

# APP USER GUIDE

EVOLVING OPERATING ROOM EFFICIENCY

DINAMIC **OR<sup>+</sup>**



# DISTRIBUTORS

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# DISTRIBUTOR ADMIN

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## DISTRIBUTOR SETUP

01. Select "[Distributor's Setup](#)" icon from menu bar on the left
02. Select "Edit" top right corner
03. Edit Basic Details as needed
04. Select "Save"

## VIEW MANUFACTURERS/HOSPITALS ASSIGNED TO DISTRIBUTOR

01. Select "[Distributor's Setup](#)" icon from menu bar on left
02. View Manufacturers/Hospitals under Assigned Manufacturers/Hospitals

[Upcoming Cases](#) - Cases that have been scheduled

[Live Cases](#) - Cases currently being conducted

[Manufacturer Procedures](#) - manufacturer created surgical templates

[My Procedures](#) - custom surgical templates created by you for your hospitals and surgeons

[Manufacturer Trays](#) - manufacturer created trays

[My Trays](#) - custom trays created by you for your hospitals and surgeons

[Manufacturer Instruments](#) - manufacturer created instruments

[My Instruments](#) - custom instruments created by you for your hospitals and surgeons

**PLEASE NOTE:** Hospitals and Manufacturers will be assigned by the DinamicOR Super Admin



[Distributor's Setup](#)

## ADDING USERS TO DISTRIBUTOR

01. Select "Distributor's Users" icon from menu bar on the left
02. Select "Add User" top right corner
03. Enter Details
04. Assign "Role" as "Distributor Admin" or "Medical Representative" and select "Done"
05. Select "Add" to save information



Distributor's Users



Horizontal Menu

## EDITING/DELETING/RESENDING INVITE TO DISTRIBUTOR USERS:

01. Select "Distributor's Users" icon from menu bar on the left
02. Select Horizontal Menu icon on user wish to edit/delete
  - a. **Delete**
    - i. Select "Delete"
    - ii. Confirm by Selecting "Delete"
  - b. **Edit**
    - i. Select "Edit"
    - ii. Edit Details
    - iii. Select "Save"
  - c. **Resend Invite**
    - i. Select "Resend Invite"

## VIEW HOSPITALS ASSIGNED TO DISTRIBUTOR

01. Select "Hospitals" icon from menu bar on the left
02. All "Hospitals" Assigned can be viewed

## VIEW UPCOMING CASES AT HOSPITALS ASSIGNED TO DISTRIBUTOR

01. Select "Hospitals" icon from menu bar on the left
02. Select Hospital to view cases (Ability to Search by Hospital Name in search bar)
03. Select "Upcoming Cases"

## VIEW LIVE CASES AT HOSPITALS ASSIGNED TO DISTRIBUTOR

01. Select "Hospitals" icon from menu bar on the left
02. Select hospital to view cases (Ability to Search by Hospital Name in search bar)
03. Select "Live Cases"



Hospitals

## VIEW MANUFACTURER INSTRUMENTS

01. Select "Instrument" tab from menu bar on the left
02. Select "Manufacturer's Instruments"
03. Select Instrument you wish to view (Ability to Search by Instrument Name in search bar as well as Manufacturer in dropdown menu)

## VIEW MY INSTRUMENTS

01. Select "Instrument" tab from menu bar on the left
02. Select "My Instruments"
03. Select Instrument you wish to view (Ability to Search by Instrument Name in search bar)



Instruments



Search

## ADD INSTRUMENTS

01. Select "Instruments" icon from menu bar on the left
02. Select "My Instruments"
03. Select "Add Instrument"
04. Enter Details ( Instrument Name, Description, Image, Video)
05. Select "Add Image"
  - a. Choose "Take photo" (take photo using ipad camera) and Select "Use Photo" or "Retake"

OR

  - b. Choose "Photo library" (search and select photo stored on ipad) and Select "Done"
06. Crop and edit selected photo
07. Select "Yellow Check Mark" in upper left corner upon completion or "Blue X" to cancel
08. Select "Add Video" (if a video is required)
  - a. Choose "Take video" (take video using ipad camera) and Select "Use Video" or "Retake"

OR

  - b. Choose "Video library" (search and select video stored on ipad) and Select "Done"
09. Select "Add" to save



Instruments

## EDIT/DELETE INSTRUMENTS

01. Select "Instruments" icon from menu bar on the left
02. Select "My Instruments"
03. Select Horizontal Menu icon on Instrument wish to edit/delete
  - a. **Delete**
    - i. Select "Delete"
    - ii. Instrument will be moved to Deleted Instrument
      1. Deleted Instrument can be viewed by Selecting Horizontal Menu icon next to Add Instrument button
        - a. Select "Deleted Instruments"
  - b. **Edit**
    - i. Select "Edit"
    - ii. Edit Details (Instrument Name, Description, Image/Video) as needed
    - iii. Select "Save"



Instruments



Horizontal Menu

## VIEW DELETED INSTRUMENTS

01. Select "[Instruments](#)" icon from menu bar on the left
02. Select "My Instruments"
03. Select [Horizontal Menu](#) icon top right corner
04. Select "Show Deleted Instruments"

## VIEW MANUFACTURER TRAYS

01. Select "[Trays](#)" icon from menu bar on the left
02. Select "Manufacturer's Trays"
03. Select Tray you wish to view (Ability to [Search](#) by Tray Name in search bar as well as Manufacturer in dropdown menu)

## VIEW MY TRAYS

01. Select "[Trays](#)" icon from menu bar on the left
02. Select "My Trays"
03. Select Tray you wish to view (Ability to [Search](#) by Tray Name)



[Instruments](#)



[Horizontal Menu](#)



[Trays](#)



[Search](#)

## ADD TRAY

01. Select "**Trays**" icon from menu bar on the left
02. Select "My Trays"
03. Select "Add Tray"
04. Enter Tray Details ( Name, Description, Image)
05. Select "Tap to upload an image"
  - a. Choose "Take photo" (take photo using ipad camera) and Select "Use Photo"

**OR**

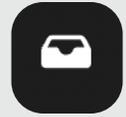
  - b. Choose "Photo library" (search and select photo stored on ipad)
06. Crop and edit selected photo
07. Select "Yellow Check Mark" in upper left corner upon completion or "Blue X" to cancel
08. To add Instrument(s) to the tray, select "Search by Instrument" under "Add Instruments"
09. Search for and "Check" all Instrument(s) to add to tray
10. Select "Add" to save tray and Instrument(s)



**Trays**

## EDIT/DELETE TRAYS

01. Select **Trays** icon from menu bar on the left
02. Select “My Trays”
03. Select **Horizontal Menu** icon on tray to Edit/Delete
  - a. **Delete**
    - i. Select “Delete”
    - ii. Tray will be moved to Deleted Trays
      1. Deleted Trays can be viewed by selecting **Horizontal Menu** icon next to “Add Tray”
        - a. Select “Show Deleted Trays”
  - b. **Edit**
    - i. Select “Edit”
    - ii. Edit Tray Details (Tray Name, Tray Description, Tray Image) as needed
    - iii. Add Instruments
      1. Select “Search by Instrument”
      2. Select “Instrument(s)” to be added (Ability to select multiple items)
    - iv. Select “Save”



**Trays**



**Horizontal Menu**

## VIEW DELETED TRAYS

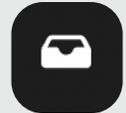
01. Select "Trays" icon from menu bar on the left
02. Select "My Trays"
03. Select Horizontal Menu icon top right corner
04. Select "Show Deleted Trays"

## VIEW MANUFACTURER'S PROCEDURES

01. Select "Procedures" icon from menu bar on the left
02. Select "Manufacturer's Procedures"
03. Select Procedure to view (Ability to Search by Procedure Name in search bar as well as Manufacturer in dropdown menu)

## VIEW MY PROCEDURES

01. Select "Procedures" icon from menu bar on the left
02. Select "My Procedures"
03. Select Procedure to view (Ability to Search by Procedure Name in search bar)



Trays



Horizontal Menu



Procedures



Search

## CREATE PROCEDURES BY CLONING MANUFACTURER PROCEDURES

01. Select "Procedures" icon from the menu bar on the left
02. Select "Manufacturer's Procedures"
03. Select Vertical Menu on manufacturer procedure you wish to clone
04. Select "Clone"
05. Enter Procedure Name (required) and Procedure Description (optional)
06. Click "Continue" to bring you to the "Table Setup" page
  - a. **Edit Table Set up**
    - i. *Choose appropriate table size (2 wide or 3 wide) by selecting table size selector box in upper right corner*
    - ii. *To remove trays*
      1. Select the "X" in upper right corner of appropriate tray
      2. Select "Save"
    - iii. *To move trays from one location to another*
      1. Touch and hold to drag and drop to appropriate location
      2. "Save"
    - iv. *To add trays*
      1. Select " Case Cart Management"
      2. Select "Add/Manage Trays"
      3. Select "Search by Tray Name" to enter tray name or scroll through list of trays
      4. Select the plus icon, "+" to add tray(s) (Note: Ability to select multiple trays)
      5. Select "Done" once all desired trays have been selected



Procedures



Vertical Menu

6. Select “Case Cart Management” button to see selected trays
7. Touch and hold on tray to drag and drop to desired location on Table Setup (Repeat for all trays)
8. Select “Save” when complete (Note: Individual trays can be viewed along with the tray’s assigned Instruments by selecting the tray)

**b. Edit the Surgical Flow**

- i. *Select “Surgical Flow”*
- ii. *Select “Edit” to Add/Delete/Change (Surgical Step, Checklist, Notes, and Phase)*
- iii. *Select desired option (Surgical Step, Checklist, Notes, and Phase) to Edit*
- iv. *Select “Plus” icon (+) to add desired option*
  1. Surgical Step
    - a. Enter Label
    - b. Enter Needed Instrument(s) (search by name and select all desired Instrument(s) (Note: Instruments are required to save step)
    - c. Enter Description & Notes (optional)
    - d. Upload Video from Library or take a video if applicable (click on video tab)
    - e. Select “Save”
  2. Checklist
    - a. Enter Label
    - b. Enter Items
    - c. Add Item (Repeat as necessary for all items desired for checklist)
    - d. Select “Save”
  3. Notes
    - a. Enter Step Label
    - b. Enter Notes & Description
    - c. Select “Save”
  4. Phase

- a. Enter phase label
    - b. Select "Save"
  - 5. Change/move position of individual Surgical Step, Checklist, Notes, and Phase
    - a. Select and hold 6 dots to the right of the Surgical Step, Checklist, Note, or Phase
    - b. Move selection to new position and release
- c. Once Surgical flow is completed press "Done"

Once completed the new cloned procedure can be accessed in My Procedures

## CREATE PROCEDURES BY CLONING MY PROCEDURES

01. Select "Procedures" icon from the menu bar on the left
02. Select "My Procedures"
03. Select Vertical Menu on procedure you wish to clone
04. Select "Clone"
05. Enter Procedure Name (required) and Procedure Description (optional)
06. Click "Continue" to bring you to the "Table Setup" page
  - a. **Edit Table Set up**
    - i. *Choose appropriate table size (2 wide or 3 wide) by selecting table size selector box in upper right corner*
    - ii. *To remove trays*
      1. Select the "X" in upper right corner of appropriate tray
      2. Select "Save"
    - iii. *To move trays from one location to another*
      1. Touch and hold to drag and drop to appropriate location
      2. "Save"
    - iv. *To add trays*
      1. Select " Case Cart Management"
      2. Select "Add/Manage Trays"
      3. Select "Search by Tray Name" to enter tray name or scroll through list of trays
      4. Select the plus icon, "+" to add tray(s) (Note: Ability to select multiple trays)
      5. Select "Done" once all desired trays have been selected



Procedures



Vertical Menu

6. Select “Case Cart Management” button to see selected trays
7. Touch and hold on tray to drag and drop to desired location on Table Setup (Repeat for all trays)
8. Select “Save” when complete (Note: Individual trays can be viewed along with the tray’s assigned Instruments by selecting the tray)

**b. Edit the Surgical Flow**

- i. *Select “Surgical Flow”*
- ii. *Select “Edit” to Add/Delete/Change (Surgical Step, Checklist, Notes, and Phase)*
- iii. *Select desired option (Surgical Step, Checklist, Notes, and Phase) to Edit*
- iv. *Select “Plus” icon (+) to add desired option*
  1. Surgical Step
    - a. Enter Label
    - b. Enter Needed Instrument(s) (search by name and select all desired Instrument(s) (Note: Instruments are required to save step)
    - c. Enter Description & Notes (optional)
    - d. Upload Video from Library or take a video if applicable (click on video tab)
    - e. Select “Save”
  2. Checklist
    - a. Enter Label
    - b. Enter Items
    - c. Add Item (Repeat as necessary for all items desired for checklist)
    - d. Select “Save”
  3. Notes
    - a. Enter Step Label
    - b. Enter Notes & Description
    - c. Select “Save”
  4. Phase

- a. Enter phase label
  - b. Select "Save"
- 5. Change/move position of individual Surgical Step, Checklist, Notes, and Phase
  - a. Select and hold 6 dots to the right of the Surgical Step, Checklist, Note, or Phase
  - b. Move selection to new position and release
- c. Once Surgical flow is completed press "Done"

Once completed the new cloned procedure can be accessed in My Procedures

## CREATE PROCEDURES FROM SCRATCH

01. Select "**Procedures**" icon from the menu bar on the left
02. Select "My Procedures"
03. Select "Create Procedure"
04. Enter Procedure Name (required) and Procedure Description (optional)
05. Click "Create" to bring you to the "Table Setup" page
  - a. **Table Setup**
    - i. Choose appropriate table size (2 wide or 3 wide) by selecting table size selector box in upper right corner
    - ii. Select "Case Cart Management"
    - iii. Select "Manage Trays"
    - iv. Select "Search by Tray Name" to enter tray name or scroll through list of trays
    - v. Select the plus icon, "+" to add tray(s) (Note: Ability to select multiple trays)
    - vi. Select "Done" once all desired trays have been selected
    - vii. Select "Case Cart Management" button to see selected trays
    - viii. Press and hold on tray to drag and drop to desired location on Table Setup (Repeat for all trays)
    - ix. Select "Save" when complete (Note: Individual trays can be viewed along with the tray's assigned instruments by selecting the tray)
  - b. **Surgical Flow**
    - i. Select on "Surgical Flow" tab
    - ii. Select "Edit"
    - iii. Select "Plus" (+) button



**Procedures**

- iv. *Select desired option (Surgical Step, Checklist, Notes, and Phase)*
  - 1. Surgical Step
    - a. Enter Label
    - b. Enter Needed Instruments (search by name and select all desired Instruments) (Note: Instruments are required to save step)
    - c. Enter Description & Notes (optional)
    - d. Upload or take a video if applicable (click on video tab)
    - e. Select "Save"
  - 2. Checklist
    - a. Enter Label
    - b. Enter Items
    - c. Add Item (Repeat as necessary for all items desired for checklist)
    - d. Select "Save"
  - 3. Notes
    - a. Enter Step Label
    - b. Enter Notes & Description
    - c. Select "Save"
  - 4. Phase
    - a. Enter phase label
    - b. Select "Save"
- c. **Once Surgical flow is completed press "Done"**

Once completed the new procedure can be accessed in My Procedures

## DELETE/EDIT PROCEDURES

01. Select "**Procedures**" icon from menu bar on the left
02. Select "My Procedures"
03. Select **Vertical Menu** on procedure you wish to Delete/Edit
  - a. **Delete**
    - i. *Type Procedure Name to Confirm Delete*
    - ii. *Select "Delete"*
  - b. **Edit**
    - i. *Edit Table Set up*
      1. Choose appropriate table size (2 wide or 3 wide) by selecting table size selector box in upper right corner
      2. To remove trays
        - a. Select the "X" in upper right corner of appropriate tray
        - b. Select "Save"
      3. To move trays from one location to another
        - a. Touch and hold to drag and drop to appropriate location
        - b. Select "Save"
      4. To add trays
        - a. Select "Case Cart Management"
        - b. Select "Add/Manage Trays"
        - c. Select "Search by Tray Name" to enter tray name or scroll through list of trays
        - d. Select the plus icon, "+" to add tray(s) (Note: Ability to select multiple trays)
        - e. Select "Done" once all desired trays have been selected



**Procedures**



**Vertical Menu**

- f. Select “Case Cart Management” button to see selected trays
  - g. Touch and hold on tray to drag and drop to desired location on Table Setup (Repeat for all trays)
  - h. Select “Save” when complete (Note: Individual trays can be viewed along with the tray’s assigned Instruments by selecting the tray)
- ii. *Edit the Surgical Flow*
1. To Add/Delete/Change (Surgical Step, Checklist, Notes, and Phase)
  2. Select “Edit”
  3. Select desired option (Surgical Step, Checklist, Notes, and Phase) to Edit
  4. Select “Plus” icon (+) to add desired option
    - a. **Surgical Step**
      - i. *Enter Label*
      - ii. *Enter Needed Instrument(s) (search by name and select all desired Instrument(s) (Note: Instruments are required to save step)*
      - iii. *Enter Description & Notes (optional)*
      - iv. *Upload or take a video if applicable (click on video tab)*
      - v. *Select “Save”*
    - b. **Checklist**
      - i. *Enter Label*
      - ii. *Enter Items*
      - iii. *Add Item (Repeat as necessary for all items desired for checklist)*
      - iv. *Select “Save”*
    - c. **Notes**
      - i. *Enter Step Label*
      - ii. *Enter Notes & Description*
      - iii. *Select “Save”*
    - d. **Phase**
      - i. *Enter phase label*



## VIEW DELETED PROCEDURES

01. Select "Procedures" icon from menu bar on the left
02. Select "My Procedures"
03. Select Horizontal Menu icon top right corner
04. Select "Show Deleted Procedures"



Procedures



Horizontal Menu

# DISTRIBUTOR MEDICAL REPRESENTATIVE

## VIEW MANUFACTURERS/HOSPITALS ASSIGNED TO MEDICAL REPRESENTATIVE

01. Select "[Distributor's Setup](#)" icon from menu bar on left
02. View Manufacturers/Hospitals under Assigned Manufacturers/Hospitals

## VIEW HOSPITALS ASSIGNED TO MEDICAL REPRESENTATIVE

01. Select "[Hospitals](#)" icon from menu bar on the left
02. All hospitals assigned can be viewed

[Upcoming Cases](#) - Cases that have been scheduled

[Live Cases](#) - Cases currently being conducted

[Manufacturer Procedures](#) - manufacturer created surgical templates

[My Procedures](#) - custom surgical templates created by you for your hospitals and surgeons

[Manufacturer Trays](#) - manufacturer created trays

[My Trays](#) - custom trays created by you for your hospitals and surgeons

[Manufacturer Instruments](#) - manufacturer created instruments

[My Instruments](#) - custom instruments created by you for your hospitals and surgeons

**PLEASE NOTE:** Hospitals and Manufacturers will be assigned by the DinamicOR Super Admin



[Distributor's Setup](#)



[Hospitals](#)

## VIEW UPCOMING CASES AT HOSPITALS ASSIGNED TO MEDICAL REPRESENTATIVE

01. Select "Hospitals" icon from menu bar on the left
02. Select Hospital to view cases (Ability to Search by Hospital Name in search bar)
03. Select "Upcoming Cases"

## VIEW LIVE CASES AT HOSPITALS ASSIGNED TO REPRESENTATIVE

01. Select "Hospitals" icon from menu bar on the left
02. Select Hospital to view cases (Ability to Search by Hospital Name in search bar)
03. Select "Live Cases"



Hospitals



Search

## VIEW MANUFACTURER INSTRUMENTS

01. Select "Instruments" icon from menu bar on the left
02. Select "Manufacturer's Instruments"
03. Select Instrument you wish to view (Ability to Search by Instrument Name in Search Bar as well as ability to Search by Manufacturers by selecting drop down menu)

## VIEW MY INSTRUMENTS

01. Select "Instruments" icon from menu bar on the left
02. Select "My Instruments"
03. Select Instrument you wish to view (Ability to Search by Instrument Name in Search Baras well as ability to Search by Manufacturers by selecting drop down menu )



Instruments



Search

## ADD INSTRUMENTS

01. Select "Instruments" icon from menu bar on the left
02. Select "My Instruments"
03. Select "Add Instrument"
04. Enter Details ( Instrument Name, Description, Image, Video)
05. Select "Add Image"
  - a. Choose "Take photo" (take photo using ipad camera) and Select "Use Photo" or "Retake"

**OR**

  - b. Choose "Photo library" (search and select photo stored on ipad) and Select "Done"
06. Crop and edit selected photo
07. Select "Yellow Check Mark" in upper left corner upon completion or "Blue X" to cancel
08. Select "Add Video" (if a video is required)
  - a. Choose "Take video" (take video using ipad camera) and Select "Use Video" or "Retake"

**OR**

  - b. Choose "Video library" (search and select video stored on ipad) and Select "Done"
09. Select "Add" to save



Instruments

## EDIT/DELETE INSTRUMENTS

01. Select "Instruments" icon from menu bar on the left
02. Select "My Instruments"
03. Select Horizontal Menu icon on Instrument wish to edit/delete
  - a. **Delete**
    - i. Select "Delete"
    - ii. Instrument will be moved to Deleted Instrument
      1. Deleted Instrument can be viewed by Selecting Horizontal Menu icon next to Add Instrument button
        - a. Select "Deleted Instruments"
  - b. **Edit**
    - i. Select "Edit"
    - ii. Edit Details (Instrument Name, Description, Image/Video) as needed
    - iii. Select "Save"



Instruments



Horizontal Menu

## VIEW DELETED INSTRUMENTS

01. Select "Instruments" icon from menu bar on the left
02. Select "My Instruments"
03. Select Horizontal Menu icon top right corner
04. Select "Show Deleted Instruments"

## VIEW MANUFACTURER'S TRAYS

01. Select "Trays" icon from menu bar on the left
02. Select "Manufacturer's Trays"
03. Select Tray you wish to view (Ability to Search by Tray Name as well as ability to Search by Manufacturers by selecting drop down menu)

## VIEW MY TRAYS

01. Select "Trays" icon from menu bar on the left
02. Select "My Trays"
03. Select Tray you wish to view (Ability to Search by Tray Name as well as ability to Search by Manufacturers by selecting drop down menu)



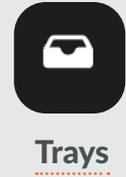
Trays



Search

## ADD TRAY

01. Select "**Trays**" icon from menu bar on the left
02. Select "My Trays"
03. Select "Add Tray"
04. Enter Tray Details ( Name, Description, Image)
05. Select "Tap to upload an image"
  - a. Choose "Take photo" (take photo using ipad camera) and Select "Use Photo"
  - OR**
  - b. Choose "Photo library" (search and select photo stored on ipad)
06. Crop and edit selected photo
07. Select "Yellow Check Mark" in upper left corner upon completion or "Blue X" to cancel
08. To add Instrument(s) to the tray, select "Search by Instrument" under "Add Instruments"
09. Search for and "Check" all Instrument(s) to add to tray
10. Select "Add" to save tray and Instrument(s)



## EDIT/DELETE TRAYS

01. Select "Trays" icon from menu bar on the left
02. Select Horizontal Menu icon on tray to Edit/Delete
  - a. Delete
    - i. Select "Delete"
    - ii. Tray will be moved to Deleted Trays
      1. Deleted Trays can be viewed by selecting Horizontal Menu icon next to "Add Tray"
        - a. Select "Show Deleted Trays"
  - b. Edit
    - i. Select "Edit"
    - ii. Edit Tray Details (Tray Name, Tray Description, Tray Image) as needed
    - iii. Add Instruments
      1. Select "Search by Instrument"
      2. Select "Instrument(s)" to be added (Ability to select multiple items)
    - iv. Select "Save"



Trays



Horizontal Menu

## VIEW DELETED TRAYS

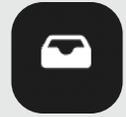
01. Select "Trays" icon from menu bar on the left
02. Select "My Trays"
03. Select Horizontal Menu icon top right corner
04. Select "Show Deleted Trays"

## VIEW MANUFACTURER'S PROCEDURES

01. Select "Procedures" icon from menu bar on the left
02. Select "Manufacturer's Procedures"
03. Select Procedure to view (Ability to Search by Procedure Name in search bar as well as ability to Search by Manufacturers by selecting drop down menu)

## VIEW MY PROCEDURES

01. Select "Procedures" icon from menu bar on the left
02. Select "My Procedures"
03. Select Procedure to view (Ability to Search by Procedure Name in search bar as well as ability to Search by Manufacturers by selecting drop down menu)



Trays



Horizontal Menu



Procedures



Search

## CREATE PROCEDURE BY CLONING MANUFACTURER PROCEDURES

01. Select "Procedures" icon from the menu bar on the left
02. Select "Manufacturer's Procedures"
03. Select Vertical Menu on manufacturer procedure you wish to clone
04. Select "Clone"
05. Enter Procedure Name (required) and Procedure Description (optional)
06. Click "Continue" to bring you to the "Table Setup" page
  - a. **Edit Table Set up**
    - i. *Choose appropriate table size (2 wide or 3 wide) by selecting table size selector box in upper right corner*
    - ii. *To remove trays*
      1. Select the "X" in upper right corner of appropriate tray
      2. Select "Save"
    - iii. *To move trays from one location to another*
      1. Touch and hold to drag and drop to appropriate location
      2. "Save"
    - iv. *To add trays*
      1. Select "Case Cart Management"
      2. Select "Add/Manage Trays"
      3. Select "Search by Tray Name" to enter tray name or scroll through list of trays
      4. Select the plus icon, "+" to add tray(s) (Note: Ability to select multiple trays)
      5. Select "Done" once all desired trays have been selected



Procedures



Vertical Menu

6. Select “Case Cart Management” button to see selected trays
7. Touch and hold on tray to drag and drop to desired location on Table Setup (Repeat for all trays)
8. Select “Save” when complete (Note: Individual trays can be viewed along with the tray’s assigned Instruments by selecting the tray)

**b. Edit the Surgical Flow**

- i. *Select “Surgical Flow”*
- ii. *Select “Edit” to Add/Delete/Change (Surgical Step, Checklist, Notes, and Phase)*
- iii. *Select desired option (Surgical Step, Checklist, Notes, and Phase) to Edit*
- iv. *Select “Plus” icon (+) to add desired option*
  1. Surgical Step
    - a. Enter Label
    - b. Enter Needed Instrument(s) (search by name and select all desired Instrument(s) (Note: Instruments are required to save step)
    - c. Enter Description & Notes (optional)
    - d. Upload Video from Library or take a video if applicable (click on video tab)
    - e. Select “Save”
  2. Checklist
    - a. Enter Label
    - b. Enter Items
    - c. Add Item (Repeat as necessary for all items desired for checklist)
    - d. Select “Save”
  3. Notes
    - a. Enter Step Label
    - b. Enter Notes & Description
    - c. Select “Save”
  4. Phase

- a. Enter phase label
  - b. Select "Save"
- 5. Change/move position of individual Surgical Step, Checklist, Notes, and Phase
  - a. Select and hold 6 dots to the right of the Surgical Step, Checklist, Note, or Phase
  - b. Move selection to new position and release
- c. Once Surgical flow is completed press "Done"

Once completed the new cloned procedure can be accessed in My Procedures

## CREATE PROCEDURES BY CLONING MY PROCEDURES

01. Select "Procedures" icon from the menu bar on the left
02. Select "My Procedures"
03. Select Vertical Menu on procedure you wish to clone
04. Select "Clone"
05. Enter Procedure Name (required) and Procedure Description (optional)
06. Click "Continue" to bring you to the "Table Setup" page
  - a. **Edit Table Set up**
    - i. *Choose appropriate table size (2 wide or 3 wide) by selecting table size selector box in upper right corner*
    - ii. *To remove trays*
      1. Select the "X" in upper right corner of appropriate tray
      2. Select "Save"
    - iii. *To move trays from one location to another*
      1. Touch and hold to drag and drop to appropriate location
      2. "Save"
    - iv. *To add trays*
      1. Select " Case Cart Management"
      2. Select "Add/Manage Trays"
      3. Select "Search by Tray Name" to enter tray name or scroll through list of trays
      4. Select the plus icon, "+" to add tray(s) (Note: Ability to select multiple trays)
      5. Select "Done" once all desired trays have been selected



Procedures



Vertical Menu

6. Select “Case Cart Management” button to see selected trays
7. Touch and hold on tray to drag and drop to desired location on Table Setup (Repeat for all trays)
8. Select “Save” when complete (Note: Individual trays can be viewed along with the tray’s assigned Instruments by selecting the tray)

**b. Edit the Surgical Flow**

- i. *Select “Surgical Flow”*
- ii. *Select “Edit” to Add/Delete/Change (Surgical Step, Checklist, Notes, and Phase)*
- iii. *Select desired option (Surgical Step, Checklist, Notes, and Phase) to Edit*
- iv. *Select “Plus” icon (+) to add desired option*
  1. Surgical Step
    - a. Enter Label
    - b. Enter Needed Instrument(s) (search by name and select all desired Instrument(s) (Note: Instruments are required to save step)
    - c. Enter Description & Notes (optional)
    - d. Upload Video from Library or take a video if applicable (click on video tab)
    - e. Select “Save”
  2. Checklist
    - a. Enter Label
    - b. Enter Items
    - c. Add Item (Repeat as necessary for all items desired for checklist)
    - d. Select “Save”
  3. Notes
    - a. Enter Step Label
    - b. Enter Notes & Description
    - c. Select “Save”
  4. Phase

- a. Enter phase label
  - b. Select "Save"
- 5. Change/move position of individual Surgical Step, Checklist, Notes, and Phase
  - a. Select and hold 6 dots to the right of the Surgical Step, Checklist, Note, or Phase
  - b. Move selection to new position and release
- c. Once Surgical flow is completed press "Done"

Once completed the new cloned procedure can be accessed in My Procedures

## CREATE PROCEDURES FROM SCRATCH

01. Select "**Procedures**" icon from the menu bar on the left
02. Select "My Procedures"
03. Select "Create Procedure"
04. Enter Procedure Name (required) and Procedure Description (optional)
05. Click "Create" to bring you to the "Table Setup" page
  - a. **Table Setup**
    - i. Choose appropriate table size (2 wide or 3 wide) by selecting table size selector box in upper right corner
    - ii. Select "Case Cart Management"
    - iii. Select "Manage Trays"
    - iv. Select "Search by Tray Name" to enter tray name or scroll through list of trays
    - v. Select the plus icon, "+" to add tray(s) (Note: Ability to select multiple trays)
    - vi. Select "Done" once all desired trays have been selected
    - vii. Select "Case Cart Management" button to see selected trays
    - viii. Press and hold on tray to drag and drop to desired location on Table Setup (Repeat for all trays)
    - ix. Select "Save" when complete (Note: Individual trays can be viewed along with the tray's assigned instruments by selecting the tray)
  - b. **Surgical Flow**
    - i. Select on "Surgical Flow" tab
    - ii. Select "Edit"
    - iii. Select "Plus" (+) button



**Procedures**

- iv. *Select desired option (Surgical Step, Checklist, Notes, and Phase)*
  - 1. Surgical Step
    - a. Enter Label
    - b. Enter Needed Instruments (search by name and select all desired Instruments) (Note: Instruments are required to save step)
    - c. Enter Description & Notes (optional)
    - d. Upload or take a video if applicable (click on video tab)
    - e. Select "Save"
  - 2. Checklist
    - a. Enter Label
    - b. Enter Items
    - c. Add Item (Repeat as necessary for all items desired for checklist)
    - d. Select "Save"
  - 3. Notes
    - a. Enter Step Label
    - b. Enter Notes & Description
    - c. Select "Save"
  - 4. Phase
    - a. Enter phase label
    - b. Select "Save"
- c. Once Surgical flow is completed press "Done"

Once completed the new procedure can be accessed in My Procedures

## EDIT/DELETE PROCEDURES

01. Select "**Procedures**" icon from menu bar on the left
02. Select "My Procedures"
03. Select **Vertical Menu** on procedure you wish to Edit/Delete
  - a. **Delete**
    - i. *Type Procedure Name to Confirm Delete*
    - ii. *Select "Delete"*
  - b. **Edit**
    - i. *Edit Table Set up*
      1. Choose appropriate table size (2 wide or 3 wide) by selecting table size selector box in upper right corner
      2. To remove trays
        - a. Select the "X" in upper right corner of appropriate tray
        - b. Select "Save"
      3. To move trays from one location to another
        - a. Touch and hold to drag and drop to appropriate location
        - b. Select "Save"
      4. To add trays
        - a. Select "Case Cart Management"
        - b. Select "Add/Manage Trays"
        - c. Select "Search by Tray Name" to enter tray name or scroll through list of trays
        - d. Select the plus icon, "+" to add tray(s) (Note: Ability to select multiple trays)
        - e. Select "Done" once all desired trays have been selected



**Procedures**



**Vertical Menu**

- f. Select “Case Cart Management” button to see selected trays
  - g. Touch and hold on tray to drag and drop to desired location on Table Setup (Repeat for all trays)
  - h. Select “Save” when complete (Note: Individual trays can be viewed along with the tray’s assigned Instruments by selecting the tray)
- ii. *Edit the Surgical Flow*
1. To Add/Delete/Change (Surgical Step, Checklist, Notes, and Phase)
  2. Select “Edit”
  3. Select desired option (Surgical Step, Checklist, Notes, and Phase) to Edit
  4. Select “Plus” icon (+) to add desired option
    - a. **Surgical Step**
      - i. *Enter Label*
      - ii. *Enter Needed Instrument(s) (search by name and select all desired Instrument(s) (Note: Instruments are required to save step)*
      - iii. *Enter Description & Notes (optional)*
      - iv. *Upload or take a video if applicable (click on video tab)*
      - v. *Select “Save”*
    - b. **Checklist**
      - i. *Enter Label*
      - ii. *Enter Items*
      - iii. *Add Item (Repeat as necessary for all items desired for checklist)*
      - iv. *Select “Save”*
    - c. **Notes**
      - i. *Enter Step Label*
      - ii. *Enter Notes & Description*
      - iii. *Select “Save”*
    - d. **Phase**
      - i. *Enter phase label*



## VIEW DELETED PROCEDURES

01. Select "Procedures" icon from menu bar on the left
02. Select "My Procedures"
03. Select Horizontal Menu icon top right corner
04. Select "Show Deleted Procedures"



Procedures



Horizontal Menu



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