
Broadlane Page Content: Administration



Administration

Intro to section This section contains tools for cross-referencing products. It is available only to users with the appropriate administrative security rights within the Internal Audit System. If you want to know more before you begin, click [Help](#).

Add/Edit Cross-References – 6

[wireframe = may_16/index.html]

Instructional Narrative The Search Products tool allows you to find a product entry either directly by ID or keyword or indirectly by filtering according to supplier, discipline, type, or status.

Choose Products – 6a

[wireframe = may_16/index.html]

Instructional Narrative To search for a product, enter the product's ID number into the Search Products text box and click [Search](#).

You can also search by entering a keyword (e.g. surgical gauze) into the Search Products text box, selecting the Keyword radio button, and clicking [Search](#).

Filter your search by selecting options from the Supplier, Discipline, Type, or Status drop-down menus.

Search Results – 6b

[wireframe = may_16/search_results_collapse.htm]

Instructional Narrative Search results can be sorted by clicking [Product Number](#), [Description](#), or [Validated](#).
Click the + next to a product to view its cross-references.
Click [Expand All](#) to view all cross-references.
Click [Collapse All](#) to view just the product search results.

Update Cross-references Instructional Narrative

To change a cross-referenced product's type, select a new option from that product's Type drop-down menu. (AE: Actual Equivalent, FE: Functional Equivalent, SE: Similar Equivalent)
Click Save to save changes.

Delete Cross-references Instructional Narrative

To delete a cross-reference, select the Delete check box for that cross-reference, and then click Save.

Search Again Instructional Narrative

If your search does not return satisfactory results, try Search Again using different information.

Search Tips:

- If your search returns too many results, try narrowing your search by selecting relevant options from the Supplier, Discipline, Type, or Status filters.
- If your search does not return the desired product entry, try expanding your search by selecting fewer filters or searching by keywords instead of by product ID.

Add New Cross-Reference – 6c

[wireframe = may_16/search_results_collapse.htm]

Instructional Narrative

To add a new cross-reference to a product, click Add in the appropriate row of the Add New CR column.

Search for Cross-reference Products Instructional Narrative

To search for a cross-reference for a product, enter the product's ID number into the Search Products text box and click Search.

Instructional Narrative
[may_16/add_collapse.htm]

You can also search by entering a keyword (e.g. surgical gauze) into the Search Products text box, selecting the Keyword radio button, and clicking Search.

Filter your search by selecting options from the Supplier, Discipline, Type, or Status drop-down menus.

Select and Add Products Instructional Narrative

Search results can be sorted by clicking Product Number or Description.

Instructional Narrative
[may_16/add_middle_collapse.htm]

Select the check box to choose each product destined to become a cross-reference.
If necessary, click View Selected to view a list of all selected products. This is useful when the list of products is too long for you to see all of your selections.)
Click Add Selected to add the new cross-references.

Cross-Reference List – 6d

[wireframe = may_16/add_final.htm]

Instructional Narrative

If necessary, filter the list of cross-references by selecting an option from the supplier, discipline, type, or cross-reference creation drop down menus. Then click Filter.

Set each selected product's cross-reference type by selecting an option from the product's Type drop-down menu. (AE: Actual Equivalent, FE: Functional Equivalent, SE: Similar Equivalent)

If necessary, select the Remove check box for a new cross-reference to remove it from the list.

Click Save to save changes.

Validate Cross-References – 6e

[wireframe = may_16/validate.htm]

Instructional Narrative

This section contains tools for validating new product cross-references.

It is available only to authorized users.

If you want to know more before you begin, click Help.

Edit, Validate, Reject Cross-refs

To search for a product, enter the product's ID number into the Filter View text box and click [Filter](#).

You can also search by entering a keyword (e.g. surgical gauze) into the Filter View text box, selecting the Keyword radio button, and clicking [Filter](#).

Filter your search by selecting options from the Supplier, Discipline, or Type drop-down menu boxes.

Search results can be sorted by clicking [Product Number](#), [Description](#), or [Validate](#).

Click the + next to a product to view its cross-references.

Click [Expand All](#) to view all the cross-references.

Click [Collapse All](#) to view just the search results.

Click the Validate check box for each cross-reference you wish to validate.

If necessary, select an option from the Reject Reason drop-down box to reject a cross-reference.

If necessary, change cross-reference type by selecting a new option from the product's Type drop-down menu box and checking to see that the product's Validate check box is checked. (AE: Actual Equivalent, FE: Functional Equivalent, SE: Similar Equivalent)

Click [Save](#) to save changes.

Import/Validate Products – 7

[wireframe = may_16/import_data.htm]

Instructional Narrative

This section contains tools for importing new product data files from a supplier into the database and validating them.

It is available only to authorized users.

If you want to know more before you begin, click [Help](#).

Choose New Product File – 7a

[wireframe = may_16/import_data.htm]

Instructional Narrative To import new product information, enter the file location into the Data File field and press Enter. You can also browse for the file by clicking the Browse button and navigating to where the file is located.

Click [Preview Data](#) to view a list of the newly imported products.

Import Product Summary – 7b

Review New Products To filter the list, choose an appropriate option from the Supplier and/or Discipline drop-down menu and click [Filter](#).

Instructional Narrative

[wireframe = may_16/import_data_progress.htm]

If necessary, fill any missing information into the red cells.

Select the Validate check box for each new product that you wish to validate (or click Select All to validate all of the new products), and then click [Import Validated Products](#).

Importing New Products in the database...

Instructional Narrative

[wireframe = import_data_new_products.htm]

Click [Next](#).

Results of Importing New Products

Instructional Narrative

[wireframe = may_16/import_data_results_newprod.htm]

To filter the list, choose an appropriate option from the Supplier, Discipline, or Type drop-down menu and click [Filter](#).

You can sort the results by clicking [Product Number](#) or [Description](#).

To go on to the next step, click [Continue with Importing Cross-references](#).

Validate Products – 7c

Review New Cross-references Instructional Narrative
[wireframe = may_16/import_data_final.htm]

To filter the list, choose an appropriate option from the Supplier, Discipline, or Type drop-down menu and click Filter.

You can sort the results by clicking Product Number or Description.

Set preferred product status by choosing the appropriate radio button in the Preferred Product column. Set the product type for a product by choosing the appropriate option from the Type drop-down menu for that product and clicking Set. (AE: Actual Equivalent, FE: Functional Equivalent, SE: Similar Equivalent)

You can set the same type designation for all the products by choosing a type designation from the drop-down menu at the top of the Type column and clicking All.

Select the Validate check box for each new product that you wish to validate (or click Select All to validate all of the new products), and then click Import Validated Products.

Select the Remove check box for each new product that you wish to remove (or click Select All to remove all of the new products)

Next, click Import Validated Cross-References.

Importing New Cross-references in the database... Instructional Narrative
[wireframe = may_16/import_data_new_cr.htm]

Click Next.

Results of Importing New Cross-references
[wireframe = may_16/import_data_results.htm]

To filter the list, choose an appropriate option from the Supplier, Discipline, or Type drop-down menu and click Filter.

You can sort the results by clicking Product Number or Description.

Options Control – 8

Instructional Narrative This section contains tools for modifying profiles and tables. It is available only to authorized users. If you want to know more before you begin, click [Help](#).

Select User or Table – 8a

Instructional Narrative To select a user profile to modify, select one of the options in the Profile to change drop-down menu.
To select a table to modify, select one of the options in the Table to change drop-down menu.

Edit User Preferences – 8b

Instructional Narrative Click [Logic Rules](#) to open user options control page. Make desired changes by choosing the appropriate option in the drop-down menu box for each category. Click [Save/Update](#) to save your new settings.

Choose User Type To select a user profile type, select one of the options in the **Profile to change** drop-down menu box.

Instructional Narrative

Edit Table Rules – 8c

Instructional Narrative Click [Schema](#) to open options control page.

Click [Edit](#) to make changes to an existing Type Code. When the Type Code and Description text boxes appear, edit the name or brief description in the appropriate box. Set the status of this revised code by selecting the appropriate option in the Status drop-down menu box. Click [Save](#) to save your work.

Add New Table Rule Click [Schema](#) to open options control page.

Instructional Narrative Click [Add](#) to create a new Type Code. When the empty Type Code and Description text boxes appear, enter the name of the new Type Code and a brief description in the appropriate box. Set the status of this new code by selecting the appropriate option in the Status drop-down menu box. Click [Save](#) to save your work.