

APP USER GUIDE

EVOLVING OPERATING ROOM EFFICIENCY

DINAMIC **OR⁺**



MANUFACTURERS

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MANUFACTURER ADMIN

MANUFACTURER SETUP

01. Select "Manufacturer Setup" icon from menu bar on the left
02. Select "Edit" top right corner
03. Edit Basic Details as needed
04. Select "Save"

ADDING ADMIN TO MANUFACTURER

01. Select "Manufacturer Users" icon from menu bar on the left
02. Select "Add User" top right corner
03. Enter details
04. Assign "Role" as "Manufacturer Admin" select "Done"
05. Select "Add" to save information

Upcoming Cases - Cases that have been scheduled

Live Cases - Cases currently being conducted

PLEASE NOTE:
Manufacturer's Global Hospital List will be assigned by the DinamicOR Super Admin



Manufacturer Setup



Manufacturer Users

EDITING/DELETING/RESENDING INVITE TO MANUFACTURER USERS

01. Select "Manufacturers 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"



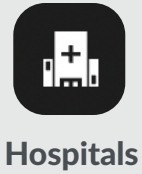
Manufacturer Users



Horizontal Menu

VIEW HOSPITALS ASSIGNED TO MANUFACTURER

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



VIEW UPCOMING CASES AT HOSPITALS ASSIGNED TO MANUFACTURER

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 MANUFACTURER

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"

VIEW INSTRUMENTS

01. Select "**Instruments**" icon from menu bar on the left
02. Select Instrument you wish to view (Ability to **Search** by Instrument Name in Search Bar)

ADD INSTRUMENTS

01. Select "**Instruments**" icon from menu bar on the left
02. Select "Add Instrument"
03. Enter Details (Instrument Name, Description, Image, Video)
04. Select "Add Image"
 - a. Option 1- Choose "Take photo" (take photo using ipad camera) and Select "Use Photo" or "Retake"
 - b. Option 2- Choose "Photo library" (search and select photo stored on ipad) and Select "Done"
05. Crop and edit selected photo
06. Select "Yellow Check Mark" in upper left corner upon completion or "Blue X" to cancel
07. Select "Add Video" (if a video is required)
 - a. Option 1- Choose "Take video" (take video using ipad camera) and Select "Use Video" or "Retake"
 - b. Option 2- Choose "Video library" (search and select video stored on ipad) and Select "Done"
08. Select "Add" to save



Instruments



Search

EDIT/DELETE INSTRUMENTS

01. Select "Instruments" icon from menu bar on the left
02. Select Horizontal Menu icon on Instrument wish to edit/delete
03. Delete
 - a. Select "Delete"
 - i. *Instrument will be moved to Deleted Instrument*
 - ii. *Deleted Instrument can be viewed by Selecting Horizontal Menu icon next to Add Instrument button*
 - iii. *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 Horizontal Menu icon top right corner
03. Select "Show Deleted Instruments"

VIEW TRAYS

01. Select "Trays" icon from menu bar on the left
02. Select Tray you wish to view (Ability to Search by Tray Name in Search Bar)



Instruments



Horizontal Menu



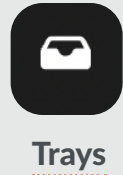
Trays



Search

ADD TRAY

01. Select **Trays** icon from menu bar on the left
02. Select "Add Tray"
03. Enter Tray Details (Name, Description, Image)
04. Select "Tap to upload an image"
 - a. Option 1- Choose "Take photo" (take photo using ipad camera) and Select "Use Photo" or "Retake"
 - b. Option 2- Choose "Photo library" (search and select photo stored on ipad) and Select "Done"
05. Crop and edit selected photo
06. Select "Yellow Check Mark" in upper left corner upon completion or "Blue X" to cancel
07. To add Instrument(s) to the tray, select "Search by Instrument" under "Add Instruments"
08. Search for and "Check" all Instrument(s) to add to tray
09. 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
 - iii. Deleted Trays can be viewed by selecting Horizontal Menu icon next to "Add Tray"
 1. Select " Show Deleted Trays"
 - b. Edit
 - i. Select "Edit"
 - ii. Edit Details (Tray Name, Tray Description, Tray Image) as needed
 - iii. Add Instruments
 - iv. Select "Search by Instrument"
 - v. Select "Instrument(s)" to be added (Ability to select multiple Instruments)
 - vi. Select "Save"



Trays



Horizontal Menu

VIEW DELETED TRAYS

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

VIEW MFC PROCEDURES

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



Trays



Horizontal Menu



Procedures



Search

CREATE PROCEDURES

01. Select "**Procedures**" icon from the menu bar on the left
02. Select "Create Procedure"
03. Enter Procedure Name (required) and Procedure Description (optional)
04. 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 "Create"
 - iii. Select "Plus" (+) button
 - iv. Select desired option (Surgical Step, Checklist, Notes, and Phase)



Procedures

1. Surgical Step
 - a. Enter Label (Required)
 - 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 from Video 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"
- c. Once Surgical flow is completed press "Done"

CLONE MANUFACTURER'S PROCEDURES:

01. Select "Procedures" icon from the menu bar on the left
02. Select Vertical Menu on Procedure you wish to clone
03. Select "Clone"
04. Enter Procedure Name (required) and Procedure Description (optional)
05. 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
 6. Select "Case Cart Management" button to see selected trays



Procedures



Vertical Menu

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

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DELETE/EDIT PROCEDURES:

01. Select "**Procedures**" icon from menu bar on the left
02. Select **Vertical Menu** on procedure you wish to Delete/Edit
 - a. **Delete**
 - i. Select "Delete"
 - ii. Type Procedure Name to Confirm Delete
 - iii. Select "Delete"
 - b. **Edit**
 - i. Select "Edit"
 - ii. 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. "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)



Procedures



Vertical Menu

- e. Select “Done” once all desired trays have been selected
- 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)

iii. *Edit the Surgical Flow*

- 1. Select “Surgical Flow”
- 2. Select “Edit” to Add/Delete/Change (Surgical Step, Checklist, Notes, and Phase)
- 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 Video from Library 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
 - ii. Select "Save"
 - e. **Change/move position of individual Surgical Step, Checklist, Notes, and Phase**
 - i. Select and hold 6 dots to the right of the Surgical Step, Checklist, Note, or Phase
 - ii. Move selection to new position and release
- iv. Once Surgical flow is completed press "Done"

VIEW DELETED PROCEDURES

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



Procedures



Horizontal Menu



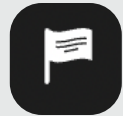
Areas

ADDING AREAS TO MANUFACTURER

01. Select "Areas" icon from menu bar on the left
02. Select "Add Area" top right corner
03. Enter Details
04. Assign Hospitals to Area
 - a. Select "Search by Hospital Name" under "Assigned Hospitals"
 - b. Select Hospital(s) you wish to assign (Ability to select multiple hospitals)
05. Select "Add" to save information

ADDING REGIONAL MANAGERS TO AREAS

01. Select "Areas" icon from menu bar on the left
02. Select "Area" you wish to add Regional Manager
03. Select "Regional Managers" icon from menu bar on the left
04. Select "Add Regional Manager" top right corner
05. Enter Details
06. Assign Hospitals to Regional Manager
 - a. Select "Search by Hospital Name" under "Assigned Hospitals"
 - b. Select Hospital(s) you wish to assign (Ability to select multiple hospitals)
07. Select "Add" to save information



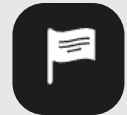
Areas



Regional Managers

ADDING MEDICAL REPRESENTATIVES TO REGIONAL MANAGERS

01. Select "**Areas**" icon from menu bar on the left
02. Select "Area" that contains the Regional Manager you wish to add Medical Representative under
03. Select "**Regional Managers**" icon from menu bar on the left
04. Select "Regional Manager" that you wish to add Medical Representative under
05. Select "**Medical Representatives**" icon from menu bar on the left
06. Select "Add Mep Rep" top right corner
07. Enter Details
08. Assign Hospitals to Medical Representative
 - a. Select "Search by Hospital Name" under "Assigned Hospitals"
 - b. Select Hospital(s) you wish to assign (Ability to select multiple hospitals)
09. Select "Add" to save information



Areas



Regional Managers



Medical Representatives

MANUFACTURER AREA MANAGER

ADDING AREA MANAGER

01. Select "Area Users" icon from menu bar on left
02. Select "Add User" top right corner
03. Enter Details
04. Select "Add" to save information



Area Users

Upcoming Cases - Cases that have been scheduled

Live Cases - Cases currently being conducted

PLEASE NOTE: Area Manager's Hospital List will be assigned by the either the Manufacturer Admin or DinamicOR Super Admin

EDITING/DELETING/RESENDING INVITE TO MANUFACTURER USERS

01. Select "Area 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"



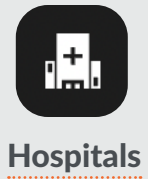
Area Users



Horizontal Menu

VIEW HOSPITALS ASSIGNED TO AREA MANAGER

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



VIEW UPCOMING CASES AT HOSPITALS ASSIGNED TO AREA MANAGER

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

VIEW LIVE CASES AT HOSPITALS ASSIGNED TO AREA MANAGER

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"

VIEW INSTRUMENTS

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



Instruments

VIEW DELETED INSTRUMENTS

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



Search



Horizontal Menu

VIEW TRAYS

01. Select "Trays" icon from menu bar on the left
02. Select Tray you wish to view (Ability to search by Tray Name)



Trays

VIEW DELETED TRAYS

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

VIEW MANUFACTURER'S PROCEDURES

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

VIEW DELETED MANUFACTURER'S PROCEDURES

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



Trays



Procedures



Search



Horizontal Menu

ADDING REGIONAL MANAGERS TO AREAS

01. Select "Regional Managers" icon from menu bar on the left
02. Select "Add Regional Manager" top right corner
03. Enter Details
04. Assign Hospitals to Regional Manager
 - a. Select "Search by Hospital Name" under "Assigned Hospitals"
 - b. Select Hospital(s) you wish to assign (Ability to select multiple hospitals)
05. Select "Add" to save information



Regional Managers

ADDING MEDICAL REPRESENTATIVES TO REGIONAL MANAGERS

01. Select "Regional Managers" icon from menu bar on the left
02. Select "Regional Manager" that you wish to add Medical Representative under
03. Select "Medical Representatives" icon from menu bar on the left
04. Select "Add Mep Rep" top right corner
05. Enter Details
06. Assign Hospitals to Medical Representative
 - a. Select "Search by Hospital Name" under "Assigned Hospitals"
 - b. Select Hospital(s) you wish to assign (Ability to select multiple hospitals)
07. Select "Add" to save information



Regional Managers



Medical Representatives

MANUFACTURER REGIONAL MANAGER

VIEW HOSPITALS ASSIGNED TO REGIONAL MANAGER

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

VIEW UPCOMING CASES AT HOSPITALS ASSIGNED TO REGIONAL MANAGER

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"

Upcoming Cases - Cases that have been scheduled

Live Cases - Cases currently being conducted

Manufacturer Procedures - manufacturer created surgical templates

Regional Manager's Procedures - custom surgical templates created by regional managers and medical representatives for their hospitals and surgeons

Manufacturer Trays - manufacturer created trays

Regional Manager's Trays - custom trays created by regional managers and medical representatives for their hospitals and surgeons

Manufacturer Instruments - manufacturer created instruments

Regional Manager's Instruments - custom instruments created by regional managers and medical representatives for their hospitals and surgeons

PLEASE NOTE: Regional Manager's Hospital List will be assigned by the Manufacturer Admin, Area Manager Admin or DinamicOR Super Admin

VIEW LIVE CASES AT HOSPITALS ASSIGNED TO REGIONAL MANAGER

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"

VIEW MANUFACTURER'S INSTRUMENTS

(Manufacturer created 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)



Hospitals



Instruments



Search

VIEW DELETED MANUFACTURER'S INSTRUMENTS

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

VIEW MY INSTRUMENTS

(Custom Instruments created by you for your hospitals and surgeons)

01. Select "Instrument" 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 Bar)



Instruments



Horizontal Menu



Search

ADD MY 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. Option 1- Choose "Take photo" (take photo using ipad camera) and Select "Use Photo" or "Retake"
 - b. Option 2- 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. Option 1- Choose "Take video" (take video using ipad camera) and Select "Use Video" or "Retake"
 - b. Option 2- Choose "Video library" (search and select video stored on ipad) and Select "Done"
09. Select "Add" to save



Instruments

EDIT/DELETE MY 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
 - iii. Deleted Instrument can be viewed by Selecting Horizontal Menu icon next to Add Instrument button
 - iv. 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 MY 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

(Manufacturer created 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)



Instruments



Horizontal Menu



Trays



Search

VIEW DELETED MANUFACTURER'S TRAYS

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

VIEW MY TRAYS

(Custom Trays created by you for your hospitals and surgeons)

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)



Trays



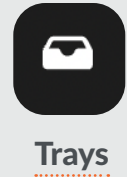
Horizontal Menu



Search

ADD MY TRAYS

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. **Option 1- Choose "Take photo" (take photo using ipad camera) and Select "Use Photo" or "Retake"**
 - b. **Option 2- 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. 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 MY 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
 - iii. Deleted Trays can be viewed by selecting Horizontal Menu icon next to "Add Tray"
 1. Select " Show Deleted Trays"
 - b. Edit
 - i. Select "Edit"
 - ii. Edit Details (Tray Name, Tray Description, Tray Image) as needed
 - iii. Add Instruments
 - iv. Select "Search by Instrument"
 - v. Select "Instrument(s)" to be added (Ability to select multiple instruments)
 - vi. Select "Save"



Trays



Horizontal Menu

VIEW DELETED MY 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

(Manufacturer created surgical templates)

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)



Trays



Horizontal Menu



Procedures



Search

VIEW DELETED MANUFACTURER'S PROCEDURES

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

VIEW MY PROCEDURES

(Custom created surgical templates created by you for your hospitals and surgeons)

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)



Procedures



Horizontal Menu



Search

VIEW DELETED MY 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

CREATE PROCEDURES BY CLONING MANUFACTURER'S 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"
07. Once completed the new Cloned Procedure can be found under My Procedures Tab

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 My 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 found under My Procedures Tab

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
06. Table Setup
 - a. Choose appropriate table size (2 wide or 3 wide) by selecting table size selector box in upper right corner
 - b. Select "Case Cart Management"
 - c. Select "Manage Trays"
 - d. Select "Search by Tray Name" to enter tray name or scroll through list of trays
 - e. Select the plus icon, "+" to add tray(s) (Note: Ability to select multiple trays)
 - f. Select "Done" once all desired trays have been selected
 - g. Select "Case Cart Management" button to see selected trays
 - h. Press and hold on tray to drag and drop to desired location on Table Setup (Repeat for all trays)
 - i. Select "Save" when complete (Note: Individual trays can be viewed along with the tray's assigned instruments by selecting the tray)
07. Surgical Flow:
 - a. Select on "Surgical Flow" tab



Procedures

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

08. Once Surgical flow is completed press “Done”

Once completed the new procedure can be found under the Regional Manager’s Procedures tab.

EDIT MY PROCEDURES

01. Select "**Procedures**" icon from the menu bar on the left
02. Select " My Procedures"
03. Select **Vertical Menu** next to procedure you wish to edit
04. Select "Edit" 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
 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)



Procedures



Vertical Menu

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”

VIEWING ASSIGNED MEDICAL REPRESENTATIVES

01. Select "Medical Representatives" icon from menu bar on the left
02. Select the Medical Representative to view



Medical Representatives

ADDING MEDICAL REPRESENTATIVES TO REGIONAL MANAGERS

01. Select "Medical Representatives" icon from menu bar on the left
02. Select "Add Mep Rep" top right corner
03. Enter Details
04. Assign Hospitals to Medical Representative
 - a. Select "Search by Hospital Name" and enter hospital name
 - b. Select Hospital(s) you wish to assign
05. Select "Add" to save information

MANUFACTURER MEDICAL REPRESENTATIVE

VIEW HOSPITALS ASSIGNED TO MEDICAL REPRESENTATIVE

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

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"

Upcoming Cases - Cases that have been scheduled

Live Cases - Cases currently being conducted

Manufacturer Procedures - manufacturer created surgical templates

Regional Manager's Procedures - custom surgical templates created by regional managers and medical representatives for their hospitals and surgeons

Manufacturer Trays - manufacturer created trays

Regional Manager's Trays - custom trays created by regional managers and medical representatives for their hospitals and surgeons

Manufacturer Instruments - manufacturer created instruments

Regional Manager's Instruments - custom instruments created by regional managers and medical representatives for their hospitals and surgeons

PLEASE NOTE: Manufacturer Medical Representative Hospital List will be assigned by the Manufacturer Admin, Area Manager Admin, Regional Manager Admin or DinamicOR Super Admin

VIEW LIVE 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 "Live Cases"

VIEW MANUFACTURER INSTRUMENTS

(Manufacturer created Instruments)

01. Select "Instrument" 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)



Hospitals



Instruments



Search

VIEW DELETED MANUFACTURER INSTRUMENTS

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

VIEW REGIONAL MANAGER INSTRUMENTS

(Custom Instruments created by Regional Manager and you for your hospitals and surgeons)

01. Select "Instrument" icon from menu bar on the left
02. Select "Regional Manager's Instruments"
03. Select Instrument you wish to view (Ability to Search by Instrument Name in Search Bar)



Instruments



Horizontal Menu



Search

ADD INSTRUMENTS

01. Select "Instruments" icon from menu bar on the left
02. Select "Regional Manager's Instruments"
03. Select "Add Instrument"
04. Enter Details (Instrument Name, Description, Image, Video)
05. Select "Add Image"
 - a. Option 1- Choose "Take photo" (take photo using ipad camera) and Select "Use Photo" or "Retake"
 - b. Option 2- 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. Option 1- Choose "Take video" (take video using ipad camera) and Select "Use Video" or "Retake"
 - b. Option 2- Choose "Video library" (search and select video stored on ipad) and Select "Done"
09. Select "Add" to save



Instruments

EDIT/DELETE REGIONAL MANAGER'S INSTRUMENTS

01. Select "Instruments" icon from menu bar on the left
02. Select "Regional Manager's 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
 - iii. Deleted Instrument can be viewed by Selecting Horizontal Menu icon next to Add Instrument button
 1. 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 REGIONAL MANAGER'S INSTRUMENTS:

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

VIEW MANUFACTURER TRAYS: (MANUFACTURER CREATED TRAYS)

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



Instruments



Horizontal Menu



Trays



Search

VIEW DELETED MANUFACTURER TRAYS

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

VIEW REGIONAL MANAGER'S TRAYS

(Custom Trays created by Regional Manager and you for your hospitals and surgeons)

01. Select "Trays" icon from menu bar on the left
02. Select "Regional Manager's Trays"
03. Select Tray you wish to view (Ability to Search by Tray Name)



Trays



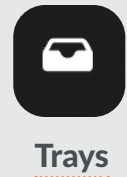
Horizontal Menu



Search

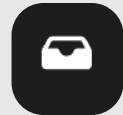
ADD REGIONAL MANAGER'S TRAYS

01. Select "Trays" icon from menu bar on the left
02. Select "Regional Manager's Trays"
03. Select "Add Tray"
04. Enter Tray Details (Name, Description, Image)
05. Select "Tap to upload an image"
 - a. Option 1- Choose "Take photo" (take photo using ipad camera) and Select "Use Photo"
 - b. Option 2- 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 REGIONAL MANAGER'S TRAYS

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



Trays



Horizontal Menu

VIEW DELETED REGIONAL MANAGER'S TRAYS

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

VIEW MANUFACTURER PROCEDURES

(Manufacturer created surgical templates)

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)



Trays



Horizontal Menu



Procedures



Search

VIEW DELETED MANUFACTURER PROCEDURES

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

VIEW REGIONAL MANAGER'S PROCEDURES

(Custom created surgical templates created by Regional Manager and you for your hospitals and surgeons)

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



Procedures



Horizontal Menu



Search

VIEW DELETED REGIONAL MANAGER'S PROCEDURES

01. Select "**Procedures**" icon from menu bar on the left
02. Select "Regional Manager's Procedures"
03. Select **Horizontal Menu** icon top right corner
04. Select "Show Deleted Procedures"



Procedures



Horizontal Menu

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 found under Regional Manager's Procedures Tab

CREATE PROCEDURES BY CLONING REGIONAL MANAGER'S PROCEDURES

01. Select "**Procedures**" icon from the menu bar on the left
02. Select "Regional Manager's Procedures"
03. Select **Vertical Menu** on Regional Manager's 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 found under My Procedures Tab

CREATE PROCEDURES FROM SCRATCH:

01. Select "**Procedures**" icon from the menu bar on the left
02. Select "Regional Manager 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
06. Table Setup
 - a. Choose appropriate table size (2 wide or 3 wide) by selecting table size selector box in upper right corner
 - b. Select "Case Cart Management"
 - c. Select "Manage Trays"
 - d. Select "Search by Tray Name" to enter tray name or scroll through list of trays
 - e. Select the plus icon, "+" to add tray(s) (Note: Ability to select multiple trays)
 - f. Select "Done" once all desired trays have been selected
 - g. Select "Case Cart Management" button to see selected trays
 - h. Press and hold on tray to drag and drop to desired location on Table Setup (Repeat for all trays)
 - i. Select "Save" when complete (Note: Individual trays can be viewed along with the tray's assigned instruments by selecting the tray)
07. Surgical Flow:
 - a. Select on "Surgical Flow" tab
 - b. Select "Edit"



Procedures

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

Once completed the new procedure can be found under My Procedures tab.

EDIT REGIONAL MANAGER'S PROCEDURES

01. Select "**Procedures**" icon from the menu bar on the left
02. Select "Regional Manager Procedures"
03. Select **Vertical Menu** next to procedure you wish to edit
04. Select "Edit" 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
 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)



Procedures



Vertical Menu

8. Select "Save" when complete (Note: Individual trays can be viewed along with the tray's assigned Instruments by selecting the tray)

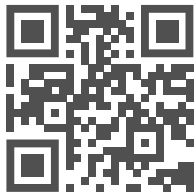
b. Edit the Surgical Flow

- 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"



Our mission is to standardize operating room organization with an ergonomic and intuitive Workflow Management System – improving the efficiency and reproducibility of surgical processes which will enable perioperative staff to focus on providing thoughtful patient care.



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