



Web-based Rules Sharing Application

User's Guide



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Chapter 1

Quick Tours

Guest Privileges:

If you receive the notification illustrated below, either you have logged in as a 'guest' or your login does not have the appropriate access rights.



Guest mode will only allow the user to filter and view the rule example descriptions and not the rule example details.

Requirements to Gain Full Access:

- Licensed user of Instrument Manager™ with Specimen Management or Specimen Manager (rules only) package.

Process to Gain Full Access:

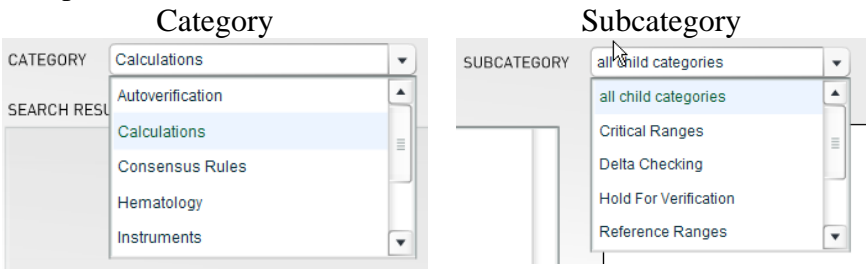
Acquired System From...	Process
Data Innovations directly	Provide our service department with your license number and contact information to request a login with full access.
A Business Partner of Data Innovations or 3 rd -Party vendor	Contact the business partner or 3 rd -party vendor for instructions on requesting a login with full access.

Quick Tour: View Rule Example(s)

Objective:

Guide a user to selecting and viewing rule examples with detail.

Steps:

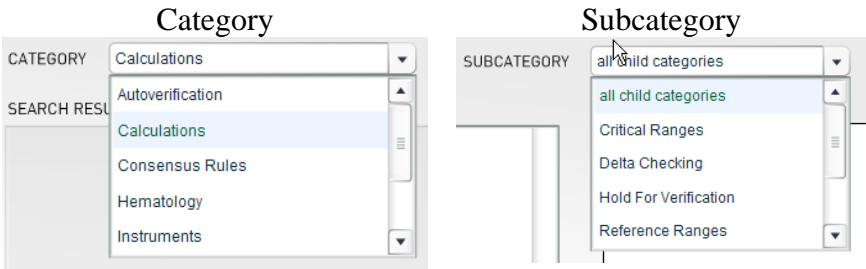
Step	Action
1	<p>From the <i>Rules Library</i> main screen, use the <i>CATEGORY</i> and <i>SUBCATEGORY</i> drop-down menus to filter the rules examples to find a rule.</p> <p><u>Example:</u></p> 
2	<p>Select the rule and click the <i>Add to Report</i> button.</p> <p><u>Resulting Action:</u> The rule will appear in the <i>REPORT</i> menu.</p>
3	<p>Repeat Steps 1 and 2 for additional rules.</p>
4	<p>Select the <i>View Rules</i> button underneath the <i>REPORT</i> window.</p> <p><u>Note:</u> If the <i>View Rules</i> button is not available ('grayed out'), see <i>Guest Privileges</i> section in Chapter 2.</p>
5	<p>The <i>Rules Preview</i> screen will appear with the details for each rule example placed in the report in Step 2.</p> <p><u>Hint:</u> Use the vertical scroll bars in the Rules Preview window to see the details for all the rules examples in the report.</p>
6	<p>To print the report, select the <i>Print Rules</i> button at the lower left-hand side of the <i>Rules Preview</i> screen or,</p> <p>To return to the <i>Rules Library</i> main screen, select the <i>Cancel</i> at the lower right-hand side of the <i>Rules Preview</i> screen.</p>

Quick Tour: Print Rule Example(s)

Objective:

Guide a user to selecting and printing rules examples with detail.

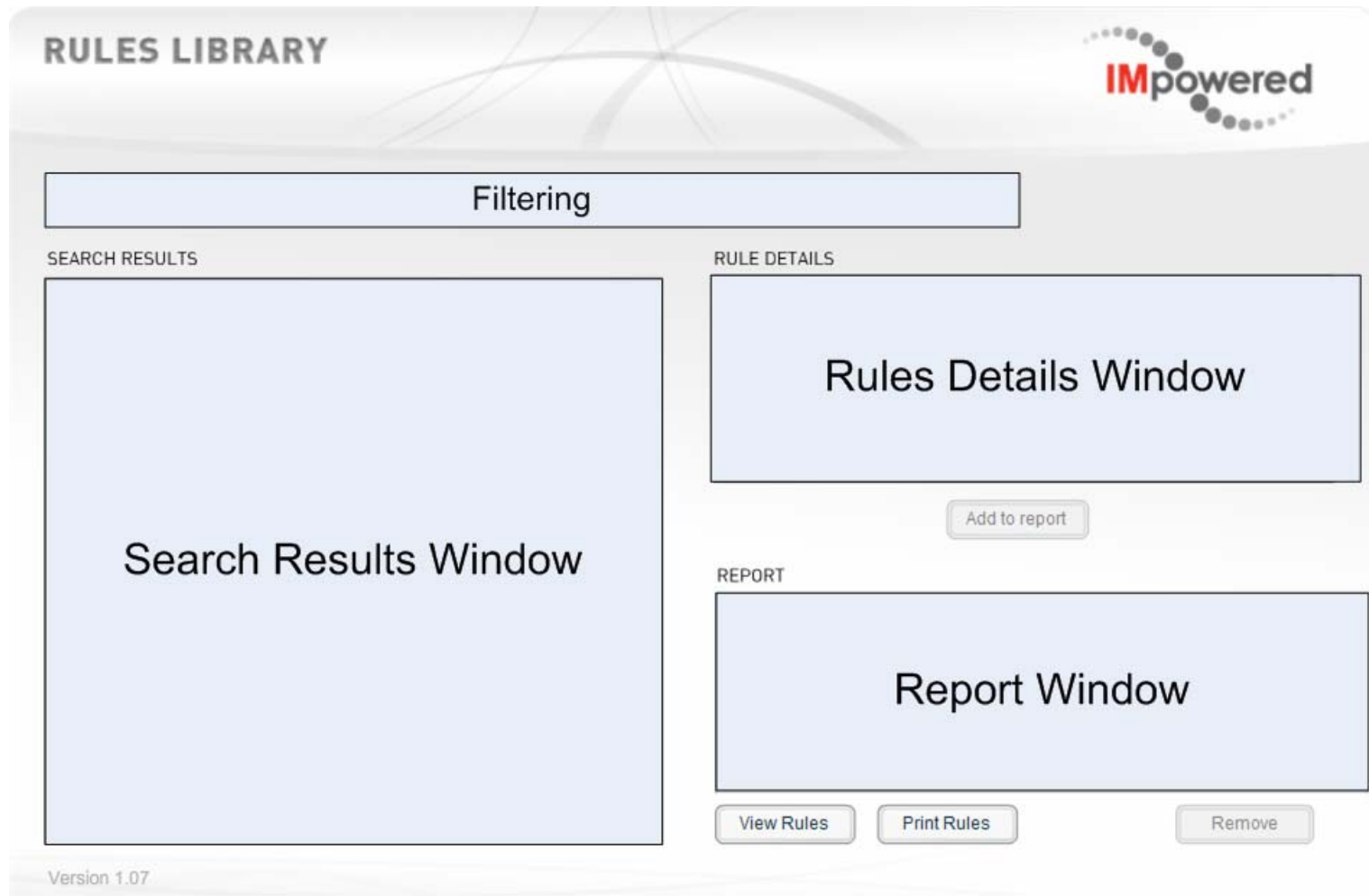
Steps:

Step	Action
1	<p>From the <i>Rules Library</i> main screen, use the <i>CATEGORY</i> and <i>SUBCATEGORY</i> drop-down menus to filter the rules examples to find a rule.</p> <p><u>Example:</u></p> 
2	<p>Select the rule and click the <i>Add to Report</i> button.</p> <p><u>Resulting Action:</u> The rule will appear in the <i>REPORT</i> menu.</p>
3	<p>Repeat Steps 1 and 2 for additional rules.</p>
4	<p>Select the <i>Print Rules</i> button underneath the <i>REPORT</i> window.</p> <p><u>Resulting Action:</u> The web browser will provide a list of printers to print the report to.</p> <p><u>Note:</u> If the <i>Print Rules</i> button is not available ('grayed out'), see <i>Guest Privileges</i> section in Chapter 2.</p>

Chapter 2

General Information

Overview: Rules Library (Main Screen)



Filtering:

Use the *Category* and *Subcategory* pull-down menus to filter the rules presented in the *Search Results* window. The *Categories* filter defines the broad categories to filter the rules. The *Subcategories* filter further refines the criteria for rules based on the *Categories* selection.

When the *Subcategory* filter is set to '*all child categories*' it will display all the rules available for the *Categories* filter selection.

Rule Example(s):

RULE [IF] and RULE [THEN]

If the user needs to substitute a variable in the rule (e.g. test code) the variable will be denoted in UPPERCASE and enclosed with brackets and quotation marks.

If the rule example is part of a series of rules to accomplish a task, the name should denote the dependency and the number in the series.

Example: Perform Special Task (1 of 3)

Message Type

Defines the message type of the rule example. The options can be Result, Request and/or Specimen Management.

Dependent Rules

Defines any other rules that need to be used in conjunction with this rule to gain the functionality defined by the rule example.

Dependent Conditions

Defines any conditions that need to occur or be present in order for this rule to work correctly.

Minimum Software Version:

Defines the minimum software revision of Instrument Manager™ required to use the rule example. The lowest version tested with the rule examples are v8.06 of Instrument Manager™.

Note: Direct Data Innovations customers with a service contract are entitled free upgrades to the most current version of Instrument Manager™.