

SIGMED Lite

- **Pharmaceutical Supply Chain Management Tool** -

- **Installation Notes** -





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1 Introduction

SIGMED Lite is a computerized drug management information system for Health Facilities and Pharmacies. It encompasses all functions of supply chain management. These include: forecasting and planning, procurement and purchasing, warehousing, inventory management and sales.

SIGMED Lite is not designed to operate in a client-server environment; the database will be located on the computer where you install SIGMED Lite.

This LITE version is derived from SIGMED, the drug management information system for Medical Stores (www.medict.nl).

This document gives an introduction to SIGMED Lite. Chapter 2 explains how to install SIGMED Lite on your computer. In Chapter 3 we explain the how to unlock the demonstration version and how to use SIGMED Lite. In this “Getting Started” chapter we describe how to navigate through the program. Chapter 4 explains the maintenance operations of the system. Before you can use the logistic modules of SIGMED Lite (procurement, receipt, distribution, management information) the system needs to be feed with data of your organization (e.g products, suppliers, patients). This parameterization of SIGMED Lite is described in the chapter “Profiling”.

MedICT can provide support in setting up SIGMED Lite for your organization. Contact us for more details.

When you decide to purchase SIGMED Lite, the demo version will be unlocked after receipt of the payment. This means that you will be able to continue working with your data that you have entered during the trial period.

Payments should be made using the following bank details:

Name: Medict BV
 Account number: 3670.06.316
 Bank: RaboBank, Wageningen, Netherlands
 Swift Code: RABONL2U
 IBAN code: NL07RABO 03670 06 316

Pricing:

| Product | Retail price (in Euro) | Nr of licences | Unit price per licence (in Euro) |
|-------------|------------------------|----------------|----------------------------------|
| | € | | € |
| SIGMED Lite | 1,000 | 1 | 1,000 |
| | Contact us | > 5 | |

All prices are excluded VAT. Note that for customers within EU countries 19 % VAT is added.

For questions about SIGMED Lite, contact:

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Email: info@medict.nl

2 Installing SIGMED LITE

2.1 Recommended System Requirements

The following resources are recommended for use with SIGMED Lite:

| | |
|-------------------|--|
| CPU | Pentium III (or higher) or equivalent |
| Operating system | Windows 98, ME, 2000, NT4 (service pack 6 or later), XP (home / pro edition) |
| Memory | 64 MB |
| Hard drive space | 250 MB |
| Screen resolution | 800x600 pixels |

Minimal computer skills and an understanding of Microsoft Windows and Microsoft Excel are needed. We assume that you are already familiar with Windows terms such as icon, application, window, click, double-click, select, choose and menu. If you are relatively new to Windows, you may wish to review your *Microsoft Windows User's Guide* before you begin.

SIGMED Lite is not designed to operate in a client-server environment; it is a stand-alone program. This LITE version is derived from SIGMED, the drug management information system for Medical Stores. SIGMED is a client-server application (www.medict.nl).

2.2 How to install SIGMED Lite

From CD

To install this release of SIGMED Lite, insert the CD in your CD-ROM drive. The installation of FoCaMed will start automatically. Follow the on-screen instructions (Fig. 2.1 – 2.3).

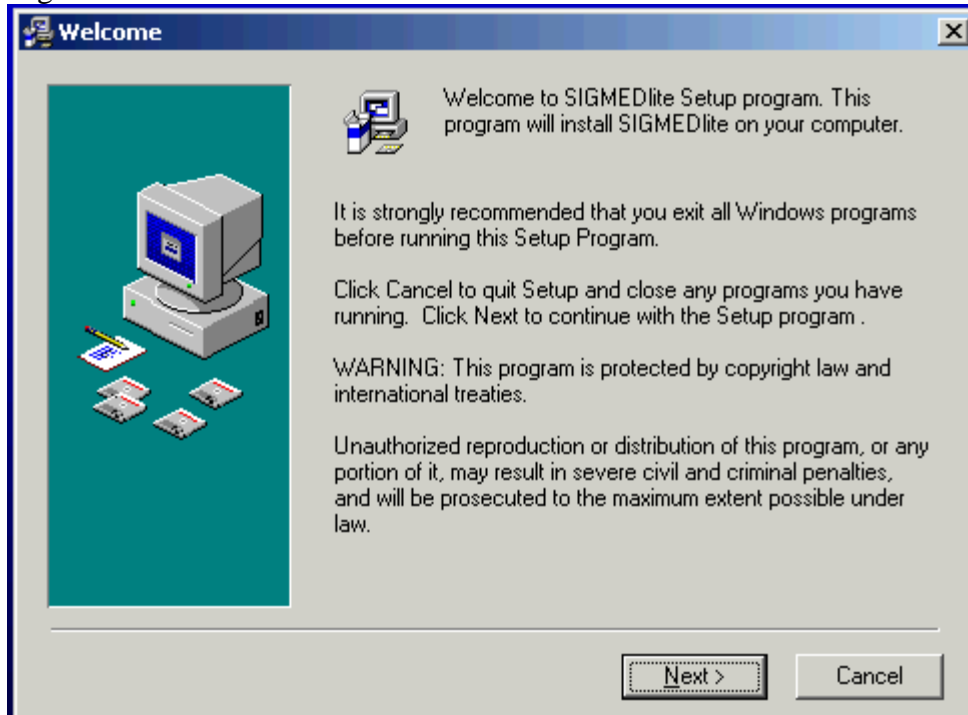
To start the installation manually:

1. Open Explorer and go to the directory of the CD-ROM.
2. Double click the file SIGMEDLite.exe.
3. Follow the instructions (Fig. 2.1 – 2.3).

Downloaded from www.medict.nl

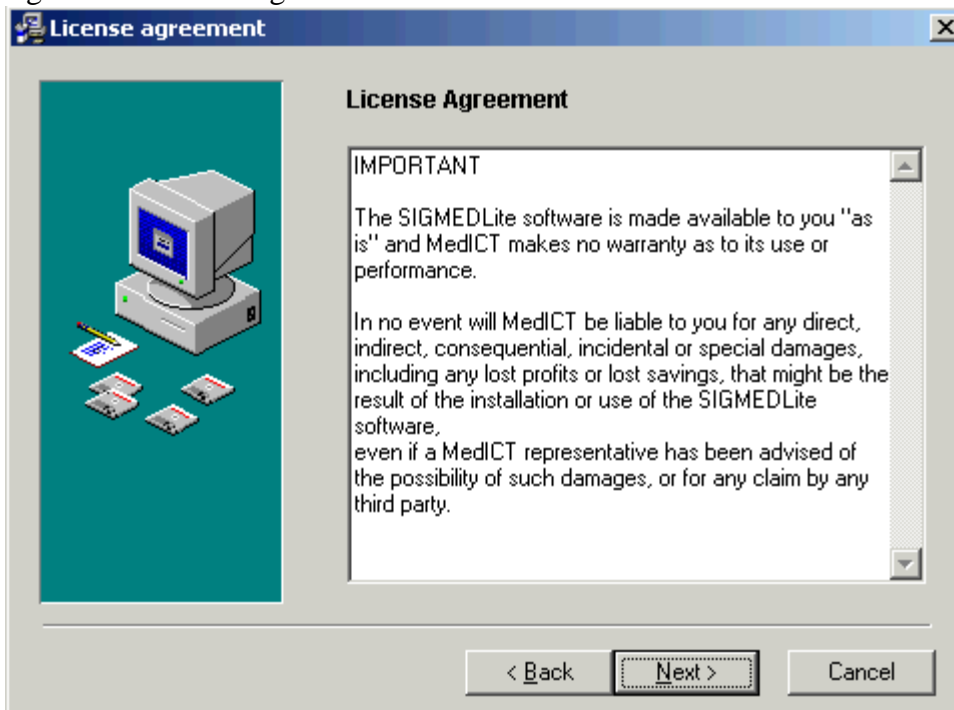
1. Go to the map where you stored the download.
2. Unzip SIGMEDLite.zip
3. Click on SIGMEDLite.exe and follow the on-screen instructions (Fig. 2.1 – 2.3)

Figure 2.1 Welcome screen



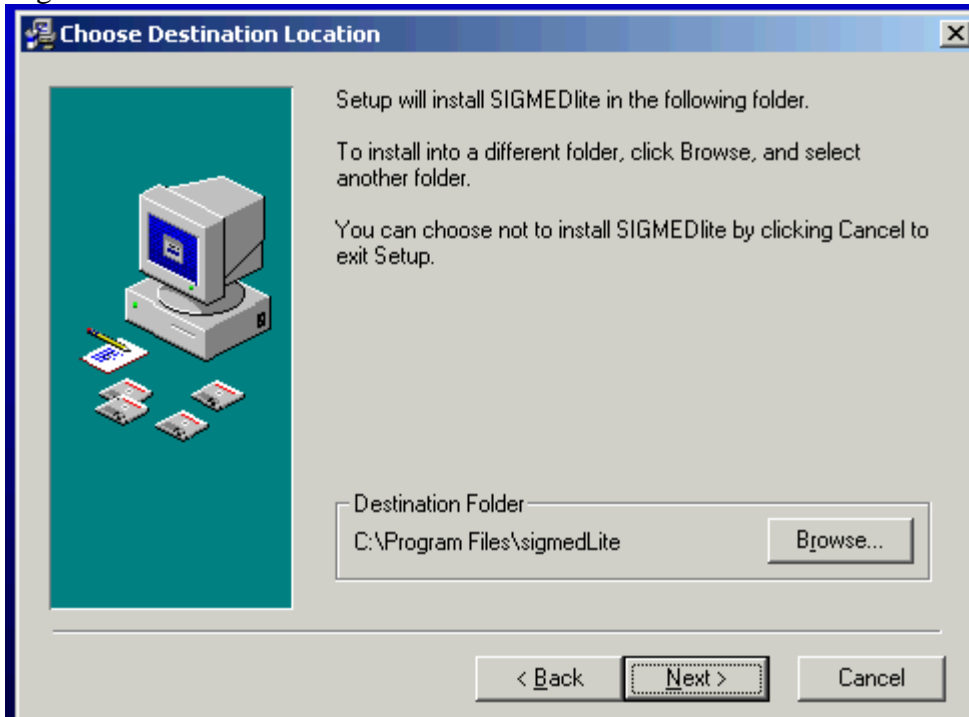
4. Click on **Next** to continue.

Figure 2.2 License Agreement screen



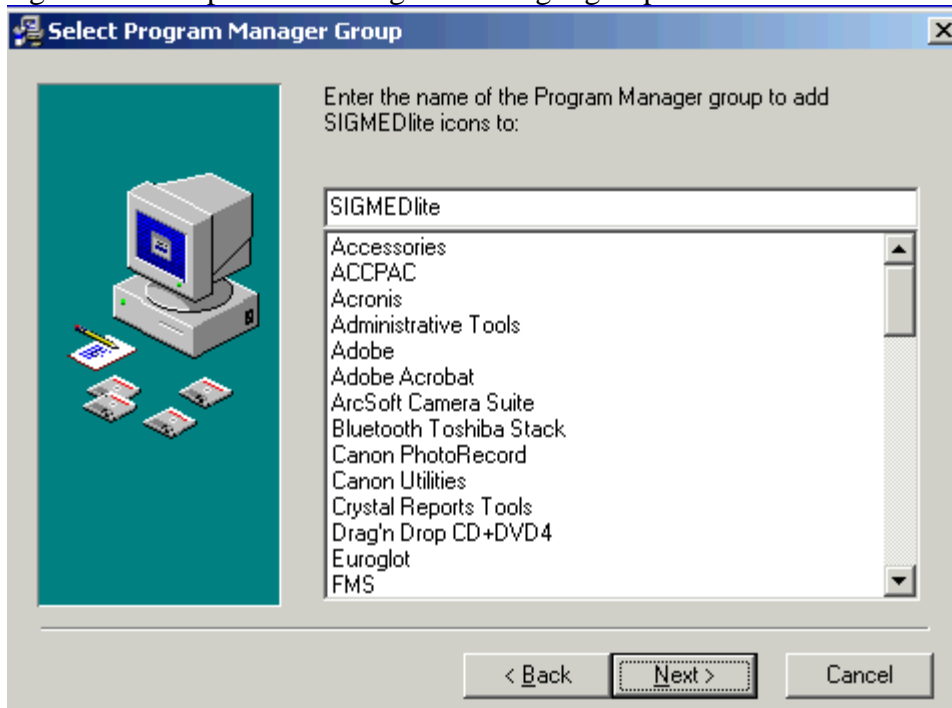
5. If you agree with the License Agreement click on **Next** to continue

Figure 2.3 Destination Folder screen



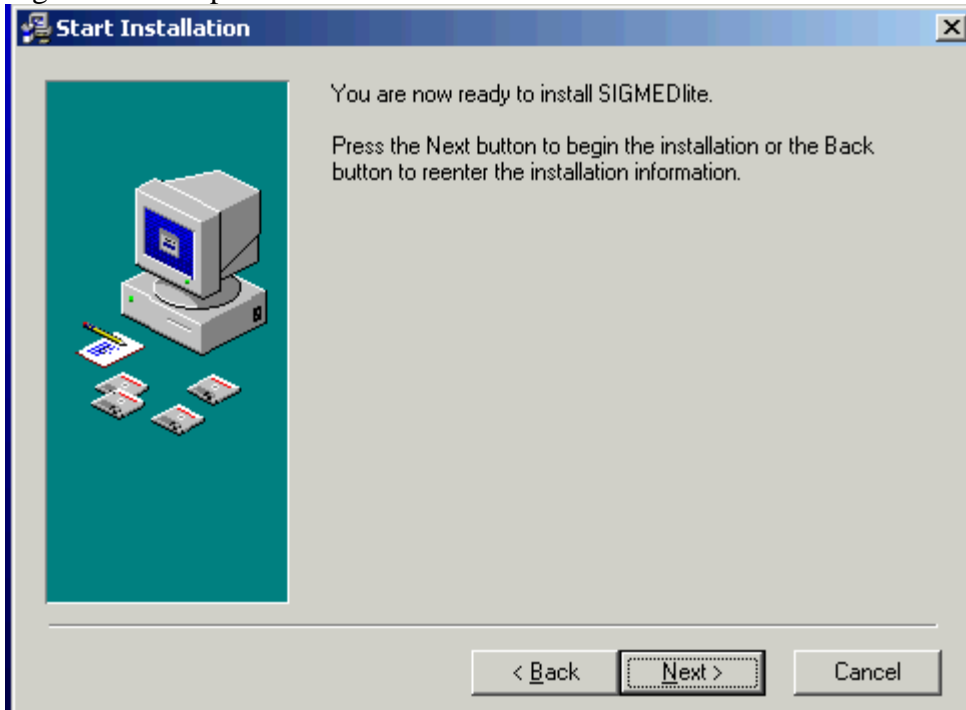
Click on **Next** if you want to install SIGMED Lite in C:\Program Files (=default folder). Click **Browse** if you want to install SIGMED Lite in another folder.

Figure 2.4 Set up screen – Program Manager group



6. Click **Next** to continue.

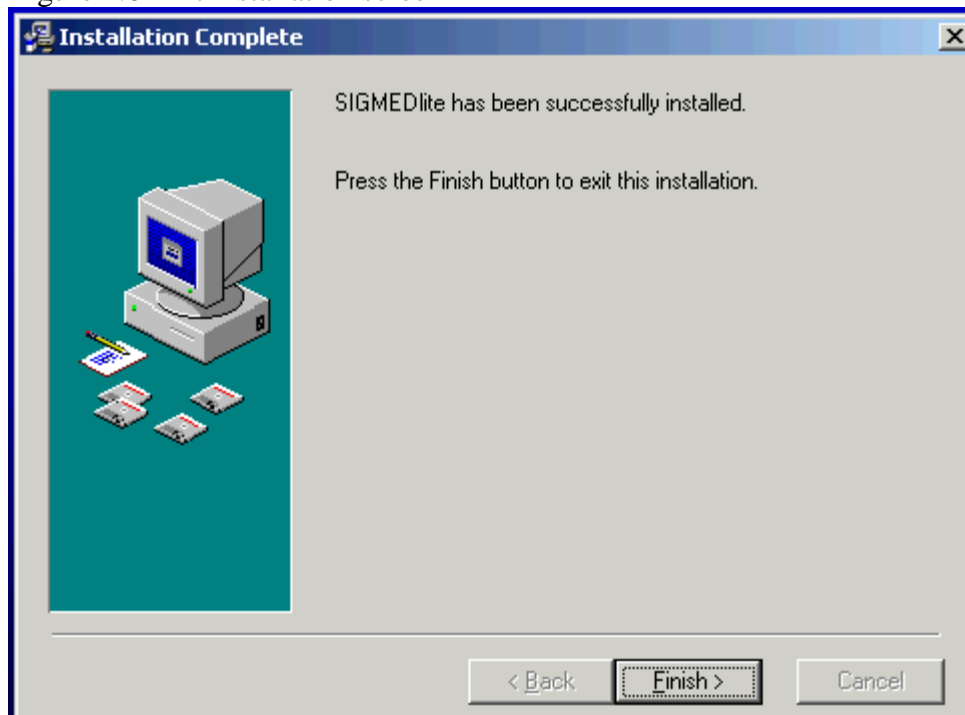
Figure 2.5 Set up screen



7. Click on **Next** to continue.

When the installation is complete the following window is displayed:

Figure 2.6 Exit installation screen



8. Click on **Finish** to close the window

Consult Chapter 3 (Getting Started) and Chapter 5 (Profiling) before using SIGMED Lite.

3 Getting started

This Chapter explains you how to unlock the trial version and how to navigate through SIGMED Lite; what type of information is displayed and how to make database transactions like Create, Update, Delete and Print.

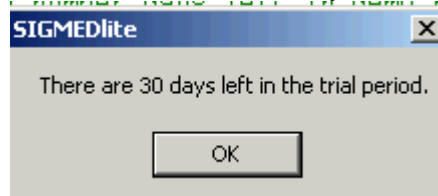
3.1 Unlocking and login

After SIGMED Lite is installed on your computer, you can start the program from the Windows Taskbar:

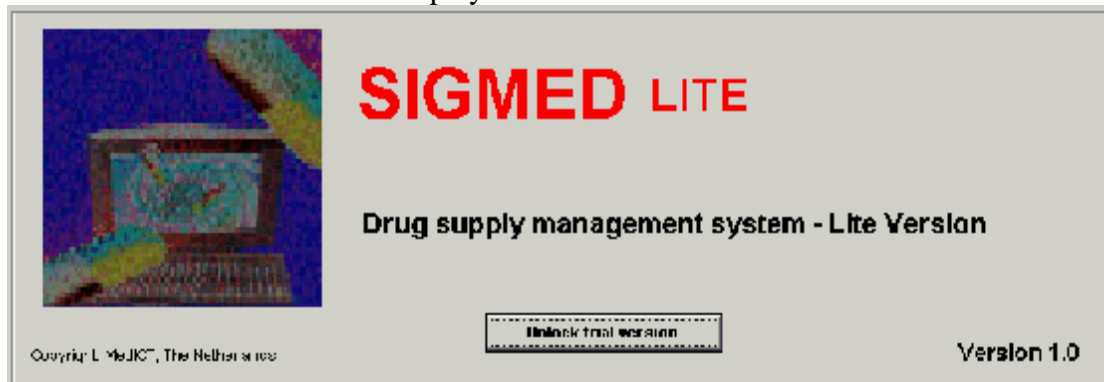
1. Click on **Start**
2. Click on **Programs**
3. Locate and click on **SIGMED Lite**

SIGMED Lite is distributed as free-trial version for a period of 30 days. You experience all the features of SIGMED Lite during this period.

After starting the trial version the number of days left is displayed:

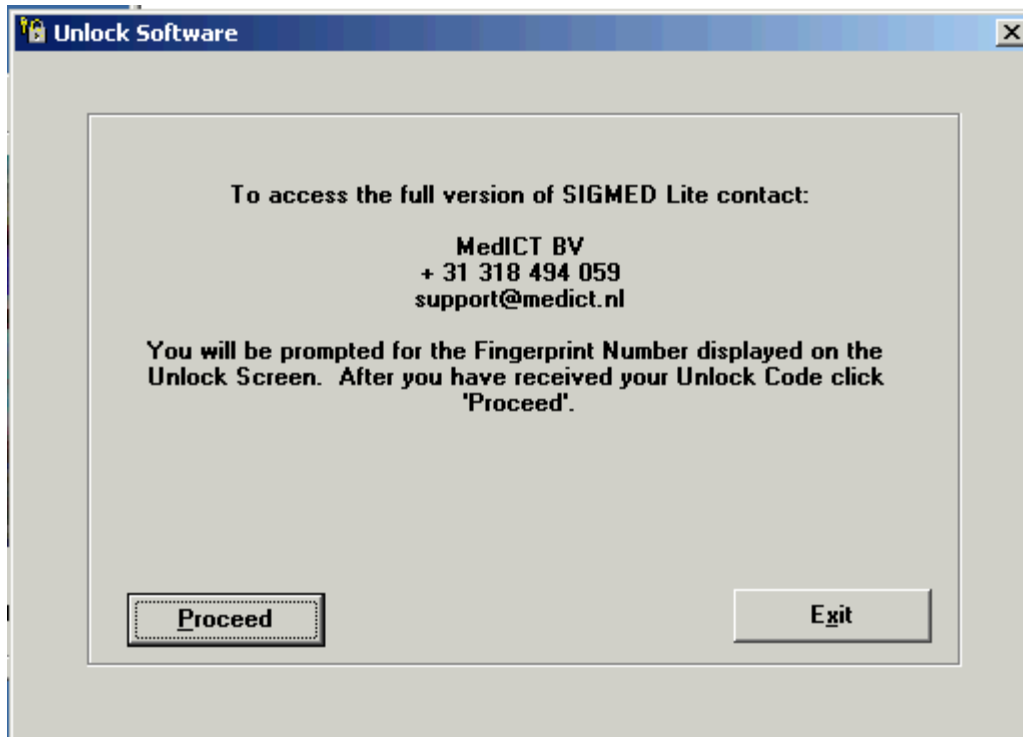


This starts SIGMED Lite and displays the *Welcome* screen:

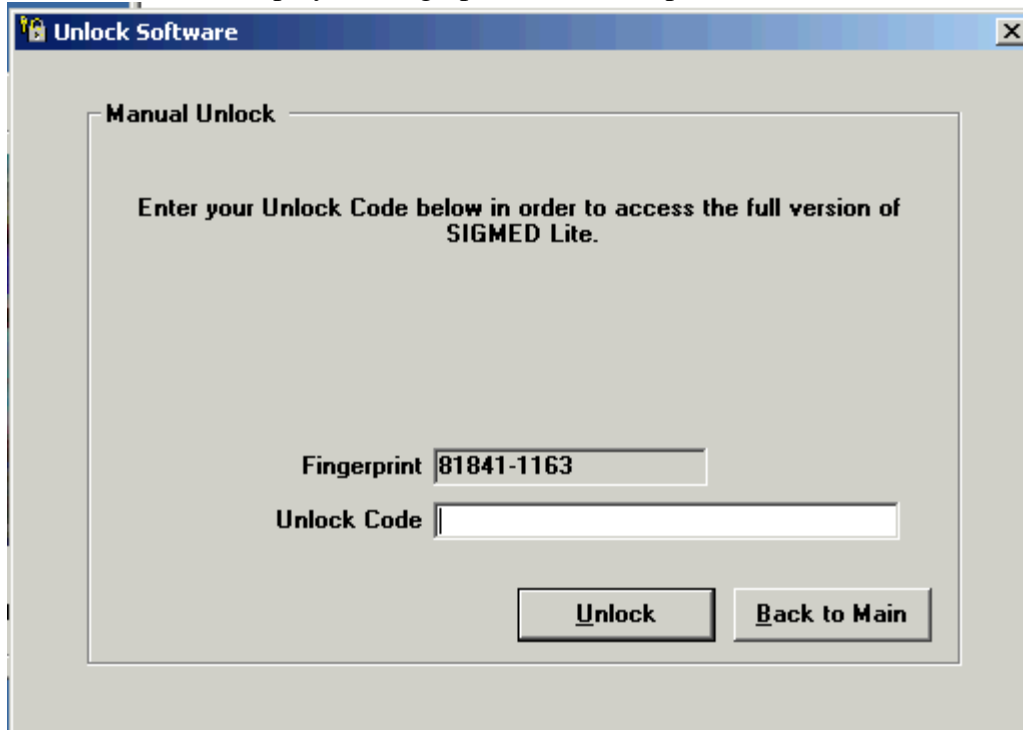


The 30-days free-trial period is lifted by a unlock code. MedICT will issue this code after receipt of the payment. This unlock code is based on the fingerprint of the PC on which SIGMED Lite is installed.

The fingerprint of the computer is found by clicking the **Unlock trial version** button. The following form appears:



Click **Proceed** to display the fingerprint of the computer:



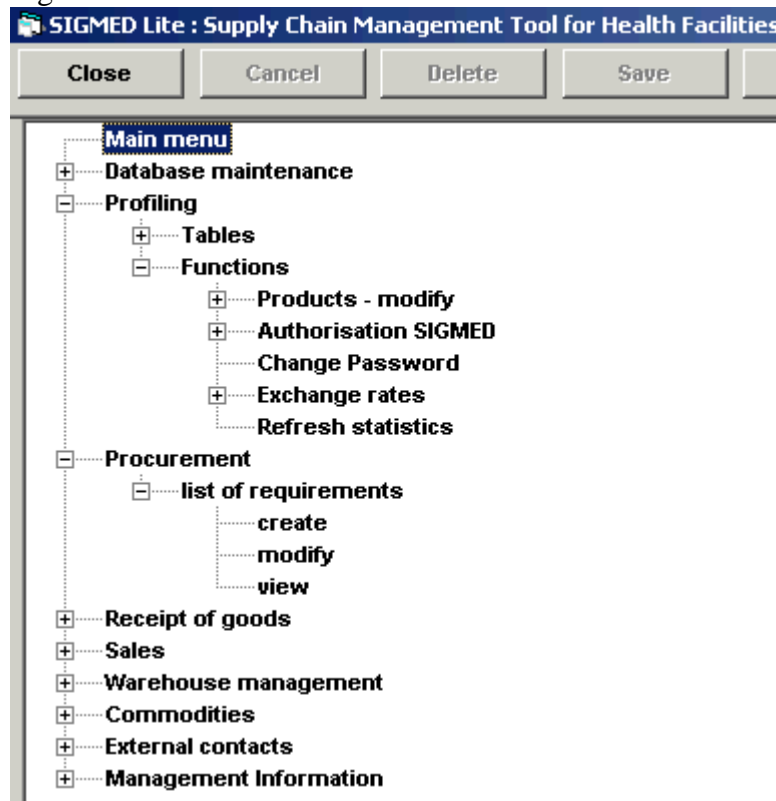
In the above example the fingerprint is 81841-1163. Send this fingerprint to support@medict.nl and after receipt of the payment you will be issued the unlock code. Enter this code in the field <Unlock Code> and click **Unlock**.

Click the *Welcome* screen to display the logon form (Figure 3.1). You can also create a shortcut of the program on the Windows desktop and start SIGMED Lite by double-clicking the icon.

Figure 3.1 Logon form SIGMED Lite

Fill in your username and password and click the <OK> button to open the main menu (Fig. 3.2). The password is displayed with asterisks (*).

Figure 3.2 Main Menu SIGMED Lite



Two types of users are defined in SIGMED Lite: an user with system administration grants (username: **sa**, password: **sa**) and an user with view grants only (username: **sb**, password: **sb**). After installation you can log on to the system as User **sa** or User **sb**. It is recommended to change the username and password of the two predefined users after installation of the software.

Users with system administrator grants can add new users (see Chapter 5.2.2) and are granted to conduct “create”, “modify” and “delete” database transactions.

SIGMED Lite’s menu tree is a quick and easy way to navigate through the program. To use the menu tree:

- Click on the plus (+) sign next to any option to expand another submenu
- Click on the option you need to display its data form.
- Click on the minus (-) sign next to any option to collapse the submenu

Before using the logistic modules of SIGMED Lite define first the base currency and local currency (see chapter 5). Explore the default settings also and make changes if required (e.g. financial year). The table with the default settings is accessible through the menu option <Profiling → Tables → default values>.

3.2 Button bars

Each data form comprises a top menu button bar (Fig. 3.3) and a bottom bar (Fig. 3.4).

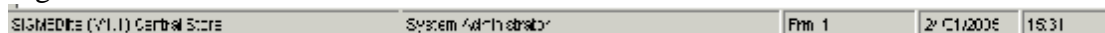
Figure 3.3 Top menu button bar



Buttons are enabled (e.g. Delete) or disabled (e.g. Save). If enabled, the respective transaction can be invoked by a mouse-click.

| Top Button | Description |
|------------|---|
| Close | Closes the active form and/or SIGMED Lite. |
| Cancel | Cancels the changes made. Already saved changes cannot be cancelled anymore. |
| Delete | Deletes data of the active form. |
| Save | Saves data of the active form. After “save” all fields are locked. |
| Update | Changes of the data fields can be made. This action unlocks all relevant fields and enables the existing buttons of the form. |
| Insert | This action makes it possible to enter new data. All relevant fields become empty (blank) and unlocked. |
| Print | Prints a report of the current form, which opens in Crystal Reports viewer |
| Help | Displays the help file |

Figure 3.4 Bottom bar



The following information is displayed:

- Current release of SIGMED Lite (e.g. V1.1)
- The user name: “System Administrator”
- The number of the form (e.g. Frm 1)
- Date and time

The forms are numerated. In case of problems, the number displayed in the bottom button bar will help to trace down the anomaly.

3.3 Forms

The user-interface of SIGMED Lite (screens, windows) constitutes *forms*: data forms, pop-up forms.

In most cases a data form constitutes two parts: **data fields** with detailed information and **data tables** (Fig. 3.5).


Figure 3.5 Data form (see chapter 10.5)

The screenshot displays the SIGMED Lite interface. At the top, a menu bar includes buttons for Close, Cancel, Delete, Save, Update, Insert, Print, and Help. Below this is a list of generic names and dosage forms. The selected item is 'ABX Miniclean - bottle 500 ml'. Below the list, there are input fields for 'Pack size' (set to 'pack'), 'Unit' (set to '1'), 'Currency' (set to 'USD'), and 'Price order pack' (set to '12.500'). The 'Supplier's item code' is 'MFM' and the 'Supplier' is 'Africa Commercial Agency'. At the bottom, a table shows the following data:

| Supplier | Pack size | Order pack size | Pack price |
|--------------------------|-------------|-----------------|------------|
| Africa Commercial Agency | pack 1 unit | 1 unit | USD 12.500 |
| Central Medical Store | pack 1 unit | 1 unit | USD 16.850 |

The data **fields** contain relevant specific information. When saving the form, the fields are re-locked and grey-coloured. By mouse-clicking the top menu button bar buttons “Update” or “Insert” the relevant data fields are unlocked, which is indicated by their white background colour.

In a **data table** all relevant data is summarized. In the example of Figure 3.5 the form comprises two tables. The top data table contains for example all product items while the bottom data table contains detailed information about the selected product item. The function of the form of Figure 3.5 is to update order pack size prices. All pack sizes of *ABX Miniclean – bottle 500 ml* are listed in the bottom data table; the selected pack size data of the active line is shown in the fields *Supplier*, *Order pack size*, *Currency* and *Price order pack*.

Clicking the button  opens a list box from which a selection should be made (Fig 3.6). To use a list box: double-click the item you want to select or single-click the item to deselect.

The content of these list boxes originates in most cases from the base tables.

Figure 3.6 Pull-down menu: list box



The screenshot shows a form with several fields. The 'Currency' field has a dropdown menu open, showing a list of currency codes: EUR, FCFA, MK, and USD. The 'USD' option is currently selected and highlighted in blue. Other fields visible include 'Price order pack', 'Order pack sizes', and 'Product'.

In some cases extra buttons are available on the form. By mouse-clicking the button a new form will be opened.


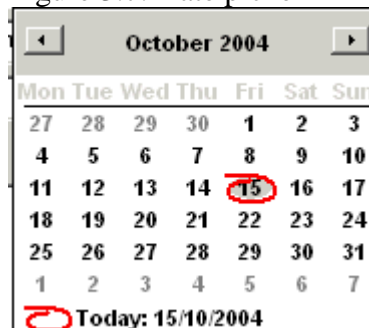


Dates are entered by means of a date picker control (Fig. 3.7), which is opened by clicking the  button of the list box **Date** .

Figure 3.7. Date picker



The screenshot shows a date picker calendar for October 2004. The calendar grid displays days from 1 to 31. The date 15 is circled in red. At the bottom of the calendar, the text 'Today: 15/10/2004' is displayed, also circled in red. Navigation arrows are visible at the top of the calendar.

Navigation through the year is done by clicking the  (backwards) and  (forwards) button. Clicking the date closes the date picker and the selected date is visible in the data field.

The “Search...” button is often present in the forms. A pop-up form opens where the user can fill in the search criteria (Fig 3.8).

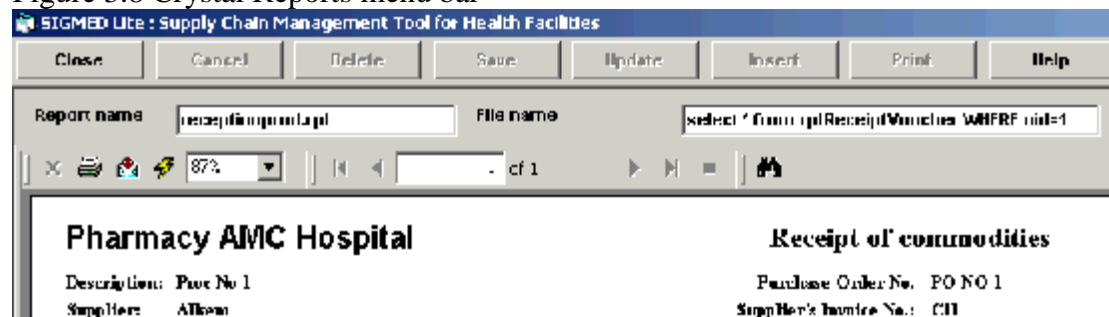
Figure 3.8 Search form “Product Items”

SIGMED Lite applies a full text search where “xxx” is treated like “xxx*”. Search on the product name “Aba” gives all items, which start with “Aba” (e.g. Abacavir - 300 mg - 60 caps, Abacavir - 200 mg - 60 caps). The button Cancel of empties the search string. In this case all records will be listed.







3.4 Crystal Reports

SIGMED Lite uses Crystal Reports as report generator. Reports are invoked by clicking the <Print...> button of the top menu button bar. Reports appear in the preview mode. The report name, and the menu bar are visible (Fig. 3.8).

Figure 3.8 Crystal Reports menu bar



The menu bar offers a lot of functionality. It comprises:

-  = refresh the report
-  = zoom
-  = go to first page
-  = go to previous page
-  = go to next page
-  = go to last page


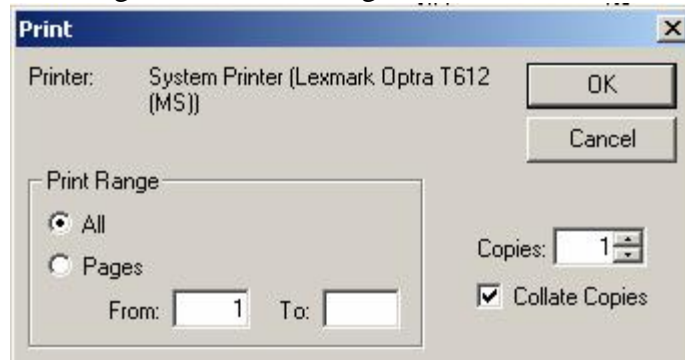

When clicking the  (= print) button the print dialog screen opens (Fig. 3.9).

Figure 3.9 Print dialog screen



The default printer is shown. The user can enter the print range and the number of copies.

The  button is for exporting the report to other file formats like MS Word, MS Excel and pdf.

After clicking the button the export dialog screen appears (Fig. 3.10). In the screen the user should select the desired format. After clicking the **OK** button the export folder dialog screen opens (Fig. 3.11).

Figure 3.10 Export dialog screen

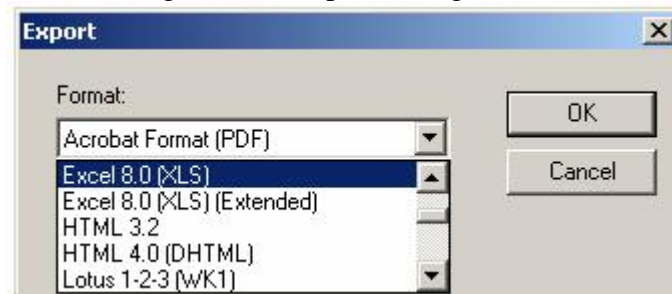
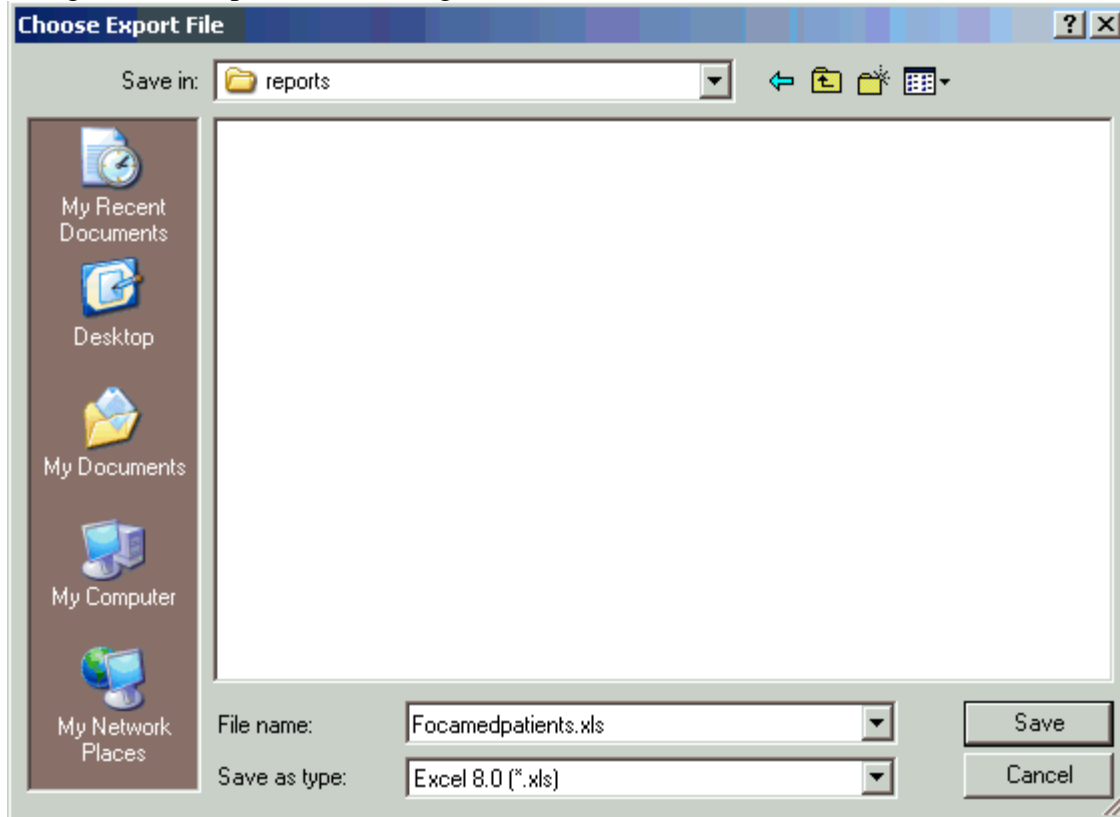


Figure 3.11 Export folder dialog screen



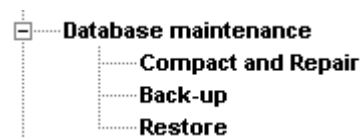
The user is able to select the folder and re-name the report file.

4 Maintenance

SIGMED Lite requires relatively little maintenance. The data is stored in a Microsoft Access database.

Microsoft Access standard “Compact and Repair” en “Back-up” functions are incorporated in SIGMED Lite.

Figure 4.1 Menu option Maintenance



Maintenance of the database is made through the Menu Option **Maintenance - Compact and Repair**. Select this option when performance is slowing down.

Database back-ups should be made at regular intervals. The back-ups are stored in the folder `..\database\backup` of the application map. When the back-up has been created, SIGMED Lite shows the following message:

Figure 4.2. Database Back-Up



The name of the back-up constitutes: *backup*+ creation date + sequence number *.mdb*. In the above screenshot indicates that a backup of SIGMED Lite has been made on the 8th of June 2005.

5 Profiling

Before you can use the logistic modules of SIGMED Lite (procurement, receipt, distribution, management information) the system needs to be feed with data of your organisation (e.g products, suppliers, patients). This parameterization of SIGMED Lite is described in the chapter “Profiling”.

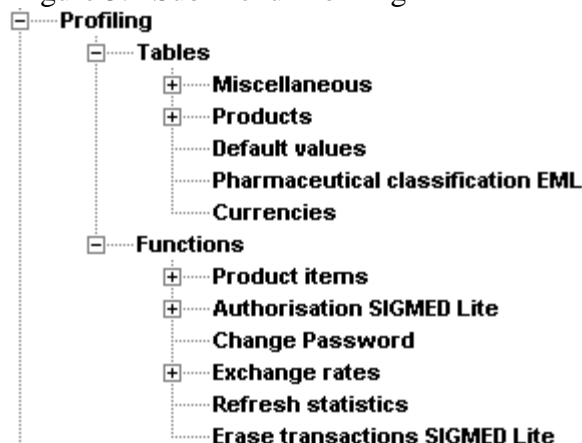
SIGMED Lite is distributed with some base data and a purchase order. Please note that this data is used for demonstration purpose only. They do not reflect a real situation. MedICT can support you in profiling SIGMED Lite.

The demonstration purchase order can be removed through the menu option <Profiling -> Functions -> Erase transactions SIGMED Lite>.

Data entry in SIGMED Lite has been minimized as much as possible by the use of list boxes. These list boxes are populated with data stored in base *tables*. These tables are accessed through the Menu Option <Profiling → Tables> (Fig. 5.1).

Moreover, this menu option also allows you to use *functions* like creating users, changing passwords, updating exchange rates and refreshing the statistics.

Figure 5.1 Sub-menu Profiling



Consult the User manual for more details.

5.1 Tables

SIGMED Lite frequently uses pull down menus, which enables you to select items from a list. These lists are linked to database tables, which are updated via the Menu Option <Profiling - Tables>.

5.1.1 Miscellaneous

Under this submenu the remaining base tables are located. The following entities are involved:

- Countries
- Cities (customers)
- Regions
- Districts
- Reasons boarding off (e.g. Quality control, breakage, expired)
- Procurement: discrepancies receipt (e.g. damaged, missing)
- Type of customer

The mode of data entry, updates and deletes is similar for all entities and will be explained for the entity “Type of customer”.

In SIGMED Lite the customers are classified according to **types** (e.g. NGO, Government). These types of customers should be defined first.

5.1.2 Products

SIGMED Lite applies the following naming conventions for the commodities:

$$\text{Product Item} = \text{generic name (INN)} + \text{formulation} \quad (1)$$

For the formulation three options are available (see Fig 4.8):

Option I: formulation = strength + dosage form + presentation

Option II: formulation = dosage form + strength + presentation

Option III: formulation = strength + presentation

Example I

product name: Acetazolamine
 dosage form: tablet (abbreviation: tab)
 strength: 250 mg (as sulphate)
 presentation: -

Formulation product item:

- Option I Acetazolamine - 250 mg - tab
- Option II Acetazolamine - tab - 250 mg
- Option III Acetazolamine - 250 mg

Example II

product name: Nevirapine
 dosage form: oral suspension (abbreviation: osu)
 strength: 50 mg / 5 ml
 presentation bottle 240 ml

Formulation product item:

- Option I Nevirapine - 50 mg / 5 ml - osu - bottle 240 ml
- Option II Nevirapine - osu - 50 mg / 5 ml - bottle 240 ml
- Option III Nevirapine - 50 mg / 5 ml - bottle 240 ml

A product item could constitute one or more order pack sizes.

An order pack size is defined as:

$$\text{order pack size} = \text{presentation} + \# \text{ units} + \text{form} \quad (2)$$

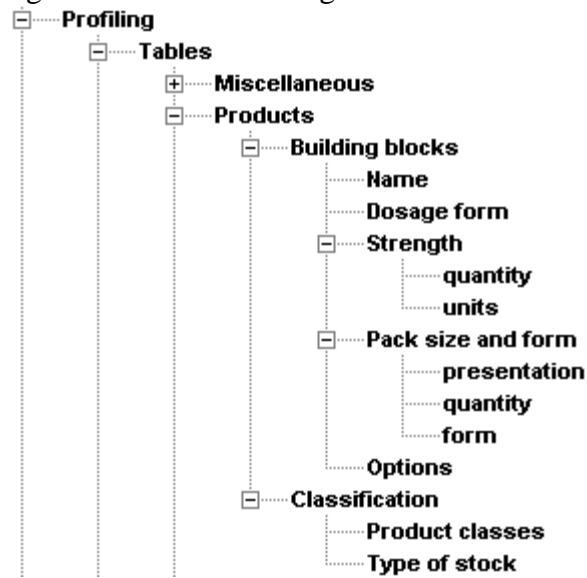
| | | | |
|------|----------------------------|------------------|-------------------|
| e.g. | presentation: | <u>Example I</u> | <u>Example II</u> |
| | # units/presentation unit: | bottle of | pack of |
| | form: | 60 | 24 |
| | | tabs | bottles |

The full descriptions of these examples are:

| Product item | Order pack size |
|--|--------------------|
| abacavir (ABC) – tab - 300 mg (as sulphate) | Bottle of 60 tabs |
| nevirapine – osu – 50 mg / 5ml – bottle 240 ml | Pack of 24 bottles |

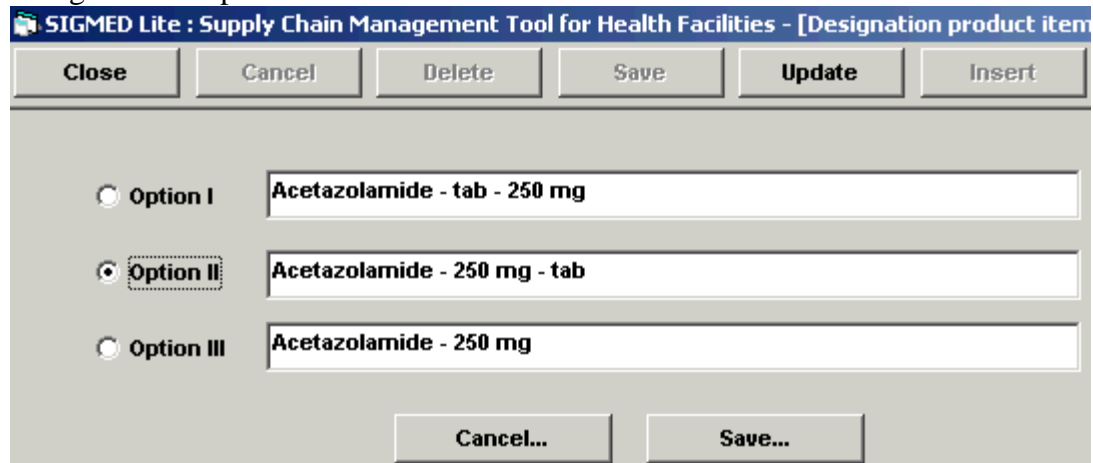
All these building blocks for the commodity and order pack size description are stored in base tables. The Menu Option <Profiling– Tables – Products – Building blocks> provides access to these tables (Fig. 5.2).

Figure 5.2 Menu Profiling – Tables - Products



The product items are created through the menu option <Commodities> (see Chapter 10.2).

The formulation is defined through the menu option <Profiling – Tables –Products – Designation – Options>:



Creating new entries, updating and deleting is similar to the way as described in the previous chapter.

Examples are shown by the next figures.

Figure 5.3 Building block: Product names

| Name (INN) |
|------------------|
| abacavir (ABC) |
| didanosine (ddl) |
| efavirenz (EFZ) |

Names (INN)

Name:

In case of generic medicines it is preferred to enter the International Non-proprietary Name (INN).

Figure 5.4 Building block: Dosage form

| Name | Pack size form | Abbreviation |
|----------------------------|----------------|--------------|
| ampoule | ampoule(s) | amp |
| bottle | | bot |
| capsule | | cap |
| cream | | cre |
| drop | | drp |
| granules | | gra |
| inhalation | | inh |
| injectable | | inj |
| kit | | kit |
| lotion | | lot |
| ointment | | oi |
| oral solution | | ora |
| oral suspension | | osu |
| packet | | pkt |
| peppery | pepperies | pee |
| powder for injection | vial(s) | pti |
| powder for oral solution | vial(s) | pfo |
| powder for oral suspension | vial(s) | pos |

Product Forms

Name:

Pack size form:

Abbreviation:

Note that the “Dosage Form” data screen requires 3 fields: Name, Pack size form and Abbreviation. The latter refers to the name and must be unique.

SIGMED Lite classifies stock into types:

- Catalogue items (normal stock items)
- Global Fund (ARV)
- Vertical Program (e.g. TB, STI)
- Donations

Within each type so-called product item classes can be defined. In the example of Fig 5.4 the classes Tablets and Capsules, Injectables and Vaccines belong to the stock type “Catalogue items”.

Table 5.4 Product item classes

| Product Class | Type of stock |
|---------------------------|-----------------|
| | VP (Y/N) |
| ▶ A. Tablets and Capsules | Catalogue items |
| B. Injectables | Catalogue items |
| C. Vaccines | Catalogue items |

Base Table: Product Class

Product Class:

Type of stock: ...

You can create stock types and product item classes via the menu option <Profiling – Tables – Products – Classification>.

5.1.3 Default values

The menu option <Default Values> comprises important settings, especially for the reports.

The heading and signatures sections of the following reports are stored in this table:

- Receipt voucher report
- Receipt discrepancy report
- Receipt – quality control
- Inventory control report
- Boarding off report
- Sales – invoice
- Sales – credit invoice
- Sales – non availability report
- Picking list

Example <Table Default values>:

| | |
|---------------------------------------|-----------------------------|
| Receipt Voucher: signature I | Pharmacist in Charge |
| Receipt Voucher: signature II | Stores Officer |
| Receipt Voucher: signature III | Clearing Officer |

The heading section of the report constitutes: name, address line1 and address line 2.

Through this menu option the default value for some variables is also set like is shown by Table 5.5

Table 5.5 Default values

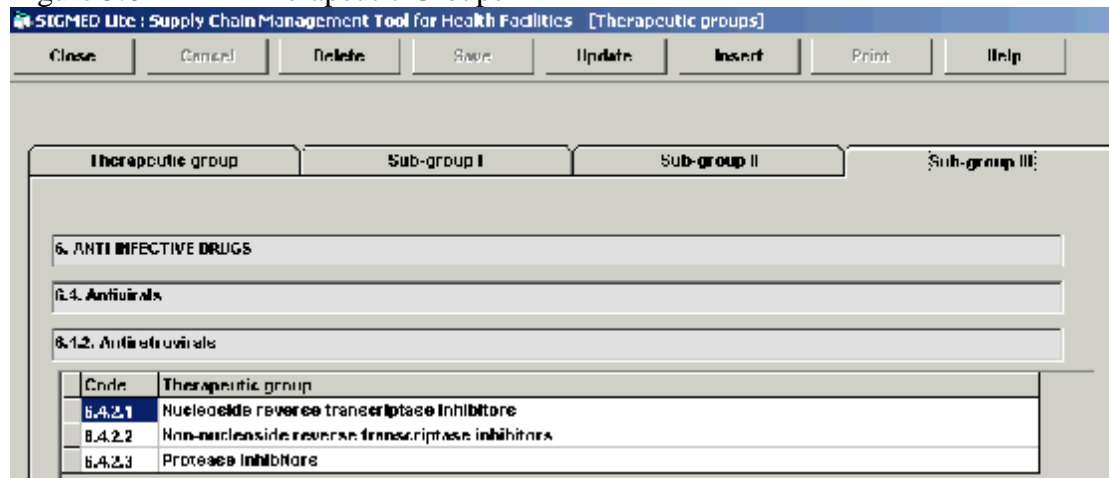
| Description | value |
|------------------------------|-------|
| Lead Time (months) | 7 |
| Stock order level (months) | 12 |
| Estimated Cost % | 10 |
| Minimum shelf life (months) | 6 |
| Financial Year - start month | 7 |
| Handling fee (%) | 10 |
| Surtax (%) | 2.2 |

In the example of Table 5.5 the default value for the starting month of the financial year is set at 7 (July).

5.1.4 Pharmaceutical classification EML

SIGMED Lite follows the therapeutic Chapter classification of WHO’s Model List of Essential Medicines (<http://mednet3.who.int/eml>). Figure 5.6 displays the data screen.

Figure 5.6 EML – Therapeutic Groups



5.1.5 Currencies

Currencies are created through the menu option **Profiling– Tables – Currencies**.

A distinction is being made between a base currency and a local currency as is shown by Figure 5.7. In most cases there will be no difference between those two.

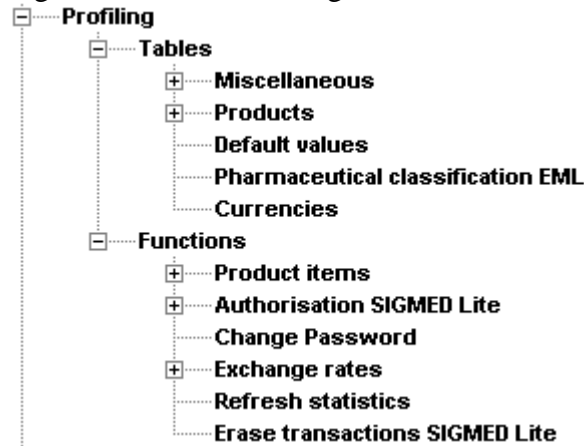
Figure 5.7 Currencies

| | Currency | Base currency | Local currency |
|---|----------|---------------|----------------|
| ▶ | BP | N | N |
| | Euro € | N | N |
| | MK | N | Y |
| | SAR | N | N |
| | USD | Y | N |

5.2 Functions

SIGMED Lite disposes some (maintenance) functions which are located under the menu option <Profiling– Functions> (Fig 5.8)

Figure 5.8 Menu Profiling – Functions



5.2.1 Product items

Normally, you are not allowed to make any changes when the transaction (e.g. receipt) has been consolidated. Exceptions are made for batch number, expiry date and the pricing mechanism of a batch.

Changing a batch number or expiry date is simple: select the batch and fill in the new value:

| Stock code | Product Item | Batch number | Expiry month |
|------------|-----------------------------------|--------------|--------------|
| 1-1-1 | Acetazolamide tab 250 mg | LK232 | 10/2008 |
| 1-2-1 | Chloramphenicol 250 mg - tab | 95-3-L1 | 12/2008 |
| 1-2-2 | Chloramphenicol 250 mg - tab | KL12-3 | 09/2007 |
| 1-3-1 | Chloroform - bottle 500 ml | K154-1 | 05/2007 |
| 1-4-1 | Change batch number / expiry date | | 01/10 |

1-1-1 Acetazolamide - tab - 250 mg

Old batch number

New batch number

During the product item receipt data entry the sales price mechanism of the received batch is registered (chapter 7.2 of the User Manual).

The menu option <Profiling → Functions → Product items> allows you to change the price mechanism after the receipt has been consolidated.

5.2.2 Authorization SIGMED Lite

SIGMED Lite has two standard menus (A and B). Users with menu A are allowed to conduct “create”, “update” and “delete” transactions; this menu gives full access to all functions of SIGMED Lite. Users with Menu B only have “view” grants; they are not allowed to create, modify, change data or to consolidate transactions.

Users with Menu A are authorised to create new users.

5.2.3 Change password

Each user is able to change his password. Figure 5.9 shows the form.

Figure 5.9 User password form

5.2.4 Exchange rates

Description

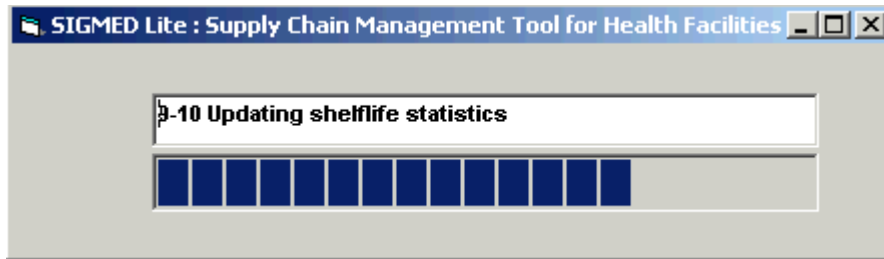
Exchange rates are updated through the menu option **Profiling – Functions – exchange rates**

Figure 5.10 Exchange rates data sheet

| SIGMED V0.00 - [Currencies and exchange rates] | | | | | | | |
|--|------------|------------|---------------|----------|---------------|--------|--------|
| Close | | Cancel | Refresh | Delete | Save | Update | Insert |
| | Start date | End date | base currency | currency | exchange rate | | |
| ▶ | 01.01/2002 | 10.09/2003 | USD | MK | 90.90000 | | |
| | 01.01/2002 | | USD | USD | 1.00000 | | |
| | 11.09/2003 | | USD | MK | 100.40000 | | |

5.2.5 Refresh statistics

Each day the statistics used in the management information module are automatically refreshed by the first user who logs on to SIGMED LITE. The following form is shown:



After consolidation of transactions (e.g. receipts, sales) there might be a need to have the management information already updated and not to wait for the next day. The menu <Profiling → Functions → refresh statistics> allows the user to update the statistics manually.

5.2.6 Erase transactions (purchase orders)

It is possible to erase purchase orders and all logistic transactions (receipt, sales, warehouse management) from the database. It is strongly advised to make a backup of the existing database first. It should be noted that an erased purchase order cannot be restored. In this case you should use the restore function of the Maintenance module.

Two options are available:

Option 1: deletion of all data of the purchase order;

Option 2: deletion of all (consolidated) receipt, sales, warehouse management data.

The second option leaves the List of Requirements intact.