON) [Global]

Till Totals

Automatically print till Lifts on receipt printer

The till lift will print without prompting on the receipt printer. Duplicates can be printed from the till totals screen. (Default setting: OFF) [Global]

Require daily password to perform additional till Lifts on same day

Extra security is provided by requiring staff to call the CareDesk for a password if a second or subsequent till lift is required. The CareDesk advisor will record who has called for the password and why they require it. (Default setting: OFF) [Global]

Warn if pre-declaration outstanding for more than one hour

The pre-declaration feature requires the cash drawer to be removed, counted and declared before a total is given. If this process is not complete a warning can appear after one hour to complete the process as failure to do so can impact of subsequent totals. (Default setting: OFF) [Global]

Allow till Lifts and Bankings when running offline

Lifts and Bankings performed when running offline might cause a problem if the data is not re-processed when the data is back online. Totals may run awry. Lifts and Bankings are reprocessed as part of the procedure so can be permitted if the correct procedure is to be followed. (Default setting: ON) [Global]

Open cash drawer when performing till Checks

A till Check provides a running total of sales so the cash drawer need not normally be opened. (Default setting: OFF) [Global]

Receipt printer sections

The till totals are made up of a number of sections which are explained here. If some of the sections are not used they can be turned off to make them easier to read and to save till roll. (Default setting: all ON) [Global]

Report till Lifts and Checks to Head Office as they happen (HO Maintained Systems Only)

As Lifts and Checks are performed this option will cause Analyst to inform the Head Office system of both the event and the figures. This option will be displayed but grey if HO have set and are maintaining this option. (Default setting: OFF) [Global]

Security

Enable keyboard logon

Allows assistants to logon with their logon name and password instead of using the scanner and scanbadge. (Default setting: ON) [Global]

Start new sale after scanner logon

An assistant will save time by not having to put the scanner down and click on the New Sale button with this option selected. As soon as the scanbadge is scanned a new sale screen appears. (Default setting: ON) [Global]

Automatic log-off at end of sale

Logs off the current user at the end of each sale. (Default setting: OFF) [Local]

Automatic log-off at end of script

Logs off the current user at the end of each dispensing session. (Default setting: OFF) [Local]

Hold down shift key to prevent auto new sale or auto log-off

Used in conjunction with the above option this allows an alternative to the keyboard logon to access other features of the system or will keep the assistant logged on at the end of the sale. (Default setting: OFF) [Local]

Print receipts and invoices when no-one logged on

The **Receipt** and **Invoice** buttons are available to be used when no-one is logged on with this option selected and is usually selected in conjunction with the option above to allow receipts to be printed easily. (Default setting: OFF) [Global]

Confirm assistant logon

A confirmation of who has logged on appears at the bottom of the screen with this option enabled. (Default setting: ON) [Global]

Record failed logon attempts

Attempts to logon to Analyst which have failed because of bad entry of a logon name, password, abandoned attempts or attempts to logon with the keyboard when forbidden are recorded in the Assistant Logon Activity with this option enabled. (Default setting: OFF) [Global]

Enable Win-A as hotkey for Analyst EPOS

When Analyst PoS is running the key combination of **Win+A** will bring it to the front of all other applications if this options is selected. (Default setting: ON) [Local]

Enable Win-P as hotkey for Analyst PMR

When Analyst PMR is running the key combination of **Win+P** will bring it to the front of all other applications if this options is selected. (Default setting: ON) [Local]

Enable creation of Locum users from Responsible Pharmacist dialogue

This option allows a locum to create a basic assistant profile from the responsible pharmacist dialogue. (Default setting: ON) [Global]

Panic Button

Require Ctrl key to confirm Panic situation

To help prevent false alarms with the panic button select this option to require users to hold the **Ctrl** button whilst clicking the panic button. If it is clicked without the Ctrl button an 'Are you sure' style box appears to give an opportunity to back out of the alert. Alternatively the alarm can be confirmed or after 10 seconds the alarm is automatically confirmed. (Default setting: ON) [Local]

Notify others when Panic button pressed

Allows the transmission of the panic alert to other Analyst terminals on the system. (Default setting: ON) [Global]

Button location

Decided whether to have a panic button and where it should be located, in the title bar at the top or in the status bar at the bottom. (Default setting: STATUS BAR) [Local]

Description Search

Restrict to active products only

The search results will not include any inactive products. (Default setting: OFF) [Global]

EPOS: Exclude products not available from default daily supplier

The search results in Analyst PoS will only include items which have a valid order code for the supplier marked as the default daily supplier in the defaults tab of the system configuration. (Default setting: OFF) [Global]

PMR: Exclude products not available from default daily supplier

The search results in Analyst PMR will only include items which have a valid order code for the supplier marked as the default daily supplier in the defaults tab of the system configuration. (Default setting: OFF) [Global]

Auto extend restricted searches if no matches

This option is only available in conjunction with either of the above to search restrictions. If no items matches the search and is available from the default supplier the search can be 'auto-extended' removing the need for the user to click the **Extend** button. (Default setting: OFF) [Global]

PMR: Sort descriptions by cost price

In PMR searches generic items with the same name can be sorted to display in cost price order. (Default setting: OFF) [Global]

PMR: Sort descriptions by cost price

In PMR searches generic items with the same name can be sorted to display in cost price order. (Default setting: OFF) [Global]

Display extended description panel

Part of the search results screen is taken up with a description panel at the bottom which shows the full description of the highlighted item in the list. This helps with items with very long descriptions. (Default setting: ON) [Global]

Show price in result list

Displays the item's retail price in a column on the results list. (Default setting: ON) [Global]

Show stock levels in result list

Displays the item's stock level in a column on the results list. (Default setting: ON) [Global]

EPOS: Show pack size in result list

Displays the pack size of drugs in a column on the results list. (Default setting: OFF) [Global]

Show hit code in result list

Displays the item's hit code in a column on the results list. (Default setting: OFF) [Global]

Use large font for result list

By selecting this option the font used to display the results will be larger in size. This can make the list easier to view but a consequence is that fewer items can be displayed in the results pane and the descriptions will be more truncated than if the smaller font is used. (Default setting: ON) [Global]

Limit to restricted products initially when dispensing

The search whilst dispensing is initially restricted to products available from the default daily supplier unless the **Extend** button is pressed. (Default setting: OFF) [Global]

Automated Shelf Edge Labels

Automatically print labels after batch price updates

If selected this option will automatically print the shelf edge labels from this terminal for items updated by an update provided by Positive Solutions, your head office or a supplier. More details of this feature can be read here. Make sure this is the terminal with the appropriate printer attached. (Default setting: OFF) [Local - De-selects on other terminals where this is set. Only one possible on the system]

Print Receipt-based report, rather than shelf edge labels

With this option selected the receipt printer will produce a text report listing the prices changes instead of printing shelf edge labels. (Default setting: OFF) [Global]

Seek confirmation that labels have been printed and deployed

If the automatic shelf edge label printed has been enabled this option provides extra security that the labels have ben printed and put in place on the shelf edges. (Default setting: OFF) [Global]

Restrict labels to active products only

The update which has been applied will contain a wide range of products, some of which you may not stock. This option will restrict the printing of labels to only those that are active on your system. (Default setting: ON) [Global]

Restrict labels to OTC products only

With this option selected only OTC lines in the price update will have labels printed or will be included on the receipt based report. (Default setting: OFF) [Global]

Non-deployed labels auto price-over

There may be a problem if the new shelf edge labels are not deployed swiftly after applying an update as the price displayed on the shelf edge may not match the price on the system when the item is scanned. Technically you are required to sell the item at the lowest displayed price but the system allows a number of options. The new price can be charged whether or not the new labels have been deployed, the old price can be charged if the labels have not been deployed or the old price can be charged if it is lower than the new price and the labels have not been deployed. (Default setting: ALWAYS SELL AT NEW PRICE) [Global]

Product Editor Required Fields

Certain fields in the product editor can be set as required and if incomplete a warning will appear that the item is about to be saved without this vital information being completed. Select which fields are required from: Bulk supplier, buying codes, cost price, daily supplier, department, manufacturer, product group, retail prices, selling codes and stock level. (Default setting: BUYING CODES & SELLING CODES: ON, all others: OFF) [Global]

Check field contents

The above requirements will be checked just when a new product is saved or each time the product details are saved from these two options. (Default setting: ONLY CHECK WHEN SAVING NEW PRODUCT) [Global]

Miscellaneous

Edit report fields without pressing F2

The data held in the Analyst's standard grid style reports can be edited. The which can be edited contain information taken directly from the product record and any changes made are saved immediately, are permanent and are not undoable. To prevent accidental changes being made to the data de-select this option to require F2 to be pressed before a field can be edited. (Default setting: ON) [Global]

Enable Calculator title-bar button

A 'Calc' button is displayed at the top of the Analyst screen which will launch the Windows calculator. (Default setting: ON) [Local]

Enable CTRL/Shift key title-bar buttons

'Sticky' CTRL and Shift keys are displayed at the top of the Analyst screen when this option is selected. It is particularly useful when using a touch screen terminal where the keyboard is secreted beneath the counter as the CTRL and Shift buttons can be used when selecting certain options to achieve a different effect than normal and will not require the retrieval of the keyboard. (Default setting: ON) [Local]

Automatically purge discontinued products

This option will make any product with a re-order method of manual and a stock level of zero inactive as part of the daily initialisation. It will not delete it from the product file so any details held against it can be retrieved by re-activating it. (Default setting: OFF) [Global]

Show cost value in till totals

The cost value of the items sold in the sales period will be displayed as part of the summary at the top of the till totals read out. This figure will only be accurate if there is an accurate cost price figure for each of the items which has been sold in the sales period. Items sold through 'uncoded' buttons cannot report a cost price. (Default setting: ON) [Global]

Allow duplicate product descriptions

If this option is off Analyst will not allow more than one item to be saved with a description identical to one already saved in the system. By turning this on duplicate items may be created and cause problems, though for some supplier updates it is required to prevent errors occurring on import. (Default setting: OFF) [Global]

Hide 'Don't show this message again' checkboxes

Most of the information dialogues within Analyst contain a 'Don't show this message again' option at the bottom left. This option can be removed to force the information pane to display. (Default setting: OFF) [Global]

Include additional content in Head Office TSE files

This setting will provide more information to your Head Office as part of your Transaction Summary Export files which are created each day. (Default setting: OFF) [Global]

Create daily Head Office TSE files

If this system reports to Head Office then it will need to create the Head Office TSE files. These provide the Head Office with information about your daily sales. (Default setting: OFF) [Global]

Include 'Account Payment' in No Sale dialogue

Provides the facility for assistants to receive money as payment on a customer's account. This item can be withdrawn if you do not operate customer accounts. (Default setting: ON) [Global]

Include 'Account Pay-Out' in No Sale dialogue

Provides the facility for assistants to issue money to customers from their account. This option can be withdrawn if you do not operate customer accounts of do not want to issue customers with cash from their accounts. (Default setting: ON) [Global]

Warn if full description changed while editing product details

If the Full Description of a product has changed during a session in the Product Editor, a warning will appear to confirm that the change was deliberate. (Default setting: ON) [Global]

Warn if surname of forenames changed while editing account details

If details in the surname or forenames fields of the customer editor are changed whilst editing a customer a warning appears. This will help prevent loosing customer records by deleting accidentally their name. (Default setting: ON) [Global]

Continue with PSL data exchange if this workstation is not present

If this is a temporary addition to the Analyst network, like a laptop or consulting room PC, Analyst can complain about its absence when performing a data exchange. By selecting this option the terminal performing the exchange is not bothered if this terminal is not available. (Default setting: OFF) [Local]

Display fridge temperatures in status bar

Users with the PSL Temperature Monitor can opt to show the real-time temperatures of the probes in the status bar. Their icon and colour will also indicate at a glance whether they are in their tolerance zones, are too hot or too cold. (Default setting: ON) [Local]

Report RAID disk array failures

A warning will appear if a hard disk in a RAID array fails on the Analyst server. (Default setting: ON) [Local]

Synchronise workstation clocks with server time

Periodically the workstations will poll the server for the correct time. It is important for ETP systems to ensure that the entire system is operating on the correct time. (Default setting: OFF) [Global]

Remove discontinued order codes before next database update

Specifically designed for use in the Health Food sector where supplier codes are recycled, this option will remove order codes from product records which are marked as discontinued before applying the following update. (Default setting: OFF) [Global]

Request full database update on next PSL Data Exchange

If a full database update is required, select this option and a full update, rather than an incremental one, will be retrieved during the next PSL Data Exchange. The tick will then be removed from this option to avoid repeated downloads. (Default setting: OFF) [Global]

Highlight One Generics lines in description searches and orders

This places an icon next to lines which are currently included on the Mawdsleys ONE Generics scheme. (Default setting: OFF) [Global]

Include account holder's name in Google Maps and directions

When the location or directions button is clicked from the customer editor the account holder's name is included in the title bar, search field and search results. While this data remains in the pharmacy we do not consider this a security risk. But if you disagree, or you intend to print the resulting map for use off-site then this option should be deselected. (Default setting: ON) [Global]

Backups

Encrypt backup media

This option will use the super-secure AES-128 encryption when backing the Analyst database up. This option is only available for selection on PoS only systems. This option is compulsory for PMR and IPS systems as they contain patient data. (Default setting: ON (compulsory for PMR & IPS systems) [Global]

Backup network transmission file, not live database

During a normal system backup the live database is backed-up onto removable media but this requires the system to be closed for the duration of the backup. This is by far the preferred option, but if it is somehow impossible to do, the NTX file can be backed-up instead. The data will invariably be slightly older than the live database but it can be backed-up without closing the system. (Default setting: OFF) [Local]

Archive network transmission files

If regular archived copies of the database are required this option can be selected. Each Sunday the NTX file will be generated then copied to an NTA (Network Transmission Archive) file. These files reside in the C:\ANALYST\DATA\NTX folder with the rest of the NTX files on the server but are not broadcast to the slave terminals. The NTA files must be manually archived to removable media and/or deleted to avoid the drive being filled over time. (Default setting: OFF) [Local]

Backup patient and product images

Backs up any images files held against patients or products during the normal backup procedure. (Default setting: ON) [Local]

Un-mount USB flash memory drives when backup complete

If the backup device is a USB flash memory this option can be selected to 'un-mount' the drive once the backup is complete. Un-mounting the device closes the computer's connection to it. If the device is removed without un-mounting it the data stored thereon can become corrupt or incomplete. Note that if this option is enabled other USB peripherals may be simultaneously un-mounted as a consequence. (Default setting: OFF) [Local]

Automatically close Analyst on all workstations

When this option is selected the Analyst terminal performing the backup will execute a network shutdown of all Analyst applications. This will close all instances of Analyst PoS, PMR, Main Office and ETP Manager connected to the main Analyst database on the server. An opt-out will appear on each terminal prior to the shutdown which if selected will abort the backup procedure. (Default setting: ON) [Local]

PSL Falcon

Multi-scan mode

Enables the multi-scan mode of the Falcon. Rather than scanning an item once and entering the quantity of that item, each and every item can be scanned and the Falcon will count the number of different lines and the number of each line scanned. Ideal for stock taking 'bargain bins' or other areas of unsorted stock. (Default setting: ON) [Global]

Show bin locations

Items uploaded as part of a planned stock count will display the location field on the screen of the Falcon. This is taken from the Promo tab of the product editor. (Default setting: OFF) [Global]

Show current stock levels

Items uploaded as part of a planned stock count will display the stock level held by Analyst at the time of the upload to the Falcon. (Default setting: OFF) [Global]

Activate products scanned for Price Validation

This activates all items scanned in a batch using the Price Validation facility regardless of whether or not a price was actually entered.
(Default setting: ON) [Global]

Retain all stock count batches, even if all codes recognised

With this option on every batch of items downloaded from a hand held terminal will be stored as a report in the reports section. When off only batches with stock queries or unknown products are retained. (Default setting: OFF) [Global]

Product Modeller

Enable selective update of DFU-sourced data

This option restored previously hidden options in the product modeller which are for the maintenance of data such as allergies, adverse reactions etc. (Default setting: OFF) [Global]

Branch level ETP/AMS compliance

This specifies what type of ETP, if any, are in use at the branches. Branches running no ETP or ETP1/AMS are updated as normal and still have the option to change their product descriptions. Branches using ETP2/CMS *must* have the same product descriptions as in the model and so they are imposed on the branch. (Default setting: None) [Global]
Responsible Pharmacist absence

Sales of P, POM and GSL items

The use of Analyst's responsible pharmacist feature can be used to warn or forbid the sale of P, POM and/or GSL items according to the regulations or Analysts long standing Sale Restrictions can be used instead. If restrictions have been setup and successfully used before they can be extended to account for the presence of an RP. Otherwise opt for the Warn or forbid options.

Dispensing prescribed medication

Depending on whether or not an RP is present, the dispense, repeating and amendment of a patient's medication can be permitted, warned about or forbidden.

Handing out dispensed prescriptions

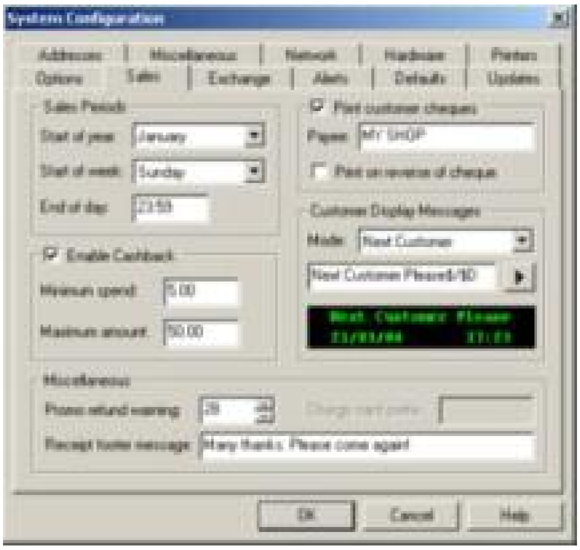
Depending on whether or not an RP is present, the handing out of a patient's medication (by scanning the bag label or through the Managed Repeats section) can be permitted, warned about or forbidden.

Delivering dispensing prescriptions

Depending on whether or not an RP is present, the delivery of a patient's medication (as part of Managed Repeats) can be permitted, warned about or forbidden.

Sales Tab

This tab contains sales related information and is contained in a number of sections within the window.



The Sales Periods define when Analyst will start your year, week and day. These are used for reporting purposes.

Cashback can be turned on here by placing the tick in the **Enable Cashback** box. A minimum spend and maximum cashback amount can be specified by typing the amounts in the fields.

If your system is fitted with a slip printer, cheques can be printed for your customers. Place the tick in the **Print customer cheques** box and complete the Payee field with your details. The customer's cheque guarantee card details are printed on the back of the cheque by placing a tick in the **Print on reverse of cheque** box. If this is selected you will be required to select the **Record credit card details** on the options tab and the card details must be entered into the system when requested.

The Customer display messages can be customised for a "Next Customer" (when an assistant is logged on but not in a sale), "Till Closed" (when no-one is logged on) and "training Mode" (when in training mode) setting. Select the mode from the drop down box and type the message to be displayed in the field below. Special characters can be inserted by using the button next to the message field by typing the character code in as displayed in the right. The image with green text indicates what the display will look like.

In the miscellaneous section only two options will be available. The **Promo refund warning** option allows a warning to appear to staff if they refund an item that has recently been on promotion. This will ensure that the customer is refunded the correct amount. The number in this option determines the number of days the system will look back and warn of such an event.

The **Receipt footer message** is displayed at the bottom of every receipt and can be used to thank your customers or provide them with news or offers. This is the only option on this screen which is specific to this terminal. All other settings are common, but different receipt footers can be configured for each terminal.

Exchange Tab

This section defines the communication parameters of your system to your head office (if applicable) and to Positive Solutions head office. As part of you SureCover package you are entitled to connect to our system to collect database updates, software updates and help file updates. Your system also provides a small report on the status of the system and any errors that may have occurred. This allows us to be warned of any problems that have occurred or are about to occur and helps us prevent problems from happening. We do not collect any personal or business information.

The screen is split into two halves. The details on the left are for head office communications and the details on the right are for PSL comms.
Direct dial connection
If your system will connect by dialling directly into either your head office or PSL select the modem which should be used to dial from the drop down menu and type in the phone number of the remote system. For PSL this is 01257 235960.
Internet Connection

If you can connect to the internet from the terminal which performs the data exchange you will be able to perform the data exchange to PSL via the internet which should be quicker and will certainly be cheaper. If you dial up using a modem or ISDN connection to your internet service provider (ISP) select the dial-up option which is listed in the drop down menu.

If this terminal is connected to an ADSL, cable or other broadband connection through the network select the "Local area network" option from the drop down menu.

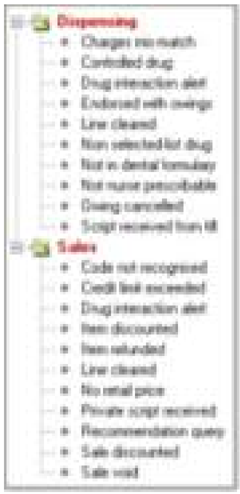
The head office side only need be completed if you are part of a group and are required to connect to your head office. Contact your administrator there and ask them for the details. Every system will need to connect to Positive Solutions at least every three weeks, but preferably every week. These details will be configured on install and should not be changed unless requested to do so by the CareDesk.

The fields are:

Account	Your unique number that identifies you to the head office/PSL system
Telephone	The modem number for the head office/PSL system. The number for PSL is 01257 235960
History (days)	How many days data is transmitted.
Send Till Totals	Sends Till Total information in addition to product information
Auto transmit	If the system is to send automatically, place a tick in the box and set the time in hh:mm 24 hour format. Click on the day to transmit, or the daily option to send every day at the time specified.
Send Data	Only select this if you are part of the PSL Data Collection Scheme and are being remunerated for your data.
Reset button	The resets the flags used to send the data to PSL. You may me asked to click on this by the CareDesk. It doesn't affect any data you use from day-to-day.

Alerts Tab

Depending on the audio capabilities of your hardware, the system can play a sound or speak a phrase for various sales and dispensing events. A list of events appears on the right below.



To nominate a sound to be played, select the event in the pane on the left of the tab and set the **Local Action** on the top right as appropriate.

If **Play sound** is selected, you will be prompted to select a WAV file from your system. This can be tested by pressing the loudspeaker icon, or changed by pressing the Browse (**...**) button next to the name of the WAV file. You can select a file from any directory on your computer, including network directories on other computers. Analyst will create a local copy of the sound file on your system.

If you would prefer the system to speak a message to you, select the 'Speak Message' option and type the appropriate message in the field beneath. Press the Loudspeaker button to test it. You may need to spell your word or phrase phonetically to coax the system into pronouncing it correctly. This latter option requires the Microsoft Speech API to be installed on your computer. If the **Speak message** radio button is disabled on your system, contact the CareDesk for a copy of the install pack for this feature.

The volume can also be altered on this screen by using the slider, or muted altogether by checking the **Mute** box.

The **Event Monitor** feature is not currently used, but will be developed to broadcast sounds for these events across through the network in your shop to a client elsewhere in the building. Call the sales team on 01257 275800 if you would like more information on the potential of the Event Monitor.

Defaults Tab

When creating new products it can be time consuming and frustrating to complete all of the fields with most of the same details. By completing the details on this tab of the system configuration any newly created and re-activated products can be completed automatically with the details that are setup here. By default all options are set to '(No Change)'.

There are two check boxes at the bottom of the window. On the left, newly added items can have their stock levels set to zero, and more importantly, counted. On the right, these defaults can be forced upon items which are re-activated or when edited and saved with the product editor.

Updates Tab

Almost all systems receive database updates. As the requirements from the update differs from shop to shop, this tab defines what changes the update will make to the system.

The miscellaneous options pane contains the fields the two main updates will change for you. You may have either or both updates applied to your system depending on your database. The main updates are the OTC update which contains C&D changes to the 80,000 line file and the Drug File Update (DFU) which is only applied to PMR and IPS systems as it contains the 20,000 line ethical database.

The options contained within the list determine which fields are updated. New products are added with all of the details. Once added though, only the fields which are checked are updated.

By placing a tick in the **Request full product file update** Analyst will receive a full product file rather than the incremental the next time a PSL Data Exchange is performed. Once a the full file has been received this tick will be removed so the system will return to requesting incremental updates. If the full update is requested and retrieved in the same week an incremental has been received and applied, the full update will need to be applied manually.

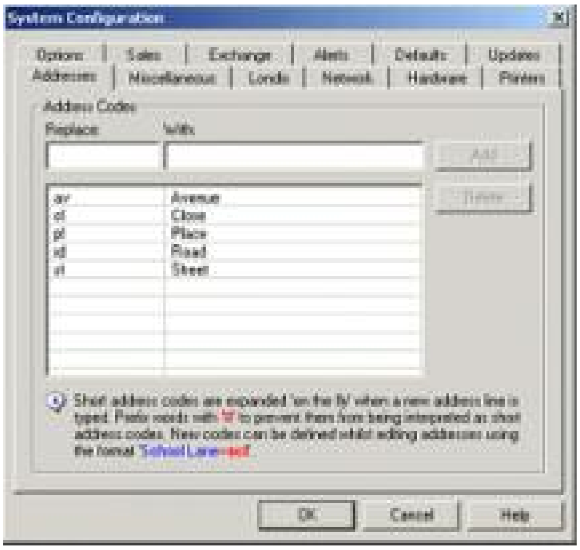
The **P-Item** option allows the selection of a sale restriction which can be applied to lines in the OTC update flagged as a P item. This is most commonly used to advise the assistant that they have just scanned a P item and to request the advise of the pharmacist.

The **External Price Updates** section allows configuration of updates from other sources. If you are the recipient of any of these, select the name of the update e.g. Numark from the **Source** box and select the default suppliers to be set against updated lines. Only suppliers with a PSL Source of "Numark" in the supplier setup will be listed in this menu. By selecting the **Force Prices** option all products included in the import will be updated regardless of the price source field in the Product Editor. All products included in the import can have the suppliers set to the selected suppliers by checking the **Force Supplier** box. New products can be created on import by checking the **Create New Products** box although this is not recommended as import files do not contain all of the information required by Analyst.

The bottom two sections determine the source of the prices on the details tab of the products. An updated product will adopt the price of the highest option in this list where there is a price for it in the update and which is above User Maintained. If no price is found in the update for the options above the User Maintained option the price is set to 0.00. The system can therefore be prevented from updating prices by shuffling the User Maintained option to the top of the list. Re arrange the options into your preferred order by selecting the source name and using the up and down arrows to shuffle its position through the list. The DFU contains the prices of 5 suppliers which are listed in the DFU topic.

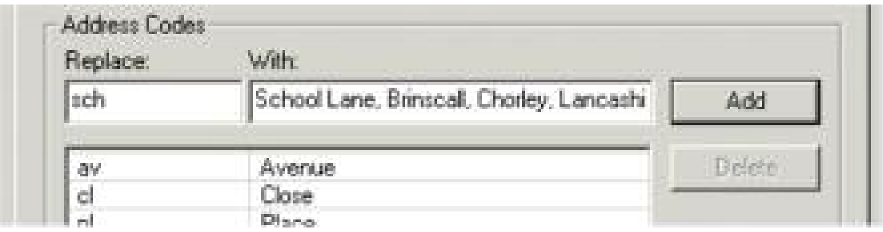
Addresses tab

Rather than typing in the same road and town names when entering new customers or patients into your system, shortcuts can be created to speed things up which are defined on this tab.



Some common options are set up already. To create a new one type in the abbreviation in the **Replace** field and the full text in the **With** field. Press the **Add** button to add the replacement to the list below.
For example " sch" when typed in the address screen could be replaced with "School Lane".

This can replace one or many lines of the address. To replace more than one line separate each address line with a comma in the **With** field. There is only one School Lane in Brinscall so " sch" could be replaced with the full address by typing "School Lane, Brinscall, Chorley, Lancashire, PR6 8QP" in the **With** field.



Using Address Short Codes

When entering an address in the customer/patient record, type in their house number then the short code.

Each address line can contain any number of address short codes, which Analyst will expand when the field is exited, by pressing **Tab**, or clicking on another field.

Adding Short Codes in the Address Screen

Address short codes can be added without the need to go into the System Configuration. For a single address line short code, type the address line in as normal and add your preferred short code prefixed by '='. For example to create a short code for Park Avenue, type "101 Park Avenue=pkav". As the next field is highlighted, the '= pkav' is removed from the display but added to the short code index. Now "103 pkav" can be used to add their neighbours. Analyst automatically removes any numbers at the start of replacement text entered in this way, since not everyone will live at number 101.

These are then added to the addresses tab of the system configuration and can be edited as normal if required.
Postcode Lookup
The system can also make use of the postcodes in your system as they accumulate to speed up entering addresses. This is covered in the New Customers topic.

Miscellaneous Tab

This tab contains options which don't tend to fit into other groups of options, but are nonetheless important.

The **Description Search Modes** for the PoS and PMR software determines which section of the database is initially displayed following a description search. This can of course be changed from within the search results window, but set the default in these option to be the most commonly used. "All" lines can be displayed or the lists can be restricted to "OTC" lines or "Dispensary" lines.

Automatic Logon at Startup ensures that the specified assistant is logged on when Analyst is launched. For security purposes, this should not be Supervisor.

The **Till Totals** box contains the next Lift number for this terminal. This should not be altered unless instructed to by the CareDesk. If this number is reduced, the new number entered will be honoured, but will overwrite the details of the previous lifts with the same number.

Default Case-Order Rounding defines the method of rounding to be used in this feature. The threshold field becomes available if the "Use Threshold" option is selected from the menu.

The **Automatic Order Completion** option allows sent orders to be either automatically accepted or cancelled after the specified number of days. The Mode box selects whether the orders will be accepted to update the stock as though all items have been delivered or will be cancelled as though no stock has been delivered. NOTE: Use this feature with caution as stock levels of items will go awry quickly when active.

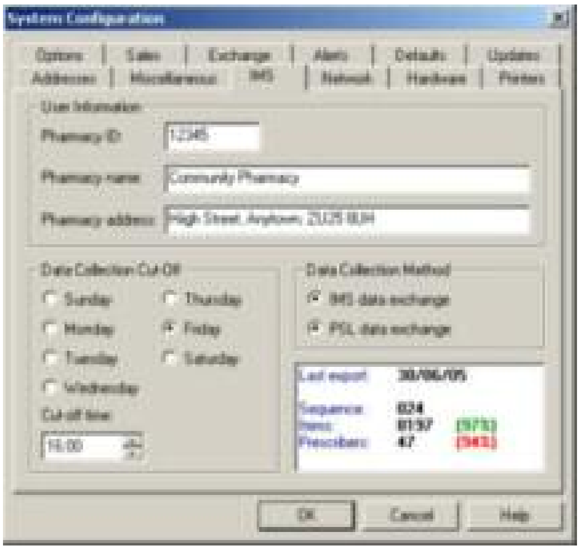
The **Retain Complete Orders** option allows completed history to be displayed for however many days are specified here after which time they are hidden to prevent the purchases screen becoming cluttered. Orders are not deleted or removed from the system when they exceed this number of days, they are simply not displayed. This can be modified at any time and after refreshing the purchases screen all orders completed within the new number of days are displayed. Enter 0 (zero) in this field for all completed orders to be hidden from view.

The **Automatic End Sale time out** allows the PoS terminals to automatically return to the Previous Sales screen if no activity is detected in a blank New Sale screen after the amount of time specified in this field. This closes another security loophole left by an assistant leaving the till in this screen or by using the Continuous Sales Mode. If your security settings are set to log off the assistant at the end of sale, this is honoured when the system automatically ends the sale.

The **Report Description Truncation** option defines the default description truncation for all standard grid style reports. These are explained in Truncating Long Descriptions and can be overridden in each report by using the Report Options.

IMS Tab

This tab will only be displayed in systems which collate and sent their PMR dispensing information to IMS.



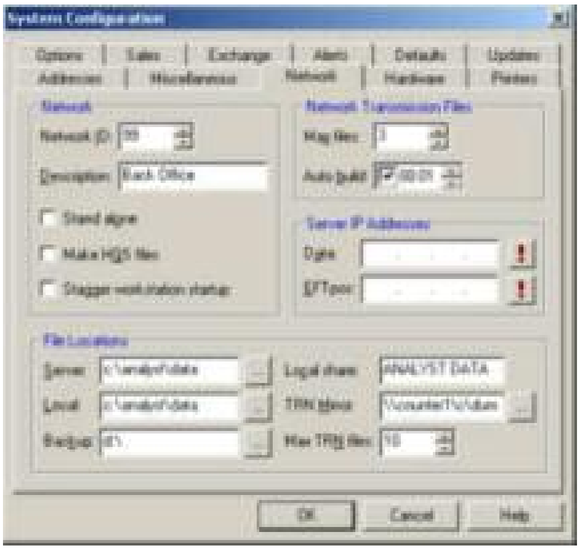
The Pharmacy ID, name and address are at the top of the tab. This will be setup initially and should not be changed unless under instruction from the CareDesk or IMS. The cut-off time is specified in the bottom left panel and defines the start/end of the week for data purposes. On the right the two methods of data exchange displayed for selection. This will normally be PSL data exchange.

The information pane on the bottom right displays a summary of the last export of data for IMS. The date and sequence number identify the export and when it was performed. The item count is the number of items which were linked to prescribers and the percentage of the total number of items that represents. The prescriber count is the number of prescribers linked to a surgery with a full address and the percentage of all prescribers that represents. Items not linked to a prescriber and prescribers not linked to a surgery are not useful to IMS. If the percentage of data is above the threshold prescribed by IMS it is displayed in green. If it has fallen below the threshold it is displayed in red. If in red the data is deemed of poor quality and is rejected. This will result in non payment from IMS.

Network Tab

This is the first of two tabs protected by a password. This window will display when you try and enter this tab.

Settings on this tab can have a significant impact on the operation of the terminal or system and are of a technical nature. Access is restricted to ensure that the settings are not accidentally or maliciously changed. The single-use password can be obtained from the CareDesk by quoting the access code displayed in the security window, but the advisor will need to know who you are and why you need access to this tab before generating the password for you. This is to protect you and your staff from any avoidable system failures. Depending on what you wish to do, the advisor will help you make the relevant changes to the settings.



In the **Network** box, the Network ID is the terminal number on the system. This must be unique on your system and generally follows the convention of your normal till numbers and 99 as the admin terminal if it is not a PoS terminal. Type in the **Description** of this terminal in reference to your shop e.g. 'Perfume counter', 'Dispensary' etc.

These options are only available on the master terminal. The **Stand alone** option should only be checked if the system is not connected to a network as selecting this option prevents any network broadcasts from this terminal. The **Make HQS files** option should only be selected if you are part of a group and only on one terminal. This option generates a file for head office when Analyst is launched on the terminal with this option selected. Use the **Stagger workstation startup** if you have 4 or more terminals on your system. This prevents the incomplete overnight restarts which occurs on larger systems.

The **Network Transmission Files** section configures the Network Transmission File (NTX) Manager. It is wise to store some NTX files in case of any problems, but they can be quite large. A compromise is to store around 3 files, but if you have plenty of capacity on your system this number can be increased. On the server/master terminal, the **Auto build** option should be selected and a time specified in 24 hour format. This time is usually overnight so if Analyst is left running, at the specified time this terminal will close Analyst around the system, build an NTX file and distribute it around the network. The **Auto build** option should not be selected if this terminal is not the server/master.

The **Server IP Addresses** fields are optional to complete, but is recommended. Enter the IP addresses of the servers you have in your system and press the **!** button to ping it. This terminal will ping the servers regularly and warn if there are any network problems before you rely on the network mid-sale.

The **File Locations** section specifies the network locations of the various files required by the system. The paths on the left can be typed in or can be browsed for by using the button adjacent to the fields. The **Server** path is where the system database is stored. It is crucial that all terminals on the system use exactly the same database. The **Local** path is where the local database is stored in case of network failure. The **Backup** path is where the backup files will be copied to when the Backup Databases option is selected from the Admin menu.

Use the **Local share** field if your terminals run on Windows XP. Enter the network share name assigned to the \Analyst\Data folder on this terminal. The **TRN Mirror** allows a duplicate the raw transaction files to be located elsewhere on the system in addition to the local hard drive so that in the event of a system failure, no data will be lost. Type in the network path or use the browse button to specify the location for these files. The **Max TRN files** determines how many day's worth of raw transaction files are stored. It is recommended to have this set fairly high, around 30-50, as they are extremely small and in the event of disaster can be very useful.

SMS Tab

This tab holds the details of the SMS account and automatic texting options. In addition to the settings on this tab there are several other pre-requisites for sending patient's text messages. These are an in-credit account with CSoft, the patient's consent for you to send them messages and their mobile phone number.

Miscellaneous

Send SMS text messages using NHS Mail

Systems connected to the internet on an N3 connection can use an NHS mail address to send SMS messages. This is free to use but is only for care based messages, not marketing messages of a commercial nature. The connection details are stored on the Email tab. (Default setting: OFF) [Global]

Auto-start Comms Manager on this workstation

Communications Manager is a background application which looks after sending SMS messages and emails. It must run on only one terminal on the network which has a connection to the internet. (Default setting: OFF) [Local]

Medication collection text messages
This determines when the SMS is sent during the dispensing session. (Default Setting: Do not send text messages) [Global]
MUR appointment reminder text messages
and the second section determines the interval (minus two weeks) for an MUR reminder text. Selecting the 12 month option will schedule an SMS two weeks before the one year anniversary of the patient's last MUR. (Default Setting: Do not send text messages) [Global]

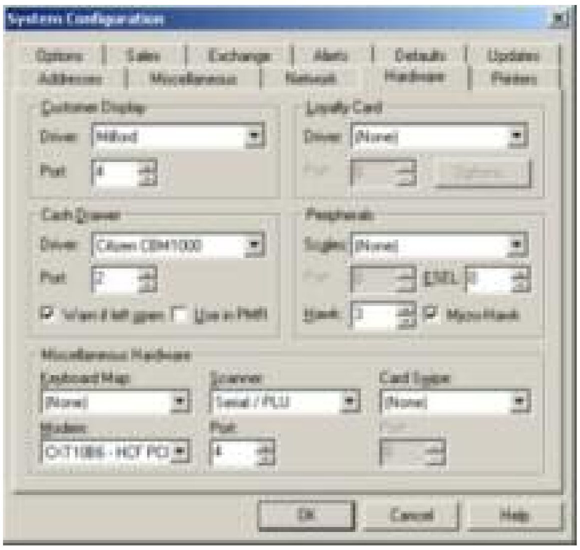
Message Relay Centre Account
If there is no NHS Mail account which can be used of the messages you intend to send are of a commercial nature Analyst can be setup to use a relay centre to send the messages.

The details at the bottom of the dialogue allow entry of the login details for the CSoft website which is responsible for sending the messages. When correct the account balance is displayed at the bottom left. Click on the blue hyperlink to visit the website to either sign up for a new account or to top-up the existing one.

Hardware Tab

This is the second tab protected by a password. This window will display when you try and enter this tab.

Settings on this tab can have a significant impact on the operation of the terminal or system and are of a technical nature. Access is restricted to ensure that the settings are not accidentally or maliciously changed. The single-use password can be obtained from the CareDesk by quoting the access code displayed in the security window, but the advisor will need to know who you are and why you need access to this tab before generating the password for you. This is to protect you and your staff from any avoidable system failures. Depending on what you wish to do, the advisor will help you make the relevant changes to the settings.



These settings relate to the peripherals which are connected to this terminal and will be set by your installer, engineer or trainer. Most of the settings require the selection of the correct driver and port number that the peripheral is connected to. The combination of terminals and peripherals is almost endless so will not be laboured in this guide.

If you have any reason to doubt that your peripherals are not functioning correctly, call the CareDesk who will determine the correct configuration settings for your combination terminal and peripherals.

Printers Tab

The final tab on the system configuration is the printers tab and is common across the whole Analyst suite of products. This configures the system for all your printers with the exception of the PMR label printer which has a separate tab in the PMR System Configuration.

The **Receipt Printer** is the small printer specifically used for the production of receipts at the PoS. These are driven directly from Analyst so you must have one of the printers in the list. Select the Printer model and the port number it is attached to (or proxy name).

The **Label Printer** is used for producing shelf edge or product labels. Some self adhesive label rolls are available for some receipt printers which can operate in label mode. If you have one of these printers and the label rolls, select your printer model and port number. More commonly an A4 printer is used to produce self adhesive labels and shelf edge labels on perforated card. Select the printer name, which must have been added through windows and the label style. More about printing labels can be found here.

The Label sheets which are a standard Avery size and perforated card sheets are available from our Consumables Department on 01257 275800.

The **Invoice Printer** should be an A4 printer.

The **Slip Printer** is used for printing customer's cheques and/or endorsing prescriptions in the PMR.

The **Report Printer** should be an A4 printer as it is used for the printing of all reports, MAR forms, picking lists and transfer advice notes.

The **Statement Printer** should again be an A4 printer.

If the option **<Prompt when used>** is selected for any of the options, the Windows printing dialogue will appear for the printer to be selected when a print job is created.

PMR

PMR Options Explained

Below is a complete list of the options available in the Options tab of the System Configuration of Analyst PMR. Where the default settings are described as ON or OFF, ON indicates a tick in the box for the option, OFF indicates a blank box for the option. Local settings are specific to the terminal on which the change is made where a Global setting will affect the entire system.

Dispensing

Enable continuous dispensing mode

With this option enabled the patient search dialogue will appear immediately after ending a session. This can speed up the dispensing rate by removing the need to click the **Search** button at the start of each session. If a new session is not required the search dialogue can easily be dismissed to access the other functions of the system. (Default setting: ON) [Global]

Enable quick dispensing mode

The quick dispensing mode allows items to be dispensed to a patient who is not and will not be stored permanently in Analyst. This method if dispensing is only suitable for shops in areas with many transient visitors, such as tourist resorts. By enabling this setting the **Quick** button on the previous sessions screen illuminates and is available for use. (Default setting: ON) [Global]

Warn if repeating drug already dispensed today

A warning will appear on screen if the same drug or item from a patient's history is repeated more than once in a single day. (Default setting: ON) [Global]

Warn if repeating a drug for which the description has changed

A warning will appear on screen if the description for a drug has changed since last dispensed to a patient and the repeat function is used. The description on the label and in the new entry in the history will always be the new description. This warning can act as a prompt to point out the change to the patient to avoid any confusion on their part. (Default setting: ON) [Global]

Warn if repeating a partially dispensed or previously owed drug

A warning will appear on screen if an item is repeated where the prescribed quantity and dispensed quantity differ. The quantity displayed on the history screen is amount dispensed, but repeats use the quantity prescribed which can lead to errors if not noticed. (Default setting: ON) [Global]

Repeat quantity originally prescribed, rather than actually dispensed

When repeating an item in the dispensing history which was not completely dispensed, with this option selected the quantity repeated will be the prescribed amount. If this option is not selected then the quantity that was actually dispensed will be inferred as both the prescribed and dispensed quantity for the new line. (Default setting: ON) [Global]

Repeat Private script items as Private script items

If a repeat is performed on a private script in the patient's history the script type will default to 'Private' for the repeat if this option is ticked. (Default setting: ON) [Global]

Infer patient conditions from dispensed drugs

Most of the drugs in the database are associated with a condition or number conditions. By activating this option a list of possible conditions the patient may be suffering from appears. By counselling the patient it can be determined which conditions they are and are not suffering from. These responses are held in their record and can be used to highlight any adverse drug reactions which may arise by dispensing medication unsuitable for patients with certain conditions and to provide a generally higher standard of care through a better understanding of their situation. (Default setting: ON) [Global]

Warn when dispensed quantity exceeds prescribed quantity

A warning will appear if the dispensed quantity in the drug quantity dialogue is greater than that prescribed. (Default setting: ON) [Global]

Preset dispensed quantity to one original pack

This time saving option pre-enters the pack size into the quantity dialogue when dispensing. It is also the focus of the screen and can be changed simply by typing in the desired amount. (Default setting: ON) [Global]

Round to nearest calendar pack size

By selecting this option calendar packs are deemed un-splittable and any quantity entered for them will be rounded to the nearest full pack size. (Default setting: ON) [Global]

Automatically combine small pack split remainders

Without this option selected Analyst will print a dispensing label for each pack and each part pack dispensed to a patient. This is inconvenient though if there are only a few tablets/caps left over from a pack and the remainder are frequently placed in the box with a full pack and the quantity on the label reflects this by using the **Combine** button on the drug quantity dialogue. If this practice is commonplace this option can be selected and where the remainder of a pack is less than one third of a full pack it is automatically combined with a full pack. (Default setting: ON) [Global]

Include deleted items in history

This option displays deleted activity in the patient history pane. The deleted items are clearly marked and no editing or repeating of them can be performed. (Default setting: OFF) [Global]

Warn if dispensing to an exempt patient

A warning will appear when a patient marked as exempt is identified and prompts to check that parts 1 and 3 are correctly completed as failure to do so will result in a reduction in payment to the pharmacy. (Default setting: ON) [Global]

Warn when dispensing a controlled drug
A warning will appear when a drug marked as a 'controlled drug' is dispensed. (Default setting: ON) [Global]

Expand current drug when Return key pressed

The details of the highlighted drug are displayed in the product editor when the return key is pressed in the dispensing screen with this option selected. (Default setting: ON) [Global]

Warn when dispensing a Select List Scheme drug

A warning will appear if an SLS drug is dispensed. Ensure that the script is marked as 'SLS' otherwise remuneration will not be received. (Default setting: ON) [Global]

Warn when dispensing a drug with multiple charges

A warning will appear when a drug is dispensed which attracts more than the standard single NHS fee from the patient. (Default setting: ON) [Global]

Warn if dispensing the wrong drug for a generic prescription

A warning is displayed if a non-compliant drug is dispensed. (Default setting: ON) [Global]

Warn when creating an Owing for a drug set for manual re-ordering

A warning will appear if an owing is created for a drug which is set for manual re-ordering.

Automatically generate owings when there is insufficient free stock

When this option is turned on, if an item is has a counted positive stock level an owings will automatically be generated if the prescribed amount exceeds the stock level minus other owings. (Default setting: OFF) [Global]

Annotate patient notes when prescription charges exemption expires

When a patient becomes liable to pay for their prescriptions by virtue of an exemption reason expiring, an explanation is placed in the Notes box of their patient record. (Default setting: ON) [Global]

Move outstanding owings to top of PMR history when dispensing

With this option selected all outstanding owings for a patient float to the top of the list of the patient's dispensing history. (Default setting: OFF) [Global]

Confirm identity of prescriber for private prescriptions

Following confirmation that a script is private Analyst will prompt to confirm who prescribed it. The patient's registered GP is highlighted by default with other prescribers in the same practice listed beneath. This helps keep the details in the prescription book complete and accurate. (Default setting: ON) [Global]

Base default private script fee on cost price, rather than tariff price

The suggested price of a private script ill be based on the system's cost price of the dispensed item rather than the Drug Tariff price. While this will more accurately maintain the required margin if the cost price is correct, the Tariff price is more reliably updated. (Default setting: OFF) [Global]

Warn after dispensing if there are more scripts for the same patient

Once a script has been completed for a patient Analyst will prompt if another script for the same patient is ready for dispense on the script queue. Turning this option off will suspend the check for extra scripts. (Default setting: ON) [Global]

Remind about bags and wipes when qualifying appliances dispensed

All appliances which should be issued with bags and wipes are flagged within Analyst so a reminder will appear when they are issued. Remove the tick in this option to prevent this message from appearing.

Labels

Automatically print label after dispensing new drug

The labels will print immediately after dispensing an item rather than printing all labels at the end of the session. (Default setting: ON) [Global]

Automatically print patient label after dispensing

The patient label contains the name and address details of the patient and it is intended to be attached to a Patient ID Card. A label will only be printed for a patient if one has not already been printed, stored on the Notes Tab of the Patient Editor 'Patient label printed'. (Default setting: OFF) [Global]

Print patient ID on drug labels

The unique patient number is printed on the drug labels and bag label. This will mean nothing to the patient but can resolve confusion for the pharmacy in the event of more than one patient with the same or very similar names. (Default setting: ON) [Global]

Print barcode on patient label

This option prints a barcode on the Patient ID Label which can be scanned into the PMR to identify the patient rather than searching for them. (Default setting: ON) [Global]

Print barcode on Owings label

When the owings label is returned to the pharmacy for collection the barcode can be scanned to access the records immediately rather than having to search for the record manually. A scanner must be attached to the dispensing computer for this to be of use. (Default setting: ON) [Global]

Highlight loan items on drug label

If this option is selected an extra line on the label indicates this item is a "loan item". (Default setting: OFF) [Global]

Pad large-print drug reference label numbers with zeros

The large number label printed as part of the visual impairment options can be padded to 6 digits by adding leading zeros if required. (Default setting: OFF) [Global]

Print an extra label for drug forms listed below

Use this option in conjunction with the list of drug forms beneath to automatically print a second label for the specified drug forms when dispensing. Select this option to turn the option on universally for all dispensing. Alternatively select the similar option contained within the nursing home setup for just that specific nursing home.

Extra label drug forms

Double click this section to open the list of various drug forms which are contained within Analyst. These are things like inhalers, creams, ointments, tablets, capsules, etc. and are used to specify which types of things you'd like a second label for.

Bag Labels

Automatically print bag labels after dispensing

A 'bag label' will be printed for the patient at the end of the session. A bag label contains the patient's name, address and optionally the number of items in the bag and their phone number. (Default setting: OFF) [Global]

Print barcode on bag labels to scan when drugs handed to patient

The barcode can optionally be printed on the bag label. This can be scanned to confirm that the bag has been handed to the patient or their representative. When this option is selected an extra column will be displayed in the Script Queue, Dispensing screen and on the drug history tab of the patient editor to hold an icon which will appear when the barcode has been scanned. (Default setting: ON) [Global]

Print patient phone number on bag labels

Prints the patient's phone number on the bag label if one is listed in the patient's record. (Default setting: ON) [Global]

Print number of packs on bag label

Prints the number of items or packs which have been dispensed in the session on the bag label. If the prescription for an item has been split into a number of drug packs the number of items reflects the number of separate packs that are in the bag. (Default setting: ON) [Global]

Print total charge on bag labels

This option calculates the total charge for a patient's script from the dispensed items and their exemption status and prints it onto the bag label. Analyst calculates the number of charges depending on the items dispensed and uses the price stored on the Miscellaneous Tab of the system configuration to calculate the total charge. (Default setting: OFF) [Global]

PMR Label Cutting

If your label printer is fitted with a cutter, quite when it will cut the labels will depend on your preferences. Select one of the following options: (Default setting: CUT AFTER EACH DRUG) [Global]

- Never cut labels.
- Cut after each label.
- Cut after each drug. This will leave all labels for the same item on the script attached.
- Cut after each dispensing session. This will leave all labels for the same session attached.

Assorted flavours

Defines how labels print when dispensing items through an assorted flavours header. (Default setting: PRINT ONE LABEL FOR EACH FLAVOUR DISPENSED) [Global]

- Print one label for each flavour dispensed
- Print a single 'assorted flavours' label

Assorted flavours owings

Defines how labels print for owings generated through an assorted flavours header. (Default setting: PRINT ONE LABEL FOR EACH FLAVOUR OWED) [Global]

- Print one label for each flavour owed
- Print a single 'assorted flavours' Owings label

Responsible Pharmacist absence

Sales of P, POM and GSL items

The use of Analyst's responsible pharmacist feature can be used to warn or forbid the sale of P, POM and/or GSL items according to the regulations or Analysts long standing Sale Restrictions can be used instead. If restrictions have been setup and successfully used before they can be extended to account for the presence of an RP. Otherwise opt for the Warn or forbid options.

Dispensing prescribed medication

Depending on whether or not an RP is present, the dispense, repeating and amendment of a patient's medication can be permitted, warned about or forbidden.

Handing out dispensed prescriptions

Depending on whether or not an RP is present, the handing out of a patient's medication (by scanning the bag label or through the Managed Repeats section) can be permitted, warned about or forbidden.

Delivering dispensing prescriptions

Depending on whether or not an RP is present, the delivery of a patient's medication (as part of Managed Repeats) can be permitted, warned about or forbidden.

Repeating deactivated drugs

From time-to-time items which are not used very often may be made inactive to keep the system running smoothly. This will also mean that some items may appear as inactive in a patient's history and these options determine how to handle these items when a repeat of them is required. Select one of the following: (Default setting: DISPLAY WARNING) [Global]

- Repeat drug and reactivate product.
- Display warning before repeating and reactivating.
- Prevent repeating of deactivated drugs. An alternative item must be searched for.

Prescriber identification

Analyst has the ability to store who has prescribed each prescription but it is optional to turn it on. Select one from the following: (Default setting: NEVER PROMPT) [Global]

- Never prompt for doctor
- Always prompt for doctor
- Prompt if the patient has no assigned doctor. The prescriber will be marked as the assigned doctor unless manually changed.

BAN/rINN patient labels

Items which have changed names as a result of the standards shifting from BAN to rINN can optionally have an information label printed: (Default setting: PRINT LABEL FOR REPEATED DRUGS) [Global]

- Do not print name-change labels
- Always print name-change labels
- Print name-change label for repeated drugs

Description Search

Restrict to active products only

The search results will not include any inactive products. (Default setting: OFF) [Global]

Auto extend restricted searches if no matches

This option is only available in conjunction with either of the above to search restrictions. If no items match the search and are available from the default supplier the search can be 'auto-extended' removing the need for the user to click the **Extend** button. (Default setting: OFF) [Global]

PMR: Sort descriptions by cost price

In PMR searches generic items with the same name can be sorted to display in cost price order. (Default setting: OFF) [Global]

Display extended description panel

Part of the search results screen is taken up with a description panel at the bottom which shows the full description of the highlighted item in the list. This helps with items with very long descriptions. (Default setting: ON) [Global]

Show price in result list

Displays the item's retail price in a column on the results list. (Default setting: ON) [Global]

Show stock levels in result list

Displays the item's stock level in a column on the results list. (Default setting: ON) [Global]

Show hit code in result list

Displays the item's hit code in a column on the results list. (Default setting: OFF) [Global]

Use large font for result list

A larger font can make the result list easier to look though but more of the description fit on and more items will be displayed in the pane if the normal font is used. (Default setting: ON) [Global]

Limit to restricted products initially when dispensing

The search whilst dispensing is initially restricted to products available from the default daily supplier unless the **Extend** button is pressed. (Default setting: OFF) [Global]

Patient alerts at start of dispensing session

The patient alert will appear as a pop-up at the start of the dispensing session if any of the options below are selected and trigger the pop-up. If more than one option triggers the pop-up all warnings, notices and reminders are displayed in the same window, not separate ones. (Default setting: ON) [[Global]

Display 'information' patient alerts

A patient pop-up will appear as dispensing commences displaying comments recorded as 'information' in the patient alerts section of notes tab in patient editor. (Default setting: OFF) [Global]

Display 'warning' patient alerts

A patient pop-up will appear as dispensing commences displaying comments recorded as 'warning' in the patient alerts section of notes tab in patient editor. (Default setting: OFF) [Global]

Display 'stop' patient alerts

A patient pop-up will appear as dispensing commences displaying comments recorded as 'stop' in the patient alerts section of notes tab in patient editor. (Default setting: ON) [Global]

Display 'counselling' patient alerts

A patient pop-up will appear as dispensing commences displaying comments recorded as 'counselling' in the patient alerts section of notes tab in patient editor. (Default setting: OFF) [Global]

Display number of outstanding prescriptions requests

Displays how many requests for prescriptions have been generated with Analyst but have not yet been dispensed. (Default setting: ON) [Global]

Display number of ongoing repeatable prescriptions

Displays how many repeatable prescriptions are currently ongoing in the system.(Default setting: ON) [Global]

Display number of ongoing serial dispensing

Displays how many serial prescriptions are ongoing in the system. (Default setting: ON) [Global]

Display list of triggered patient flags

Triggered patient alerts will display in the patient pop-up. (Default setting: ON) [Global]

Display list of patient allergies

Confirmed allergies are displayed in the patient pop-up. (Default setting: ON) [Global]

Display list of known medical conditions

Medical conditions which have been confirmed positive by patients are displayed in the patient pop-up. (Default setting: ON) [Global]

Display list of recent care record events

A summary of any complaints, MURs, PSIs, sign posting, interventions and referrals are displayed. (Default setting: ON) [Global]

Remind about child-proof containers

If the patient has been flagged to receive child-proof containers this reminder will be displayed in the patient pop-up. (Default setting: ON) [Global]

Display a patient picture if available

Displays the main picture of the patient if one has been taken and specified in their patient record. (Default setting: ON) [Global]

Warn if patient has not been asked about Prescription Request Service

If the patient is flagged as 'not yet been asked' for the Prescription Request Service it will appear in the patient pop-up. There is a yes/no link which will update the patient record accordingly so they will not be asked again. (Default setting: OFF) [Global]

Warn if patient has not been asked about Delivery Service

If the patient is flagged as 'not yet been asked' for the Delivery Service it will appear in the patient pop-up. There is a yes/no link which will update the patient record accordingly so they will not be asked again. (Default setting: OFF) [Global]

Warn if patient has not been asked about SMS medication alerts

If the patient is still flagged as 'not yet asked' a warning will appear in the patient pop-up. There are two links on the pop-up to confirm that they are interested and to enter mobile phone number, and that they are not interested. In either case the patient record is flagged accordingly. (Default setting: OFF) [Global]

Play sound when patient alert dialogue appears

This option turns on a sound which will play when the patient pop-up appears. (Default setting: OFF) [Global]

Patient editor required fields

Certain fields in the patient editor can be set as required and if incomplete a warning will appear that the item is about to be saved without this vital information being completed. Select which fields are required from: Address, Card ID, CHI number, Date of birth, Doctor name, Email, NHS number, Postcode, Sex, Surgery name. (Default setting: all OFF) [Global]

Check field contents

This option determines when the system will check for the missing fields defined in the option above. This can be whenever an existing patient's details are saved, whenever a new patient's details are saved or whenever a patient is dispensed to. (Default setting: Whenever saving a new patient) [Global]

Repeatable prescriptions

Display patient picture, if available

Displays the main picture of the patient if one has been taken and specified in their patient record. (Default setting: ON) [Global]

Automatically advance to the next item after repeating each drug

At the start of the repeat dispensing session the items covered by the repeat instruction will float to the top of the list with the top item highlighted. With this option selected the highlight moves to the next item after the first one has been dispensed and allows for fast and seamless dispensing using only the keyboard. If this option is not selected the newly dispensed item will be highlighted. (Default setting: ON) [Global]

Warn user if they have not completed the pre-dispensing checklist

With this option selected a pop-up warning will appear if the pre-dispensing checklist has not been changed from the default of 'Not actioned'. (Default setting: ON) [Global]

Print barcoded label if patient not present for pre-dispensing checklist

This option enables the printing of a barcoded bag label if the option 'Patient not present' is selected in the pre-dispensing checklist. When the patient collects their medication and the pre-dispensing checklist questions are answered by them the barcode can be scanned to display the pre-dispensing checklist which can then be marked as 'Completed'. (Default setting: ON) [Global]

Offer to print patient reminder poster when final GPRD is dispensed

At the end of the session in which the final GPRD is dispensed a pop-up message will appear and offer to print a patient reminder poster. (Default setting: ON) [Global]

Prescription requests

Display patient picture if available

Displays the main picture of the patient if one has been taken and specified in their patient record. (Default setting: ON) [Global]

Show Prescription Manager after dispensing to registered patient

If a patient is registered for Prescription Requests the Prescription Manager will appear after any dispensing session for them with this option selected. If the Prescription Manager is not required at this stage then de-select this option. (Default setting: ON) [Global]

PMR history filtering

Filter PMR history using family of dispensed drugs

The PMR history filter will apply to all drugs in the same family with this option selected. This helps to remove duplicates of the same drug, but of different brands and clears the dispensing screen up further still. (Default setting: OFF) [Global]

Warn on repeat if filter is hiding alternative dose instructions

If the PMR history is filtered and the dose instructions of the most recent item does not match those dispensed previously when repeated a warning will appear if this option is selected. This provides an extra check for repeated items and helps prevent any errors carrying forward. (Default setting: ON) [Global]

Sort filtered list by drug name, rather than date dispensed

The filtered list will display ordered alphabetically rather than when it was last dispensed. (Default setting: OFF) [Global]

Automatic filtering

The PMR history can be filtered automatically for all patients or just for those in homes. Alternatively, the automatic filtering can be turned off. (Default setting: Do not automatically filter PMR history) [Global]

Script presentation dockets

Prompt if docket not scanned during dispensing session

A warning will appear at the end of the dispensing session if the script presentation barcode on a waiting times docket has not been scanned during the session if this option is selected. Only sessions which have had the script presentation code scanned can be tracked for the waiting times so this option is considered the method of turning the feature on permanently. (Default setting: OFF) [Global]

Print a second copy for the patient

Two copies of the waiting time dockets are printed if this option is selected. In addition to the various barcodes the docket number is printed on the ticket which might be useful for the patient to track their script. (Default setting: ON) [Global]

Auto print when NHS, Private or Exempt button used on EPoS

If this option is selected waiting time docket(s) are automatically printed if the NHS, Private or Exempt uncoded buttons are used to enter a script into Analyst at the point of sale. (Default setting: OFF) [Global]

Auto print when an ETP script token is entered

If this option is selected waiting time docket(s) are automatically printed when an ETP script token is entered either through by scanning or typing it in manually. (Default setting: OFF) [Global]

Allow checking barcodes to be scanned outside of Dispensing screen

The second barcode can be scanned on Analyst PMR without the need to expand into the dispensing screen for the session if this option is selected. Beware though: the dispensed items can not be compared to the items entered into Analyst unless the dispensing session is checked. (Default setting: OFF) [Global]

Allow checking barcodes to be scanned on EPOS workstations

The second barcode can be scanned on any Analyst PoS terminal if this option is selected. Beware though: the dispensed items can not be compared to the items entered into Analyst unless the dispensing session is checked. (Default setting: OFF) [Global]

Print patient name on EPOS-generated dockets

This will print the name of the patient onto the script docket if the docket was generated on a PoS terminal. (Default setting: ON) [Global]

Print patient address on EPOS-generated dockets

This will print the address of the patient onto the script docket if the docket was generated on a PoS terminal. (Default setting: OFF) [Global]

Ask if patient is waiting before printing docket

This option, if selected, provides the on-screen options to mark the patient as either waiting in the store for the script to be ready, returning when it will be ready or would prefer to have the script delivered. (Default setting: OFF) [Global]

Show docket numbers on Script Queue screen

If this option is selected an extra column is added to the Script Queue screen to display the docket number of the session. (default setting: OFF) [Global]

Serial dispensing

Print all drug labels from the outset

With this option selected the 'Print all drug labels on first instalment' option on the dispensing schedule dialogue will default to be ticked. (Default setting: OFF) [Global]

Dispense first instalment at time of entering schedule

The label for the first instalment in the course of treatment will be printed once the a new schedule has been entered if this option is selected. (Default setting: ON) [Global]

Recalculate schedule as dispensing dates change

With this option selected the 'Recalculate schedule as dispensing dates change' option on the dispensing schedule dialogue will default to be ticked. (Default setting: ON) [Global]

Issue combined dose on days before pharmacy will be closed

Using the days specified in the dispensing days below the schedule will automatically adjust the dose of medication on days before the pharmacy will be closed. (Default setting: ON) [Global]

Warn after dispensing if pharmacy closed when next instalment due

When this option is selected an warning will appear at the end of the dispensing session if the next scheduled instalment for the patient falls on a day the pharmacy is normally closed. (Default setting: ON) [Global]

Warn if dispensing in advance for days when pharmacy closed

A warning will appear if an advance dispensed covers a period when the pharmacy is normally closed. (Default setting: ON) [Global]

Schedule instalments over 7 days, rather than 14

This option will set the default dispensing schedule period to 7 days and will grey out days 8 to 14 in the schedule. These can be accessed by clicking the '14 days' button. (Default setting: OFF) [Global]

Warn if any instalments have not been collected

If a patient has missed any instalments of their medication a warning will appear at each subsequent issue of medication. (Default setting: ON) [Global]

Display patient picture, if available

Displays the main picture of the patient if one has been taken and specified in their patient record. (Default setting: ON) [Global]

Record level of patient supervision

Allows the level of supervision to be recorded by producing a pop-up to select whether the patient was supervised, not supervised or part supervised. (Default setting: ON) [Global]

Dispensing days

Define here the days you will be dispensing the serial medication. This forms the basis of the dispensing schedule dialogue, though each schedule can be changed on a per person basis so there is no need to change this for every bank holiday. (Default setting: All ON except Sunday) [Global]

PMR label dispensing check barcodes

Automatically close Dispensing Check dialogue after valid match

With this option selected, once a valid match has been scanned the Dispensing Check dialogue will close after 5 seconds unless the **Close** button is clicked sooner. If not selected the Dispensing Check dialogue remains until the **Close** button is clicked. (Default setting: ON) [Global]

Accept drugs in same family as the drug on the label

Analyst will accept a match between labels and drugs within the same drug family. Useful if you do not always select or dispense exactly the same manufacturer of drugs. (Default setting: OFF) [Global]

Accompany warning messages with sound

If two different patients' labels are scanned successively the warning will be accompanied by a distinctive sound. (Default setting: ON) [Global]

Accompany error messages with sound

Any matches that give rise to an error will be accompanied by a distinctive sound. (Default setting: ON) [Global]

Confirm valid matches with sound

Valid matches will be accompanied by a distinctive sound. (Default setting: ON) [Global]

Display patient picture, if available

Displays the main picture of the patient if one has been taken and specified in their patient record. (Default setting: ON) [Global]

Robot

These options only appear on systems which are connected to a robot dispensing unit.

Use robot when dispensing on this workstation

This workstation will dispense using a robot if this option is selected. (Default setting: OFF) [Global]

If supported by robot, label drugs when dispensed on this workstation

If your robot has an integrated labeling unit, Analyst will request the robot labels line it dispenses from this terminal if this option is selected. Non robot lines will still have labels printed locally by Analyst. (Default setting: ON) [Local]

Warn when drug labels produced locally, instead of by robot

If labels are produced locally at the dispensed terminal rather than by the robot, Analyst will pop a warning with this option selected. (Default setting: ON) [Global]

Highlight items in PMR that were dispensed from robot

With this option selected the items which have been dispensed by the robot are highlighted in the patient's dispensing history with a robot icon in a column on the left of the item descriptions. (Default setting: ON) [Global]

Show robot stock level in non-dispensing description searches

This option displays the stock level of items in the robot when performing any description search of items in both the EPoS and PMR. If turned off the robot stock level is only displayed during a dispensing session. (Default setting: OFF) [Global]

Update robot stock level when queried in product editor

This option allows the robot stock level check from the product information panel on the details tab of the product editor to set the robot stock level in Analyst. Items which report zero stock will have the 'Robot line' status turned off and will no longer appear as a robot line in any searches or dispenses. If this option is off the stock level reported by the robot is purely for information, will not be stored in Analyst and will have no consequence on whether or not the item is considered a 'Robot line'. (Default setting: OFF) [Global]

Omit out of stock lines from Alternative Brands dialogue

Turn this option on to omit all lines which do not have any robot stock from the Alternative Brands Selection dialogue. (Default setting: OFF) [Global]

Warn when drugs withheld by robot because of assistant permissions

Analyst can be restrict the dispense of controlled drugs which might be held in the robot by each assistants' permission levels. If this option is selected a warning appears when a attempt to dispense has been thwarted for this reason. (Default setting: ON) [Global]

Automatically activates lines held in the robot

Analyst will active a line which is held in the robot whether or not it has been used if this option is selected. (Default setting: OFF) [Global]

Auto close Stock Check dialogue if sufficient stock for repeat dispense

This option removes the need to click the OK button if sufficient stock is found in the robot to perform a repeat dispense. If there insufficient stock then the quantity dialogue remains on screen to allow alternative brands to be selected. (Default setting: OFF) [Global]

Update local Analyst stock level on each robot stock update

The Analyst stock level will be tied to the robot stock and will be updated with each robot update if this option is selected. (Default setting: OFF) [Global]

DE Pharmaceuticals

Enable support for 'Best Product' service

Select this option if you are a DE Pharmaceuticals customer and with to participate in their 'Best Product' scheme.

Overwrite existing family substitutions where necessary

The Best Product scheme uses the Family Substitute facility. With this option selected the Best Product update will overwrite any existing user defined substitutions. The original substitution will be reinstated when the DE association ends. If this option is not selected the original substitution is preserved.

Pharmacy One

These options only appear on systems enabled for Unichem's Pharmacy One Scheme.

Activate products in Pharmacy One deal groups

As Analyst processes the Pharmacy One file, all items in the selected groups can be activated if this option is selected. This will help find those items in the scheme when dispensing. (Default setting: OFF) [Global]

Warn when dispensing non-deal group drug for branded prescription

If item which is not part of the current PharmacyOne deal is selected when the item was prescribed by brand a warning will appear inviting the user to reconsider their selection. (Default Setting: ON) [Global]

Warn when dispensing non-deal group drug for generically prescription

If item which is not part of the current PharmacyOne deal is selected when the item was prescribed by brand a warning will appear inviting the user to reconsider their selection. (Default Setting: ON) [Global]

Branded Deals

Select which one of the branded deals to use. (Default setting: None selected) [Global]

Parallel Import Deals

Select which one of the parallel import deals to use. (Default setting: None selected) [Global]

Generic Deals

Select which one of the generic deals to use. (Default setting: None selected) [Global]

Generic/Branded Deals

Select which one of the generic/branded deals to use. (Default setting: None selected) [Global]

Miscellaneous

Restrict doctor list to current surgery

When editing patients the list of doctors it is restricted to those practicing in the selected surgery. Select this option to list all doctors in the patient editor regardless of the surgery selected. (Default setting: OFF) [Global]

Show last name of doctor first in doctor/surgery lists

If doctors have been added to the system as 'Joe Bloggs' they will display in the doctor list under their first name unless this option is selected in which case they will be displayed as 'Bloggs, Joe'. This can make the task of assigning the correct doctor quicker. (Default setting: OFF) [Global]

Warn if full description changed while editing product details

This option provides a safety net for the full description which can all to easily be changed by accident when editing a product. (Default setting: ON) [Global]

Warn if surname or forenames changed while editing patient details

If details in the surname or forenames fields of the customer editor are changed whilst editing a patient a warning appears. This will help prevent loosing patient records by deleting accidentally their name. (Default setting: ON) [Global]

Show deceased and moved-away patients at the end of search results

This option sinks patients who have been flagged as deceased or moved-away (in the Notes tab of the Patient Editor) to the bottom of any search results in which they appear. Patients flagged as in hospital also sink with this option. (Default setting: OFF) [Global]

Show prescription charges on Script Queue screen

This option, if selected, adds a column on the right of the Script Queue screen which lists the number of paid and exempt items in a session. (Default setting: OFF) [Global]

Use version 2 MUR paperwork for new consultations

Uses the version 2 MUR paperwork, used in England, rather than the version 1, which is still used in Wales. (Default setting: ON) [Global]

Remove manufacturer details from drug interaction messages

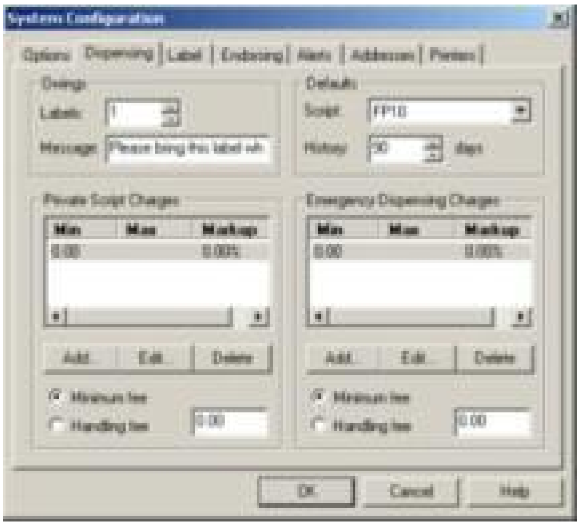
When interaction messages are displayed the manufacturer information and any special instructions, both held in brackets, are removed from the names of drugs contained in the message. This helps clean up the dialogue and make the message easier to read and understand. (Default setting: ON) [Global]

Include patient name in Google Maps and directions

When the location or directions button is clicked from the patient editor the patient's name is included in the title bar, search field and search results. While this data remains in the pharmacy we do not consider this a security risk. But if you disagree, or you intend to print the resulting map for use off-site then this option should be deselected. (Default setting: ON) [Global]

Dispensing Tab

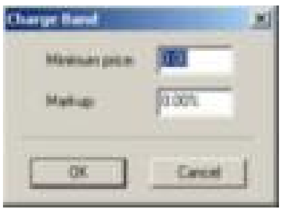
More dispensing options are displayed on this tab.



The number of **Owings** labels to be printed when an owing is generated is specified in the top left section along with the message to be printed on it. By default the message reads "Please bring this label when you return to collect your medicine" but it can be changed to read however you wish.

In the top right there are a couple of **Defaults** to select. The **Default Script** should be the most commonly processed script type. When you then receive other script types you can change from the default type during the dispensing session. The **Default History** determines how much of the patient's history is displayed during a dispensing session. Interaction checking will only operate on drugs that have been dispensed in this time period. Each customer also has their own history setting in the patient setup which overrides this setting on a per-patient basis. This can be used to view more or less of their medication history and check for interactions.

The **Private Script Charges** and **Emergency Dispensing Charges** are specified in the bottom portions of this tab. Both are configured in the same way but are quite separate. Press the **Add** button to create a new charge.



A new 'charge band' box appears. For a uniform fee structure, leave the minimum price at 0.00 and just enter the markup. To enter a new band type in a minimum price for the new band and the new markup level. The price entered is the cost price of the medication. If the cost enters a higher tier the whole cost is taken into account when applying the markup, not just the portion in the upper band.

The charge can also be subject to a **Minimum Fee** which is the least the customer will be charged, or a **Handling Fee** which will be charged in addition to any drug cost + markup.

Label Tab

The configuration of the printed drug label is found on this tab.

Select the printer model from the list in the top left, the label size you are using and the port the printer is attached to (or name if a proxy printer is selected).

The pane at the bottom displays what the label should look like and can be printed by clicking on the label image or by using the print button next to the label size field.

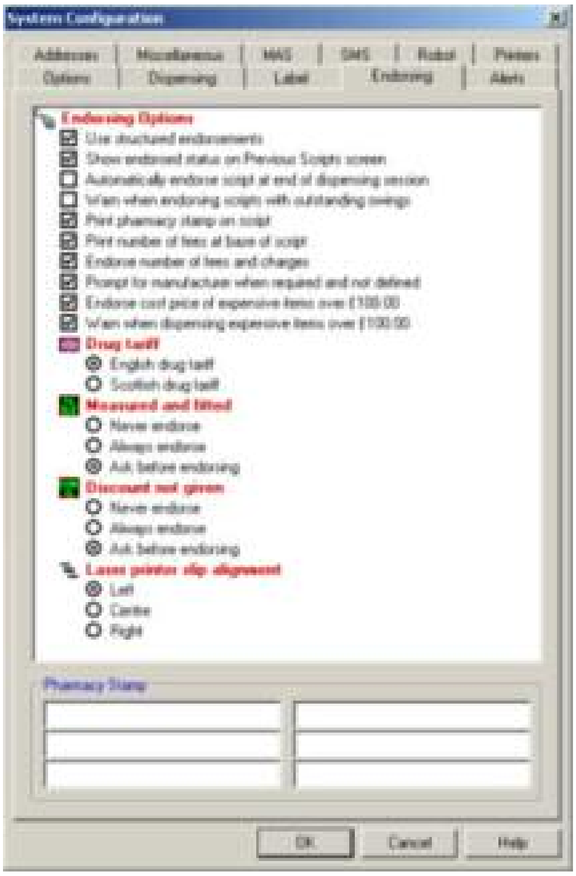
The print on the label will need lining up initially by using the **Fixed Text and Margins** section in the top right. There are 11 lines on the label unless the Star SCP700 9 line driver is selected. Your own fixed text can be printed on the label by select the line you wish to have the text on and typing it into the **Text** field.

If your labels have been pre-printed, select the lines the system should not use and check the **Pre-printed** box. After each change print a test label by clicking on the label preview to check your changes are correct.

The side margins can be affected for the whole label by entering the number of characters from the **Left** and **Right** edges the system should print.

Endorsing Tab

The details on this tab ensure that prescriptions are accurately and fairly endorsed. Most of the options are self-explanatory, but less obvious options are explained next to the image.



Endorsing Options Explained

Use structured endorsements

Allows endorsements on scripts after this option has been enabled to build endorsements up through selecting options in the Structured Endorsements section rather than relying on free type. (Default setting: OFF, except Scotland where ON and compulsory) [Global]

Show endorsed status on Script Queue screen

When selected an extra column will display on the Script Queue screen to indicate if a script does not require an endorsement or if it has been endorsed already. (Default setting: ON)

Automatically endorse script at end of dispensing session

When selected Analyst will request the script is placed in the endorsing printer for immediate endorsement. (Default setting: ON)

Warn when endorsing scripts with outstanding owings

When selected a warning will appear if any item on a script to be endorsed has any items owing to the patient. (Default setting: OFF)

Print pharmacy stamp on script

When selected the pharmacy details, taken from the Pharmacy stamp section at the bottom of the Endorsing tab will be printed in the appropriate space on the script. (Default setting: ON)

Print item count on script

When selected the number of items dispensed in the Analyst session corresponding to the script will be printed in the item count box on the script. Default setting: ON)

Endorse number of fees and charges

When selected Analyst will print a summary of the number of professional fees and patient charges at the foot of the endorsements. (Default setting: ON)

Prompt for manufacturer and required and not defined

Analyst knows when it should endorse the manufacturer of an item and we endeavour to include all manufacturers in the updates. But in the event where one is required for an item but one is not defined a list will appear for you to choose the manufacturer from. (Default setting: ON) [Global]

Endorse cost price of expensive items over £100

(Not relevant in Scotland) If the cost price of an item which is being dispensed is over £100 that cost price will endorse on the paper script and will be included in any electronic claim (if appropriate) if this option is selected. (Default setting: OFF) [Global]

Warn when dispensing expensive items over £100

(Not relevant in Scotland) If the cost price of a dispensed item is over £100 a warning will appear to keep the script separate if this option is selected. (Default setting: OFF) [Global]

Drug tariff

Select the appropriate Drug Tariff for Analyst to use depending on your location. (Default setting: ENGLISH)

Measured and fitted

Select how Analyst should endorse items which might require a measurement and fitting service. Always, never or ask before endorsing such items with 'MF'. (Default setting: ASK BEFORE ENDORSING)

Discount not given

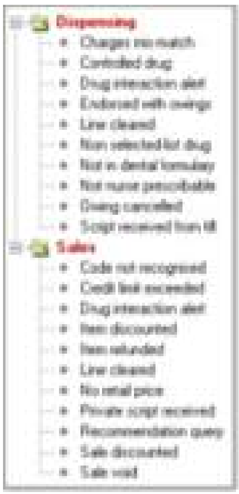
Dispensed items where no discount was given should only be endorsed as such if no discount was received from the supplier or manufacturer. Analyst can be set to always endorse, never endorse or ask before endorsing discountable items depending on the terms you have with your suppliers. (Default setting: ASK BEFORE ENDORSING)

Laser slip alignment

If a laser printer is used to endorse the prescriptions select which way the printer aligns the form in relation to the printing drum. (Default setting: LEFT)

Alerts Tab

Depending on the audio capabilities of your hardware, the system can play a sound or speak a phrase for various sales and dispensing events. A list of events appears on the right below.



To nominate a sound to be played, select the event in the pane on the left of the tab and set the **Local Action** on the top right as appropriate.

If **Play sound** is selected, you will be prompted to select a WAV file from your system. This can be tested by pressing the loudspeaker icon, or changed by pressing the Browse (**...**) button next to the name of the WAV file. You can select a file from any directory on your computer, including network directories on other computers. Analyst will create a local copy of the sound file on your system.

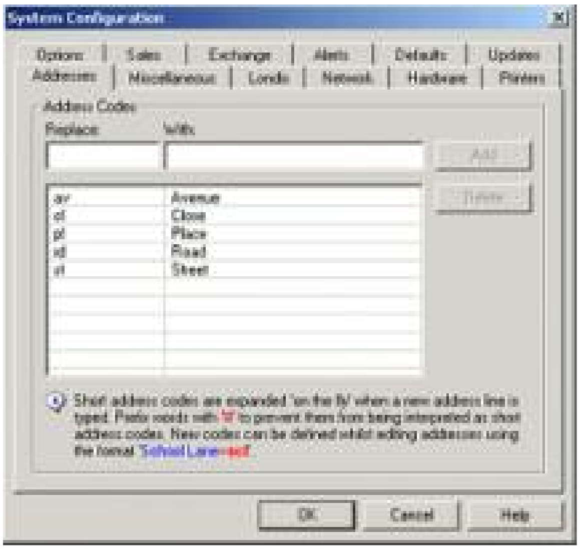
If you would prefer the system to speak a message to you, select the 'Speak Message' option and type the appropriate message in the field beneath. Press the Loudspeaker button to test it. You may need to spell your word or phrase phonetically to coax the system into pronouncing it correctly. This latter option requires the Microsoft Speech API to be installed on your computer. If the **Speak message** radio button is disabled on your system, contact the CareDesk for a copy of the install pack for this feature.

The volume can also be altered on this screen by using the slider, or muted altogether by checking the **Mute** box.

The **Event Monitor** feature is not currently used, but will be developed to broadcast sounds for these events across through the network in your shop to a client elsewhere in the building. Call the sales team on 01257 275800 if you would like more information on the potential of the Event Monitor.

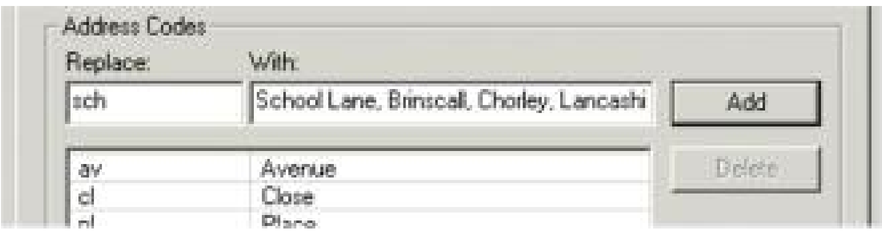
Addresses tab

Rather than typing in the same road and town names when entering new customers or patients into your system, shortcuts can be created to speed things up which are defined on this tab.



Some common options are set up already. To create a new one type in the abbreviation in the **Replace** field and the full text in the **With** field. Press the **Add** button to add the replacement to the list below.
For example " sch" when typed in the address screen could be replaced with "School Lane".

This can replace one or many lines of the address. To replace more than one line separate each address line with a comma in the **With** field. There is only one School Lane in Brinscall so " sch" could be replaced with the full address by typing "School Lane, Brinscall, Chorley, Lancashire, PR6 8QP" in the **With** field.



Using Address Short Codes
When entering an address in the customer/patient record, type in their house number then the short code.

Each address line can contain any number of address short codes, which Analyst will expand when the field is exited, by pressing **Tab**, or clicking on another field.

Adding Short Codes in the Address Screen

Address short codes can be added without the need to go into the System Configuration. For a single address line short code, type the address line in as normal and add your preferred short code prefixed by '='. For example to create a short code for Park Avenue, type "101 Park Avenue=pkav". As the next field is highlighted, the '= pkav' is removed from the display but added to the short code index. Now "103 pkav" can be used to add their neighbours. Analyst automatically removes any numbers at the start of replacement text entered in this way, since not everyone will live at number 101.

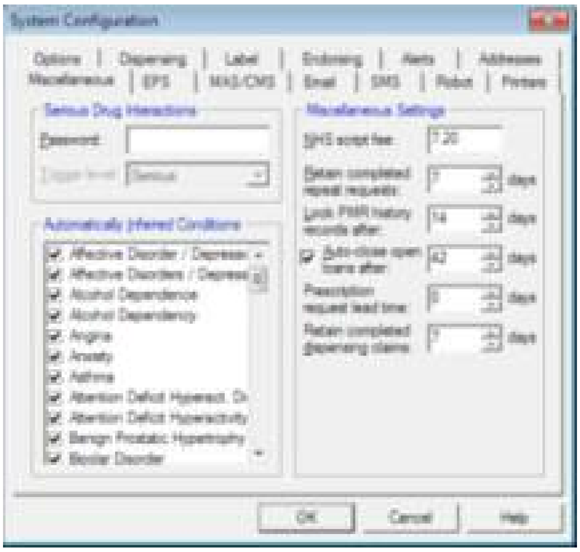
These are then added to the addresses tab of the system configuration and can be edited as normal if required.

Postcode Lookup

The system can also make use of the postcodes in your system as they accumulate to speed up entering addresses. This is covered in the New Customers topic.

PMR Miscellaneous Tab

Miscellaneous options within the PMR are contained on this tab.



Serious Drug Interactions can be set to require a password to dismiss the warnings by typing the password in this field. If this is left blank no password is required. Once a password has been entered select the level at which password entry becomes necessary. In the event of a locum not knowing the password, the Daily Password from the CareDesk will suffice.

The **Automatically Inferred Conditions** section determines which conditions, as you would expect, are automatically inferred by Analyst whilst dispensing when the feature is enabled. Remove the ticks next to the conditions which should not be inferred.

Enter the current **NHS script fee** in the box at the top right. This can be used to print the appropriate charge for the script on the bag label. This price is linked to the price used for the NHS Script Fee Uncoded Button in the PoS, so if it has been changed there it will already be correct. Or vice versa.

The **Retain completed repeat requests** option is used keep completed repeats displayed on screen for the number of days specified here. Set this to '0' (zero) if you wish them to disappear immediately when complete. They are not removed from the system, simply hidden from view.

By default the PMR history is locked from being edited once it is two weeks old. This can be changed in the **Lock PMR History records after:** field by changing the limit at which the history becomes locked. This can be set to a maximum of six months (180 days).

Open Loans can be automatically closed after the specified amount of time if required. Place a tick in the check box and specify the number of days loans should remain open for before being automatically closed.

Prescription request lead time is the number of days it will take for you to process a repeat request and added to the prescriber's repeat lead time to estimate the time when a requested repeat might be ready for collection. This can be set in increments of half days.

Retain completed dispensing claims limits the number of days an electronic claim remains visible in the AMS/CMS/EPS Release 2 claim screen.

ETP/AMS Tab

This tab contains various settings which relate to the Electronic Prescription Services: Electronic Transfer of Prescriptions (ETP) in England and Wales and the Acute Medication Service in Scotland.

The options in the top pane are explained below in detail.

The options at the bottom of the window provides Analyst with the addresses and port numbers of the ETP Manager and ETP Gateway. The ETP Manager is the Analyst device which handles and encrypts communications between the Analyst terminals and the ETP Gateway and usually runs on a terminal in your pharmacy. The ETP Gateway controls and further encrypts the data flow between ETP Manager and the Spine and usually runs at a third party premises whose responsibility it is to maintain this link. Once these addresses are entered and tested they should not be changed again unless under the advice of the CareDesk.

Dispensing

Display script details at start of dispensing session

Where available the script details are displayed in a separate window for review at the start of a dispensing session if this option is selected. (Default: On) [Global]

Automatically advance to next item after dispensing each drug

When dispensing a script with more than one ETP item the highlighted item in the list will move down as the previous item is dispensed. This makes dispensing quicker and easier as long as the items are dealt with in the order they are displayed. Items can be scanned and matched whether this option is selected or not. (Default: Off) [Global]

Patient Matching

Allow matching patient record on NHS/CHI number alone

When a match is found between the Analyst record and the details on the Spine the patient's name and address can used to confirm the match in addition to the NHS or CHI number (depending on whether you're in England, Wales or Scotland). This can be restricted to use only the NHS/CHI number if the information in your system is accurate and the previous method suggests other erroneous matches. (Default: Off) [Global]

Ask before updating patient record with Spine details

When selected a warning will appear when the details held on the Spine for the matched patient are different from those held in Analyst. Otherwise the details will be updated to match the Spine automatically. (Default: On) [Global]

Update patient record with the name details from Spine

This will update the name of the matched patient with that held on the Spine. (Default: On) [Global]

Update patient record with the address details from Spine

This will update the address of the matched patient with that held on the Spine. (Default: On) [Global]

Workflow

Include all undispensed prescriptions on today's Script Queue screen

With this option set all undispensed prescriptions from previous days will appear at the top of today's Script Queue screen.

Periodically warn if scripts have not been released from the Spine

If selected a warning will appear to warn that the Spine is not releasing scripts. If this persists you may need to check your connection to the Spine is intact. (Default: On) [Global]

Present dose instructions for review and possible amendment

If selected the dose instructions will appear during the dispensing routine. The dose entered by the prescriber will appear by default but can be modified if required. (Default: OFF) [Global]

Use this workstation to download scripts scanned at Point of Sale

In order for scripts which are scanned at the till to be downloaded one of the terminals in the dispensary needs to be nominated to download it. (Default: Off) [Local - Only one option permitted per system]]

Enter patient declaration when AMS token scanned during sale

With this option selected the patient declaration dialogue will appear on the EPOS when an AMS token is scanned. If it is not appropriate for this to show on the EPOS leave it blank. (Default: ON) [Global]

Enter patient declaration when AMS token scanned in PMR

With this option selected the patient declaration dialogue will appear on the PMR when an AMS token is scanned. If it is not appropriate for this to show on the PMR leave it blank. (Default: OFF) [Global]

Assume patient declaration completed when prompting in EPOS

In order to speed up the entry of scripts it can be assumed that patients who present their scripts at an EPOS terminal will have had their exemption declaration checked by an assistant there. The tick can be removed for those scripts which have not been checked. (Default: ON) [Global]

Assume patient declaration completed when prompting in PMR

In order to speed up the entry of scripts it can be assumed that patients who present their scripts at a PMR terminal will have had their exemption declaration checked by an assistant there. The tick can be removed for those scripts which have not been checked. (Default: OFF) [Global]

Assume exemption evidence seen when prompting in EPOS

It can be assumed that evidence of a patient's exemption status has been seen if the patient declaration dialogue displays on an EPOS terminal. (Default: ON) [Global]

Assume exemption evidence seen when prompting in PMR

It can be assumed that evidence of a patient's exemption status has been seen if the patient declaration dialogue displays on an EPOS terminal. (Default: OFF) [Global]

Submit AMS dispensing claim when endorsements are printed

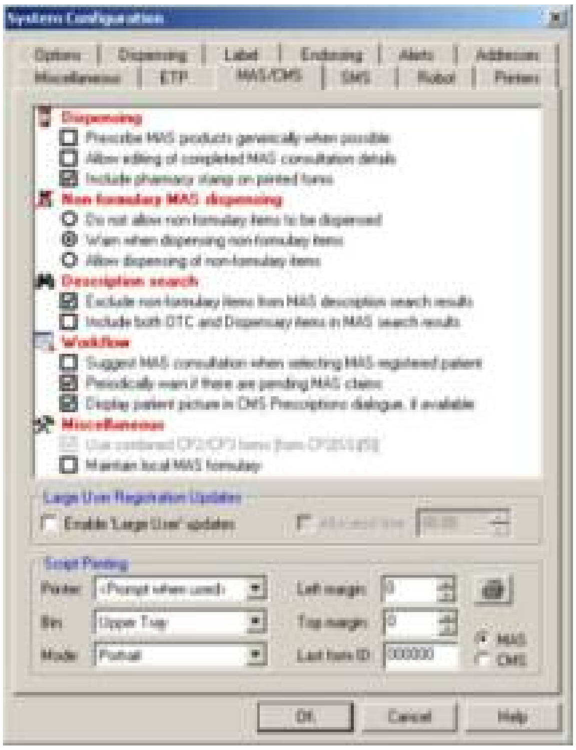
If this option is selected the electronic claim to the ePharmacy Store is sent when the GP10 is physically endorsed by clicking the Print button in the endorsements section. (Default: Off) [Global]

Show AMS dispensing claim status on Previous Scripts screen

An extra column down the left of the Previous Scripts screen will show the electronic claim status of each script if this option is selected. (Default: On) [Global]

MAS/CMS Tab

This tab contains various settings which relate to the Minor Ailments service (MAS) and the Chronic Medication Service (CMS). Some of the options on this page will only be relevant in Scotland and may only work if Analyst is configured for the NHSScotland Minor Ailments service.



The options in the top pane are explained in detail below.

The options beneath the pane are the printing options associated with either the CP2 for MAS or the CP3 for CMS registration/withdrawal. Switch between the settings for the two forms by using the option at the bottom right.

On the left select the printer which stores the blank CP2s, which bin they are in if it is a multi-bin printer and which way round the orientation of the paper is. Use the small printer button to perform a test print and check whether the test marks are aligned with the CP2 by holding both sheets up to the light. The printed image can be moved to the left and right by placing the number of millimetres to be moved in the Left Margin field (-ve numbers move the image left, +ve move the image right). A similar operation can be performed to move the image up or down on the page by using the Top Margin field (-ve numbers move the image up, +ve numbers move the image down).

All CP2 forms are numbers sequentially and the last number printed is displayed here. This can be changed manually, though ordinarily shouldn't unless a backup has been restored or an engineer has performed a action such as a HDD swap which may have caused to the number to change. Locate the last CP2 to be printed and type in characters 7 to 12 inclusive into this field to resume the sequential numbering.
Large User Updates

Dispensing

Prescribe products generically where possible

This will print the generic family name on the CP2 wherever possible. This option should be used with caution until the database of products contains the manufacturer of all items. Until then the endorsement may be less complete with this option than by using the proprietary name. (Default setting: OFF)

Allow editing of completed consultations

When selected, certain aspects of a completed consultation may be edited. These include the notes which have been typed in. No information which was included in the report to the e-Pharmacy Store can be changed once completed though. (Default setting: OFF)

Include pharmacy stamp on printed forms

This will include the details of your pharmacy on the top right of the CP2 if you prefer not to stamp it yourself. (Default setting: ON)
Non-formulary MAS dispensing
This section decides how strict your system will be about dispensing lines which are not contained in the MAS formulary. It can be set to forbid, warn about or permit the dispense of such lines. (Default setting: Warn)
Description Search
Exclude non-formulary items from description search results

The restriction on non-MAS formulary items being displayed in the drug search results can be lifted by selecting this option. Items displayed in the unrestricted search results which are in the MAS formulary are displayed with a MAS icon next to them. Selection of an item not in the formulary will only be permitted if this option is selected. (Default setting: ON)

Include both OTC and dispensary items in search results

Most Analyst PMR systems are configured to display the dispensary search results by default which is not always appropriate for a MAS consultation. Select this option to display both the OTC and dispensary items as though the All button has been pressed. (Default setting: OFF)
Workflow
Suggest MAS consultation when selecting a MAS-registered patient

When searching for a patient as part of a normal dispensing session if they are registered for the MAS Analyst will pop-up the option to start a consultation rather than a regular session. This has the advantage of rolling this patient on the capitation report for 12 months from this consultation. (Default setting: OFF)

Periodically warn if there pending MAS claims

If there are claims which cannot be processed due the CHI numbers of involved patients not being known a warning can pop-up periodically to warn of them. This may be important as the CHI number may not be known and the claim cannot be processed. (Default setting: ON)

Display patient image CMS Prescriptions dialogue, if available

If a patient has an image associated with them it will be displayed in the CMS Prescription section. If there is no image, one can be added by clicking on the link. If this option is not selected the whole bottom area of the screen is used to display the details of the highlighted line. (default setting: ON)

Miscellaneous

Use combined CP2/CP3 forms [form CP2(SS)(5)]

Select this option if your system is not CMS enabled, but your paper stock has changed to the combined CP2/CP3 forms. When your system becomes CMS enabled this option is selected and greyed out. (Default setting: non-CMS systems- OFF; CMS enabled systems - ON)

Maintain local MAS formulary

Our data team maintain a MAS formulary based on criteria provided by the health boards by placing a tick in the MAS field of the appropriate products on the product's Drug Tab. If you would rather maintain your own list and opt out of our MAS updates select this option. Though this is strongly NOT recommended. (Default setting: OFF)

SMS Tab

This tab holds the details of the SMS account and automatic texting options. In addition to the settings on this tab there are several other pre-requisites for sending patient's text messages. These are an in-credit account with CSoft, the patient's consent for you to send them messages and their mobile phone number.

Miscellaneous

Send SMS text messages using NHS Mail

Systems connected to the internet on an N3 connection can use an NHS mail address to send SMS messages. This is free to use but is only for care based messages, not marketing messages of a commercial nature. The connection details are stored on the Email tab. (Default setting: OFF) [Global]

Auto-start Comms Manager on this workstation

Communications Manager is a background application which looks after sending SMS messages and emails. It must run on only one terminal on the network which has a connection to the internet. (Default setting: OFF) [Local]

Medication collection text messages

This determines when the SMS is sent during the dispensing session. (Default Setting: Do not send text messages) [Global]

MUR appointment reminder text messages

and the second section determines the interval (minus two weeks) for an MUR reminder text. Selecting the 12 month option will schedule an SMS two weeks before the one year anniversary of the patient's last MUR. (Default Setting: Do not send text messages) [Global]

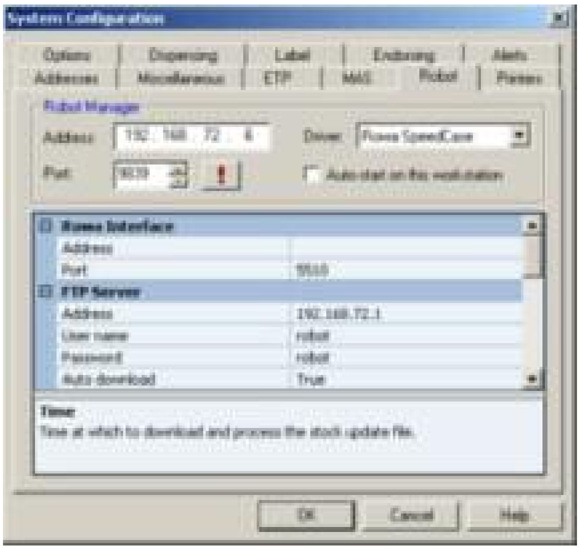
Message Relay Centre Account

If there is no NHS Mail account which can be used of the messages you intend to send are of a commercial nature Analyst can be setup to use a relay centre to send the messages.

The details at the bottom of the dialogue allow entry of the login details for the CSoft website which is responsible for sending the messages. When correct the account balance is displayed at the bottom left. Click on the blue hyperlink to visit the website to either sign up for a new account or to top-up the existing one.

Robot Tab

This tab of the PMR system configuration only appears if Analyst is used to interface with a robotic dispensing system like the Rowa SpeedCase.



The top portion of the screen enter the IP **address** of the terminal Robot Manager is running on (a loopback address must not be used). The **Port** number should remain at '9839' unless the robot engineers have had to make a change. The **Driver** will be 'Rowa SpeedCase'. If this is the terminal which will run Robot Manager use the **Auto-start on this workstation** option to launch Robot Manager whenever this terminal starts up.

The main pane contains all of the configuration settings for the Rowa Interface. When an option is highlighted the bottom pane provides an overview of what each option does. They are listed and explained below:

Rowa Interface

Enter the IP address of the Rowa Interface. The port number should remain as 5510 but can be changed in line with any changes made in the Rowa software.

FTP Server

The Rowa Interface will post a daily stock file onto an FTP server. Enter the IP address of the server here. By default the user name and password are both 'robot'. Set the 'auto download' option to be true to download the stock file automatically every day and set the time for this to be done. This should be at least 30 minutes after the Rowa Interface is set to upload it.

Options

'Split pack dispensing' will enable the robot to dispense packs which have been split and returned to stock. Whether on (True) of off (False) this option must match the corresponding option in the Rowa software.

The 'split pack consolidation' option becomes available if the previous option is turned on. With this option enabled the robot will dispense split packs first where possible.

Turn on the 'Enable MAX support' option if you have a Max (channel system) attached to the SpeedCase.

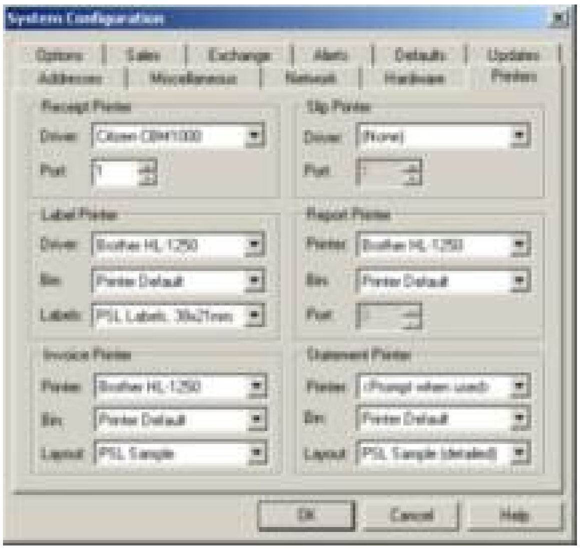
'Query new drug stock' is a facility which allows the robot to tell Analyst the stock level of new items added to the system. This should initially be turned off (false) until a full stock list from the robot has been processed and then turned on (true).

Delivery Points

These setting determine which delivery chute to use for each terminal. Each terminal has an entry in the 'normal dispensing' and 'homes dispensing' section to allow a different chute to be used when dispensing to patient's in home. If a new terminal is added to the system the '(default)' option will apply to it until it is changed. Set the delivery points to suit your needs.

Printers Tab

The final tab on the system configuration is the printers tab and is common across the whole Analyst suite of products. This configures the system for all your printers with the exception of the PMR label printer which has a separate tab in the PMR System Configuration.



The **Receipt Printer** is the small printer specifically used for the production of receipts at the PoS. These are driven directly from Analyst so you must have one of the printers in the list. Select the Printer model and the port number it is attached to (or proxy name).

The **Label Printer** is used for producing shelf edge or product labels. Some self adhesive label rolls are available for some receipt printers which can operate in label mode. If you have one of these printers and the label rolls, select your printer model and port number. More commonly an A4 printer is used to produce self adhesive labels and shelf edge labels on perforated card. Select the printer name, which must have been added through windows and the label style. More about printing labels can be found here.

The Label sheets which are a standard Avery size and perforated card sheets are available from our Consumables Department on 01257 275800.

The **Invoice Printer** should be an A4 printer.

The **Slip Printer** is used for printing customer's cheques and/or endorsing prescriptions in the PMR.

The **Report Printer** should be an A4 printer as it is used for the printing of all reports, MAR forms, picking lists and transfer advice notes.

The **Statement Printer** should again be an A4 printer.

If the option **<Prompt when used>** is selected for any of the options, the Windows printing dialogue will appear for the printer to be selected when a print job is created.

Main Office

Main Office Options

These options relate to the behaviour of Main Office.

The options include the option to reserve the stock for order that have not been picked. If this is selected then items which appear on an inbound order affect the product record by reserving it. If subsequent orders arrive for the same item and there is insufficient stock that is not reserved then an out-of-stock reply will be sent.

EDI Delivery notes can also be generated when TAs are printed by selecting the top option in the second section.

The Modem Orders section controls a number of features which are not relevant to orders which are manually input. The replies your system will generate and send to the remote systems are turned on here. The option to adjust requested order values will change the amount ordered to the maximum you can supply (your stock level of them) and create a follow on order for the rest (if the option for follow-ons is ticked). Product substitutions within the same drug family can be turned on here along with the automatic print of picking lists when the orders arrive. This is especially useful if you have printer in the warehouse for the pickers to act as soon as the orders arrive.

Paperwork Tab

This tab of the Main Office system configuration contains the options to produce the Picking Lists (PLs) and Transfer Advice Notes (TAs)to suit your needs.

In the top area of the window there are options for how to sort the items listed on the PLs and TAs in addition to printing them with shaded lines make reading them easier, to use the short descriptions and to print a VAT analysis on the TAs.

In the bottom half there are two panes which allow the selection and arrangement of the columns on the PLs and TAs to be organised. Click on the box next to the column name to select or de-select it. Only selected columns will display in the printed version. To rearrange the order of the columns, highlight the column you wish to move by clicking on it then click the arrow buttons beneath the pane to shuffle the column up or down through the list. The columns are printed left to right in the order they re listed in from top to bottom.

Printers Tab

The final tab on the system configuration is the printers tab and is common across the whole Analyst suite of products. This configures the system for all your printers with the exception of the PMR label printer which has a separate tab in the PMR System Configuration.

The **Receipt Printer** is the small printer specifically used for the production of receipts at the PoS. These are driven directly from Analyst so you must have one of the printers in the list. Select the Printer model and the port number it is attached to (or proxy name).

The **Label Printer** is used for producing shelf edge or product labels. Some self adhesive label rolls are available for some receipt printers which can operate in label mode. If you have one of these printers and the label rolls, select your printer model and port number. More commonly an A4 printer is used to produce self adhesive labels and shelf edge labels on perforated card. Select the printer name, which must have been added through windows and the label style. More about printing labels can be found here.

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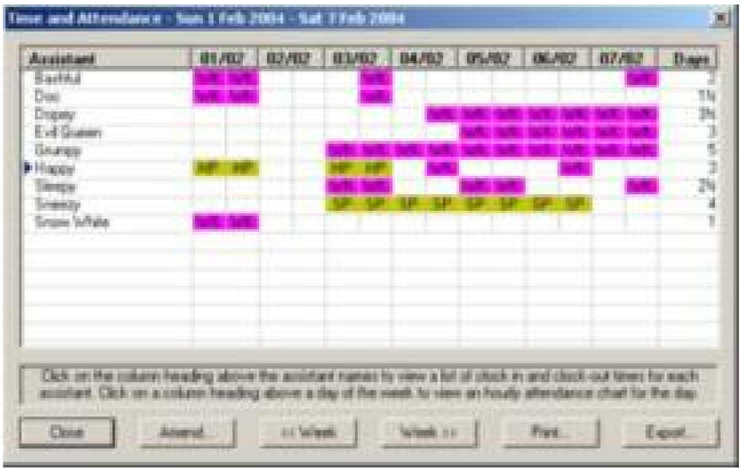
The **Statement Printer** should again be an A4 printer.

If the option **<Prompt when used>** is selected for any of the options, the Windows printing dialogue will appear for the printer to be selected when a print job is created.

Time and Attendance

The Time and Attendance function can be used to track which staff have worked when and record holidays and sickness. This is a very basic feature though and my not be suitable if you require in-depth analysis or reports. Access this section by selecting **Setup** then **Time and Attendance**.



The assistants in the system are displayed in the left column. The middle columns represent the days of this week each split into morning and afternoon. A column on the right displays the number of days the assistant has been present for. When an assistant logs on to the system they are marked as present.

Clocking On & Off

Analyst will fill in parts of the day in which assistants have worked. The times they work are determined from the times they 'Clock On' and 'Clock Off' which is different from logging in and out.

Clocking On

The act of clocking on is inferred when an assistant logs on for the first time each day. This marks them present for work. In practice staff should use the system by logging on to Analyst when they arrive at the start of their shift and, unless they intend to use the terminal straight away, log off straight away. This can be performed on any Analyst terminal.

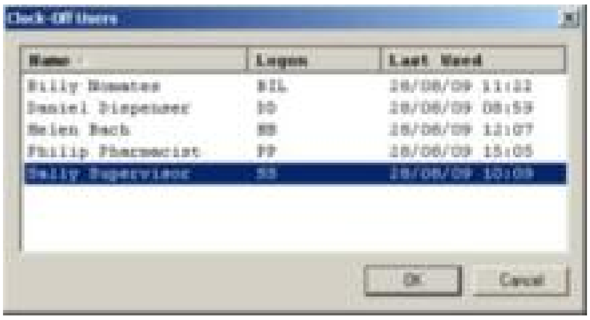
Clocking Off

The act of clocking off is *never* inferred. Although an assistant might log out from a system it does not mean it is the end of their shift.

There are two ways to clock off.

From the **No Sale** or **Misc** button on the Previous Sales or Script Queue screens respectively, select the 'Clock-Off users' option.

This now lists all users who are clocked onto the system i.e. those users who have logged into Analyst during the day (and have not clocked themselves off). The assistant who is currently logged into the system is automatically highlighted.



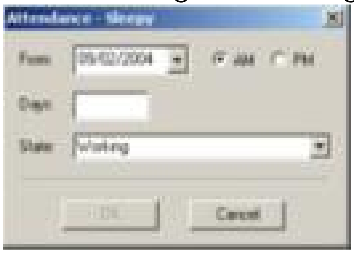
Select the user to clock off, or use the CTRL button to multi-select two or more users to clock off, and click the **OK** button.

Alternatively for counter staff: logon and start a sale. Then logon on again immediately. After logging on for the second time Analyst will ask whether or not to 'Formally clock out of the system'. The double logon can also be performed using the logon button or a ScanBadge.

Click **Yes** to clock out *and* log off.

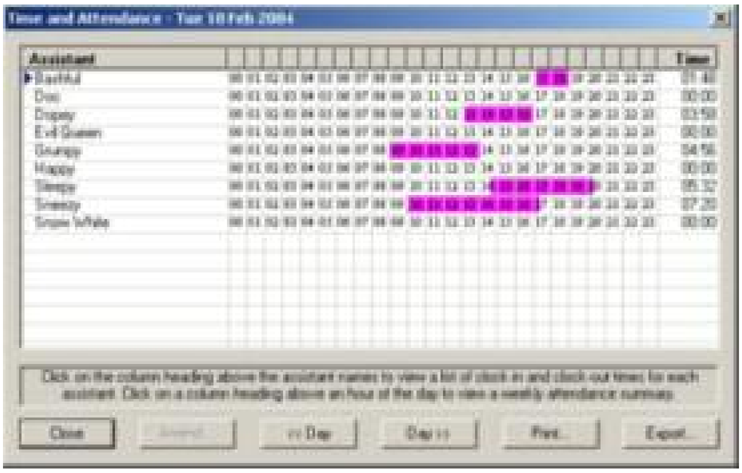
Adding an Event

Holidays and sickness can be added for assistants. Double click the assistant name in the left column or single click to highlight and click the **Amend** button.



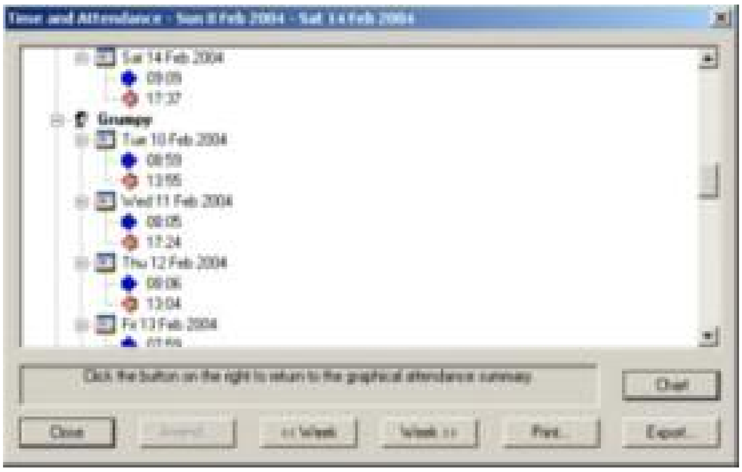
Enter the start date, the number of days the event will last for and select the status from the combo box. Add extra statuses by selecting the **<Edit list>** option and using the status editor.

More information is available for each day by clicking on the column header for the day in question.



The day is broken down into hourly columns with a summary of the hours worked in the column on the right. To return to the weekly view click a column header above an hour.

Another view is available by clicking on the assistant column header.



The icons are:

	Clock in
	Log on
	Log off
	Clock off

To return to the initial screen click the **Chart** button on the right.

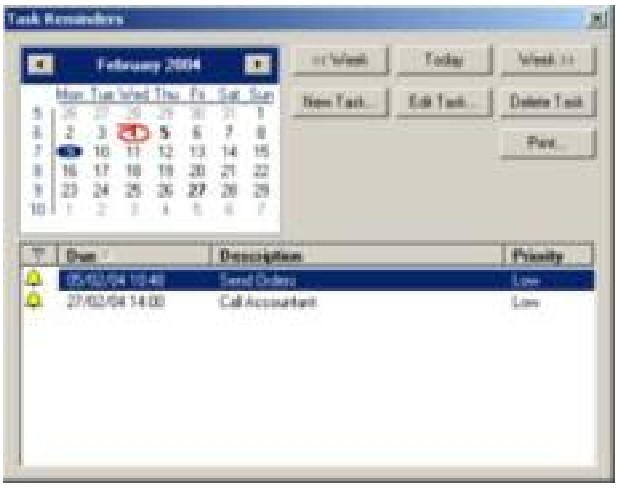
Status Editor

By selecting the **<Edit list>** option in the status combo box the status editor appears.

Type in the description of the status/event, provide a two letter abbreviation and Indicate whether payment will be received for time set to this status. In the Legend section specify the colours to be used on the charts.

Task Reminders

The Task Reminder section is found by selecting **Setup** and the **Task Reminders** options and allows notes, events and alarms on the system.



A calendar is displayed in the top left with a red ring circling today, a blue highlight on the day to set new tasks and days with tasks scheduled against them in bold. Highlight a day and click **New Task** to create a new event.

Type in the **Description** of the event, set the **Task Priority** and choose an **Action** from the combo box. The priority allows the tasks to be sorted in order of priority in the task list, whilst the action setting can be made to invoke a Head Office or PSL Data Exchange in addition to the standard pop-up message. Set any appropriate **Deadline** and **Enable alarm** if you wish a pop-up reminder to appear. If this is a regular event, the alarm can be set to **Repeat** at common intervals by selecting from the combo box. Any notes can be added in the free-type pane on the right.

When an alarm for an event appears it will stay on top of all other windows until you deal with it.

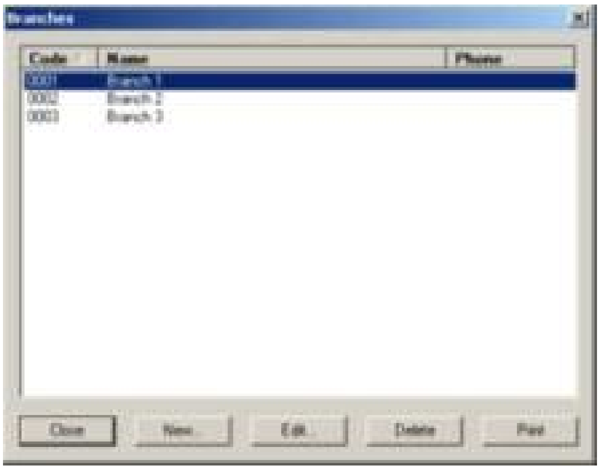
The alarm can be marked as **Done**, deferred until **Tomorrow**, turn the **Alarm Off**, **Defer All** messages or defer it until **Later** by specifying the number of minutes.

Using the Task Reminder to Invoke a Data Exchange

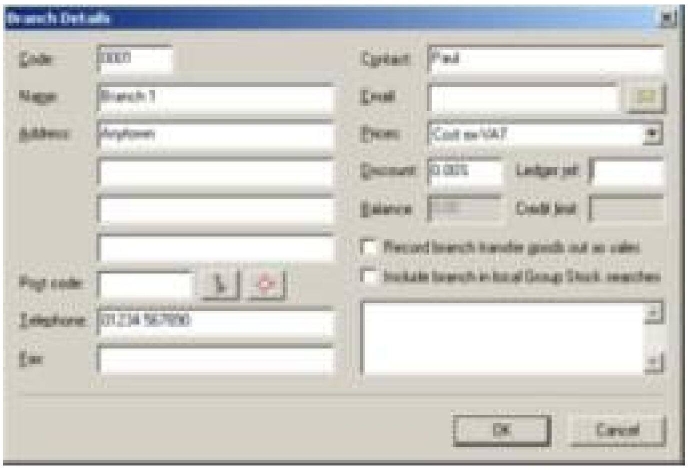
This option is most useful for Health Food users whose database update is released on the 1st of the month rather than on a specific day of the week. Set a new reminder called Health Food Database and select the action of PSL Data Exchange. Configure the time and date of the deadline on the 1st of the month at a time the system will not be too busy. Enable the alarm and set the repeat frequency to be monthly.

Branches

The Branches section allows the details of other shops to be setup on your system. Using the Inter Branch Transfer feature stock can be transferred or even sold to other branches. The rate the other branch is charged for the goods is determined in this section. To add branches to your system select **Setup** then **Branches**.



The branches in your system are displayed in the window. To add a new branch click **New**.



Enter the four digit account **Code** for the branch (their head office account code which is found in their Data Exchange setup) and type in their **Name** and **Address** details. The rest of the contact details are optional. Set the **Price** this branch is to be charged from the combo box from the choice of Retail, Cost+VAT, Cost ex. VAT and Free. A **Discount** can be applied to the price rate, or if the rate is prefixed with a "-" (minus) this becomes a surcharge.

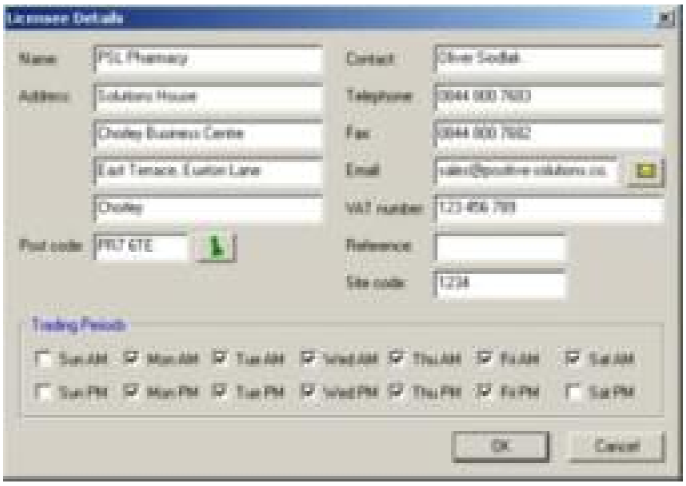
The transfer to this branch can be treated as sales if required. This is useful if the sole supply of a subsidiary is controlled by this shop and will allow the transfers (and from that you could infer sales) of the branch to be accounted for in the reordering of items from this shop.

The option to include the branch in local Group Stock searches will display the stock of the branch when the Group Stock tab of a product is selected. This should be ticked if you use the Analyst Head Office system.

Licensee Details

These are the details of the outlet the system is installed in and are primarily used to head receipts, invoices and account statements.

To enter or check the details they can be accessed by selecting **Setup** from the menu bar then **Licensee Details**.



The map button next to the postcode will launch an internet browser with the location of the shop at its centre of a Google Map.

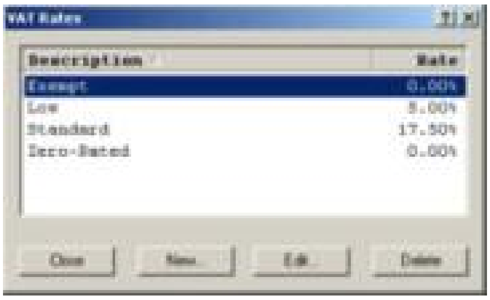
The **Reference** field is used to brand any printouts and is particularly useful if you are part of a group. Enter your shop reference number here.

Scottish pharmacies should enter their **Site code** in the final field on this page. This is used to identify the pharmacy in Minor Ailments Service transactions.

Enter your opening times in the bottom section.

VAT Rates

The VAT Rates are common through the system and are setup on install and as part of the OTC database update. These are used to calculate the VAT payable during each sale and on reports along with profit calculations and on 'margin' price maintained products. They are accessible from the **Setup** menu and the **VAT Rates** option.



The four standard options of Standard, Low, Zero and Exempt should not be deleted or amended, unless the Chancellor changes the rates, but additional rates can be added for any other strange rates you may encounter.

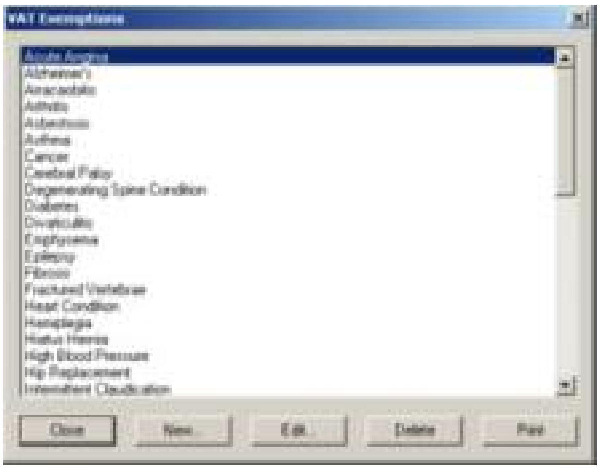
Click the **New** button and type in the description of the new rate and enter the percentage rate. The Ledger Ref field can be left blank.

VAT Exemptions

The VAT Exemption feature allows people with certain certified medical conditions to be exempt from paying VAT on certain products which relate to their condition.

Condition Setup

Initially the conditions must be setup. A number of typical conditions are already setup and can be found by selecting **Setup** and **VAT Exemptions**. The list of exemptions is then displayed.

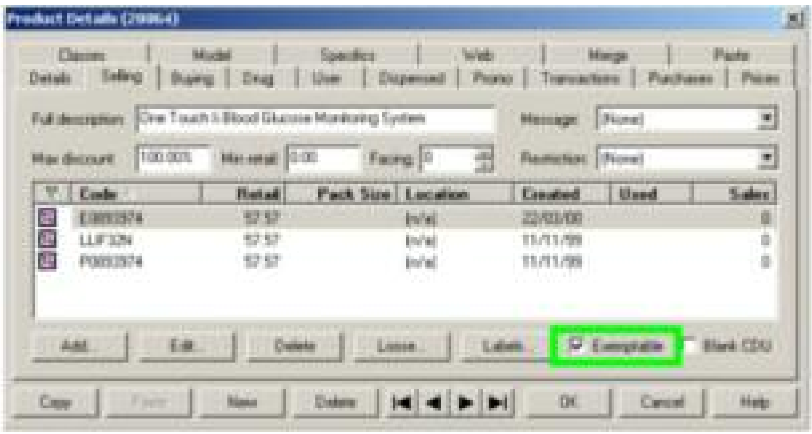


Setup new conditions by clicking the **New** button or change the details of an existing condition by clicking the **Edit** button.

To satisfy the VAT man the system can print a confirmation slip for the customer to sign. This provides sufficient evidence that they were not required to pay VAT. A standard slip can be created for your shop by calling the CareDesk and once configured it will appear in the confirmation slip box. The sample slip will always be there for you to experiment with. If you require a confirmation slip for customers with certain conditions you must select the slip for each of the conditions. If you do not require a confirmation slip leave the selection as "(None)".

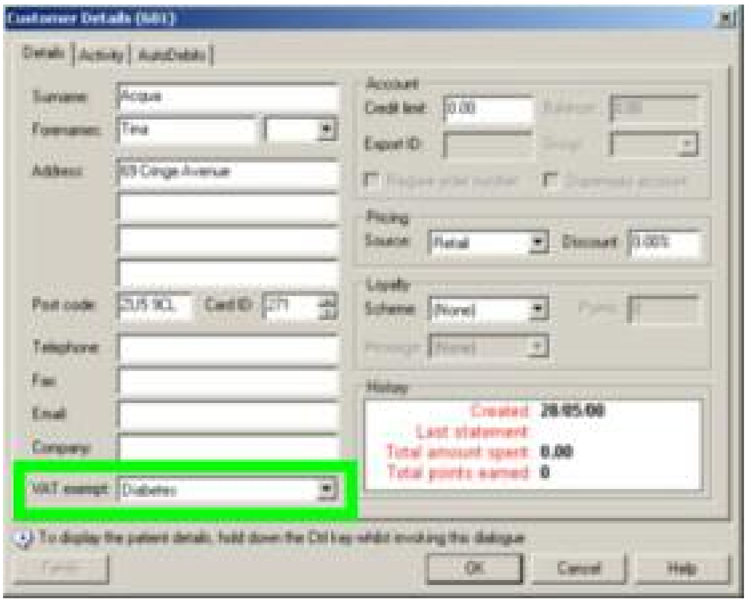
Product Setup

Sufferers of these conditions are not exempt from paying VAT on all purchases so each product which is likely to be bought by a VAT exempt customer must be identified. On the Selling Tab of the product check the **Exemptible** option at the bottom right.



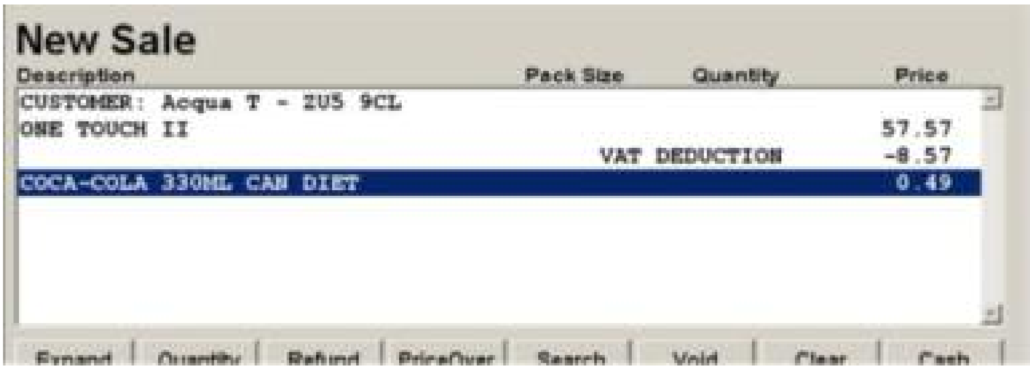
Customer Setup

Each customer who is eligible to be exempt from VAT on certain items must be identified as suffering from a condition setup above. In the customer setup, select the condition they suffer from in the **VAT Exempt** field.



Selling Exempt Items

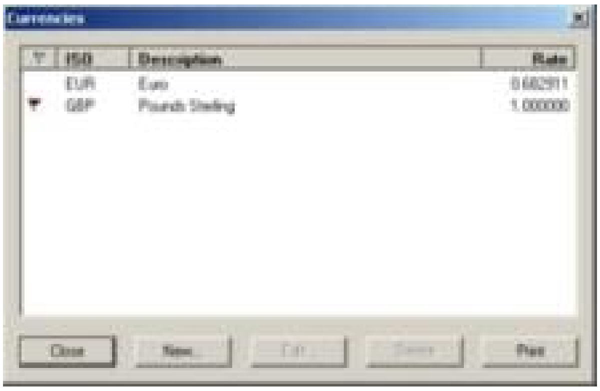
Analyst will automatically deduct the VAT of any items which are marked as exemptible sold to customers marked as exempt. So if all the steps above have been setup, identify the customer during the sale and scan or enter all of their items and Analyst will do the rest.



If the condition the customer suffers from is flagged to print a confirmation slip it will be printed on the receipt printer at the end of the sale.

Currencies

Analyst is a fully multi-currency system and will comfortably manage any currency changeover as proven with the Irish change over to the Euro in January 2002. Any number of currencies can be added with one designated as the base currency in which the system stores all figures. Select **Setup** then **Currencies** to view the currencies setup on your system.



The currencies are listed in the main window. By default the system is setup with only Pounds Sterling. The currency with the red flag next to it is the "Base Currency". This is the default currency new sales will be made in, and all prices in the system including orders and reports are displayed in this currency. The "Legacy Currency" is the former base currency. This is used for reference following a currency changeover.

To add a new currency click the **New** button.

Type in the **Description** and the standard international code for the currency. If the **ISO code** is not in the list, type it in.
If this is the base currency check the box to **Always give change in this currency**.

If this is the old base currency following a currency changeover mark this as the **Currency previously used in legacy transactions**. This marks the correct currency as legacy if more than two are setup.

The **Show legacy currency conversion rate on receipt** prints the total value of the sale in the legacy currency which helps customers and staff equate the new currency with the legacy one.

Select the **Currency symbol** from the list or add it if necessary. Type in the **Cheque wording** which is the common name for the currency.
NOTE: Your receipt printer may not be capable of printing all characters.

Enter the Conversion rate in the section at the bottom of the window. Only one of the fields need be filled as they are calculated from each other. Use the **From Default** to indicate how much of this currency one base unit of currency will buy, or the **To Default** to indicate how much base currency one of this currency will buy. If the exchange rate between this currency and the base currency changes it is your responsibility to keep this conversion rate up-to-date.

Accepting Different Currencies

Now you system is configured to accept more than one currency a new button will appear on the End Sale screen. This toggles between all available currencies in the system and is converted on-screen as each currency is selected.

Part payment can be accepted in any or all currencies for any sale.

If you are subject to a base currency conversion an additional utility has been written so you can easily change the system from one currency to another.

Time Zone Pricing

This feature allows the prices of goods to change for certain periods of time. These can be used to create "Happy Hours" where your prices fall or "Sad Hours" where they rise.

Select **Setup** and then **Time Zone Pricing** to view the time zone section.

Each day is broken down into hours. Select the day on the left of the window and check the boxes on the pane on the right to specify the range of time to use the time zone prices. The **All Times** and **No Times** buttons can be used to check or clear all of the time zones quickly. With the first day complete select the next day and repeat. If the second day is largely the same as the first the **Copy** button will invite you to replicate the time zones from the last day that was edited.

For the prices to change, each product must have a **Time Zone Price** which is set on the Promo Tab of the Product Editor.

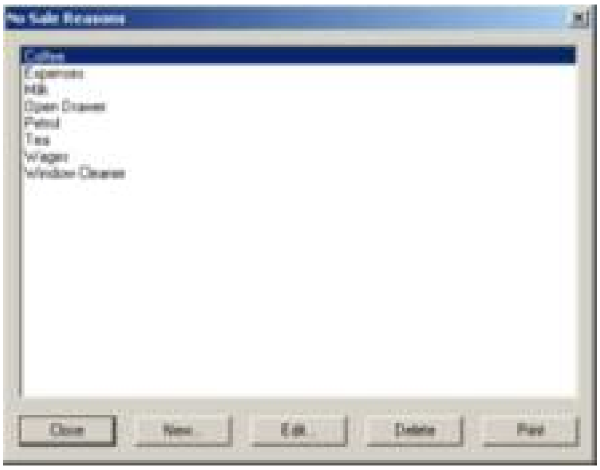
The **ESEL Label Address** relates to an Electronic Shelf Edge Label feature which is now obsolete.

At the specified time(s), the system will charge the price in this field and at the end of the time zone will revert back to the retail price held on the details tab.

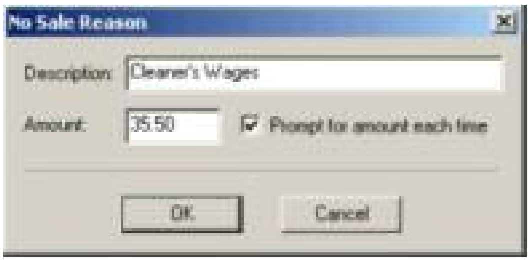
NOTE: When using this feature be sure to update the prices displayed to the customer with the prices.

No Sale Reasons

Rather than simply issuing cash from the drawer as a 'No Sale', Analyst provides the facility for cash removed from the drawer to be recorded against a reason. This list of reasons can be modified to fit your needs by selecting **Setup** and **No Sale Reasons** from the menu.



A number of typical options are setup on the system at the time of install. These include tea, coffee, milk, window cleaner etc and are all examples of how cash is used from the drawer to pay these everyday expenses. To add new options click the **New** button.



Type in the **Description** which is to be used on screen, receipts and Till Totals. The **Amount** can be entered either as guidance or if it is a constant amount. The **Prompt for amount each time** box enabled the reason to be defined as constant or changeable.

Creating No Sale Reasons 'On The Fly'

When using the No Sale option from the Previous Sales screen an option is displayed to create a **New** reason. This only allows the entry of a description and not am amount. Complete the setup of this reason as soon as possible by editing it though the **Setup** and **No Sale Reasons** options, then select **Edit**.

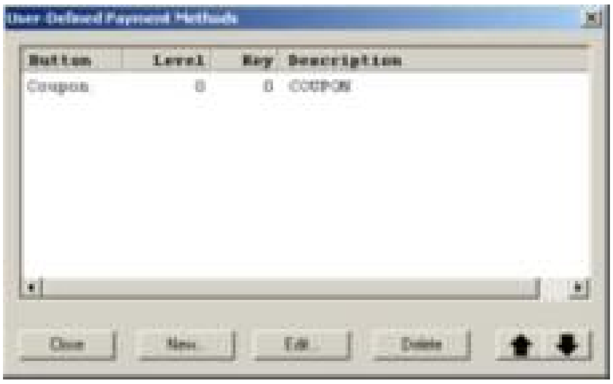
Using No Sale Reasons

From the Previous Sales screen, press the **No Sale** button. The list of No Sale Reasons is displayed along with the Account options, Bankings, Open Drawer, Till Totals and Drug Interaction Checking (if using Analyst IPS). Select the reason required and press **OK**. Depending on whether it has been set to prompt for an amount each time or not, you may be required to type in the amount to remove from the drawer and press OK before the drawer opens.

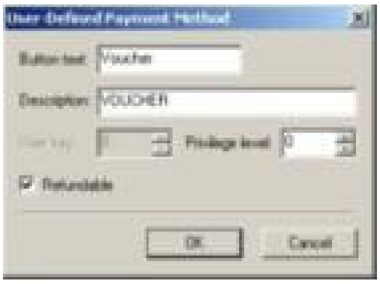
Payment Methods

Cash, Cheque and Card are standard payment methods and cannot be removed from Analyst. Additional ones can, however, be added. Coupons and vouchers are commonly presented over the counter, but they must be setup in the system to be accepted correctly.

These are added by selecting **Setup** and **Payment Methods** from the menu.



All additional payment methods are displayed in this window. To add to the list click the **New** button.



Type in the **Button Text** (max 10 characters) and the **Description** of the method (max 20 characters). The button text, as expected, will appear on the button relating to this payment method whilst the description will on the customer's receipt and on the till totals.

The **User Key** fields is only available if you are a user of a programmable keyboard. One of the definable user keys can be specified as this payment method. The **Privilege level** provides security for this method and only allows assistants with a privilege level equal or greater than this number to use it.

This payment method is optionally **Refundable**. This is not appropriate for all methods such as manufacturer's vouchers, but some forms of payment can be re-issued to the customer. Credit notes, for example.

Using Additional Payment Methods

When additional payment methods have been defined after the **End Sale** button has been pressed to finalise the sale the **Other** button will be available to select as well as the **Cash**, **Cheque** and **Card** buttons. Press the **Other** button to reveal the additional payment methods you have defined.

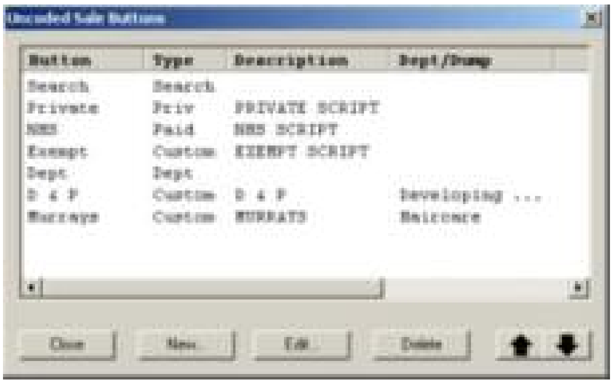
Uncoded Buttons

Uncoded buttons allow goods to be sold through the system without scanning them. There is a search facility which allows the item to be identified by description, a PLU (Product Look Up) function to type in the barcode or PLU number in case the barcode has been damaged and others which will be explained later in this topic.

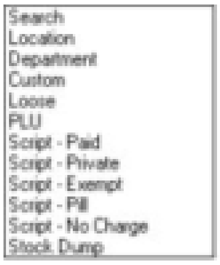
Although with an EPoS system everything should be tracked in and out of the shop through the system, sometimes it just isn't practical. Items such as prescriptions, Development and Printing charges and low value-high volume lines are such examples.

NOTE: No stock level, cost or profit information is available for items when using uncoded buttons. If you need this level of detail you will need to use Stock Dumps or create the product on the system in the Product Editor.

Select **Setup** and **Uncoded Buttons** to view the buttons already setup.



Click on the **New** button to add a new uncoded button. You may need to remove unused buttons as a maximum of 11 buttons can be defined.



Select the type of uncoded button this is to be from the combo box in the top left.

Search	Search for the product by description
Location	Log the sale against a specific location in the store
Department	Log the sale against a specific department in the system
Custom	Define your own uncoded button
Loose	This displays a list of all loose items in the system
PLU	Allows entry of a PLU or barcode number
Script - Paid	For use with Analyst IPS - an NHS prescription charge
Script - Private	For use with Analyst IPS - a private prescription
Script - Exempt	For use with Analyst IPS - an NHS prescription exempt from charges
Script - Pill	For use with Analyst IPS - an NHS prescription for the contraceptive pill
Script - No Charge	For use with Analyst IPS - an NHS prescription which does not attract a charge
Stock Dump	Log the sale against a stock dump

The **Button text** will appear on the relevant button in the uncoded section of sales whilst the **Description** defined further down appears in the sale detail, on the customer's receipt, on Till Totals and in reports.

The **User Key** is for users of a programmable keyboard and allows a 'hot key' to be defined for this uncoded item. The **Privilege level** allows the use of this button to be restricted to particular assistants as defined in the assistant setup.

If the **Price** of the item is always the same it can be defined here to save time entering it during the sale. If the price should be entered every time the button is used the price field should be left blank with no number in at all. A discount limit can be specified in the **Max Discount** field and if the VAT rate of the item(s) is known and constant it should be entered here, again to save time during the sale.

Items sold through this button can be made excluded from loyalty schemes by checking the boxes of the schemes in the **Loyalty scheme exclusions** pane. The **Code Prefix** field is for use with the PLU option and allows the system to automatically prefix the PLU number entered with a letter or code. This allows PLUs to be defined with their own prefix e.g. 'PLU' or 'Z' which will allow them to be found in the system more easily when reporting.

The **Department** field allows the sales figures of this button to be tracked through the system. A department from the system should be selected. If one is not specified the sales made on this uncoded button will appear only on the Till Totals and not in the system reports. The field becomes a **Stock Dump** option when the Stock Dump option is selected from the Sale Type list in which case the appropriate stock dump should be selected to account for the sales made with this button.

Speed Sale Buttons

The eight Speed Sale buttons on a system are displayed in the centre of the New Sale screen. The functions of the buttons are definable by you and represent your most frequently used functions and uncoded buttons. By using these buttons effectively the sales process is sped up considerably. Not only are the eight buttons unique to your shop, but they can be different on each terminal in your shop.

To configure the Speed Sale Buttons select the **Setup** menu then the **Speed Sale Buttons** option.

The window displayed on the left above is split into two halves. The top section contains the **Global Settings** which define the eight buttons across the entire system. Select the functions of the buttons from the options in the combo box which are displayed on the right above. The options are listed alphabetically with the Action options, End Sale options (payment methods) and Uncoded options. Note that additional payment methods and Uncoded options which you have defined appear in the list.

If you require different options on different terminals around the system, each terminal can deviate from the global settings by selecting some **Local Settings**. When set to "(Default)" the terminal will adopt the global speed sale buttons, but any which are changed over-ride the global setting for that button.

Each of the buttons can be accessed quickly by using the F5 to F12 buttons across the top of a normal keyboard as well as on the touch screen. To make this easier the button on-screen can be embossed with the appropriate key to strike by selecting the **Display function key hints on Speed Sale buttons** option.

The **Clear All** button at the bottom of the window resets both the global and local settings back to "(None)" and "(Default)" respectively whilst the **Default All** button resets the local settings to the "(Default)" only.

Speed Dispensing Buttons

The eight Speed Dispensing buttons on a system are displayed in the centre of the Dispensing screen. The functions of the buttons are definable by you and represent your most frequently used functions. By using these buttons effectively the dispensing process is sped up considerably. Not only are the eight buttons unique to your shop, but they can be different on each terminal in the dispensary.

To configure the Speed Sale Buttons select the **Setup** menu then the **Speed Sale Buttons** option.

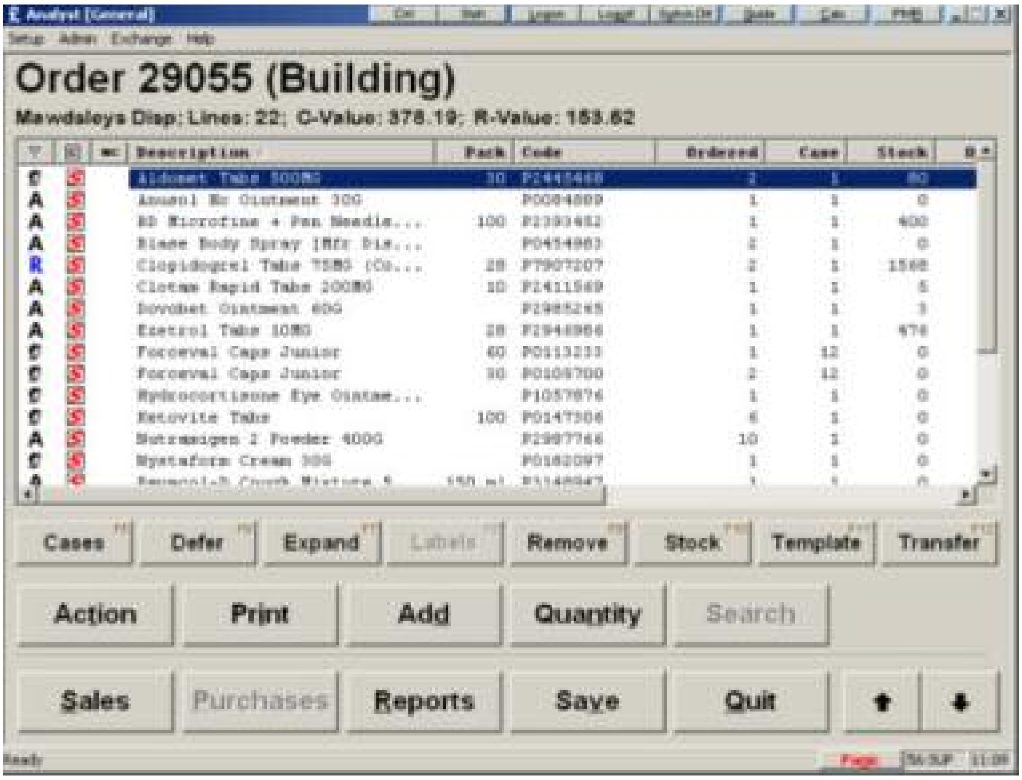
The window displayed on the left above is split into two halves. The top section contains the **Global Settings** which define the eight PMR buttons across the entire system. Select the functions of the buttons from the options in the combo box which are displayed on the right above. The options are listed alphabetically with commonly used functions, charges and script types.

If you require different options on different terminals around the system, each terminal can deviate from the global settings by selecting some **Local Settings**. When set to "(Default)" the terminal will adopt the global speed sale buttons, but any which are changed over-ride the global setting for that button.

Each of the buttons can be accessed quickly by using the F5 to F12 buttons across the top of a normal keyboard as well as on the touch screen. To make this easier the button on-screen can be embossed with the appropriate key to strike by selecting the **Display function key hints on Speed Sale buttons** option.

SpeedOrder Buttons

A row of eight buttons can be added to the ordering screens to speed up access to the functions found under the action button.



Configuring the SpeedOrder Buttons

There are three sets of buttons as there are three different order screens. Each of the screen can have a different set of buttons. The setup for all screens is contained from Setup and SpeedOrder buttons.

In each case Button 1 will appear on the left and Button 8 on the right accessible with buttons F5 to F12 respectively. The F-key short cuts can be embossed on the buttons by clicking the option at the bottom left.

Select the functions for each button. An explanation for them is detailed below.

Use the **Clear All** button to set all buttons to (None). If all the buttons for a screen are set to (None) then the SpeedOrder buttons are not displayed at all.

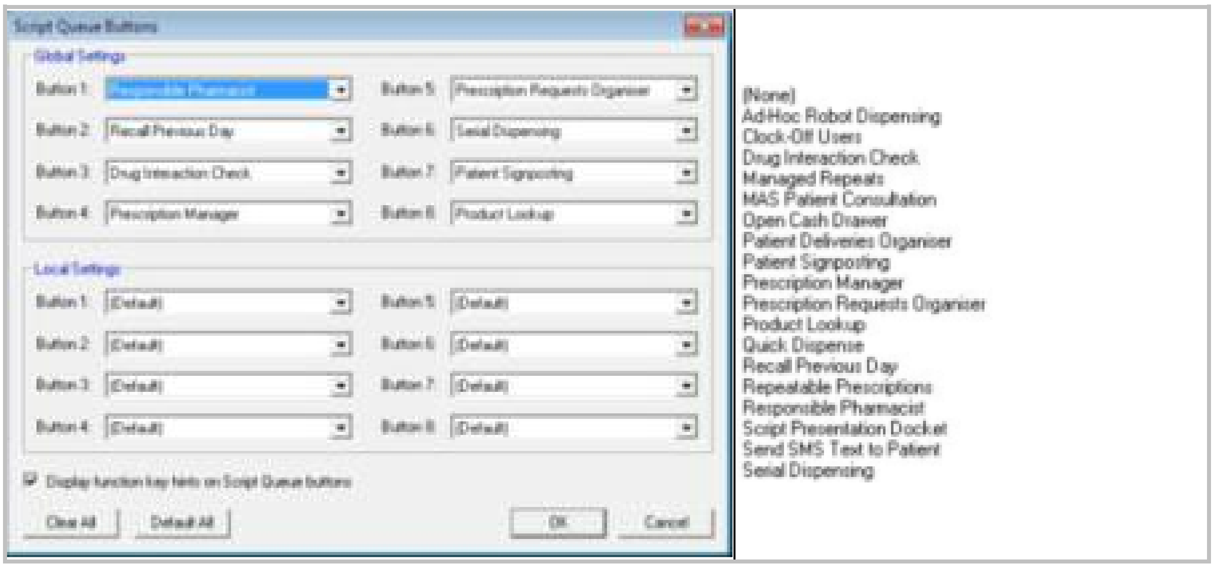
Here's a list of the buttons available on each screen and what they do.

Building	Receiving	Completed	Function
(None)	(None)	(None)	This button will be blank. If all buttons are (none) the SpeedOrder buttons disappear.
Expand	Expand	Expand	Opens product editor for this line.
Labels	Labels	Labels	Print product labels for the highlighted line(s).
Stock	Stock	Stock	Enter the stock level of this line.
Template	Template	Template	Apply a product template to the highlighted line(s)
	Single	Single	Edit the single cost price for this line.
	SSP/Retail	SSP/Retail	Edit the SSP/Retail price for this line (depends on which is displayed - see supplier setup)
Case			Edit case rounding rules.
	Case	Case	Enter a case cost price for this line.
Defer			Defers the order of this line.
Remove	Remove		Removed the highlighted line(s) from the order.
Transfer	Transfer		transfers the highlighted line(s) to another order.
	Elsewhere		Flags the highlighted line(s) to re-order elsewhere/anywhere.
	To Follow		Marks the highlighted line(s) to follow on a subsequent delivery

Script Queue Buttons

On Analyst PMR there can be eight buttons which provide direct access to commonly used parts of the system. They lie above the main buttons and look and work just like Speed Sale, Speed Dispense and Speed Order buttons. And they are configured in the same way.

Select **Setup** and **Script queue buttons** at the top left of Analyst PMR.



Select from the list which each of the buttons should be. The Global Settings at the top set the buttons for all terminals, but it certain terminals perform certain tasks they can opt out of the Global Settings to more appropriate Local Settings which affect only this terminal.

When set click the **OK** button.

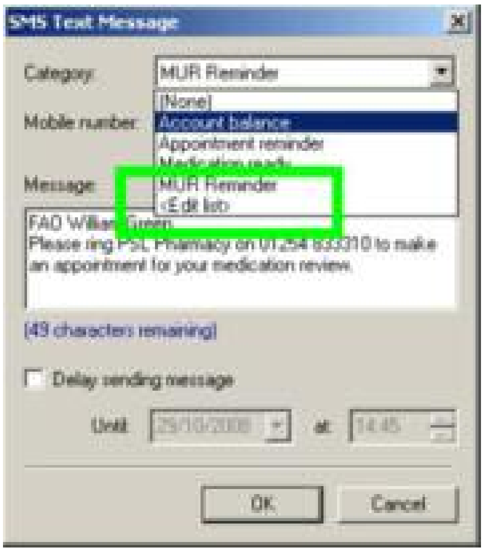
SMS Message Templates

Creating New Templates

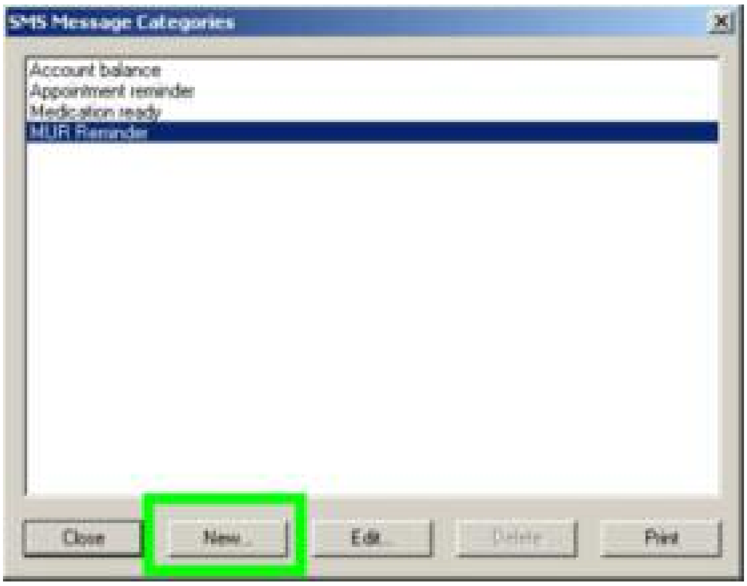
Each new message category can have an associated template to make the process of composing the message a lot faster and more consistent.

Any of the standard messages can be edited and renamed as appropriate but cannot be deleted.

To add a new category and template select **Setup** and **SMS Message Templates** or the **<Edit list>** option from the SMS message dialogue.



The list of categories now appear.

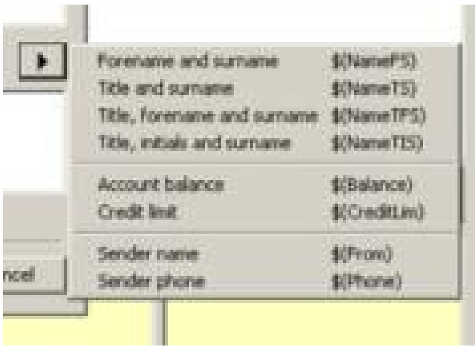


Click on the **New** button to create a new template. Alternatively highlight and **Edit** one of the existing templates.

Type in the description of the category and then the default message, or template, beneath. Click **OK** to save the template.

Using Placeholders

Messages can be personalised to be more friendly to the patient and to reassure them that the message is not spam and is intended for them. As part of your message either type in the place holders or select them from the list under the 'play' button just above the message box.

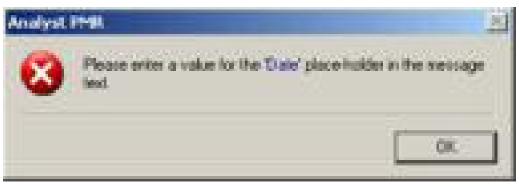


$(NameFS)	Forename and surname
$(NameTS)	Title and surname
$(NameTFS)	Title, forename and surname
$(NameTIS)	Title, initials and surname
$(Balance)	Account balance
$(CreditLim)	Credit limit
$(From)	Sender name
$(Phone)	Sender phone

When the message is previewed Analyst will replace the placeholder with the appropriate information from the patient's record.

Alternatively there are placeholders which must be changed when the message is bring written. Use the square brackets to indicate to Analyst that it is a placeholder and the message will not be sent until they are replaced.

In the example, "Dear $(NameTS), your appointment is on $[Date] at $[Time]" the round brackets or parentheses of $(NameTS) will substitute the title and surname of the patient, but the square bracket around the $[Date] and $[Time] will need to be edited before the message is sent. Analyst still knows they are placeholders though and will not permit the message to go until they are changed.



Repeating Templates

If there a popular scheduled that are used they can be created as a template with a regular schedule in the same way as other templates.

The only difference between making a template and creating a one-off message is that rather than specifying a final date a max number of days is specified. This is then applied to each new message created from this template.

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