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This section describes the general layout and the elements of the eSIMS user interface.

**Structure of the User Interface**

The menu pages normally consist of the following elements:
1. Navigation bar
2. Selection menu
3. Search function
4. Results display
**Getting Around**

The navigation bar contains links that allow the user to navigate back to the previous screen in the workflow or to cancel an in-progress transaction and return to the main menu. The Back button takes the user to the previous screen, while the Home button/link will take the user back to the main menu.

The navigation bar also contains a Help link, which opens up the help and support window as well as a Search box that can be used to look up product information at anytime by keying in or scanning an item number, description or keyword.

**Note:** When navigating eSIMS Web, use the Back button on the webpage, rather than the back button on your internet browser.

---

**Navigation Bar Functions:**

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back</td>
<td>Navigates back to the previous screen in the workflow</td>
</tr>
<tr>
<td>Home</td>
<td>Navigates back to the main menu from any screen and cancels in progress transaction</td>
</tr>
<tr>
<td>Search</td>
<td>Input field to search for products</td>
</tr>
<tr>
<td>Log Out</td>
<td>Logs out current users and navigates to the log in screen</td>
</tr>
<tr>
<td>Help</td>
<td>Opens the online help option</td>
</tr>
<tr>
<td>Location</td>
<td>Displays inventory location and allows for navigation to other locations if applicable</td>
</tr>
</tbody>
</table>
The search function provides real time access to the Synthes item catalog. Searches will reveal pricing of items, locations, quantities in stock, pictures, etc. The catalog is customized according to the hospital’s requirements. Searches can be done by scanning an item, keying in an item number, or by searching descriptions. The search function can be accessed in virtually any screen within eSIMS providing quick access to specific product details.

**Search**

Searches can be initiated in two ways:

1. **Search Products/Orders**
   The Search Product/Orders button will take you to the search screen where more advanced searches can be done (shown in example below).

2. **Search box in the top navigation bar**
   The Search box is a shortcut that can be found in most screens that allows the user to easily scan or key in a number, or enter a description. If the item number or description entered is an exact match, the Product Details page will be displayed. Otherwise, the search results will be displayed in the Search Products/Orders screen.
Search continued

This section describes the steps taken to perform a product search.

1. Select the Search Products/Orders option from the main menu located under the Inventory group menu.
2. Select a search mode.
   Note: the Products search mode is selected by default.

Search mode options:

<table>
<thead>
<tr>
<th>Search Mode</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Products</td>
<td>Searches entire Synthes catalog</td>
</tr>
<tr>
<td>Inventory</td>
<td>Searches hospital inventory only—products that have a stock quantity</td>
</tr>
<tr>
<td>Items In</td>
<td>Searches items in transactions</td>
</tr>
<tr>
<td>Items Out</td>
<td>Searches items out transactions</td>
</tr>
<tr>
<td>Orders</td>
<td>Searches order transactions</td>
</tr>
<tr>
<td>OR Sets</td>
<td>Searches created OR Set instances (see Creating/Modifying OR Sets section for details)</td>
</tr>
</tbody>
</table>

3. Scan or key in the item number or description.
4. Click Search.
   a. If the search resulted in an exact match, the Product Details page would be displayed (see Step 5).
   b. If the search did not result in an exact match, the results are displayed in the Search Products/Orders screen.
5. Select the item by clicking the Product Number hyperlink to reveal the Product Details.
6. The details of a product can be edited for individual items by clicking the Edit Mode button.
7. Save the changes made by clicking the Save Changes button.
The following values are displayed in Product Details:

### Synthes Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Number</td>
<td>Manufacturer's product number</td>
</tr>
<tr>
<td>Product Description</td>
<td>Manufacturer's product name</td>
</tr>
<tr>
<td>Short Name</td>
<td>Abbreviation of the product description</td>
</tr>
<tr>
<td>Vendor</td>
<td>Division of Synthes</td>
</tr>
<tr>
<td>Package Size</td>
<td>Number of units per package (selling unit)</td>
</tr>
<tr>
<td>Unit</td>
<td>Unit of measure</td>
</tr>
<tr>
<td>Minimum Order Quantity</td>
<td>Minimum order quantity (in selling units)</td>
</tr>
<tr>
<td>Ordered Quantity</td>
<td>Quantity of item that is currently on order</td>
</tr>
<tr>
<td>Product Disabled</td>
<td>Is activated if item is obsolete and no longer available for order</td>
</tr>
<tr>
<td>New Product Number</td>
<td>If selected product is obsolete, the new product ID will be displayed</td>
</tr>
</tbody>
</table>

### Inventory Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Location of the backup inventory</td>
</tr>
<tr>
<td>Cabinet</td>
<td>Cabinet where item can be found</td>
</tr>
<tr>
<td>Drawer</td>
<td>Drawer where item can be found</td>
</tr>
<tr>
<td>Minimum Stock Quantity</td>
<td>The minimum stock/inventory PAR quantity, reorder point</td>
</tr>
<tr>
<td>Maximum Stock Quantity</td>
<td>The maximum stock/inventory PAR quantity</td>
</tr>
<tr>
<td>Total Quantity On Hand</td>
<td>Quantity of item in stock/inventory</td>
</tr>
</tbody>
</table>

### Hospital Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal Reference No.</td>
<td>Hospital ERP/Materials Management item number</td>
</tr>
<tr>
<td>Price</td>
<td>Price of the product (per selling unit)</td>
</tr>
<tr>
<td>LOT Tracking</td>
<td>Item LOT number tracking</td>
</tr>
<tr>
<td>Expiration Tracking</td>
<td>Item expiration date tracking</td>
</tr>
<tr>
<td>Qualified Product List</td>
<td>Item is authorized for reorder</td>
</tr>
<tr>
<td>First Expiration Date</td>
<td>Earliest expiration date of item in stock/inventory</td>
</tr>
<tr>
<td>Label 1</td>
<td>Hospital specific value</td>
</tr>
<tr>
<td>Label 2</td>
<td>Hospital specific value</td>
</tr>
<tr>
<td>Label 3</td>
<td>Hospital specific value</td>
</tr>
<tr>
<td>Quantity</td>
<td>Quantity discount tier</td>
</tr>
<tr>
<td>Price</td>
<td>Price at quantity discount</td>
</tr>
<tr>
<td>Currency</td>
<td>Currency for stated price</td>
</tr>
</tbody>
</table>
Cycle Count provides the means to add locations to product and capture backup inventory of all items in stock. Cycle Count can be used to do the initial setup and loading of inventory as well as periodic inventory audits. In order to perform a cycle count, locations, cabinets and drawers must be established before counting inventory and/or recording locations. See the section titled Adding/Modifying Locations under Administrative Functions for location creation instructions.

**Note:** Performing a Cycle Count will overwrite any previously stored values with the new data captured in the Cycle Count.

**Recording Locations and Stock Quantities**

This section describes the steps taken to record locations and on-hand quantities of all products in inventory.

1. Select the Cycle Count of Inventory option from the main menu located under the Inventory group menu.
2. Select the Cabinet from the drop-down menu.
3. Select the Drawer from the drop-down menu.
4. Scan or key in your items in the drawer.
   a. Disable Warnings — Checking this box will disable all product replacement and obsolete product warnings while scanning or keying in product information.
   b. To change quantities before scanning the item, change the quantity of the item in the Actual Inventory field then scan the item.
      **Tip:** Quantities can be changed by entering the quantity in the Product Number field and then hitting the asterisk key on the keyboard (“*” or Shift + 8). The quantity will be moved to the Actual Inventory field, while the cursor will return to the Product Number field.
5. Click the Save Changes button to save.
Maintain Stock functions much like the Cycle Count, with the addition of PAR values (or min/max values) in conjunction with location and on-hand count recording. Maintain Stock should be used for the initial setup and loading of inventory. To utilize the Maintain Stock function, locations, cabinets and drawers must be established before counting inventory and/or recording locations. See the section titled Adding/Modifying Locations under Administrative Functions for location creation instructions.

**Recording Locations, PAR values, and Stock Quantities**

This section describes the steps taken to record locations, PAR values, and on-hand quantities of all products in inventory.

1. Select the Maintain Inventory option from the main menu located under the Inventory group menu.
2. Check off either, or both aspects (location, PAR) which you would like to record as you count inventory.
3. Select the desired values from the drop-down boxes.
   a. Or, key them in for Min and Max values.
4. To set those desired values prior to scanning inventory, click Use Selection.
5. Scan or key in product ID's into the Product Number field.
   a. Click Apply, or hit enter, to add the product to the list.
6. When finished, click Save.
Items Out is used to decrease inventory and record usage only. Items out can be completed on a case-by-case (surgical episode) basis or in a batch process daily.

**Note:** Recording Items Out captures usage only. The products are not ordered automatically, but you can easily transition from Items Out to an Order.

**Scanning Items Out**
This section describes the steps taken to record usage and track inventory depletion.

1. Select the Items Out option from the main menu located under the Inventory group menu.
2. Scan or key in any used Synthes items in the Product Number field.

   **Note:** The top barcode on the Synthes product package or the barcode on the Synthes product dividers within the SIMS cabinets can be used. The bottom barcode on the Synthes item package cannot be used as an item number; it will result in an error if scanned.

3. A checkout comment may be entered in the Comment field if applicable.

4. Click Save to complete the transaction.
   
a. Alternatively, an order can be generated by clicking the Reorder button. Screen 2 of 3 of the order process will be displayed (see Step 6 of the section titled Ordering Inventory).
**Changing Quantities**

This section describes the steps taken to modify quantities of items before or after they have been scanned/keyed into a transaction.

**Note:** This section can be applied to all transactional functions within eSIMS.

1. To change the quantity of a previously entered item, select and highlight the item.
2. Change the Quantity Out to the desired quantity.
   a. Alternatively, the up/down arrows or the calculator can be used to change quantities.
3. Hit the Enter key or click the Apply button.
Deleting an Item
This section describes the steps taken to delete items from a transaction before saving.

Note: This section can be applied to all transactional functions where product is scanned in, out or ordered within eSimS.

1. To remove a product, select and highlight the item.
2. Click the Remove button to delete the item from the transaction.
Items In is used to record replenishment or add stock to inventory from orders. There are two Items In options that can be used when receiving items into inventory.
- Order-based: Receiving inventory against an open order.
- Without Order: Receiving inventory without a purchase order or requisition (blind).

**Items In—Order-based**
This section describes the steps taken to record new inventory in against an open/outstanding purchase order.

1. Select the Items In option from the main menu located under the Inventory group menu.
2. Click the Search button to view all open orders.
   **Note:** Order-based Items In Mode is selected by default.
3. Select and highlight the open order to receive in by clicking anywhere on the record.
   **Note:** Clicking the order number hyperlink will display the order header history page for that open order.
4. Click Use Order to continue.
Items In—Order-based continued

5. Click the Order Complete button if all items in the open order were received.
   a. If an item is on backorder click and highlight the item(s) that was not received.
   b. Change the quantity to the actual received quantity and hit the Enter key or click Apply.
      If the item was on backorder and a quantity of 0 was received, enter a “0” in the Quantity In field.

6. Click the Save button to complete the transaction.

   Note: The Order Complete button can be bypassed and the user can scan in all received items which will progressively increase the Quantity field for each item.
**Items In—Without Order**
This section describes the steps taken to record new inventory blindly (without associating the items to an open order).

1. Select the Items In option from the main menu located under the Inventory group menu.

2. Click the Without Order Items In Mode.
Items In—Without Order continued

3. Scan or key in any received Synthes items in the Product Number field.

**Note:** The top barcode on the Synthes product package or the barcode on the Synthes product dividers within the SIMS cabinets can be used. The bottom barcode on the Synthes item package cannot be used as an item number; it will result in an error if scanned.

4. Click Save to complete the transaction.
**Items In — Auto Post**
This section describes the steps taken to record new inventory into your cabinetry without associating the items received to a specific open order. This function is different from “Items In Without Order” by receiving lines from any open order in queue. “Without Order” will receive items in without referencing any items in the open order queue.

1. Select the Items In option from the main menu located under the Inventory group menu.
Items In—Auto Post continued

2. Click the Auto Post Items In Mode.

3. Scan or key in any received Synthes items in the Product Number field.
   **Note:** The top barcode on the Synthes product package or the barcode on the Synthes product dividers within the SIMS cabinets can be used. The bottom barcode on the Synthes item package will result in an error if scanned.

4. Click Save to complete the transaction
eSIMS offers a number of ways to create orders. Orders can be generated using one of the following methods:
- Blank Order method: Create orders manually.
- Items Out method: Order based on saved items out transactions. See the section titled Items Out.
- Min Threshold method: PAR based ordering. Requires PAR levels to be loaded for each item in inventory.

**Blank Order**
This section describes the steps taken to create and save a blank or manual order.

1. Select the Order Products option from the main menu located under the Inventory group menu.
Blank Order continued

2. Select the Blank Order search mode option.
   **Note:** If Blank is the only order option used, Step 2 will be
   bypassed and the order entry screen will be displayed.
3. Add items to the order by scanning the product barcode or keying in the item number.

4. To change the quantity (defaults to 1) before the item is keyed in or scanned:
   a. Key in the desired quantity in the Order Quantity field and hit the Enter key.
   b. Use the up/down arrows to change the quantity and hit the Enter key.
   c. Click the Calculator button, key in the quantity and click Ok.

5. Click the Continue button to proceed to Step 3 of the order.
Blank Order continued

6. Select the Order Scenario option (Print/Fax will be selected by default).
   
   **Note:** To send the order directly to Synthes, select the order scenario Online. Shipping Method can be selected if ordering online.
   a. A PO number can be added in the PO Number field if applicable.
   b. A copy of the order can be printed by clicking the Print Order link if desired.
   
   **Note:** If the Print/Fax order scenario is selected, the order will automatically open in a print preview which can be printed.

7. Click the Send button to save and complete the order.
**Items Out**

This section describes the steps taken to create and save an order based on Items Out transactions (consumption/usage).

**Note:** This method of ordering uses Items Out transactions to create the order. Saved Items Out transactions must be available in order to use this ordering method.

1. Select the Order Products option from the main menu located under the Inventory group menu.
2. Select the Items Out search mode option.
3. Click the Search button.
4. Select the Items Out transaction or transactions you wish to reorder by placing a check in the Select checkbox.
   a. **Note:** By default the Since last order check box is selected. Therefore, only those Items Out transactions that were completed since the last order was saved are displayed. To see all Items Out transactions ever completed, uncheck the Since last order checkbox and click Search.
5. Click the Use Selection button to continue to Step 2 of the order.
6. Additional items can be added to the order by keying in or scanning a new item number in the Product Number field.
7. Click the Continue button to proceed to Step 3 of the order.
8. Select the Order Scenario option (Print/Fax will be selected by default).
   **Note:** To send the order directly to Synthes, select the order scenario Online. Shipping Method can be selected if ordering online.
   a. A PO number can be added in the PO Number field if applicable.
   b. A copy of the order can be printed by clicking the Print Order link if desired.
      **Note:** If the Print/Fax order scenario is selected, the order will automatically open in a print preview which can be printed.

9. Click the Send button to save and complete the order.
Minimum Threshold
This section describes the steps taken to create and save a PAR based order. This ordering method queries the database and looks for all items that have fallen below the established PAR or minimum reorder point.

Note: PAR or minimum and maximum inventory thresholds must be established for all products the hospital wishes to reorder.

1. Select the Order Products option from the main menu located under the Inventory group menu.
2. Select the Minimum Threshold search mode option.
   a. All items below PAR will be displayed and selected by default. If all items are at or above their established PAR levels, the order grid will be empty, meaning there are no items to order (everything is at PAR).
   b. To remove items from the order, uncheck the Select checkbox next to each item.
3. Click the Use Selection button.
Minimum Threshold continued

4. Additional items can be added to the order by keying in or scanning a new number in the Product Number field.
5. Click the Continue button to proceed to Step 3 of the order.

6. Select the Order Scenario: Print/Fax (will be selected by default).
   **Note:** To send the order directly to Synthes, select the Online order scenario. Shipping Method can be selected if ordering online.
   a. A PO number can be added in the PO Number field if applicable.
   b. A copy of the order can be printed by clicking the Print Order link if desired.
   **Note:** If the Print/Fax order scenario is selected, the order will automatically open in a print preview which can be printed.

7. Click the Send button to save and complete the order.
eSIMS Web offers the ability to create a virtual inventory of any set that a hospital may have in stock. Creating set lists allow a hospital to view their set inventory at any given moment, perform inventory searches within sets, and print out or view count sheets to aid in the replenishment of a set. Instances must be created to view, search and run set inventory reports. Instances are created based on Synthes set templates that are preloaded or created by the hospital. Templates, Synthes-based or hospital-based, are used to create custom instances of each individual set in the hospital.

**Note:** It is recommended that Synthes templates are used to create instances. By default, hospital-based templates do not exist in eSIMS.

**Creating Set Instances**
This section describes the steps taken to create and save individual, custom set instances.

1. Select the Use OR Set Templates option from the main menu located under the OR Sets group menu.
Creating Set Instances continued

2. Select Synthes-based as the Template Type.

   **Note:** By default, the Hospital-based template type will be empty. A hospital can create custom templates from Synthes-based templates.
3. Enter any of the following in the Search Settings field to search for set templates:
   – Product number
   – Product description
   – Set number
   – Set description

4. Click the Search button to perform the search.
   **Note:** An exact match will filter the search results to display only one result.

5. Select and highlight the filtered set by clicking anywhere on the record.

6. Click the Use Template button to begin customizing the set instance.
   **Note:** The Copy Template button will allow you to create a Hospital-based template, not a Set Instance. Creating Hospital-based templates is not recommended. Set Instances are needed for reporting and inventory evaluation.
Creating Set Instances continued

7. Add or modify the following fields; all are optional:
   – Name—Name used to identify the set
   – Description—Descriptive information about the set
   – Location—Home location of the set
   – Barcode—If the set has a barcode affixed it can be used to pull up the set contents during a search.

8. Additional product can be added to the set by keying in or scanning the product(s) in the Product Number field.

9. Click the Save button at the bottom of the page to save the OR Set Instance.
Modifying Set Contents
This section describes the steps taken to create and save individual, custom instances.

1. Highlight the item record by clicking anywhere on the item.
2. To change the quantity of an item, do any one of the following:
   – Key in the desired quantity in the Quantity field and hit the Enter key
   – Use the up / down arrows to change the quantity and hit the Enter key
   – Click the Calculator button, key in the quantity and click Ok.
3. Click the Apply button or hit the Enter key.
4. To remove an item, select the item record and click Remove.
eSIMS comes preloaded with a number of standard reports that can be viewed, printed and exported electronically. Reports can be run from within the Reports function as well as within each transactional function.

**View/Print Reports**
This section describes the steps taken to view and print reports found in the Reports menu option.

*Note:* Within each function (Items In, Items Out, Order, Cycle Count, OR Sets), a report can be printed by clicking the Print link.

1. Select the View Reports option from the main menu located under the Reports group menu.
2. Open the report by clicking the Open hyperlink next to the report.
   a. **Note:** For custom requested reports, select the Custom Reports group.

3. Select filter options if applicable.
   **Note:** If left blank, data from all locations will be displayed in reports. Filters will not be available when in transactional functions like Items In and Order Products.
4. Click OK to continue.
View/Print Reports continued

5. To print the report, click the Print icon.  
   **Note:** The report must print to a PDF file before it can 
   physically be printed. Adobe Acrobat Reader 6.0 or higher 
   must be installed.

6. Click Export in the Print to PDF dialog box then print 
   within Adobe Acrobat Reader or compatible software 
   viewer.
### List of Standard Reports

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Backordered Items</td>
<td>Lists all items that are on backorder</td>
</tr>
<tr>
<td>Customer OR Set Templates</td>
<td>Displays custom OR set templates created by hospital</td>
</tr>
<tr>
<td>Dashboard</td>
<td>Gives a detailed overview of a location. Contains information about the inventory levels, overstock, understock, etc.</td>
</tr>
<tr>
<td>Fast Movers</td>
<td>Lists items that are moving out of inventory frequently, average usage by item, average order quantity and average shelf time.</td>
</tr>
<tr>
<td>Inventory On Hand</td>
<td>Inventory on hand by location</td>
</tr>
<tr>
<td>Inventory Reorder</td>
<td>Inventory below PAR level</td>
</tr>
<tr>
<td>Item Transaction Audit</td>
<td>Detail of a selected item and all transactions in history</td>
</tr>
<tr>
<td>Item Usage</td>
<td>Lists items in inventory, usage, and estimated stock out date</td>
</tr>
<tr>
<td>Items with Expiration Date</td>
<td>Lists all items with a recorded expiration date</td>
</tr>
<tr>
<td>Items with LOT</td>
<td>Lists all items with a recorded LOT number</td>
</tr>
<tr>
<td>Loaned Inventory Products</td>
<td>Lists all consignment items in inventory</td>
</tr>
<tr>
<td>On Hand Value by Cabinet</td>
<td>Inventory on hand by cabinet</td>
</tr>
<tr>
<td>On Hand Value by Drawer</td>
<td>Inventory on hand by drawer</td>
</tr>
<tr>
<td>Open Orders</td>
<td>Lists all open orders and items within order</td>
</tr>
<tr>
<td>OR Sets</td>
<td>Lists all set instances and contents of the sets</td>
</tr>
<tr>
<td>Overstock Report</td>
<td>Lists all items with an on hand quantity greater than the PAR level</td>
</tr>
<tr>
<td>Qualified Product List</td>
<td>Lists all items in the catalog that are flagged as authorized to order</td>
</tr>
<tr>
<td>Slow Movers</td>
<td>Lists items that are moving out of inventory infrequently, average usage by item, average order quantity and average shelf time.</td>
</tr>
<tr>
<td>Synthes OR Set Templates</td>
<td>Lists all preloaded Synthes set templates and contents of the sets</td>
</tr>
<tr>
<td>Transaction Reprint</td>
<td>Displays historical transactions and contents of the transaction</td>
</tr>
<tr>
<td>Understock Report</td>
<td>Lists all items with an on hand quantity below the PAR level</td>
</tr>
</tbody>
</table>
**Exporting Reports**

This section describes the steps taken to export reports.

1. In the report view, click the Export icon to export the report.
2. Select the File Format and click Export.

Export formats include:

- Crystal Reports
- PDF
- Microsoft Word (97–2003)
- Microsoft Word (97–2003) Editable
- Microsoft Excel (97–2003)
- Microsoft Excel (97–2003) Data Only
- Rich Text Format (RTF)
- XML
eSIMS is a location-based inventory management tool. Locations, cabinets, and drawers must be created in order to manage inventory. All products in inventory can be assigned to a created location (see the section titled Cycle Count).

**Adding/Modifying Locations**
This section describes the steps taken to create and modify inventory locations.

1. Select the Locations option from the main menu located under the Administration group menu.
Adding/Modifying Locations continued

2. To add a location, click the Add button.
3. Enter the location Name and the Address (optional).
4. Click Save Changes.
5. To modify an existing location, select the location by clicking the record under Storage Locations, change the Name and/or Address and click the Apply button.
6. To delete a location, select the location by clicking the record under Storage Locations and click the Remove Location button.
Adding Cabinets and Drawers
This section describes the steps taken to create cabinets and drawers within a created location.

1. Select the Locations option from the main menu located under the Administration group menu.

2. Select the Location by clicking the location under Storage Locations.
3. Click the Add Location button.
4. Enter the Cabinet Name.
5. Click Save Changes.

**Note:** To add a Drawer, select the cabinet and repeat Steps 3 and 4.
**Adding and Modifying Users**

This section describes the steps taken to create and modify users and their permissions.

1. Select the User Management option from the main menu located under the Administration group menu.

2. Select Add User to add a new user.

3. Fill out credentials
   a. First Name
   b. Last Name
   c. Login Name (User ID)
   d. Storage Location (select from drop-down menu)
   e. Password (type twice to confirm)
User Permissions
This section describes the user permissions available in eSIMS Web.

Login/Use eSIMS Web Client
Allows user to log in and out of eSIMS Web. This should always be checked off for all users.

Create Items In transactions
Allows user to record items coming into inventory.

Create Items Out transactions
Allows user to record items coming out of inventory.

Maintain inventory data (Cycle Count)
Grants user access to the Cycle Count functionality.

Search for products
Allows user to use the Search functions to find product details.

Search for orders
Allows user to use the Search functions to find order details. This should only be checked off if eSIMS Web is used for ordering purposes.

Maintain inventory data (Edit Product Details)
Grants user permissions to modify inventory details including min/max values, internal numbers, locations, etc.

Create order transactions
Allows user to place orders via eSIMS Web. This box should only be checked if the facility is utilizing eSIMS Web for ordering purposes.

Close orders/change status
Allows user to close orders in eSIMS. This box should only be checked if the facility is utilizing eSIMS Web for ordering purposes.

Purge history data from the database
Allows user to clear historical data from eSIMS.

Update order status
Typically, order status is updated automatically. However, if that option is not enabled, checking this box will allow the user to prompt and initialize a status update to ordering history.

Update product catalog
The product catalog is typically updated automatically. However, if that option is not enabled, checking this box will allow the user to prompt and initialize an update to the product catalog.
User Permissions continued

**Generate and display reports (Basic Reports)**
Allows user to view basic reports.

**Generate and display reports (Advanced Reports)**
Allows user to view advanced reports.

**Change configuration of eSIMS**
Allows user to change the configuration of eSIMS. This gives the user full access to all the administrative functions, including but not limited to: adding and modifying users, adding and modifying locations, and advanced system configuration settings such as proxy and server information.

**Create users and add permissions**
Allows user to create and modify users and their permissions.

**Download and install software updates**
Software updates are typically updated automatically. However, if that option is not enabled, checking this box will grant the user permission to prompt and initialize all updates to the eSIMS software.

**Configure OR sets**
Allows user to modify and save the instances and contents of Synthes sets.

**Use OR set templates**
Allows user to use standard Synthes sets as templates to create custom OR set instances.

**Maintain OR set data (Cycle Count)**
Allows user to access the Cycle Count functionality within OR set instances. This feature functions the same as the Product/Inventory Cycle Count, but within Synthes sets rather than individual product IDs.

**Switch current location**
Allows user to switch to another physical location to record data from a second (or third, etc.) set of inventory. This feature should only be incorporated when multiple facilities are being managed from one log-in to eSIMS Web.

**Maintain stock and locations**
Allows user to access the Maintain Stock functionality.