

# ezFMD Admin Guide

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## What is covered in this guide

This ezFMD Admin (Administrator) Guide is intended for the use of the key person in an organisation to administer other users and roles, location keys, etc. and is intended for use by persons familiar with ezFMD and (at least) medium IT skills.

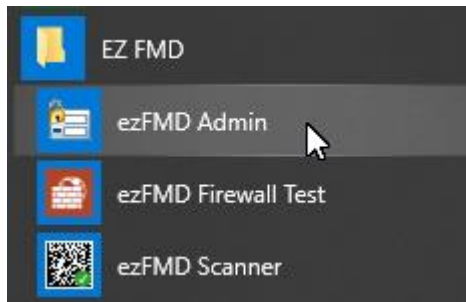
A User Guide, describing the normal use of ezFMD is available from the Download section at [www.ezFMD.com](http://www.ezFMD.com)

**The Falsified Medicines Directive - FMD - is applicable to prescription medicines only.**

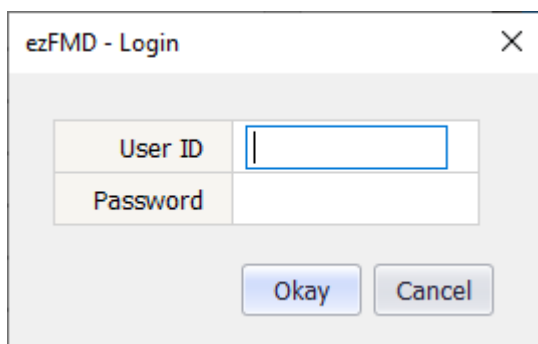
Other products, such as OTC medicines and medical devices **should not be scanned** for FMD purposes.

## Opening the ezFMD Admin Tool

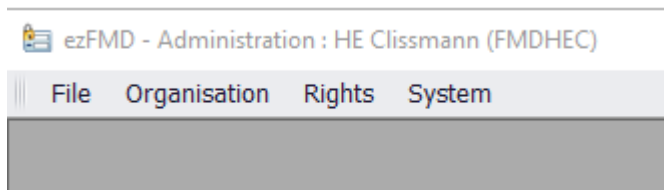
From the Windows / Start icon on the left, select ezFMD Admin Tool from the ezFMD group:



On the initial screen when first run, enter the User ID as ADMIN and the default password and press Okay:

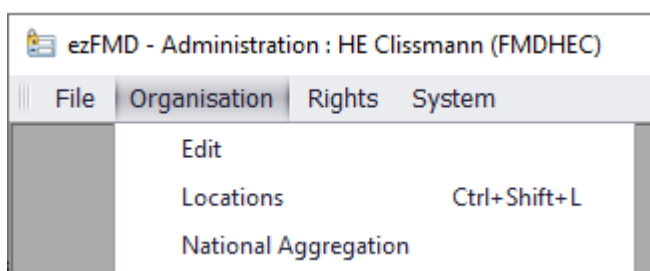


On the main screen, the principle options are:



## Edit Organisation

The options are



Organisation > Edit lets you edit the name and address of the Organisation:

(Note – the organisation Type cannot be edited by the Admin – this can only be edited by contacting [support@ezFMD.com](mailto:support@ezFMD.com))

Organisation > Locations lets you edit the locations or PCs in use in the Organisation:

Name	Client ID	Client Secret	Default
TEST01	3d62765a-563f-403a-b8f0-...	8a87709d-c427-4b0c-a27a-...	<input type="checkbox"/>
TEST02	f7052dd4-bbc6-422a-a662-...	2419fc61-3046-4546-bf15-...	<input type="checkbox"/>
WH LIVE	49c91d05-631e-4859-bb22-...	7fe55fd5-00b1-4724-99d2-...	<input type="checkbox"/>
WH2 LIVE	cb44da7e-8e78-4f92-a86d-...	a56376b5-7fef-45b1-a3f6-...	<input checked="" type="checkbox"/>
	ee576625-d38f-4f22-b9a6-...	6aa55751-5459-453a-9278-...	<input type="checkbox"/>

On the screen above, you can rename location / PC names, add with the Client ID and Client Secret obtained from the NVO and set the default for an organisation (used during a fresh install).

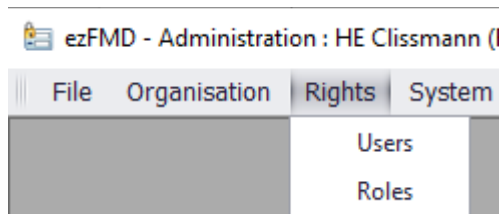
Organisation > National Aggregation is reserved for those organisations subscribing to aggregation. It allows you to edit the fields below. **These should only be changed in consultation with [support@ezFMD.com](mailto:support@ezFMD.com), or aggregation files will no longer be retrievable within your organisation!**

## Edit Rights (including users and roles)

This is likely the section most often used.

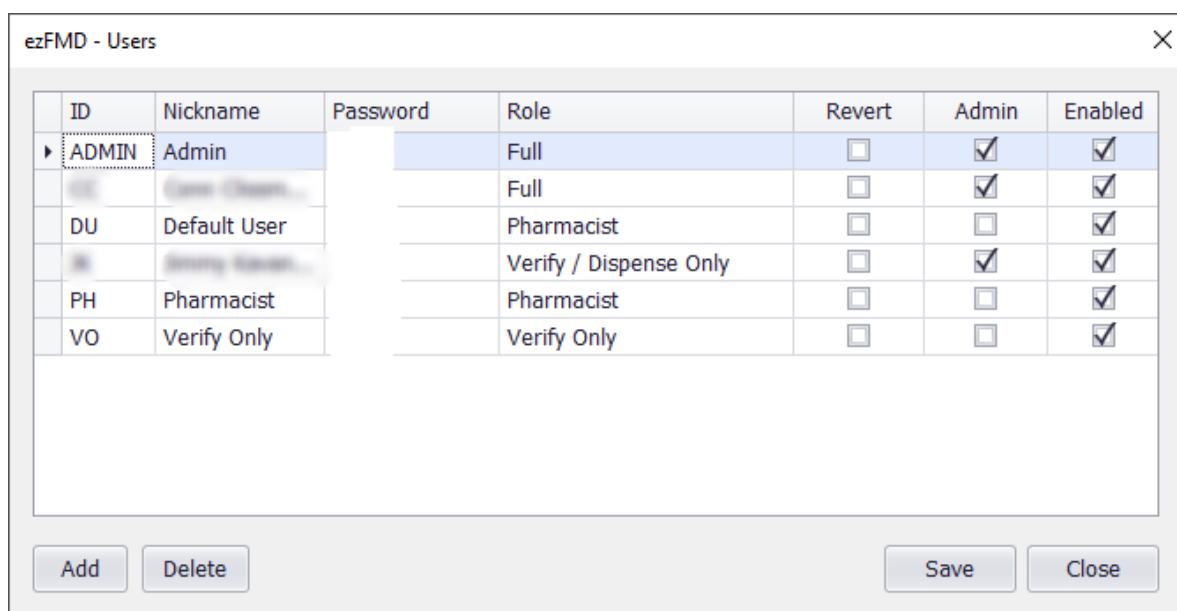
**TIP:** It may be useful to create Roles before adding / editing Users, as each User must have a Role assigned to them.

The options are:



### Edit Rights > Users

The screen shows the users set up for this organisation:



If you click on certain fields, you can edit these fields - ID is set when the user is initially added. You can edit the Nickname, the password, the Role (from a drop-down list of roles – see next section on Roles) and tick on or off for Revert, Admin, and Enabled.

In this example, the user ID VO has been assigned the role Verify Only and is not an Admin.

**Revert:** On the main screen of ezFMD, revert to the default action of this user after every scan.

**Admin:** indicates this user is an Admin with associated rights, including the ability to download the History for the entire Organisation.

**Enabled:** Indicates this user is currently enabled – you may wish to disable a user for longer leave periods or any other reason applicable in your organisation.

Use of the **Add** or **Delete** buttons add or delete users, and the **Save** button saves changes made.

## Edit Rights > Roles

The screen shows the roles set up for this organisation:

Role Name	Rights	Default
Full	Verify, Dispense, Recommission, Free Sample, NCA...	Verify
Pharmacist	Verify, Dispense, Recommission, NCA Sample	Dispense
Verify / Dispense Only	Verify, Dispense	Verify
Verify Only	Verify	Verify

Role Name	Full		
FMD Rights	<input checked="" type="checkbox"/> Verify	<input checked="" type="checkbox"/> Dispense	<input checked="" type="checkbox"/> Reactivate
	<input checked="" type="checkbox"/> Sample NCA	<input checked="" type="checkbox"/> Sample - Free	
	<input checked="" type="checkbox"/> Checked-Out	<input checked="" type="checkbox"/> Exported	<input checked="" type="checkbox"/> Locked
	<input checked="" type="checkbox"/> Stolen	<input checked="" type="checkbox"/> Destroyed	
Default	Verify		
Permanent Action	<input checked="" type="checkbox"/> Password Required	Valid For (mins)	1
Download History	<input checked="" type="checkbox"/>	Download Type	All Locations

Buttons: Add, Delete, Save, Close

First select a role by clicking on it ("Full" has been selected above) at Area 1.

The settings for that role are shown and can be change in Area 2.

**The individual FMD Rights** can be toggled for the selected role. *(The full list is available to wholesalers as shown above – pharmacies will see all but the first 4 options greyed out as the remaining Rights are provided for in the FMD legislation for use in wholesalers only.)*

Example: If a wholesaler who does NOT hold a licence to export medicines from the EU is setting up roles, they may wish to disable (untick) Exported as an option, in order to minimise the risk of selecting this action in error during use of ezFMD.

**Default** indicates the default action for this role when ezFMD starts. For users in wholesalers Verify is a popular default; for users in pharmacies Dispense / Supply is most popular. Any of the enable FMD Rights for the current role will be shown in the drop down list.

**Permanent Action** if enabled requires a password before a non-reversible action is to be performed (Such as mark a pack Destined for Destruction.) This is not applicable in pharmacies, as all actions may be reversed using the Reactivate option. **Valid for (mins)** indicates for what period the action may be performed after the password has been entered.

**Download History** if enabled allows this role to download the history of scans performed.

**Download Type** offers two options

Download Type	All Locations
	Right
	Current Location
	All Locations

**Current Location** limits the downloads to this location / PC ID (See *Organisation > Locations*)

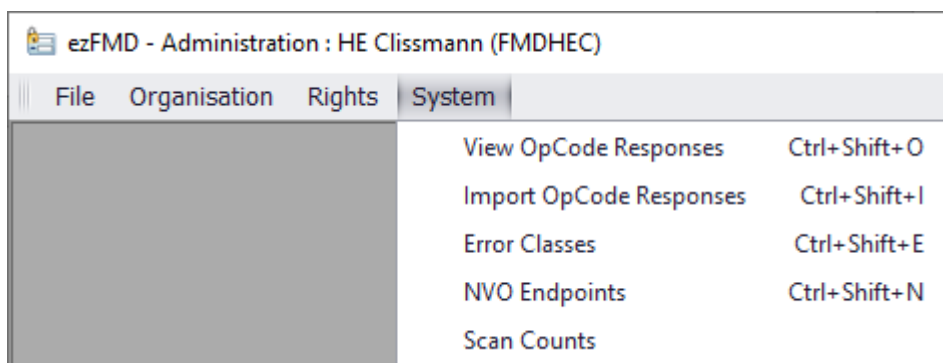
**All Locations** extends the downloads to all locations / PC IDs in the Organisation.

Use of the **Add** or **Delete** buttons add or delete roles, and the **Save** button saves changes made (Area 3).

## System

System is primarily designed for use following a request to do so from [support@ezFMD.com](mailto:support@ezFMD.com).

The options are:



**View OpCode Responses** will display the overrides for the “Traffic Lights” of green, amber and red for each reply (“OpCode”) available from the IMVO.

**Import OpCode Responses** will import a fresh file containing overrides for the “Traffic Lights” of green, amber and red for each reply (“OpCode”) available from the IMVO.

**Error Classes** provides for editing the error classes (Okay, Caution, Stop – Green, Amber, Red)

**NVO Endpoints** provides for the editing of the address(es) of where the NVO database is to be queried.

**Scan Counts** provides a quick summary of activity for the entire organisation:

Scan Counts	
Today	261
This Week	306
This Month	412
This Year	412
Total	9,047

Close

## Appendix 1 – Sample uses of Users and Roles

### Scenario 1 – Goods In at a wholesaler

The RP in a wholesaler wants to ensure that the operative(s) using ezFMD in Goods In can only Verify goods and not accidentally mark them as Supplied / Dispensed.

Step1 – the RP sets up a new Role called GoodsIn with the only allowed FMD Rights as Verify – all others are disabled. (See [Roles](#) – Area 2). They also limit the download history to the Current Location (PC), further down on the same screen.

Step 2 – the RP then adds a [user](#) GI with the nickname Goods In and the role assigned is GoodsIn (from Step 1). They make sure Admin is not ticked, as they do not want this user type to be able to use the admin tools.

Step 3 – On the PC in Goods In, when starting ezFMD, the RP holds down the {Ctrl} key and the Startup Wizard screen comes up. A single click on Next bring them to the screen which allows them to select the Default User and they select GI from the drop-down list. Pressing (only) Next 4 times until they see the Finish button closes the Startup Wizard and ezFMD starts in the normal way. This PC is now set up as the RP wished.

### Scenario 2 – Goods In at a hospital

The Chief Pharmacist in a hospital pharmacy wants to ensure that the operative(s) using ezFMD in Goods In can only Verify goods and not accidentally mark them as Supplied / Dispensed.

Step1 – the Chief Pharmacist sets up a new Role called GoodsIn with the only allowed FMD Rights as Verify, Dispense and Reactivate – the other FMD Right of “Sample (for) NCA” is disabled. They ensure that Dispense is the Default action. (See [Roles](#) – Area 2). They also limit the download history to the Current Location (PC), further down on the same screen.

Step 2 – the Chief Pharmacist then adds a [user](#) GI with the nickname Goods In and the role assigned is GoodsIn (from Step 1). They make sure Admin is not ticked, as they do not want this user type to be able to use the admin tools.

Step 3 – On the PC in Goods In, when starting ezFMD, the Chief Pharmacist holds down the {Ctrl} key and the Startup Wizard screen comes up. A single click on Next bring them to the screen which allows them to select the Default User and they select GI from the drop-down list. Pressing (only) Next 4 times until they see the Finish button closes the Startup Wizard and ezFMD starts in the normal way. This PC is now set up as the Chief Pharmacist wished.

### Scenario 3 – Returns area at a wholesaler

In a busy wholesaler’s premises, there is a dedicated area for Returns where a copy of ezFMD is installed on a PC. The RP in that wholesaler wants to ensure that the operative(s) using ezFMD in Returns can only Verify, Reactivate or Mark for Destruction returned goods and not accidentally mark them as Supplied / Dispensed or any other status.

Step1 – the RP sets up a new Role called Returns with the only allowed FMD Rights as Verify, Reactivate or Mark for Destruction – all others are disabled. (See [Roles](#) – Area 2). They also limit the download history to the Current Location (PC), further down on the same screen.

Step 2 – the RP then adds a [user](#) RN with the nickname Returns and the role assigned is Returns (from Step 1). They make sure Admin is not ticked, as they do not want this user type to be able to use the admin tools.

Step 3 – On the PC in Returns, when starting ezFMD, the RP holds down the {Ctrl} key and the Startup Wizard screen comes up. A single click on Next bring them to the screen which allows them to select the Default User and they select RN from the drop-down list. Pressing (only) Next 4 times until they see the Finish button closes the Startup Wizard and ezFMD starts in the normal way. This PC is now set up as the RP wished.

#### Scenario 4 – Haematology Labs at a hospital

The Lab Manager in a Haematology Lab in a hospital wants to ensure that the operative(s) using ezFMD in the Labs default to Verify goods and not default to mark them as Supplied / Dispensed.

Step1 – the Lab Manager sets up a new Role called Lab Users and makes no changes to the allowed FMD Rights. They ensure that Verify is the Default action. (See [Roles](#) – Area 2). They also limit the download history to the Current Location (PC), further down on the same screen. This ensures the history they download relates to the current PC.

Step 2 – the Lab Manager then adds a [user](#) LAB with the nickname Labs and the role assigned is Lab Users (from Step 1). They make sure Admin is not ticked, as they do not want this user type to be able to use the admin tools.

Step 3 – On the PC(s) in the Lab, when starting ezFMD, the Lab Manager holds down the {Ctrl} key and the Startup Wizard screen comes up. A single click on Next bring them to the screen which allows them to select the Default User and they select LAB from the drop-down list. Pressing (only) Next 4 times until they see the Finish button closes the Startup Wizard and ezFMD starts in the normal way. This PC is now set up as the Lab Manager wished.