POSITIVE
SOLUTIONS
LIMITED

# Other Analyst Utilities

Version 3.34


June 2006

A reduced version of the complete Analyst manual containing:

Updates
NTX Manager
Archiving
Base Currency Converter

Software by Chris Wilcock

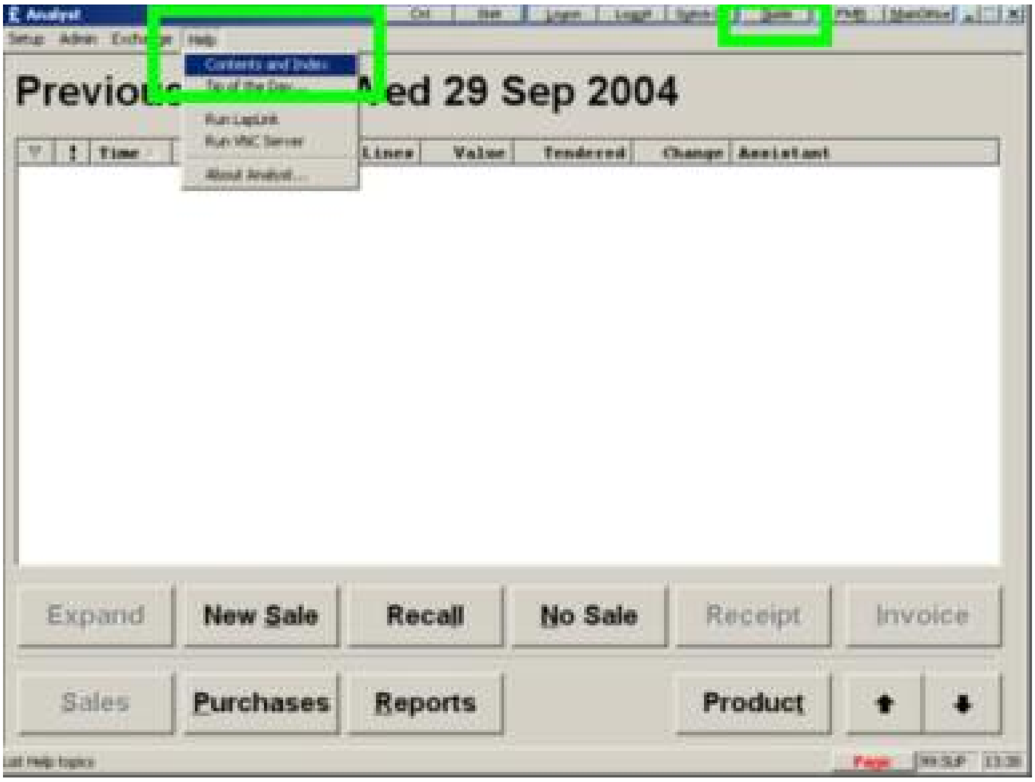
Documentation by Ian Lynch

# Table Of Contents


Introduction ........ 1
Updates ........ 1
  Database Updates ........ 1
    PSL Data Exchange ........ 1
    OTC Database ........ 2
    Drug File Update ........ 3
    Numark Update ........ 4
    Health Food Update ........ 5
    Printing Labels Following Updates ........ 6
    Data Collection Schemes ........ 7
    Product Recommendations ........ 8
  Applying Software Patches ........ 9
NTX File ........ 12
    What is the NTX File? ........ 12
    NTX File Manager ........ 12
    Master Mode ........ 13
    Slave Mode ........ 15
    Restoring an NTX ........ 16
Archive Utility ........ 18
    Time to Archive? ........ 18
    Launching the Archive Utility ........ 18
    Entering the Archive Dates ........ 19
    During the Archive ........ 21
    Backing Up and Reviewing PoS Data ........ 22
    Recalling and Backing Up PMR Data ........ 23
Base Currency Converter ........ 25
    Converting Currencies ........ 25
    Preparing the system in the Republic of Ireland ........ 25
    Printing Dual priced Shelf Edge Labels ........ 28
    The Changeover ........ 29
    Converting the Database ........ 29
    Setting up Analyst ........ 31
Index ........ 33

# Introduction

This is an abridged version of the Analyst on-line help which is accessible by clicking the **Guide** button at the top of the Analyst screen or selecting **Help** from the menu bar then **Contents and Index**.




This modules of this printed help file reflects the on-line help for Analyst Version 3.34 released in June 2006. Sections covered are:

- Updates
- NTX Manager
- Archiving
- Base Currency Converter

Use the on-line help in conjunction with this manual for an up-to-date answer to your questions or call the CareDesk on 01254 833310 if you require more information.

Some of the images used may reflect an older version of Analyst but the procedure will be essentially the same. The on-line help is continually being updated and changes can be found on the What's New and Previous Releases pages of the on-line version.

If you find any errors, omissions or would like to otherwise comment on either this printed manual or the online help email Ian Lynch at ianl@positive-solutions.co.uk

# Updates

## Database Updates

To eliminate the need for you to update all of your prices manually you will receive, as part of your SureCover agreement, regular Database updates. Which updates you receive will depend on your shop type and affiliations to other organisations such as Numark, Londis etc.

The main updates are described in the following pages but tend to be downloaded and applied automatically.

- OTC Database
- Drug File Update
- Numark Update
- Health Food Update

Each of the updates will changes the prices of items as specified in your setup. To check which prices have changed run the Price Changes reports and in particular the Batched Price Changes report from which you can make changes and print product labels.

### PSL Data Exchange

A PSL Data Exchange is the method by which most Analyst users receive database updates and software updates. The updates can be invoked manually by selecting **Exchange** and **PSL Data Exchange** or more usually it is configured to initiate automatically in the Exchange Tab of the system configuration. This allows the system to update when your system and phone line/internet connection are at their quietest.

During the exchange your Analyst system identifies itself to our server and requests any outstanding updates. Our server will determine which databases updates you normally receive and will issue you with the appropriate incremental updates or full updates (whichever is smaller) to bring your system up-to-date. These are automatically applied to the system when the exchange has been completed.

If a new release of the software has been released you will be issued with the patch or patches to update the system. These will only be applied with your consent. See the section on Applying Software Patches.

Also during the exchange you will notice several files, especially if you are a data provider, being transmitted and received. These are requests from our server for data files from your system. All systems are required to send any error logs that may have been generated and system statistics which help us monitor the general health of your system. All statistics are combined to provide nationwide reports for support purposes and are used to monitor trends and avert problems before they become a problem. None of these files contain any sensitive or personal information. Nor is any information shared with any third party unless by your consent as part of a Data Collection Agreement.

Data providers supply their stock, sales and purchasing information as part of a data collection agreement and in return we refund a portion of the SureCover premium . The amount refunded depends on the number of terminals in your system and type of Analyst being used (PoS, PMR or IPS).

We cannot automatically guarantee a place in the data collection scheme due to the requirements of the marketing agencies we collect on behalf of, but If you would like to register your interest to join a scheme should a vacancy in your area become available read the Data Collection Schemes topic and call the Sales department on 01254 833300.

## OTC Database

The OTC database update is a weekly incremental update delivered either directly by modem or over the internet and contains the changes to codes and prices of products in the Chemist & Druggist (C&D). You may also receive a DFU which contains order code and price information from a number of suppliers.

The update is available each week* on Fridays from 16:00 by performing a PSL Data Exchange. The contact details for the Data Exchange are stored on the Exchange Tab of the system configuration.

When the ISU (Incremental Secondary Update) has been downloaded it is opened and automatically applied to your system.

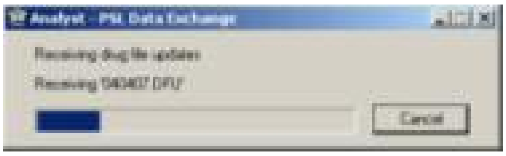
When complete, a summary is displayed.

The update of certain fields can be prevented by selecting the appropriate options on the Updates Tab of the system configuration but new items are added to the system with the information contained within the update.

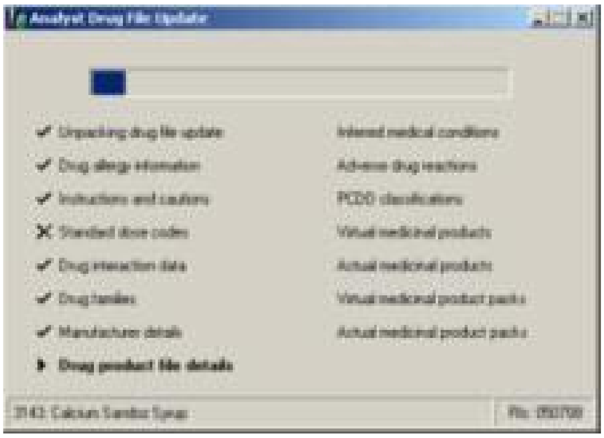
*Bank holidays can affect the weekly schedule of the update and may not even be released during the Christmas period. This depends entirely on the delivery of the update from the C&D to Positive Solutions. The PSL Newsletter should inform you of any change in schedule, or alternatively call the CareDesk.

## Drug File Update

The Drug File Update (DFU) is an incremental update for use with Analyst PMR and IPS which created at Positive Solutions. The update is available each week* on Fridays from 16:00 by performing a PSL Data Exchange. The contact details for the Data Exchange are stored on the Exchange Tab of the system configuration.




Once downloaded the update will check that it is updating in sequence and has not missed any updates. If so it will automatically be applied to the system.




The DFU contains code and price information (where available) from:

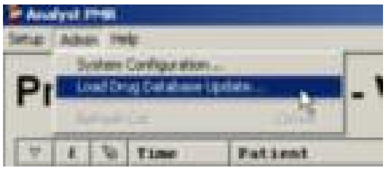
- Mawdsleys
- Doncaster Pharmaceuticals
- Phoenix
- Unichem
- AAH
- Waymade (Order codes only)

Al codes and prices are extracted from the update and placed on the Buying Tab of the product editor. The Cost field on the Details tab can be kept up-to-date with a supplier's prices by shuffling the order around in the price source sections of the Updates tab the System Configuration. The update of certain fields can also be prevented by selecting the appropriate options on the same tab in the system configuration but new items are added to the system with all the information contained within the update.

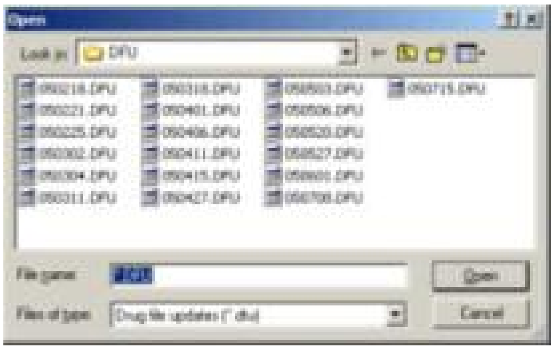
Each of the above suppliers must be setup on your system (see Supplier Setup) and must have the PSL Source field set to extract their information from the update.

#### Manually Applying a DFU

If a DFU has been downloaded but for whatever reason has not been applied it can be applied manually. From the file menu in Analyst PMR select **Admin** and then whilst clicking **Load Drug Database Update** press and hold the CTRL button.



This displays a window which contains all of the database updates you have received. The file names are the dates of release (usually Fridays) backwards (YYMMDD.DFU). Select the one to be applied and click **OK**.

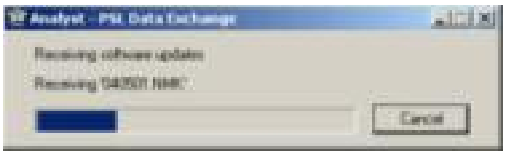


**Caution:** Do not apply old DFUs unless specifically asked to by the CareDesk. Applying DFUs changes cost, retail and drug tariff prices in addition to interaction triggers, cautions, warnings, indications, etc.

*Bank holidays can affect the weekly schedule of the update and may not even be released during the Christmas period. This depends entirely on the delivery of the data from our various sources. The PSL Newsletter should inform you of any change in schedule, or alternatively call the CareDesk.

## Numark Update

Numark members can receive a monthly update of prices and promotions. The update is delivered directly from Numark to our Data Exchange server roughly two weeks in before the price changes should become effective.



Once downloaded the update is stored on the system and will only be applied on the day the price changes are to become active. The changes the update will make to the system can be viewed by running the Impending Price Change report.
Price Updates
The prices of items will be maintained for those items which have a price source set to a supplier who in turn has a PSL Source set to Numark. All of the prices can be changed by the import by selecting the **Force Prices** option in the system configuration. Any changes which might occur however can be viewed in the Numark reports and you can choose to 'Opt Out' of certain changes in a line-by-line basis.
Supplier Update
The products in the Numark update can be set to be ordered from your preferred Numark supplier in the system configuration by using the **Force Supplier** option.
New Products
Products can be created by selecting the **Create New Products** option on the system configuration but at this time the file supplied by Numark does not contain all the

information required by Analyst to enter a complete product record. If this option is selected we recommend vigilant use of the New Products report to locate items created by the import do they can be manually completed.
Applying the Update
When Analyst is started on the morning the prices changes are effective the Daily Initialisation of the system processes the update file and applies the changes as configured. This can take up to an hour as the Daily Initialisation runs slowly in the background to minimise disruption to the general operation of the system. Systems which are left on overnight will have no problems, but systems which are switched on manually each morning will require some time before all changes have been applied.

## Health Food Update

The health food sector is not quite as coordinated and as up-to-date with electronic files and updates as some of the pharmaceutical wholesalers. That said we maintain a database of health food items where we can and release updates on a monthly basis on the 1st of the month, or the next working day after that (except January where the update will be released in the second week). As this release might not fall on the day of the week for your normal PSL Data Exchange a Task Reminder can be used to invoke a data exchange on the first of the month.

The current list of suppliers/wholesalers who provide data to us are:

- Suma
- Tree of Life
- Goodness Foods
- The Health Store
- Solgar
- Health & Diet

And for each of item the following data will be included:

- Full Description
- Till Description
- Department
- Manufacturer
- Retail barcode
- Order code (for each supplier who offers it)
- Recommended Retail Price
- Case size
- Cost Price (for each supplier who offers it)

We are continually in contact with suppliers and working with them to provide more items in the database.

Some suppliers simply don't update their files often enough to be of use in a centralised database though so we have provided 'import filters' to make use of the data disks which they provide from time-to-time. We already have import filters for:

- Brewhurst
- Nature's Store

More filters can be created but the supplier must provide the data in fairly standardised format in order for Analyst to be able to use it. The data must be in a single file and in CSV format. Apart from the column headers at the top of the file there must be no breaks, section headings or changes in format throughout the file. Once we have agreed to write the import filter which might take a number of weeks, the supplier must always provide the data to you in the format we have agreed to work with. A change in format will cause an import filter to fail, or worse still, import corrupt data into the Analyst database.

## Printing Labels Following Updates

The updates which are applied to your system will change the cost and retail prices of your items if you have configured them to do so. Following an update you should check which prices have changed and update your shelf edge labels as soon as possible. This can be done either by using the Batched Price Changes report which will display all changes affected by a particular database update or the "Changes on or Since; Retail Changes" which will display all retail prices changed on or since a specified date. This will include all updates, price overs and any other changes made to the retail price.

As both reports differ in formats the method to print labels differs slightly. The Batched Price Changes report will require lines to be Multi-Selected whilst the Changes on or Since report will use the Tagging method. The procedure for printing labels is identical.
Automatic Printing of Labels
Certain updates can be configured to have the price change labels automatically printed after the update has been applied. The option to activate this feature is in the Options Tab of the system configuration. The price behaviour is also controlled from these options. The option to "Automatically print labels after batch price updates" can only be selected on one terminal which should be the one with the printer attached. Attempting to select this option on a second terminal will de-select the option on the first, effectively changing which terminal will print the labels.

Analyst must be left running on the terminal designated to print the labels when the update is being applied although it need not be the terminal which applied the update. The printer must also be left in a ready state with sufficient paper/labels in the tray to complete the job. Before the first update is applied the label configuration must be set to confirm the style of label to be printed. Press the No Sale button and select **Automated Label Configuration** to set your preferred style.

In order to comply with pricing regulations there are a number of options in the system configuration relating to the prices and confirmation of the labels. If the "Seek confirmation that labels have been printed and deployed". If this option is selected, each time a New Sale is started the assistant will be prompted to confirm whether the labels have been deployed or not.

If they have not the prices behave according to the option selected in the system configuration.

- Always sell at the new price, whether or not the labels have been deployed.
- Always sell at the old price if the labels haven't been deployed.
- Sell at the lowest of the new or old price if the labels haven't been deployed.

If the Labels have been confirmed as not yet deployed and the second or third option is selected when an affected line is sold the assistant is warned that the price should have changed, but the old price is still being charged.

Reprinting Labels

In the event of a printer problem the labels which should have been printed automatically can be re-printed either by clicking the **Reprint** button on the deployment confirmation pop-up or by clicking **No Sale** and selecting the **Automated Labels Reprint**.

## Data Collection Schemes

Positive Solutions offer a number of schemes where we collect usage information from your system on behalf of market research agencies. The scheme you enrol into determines the type of data we require from you and amount of remuneration we give you in return.

We can offer, subject to availability of room, the opportunity to enrol in the following schemes:

- OTC Sales
- PMR Dispensing
- OTC Product Recommendations

In order to qualify for enrolment and payment for data you must perform a PSL Data Exchange each week between 16:00hrs on Friday and 12:30hrs Monday. If the Data Exchange is automated you must ensure its success by leaving the system in a 'ready' state and leave it connected to a phone line which it can dial out on. We advice that Fax machines and EFTPoS terminals (PDQ, Steamline etc.) are not connect to the same line.

You must also use the system to sell/dispense, place orders and maintain the stock levels of the shop. Failure to do this will result in 'poor quality' data which will be rejected by our system and reduce your quarterly payments. Persistent provision of poor data or failure to provide any data at all will result in your removal from the scheme. If you encounter any problems sending the data over the weekend call the CareDesk on Monday who will endeavor to remedy the problem.

If you would like to be included in any of the data collection schemes that we offer call the sales team on 01254 833300 to check for the availability of any spaces.

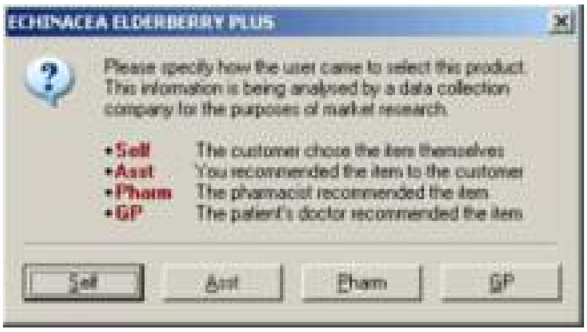
All data provided to Positive Solutions under these schemes is anonymised and kept confidential. A robust data encryption system is employed wherever the transmission of data is involved.

## Product Recommendations

One of the Data Collection Schemes requires user input to determine how a customer decided to purchase a particular product.

When you agree to participate in this scheme 'P Items' and some department ranges will be monitored in addition to any specific products which will be sent in a list to the system each week from us as part of your data exchange. The selection of the department(s) to be monitored is setup in the Miscellaneous Tab of the system configuration.

When a 'P Item', an item on the system's list or in a monitored department is scanned during a sale a pop-up window will appear to ask the assistant how the customer chose this item.




| | |
|---|---|
| Self | Did the customer select the item themselves without any suggestions from their GP or any pharmacy staff? |
| Asst | Did you (the assistant selling the item) recommend the item to them? |
| Pharm | Did the Pharmacist recommend the item to them? (If you are both the assistant selling the item and the Pharmacist use the this option) |
| GP | Did the customer's GP recommend this item to them? |

Ask the customer if necessary and press the appropriate button. The box will immediately disappear and will allow you to continue selling.

Using the Alerts Tab of the system configuration the till can be configured to play a sound or say a phrase when this pop-up box appears. Select the Recommendation Query option in the Sales section.

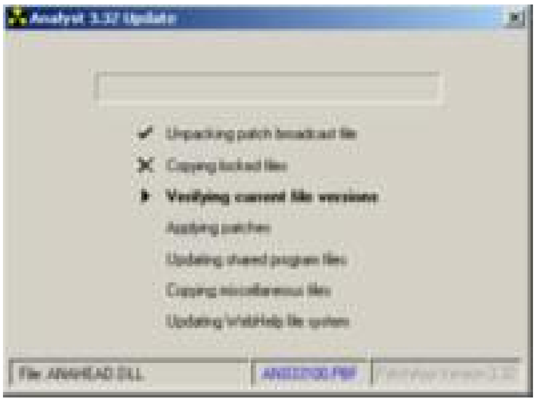
## Applying Software Patches

Analyst software patches are files which update Analyst to the latest version. Analyst is under constant development to develop new features which enhance the usability and keep users on the right side of the ever-changing industry regulations. Each week when your system performs a PSL Data Exchange it checks if any patches are available. If there are they are downloaded to your system ready to be applied. For your convenience updates to Analyst PoS, Analyst PMR, Analyst Main Office, Analyst Event Monitor and the Product Modeller are all contained within the one patch file you will download. This minimises the number of updates received each year. Typically there is a new update every 3 months though changes in regulations or urgent fixes may require an occasional release which do not follow that pattern.

The patch process can take between 2 and 20 minutes depending on the number of changes to be made the number of terminals in your shop and the size of your database. The patch is usually applied simultaneously on all terminals in the system which means that **none of the terminals can be used whilst applying the patch** so plan accordingly.

Each Analyst terminal checks for downloaded patches when it launches or when the Supervisor is logged on. If there is one to be applied the above message appears. If it is not convenient click **No**. Analyst can be used as normal. Log on as Supervisor to display the prompt again. When it is convenient, click **Yes**.

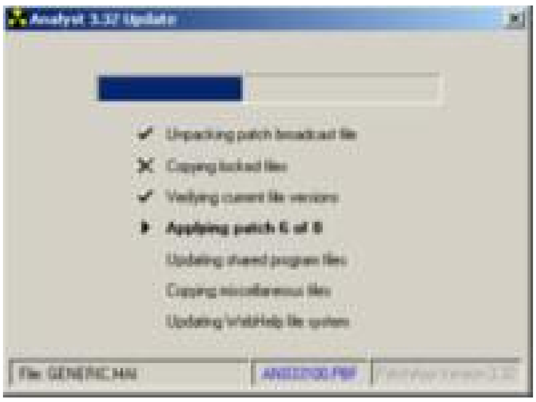

The patch file is unpacked to check it is intact and the information screen is displayed. When you have read and understood the message click either **Exit Update** to return to Analyst (old version) until a better time. Otherwise click **Continue**.



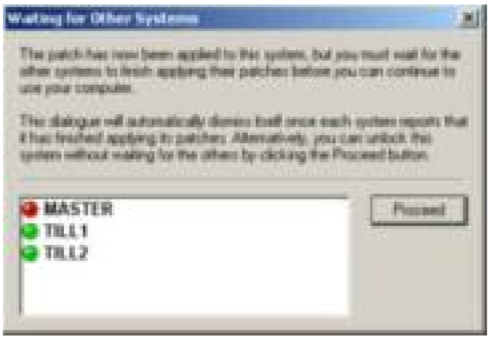
The update will start to apply and the terminal cannot be used until the update is complete.


If you have more than one terminal in the system and the patch is making changes to database or the way it is accessed, all the terminals must patch simultaneously. This 'traffic lights' screen coordinates this procedure. The terminals ready to proceed are marked with a green light and those which are not are marked with a red light. The patch will only apply when all terminals are green. When this screen appears on the first terminal move onto the next machine and repeat the above steps. When that terminal reaches the traffic lights move onto the next, and so on. When the last terminal confirms to the rest that it is ready all machines apply the patch at the same time.

In the unlikely event that there is a problem call the CareDesk. They may require you to read the 12 digit code to them to issue you with a password. Type the number in the field on the right and click on the **Proceed** button when illuminated.



Within one patch file that is downloaded there may be many individual updates to perform. They are applied one after the other on each terminal.




When all of the updates have been applied the database might need to be converted into a new version. In this case the master machine will update the database whilst the slave terminals wait at another set of traffic lights for the conversion to be complete.

Analyst will automatically re-launch on all terminals when complete and can be used as normal. The master will also perform a PSL Data Exchange to report the update to the server at Positive Solutions and check for any more updates.

What has changed? Why the update? Be sure to read the What's New? topic of the help file. This handy page explains what was contained in the update and links to the accompanying documentation to help you get the most out of the new and updated features.

# NTX File

## What is the NTX File?

The Network Transmission File (NTX) is the safety net for the Analyst system. Analyst has been designed to operate over a Windows network in order offer a centralised database and real-time updates between terminals. It was recognised therefore that if the network were to fail, for whatever reason, Analyst would not work on slave terminals. The NTX file provides each terminal with a database to fallback on in the event of a network or server failure.

The NTX file is built and distributed each day either at startup or preferably overnight at the time specified on the Network Tab of the system configuration.

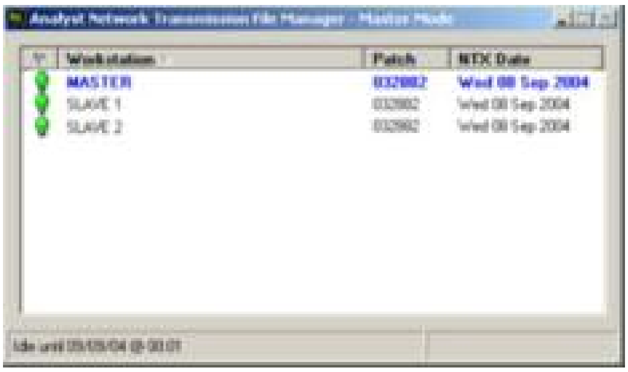
The NTX File Manager launches at the startup of every terminal running Analyst and operates in the background to keep the NTX files up-to-date. The manager can be displayed by double clicking the file compression icon in the bottom right of the screen next to the time.

When displayed, the NTX Manager will always be at the front.

## NTX File Manager

The NTX File Manager is responsible for building, distributing and unpacking the NTX files around the system. Each terminal runs its own manager to perform the duties locally.

Each of the terminals on the system are listed in the NTX Manager with a status bulb next to them, the system patch level and the date of the latest NTX on that terminal.




The terminal listed in blue is the one you are working on. The terminal listed in bold is the master, if there is a bold blue terminal, as above, then you are looking at the master.

The bulbs to the left of the terminal name indicate the status of the NTX Manager on that terminal.

| | | |
|---|---|---|
| | Green | The terminal's NTX is up-to-date and functioning normally |
| | Red | The terminal's NTX is out-of-date. The master should be in the process of sending one down. If not, reboot the terminal and call the CareDesk if the bulb does not turn green a few minutes after restarting. |
| | Out | The NTX Manager on that terminal is not running or cannot be contacted. Reboot that terminal and call the CareDesk if the bulb does not illuminate when restarted. |

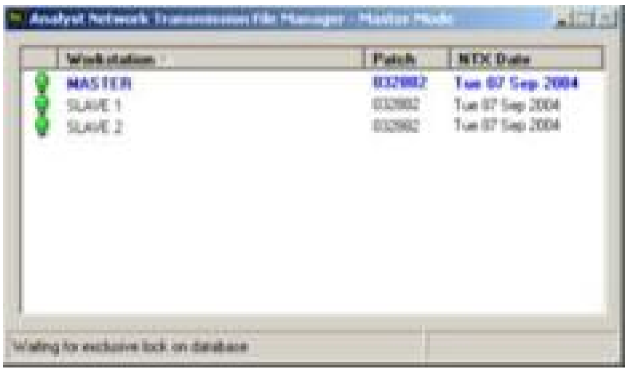
The status bar at the bottom of the window displays any current activity whilst the progress bar next to it displays how much of the NTX file has been built/distributed/unpacked.

There are two modes the manager in: Master Mode and Slave Mode depending on the nature of the terminal. The mode is displayed in the title bar of the window.

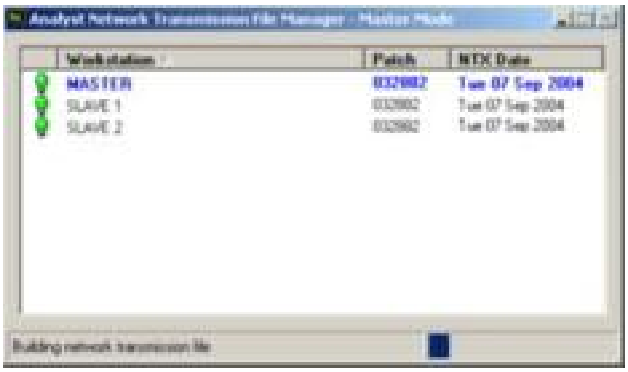
## Master Mode

The NTX File Manager which runs on the master terminal will adopt the Master Mode. This builds and distributes the NTX files and dictates to the rest of the NTX managers in the system when to close and re-open Analyst to allow the build.

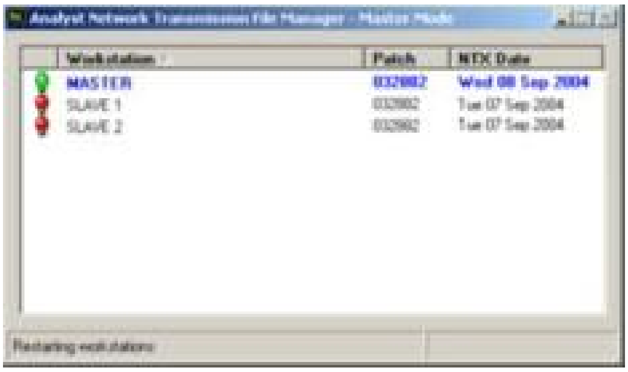
When the scheduled time arrives or at the next startup after that time has passed the NTX manager will start the sequence outlined below.



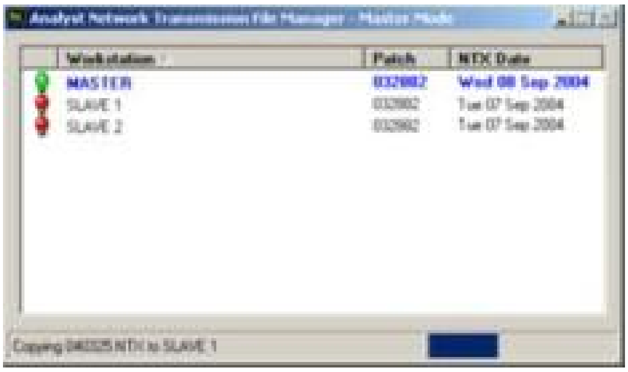

**Waiting for exclusive lock on database**
Analyst will be closed and the signal has been sent to the slave terminals to close Analyst to allow the NTX to build. The assistants have the option to delay the build for 20 seconds if they are in the middle of something. Terminals no already running Analyst will be prevented from doing so.



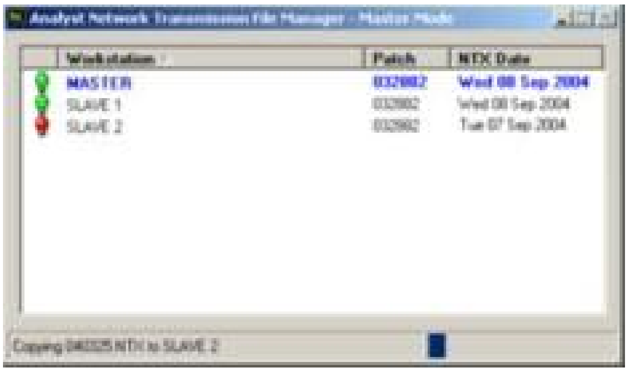

**Building the NTX File**
Once all terminals have closed Analyst the NTX can build. The progress bar indicates how long this might take.



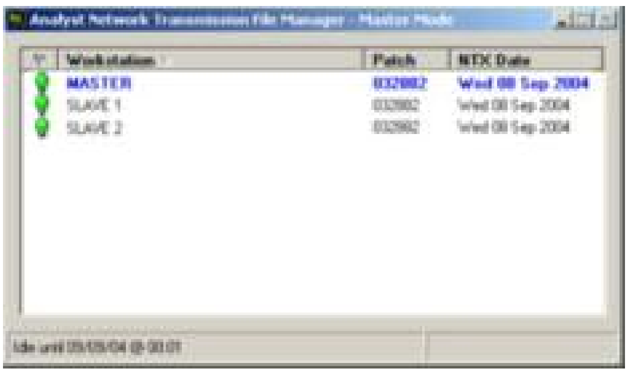
**Restarting Workstations**
Once the file has been built, Analyst will re-launch on terminals which were running it previously. Analyst can now be opened on other the terminals. Note how the slave terminals are now deemed out-of-date with the red bulbs.



**Copying to Slave 1**
The master NTX Manager now starts to send the new NTX file to them.



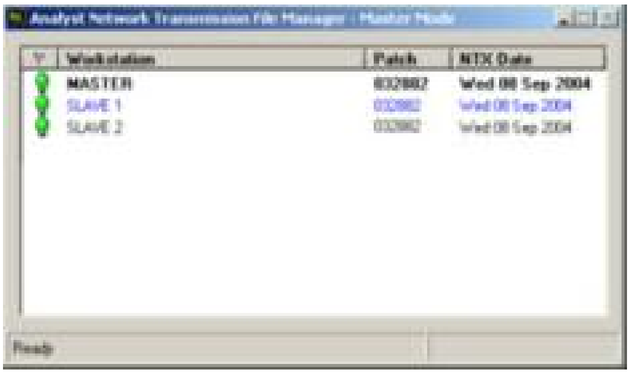
**Copying to Slave 2**
Each terminal in turn is sent the new NTX file.



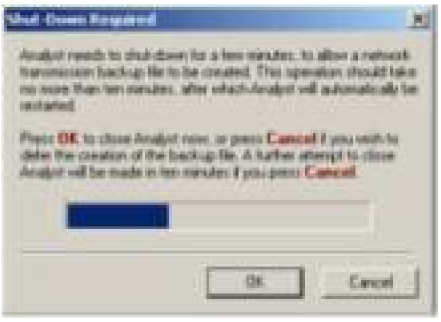
**Job Done!**
When complete all lights show green and today's date is displayed. The NTX manager remains idle until next scheduled.

## Slave Mode

The NTX File Managers which run on slave terminals will adopt the Slave Mode. These receive and inflate the NTX files and control on their own terminal at the command of the master NTX manager when to close and re-open Analyst to allow the build.

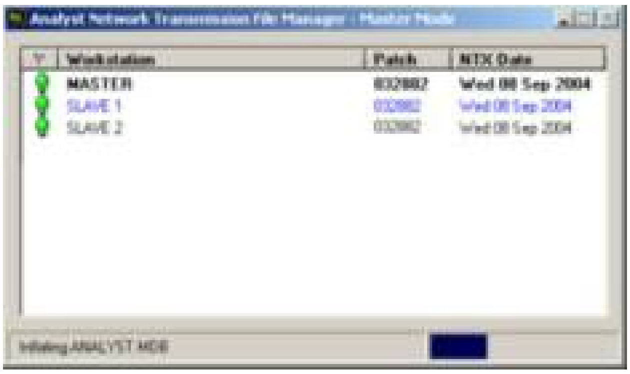



When the master terminal sends the command to the slaves Analyst is closed and/or prevented from being opened whist the NTX file is built. Analyst is then re-opened or released to open and the NTX file is inflated and put in place as the backup database.




**Shut-Down Required**
Analyst will close on this terminal will in 20 seconds or when **OK** is pressed unless **Cancel** is pressed. Pressing **cancel** delays the attempt to build the NTX by 10 minutes when the procedure recommences. At each attempt it can be delayed for a further 10 minutes.


**Analyst Startup Pending**
Whilst the NTX file is building Analyst is prevented from opening. The progress bar displays how much of the NTX file has been built on the master.



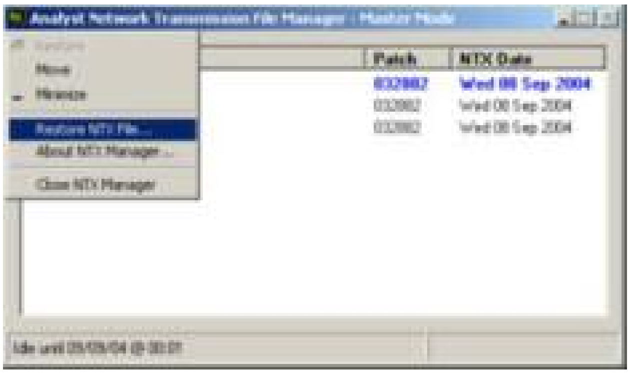

**Inflating Analyst.mdb**
Once the master has sent the latest NTX file to this slave, this local version decompresses the file and replaces the local database.

## Restoring an NTX

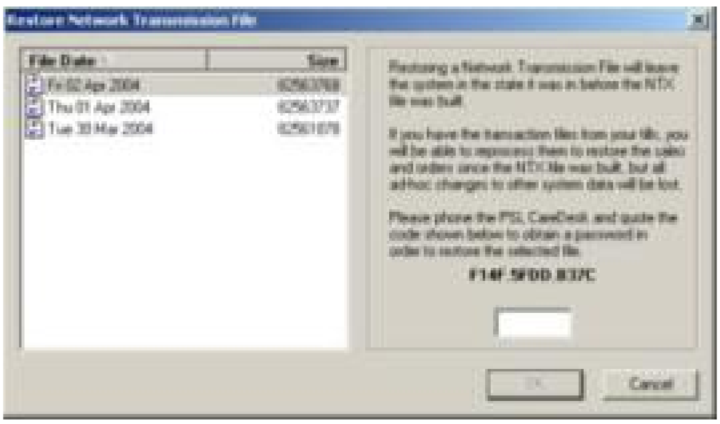
Restoring an NTX file will replace the live database on the master with the database compressed into the NTX which was is restored. Because of this potential loss of data this feature is password protected and cannot be preformed without the involvement of the CareDesk. You may need to perform this step if you are restoring a backup of an NTX.

Close Analyst on all terminals in the system. Double click the file compression icon at the bottom right of the desktop next to the time to display the NTX Manager.

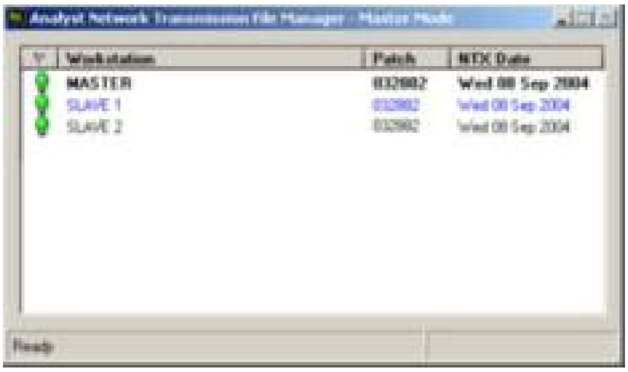
Now left click the icon in the top left of the NTX Manager or right click anywhere in the title bar and select **Restore NTX File**.




The Restore NTX screen is displayed. On the left is a pane which lists all available NTX files on this terminal. These are usually limited to the maximum number of files specified in the Network Tab of the system configuration but if an NTX backup has just been restored there may be extra files displayed. Each file is displayed with the date the database was last used, not necessarily the date the NTX was made, and its size in bytes.



Select the NTX file to restore and call the CareDesk quoting the security code displayed on the right. They may ask a few questions to confirm who you are and why you are restoring an NTX and when they are satisfied they will supply you with a password to enter. Do not dismiss this dialogue whilst calling for a password as the security code changes each time viewed. Press OK which illuminates when the correct password is entered.




The NTX will then be inflated and when complete replaces the system's database.

You may wish to Reprocess Transactions to update the system with sales made and purchases received after the NTX file was built.

# Archive Utility

## Time to Archive?

As you use your Analyst system the database will increase in size. This is perfectly natural and to be expected as everything done on the system is logged. This is crucial to allow the re-ordering and report sections of the system to function correctly.

After time however, the database will contain information which is no longer referred to by the re-ordering algorithm or any of the standard reports. This 'excess data' will start to have an impact on the speed of the software, particularly backups, the NTX file creation and when loading a patient's dispensing history.

With the archive utility, this excess data can be removed from the database. Certain information is removed and placed elsewhere, whilst some is simply deleted.

**What is deleted and what impact will that have?**

The information that is deleted is the detail of each action performed on each of the terminals in the system for each day. It is this information that is the backbone of the Previous Sales/Dispensing screen. This can quickly mount up considerably on multi-terminal busy shops.

When deleted, the only impact will be that any receipts issued with Analyst PoS during the period archived will not recall the sale details. Any reports run for the archived period will only provide monthly totals. Specific daily totals will no longer be available.

The Audit trail is broken down on a per-day per till basis and stored as XML files which can be viewed at a later date using Internet Explorer.

The PMR patient history is moved to a separate database which is not routinely used by Analyst. This archived dispensing data though is available at the touch of a button. Archived data however although available for reference will not be initially displayed unless requested and will not be used in interaction checking.

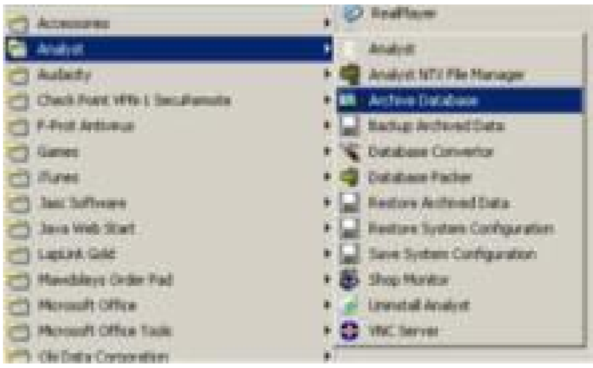
**Important** - Archived data, although partially accessible to view cannot be put back into the live database. This will reduce your ability to search through the Audit Trail or check customer interactions. Think carefully before entering the dates on the archiving screens.

## Launching the Archive Utility

Depending on the amount of data to be archived and the speed of the terminal running the archive this procedure can take several hours to complete.

Although most of this can be performed whilst the system is in use, it would have a significant impact on the system speed. It is advisable to plan to do this out of hours or to arrange with the CareDesk to use the slave terminals off-line whilst archiving on the master.

This utility should be used on the master terminal. To launch archive utility close Analyst and return to the Windows Desktop. Click the **Start** button and **Programs/All Programs**. Then select **Analyst** and **Archive Database**.



The Archive initial screen will appear.

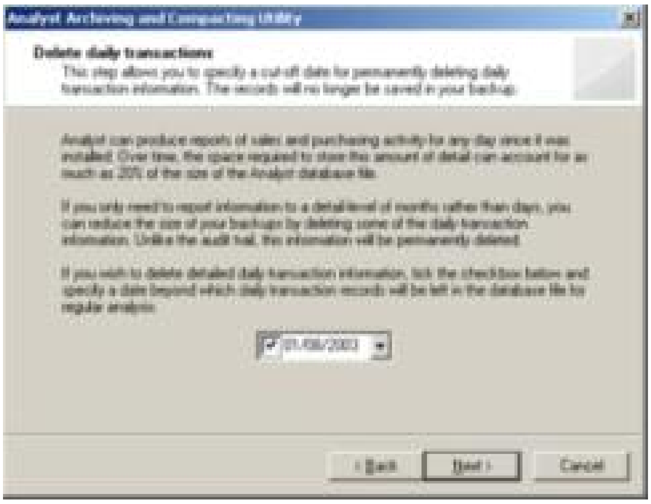

This screen explains the procedure, when you have read it press **Next**.

## Entering the Archive Dates

In the next three screens you are asked to enter the dates you wish to archive up to. By default the system suggests you retain the last year's data. This can be increased or reduced if desired but must not fall below 28 history for the audit trail and daily transactions or the PMR data history period for PMR history.

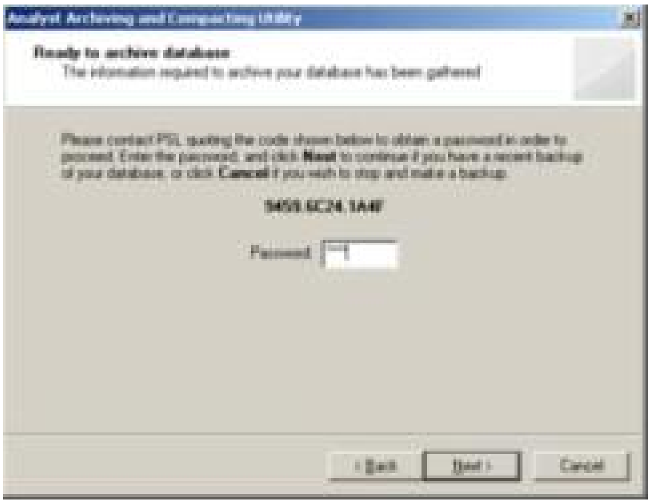
The audit trail will be removed from the Analyst database and stored as separate files from as far back in history as there is data up to the date you enter here. The system will suggest that an audit trail of roughly one year is sufficient to keep in the database, earlier information can be archived.

Change the date to archive up to if required, or remove the tick if you do not want to archive the audit trail. Press **Next** when you have read the details on the screen and entered the date.




The procedure is repeated in the next screen for the daily transactions. This information however is deleted from the database. Again, the system suggests that you retain one year's information. Carefully read the screen and press **Next** when complete.


On the final date entry screen, read the details and confirm or change the date to archive up to. This date can not be more recent that the start of the default PMR history found on the Dispensing Tab of the PMR System configuration. The information date prior to this will be moved to a separate database which will be accessible on-demand but will not be accessed or processed by routine.



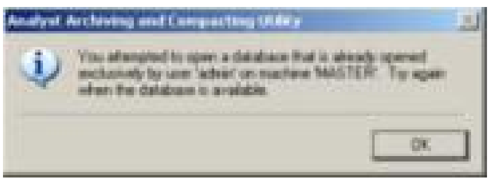

For your security this utility is password protected. To obtain the password call the CareDesk on 01254 833310 and quote the security code. You will receive a four digit code to enter. When you have entered the code and are happy that the details you have entered are correct, press **Next** to begin the archive.

## During the Archive

During the archive procedure, if you are still using the tills, you will find that they run slower as the master will be processing the archive data.


The progress bar provides an indication of how long this will take. The data must be archived for each till, busier tills build more information and so will take longer.

When the utility has archived the audit trail and deleted the daily transactions the system will perform a compact to compress the database to its new size. If the tills are still being used the utility will crash as it requires exclusive access to the database to do this.



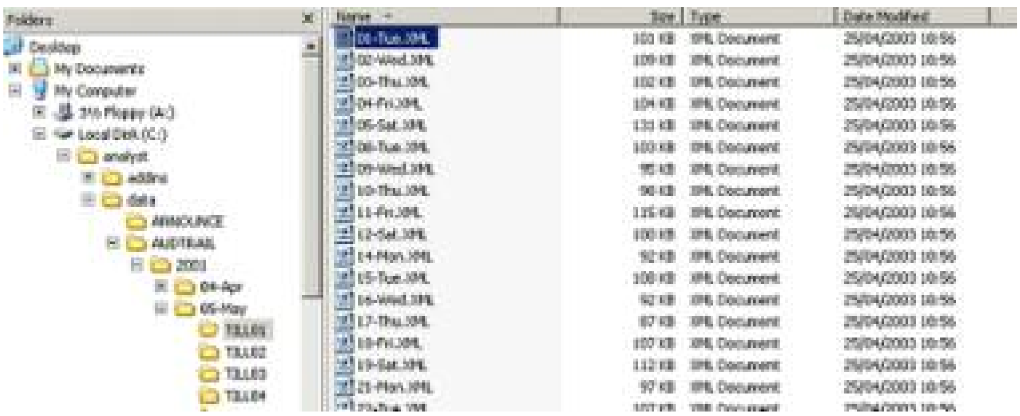
Press **OK** to dismiss the message, no damage is caused by this error, but the benefits of archiving are not apparent until the database has been compacted. At the next opportunity, all the tills should be closed down and the master should be returned to the desktop. On the master select **Start**, **Programs**, **Analyst** then **Database Packer**. This will take several minutes, but will compress the database to its optimum size.

If the tills were not being used, the utility will run the database compression automatically and will provide a summary screen when complete.


This window displays the number of lines that have been archived and the new size of the database. Press **Finish** to close the utility and return to Windows. Your system is now ready for use once again.

## Backing Up and Reviewing PoS Data

The audit trail data should now be backed up in case of any drive failures. Find a new high capacity backup disk (LS120, ZIP or CD) and insert into the drive. Open Windows Explorer and browse into **C:\ANALYST\DATA\AUDTRAIL.**



From the AUDTRAIL folder, a folder structure of YEAR\MONTH\TILLNUM has been created.

In each folder are the archived files. A different file is created for each day. They can be viewed by double clicking on them, which will open Internet Explorer and display the contents.


Ref: 62270
Assistant: All Staff
Date: 08/05/01 @ 09:08

| | | |
|---|---|---|
| <Nhs> | NHS SCRIPS | 6.10 |
| | BALANCE | 6.10 |
| | CASH | -10.10 |

Ref: 62271
Assistant: All Staff
Date: 08/05/01 @ 09:09

| | | |
|---|---|---|
| <Nhs> | NHS SCRIPS | 6.10 |
| | *Refund (not re-stocked)* | -6.10 |
| | BALANCE | -6.10 |
| | CASH | 6.10 |

These should be copied to the backup drive and kept off-site as a backup of your audit trail.

## Recalling and Backing Up PMR Data

Unlike the PoS data, the PMR can be recalled and reviewed from within Analyst PMR. This can only be done on a per-patient basis however.

Expand the patient details and click on the **History** tab. The dispensing history which is held in the live database for this patient is displayed in the main pane. Click on the **Archive** button at the bottom right to add the data held in the archive to the list.

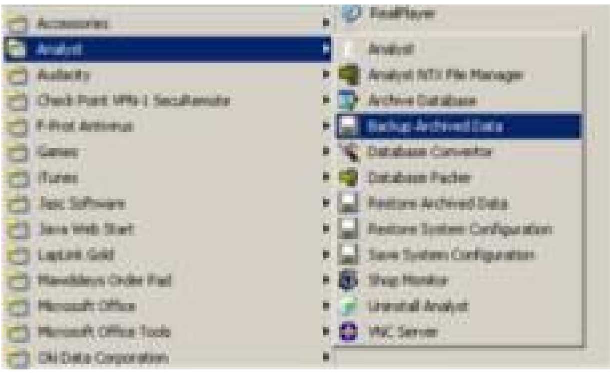

The main pane is now populated with the archive data.

A new column has appeared to differentiate between live and archive details. Details retrieved from the archive display a disk icon next to them. These lines can still be highlighted and examined as though they are in the live database.

### Backing up the Archive

Backing up the PMR data archive is of paramount importance although unlike the live database it only needs to be backed up after the archive utility has been used to initially create or update the archive database. The system will prompt you to backup the archive until you do so.

Use a new disk and from the Windows Desktop click the **Start** button and **Programs** (**All Programs**). Click the **Analyst** options and select **Backup Archived Data**.



After a warning that the backup is not the live database the backup sequence will begin and will request the disks to do so. When complete this disk set should be kept off-site in a safe place.

# Base Currency Converter

## Converting Currencies

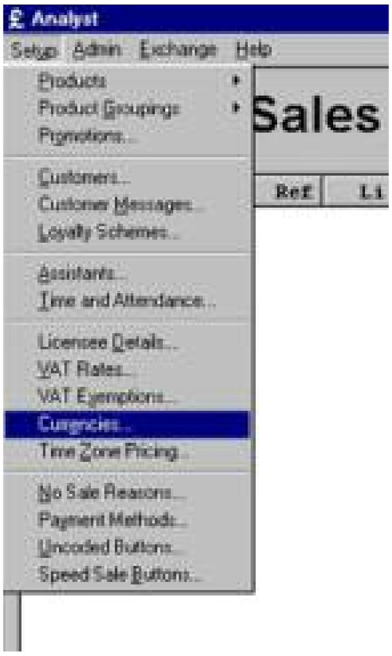
This utility was developed in 2001 in anticipation of the mass currency change in 12 European countries on the 1st January 2002. Analyst was in use in the Republic of Ireland at this time and the changeover procedure, with the help of our Irish customers went extremely smoothly. On this basis we are confident that if the UK chooses to adopt the Euro in the future, the conversion of Analyst to the new currency will be the least of your worries during the changeover period.

This guide was originally issued to the users of Analyst in the Republic of Ireland and so explains the conversion of the Irish Pound or Punt to Euros.

Using Analyst as a Multi-currency system without converting the base currency is explained in the Currencies section.

## Preparing the system in the Republic of Ireland

Until 1st January 2002, only the Irish Punt will be accepted in payment for goods. On the 9th February 2002 only the Euro will be accepted. In between though, both currencies will be accepted but change from sales will only be issued in Euros.




The base currency in Ireland will be converted to the Euro on the 1st January 2002.

To prepare your Analyst system for the changeover and to comply with the guidelines on dual pricing, your system will need to be setup to recognise the Euro at the fixed exchange rate of €1=IEP0.787564 before the 1st January 2002. To do this, open your Analyst PoS and wait until the Previous Sales screen is displayed. From the top left of the screen choose **Setup** and then **Currencies**.


This will open a new window displaying the currencies that are already setup in the system. By default this is Pounds Sterling. To change this,  press the **Edit** button.


Change the Description to Irish Punts.

Change the ISO Code to IEP from the drop down box.

Change the Cheque wording to PUNTS

Press or click the OK Button.

The currencies screen reappears now with the Irish Punt as the only currency highlighted.

### Adding the Euro

We are now ready to add the Euro to the system. To do this press the **New** button.


A new, blank Currency Details screen opens ready for us to fill in the details for the Euro.

Type in the following information.

Description - **Euro**

ISO Code - **EUR** (from the drop down box)

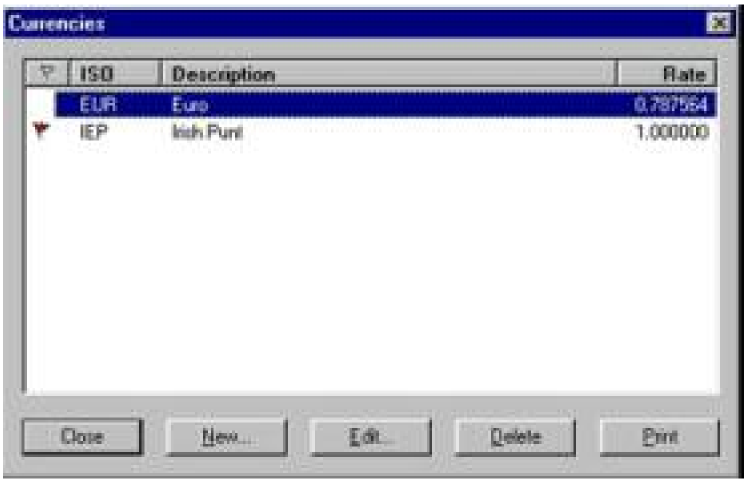
Currency Symbol - **€** (from the drop down box)

Cheque Wording - **EUROS**

From Default - **1.269738** (this will calculate the rate 'To Default' as 0.787564).

Your screen should now look like below.

Now press or click OK and return to the Currencies screen. You can see the rate of 0.787564 next to the Euro Currency.




The Euro is now setup on your system. Currently though, Irish Punt is still the default currency as indicated by the small red flag next to the Punt. Your dual pricing options should now become available when you next print off any labels.

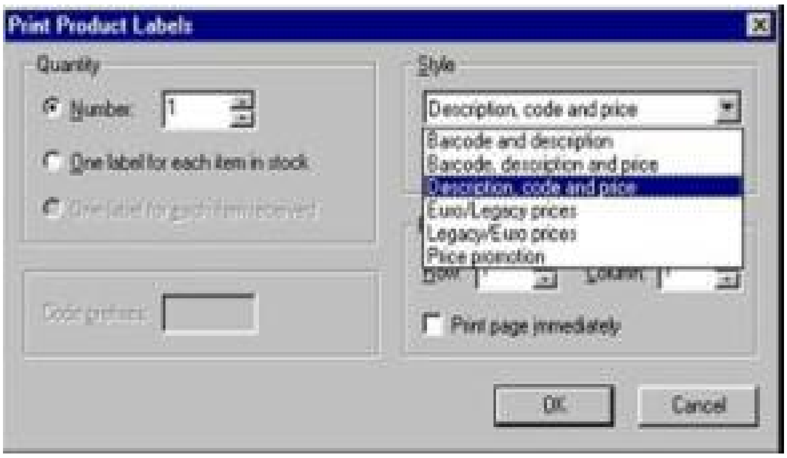
We shall have a look at how to print these on the next page.

## Printing Dual priced Shelf Edge Labels

Dual priced labels are only available when printing from an A4 Laser Printer. These labels cannot be printed onto the sticky labels from your receipt printer.

To print these off, generate your list of products you wish to make labels for in the usual way. Using the reports function is most popular, so we shall use that method.

With the report on screen, tag the items you would like labels for or press **CTRL-A** for all lines and then press **Tags** and then press **Labels**. When the label printing screen appears, click on the Style box to reveal all of the options.




You will see that two new styles are in the list. **Euro/Legacy price** are to display the Euro as the main price and **Legacy/Euro price** are to show the Legacy (the previous main currency before the Euro). Choose whichever is appropriate at the time.

Before the 1st January when the Punt is still the base currency, the Legacy/Euro prices is better. But after the new year when the base currency has changed the Euro will be better as the main price.

## The Changeover

Between the close of trade in December 2001 and re-opening for trading in January 2002 there is a routine that will need to be run on Analyst to change the base currency from Punts to Euros and to set the system to always give change in Euros.

We have developed a utility which can do this relatively quickly and easily, by following the instructions below you should have your database converted in no more than an hour, depending on the size of your database and the speed of your till/computer.

Part of the database converter program requires a password to be provided by the CareDesk to ensure that the converter is not run by someone who shouldn't run it at a time they shouldn't run it. If you cannot run the converter when the CareDesk is open over the New Year period, let us know and we will try and make some special arrangements for you.

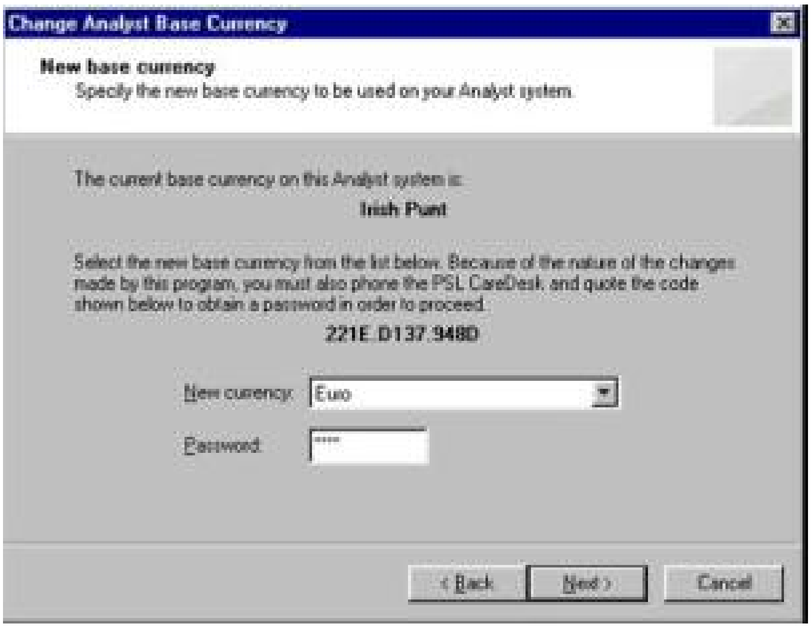
We will speak to you in the week leading up to the New Year to check that you understand the routine and to answer any questions about it.

## Converting the Database

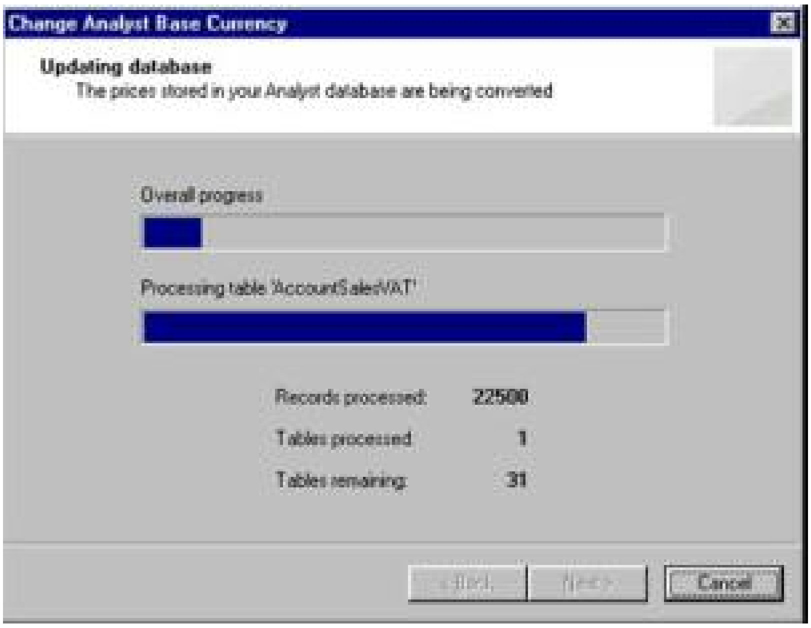
1. Make a backup of the database as usual. The utility will not run if a backup has not been performed.
2. When complete close Analyst PoS and PMR on all systems but leave the master on the Windows desktop.
3. Click the **Start** button and select **Run**.
4. Type C:\ANALYST\BASECURR and click OK.
5. 


   The Analyst Base Currency Converter will load up. Read all the information on the screens carefully, and answer appropriately. The screens will look like this.

Ensure you have made a backup before starting the Converter




Call the CareDesk and quote the code given on this screen. Enter the code given in response. The next button will only illuminate when you have entered a valid code. Do not exit this screen when you call the CareDesk, the code on this screen changes every time it is viewed.




The two blue bars indicate how the converter is progressing. The top bar is the overall progress, the bottom bar is the progress of the current table. The number of tables complete and remaining are stated at the bottom.


Some tables are larger than others and therefore may take longer.

When the converter is complete, it will display a summary of what it has changed. It lists all of the tables of information it has scanned through and how many records it has changed in each table.

At the top of the screen it confirms that the new base currency is the Euro. This means that all accounts, prices etc have been converted and will now be displayed in Euros by default. The currency we have converted from is called the Legacy currency, prices can be converted back into this, but only for reference. When you are happy that the number of records is roughly what you expected press **Finish**.

## Setting up Analyst

The way the Irish Government have decided to withdraw the Punt from circulation is to continue to accept the currency for goods, but not to issue any back to the public during the 6 week changeover period. Consequently all change must now be issued in Euros, so we need to configure Analyst to do this.

On the server Launch Analyst PoS and choose **Setup** from the top left and then **Currencies** from the drop down menu.

Select the Euro from the list of currencies (which will now have the red flag next to it) and press **Edit**. In the screen that appears we need to put a tick in two of the boxes at the top.


Click on the boxes to place a tick next to the following options:

**Always give change in this currency** and **Show legacy currency conversion rate on receipt.**

This last option allows for the conversion rate to still be displayed on the till receipts whilst everyone is still getting used to the Euro. This option can be disabled after 6 weeks when the Euro is the only legal tender.

# Index


**A**
Archive ................................. 18, 21, 22, 23
Archive Utility ........................................ 18
Automatic Printing .................................... 6
**B**
Batched Price Changes ............................ 6
Brewhurst .................................................. 5
**C**
C&D .......................................................... 2
Chemist & Druggist .................................. 2
Currencies ............................................... 25
**D**
Data Exchange ...................................... 2, 7
Database Packer .................................... 21
Database Updates .................................... 1
DFU ........................................................... 3
Drug File Update ...................................... 3
**E**
Euro .......................................... 25, 28, 29
Exchange .................................................. 1
**F**
Force Prices ............................................. 4
**H**
HSP ........................................................... 5
**I**
Impending Price Change ......................... 4
ISU ............................................................ 2
**L**
Labels ....................................................... 6
Line/internet ............................................ 1
Londis ....................................................... 1
**M**
Master Mode ........................................... 13
Multi-currency ......................................... 25
**N**
NTX ......................................................... 12
NTX File .................................................. 12
NTX Manager .......................................... 12
Numark ................................................. 1, 4
Numark Update ........................................ 4
**O**
OTC Database .......................................... 2
**P**
Patches ..................................................... 9
Price Changes ........................................... 1
Price Updates ............................................ 4
Product Recommendations ...................... 8
PSL Data Exchange ............................. 3, 7
PSL Newsletter .................................... 2, 3
PSL Source ................................................ 4
**R**
Recommendation Query .......................... 8
Restoring ................................................. 16
**S**
Slave Mode .............................................. 15
Software Patches ...................................... 9
Solgar ....................................................... 5
Suma ......................................................... 5
SureCover ................................................. 1