POSITIVE SOLUTIONS

Android Hand-Held devices

User Guide

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Android devices

Our hand-held Android based scanning devices with specialised software developed by Positive Solutions.

Each device can have a live connection to the Analyst database via a wireless network or Bluetooth connection. This allows immediate confirmation that the barcode being scanned is recognised within Analyst.

	Handout Manager; an application that provides functionality for managing dispensed medication and the handout of bags to patients.
	Analyst Stock Entry is real time a stock counting application to update stock levels. Offline modes are available where wireless connections are not possible.

These terminals are available to buy or to loan from PSL. Please ring your Account Manager for more information.

Overview

What's in the box?

When you receive your Android device you should find the following in the box.

Items

Item No	Description	Item No	Description
A	Android Device	**B**	Android Device charge dock
C	Power adaptor	**D**	USB Cable
E	TP-LINK Wireless Access Point	**F**	TP-LINK 2 Omni Directional Antennas
G	TP-LINK power supply	**H**	Network cable
I	Bluetooth USB module	**J**	Bluetooth setup CD
K	Letter	**L**	Instructions

Charging Dock

Important: **The Android device will need to be charged for 4-6 hours before use.**

To charge, connect the micro end of the USB cable (part **D**) into the USB charging port on the base of the Android Device charging dock (part **B**) and connect the other end of the USB cable (part **D**) into the power adapter (part **C**). Place the Android Device (part A) into the Dock and turn on the power.

Where are you located?

Depending on your location i.e. England, Scotland or Wales, will determine how to connect the Android device to Analyst. There are two methods to consider, Wireless or Bluetooth. Each has its Pro's or Con's as highlighted in the table below.

	Bluetooth Dongle	TP-LINK WAP (Wireless Access Point)
Method of connection	Dongle inserted into an Analyst terminal	Wireless Access Point (WAP) added onto the existing Analyst network
Ease of establishing connection	Easy installation of dongle but drivers will need to be loaded and each Android device will need to be paired with the Analyst terminal	WAP can be very easy if you have access to the network hub and there is room. If it's locked away in a room, cabinet or stuck at the back of a shelf covered in carrier bags it becomes less easy. If there are no free ports in the hub it becomes very tricky. But once the hardware is installed the Android devices are pre-configured to look for the WAP so they should connect automatically.
Range	Up to 30m with line of sight. Walls and furniture significantly reduce this but if your selected Analyst terminal is near the area to be scanned this is OK. Large, oddly shaped shops and stock rooms might become a problem.	Up to 100m with line of sight. This is significantly reduced with walls and furniture. This depends where you've managed to plug the WAP into and can either work for or against you in terms of the area you scan. You have more opportunity to move the WAP with some creative patching and positioning.
Security	Secure. Any device that needs to access the system will need to be paired with the terminal the Bluetooth dongle is attached to so it'd be very hard for anyone to gain unauthorised access.	Very secure. The Android Device are preconfigured to connect to the WAP that has been provided. Other devices wanting to connect to this WAP would require a strong password which is not given out.
Speed	All technologies should offer similar performance.	All technologies should offer similar performance.

As a rule of thumb, it is recommend using following connections:

England or **Wales** follow the Connecting the TP-LINK Wireless Access Point, starting on **Page 7**.
Scotland follow the Connecting the Bluetooth Dongle, starting on **Page 94**.

Important: *By using the Bluetooth connection (Scotland), it is recommended that the stock count is performed offline, as depending on differing factors like the size of your shop, the Bluetooth wireless connection can drop.*

Technical Setup

Connecting the TP-LINK Wireless Access Point (WAP)

For the Android device unit to communicate with Analyst, the Wi-Fi Hub (marked TP-LINK) supplied with the Android device unit needs to be connected to the wired network – Not an individual terminal.

> ***NB:*** *For it work properly it must be connected to the Analyst network*

Checking for existing Wi-Fi networks

> ***Important***: Before connecting the most recently received TP-LINK Wireless Access Point (part E), checking for any existing PSL Wi-Fi networks must be made before setting up the new TP-LINK Wireless Access Point (part E) as multiple networks can cause issues.

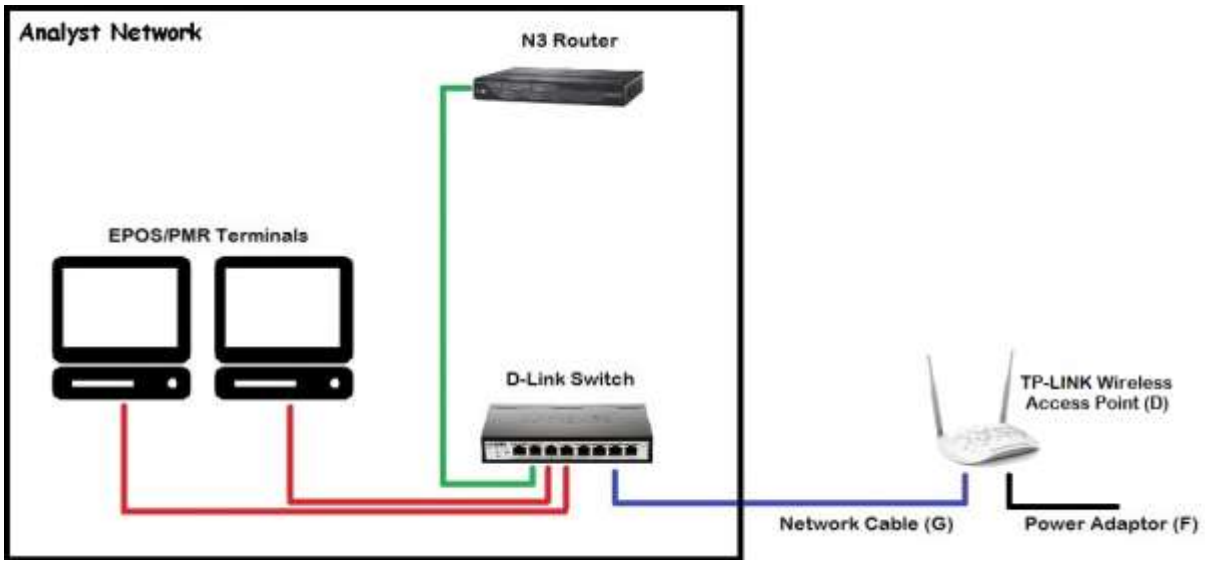
Please follow the step below:

1. Turn on the Android device (part **A**) and unlock.
2. Swipe up and select the Settings icon.
3. Check that Wi-Fi is enabled.
4. If there is a connection listed as "PSLlink", locate any existing Edimax/TP-LINK Wireless Access Point and disconnect.

Once the above "Checking for existing Wi-Fi network" steps have been completed, continue with the steps below for the new TP-LINK Wireless Access Point:

1. Attach the 2 antennas (part **F**) to the back of the TP-LINK Wireless Access Point (part **E**).
2. Attach either end of the network cable (part **H**) into the Ethernet port at the back of the TP-LINK Wireless Access Point (part **E**).
3. Locate the D-Link switch (not supplied) in your pharmacy. This box is usually situated close to either the N3 Router (Not supplied) or your Master Terminal and is used to link all of your terminals to the N3 Router. Once located, connect the other end of the network cable (part **H**) from the TP-LINK Wireless Access Point (part **E**) into any spare port into the D-Link switch.
4. Connected the power adaptor cable (part **G**) into the Power jack at the back of the TP-LINK Access Point (part **E**) and plug into the mains and switch on. Turn on the TP-LINK Access Point with the ON/OFF button located at the back of the unit.

Once these steps have been complete, the configuration between the existing your network and the TP-LINK Wireless Access Point should look as below:



***NB**: If you cannot locate the D-Link switch or you do not have on, it is OK to attach direct into the router*

Analyst Hand-Held Terminal Server

To establish the connection between the network and the Android device chose a terminal in which the Analyst Hand-Held Terminal servers to run on. This application allows the Android device and Analyst to exchange information.

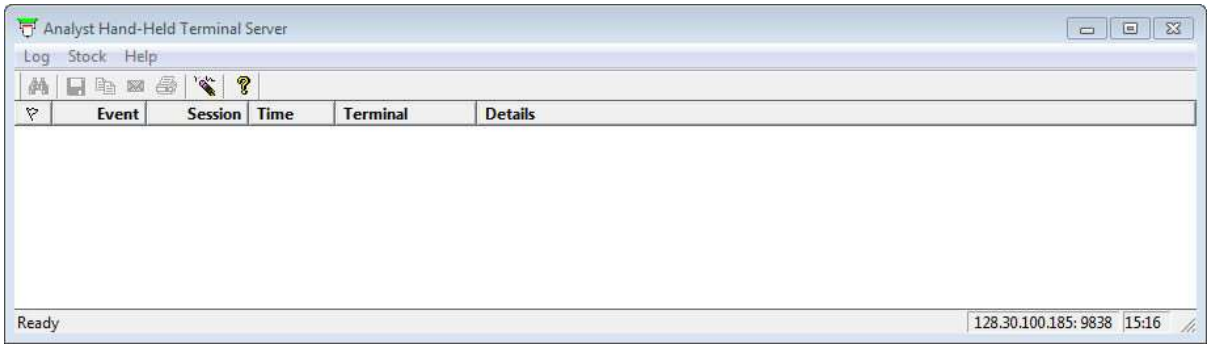
> ***NB:* Scotland Only,** *this terminal will need to be the one with the Bluetooth connection attached*

Android device Server must only run on one terminal but not necessarily the master. To open the Analyst Android device Server Application on your chosen terminal, minimise any open programs.

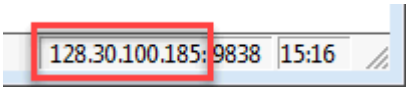
Windows 7, click on the Start button located in the bottom left corner of the Windows task bar. Click on All Programs, select the Analyst folder to expand and click on Android device Server.

Windows 10, Click on the Start button left of the Windows taskbar. Select the Analyst folder and click Android device Server.

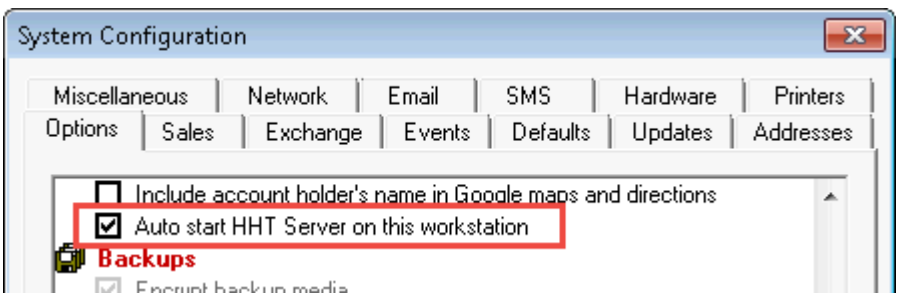
The application will launch when the Android device Server option is selected.



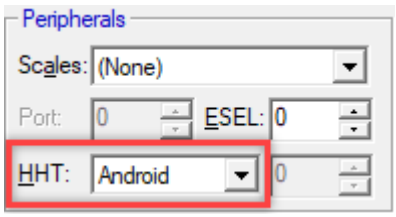
> **Important: Make a note of the IP address located in the bottom right corner as it will be needed later in this section.** This will be different to one as below and will differ from terminal to terminal.



To configure Analyst so that the Android device Server opens automatically each day, from the EPOS or MGMT side of Analyst, click on the **Admin** menu, select **System Configuration**, scroll down to the **Miscellaneous** options and place a tick in the '**Auto Start HHT Server on this workstation**'.



Select the Hardware Tab. Call our Service Desk on 01257 235940 to obtain the password. Under the Peripherals section, click on the drop-down menu next to HHT and select **Android.**



Click on the **OK** button.

Pairing the Applications to Analyst

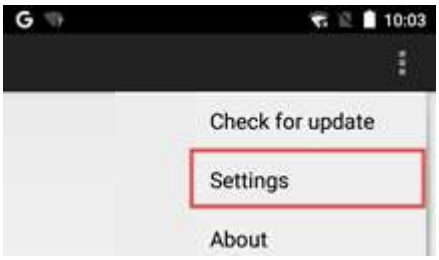
The applications need to be paired to Analyst on your chosen terminal which is running Hand-Held Terminal Server.

To unlock, simply hold and swipe the Lock icon to the right.

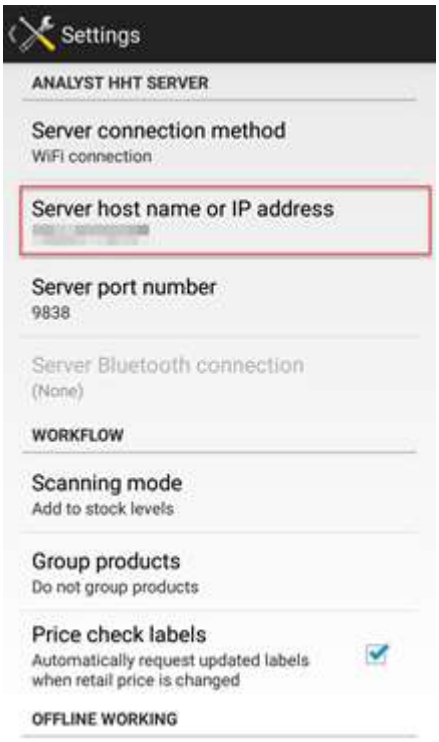
Select the application that needs to be paired. If more than one application is intended for use, then each application will need pairing separately.

Click the **Menu** icon at the top right.

Click on the **Setting** option.



Click on the **Server host name or IP address** option.



Enter the IP address from Hand-Held Terminal Server (HHT) as mentioned previously and click **OK**.

Click **Back** button to return to the Applications main screen.

Your Android device unit should start to work now that it has been Pointed (configured) to Analyst and the HHT server application has been started on your chosen terminal.

Test the Connection

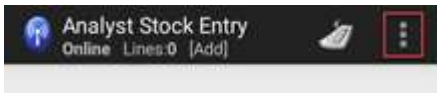
Handout Manager

Scan a bag label. If the Bag information screen appears, then the connection is OK.

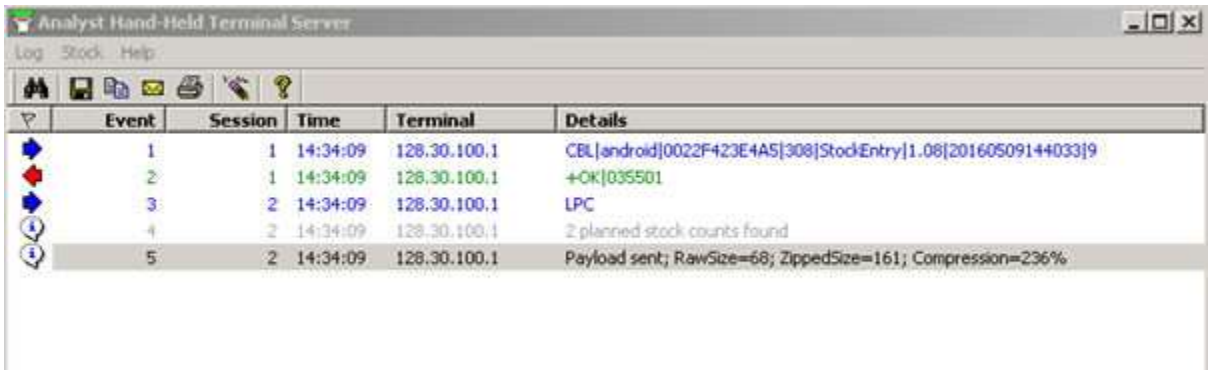
The Android device is now ready to assign bags to shelves or begin the handout process.

Analyst Stock

To check this is working OK (without making any inadvertent changes to products) select the **Menu** button at the top right and choose '**Download planned count**'.



On your selected terminal, within the Android device Server application it should now display any Rolling Stock count that have previously been generated or if there are none, a message will appear to say "There are no outstanding planned stock counts on Analyst" which is normal as it demonstrates that the connection has worked.



The Android device unit is now ready to begin Counting Stock.

Analyst POS

To check whether the connection is OK, scan a token that has already been dispensed. If a message appears with 'This prescription token has already been requested on . . .' then the connection is OK.

The Android device unit is now ready to begin scanning tokens.

Connection Issues

If a message appears saying 'Cannot connect to host app server" this means that the Analyst Hand-Held Terminal server is not running.

If a message appears saying 'Cannot connect to Analyst' or any other authentication messages, then the connection between the Android device and Analyst hasn't been made. Check the Settings within the application to make sure the Connection method is correct as detailed earlier in this section.

If there are any WAP connection problems or you are using a Bluetooth connection, refer to the WAP and BLUETOOTH Connection Setup on **Page 91**.

Handout Manager

Overview

Handout Manager is an Android based application that provides functionality for managing dispensed medication and the handout of bags to patients.

Locations

Locations form the basis of where bags are stored, and theses are defined through Analyst allowing the structure of available storage locations within your pharmacy. Each location is identified by its type, such as dispensary, MDS, tote, missing, shelf, fridge or CD cabinet.

	Dispensary; where newly dispensed items are automatically assigned
	MDS; where newly MDS dispensed items are automatically assigned
	Missing; where bags that have been originally place in storage will go to if a storage area is deleted or a bag is manually moved to it
	Shelf; a shelf location
	Fridge; a fridge location
	Secure; a secure location
	Delivery; a delivery location
	Robot; where bags are placed in robot storage
	Unshelved; where bags have returned to the pharmacy after being assembled at the Hub

Locations are used to track bags as they move through the pharmacy process.

Home Screen

Patient Search
Selecting the Patient Search button displays the Find Patient screen to identity the patient for which bags are to be handed out.

Previous Patient
Selecting the Previous Patient button will return to the Patient Handout screen for the patient that was most recently dealt with.

View Locations
Selecting the View Location button displays the current list of Storage Locations.

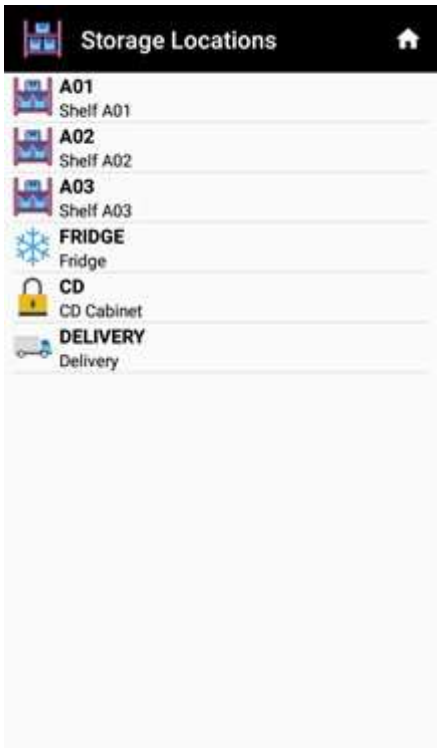
Scan Functionality
A barcode can also be scanned from the home screen by pressing one of the scan buttons either side of the device. This could be one of following:

- a bag, container or an ACF bag label to view the contents; or
- a location barcode to display the location information; or
- a medication label as part of a dispensing check.

Storage Locations

All available storage locations can be accessed by selecting the View Location button from the home screen.

Storage Locations is also accessed from the Bag Information screen by selecting the Assign Location button.

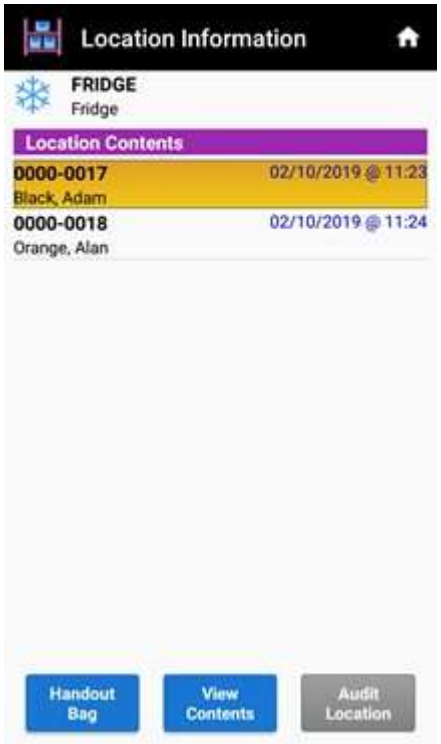


Location Information

When a location is selected, the Location Information screen displays the name of the location.

The Location Information screen is also accessed by scanning a location barcode.

Each bag within that location is listed with the dispensing reference, the patient name and the date and time when the prescription was dispensed.



Handout Bag
Selecting the Handout Bag button will start the Handout process.

View Contents
Selecting the View Contents button will display the Bag Information screen.

Audit Location
Selecting the View Contents button will display the Location Audit screen.

Location Audit

When the Audit Location button is selected, it displays all bags currently perceived to be in that location. Use the audit location to match the perceived contents of a location against the physical bags stored to ensure an accurate account of bags is being kept.

The default state of each bag is "unaudited".

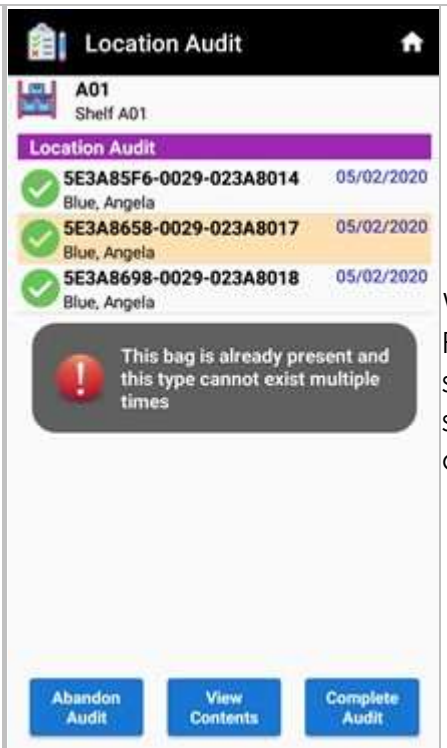
Start the audit by simply scanning each physical bag contained in the location to mark the bag as present.

New bags

If a new bag is scanned that wasn't perceived to be in the location, the details of the bag is retrieved and added to the list.

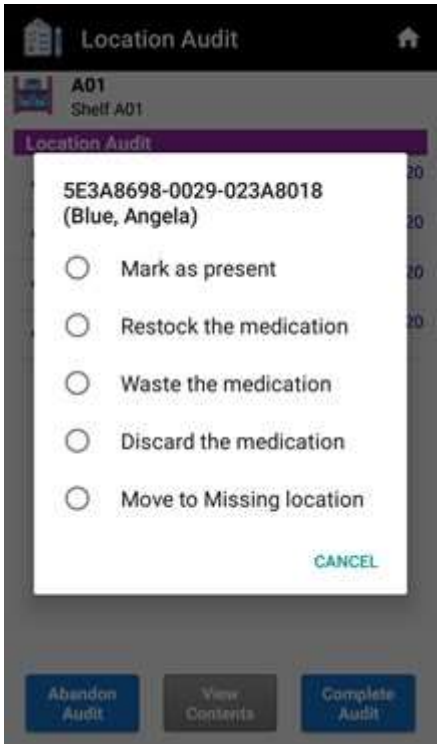
Additional bags

If a bag is scanned that has already been marked as present, the type of label scanned will determine the following:

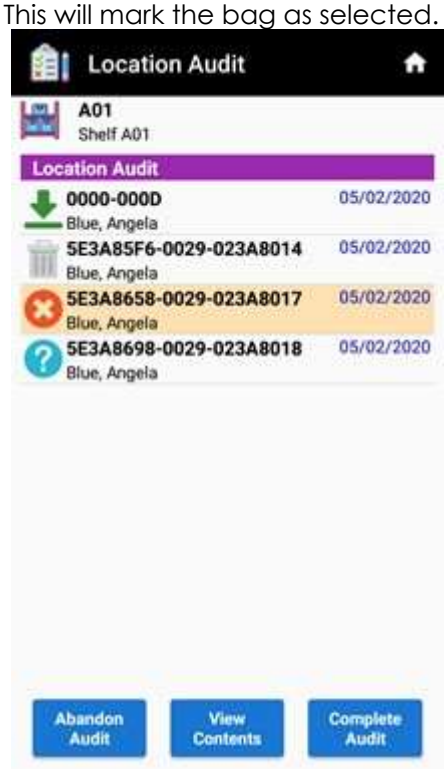
Container or Robopharm a bag label		When a container or a Robopharma label is scanned, a warning is shown that the bag has already been scanned
Bag label		When a bag label is scanned, it will be added as an additional bag

Unaudited bags

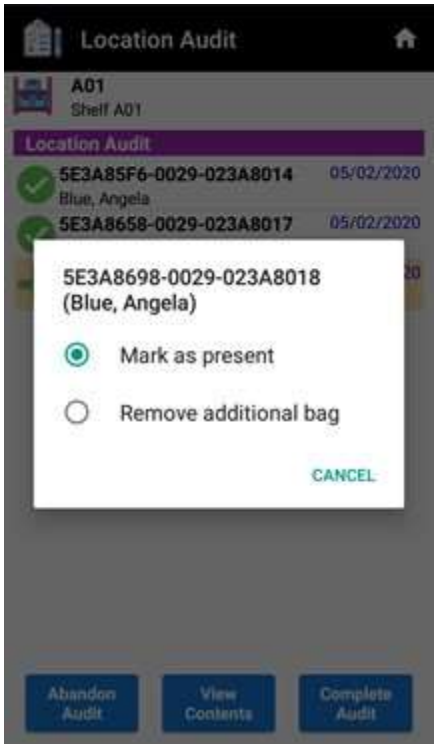
If there are any bags left in an unaudited state, the status can be changed individually by initiating a long press on the bag and selecting one of the following options:



This will mark the bag as selected.



Bags which have added as Addition bags, a long press will display the following options:



Abandon Audit
Selecting the Abandon Audit button will disregard any changes made. Selecting the Home and Back button will also abandon the audit.

View Contents
Selecting the View Contents button will display the Bag Information screen.

Complete Audit
Selecting the Complete Audit button will complete the audit and return to the Location Information screen. Upon completion, if there are bags still in an unaudited state, the options as per the Unaudited bags section will appear to change the status.

Bag Information

When a bag is selected to be viewed, the Bag Information screen is displayed.

The Bag Information screen is also accessed from the Patient Handout screen by selecting the Bag Information button or by scanning a bag label.

The Bag information screen displays the dispensing reference or when using containers, the unique identifier, the location of where the bag(s) are stored and the patient details.

The contents of the bag is displayed listing each item and the quantity dispensed.

If the bag has already been collected, the Bag Contents section will show the collected date and time.

Handout bag
Selecting the Handout Bag button will start the Handout process.

Assign Location
Selecting the Assign Location button allows a bag to be moved to a new Location.

Edit Patient
Selecting the Edit Patient button allows the patient details to be edited.

Assigning Bag Locations

Storing bagged medication can be achieved in a number of ways once the bag label has been scanned

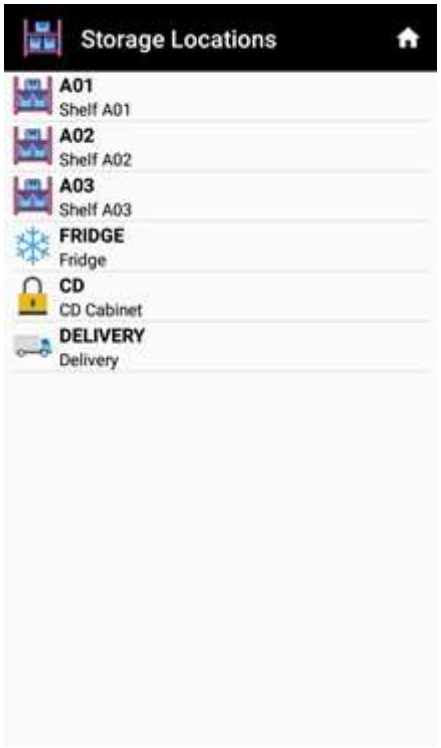
Scanning the Location label

Scanning a Location label after the bag label will automatically move the bag into the new location, displaying a brief message on the new location and returning Handout to the Home screen.

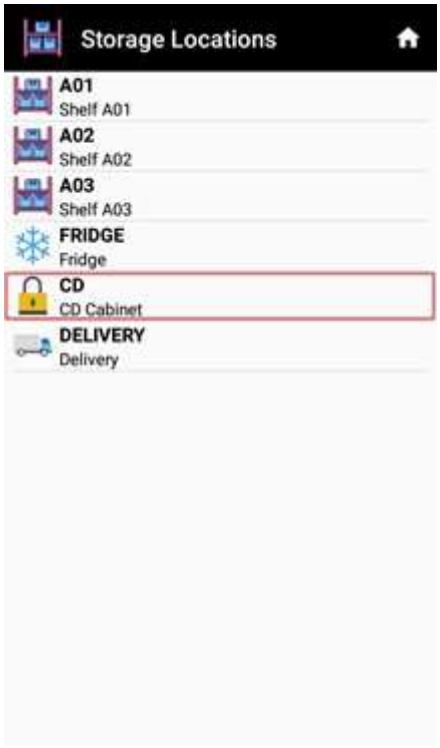
Assign Location

When the Assign Location button is pressed, this also allows a bag to be moved to a new Location.

A list of available locations are displayed.



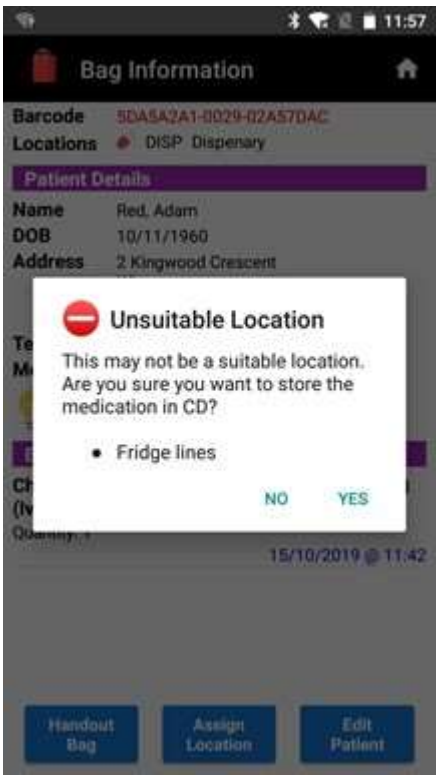
Press on the new location to move the bag into that location.



Checking Storage Location Suitability

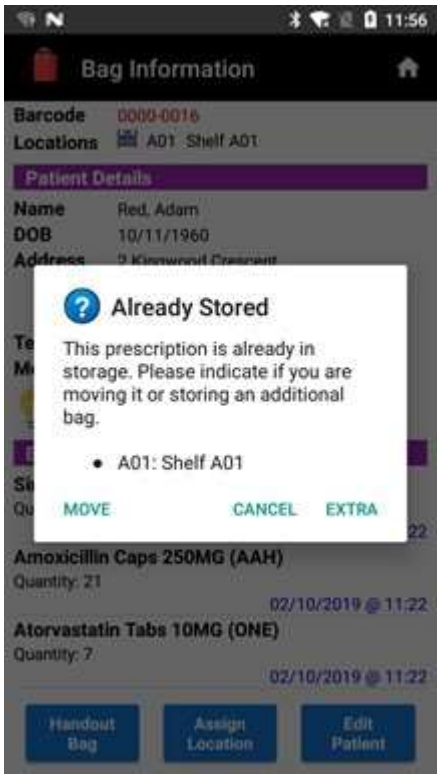
When bagged medication is scanned, you will be informed if the location is potentially unsuitable, either because the prescription contains fridge lines or controlled drugs, or because the patient expects a home delivery.

The delivery patient warning will only be shown if one or more delivery-type locations have been defined in Analyst in addition to the patient being flagged as having signed up to the delivery service.



Moving Bags

Bags can be moved from one location to another using Handout. Scanning a new location label or by pressing the Assign location button with the bag already in storage will prompt you giving the option of moving the bag to a new location or assigning an extra bag to the new location.



Patient Search

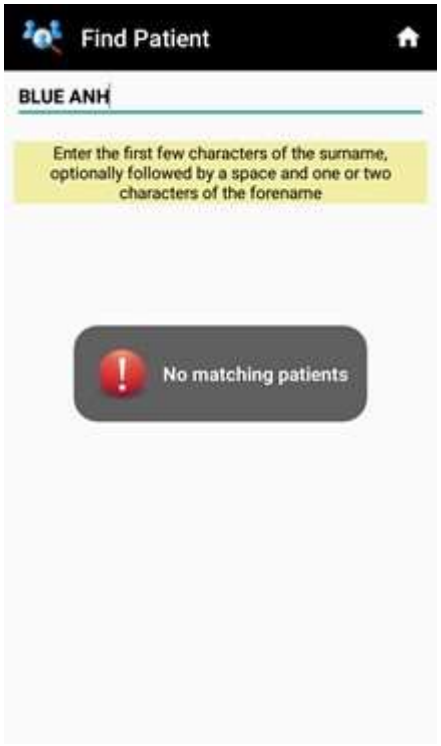
This is accessed from the Home screen by the selecting Patient Search button or during the handout process when a patient's representative is selected.

Find Patient

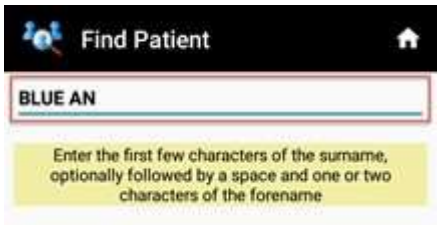
To identify the patient for which the bag in being handed out to, type in the patient's name, starting with their surname and select the search icon. Entering less detail will increase the list.

No Matching Patients

If the patient name entered fails to find a match, a warning is displayed.

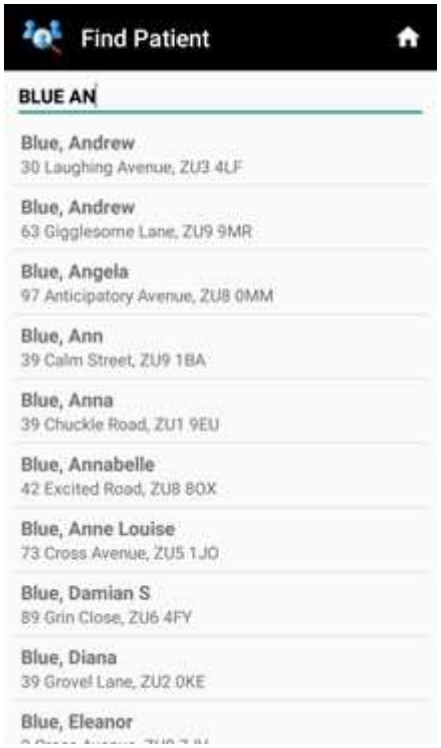


Press on the patient's name to re-enter and select the search icon.



Matching Patients

A list of patients matching the search criteria will be displayed. Select the patient for which the bag is being collected for to display the Patient Handout screen.

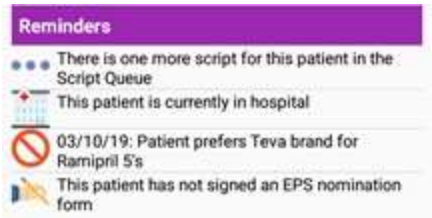


Handout Bag

The Handout Bag screen begins the handout process for the selected bag or container.

Reminders

Reminders appear at the top to ensure they are read before handing out medication to a patient.



Medication collected by

This confirms who is collecting the bag, the patient or a patient's representative. If the patient's representative is chosen, the Find Patient screen is displayed.

Collections Details and Bag Locations

For the initial bag that it selected for handout, the Collection Details section is displayed with the prescription reference, the number of items per bag, the charge (if applicable) per bag, along with the surgery and doctor or just the container reference and prescription reference when Containers has been enabled.

For each bag the location of where the bag is stored is also displayed.

View Contents

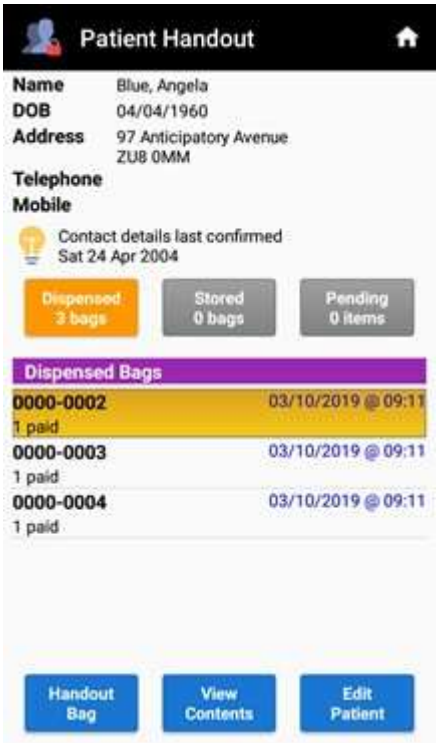
Selecting the View Contents button will display the Bag Information screen.

Edit Patient

Selecting the Edit Patient button allows the patient detail to be edited.

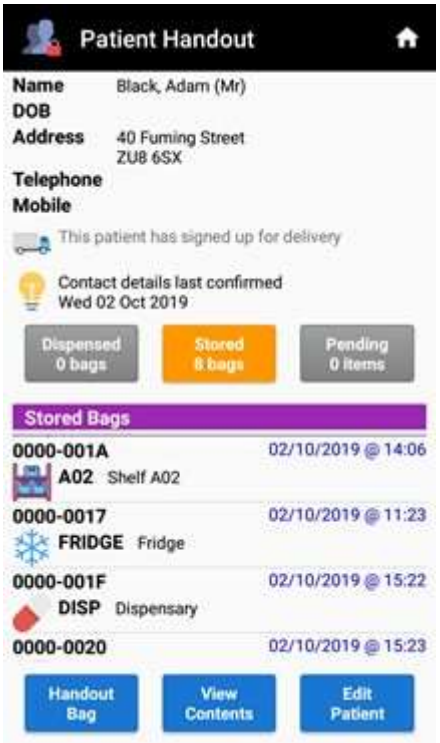
Dispensed Bags

With no storage locations created, the Dispensed button will display a list of all dispensing sessions for the patient.



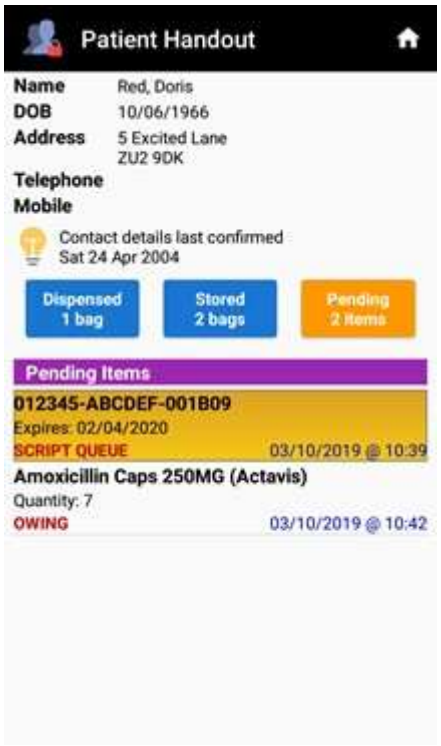
Stored Bags

When storage locations have been created, the Stored button will display a list of bags that have been allocated to a storage location.



Pending Items

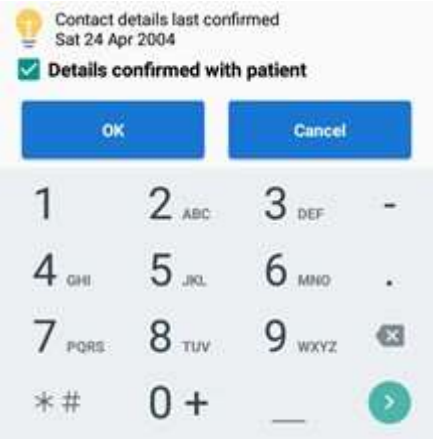
Again, with storage location created, the Pending button will display medication that is outstanding for the patient. This could be any un-dispensed electronic scripts annotated with SCRIPT QUEUE, owed medication annotated with OWING or medication that has been sent to the central dispensing system annotated with CENTRAL Rx.



Patient Details

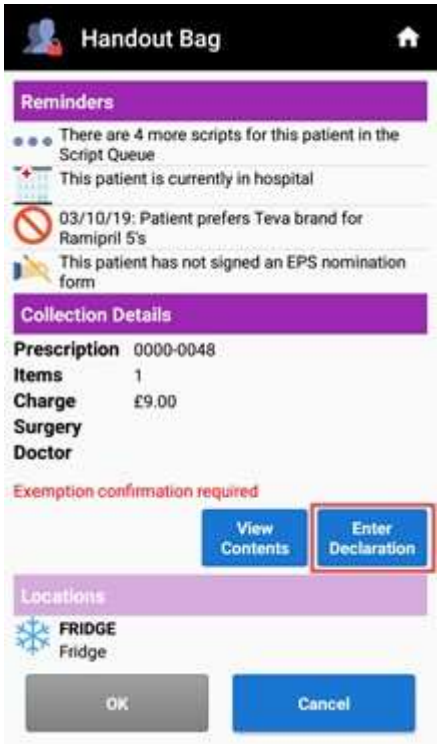
When the Edit Patient button is selected, the Patient Details screen allows you to amend information about the patient contact details.

At the base of the screen, tick the 'Details confirmed with patient' checkbox to confirm with the patient that their contact information is up to date.



Declaration

Before the medication can be handed out, the proof of exemption must be confirmed for each bag being handed out. Select the Enter Declaration button.

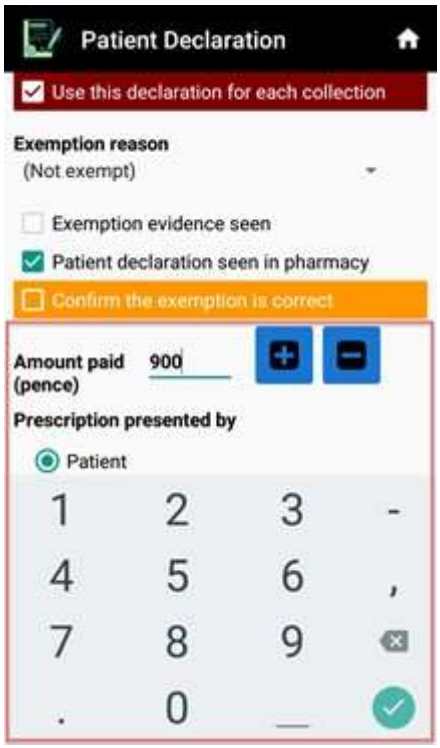


Check that the Exemption reason is correct. Select the reason to change the exemption if applicable. Enabling the "Update patient's exemption status when changed via Declaration" option in the Dispensing section on the Option tab of the PMR System Configuration dialogue in Analyst will also change the exemption status on the patient's record when modified through either the Patient Declaration dialogue within Analyst or on the Patient Declaration screen.

Non-exempt patients

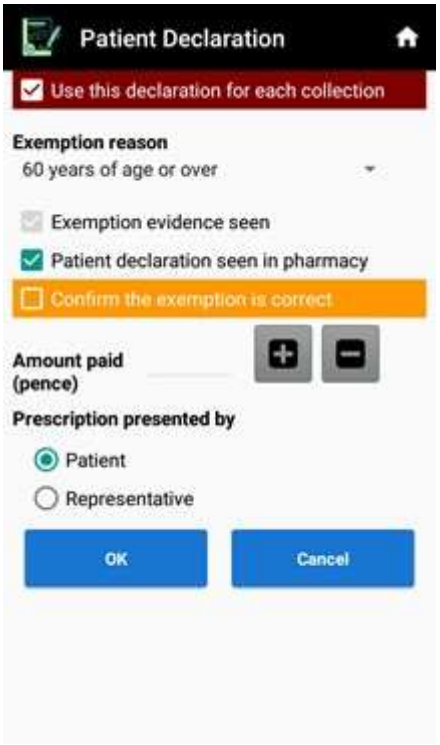
If the exemption reason is '(Not exempt)', the Amount paid is defaulted to the number of paid items multiplied by the current NHS prescription fee.

The amount paid can be adjusted by clicking on the plus and minus icons or by clicking on the price and entering the price in pence and press. Click on the green tick icon to accept.



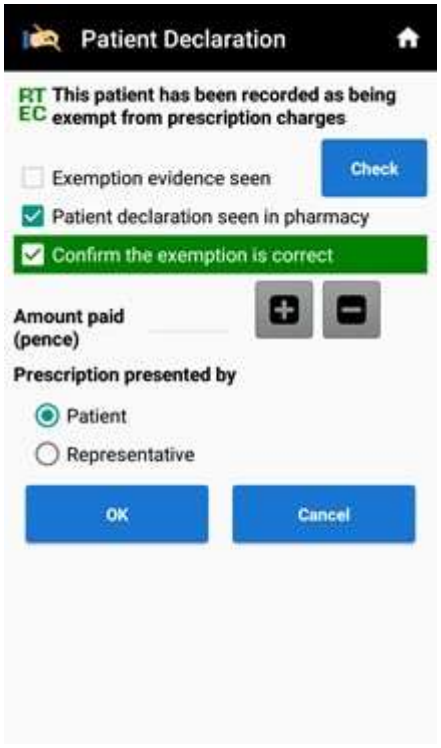
Exempt patients

If the patient is exempt, the exemption reason is shown as per the prescription.



Real-time Exemption Checking (RTEC)

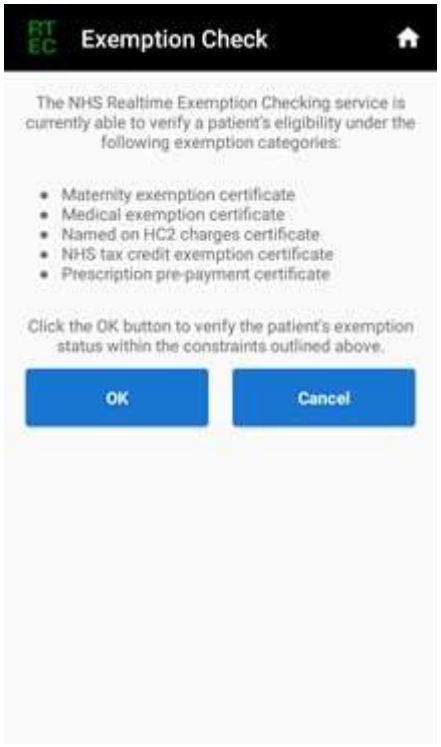
If the patient's exemption has been verified by the RTEC service, confirming the patient's exemption status will not be required and will move onto Collection. If the Enter Declaration button is pressed for a RTEC verified prescription, the outcome is displayed.



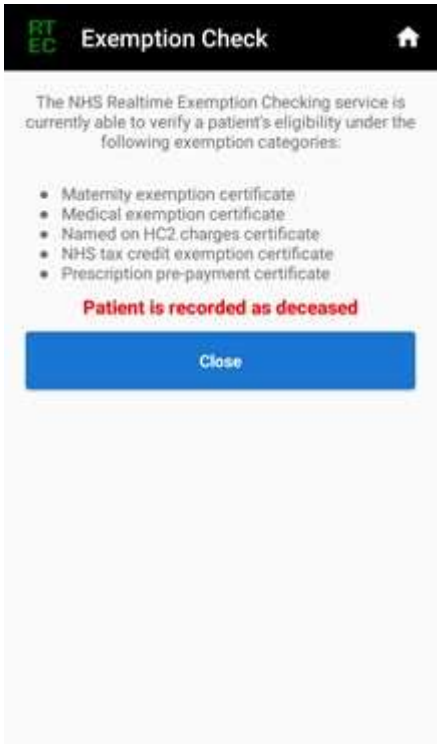
If no exemption was found for patient, this does not necessarily mean that the patient is required to pay for their medication as the pharmacist may use their discretion to the medication, an **Override** button can be pressed to allow you to manually select an exemption reason.

RTEC checking

The Check button will only appear if RTEC is enabled on Analyst and will be shown regardless of the original source of the prescription exemption information. This button can be pressed in order to initiate a call to the RTEC service directly from Handout and will first present the user with a list of the categories that are currently covered by RTEC.



To continue the check, click on the OK button. If the service responds normally, you will return to the Patient Declaration screen, displaying the exemption status that has been returned by RTEC. If the exemption check cannot complete, then an error message will be shown which can be acknowledged with the Close button to return back to the Patient Declaration screen



Declaration for Multiple bags

If the patient has multiple bags available for handout, these will be listed together. If the 'Use this declaration for each collection' option is ticked, by editing a declaration details for one of the prescriptions will indicate to use the same details for the additional prescriptions that are being collected. However, editing the patient details for each prescription can be done for each script if preferred and whether the checkbox is ticked or unticked is determined by the 'Sync multiple declarations' option on the Settings screen.

Confirming the exemption

Press on the "Confirm the exemption is correct" checkbox as proof that the exemption has been confirmed.

NB. Prescriptions in Scotland or Wales do not need to tick the "Confirm the exemption is correct" checkbox.

Press OK to accept the exemption details.

Collected

Once the exemption has been checked and confirmed, each bag or container that is being handed out to the patient (or representative) needs to be marked as collected by ticking the associated Collected checkbox or by scanning the container barcode, before pressing the OK button to complete the collection.

Single item

Where a bag or a container only holds the medication item for one prescription, and the container is the only one for the prescription, the Handout screen will include a single Collection Details section.

Additional prescriptions

If the patient has any more uncollected prescriptions, the single Collection Details section will be followed by zero or more Additional Collection Details sections.

Prescription with multiple containers

If the medication for a prescription has been placed into more than one container, the single Collection Details section is followed by one or more Linked Collection Details for the extra containers that have been used for the prescription. These sections will be followed by the zero or more Additional Collection Details sections if the patient has any more uncollected prescriptions.

If any of the Linked Collection checkboxes remain unticked when the OK button is pressed, an alert will display to warn you that you may be inadvertently not handing out all of the containers for the patient.

Containers holding more than one prescription

If a container holds the medication for two or more prescriptions, then the Handout Bag screen will contain two or more Collection Details section, one for each of the associated prescriptions. These sections will be followed by zero or more Linked Collection Details sections if any of the prescriptions have themselves been placed into multiple containers, and then zero or more Additional Collection Details sections if the patient has any more uncollected prescriptions.

The individual Collected checkboxes in the various Collection Detail sections will behave as one when a container holds medication from multiple prescriptions; ticking one checkbox will automatically tick the others and unticking one will untick all.

Collection of Local vs Hub dispensed items

If a prescription contains a mix of local and hub assembled items, the Additional Collection Details pane contains Local medication and Hub medication checkboxes, which can be adjusted in order to confirm which items are being collected.

Dispensed Drug Checking

The Dispensed Drug Check feature provides the facility to check that the correct drug label has been stuck on the correct medication item.

A unique barcode is printed on the dispensed drug label under the normal text. Turning the barcode printing on is done through Analyst on the Labels tab of the PMR System Configuration dialogue. In the Label size field, select the appropriate size of label you use with '[DCL]' at the end.

Workflow

A Dispensing Check is started by scanning the barcode on the medication label from the Home Screen. The Dispensing Check screen is displayed with details of the medication that should have been dispensed and the name and address of the associated patient.

After scanning a Dispensing Check label, the EAN barcode on the item should be scanned in order to verify that the label has applied to the correct product. If the expected product or an equivalent item with the same drug pack size and from the same drug family is scanned, the top of the screen is updated as shown below and a confirmation sound will play.

If the item barcode does not correspond with the expected product when scanned, the top of the screen is updated as shown below and an error sound will play.

Or if the barcode is not recognised, the top of the screen is updated as shown below:

Acknowledgement of Errors

To prevent further scanning of barcodes when an error occurs, a user must acknowledge the previous scan by clicking the Clear Error button before continuing.

This acknowledge can be removed by unticking the "Require acknowledgment of errors" checkbox in the Dispensing Check section on the Settings screen.

Bag Selection

Currently the Bag Selection button is disabled. However, this will be selectable in a forthcoming update of Handout Manager.

Reset Packs

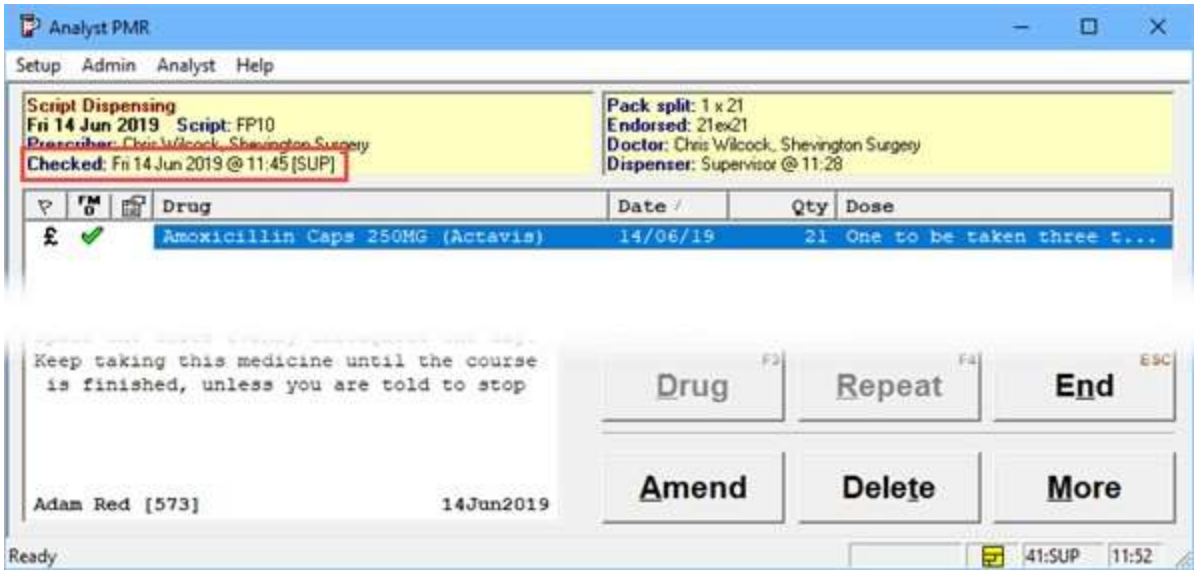
Selecting the Reset Packs button will clear any packs that have been scanned.

Edit Patient

Selecting the Edit Patient button allows the patient details to be edited.

A new dispensing check can be started by simply scanning the next Dispensing Check barcode while on this screen.

Confirmation of the dispensing check can be seen by expanding the session in Analyst.



Analyst Stock Entry (Stock Control and Stocktaking Procedures)

Before counting a single line, you need to have a good idea about how you're going to perform the stock check and there's a lot of good work you can do in the weeks and months working up to a stock count.

Pre-Planning

Run down the stock

It's easier to count the stock when there isn't much of it. Try running down the stock in the month or two before a stocktake.

Tidy up

It's also a lot easier to count the stock when it's neat and tidy. Why not precede the count with a deep clean of the shelves?

Date checking

Date checking is better paired up with the tidying of the shelves rather than the count. Counting should be a quick process so trying to clean, tidy, date check and count will slow the job down and create other problems.

Staffing

Will you have enough staff? It's a monotonous task, but counting stock requires concentration. If your stock taker is also expected to serve customers, answer the phone and deal with other queries it will slow down the count and increase the chances of lines being missed and mistakes being made.

Splits

Your Android device can count a combination of splits and full packs but it's faster and more efficient to pre-count the splits in the preceding weeks and months. Write the number of tabs/caps clearly on the box.

Keep it quick

During a stocktake the reordering will be affected and booking stock into the system will become a headache. A count should be completed as quickly as possible. Once you start, don't stop. Work in shifts. Work late. Don't stop counting.

Outstanding Orders

Make sure that all of the orders that have been received have actually been booked in (or discarded) in Analyst. Otherwise there may be recently delivered items which will be counted in the stock and then booked in again.

Stock rooms

Prevent stock from moving into and out of the stock room while you're counting.

Starting the Count

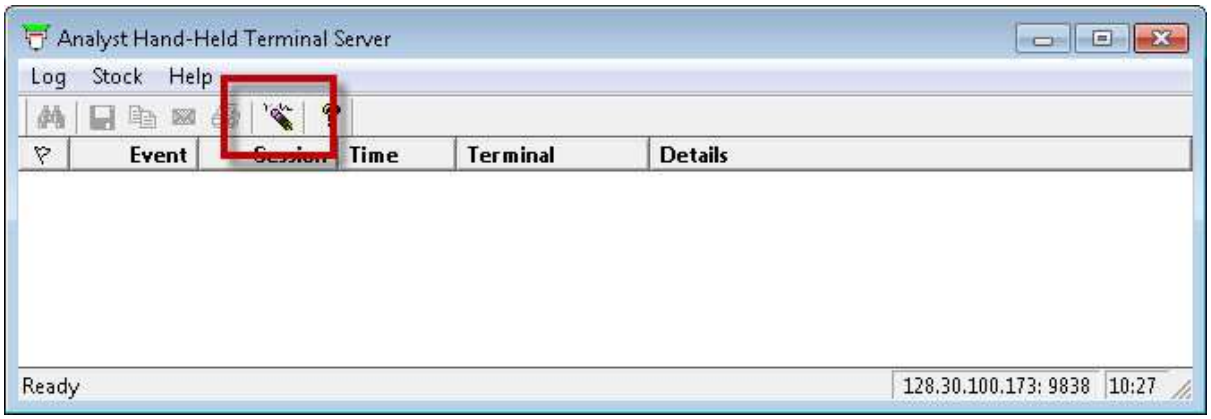
> **Important:** If the Android device has come direct from our PSL Offices, then any existing data held in the Android device should have been cleared. If you are part of a Group and are passing the Android device from shop to shop, then the data **must** be cleared before you start the count by following the clearing data instructions. Refer to the Clearing Data section on **page 84**.

Make a Backup

Some of the changes you make in the preparation to start the count and the count itself cannot be undone. Be sure to make a backup of the system before you start making changes and keep the backup safe until after the count has been completed and you're satisfied with the outcome.

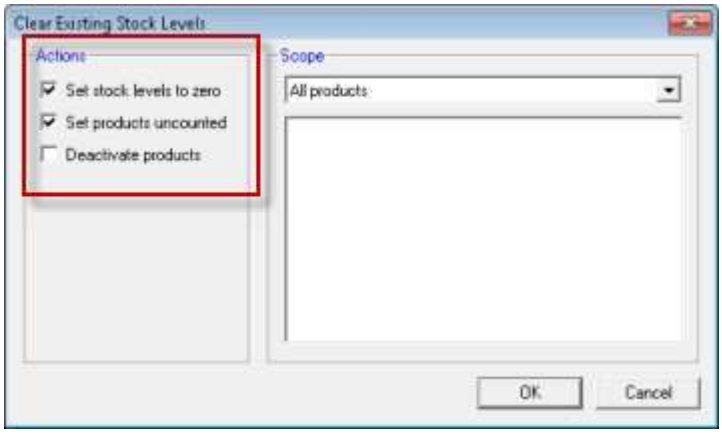
Prepare the Database

Before starting the count, you'll need to spend time preparing the database. There are 3 options that need to be considered. These are accessed through the Android device Server application by clicking on the Wand icon highlighted below



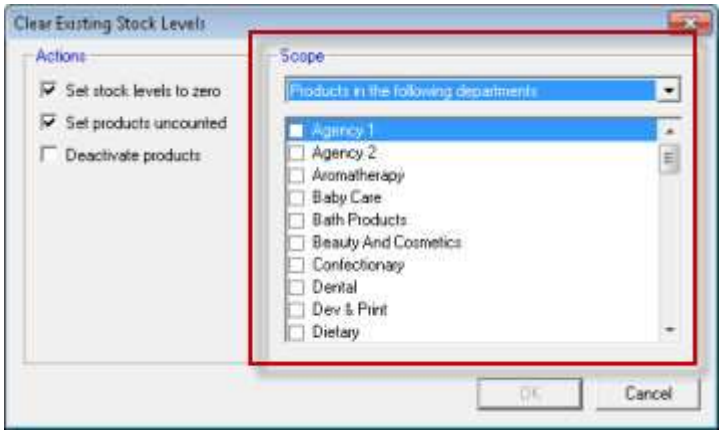
Now select which of the 3 options you would like to do:

- Set the S**tock Levels** to zero; this will then only add back into analyst stock levels what has been counted
- Set all products to **Uncounted**; this will only set product to counted what has been counted
- **Deactivating** products; this will only make counted products active and therefore only these products will appear in active product searches



The most thorough options are certainly to zero stock levels and set all products to uncounted, before starting. The deactivating is optional and doesn't need doing if you are happy with your current product searches

In addition, instead of changing the whole database, you can limit products by selecting the Scope



Usually you'd choose to affect all items before a full stock take, but if you're only performing a limited count you might choose to reduce the scope of the zero/uncounted/deactivation. If you select a date, department, manufacturer, etc. the bottom panel will change to allow you to refine the affect.

Once you are satisfied with the options selected (as they CAN'T be undone), Click **OK.** You are now ready to start counting

Outbound Orders

Carefully check your outbound orders. From the moment you zero the stock, your ordering might be affected. If you use Background or Demand Auto to calculate the reorder quantities this will now temporarily become the replacement method and will reorder what you have used since you last ordered the item. As soon as the product has a counted stock figure the automatic calculation will be reinstated.

Inbound Orders

THE most confusing part of stocktaking is working out what to do with orders that have arrived while your mid count. You have two choices:

- Count the delivery as part of the stock take and discard the corresponding inbound orders on Analyst so they are not booked in as well, which would double count them. Do not put this stock away in areas which have not yet been counted. It's probably best to keep them in the boxes until the count is complete.

- Do not count the delivery as part of the stock take but book the stock in by receiving the order. Leave the order untouched until the count is complete and book it in as normal. If you book it in while the count is still in progress you risk either overwriting the stock figure with the amount on the shelf before it's put away or double counting it, if you're using the Stock Merge Tool.

Either way will generate errors because some items will go straight out for items labelled yesterday or required urgently right now. For perfection, keep a note of the items which are taken from the box and recount them once the stock take is complete and the orders have been accepted/discarded.

Merge the Stock if you're Using Restricts

If you use Restricts in the dispensary you are unlikely to be counting the brand of generic that you're selecting on the PMR. The Analyst Stock Merge Tool allows stock levels to be transferred to items marked as Restricts from of items in the same drug family with the same pack size.

If you're using this tool use it regularly. Every half an hour or so is good. Otherwise you might start to get some unpredictable results if the stock of your restrict has drifted negative as a result of dispensing activity while you're counting an alternative brand.

Branded Items/Branded Generics

The Stock Merge Tool provides the option to ignore branded items. You don't want your shop's Piriton tabs to be merged with your dispensary's chlorphenamine tabs. But there are an increasing number Branded Generics which, because they're brands, the Stock Merge Tool will leave alone. If you want your branded generics to be included in the generic count you'll have to select a true generic brand when counting, rather than scanning.

Analyst Stock Merging Tool

When counting stock, it's important, from a reporting perspective, that the stock is counted onto the product that is dispensed. It's very common to use a common record to dispense to maintain a common record for dispensing history and usage figures but to hold many different brands.

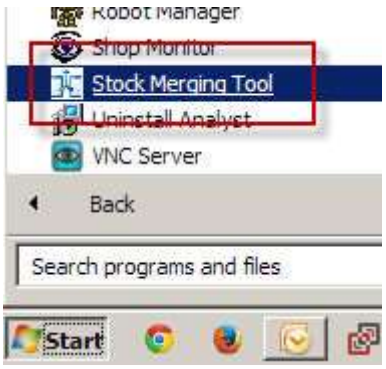
The stock merge tool will allow the stock levels to be counted with a scanner, so counting actual brands, and then move those stock levels onto the product that is used. The pre-requisite for this is that the target product is one of the following.

- The target of a Product Substitution
- The target of a Family Substitution
- A generic restrict
- An Albapharm restrict
- An Edinpharm restrict

To run the process, open the Stock Merging Tool. Minimise all open programs.

Windows 7, Click on the Start button bottom left corner of the Windows taskbar. Click on All Programs, Select the Analyst folder and click on Stock Merging Tool.

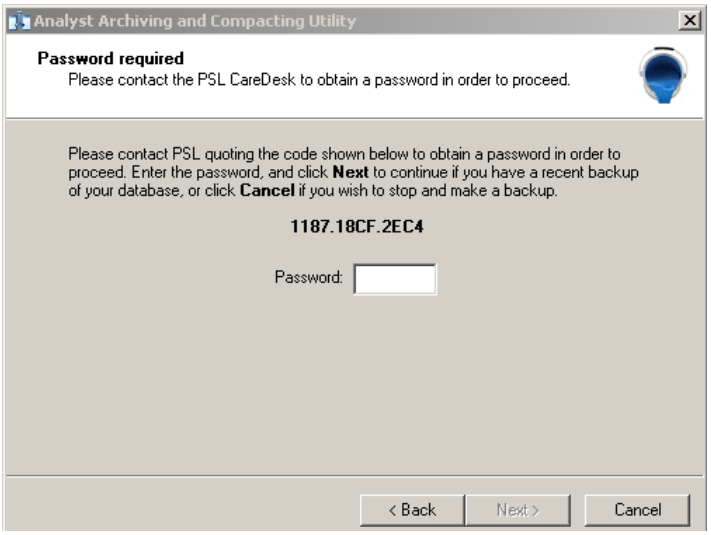
Window 10, Click on the Start button bottom left of the Windows taskbar. Select the Analyst Folder and click on the Stock Merging Tool.



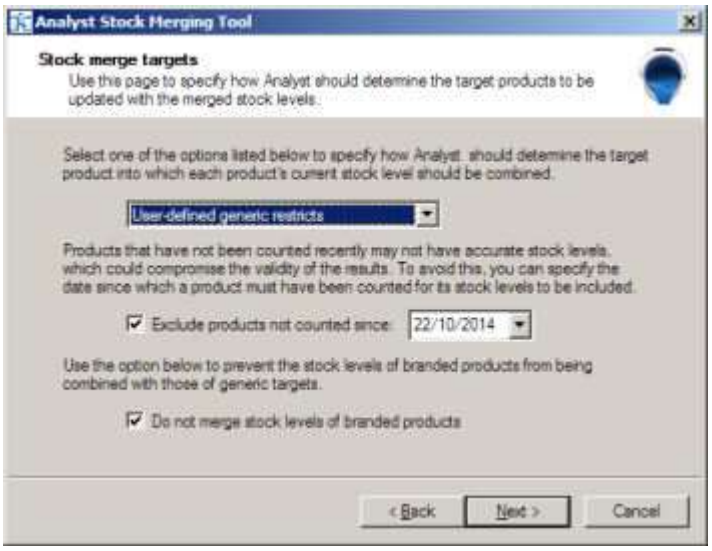
The wizard will now open on the introduction page which provides an overview of the process.

Click **Next** to continue.

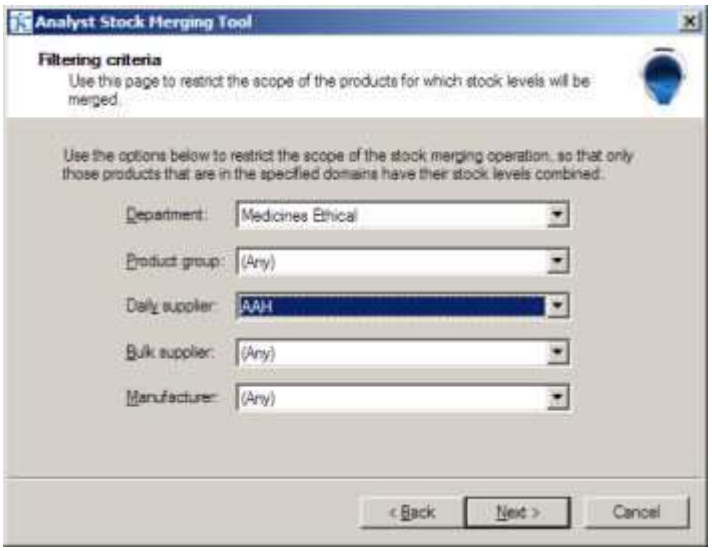
Before you can continue, you will be asked to call the Service desk for a password. To proceed, quote the Code generated and you will receive a code to enter. Once the code has been entered, click **NEXT** to continue



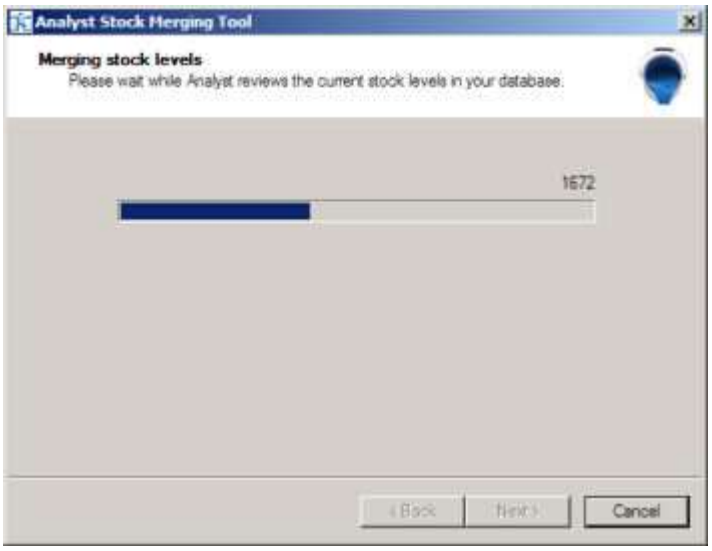
Select the merge targets from the drop down box. These are the items that will hold the stock once complete. The extra boxes allow products which have not been counted for a while to be ignored and to leave the branded items' stock levels alone. Click **Next** to continue. Note that items which have a negative stock level will not contribute to the target product regardless of when they were counted.



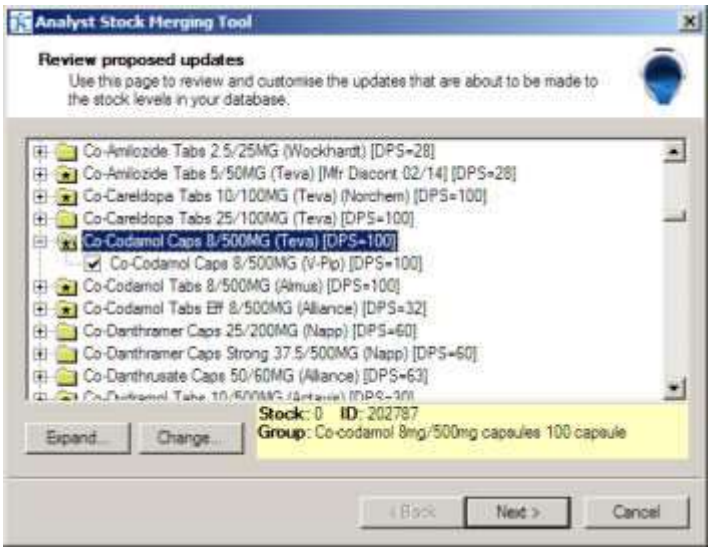
The final screen before the process runs is to decide the scope of the merge. Select from the drop down boxes which areas of the system to affect. If more than one option is selected the affected products must lie in all groups. In the example above only products in the 'Medicines Ethical' AND have a daily supplier of 'AAH' will have their stock levels merged. Click **Next** to run the process.



The progress bar will provide an indication of how many products are gathered in preparation of the merge. It will look for all products that match the criteria on the last page and then find a candidate product in the same drug family to receive the stock. When the search process is complete the screen will change.

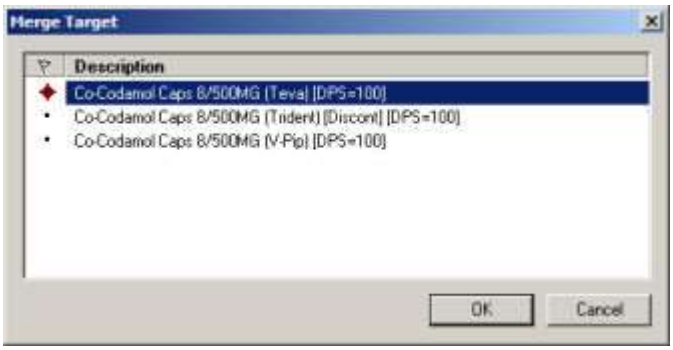


Each merge candidate is listed in this screen with the recipient of the stock displayed at the top level. Click on the plus next to the folder to reveal the products whose stock levels will be transferred. Use the **Expand** button to open the product editor for the highlighted product.

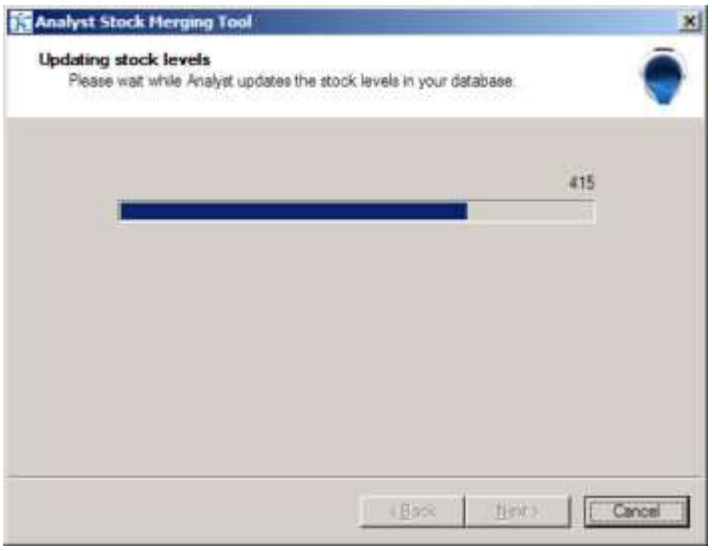


If you're using Restricts to merge products, it's possible that there might be more than one product suitable to add the stock into i.e. more than one restrict in the drug family. In this instance the folder is displayed with an asterisk and the candidate to merge into was the first one found. If you'd like to look at alternatives and possibly change it click the **Change** button.

The current merge target is highlighted with the red diamond. To select a new merge target highlight it and click **OK**.



When you're happy with the list of stock levels it will move click **Next** to move the stock levels.



When complete is a summary screen is displayed.

A full log file is generated each time the Stock Merge Tool is run to the end. To view the log from this instance, click on the hyperlink on this final screen. The logs are retained if a query arises in the future.

Will the stock level of the target be overwritten or added to?

The stock levels of the contributing products will be set to zero and the counted date set to today. What happens to the stock level of the target product depends entirely on whether or not its stock has been counted recently. If the Last Counted date of the product is equal to or more recent that the date specified at the start of the merge wizard it add the contributing stock to it, on the basis that if a recent stock count has been performed it is reliable. If the Last Counted date is older than the specified date in the wizard the stock level is discarded and is overwritten with the sum of contributing stock levels. The Last Counted date of the merge target is updated to today. The only exception is where the target product has a negative stock level in which case it will always be overwritten.

This means that more than one merge can be performed in close succession; imagine at the start of a stock count that a generic header (AAH) is used to dispense but no actual stock is held against it [uncounted or not counted recently] and another brand is stored on the shelf (Teva) and has been counted as part of the stock check. The (Teva) stock level will be transferred to the (AAH) product and will overwrite the stock figures. (Teva) will be set to zero and counted today. (AAH) will have the merged stock level and be counted today.

If another brand of the same generic is counted later in the count and the merge tool is run again it will be fine. (Actavis) is counted as part of the stock check and the (AAH) is still counted today from the previous merge so when the stock is merged the (AAH) is trusted and the (Actavis) stock is added to it leaving the (Actavis) set to zero and counted today. The (AAH) therefore holds the stock levels of both the (Teva) and (Actavis) brands regardless of the fact that the merge is done once or many times.

Analyst Stock Entry

Once the Android device has been connected to Analyst, open the Analyst Stock Entry software on the Android device with the icon on the devices home page. If you're connected to the Analyst database while you scan items, the changes are immediate and is referred to as an 'online' stock check. If you know you're going to go out of range you can prepare the Android device for an 'offline' stock check which doesn't require an active database connection.

The main screen displays a list of counted lines in the top section and shows a keyboard beneath with some extra buttons.

Understanding the Buttons

Keyboard button		Adds or removes the keyboard from the bottom of the screen
Options button		Displays the options within the software
Plus button		This increments the count by one pack/unit. Long press this button to turn it into a **Less** button which reduces the count by one pack/unit.
Minus button		Subtracts the entered number from the stock count
Tick button		Replaces the stock count/price with the entered number
Cross button		Cancels the number entry
Pack Mode		Allows entry in whole packs
Items Mode		Allows entry in individual items (where a pack is splittable)
Code		Allows a barcode number or PLU to be added manually if it doesn't scan
Price Mode		Allows the price of the item to be entered
Find		Allows an item to be searched for by description rather than scanning it
More		Increase the count by one unit/pack (depending on current mode)

Less	LESS	Reduce the count by one unit/pack (depending on current mode)

Ad-Hoc Stock Counts (Online)

Use the round button on the bottom of the Android device to fire the scanner laser out of the top window and scan the barcode of your first item. The Android device will beep when the barcode is scanned and will make another sound, if configured to do so in the settings, to tell you if the barcode has been recognised or not.

The item will appear in the counted products list with the price, pack size and the stock count. To increment the stock count by one you can scan the item again (note the different sound because it's already in the counted products list) or type the count into the keypad at the bottom and click the **TICK** button.

Adding stock to the count

In addition to repeated scanning to count more of the same item you can type an amount on the keypad and click the **PLUS** button. This adds the amount you've entered onto the existing stock level.

> ***NB**: By scanning the item, you've already added 1 to the count*

More on scanning modes can be found on **Page 88**.

Searching for Items by Description

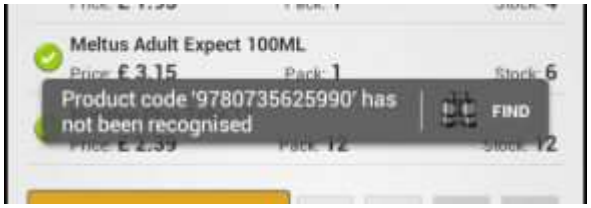
If an item won't scan you can search for it by description by using the **FIND** button.

Type in a small amount of the description, just like you'd do on Analyst, and click the **Search** button (the magnifying glass) at the bottom right. The results are displayed in a list.

The usual tick/cross/question mark will display the active lines and whether there is any stock currently recorded in Analyst. Select the item you'd like and it'll appear in the counted list on the main screen just like the scanned items. Add the count as normal.

Linking Unrecognised Codes to Products

During the count, you're likely to scan a code which is not recognised by the Android device. When you do, it will make a noise and display a message with a **FIND** button on it.



Click the **FIND** button and go through the process of searching for the item by description. When you select an item it not only adds it to the count, but also adds the barcode that was scanned to the product record so it will now scan in Analyst.

Creating New Products

If you can't find a match for an item, click the **Create** button at the top right. The product creation screen appears.

Type in the Description of the item, making sure you're as specific as possible, along with the Drug Pack Size, if it's a splitable dispensary pack and Retail Price. The product code section will fill automatically from the code you scanned to start with so just click the green tick at the top right or **Done** at the bottom right (which says **Next** until you're on the last field).

The product is immediately created in Analyst with the information you've provided. Don't forget to improve the product record on Analyst to add extra information like department, daily supplier, re-order method, cost price and buying codes.

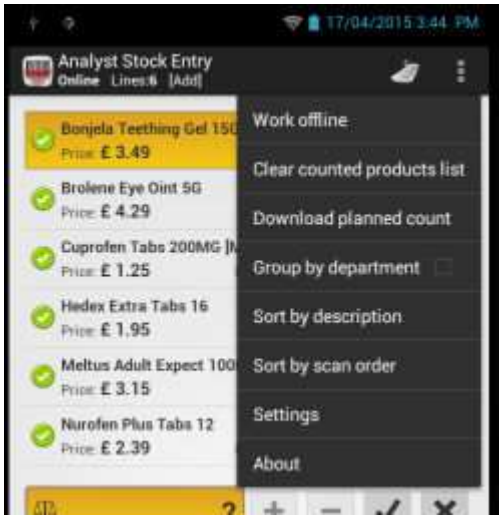
Counted/Planned Products List

During ad-hoc counting the product list is displayed in the main panel of the screen. Or during a planned stock count the items you need to scan are displayed in the same place.

To help you keep track of your count this screen can be organised in a number of ways, or cleared entirely.

Organising the List

Using the menu button at the top right the scanned items can be organised either by description or by the order in which they were scanned.



If it's configured in the settings, there may also be an option to group the items by department, supplier, manufacturer etc. When performing a planned count the option to sort by department is always available. When grouped, the items are separated by headings which can make things easier to find.

Clearing the Counted Products List

Between counts this screen should be cleared. If you're moving between different shops you could accidentally pollute their stock levels with the count of the previous shop. Use the options button and select 'Clear counted products list'.

Try not to clear the screen mid-count as this removes the facility for the Android device to tell you if you've already scanned something.

Planned Stock Counts

A specific list of items that should be counted can be generated using the Rolling Stock Counts facility in Analyst. Follow the instructions in the topic covering that feature for details on how to create them.

To download these counts to your Android device, click the menu at the top right and select the 'Download planned count' option. Analyst will pass any outstanding counts to Android device and display them in a list.

The number of the count, which corresponds to Analyst, is listed on the left and the number of lines in the count is shown in the centre. Select the count to work with by clicking it. This is an offline activity so there is no requirement to stay in range of the wireless connection to Analyst except when you're downloading or saving counts.

The contents are displayed and may be sorted or grouped depending on your settings.

It is now your job to find the items in the list and count their stock.

Ideally the item should be scanned to confirm that it matched the item on the list. Once scanned and matched enter the count. If the item cannot be scanned highlight the item in the list and enter the count. If you are certain there are none of an item enter a count of zero. You cannot scan and count that are not in the list.

> ***NB**: You cannot scan and count items that are not in the list.*

Completing the Count

Once you have counted as much as you can you should update Analyst with the stock levels before they change. Select the options button at the top right and choose 'Save planned count'. The stock levels are transferred and update their relevant products immediately.

If do not wish to save the count or it has been a while between counting the lines and stock levels may have changed select the 'Abandon planned count'. This will not save any changes and the count must be redone if required.

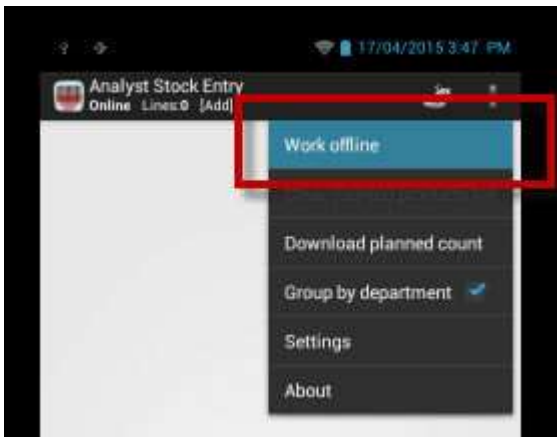
Offline Stock Count

If you don't expect to be within wireless range of your Analyst system when conducting the scan, you can Work Offline. This will use a snapshot of the database to identify the products when they are scanned. New stock levels and prices will be stored until the Analyst database is updated.

The offline stock counting is not suited to counting the shop floor or dispensary while you're trading. By the time, you've downloaded the count the stock may well have changed thanks to sales or prescriptions. If you must count active areas of the shop, make sure you download the stock counts regularly.

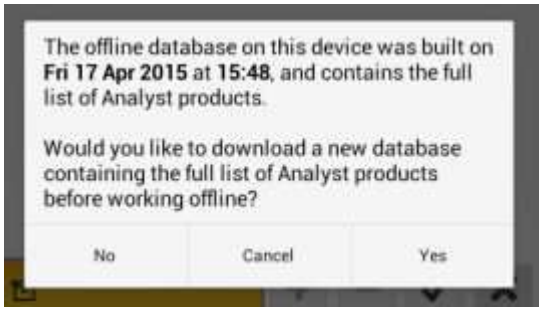
Going Offline

Use the options button at the top right and select the 'Work offline' option.



The Android device will display when the last snapshot of the database was taken and offer to build a new one.

***NB:** If this has already been done by our Workshop then the following box will not appear and it will start to prepare the Offline database*



Click **No** if you're happy with the current database and there have been no significant changes since building it, **Cancel** to return to the previous screen and stay in online mode, or **Yes** to build a new database. Building a new database will take up to 3 or 4 minutes depending on the settings and whether or not you're just using the Active products list.

When the new database transfer is complete, or if you decline to build one, the screen will return to the Stock Entry screen but the icon at the top left will have changed to indicate that you're offline.

Counting Offline

The process of conducting the count offline is just the same as an online ad-hoc count. The counting of items is only permitted if your Android device is not set to 'Retain' the stock levels in the settings. Don't forget that any stock levels and prices that are entered will not be applied to the Analyst database until the count is saved and resynchronised with Analyst. Unrecognised codes can still be linked with existing items and new items can be created.

Saving the Count

To update Analyst with the count on the Android device click the options button at the top right and select 'Save offline count'.

Once selected the count is transferred and the counted products list on the Android device is cleared. The stock counts, prices, new codes and new products will all be applied to the database.

Abandoning the Count

The offline count can be aborted by selecting the options button then 'Abandon offline count' at which point the counted lines are cleared and the offline working is closed. Nothing is transferred to Analyst and all activity done offline is lost.

Entering Prices

If the retail source of an item is set to User Maintained, the retail price can be changed at any time during the scanning. This is done by highlighting the item and clicking the **PRICE** button.

Type in the new price of the item and click the **TICK** button. If you make a mistake click the **CROSS** button and retype the price. The price is changed immediately if you're counting in online mode.

Pricing Mode

If you want to the scanner just for prices and not affect the stock levels, you'll need to change the settings to 'Retain existing stock levels' to prevent you overwriting the stock.

Locked Prices

If your prices are controlled from another source like the C&D or your Head Office, you might not be able to change the price using the Android device. The **PRICE** button will not be available for such products and the Android device will revert to stock count mode. You will need to switch it back into price mode after scanning the next product.

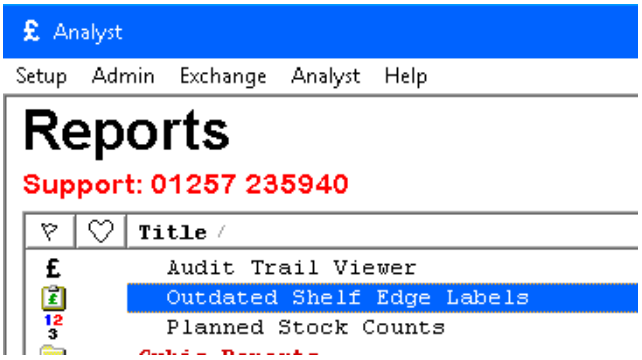
Shelf Edge Labels

Your Android device can request a new shelf edge label for items which have had their prices changed. Depending on the setting in the Workflow section the request can be automatic when a price is changed, or only when you specifically request one.

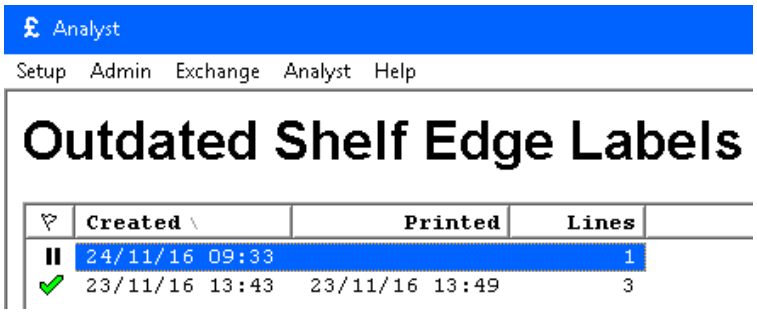
You can request a new label at any time by long-pressing (for a second or two) the **PRICE** button. When a price label is going to be requested a 'price tag' icon appears next to the price of the item, on the Android device. Long-press turn cancel a request.

The product within analyst needs to have a Retail Source of User Maintained. If the price is locked, you will have to print shelf edge labels through Analyst.

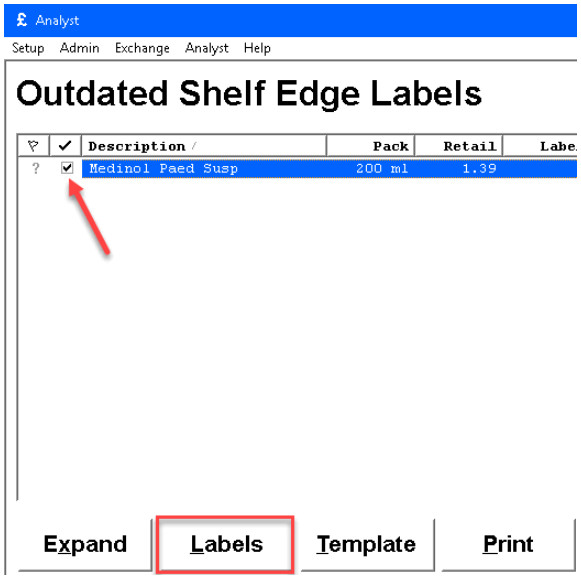
To print the labels, click on Reports, then highlight **Outdated Shelf Edge labels** and click on the **Run** button.



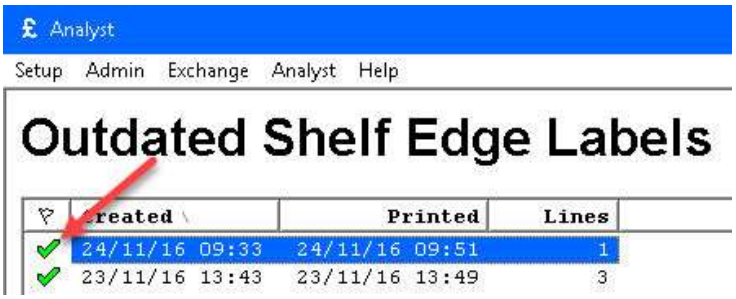
This displays any created reports listing all products that have had a price changed by the Android device.



Highlight and click Expand. This will list the products. Next to each product is a tick box. For any that are ticked, click on the **Labels** button to print new shelf edge labels.



Once the labels have been printed, confirmation will be shown.



Clearing Data

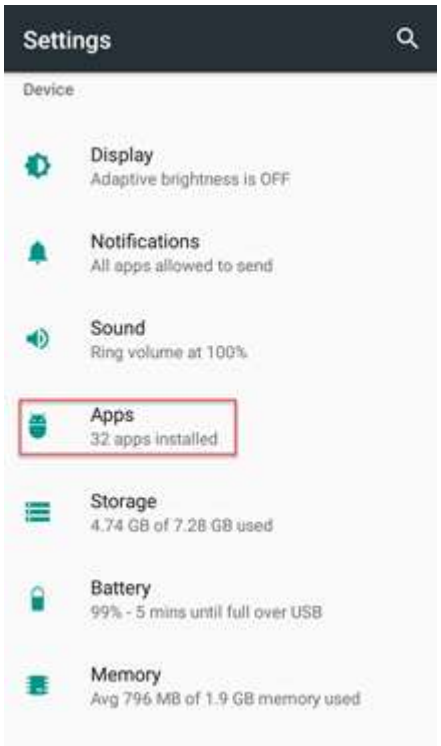
Follow these instructions to clear existing data from the Android device.

Turn the unit (part **A**) on (button located top right) and **Swipe Up** to unlock.

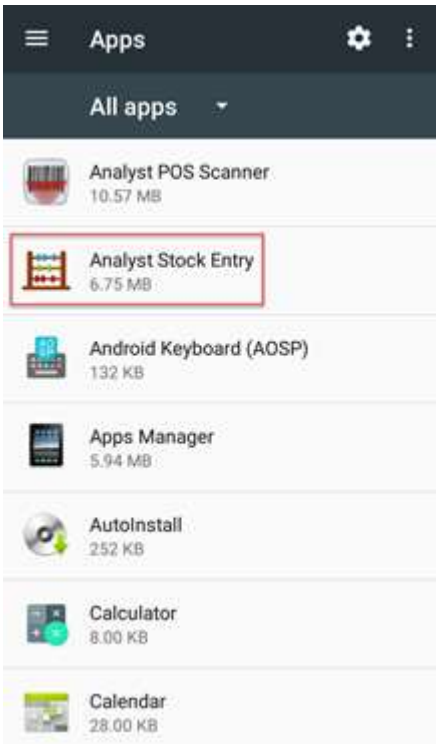
Swipe Up on the Home screen.

Click the **Settings** icon.

Click on **Apps.**

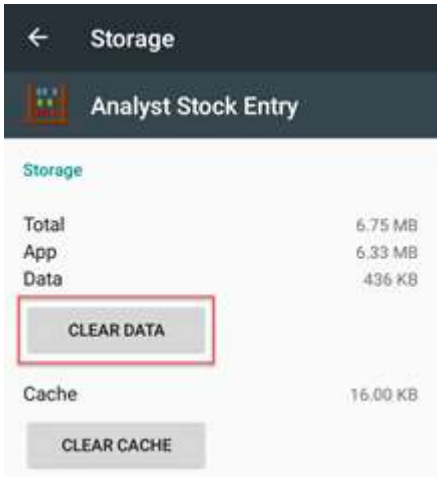


Click on **Analyst Stock Entry.**

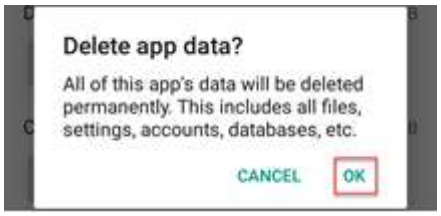


Click on **Storage**

Click on **Clear Data.**



Click on **OK.**



Click on the Android device **Home** button.

This will default the IP address to a local setting so the IP address will need to be re-entered, refer to Connecting the WAP.

HHT Settings

Analyst HHT Server

Server connection method

This determines which connection method the Analyst Stock Entry should use on the Android device to connect to Analyst. Set the system up to use Wi-Fi.

Server host name or IP address (Wi-Fi only)

Enter in here the address of the Android device Server application which is running on your Analyst terminal. The address is displayed in the bottom right of the Android device Server window.

Server port number (Wi-Fi only)

This is another technical setting and should match the Android device Server application. The port number is shown in Android device Server after the IP address. You should not normally need to change this. (Default setting: 9838)

Server Bluetooth connection (Bluetooth only)

This option is reserved for future use. This lists all paired devices to the Android device. Select which one is currently active and being used. If it is not listed, then use the **Scan** button to look for other devices.

Analyst Stock Settings

There are a number of configuration options within Analyst Stock Entry on the Android device. Open these by clicking the options button at the top right and selecting 'Settings'.

Workflow

Scanning mode

Select whether the initial scan should 'Add' which will show the current stock level and add one to the existing stock level or should 'Replace' which doesn't show the existing stock level and replaced the stock level with one. The 'Interactive stock update' tries to determine whether or not you've already counted the line and adds or replaces accordingly. Whichever option is set there are easy ways to add and replace while counting. (Recommended setting: Add)

Group products

When scanning items during an ad-hoc stock check they can be displayed in groups of departments, product group etc. Select which grouping to use, if any. (Default setting: Do not group products)

Price check labels

Analyst has the facility to print off Shelf Edge Labels for certain items that have been scanned. Turn this option on to request a new label for each item whose price has been changed. If the option is off a long-press on the **Price** button will be required to request a label. (Default setting: OFF)

Offline Working

Download full database

Select this option to download the full database of products, codes and prices from Analyst ready for use offline. If not selected only the Active lines in the host Analyst system will be used. (Default setting: OFF)

Retain existing stock levels

If you don't want to update the stock levels of items when you upload it to Analyst select this option. (Default setting: OFF)

Set stock levels to zero

Select this option to clear the stock levels of items in Analyst before saving the offline stock count. (Default setting: OFF)

Set products uncounted

Select this option if you want to clear the 'last counted' date of items in Analyst before uploading the offline stock check. (Default setting: OFF)

Deactivate products

Select this option to deactivate all items in Analyst before saving an offline stock count which will activate the counted lines again. (Default setting: OFF)

Appearance and Sounds

Volume buttons

The volume buttons on the left side of the Android device scanner can be used to Adjust the speaker volume, trigger the barcode scanner or adjust the stock level of the selected product by one (unit or pack or case, depending on the current mode).

Display keyboard above product list

This moved the keyboard to the top of the screen, rather than the bottom. (Default setting: Off)

Confirm successful scans

The software will beep when a barcode has been scanned and recognised. The scanner will always emit a beep when it scans a code, this is an additional beep to confirm that the barcode has been recognised. (Default setting: ON)

Warn on failed scans

The software will emit a sound if a scanned barcode is not recognised by the database. (Default setting: ON)

Warn when product already scanned

The software will emit a sound if the item just scanned is already in the counted products list. (Default setting: ON)

Barcode Scanner

Scanner Bluetooth connection

This option is for hardware units that have Bluetooth connection to a scanner. The paired scanning device must be paired and specified here.

Analyst POS Settings

There are a number of configuration options within Analyst Stock Entry on the Android device. Open these by clicking the options button at the top right and selecting 'Settings'.

Appearance and Sounds

Volume buttons

The volume buttons on the left side of the Android device scanner can be used to adjust the speaker volume.

Confirm successful scans

The software will beep when a barcode has been scanned. The scanner will always emit a beep when it scans a code, this is an additional beep to confirm that the barcode has been recognised. (Default setting: ON)

Warn on failed scans

The software will emit a sound if a scanned barcode action cannot be completed. (Default setting: ON)

WAP and BLUETOOTH Connection Setup

If the message "**Cannot connect to Analyst**" appears there is a problem.

Follow the instructions in the following sections to check your Android device unit settings and update if required.

> ***NB**: if the HHT has been used at another shop i.e. you are part of the Group, you may need to change the settings on the HHT unit so that your shop TP-LINK Wireless Access Point and the HHT will connect to each other.*

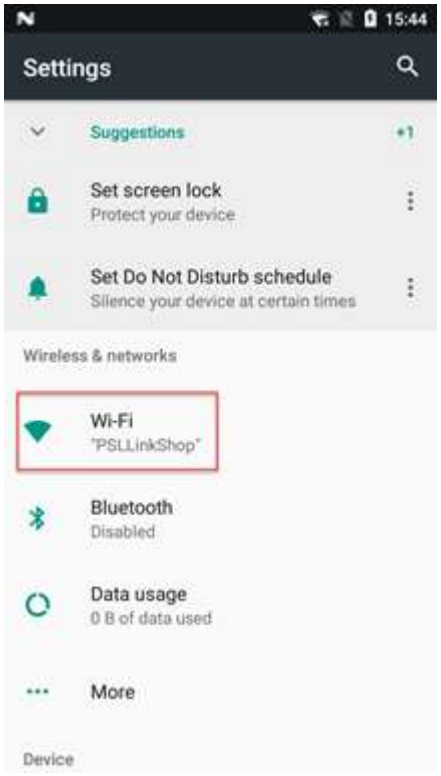
Connecting the HHT to a Wireless Network

Turn the unit (part **A**) on (button located top right) and **Swipe Up** to unlock.

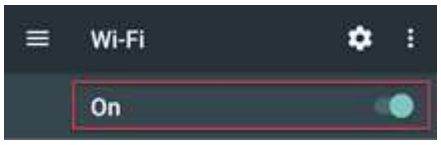
Swipe Up on the Home screen.

Click the **Settings** icon.

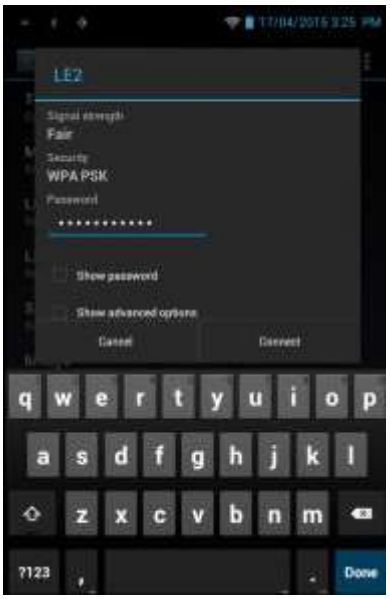
Click on the **Wi-Fi** option.



Slide the WLAN option to **ON**. You can turn the Bluetooth option off to save some battery power.



Click on the **PSLlink** and enter the password on your letter (part **J**) found in the box and click on **Connect.**



If it says PSLlink Connected press the Android device Home button.

Point the Android device to your chosen terminal by following the Connecting the Android device to Analyst instructions on **page 10.**

Connecting the Bluetooth Dongle

For the Android device unit to communicate with Analyst, the Bluetooth USB Module supplied with the Android device unit needs to be installed in one of your PSL terminals. A Bluetooth Bridge needs to install first before running the installation CD

Both the model and the CD can be found at the bottom the box by removing all the foam packaging.

Installing the Bluetooth Bridge

Choose the terminal you wish to connect the Bluetooth Module to. Ideally, it should also be a terminal which is central to the scanning area if possible.

Start by opening a command prompt on the terminal where you have installed the Bluetooth adapter.

Windows 7, click on the Start button located in the bottom left corner of the Windows task bar. Click on Run, and type "CMD" in the field at the bottom and click **OK**.

Windows 10, right click on the Start button left of the Windows taskbar and select Command Prompt (Admin).

In the black and white box that appears type

```
\Analyst\Bluetoothbridge\Bluetoothbridge -install
```

This will install the service in a few seconds and should display a message of success at the bottom.

Once complete the new service must be started do this by typing the following at the next prompt.

```
Net Start bluetoothbridge
```

This should similarly return a message of success. Your system is now ready to use. To close this window type "exit" and press enter or click the cross at the top right.

> ***NB**: This is a onetime only procedure and so if you had to run the below Installation CD on the same machine in the future, as long as it hasn't been swapped, then the Bluetooth Bridge doesn't need installing again.*

Installing the Bluetooth Installation CD

Please following the following steps:

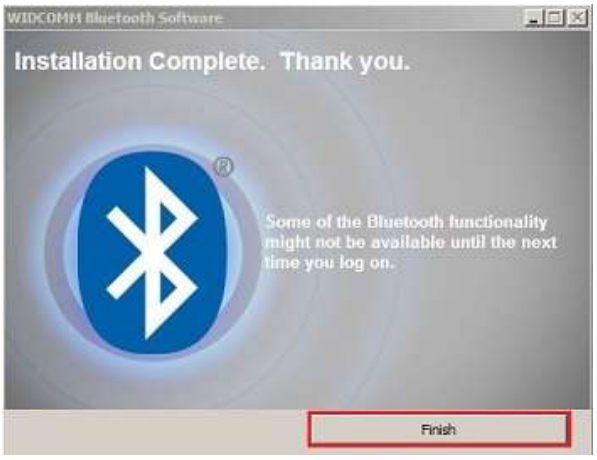
1. Insert the Bluetooth USB Module (part **H**) into your chosen terminal. This should have a free USB port on the front of the terminal and once the Module has been inserted it should not be vulnerable to being knocked.
2. Insert the Bluetooth Driver disc (part **I**) into the terminal. If the installation doesn't start automatically double click the 'Computer' icon on the desktop or (Windows key + E) and browse to the disc. Double click the "Belkin F8T065bf" option under Devices with Removable Storage and follow the installation instructions as follows

Click **Install**

Click **YES**

Click **Agree and Install Bluetooth Software** (this will then start to load the software. You will see a window saying "Installing device drive software". This can be ignored. May take several minutes)

Click **Finish,** then click on **Cancel** to the original box, and then CD can be removed



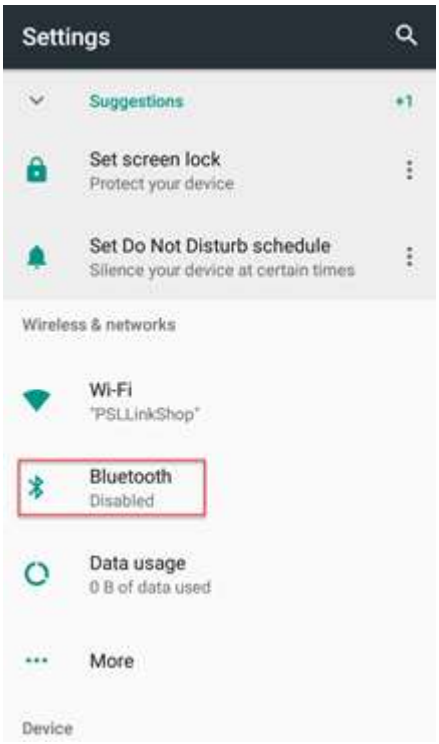
Connecting the HHT to the Bluetooth

Turn the unit (part **A**) on (button located top right) and **Swipe Up** to unlock.

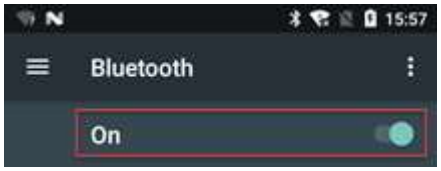
Swipe Up on the Home screen.

Click the **Settings** icon.

Click on the **Bluetooth** option.

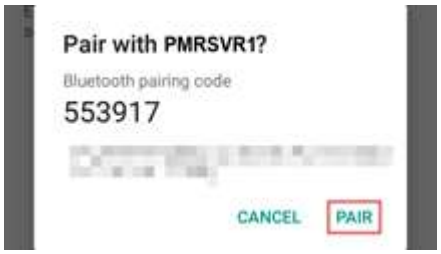


Slide the Bluetooth option **ON** and leave WLAN option **ON**.

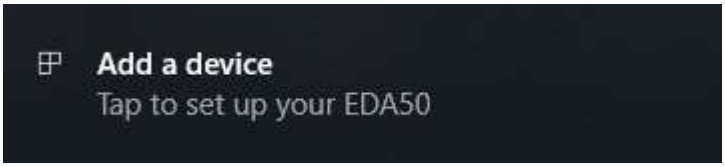


This will display the name of the Terminal that you are trying to pair the Bluetooth too. Press on the Device name (I.e. PMRSVR1, PC02, TILL1 etc.)

Press on the **Pair** option.

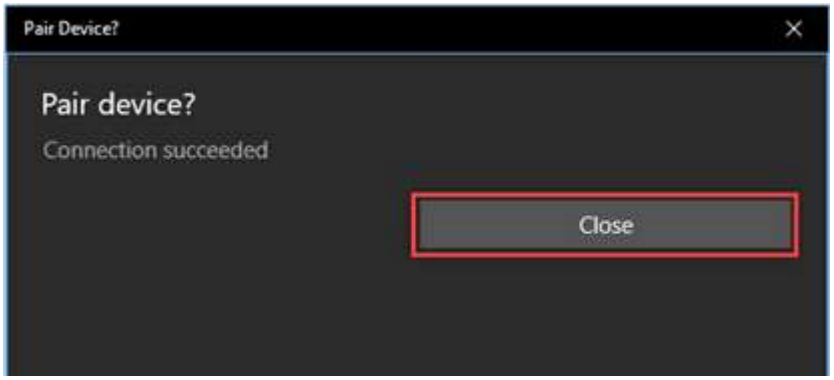


A bubble will appear bottom right hand corner of your terminal screen. Click in the middle of it.



Select the **Yes** option.

Click on the **Close** option.



The configuration continues until the media screen appears. Click the **Connect** button that refers to the Media option.

Pairing the ANDROID DEVICE to Analyst using Bluetooth

The Android device needs to be paired to Analyst on your chosen terminal which is running Hand-Held Terminal Server.

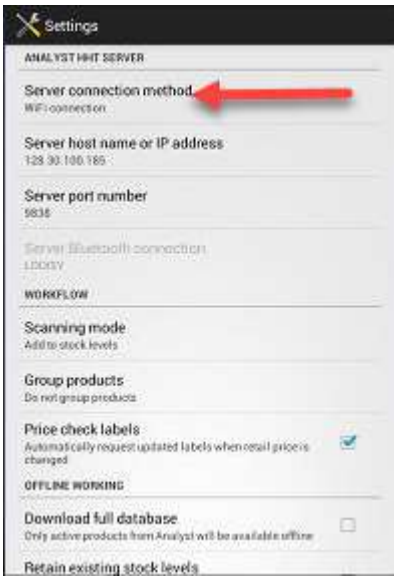
Turn the Android device unit (part **A**) on (button located top right) and **Swipe Up** to unlock.

Depending on which application needs setting up, this can be either one or both, select **Analyst Stock** (stock counting) or **Analyst POS** (token scanning).

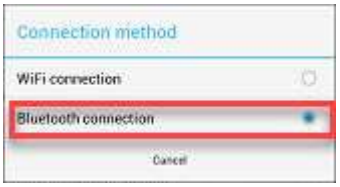
Click the **Menu** icon at the top right.

Click on the **Setting** option.

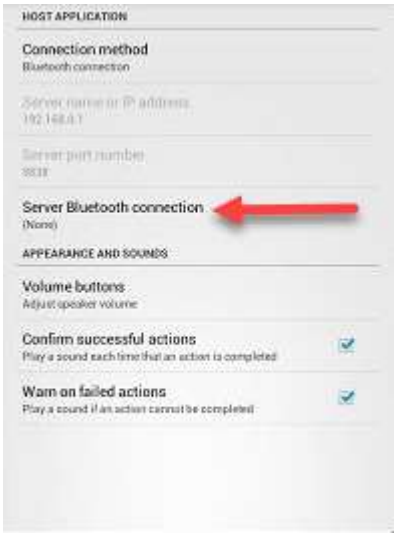
Click on the **(Server) Connection Method** option.



Select the **Bluetooth Connection** method.



Now select the **Server Bluetooth Connection** option.



Click on the name of the terminal i.e. (PMRSVR1, TILL1, etc.)

Press the **Back** Button. This then should complete the Pairing process.

Now following the **Test the Connection** instructions using the Analyst Android device Server application on **page 13**.

If you are still experiencing issues and can't see what is wrong, please call the Service Desk on 01257 235940 for further help and explain that you are setting up a HHT.