

# Instrument Manager™ Fundamentals

## For Existing Customers

### Course Description

Participants will learn use of IM, to edit or add configurations and connections; edit Users and Group Security permissions; troubleshoot and resolve communication issues between IM and connected devices.

*NOTE: For customers with IM in production use, to prepare for upgrades or train staff new to IM. **Course is not for persons preparing to install or build new IM systems.***

*Such persons should attend 3 day workshop for Instrument Manager Basics: System Build, Use and Maintenance.*

### Prerequisites

Understanding of participant's laboratory workflows, and operation of their Laboratory Information System (LIS) for transmission of test orders, and receipt of results and comments from laboratory interfaces.

Knowledge of participant's existing Instrument Manager system details. Such as optional licensed features (i.e. Specimen Management, Rules, Moving Averages, etc), existing configurations/connections, and planned changes or additions to their IM system.

### Course Agenda

Virtual Sessions: 3 Days 1:00PM - 5:00PM

Classroom Sessions: 2 Days 9:00AM - 3:30PM

Welcome and Introductions

Participants' Learning Goals

IM's role in laboratory workflow

License Keys and Drivers:

*Acquisition and loading of required files*

Drivers, Configurations and Connections:

*Purge and Device Configuration Properties*

*Mapping – Test, Fluid and Error Codes, and Instrument IDs*

*Creating Connections – Properties and Device Settings*

Data Flow for Requests and Results

The Status Screen

*Toolbar Options and Display Grid*

*Basic Troubleshooting Using Status Screen Details*

Communications Troubleshooting: Diagnostics Menu

*Specimen Event Log; Communication Trace; and System Log*

Notifier Function:

*Setting up Profiles*

*User Defined Events and System Predefined Events*

*Scheduling Notifications*

Security:

*Setting up Groups and Adding Users*

*Controlling Access to Features and Connections*

Backup Setup

*Automatic Backup Process*

*Manual Backup Process*

Specimen Management Configuration:

*Set up and uses of Tests and Profiles, and Specimen ID Algorithms*

*Patient Order Management*

*Coded Entries*

Specimen Management Workspace:

*Review of Pre-Set Workspaces*

*Default Filters and Creating New Filters*

*Security Considerations for SM Workspaces*