

# Instrument Manager™ Basics

## System Build, Use and Maintenance

### Course Description

This course provides basic training covering the installation, configuration, operation and troubleshooting of Instrument Manager™. It covers basic features and functionality of the Instrument Manager™ core product: drivers, device configuration, connection assignment, minor troubleshooting, Notifier, archiving, backup/restore, security, and basic use of the Specimen Management module.

### Prerequisites

Participants should have an understanding of their laboratory workflows and operation of their Laboratory Information System (LIS) for transmission of test orders, receipt of results and comments from laboratory interfaces.

### Course Agenda

#### Day One: 9:00AM - 3:30PM

Welcome and Introductions  
Participants' Learning Goals  
IM's role in laboratory workflow  
System Installation  
*Hardware Options*  
*Software: Initial and Upgrades Overview*  
*License files*  
Device Configuration  
*Driver Acquisition & Required Files*  
*Driver Properties*  
*Test Code Mapping*  
*Fluid Code Mapping*  
*Error Code Mapping*  
*Instrument ID mapping*  
*Configuring Purge*  
*Test, Fluid, Error, & Instrument ID code customization*  
Creating Connections  
*Connection Properties*  
*Destination lines*  
*Device level Purge options*  
*Advanced Options*  
*Device Settings*

#### Day Two: 9:00AM - 3:30PM

Review of Data Flow  
The Status Display Screen  
*Queue Manager (Qmgr)*  
*Connection status*  
Communications Troubleshooting –  
Diagnostics  
*Status Display*  
*Communication Trace feature*  
*Specimen Event Log*  
*System Log*  
Backup and Archive Data  
*Backup and Archive Setup*  
*Change the location of Backup and Archive files*  
Security  
*General Security Settings*  
*Users and Groups*  
*Members and Owners*  
*Controlling access to features and connections*  
*Password Maintenance*  
Available Reports  
*License Information*  
*Configuration Options and Mappings*  
*Coded Entry Setup*  
*Available Drivers and Connections Summary*  
*Drive Space Usage*

#### Day Three: 9:00AM - 3:30PM

Notifier  
*Service Profiles*  
*System Predefined Events*  
*User Defined Events*  
*Scheduling Notifications*  
Specimen Management  
Configuration  
*Clustering*  
*Clustering and pseudo-clustering comparison*  
*Holding tests for manual download*  
*Test/Profile Setup*  
*Specimen ID algorithm*  
*Coded Entry*  
Specimen Management  
*SM Workspace*  
*Default Workspaces and Filters*  
*Security Considerations for SM Workspace*  
*Editing an Existing Workspace*  
*Creating a New Workspace*  
Other Specimen Management Features  
*Patient and Order Management*  
*Rapid Order Entry*  
*Manual Results Entry*