

DrugPak 6.0 Users Manual

by Scanlon Associates

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Part (

1 DrugPak Main Module

1.1 Main Screen

1.1.1 Status Bar

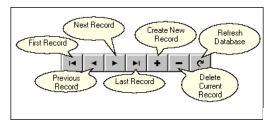
The status bar is usually located at the bottom of the main DrugPak window, although its position and visibility can be controlled in Preferences > User Preferences > Main Module > General Options Main Page Layout. The status bar has several sections, each of which displays useful information.



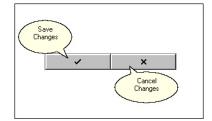
- The first section displays the "mode" of the current data set (edit, browse, or insert)
- The second section (when double-clicked) will open a new window displaying the number of records in the currently displayed window. This value is affected by filters which may be active in the current window.
- The third section displays the current User
- The last section displays the current company. Double-click this area to display the Find Company window to select a new current company.

1.1.2 Navigator Bar

The navigator bar is a convenient way to browse and modify data. It is marked with familiar symbols that are easy to recognize. Depending on the state of the dataset (browse mode or edit mode), the appropriate navigator bar will be displayed. The first, previous, next or last record is dependent on the sort order (e.g., if you are viewing the participants window, and the sort order is set to Alphabetic, then the first record button will take you to the first record, alphabetically).



Navigator Bar in Browse Mode



Navigator Bar in Edit Mode

1.1.3 Database Control Panel

The database control panel contains controls which you use to navigate through records. It is typically located at the top of a window (results, participants, etc.) but its position can be changed via Preferences > User Preferences > Main Module > General Options > Navigator at Top check box. The database control panel contains a navigator bar, a sort order list, and additional controls which help you explore the active database.



Navigator Bar

The navigator bar uses the familiar VCR controls to allow you to scroll through records.

Sort Order list box

Use the Sort Order list box to control the sequence in which records are displayed in the active dataset. Click the drop-down list to see the available sort orders. The Quick Find window will obey the current sort order.



Quick Find button

The Quick Find button will allow you to do a quick search by just entering the first few characters of the item that you are searching for. A sort order other than Natural Order must be selected in order to use the Quick Find feature.

Find button

Click this button to display the standard Find Window for the active window (participants, results, companies, etc.)

1.1.4 **Quick Find Window**

The quick find window is a easy way of locating records instead of using the standard Find Window. It searches for the closest match to the search term that you entered - it does not display a list of records as the find window does.

- Display the quick find window by pressing Ctrl-Q on any data screen (results, participants, home bases, etc.), by selecting Quick Find from the Find menu, or by clicking the binoculars button on the Toolbar
- The quick find window uses the current sort order to provide a search field. As you type values in the search field, DrugPak will look for the closest match.

Selecting a Sort Order

Use of the guick find window requires that a sort order other than "Natural Order" be chosen. For example, if you typically search for participants by their last name, set the participant window's sort order to alphabetic. When you use the guick find window to find a participant, as you start to enter the participant's last name, DrugPak will automatically start to search for participants based on their last name.

1.1.5 Tool bar

The Toolbar on the main screen offers quick access to popular functions.

- By default, the toolbar is located along the left side of the main screen (it can be moved to the top by checking the Preferences > User Preferences Main Module > General Options > Main Page Layout > ToolBar at Top box).
- Position your mouse pointer over any of the buttons and the functions name will appear

Change Current Company

Click this button to display the Find Company window.

KShow All This Participant's Results

Click this button to automatically create a filter on the Results page to isolate the currently displayed participant. This button will be available only when the Participants page and/or the Results page is displayed, and either one appears in front of other open windows.

RGlobal Participant Search

Click this button to find a participant in any company.

- This feature can also be accessed via the Find menu
- If you know that the desired participant record is located in the active company, it may be faster to use the Find feature on the participants page

RGlobal Specimen Search

Click this button to search for a result/specimen. If the result that you are looking for is attached to a participant in the active company, it may be faster to use the Find feature on the results page.

PAdd Result for Participant

When the participants page is open, and positioned in *front* of other windows, you can quickly add a result for the current participant using this feature.

□ Print Result Letter

When the results page is open, and positioned in *front* of other windows, you can quickly print a result letter for the active result using this feature. Result letters can also be printed by selecting Reports > Results > Result Letters.

Random Selection Expert

Click this button to display the Random Selection Expert window.

View Images Associated with this Record (available only for users of Document Manager)
Click this button to display any documents that have been linked to the current record.

Task List (available only for users of Informer)

Click this button to display the list of generated tasks.

? Help

Click this button to display the help topic for the main screen.

Exit DrugPak

Click this button to exit DrugPak.

1.2 Results

The results window will display test records (if any) for all participants in the active company. You can navigate through the test records using the navigator bar or search for a particular test record using the find button. The results page will not be visible if the current DrugPak user does not have access to results (this permission is assigned by the MASTER user in the User File).

Drug and Alcohol results are stored in separate records, and the appearance of the screen changes slightly depending on which type of result record is displayed. Each participant may have up to two result records for a given batch: one for drugs and one for alcohol.

Participant

This field is used to identify the participant to whom this result record is linked. To enter a participant name, right-click on the participant field, press the F2 key to select the correct participant via the Find Participant window, choose a participant from the drop-down menu, or press the > button and choose 'Show "Find Participants" Window.' (When entering a result from this window, the participant must already exist in DrugPak) Once a participant has been chosen, you may double-click on the Participant label or choose Edit Participant from the > menu to jump to the corresponding record on the Participants page.

After you choose the participant for a new result record, certain fields may be automatically populated:

- Home base, occupation, DOT status, DOT administration, observation requirements values will be pulled from the participant's record (if assigned)
- Laboratory and collection site DrugPak will look for a default laboratory and default collection sites in the following order: participant's home base* > participant's company** > global setting***
- * Home base > Result Defaults tab
- ** Company > Participant/Result Options
- *** Preferences > Global Settings > Main Module > Result Options > Default Values for New Results

Test Class

This field is used to classify the result as a drug test result or an alcohol test result. Two results may have the same participant ID and batch ID, as long as one is a drug test result and one is an alcohol test result. Drug and alcohol results are kept separate as a reporting convenience. Furthermore, alcohol tests are rarely taken from the same specimen as a related drug test, and often require separate collection information. This field is available only when adding a new result record.

Sample Type

Select the appropriate sample type: blood, breath, hair, instant, saliva, or urine.

Batch ID

- Along with the Participant ID, it is an important value to identify a test result.
- This value cannot be modified after the test result is saved.
- Random selection batch numbers (for randoms generated by DrugPak) always begin with the letter R.
- Each participant can have no more than one drug test result and one alcohol test result with any one batch ID.
- The batch ID for non-RND tests will be automatically filled with an ID created from today's date (e.g., 20070321 for March 21, 2007). To disable the auto-complete of the batch ID, uncheck this box: Preferences > Global Settings > Main Module > Result Options > Auto-generate batch ID
- If manually entered, the batch ID field will allow up to eight alphanumeric characters

DOT

This box indicates whether the participant was subject to DOT reporting at the time of the test. If a DOT administration has been assigned to a participant, this box will be checked when creating a new result for that participant. Changing the DOT status of the test result will not affect the DOT status of the participant record.

Specimen ID

Enter the identification number provided by the collection site used to identify the specimen. Typically this number is available on the "Chain of Custody" (COC) or "Custody and Control Form (CCF)."

Test Type

This code indicates the test type category under which the current result record is classified. Press F2 or right-click on this field to bring up the Find Test Type window, or choose from the items in the drop-down menu. The > button offers additional options: Show "Find Test Type" window, Clear Test Type, and Edit Test Type Record. (*RND* is a reserved code, and cannot be chosen when creating a test record. *RND* is used for test results created using DrugPak's Random Selection Expert.)

Random Selection Result Records

Result records for Random batches generated by this software are automatically created by the Random Selection Process. The Test Type field will be automatically filled with the code RND. RND results cannot be manually added or deleted. The only exception to this rule is when creating Alternate result records (when needed).

Test Status

This item specifies the overall status of the test. This field is often updated automatically when the user changes individual results in the substance panel. Similarly, selecting a new status from this list may make changes to the individual results in the substance panel. Default statuses include:

Unknown: One or more unknown/missing results
 Excused: Test was canceled prior to collection

• Requires Further Testing: Additional testing is required

• Inconclusive: Result is inconclusive

Negative: All substance results are negative

• Test not performed: Specimen was collected, but no test was performed on substance(s)

Positive: One or more substances is positive
 Refused: Participant obstructed the testing process

Additional test statuses can be added in the Test Statuses window (File > Test Statuses).



Click this button to set the status for all substances to negative. This button is available only if the test status is unknown, and the result is a drug test.

Result Detail

This tab displays each substance for the current test and the status for each of those substances.

- Results are changed by choosing the appropriate value from the drop-down menu
- Result labels are color-coded, depending on the value they display
- The Result Detail tab is not displayed for alcohol records

Results Panel

For drug test results, a panel (of up to 14 substances) will be displayed. If no panel is displayed, you can select a panel from a drop-down list.

- Panels can be created and modified in the Substance Panels window (File > Substance Panels).
- No substances are displayed for alcohol results; only a single result label.
- Choosing any non-positive result status for a substance will set all the substances to that result status.
- You can change results for individual substances by clicking directly on the result label (each
 double-click will advance the status to the next one), or by choosing a status from the drop-down
 menu. (The statuses will cycle through all the available options.)



This button is used to assign a new substance panel to a result. Once you have removed the existing panel, press the down arrow next to "No Panel Specified" to select a new substance panel.

After assigning a substance panel to a result record, it is possible to manually modify the substances associated with that result. The Substance Panel is not stored with the result record (i.e., after you select a panel and the substances are filled out, the result record does not "remember" which panel was used to obtain the list of substances).

General Result Information

Notification Date

This may be a required field depending on the Test Type associated with this Result File record. Enter the date the participant was notified of the test. Press F2 in this field to display the Calendar component. Double-click in this field to use the quick-entry feature. This field may be hidden depending on the settings in Preferences > Global Settings > Main Module > Results Options > Hide notification Date...

Notification Time

This may be a required field depending on the Test Type associated with this Result File record. Enter the time the participant was notified of the test, in 24-hour format, with no punctuation. *This field may be hidden depending on the settings in Preferences > Global Settings > Main Module > Results Options.*

Collection Date

This is a required field. Enter the date the participant contributed the specimen for this result (punctuation is provided).

- This value serves as the official "date of record" for the result, even if no collection was performed.
- This value is used by many reports, lookups, and automated processes in DrugPak, and its various modules.
- Press F2 in this field to display the Calendar component.

Collection Time

This may be a required field depending on the Test Type associated with this Result File record. Use this field to store the time the participant contributed as specimen for this test, in 24-hour format, with no punctuation.

Collection Site

Enter the location where the specimen was collected. Right-click or press F2 in this field to bring up the Collection Site window or press the > button to show the "Find Collection Sites" window, clear the chosen collection site, or edit the chosen collection site.

Observation Required

Check this box if it has been previously determined that this participant must be observed while contributing a specimen. If this box is checked, the label for the Collection Observed check box will appear in bold to alert the user, and the Instant Audit feature will check to make sure that the Collection Observed check box in the result record has an ON or OFF value. The default value of this check box is pulled from the value of the Observation Required check box for the participant.

Collection Observed

Check this box if the specimen collection is known to have been observed. If the check appears "grayed-out," the value is unknown.

Collected by

Enter the name of the person who collected the participant's specimen, if known. To add, edit, or delete Collector Names, press the > button and choose Edit Collector Name List.

Laboratory

Enter the location where the specimen was analyzed. Right-click or press F2 in this field to bring up the Labs window or press the > button to show the "Find Laboratory" Window, clear the chosen laboratory, or edit the chosen laboratory.

Medical Review Officer

Enter the Medical Review Officer who assumes supervisory responsibility for this test. When filling in this name, DrugPak will look for a default MRO to try to fill the name if nor you. It will look for a default MRO name in this order: random selection profile's default MRO name (*only* for RND tests) > participant's home base's default MRO name > company's default MRO > global default MRO name (see Preferences > Global Settings > Main Module > Result Options > MRO Name to view, remove or change the MRO).

- Press the > button to clear the chosen MRO name or to edit the MRO name
- An MRO name is not required for alcohol records

Date Verified

Enter the date the MRO verified the validity of this result record. This information does not apply to alcohol records. Double-click in this field to use the quick-entry feature. Press F2 in this field to display the calendar component.

Disposition

Enter the Disposition code to describe the the action taken as a result of the test status. Right-click or press F2 in this field to bring up the Codes window or press the > button to display the "Find disposition" Window, clear the chosen disposition, or edit disposition.

Notes

Two free-form memo fields are available to store general comments about this result record.

Results Letter comments

These comments will print on the Participant's Result Letter for this record, as well as on the Results File List (long-form only).

Internal Use Only comments

These comments will print *only* on the Results File listing (long-form only). These comments will *not* appear on the Participant's Result Letter for this result.

Custom

Optionally display up to four custom date fields, four custom sort fields, and four custom true/false fields. Their visibility and labels are set in Preferences > Global Settings > Main Module > Result Custom Fields.

More Info

Adulterant Detected (if any)

This field will display the value entered when prompted after checking the Adulterant box. If the Adulterant box is unchecked, entering text in this field will check it.

Occupation

This field is used to display the occupation of the participant at the time of the test. This value is pulled from the participant's record when the result record is created. *Changing the result's occupation will not change the participant's occupation.*

DOT Administration

These check boxes are used to display the DOT administration of the participant at the time of the test. The result's DOT administration is pulled from the participant's record when the result record is created. Changing the result's DOT administration will **not** change the participant's DOT administration.

Home Base

This field is used to display the home base of the participant at the time of the test. This value is pulled from the participant's record when the result record is created. *Changing the result's home base will not change the participant's home base.*

Processing Flags

The fields in the Processing Flags section are used to control various automated processes in DrugPak and its modules.

COC Received

This is the date that the chain of custody/custody and control form was received. This date cannot fall before the collection date.

Letter Printed

This is the date that a result letter was *last* printed (if at all) for this result.

Informer Task ID

This field displays the DP Informer Task ID this result was included in (if any). (*Relevant for DP Informer user only.*)

Informer Xmit Date

This field displays the date on which this result was *last* transmitted (if at all) to contact(s) via DP Informer. (*Relevant for Informer user only.*)

Exported to MRO

This is the date (if any) that this result was exported to MRO Management.

Other Export

This is the date (if any) that this result was exported using the Advanced Export feature (under the Tools menu).

Seen Via DP Live

This is the date that this result was viewed and marked as "seen" through DP Live. (Relevant for DP Live users only.)

Lab Release Date

For results imported from MRO Management, this is the date that the lab released this result record. This date is not provided by all laboratories, and may not be present. (*Relevant for MRO Management users only.*)

Reporting Cutoff

This date and time is used in conjunction with a contact's report to determine if the result is to be included when generating results letters and results lists. If this date is *prior* to a report's generation cutoff date and time, then the result record will *not* be included in the report. For results that have already been included in generated reports, and you wish to include a record in future generation of result letters and result lists, press the Update button.

Invoice

This label displays the number of the invoice on which this result appeared as a charge (if any). (Relevant for Billing users only.)

Billable

This check box determines whether a result record is eligible to be included in an invoice. When an invoice with this result has been accepted, this check box will be turned off. This will prevent this result from appearing on future invoices. (*Relevant for Billing users only.*)

Misc. Charges

Any miscellaneous charges linked to this result record will appear in list. You can add, edit, or remove miscellaneous charges by pressing the appropriate button. Optionally, you may display show only recurring charges.

1.3 Participants

Before any results are entered, company's participants need to be entered (a result record needs a participant record to be linked to). Make sure you are working with the correct company before adding or modifying participant records.

Use the Navigator Bar to add or browse participant records. Participants can be added individually, or imported from a list (XLS or CSV format).

Participant ID

A participant ID can be automatically generated, manually entered, or use the Social Security Number. (This is determined by the setting in the company's Participant/Result Options tab.) For manually entered IDs, enter a unique ID, using up to 11 alphanumeric characters. If the current company is set-up to Auto-Increment Participant IDs, then an ID will be automatically generated when you save a new record. If the current company is set-up to accept social security numbers as Participant IDs, a Social Security number must be entered.

This value is recorded in a special "shared" file, and can be used to search for a participant amongst all companies, via the Global Participant Search feature on the Find menu.

SSN - Social Security Number/Social Insurance Number

Values entered in this field may automatically be checked for uniqueness. The displayed Social Security number may be altered to mask certain characters.

- Choose Preferences > Global Settings > Main Module > Participant Options > SSN Cosmetics to change the appearance of the SSN/SIN.
- The duplicate SSN checking feature is controlled via the Social Security Checking options list in the Companies File.

Other ID

This value can be used as an alternative method of finding the participant in a list or sorting reports. Up to 20 alphanumeric characters may be entered. This field is not guaranteed to be unique. This number may be used by the MRO Management software to automatically identify the participant.

Name

Enter the participant's first name, middle initial (optional), and last name. The software can

automatically capitalize the first letter in every word (see Preferences > Global Settings > Main Module > General Options > Make names "Proper" - check this box to enable the auto-capitalizing feature).

Template button

Click this button, to take a "snapshot" of a portion of the current participant record. Non-personal information will be copied to the current company's Participant Template (activated via the Use Participant Template check box on the Companies page). Data copied to the participant template include the following fields: Home Base, Occupation, Pool Group, Include in Randoms check box, Observation Required check box, Operating Administrations, Member of "Third Party" check box, and the Link to Log Database check box. *All values copied into a company's template will be automatically entered when creating a new participant for that company.*

Include in Random Selections

If this box is checked, the participant will be eligible for random selections. If this check box is off, this participant will **not** be included in any random selections. Other criteria could also exclude a participant from random selection eligibility (i.e., this check box alone will not determine the participant's eligibility for random selection). See the Participant Filters page of the Random Selection Profiles window for additional factors (such as DOT status, home base, and pool group) that determine a participant's eligibility for random selection.

Terminated

This check box allows an active participant to be terminated without deleting their test result records. Terminated participants will not be included in Random Selections, and can be omitted from certain reports and automated processes. A terminated participant can later be re-activated by unchecking this box.

- For a participant to be included on certain reports, his/her termination status must be correct. Many processes will automatically or optionally exclude terminated participants.
- When checking the Terminated box, today's date will optionally be automatically entered in the Termination Date field. (This is determined by the setting in Preferences > Global Settings > Main Module > Participant Options > Auto-Enter Termination Date.)
- Entering a date in the Termination Date field is for general information purposes only, and has no effect on status (i.e., if you wish to terminate a participant, check the Terminated check box.)

Home Base

A home base is the location to which the participant reports for work. Selecting a home base for a participant is **optional**, and is **not** necessary if all the participants work at the same location. To enter a home base, choose from the drop-down menu, or open the Find Home Base window by right-clicking or pressing F2 in the home base field. (If the home base does not yet exist, press the Home Base button along the top of the DrugPak screen, and create a new home base.)

- The home base can be used for sorting and grouping of report items.
- The home base can be used to determine eligibility for random selections.
- The home base (if entered) of a participant will automatically be copied to a result record when creating a new result record for a participant.

Occupation

This code will represent the occupation under which the participant is employed. To enter an occupation, choose from the drop-down menu, or open the the Find Occupation window by right-clicking or pressing F2 in the occupation field. (If the occupation does not yet exist, press the Codes button along the top of the DrugPak screen, choose Occupations under the Filter by Type option, and create a new occupation.)

- The occupation can be used for grouping report items.
- The occupation can be used to determine eligibility for random selections.
- The occupation (if entered) of a participant will automatically be copied to a result record when creating a new result record for this participant.

DOT Administrations

Select the appropriate DOT administration(s) for this participant.

• The DOT administration (if chosen) of a participant will automatically be copied to a result record when creating a new result record for a participant.

DOT administrations:

- FAA: Federal Aviation Administration
- FMCSA: Federal Motor Carrier Services Administration
- FRA: Federal Railroad Administration
- FTA: Federal Transit Administration
- PHMSA: Pipeline and Hazardous Materials Safety Administration (formerly known as RSPA)
- USCG: United States Coast Guard

Pool Group

A pool group is any conceivable grouping of participants (e.g., shift 1, shift 2, shift 3, etc.). Selecting a pool group for a participant is **optional**. To enter a pool group, choose from the drop-down list, or open the Find Pool Group window by right-clicking or pressing F2 in the pool groups field. (If the pool group does not yet exist, press the Codes button along the top of the DrugPak screen, choose Pool Groups under the Filter by Type option, and create a new occupation.)

Note: between the pool group and the hire date & termination date you may see one or two check boxes. These are customizable check boxes that can be used for anything you like. See Global Settings > Participant Options for the settings to hide or display these check boxes and to modify their labels.

Hire Date

MM/DD/YYYY format (punctuation is automatically provided).

Terminated Date

MM/DD/YYYY format (punctuation is automatically provided). This field does not affect the participant's Termination Status; the Terminated check box needs to be on for the participant to be considered terminated.

Other Date

MM/DD/YYYY format (punctuation is automatically provided). This field can be used for any purpose. The label for this field is determined by the value of the "Other Date" field in the Companies window. If there is no label entered in the "Other Date Label" field for the active company, the value entered in the Global Settings > Participant Options is used.

Physical Exam Date

MM/DD/YYYY format (punctuation is automatically provided). Use this field to indicate the participant's next scheduled exam date. This will make it easy to print a list of participants who are due for their physicals.

Birth Date

MM/DD/YYYY format (punctuation is automatically provided).

Note: below the other date, you may see one or two other date fields. These are customizable date fields that can be used for anything you like. See Global Settings > Participant Options for the settings to hide or display these date fields and to modify their labels.

Address/Phone

Street Address

Enter the street address on the first line.

City, State Zip

Enter City, State, and Zip Code together on the second line.

- The software will optionally capitalize the first letter in every word (see Preferences > Global Settings > Main Module > General Options > Make names "Proper" check this box to enable the auto-capitalizing feature).
- This information will print on Participant Mailing Labels, and other reports.

Phone

Standard U.S. format is used. DrugPak will automatically insert standard punctuation.

License

License

Enter the participant's driver's license number. The user must manually insert any required/desired punctuation.

State

Enter the two-character postal code for the state that issued the license.

Expiration Date

MM/DD/YYYY format (punctuation is automatically provided) - license expiration date.

License Class

Class for this license.

More Info

Third Party

This box will be visible if the View "Third Party" Data box in Preferences > Global Settings > Participant Options is checked. If this participant is a member of a Third-party testing program (i.e., test results for this participant are not stored in this software), then this box should be checked and membership information for this participant should be entered in the third party record.

Observation Required

The value of this check box determines the default value of the Observation Required check box for this participant's test result records. Changing this value will not affect any existing test records, it will affect only *new* test records.

Gender

Click the appropriate button to specify the participant's gender. This information can be used to determine the required gender of the specimen collector if this participant's collection must be observed. (See Observation Required.)

Rehab Completed

If the participant has completed a drug rehabilitation program, enter the date the program was completed.

Alpha Sort Key

This field will be automatically completed when you enter the participant name. It is used to sort reports alphabetically by participants' last name (not all reports have this sorting option). If the alphasort value for a participant is incorrect, choose Tools > Advanced > Update Participant Names / Alphasort.

Third Party

This tab will be visible if the View "Third Party" Data box in Preferences > Global Settings > Participant Options is checked.

Choose the third party code from the drop-down menu, or right-click on this field to bring up the find third party window. This code represents the "Third Party" who is actually administrating and tracking this participant's testing results.

Member Number

Enter the member number used by the third-party to identify this participant.

Date Joined

Enter the date that the participant joined the third party.

Last Verification Date

Enter the last date the third-party consortium was contacted to verify the participant's participation in the third-party's drug testing program.

Last Test Date

Enter the most recent date on which the participant was tested by the third-party. This date will appear in the Last Test Date field on the main Participant File screen. If the participant is not a member of a third party, then this data field will be automatically updated by DrugPak when result records are entered.

Notes

Notes

Notes entered here will appear on long form of the participants list.

Misc. Charges This menu item will be visible only to those users who have installed the DrugPak Billing module.

All miscellaneous charges assigned to this participant will be displayed here. You can optionally show or hide recurring charges and participant charges. See the miscellaneous charges topic for more information.

1.4 Codes

Codes are used throughout the system to provide consistent, easily-entered abbreviations for frequently used terms. Codes include Occupations, Pool Groups, Dispositions, Substances, and Test Types.

Filter by Type

The type of code displayed is determined by the button chosen here.

Code

This is up to 3 alphanumeric characters and must be unique for each code of a particular type.

Description

Use this to store the code's description. This description will appear wherever the code appears. The software will automatically capitalize the first letter of the first word in this description.

Comments

Use this to store general comments about this code. Comments are optional.

The codes screen for occupations, substances and test types have additional options, and are

described below.

Occupation Codes

Code, Description, and Comments

Same options/behavior as above

MIS Report Category

Use this list box to match the current code with one of the fixed MIS report occupation categories. The contents of this list box will vary depending on what the Code Type is selected. The occupations available in the list box are determined by the item chosen in the DOT Administration list box (see below). Any occupation code with an MIS report category of "Undefined" will cause associated participant and result records to be omitted from the MIS report.

DOT Administration

Use this list to determine the appropriate DOT administration for an occupation code. This setting will determine the occupations available in the MIS Report Category list box (see above).

Substances

Code, Description, and Comments

Same options/behavior as above

MIS Report Category

Use this list box to match the substance code with one of the fixed MIS report substance categories. Except for alcohol, any substance code with an MIS report category of "Not Reported" will not appear on your MIS report.

Test Types

Code, Description, and Comments

Same options/behavior as above

MIS Report Category

Use this list box to match the test type code with one of the fixed MIS report test type categories. Any test type code with an MIS report category of "Undefined" will *not* appear on your MIS report.

Require missing notification info in Result Records

If this box is checked, all tests with that test type code will require Notification Date, Notification Time, and Collection Time fields, unless overridden by the three check boxes under Preferences > Global Settings > Main Module > Incomplete Test Options > When test type requires notification info...

1.5 Collection Sites

The collection site is the location where a participant submits his or her sample.

Code

This may be up to 8 alphanumeric characters long. Each collection site must have a unique code.

Site Name

Enter the site name as you would have it appear on a mailing label. This name will appear wherever the code appears. The software will optionally capitalize the first letter of every word in the site name ('Make names "Proper" setting in Preferences > Global Settings > Main Module > General Options).

Active

This setting is used to allow inclusion or exclusion of a collection site in the Find Collections Sites window, and in certain reports.

Contact Box

By default, this box will display the primary contact's name and address. Each click of the > button will scroll through the contact's (a) address, (b) phone, fax, and e-mail address, (c) custom sort fields, (d) custom date fields, and (e) custom true/false fields. (See Preferences > Global Settings > Main Module > Contact Options to set custom field labels.)

Contacts > Primary Contact

These fields provide the name, street address, city, state, zip (+4 supported), phone number, extension, fax number, e-mail address of the primary contact person for this collection site. The > button will give you the option to:

- edit the contact's settings
- · copy the contact's address to the Windows clipboard
- · lookup and assign a different primary contact for this collection site
- create a new contact for this collection site

Contacts > All Contacts

Since a collection site can have more than one contact, the All Contacts tab will display all contacts linked to this collection site.

New Contact

To create a new contact for this collection site, press the New Contact button.

Edit Contact

To edit the name, address, and settings of a contact, choose a contact and press the Edit Contact button.

Link Contact

To link an existing contact to this collection site, pres the Link Contact button, find the appropriate contact in the Find Contact window, and double-click their name. This will add that contact's name to the All Contacts list. If the contact doesn't yet exist, you must hit the New Contact button to create the contact. That contact will then be linked to this collections site.

Unlink Contact

Each contact in this list is linked to this collection site. To unlink a contact from this collections site, choose the contact, then press the Unlink Contact. This will not delete the contact, only unlink the contact from this collection site.

Set Primary

A collection site can have only one primary contact (shown in the Primary Contact tab). To change the primary contact, choose a different contact and press the Set Primary button. Now, the newly selected primary contact and information will be displayed in the Primary Contact tab.

Contacts > Physical Address

The physical address is the street address of the collection site. In many cases it will be the same as the street address of the primary contact, but not always. Initially, the physical address will come from the primary contact's address.

Custom Fields

Custom fields are optional. There are four date fields, four sort fields, and four true/false fields. The labels for these fields are assigned in Preferences > Global Settings > Main Module > Collection Site

Options.

Other Info

Other information includes the collection site's hours of operation, whether they provide post-accident service, and post-accident phone and hours. These settings are optional.

Internal Comments

Optionally enter comments about this collection site. These notes will not appear on reports or be viewable to DP Live users unless the appropriate settings are changed:

- Collection Site List: Detail Level > Show Internal Comments
- DP Live: Preferences > Global Settings > DP Live Module > Skin Options > Miscellaneous options > Show Private Collection Site Notes

Public Notes

Optionally enter comments about this collection site.

- Comments will be seen by DP Live users
- Comments can be hidden or shown on the collection site list (Collection Site List: Detail Level > Show Public Notes)

Collectors

This list displays the names of the collectors for selected collection site.

Billing (visible for DrugPak Billing users only)

Default Price Schedule

A price schedule determines how much to will be charged for each test collected at a specific collection site.

- Choose to use either the billing profile's price schedule or assign a price schedule
- By default, a new collection site will use the billing profile's schedule
- The default price schedule may be overridden by price schedule(s) (if any) listed in the grid

The price schedule grid allows you to assign company-specific price schedules for a collection site. For example, let's assume the default price schedule for a collection site is set to use its own price schedule, and you have created a company-specific price schedule for Alpha trucking. When calculating invoices, the collection site charges for Alpha Trucking will use the prices in the company-specific price schedule. All other companies will use the *default* price schedule.

Summary: The price for a collection site fee will be determined in the following order: billing profile's price schedule (if set) > company-specific price schedule for a collection site (if set) > standard collection site price schedule (if set).

1.6 Labs

The lab is the location where a participant's sample is analyzed.

Code

This may be up to 8 alphanumeric characters long. Each lab must have a unique code.

Site Name

Enter the site name as you would have it appear on a mailing label. This name will appear wherever the code appears. The software will optionally capitalize the first letter of every word in the site name ('Make names "Proper" setting in Preferences > Global Settings > Main Module > General Options).

Active

This setting is used to allow inclusion or exclusion of a lab in the Find Laboratories window, and in certain reports.

Contact Box

By default, this box will display the primary contact's name and address. Each click of the > button will scroll through the contact's (a) address, (b) phone, fax, and e-mail address, (c) custom sort fields, (d) custom date fields, and (e) custom true/false fields. (See Preferences > Global Settings > Main Module > Contact Options to set custom field labels.)

Contacts > Primary Contact

These fields provide the name, street address, city, state, zip (+4 supported), phone number, extension, fax number, e-mail address of the primary contact person for this collection site. Use the button to:

- edit the contact's settings
- · copy the contact's address to the Windows clipboard
- lookup and assign a different primary contact for this lab
- · create a new contact for this lab

Contacts > All Contacts

Since a lab can have more than one contact, the All Contacts tab will display all contacts linked to this lab.

New Contact

To create a new contact for this lab, press the New Contact button.

Edit Contact

To edit the name, address, and settings of a contact, choose a contact and press the Edit Contact button.

Link Contact

To link an existing contact to this lab, pres the Link Contact button, find the appropriate contact in the Find Contact window, and double-click their name. This will add that contact's name to the All Contacts list. If the contact doesn't yet exist, you must hit the New Contact button to create the contact. That contact will then be linked to this lab.

Unlink Contact

Each contact in this list is linked to this lab. To unlink a contact from this lab, choose the contact, then press the Unlink Contact. *This will not delete the contact, only unlink the contact from this lab.*

Set Primary

A lab can have only one primary contact (shown in the Primary Contact tab). To change the primary

contact, choose a different contact and press the Set Primary button. Now, the newly selected primary contact and information will be displayed in the Primary Contact tab.

Contacts > Physical Address

The physical address is the street address of the lab. In many cases it will be the same as the street address of the primary contact, but not always. Initially, the physical address will come from the primary contact's address.

Custom Fields

Custom fields are optional. There are four date fields, four sort fields, and four true/false fields. The labels for these fields are assigned in Preferences > Global Settings > Main Module > Lab Options.

Notes

Optionally add notes about a lab.

Billing (visible for DrugPak Billing users only)

Default Price Schedule

A Price Schedulesdetermines how much to will be charged for each test analyzed at a specific laboratory.

- Choose to use either the billee's price schedule or assign a price schedule
- By default, a new lab will use the billee's price schedule
- The default price schedule may be overridden by price schedule(s) (if any) listed in the grid

The price schedule grid allows you to assign company-specific price schedules for a lab. For example, let's assume the default price schedule for a lab is set to use its own price schedule, and you have created a company-specific price schedule for a company (for example, Alpha trucking). When calculating invoices, the lab charges for Alpha Trucking will use the prices in the company-specific price schedule. All other companies will use the *default* price schedule.

Summary: The price for a lab fee will be determined in the following order: billing profile's price schedule (if set) > company-specific price schedule for a lab (if set) > standard lab price schedule (if set).

1.7 Third Parties

A "Third Party" is a drug testing administrator other than your own company. If you yourself are a third-party testing administrator, you will not want to use the "Third Party" features to manage testing information.

Sometimes a transportation company using this software will hire independent contractors who are members of another testing consortium. Although the user of this software does not directly manage that independent contractor's test results, the user must be able to verify that the independent contractor continues to participate in a legitimate testing program. Under these circumstances, "Third Party" data should be maintained to facilitate this verification. Membership should be reviewed and verified for continued eligibility every six months, or according to the most recent applicable regulations.

This window is available only when the Preferences > Global Settings > Main Module > Participant

Options > View Third Party Features is checked.

Code

This may be up to 8 alphanumeric characters long. Each third party must have a unique code.

Site Name

Enter the site name as you would have it appear on a mailing label. This name will appear wherever the code appears. The software will optionally capitalize the first letter of every word in the site name ('Make names "Proper"' setting in Preferences > Global Settings > Main Module > General Options).

Active

This setting is used to allow inclusion or exclusion of a third party in the Find Third Parties window, and in certain reports.

Contact Box

By default, this box will display the primary contact's name and address. Each click of the > button will scroll through the contact's (a) address, (b) phone, fax, and e-mail address, (c) custom sort fields, (d) custom date fields, and (e) custom true/false fields. (See Preferences > Global Settings > Main Module > Contact Options to set custom field labels.)

Contacts > Primary Contact

These fields provide the name, street address, city, state, zip (+4 supported), phone number, extension, fax number, e-mail address of the primary contact person for this third party. Use the > button to:

- edit the contact's settings
- · copy the contact's address to the Windows clipboard
- lookup and assign a different primary contact for this third party
- create a new contact for this third party

Contacts > All Contacts

Since a third party can have more than one contact, the All Contacts tab will display all contacts linked to this third party.

New Contact

To create a new contact for this third party, press the New Contact button.

Edit Contact

To edit the name, address, and settings of a contact, choose a contact and press the Edit Contact button.

Link Contact

To link an existing contact to this third party, press the Link Contact button, find the appropriate contact in the Find Contact window, and double-click their name. This will add that contact's name to the All Contacts list. If the contact doesn't yet exist, you must hit the New Contact button to create the contact. That contact will then be linked to this lab.

Unlink Contact

Each contact in this list is linked to this third party. To unlink a contact from this third party, choose the contact, then press the Unlink Contact. This will not delete the contact, only unlink the contact from this third party.

Set Primary

A third party can have only one primary contact (shown in the Primary Contact tab). To change the primary contact, choose a different contact and press the Set Primary button. Now, the newly selected

primary contact and information will be displayed in the Primary Contact tab.

Contacts > Physical Address

The physical address is the street address of the third party. In many cases it will be the same as the street address of the primary contact, but not always. Initially, the physical address will come from the primary contact's address.

Custom Fields

Custom fields are optional. There are four date fields, four sort fields, and four true/false fields. The labels for these fields are assigned in Preferences > Global Settings > Main Module > third party Options.

Notes

Optionally add notes about a third party.

1.8 Contacts

A contact is a person associated with one or more locations. This individual may be the contact for a company, home base, collection site, lab, and/or third party (i.e., a contact can be linked to multiple locations).

- They may also be a DrugPak user, an MRO, or a DP Live user
- A contact can be set up to receive reports, log on to your DP Live site* and/or call in and get results through Facts-on-Demand **
- An important feature of a contact is that you can choose what a contact can and cannot see in their reports. This is done through the use of Permissions and Locations. This can be done broadly for a contact, or more specifically on a per-report basis.
- * DP Live license is required
- ** Facts-on-Demand license is required

Display Name

Enter the contact's full name.

Title

Optionally, enter the contact's title.

Address

Organization Name

This name is entered for you when a location (lab, home base, company, or collection site) is created and assigned to this contact. Since multiple contacts can be linked to a single location, changing one contact's organization name will not change the location's name. However, if you change a location's name, you will be prompted to update the organization name for all contacts linked to that location.

Address and Notes

Enter the contact's street address, city, state, zip, fax number, and e-mail address(es). Use the optional notes field to enter any additional information about the contact.

- A fax number is required for a contact to receive faxed reports via DP Informer*
- An e-mail address is required for a contact to receive e-mailed reports via DP Informer*

*DP Informer is licensed separately.

<u>Additional</u>

Include in bulk e-mails

Check this box to include contact when using DP Informer's Broadcaster feature to send bulk e-mail (DP Informer* user only.)

Include in bulk faxes

Check this box to include contact when using DP Informer's Broadcaster feature to send bulk faxes (DP Informer* user only.)

Custom Fields

Custom fields are optional. There are four date fields, four sort fields, and four true/false fields. The labels for these fields are assigned in Preferences > Global Settings > Main Module > Contact Options.

*DP Informer is licensed separately.

Reports

- Add Report: This will present a list of available report grouped by category
- Edit Report: After selecting an existing report, this will allow you to modify and save the report's settings
- Remove Report: This allows you to remove a report from a contact
- Print Report: Allows you to print a report that has been saved for a contact
- Change Cutoff: Allows you to change the cutoff date for data to be included in a report. This is used for results letters, results lists and all random selection reports. Any result or data entered or modified after the cutoff date and time will be included the next time the report is generated or printed. Changing the cutoff date to an earlier date will widen the scope of the report.
- **Report Info:** After choosing a report, this will display a window showing the number of records that will be included in the report

See Contacts and Their Reports topic for more information of contact-specific reports.

Task Options (visible to DP Informer user only)

These options are used for sending reports via fax and e-mail. You may override these settings per report in a report's task options settings.

Default Status

This setting determines what the default task status will be for generated tasks.

- The default value for this option is "Pending" (waiting to be sent)
- Use On-Hold for contacts with non-secure fax machines. This setting will cause documents to be created, but held in the task list for a user to manually change to 'pending' after verifying that the contact is available to receive the fax.

Send ASAP

Check this box to set tasks for this contact to be sent next time Transmission Center sends reports. Otherwise, uncheck this box, and select a specific day and time for reports to be sent.

Cover Message

Optionally enter a cover message for faxes and e-mail messages. The cover message will be appended to the fax and/or e-mail cover page.

- Choose to send the cover message once, always or never
- When Send Once is chosen, and a report is generated for this contact, the setting will revert to

Never Send

E-mail Options > Cover File

Leave this field blank if you want this customer to receive the default e-mail body message specified in the Communication Settings (Preferences > Communication Settings). If this customer should receive a different message, select the text file which contains the desired e-mail body message. See the Communication Settings topic for more information about e-mail body messages and their capabilities.

E-mail Options > Export Format

This setting determines the file format for reports that are attached to e-mail tasks. By default, the format for e-mail attachments is PDF. You choose also choose from other available formats (Excel, Word, HTML, etc.)

E-mail Options > Encryption Password

Setting a password will encrypt files attached to e-mail messages for this contact. The message recipient must download and install the Attachment Decoder to decrypt the message.

Fax Options > Cover file

Leave this field blank if you want this customer to receive the default cover page file specified in Communication Settings (Preferences > Communication Settings). If this customer should receive a different file, then select the desired file by pressing the folder button. (Acceptable file formats are FCP and TXT (plain text).) See the Communication Settings topic for more information about fax body messages and their capabilities.

Dial Prefix

If you need to specify a special dial prefix in order to call a particular customer, enter it here. This may happen when your customer's fax number is in the same area code as you, but you still need to dial a 1 in order to place the call. In such a circumstance, enter 1 in this box. When Transmission Center dials this customer, it will first dial the Dial Prefix for Outside Line (if specified in the *Communication Settings*), then it will dial the prefix specified here, then it will dial the appropriate fax number (omitting the area code if appropriate).

Do not enter a "1" in this field to dial a regular long distance number (i.e., the customer's area code is different than yours). The Transmission Center automatically compares the phone number area code with your area code, and will automatically dial a "1" followed by the area code if they are different.

See Task Options topic for more information on a contact's task options.

Remote Access (visible to DP Live* and Facts-on-Demand* users only)

DP Live Settings

- The user ID and password are used by the contact to access DP Live
- Skin: this determines the look and feel of the DP Live web pages. If you have custom DP Live skins, you can choose them from this menu.

Facts-on-Demand Settings

The FOD Acct and FOD PIN are used by Facts-on-Demand to verify the user's identity.

FOD Report

Use this menu to determine which result letter that the contact should receive when calling into the Facts-on-Demand service.

Permissions

Permissions are settings that determine which records a contact can view via reports and DP Live.

^{*} DP Live and Fact-on-Demand are licensed separately.

The settings include:

- Security Profile: The security profile sets a base level of permissions (security profiles are accessible from the DP Live Administrator menu).
- Company Data Access Based On: A contact can view data based on Location (set in the Location tab), Consortium (set by choosing a consortium from the menu when this option is chosen), or Filter (which is created in the filter panel at the bottom of the window).

For example, if a contact named James Madison is linked to Alpha Marbles, the reports for Mr. Madison will include records linked to Alpha Marbles, and all their participants. If Mr. Madison has a participants filter assigned (in permissions tab) that is designed to display only non-DOT participants and their results, then Mr. Madison's reports will display records associated with non-DOT Alpha Marbles participants.

Filters set on a contact's reports (Reports tab) may further limit the records visible on a report.

Locations

This setting determines which locations' records will be viewable by this contact. For example, a contact named Kathy Hopkins is linked to a company named Alpha Trucking -- when any reports are generated for Kathy Hopkins, *only* records linked to Alpha Trucking and/or its participants will appear in the report. Locations include company, home base, lab, collection site, lab, third party, (DrugPak) user, and MRO.

To add a location to a contact,

- 1. Press the Add Location button at the bottom left. A menu of locations will appear below the button.
- 2. Choose which type of location you would like to add.
- 3. Choose the desired location from the Find window.
- 4. Press the OK button. This new location will now appear in the list of locations in the Locations tab.

Filters set on a contact's reports (Reports tab) may further limit the records visible on a report.

Important Note: the location(s) chosen in the Locations tab will determine record access for this contact **only** when the *Company Data Access Based On:* setting in the Permissions tab is set to **Location**. If the *Company Data Access Based On:* setting in the Permissions tab is set to either Consortium or Filter, then this contact's record access will be determined by the chosen based on the consortium or filter, and **not** on the location(s) listed in the Locations tab.

1.9 Contacts and Their Reports

Note to Informer 5.x users: Informer company preferences have been converted into contacts. And those contacts are linked to companies and/or home bases, and already have result letters/result lists, e-mail address(es) and/or fax numbers associated with them. To find/edit a contact's report or delivery options, you can go to the Contacts > All Contacts list in the desired company or home base record, or find the contact through the Contact window.

Who receives reports generated by Informer?

Any contact that has a report configured for them can receive that report via e-mail and/or fax.

How do I find a contact?

You can (1) search for a contact from the Contact window, or (2) view the contacts associated with a location (company, home base, collections site, or lab).

1) Open the Contacts window (via the icon, or File > Contacts, or Ctrl + 4) and press the Find button. If

you press the Search Now button, all contacts will be displayed for all locations and location types. If you want to limit your search, you can do so by selecting a location type (company, home base, etc) and/or specific location. For example, if you wanted to see all contacts associated with Alpha Trucking Company, you would select Company as the Location Type, and Alpha Trucking Company as the Location. Then pressing the Search Now button will display a list of all contacts associated with Alpha Trucking Company. (Double-clicking a contact will open the contact window and display the chosen contact.)

2) Select the desired company/home base/collection site/lab > select the Contact > All Contacts tab. This list will display all contacts associated with that location. (Double-clicking a contact will open the contact window and display the chosen contact.)

How do I add a contact?

You can add a contact from the location to which the contact should be linked, or from the Contacts window. If you add a contact from a location, the contact will automatically be linked to that location; if you add a contact in the Contacts window, that contact will *not* be associated with a location until you add a location to that contact.

- From a location: open the company/home base/collection site/lab window > select the desired company/home base/collection site/lab > open the Contacts > All Contacts tab > press the New Contact button. (A new contact will be created that is linked to that location.) Enter the display name, organization name, and (if you want to send reports to them) their e-mail address and/or fax number.
- From the Contacts window: open the Contacts window > press the + button. A new contact will be created. Enter the display name, organization name, and (if you want to send reports to them) their e-mail address and/or fax number. If the contact is to receive any reports that are specific to a location, you must also link the contact to that/those location(s).

How do associate a contact with a location?

Find the contact (see above) > select the Locations tab > press the Add Location button > choose a location type (company, home base, etc.) > select a location by double-clicking a location, or by selecting a location, and pressing the Ok button

- The list in the Locations tab will show the location(s) associates with to this contact
- A contact can be linked to multiple locations
- It is not necessary for a contact to be linked to a location.

How do I add a report to a contact?

Find the contact (see above) > select the Reports tab > Add Report button > (reports are grouped into four categories) from the appropriate report category, choose a report > press the OK button. The report settings window will appear. You will need to review and/or change the report settings. Once you are content with the settings, press the Save button (you can always modify the report settings for this contact again in the future). Remember that the report that you just created, and its settings are specific to that contact. Any changes made to one contact's report will not affect the same report for another contact.

- Alternate method of assigning a report to a contact: Select a report from the Reports menu > configure desired settings > press Select Contact button > select a contact (see "How do I add a contact?" above). A message will appear asking "The contact doesn't have this report set up. Continue with the contact's default delivery settings? Yes/No" > press Yes to add the just-configured report to the selected contact > press the Save button.
- Billing reports cannot be added to a contact, except for invoices, which are automatically attached to the appropriate billing contact.

How do I modify the settings for a report that is assigned to a contact?

Find the contact (see above) > select the Reports tab > select the report that you wish to modify > press the Edit button > make any necessary changes > press the Save button > close the report window.

What is required for a report to be delivered via fax or e-mail?

- 1. A contact linked to the correct location
- 2. A fax number and/or e-mail address for contact
- 3. A report associated with contact
- 4. Report's destination set to e-mail and/or fax

1.10 Home Bases

Home bases are used to distinguish various locations of a single company. If a company has only one location, there is no need to create home bases.

Show for "current company" only

Uncheck this box to view home bases for all companies, not just the current company.

Company

This box will display which company the current home base is linked to. You cannot change the company that a home base is linked to, therefore this field is read-only.

Code

This may be up to eight alphanumeric characters long. Each home base must have a unique code.

Site Name

Enter the site name as you would have it appear on a mailing label. This name will appear wherever the code appears. The software will optionally capitalize the first letter of every word in the site name ('Make names "Proper"' setting in Preferences > Global Settings > Main Module > General Options).

Active

This setting is used to allow inclusion or exclusion of a home base in the Find Home Base window, and in certain reports.

Contact Box

By default, this box will display the primary contact's name and address. Each click of the > button will scroll through the contact's (a) address, (b) phone, fax, and e-mail address, (c) custom sort fields, (d) custom date fields, and (e) custom true/false fields. (See Preferences > Global Settings > Main Module > Contact Options to set custom field labels.)

Contacts > Primary Contact

These fields provide the name, street address, city, state, zip (+4 supported), phone number, extension, fax number, e-mail address of the primary contact person for this collection site. The > button will give you the option to:

· edit the contact's settings

- · copy the contact's address to the Windows clipboard
- lookup and assign a different primary contact for this home base
- · create a new contact for this collection site

Contacts > All Contacts

Since a home base can have more than one contact, the All Contacts tab will display all contacts linked to this home base.

New Contact

To create a new contact for this home base, press the New Contact button.

Edit Contact

To edit the name, address, and settings of a contact, choose a contact and press the Edit Contact button.

Link Contact

To link an existing contact to this home base, press the Link Contact button, find the appropriate contact in the Find Contact window, and double-click their name. This will add that contact's name to the All Contacts list. If the contact doesn't yet exist, you must hit the New Contact button to create the contact. That contact will then be linked to this home base.

Unlink Contact

Each contact in this list is linked to this home base. To unlink a contact from this home base, choose the contact, then press the Unlink Contact. This will not delete the contact, only unlink the contact from this home base.

Set Primary

A home base can have only one primary contact (shown in the Primary Contact tab). To change the primary contact, choose a different contact and press the Set Primary button. Now, the newly selected primary contact and information will be displayed in the Primary Contact tab.

Contacts > Physical Address

The physical address is the street address of the home base. In many cases it will be the same as the street address of the primary contact, but not always. Initially, the physical address will come from the primary contact's address.

Custom Fields

Custom fields are optional. There are four date fields, four sort fields, and four true/false fields. The labels for these fields are assigned in Preferences > Global Settings > Main Module > Home Base Options.

Result Defaults

Laboratory

Select the lab that you would like to appear by default in new tests records for participants within this home base.

- The company's default lab will be overridden by the default lab assigned to a home base (if assigned) for results created for participants within that home base.
- If the company's default lab is blank, the default lab assigned in the global settings (if assigned) will be used (see Preferences > Global Settings > Main Module > Result Options > Lab to view, remove or change the global default lab).

For example, Jack Straw is assigned to home base North within Igloo Trucking company. The default lab for the North home base is Alpha Diagnostics. When a new test result is created for Jack Straw, that test will have Alpha Diagnostics as the lab. If that home base did not have a default lab, then the

default lab assigned to Igloo Trucking would be used for Jack Straw's test. If Igloo Trucking did not have a default lab, then the lab assigned in the global settings would be used. If no default lab was assigned in the global settings, then the new test for Jack Straw would have no lab - you would have to choose it manually.

Drug Test Collection Site

Select the drug test collection site that you would like to appear by default in new tests records for participants within this home base.

- The company's default drug test collection site will be overridden by the default drug test collection site assigned to a home base (if assigned) for drug test results created for participants within that home base.
- If the company's default drug test collection site is blank, the default drug test collection site assigned in the global settings (if assigned) will be used (see Preferences > Global Settings > Main Module > Result Options > Drug Test Collection Site to view, remove or change the global default drug test collection site).

As in the example given above for default labs, DrugPak will look for a default drug test collection site in this order: home base > company > global setting.

Alcohol Test Collection Site

Select the alcohol test collection site that you would like to appear by default in new tests records for participants within this home base.

- The company's default alcohol test collection site will be overridden by the default alcohol test collection site assigned to a home base (if assigned) for alcohol test results created for participants within that home base.
- If the company's default alcohol test collection site is blank, the default alcohol test collection site assigned in the global settings (if assigned) will be used (see Preferences > Global Settings > Main Module > Result Options > Alcohol Test Collection Site to view, remove or change the global default alcohol test collection site).

As in the example given above for default labs, DrugPak will look for a default alcohol test collection site in this order: home base > company > global setting.

Billing (tab is visible only for DrugPak Billing* module)

Billee

The billee's account number and location information is displayed here. (See the billee topic for more information about billees and their settings.) Press the > button to:

- Select (a different) Billee
- Edit Billee (settings)
- Create a New Billee

Test Price Schedule

By default, the billee will use its own price schedule. If you wish to override the billee's price schedule, you may select a different price schedule here. Any test with this home base will use the test price schedule assigned here. Press the > button to:

- · Select (a different) Price Schedule
- Edit the Price Schedule (except when the Test Price Schedule is set to (Use the Billee's Price Schedule))
- Create New Price Schedule

Additional Rule Set

By default, the billee will use its own (optional) custom rule set. If you wish to override the billee's custom billing rules, you may select a different rule set here. Any test with this home base will use the additional rule set assigned here. Press the > button to:

- Select (a different) Rule Set
- Edit the Price Schedule (except the Custom Rule Set is set to (No Additional Rules))
- Create New Price Schedule

Notes

Use this box to enter any notes about this home base.

Misc. Charges (tab is visible only for DrugPak Billing* module)

This grid will display miscellaneous charges (if any) assigned to this home base. You can add, edit or remove miscellaneous charges by pressing the appropriate button.

* DP Billing is licensed separately.

1.11 Companies

Company ID

The Company ID is a shorthand reference code for a company.

- This can be up to eight alphanumeric characters and must be unique
- · A blank company ID is not permitted
- Company IDs can be (optionally) automatically assigned by DrugPak (see Preferences > Global Settings > Main Module > Company Options > Auto-Increment Company ID - check this box to let DrugPak assign the company IDs for you)
- The company ID of the current company always appears with the company name on the status bar

Company Name

The company name field appears on every report, and the name of the current company always appears with the company ID on the status bar. DrugPak can optionally capitalize the first letter of every word in this field (see Preferences > Global Settings > Main Module > General Options > Make names "Proper" - check this box to enable the auto-capitalizing feature).

Account Number

This value can be used as the DP Billing* export account number to identify this company. Otherwise, this field is be optional, extra identifier for a company and can be used to find records in the Find Company window.

* DP Billing is licensed separately.

Other ID

This value can be used as an alternative method of finding the company in a list. Up to 20 alphanumeric characters may be entered. This field is not guaranteed to be unique.

Active/Inactive Status

When this box is unchecked, the company's participants will be *ineligible* for participation in random selections.

Contacts > Primary Contact

These fields provide the name, street address, city, state, zip (+4 supported), phone number, extension, fax number, e-mail address of the primary contact person for a company. Use the > button to:

- · edit the contact's settings
- · copy the contact's address to the Windows clipboard
- lookup and assign a different primary contact to a company
- create a new contact for a company

Contacts > All Contacts

Since a company can have more than one contact, the All Contacts tab will display all contacts linked to this company.

New Contact

To create a new contact for this lab, press the New Contact button.

Edit Contact

To edit the name, address, and settings of a contact, choose a contact and press the Edit Contact button.

Link Contact

To link an existing contact to this company, pres the Link Contact button, find the appropriate contact in the Find Contact window, and double-click their name. This will add that contact's name to the All Contacts list. If the contact doesn't yet exist, you must hit the New Contact button to create the contact. That contact will then be linked to this company.

Unlink Contact

Each contact in this list is linked to this company. To unlink a contact from this company, choose the contact, then press the Unlink Contact. This will not delete the contact, only unlink the contact from this company.

Set Primary

A company can have only one primary contact (shown in the Primary Contact tab). To change the primary contact to a contact linked to this company, choose a different contact and press the Set Primary button. Now, the newly selected primary contact and information will be displayed in the Primary Contact tab.

Contacts > Physical Address

The physical address is the street address of the company. In many cases it will be the same as the street address of the primary contact, but not always. Initially, the physical address will come from the primary contact's address.

Participants/Result Options

Use Participant Template

Check this box to enable the participant template for this company. See the template topic for more information about the use of the participant template.

Participant ID Options

Choose from three methods of assigning a participant ID:

- Auto-Increment DrugPak will automatically assign participant IDs for you (1, 2, 3, etc...)
- Participant ID is SSN the participant ID will be the same as the participant's Social Security number
- Enter Manually this requires you to manually enter a participant ID

Social Security Checking

When entering participants, DrugPak will automatically look for duplicate Social Security number for you. Choose to search only within this company, or search all companies.

Label for "Other Date" Field

Optionally enter a label for the "Other Date" field in the participants window. If this field is blank, the label assigned (if any) in Preferences > Global Settings > Main Module > Participant Options > Label for "Other Date" field will be used.

DOT Panel

Select the substance panel you would like to use by default in new DOT test result records for this

company.

- A company default DOT panel will override the global default DOT panel
- If this company's default DOT panel is blank, the default DOT panel assigned in the global settings (if assigned) will be used (see Preferences > Global Settings > Main Module > Result Options > DOT Substance Panel to view, remove or change the global default DOT panel)
- To add, edit, or remove a substance panel, choose Substance Panels from the File menu

Non-DOT Panel

Select the substance panel you would like to use by default in new non-DOT test result records for this company.

- A company default non-DOT panel will override the global default non-DOT panel
- If this company's default non-DOT panel is blank, the default non-DOT panel assigned in the global settings (if assigned) will be used (see Preferences >Global Settings > Main Module > Result Options > Non-DOT Substance Panel to view, remove or change the global default non-DOT panel)
- To add, edit, or remove a substance panel, choose Substance Panels from the File menu

MRO Name

Select the MRO name you would like to appear by default in new test result records for participants within this company.

- A company default MRO name will override the global default MRO name
- If the company's default MRO name is blank, the default MRO name assigned in the global settings (if assigned) will be used (see Preferences > Global Settings > Main Module > Result Options > MRO Name to view, remove or change the global default DOT panel)
- The company's default MRO will be overridden by the default MRO name assigned to a home base (if assigned) for results created for participants within that home base
- To add, edit, or remove an MRO name, choose MRO Names from the File menu

Laboratory

Select the lab that you would like to appear by default in new tests records for participants within this company

- A company default lab will override the global default lab.
- If the company's default lab is blank, the default lab assigned in the global settings (if assigned) will be used (see Preferences > Global Settings > Main Module > Result Options > Lab to view, remove or change the global default lab).
- The company's default lab will be overridden by the default lab assigned to a home base (if assigned) for results created for participants within that home base.
- To add, edit, or remove a lab, choose Labs from the File menu, or press the Collection Sites button along the top of the main DrugPak screen

For example, Jack Straw is assigned to home base North within Igloo Trucking company. The default lab for the North home base is Alpha Diagnostics. When a new test result is created for Jack Straw, that test will have Alpha Diagnostics as the lab. If that home base did not have a default lab, then the default lab assigned to Igloo Trucking would be used for Jack Straw's test. If Igloo Trucking did not have a default lab, then the lab assigned in the global settings would be used. If no default lab was assigned in the global settings, then the new test for Jack Straw would have no lab - you would have to choose it manually.

Drug Test Collection Site

Select the drug test collection site that you would like to appear by default in new tests records for participants within this company

- · A company default drug test collection site will override the global default lab
- If the company's default drug test collection site is blank, the default drug test collection site
 assigned in the global settings (if assigned) will be used (see Preferences > Global Settings > Main
 Module > Result Options > Drug Test Collection Site to view, remove or change the global default
 drug test collection site)

- The company's default drug test collection site will be overridden by the default drug test collection site assigned to a home base (if assigned) for drug test results created for participants within that home base
- To add, edit, or remove a collection site, choose Collection Sites from the File menu, or press the Collection Sites button along the top of the main DrugPak screen

As in the example given above for default labs, DrugPak will look for a default drug test collection site in this order: home base > company > global setting.

Alcohol Test Collection Site

Select the alcohol test collection site that you would like to appear by default in new tests records for participants within this company

- A company default alcohol test collection site will override the global default alcohol
- If the company's default alcohol test collection site is blank, the default alcohol test collection site
 assigned in the global settings (if assigned) will be used (see Preferences > Global Settings > Main
 Module > Result Options > Alcohol Test Collection Site to view, remove or change the global default
 alcohol test collection site)
- The company's default alcohol test collection site will be overridden by the default alcohol test collection site assigned to a home base (if assigned) for alcohol test results created for participants within that home base
- To add, edit, or remove a collection site, choose Collection Sites from the File menu, or press the Collection Sites button along the top of the main DrugPak screen

As in the example given above for default labs, DrugPak will look for a default alcohol test collection site in this order: home base > company > global setting.

Custom Fields

There are four optional date files, sort (text) fields, and true/false check boxes.

- By default they are named date 1, date 2, etc. To give them more useful names, go to Preferences > Global Settings > Main Module > Company Options
- · Custom fields are optional

Billing > Basic Info (tab is visible only for licensed users of the DrugPak Billing module)

Billee

The billee's account number and location information is displayed here. (See the billee topic for more information about billees and their settings.) Press the > button to:

- Select (a different) Billee
- Edit Billee (settings)
- · Create a New Billee

Test Price Schedule

By default, the billee will use its own price schedule. If you wish to override the billee's price schedule, you may select a different price schedule here. Press the > button to:

- Select (a different) Price Schedule
- Edit the Price Schedule (except when the Test Price Schedule is set to (Use the Billee's Price Schedule))
- Create New Price Schedule

Custom Rule Set

By default, the billee will use its own (optional) custom rule set. If you wish to override the billee's custom billing rules, you may select a different rule set here. Press the > button to:

- Select (a different) Rule Set
- Edit the Rule Set (except when the Custom Rule Set is set to (No Additional Rules))
- Create a New Rule Set

<u>Billing > Collection Fees</u> (tab is visible only for DrugPak Billing* users)

By default, the collection site charges are determined by the billing profile's Collection Site Charges setting. If you want to set a specific price schedule for tests collected *for* a specific company *at* a specific collection site, press the Add button > choose a collection site > choose a price schedule > press the OK button.

- The "Authorized" box works in combination with a DP Live* setting that limits which collection sites
 can be seen via DP Live (i.e., if both Show Authorized Collection Sites Only box is checked, only
 collection sites with the Authorized box checked will appear in DP Live.) The Show Authorized Coll.
 Sites box must be checked for collection sites to be visible (Preferences > Global Settings > DP Live
 Module > Skin Options > Miscellaneous Options)
- The Simple column refers to whether or not the collection site price schedule has just one set of prices for **all** test types (Simple value will display "Yes"), or price schedules for two or more test types (Simple columns will display "No.")

Billing > Lab Fees (tab is visible only for DrugPak Billing* users)

By default, the lab charges are determined by the billing profile's Lab Charges setting. If you want to set a specific price schedule for results collected *for* a specific company and *tested by* a particular lab, press the Add button > choose a lab > choose a price schedule > press the OK button.

<u>Billing > Misc. Charges and Credits</u> (tab is visible only for DrugPak Billing* users)

This grid will display all miscellaneous charges assigned to this company. You can add, edit or remove miscellaneous charges by pressing the appropriate button.

Billing > Invoice History (tab is visible only for DrugPak Billing* users)

This grid will display invoices (if any) generated for this company. To reprint an invoice, select an invoice, then right-click and press Print Invoice.

Home Bases

This grid displays home bases associated with this company (if any). Double-clicking a home base will open up the home base window and display the selected home base.

Consortium

This grid displays the consortia in which this company is a member. Double-clicking a consortium will open the consortia window and display the selected consortium.

Random Profiles

This grid displays the profiles in which this company is included.

Notes

Use this box to enter any notes about this company.

1.12 File Menu

1.12.1 Test Statuses

Use this feature to add, edit or modify test result statuses.

- Each test status has a single digit alphanumeric code, a category, and a description
- The description appears in the overall test status box, and the status box for each substance of a test
- For reporting purposes, each status is linked to an existing category (unknown, negative,

^{*} Licensed separately

positive, excused, refused, not performed, inconclusive, canceled by MRO)

- Users cannot add or modify categories
- By default all test statuses are available for "All Classes." (The only test classes available by default are alcohol and drug. A future module will allow additional classes.)
- You can change which statuses are available for drug tests and which are available for alcohol tests by unchecking the All Classes box, and manually choosing a test class.

1.12.2 Specimen Types

Use this window to add, modify, and delete specimen types (breath, urine, hair, etc.)

- Each specimen type has a single alphanumeric code and a description
- The description appears in the Sample box of the test result

1.12.3 Consortia

A consortium is a group of companies. Companies can be grouped for different reasons: printing reports, performing random selections, calculating multi-company statistics in the Summary of Drug Testing report, MIS Forms, etc.

- Each consortium can include an unlimited number of companies
- A company may be a member of more than one consortium
- It is possible to include inactive companies in a consortium. These companies will be excluded from any random selections in which that consortium is used.
- You can print a report that includes the member companies and the number of eligible, active, and terminated participants in each consortium and/or company (depending on the report settings)

Sort Lists by Name

Check this box to sort companies by name, rather than company ID.

Consortium Name

- Every consortium must be given a name. This name will be used throughout the system as a unique identifier for this group of companies
- When adding a new record, the words *New Consortium* will appear in the name field. You must enter a name (for the new consortium) to continue.

Comments

This can be used to store general information about the consortium.

Excluded Companies

This list displays the company IDs and company names of all companies not included in the current consortium.

- Double-click a company to move it to the Included Companies list, or select multiple companies, and press the Include [>] button
- · Right-click inside this window to bring up the Find Company window

Include All [>>] button

This button is located under the Excluded Companies list. Click this button [>>] to move all companies to the Included Companies list.

Include [>] button

This button is located under the Excluded Companies list. Click this button [>] to move the selected company or companies to the Included Companies list.

Included Companies list box

This list displays the company IDs and company names of all companies included in the current consortium.

- Double-click a company to move it to the Excluded Companies list, or select multiple companies, and press the Exclude [<] button
- Right-click inside this window to bring up the Find Company window

Exclude All [<<] Companies button

This button is located under the Included Companies list. Click this button [<<] to move all companies to the Excluded Companies list.

Exclude [<] Company button

This button is located under the Included Companies list. Click this button [<] to move the selected company or companies to the Excluded Companies list.

1.12.4 Substance Panels

The substance panels window allows you to manage groups of substances for use in test results.

- Each panel is given a name, which can be selected from a list on the results window
- Up to 14 substances can be entered in each panel
- Existing results are unaffected by changes to a substance panels
- The substance panel is not stored with the test result record (i.e., after you select a panel and the substances are filled out, the result record does not remember which panel was used to obtain the list of substances)
- Substances must first exist in DrugPak to be chosen in a panel. If the substances does not
 exist, create it in the codes window.

When a new result record is created, the DrugPak will look for a default substance panel, and use it for new test results in the following order: random selection profile default panels (for DrugPak-generated random tests) > global result default panels (Preferences > Global Settings > Main Module > Result Options) > company default panels (Participant/Results tab of Companies window). Default DOT panels and default non-DOT panels are specified separately.

Panel Name

Enter the name for the panel. This is the name which will appear in the various panel lists throughout the software.

Substances in Panel

Each panel can hold up to 14 substance codes. Choose the substances from the drop-down menus.

Test Classes

By default, a new substance panel will be available for all test classes ("All Classes" box will be checked). To make a substance panel available for only certain test classes, uncheck the All Classes box, and choose individual test classes. This is meant primarily for users of the Order Entry module* which allows test classes in addition to drug and alcohol.

^{*} Licensed separately

1.12.5 Follow-Up Tests

The Follow-Up Test Schedules function allows you to generate a schedule of follow-up tests for a participant.

- Schedule tests one day at a time, or automatically schedule tests in a range of dates.
- Print out lists of scheduled tests, and personalized notification letters for a range of participants and dates
- This feature does not automatically create test result records, nor does it confirm that the test records have been entered

There are two parts to this feature: generating a schedule, and printing notification letters and/or test schedules

- 1) Generating a test schedule
 - a) Choose the participant for whom the follow-up tests need to be scheduled. You can choose the name from the drop-down menu, or hit the Find button and select the participant there. (The names displayed are the participants in the current company. To generate a follow-up test schedule for a participant in a different company, open the company window and select the desired company, then re-open the follow-up test schedule window.)
 - b) Select the beginning and ending dates for possible tests (i.e., tests will be scheduled between those two dates)
 - c) Choose the number of tests that need to be performed between the starting date and ending date
 - d) Choose to schedule only drug tests, only alcohol tests, or both drug and alcohol tests
 - e) Optionally choose to schedule the tests randomly between the starting and ending dates by checking the Random Scheduling box (if it is unchecked, the tests will be spread evenly between starting and ending dates.)
 - f) Press the Generate Schedule button. This will generate the schedule and take you to the Print Schedule/Notifications tab.
- 2) Print Schedule and/or Notification Letters
 - a) By default the participant name and test in the schedule grid will be the participant for whom tests were scheduled in step 1. If you want to print schedules and notification letters for a different participant, choose the correct name from the drop-down menu, or choose the participant using the Find button.
 - b) To print a notification letter, select a test from the schedule grid on the left side and press the Print Notification Letter button.
 - c) The Letter Date will default to today's date, but you may change it.
 - d) The drug collection and alcohol collection site will be populated if there was a default collection site assigned for the selected participant's home base, or company. To select a different collection site, right-click the collection site field, or press F2 in the collection site field.
 - e) To print a follow-up test schedule, choose the report scope: current participant (as listed in the Participant field at the top right), current company, all companies, or consortium. When consortium is chosen, a new menu will appear that will allow you to choose a consortium.
 - f) The report range will determine which follow-up tests will be included in the schedule (based on scheduled date).

1.12.6 Initial Positives

The initial positives file is a company-specific file which is used to store information on Initial Positives for the current company.

You may wish to enter this information as you receive test results, or you may

"batch-enter" it based upon periodic reports received from your various laboratories

• Initial Positives for drugs are stored separately from those for alcohol

Find Closest Date

Enter a date in this field to locate the closest initial positives record.

Initial Positives data grid

The data grid displays two columns: Date, and (number of) Initial Positives. Each field must be completed in order to post a record. At the bottom of the grid is a set of tabs which determines whether the grid is displaying figures for Drugs or Alcohol. A dark pointer (>) on the left of the grid indicates which record is the database's current record. You may click directly on a cell and type in the grid to modify the data contained therein.

1.12.7 MRO Names

This window allows you to add, delete, and edit MRO names. You can also assign a signature image to an MRO name.

- To add an MRO name to DrugPak, press the plus (+) button, enter the name, and press the check box button
- If you wish to add an image of an MRO's signature (to appear on result letters), select the
 appropriate MRO name from the list, press the Select Signature Image button, and select
 the correct image. Be careful that dimensions of the signature image file is not much larger
 than the image itself. Consult your image manipulation documentation or IT staff regarding
 image/canvas size.
- If you wish to remove a signature image from an MRO name, select the appropriate MRO name from the grid, and press the Clear Signature Image button.

1.12.8 Collector Names

This window allows you to add, delete, and edit collector names.

- The collector names are associated with a collection site
- To add, delete, or edit a collector name, you must first select the appropriate collection site
- A test result's collection site will determine which collector names (if any) will be available in the results window collector names menu

1.12.9 Task List

This menu option is available to DrugPak Informer* users only, and will open the task list. Please see the task list topic for more information.

* DrugPak Informer is licensed separately.

1.12.10 Security Profiles

This menu option is available to DrugPak Live* users only, and will open the security profiles window. See the Security Profiles topic for more information.

* DrugPak Live is licensed separately.

1.12.11 Users

The users file contains a list of all DrugPak users and their security level. This is where the master use can add, remove and modify DrugPak users, including adding or changing users' passwords.

Important note about the MASTER user:

- MASTER is a permanent user ID for which special rights are reserved
- It is not advisable to use the MASTER user ID for daily operations the master user should create user names and have DrugPak users log in with their own names.
- Scanlon Associates has no way of knowing your master user's password please keep it in a safe and secure place
- Only the MASTER user may perform the following tasks:
 - o Browse and modify DrugPak users' security settings and passwords
 - Modify Global Settings
 - o Delete a company

User Name

Enter the user name as it will be entered at the DrugPak login window.

- After a user logs on, the user name is displayed on the main window's Status Bar
- A user name may have up to eight alphanumeric characters, and can have no spaces

Full Name

Enter the user's full name.

Access Results Records

Uncheck this box to deny a DrugPak user access to test results.

Access Billing Features

Uncheck this box to deny a DrugPak user access to DrugPak Billing features.

Access MRO Features

Uncheck this box to deny a DrugPak users access to the MRO Management module.

Access Random Selection Features

Uncheck this box to deny a DrugPak user access features related to random selections (this includes random selection audit trails, random program statistics.) Users with no random selection access cannot modify any property of a participant record that affects the participant's eligibility for random selections, including terminated status, include in randoms status, DOT administration, home base, occupation, and pool group.

Password

The Master user can add, remove and modify passwords of any user (including the master user's password).

- The master password is initially blank
- Click the Password button open the Change Password window
- To change your password, enter the password previous password (if any) in the Old Password field, and enter your desired new password in the New Password and Verify New Password fields. Click

the OK button to accept the change.

1.13 Reports Menu

1.13.1 Analysis

1.13.1.1 Activity Summary

The Activity Summary prints a test count summary for each company in your system. This may be particularly useful for preparing monthly client billings. For each company, the report includes the number of participants (active and terminated), the number of tests (subtotaled by test type), and the number of positive results for each test type.

Use global report default (this check box is available in nearly every report setting)

Use this option to use the settings designated in the global report defaults for this report (found in Reports > Global Report Defaults > {Report Category} > {Report Name}).

Report Caption (setting visible only for reports that have been assigned to contacts)

This can be set to anything you like - like Bob's activity summary or Jane's activity report. When you look at a contact's list of reports, the official DrugPak name will appear next to the report caption so you know exactly which report it is.

Task Options (setting visible only for users with DP Informer installed and only for reports that have been assigned to contacts)

By default, the contact's task generation options will be used. You can optionally override the contact's task options here by unchecking the "Use default task generation options from contact" check box. (See Contact Task Options for more info.)

Report Frequency (setting visible only for reports that have been assigned to contacts)

Print on-demand only: check this box if you do **not** want **this report** for **this contact** to be created when generating reports.

Allow generation only once every: when allowing generation (i.e., the "Print on-demand only" box is unchecked), you can set the frequency that this report can be generated.

Don't allow generation again until at least: When using the report frequency (above), you can set the *earliest* date and time that **this report** for **this contact** can be generated.

Use Custom Report

Check this box to use a custom report. If you are using a custom report, you must select the file using the Custom Report File Name prompt (directly below this prompt).

Custom Report File Name (setting visible when Use Custom Report box is checked)

Use this item to choose the custom report. The custom report must reside in the ...scanlon\dp50\reports\custom folder in order to appear when selecting a custom report.

Report Destination

Use this setting to determine where you want the report to go. Options are: Screen, Printer, File, E-mail, and Fax. You can use any or all of these destinations. You must choose at least one destination. *E-mail and fax destinations are available only for users who have DP Informer installed*,

and only for reports that have been assigned to a contact.

Subject Line (setting visible when E-mail is chosen as a destination)

This text will be used for the subject line of the e-mail message containing this report. If this is left blank, the subject line from Communication Settings will be used.

Printer (setting visible only when Printer is chosen as destination)

Choose from either the default DrugPak printer (chosen through Reports > Printer Setup), or a specific printer.

Export Format (setting visible when File is chosen as a destination)

Use this setting to determine the format of the file to be created from this report. Formats include Adobe Acrobat PDF, Microsoft Word, ASCII, HTML, Excel, etc.

File Name (setting visible when File is chosen as destination)

Create a file name and set a location for the file that will be created from this report. A file name is required if you set the destination to a file.

Company Scope

Use this setting to control which company/companies or consortia to include in the report. You can choose to print the report for a single company, for a consortium, for all companies, or for the current company (current company setting is not available for contact-specific reports). When printing a contact-specific report, this setting will be overridden by the location(s) that the contact is linked to (e.g., if you choose All Companies as a company scope, but the contact is linked to only Alpha Trucking, the records in this report will be only those from Alpha Trucking.)

Company (setting visible when company is chosen in the Company Scope setting)

Use the Find button to select the desired company.

Consortium (setting visible when consortium is chosen in Company Scope setting)

Use the Find button to select the desired consortium.

Date Range

Include all dates

Use this check box to include all dates in this report. Date range settings and automatic date range settings will be overridden.

Date range

Enter a date range to control which result records will be included in the report. Results with collection dates falling outside of this range will not be included in the report.

Use automatic date range (only available for contact-specific reports)

Check this box to set an automatic date range based on the current date: (such as current date plus 7 days to current date plus 21 days)

Include Inactive Companies (setting available when either All Companies or Consortium is chosen as Company Scope)

Check this box to include inactive companies.

Substances

Use this setting to choose to include drug results, alcohol results, or both drug and alcohol results.

DOT Options

Use this setting to include only DOT results, only non-DOT results, or both DOT and non-DOT results.

Categorize Canceled Tests

Use this setting to specify how to categorize canceled tests on the report. The available options are to include canceled tests under the appropriate test type totals, to include canceled tests under the "other" totals, or to exclude canceled tests.

Column 1/2/3/4/5 Test Types

Choose between one and five test types to be included in report. At least one test type must be chosen.

Test Statuses

Choose which test status(es) to be included in report.

Contact Filters (setting visible only for reports that have been assigned to contacts)

Click to view filters applied to this contact (if any) that will affect the records that will appear on this report.

1.13.1.2 Collection Site Usage Report

This report shows the number of tests, and (optionally) the details of each test, done at each collection site.

Use global report default (this check box is available in nearly every report setting)

Use this option to use the settings designated in the global report defaults for this report (found in Reports > Global Report Defaults > {Report Category} > {Report Name}).

Report Caption (setting visible only for reports that have been assigned to contacts)

This can be set to anything you like - like Bob's Collection Site Report. When you look at a contact's list of reports, the official DrugPak name will appear next to the report caption so you know exactly which report it is.

Task Options (setting visible only for users with DP Informer installed and only for reports that have been assigned to contacts)

By default, the contact's task generation options will be used. You can optionally override the contact's task options here by unchecking the "Use default task generation options from contact" check box. (See Contact Task Options for more info.)

Report Frequency (setting visible only for reports that have been assigned to contacts)

Print on-demand only: check this box if you do **not** want **this report** for **this contact** to be created when generating reports.

Allow generation only once every: when allowing generation (i.e., the "Print on-demand only" box is unchecked), you can set the frequency that this report can be generated.

Don't allow generation again until at least: When using the report frequency (above), you can set the *earliest* date and time that **this report** for **this contact** can be generated.

Report Destination

Use this setting to determine where you want the report to go. Options are: Screen, Printer, File, E-mail, and Fax. You can use any or all of these destinations. You must choose at least one destination. *E-mail and fax destinations are available only for users who have DP Informer installed,*

and only for reports that have been assigned to a contact.

Subject Line (setting visible when E-mail is chosen as a destination)

This text will be used for the subject line of the e-mail message containing this report. If this is left blank, the subject line from Communication Settings will be used.

Printer (setting visible only when Printer is chosen as destination)

Choose from either the default DrugPak printer (chosen through Reports > Printer Setup), or a specific printer.

Export Format (setting visible when File is chosen as a destination)

Use this setting to determine the format of the file to be created from this report. Formats include Adobe Acrobat PDF, Microsoft Word, ASCII, HTML, Excel, etc.

File Name (setting visible when File is chosen as destination)

Create a file name and set a location for the file that will be created from this report. A file name is required if you set the destination to a file.

Custom Filter

Optional filter(s) can be entered here to limit the scope of the report. This setting uses the standard add filter function.

Report Style

Choose from normal (more detail), short (less detail) or custom.

Custom Report Name (setting visible when Custom Report option is chosen as Report Style)

Use this item to choose the custom report. The custom report must reside in the ...scanlon\dp50\reports\custom folder in order to appear when selecting a custom report.

Company Scope

Use this setting to control which company/companies or consortia to include in the report. You can choose to print the report for a single company, for a consortium, for all companies, or for the current company (current company setting is not available for contact-specific reports). When printing a contact-specific report, this setting will be overridden by the location(s) that the contact is linked to (e.g., if you choose All Companies as a company scope, but the contact is linked to only Alpha Trucking, the records in this report will be only those from Alpha Trucking.)

Company (setting visible when company is chosen in the Company Scope setting)

Use the Find button to select the desired company.

Consortium (setting visible when consortium is chosen in Company Scope setting)

Use the Find button to select the desired consortium.

Include Inactive Companies (setting available when either All Companies or Consortium is chosen as Company Scope)

Check this box to include inactive companies.

Group by company (setting available when either All Companies or Consortium is chosen as Company Scope)

Check this box to group collection sites details by company.

Date Range

Include all dates

Use this check box to include all dates in this report. Date range settings and automatic date range settings will be overridden.

Date range

Enter a date range to control which result records will be included in the report. Results with collection dates falling outside of this range will not be included in the report.

Use automatic date range (only available for contact-specific reports)

Check this box to set an automatic date range based on the current date: (such as current date plus 7 days to current date plus 21 days)

DOT Options

Use this setting to include only DOT results, only non-DOT results, or both DOT and non-DOT results.

Substances

Use this setting to choose to include drug results, alcohol results, or both drug and alcohol results.

Hide Result (setting visible when Normal is chosen as the Report Style)

Check this box to omit the result status (negative, positive, etc.) from the report.

Grand Totals Only (setting visible when Short Form is chosen as Report Style)

Check this box to report only grand totals (no break-down by test type) for each collection site.

Contact Filters (setting visible only for reports that have been assigned to contacts)

Click to view filters applied to this contact (if any) that will affect the records that will appear on this report.

1.13.1.3 DOT MIS Form

The various administrations of the U.S. Department of Transportation require employers under their jurisdiction to provide quarterly and/or annual statistics regarding their drug and alcohol testing program. DrugPak's MIS reports are specially designed to meet the reporting requirements.

DrugPak can print forms which are virtually identical to the forms provided by the DOT administrations. Some minor formatting differences distinguish DrugPak's forms from the official forms. Some information requested by the forms may not exist in DrugPak; these fields will be left blank. Otherwise, the layout and content of the reports are identical to and can serve as substitutes for the standard form.

When processing your result records for these reports, DrugPak will include only DOT results with the correct DOT administration and correct occupation.

Use global report default (this check box is available in nearly every report setting)

Use this option to use the settings designated in the global report defaults for this report (found in Reports > Global Report Defaults > {Report Category} > {Report Name}).

Report Caption (setting visible only for reports that have been assigned to contacts)

This can be set to anything you like - like Bob's MIS Report. When you look at a contact's list of reports, the official DrugPak name will appear next to the report caption so you know exactly which

report it is.

Task Options (setting visible only for users with DP Informer installed and only for reports that have been assigned to contacts)

By default, the contact's task generation options will be used. You can optionally override the contact's task options here by unchecking the "Use default task generation options from contact" check box. (See Contact Task Options for more info.)

Use Custom Report

Check this box to use a custom report. If you are using a custom report, you must select the file using the Custom Report File Name prompt (directly below this prompt).

Custom Report File Name (setting visible when Use Custom Report box is checked)

Use this item to choose the custom report. The custom report must reside in the ...scanlon\dp50\reports\custom folder in order to appear when selecting a custom report.

Report Destination

Use this setting to determine where you want the report to go. Options are: Screen, Printer, File, E-mail, and Fax. You can use any or all of these destinations. You must choose at least one destination. *E-mail and fax destinations are available only for users who have DP Informer installed, and only for reports that have been assigned to a contact.*

Subject Line (setting visible when E-mail is chosen as a destination)

This text will be used for the subject line of the e-mail message containing this report. If this is left blank, the subject line from Communication Settings will be used.

Printer (setting visible only when Printer is chosen as destination)

Choose from either the default DrugPak printer (chosen through Reports > Printer Setup), or a specific printer.

Export Format (setting visible when File is chosen as a destination)

Use this setting to determine the format of the file to be created from this report. Formats include Adobe Acrobat PDF, Microsoft Word, ASCII, HTML, Excel, etc.

File Name (setting visible when File is chosen as destination)

Create a file name and set a location for the file that will be created from this report. A file name is required if you set the destination to a file.

DOT Administrations

Choose at least one DOT administration.

- Any or all administrations can be chosen
- The MIS report will be generated for those administrations included in results and participants for the chosen company or consortium

Company Scope

Use this setting to control which company/companies or consortia to include in the report. You can choose to print the report for a single company, for a consortium, for all companies, or for the current company (current company setting is not available for contact-specific reports). When printing a contact-specific report, this setting will be overridden by the location(s) that the contact is linked to (e.g., if you choose All Companies as a company scope, but the contact is linked to only Alpha Trucking, the records in this report will be only those from Alpha Trucking.)

Company (setting visible when company is chosen in the Company Scope setting)

Use the Find button to select the desired company.

Consortium (setting visible when consortium is chosen in Company Scope setting)

Use the Find button to select the desired consortium.

Select tests for this report based on

This option is important in the circumstances where a result is collected *inside* the date range, but verified *outside* the date range; or conversely, collected *outside* the date range, but verified *inside* the date range. For example, assuming the date range is set to 01/01/2006 to 12/31/2006 and there are tests collected in 2006, *but verified after 2006*, selecting MRO Verification date will *exclude* those tests. Similarly, tests that were collected *prior* to 2006, but verified *within* 2006 will be *included* in the MIS report.

MRO Verification Date

This option will include tests with MRO Verification dates within the date range specified above in the Start Date and End Date.

Collection Date

This option will include tests with a Collection Date within the date range specified above in the Start Date and End Date.

Date Range

Date range

Enter a date range to control which result records will be included in the report. Results with collection dates falling outside of this range will not be included in the report.

Use automatic date range (only available for contact-specific reports)

Check this box to set an automatic date range based on the current date: (such as current date plus 7 days to current date plus 21 days)

Grouping

Use this list box to control how records are grouped on the report. The options include:

No Grouping

Select this option when you want statistics to be summed together for an entire consortium, on a single report.

Group by Company

This is the most common grouping option. Each company's results will appear on a separate report.

Group by Home Base

Select this option if you would like each home base's results to be grouped on a separate report. A single print job will be generated for each company, but the print job will be broken into subreports. Results for participants not belonging to any home base will be grouped together on the main company's report.

Group by Participant

Select this option to display each participant on their own report

Use participant's home base (setting visible only when Group by Home Base is chosen in the Grouping setting)

Check this box to disregard the home base assigned to a result - the participant's *current* home base will be used.

C/TPA Name (if applicable)

Enter the name of the C/TPA to appear at the top of the report.

C/TPA Phone (if applicable)

Enter the phone number of the C/TPA to appear at the top of the report.

Preparer Name (if applicable)

Enter the preparer's name (if different).

Preparer Phone (if applicable)

Enter the preparer's phone number (if different).

Sort by

When generating a multi-page report (multiple companies, home bases, or participants) this option causes pages to be sorted by code (company ID, home base code or participant ID) or by name.

Do not calculate Sections II(A) and II(C) totals

Check this box to calculate the totals for sections for II(A) and II(C) manually. These sections will be left blank on the report.

Restrict RND tests to batches included in Section II

Check this box to include an RND test in section III or IV of the report only if its batch number was used in calculating the totals in section II(A) and II(C). Uncheck this check box to include all RND tests in section III.

Average each random pool separately

Check this box if each random selection random selection profile represents a different "sub-pool" of participants (i.e., different participants were eligible in each profile.) *Incorrectly turning this check box on will result in "Covered Employees" being calculated too high.* Uncheck this box if random selection profiles should be ignored when calculating the average pool size (i.e., the same participants were eligible in all pools regardless of the random selection profile). *Incorrectly turning this on will result in "Covered Employees" being calculated too low.*

Build consortium based on pool history (setting visible only when consortium is chosen in the company scope)

Check this box if there are companies that have left the selected consortium during the reporting period which you want to include on the report. Uncheck this box if you want to print the report using *only companies currently in the consortium*.

Strict consortium pool-size averaging (setting visible only when consortium is chosen in the company scope)

Check this box if you want the totals in section II(A) and II(C) to include **only** random pools created for this consortium specifically. Uncheck box if you want to include **all** pools created for any company in the consortium.

Ignore single-company randoms (setting visible only when consortium is chosen in the company scope)

Check this box if you want the totals in section II(A) and II(C) to include **only** random pools created for multiple companies. Uncheck this box if you want the totals to include **all pools created for any company in the consortium**. The strict consortium pool-size averaging check box above automatically includes this option.

Additional Participant Filter

Optionally enter a filter to define which participants will be eligible for reporting. If a participant record does not meet this filter condition, then that participant will not be tallied into the "Covered Employees" section of the MIS report. Furthermore, none of that participant's results will be included in the MIS report. This setting uses the standard add filter function.

Additional Result Filter

Optionally enter a filter to define which results will be eligible for reporting. If a result record does not meet this filter condition, it will not appear on the MIS report. This setting uses the standard add filter function.

Contact Filters (setting visible only for reports that have been assigned to contacts)

Click to view filters applied to this contact (if any) that will affect the records that will appear on this report.

1.13.1.4 DP Live Activity Log

Use global report default (this check box is available in nearly every report setting)

Use this option to use the settings designated in the global report defaults for this report (found in Reports > Global Report Defaults > {Report Category} > {Report Name}).

Report Caption (setting visible only for reports that have been assigned to contacts)

This can be set to anything you like - like Bob's DP Live Activity Report. When you look at a contact's list of reports, the official DrugPak name will appear next to the report caption so you know exactly which report it is.

Task Options (setting visible only for users with DP Informer installed and only for reports that have been assigned to contacts)

By default, the contact's task generation options will be used. You can optionally override the contact's task options here by unchecking the "Use default task generation options from contact" check box. (See Contact Task Options for more info.)

Report Frequency (setting visible only for reports that have been assigned to contacts)

Print on-demand only: check this box if you do **not** want **this report** for **this contact** to be created when generating reports.

Allow generation only once every: when allowing generation (i.e., the "Print on-demand only" box is unchecked), you can set the frequency that this report can be generated.

Don't allow generation again until at least: When using the report frequency (above), you can set the *earliest* date and time that **this report** for **this contact** can be generated.

Use Custom Report

Check this box to use a custom report. If you are using a custom report, you must select the file using the Custom Report File Name prompt (directly below this prompt).

Custom Report File Name (setting visible when Use Custom Report box is checked)

Use this item to choose the custom report. The custom report must reside in the ...scanlon\dp50\reports\custom folder in order to appear when selecting a custom report.

Report Destination

Use this setting to determine where you want the report to go. Options are: Screen, Printer, File,

E-mail, and Fax. You can use any or all of these destinations. You must choose at least one destination. *E-mail and fax destinations are available only for users who have DP Informer installed, and only for reports that have been assigned to a contact.*

Subject Line (setting visible when E-mail is chosen as a destination)

This text will be used for the subject line of the e-mail message containing this report. If this is left blank, the subject line from Communication Settings will be used.

Printer (setting visible only when Printer is chosen as destination)

Choose from either the default DrugPak printer (chosen through Reports > Printer Setup), or a specific printer.

Export Format (setting visible when File is chosen as a destination)

Use this setting to determine the format of the file to be created from this report. Formats include Adobe Acrobat PDF, Microsoft Word, ASCII, HTML, Excel, etc.

File Name (setting visible when File is chosen as destination)

Create a file name and set a location for the file that will be created from this report. A file name is required if you set the destination to a file.

Custom Filter

Optional filter(s) can be entered here to limit the scope of the report. This setting uses the standard add filter function.

Contact Filters (setting visible only for reports that have been assigned to contacts)

Click to view filters applied to this contact (if any) that will affect the records that will appear on this report.

1.13.1.5 Lab Usage Report

This report shows the number of tests, and (optionally) the details of each test, analyzed at each lab.

Use global report default (this check box is available in nearly every report setting)

Use this option to use the settings designated in the global report defaults for this report (found in Reports > Global Report Defaults > {Report Category} > {Report Name}).

Report Caption (setting visible only for reports that have been assigned to contacts)

This can be set to anything you like - like Bob's Lab Usage Report. When you look at a contact's list of reports, the official DrugPak name will appear next to the report caption so you know exactly which report it is.

Task Options (setting visible only for users with DP Informer installed and only for reports that have been assigned to contacts)

By default, the contact's task generation options will be used. You can optionally override the contact's task options here by unchecking the "Use default task generation options from contact" check box. (See Contact Task Options for more info.)

Report Frequency (setting visible only for reports that have been assigned to contacts)

Print on-demand only: check this box if you do **not** want **this report** for **this contact** to be created when generating reports.

Allow generation only once every: when allowing generation (i.e., the "Print on-demand only" box is unchecked), you can set the frequency that this report can be generated.

Don't allow generation again until at least: When using the report frequency (above), you can set the *earliest* date and time that **this report** for **this contact** can be generated.

Report Destination

Use this setting to determine where you want the report to go. Options are: Screen, Printer, File, E-mail, and Fax. You can use any or all of these destinations. You must choose at least one destination. *E-mail and fax destinations are available only for users who have DP Informer installed, and only for reports that have been assigned to a contact.*

Subject Line (setting visible when E-mail is chosen as a destination)

This text will be used for the subject line of the e-mail message containing this report. If this is left blank, the subject line from Communication Settings will be used.

Printer (setting visible only when Printer is chosen as destination)

Choose from either the default DrugPak printer (chosen through Reports > Printer Setup), or a specific printer.

Export Format (setting visible when File is chosen as a destination)

Use this setting to determine the format of the file to be created from this report. Formats include Adobe Acrobat PDF, Microsoft Word, ASCII, HTML, Excel, etc.

File Name (setting visible when File is chosen as destination)

Create a file name and set a location for the file that will be created from this report. A file name is required if you set the destination to a file.

Custom Filter

Optional filter(s) can be entered here to limit the scope of the report. This setting uses the standard add filter function.

Company Scope

Use this setting to control which company/companies or consortia to include in the report. You can choose to print the report for a single company, for a consortium, for all companies, or for the current company (current company setting is not available for contact-specific reports). When printing a contact-specific report, this setting will be overridden by the location(s) that the contact is linked to (e.g., if you choose All Companies as a company scope, but the contact is linked to only Alpha Trucking, the records in this report will be only those from Alpha Trucking.)

Company (setting visible when company is chosen in the Company Scope setting)

Use the Find button to select the desired company.

Consortium (setting visible when consortium is chosen in Company Scope setting)

Use the Find button to select the desired consortium.

Include Inactive Companies (setting available when either All Companies or Consortium is chosen

as Company Scope)

Check this box to include inactive companies.

Group by company (setting available when either All Companies or Consortium is chosen as Company Scope)

Check this box to group collection sites details by company.

Date Range

Include all dates

Use this check box to include all dates in this report. Date range settings and automatic date range settings will be overridden.

Date range

Enter a date range to control which result records will be included in the report. Results with collection dates falling outside of this range will not be included in the report.

Use automatic date range (only available for contact-specific reports)

Check this box to set an automatic date range based on the current date: (such as current date plus 7 days to current date plus 21 days)

DOT Options

Use this setting to include only DOT results, only non-DOT results, or both DOT and non-DOT results.

Report Style

Choose from normal (more detail), short (less detail) or custom.

Custom Report Name (setting visible when Custom Report option is chosen as Report Style)

Use this item to choose the custom report. The custom report must reside in the ...scanlon\dp50\reports\custom folder in order to appear when selecting a custom report.

Substances

Use this setting to choose to include drug results, alcohol results, or both drug and alcohol results.

Hide Result (setting visible when Normal is chosen as the Report Style)

Check this box to omit the result status (negative, positive, etc.) from the report.

Grand Totals Only (setting visible when Short Form is chosen as Report Style)

Check this box to report only grand totals (no break-down by test type) for each collection site.

Contact Filters (setting visible only for reports that have been assigned to contacts)

Click to view filters applied to this contact (if any) that will affect the records that will appear on this report.

1.13.1.6 Profiles Due for Random Selection

This reports displays random selection profiles that are due within a selected date range. If the date in a profile's "...next random selection will be due on..." falls within the date range set for the report, the profile is "due."

Use global report default (this check box is available in nearly every report setting)

Use this option to use the settings designated in the global report defaults for this report (found in Reports > Global Report Defaults > {Report Category} > {Report Name}).

Report Caption (setting visible only for reports that have been assigned to contacts)

This can be set to anything you like - like Bob's Upcoming Random Profile Due Dates. When you look at a contact's list of reports, the official DrugPak name will appear next to the report caption so you know exactly which report it is.

Task Options (setting visible only for users with DP Informer installed and only for reports that have been assigned to contacts)

By default, the contact's task generation options will be used. You can optionally override the contact's task options here by unchecking the "Use default task generation options from contact" check box. (See Contact Task Options for more info.)

Report Frequency (setting visible only for reports that have been assigned to contacts)

Print on-demand only: check this box if you do **not** want **this report** for **this contact** to be created when generating reports.

Allow generation only once every: when allowing generation (i.e., the "Print on-demand only" box is unchecked), you can set the frequency that this report can be generated.

Don't allow generation again until at least: When using the report frequency (above), you can set the *earliest* date and time that **this report** for **this contact** can be generated.

Use Custom Report

Check this box to use a custom report. If you are using a custom report, you must select the file using the Custom Report File Name prompt (directly below this prompt).

Custom Report File Name (setting visible when Use Custom Report box is checked)

Use this item to choose the custom report. The custom report must reside in the ...scanlon\dp50\reports\custom folder in order to appear when selecting a custom report.

Report Destination

Use this setting to determine where you want the report to go. Options are: Screen, Printer, File, E-mail, and Fax. You can use any or all of these destinations. You must choose at least one destination. *E-mail and fax destinations are available only for users who have DP Informer installed, and only for reports that have been assigned to a contact.*

Subject Line (setting visible when E-mail is chosen as a destination)

This text will be used for the subject line of the e-mail message containing this report. If this is left blank, the subject line from Communication Settings will be used.

Printer (setting visible only when Printer is chosen as destination)

Choose from either the default DrugPak printer (chosen through Reports > Printer Setup), or a specific printer.

Export Format (setting visible when File is chosen as a destination)

Use this setting to determine the format of the file to be created from this report. Formats include Adobe Acrobat PDF, Microsoft Word, ASCII, HTML, Excel, etc.

File Name (setting visible when File is chosen as destination)

Create a file name and set a location for the file that will be created from this report. A file name is required if you set the destination to a file.

Custom Filter

Optional filter(s) can be entered here to limit the scope of the report. This setting uses the standard add filter function.

Due Date Range

Include all dates

Use this check box to include all dates in this report. Date range settings and automatic date range settings will be overridden.

Date range

Enter a date range to control which result records will be included in the report. Results with collection dates falling outside of this range will not be included in the report.

Use automatic date range (only available for contact-specific reports)

Check this box to set an automatic date range based on the current date: (such as current date plus 7 days to current date plus 21 days)

Sort by

Choose to sort report by profile name or due date.

Contact Filters (setting visible only for reports that have been assigned to contacts)

Click to view filters applied to this contact (if any) that will affect the records that will appear on this report.

1.13.2 File Lists

1.13.2.1 Codes List

This report will display a list of occupations, pool groups, dispositions, test types or substances.

Use global report default (this check box is available in nearly every report setting)

Use this option to use the settings designated in the global report defaults for this report (found in Reports > Global Report Defaults > {Report Category} > {Report Name}).

Report Caption (setting visible only for reports that have been assigned to contacts)

This can be set to anything you like - like Bob's Test Type List. When you look at a contact's list of reports, the official DrugPak name will appear next to the report caption so you know exactly which report it is.

Task Options (setting visible only for users with DP Informer installed and only for reports that have been assigned to contacts)

By default, the contact's task generation options will be used. You can optionally override the contact's task options here by unchecking the "Use default task generation options from contact" check box. (See Contact Task Options for more info.)

Report Frequency (setting visible only for reports that have been assigned to contacts)

Print on-demand only: check this box if you do not want this report for this contact to be

created when generating reports.

Allow generation only once every: when allowing generation (i.e., the "Print on-demand only" box is unchecked), you can set the frequency that this report can be generated.

Don't allow generation again until at least: When using the report frequency (above), you can set the *earliest* date and time that **this report** for **this contact** can be generated.

Report Destination

Use this setting to determine where you want the report to go. Options are: Screen, Printer, File, E-mail, and Fax. You can use any or all of these destinations. You must choose at least one destination. *E-mail and fax destinations are available only for users who have DP Informer installed, and only for reports that have been assigned to a contact.*

Subject Line (setting visible when E-mail is chosen as a destination)

This text will be used for the subject line of the e-mail message containing this report. If this is left blank, the subject line from Communication Settings will be used.

Printer (setting visible only when Printer is chosen as destination)

Choose from either the default DrugPak printer (chosen through Reports > Printer Setup), or a specific printer.

Export Format (setting visible when File is chosen as a destination)

Use this setting to determine the format of the file to be created from this report. Formats include Adobe Acrobat PDF, Microsoft Word, ASCII, HTML, Excel, etc.

File Name (setting visible when File is chosen as destination)

Create a file name and set a location for the file that will be created from this report. A file name is required if you set the destination to a file.

Custom Filter

Optional filter(s) can be entered here to limit the scope of the report. This setting uses the standard add filter function.

Code Types

Choose which type of code to include on this report. The available options are Occupations, Pool Groups, Dispositions, Substances, and Test Types.

Occupation/Pool Group/Disposition/Substance/Test Type Codes (this setting is dependent on the code type chosen above)

You may select a range of codes by using the Find button, or include all codes (of that particular code type).

Sort Order

You may choose to sort by code or by description.

Contact Filters (setting visible only for reports that have been assigned to contacts)

Click to view filters applied to this contact (if any) that will affect the records that will appear on this report.

1.13.2.2 Collection Site List

Use global report default (this check box is available in nearly every report setting)

Use this option to use the settings designated in the global report defaults for this report (found in

Reports > Global Report Defaults > {Report Category} > {Report Name}).

Report Caption (setting visible only for reports that have been assigned to contacts)

This can be set to anything you like - like Bob's Collection Site List. When you look at a contact's list of reports, the official DrugPak name will appear next to the report caption so you know exactly which report it is.

Task Options (setting visible only for users with DP Informer installed and only for reports that have been assigned to contacts)

By default, the contact's task generation options will be used. You can optionally override the contact's task options here by unchecking the "Use default task generation options from contact" check box. (See Contact Task Options for more info.)

Report Frequency (setting visible only for reports that have been assigned to contacts)

Print on-demand only: check this box if you do **not** want **this report** for **this contact** to be created when generating reports.

Allow generation only once every: when allowing generation (i.e., the "Print on-demand only" box is unchecked), you can set the frequency that this report can be generated.

Don't allow generation again until at least: When using the report frequency (above), you can set the *earliest* date and time that **this report** for **this contact** can be generated.

Report Destination

Use this setting to determine where you want the report to go. Options are: Screen, Printer, File, E-mail, and Fax. You can use any or all of these destinations. You must choose at least one destination. *E-mail and fax destinations are available only for users who have DP Informer installed, and only for reports that have been assigned to a contact.*

Subject Line (setting visible when E-mail is chosen as a destination)

This text will be used for the subject line of the e-mail message containing this report. If this is left blank, the subject line from Communication Settings will be used.

Printer (setting visible only when Printer is chosen as destination)

Choose from either the default DrugPak printer (chosen through Reports > Printer Setup), or a specific printer.

Export Format (setting visible when File is chosen as a destination)

Use this setting to determine the format of the file to be created from this report. Formats include Adobe Acrobat PDF, Microsoft Word, ASCII, HTML, Excel, etc.

File Name (setting visible when File is chosen as destination)

Create a file name and set a location for the file that will be created from this report. A file name is required if you set the destination to a file.

Custom Filter

Optional filter(s) can be entered here to limit the scope of the report. This setting uses the standard add filter function.

Report Style

Choose from normal, mailing labels, or custom report.

Custom Report Name (setting visible when Custom Report is chosen as report style)

Use this item to choose the custom report (if any). The custom report must reside in the ...scanlon\dp50\reports\custom folder in order to be used.

Sort Order

Sort collection site list by code, name, state, or zip code.

Collection Site Range

Select a range of collection sites, or include all collection sites.

Active Status

Choose to print active collection sites only, inactive collection sites only, or both active and inactive collection sites.

Detail Level

Choose to show or hide hours information, pricing information, internal comments, public notes, and contact name.

Contact Filters (setting visible only for reports that have been assigned to contacts)

Click to view filters applied to this contact (if any) that will affect the records that will appear on this report.

1.13.2.3 Companies List

Use global report default (this check box is available in nearly every report setting)

Use this option to use the settings designated in the global report defaults for this report (found in Reports > Global Report Defaults > {Report Category} > {Report Name}).

Report Caption (setting visible only for reports that have been assigned to contacts)

This can be set to anything you like - like Bob's List of Companies. When you look at a contact's list of reports, the official DrugPak name will appear next to the report caption so you know exactly which report it is.

Task Options (setting visible only for users with DP Informer installed and only for reports that have been assigned to contacts)

By default, the contact's task generation options will be used. You can optionally override the contact's task options here by unchecking the "Use default task generation options from contact" check box. (See Contact Task Options for more info.)

Report Frequency (setting visible only for reports that have been assigned to contacts)

Print on-demand only: check this box if you do **not** want **this report** for **this contact** to be created when generating reports.

Allow generation only once every: when allowing generation (i.e., the "Print on-demand

only" box is unchecked), you can set the frequency that this report can be generated.

Don't allow generation again until at least: When using the report frequency (above), you can set the *earliest* date and time that **this report** for **this contact** can be generated.

Report Destination

Use this setting to determine where you want the report to go. Options are: Screen, Printer, File, E-mail, and Fax. You can use any or all of these destinations. You must choose at least one destination. *E-mail and fax destinations are available only for users who have DP Informer installed, and only for reports that have been assigned to a contact.*

Subject Line (setting visible when E-mail is chosen as a destination)

This text will be used for the subject line of the e-mail message containing this report. If this is left blank, the subject line from Communication Settings will be used.

Printer (setting visible only when Printer is chosen as destination)

Choose from either the default DrugPak printer (chosen through Reports > Printer Setup), or a specific printer.

Export Format (setting visible when File is chosen as a destination)

Use this setting to determine the format of the file to be created from this report. Formats include Adobe Acrobat PDF, Microsoft Word, ASCII, HTML, Excel, etc.

File Name (setting visible when File is chosen as destination)

Create a file name and set a location for the file that will be created from this report. A file name is required if you set the destination to a file.

Custom Filter

Optional filter(s) can be entered here to limit the scope of the report. This setting uses the standard add filter function.

Report Format

Choose from long form, short form, one-line form, mailing labels, or custom report.

Custom Report Name (setting visible when Custom Report is chosen as report format)

Use this item to choose the custom report (if any). The custom report must reside in the ...scanlon\dp50\reports\custom folder in order to be used.

Paging Options (setting visible when Long Form is chosen as report format)

Choose to print new page on company change, or no special paging option.

Subtitle (setting invisible when Mailing Labels is chosen as the Report Format)

Optionally add a subtitle to this report.

Company Scope

Use this setting to control which company/companies or consortia to include in the report. You can choose to print the report for a single company, for a consortium, for all companies, or for the current company (current company setting is not available for contact-specific reports). When printing a contact-specific report, this setting will be overridden by the location(s) that the contact is linked to (e.g., if you choose All Companies as a company scope, but the contact is linked to only Alpha

Trucking, the records in this report will be only those from Alpha Trucking.)

Sort Order

Use this setting to determine the order of companies in this report. Options include by company ID, company came, other ID, account number, sort 1, sort 2, date 1, date 2, state, or zip code.

Active Status (setting visible when All Companies or Consortium is chosen as company scope)

Choose to print active and inactive companies, active companies only, or both active and inactive companies.

Ranges (setting visible when All Companies or Consortium is chosen as company scope)

Select a range for each setting, or set one or more settings to include all items in that particular range on this report.

Contact Filters (setting visible only for reports that have been assigned to contacts)

Click to view filters applied to this contact (if any) that will affect the records that will appear on this report.

1.13.2.4 Consortia List

Use global report default (this check box is available in nearly every report setting)

Use this option to use the settings designated in the global report defaults for this report (found in Reports > Global Report Defaults > {Report Category} > {Report Name}).

Report Caption (setting visible only for reports that have been assigned to contacts)

This can be set to anything you like - like Bob's Consortia List. When you look at a contact's list of reports, the official DrugPak name will appear next to the report caption so you know exactly which report it is.

Task Options (setting visible only for users with DP Informer installed and only for reports that have been assigned to contacts)

By default, the contact's task generation options will be used. You can optionally override the contact's task options here by unchecking the "Use default task generation options from contact" check box. (See Contact Task Options for more info.)

Report Frequency (setting visible only for reports that have been assigned to contacts)

Print on-demand only: check this box if you do **not** want **this report** for **this contact** to be created when generating reports.

Allow generation only once every: when allowing generation (i.e., the "Print on-demand only" box is unchecked), you can set the frequency that this report can be generated.

Don't allow generation again until at least: When using the report frequency (above), you can set the *earliest* date and time that **this report** for **this contact** can be generated.

Use Custom Report

Check this box to use a custom report. If you are using a custom report, you must select the file using the Custom Report File Name prompt (directly below this prompt).

Custom Report File Name (setting visible when Use Custom Report box is checked)

Use this item to choose the custom report. The custom report must reside in the

...scanlon\dp50\reports\custom folder in order to appear when selecting a custom report.

Report Destination

Use this setting to determine where you want the report to go. Options are: Screen, Printer, File, E-mail, and Fax. You can use any or all of these destinations. You must choose at least one destination. *E-mail and fax destinations are available only for users who have DP Informer installed, and only for reports that have been assigned to a contact.*

Subject Line (setting visible when E-mail is chosen as a destination)

This text will be used for the subject line of the e-mail message containing this report. If this is left blank, the subject line from Communication Settings will be used.

Printer (setting visible only when Printer is chosen as destination)

Choose from either the default DrugPak printer (chosen through Reports > Printer Setup), or a specific printer.

Export Format (setting visible when File is chosen as a destination)

Use this setting to determine the format of the file to be created from this report. Formats include Adobe Acrobat PDF, Microsoft Word, ASCII, HTML, Excel, etc.

File Name (setting visible when File is chosen as destination)

Create a file name and set a location for the file that will be created from this report. A file name is required if you set the destination to a file.

Custom Filter

Optional filter(s) can be entered here to limit the scope of the report. This setting uses the standard add filter function.

Consortium Scope

Choose from either all consortia or single consortium.

Consortium (setting visible when Single Consortium is chosen as consortium scope)

Select a consortium.

Detail Level

Choose to print either company subtotals, or company totals only.

Each consortium on a new page (setting visible when Single Consortium is chosen as consortium scope)

This option will allow you to set the report to start a new page for each consortium.

Company Sort Order

Choose to sort companies listed within a consortium to be sorted by company ID or company name.

Contact Filters (setting visible only for reports that have been assigned to contacts)

Click to view filters applied to this contact (if any) that will affect the records that will appear on this report.

1.13.2.5 Contact List

Use global report default (this check box is available in nearly every report setting)

Use this option to use the settings designated in the global report defaults for this report (found in Reports > Global Report Defaults > {Report Category} > {Report Name}).

Report Caption (setting visible only for reports that have been assigned to contacts)

This can be set to anything you like - like Bob's Contacts List. When you look at a contact's list of reports, the official DrugPak name will appear next to the report caption so you know exactly which report it is.

Task Options (setting visible only for users with DP Informer installed and only for reports that have been assigned to contacts)

By default, the contact's task generation options will be used. You can optionally override the contact's task options here by unchecking the "Use default task generation options from contact" check box. (See Contact Task Options for more info.)

Report Frequency (setting visible only for reports that have been assigned to contacts)

Print on-demand only: check this box if you do **not** want **this report** for **this contact** to be created when generating reports.

Allow generation only once every: when allowing generation (i.e., the "Print on-demand only" box is unchecked), you can set the frequency that this report can be generated.

Don't allow generation again until at least: When using the report frequency (above), you can set the *earliest* date and time that **this report** for **this contact** can be generated.

Use Custom Report

Check this box to use a custom report. If you are using a custom report, you must select the file using the Custom Report File Name prompt (directly below this prompt).

Custom Report File Name (setting visible when Use Custom Report box is checked)

Use this item to choose the custom report. The custom report must reside in the ...scanlon\dp50\reports\custom folder in order to appear when selecting a custom report.

Report Destination

Use this setting to determine where you want the report to go. Options are: Screen, Printer, File, E-mail, and Fax. You can use any or all of these destinations. You must choose at least one destination. *E-mail and fax destinations are available only for users who have DP Informer installed, and only for reports that have been assigned to a contact.*

Subject Line (setting visible when E-mail is chosen as a destination)

This text will be used for the subject line of the e-mail message containing this report. If this is left blank, the subject line from Communication Settings will be used.

Printer (setting visible only when Printer is chosen as destination)

Choose from either the default DrugPak printer (chosen through Reports > Printer Setup), or a specific printer.

Export Format (setting visible when File is chosen as a destination)

Use this setting to determine the format of the file to be created from this report. Formats include Adobe Acrobat PDF, Microsoft Word, ASCII, HTML, Excel, etc.

File Name (setting visible when File is chosen as destination)

Create a file name and set a location for the file that will be created from this report. A file name is required if you set the destination to a file.

Custom Filter

Optional filter(s) can be entered here to limit the scope of the report. This setting uses the standard add filter function.

Sort by

Choose to sort list by display name, e-mail address, or last name.

Contact Filters (setting visible only for reports that have been assigned to contacts)

Click to view filters applied to this contact (if any) that will affect the records that will appear on this report.

1.13.2.6 Home Base List

Use global report default (this check box is available in nearly every report setting)

Use this option to use the settings designated in the global report defaults for this report (found in Reports > Global Report Defaults > {Report Category} > {Report Name}).

Report Caption (setting visible only for reports that have been assigned to contacts)

This can be set to anything you like - like Bob's Home Base List. When you look at a contact's list of reports, the official DrugPak name will appear next to the report caption so you know exactly which report it is.

Task Options (setting visible only for users with DP Informer installed and only for reports that have been assigned to contacts)

By default, the contact's task generation options will be used. You can optionally override the contact's task options here by unchecking the "Use default task generation options from contact" check box. (See Contact Task Options for more info.)

Report Frequency (setting visible only for reports that have been assigned to contacts)

Print on-demand only: check this box if you do **not** want **this report** for **this contact** to be created when generating reports.

Allow generation only once every: when allowing generation (i.e., the "Print on-demand only" box is unchecked), you can set the frequency that this report can be generated.

Don't allow generation again until at least: When using the report frequency (above), you can set the *earliest* date and time that **this report** for **this contact** can be generated.

Report Destination

Use this setting to determine where you want the report to go. Options are: Screen, Printer, File, E-mail, and Fax. You can use any or all of these destinations. You must choose at least one destination. *E-mail and fax destinations are available only for users who have DP Informer installed, and only for reports that have been assigned to a contact.*

Subject Line (setting visible when E-mail is chosen as a destination)

This text will be used for the subject line of the e-mail message containing this report. If this is left blank, the subject line from Communication Settings will be used.

Printer (setting visible only when Printer is chosen as destination)

Choose from either the default DrugPak printer (chosen through Reports > Printer Setup), or a specific

printer.

Export Format (setting visible when File is chosen as a destination)

Use this setting to determine the format of the file to be created from this report. Formats include Adobe Acrobat PDF, Microsoft Word, ASCII, HTML, Excel, etc.

File Name (setting visible when File is chosen as destination)

Create a file name and set a location for the file that will be created from this report. A file name is required if you set the destination to a file.

Custom Filter

Optional filter(s) can be entered here to limit the scope of the report. This setting uses the standard add filter function.

Report Style

Choose from normal, mailing label, or custom report.

Custom Report Name (setting visible when Use Custom Report box is checked)

Use this item to choose the custom report. The custom report must reside in the ...scanlon\dp50\reports\custom folder in order to appear when selecting a custom report.

Company Scope

Use this setting to control which company/companies or consortia to include in the report. You can choose to print the report for a single company, for a consortium, for all companies, or for the current company (current company setting is not available for contact-specific reports). When printing a contact-specific report, this setting will be overridden by the location(s) that the contact is linked to (e.g., if you choose All Companies as a company scope, but the contact is linked to only Alpha Trucking, the records in this report will be only those from Alpha Trucking.)

Active Companies Only

Choose to include only home bases that are linked to active companies, or home bases linked to all companies.

Sort Order

Choose to sort by home base code, home base name, state, or zip code.

Home Base Range

Using the find buttons to a range of home bases to print, or check the Include All box.

Active Status

Choose to print both active home bases, only active home bases, or only inactive home bases.

Contact Filters (setting visible only for reports that have been assigned to contacts)

Click to view filters applied to this contact (if any) that will affect the records that will appear on this report.

1.13.2.7 Labs List

Use global report default (this check box is available in nearly every report setting)

Use this option to use the settings designated in the global report defaults for this report (found in Reports > Global Report Defaults > {Report Category} > {Report Name}).

Report Caption (setting visible only for reports that have been assigned to contacts)

This can be set to anything you like - like Bob's Lab List. When you look at a contact's list of reports, the official DrugPak name will appear next to the report caption so you know exactly which report it is.

Task Options (setting visible only for users with DP Informer installed and only for reports that have been assigned to contacts)

By default, the contact's task generation options will be used. You can optionally override the contact's task options here by unchecking the "Use default task generation options from contact" check box. (See Contact Task Options for more info.)

Report Frequency (setting visible only for reports that have been assigned to contacts)

Print on-demand only: check this box if you do **not** want **this report** for **this contact** to be created when generating reports.

Allow generation only once every: when allowing generation (i.e., the "Print on-demand only" box is unchecked), you can set the frequency that this report can be generated.

Don't allow generation again until at least: When using the report frequency (above), you can set the *earliest* date and time that **this report** for **this contact** can be generated.

Report Destination

Use this setting to determine where you want the report to go. Options are: Screen, Printer, File, E-mail, and Fax. You can use any or all of these destinations. You must choose at least one destination. *E-mail and fax destinations are available only for users who have DP Informer installed, and only for reports that have been assigned to a contact.*

Subject Line (setting visible when E-mail is chosen as a destination)

This text will be used for the subject line of the e-mail message containing this report. If this is left blank, the subject line from Communication Settings will be used.

Printer (setting visible only when Printer is chosen as destination)

Choose from either the default DrugPak printer (chosen through Reports > Printer Setup), or a specific printer.

Export Format (setting visible when File is chosen as a destination)

Use this setting to determine the format of the file to be created from this report. Formats include Adobe Acrobat PDF, Microsoft Word, ASCII, HTML, Excel, etc.

File Name (setting visible when File is chosen as destination)

Create a file name and set a location for the file that will be created from this report. A file name is required if you set the destination to a file.

Custom Filter

Optional filter(s) can be entered here to limit the scope of the report. This setting uses the standard add filter function.

Report Style

Choose from normal, mailing label, or custom report.

Custom Report Name (setting visible when Use Custom Report box is checked)

Use this item to choose the custom report. The custom report must reside in the ...scanlon\dp50\reports\custom folder in order to appear when selecting a custom report.

Sort Order

Choose to sort by lab code, lab name, state, or zip code.

Lab Range

Use the find buttons to a range of labs to print, or check the Include All box.

Active Status

Choose to print both active labs, only active labs, or only inactive labs.

Contact Filters (setting visible only for reports that have been assigned to contacts)

Click to view filters applied to this contact (if any) that will affect the records that will appear on this report.

1.13.2.8 Participants List

Use global report default (this check box is available in nearly every report setting)

Use this option to use the settings designated in the global report defaults for this report (found in Reports > Global Report Defaults > {Report Category} > {Report Name}).

Report Caption (setting visible only for reports that have been assigned to contacts)

This can be set to anything you like - like Bob's Participants List. When you look at a contact's list of reports, the official DrugPak name will appear next to the report caption so you know exactly which report it is.

Task Options (setting visible only for users with DP Informer installed and only for reports that have been assigned to contacts)

By default, the contact's task generation options will be used. You can optionally override the contact's task options here by unchecking the "Use default task generation options from contact" check box. (See Contact Task Options for more info.)

Report Frequency (setting visible only for reports that have been assigned to contacts)

Print on-demand only: check this box if you do **not** want **this report** for **this contact** to be created when generating reports.

Allow generation only once every: when allowing generation (i.e., the "Print on-demand only" box is unchecked), you can set the frequency that this report can be generated.

Don't allow generation again until at least: When using the report frequency (above), you can set the *earliest* date and time that **this report** for **this contact** can be generated.

Report Destination

Use this setting to determine where you want the report to go. Options are: Screen, Printer, File, E-mail, and Fax. You can use any or all of these destinations. You must choose at least one destination. *E-mail and fax destinations are available only for users who have DP Informer installed, and only for reports that have been assigned to a contact.*

Subject Line (setting visible when E-mail is chosen as a destination)

This text will be used for the subject line of the e-mail message containing this report. If this is left blank, the subject line from Communication Settings will be used.

Printer (setting visible only when Printer is chosen as destination)

Choose from either the default DrugPak printer (chosen through Reports > Printer Setup), or a specific printer.

Export Format (setting visible when File is chosen as a destination)

Use this setting to determine the format of the file to be created from this report. Formats include Adobe Acrobat PDF, Microsoft Word, ASCII, HTML, Excel, etc.

File Name (setting visible when File is chosen as destination)

Create a file name and set a location for the file that will be created from this report. A file name is required if you set the destination to a file.

Custom Filter

Optional filter(s) can be entered here to limit the scope of the report. This setting uses the standard add filter function.

Report Style

Choose to print long form, short form, one-line form, mailing labels, or a custom report

Custom Report Name (setting visible when Use Custom Report box is checked)

Use this item to choose the custom report. The custom report must reside in the ...scanlon\dp50\reports\custom folder in order to appear when selecting a custom report.

Company Scope

Use this setting to control which company/companies or consortia to include in the report. You can choose to print the report for a single company, for a consortium, for all companies, or for the current company (current company setting is not available for contact-specific reports). When printing a contact-specific report, this setting will be overridden by the location(s) that the contact is linked to (e.g., if you choose All Companies as a company scope, but the contact is linked to only Alpha Trucking, the records in this report will be only those from Alpha Trucking.)

Company (setting visible when company is chosen in the Company Scope setting)

Use the Find button to select the desired company.

Consortium (setting visible when consortium is chosen in Company Scope setting)

Use the Find button to select the desired consortium.

Group Participants By

Choose to sort participants by home base, occupation, pool group, or no grouping.

Paging Options (setting visible when long form is chosen in Report Style setting)

Choose to no paging, or new page on group change (i.e., based on the "Group Participants by" setting

- home base, occupation, or pool group).

SSN Cosmetics

This setting determines how the Social Security number/Social Insurance number is displayed on reports. For example, choosing XXX-XX-6789 will mask the first five digits of an SSN/SIN, and display the last four digits. Choose the appropriate masking format, or choose to use either the global setting (Preferences > Global Settings > Main Module > Participant Options > SSN Cosmetics), or the global report default setting (found in Reports > Global Report Defaults > File Lists > Participants List)

Sort Participants By

Choose to sort participants by one of many possible values, including name, SSN, participant ID.

Enter a Range of Participants

Use the find buttons to select a range of participants, or check the Include All box.

DOT Status

Choose to print all participants, regardless of their DOT status, only DOT participants, or only non-DOT participants.

Termination Status

Choose to print all participants ("Ignore termination status"), only active participants, or only terminated participants.

"Include in Randoms" Status

Choose to print all participants ('Ignore "Include in Randoms" Status), only those set to be included randoms, or only those set to not be included in randoms.

Contact Filters (setting visible only for reports that have been assigned to contacts)

Click to view filters applied to this contact (if any) that will affect the records that will appear on this report.

1.13.2.9 Third Parties List

Use global report default (this check box is available in nearly every report setting)

Use this option to use the settings designated in the global report defaults for this report (found in Reports > Global Report Defaults > {Report Category} > {Report Name}).

Report Caption (setting visible only for reports that have been assigned to contacts)

This can be set to anything you like - like Bob's Third Party List. When you look at a contact's list of reports, the official DrugPak name will appear next to the report caption so you know exactly which report it is.

Task Options (setting visible only for users with DP Informer installed and only for reports that have been assigned to contacts)

By default, the contact's task generation options will be used. You can optionally override the contact's task options here by unchecking the "Use default task generation options from contact" check box. (See Contact Task Options for more info.)

Report Frequency (setting visible only for reports that have been assigned to contacts)

Print on-demand only: check this box if you do **not** want **this report** for **this contact** to be created when generating reports.

Allow generation only once every: when allowing generation (i.e., the "Print on-demand only" box is unchecked), you can set the frequency that this report can be generated.

Don't allow generation again until at least: When using the report frequency (above), you can set the *earliest* date and time that **this report** for **this contact** can be generated.

Report Destination

Use this setting to determine where you want the report to go. Options are: Screen, Printer, File, E-mail, and Fax. You can use any or all of these destinations. You must choose at least one destination. *E-mail and fax destinations are available only for users who have DP Informer installed, and only for reports that have been assigned to a contact.*

Subject Line (setting visible when E-mail is chosen as a destination)

This text will be used for the subject line of the e-mail message containing this report. If this is left blank, the subject line from Communication Settings will be used.

Printer (setting visible only when Printer is chosen as destination)

Choose from either the default DrugPak printer (chosen through Reports > Printer Setup), or a specific printer.

Export Format (setting visible when File is chosen as a destination)

Use this setting to determine the format of the file to be created from this report. Formats include Adobe Acrobat PDF, Microsoft Word, ASCII, HTML, Excel, etc.

File Name (setting visible when File is chosen as destination)

Create a file name and set a location for the file that will be created from this report. A file name is required if you set the destination to a file.

Custom Filter

Optional filter(s) can be entered here to limit the scope of the report. This setting uses the standard add filter function.

Report Style

Choose to print long form, short form, one-line form, mailing labels, or a custom report

Custom Report Name (setting visible when Use Custom Report box is checked)

Use this item to choose the custom report. The custom report must reside in the ...scanlon\dp50\reports\custom folder in order to appear when selecting a custom report.

Sort Order

Choose to print third parties by code, name, state, or zip code.

Third Party Range

Use the find buttons to select a range of third parties, or check the Include All box.

Active Status

Choose to print all third parties (Active and Inactive), only active third partiers, or only inactive third parties.

Contact Filters (setting visible only for reports that have been assigned to contacts)

Click to view filters applied to this contact (if any) that will affect the records that will appear on this report.

1.13.3 Results

1.13.3.1 Incomplete Results

This report will review a range of result records and print an audit trail of result records which are missing important information. The Incomplete Test Results report uses the same validation criteria as the instant audit feature. These criteria are set in Preferences > Global Settings > Main Module > Incomplete Test Options.

Use global report default (this check box is available in nearly every report setting)

Use this option to use the settings designated in the global report defaults for this report (found in Reports > Global Report Defaults > {Report Category} > {Report Name}).

Report Caption (setting visible only for reports that have been assigned to contacts)

This can be set to anything you like - like Bob's activity summary or Jane's activity report. When you look at a contact's list of reports, the official DrugPak name will appear next to the report caption so you know exactly which report it is.

Task Options (setting visible only for users with DP Informer installed and only for reports that have been assigned to contacts)

By default, the contact's task generation options will be used. You can optionally override the contact's task options here by unchecking the "Use default task generation options from contact" check box. (See Contact Task Options for more info.)

Report Frequency (setting visible only for reports that have been assigned to contacts)

Print on-demand only: check this box if you do **not** want **this report** for **this contact** to be created when generating reports.

Allow generation only once every: when allowing generation (i.e., the "Print on-demand only" box is unchecked), you can set the frequency that this report can be generated.

Don't allow generation again until at least: When using the report frequency (above), you can set the *earliest* date and time that **this report** for **this contact** can be generated.

Report Destination

Use this setting to determine where you want the report to go. Options are: Screen, Printer, File, E-mail, and Fax. You can use any or all of these destinations. You must choose at least one destination. *E-mail and fax destinations are available only for users who have DP Informer installed, and only for reports that have been assigned to a contact.*

Use Custom Report

Choose whether or not to use a custom report.

Custom Report File Name (setting visible when Use Custom Report box is checked)

Use this item to choose the custom report (if any). The custom report must reside in the

...scanlon\dp50\reports\custom folder in order to be used.

Subject Line (setting visible when E-mail is chosen as a destination)

This text will be used for the subject line of the e-mail message containing this report. If this is left blank, the subject line from Communication Settings will be used.

Printer (setting visible only when Printer is chosen as destination)

Choose from either the default DrugPak printer (chosen through Reports > Printer Setup), or a specific printer.

Export Format (setting visible when File is chosen as a destination)

Use this setting to determine the format of the file to be created from this report. Formats include Adobe Acrobat PDF, Microsoft Word, ASCII, HTML, Excel, etc.

File Name (setting visible when File is chosen as destination)

Create a file name and set a location for the file that will be created from this report. A file name is required if you set the destination to a file.

Report Style

Choose to print normal format or short format.

Company Scope

Use this setting to control which company/companies or consortia to include in the report. You can choose to print the report for a single company, for a consortium, for all companies, or for the current company (current company setting is not available for contact-specific reports). When printing a contact-specific report, this setting will be overridden by the location(s) that the contact is linked to (e.g., if you choose All Companies as a company scope, but the contact is linked to only Alpha Trucking, the records in this report will be only those from Alpha Trucking.)

Company (setting visible when company is chosen in the Company Scope setting)

Use the Find button to select the desired company.

Consortium (setting visible when consortium is chosen in Company Scope setting)

Use the Find button to select the desired consortium.

Active Companies Only (setting visible when either Consortium or All Companies is chosen in Company Scope setting)

When this box is unchecked, only incomplete results linked to participants in *active* companies will be included in this report.

Print Each Company on a Separate Page (setting visible when either Consortium or All Companies is chosen in Company Scope setting)

When this box is checked, the incomplete results for each company will print on separate pages.

Range Options

Choose which range to apply to the report. Options include collection date or batch ID.

Date Range (setting visible when date is selected as range option)

Using the find buttons, set the date range for the report, or select all dates by checking the "Include All Dates" box.

Batch Range (setting visible when batch ID is selected as range option)

Using the find buttons, set the batch ID range for the report, or select all batches by checking the "Include All" box.

Audit Blank Collection Dates (setting visible when date is selected as range option)

Check this box to include results with no collection dates. Uncheck this box to not include results with no collection date.

Ignore Blank Dates for Batches Generated After (setting visible when audit blank collection dates box is checked)

You may not want to audit result records from a recent random selection whose results have not yet been entered. A record with a blank collection date will not be audited if it is part of a (RND) random batch generated after this date.

DOT Status

Choose to print all participants, regardless of their DOT status, only DOT participants, or only non-DOT participants.

Include Excused Tests

Choose to include or exclude excused tests.

Test Statuses

Choose the test statuses to be included in report.

Contact Filters (setting visible only for reports that have been assigned to contacts)

Click to view filters applied to this contact (if any) that will affect the records that will appear on this report.

1.13.3.2 Letter to a Prospective Employer

Each Letter to a Prospective Employer lists the results of a particular participant's drug or alcohol tests within a specified date range. This report serves to comply with a request from a prospective employer to disclose a participant's testing history and can be configured for only one participant at a time.

Use global report default (this check box is available in nearly every report setting)

Use this option to use the settings designated in the global report defaults for this report (found in Reports > Global Report Defaults > {Report Category} > {Report Name}).

Report Caption (setting visible only for reports that have been assigned to contacts)

This can be set to anything you like - like Bob's Letter to Prospective Employer. When you look at a contact's list of reports, the official DrugPak name will appear next to the report caption so you know exactly which report it is.

Task Options (setting visible only for users with DP Informer installed and only for reports that have been assigned to contacts)

By default, the contact's task generation options will be used. You can optionally override the contact's task options here by unchecking the "Use default task generation options from contact" check box. (See Contact Task Options for more info.)

Report Frequency (setting visible only for reports that have been assigned to contacts)

Print on-demand only: check this box if you do **not** want **this report** for **this contact** to be created when generating reports.

Allow generation only once every: when allowing generation (i.e., the "Print on-demand only" box is unchecked), you can set the frequency that this report can be generated.

Don't allow generation again until at least: When using the report frequency (above), you can set the *earliest* date and time that **this report** for **this contact** can be generated.

Report Destination

Use this setting to determine where you want the report to go. Options are: Screen, Printer, File, E-mail, and Fax. You can use any or all of these destinations. You must choose at least one destination. *E-mail and fax destinations are available only for users who have DP Informer installed, and only for reports that have been assigned to a contact.*

Subject Line (setting visible when E-mail is chosen as a destination)

This text will be used for the subject line of the e-mail message containing this report. If this is left blank, the subject line from Communication Settings will be used.

Printer (setting visible only when Printer is chosen as destination)

Choose from either the default DrugPak printer (chosen through Reports > Printer Setup), or a specific printer.

Export Format (setting visible when File is chosen as a destination)

Use this setting to determine the format of the file to be created from this report. Formats include Adobe Acrobat PDF, Microsoft Word, ASCII, HTML, Excel, etc.

File Name (setting visible when File is chosen as destination)

Create a file name and set a location for the file that will be created from this report. A file name is required if you set the destination to a file.

Custom Filter

Optional filter(s) can be entered here to limit the scope of the report. This setting uses the standard add filter function.

Participant

Use the find button to select a participant. This field specifies which participants' test result records are eligible for disclosure on this letter.

Earliest Test Date

Results with collection dates on or after to this date (and on or prior to the workstations' system date) will be included in this letter.

Use automatic date range (only available for contact-specific reports)

Check this box to set an automatic date range based on the current date: (such as current date plus 7 days to current date plus 21 days)

"From" Address Lines

Enter your company's return address.

"To" Address Lines

Enter the prospective employer's address.

Contact Filters (setting visible only for reports that have been assigned to contacts)

Click to view filters applied to this contact (if any) that will affect the records that will appear on this report.

1.13.3.3 Result Letters

Each participant's result letter discloses the results of a particular participant's drug or alcohol test. This report may be printed for a specific test result or for a range of test results

- Records without collection dates will not be printed
- Notes entered in the Results Letter Comment box of the result record (if any) will appear on result letters

Use global report default (this check box is available in nearly every report setting)

Use this option to use the settings designated in the global report defaults for this report (found in Reports > Global Report Defaults > {Report Category} > {Report Name}).

Report Caption (setting visible only for reports that have been assigned to contacts)

This can be set to anything you like - like Bob's Result Letters. When you look at a contact's list of reports, the official DrugPak name will appear next to the report caption so you know exactly which report it is.

Task Options (setting visible only for users with DP Informer installed and only for reports that have been assigned to contacts)

By default, the contact's task generation options will be used. You can optionally override the contact's task options here by unchecking the "Use default task generation options from contact" check box. (See Contact Task Options for more info.)

Report Frequency (setting visible only for reports that have been assigned to contacts)

Print on-demand only: check this box if you do **not** want **this report** for **this contact** to be created when generating reports.

Allow generation only once every: when allowing generation (i.e., the "Print on-demand only" box is unchecked), you can set the frequency that this report can be generated.

Don't allow generation again until at least: When using the report frequency (above), you can set the *earliest* date and time that **this report** for **this contact** can be generated.

Report Destination

Use this setting to determine where you want the report to go. Options are: Screen, Printer, File, E-mail, and Fax. You can use any or all of these destinations. You must choose at least one destination. *E-mail and fax destinations are available only for users who have DP Informer installed, and only for reports that have been assigned to a contact.*

Subject Line (setting visible when E-mail is chosen as a destination)

This text will be used for the subject line of the e-mail message containing this report. If this is left blank, the subject line from Communication Settings will be used.

Printer (setting visible only when Printer is chosen as destination)

Choose from either the default DrugPak printer (chosen through Reports > Printer Setup), or a specific printer.

Export Format (setting visible when File is chosen as a destination)

Use this setting to determine the format of the file to be created from this report. Formats include Adobe Acrobat PDF, Microsoft Word, ASCII, HTML, Excel, etc.

File Name (setting visible when File is chosen as destination)

Create a file name and set a location for the file that will be created from this report. A file name is required if you set the destination to a file.

Custom Filter

Optional filter(s) can be entered here to limit the scope of the report. This setting uses the standard add filter function.

Result Letter Format

Choose "original," standard, or custom format. (The original format has less detail than the standard format, does **not** support MRO signature options, and is included only for the sake of consistency with older versions of DrugPak. The standard format is preferred.)

Company Scope

Use this setting to control which company/companies or consortia to include in the report. You can choose to print the report for a single company, for a consortium, for all companies, or for the current company (current company setting is not available for contact-specific reports). When printing a contact-specific report, this setting will be overridden by the location(s) that the contact is linked to (e.g., if you choose All Companies as a company scope, but the contact is linked to only Alpha Trucking, the records in this report will be only those from Alpha Trucking.)

Active Companies Only

If this box is checked, only test results linked to participants that are in *active* companies will be included in this report.

Range Options

Choose to print result letters based on participant ID and batch ID, or participant ID and (collection) date.

Enter a Range of Participants

Select a range of participants using the find buttons, or check the "Include All" box.

Enter a Range of Batch IDs (visible only when Range Options is set to Participant / Batch)
Select a range of batch IDs, or check the "Include All" box.

Enter a Range of Collection Dates (visible when Range Options is set to Participant / Date)
Select a range of dates, or check the "Include All Dates" box.

Use automatic date range (only available for contact-specific reports)

Check this box to set an automatic date range based on the current date: (such as current date plus 7 days to current date plus 21 days)

Substance Options

Use this setting to choose to include drug results, alcohol results, or both drug and alcohol results.

DOT Options

Use this setting to include only DOT results, only non-DOT results, or both DOT and non-DOT results.

Test Statuses

Select which result statuses should be included when printing result letters.

Include Letters Already Printed

Uncheck this box to exclude results for which result letters have already been printed.

DOT Message for Report Footer

Enter text to appear at the bottom of all on DOT result letters. This message will *not* appear on result letters for non-DOT tests.

Non-DOT Message for Report Footer

Enter text to appear at the bottom of all non-DOT result letters. This message will *not* appear on result letters for DOT tests.

SSN Cosmetics

This setting determines how the Social Security number/Social Insurance number is displayed on reports. For example, choosing XXX-XX-6789 will mask the first five digits of an SSN/SIN, and display the last four digits. Choose the appropriate masking format, or choose to use either the global setting (Preferences > Global Settings > Main Module > Participant Options > SSN Cosmetics), use the global report default setting (Reports > Global Report Defaults > File Lists > Participants List)

Display "Other ID" as Participant ID

Check this box to display the participants' other ID in place of the participant ID.

Suppress MRO Info for Non-DOT

Check this box to suppress the MRO name, signature line, and verification date from result letters for non-DOT tests.

Suppress MRO Info for Alcohol

Check this box to suppress the MRO name, signature line, and verification date from result letters for alcohol tests.

Signature Line Options

This options determines which MRO name (if present) will be displayed on the result letter. The options include:

- Result MRO
- Company MRO
- Omit signature line
- Manually entering an MRO name (Enter Below)

Label for Signature Line (setting only visible when "Enter Below" is selected as the signature line option)

Enter an MRO name in the box, or use the find button to select an MRO name.

Print MRO Signature Line

Choose to always print the MRO signature image (when available), never print the MRO signature, or print the MRO signature (when available) for only negative test results. (See the MRO names topic for more information about MRO signatures.)

Mail-To Address

Select which mail-to address (if any) to appear on the result letter.

Include Default Return Address

Check this box to make the address set in Preferences > Global Settings > Main Module > General Options > Business Address appear at the top of the result letters.

Contact Filters (setting visible only for reports that have been assigned to contacts)

Click to view filters applied to this contact (if any) that will affect the records that will appear on this report.

1.13.3.4 Results List

Use global report default (this check box is available in nearly every report setting)

Use this option to use the settings designated in the global report defaults for this report (found in Reports > Global Report Defaults > {Report Category} > {Report Name}).

Report Caption (setting visible only for reports that have been assigned to contacts)

This can be set to anything you like - like Bob's Result List. When you look at a contact's list of reports, the official DrugPak name will appear next to the report caption so you know exactly which report it is.

Task Options (setting visible only for users with DP Informer installed and only for reports that have been assigned to contacts)

By default, the contact's task generation options will be used. You can optionally override the contact's task options here by unchecking the "Use default task generation options from contact" check box. (See Contact Task Options for more info.)

Report Frequency (setting visible only for reports that have been assigned to contacts)

Print on-demand only: check this box if you do **not** want **this report** for **this contact** to be created when generating reports.

Allow generation only once every: when allowing generation (i.e., the "Print on-demand only" box is unchecked), you can set the frequency that this report can be generated.

Don't allow generation again until at least: When using the report frequency (above), you can set the *earliest* date and time that **this report** for **this contact** can be generated.

Report Destination

Use this setting to determine where you want the report to go. Options are: Screen, Printer, File, E-mail, and Fax. You can use any or all of these destinations. You must choose at least one destination. *E-mail and fax destinations are available only for users who have DP Informer installed,*

and only for reports that have been assigned to a contact.

Subject Line (setting visible when E-mail is chosen as a destination)

This text will be used for the subject line of the e-mail message containing this report. If this is left blank, the subject line from Communication Settings will be used.

Printer (setting visible only when Printer is chosen as destination)

Choose from either the default DrugPak printer (chosen through Reports > Printer Setup), or a specific printer.

Export Format (setting visible when File is chosen as a destination)

Use this setting to determine the format of the file to be created from this report. Formats include Adobe Acrobat PDF, Microsoft Word, ASCII, HTML, Excel, etc.

File Name (setting visible when File is chosen as destination)

Create a file name and set a location for the file that will be created from this report. A file name is required if you set the destination to a file.

Custom Filter

Optional filter(s) can be entered here to limit the scope of the report. This setting uses the standard add filter function.

Title

Create a useful title to appear at the top of this report.

Report Format

Choose the standard format, data format (CSV), or custom report. This is meant to be used when creating a file (chosen in Report Destination) from this report.

Custom Report Name (setting visible when custom report is chosen as the report format)

Use this item to choose the custom report. The custom report must reside in the ...scanlon\dp50\reports\custom folder in order to appear when selecting a custom report.

Detail Level

Choose one-line format, two-line format, short form, or long form.

Show Details

Check this box to show the details of each test that appears on this report. Without details, the report will show just a total number of tests.

Show Report Summary

Check this box to display a grid that displays how many tests for each test type, DOT vs. non-DOT, alcohol vs. drug, etc.

Report Summary on Separate Page (visible only when Show Report Summary box is checked)

Check this box to make the report summary appear on a separate page.

Company Scope

Use this setting to control which company/companies or consortia to include in the report. You can

choose to print the report for a single company, for a consortium, for all companies, or for the current company (current company setting is not available for contact-specific reports). When printing a contact-specific report, this setting will be overridden by the location(s) that the contact is linked to (e.g., if you choose All Companies as a company scope, but the contact is linked to only Alpha Trucking, the records in this report will be only those from Alpha Trucking.)

Company (setting visible when company is chosen in the Company Scope setting)

Use the Find button to select the desired company.

Consortium (setting visible when consortium is chosen in Company Scope setting)

Use the Find button to select the desired consortium.

Active Companies Only

If this box is checked, only test results linked to participants that are in *active* companies will be included in this report.

Group By

Choose to group result listings by company, home bases, or no grouping.

Page Break on Company Change (setting available only when you have chosen to either Company or Home Base in the Group By setting)

Check this box to have the results list for each company to appear on separate pages.

Show Company Summary (setting available only when you have chosen to group result list)

Check this box to display a grid that displays how many tests within each company for each test type, DOT vs. non-DOT, alcohol vs. drug, and totals.

Print Company Summary on Separate Page (setting available only when Show Company Summary box is checked)

Check this box to make the report summaries for each company appear separate from the details.

Page Break on Home Base Change (setting available only when you have chosen to group by home base)

Check this box to have the results summaries for each home base to separate from the details.

Show Home Base Summary (setting available only when grouping by home base)

Check this box to display a grid that displays how many tests within each home base for each test type, DOT vs. non-DOT, alcohol vs. drug, and totals.

Print Home Base Summary on Separate Page (setting available only when Show Home Base Summary box is checked)

Check this box to make the report summaries for each home base appear separate from the details.

Subgroup by

Choose from multiple options, including occupation, lab, collection site, result status, test type, etc.

Page Break on Subgroup Change (setting available when subgrouping)

Check this box to have the results list fro each subgroup to appear on a separate page.

Show Subgroup Summary (setting available when subgrouping)

Check this box to display a grid that displays how many tests within each subgroup for each test type,

DOT vs. non-DOT, alcohol vs. drug, and totals.

Print Subgroup Summary on Separate Page (setting available only when Show Subgroup Summary box is checked)

Order Report By

Select from test, then participant, or participant, then test.

Sort Test By

Select from batch ID or collection date.

Enter Range of Batch IDs (setting available only when Sort Tests By is set to Batches)

Using the find buttons, select a range of batch IDs, or check the Include All box.

Enter Range of Collection Dates (setting available only when Sort Tests By is set to Collection Date)

Using the calendar function (by pressing the down arrow), choose a date range for the report, or check the Include All Dates box.

Sort Participant By

Select from participant ID, Social Security number, or alphabetically (Alpha Sort Field).

Enter a Range of Participant IDs, SSNs, or Alpha Sorts (dependant upon the Sort Participants By setting)

Using the find buttons, select a range of participant IDs, or check the Include All check box.

DOT Status

Choose to print all participants, regardless of their DOT status, only DOT participants, or only non-DOT participants.

Substance Types

Use this setting to choose to include drug results, alcohol results, or both drug and alcohol results.

Test Statuses

Select which result statuses should be included when printing result letters.

Termination Status

Choose to print all participants ("Ignore termination status"), only active participants, or only terminated participants.

SSN Cosmetics

This setting determines how the Social Security number/Social Insurance number is displayed on reports. For example, choosing XXX-XX-6789 will mask the first five digits of an SSN/SIN, and display the last four digits. Choose the appropriate masking format, or choose to use either the global setting (Preferences > Global Settings > Main Module > Participant Options > SSN Cosmetics), use the global report default setting (Reports > Global Report Defaults > File Lists > Participants List)

Anonymous

Check this box to hide the donor's name and Social Security number.

Contact Filters (setting visible only for reports that have been assigned to contacts)

Click to view filters applied to this contact (if any) that will affect the records that will appear on this report.

1.13.4 Follow-Up Test Schedule Notifications

This feature allows you to generate a schedule of follow-up tests for a participant.

- Schedule tests one day at a time, or automatically schedule tests in a range of dates
- Print lists of scheduled tests, and personalized notification letters for a range of participants and dates
- This tool does not automatically create test result records, nor does it confirm that the test records have been entered
- This window is composed of two tabs: Generate Schedule and Print Schedule / Notifications

Generate Schedule Tab

Participant ID

Press the down arrow or use the find button the select a participant (from the current company).

Starting Date

Enter the first date on which a follow-up test may be scheduled. (Pressing the down arrow will display a calendar.)

Ending Date

Enter the last date on which a follow-up test may be scheduled.(Pressing the down arrow will display a calendar.)

Number of Tests

Enter the number of tests you would like to schedule within the specified date range. You can type directly into the field or use the up and down arrows to increase or decrease the number of tests to be scheduled within the above date range.

Substances

Select what types of tests are to be scheduled. The options include: Drugs only, Alcohol only, or Drugs and Alcohol.

Random Scheduling

Check this box to randomly schedule testing dates within the date range. Uncheck this box to schedule testing dates in regular intervals throughout the date range.

Generate Schedule

Click this button to generate a follow-up test schedule using the above settings. You will then be taken to the Print Schedule/Notifications tab.

Print Schedule / Notifications Tab

Participant ID

If you have just created a schedule of follow-up tests for a participant, that participant will be displayed. Otherwise, using either the down arrow or the find button, select the participant whose follow-up test schedule you would like to display and/or print. (Only participants within the current company will be displayed.)

Date Search

Enter a date to find the closest scheduled follow-up test for the specified participant.

Schedule Grid

This grid displays all the follow-up tests which have been scheduled for the selected participant. Double-click a row in the grid to print a notification letter for that specific test.

Print Notification Letter

Click this button to print a notification letter for the test which is highlighted in the Schedule Grid.

Letter Date

Enter the notification date which you would like to appear on the notification letter.

Drug Test Collection Site

This will be filled in this order: default drug collection site (if specified) for the participant's home base(if specified) > default drug collection site for the participant's company (if specified) > global default drug collection site (if specified). If no drug collection site has been specified at any of those levels, use the find button to choose a drug collection site. This site will appear on the letter for a scheduled drug test.

Alcohol Test Collection Site

This will be filled in this order: default alcohol collection site (if specified) for the participant's home (if specified) > default alcohol collection site for the participant's company (if specified) > global default alcohol collection site (if specified). If no alcohol collection site has been specified at any of those levels, use the find button to choose a alcohol collection site. This site will appear on the letter for a scheduled drug test.

Notification Letter Printed Successfully

This check box indicates whether the notification letter was printed successfully. It defaults to the unchecked position, but will be checked after you print the Letter.

Print Schedule

Click this button to print a report listing scheduled follow-up tests.

Sort By

Use this to control the sequence in which records are listed on the report. You can choose to list scheduled tests by Participant ID or by Schedule Date.

"Un-Notified" Tests Only

Check this box to print scheduled tests for which follow-up test notification letters (see above) have *not* been printed. Uncheck this box to print scheduled tests regardless of whether the letters have been printed.

Report Scope

Use this setting to control which participants' scheduled tests will be printed. The options include Current Participant, Current Company, All companies, or Consortium.

Consortium (setting available only when consortium is chosen as company scope)

Select a consortium.

Report Range

Start Date

Enter the first date for which scheduled tests should appear in the report.

End Date

Enter the last date for which scheduled tests should appear in the report.

1.13.5 Summary of Drug Testing

This report provides statistical analysis of results in a date range.

- Statistics are grouped by occupation and totaled
- Print this report for a single company or a consortium
- When printing for a consortium, print a separate report for each company, or compile a single report for all companies in the consortium
- Before printing this report, you should print the Incomplete Test Results report to be sure that all result data in the requested range has been completed

Sum Each Company Separately (setting is not available when Consortium is chosen for Company Scope)

Check this box to sum each company within a consortium on a separate page.

DOT Status Options

Choose to print all participants, regardless of their DOT status, only DOT participants, or only non-DOT participants. This filter applies to the DOT status of test results, not the DOT status of the participants.

Print Grand Totals Only

Uncheck this box to print this report grouped by occupation. Check this box for grand totals only (i.e., no breakdown by occupation). (The grand totals will always print regardless of this setting.)

Never Print DOT Matrix (setting available only when DOT Only is selected as DOT Status Option)

Check this box if you do not want to print the DOT matrix (the report displays the number of active DOT participants broken down by DOT administration, then by occupation)

Matrix For RandSel DOT Only (setting available only when DOT Only is selected as DOT Status Option and disabled when "Never Print DOT Matrix" is checked)

Check this box if you only wish to include participants in the DOT Matrix report if the participant is active and eligible for inclusion in random selections.

Date Range

Enter a range of collection dates to include in the report. It is not possible to specify a date range that includes blank collection dates. (You may wish to run the Incomplete Test Results report to identify records with blank collection dates.)

Include... Check Boxes

Optionally include other test statuses by checking or unchecking the appropriate boxes.

Substance Types

Use this setting to choose to include drug results, alcohol results, or both drug and alcohol results.

1.13.6 Reprint Selection Audit Trail

This option allows you to reprint reports from previously drawn random batches.

Single Batch Tab

Select the batch number by pressing the find button and selecting the batch number from the list, or by choosing a batch number from the menu. Then choose the reports by placing a check box beside each desired report.

Exclude Companies Whose Reports Are Generated

Check this box to exclude reports that have been configured for company contacts. For example, if a company has at least one contact with notification letters, and the notification letters report for that contact is configured to be generated(e-mail/fax/printer), when the "Exclude companies..." box is checked, *and* you choose to reprint all six possible random selection reports, the notification letters will *not* be printed, but the remaining five selected reports *will* be printed.

Modify Report Settings

If you do not want to use the report setting configured for the profile used to create the selected batch, press this button to modify the print settings

Use Profile's Report Settings

Press this button to the use the *current* report settings for the profile that was used to create the selected batch.

Multiple Batches Tab

Choose the desired batch numbers by entering the desired date range of the generation date(s) and pressing the Get Batches button. This will display and select all batches generated between those two dates. (The same date may be used for both start date and end date.) You may also deselect individual batches if you wish. Once you have selected the appropriate batches, you may press the Print button to print the reports.

- The reports will obey the report settings set for the profile used for each batch
- When printing multiple batches, the reports will go directly to the printer

1.13.7 Random Selection Statistics

The Random Selection Statistics report is a useful tool for tracking your clients' compliance with your random drug and alcohol testing programs. These reports help you identify which companies have not met their quotas by sending selected employees for testing.

Print Program Analysis

You should not send this report to your clients, because it has information about multiple companies on the same page. The report is grouped in several levels:

- Single Company Randoms and Multi-Company Randoms are in separate groups
- Every Profile Name is grouped separately under group
- Every Random Batch is grouped separately under group
- Every company's performance for that batch is listed in a single line under group

This report will help you make sure that each individual batch is in compliance. If there is a shortfall, you will be able to tell how many results are incomplete (neither collected nor canceled), and how many alternates you may need to select (to replace canceled results).

Print Location Analysis

This is a good report to send to your clients, because it has information which is separated by company or home base. Every location is printed on a separate page. Every batch is listed separately

for that location. If the location has met its quota, then the report will demonstrate that. If the location has not met its quotas, then an extra page will print, listing the specific open result records.

Generation Dates From/To

Enter the beginning and ending batch generation dates for the period on which you want to report.

Single/Multiple Company Randoms

The choices are (both) Single- and Multi-Company Randoms, (only) Single-Company Randoms, and (only) Multi-Company Randoms.

- Choosing Single-Company Randoms will display a "company" item (that lets you choose a company), or a check box to include "All Companies"
- Choosing Multi-Company Randoms will display a "consortium" item (that lets you choose a consortium), or a check box to include "All Consortia"

All Profiles/Profile name

To include all profiles, check this box, otherwise, uncheck this box, and choose a profile from the drop-down list.

Batches in range/Batches included in report

Based on the choices made in the above items, batches will appear on the left side of the window (Batches in Ranges). You can "Add All" batches to the report, or "Add" individual batches to the report by pressing the appropriate button. Batches listed in the Batches in Range grid will *not* appear in the report(s), batches in the "Batches Included in Report" will.

All Batches in Range

Check this box to automatically include all batches in range on the report (essentially, this has the same effect as pressing the Add All >> button).

1.14 Randoms Menu

1.14.1 Random Selection Overview

This drug testing compliance software treats random tests differently than other test types. In other test types, you tell the computer who is participating. With random testing, however, the computer tells you who is participating. This is done through the Random Selection Process. This software is designed under the premise that the cornerstone of every substance abuse deterrence program is verifiable, unbiased random selection.

When choosing participants for a random test, the computer uses a basic and complete method to insure unbiased selections. It is a double-blind selection method--one in which neither the administrators nor the participants can predict or affect the outcome. The computer does not examine participant IDs, length of service, Social Security numbers, nor does it take into account how many times, when, or whether participants have been tested in the past. *Each random selection is completely unaware of every previous random selection.* For example, if you have a company with 100 eligible participants, and you select participants for random drug testing every month at a rate of 10% - each participant has a 10% chance of being chosen. And each participant has the *same* 10% chance of being chosen every pull. The important thing to remember is that when a participant is chosen for a drug test one month, their chances of being pulled each subsequent pull is *the same*.

Additionally, DrugPak is written in a popular programming language called Delphi. The following document includes an analysis of Delphi's random number generator http://www.cev.ie/htm/tenders/pdf/3_26.pdf

1.14.2 Alternates Overview

Using Alternates is a good way to stay in compliance with the testing quotas of your random selection program. Primary participants can be excused from testing for a variety of reasons, such as no longer working for the company. In such a case, an alternate should take the place of the primary participant.

This software anticipates the need for alternates. During the random selection process, every participant is assigned a random number used as a Selection ID for that batch. Primary participants are selected in sequence according to their Selection ID. When selections are complete, all remaining participants are eligible to be used as alternates. Alternates should also be selected in sequence according to their Selection ID.

1.14.3 Random Selection Expert

The Random Selection Expert will walk you through the steps necessary to perform one or more random selections. Please see the How to Run Randoms topic for a tutorial its usage.

1.14.4 Random Selection Profiles

1.14.4.1 Random Selection Profiles

- A random selection profile is a collection of settings which are used for random selections
- The Random Selection Profiles window allows the user to save multiple profiles of selection parameters
- Each configuration can have a different eligible pool, a variable substance panel, and unique selection methods and rates
- The parameters for any profile can be printed at any time.

The right side of Random Selection Configuration Dialog is divided into four separate pages; these are discussed in detail separately:

Companies Page Participant Filters Page Defaults Page Selection Rates Page Reports Page

Navigator Bar

Use the navigator bar to create a new profile or browse among the existing profiles.

Find a Profile

Click this button to select a profile from a sorted list.

Print Proof Lists

Click this button to print a proof listing of selection parameters or the eligible pool for the current profile. This is useful when creating or editing profiles.

Selection Expert

Click this button to display the Random Selection Expert. Open the expert from here if you want to perform a selection using the current profile. To perform selection on *multiple* profiles, close this window, and choose the Random Selection Expert from the Randoms menu.

Close

Click this button to close the Random Selection Profiles window and return to the main screen.

Profile Name

When adding a new record, the words *New Configuration* will appear in this field; type a new name to describe this profile. You can change this name at any time.

Comments

This free-form "memo" field can be used to store general information about the current selection profile.

1.14.4.2 Companies Page

This page is displayed by default when the Random Selection Profiles window is first opened. Use the components on this page to define which companies' participants will be eligible for selection under the current profile.

Test a Single Company

Only one company will be included in the random selection. The company selected does not have to be DrugPak's current company, but the company must exist, and its status must be active. When this option is selected, the Select Company button will be visible. If the company is incorrect, click the Select Company button and choose a company.

Select Multiple Companies

Multiple companies will be included in the random selection. The included companies are defined by a consortium. When this option is selected, a list of existing consortia will be displayed. You can select a consortium from the list, or you can click the "View/Edit Consortium" button to view, edit, select, or create a new consortium.

Select Company

This button is visible only when "Test Single Company" is chosen in the Company Options box. Click this button when you want to change the single company included in the current random selection configuration. This button will open the Find Company window. From the Find Company window, locate the company you wish to include in the configuration and click OK.

Consortium To Test

This list displays the consortium whose companies will be included in the random selection. Click the down-arrow located at the right of this field to activate the drop-down list. Select the consortium from this list to change the consortium displayed in the field. The total number of companies in the consortium is displayed below the Company Options group. If you wish to modify the companies included in a consortium, click the "View/Edit Consortium" button.

View/Edit Consortium

Click this button to open the Consortium window. You can then view, edit, select, or create a new consortium.

1.14.4.3 Participants Page

The Participant Filters Page of the Random Selection Profiles window offers several components to control which participants will be eligible for random selections. You can optionally use a set of lists to specify which Home Base, and/or Occupations, and/or Pool Groups will be included. If a participant does not meet all of the requirements specified on this page, then s/he will **not** be included in the eligible pool.

DOT Status

Choose to select *only* DOT participants, *only* non-DOT participants ("Exclude DOT"), all participants, regardless of DOT status ("Ignore DOT Status").

Include All Active [Dot/Non-DOT] Participants Marked "Include in Randoms" (wording of label is determined by which of the three options in the DOT status box has been chosen)

If this box is checked, additional selection criteria will not be required to determine participant eligibility. Participant Eligibility will be determined by

- · Belonging to an included company
- Value of the participants' Include in Randoms check box
- Value of the participants' DOT check box

If this box is unchecked, additional controls will appear to filter participants according to Home Base, Occupation, and/or Pool Group.

How Participant Filters Determine Eligibility

In order to be considered eligible for random selections, a participant's Home Base AND Occupation AND Pool Group must each be represented in its corresponding "Selected" lists (unless "All" is checked). If any of these values is in its corresponding "Not Selected" list box, then the participant will be excluded from the selection's eligible pool. This "AND, AND, AND" logic also extends to the participant's DOT status in comparison with the value selected in the DOT Selection Parameter radio group. If you want to include participants that have no home base, occupation, and/or pool group, the item labeled *BLANK* must be moved to the "Selected" list.

[Home Bases/Occupations/Pool Groups] Not Selected list box

These lists display the codes whose presence in a participant's testing information would exclude the participant from eligibility for selection. Use mouse clicks to highlight individual codes; hold the shift key while clicking codes to select consecutive codes; hold the Ctrl key while clicking codes to select nonconsecutive codes. Double-click a code to move it (and any other selected codes) to the Included codes lists.

[Home Bases/Occupations/Pool Groups] Selected list box

These lists display the codes whose presence in a participant's testing information would exclude the participant from eligibility for selection. Use mouse clicks to highlight individual codes; hold the shift key while clicking codes to select consecutive codes; hold the Ctrl key while clicking codes to select nonconsecutive codes. Double-click a company to move it (and any other selected codes) to the Excluded Codes list.

Include All Button >>

This button is located between two corresponding Not Selected and Selected Lists. Click this button [>>] to move all codes/contacts to the appropriate Selected List

Include Button >

This button is located between two corresponding Not Selected and Selected Lists. Click this button [>] to move selected codes/contacts to the appropriate Selected List.

Exclude All Button <<

This button is located between two corresponding Not Selected and Selected Lists. Click this button [<<] to move all codes/contacts to the appropriate Not Selected List.

Exclude Button <

This button is located between two corresponding Not Selected and Selected Lists. Click this button [<] to move selected codes/contacts to the appropriate Not Selected List.

All Check Box

Check this box to include all items in list, including those that have no home base/occupation/pool group (listed as *BLANK*). This is useful if you are going to add items to the Include All list in the future, but do not want to edit the profile each time.

1.14.4.4 Defaults Page

The Defaults page of the Random Selection Profiles window allows you to define information to be entered automatically in result record created with this random selection profile. None of these defaults are required. On this page you can also specify whether suggested collection dates should be randomly assigned during the random selection process.

Default values set here will override all defaults set in home bases, companies, and in the global settings.

Default Disposition

Enter an existing Disposition code to be automatically inserted into each Primary participant's test result record, or leave this field blank. Right-click or press F2 to display the Find Codes window.

Default Alcohol Test Collection Site

Enter an existing Collection Site code to be automatically inserted into any Alcohol result records created by the Random Selection Process. If you leave this field blank, an alternative default value may be obtained from the Home Base, Company, or the Results Options page of the Global Settings window. DrugPak will follow this order to populate the results' alcohol test collection site: profile > home base > company > global setting (i.e., it starts with profile, if the setting is blank, then it looks in the home base, etc.).

Default Drug Test Collection Site

Enter an existing Collection Site code to be automatically inserted into any Drug result records created by the Random Selection Process. If you leave this field blank, an alternative default value may be obtained from the Home Bases, Company file, or the Results Options page of the Global Settings window. DrugPak will follow this order to populate the result's drug test collection site: profile > home base > company > global setting (i.e., it starts with profile, if the setting is blank, then it looks in the home base, etc.).

Default Laboratory

Enter an existing Lab code to be automatically inserted into any Drug test result records created by the Random Selection Process. If you leave this field blank, an alternative default value may be obtained from the Home Bases, Company file, or the Results Options page of the Global Settings window. DrugPak will follow this order to populate the results' laboratory: profile > home base > company > global setting (i.e., it starts with profile, if the setting is blank, then it looks in the home base, etc.).

Default MRO

Select an MRO Name from the list (or enter a new name) to be automatically inserted into any Drug test result records created by the Random Selection Process. If you leave this field blank, an

alternative default value may be obtained from the Company or the Results Options page of the Global Settingswindow.DrugPak will follow this order to populate the results' MRO name: profile > company > global setting (i.e., it starts with profile, if the setting is blank, then it looks in the company, etc.).

Default DOT Panel

Select a default panel from the list to control what substances will be tested for DOT Participants' Drug tests. If you leave this field blank, an alternative default value may be obtained from the Company or the Results Options page of the Global Settings window. DrugPak will follow this order to populate the results' DOT substance panel: profile > company > global setting (i.e., it starts with profile, if the setting is blank, then it looks in the company, etc.).

Default Non-DOT Panel

Select a default panel from the list to control what substances will be tested for Non-DOT Participants' Drug tests. If you leave this field blank, an alternative default value may be obtained from the Company or the Results Options page of the Global Settings window. DrugPak will follow this order to populate the results' non-DOT substance panel: profile > company > global setting (i.e., it starts with profile, if the setting is blank, then it looks in the company, etc.).

Randomly Select Test Dates

If this box is checked, the random selection process will randomly generate suggested collection dates for each participant based upon the range defined by the Starting Date and Ending Date. These recommended dates will appear only on the Selected Participants audit trail, and optionally on the participants' Notification Letters. These dates will not appear anywhere in the Results File. The range of dates must be limited to one year.

Beginning Date

Enter the number of days after the selection is performed to start the range of dates.

Ending Date

Enter the number of days after the selection is performed to end the range of dates.

1.14.4.5 Selection Rates Page

The Selection Rates page holds the parameters that define when, how often, starting date, and what percentage or fixed number of the eligible pool will be picked as primary selections for Drugs and/or Alcohol.

- When selecting participant for combined Drug/Alcohol testing, selections are performed so as to
 minimize the number of participants selected. This means if you choose to select two participants
 for Drug testing, and one for Alcohol testing, then only two participants will be selected: One will be
 tested for Drugs and Alcohol, the other will be tested for Drugs only.
- You do not need to specify a selection rate for alternates every unselected participant in the pool is eligible for selection as an alternate.

Drug Test Selection Method

This setting defines how the value in the Drug Test Selection Rate will be interpreted. Choose either fixed number or percentage.

Drug Test Selection Rate

Type a value in the edit field or click the up/down arrow buttons at the right of the field to increment/decrement the displayed value by 1. The value displayed in this field may be interpreted as a fixed number or as a percentage, depending on the button selected in the Drug Test Selection Method radio group. If this value is a fixed number, then only whole numbers may be entered. If this

value is a percentage, then enter a percentage to the 1/100 of a percent.

Fixed Number Example: 25 = Test 25 participants for drugs Percentage Example: 12.5 = Test 12.50% of the pool for drugs

Per Selection

Choose this option to use the selection rate for this random selection.

Annually

Choose this option to use the selection rate for an entire year (e.g., using a rate of 50% annually and a frequency of quarterly will result in a selection of 12.5% (50 divided by 4)). To use this option, you must set a frequency.

Alcohol Test Selection Method

This setting defines how the value in the Alcohol Test Selection Rate will be interpreted. Choose either fixed number or percentage.

Alcohol Test Selection Rate

Type a value in the edit field or click the up/down arrow buttons at the right of the field to increment/decrement the displayed value by 1. The value displayed in this field may be interpreted as a fixed number or as a percentage, depending on the button selected in the Alcohol Test Selection Method radio group. If this value is a fixed number, then only whole numbers may be entered. If this value is a percentage, then enter a percentage to the 1/100 of a percent.

Fixed Number Example: 5 = Test 5 participants for alcohol Percentage Example: 5 = Select 5% of the pool for alcohol

Per Selection

Choose this option to use the selection rate for this random selection.

Annually

Choose this option to use the selection rate for an entire year (e.g., using a rate of 50% annually and a frequency of quarterly will result in a selection of 12.5% (50 divided by 4)). To use this option, you must set a frequency.

Automatically Adjust Selection Rates When There Is a Shortfall

This option will automatically adjust the selection rate by increasing the number of selected participants when previous selections have had a collection short-fall. When turning the option on the first item to set is the month and day when your "year" starts. The date is important because this feature will try to adjust to short-falls within a year.

When this option is turned on the random selection rate is automatically modified by a "rate of completion" logic. When you perform the first random selection in the year the selection simply uses the straight selection rate. As the second and subsequent selections are performed this feature causes the random selection expert to evaluate previous selections for this profile in the year to identify the completion rate. The selection rate is adjusted upward, assuming that current selections will have the same completion rate as the previous selections in the year.

The completion rate will never cause the selection rate to be lower than the set rate.

When used with an annual selection rate this feature will try to catch-up for previous selections. If the year is defined as starting in January but your first selection is in June then the selection rate will adjust upward in the assumption that you have to make up the tests that should have been selected in the first two quarters.

When the completion rate of the most recent batch is abnormally incomplete then the process will not include it in the evaluation. This is to accommodate frequent selections where a new selection might be performed before results for the previous selection have been entered.

In practice, this feature will automatically increase your collection rates. With that understanding, an important rule of any random selection is that you should intend to collect every test that is selected regardless of having met the testing rate target. The intention here is to help ensure compliance with the minimum rates, and it should be anticipated that using this feature will potentially select more participants than are necessary to meet the stated selection rate.

1.14.4.6 Reports Page

Overview

Choose which set of report settings to use for this random profile. There are two choices:

Use Default Audit Trail Settings

This option will use the default report settings. These settings can be modified by choosing Randoms > Audit Trail Default Options. Changing these settings will change the report settings for ALL profiles that use the default audit trail settings.

Use Custom Audit Trail Settings

This option will allow you to create a custom set of report settings that will be used for *only* this random selection profile. When this is chosen, a new window will appear that will let you choose which report(s) to include when generating a random using this profile. With the exception of the Selection Parameters report, there is a tab in the Random Selection Report Settings - {Profile Name} window for each report that displays additional report formatting options.

1.14.5 Audit Trail Default Options

1.14.5.1 Audit Trail Overview

The random selection audit trail is a series of reports designed to provide full disclosure of random selection parameters and results of the selection.

- A random selection profile can use either the default report options (Randoms > Audit Trail Default Options...) or its own set of options (found in the reports tab of the random selection profile window (Randoms > Random Selection Profiles)).
- The random selection audit trail reports can be printed when a random selection is performed and/or printed again later.

Audit Trail

Choose which report(s) to print. The following reports are available:

Eligible Pool list Selected Participants list Alternates list Notification Letters Certification Letters

1.14.5.2 Eligible Pool

The Eligible Pool report lists all participants who were eligible for random selection for a particular selection profile at a particular time.

The following options are available for this report:

Sort Companies by

Sort companies by company ID or company name.

Sort Participants by

Sort participants by participant ID, Social Security number, or alpha sort field.

Paging Options

Choose from three paging options:

No Special Paging Required

Choose this option if you don't need to start new pages each company or home base.

New Page on Company Change

Choose this option to start a new page for each company (if there are multiple companies)

New Page on Home Base Change

Choose this option to start a new page for each home base (if there are multiple home bases).

User "Other ID" as participant ID

Check this box to substitute the participant ID on the report with the participant's "Other ID."

SSN Cosmetics

Use this setting to change how the Social Security number will appear. There are several masking options. Masking is useful for obscuring part or all of a participant's Social Security number. (The global setting can be edited here: Preferences > Global Settings > Main Module > Participant Options > SSN Cosmetics.)

1.14.5.3 Selected Participants List

The Selected Participants report lists all participants who were initially selected for drug and/or alcohol testing for a particular random selection batch.

- This list does not include any alternates.
- Participants in this list are grouped by company and home base.

The following options are available for this report:

Sort Companies by

Sort companies by company ID or company name.

Sort Participants by

Sort by participants by participant ID, Social Security number, alpha sort field, or suggested

collection date (if the random selection profile was configured to randomly assign test dates).

Cluster Drug/Alcohol Selections

If this check box is on, then within each Home Base group, the participants will be subgrouped by substance. This feature is useful in combined drug/alcohol selections when you want to separate the participants who were selected for both drug and alcohol testing from the participants who were selected for drug testing only (or alcohol testing only).

Paging Options

Choose from three paging options:

No Special Paging Required

Choose this option if you don't need to start new pages each company or home base.

New Page on Company Change

Choose this option to start a new page for each company (if there are multiple companies)

New Page on Home Base Change

Choose this option to start a new page for each home base (if there are multiple home bases)

User "Other ID" as participant ID

Check this box to substitute the participant ID on the report with the participant's "Other ID."

SSN Cosmetics

Use this setting to change how the Social Security number will appear. There are several masking options that can be used to obscure all or part of a participant's Social Security number. (The global setting can be edited here: Preferences > Global Settings > Main Module > Participant Options > SSN Cosmetics.)

1.14.5.4 Alternates List

The alternates list displays participant(s) to test when participant(s) originally selected for a random batch is/are excused from testing.

- The alternates list always prints in selection ID order
- The selection ID is randomly generated for each alternate participant, so they can be selected in a predetermined order, without bias
- When selecting alternates, you must always select from the top of the list (lower numbers first), and work your way down

The following options are available for this report:

Grouping Options

The Alternates List offers some important grouping options which you must understand before printing this report.

No grouping

Select this option when your policy requires that an alternate be selected at random from the pool in its entirety. There is no guarantee that the alternate will be selected from the same company or home base as the excused participant.

Group by Company

Select this option when your policy requires or allows an alternate to be selected from the same company as the excused participant.

Group by Home Base

Select this option when your policy requires or allows an alternate to be selected from the same home base as the excused participant.

When grouping by company or home base, alternate participants will print for every group which had eligible participants in the random selection, even if no primary participants were selected from that group.

Sort Groups by

(This setting is available when Grouping Option is set to Group by Company or Group by Home Base.)

Choose to sort companies/home bases by ID/code or name/description.

Start each group on new page

(This setting is available when Grouping Option is set to Group by Company or Group by Home Base.)

Check this box to force each company/home base to start printing on a new page.

Only print for groups with primary selections

(This setting is available when Grouping Option is set to Group by Company or Group by Home Base) Check this box to print alternates only when there are primary selections in that particular company or home base.

Maximum Alternates to Print per Group

This option limits the number of alternate participants which will appear on the alternates list.

User "Other ID" as participant ID

Check this box to substitute the participant ID with the participant's "Other ID."

SSN Cosmetics

Use this setting to change how the Social Security number will appear. There are several masking options that can be used to obscure all or part of a participant's Social Security number. (The global setting can be edited here: Preferences > Global Settings > Main Module > Participant Options > SSN Cosmetics.)

1.14.5.5 Notification Letters

This report will print a one-page letter addressed to each participant selected in the random batch.

The following options are available for notification letters:

Print Notification Letters for

Primary Participants only

Letters for alternates will not be printed.

Alternate Participants only

This is useful when you need to print notification letters for specific alternates, rather than simply selecting them on an ad hoc basis. (*Please see the How Do I Print a Notification Letter for an Alternate topic*)

Primary and Alternate Participants

Two separate reports will print. See the "Alternate Participants only" option, above, for important advice.

Maximum Alternates to Print

(This setting is available only when you have selected to print either alternate notification letters only,

or both primary and alternate notification letters.)

This option limits the number of notification letters to print.

Sort Companies by

Choose to sort by code or description. (Notification letters for alternates will be printed in selection order.)

Sort Primary Participants by

Within each company, participants may be sorted by participant ID, Social Security number, alpha sort field, or suggested collection date (if the random selection profile was configured to randomly assign test dates).

Appointment Date Options

Choose from these options:

- No appointment date
- Suggested collection date. This will display a date if the profile that was used to generate this batch was configured to randomly assign test dates.
- Enter below: this option will enable a another setting that will allow you to enter a date.

Appointment Date

(This setting is available only when "Enter below..." is selected as the appointment date option) Enter desired appointment date.

Appointment Time

Optionally enter appointment time.

SSN Cosmetics

Use this setting to change how the Social Security number will appear. There are several masking options that can be used to obscure all or part of a participant's Social Security number. (The global setting can be edited here: Preferences > Global Settings > Main Module > Participant Options > SSN Cosmetics.)

Display Collection Site for Drug Tests

Check this box to display the default drug test collection site. Uncheck this box to leave the letters' collection site field blank.

Display Collection Site for Alcohol Tests

Check this box to display the default alcohol collection site. Uncheck this box to leave the letters' collection site field blank.

Display Participant Signature Line

Check this box to display a line for the participant to sign his or her name.

Display Print Date in Header

Check this box to display the notice date in the notification letter.

From Address

Optionally enter an address to appear in the From: portion of the notification letter.

1.14.5.6 Certification Letters

This report will print a one-page letter addressed to each company included in the selection. This letter can serve as a voucher for a company who was enrolled in the random selection, even if no participants from that company were selected.

The following option is available for certification letters:

Sort Companies by

Choose to sort the companies by ID or company name.

1.14.6 Reprint Selection Audit Trail

This option allows you to reprint reports from previously drawn random batches.

Single Batch Tab

Select the batch number by pressing the find button and selecting the batch number from the list, or by choosing a batch number from the menu. Then choose the reports by placing a check box beside each desired report.

Exclude Companies Whose Reports Are Generated

Check this box to exclude reports that have been configured for company contacts. For example, if a company has at least one contact with notification letters, and the notification letters report for that contact is configured to be generated(e-mail/fax/printer), when the "Exclude companies..." box is checked, *and* you choose to reprint all six possible random selection reports, the notification letters will *not* be printed, but the remaining five selected reports *will* be printed.

Modify Report Settings

If you do not want to use the report setting configured for the profile used to create the selected batch, press this button to modify the print settings

Use Profile's Report Settings

Press this button to the use the *current* report settings for the profile that was used to create the selected batch.

Multiple Batches Tab

Choose the desired batch numbers by entering the desired date range of the generation date(s) and pressing the Get Batches button. This will display and select all batches generated between those two dates. (The same date may be used for both start date and end date.) You may also deselect individual batches if you wish. Once you have selected the appropriate batches, you may press the Print button to print the reports.

- The reports will obey the report settings set for the profile used for each batch
- · When printing multiple batches, the reports will go directly to the printer

1.14.7 Random Selection Statistics

The Random Selection Statistics report is a useful tool for tracking your clients' compliance with your random drug and alcohol testing programs. These reports help you identify which companies have not met their quotas by sending selected employees for testing.

Print Program Analysis

You should not send this report to your clients, because it has information about multiple companies on the same page. The report is grouped in several levels:

- Single Company Randoms and Multi-Company Randoms are in separate groups
- Every Profile Name is grouped separately under group
- Every Random Batch is grouped separately under group
- Every company's performance for that batch is listed in a single line under group

This report will help you make sure that each individual batch is in compliance. If there is a shortfall, you will be able to tell how many results are incomplete (neither collected nor canceled), and how

many alternates you may need to select (to replace canceled results).

Print Location Analysis

This is a good report to send to your clients, because it has information which is separated by company or home base. Every location is printed on a separate page. Every batch is listed separately for that location. If the location has met its quota, then the report will demonstrate that. If the location has not met its quotas, then an extra page will print, listing the specific open result records.

Generation Dates From/To

Enter the beginning and ending batch generation dates for the period on which you want to report.

Single/Multiple Company Randoms

The choices are (both) Single- and Multi-Company Randoms, (only) Single-Company Randoms, and (only) Multi-Company Randoms.

- Choosing Single-Company Randoms will display a "company" item (that lets you choose a company), or a check box to include "All Companies"
- Choosing Multi-Company Randoms will display a "consortium" item (that lets you choose a consortium), or a check box to include "All Consortia"

All Profiles/Profile name

To include all profiles, check this box, otherwise, uncheck this box, and choose a profile from the drop-down list.

Batches in range/Batches included in report

Based on the choices made in the above items, batches will appear on the left side of the window (Batches in Ranges). You can "Add All" batches to the report, or "Add" individual batches to the report by pressing the appropriate button. Batches listed in the Batches in Range grid will *not* appear in the report(s), batches in the "Batches Included in Report" will.

All Batches in Range

Check this box to automatically include all batches in range on the report (essentially, this has the same effect as pressing the Add All >> button).

1.14.8 Select an Alternate

This feature allows you to select an alternate participant for testing. Once the appropriate alternate is identified, official random (RND) result records can be created. See the How to Select an Alternate topic for step-by-step instructions.

1.14.9 Cancel an Entire Batch

Sometimes it may be desirable to cancel an entire batch of test result records. This feature makes it possible to mark canceled all test records in a batch. Date of Record and user name are automatically inserted into the Internal Comments field for each canceled record.

Use this feature very carefully - there is no way to "uncancel" a batch.

Batch

Enter the batch number or use the find button to select a batch number whose records are to be canceled.

Date of Record

Enter the official date of record for this cancellation. This value will be automatically placed in the Collection Date field of each result record canceled by this process.

Today's Date

Click this button to insert the current system date into the Date of Record field.

Disposition

Enter the Disposition code to be automatically placed in the Disposition field of each result record canceled by this process.

Mark Canceled Tests "Unbillable"

Check this box if you wish to exclude tests canceled through this feature from invoices (relevant for DP Billing users only).

Comments

Enter any comments to be automatically placed in the Internal Comments field of each result record canceled by this process. These comments will not overwrite preexisting comments, but will be inserted into the top of the memo.

1.14.10 Cancel Invidual Result

This tool will allow the user to cancel test records for a participant that needs to have pending tests canceled. Normally this is only necessary if the participant has been terminated prior to collection, or if the participant will be on an extended leave of absence throughout the testing period.

By default, the company displayed will be the current company, and the participant will be the record currently displayed in the participants tab or the current participant for the currently displayed result if you are on the results tab. If the displayed participant is not the person for whom you want to cancel result(s), press the Select Participant button, and choose the appropriate participant.

Select Participant

Use this button to select the participant whose random test you wish to cancel.

Show Randoms in last # days

This number determines how far back (in days) to look for pending (i.e., status is unknown) random tests. By default, it is set to 365 days.

Reason for Cancellation

Enter the reason for canceling the random test(s). This field is required.

Mark Participant Terminated

Optionally mark participant terminated. (This will be disabled if the participant is already marked as terminated.)

Make Participant Ineligible for Future Random Selections

Optionally mark participant ineligible for future random selections. (This will be disabled if the participant is already marked ineligible for future random selections (i.e., the Include in Randoms box is unchecked.))

Select an Alternate

Optionally have the Select an Alternate window appear.

1.15 Tools Menu

1.15.1 Tools Menu Overview

Import Participants

This function will allow you to import lists of participant names into DrugPak.

Export:

Export to MROM Management

This feature allows you to export a file which can then be imported by MRO Management. This is useful for MROs who wish to send verified results to a TPA who also uses DrugPak and MRO Management. See the Export to MRO Management topic for full details.

Advanced Export

This feature to allows you to export data from DrugPak. If the data is going to be imported into a non-DrugPak product (e.g., Excel), please refer to the documentation for the target application for assistance with importing the DrugPak data. See the Advanced Export topic for full details.

Change Participant ID

This function allows you to change a participant's ID.

Change Company ID

This function allows you to change a company's ID.

Copy/Move Result (available only when the Results window is open)

Use this feature to copy a result from one participant to another. This is useful when you have assigned a result to the wrong participant, or added a participant and result into the wrong company. See the Copy Result topic for full details.

Note: You cannot copy a random test created by DrugPak (RND).

Update Participant Template

This function will set the items in the participant template to the values in the current participant record. Upon creating a new participant, these values will automatically be entered for you. The items included in the participant template are:

- Include in Randoms
- Occupation
- DOT Administration
- Home Base
- Pool Group
- Third Party
- · Observation Required
- Gender

Pack and Index

If you delete a record from a data file, the record is not actually deleted. Instead, each record is internally marked as having been deleted. It becomes unusable, but the record continues to take up physical space in the file. After many such deletions, your data files take up more space than they should and the performance of the system begins to degrade.

- To keep your system running at peak efficiency, pack and index your files periodically.
- Since this process rapidly accesses all of a company's records, no other users may be accessing this application.
- If you are running this software on a network, you should notify your coworkers when you are about to perform this procedure.

Purge Results by Date

After years of using the software, you may find it desirable to erase result records which you are no longer required to keep on file. This utility will allow you to automatically delete result records by date. Separate date cutoffs can be specified for Positive, Negative, and Canceled Alternate Result records. **Be careful with this feature. There is no way to UN-purge records.**

1.15.2 Importing Participants

Use the import wizard to import participant lists.

- The wizard will accept XLS (standard Excel workbook format) or CSV (comma separated values).
- You may import participants for one company or multiple companies
- Please see the How to Import Participants topic for step-by-step instructions

1.15.3 Export

1.15.3.1 Export to MRO Management

Use the Export to MRO Management function to prepare a text file of results which can be imported by the MRO Management software.

- You can control which companies' results will be exported, and which specific records are eligible for export
- When the process is complete, exported results will be marked as such so that they are not exported again

Company Scope

You can choose to export results for a single company, all companies, or a consortium. When exporting for a single company, the current company will automatically be chosen. To select a different company, press the find button and choose the desired company.

Examine Results Collected in ...#... Days

This number represents how many days back in time DrugPak should look for exportable results. For example, if the number is set to 30 days, DrugPak will not consider any result collected before 30 days prior to your computer's date.

Include previously exported results

Check this box to include test results that have already been exported (to MRO Management). Uncheck this box to exclude test result that have already been exported (to MRO Management).

Include results not-yet-collected

Check this box include test results that have no collection date. Uncheck this box to include *only* test results that have a collection date.

Additional Export (Filter) Conditions

This optional feature allows you to define additional criteria to determine which results are eligible to be exported.

Output Directory

Select a folder where you would like the exported results to be saved. The file's name will be in this format: MRORES_YYYY_HHMM_#####.TXT

Output Format

Three options are available:

- Simple Delimited File
- "Preferred" MRO Management Delimited Format (recommended for users who are exporting results for users who have MRO Management).
- Use Translation Engine this will allow you to use a specific translation layout

1.15.3.2 Advanced Export

You can use the advanced export feature to export data from any file in the DrugPak database to a new dBASE or ASCII text file.

- Standard filter controls allow you to control which records to export
- Flexible record definition controls allow you to control which fields to export, and in what sequence

File Definition tab

Select File

Use this list to choose the data file to be exported.

File Path

- This is the directory (location) and name of the file whose data will exported. This value is automatically completed for you when you pick an item from the Select File list (above).
- If the file from which you want to export is not available in the Select File list, press the folder icon at the right end of the File Path window. This will open a new window and display all DrugPak tables. (If you manually choose, the Select File field will become blank.)

Output Directory

This field indicates the folder on your computer or network where the exported data will be placed. Type in a value, or click on the folder button (connected to the right end of this input field) to browse for a folder.

File Name Model (available when Use Source File's Name check box is unchecked) This is the name of the file which will be created from the export (excluding the extension).

- The export process will use the file name model as a basis for the new file's name. If a file with that name already exists, then it will automatically increment the new file's name.
- When exporting to ASCII format, the destination file will have a .TXT extension
- When exporting to dBASE format, the destination will have a .DBF extension, and may have supporting files with .MDX and .DBT extensions

Use source file's name

Check this box to use the name of the source file (such as drivers, tests, company) as the name of the exported file

File Type

The Advanced Export process can export to dBASE or ASCII (text) files. If you export to a dBASE file, usually the output file has the same structure as the source file. However, there is a check box that allows you to "Remove unchecked fields." This means that if you choose not to export data for one field, then that entire column can be removed from the output file. If you choose to retain all fields in

the table, then you can choose to "Copy Indexes." Indexes are useful if the recipient of the exported dBASE file plans to look-up records or print reports directly on the exported table. Indexes should not be required if the user plans to merely import the data into another database.

Field Delimiter (available only when ASCII is chosen as File Type)

By default, the field delimiter is a comma.

Escape Character (available only when ASCII is chosen as File Type)

By default, the escape character is a "pipe" > (shift + \)

Linefeed Delimiter (available only when ASCII is chosen as File Type)

By default, the linefeed delimiter is a carrot ^ (shift + 6)

Quoted strings (available only when ASCII is chosen as File Type)

By default this box is checked. This is used to put quotes around any text that contains a field delimiter (such as a comma).

Field Control Page

This page allows you to specify which fields of data you want to write to the exported file. Place a check in the box next to each field that you want to export. Data in any unchecked field will *not* be exported. For ASCII (text) files, you also use the controls on this page to specify the order in which the corresponding fields appear in the source file (by selecting a field, and pressing the move up or move down buttons).

Field list

Every field in the file to be exported is displayed in this list. A descriptive field name is displayed, along with the formal name of the underlying data field.

Move Up

This button is visible only when exporting ASCII (text) files. Use this button to move the highlighted field up in the list.

Move down

This button is visible only when exporting ASCII (text) files. Use this button to move the highlighted field down in the list.

Record Selection Page

This page allows you to export only certain records from within the source file. It uses the standard Filter controls (see the Filter Panel topic for instructions on creating filters). The grid allows you to preview the records which will be eligible for exporting.

Once you are satisfied with the record selection, press the Export button.

1.15.4 Copy/Move Result

The Copy Result tool is useful when you have assigned a result to the wrong participant, or added a participant and result into the wrong company. You cannot copy a random test created by DrugPak (RND).

Destination Company

By default, the destination company will be the current company. However, you can select another company by choosing one from the drop-down menu or clicking the Find button.

Also Copy Participant

This check box will be enabled only if the destination company is different from the current company. Check this to create a new participant record in the destination company based on the result's current participant information. Uncheck this box to select an existing participant in the destination company to

receive the result.

Destination Participant

This field will be disabled if you are copying the result to another company, *and* you have chosen to also copy the participant. When this field is visible, you can type in a participant ID, or click on the Find button to select a participant from a list of participants in the destination company.

Delete original result when done

Check this box to delete the original copy of this result after the it is copied. Uncheck this box to keep the original result. Be careful when using this feature - it may be inappropriate for you to keep both the new and the old result, unless you make corrections to one or both results.

Delete original participant when done

This check box will be enabled only when the "Delete original result when done" box is checked. Check this box to remove original participant from the system after the result is moved. Uncheck this box to keep the original participant.

Display new result when done

Check this box to automatically switch companies (if necessary) and display the newly-copied result.

1.16 Preferences Menu

1.16.1 Preferences Menu Overview

User Preferences

These settings affect only the current user. Any user may modify the User Preferences.

Global Settings

These settings affect all users. Anyone may view, but only the MASTER user may modify the Global Settings.

1.16.2 User Preferences

1.16.2.1 Main Module

1.16.2.1.1 General Options

Show Pop-Up Hints check box

Check this box to make hints "pop-up" when you position your mouse over a control on the screen.

Show Hint After [] Milliseconds

This value controls how much time will pass between the moment you put your mouse over a "hintable" control, and when the hint actually appears. Default is 1000 milliseconds (1 second).

Hide Hint After [] Milliseconds

This value controls how long the hint will display, if you keep your mouse on top of the "hintable" control. Default is 15000 milliseconds (15 seconds)

Always Show Status Window

Check this box to make the status window always visible. The status window displays itself when necessary (during calculation, random generation, etc.) This is a diagnostic tool, and can usually be left off.

Show the Results Form on Startup

Check this box to automatically open and maximize the results page when opening DrugPak.

Main Page Layout options

The following check boxes control whether certain components on the main screen are visible:

- Show Hint Bar
- Show Filter Panel
- Show Status Bar

The following check boxes control the positioning of certain components on the screen:

- Tool Bar at Top
- Hint Bar at Top
- Navigator at Top
- · Status Bar at Top

The following check boxes control whether you can navigate to certain components on the screen by pressing the TAB key, or whether the component will be skipped by the tab order:

- Tab To Filter Panel
- · Tab to Sort Order List

1.16.2.1.2 Result Options

Tab Options

These check boxes control whether you can navigate to certain fields on the results screen by pressing the TAB key. When unchecked, the corresponding field is omitted from the tab order.

COC check box uses today's date

Check this box to automatically enter today's date when checking the COC box. Uncheck this box to be prompted for a date.

Default Test Class

When manually adding a new result, this is the substance type that will be used. You can change the substance type at any time (before saving the new result).

Breath-Alcohol Sensors

These check boxes control whether the results page should attempt to connect with an evidential alcohol-testing device. *This feature is provided for backward-compatibility only.*

1.16.2.1.3 Participant Options

These check boxes control whether you can navigate to certain fields on the participants screen by pressing the TAB key. When the box is unchecked, the corresponding field is omitted from the tab order.

1.16.2.1.4 Company Options

These check boxes control whether you can navigate to certain fields on the companies screen by pressing the TAB key. When unchecked, the corresponding field is omitted from the tab order.

1.16.2.1.5 Lookup Options

This page of the User Preferences window allows you to configure properties of the standard Find window, wherever it is used in the system.

Perform search after # milliseconds

Normally, when typing in search values, the Find grid will automatically synchronize to the record that most closely matches the search value entered. On slower systems, a noticeable delay can occur between each keystroke. This setting allows you to configure a delay for the Find grid to wait before attempting to synchronize the record. This can give you time to enter a complete search string before the system attempts to look up a record.

Examples:

1000 (1 second) 500 (1/2 second)

1.16.2.1.6 Optional Prompts

There are numerous warning messages throughout the software that experienced users grow tired of seeing. It is possible to tell the software not to show some of these messages. When a message supports this feature, a check box appears at the bottom of the message window "Do not show this message again." The Optional Prompts page of the User Preferences window allows you to configure the display settings for each individual message supported by this feature.

Some of these prompts are merely notification messages, but some provide the user one or more options. If you choose to suppress a prompt that offers several options, then a default option will be used whenever the prompt would otherwise have been displayed. You cannot turn off prompts from this page, rather the prompt must be viewed in context and the "Do not show this message again" box is checked. These settings only make it possible to turn the prompt back on after it has been turned off.

Are you sure you want to exit?

This prompt appears before closing the program.

Participant Template will be modified

This prompt appears when the user clicks the template button on the participants page.

Participant Template successfully updated

This prompt appears after the participant template has been updated.

Status is unknown: Mark all substances; results unknown?

This prompt appears when the user changes a result status to unknown, but the results for individual substances in the record *are* known.

Substance 1 removed from panel. Select a new panel?

This prompt appears when the user "blanks-out" the first substance in a panel of Drug test results. The system will assume that the user plans to remove all substances from the panel.

No data in report; Report window has been automatically closed.

This prompt appears when the user attempts to print a report to a window, but no records were found by the report. In order to prevent displaying a blank report window (which can be confusing to a user), this message can appear to explain what has happened.

Print Result Letter Directly to Printer

Check this box to skip the "Print in Window" feature. The report will go directly to printer, without any other user interaction required.

Did Result Letter Print Successfully?

This prompt appears after you send the result letter(s) to the printer.

Would you like to look up a batch?

This prompt asks you if you would like to look up a batch ID when selecting an Alternate. If this is unchecked, the Find Random Batch window will automatically appear when selecting an alternate.

1.16.2.1.7 Advanced Options

Delete Temp Tables

This check box should remain unchecked, unless you have a special need to access DrugPak's temporary work files after DrugPak is finished with them.

Always Track Status

This check box controls whether the status window records events even when it is not displayed. Unchecking this box may improve performance slightly.

Preferred Printer

Choose the printer that you use most often.

- [System Default Printer] refers to the default Windows printer
- Most reports have an option to override the preferred printer

1.16.2.2 Billing Module

Are you sure you want to exit?

This prompt appears before closing the program.

No data in report; Report window has been automatically closed.

This prompt appears when the user attempts to print a report to a window, but no records were found by the report. In order to prevent displaying a blank report window (which can be confusing to a user), this message can appear to explain what has happened.

1.16.2.3 **DP Live Module**

DP Live URL

Enter the DP Live URL using the *internal* IP address of the workstation or server that is running the web server (Falcon or IIS) hosting DP live. Entering the internal IP address will allow you to access DP Live from within your LAN. This is also important for troubleshooting - if *you* can access DP Live from this address, but your *users* cannot get to DP Live from the internet, then the problem lies outside of DrugPak Live. If this is the case, it is likely that there is a router configuration, firewall, web server, or other network problem. Please contact your IT staff for troubleshooting such issues.

Here is an example: https://192.168.0.51/bin/dplive.dll (Replace the 192.168.0.51 with internal IP address of the workstation or server that is running the web server (Falcon or IIS) hosting DP live.)

1.16.3 Global Settings

1.16.3.1 Main Module

1.16.3.1.1 General Options

These components appear on the General Options page of the Global Settings window:

Make Names Proper

Check this box to automatically capitalize the first letter of data fields representing proper names.

Zip Code Masking

Check this box to automatically punctuate ZIP codes in ####-### format.

Phone Masking

Check this box to automatically punctuate phone numbers in (###) ###-### format.

Prompt to Print Result Letters on Letterhead

Check this box to prompt you with a message reminding you to change the paper in your printer before and after printing Result Letters.

Prompt to Print Letter to Prospective Employer on Letterhead

Check this box to prompt you with a message reminding you to change the paper in your printer before and after printing the Letter to a Prospective Employer.

Prompt to Print Random Selection Notification Letters on Letterhead

Check this box to prompt you with a message reminding you to change the paper in your printer before and after printing Random Selection Notification Letters.

Prompt to Print Random Selection Certification Letters on Letterhead

Check this box to prompt you with a message reminding you to change the paper in your printer before and after printing Random Selection Certification Letters.

Disable business address when using letterhead

Check this box hide the business address (entered below) when printing any of the above reports on letterhead.

Verify databases when printing reports

This option is used to verify that the structure of the database has not changed since the report that you are printing was created. It is also used to cure error 534. *Uncheck this box, unless otherwise advised by Scanlon Associates Technical Support.*

Message Server Settings/Host Name or IP Address/Port

These functions have not yet been implemented.

1.16.3.1.2 Result Options

These components appear on the Result Options page of the Global Settings window. These options will help you streamline the data-entry and validation processes for records in the Results File.

Use Instant Audit During Data Entry

Check this box to check each result record for missing information every time you post a record in the Results page. See Preferences > Global Settings > Incomplete Tests to control what information DrugPak will require.

When you try to save changes to a result record, instant audit verification will warn you if important information is missing. Multiple messages may be displayed in the Instant Audit window. If no messages need to be displayed, the Instant Audit window is not shown. The Instant Audit window will typically allow you to proceed without correcting the problems.

Insert Collection Date when Excusing Test

Check this box to automatically insert the system date into the collection date field (if blank) when marking a test excused.

Mark Not Billable When Excusing Test

Check this box to automatically mark a test as not billable when setting the result status to excused.

Synchronize Collection and Notification Dates

Check this box to automatically set the collection date field and notification date field to the same value when (a) both fields are blank, and (b) a date is entered into either field.

Hide Notification Date/Time if not Required by Test Type

The "required" status of the notification date and notification is controlled by the test type (Codes window > Test Types > Report missing notification info in Result Records check box). Check this box (Hide notification...) to make the test type also control the visibility of these fields. Checking this box will cause the disappearance of the notification date and notification time fields for tests whose test type's "Report missing..." setting is unchecked (see Codes window > Test Types > Report missing notification info in Result Records).

Default Values for New Results

To save data entry time, you may enter default values for several items. When these default values are entered, DrugPak will automatically fill these items out for you when you create a new test. There are several levels of defaults - if DrugPak does not find a default at one level, it will look for a default value in the next level. If it does not find any default values, no value will be automatically entered in a new test result. See each item below to see where DrugPak looks for default values.

Default MRO Name

Select an MRO name to be automatically entered in new test records. When automatically entering the MRO name in a new result, DrugPak will look for a name in the following order:

- Non-RND tests: Company default MRO name (if available) > global default MRO name (this setting, if available)
- RND Tests: random profile default MRO name (if available) > company default MRO name (if available) > global default MRO name (this setting, if available)

Default DOT Substance Panel

Select the name of the Substance Panel that will be used in new DOT test result records. When automatically entering the DOT substance panel in a new result, DrugPak will look in the following order:

- Non-RND tests: company default DOT panel (if available) > global default DOT panel (this setting, if available)
- RND Tests: random profile default DOT panel (if available) > company default DOT panel (if available) > global default DOT panel (this setting, if available)

Default Non-DOT Substance Panel

Select the name of the Substance Panel that will be used in new non-DOT test result records. When automatically entering the non-DOT substance panel in a new result, DrugPak will look in the following order:

- Non-RND tests: company default non-DOT panel (if available) > global default non-DOT panel (this setting, if available)
- RND Tests: random profile default non-DOT panel (if available) > company default non-DOT panel (if available) > global default non-DOT panel (this setting, if available)

Default Drug Test Collection Site

Select the name of the collection site in this box that will be used in new drug test result records. When automatically entering the drug test collection site in a new result, DrugPak will look in the following order:

- Non-RND tests: home base default drug test collection site (if available) > company default drug tests collection site (if available) > global default drug test collection site (this setting, if available)
- RND Tests: random profile default drug test collection site (if available) > home base default drug test collection site (if available) > company default drug test collection site (if available) > global default drug test collection site (this setting, if available)

Default Alcohol Test Collection Site

Select the name of the collection site that will be used in new alcohol test result records. When automatically entering the alcohol test collection site in a new result, DrugPak will look in the following order:

- Non-RND tests: home base default alcohol test collection site (if available) > company default
 alcohol tests collection site (if available) > global default alcohol test collection site (this setting, if
 available)
- RND Tests: random profile default alcohol test collection site (if available) > home base default
 alcohol test collection site (if available) > company default alcohol test collection site (if available) >
 global default alcohol test collection site (this setting, if available)

Default Laboratory

Select the name of the laboratory that will be used in new test result records. When automatically entering the laboratory in a new result, DrugPak will look in the following order:

- Non-RND tests: home base default laboratory site (if available) > company default laboratory site (if available) > global default laboratory (this setting, if available)
- RND Tests: random profile default laboratory (if available) > home base default laboratory (if available) > company default laboratory (if available) > global default laboratory (this setting, if available)

Default Disposition

Enter the default disposition that will be used in new test result records. For RND tests, this setting will be used, unless overridden by a default disposition in a random profile.

"Observed" value is unknown (neither true nor false)

Check this box to set the collection observed value of new results to "Unknown" (displayed as a grayed out check mark). Uncheck this box to set the collection observed value of new results to off (i.e., not observed).

Auto-Generate Batch ID

Check this box to automatically create a batch ID for new tests result records.

- Batch ID will use the current day's date in the format of YYYYMMDD
- Tests created through random generation will *not* have the date format batch ID. Random tests will have a batch ID that reflects the random selection batch in which it was pulled, and will always start with the with R (R0001001, R0001002, R0001003, etc.)

1.16.3.1.3 Result Custom Fields

There are four custom date field, four custom sort fields, and four custom true/false fields. To use these custom fields, check the appropriate box, and give it an appropriate label (name). These fields (when enabled), will appear in the custom tab of the results window.

1.16.3.1.4 Participant Options

These components appear on the Participant Options page of the Global Settings window. These options will help you streamline the data-entry and validation processes for records in the Participants File.

Auto-Enter Termination Date

Check this box to automatically enter the system date in the termination date field when marking a participant terminated.

View Third-Party Features

"Third-Parties" represent a drug testing management consortium other than your own company. Third party features in the participants file let you track testing information for an employee who is enrolled in

a third party's random selection program.

- If you are an MRO or third party administrator, uncheck this box
- If you are a self-administering company, and some of your employees are members of another consortium, check this box

SSN Masking

This setting determines how the Social Security number/Social Insurance number is displayed on reports. For example, choosing XXX-XX-6789 will mask the first five digits of an SSN/SIN, and display the last four digits. This setting will be used, unless overridden in a specific report. (i.e., any report can use this global default, or its own SSN masking setting).

Data Entry

There are three custom date fields, two custom sort fields, and two custom true/false fields. To use these custom fields, check the appropriate box, and give it an appropriate label (name). These fields (when enabled), will appear in the participants window.

1.16.3.1.5 Company Options

These components appear on the Company Options page of the Global Settings window. These options will help you streamline the data-entry and validation processes for records in the Companies File.

Custom Fields

There are four custom date fields, four custom sort fields, and four custom true/false fields. These fields will appear in the custom fields tab of the companies window.

Defaults

Auto-Increment Company ID

Check this box to automatically assign sequential numbered company IDs when creating new companies. Uncheck this box to manually create company IDs when creating new companies.

Social Security Checking

Automatically check SSNs of *This company Only* or *All Companies* when creating a new company.

Use Participant Template

Check this box to automatically enable the "Use Participant Template" feature when entering new companies.

Auto-Increment Participant ID

Check this box to automatically enable the "Auto-Increment Participant ID" function when entering new companies.

Participant ID is SSN

Check this box to automatically enable the "Participant ID is SSN" function when entering new companies.

1.16.3.1.6 Contact Options

Custom Fields

There are four custom date filed, four custom sort fields, and four custom true/false fields. These fields will appear in the custom fields tab of the contacts window.

Synchronize phone number when synchronizing address

When changing the phone number in the Contact > Primary Contact tab of a location (company, collection site, lab, etc), checking this box will update the phone number of all contacts associated with that location.

Synchronize phone number when synchronizing address

When changing the fax number in the Contact > Primary Contact tab of a location (company, collection site, lab, etc), checking this box will update the fax number of all contacts associated with that location.

1.16.3.1.7 Incomplete Test Options

These options control what pieces of data are required for a test result to be considered complete. These options are used for both the incomplete test report and the instant audit. Any and all checked items are required items - when missing, test results with missing data will appear on the incomplete test report. These settings are also used when entering and modifying test results through the instant audit function. All the items are self-explanatory, except these three:

Honor Test Type Notification Date requirement

This check box works in conjunction with the "Report missing notification info in result records" setting for each test type (Codes window > Test Types). For example, if the test type RND's "Report missing notification info in result records" box is checked, AND the "Honor Test Type Notification date Requirement is checked, then all RND tests will require a notification date. Turn this check box off to override missing notification info requirements for all tests types.

Honor Test Type Notification Time requirement

This check box works in conjunction with the "Report missing notification info in result records" setting for each test type (Codes window > Test Types). For example, if the test type RND's "Report missing notification info in result records" box is checked, AND the "Honor Test Type Notification Time Requirement is checked, then all RND tests will require a notification time. Turn this check box off to override missing notification info requirements for all tests types.

Honor Test Type Collection Time requirement

This check box works in conjunction with the "Report missing notification info in result records" setting for each test type (Codes window > Test Types). For example, if the test type RND's "Report missing notification info in result records" box is checked, AND the "Honor Test Type Collection Time Requirement is checked, then all RND tests will require a collection time. Turn this check box off to override missing notification info requirements for all tests types.

1.16.3.1.8 Virtual Letterhead

This allows you to add an image of your letterhead, such as a logo, to nearly any DrugPak report. You will need a logo or letterhead image in the BMP, GIF, JPG (or JPEG) format. Copy that image onto your system, then go to Preferences > Global Settings > Main Module > Virtual Letterhead and check the box(es) for any or each report that you want to print with your letterhead. You can select all, or select just individual reports.

The image should be approximately 670 pixels wide and fewer than 200 pixels high.

Select Image Now

Once your electronic image is on a drive that ALL DrugPak users have access to. Click this button to select the image. Once you have selected an image, the system will ask you if you want to test the new letterhead. If you choose Yes, it will display a sample of your letterhead on the screen.

Test Current Letterhead

This allows you to test the letterhead to you screen, just as you did when you first selected the image.

Underlay Return Address

Check this box to allow the letterhead image and return address to occupy the same horizontal space.

1.16.3.1.9 Advanced Options

These advanced options should be changed only at the direction of Scanlon Associates support staff.

Connection Mode

Unless otherwise directed by Scanlon Associates support staff, Local or Remote should be selected.

Share data with other program

This option allows other database engines/applications to access DrugPak data. Due to the way the way the database engine locks files and records to allow access by other database engine/applications, this option could increase the risk of data corruption. **Uncheck** this box, unless otherwise directed by Scanlon Associates support staff.

1.16.3.1.10 Home Base Options

Custom Fields

There are four custom date filed, four custom sort fields, and four custom true/false fields. These fields will appear in the custom fields tab of the home base window.

1.16.3.1.11 Collection Site Options

Custom Fields

There are four custom date filed, four custom sort fields, and four custom true/false fields. These fields will appear in the custom fields tab of the collection site window.

1.16.3.1.12 Lab Options

Custom Fields

There are four custom date filed, four custom sort fields, and four custom true/false fields. These fields will appear in the custom fields tab of the laboratories window.

1.16.3.1.13 Third Party Options

Custom Fields

There are four custom date filed, four custom sort fields, and four custom true/false fields. These fields will appear in the custom fields tab of the third party window.

1.16.3.2 Billing Module

The Billing modules global settings options are available to user who have DP Billing installed and licensed.

1.16.3.2.1 General Options

Print Orders

This controls the sequence in which different types of charges appear on the invoice. Items with lower numbers will appear higher up on the invoice.

- These settings can be overridden for billee(s) by checking the billee(s)' "Ignore Print Order Field" box.
- If you do not want to differentiate between two items, enter identical print order values for those two print items.
- The value for miscellaneous charges is the default value that is used when creating a new miscellaneous charge, it is not the default print order for miscellaneous charges.

Charge the "Active Participant Administrative Fee" only if participant is "Included in Randoms"

When charging administrative fees for active participants (Billing > Administrative Charges > Active Participant), check this box to charge for **only** active participants marked as "Included in Randoms."

Charge the "Active Participant Administrative Fee" for DOT Participants only

When charging administrative fees for active participants (Billing > Administrative Charges > Active Participant), check this box to charge for **only** active DOT participants.

Charge for results with "Test Not Performed" status (specimen collected but not testable)

Check this box to be bill for tests whose status is "Test Not Performed."

Report an exception if Company "Account #" is missing

Check this box to be warned when the calculation process encounters a company whose account number is missing.

Report an exception if Collection Site charge is absent

Check this box to be warned when the calculation process encounters a test result that has no available collection site price schedule.

Bundle Lab Charges with Test Type charges (for billing profiles configured to "Summarize Line Items on Invoice")

Check this box to combine lab charges with test charges on a single line item. Uncheck this box to make lab charges appear as separate line item(s).

Bundle Collection Site charges with Test Type charges (for billing profiles configured to "Summarize Line Items on Invoice")

Check this box to combine collection site charges with test charges on a single line item. Uncheck this box to make lab charges appear as separate line item(s).

Always Calculate Supplemental Figures

Check this box to calculate supplemental figures when generating invoices. These figures include active participants, terminated participants, tests billed, total test on file, and appear when previewing the invoice line items.

Default Payment Terms

Enter the payment terms that will appear on invoices. This can be overridden for individual billees on the billee screen.

Default Invoice Message

Enter the invoice message that appears at the bottom of an invoice. This can be overridden for individual billees on the billee screen.

Repeat on Every Page

Check this box if you wish the invoice message to appear on every page. Uncheck this box to have the invoice message appear on only the first page of the invoice.

1.16.3.2.2 Return Address

Enter your company's address, as you would like it to appear in the return address area of the invoice. You may wish to leave this information blank if your return address is included in your Virtual Letterhead.

1.16.3.2.3 G/L Accounts

The G/L accounts page is divided into two tabs: chart of accounts and system account setup.

- Use the chart of accounts page to define your general ledger accounts
- Use the system account setup page to link different types of charges to these accounts

Setting up the general ledger chart of accounts is required only if you wish to export your invoice data to a third-party accounting software, or if you need to charge tax.

Chart of Accounts

Use this window to add sales tax and G/L account records that are used in conjunction with charges calculated by DP Billing.

- G/L export accounts typically include accounts receivable and one or more income accounts
- Accounts created in this window can be assigned to tax features or accounting categories in the System Account Setup page and can be associated with miscellaneous charges and billing rule sets

Account Number

Enter up to 10 alphanumeric characters to uniquely identify this account.

Account Description

Enter a description for the G/L account.

Represents a Tax Liability Account

When this box is checked, that G/L account is treated as a special account for tracking your tax liability. Two additional fields are provided to define the tax:

- Tax Rate: Enter a percentage value.
- Tax Description: Enter the value you would like displayed next to the tax item on the invoices.

Navigation Bar

Use these buttons to add, delete, or browse G/L account records.

Use Advanced G/L Accounting Features

Check this box to print G/L sales journal reports during the invoice calculation process, and to enable the system account setup features.

Require A/R Export Prior to Final Processing

Check this box when you need to export your invoice data to your accounting software.

Charge Taxes for Miscellaneous Charges Only

Check this box if you do need to charge taxes for your drug and alcohol testing services, but you sell other services or products which are not tax-exempt (in order to charge tax, at least one G/L account must be configured as a tax liability account, *and* the billing profile(s) must be configured to use a tax profile that includes a G/L account that is configured a tax liability account.

System Accounts Setup

Use this page to assign G/L accounts (assigned in the chart of accounts tab) to test fees, collection site fees, lab fees, and administrative fees.

1.16.3.2.4 Billee Defaults

The values assigned in this page will be used when creating *new* billees. See the billees topic for a further discussion of each item.

1.16.3.3 DP Live Module

1.16.3.3.1 DP Live Administrator

Show all tables in Security Settings

Uncheck this to display only the company, results, participants, home base tables in the permissions tab of the contacts window. To display all possible tables in a contact's permissions tab, check this box.

Add user filters to security profile filters

- For any one table, if this box is checked, the contact's filters will be combined with the security profile's filter. This will create a filter that is stricter than the security profile filter.
- For any one table, If this box is unchecked, then the contact's permission filters will be used instead of the security profile's filters. This could possibly expose records that the security profile filter would have hidden.

1.16.3.3.2 Display

Invisible field text

When a data field in a contact's permissions is marked "Invisible", the text entered in this field will appear instead of the actual data. The default value is <i>on-file</i>, which will appear as italicized text (on-file). However, you can choose to leave this value blank, in which case nothing will be displayed, or you can specify some other value to display.

Participant ID Display

This option controls what information will be displayed next to "Participant ID". Rather than showing the participant ID, you can choose to display the participant name, SSN, or Other ID. In general, the Social Security number and name are already displayed wherever the participant ID is provided, so in general you should probably set this value to be either "Participant ID" or "OTHER_ID" (if the Other ID is meaningful to your client). Otherwise, users will see either the participant ID and/or SSN displayed twice.

Report Unknown Fields (Advanced Users Only)

We recommend that you leave this box checked. If an improper data field reference is entered in an HTML file, then an error will be displayed in the browser indicating that there was a problem parsing the template. If this box is unchecked, then the DP Live will ignore invalid data fields.

Report EUnknownTag (Advanced Users Only)

We recommend that you leave this box checked. If an improper custom tag is entered in an HTML file, then an error will be displayed in the browser indicating that there was a problem parsing the template. If this box is unchecked, then the DP Live will ignore invalid tags.

Disable Read-Only Input Fields

Check this box if you would like input fields to be disabled (appear grayed-out) when the user only has read-only access to that data field. Uncheck this box to make read-only data fields appear like plain text on the screen (no input field).

Strict Home Base Filtering

Check this box to prevent users from seeing participants that are not assigned to a home base if a contact's permission settings have a filter on the home base file, and there is no filter on the participants file. Uncheck box to allow users to see participants that are not assigned to any home

base, even if a filter has been set in the home base file.

If DP Live global settings have been changed, DP Live will have to be refreshed to reflect the changes (DP Live Administrator > Remote Admin Menu > Refresh DP Live)

1.16.3.3.3 Remote/Auto Admin

Session Control > Auto-Logout after [] minutes of inactivity

When a user logs onto the system, a session is created that authorizes them to use DP Live for a while, without having to log back in. Every time they make a request to DP Live, DP Live will extend this time period. If they do not manually log-off the system, eventually DP Live will automatically log them out, for security reasons, and in order to regain a modicum of system resources. The recommended setting is 10 minutes.

Session Control > Use IP-Matching in session control

This option blocks DP Live users when the address of that user changes during a DP Live session. While this is a valid and useful security measure, many DP Live users could be blocked.

Auto-Administration > Purge and Pack at

Specify the time (usually in the early morning) when you would like DP Live to automatically pack and re-index DP Live tables. The DP Live web service will be temporarily unavailable while this process is running.

Auto-Administration > Suspend nightly from ##:## and ##:##

Specify the time range during which you would like DP Live to be automatically suspended. You may wish to coordinate this time with your automatic data backup operations. If a visitor tries to access during this time period, then they will receive a message informing them that the database is being updated, and at what time the service is scheduled to resume. This time range does not need to overlap the auto-pack time.

Remote-Administration > Remote administration password

This password is used to tell DP Live that you are authorized to see the Remote Administration menu through the DP Live interface. The Remote Administration menu allows you to perform special actions in DP Live, through your web browser. (This password is randomly generated when the system is initialized, in order to prevent other DP Live users from exploiting a known default password.)

Remote-Administration > Secure RA IP Addresses

Any time you connect to DP Live from one of these IP addresses, the Remote Administration menu will be shown by default. You are NOT required to enter any IP addresses here; you can always access the Remote Administration menu through the DP Live Tools Menu. However, you may wish to enter your various LAN IP addresses, if you connect to DP Live through your own LAN, or your home IP address, if you often work from home and have a static IP address there.

If DP Live global settings have been changed, DP Live will have to be refreshed to reflect the changes (DP Live Administrator > Remote Admin Menu > Refresh DP Live)

1.16.3.3.4 Skin Options

Branding

Application Name

This option allows you to give a you DP Live service a name. By default, the name is "Drug Testing Access System." Enter the desired name in the empty box, press the apply button, and refresh DP

Live. This name should appear in the title bar of the visitors web browser.

Banner Logo

When chosen, this logo will be displayed across all DP Live pages. If desired, choose an image (JPG, JPEG, or GIF), press the Apply button, and refresh DP Live. This image will appear in the top left portion of web pages.

Main Background Image

This image, if used, will appear behind the main DP Live frame.

- Refreshing DP Live is required for this image to appear (DP Live Administrator > Remote Admin > Refresh DP Live)
- To remove this image, clear out the image name box, and press the Apply button, and refresh DP Live

Page Background Image

This image, if used, will appear in the main content frame of your DP Live site (below the menu and to the right of the status window).

- Refreshing DP Live is required for this image to appear (DP Live Administrator > Remote Admin > Refresh DP Live)
- To remove this image, clear out the image name box, and press the Apply button, and refresh DP Live

Colors

These settings will control the color of many elements of your DP Live pages. See the hints displayed in the right-hand panel of each color setting for more information on the use of each color setting.

Contact Information

Enter the contact information that will appear in the "Contact Us" page on your DP Live site. The number entered in the primary phone # field will also appear below the DP Live service name at the top of the page (below the name assigned in Branding > Application Name - see above).

Document Manager (these settings are only relevant for Document manager users)

Hide Alcohol Clip

If Show Result Clip box is checked, and you wish to hide the document clip for just alcohol results (but not drug results), check this box.

Show Participant Clip

Check this box to display a paper clip icon next to participant records that have documents linked to them.

Show Result Clip

Check this box to display a paper clip icon next to result records that have documents linked to them.

MRO Signature

Show MRO Signature

This check box is required to display an MRO's signature under *any* circumstances (e.g., checking *just* the box for Show Signature for DOT will not display the MRO signature for DOT tests unless and until the Show MRO Signature box is *also* checked.) Once this box is checked you can choose any or all test categories for which the MRO's signature should be displayed (DOT, non-DOT, Excused, etc.)

Miscellaneous Options

Each of these options has a brief description underneath the check box explaining its function.

If DP Live global settings have been changed, DP Live will have to be refreshed to reflect the changes (DP Live Administrator > Remote Admin Menu > Refresh DP Live)

1.16.3.3.5 Log

The log page settings control the behavior of the DP Live logging. Most of these settings are also configured through the Startup Expert, with the exception of "Detailed Log" and "Retain Events for... Days" (see below for more information).

Log Every Request

Check this box to have DP Live record an event in the activity log every time someone requests a page. The log will track the user name and current company (if logged in), IP address, date / time, URL path, and query parameters.

Log Errors

Check this box to have DP Live record an event in the activity log every time the user receives an error message. This option does not refer exclusively to system malfunction errors (although it may), but also to syntactic errors (such as an improperly formatted request), or insufficient rights errors (if the user attempts to perform an action which their security profile or permission level (see Contact > Permissions) forbids).

Track Database Updates

Here is a sample log:

Check this box to have DP Live record an event in the activity log every time the user changes a record in the database. In addition to standard log data, the log will record the table name, key information identifying the record, a list of the updated fields, the initial field values, and the new field values, and the action performed (ADD / DELETE / MODIFY). Every changed record will receive its own record in the activity log.

Log Participant updates in NOTES memo

Check this box to have all participant modifications logged to the participant's notes field. More recent changes are logged at the top of the notes field.

Detailed Log (not recommended)

It is recommended that this box remain unchecked. Check this box to store the entire web page that

was sent to the client, in each log entry. Enabling this feature on will cause your log to grow very large very fast.

Retain events for [#] Days

Specify how long you would like to retain events in the activity log. The log is automatically purged nightly.

If DP Live global settings have been changed, DP Live will have to be refreshed to reflect the changes (DP Live Administrator > Remote Admin Menu > Refresh DP Live)

1.16.3.3.6 E-mail

SMTP Server

Enter the name or IP address of your outgoing (SMTP) mail server. If you are not sure what it is, please contact your IT staff or internet service provider. DP Live will use this server to relay e-mail requests from visitors, such as requests for an alternate.

User ID

Enter a valid User ID (used to contact the SMTP server).

Password

Enter the password for the above User ID.

To Address

Enter the address of the person that will receive e-mail from DP Live (e.g., a request for an alternate).

To Name

Enter either the real name of the person you entered in the "To Address" box, or leave as "DP Live Administrator."

From Address

Enter a valid e-mail address (you can use the address above in the "To Address" box.) When e-mail arrives from a DP Live user, this is the address that will appear in the "From:" field of the e-mail message.

From Name

You can leave this as DP Live AutoMailer, since the mail is coming from DP Live, but possibly originating from one of many different users.

If DP Live global settings have been changed, DP Live will have to be refreshed to reflect the changes (DP Live Administrator > Remote Admin Menu > Refresh DP Live)

1.17 Filters

1.17.1 Filter Panel

The Filter Panel holds several controls which help you manage filter on the main screen. This helps make it easy to work with small subsets of your data. You can create new filters, and select from a list of previously created filters. Each window (participants, results, companies, etc.) has its own panel. (Filters can be enabled through Preferences > Users Preferences > General Options Show Filter Panel.)

There are two ways to view filters: manually-entered filters, and saved filters. Clicking on the icon at the left end of the filter box will toggle between the two views.

Filter list box

If there is no text is displayed or [No Filter] is displayed in the Filter list box, then the current dataset is not filtered. You can type directly into the Filter list box to create an expression which will limit which records are visible on the main screen. See Filters Overview for general syntax guidelines.

When a dataset is filtered, the Status Bar's (double-click for) Record Count window will show how many records meet the filter criteria. When you browse through the file, you will see only records which meet the filter criteria.

Click the down-arrow button at the right of the filter list box (or press Alt-Down) to display a list of previously used filters. The filter list box stores up to 20 filters at a time. It keeps the most recent filters and discards old filters.

Add Filter Condition button

Click this button to display the Add Filter Condition window. The Add Filter Condition window will help you construct basic filter expressions.

Clear Filter button

This will remove the filter from the current dataset. Clicking this button has the same effect as manually deleting the text from the Filter list.

Additional filter options: when in the manually-entered filters mode, the > button will allow you to save or clear the current filter. When saving the filter, you will be asked to name the filter, and to decide if the filter is visible by only the currently-logged in DrugPak users, or by all DrugPak users. When in the saved filter mode, the > button will allow you to clear, rename, rename, or delete the current filter.

1.17.2 Add Filter Condition dialog

This window can help you construct a filter expression. It is very helpful when you do not know the names of the underlying data fields which you want to filter on. It is also useful for people who are unfamiliar with the filter syntax. It can be used wherever filter expressions are entered. A very simple interface helps you complete the three parts of the filter expression: Field Name, Operator, and Value

After you complete the three components of the filter expression, click the OK button to accept the filter. If you use the Add Filter Condition window to enhance an existing filter, when you are done building the new condition it will automatically be appended to the previous filter, using the AND conjunction. More sophisticated compound filters can be designed manually (see Filters Overview for syntax guidelines).

If you want to completely replace an existing filter, then you should clear the existing filter before displaying this window. Otherwise, the condition you create here will be added onto the existing filter.

Advanced users may prefer to skip using this window, instead typing their filter directly in the filter list.

Field Name list box

Select the field you would like to build a condition around. All the field names for the current dataset

are available in this list (except for Memo fields).

Operator list box

Select the operation you would like to test the field with. The operator serves as the actual condition linking the Field with the Value. Possible operators include:

Is any value

Is empty

Is not empty

Is greater than

Is less than

Is greater than or equal to

Is less than or equal to

Is not equal to

Contains

Value

Enter the value you are using the base your filter condition upon. This edit box behaves differently depending upon what type of field you are operating on:

Character ["string"] field

Type the value directly into the edit box. Uppercase/lowercase does not make a difference, except that lowercase letters will not take up as much space on-screen.

Boolean (True/False) field

Click on the edit box to switch its value between TRUE and FALSE

Date field

Click on the edit box to display the calendar component.

New Condition

As you enter the components of the new filter condition, the actual condition will be displayed in the edit box at the bottom of the screen.

1.17.3 Creating Filters

A filter is a statement which may be true or false about a given record. When a filter is applied to a dataset, only those records that meet a filter's conditions are available to an application. DrugPak allows you to apply filters to your databases under numerous circumstances, such as when browsing records on the main screen, or performing batch operations. Filters are very useful, giving you quick access to a limited set of data.

This topic will provide a basic explanation of how to construct custom filters. In the beginning it is advisable to use the Add Filter Condition window. You can typically load the

Add Filter Condition window by clicking a special button located near the place where you would type in a filter. The Add Filter Condition window will help you become familiar with the field names and will prevent typographical errors.

Basic Filter Expressions

The most basic filter expression has three components: the Field, the Operator, and the Value. These three components are combined into a single expression that can be evaluated as being True or False. In the following example, **STATE** is the field, **=** is the operator, and **PA** is the value.

Example: STATE = 'PA'

The above expression as a whole may evaluate to either true or false. That is to say, in some records STATE may be 'PA', but in other records, STATE will be some other value. A table filtered with the above expression would only show records for which STATE is equal to 'PA'.

Field

The field parameter in a filter expression is the actual name of a column in the database. The field name often will be an abbreviated form of the conventional "field title." For example, to refer to the field titled "Collection Date," you would need to know that the underlying column name is actually DATECOLLCT. The Add Filter Condition window will help you bridge this gap, because it shows field names and titles side-by-side. Field names can be written in uppercase or lowercase letters.

Example: datecollct = null

Example: DATECOLLCT = NULL

Operator

If an expression were a sentence, the Operator would be the Verb. The operator defines how the Field relates to the Value. The Value is the middle component in an expression. Filter operators are common mathematical symbols you should recognize.

Equal toNot Equal toGreater thanLess than

>= Greater than or Equal to <= Less than or Equal to

Value

The Value is the last part of an expression. Different types of fields store different types of data. Each data type's values may be expressed in a slightly different way. The Add Filter Condition window will help by automatically using the appropriate conventions for expressing values of different data types.

Boolean fields (True/False fields)

Boolean fields store a value of TRUE, FALSE, or NULL (blank). Some processes may treat a null Boolean field as if it were False, but filters will distinguish between null and false. Boolean values can be entered in an expression several ways:

TRUE, true, 'TRUE', 'true'

Example: terminated = true

FALSE, false, 'FALSE', 'false'

Example: RES LTTR = false

Character fields (String fields)

Character fields store text, and are limited to a predefined length. If a filter expression's value exceeds the capacity of the specified field, then an exception will be raised. Character [string] values are enclosed in apostrophes ('single quotes').

Example: NAME = 'John'

Most filter conditions will be case-insensitive, meaning that the following example is equivalent to the prior example:

Example: NAME = 'JOHN'

Please note that filters using the operators < , > , <= , or >= may be case-sensitive. It is recommended to always use uppercase strings as values when not using the = operator. See "Character Case in Filter Expressions," below.

You can also use the * wild card to look for records whose field begins with a certain series of letters.

xample: NAME = 'J*'

The above example would return all records whose NAME field begins with the letter J.

Numeric fields

Numeric fields may be integer fields or "float" fields. Integer fields can only store whole numbers,

but float fields can store fractional values. Each field may have a different precision and maximum/minimum value. If you violate the range of acceptable values for a certain type, then an exception will be raised. Express numeric values as numeric characters, with no quotations or other delimiters.

Example: INVOICE = 1001 Example: RATE = 12.5

Fractional values between -1 and 1 require a leading zero prior to the decimal:

Example: RATE >= 0.5

Date fields

Date fields store date values. The dates are stored as a floating-point value, but this value is converted to and from MM/DD/YYYY format for display and input. Express date values in 'MM/DD/YYYY' format, enclosed in apostrophes ('single quotes').

Example: DATECOLLCT > '01/01/1999'

Technically you can omit the leading zeros in month and day values, as follows:

Example: DATECOLLCT > '1/1/1999'

However, you should always include a four-digit year. If you use a two digit year, the database engine may not interpret the "implied" century the same way you intend. Typically, it will use the same century as the system date, but this may vary.

Memo fields

Memo fields store up to 32-Kilobytes of text. These are special fields and *cannot be used in filter expressions*.

Defining Multiple Conditions

The most basic filters are composed of a single condition. However, it is possible to combine multiple conditions using the conjunctions **AND** and/or **OR**.

AND

When the AND conjunction is used to join two conditions together, then **both** conditions must evaluate to TRUE for the entire expression to be TRUE. If either condition is FALSE then the entire expression is FALSE

Example: SSN= NULL and TERMINATED=False

You can easily continue adding AND conditions to one another, without confusion:

Example: SSN= NULL and TERMINATED=False and ALPHA_SORT>'A' and OCCUPATION='DRV'

OR

When the OR conjunction is used to join two conditions together, then *either* condition may evaluate to TRUE for the entire expression to be TRUE.

Example: OCCUPATION= 'DRV' or OCCUPATION='PLT'

You can easily continue adding OR conditions to one another, without confusion:

Example: OCCUPATION= 'DRV' or OCCUPATION='PLT' or RANDSEL=False or POOL_GRP='ALT'

Compound Conditions, and Parentheses

When you take many conditions, and combine them together with a mixture of AND and OR conditions, then you have a compound condition. The sequence of ANDs and ORs becomes significant, and you must use parentheses to isolate important conditions. Using parentheses forces the database engine to evaluate groups of conditions separately from the rest of the entire expression.

Example: LAST_DATE<> Null and (TERMINATED=False or RANDSEL=False)

In the above example, the LAST_DATE field must have a value. Additionally, either TERMINATED or RANDSEL must be false. The parentheses around the OR condition lets the database engine know that the OR condition is a single unit that should be evaluated separately. Otherwise:

Example: LAST_DATE<> Null and TERMINATED=False or RandSel=False

The lack of parentheses the above example would allow this expression to evaluate to true, as long as RANDSEL=False.

Spacing in Filter Expressions

Within a single expression, you do not need to separate the Field, Operator, and Value with spaces. They can all "run together," but you may prefer to use spaces for readability and editability. The following expressions are functionally identical:

Example: DOT=True

Example: DOT = True

However, you must separate AND and OR conjunctions from the rest of the expression by spaces. Unless the words AND or OR have a space on both sides, the database engine will not recognize them.

Bad Example: DOT=true and occupation='DRV'
Good Example: DOT=true and occupation='DRV'

Character Case in Filter Expressions

The advantage of uppercase characters is that they are usually easier to read. The advantage in writing in lowercase is that lowercase characters take up less space in the filter edit; with longer filters, this becomes more apparent. In some circumstances, character case in Values will affect the filter's "output."

Field Name

Field Names can be written in uppercase or lowercase.

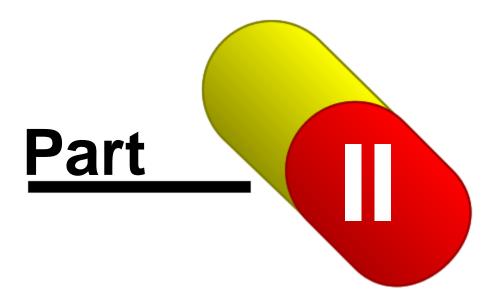
Value

In general, filter values following an equal sign (=) are case-insensitive, meaning the value can be uppercase or lowercase without affecting the filter's output.

However, in many indexes, lowercase letters all come "after" the uppercase letters. This only appears to affect operations containing the < and > symbols. That means that sometimes 'A' < 'a', and even 'Z' < 'a'. Most of the time, DrugPak codes will be UPPERCASE, and you can safely use UPPERCASE values in most of your string expressions.

AND and OR

These conjunctions can be written in either uppercase or lowercase.



2 DrugPak Informer

2.1 Getting Started with DP Informer

DrugPak Informer integrates with DrugPak to automatically distribute reports via e-mail and/or fax. This section introduces the basic concepts involved in Informer.

How does Informer work?

There are two parts to Informer - the report generator, and the transmission center.

Report Generator:

- The report generation process prepares the reports for delivery, and places them in the task list. Once the reports are in the task list, they are ready to be sent.
- The report generator includes settings that allow you to decide which report(s) to generate and for whom
- Other Informer features include communication settings, contact/recipient settings, and a task list

Transmission Center:

The Transmission Center is a separate program which sends the reports in the task list (i.e., reports that have been generated). It is typically run from your server, but can be run on any DrugPak workstation (to send faxes, a workstation that runs the Transmission Center must have a fax modem (installed and configured)).

There are several basic steps involved in the use of Informer:

- 1. Configure communication settings (fax and/or e-mail settings)
- 2. Create/manage contacts and their reports (the people who receive the reports, and their report settings)
- 3. Configure task options (file format, cover pages, and (optional) encryption)
- 4. Generate reports
- 5. Transmit reports

Once the settings, reports and contacts are configured, only steps 4 and 5 are necessary.

2.2 Communication Settings

Communication settings are specific to a workstation. That means that each workstation that is to transmit e-mail needs to have e-mail settings configured, and each workstation that is to send faxes needs (1) a fax modem, and (2) to have fax settings configured. If a workstation is not going to send e-mail or faxes, these settings are not required.

- Workstations that are not configured to send faxes and e-mail can still generate reports (for a different workstation to transmit)
- Communication Settings window can be accessed by choosing Preferences > Communications Settings

Fax Options

The DP Informer Suite needs to have a fax modem recognized by Windows in order to transmit faxes. (Please contact your IT staff for assistance in installing and configuring your fax modem(s) - Scanlon Associates does not offer hardware installation assistance)

To configure a workstation to send faxes:

1. Press the Add button, and select the appropriate modem from the list (If no modem is listed, please contact your IT staff for assistance in installing and configuring your fax modem(s) - Scanlon

Associates does not offer hardware installation assistance.) Repeat, if you have multiple fax modems.

- 2. Enter your area code in the "Your area code" field
- 3. If necessary, enter the code to be dialed after a long distance phone number. See below for more about the long distance dialing suffix.
- 4. If necessary, enable the 10-digit dialing, and enter the local area code(s). Consult your phone company as to which local area codes require 10-digit dialing.
- 5. Optionally, if you wish to use the test mode of the Transmission Center (to test the system before sending live data), enter your fax number (including area code). Test faxes will be sent only when the Transmission Center or an individual task is in test mode.

Add button

Click this button to select your fax modem from a list of communication devices registered with Windows.

Remove button

Select a modem, and click this button to remove fax modem from a list of current Informer modems

Device Configuration button

Click this button to modify the configuration of the selected modem. This is the same as modifying the modem properties via the Windows Control Panel Modems window box.

Fax Class

Unless otherwise directed, leave this setting at "Auto-Detect."

Modem Initialization String

Unless otherwise directed, leave this box blank.

Long Distance Dialing Suffix

Leave this box blank, unless your phone system requires a code to place long distance calls. If a code is required, place it in this box. This number will be dialed *after* the phone number.

Fax Speed

Set this option to 14400 to decrease call time. Set this option to 9600 to solve connection problems.

Dial Prefix for Outside Line

This dial prefix will be dialed before anything else, every time an outgoing fax is to be dialed. If your office phone system requires you to dial a particular number (or numbers) to access an outside line, enter them here. You may also wish to suspend call waiting (enter *70) or other features of your phone line. Enter a comma (,) to insert a pause during the dial sequence.

Your Area Code

Enter your area code. This number is used to distinguish between local and long-distance calls. If a phone number's area code is the same as this value, then the area code is omitted from the dial sequence. If a phone number's area code differs from this value, then a 1 will be automatically inserted before the area code in the dial sequence.

You may be required to dial 1 before a 7-digit phone number even though the recipient's fax number shares your area code. In this case, you will need to add a 1 to the fax number for that particular contact (Contact window > Task Options > Fax Options > Dial Prefix).

10-Digit Dialing

Check this box to include the area code, but not a 1 when dialing a phone number in your local area code. When this box is checked, the Local Area Codes button is made available. Click this button to open an additional window to enter additional area codes that are considered "local" to you. If your

phone company requires that there are some numbers that you dial 7 digits, some that you dial 10 digits and others that are 11 digits then you cannot use this feature. To accommodate situations such as this use the Dial Prefix field in the Contact | Task Options to customize the fax number used for that contact.

Send Test Fax To

Enter the area code and phone number to which you would like to send test transmissions. *Test faxes will be sent only when the Transmission Center or an individual task is in test mode or when an individual task is set to test mode.*

Sender ID for Header

Enter your fax number (up to 20 characters). This value will replace the \$I Replacement Tag in the fax header. A fax device can identify itself to another fax device with a 20 character name, called the station ID. The Class 1, Class 2, and Class 2.0 specifications indicate that the station ID should contain just a phone number; therefore they limit it to just the digits 0 through 9 and space. However, the station ID is frequently used to store an alphabetic name. Most fax modems support this convention by allowing upper and lower case letters, as well as other special characters in the station ID. This can cause problems for some fax machines, though, since they cannot print these characters.

Header Text

Enter the text which should appear at the top of every fax page. Use Replacement Tags to create a dynamic header with every transmission.

Example: Results from Your Drug Testing Administrator [\$I] -- \$D \$T Page \$P of \$N

Cover Page File

Select the file that contains the default cover page message

- Acceptable file formats include plain text (TXT) and or Fax Cover Page format (FCP)
- You can use Replacement Tags to create a cover page that changes dynamically with every transmission. A sample cover page file using replacement tags is provided in ...\INFORMER\MESSAGES\FAX.TXT
- The body message file can be overridden in individual contacts (Contact window > Task Options > E-mail Options > Cover File)

Header Font

Click this button to select a font for header text. There is an upper limit on the size of the font, but this limit is not typically reached unless a very large font is used (e.g. greater than 72 pt.). If the limit is exceeded, then an error will occur when the Transmission Center attempts to generate the cover page.

Cover Font

Click this button to select a font for cover page text. It is not possible to use multiple fonts or font styles within the same cover page.

E-mail Options

In order to transmit e-mail using the DP Informer, you must already have a SMTP-compatible e-mail account established with an internet service provider (ISP). The workstation must be able to connect to your ISP via Windows Dial-Up Networking or a LAN. If these requirements are not met, then the workstation will not be able to transmit e-mail through the Transmission Center, but will still be able to use all features of DP Informer.

Connect Through LAN

Check this box if you connect to the internet through a LAN (local area network). Uncheck this box if you connect to the internet using Windows Dial-Up-Networking (i.e., a dial-up account).

Dial-Up Connections list

This list box displays the Dial-Up Networking connections you have already established in Windows. Contact your internet service provider for information on how to set up a Windows Dial-Up Networking connection. After you have selected a connection, the connection name should appear in the label located to the right of this list box.

Username

Enter the user name needed to login to your internet service provider. This information will be completed automatically when you select a connection from the Dial-Up Networking list.

Password

Enter the password needed to login to your internet service provider. If the password is stored with the Dial-Up Networking connection properties, then this information will be entered automatically when you select a connection from the Dial-Up Networking list.

Retry Wait

Specify the number of seconds the Transmission Center should wait between dial attempts. You should allow enough time for the modern to reset and your phone line to return to the dial tone state.

Maintain Connection

Uncheck this box to have the Transmission Center disconnect an active Dial-Up-Networking connection after e-mail transmissions are complete. Check this box to have the Transmission Center stay connected to your ISP (unless otherwise directed by the Disconnect for Faxes check box).

Disconnect for Faxes

Check this box to have the Transmission Center automatically disconnect an active Dial-Up-Networking connection prior to sending faxes.

Send Test E-mail To

Enter the e-mail address to which you would like to send test transmissions. Test e-mail will be sent only when the Transmission Center or an individual task is in test mode or when an individual task is set to test mode.

SMTP Server Name:

Enter the name or IP address of your *outgoing* mail server - contact your internet service provider or network administrator for this information.

Port

Enter the port number that your SMTP server uses to send e-mail (it is typically 25).

Reply-to Address

Enter the e-mail address to which replies to your e-mail transmissions should be sent.

Your e-mail Address

Enter the e-mail account from which you are sending transmissions. This must be a valid e-mail account with the SMTP server specified, or no e-mail will be sent. An alias to an actual e-mail address cannot be used.

Subject

Enter the text you would like to appear on the subject line of your e-mail messages. This setting can be overridden in individual reports.

Body Message File

Select the text file which contains the text you would like to appear as the cover page for e-mail messages.

- Because the reports transmitted by e-mail are sent as attachments, and are not immediately visible, you might want your message text to include instructions regarding how to view the attachment
- You can use Replacement Tags to create a message that changes dynamically with every transmission. A sample e-mail body message file using replacement tags is provided in ...\INFORMER\MESSAGES\EMAIL.TXT.
- The body message file can be overridden in individual contacts (Contact window > Task Options > E-mail Options > Cover File).

2.3 Contacts and Their Reports

Note to Informer 5.x users: Informer company preferences have been converted into contacts. And those contacts are linked to companies and/or home bases, and already have result letters/result lists, e-mail address(es) and/or fax numbers associated with them. To find/edit a contact's report or delivery options, you can go to the Contacts > All Contacts list in the desired company or home base record, or find the contact through the Contact window.

Who receives reports generated by Informer?

Any contact that has a report configured for them can receive that report via e-mail and/or fax.

How do I find a contact?

You can (1) search for a contact from the Contact window, or (2) view the contacts associated with a location (company, home base, collections site, or lab).

- 1) Open the Contacts window (via the icon, or File > Contacts, or Ctrl + 4) and press the Find button. If you press the Search Now button, all contacts will be displayed for all locations and location types. If you want to limit your search, you can do so by selecting a location type (company, home base, etc) and/or specific location. For example, if you wanted to see all contacts associated with Alpha Trucking Company, you would select Company as the Location Type, and Alpha Trucking Company as the Location. Then pressing the Search Now button will display a list of all contacts associated with Alpha Trucking Company. (Double-clicking a contact will open the contact window and display the chosen contact.)
- 2) Select the desired company/home base/collection site/lab > select the Contact > All Contacts tab. This list will display all contacts associated with that location. (Double-clicking a contact will open the contact window and display the chosen contact.)

How do I add a contact?

You can add a contact from the location to which the contact should be linked, or from the Contacts window. If you add a contact from a location, the contact will automatically be linked to that location; if you add a contact in the Contacts window, that contact will *not* be associated with a location until you add a location to that contact.

- From a location: open the company/home base/collection site/lab window > select the desired company/home base/collection site/lab > open the Contacts > All Contacts tab > press the New Contact button. (A new contact will be created that is linked to that location.) Enter the display name, organization name, and (if you want to send reports to them) their e-mail address and/or fax number.
- From the Contacts window: open the Contacts window > press the + button. A new contact will be created. Enter the display name, organization name, and (if you want to send reports to them) their e-mail address and/or fax number. If the contact is to receive any reports that are specific to a location, you must also link the contact to that/those location(s).

How do associate a contact with a location?

Find the contact (see above) > select the Locations tab > press the Add Location button > choose a location type (company, home base, etc.) > select a location by double-clicking a location, or by selecting a location, and pressing the Ok button

• The list in the Locations tab will show the location(s) associates with to this contact

- A contact can be linked to multiple locations
- It is not necessary for a contact to be linked to a location

How do I add a report to a contact?

Find the contact (see above) > select the Reports tab > Add Report button > (reports are grouped into four categories) from the appropriate report category, choose a report > press the OK button. The report settings window will appear. You will need to review and/or change the report settings. Once you are content with the settings, press the Save button (you can always modify the report settings for this contact again in the future). Remember that the report that you just created, and its settings are **specific** to that contact. Any changes made to one contact's report will not affect the same report for another contact.

- Alternate method of assigning a report to a contact: Select a report from the Reports menu >
 configure desired settings > press Select Contact button > select a contact (see "How do I add a
 contact?" above). A message will appear asking "The contact doesn't have this report set up.
 Continue with the contact's default delivery settings? Yes/No" > press Yes to add the just-configured
 report to the selected contact > press the Save button.
- Billing reports cannot be added to a contact, except for invoices, which are automatically attached to the appropriate billing contact.

How do I modify the settings for a report that is assigned to a contact?

Find the contact (see above) > select the Reports tab > select the report that you wish to modify > press the Edit button > make any necessary changes > press the Save button > close the report window.

What is required for a report to be delivered via fax or e-mail?

- 1. A contact linked to the correct location
- 2. A fax number and/or e-mail address for contact
- 3. A report associated with contact
- 4. Report's destination set to e-mail and/or fax

2.4 Task Options

A contact's task options determine how and when a report is delivered.

When will reports be delivered?

By default, reports that have been generated will be sent as soon as possible (ASAP check box). You may also choose to delay delivery by unchecking the ASAP check box and choosing specific day(s) and time for delivery. The Transmission Center's delivery settings will also affect report delivery time: you can set the Transmission Center to send automatically (Options > Auto-Transmit), or manually. When Auto-Transmit is disabled, the pending reports will be delivered **only** when you manually press the Transmit Now button. See the Transmission Center topic for more detail.

How do I change the cover page for a contact's e-mail report(s)?

The default cover page is set in the communication settings (Preferences > Communications Settings > E-mail Options tab > Body Message File). If no cover file is set for a contact, the default cover file will be used. If you want to set a different cover file for a contact, select the contact, choose the Task Options tab, and press the folder icon to the right of the E-mail Options > Cover File box. Only text (. TXT) files can be used as e-mail cover pages.

How do I change the cover page for a contact's fax report(s)?

The default cover page is set in the communication settings (Preferences > Communications Settings > Fax Options tab > Cover Page File). If no cover file is set for a contact, the default cover page file will be used. If you want to send a different cover page to a contact, find the desired contact, choose the Task Options tab, and press the folder icon to the right of the Fax Options > Cover File box. *Only text* (.TXT) and FCP files can be used as fax cover pages.

How do I encrypt reports delivered through e-mail?

Encryption is a method to secure reports by protecting them with a password. Only those with our decryption software *and* the correct password will be able to view encrypted reports. By default, reports delivered via e-mail are *not* encrypted. If you wish to encrypt the reports, you will need to assign a password to contact(s). Reports for contacts *with* an encryption password will be encrypted; reports for contacts *without* a password will *not* be encrypted.

- Assigning an encryption password will encrypt all reports for that contact
- When an encryption password is assigned to a contact, you can choose to not encrypt individual
 reports. Here's how: choose the report from the contact's Reports tab > press the Edit button >
 select the Task Options setting > uncheck the "Use default task generation options from contact"
 box > uncheck the Encrypt check box.
- The recipient(s) must decrypt the reports (see below)

How does a recipient open encrypted reports?

Encrypted reports will have .EEA file extension (like Microsoft Word documents have a .DOC extension). To open the encrypted reports, your recipients need to download and install our attachment decryptor utility. Once that utility has been installed, all encrypted reports received on that particular workstation* will automatically open the EEA Decryptor, and prompt the user for a password. The password it asks for is the one that was assigned to that contact **at the time of transmission.**

In what format will the e-mailed reports be?

There are several available report format options: Adobe PDF, Microsoft Word, Microsoft Excel, etc. By default, a contact will receive reports in Adobe PDF format. This is the best format because of the smaller file size and better retention of formatting and fonts. The recipient needs to have the (free) Adobe Acrobat Reader installed to view PDF documents (typically, the Acrobat Reader is already installed on PCs). Have your recipients contact their IT/support staff if they need assistance in installing it. (Scanlon Associates does not provide support for this product.)

How do I change the file format of e-mailed reports?

The file format is assigned on a per-contact basis. To change a contact's e-mail report file format: select the desired contact > select the Task Options tab > select the desired file format from the Export Format drop-down menu > save the changes to the contact. (*This will not change the file format of reports that have already been generated.*)

By default, the file format assigned to a contact will be used for *all* reports for *that* contact. However, you can choose different file format(s) for individual reports. Here's how: select the desired contact > choose the Reports tab > select the report whose file format you would like to change > press the Edit button > select the Task Options setting > uncheck the "Use default task generation options from contact" box > select the desired format from the E-mail Export Format drop-down menu > save the report > exit the report settings window.

^{*} The decryptor needs to be installed on any and all workstations that will receive encrypted reports.

Does a contact need a dial prefix?

Typically, you do not need to enter a dial prefix for a contact. The Transmission Center will compare *your* area code (entered in the Preferences Communication Settings > Fax Options) with the area code of the *contact*. If they are the same, no area code will be dialed when sending faxes for that contact. If they are different, the Transmission Center will dial a 1 plus the contact's area code and fax number when sending faxes to that contact. However, there are rare circumstances when you need to dial a 1 before dialing a fax number, but *not* include the area code. When that is the case, you will need to enter 1 in the Dial Prefix box for those contacts. *Remember that if you dial a 1 when it is not necessary, the number will not be dialed. Please consult your local phone company for prefix and area code requirements.*

What is a Cover Message and how do I use it?

In addition to the standard cover sheet that is delivered with faxes and e-mail messages (see above for more information on that subject), you can also assign a cover message to a contact. This message will appear at the bottom of the standard cover page. You can choose to send this message always, once or never (via the drop-down menu above the message window). Here's how to add/edit a cover message: select a contact > choose the Task Options Window > enter the desired text into the Cover Message box > choose the frequency (send always, send always, or never send) > save the contact record.

2.5 Report Generation

The report generator is the feature of DrugPak that creates reports for delivery via fax and/or e-mail* and/or prints reports. *To generate reports for delivery via fax and e-mail, DrugPak Informer must be installed and licensed. Unless specified, this topic assumes that you have Informer installed and licensed.

Note to former Informer 5.x users:

- The Report Generator is the new name for the "Generate Tasks" process.
- Company Preferences have been migrated to contacts. Please see the contacts and task options/ reports topics for complete details.

How do I generate reports?

There are several things to consider before generating reports:

- Do contacts exist?
- Are the contacts linked to a location (company, home base, etc)?
- Are the locations linked to contacts correct?
- Do those contacts have e-mail addresses and/or and fax numbers?
- Do reports exist for those contacts?
- Do these reports have the correct destination (fax and/or e-mail)?

In most cases these items have been taken care of:

- When you create a new location, a contact is created with a link to that location
- For those who have upgraded from DrugPak Informer version 5.x:
 - o All Informer company preferences have been converted into contacts
 - Those contacts are already linked to the appropriate company and/or home base
 - Those contacts already have reports assigned to them with the appropriate preferences and destinations (fax and/or e-mail)
 - o Those contacts already have fax numbers and/or e-mail address(es)

If you need to create/configure either contacts or reports, please see the Contacts and Their Reports topic for instructions.

Follow these steps to generate reports:

Select the Location Type

- Choose from company, consortium, home base, collection site, laboratory, third party, (DrugPak) user, and MRO. For example, if you chose company, only reports for contacts linked to a company (or multiple companies) would be generated.
- When you choose company or consortium as the location type, an additional option to also include home bases is available. If you check this option, reports for contacts linked to a home base and reports for contacts linked to a company or to a consortium (depending on your choice of location type) will be generated.
- Select "Print All" if you do not want to limit the report generation to a particular type of location

Select the report(s) that you wish to deliver

- The reports are grouped into five categories (Analysis, Billing, File Lists, Orders, Random Selection, Results, and Uncategorized)
- Press the + icon next to a category to display the reports within a category
- You can select all reports in a category by checking the box next to it, or select individual reports by pressing the + icon to display the reports within a category.

Select a location (this option is available if you have not chosen "Print All" as the location type)

 Choose a location from the drop-down menu, or press the Find button and select a location, and press the OK button

Select the delivery method/destination for which you want to generate reports

- You can choose e-mail, faxes, and/or print jobs (e-mail and fax options available for DP Informer user only)
- · You must select at least one
- To generate reports, the desired reports *must* be configured to be delivered via desired method. For example, if you want to generate e-mail, the reports that you want to send must be configured to be sent via e-mail. Please see the Contacts and Their Reports topic if you need help with this.

Contact Filters (optional)

• You may add an additional filter to limit which contacts will have reports generated for them. See the filters topic for help with creating a filter.

Random Selection Report Settings (available when you chose any random selection report)

- Select the appropriate generation date range
- Only (Random Selection) reports for selections generated with that date range will be included in the report generation

Press the Generate button

DrugPak will generate all reports within your chosen settings.

Additional Considerations:

- A contact's permissions (Permissions tab) further limit what a contact is permitted to view via a
 report. Typically, a contact is linked to a company, and can therefore see records linked to that
 company (and its participants). However, if a contact's permissions are based on a consortium, the
 location to which the contact is linked is ignored. Additionally, if a contact's permissions include a
 filter, it will further limit the records that appear on their reports. See the Contacts topic for more
 information about permissions.
- A contact's report may have custom filters settings and/or settings that further limit which records will
 appear. To view/edit a report's settings and filters, select a contact > choose the Reports tab >
 select a report > press the Edit button.
- A report's "Generation Cutoff" date will limit which records appear in results letter reports, result list reports, and all random selection reports (no other reports are affected by this date). Any result or

data entered or modified *after* the cutoff date and time will be included the next time the report is generated or printed. Changing the cutoff date to an earlier date will widen the scope of the report.

2.6 Task List

Tasks and the Task List

- The check boxes along the top of the task list (fax, e-mail pending, completed, etc.) will affect which records are visible in the task list. For example, if you want to see *just* e-mail tasks, uncheck the fax check box. To see faxes and e-mail, be sure that both boxes are checked.
- Each record in the task list contains a report, cover sheet, recipient (contact), status, etc.
- While in the grid view, you can see tasks in the form of a list. If you need more information about a particular task or its associated report, select the desired task, and choose the Detail View tab.
- The Reports tab within the Detail View tab contains the report associated with that task.
- The task menu can be accessed via the Informer menu, or the main DrugPak tool bar.

Task

An icon reflects whether the task is a fax (fax machine), or an e-mail message (envelope with a lightening bolt).

Status

This represents whether the task is pending (clock face), complete (green check mark), failed (red X), on-hold, or a test. You can manually change the status for individual tasks by double-clicking the icon - each double-click will change the status to the next possible status. Alternately, you can change the status of a task by selecting the task, choosing the Detail View tab, and selecting a status from the status drop-down menu.

Contact

This represents the individual to whom the report(s) is/are to be sent.

Number of Records

This represents the number of records in the report associated with a task.

Additional columns indicate schedule date, scheduled time, and other details.

See these related topics: Contacts, Contacts and Their Reports, and Report Generation.

2.7 Transmission Center

The DP Informer Transmission Center has one basic interface: the main screen. At the top of the screen is the Main Menu. Along the left side of the screen is the toolbar. A set of Transmission Dialog displays are optionally visible (one each for faxes, and e-mail).

You may wish to place a shortcut to the Transmission Center (...scanlon\dp50\dpxmit.exe) in your Windows Startup folder. This will automatically load the Transmission Center if your machine is restarted in your absence.

Main Window

There is a listing for e-mail, and for each fax device (if installed). At the end of each device listing will be Transmit at XX:XX:XX AM/PM (if Tools > Auto-Transmit is enabled) OR Waiting for Manual "Transmit Now" Command (if Tools > Auto-Transmit is not enabled).

Below each listing (press the + to display, or the - to hide), are three items:

Auto Transmit (if Options > Auto-Transmit is enabled) OR **Manual Transmit** (if Options > Auto-Transmit is not enabled). If set to manual transmit, right-click on the item and choose Transmit Now from the menu. Otherwise, the transmission center will check the task list every two minutes for tasks that have not yet been sent. If there are pending tasks, the transmission center will send them, then wait two minutes again.

Real Mode (if Options > Test Mode is not enabled) OR **Test Mode** (if Options > Test Mode is enabled). In the latter case, all tasks will go to the e-mail address and/or fax number that is in the "Send Test E-mail/Fax to" field of the communication settings (Preferences > Communications Settings from the main DrugPak window). Unless you are testing, always keep each item in Real Mode.

Send On (if Options > Send E-mail/Send Faxes is enabled) OR **Send Off** (if Options > Send E-mail/Faxes is not enabled).

- The Send E-mail option needs to be enabled for e-mail tasks to be sent
- The Send Faxes option needs to be enabled for fax tasks to be sent

Options Menu

This menu offers numerous settings which significantly control the operation of the transmission center. These settings are saved separately for each workstation.

Auto Transmit

Check this item to have the transmission center automatically transmit pending reports. If this option is unchecked, the Transmission Center will remain idle. When Auto Transmit is off, a user must manually initiate a transmission by clicking the Transmit Now button.

You can ensure that the Transmission Center starts in Auto Transmit mode (regardless of the saved option menu setting) by passing a special parameter on the command line when loading the Transmission Center. The parameter is TRANSMIT.

Send E-mail

If this option is unchecked, the Transmission Center will ignore scheduled e-mail tasks.

Send Faxes

If this option is unchecked, the Transmission Center will ignore scheduled fax tasks.

Test Mode

This option must be unchecked in order to transmit to your customers. When this option is checked, tasks will be sent to the test e-mail address/test fax number designated in the communication settings (i.e., not to your customers.)

It is possible to place individual tasks in Test Mode. This is done in the task list: select the appropriate task, choose the Detail View tab, and change the status, and save you change.

Show Status Window

The status window can be used to troubleshoot connection problems, as well as to give an indication of general progress. If this option is checked, the status window will be visible all the time.

Enable Profiler

This is a diagnostic tool for the use the Scanlon Associates' support staff. Leave this tool *disabled*, unless otherwise directed.

Minimize on Startup

This will minimize the application to the system tray when started. The system tray is a special section of the taskbar, located to the far right of the Windows Start button (the clock is in the system tray). The system tray is a common place to find icons for programs which are running all the time, but with which the user does not frequently interact.

2.8 Broadcaster

This feature allows you send documents (or DrugPak reports) via fax and/or e-mail to multiple DrugPak contacts.

Requirements

- In order to receive bulk e-mail, a recipient's "Include in bulk e-mail" box must be checked (Contacts window > Additional tab) and they must have a valid e-mail address (Contacts windows > Address tab).
- In order to receive bulk faxes, a recipient's "Include in bulk faxes" box must be checked (Contacts window > Additional tab) and they must have a valid fax number (Contacts windows > Address tab).
- When broadcasting a DrugPak report, a contact's Permissions will be applied

Broadcaster Window

The broadcaster feature can be accessed by choosing Informer > Broadcast Faxes/Emails.

Company Scope

Use this setting to control which companies or consortium will receive the broadcast. You can choose to broadcast to a single company, to a consortium, or to all companies. For example, if you choose Company ABC, all contacts linked to Company ABC, will receive the broadcast (see requirements above).

Selected Company (setting visible when company is chosen in the Company Scope setting) Use the Find button to select the desired company.

Selected Consortium (setting visible when consortium is chosen in Company Scope setting)
Use the Find button to select the desired consortium.

Extra Filter

Optional filter to further limit the contact's that will receive the broadcast. (See the Add Filter Condition topic for more information of creating filters.)

Report Type

Choose which type of report to send: File (such a text document or Word document) or a DrugPak Report.

- If you choose a standard file, click the envelope button at the right end of the "Files to Send" box, and choose the desired file. Remember that if you are e-mailing a document, the recipient must have the appropriate software to open it (MS Word if it's Word document; MS Excel if it's an Excel document, etc.)
- If you choose DrugPak Report, press the Select Report button, and choose the desired report. Additionally, you may change the report's settings by pressing the Setup Report button. (A contact's permissions/company data access will limit which records will appear on the reports. See the Contacts topic for more on permissions and locations.)

Fax Cover

Choose the standard fax cover sheet (fax.txt), or create a new custom cover sheet, and place it in ... \dp50\messages.

E-mail Body

Choose the standard body message file (email.txt), or create a custom cover sheet in plain text (.txt) format, and place it in ...\dp50\messages.

E-mail Message Body/Fax Cover Sheet

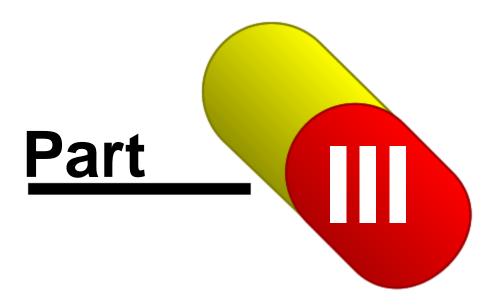
Text entered here will be appended to the end of the e-mail body message file (if chosen) and to the end of the fax cover sheet (if chosen). If no file was chosen for either e-mail or faxes, then the text entered here will appear as the corresponding cover sheet/body message.

Create E-mails/Create Faxes

Select the the desired delivery method(s).

Do not send multiple messages to the same address

Us this option to avoid duplicate messages going to multiple contacts that have the same e-mail address/fax number



3 DrugPak Live

DP Live is a database server application that provides access to their DrugPak data via the internet. You control which records and fields each visitor may view or modify. DP Live can even provide different user interfaces ("skins") for different classes of users. DP Live is an ISAPI DLL that is compatible with many popular Windows-based web servers.

3.1 Getting Started with DP Live

3.1.1 DP Live Configuration

DP Live can be hosted on any ISAPI-compatible web servers. Examples of ISAPI-compatible servers include:

- Falcon Web Server, by BlueFace Software (provided with DP Live)
- Microsoft Internet Information Server (for Windows NT//XP/2000/2003)

Configuring the Server machine

- The server machine must have access to the DrugPak database through your LAN
- The machine must have a persistent Internet connection
- Ideally, you have a static IP address; if not you will have to use some third-party service like No-IP that continually updates a domain name to your dynamic IP address. Scanlon Associates does **not** provide support/installation/implementation of any such third party services.

Configuring the Falcon Web Server (FWS)

FWS is automatically configured during the DP Live installation process. If FWS is already installed on the network, you can use the DrugPak Workstation Setup program to reconfigure FWS on your workstation. Consult the Falcon Web Server help file for information on manually configuring the server for other purposes.

Configuring Another Web Server

You must set up two "virtual directories" in your web server:

/bin

This virtual directory must be redirected to ...\scanlon\dp50\dplive\bin. This folder is where dplive.dll (the actual web application) is located.

*The /bin folder must have "Execute" permission in order for dplive.dll to run

If your web server already has a /bin directory, then you can copy dplive.dll into that folder. However, please note that if you do this then you must repeat this process whenever you install an update to DP Live.

/dplima

This virtual directory must be redirected to ...\scanlon\dp50\dplive\images. This folder stores the files referred to by the default DP Live HTML templates.

If your web server already has a /dplimg directory, then you can copy the files from ...\scanlon\dp50\dplive\images into your server's images folder. However, please note that if you do this you must repeat this process whenever you install an update to DP Live.

Running FWS and another Web Server at the same time

If you are already running another web server in your office, and you are unable to configure that server to host DP Live, then you may be able to run FWS "in parallel" with your primary server.

Your other web server is probably handling requests on port 80 (http) and port 443 (https). In order to prevent conflicts with FWS, you can configure FWS to take http and https requests at two alternative ports (e.g. 81 and 444). These modifications are made on the General tab in the FWS program window. In fact, you only need to configure one open port (The SSL port, for https connections).

To create a secure link to DP Live on an alternative port, you would format it like this (assuming that port 444 is the alternative SSL port you have selected): https://127.0.0.1:444/bin/dplive.dll/login

Linking DP Live from the Outside World

If you already have a web site, it is very likely that you are not hosting it in your office. Instead you probably have an independent ISP hosting your site. Even if you are hosting your own site in your office, these instructions may be useful to you.

In order to connect to the DP Live server, a visitor will need to know how to reach your web server via the Internet. If you have not purchased a domain name that resolves to your network gateway, then the best way to connect to your computer is with the IP address.

Determining your IP Address

If you don't know you're static IP address, open up your web browser, and enter the following URL: http://whatismyip.com/ When you connect to this site, your IP address will be displayed. This is an independent service unrelated to Scanlon Associates.

Formatting a URL to your Server

Once you know your IP address, it is easy to format the URL:

https://{ipaddress}/bin/dplive.dll/login

3.1.2 User Accounts

A user account represents a visitor to whom you have given permission to access DP Live.

- A DP Live user is defined by a DrugPak contact that has been assigned a User ID, password, and a location
- The user account is linked to a Security Profile, defining that user's basic database access privileges
- The privileges assigned in a security profile can be overridden for any individual user

Creating a DP Live User

- 1) Select an existing contact, and assign a User ID and password (in the Remote Access tab), or
- 2) Create a new contact and assign a User ID and password (in the Remote Access tab)

The DP Live user/contact will also need to be linked to a location - the company, home base, or consortium whose records the user will see. This is defined in the Permissions and Locations tab of the contact record.

In the Permissions tab there are three ways to define whose data the user will see: location, consortium, or filter (these three options are available near the top of the Permissions tab of a contact). By default a new contact will have their company data based on a location.

- 1) Location *(easiest method)*: if this option is selected, you will have to select a location in the Locations tab (by using the add location button at the bottom of the Locations window).
- 2) Consortium: if this option is chosen, and menu will appear that will allow you to choose a consortium. See the consortium topic for more information on consortia.
- 3) Filter: if this option is chosen, you will need to create a filter that will define whose data the user will see. You will need to take these steps to create a company-based filter:
 - a) Select the Company table from the list of tables on the left side of the Permissions tab

- b) Press the Add button
- c) Select "Code --- CO ID" from the Field Name menu
- d) Select "Is equal to..." from the Operator menu
- e) Choose a company from the Value menu either by clicking the down arrow, or by suing the Find button
- f) Press the OK button
- g) Save the filter for this user/contact by pressing the button with the check mark on it (at the bottom of the Permissions window)
- Using filter-based company permissions makes it difficult to add new companies to a user.
 Location-based access (item 1, above) is a better choice.
- When using filter-based permissions, you *must* specify a company
- When using location-based permissions, you may specify just a home base

Other DP Live User Settings

Skin

The skin indicates which set of HTML templates will be used to present data to a user. By default, a new contact/DP Live user will be assigned the skin that is assigned to the default security profile. However, if this user needs access to a custom skin, you can select an alternative from this list. Below this list is a text label that indicates where the specified skin has been defined (the security profile or here, in the user record). For most systems, this should always be default.

Security Profile

The security profile is a collection of database access privileges.

- The security profile is defined in the Permissions tab of a user/contact. See security profiles for more information.
- By default, a new user/contact will be assigned the "Default" profile

3.1.3 Security Profiles

A security profile is a collection of database access privileges. It defines a user's right to view, modify, insert, or delete records in the DrugPak database.

- You can use the same security profile for multiple user accounts
- You can override any property of a security profile for any user. See User Accounts.
- Security profiles can be accessed through the DP Live Administrator menu

A single security profile may be all you need for all users. However, you may want to add additional security profiles to differentiate between different groups of users. For example, you may find it convenient to create a special security profile for your staff, with more rights than other users. It is usually not worthwhile to create a security profile for just one user, because you can always override any property of a security profile in an individual user account. However, if you foresee adding future users with the same basic rights, you may want to consider setting up a security profile.

Profile Name

The profile name can be modified at any time, and this is the value you will see when a Security Profile is displayed in the permissions tab of a contact.

Skin

The skin indicates which set of HTML templates will be used to present data to users who are covered by this security profile.

- The drop-down list will show you all the skins which exist on your system
- New installations will only have one skin "Default"

Notes

These free-form notes are for display only.

Permissions

By default, you will see permissions for these database tables: company, home base, participant, and result. If you wish to see all possible tables, go to Preferences > Global Settings > DP Live Module > DP Live Administrator, and check the "Show all tables in Security Settings" box. Once you choose a table in the permissions tab (by clicking on it once), you are given the option to allow your DP Live user rights to modify, insert, and/or delete records in that particular table. For example, if you want to allow user to add participants, they will need insert rights on the participants table (i.e., select the participants table, and check the Insert box). Remember that any changes you make to a profile will affect all users who use that profile. If you want to change the permissions for just one user, go to permissions tab for that user (contact) and set the appropriate permissions there.

Filters

You may also add filters to limit which records users with a specific security profile can see. For example, you could create a filter to users to see only DOT tests, or only participants in a particular home base. Again, remember that any changes you make to a profile will affect all users who use that profile. If you want to add a filter for just one user, go to permissions tab for that user (contact) and create a filter there. See the creating filters topic for more information.

3.2 Customizing DP Live

3.2.1 Startup Expert

Use the startup expert (DP Live Administrator > Startup Expert) to:

- 1. Name your DP Live service the name will appear in the frame above the DP Live menu (also available in Preferences > Global Settings > DP Live Module > Skin Options > Branding > Application Name)
- 2. Choose a logo for you DP Live pages The logo will appear on the left side of the frame above the DP Live menu (also available in Preferences > Global Settings > DP Live Module > Skin Options > Branding > Banner Logo)
- Enter company name and contact information. This information will appear on the "Contact Us" page (also available in Preferences > Global Settings > DP Live Module > Skin Options > Contact Information)
- 4. Configure activity logging (these settings are also available in Preferences > Global Settings > DP Live Module > Log)

3.2.2 Customize the name of the "DP Live" Service

While DP Live may be a meaningful product name to you as a DrugPak user, we recognize that this name will not mean much to the visitors who actually use the DP Live service. To give your DP Live service a more user-friendly name, use the startup expert (DP Live Administrator) to change the name of the DP Live service. This new name will appear at the top of all DP Live pages. The name setting is also available in also available in Preferences > Global Settings > DP Live Module > Skin Options > Branding > Application Name. DP Live will need to be refreshed for any name change to take effect - DP Live Administrator > Remote Admin > Refresh DP Live.

3.2.3 DP Live Logo

Use this screen to customize the look of your DP Live site by choosing your company's logo, or a custom DP Live logo.

- Use either a JPG or GIF format file
- Press the folder icon to select the appropriate logo

3.2.4 Enter contact information

To allow your DP Live user to easily contact you, we recommend that you enter your contact information. The contact information appears in the "Contact Us" page (the phone number also appears below the name of your DP Live service. This information can be entered using the startup expert (DP Live Administrator > Startup Expert - step 3) or through Preferences > Global Settings > DP Live Module > Skin Options > Contact Information. DP Live will need to be refreshed for the contact information to take effect - DP Live Administrator > Remote Admin > Refresh DP Live.

3.2.5 Configure Activity Log

DP Live can maintain a log of visitor activity. The activity log is useful for seeing who has visited your site, and what features they have been using. You can also print reports that reveal the specific database changes made by your clients (Reports > Analysis > DP Live Activity Log). The level of logging can be set in the startup expert (DP Live Administrator > Startup Expert - step 4) or through Preferences > Global Settings > DP Live Module > Log. DP Live will need to be refreshed for the contact information to take effect - DP Live Administrator > Remote Admin > Refresh DP Live.

See the topic on DP Live logging for more information.

3.2.6 Custom Skins

DP Live uses HTML templates to determine how data is presented to the DP Live user. These templates are web pages, HTML fragments, and javascript excerpts that can use custom "replacement tags" to dynamically insert data and other content into each requested page.

- A complete set of HTML template files is called a "skin." You can configure DP Live to use
 one skin for some users, and another skin for other users, and so on. Of course you can
 use a single skin for all users.
- DP Live is installed with a single "Default" skin . No HTML experience is required to use DP Live with the included "default" skin.
- The "default" skin provided with DP Live should be sufficient for most installations of DrugPak Live. However, it is possible to alter the appearance of DP Live with the customization/modification of "skins."

Custom DP Live Skins

By creating a set of alternative HTML templates, you can completely redesign the look-and-feel of DP Live. (Designing custom skins is an advanced task and should be reserved for experienced HTML authors.) The design and maintenance of custom skins is not covered by the basic DP Live support plan. If you need assistance modifying custom skins, you will need to provide your design specifications to our support department, who will then create a custom programming price quote for you.

Skins

A "skin" is a set of HTML templates (and optional Javascript source files) that are interpreted by DP Live to present data to visitors. The HTML templates are stored in folders in the ...\dplive\skins folder. The user account or security profile is linked to the skin with a relative path to the skin folder, starting in the skins folder. For example, every installation of DP Live comes with a "Default" skin, whose files are stored in the folder ...\dplive\skins\default. When the skin is referenced in the DP Live Administrator, it is referred to simply as default. When you add folders to the skins folder (via Windows Explorer) then additional skins will appear in the skins lists in the user accounts and security profiles windows.

Different Skins for Different Users

You can present different user interfaces to different classes of users. This is possible, because every user account must be assigned a specific skin (See User Accounts).

Anatomy of the \SKINS Folder

...\DPLIVE\SKINS

The files located in this folder are the skin "root." Any visitor to the DP Live service can access these templates, regardless of whether they are logged in. LOGIN.HTM (the DP Live Login page) is an example of one of the files you would find in the skin root.

You should **never** modify files in the skin root, because these files may be overwritten by a later upgrade. If you want to provide an alternative version of a file in the skin root, you should place your version of the file(s) in the ...\skins\ altroot folder.

...\DPLIVE\SKINS\HELP

The files located in this folder are treated specially as online help files. These files contain instructions and advice for your online visitors. Any visitor can view these files, regardless of whether they are logged in. Help files are loaded with a special "help" URL path (http://127.0.0.1/bin/dplive.dll/help?file=help.htm) or <#HELP...> replacement tag.

You should **never** modify files in the ...\skins\help folder, because these files may be overwritten by a later upgrade. If you would like to provide alternative help files, you should place your version of the file(s) in the ...\dplive\skins\ altroot\help folder.

...\DPLIVE\SKINS\ ALTROOT

The files located in this folder are your alternative files to the standard skin root. If you would like to modify any of the files in the skin root, you should place your modified version of the file(s) in this folder. For example, if you wanted to provide an alternative Login page, you would copy ...\skins\login.htm into ...\skins_altroot\login.htm, and make your modifications there. DP Live will always load a file from this folder (if it exists) before loading the "same-named" file from the skin root.

...\DPLIVE\SKINS\ ALTROOT\HELP

The files located in this folder are your alternative files to the standard online help files. If you would like to modify any of the files in the root ...\skins\help folder, you should place your modified version of the file(s) in this folder.

...\DPLIVE\SKINS\DEFAULT

The files located in this folder compose the Default user skin. This skin may be periodically modified when you install program updates.

You should **never** modify files in the ...\skins\default folder, because these files may be overwritten by a later upgrade. Instead, you should create a custom user skin.

Custom Skins Folders

You can add additional folders to the SKINS folder, and fill the custom folder with HTML templates to be used by DP Live. When you add a folder to the SKINS directory, you have essentially created a custom skin. The skin will appear in the skin lists in the User Accounts and Security Profiles windows. You must assign the skin to a user account or security profile in order for that skin to be accessed by

anyone.

...\DPLIVE\SKINS\default\[custom]

or

...\DPLIVE\SKINS\[custom]

or

...\DPLIVE\SKINS\[custom]\[custom]\[custom]

A Skin Is A Folder Hierarchy

When DP Live receives instructions to load an HTML template, it first looks in the user's skin folder. If the visitor is not logged in, then DP Live cannot access a user skin. For non-logged-in users, DP Live will only use templates located in the root of the ...\skins folder, in ...\skins_altroot, or ...\skins\help.

However, let's pretend a user *is* logged in, and that user has been assigned the following skin: default\admin\john smith:

When the user logs in, the first HTML file to be loaded is always home.htm. For this user, DP Live will first look for the file in this path:

...\dplive\skins\default\admin\john smith\home.htm

However, it is quite possible that the home.htm file was not redefined for this custom skin (i.e., the file home.htm may not exist in the folder ...\dplive\skins\default\admin\john smith). In that case, DP Live will look at the next folder down the hierarchy for the file

...\dplive\skins\default\admin\home.htm

If DP Live finds home.htm in this location, then it will load the template from that location. As you can imagine, if the file does not exist here, DP Live will go down to the next level...

...\dplive\skins\default\home.htm

At this level, DP Live is certain to find the file, because it is one of the files located in the DEFAULT skin.

However, to extend the example, if we were to say that for some reason home.htm did not exist in the DEFAULT skin folder, then DP Live will then look in ...\dplive\skins_altroot

...then in ...\dplive\skins

Finally, if home.htm has not been found even in the root of the skins folder (which it should not, in this example), then DP Live will send back a response saying the file could not be found.

SUMMARY

DP Live skins allow you to create a hierarchy of customization. Each new level in the skin needs only to contain files which are different from the files in the lower levels. Therefore, it is not recommended to copy the entire DEFAULT skin into a new skin. We will continue to enhance the DEFAULT skin, and any features which you have not customized will inherit the new features when you install program upgrades.

3.2.7 Replacement Tags

DP Live's HTML templates use a variety of custom HTML tags that are dynamically replaces with additional content before being delivered to the user. This help topic merely lists the tags, but does not provide detailed instructions on how to use them.

COMMAND TAGS

The following tags perform special operations:

<#DATALOOP>

Loops through every record in the specified table, and formats output for each record, using the specified file template.

<#AND>

The imperitive <#AND> tag is a special way to combine more complex conditions into blocks, each of which must evaluate to true. It is different from the "implicit AND" which is acheived by merely chaining <#IF...> conditions together, because the <#AND> tag will cannot be overridden by the <#OR> operator.

```
Example 1: (indents provided for readability)
<#setvar a=1>
<#setvar b=2>
<#setvar c=3>
   <#ifgetvar a=3>
   <#OR>
   <#ifgetvar b=2>
<#AND>
   <#ifgetvar c=4>
<#Verbatim this tag will not be processed>
<#ELSE>
<#verbatim this tag will be processed because C is not 4>
Example 2: (indents provided for readability)
<#setvar a=1>
<#setvar b=2>
<#setvar c=3>
 <#ifgetvar a=3>
 <#OR>
 <#ifgetvar b=2>
<#AND>
 <#ifgetvar c=4>
 <#OR>
 <#ifgetvar b=2>
<#Verbatim this tag will be processed>
<#ELSE>
<#verbatim this tag will be not be processed>
Example 3: (indents provided for readability)
<#setvar a=1>
<#setvar b=2>
<#setvar c=3>
 <#ifgetvar a=3>
 <#OR>
 <#ifgetvar b=2>
<#AND>
 <#ifgetvar c=4>
 <#OR>
 <#ifgetvar b=2>
<#AND>
 <#ifgetvar a=1 b=2 c=3>
 <#OR>
 <#ifgetvar a=foo>
 <#OR>
 <#ifgetvar a=BLA>
```

```
<#AND>
  <#ifgetvar a=1>
  <#ifgetvar a=2>
  <#ifgetvar a=3>
<#Verbatim this tag will NOT be processed>
<#ELSE>
<#verbatim this tag WILL be be processed>
```

<#ELSE>

Use this tag as a control flow option, following an <#IF ... ><#SOMETHING> pair.

Example1:

```
<#SETVAR A=1>
<#IFGETVAR A=2>
<#VERBATIM This tag will not be processed>
<#ELSE>
<#VERBATIM THIS TAG *WILL* BE PROCESSED>
```

It is also possible to use additional <#IF...> tags following the <#ELSE> tag.

```
Example2:
<#SETVAR A=1>
<#IFGETVAR A=2>
<#VERBATIM This tag will not be processed>
<#ELSE>
<#IFGETVAR A=3>
<#VERBATIM This tag will not be processed>
<#ELSE>
<#IFGETVAR A=1>
<#VERBATIM THIS TAG *WILL* BE PROCESSED>
<#ELSE>
<#VERBATIM THIS TAG will not be processed>
```

<#IF>

Previously only one <#IF...> tag could be used to control whether a subsequent tag is processed. Now it is possible to provide a series of <#IF. ..> tags with implicit "anding".

Example 1:

```
<#SETVAR A=1>
<#SETVAR B=2>
<#SETVAR C=3>
<#IFGETVAR A=1>
<#IFGETVAR B=2>
<#IFGETVAR C=3>
<#VERBATIM This tag WILL be processed: A B and C are all right>
<#else>
<#IFNOTGETVAR A=1>
<#IFNOTGETVAR A=2>
<#IFNOTGETVAR C=3>
<#VERBATIM A B and C are all wrong>
<#ELSE>
<#VERBATIM (This tag will NOT be processed) Some are right and some are wrong>
```

<#LOAD>

Loads another HTML file template and inserts its contents here. The loaded file's replacement

tags will also be processed (and that file could theoretically load yet another file). Beware of file-recursion - you could create an infinite loop if you make a file eventually load itself again.

<#LOOKUP>

Look up the specified database record and fetch the specified field value.

<#OR>

The <#OR> tag can be used to create more complex conditions. You can use <#OR> in conjuction with the implicit and. If any OR condition is encountered, then it negates previously encountered false conditions, and continues evaluating subsequent <#IF...> tags.

```
Example1:
<#IFGETVAR A=2>
<#OR>
<#IFGETVAR A=1>
<#verbatim A is 1 or 2>
<#Else>
<#verbatim A is neither 1 nor 2>
Example2:
<#setvar a=1>
<#setvar b=2>
<#setvar c=3>
<#ifgetvar a=2>
<#ifgetvar b=2>
<#OR>
<#ifgetvar a=1>
<#ifgetvar c=3>
<#OR>
<#ifgetvar a=1>
<#ifgetvar b=2>
<#ifgetvar c=5>
<#verbatim this tag will be processed>
<#else>
<#verbatim this tag will not be processed>
```

<#RECORDCOUNT>

Outputs the number of records in the specified table. Respects filters. Careful! Counting records can be time-consuming.

<#REM a remark>

This tag is a remark only, and will stripped from the output file.

<#SETVAR [assignment]>

Store a string in a named variable.

STRING TAGS

The following tags output text.

<# [CustomTag]>

Any tag beginning with an underscore (<#_) is a user-defined tag.

<#APPNAME>

A reference to your brand-name for "DP Live." See Startup Expert.

<#CO_ID>

Outputs the value of the user's Current Company.

<#CO_NAME>

Outputs the full name of the user's Current Company.

<#COOKIES>

Displays all the current cookies being stored for the current user.

<#CURFILTER>

Displays the current filter expression for the specified table.

<#DATAFIELD>

Outputs the value of the specified data field.

<#DATE>

The current system date in long-date format (usually mm/dd/yyyy).

<#DISPLAYTEXT>

Outputs the "display text" of the specified data field. For example, if the result status field value is N, DISPLAYTEXT would output "Negative"

<#DPLINPUT FIELD=fieldname>

Creates a form element for the specified fieldname.

<#FRR>

The error message (if any) from the last request. Used by ERROR.HTM to display error messages.

<#GETVAR [variable name]>

Fetch a variable stored with <#setvar>

<#HELP>

Loads a help topic.

<#IMAGEPATH>

A reference to the default path for images (typically **\dplimg**).

<#INDEXLIST>

Creates a listbox listing all the indexes for the specified table.

<#IP>

The IP address of the visitor.

<#LISTBROWSER>

Outputs controls to allow the user to navigate multiple pages of a report.

<#MODULEPATH>

A reference to the relative path to the DLL. This has been deprecated in the DEFAULT skin, in preference of using relative tags.

<#MSG>

Used by INFO.HTM pass through informational messages.

<#PATHINFO>

Used by the ERROR.HTM, to display the path of the current request.

<#QFIELDLIST>

This routine uses TsaDbDefs (DBDEFS.INI) to obtain a list of field names associated with a given table, so the query programmer does not need to explicitly type it out. The output is formatted according to Scanlon Associates' query convention of "TABLENAME". "FIELDNAME"

TBL=(table name)
ALIAS=(alias in query)
[OMIT= (comma,separated,field,names,to,omit)]

<#QUERY>

Reiterates the query portion of the current URL.

<#QVAL>

Outputs one of the values from the query portion of the current URL.

<#READINI ... >

Reads an INI file value. Useful for getting custom replacement strings.

<#STATELIST field=fieldname>

A quick way to generate a listbox of US states for use with an input form.

<#USER>

Outputs the user's name (not their user id)

<#USERCOUNT>

Displays how many users are currently logged in.

<#USEREMAIL>

Outputs the user's e-mail address.

<#USERID>

Outputs the User's ID.

<#USERPHONE>

Outputs the user's phone number<#USERID>

<#VERBATIM [text to output]>

Output the specified (trailing) text as-is.

<#VERSION>

The current version of DPLIVE.DLL.

BOOLEAN TAGS

These tags can be used to conditionally execute other tags.

<#QIF [condition]>

If [condition] is a true statement about the URL query parameters, then execute the next custom tag. If [condition] is not true, then skip the next custom tag.

<#QIFNOT [condition]>

If [condition] is NOT a true statement about the URL query parameters, then execute the next custom tag. If [condition] IS true, then skip the next custom tag.

<#IFFINDKEY>

If the specified database record can be found, then execute the next custom tag.

<#IFDATAFIELD [fieldname=value]>

If the named data field is equal to Value, then execute the next custom tag. If the named data field is not equal to Value, then skip the next custom tag.

<#IFNOTDATAFIELD [fieldname=value]>

If the named data field is NOT equal to Value, then execute the next custom tag. If the named data field IS not equal to Value, then skip the next custom tag.

<#IFGETVAR [variable=value]>

If the variable is equal to Value, then execute the next custom tag. If variable is not equal to Value, then skip the next custom tag.

<#IFNOTGETVAR [variable=value]>

If the variable is equal to Value, then execute the next custom tag. If variable is not equal to Value, then skip the next custom tag.

3.3 Miscellaneous

3.3.1 Linking to Document Manager images/files

If you are using DP Document Manager, and have linked images/documents linked to test or participant records, users may view/download those linked files. See the document manager section of the skin options topic for more information.

3.3.2 Remote Administration menu

The DP Live Remote Administration menu gives you special administrative powers over DP Live through your web browser. The Remote Administration menu is displayed under *any* of the following conditions:

- You are at the same machine where the web server is running, and you connected to DP Live using the "localhost" IP address (127.0.01). For example: https://127.0.01/bin/dplive.dll/login
- You are at a machine with an IP address that is listed among the "Trusted IP Addresses" specified in Preferences > Global Settings > DP Live Module > Remote/Auto Admin page.
- You choose to run the administration menu from DP Live Administrator > Remote Admin > Show DP Live Remote Admin menu

The Remote Administration menu appears as a drop-down menu in the top-left corner of the DP Live page. Here are the possible options:

Show All Options

This will display all remote admin options as links on a separate web page.

Refresh

Choose this item to force DP Live to refresh itself. This is essential after any changes have been made in the global settings.

Suspend

Choose this item to suspend the DP Live service. This will cause DP Live to close all of its database tables. The DP Live program will continue to run, but if a visitor tries to access the system, they will receive a message that the system is currently being updated. This function is useful when you want to manually pack a database file through the DrugPak main module.

Resume

Click this link to resume the DP Live service. Visitors will again be able to use the system.

Enable Profiler

Choose this item to enable the profiler (troubleshooting tool used by support staff). Unless otherwise directed, it is recommended that the profiler remain disabled.

Disable Profiler

Choose this item to disable the profiler.

Profiler Log

Choose this item to display the profiler log in a separate window.

User List

Choose this item to display a list of all the users who are currently logged on. This list gives you the ability to "kick" a user off the system, or to display a log of that user's activity.

Variables (For use by advanced users only)

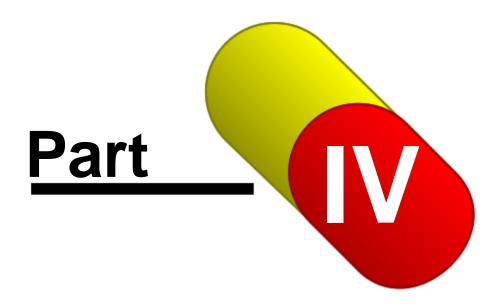
Choose this item to current DP Live settings.

Web Modules (For use by advanced users only)

Click this link to show how many web modules have been created and how many open tables each one has.

Admin Menu Off

Click this link to hide this menu, so you can see what the system looks like for "normal" users. This is particularly useful if you have manually loaded the remote administration menu at a computer that should normally not have access to this menu.



4 DrugPak Billing

4.1 Settings

4.1.1 Billees

A DrugPak billee represents an "account" entity that can be billed.

- A billee record consists of a contact and a set of billing preferences that is assigned to a company and/or home base
- A company or a home base has only one billee (However, it is possible to use billing rules to split company charges among multiple billees)
- Each billee can be assigned to multiple home bases and/or companies
- Multiple billees can be assigned to a single contact
- You can reassign a billee's contact, so future bills are sent to a different person

Account Number

Th account number uniquely identifies a billee. This account number is created from the company's account number. However, changing a billee's account number will not change the account number of the company to which that billee is assigned (or vice-versa).

Contact

Name, street address, phone, and e-mail address of the contact associated with this billee is displayed here. Press the > to:

- · edit the contact's settings
- copy the contact's information to the Windows clipboard
- · lookup and assign a different contact for this billee
- · create and assign a new contact for this billee

Active

This box must be checked for an invoice to be generated for this billee.

Settings Tab:

Billing Profile

The billing profile contains settings for test price schedule, charging for excused tests, line item detail text, additional rule sets, collection site charges, lab charges, discounts, taxes and administrative charges. Press the > button to:

- Select a different billing profile for a billee
- Edit current billing profile
- Create a new billing profile

Price Schedule

The price schedule contains the prices for tests, collection site charges, lab charges and positive test surcharges. You can use either the price schedule linked to the billing profile (Use billing profile's price schedule), or select/create a new one for a billee. Unless overridden by a different price schedule for a home base, company, or custom rule, this price schedule will be used. Press the > button to:

- Select a different price schedule
- Edit current price schedule
- Create a new price schedule

Additional Rule Set

This optional feature that allows you to create custom rules to modify or add to fees. For example, you

might want to charge a different price for an on-site test, or charge extra for a hair test. Press the > button to:

- Select a different rule set
- · Edit current rule set
- · Create a new rule set

Customer Since

This is the date that the company that this billee is assigned to became a customer, and is necessary for applying a seniority discount. *The date is linked to the billee, not the company.*

Invoice Form

This is the report that is used to create the invoice. Both reports are capable of displaying a virtual letterhead. To add, remove or change the letterhead for either invoice form, go to Preferences > Global Settings > Main Module > Virtual Letterhead.

Prior to version 6.0, logo.rpt was used in order to allow for a logo or letterhead image to appear at the top of the invoice (i.e., form.rpt could not display a logo or letterhead image). In version 6.0, both reports can display a logo or letterhead. The reports are identical. Logo.rpt always displays the letterhead image, regardless of the global setting.

Secondary Print Order

Items on an invoice are sorted first by the Print Order settings for each type of item* (set in Preferences > Global Settings > Billing Module > General), then by the secondary print order. Secondary print order options are transaction date, description, and details.

* Unlike other global settings, the print order for miscellaneous charges is determined by the setting in each miscellaneous charge. The global print order setting for misc. charges acts as a default value that is used when creating a new miscellaneous charge.

Ignore Print Order Field

Check this box to ignore the primary print order (set in Preferences > Global Settings > Billing Module > General). With this option enabled, just the secondary print order will be used.

Group Invoice Items

This setting allows you to group invoice items by company, by home base, or to not group invoice items.

New Page on Group Change

Check this box to print each new group (company or home base) on a new page (you must choose to either group by home base or group by company (above)).

SSN Cosmetics

This setting controls how the Social Security number is displayed on invoices. You can use the global default setting, (Preferences > Global Settings > Main Module > Participant Options > SSN Cosmetics), or select a different masking format for this billee.

Use Default Terms

Check this box to use the default payment terms set in global settings (Preferences > Global Settings > Billing Module > General Options). The phrase you specify will appear on the invoice.

Payment Terms

If Use Default Terms box is not checked, you may enter invoice payment terms for this billee.

Use Default Message

Check this box to use the default invoice message from the global settings (Preferences > Global

Settings > Billing Module > General Options).

Invoice Message

If Use Default Message box is not checked, you may enter an invoice message for this billee. The phrase you specify will appear at the bottom of the invoice.

Repeat on Every Page (available only when Use Default Message box is not checked) Check this box to display the invoice message on every page of the invoice.

Misc. Charges Tab

This grid displays miscellaneous charges associated with this billee (if any). You may choose to show (or hide) recurring charges, participant charges, home base charges, result charges, and company charges. Press the appropriate button to add, edit, or delete a miscellaneous charge.

Location Tab

This grid displays all companies and/or home base linked to this billee. Double-clicking a location will open the corresponding company or home base window.

Invoice History

This grid displays invoices generated for this billee (if any). To re-print an invoice, right-click an invoice record and choose Print Invoice.

4.1.2 Billing Profile

A billing profile is a set of billing options assigned to billees. Changing the setting in a billing profile will affect all invoices generated for all billees that use that particular billing profile.

Test Price Schedule

The price schedule contains the prices for tests and positive test surcharges. Unless overridden by a different price schedule for a home base, company, or custom rule, this price schedule will be used. Press the > button to:

- · Select a price schedule
- Edit current price schedule
- Create a new price schedule

Charge for Excused Tests

This setting allows you to charge for all excused tests, charge only for excused alternate tests, to not charge for any charge excused tests.

Summarize Line Items on Invoice

Check this box to summarize line items by test type (e.g., all RND tests will appear on one line on the invoice). Uncheck this box to display each test on a separate line.

Line Item Detail Text

Line item detail text is the text that appears in the Details column of the invoice. You can choose to print any data in this column (e.g., specimen ID, collection site name, Social Security number, etc.). All details are grouped into line item detail text profiles. Press the > button to

- Select a group of line item detail
- Edit the selected line item detail text (this will give you a list of possible fields to choose from)
- Create a new group of line item detail text

Test Charges Rule Set

This optional feature that allows you to create custom rules to modify or add to fees. For example, you might want to charge a different price for an on-site test, or charge extra for a hair test. Press the > button to:

- Select a rule set
- · Edit current rule set
- Create a new rule set

Collection Site Charges

Check this box to charge collection site fees for this billing profile. By default, the collection site fees will be determined by the price schedule(s) set for each collection site ("(Controlled by Collection Site)" option). Press the > button to:

- Select a price schedule
- Edit current price schedule (this option is not available when (Controlled by Collection Site) is chosen)
- Create a new price schedule

Laboratory Charges

Check this box to charge laboratory fees for this billing profile. By default, the laboratory charges will be determined by the price schedule(s) set for each laboratory ("(Controlled by Laboratory)" option). Press the > button to:

- Select a price schedule
- Edit current price schedule (this option is not available when (Controlled by Laboratory) is chosen)
- Create a new price schedule

Discount Profiles

Discount profiles are groups of discount settings. By default, a billing profile will have no discounts associated with it (Not Selected). Press the > button to:

- · Select a discount profile
- Edit current discount profile
- Create a new discount profile

Tax Profiles

A tax profile is a set of (up to two) taxes. By default, a billing profile will have no tax profile (i.e., tax exempt). Press the > button to:

- Select a tax profile
- Edit current tax profile
- Create a new tax profile

The G/L account(s) assigned to a tax profile must be configured as a tax liability account (Global Settings > Billing Module > G/L Accounts > Chart of Accounts). If a G/L account is not configured as a tax liability account, no taxes will be charged for that G/L account.

Administrative Charges

Administrative charges include active participant fees, terminated participant fees, minimum fees, and flat rate. By default, a billing profile has no administrative charges associated with it. Press the > button to:

- Select a administrative charge profile
- Edit administrative charge profile
- · Create a new administrative charge profile

4.1.3 Price Schedules

- A price schedule is a set of prices
- Test price schedules can be assigned to a home base, company, billee and/or billing profile
- Test price schedules will be used in this order: home base > company > billee > billing profile (i.e, the billing calculation will look first for a price schedule assigned to a test's home base; if it doesn't find one, it will then look for a test price schedule assigned to the company...and so on).
- Lab price schedule can be assigned to only labs

· Collection site price schedules can be assigned to only collection sites

Category

A price schedule refers to prices for any of three categories:

- Collection Site
- Laboratory
- Test

Positive Test Schedule

This refers to the prices schedule (if set) that will be added to the basic test schedule rate for positive tests. Press the > button to:

- Select a price schedule
- Edit current price schedule
- Create a new price schedule

Price Grid

The grid displays the charges for this price schedule for non-DOT drug, DOT drug, non-DOT alcohol, and DOT alcohol tests.

- When the test type is "Standard", the charges will be assigned for all test types
- If you have more than one set of prices, the billing calculator will first look for a test-type-specific price; if one is available, it will be used, if not, the "standard" price (if set) will be used.

4.1.4 Billing Rules

This optional feature allows you to create billing actions that will be executed under certain circumstances. For example, you might charge extra for an on-site test, or a different price when a particular MRO reviews a test result, or modify the line item for certain tests.

- A rule includes the conditions that must be met for the action(s) to occur, and the actions themselves
- A rule set is a set of one or more rules
- A rule set can be assigned to a billing profile, a billee, a company and/or a home base
- When present, rule sets will be executed in this order: billing profile > billee > company > home base
- If you use the STOP action in a rule, the billing calculator will halt the processing of rules for only that particular billing level (e.g., a rule set that includes a rule to STOP, and a rule set assigned to a home base: when that condition is met, no more rules will be evaluated within that rule set for that profile. The rule set assigned to the home base will be evaluated.)

Move Up/Move Down

Select a rule, and press the appropriate button to move rules up or down in the list. This will change the order in which the rules are executed.

Add a Rule

Press this button to create a new rule for this rule set.

Modify a Rule

Press this button to open the billing rules editor window. This will allow you to edit the condition(s), action(s), and/or price(s) of a rule.

Remove a Rule

Select a rule, and press this button to remove a rule.

Expand All/Collapse All

Press the appropriate button to expand all rules, and view all actions, or collapse all rules. Collapsing all rules will show you just the rule name, not the actions.

4.1.4.1 Billing Rules Editor

The billing rules editor allows you to add, remove and edit the actions, conditions, and prices for a rule.

Create a condition for your rule

This is the condition (e.g., dilute result) that must be met for the actions (set in step 3) to be executed.

- The standard add filter feature is used to create a condition
- You can view the filter/condition in English (e.g., The Result is Dilute), or in literal mode (TESTS. DILUTE=TRUE)
- If a rule has no conditions, the actions will always occur

Select the Actions(s) for Your Rule

Select the actions that you wish to occur when the (above) condition(s) is/are met:

Add / modify a charge

- Select a charge type
- Select a pricing action:
 - Replace this option will replace the previously-determined* price with the price set below (in price grid/unit price).
 - This price change will occur for only this charge type
 - If a price has not been previously determined, the Replace option sets the initial price
 - Add this option will add the price set below (in price grid/unit price) to the previously-determined* price
 - This price change will occur for only this charge type
 - If a price has not been previously determined, the Add option sets the initial price
 - o **Double** this option will double the previously-determined* price
 - This price change will occur for only *this* charge type
- Price Grid you can choose an existing price schedule, or manually enter the price by choosing "Enter Unit Price Manually."
- Unit Price (available only when "Enter Unit Price Manually" option is for the price grid) enter the unit price
- Freeze Price check this box if you do not want the price for this charge type to be changed by future rules.
- * This is the price set by a price schedule or by a previously executed rule.

Edit the Details

Check this box to replace the line item's detail (as set in the billing profile) with the item(s) available under the replacement tags menu (such as participant ID, SSN, lab code, etc.)

• Select a charge type. By default, the charge type is set to test fee. You may choose ALL, or a specific charge type

Edit the Description

Check this box to replace the line item's description with the item(s) available under the replacement tags menu (such as participant ID, SSN, lab code, etc.)

 Select a charge type. By default, the charge type is set to test fee. You may choose ALL, or a specific charge type

Set the Grouping Key

Set the G/L Account

Check this box to assign a G/L account.

- Select a charge type
- Select a G/L account (G/L accounts must be set up in Preferences > Global Settings > Billing Module > G/L Accounts to appear in this list)

Set the Print Order

Check this box to override the print order settings in Preferences > Global Settings > Billing Module > General Options.

- Select a charge type
- Set the print order value (from 0 to 9999)

Set Tax and Discount Flags

Check this box to override the tax and/or discount settings in the billing profile and/or in previous rules.

- Select a charge type
- Charge Tax 1/Charge Tax 2
- By default, this item will be null (grayed-out). If you want to charge tax 1 for line items that meet the condition(s) for this rule

Assign a Billee

Check this box to route a charge to a different billee. If a charge type other than the test fee is selected then the original billee will still get the charge and the assigned billee will get some additional charge.

- Select a charge type
- Use Lookup by Company button to identify the billee

Delete a Line Item

Check this box to delete a line item that would otherwise be part of the invoice. When this action is enabled other actions are disabled and may be automatically de-selected.

Select a charge type to delete

Chain to Another Rule Set

Check this box to begin another rule set. his arrangement makes it possible for a single rule to determine if another group of rules should also be executed. Upon completion of the other rule set the logic will not return to this point but would stop in the other rule set as per normal.

· Select a rule set to chain to

Report an Exception

Check this box to trigger an exception message, including the rule name and the condition, that will be included in the billing calculation exceptions report.

Stop

will stop processing rules in this rule set. If other rule sets are involved in the processing if the result record (home base, company, billee or billee profile) then those other rules will process as per normal.

4.1.5 Charge Types

A charge type is a potential line-item on an invoice. When DrugPak's billing calculation processes a result record one or more charge types can be triggered. Any charge type that is triggered by a result record will cause a line item to appear on the invoice, so one result

can have as many line items associated with it as necessary. An exception to this rule is that there is a Global Setting | General Options to "Bundle" lab and collection site charges which will cause these either/both of these charge types to be bundled with the test type charge type.

There are three reserved charge types: test fees, collection fees and lab fees. These charge types are triggered through the Billing Profile (and possibly manipulated by associations with billee, company, home base, collection site, and laboratory records) through price schedules.

Other charge types can be created and modified to be used with miscellaneous charges and billing rules.

Entering Charge Type records

Charge Types is found in the Billing menu.

Charge Name

This field identifies the charge type in find windows and drop-down lists. In non-reserved charge types, it is displayed as the description of a line item on the invoice. (Reserved charge types display a reference to test type for test fees and the location name for collection site and lab fees.)

G/L Account (only available when Global Options | G/L Accounts | Use Advanced Accounting Features box is checked)

This optional field is used as a default G/L for miscellaneous charges.

Print Order

This optional field is used as a default print order for miscellaneous charges.

Line Item Text

This optional field is used as a default line item text format for custom rules unless the detail section is otherwise modified in the custom rule.

Grouping Key

This feature is still in development.

4.1.6 Discount Profiles

A discount profile is a set of discounts. It is assigned to a billing profile and a billing profile is assigned to a billee. Since discounts are specific to a billing profile, they will be applied **only** on invoices that were calculated using that particular billing profile.

Threshold Type

Choose the type of threshold to use for discount profile. Options include:

- Seniority (Months) this option and calculates the time (in months) since the date in the billee's "Customer Since" field
- Active Participants number of active (non-terminated) participants in the billee's locations
- Total Participants total number of participants (both active and terminated) in the billee's locations
- Tests This Cycle number of tests included in current invoice
- Total Tests on File total number of tests for locations linked to billee
- Current Invoice Amount

Discount Amount Type

Choose either percentage or dollar amount.

Discount Tiers

You can create up to three discount levels.

4.1.7 Tax Profiles

A tax profile is a set of (up to two) G/L accounts that have been configured to be (a) tax liability* account(s).

- A tax rate is applied to a G/L account > a G/L account is assigned to a tax profile > a tax profile is assigned to a billing profile > a billing profile is a assigned to a billee. Since these taxes are specific to a billing profile, they will be applied **only** on invoices that were calculated using that particular billing profile.
- If you do not want to charge tax for a particular profile, choose (Tax Exempt) as the tax profile in the billing profile (new billing profiles will have this option selected by default)
- * G/L accounts, and their tax rates are configured in Preferences > Global Settings > Billing Module > G/L Accounts).

4.1.8 Line Item Details

A line item detail text profile is a set of DrugPak data fields that appear in the details column of an invoice. A line item detail text profile is assigned to a billing profile, and a billing profile is assigned to a billee. Since line item details are specific to a billing profile, they will appear **only** on invoices that were calculated using that particular billing profile.

- Profiles that existed in 5.x will have the old format \$PN (for name), \$PS (for SSN), etc. This format will still work, but the new format is easier to configure. When configuring, the field is shown with its name [Participant Name], rather than a replacement tag (\$PN).
- To add DrugPak fields to a profile, scroll through the list of available fields in the Data Field column, double-click the item, or select the item and press the Add button.
- It is possible to use billing rules to further control the final line item detail

Name

This is the name of the current line item detail text profile.

Data Fields

All possible data fields are displayed in this window. Some items have multiple items within them (such as participant fields). To access these additional fields, click on a plus sign.

Add button

Once you have chosen a field to be displayed in the detail column, press the Add button to add it to the Line Item Text column. You may also manually enter text in the Line Item Text window.

Line Item Text

Items in this window will be displayed in the detail column of an invoice. You may also manually enter text in the Line Item Text window.

4.1.9 Administrative Charges

Administrative charges are optional charges levied each time an invoice is calculated. Administrative charges are assigned to a billing profile, and a billing profile is assigned to a billee. Since the charges are specific to a billing profile, they will appear **only** on invoices that were calculated using that particular billing profile.

Flat Rate

This amount will be added to each invoice.

Active Participant

This is the price per active participant to be added to each invoice. See Global Settings > Billing Module > General Options for options to charge this fee only for (1) participants who are active and "Included in Randoms" and/or (2) active DOT participants.

Terminated Participant

This is the price per terminated participant to be added to each invoice.

Minimum Fee

This fee will be charged if the total of the other administrative fees (Flat Rate, Active Participant, Terminated Participant) total is less than this amount.

Discount Apply

Check this box to apply discounts to a given set of administrative charges.

4.1.10 Miscellaneous Charges

Miscellaneous charges can be used for one-time or recurring charges or credits.

Billable

This check box determines a charges eligibility for inclusion in a billing cycle. After you finish the billing process, this box for non-recurring charges will be unchecked, so they are not billed again.

Date

Transaction date to determine eligibility for inclusion in a billing cycle. The charge will not appear on the invoice unless this date falls in the billing date range (see Invoice Calculation topic). This field is disabled for recurring charges.

Recurring/Every

Check this box to set apply this charge: (a) every time bills are calculated (by setting the frequency to 0), or (b) per chosen frequency (e.g., every 3 months). Setting the number above 0 will re-enable the date box. When invoices are calculated, the date will advance the appropriate amount (as chosen by the number and frequency.) For example, if the date was set to 08/01/2007, and the frequency was set to every 3 months, once invoices are calculated that include this charge, the date will advance to 11/01/2007 (and won't be charged again until the date range of your invoice includes 11/01/2007.)

Unit Price

The base charge/credit amount (negative amounts are supported, and will appear as a credit on an invoice).

Quantity

The total number of charges/credits at the unit price.

Charge Type

Select the appropriate charge type, or create a new one by selecting Billing > Charge Types. See charge types for more information.

G/L Account

If exporting to third-party accounting software, select the appropriate G/L account. See G/L accounts for more information.

Description

Use this to describe the purpose of the miscellaneous charge.

Details

Use this box to provide additional detail about the charge.

Print Order

Use this to set the print order (where it will appear on the invoice). The global print order (Preferences > Global Settings > Billing Module > General Option) settings will be used along with the print order of miscellaneous charges to determine print order.

Apply Discounts/Apply Tax 1/Apply Tax 2

Optionally apply discounts (if set up), and taxes (if set up.) Please see the related topics: discounts and taxes.

Linked Records

At a minimum, you need to link a miscellaneous charge to a billee (so that the calculation knows whose invoice the charge will appear on). Each time the selected billee is invoiced *and* the date of the charge falls within the date chosen during the calculation procedure, that charge will appear on the invoice for that billee. Additionally, you may also link miscellaneous charges to a company, home base, participant, and/or test result. Links to a company, home base, participant and test results will *not* affect whether a misc. charge is invoiced or not. These additional links are provided to allow for additional record-keeping, and so that miscellaneous charges can then be viewed/modified from their respective windows in DrugPak.

4.2 Invoice Calculation

How do I calculate invoices?

Step 1: Calculation:

Open the billing calculator by choosing Billing > Calculate Bills

Company Scope

Choose to calculate for a single company, a consortium, or all companies.

Company/Consortium Name

When choosing to calculate for either a single company or a consortium, you must choose a company or consortium.

Date Range Field

This setting determines which date fields are used for the billing period. Options include collection date (default), MRO verification date, date modified, date added, custom date 1 and custom date 2.

Billing Period Start Date/End Date

Select the appropriate start and end dates for the period for which you want to calculate invoices.

Default Date for Line Items

This is the date which will be assigned to charges which are not associated with a particular date (such as administrative fees, or recurring miscellaneous charges).

Bill Inactive Companies

Check this box to generate invoices for companies which have been marked inactive.

Report an exception if a company has no tests in the billing period

Check this box to be warned if any of the selected companies had no tests in the billing period.

Do not generate invoice if company has no activity

Check this box to not generate an invoice for a company if there are no tests in the billing period. Regardless of this setting, if a company has miscellaneous charges within the billing period, an invoice will be generated.

Include billees not assigned to companies

Since miscellaneous charges can be assigned to billees, this option will include billees which are not assigned to a company, but which may have miscellaneous charges assigned to them.

Extra Filter

Extra filters are optional. They allow you to limit the calculation to certain tests. See the filter section for detail about creating filters.

Exclude Companies (available when company scope is set to consortium or all companies)

Click this button to manage a list of companies which should be excluded from the invoice calculation.

Step 2 - Print Proof Lists:

This step of the billing expert will allow you to print totals summary proof lists, exceptions report, inactive companies billed, and both G/L sales journals (available only when the "Use advanced G/L accounting features" box is checked in Global Settings > Billing Module > General Options). If you find a problem, you can reject the invoices, correct any settings that may be wrong, then re-calculate.

Step 3:

The finalize invoices window will display all unprocessed invoices. Options include:

Accept Selected

This will accept and finalize one invoice. Be sure that the invoice amount and details are correct - there is no way to "un-finalize" an invoice.

Accept ALL

The will accept and finalize *all* invoices. As an extra measure of precaution, you will be prompted to verify that you want to finalize all the invoices. **Be sure that the invoice amounts and details are correct - there is no way to "un-finalize" invoices.**

Reject Selected

This will reject an individual invoice, and remove it from the list.

Reject ALL

This will reject all invoices.

Review Line Items

This will allow you to view the individual line items of a particular invoice.

Preview Invoice

This will allow you to view a preliminary invoice before accepting and finalizing it.

Preview all invoices

This will allow you to view preliminary invoices before accepting and finalizing them.

Step 4 - Exporting

If "Require A/R export prior to final features" global option box is checked, you will have the option to export you invoice data to external accounting software.

- Press the next button and the translation engine control panel will appear
- Choose the appropriate layout template (either QuickBooks or Peachtree)
- The final step will create a TXT file that is then used importing

Refer to your QuickBooks or Peachtree documentation for instructions on importing the DrugPak billing export file.

4.3 How Are Invoices Calculated?

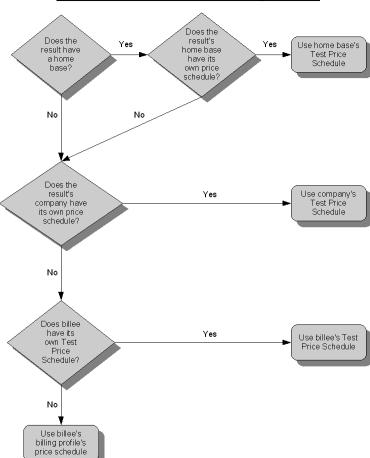
4.3.1 Which Billee Will DrugPak Use?

The calculation evaluates the following items to determine which billee to use:

Which Billee Will DrugPak Use? Does test Does the home base have a home billee specified? base? Nο Νo Yes Use company's Use home base's Yes Use billing rule's billing rule change the Rules change the billee after calculating prices based on the original

4.3.2 Which Test Price Schedule WIII DrugPak Use?

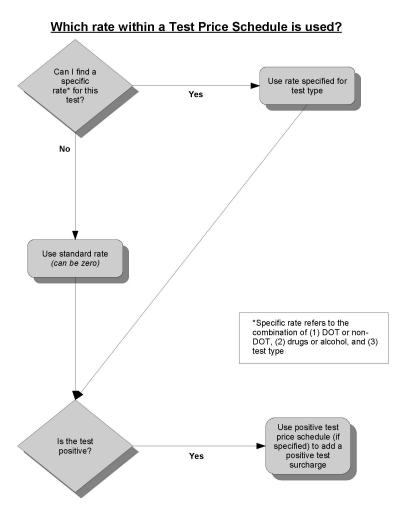
The calculation evaluates the following items to determine which price schedule to use:



Which Test Price Schedule Will DrugPak Use?

4.3.3 Which Rate Within a Test Price Schedule?

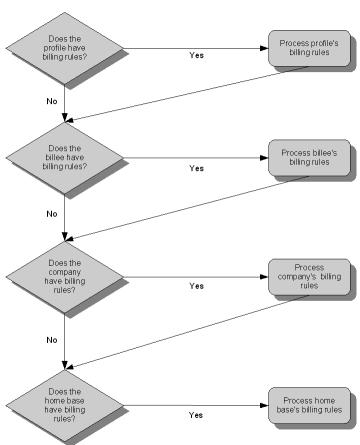
The calculation evaluates the following items to determine which price within a schedule to use:

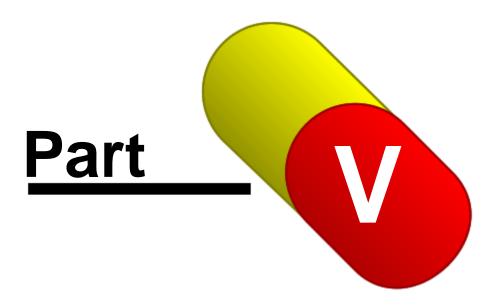


4.3.4 Evaluation of Billing Rules (if any)

The calculation evaluates the following items to determine which billing rule (if any) is used:

Evaluation of Billing Rules (if any)





5 Service Manager

5.1 Introduction

The Service Manager module is purchased and licensed separately from DrugPak.

Service Manager is a module that allows DrugPak users to pre-enter orders for test results. This module includes:

Order Entry

An order represents a request for testing for a particular participant. The order could be a for an alcohol test, drug test, or any number of other services, such as X-rays, EKGs, physicals, CAT scans, etc. See How to Enter Orders topic.

Services/Test Class Entry

By default, DrugPak has two test classes: drug and alcohol. To create additional test classes, choose File > Test Classes. Test classes will appear in the order entry window as "Services" and on the results window as "Test Class" (formerly labeled "Test Type").

Appointment Entry

Once an order has been created for a participant, an appointment can be scheduled for each service. The appointment window allows you to assign (among other things) a date, time, collection site, lab, and a panel.

Substance Assignment

For a drug or alcohol test, the definition of a substance remains the same. With the addition of services, substances now also refer to "sub-tests." An example would be a test class called physical, with a set of "substances" that include blood pressure, height, weight, etc.

Substances/"sub-tests" can be available for *all* test classes, or limited to a specific test class (or classes). To add, remove, or edit the test classes that will offer a particular substance, choose Codes from the main menu, and select Substances within the "Filter by type" box. The "Test Classes" box at the bottom of the window will allow you to assign a substance code to "All Classes," or with the "All Classes" box unchecked, choose one or more test classes for that particular substance.

Panel Assignment

Substance panels can be available for *all* test classes, or limited to a specific test class (or classes). To add, remove, or edit the test classes that will offer a particular substance panel, choose File > Substance Panel. The "Test Classes" box at the bottom of the window will allow you to assign a substance panel to "All Classes," or with the "All Classes" box unchecked, choose one or more test classes for that particular substance panel.

Test Status Assignment

Test statuses can be available for *all* test classes, or limited to a specific test class (or classes). To add, remove, or edit the test classes that will offer a particular test status, choose File > Substance Panel. The "Test Classes" box at the bottom of the window will allow you to assign a test status to "All Classes," or with the "All Classes" box unchecked, choose one or more test classes for that particular test status.

5.2 How to Enter Orders

- 1) Press the Orders button (on the main screen toolbar).
- 2) Press the + button to create a new order.
- 3) The company field will automatically be set to the "active" company. To select a different company, choose a different company from the drop-down menu, or press the > button and choose "Select Company."
- 4) The participant field will automatically be set to the current participant*. To select a different participant, choose one from the drop-down menu, or press the > button and choose "Select Participant."
- 5) Choose the appropriate test type. If the participant has open random tests, a new window will open to allow you to select an open random test to assign the order(s) to.
- 6) Select the individual requesting the order(s) from the drop-down menu next to "Requested by." The names available are all the contacts associated with the current participant's company or home base.
- 7) A check box and service name will appear in the Services box for each available test class. To create an order, place a check in the appropriate box. The appointment window will open that will allow you to enter the appropriate information. See the Appointment Entry topic for more on the appointment entry window.
- The order number will be automatically created
- The order date will automatically be set to today's date
- The user can enter specific Comments that are particular to the order, to be "shared" by all services.
 That is to say, if several services are to be performed at different locations, the Order Comments will appear on all copies of the Order Authorization forms that go to the individual locations, although each location will only see the services that are to be performed there.
- User can edit the appointment, the result, the collection site and the participant by right-clicking a service
- User can remove a service or cancel the entire order by right-clicking a service

5.3 Appointment Entry

- The collection site and lab fields will be automatically entered if defaults have been set. DrugPak will look for a default lab and default collection site in this order: participant's home base* > participant's company** > global setting***
- The panel and MRO name fields will also be automatically entered if defaults have been set.
 DrugPak will look for a default panel and MRO name in the following order: participant's company**
 > global setting****
- The panels available for a particular service are determined by the settings for each substance panel (File > Substance Panels). Each panel can be assigned to "All Classes" (via the check box), or assigned to individual test classes.
- Additional data entry fields include date, time, collector name, and sample type.
- The fields on the appointment window are linked to the same fields in the result window (i.e., the appointment window is essentially a trimmed-down version of the results screen.)
- * Home base > Result Defaults tab
- ** Company > Participant/Result Options
- *** Preferences > Global Settings > Main Module > Result Options > Default Values for New Results

^{*} If both participant window and results window are closed, the Order Entry's participant name will be blank. If just the results window is open, the participant of the current result will be used for the Order Entry's participant name. If the participant window is open, the current participant in the participants window will be used to fill the participant field in the Order Entry window (if the participants window is open, the result window's participant is ignored).

5.4 Order Entry Reports

There are two reports available for the Order Entry module: the orders report and the service authorization report.

Orders Report

This reports displays a list of orders, and includes order number, order status, test type, participant name, collection date, and collection site. The report will also indicate when a service's collection is overdue.

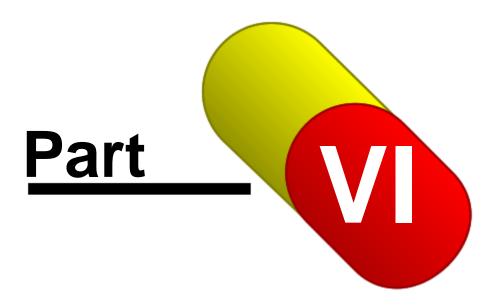
- It can be printed for a single company, a consortium, or for all companies
- It can be grouped by company, home base, collection site, laboratory, or test type
- Choose Reports > Orders > Orders to open the report settings window

Service Authorization

This report that is to be sent to the collection site, or be taken by the participant to the collection site to indicate which service(s) is/are to be performed.

- Choose Reports > Orders > Service Authorization to open the report setting window
- Service Authorization reports can be generated directly from the orders window: right-click on a service, and choose Generate Service Authorizations. From there you can generate a service authorization report for *just* the collection site assigned to the service that you right-clicked on, or generate a service authorization report for the entire order (which may have services assigned to multiple collection sites)
- In order for a service authorization report to be generated for (just) " This Collection Site", it is required that at least one contact for that collection site have a service authorization report assigned to them.
- To assign this report to a contact, or to modify the settings of an existing report, follow these steps: right-clicking a service > choose Edit Collection Site > click the ">" button within the Primary Contact* tab > choose Edit Contact > choose the Reports tab. If you do not see a Service Authorization report for this contact, press the Add Report button, and choose Orders > Service Authorization. Be sure to set the desired report settings (report destination, company scope, etc.) Additionally, you may wish to assign the report to multiple collection site contacts. If so, choose the All Contacts tab and add the report to the desired contact(s).
- In order for service authorization reports to be generated for "Entire Order," it is required that at least one company contact or one collection site contact have a service authorization report assigned to them. (See above for steps to add a report to a collection site contact.)
- To assign this report to a company contact, follow these steps: press the ">" button to the right of the Company field > choose Edit Company Record > click the ">" button within the Primary Contact* tab > choose Edit Contact > choose the Reports tab. If you do not see a Service Authorization report for this contact, press the Add Report button, and choose Orders > Service Authorization. Be sure to set the desired report settings (report destination, company scope, etc.) Additionally, you may wish to assign the report to multiple company contacts. If so, choose the All Contacts tab and add the report to the desired contact(s).
- When generating for "This Collection Site," **all** contacts assigned to the collection site (of the chosen service) that have a service authorization report assigned to them will receive one.
- When generating for the "Entire Order," **all** company contacts **and** collection site contacts (for the **entire** order) that have a service authorization report assigned to them will receive one.

^{*} You can assign the service authorization report to just the primary contact, or to multiple contacts for a collection site or company. Choose the All Contacts tab to add the report to multiple contacts.



Miscellaneous 6

6.1 **Social Security Checking**

This window may appear automatically depending on the setting of the Social Security checking option in the Companies window, or it may be opened manually by right-clicking on the Social Security number field in the Participants window.

Search Scope

The setting of this radio group determines which companies will be searched. The options are to search the Current Company Only or Search All Companies. This option is controlled automatically when Social Security Checking is being performed automatically.

Edit Field (unlabeled)

Enter a Social Security Number to find. This value will be automatically entered if the Participants screen on the main form is visible; it will match the Social Security number of the currently displayed participant record. You can enter a new value, or simply click the Search button.



Search

Click this button to commence the search. A status panel will display the search progress.

Search Results data grid

After a Social Security Search has been completed, any matching records will be listed in a data grid. displaying Company Name, Participant ID, and Participant Name. Double-click any row in the grid to locate the corresponding participant record and display it in the Participants File screen (current company will be automatically changed, if necessary).



6 Go to Highlighted Record button

Click this button to locate the participant record corresponding to the record highlighted in the Search Results data grid and display it in the Participants File screen (current company will be automatically changed, if necessary).



Print Duplicates List

Click this button to print a report listing all the records displayed in the Search Results data grid. This report automatically prints to the window, and may be used to retain a list of all the duplicate SSN records after the Social Security Checking dialog has been closed.

If a Participant record is in edit or insert mode, the current participant's Social Security Number will not appear in the Search Results Data Grid. This serves to streamline the automatic Social Security Checking option.

Minimum System Requirements 6.2

DrugPak Network OR Single User System Workstation

- Windows Operating System 2000 PRO SP4, XP PRO SP2 OR Windows Vista for Business
- File caching turned OFF (if using peer-to-peer networking)
- Pentium 4, 1.6GHz CPU (faster if available)
- 256 MB RAM (but 512MB or more is better)
- 20 GB Hard Drive Space (but more space if keeping a lot of data locally)
- CD-ROM Drive
- 100 Base-TX Ethernet NIC
- Internet Access is required to download updates and receive technical support assistance.

 Backup Device (Tape Drive, CDR, DVDR, USB Drive, etc.): Any backup device will do as long as there is a complete backup/restore regimen in place.

DrugPak Informer

- Dedicated 56k Data/Fax Modem (or on one accessible workstation if multi-user)
- Internet access (broadband highly recommended)
- SMTP software to process outgoing e-mail (included in IIS) OR SMTP service (usually provided by your ISP)
- DP Informer cannot send e-mail through certain service providers (such as America Online or Juno) which use proprietary software, or which do not support e-mail attachments.

DrugPak Live

- Persistent "Always on" Internet connection
- Static IP address or third-party service to handle dynamic IP addressing
- Site Security Certificate is highly recommended for customer convenience, but not required. Microsoft Internet Information Server IIS (version 5.0 or above)
- SMTP software to process outgoing e-mail (included in IIS) OR SMTP service (usually provided by your ISP)
- DP Live Users: javascript-enabled web browser (Firefox 1.5+, and Netscape 7.0+, Microsoft Internet Explorer 6.0+ are currently supported)

Document Manager

- 120 GB of available storage, more if possible
- If scanning, scanner must be TWAIN-compliant
- Comparably sized backup system
- TIFF documents at 200 dpi b&w is the most efficient way to store scanned documents

Server (A dedicated server is not required, but highly recommended. The minimum requirements are):

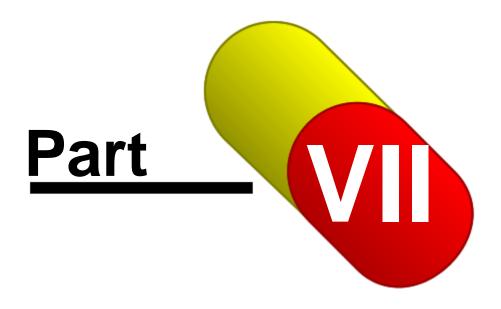
- Windows Server-based O/S (2000 SP4, 2003 SP1) File caching turned OFF!
- Pentium 4, 2.0GHz CPU
- 512 MB RAM (more if possible)
- 20 GB Hard Drive space (larger drives are recommended and are available at a very low cost)
- CD-ROM Drive
- 100 Base-TX NIC
- Backup Device (Tape Drive, DVD, USB Drive, etc.): Any backup device will do as long as there is a complete backup/recovery regimen in place.

Recommended

- If you have five or more DrugPak users, we recommend using the DrugPak Client/Server engine
- The speed of CPUs, NICs, HDDs, network switches/routers, Internet connections, etc. will all impact performance, so the faster each is, the more satisfied you will be with your system's operation.

Not Recommended (We are unable to properly test to verify problems that occur in these environments):

- Citrix environment
- Terminal Server environment
- Shared scanners (with Document Manager)
- Wireless Ethernet Adapters/Routers



7 Tutorials

7.1 How to Import Participants

Use the import wizard to import participant lists.

- The wizard will accept XLS (standard Excel workbook format) or CSV (comma separated values).
- · You may import participants for one company or multiple companies
- Microsoft Excel is required to import XLS files

Step 1: Import Settings

Use existing import settings

Choose this option to use import settings previously created/used (this options will be available only if import settings have been previously created). If this option is selected, pressing the Next button will present a list of available participant import layouts (a layout is a group of import settings such as import fields, company name, and include in randoms.)

Create new import settings

Choose this option to create a new set of participant import settings. If this option is selected, pressing the Next button will prompt you to create a name for the new import settings.

Manage import settings

Choose this option to view, clone, or delete existing import settings (this options will be available only if import settings have been previously created).

Step 2: File Type

Select the file type of the file that contains the participant list that you want to import.

Step 3: File Selection

Navigate to, and select the file that is to be imported.

Step 4: Participant Data

Data Preview column

Displayed in this column are the values in the first row of the first column of the file that you chose in the previous step.

- To view more records, use the navigation buttons near the bottom of the screen
- This preview is meant to help you identify what data is in each column, so you know which DrugPak fields to import into
- Names in separate columns (first, middle, last) can be imported directly into their respective columns

Target Field

The target field is the field in DrugPak where the each column imported data will go. Use the drop-down menus to choose the appropriate DrugPak fields.

- You must import at least the Social Security number, participant ID, other ID, or license number.
 These fields are "key" fields, and are used to uniquely identify each participant. Otherwise DrugPak has no way to differentiate an imported participant from the same participant that is already in DrugPak.
- For each piece of data in the source file that you want to import, you must select a target DrugPak
 field to put that data. Any data in the preview that is not matched with a target DrugPak field will not

be imported.

The first record is a "header" record (and will not be imported)

Check this box if the first row of the source file is used to define the contents of the file (such as name, SSN, DOT, etc.). This option will skip the header record, and start importing with the second record.

When you have linked the desired fields from the source file (data preview) to the correct field(s) in DrugPak, press the Continue button.

Step 5: Import Options

Import Into

Select the correct company scope. You may import into either the current company or multiple companies. To change the current company, press the globe button to open the Find Companies window, and select a different company. Choose Multiple Companies only when your import file has participants from multiple companies AND each participant has a valid DrugPak company ID.

Lookup Key Field

This is used to uniquely identify each participant. Specify whether to lookup existing DrugPak participants by participant ID, Social Security number, other ID, or license number.

- DrugPak will use this field to try to find an existing participant to update. If it does not find a record in DrugPak with an identical key field value, it will create a new participant.
- The lookup key field is a required field. If a record in the import file is missing the key field, that record will not be imported.
- When importing using any field other than the participant ID field, the participant ID field will be
 ignored. Participant IDs will then either be automatically incremented, or be created based on the
 Social Security number (determined by the participant ID setting of the company being imported
 into).

Convert names to Initial Caps

Check this box to convert all lower case or all upper case name and address into initial caps (e.g., JOHN SMITH or john smith will be converted into John Smith).

- Only participant name and address are affected by this option
- If the name and/or address are already in mixed case, this option will have no effect

Overwrite existing data if import field is blank

Check this box to replace existing DrugPak participant data if a field in the import record is blank. For example, an existing DrugPak participant has a hire date on record, and you import a list of participants that includes this participant - if the hire date field in the imported list is blank, checking this box will allow the import feature to **overwrite** the existing hire date with the blank hire date.

- This setting affects only the process of updating an existing participant
- Use cautiously! If you are unsure, uncheck this box.

Use participant template when inserting NEW records

Check this box to use a company's participant template values when **new** participants. If checked, the participant template will be used to supply values only when the corresponding field in the import file is blank. (i.e., non-blank values in the import file will be used preferentially over participant template values).

Terminate active existing participant when missing from import file (option available when not importing home base data)

This option is useful when you receive a list of just *active* participants for a company. With this option checked, any active participant in a company whose participant list is being imported will be marked as terminated if that participant's name is **not** in the file being imported. For example, James Q. Jones is an active participant in Alpha Trucking. You import a list of active participants into Alpha Trucking, and

that list does **not** include James Q. Jones. With the "Terminate active existing participants..." box checked, James Q. Jones will be marked **in**active.

Termination Options for Active Participants Missing from Import File (option available only when importing home base(s))

These options are available:

- Terminate ALL participants from the Company/Companies imported
- Terminate just the participants in the home bases imported
- Do not terminate anyone missing from the import file

Termination date

If the "Terminate active existing..." option (above) is checked, choose a termination date for the participants marked as terminated.

Activate (un-terminate) all imported participants

Check this box if all participants included in the import file are to be considered "Active." Uncheck this box if you will rely on the terminated field in the import file to determine each participant's Active/Terminated status.

...and mark Include in Randoms

This check box is enabled only if the "Activate all imported participants" box is checked. Check this check box if all participants included in the import file are to be considered eligible for random selections. Uncheck this box if you will rely on the RANDSEL field in the import file to determine each participant's eligibility for inclusion in random selections.

Step 5: Press the Continue Button

Step 6: Review Your Settings

You will be presented with a summary of all the settings chosen in step 4. Please review them. If any of them are incorrect, you can back up to previous steps and correct them. Once you are satisfied with your settings, press the Continue button. DrugPak will now import your participant data for your review.

Step 6: Review Your Participants

You will be presented with a grid containing the participants data about to be imported. If the total records number is not correct, you may reject the import procedure, correct the import data, and import again. If the total records number is correct, press the Accept button. If you are importing participants into just one company, you will be prompted to verify that the company is correct. Be sure that the company name is correct! If it not, press the No button, and import the file again and choose the correct company.

7.2 How to Run Randoms

If you have not already, you need to create at least one random selection profile. Please see the Random Selection Profiles topic for help with profiles.

Step 1: Choose Profile(s) for Selection

Based on the frequency chosen for each profile (on the Selection Rates Page) and the date range chosen for "Choose profiles due between" setting, profiles will be selected for random

selection (designated by a checked box to the left of the profile name). You may also manually select or unselect profiles by checking or un-checking the appropriate box. Press the All button to select all profiles; press None to unselect all profiles.

Audit Trail

Optionally edit a profile's report settings. (You must first select a profile.)

AII

Press this button to select all selection profiles

None

Press this button to unselect all selection profiles

Next

When the appropriate random selection profile(s) have/has been selected, press this button to continue to step 2 of the random selection expert

Step 2: Perform Random Selections

This window will display the profiles chosen for random selection, the number of eligible participants, the number of selected participants, and the number of drug and alcohol tests. Please verify that you have chosen the correct profile(s) and the settings are correct before continuing. If they are not, you may abort one or all profiles (see buttons along the bottom of the window).

Click the next button to perform the selection.

For each profile that has a frequency and start date selected, the starting date will be updated to the next date (e.g., a profile set to be run once per month starting September 1, will now be set to run next on October 1).

Once the random selection is complete, the **Completed!** window will appear. This window displays a list of random batches.

ΔΙΙ

Press this button to select all random batches for printing

None

Press this button to unselect all batches for printing

Unprinted

Press this button to select only batches not yet printed

Print Audit Trails

Press this button to print audit trail reports for the selected batches

Preview in Window

Check this box to preview audit trail reports in window. (This is not advisable when a large number of batches is selected for printing.)

Exclude companies whose reports are generated (available for DrugPak Informer users only)

Check this box to not print audit trail reports for companies whose contacts are configured to receive

random selection reports. For example, Alpha Trucking has a contact configured to receive the selected participants list. If the box is checked, no selected participants list will be printed for Alpha Trucking (Alpha Trucking will receive their selected participants list when their reports are generated.) However, other audit trail reports will be printed (assuming the profile is configured to print other reports). This option does not apply to contacts linked to home bases (i.e., if a contact with a random report is linked to a home base, but not a company, the company that the home base belongs to will still be included in this printing of audit trail reports).

7.3 How to Add Letterhead to Reports

- 1. Create or obtain image that you would like to appear at the top of reports
- 2. Be sure that the image is sized appropriately (approximately 670 pixels wide and fewer than 200 pixels high). If the image is too big, it is possible that your reports with the new letterhead will not print correctly. (The Scanlon Associates' Support Plan does not include assistance with image editing or manipulation. Please consult your IT staff, or the documentation for your image editing software for assistance. If you still need assistance, Scanlon Associates offers a fee-based service to help with image manipulation. Please contact the Scanlon Associates Support Department for details.)
- From the main DrugPak screen, choose Preferences > Global Settings > Main Module > Virtual Letterhead
- 4. Select the reports on which you would like the letterhead to appear. If you want the letterhead image to appear on all reports, press the Select All button.
- 5. Press the Select Image Now button, and navigate to, and select the image from step 1.
- 6. Press the Open button.
- 7. You will be prompted to test the letterhead. We recommend that you test the letterhead.
- 8. You may optionally underlay the return address on reports. This is appropriate when the letterhead image does not contain you address and/or when the image is not meant to consume the entire width of a report (i.e., your return address (set in Global Settings > Main Module > General Options > Business Address) will appear to the left of the letterhead image.). If you use this option, be sure that the image is meant to appear in the center, or right side. If it is designed to appear on the left side, or is as wide as the report, it will obscure the return address.
- 9. Close the test letterhead window
- 10. Close the Global Settings window

7.4 How to Select an Alternate

- 1. From the DrugPak main window, choose Randoms > Select an Alternate
- 2. Depending on the Preferences > User Preferences > Main Module > Optional Prompts > Would you like to lookup a batch? setting, you will either be a) asked to look up a batch, b) be presented with the Find Random Batch window, or c) be presented with the Select an Alternate window
- 3. Choose the appropriate batch from the Find a Batch window, or press the Find Batch button, then select the appropriate batch
- 4. If the batch was done for a consortium, you will be asked if you want to isolate a company. If you wish to isolate the alternates for one particular company, press the Yes button, and select the desired company.

If you send the Alternates List to your customer(s), it is possible that your customer has "selected" an alternate for you. This is not appropriate. You should allow DrugPak to choose the alternate. This is because DrugPak will choose the next alternate in random selection order (i.e., the next person that would have been selected as a primary, if your selection rate were higher). If your customer has

already sent in a participant as an alternate, then you will need to manually select the participant from the list. If this is the case, change the Search Order to Alpha Sort, SSN, or Participant ID, manually select the participant, then proceed to step 9

- 5. Press the "Pick Next Alternate" button.
- 6. If prompted with "Filter conditions have been entered, but the filter has not yet been applied. Would you like to apply the filter now?", press Yes.
- DrugPak will select the alternate participant, and present you with a confirmation: "An Alternate has been selected based on Selection ID order, and is highlighted in the grid below." Press the OK button.
- 8. The highlighted participant is the selected alternate. The alternate participant has been selected but the test record(s) do not yet exist.
- 9. Press the Drug Record button to create a drug test record for the alternate participant; press the Alcohol record for an alcohol test record for this alternate participant.
- 10.After you press either the Drug Record button or the Alcohol Record button, you will be prompted with "Random {substance} Result record does not exist for this alternate. Would you like to create this record now?" Press Yes.
- 11. The test record will be created, and you will be prompted to view the test record. If you do not need to create an additional test record for this alternate, then the process is complete. If you do need to create another test record for this alternate, press No, then proceed to the next step.
- 12. Press the appropriate other record button (i.e., Alcohol Record if you have already created a drug test record, or Drug Record if you have already created an alcohol test record)

You may wish to print a notification letter for this alternate participant. If so, follow the steps in the How Do I Print a Notification Letter for an Alternate topic.

* If you send the Alternates List to your customer(s), it is possible that your customer has "selected" an alternate for you. This is not appropriate. You should allow DrugPak to choose the alternate. This is because DrugPak will choose the next alternate in random selection order (i.e., the next person that would have been selected as a primary, if your selection rate were higher). If your customer has already sent in a participant as an alternate, then you will need to manually select

Selecting the batch

Enter the appropriate batch number in the Batch # field on the Toolbar, or click the Find button to select the batch from a list.

Finding a previously selected Alternate

Selecting a new Alternate

If you need to select a new alternate, be careful not pick someone out-of-order. Each alternate has a randomly generated "Selection ID," which determines the sequence in which alternates should be selected.

You may want to select from among the entire pool, or you may want to filter the pool to isolate a particular Company or Home Base. Contact your policy administrator to answer these questions.

DrugPak can automatically find the next alternate. Click the Pick Next Alternate button on the Toolbar, and DrugPak will examine the list (obeying your filter conditions), examine the tests file, and see which alternates do not yet have results on file. The software will then select the "next" alternate in the Selection ID sequence by highlighting it in the grid. Then it is up to you to officially select the alternate by creating Drug and/or Alcohol result records.

Creating Alternate Result Records

After highlighting the alternate in the grid, click the "Create Drug Record" or "Create Alcohol Record" buttons, at the top of the screen, to officially select the alternate. Result records will be created for the appropriate batch, and marked with the official RND Random test type.

Printing Notifications and Other Reports

Click the Printer button on the Toolbar of this window. It will display the Random Selection Audit Trail setup window. You can then reprint the Alternates list, or print Notification Letters.

7.5 How Do I Print a Notification Letter for an Alternate

- 1. From the main DrugPak screen, choose Randoms > Reprint Random Selection Audit Trail
- 2. Choose the batch number for which the alternate participant is being tested. You can press the down arrow to scroll through all batch numbers, or press the Find button and choose the batch number from the Find window.
- 3. Check just the Print Notification Letters box
- 4. Press the Modify Report Settings button
- 5. Select the "Print notification letters for" and choose "Alternate participants only"
- 6. Select the "Maximum alternates to print." This number must be set to at least 1. This number determines how many notification letters will print.

Because DrugPak does not know who the notification letter is for, notification letters will print for the first X number of alternates (X is the value chosen for "Maximum Alternates to Print" setting) - that is, if you set that value to 5, DrugPak will print notification letters for the first five alternates. You do not need to print all five letters, just select the one that you want, and print just that one. Additionally, if the random selection was performed on a consortium, the alternate for who the letter is to be printed may not happen to fall in the first 5 alternates. If that is the case, you will need to set the number higher. If you do not know where the alternate falls in the list of possible alternates, set the "Maximum Alternates to print" to the number of eligible participants for that batch (i.e., if the number of eligible participants in the selected batch was 1000, setting the "Maximum Alternates to Print" to 1000 will guarantee that the desired participant's notification letter will appear.)

- 7. Press the Apply button (if necessary)
- 8. Press the Close button
- 9. Press the Print Button
- 10.When the notification letters window appears, and you had set the "Maximum Alternates to Print" value to great than 1, you will have to find the appropriate participant. If you have relatively few pages, you can scroll through the letters using the right and left arrow buttons (near the top left of the report window). If you have printed notification letters for many participants, the fastest way to find the correct participant is to use the search tool enter the first few characters of the participant name in the box to the left of the binoculars icon, then press the binoculars icon.
- 11.Once you have found the notification letter for the correct participant, press the printer icon, and choose the Pages item (otherwise you will end up printing *all* notification letters), and select the appropriate page range (i.e., if the notification letter that you want to print is on page 73, then enter 73 in the From: field, and 73 in the To: field, and press the OK button.

7.6 How to Install DrugPak on an Additional Workstation

• From the new workstation on which you want to use DrugPak, navigate to the shared Scanlon (or DP50) directory on the server (if you don't know where that is, go to an existing DrugPak workstation

and click Help > About. Note the location next to "Application Dir." If the location is too long to fit into the About window, you'll have to click the link to see where it takes you.)

- Inside the DP50 directory there is a file called wkinst.exe (workstation installer). Run the this workstation installer. When prompted, choose the 'Install Required Drivers' option.
- Restart Windows
- If desired, remove the DrugPak icon(s) from the Desktop and Start Menu of any workstation being taken out of service (there is no uninstaller).

Keep in mind that even though you may add DrugPak to as many workstations as you like, your user license determines how many user can be using DrugPak at one time. Go to Help > About to view your user level.

7.7 How to Move DrugPak

Because you will need to close DrugPak to perform this task, it is recommended that you print this topic, then follow the instructions.

Moving DrugPak from a workstation to a server

- Shut down all copies of DrugPak, Transmission Center
- Make a note the current location of DrugPak. By default, it is stored in C:\Scanlon\DP50. To find DrugPak's location, click Help > About from the DrugPak main module.
- Click the link to the right of Application Dir. The DP50 directory in will open in Windows Explorer.
- Navigate up one level to the Scanlon directory
- Copy the Scanlon directory to the server
- From the new server, share the Scanlon directory. Ensure the network users have read/write permissions to the shared directory and all sub-directories. (Consult your IT staff for assistance with this.)
- From the **each and every** existing DrugPak workstation, navigate to the newly located Scanlon \DP50 directory and run wkisnt.exe. (The workstation installer.) If you wish to access DrugPak from the server desktop, you will also need to run the workstation installer on the server. (When prompted, always choose the 'Install Required Drivers' option.)
- After the installation is complete, verify DrugPak is running from it's new location by clicking Help >
 About and checking the Application Dir and Data Dir. The links to the right of Application Dir and
 Data Dir should reflect the **new** location for DrugPak. If the old location appears next to Application
 Dir and Data Dir, it is likely that the workstation setup has not yet been run on that particular
 workstation. If that is the case, navigate to the **new** location of DrugPak, and run wkinst.exe.
- Go back to the original DrugPak workstation or server, make a backup of the Scanlon folder, and remove the original (this prevents users from inadvertently navigating to the old DrugPak location)

7.8 Backing Up Data

Unpredictable factors can cause data loss at any time, and system backups can help you minimize the damage. *Every business which relies upon computerized data storage should make regular backup copies of its data. We recommend daily data backups.*

DrugPak does *not* include a utility to back up your data, but there are many complete and economical off-the-shelf backup systems available. For speed, convenience, and security, we recommend a tape backup system. Such systems are designed to provide thorough and flexible backup options.

What Do I Backup?

You should back up the entire scanlon\dp50 folder. This folder contains all DrugPak data and all DrugPak program files.

Where is the scanlon\dp50 Folder?

From the main DrugPak screen, choose Help > About. Click the link to the right of Application Dir. That will open the scanlon\dp50 folder in Windows Explorer. This is the folder that needs to be backed up.

How Often Should I Back Up My Data?

Because data loss is rarely discovered within 24 hours, for maximum security you should backup your data with a rotating backup library that saves at least three generations of data. You should also backup your programs and data before installing any program update that will make modifications to your database (this drug testing management software warns you with on-screen messages of this situation during the update process). A knowledgeable IT consultant can devise a complete backup routine to protect your system's configuration, programs, and data.

The following sample 10-tape rotation system would provide excellent coverage for recovering from data loss which occurred at an undetermined point in the past.

4-tapes: Label these tapes MONDAY, TUESDAY, WEDNESDAY, and THURSDAY. Every day, use the appropriate tape to perform your system backup, overwriting the previous week's data.

5-tapes: Label these tapes FRIDAY1, FRIDAY2, FRIDAY3, FRIDAY4, and FRIDAY5. Every Friday, use the appropriate tape to perform your system backup, overwriting the previous month's corresponding FRIDAY# tape. Store these tapes off-site, in case of fire.

1 tape: Label this tape QUARTERLY. Every quarter, use this tape to perform a system backup, overwriting the previous quarter's backup.

How Do I Backup DrugPak and My Data?

We can tell you what to backup, but not how. There are too many different software and hardware solutions for us to be of any assistance. Please refer to your IT staff and/or backup documentation for assistance.

7.9 How to Configure IIS for DP Live

This document assumes that Microsoft IIS and DP Live have already been installed, and that the user has a working knowledge of IIS. For more assistance with installing/enabling of Microsoft's IIS, please refer to you IT staff or Microsoft's documentation:

IIS 5.0: http://www.microsoft.com/technet/prodtechnol/windows2000serv/technologies/iis/default.mspx IIS 6.0:

http://technet2.microsoft.com/WindowsServer/en/library/10135f7a-144b-4ec6-9ad0-d6d441e50bd01033.mspx?mfr=true

Additionally, Scanlon Associates' support contract does not include assistance with installation of, or training for Microsoft IIS. For a fixed fee of \$129, Scanlon Associates can assist in the deployment of IIS. For more information, please contact Scanlon Associates' Technical Support Department at 814-238-5103 x220.

Configuring IIS 6.0 to run DP Live

These instructions will work for both IIS 5.0 and IIS 6.0 (where necessary, we have included required extra steps for IIS 6). To determine which version you are running, open the IIS management window and choose Help > About Internet Information Services...

- 1) Create a virtual directory pointing to the ...\dp50\dplive\images directory. Call it dplimg.
- 2) Create a virtual directory pointing to the ...\dp50\dplive\bin directory. Call it **bin**. If you already have a virtual directory by that name, please go to step 4.
- 3) When creating the bin directory, be sure to check the Execute box in the Access Permissions step.
- 4) Choose Properties of the bin virtual directory (right-click the bin directory)

- a) Choose the Directory Security tab
- b) Press the Edit button in the Anonymous Access and Authentication Control section
- c) Check the Anonymous Access box (if it is not already)
- 5) The User Name is probably going to be something like *IUSR_{computer name}*. This user account needs read/write access to a the Windows directory and the dp50 directory. There are two options to solve this:
- 6) Give the IUSR {computer name} user read/write permission to the Windows and dp50 directories, or
- 7) Select a different user with read/write permissions to the Windows and dp50 directories
- 8) Extra steps for IIS 6:
 - a) In the IIS Manager window, click on Local Computer (from the list on the left)
 - b) Click Web Service Extensions (from the list on the left)
 - c) Choose "All Unknown ISAPI Applications" (from the list on the right)
 - d) Press the Allow button

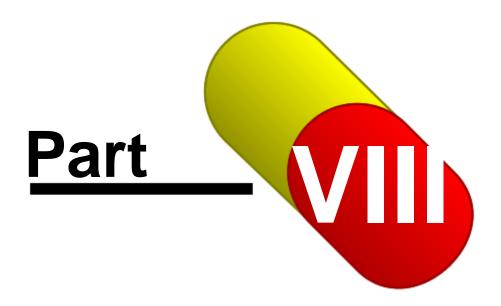
Running IIS

- 1) From the IIS management window, choose the computer name
- 2) Choose Action > All Tasks > Restart IIS
- In the Stop/Start/Reboot window, choose Restart Internet Services on {computer name} and press the OK button
- 4) Once IIS has restarted, choose {computer name} > Web Sites > {web site name likely DP Live) > bin. In the right-hand panel, right-click on dplive.dll and choose browse. DP Live may take a minute to initialize, but soon you should see the DP Live login screen.

Installing updates to DP Live

You cannot install updates to DP Live while DP Live is loaded in memory. To unload DP Live from memory, you must stop the IIS service. To stop the IIS service, from the Start menu, select Run, then enter "iisreset /stop". After installing the DPLive update restart IIS: from the Start menu, select Run, then enter "iisreset /start".

For more information about securing IIS, please see this document: http://www.nsa.gov/snac/os/win2k/iis_5_v1_4.pdf (version 5.0) or http://www.nsa.gov/snac/os/win2003/MSCG-001R-2003.PDF (Windows Server 2003 and IIS 6.0)



8 Glossary

8.1 Alternate

If one or more Primary participants in a random selection is legitimately unable to participate in the selection, Alternates may be used to replace them. A selection of Alternates can help keep your selection quota on-track, eliminating the need to perform "adjustment" randoms at the end of the quarter or year. Alternates are randomly selected during the selection process and printed in selection # order. If an alternate is required to "step-in," the testing administrator need only read from the top of the Alternates Listing to determine who is next in the selection order, and use the Randoms | Select an Alternate feature to create the result records.

8.2 Batch

A batch is a group of drug screenings from a group of individuals. These screenings will have certain common characteristics including the batch serial number (or Batch Number). Each participant may have only two test records per batch: one for drugs and/or one for alcohol. Different test types may be included in the same batch, except for Random (RND) batches. Many DrugPak users use the system date as the batch number (for non-RND tests).

8.3 Collection Site

A collection site is the place where the sample was contributed by the participant. This may be your office, at a private collection site, or on-site at your client's office.

8.4 Consortium

A consortium is a group of companies that have been associated for the purposes of creating a single eligible pool for random selections and/or for printing cross-company statistical analyses and other reports.

8.5 Current Company

The application's "Current Company" indicates which company's Participant and Test Result records are available on the main screens. This is not necessarily the same company as displayed on the Companies Page. The application's current company is always displayed at the bottom left of the status bar.

8.6 Disposition

The disposition of a participant describes the action taken by the company toward the participant after the drug test results were reported. Disposition results are printed on summary reports. Typical dispositions might be participant not hired, participants terminated, no action taken, and so forth.

8.7 Eligible Pool

The group of participants from which random selections are made. In the random selection process the computer first creates the eligible pool, then makes random selections from the pool. Participants can be made eligible for selection based upon a user-selected configuration of eligible Companies, Home Bases, Occupations, Pool Groups, and DOT reporting status.

8.8 Filter

A filter is an expression which controls what records are visible in a dataset. The expression contains a conditional phrase describing possible values for fields in the filtered dataset. In order for a record in

a filtered dataset to be visible, the filter expression must evaluate to TRUE when applied to the values in the record. For example, here is a very simple filter expression:

CO_ID = 'DEMO'

The above expression requires that the CO_ID field in the record must be equal to DEMO. Any records whose CO_ID field is not DEMO will not be visible in the filtered dataset. (This example would only work on a table that has a field called "CO_ID")

8.9 Home Base

Home bases are used to distinguish various locations of a company's operations. A code for each home base must be entered in the Codes File, and one of these codes is required in each Participant's Testing Information record. If a company has only one location, no home base is required for it's participants.

8.10 Initial Positive

At a laboratory, if a result's initial screen is positive, but subsequent GC/MS testing returns a negative result, the lab will report the result as a negative. This is an "initial positive." The lab's client never knows which specific results were "initial positives," but laboratories often provide a report of how many initial positives were encountered in a given time period.

8.11 **ISAPI**

The Internet Server API (ISAPI) is a Windows-specific alternative to the Common Gateway Interface (CGI). Originally proposed by Process Software, ISAPI has been adopted by Microsoft as the standard plugin interface for its IIS Web server.

While CGI scripts have the advantage of being interpretive and easy to maintain remotely, it has a number of performance drawbacks, namely that CGI plugins generally need to be loaded into memory each time they are used, and require slow standard input/output (stdio) and environment variable mechanisms to pass information between HTML forms and the Web server.

ISAPI has several advantages:

- Simple and easy to implement
- ISAPI modules can be pre-loaded in memory and run "in-process" for better performance
- Uses memory variables and direct socket calls for improved performance
- Compiled for optimal performance on the target Web server
- Microsoft published an extensive benchmark comparing performance among Web servers; ISAPI played a key role in the high marks attained by their server.

The only real down side is that ISAPI plugins are not portable. But since this only impacts servers, and ISAPI plugins are so easy to create, this is not a substantial road block to their use.

While not Common Object Module (COM) compliant, Microsoft has grouped ISAPI under its Active X umbrella.

ISAPI is supported by BlueFace's Falcon Web Server, Microsoft's IIS server, NetManage's Personal Web Server, O'Reilly's Web Server, and a number of other popular NT Web servers. Shareware ISAPI shims are also becoming available for other NT-based Web servers, such as Netscape and Apache servers.

8.12 Occupation

An occupation defines a participant's job description. Occupations can be used to control participant eligibility in a random selection profile. Occupations are also important for DOT statistical reporting.

8.13 Pool Group

These codes allow you to stratify random selections into groups with special characteristics. For example, you might define a random pool group consisting of all participants from a certain state. Random pool group codes can be shared by multiple companies.

For most applications, however, Random Pool Groups are unnecessary since pools can be constructed without them. Instead it is usually sufficient to use Company, Occupation, Home Base, and DOT status as selection criteria.

8.14 Primary Participant

The designation "Primary selection" or "Primary participant" indicates whether an individual has been selected to contribute a specimen for a particular random drug and/or alcohol screen. This terminology serves to distinguish such individuals from Alternate participants. The term "Primary" will appear with the **RND** Random test test-type description on the Results screen and on Results reports.

8.15 Substances

A substance is a drug or drug metabolite particularly sought by a drug test. Up to 14 substance codes (from the Codes File) can be entered in each test result record to indicate which substances were selected for screening in that particular test. Codes for substances required in DOT regulated testing are included with the system; however, you can also add your own if the need arises. Alcohol is treated separately from other substances, and it is not possible to add the code ALC to a substance panel.

8.16 Test Type

Test types refer to the policy under which the test is conducted, or the reason for the test. Typical test types are periodic, pre-employment, random, and reasonable cause. Codes for the most common test types are supplied with the system; however, you can also add your own.