

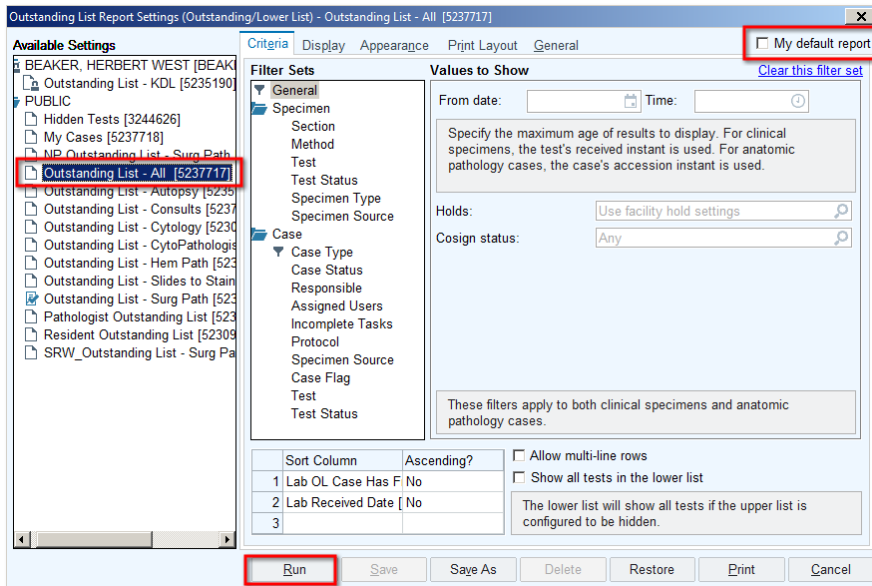
Personalization for Beaker AP Guide:

Setting the default views:

When you first log in to your account, you will have to set the default views for different activities.

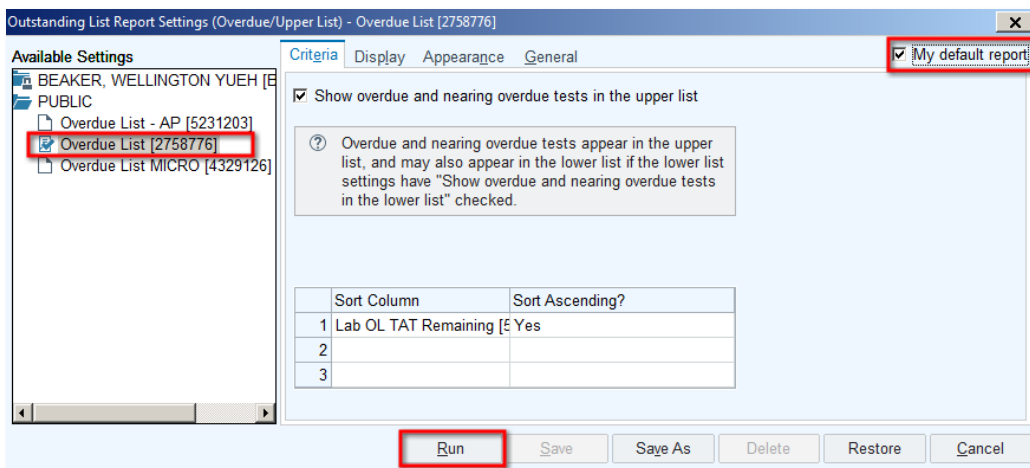
Outstanding List View:

The first one it will prompt you for is for the Outstanding List view. Choose the “**Outstanding List – All**” view in the list if you want your default to show ALL open cases or you can pick “**Outstanding List – <Department>**” to show a specific department’s open cases. After you select your choice, check off the **My default report** checkbox in top right corner. Click the **Run** button.



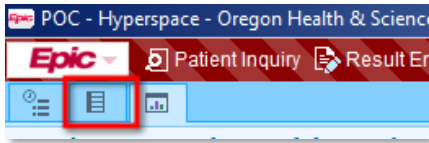
Outstanding List –Overdue/Upper List View:

It will immediately ask you which Overdue view you would like to open. Choose the **Overdue List [2758776]** and check off the **My default report** checkbox in top right corner. Click the **Run** button.

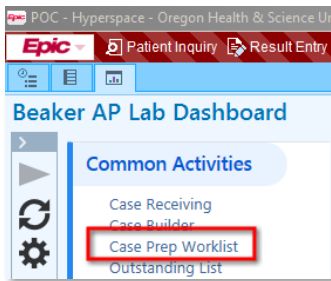


Case Prep Work List:

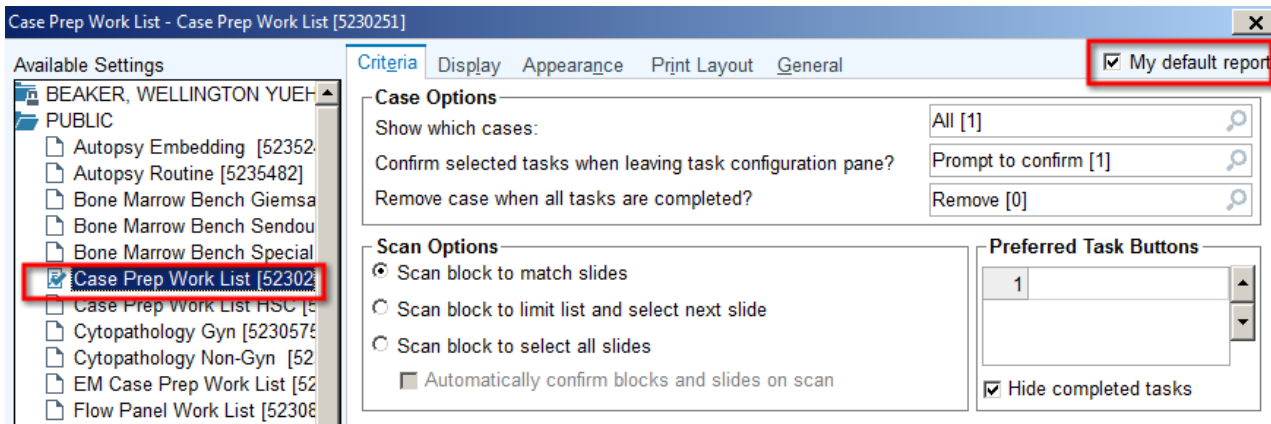
To set your default view for the **Case Prep Work List** activity, either click on the Case Prep Work List tab at the top left of your screen:



You can also click on the **Case Prep Work List** link from the **Beaker AP Lab Dashboard**.

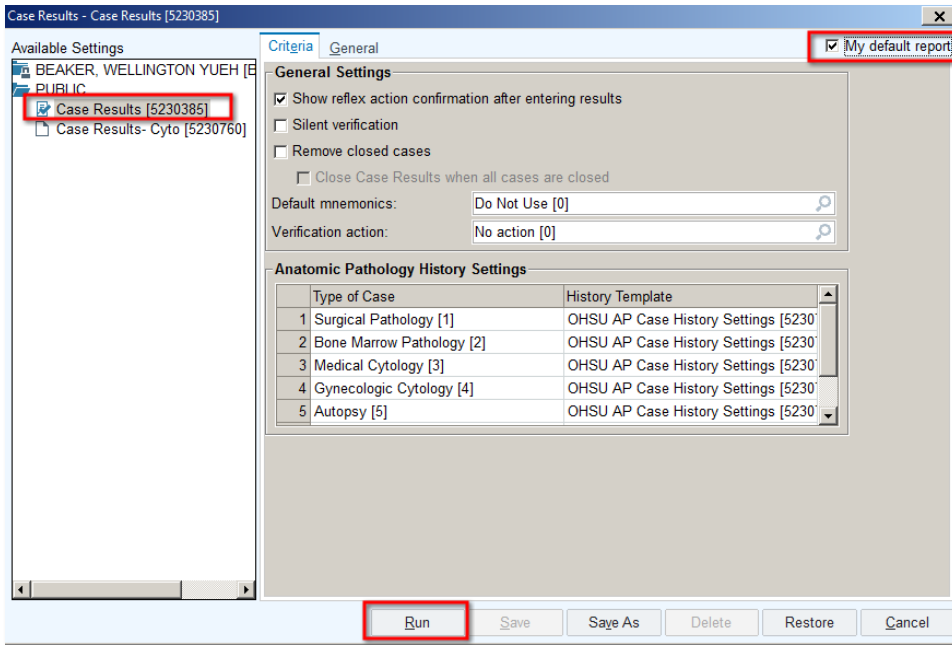


The following window should come up the first time you enter **Case Prep Work List**. Choose “**Case Prep Work List [5230251]**” and check off the **My default report** checkbox in top right corner. This view will show you all of the cases in the Case Prep Work List. If you want your default to be more specific, then choose the selection that is appropriate for your role. Click the **Accept** button when you have selected your default.



Case Results:

To set your default view for **Case Results**, click on the link from the **Beaker AP Lab Dashboard**. The following window will appear. Click on **“Case Results [5230385]”** and check off the **My default report** checkbox in top right corner. Click the **Run** button.



Other views:

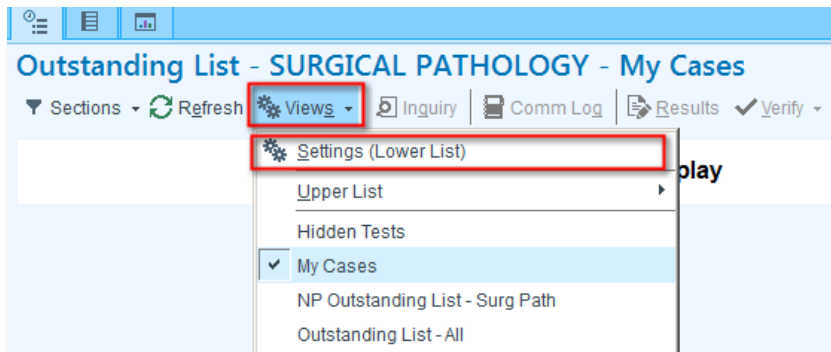
There are several other views that you may need to choose as you explore the system. Here are some default choices you may need to make:


Activity/Report:	Suggested default view:
Case Receiving	OHSU All Cases to be Received [5230249]
Case Linking → Specimen Search Window	Specimen Search [2759712]
Case Search	Case Search [5230252]
Follow-up Work List:	All Follow Up [2759710] or specific worklist your department will use most often.
Order Inquiry	Specimen Collection [5235683]
Packing List → Expand button.	Packing List Creation [2759704]
Requisition Entry → Expand button = Requisition Search window	Requisition Entry [2760282]
Sendout Bench	OHSU Inter-Lab Transfers [2762650] OR OHSU Inter-Lab Transfers Cytology to PTRL [5230894]
Specimen Inquiry –when you click on a patient	Specimen Inquiry [2759364]
Tracking	Specimen Tracking [3449974]

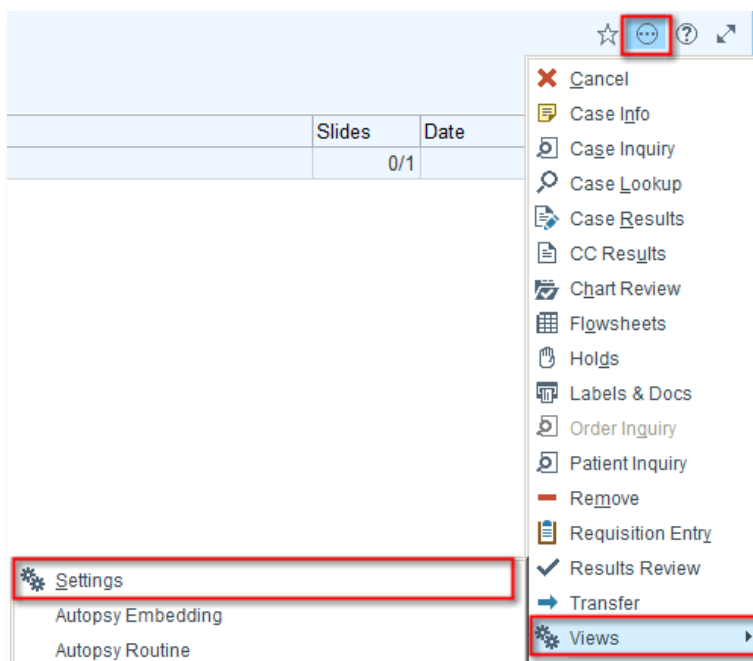
Changing Views or Reset your Default view:

There are two places in which you can change your current report view or set your default to another report view.

- If the current activity toolbar has a **Views** button, click on  **Views** button and select **Settings**.



- If there is no **Views** button in the current activity toolbar, then click on the  **Actions** button at the top right of the window and choose **Views** and select **Settings**.

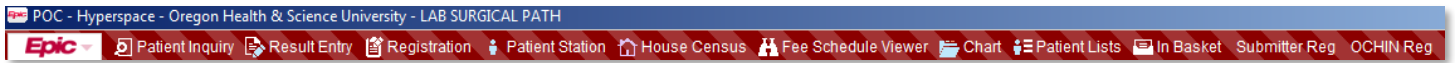



Both of these choices will bring up the report view window and you can select another view. You can also select a view and click on the **My default report** checkbox in top right corner to designate a new default.

Personalizing the Activity Button Bars:

Main Button Toolbar:

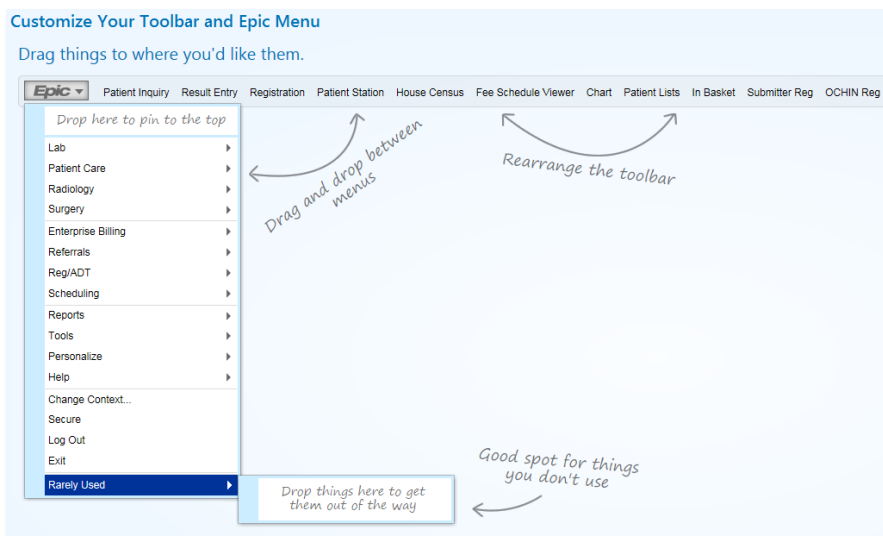
You can customize what buttons show on your main button bar in Beaker. This is the default buttons when you first log into Beaker:



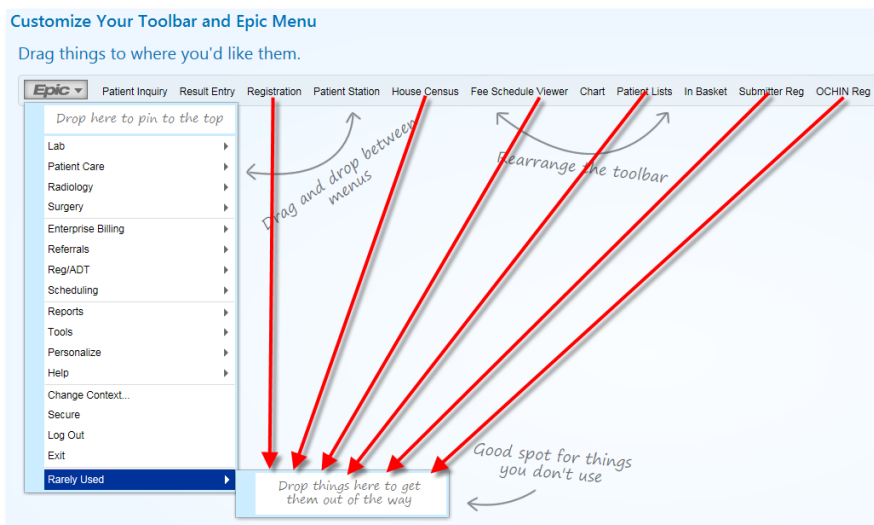
1. To customize the buttons on the main button toolbar, click on the  icon on the main toolbar.



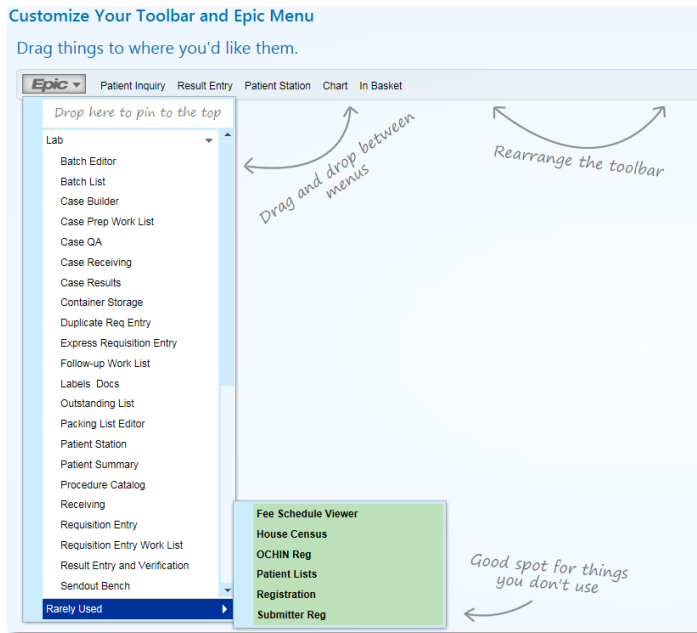
2. This will bring up the “Customize Your Toolbar and Epic Menu” window.



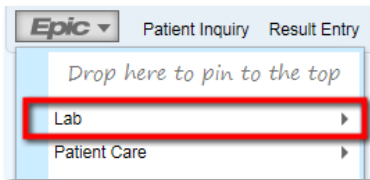
3. Remove the buttons that you may infrequently use. Recommended buttons to remove are: Registration, House Census, Fee Schedule Viewer, Patient Lists, Submitter Reg and OHIN Reg. Drag those buttons to the “Drop things here to get them out of the way” box.



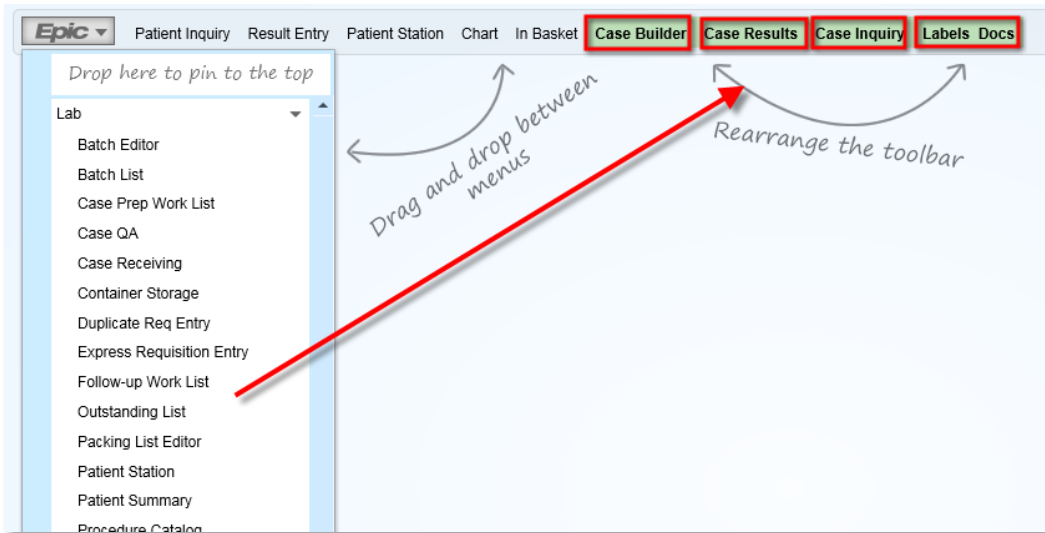
- After you drag the buttons to that box, those activities will be located in the Rarely Used list.




- To add buttons, find the activities you want to use and drag them to the top toolbar. Click on the **Lab** arrow to expand the list of Lab activities.



- Drag the activities you want to the toolbar. Some recommendations include **Case Builder**, **Case Results** and **Labels Docs**. Under the **Lab Reports** category, you can also add **Case Inquiry**. When you are done adding buttons, click on the **Accept** button.

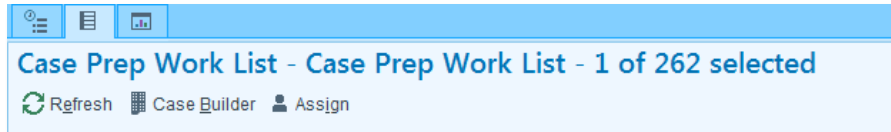


- Your main button bar should now display your changes. You can click on the  wrench icon to change it again later if you want to further customize the button bar.

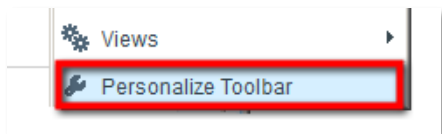


Customizing the Case Prep Work List:

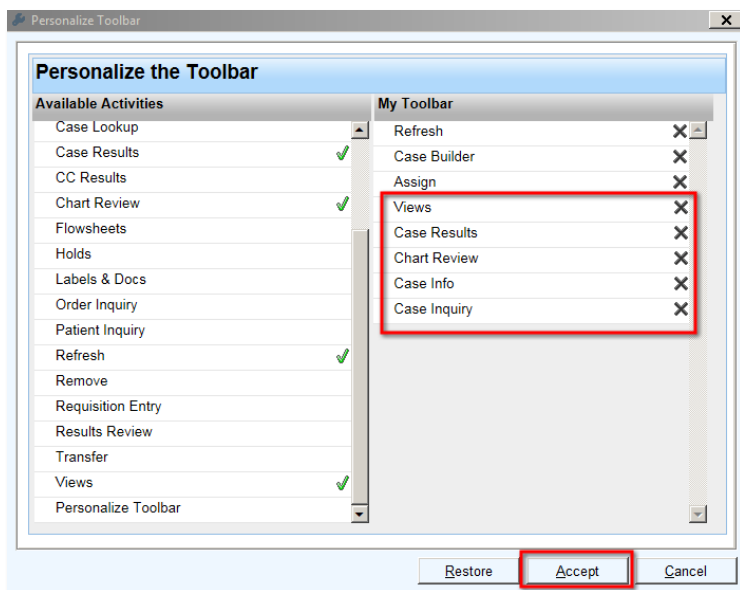
1. Open up the **Case Prep Work List** from the 2nd tab of your startup activities or from the **Case Prep Work List** from the **Beaker AP Lab Dashboard**. The following buttons are default.



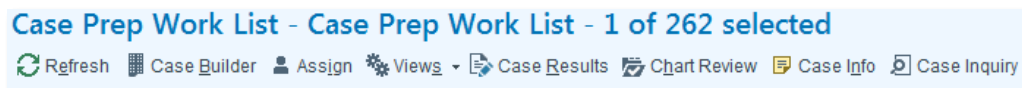
2. Click on the **Actions** button at the top right of the window and choose **Personalize Toolbar** at the bottom.



3. Drag the activities on the left side of the screen to right side column. When you are done adding buttons, click on the **Accept** button. Some recommended buttons include Views, Case Results, Chart Review, Case Info, Case Inquiry. You can also remove buttons by clicking on the **X** button on the right side column. Click the **Accept** button when done.

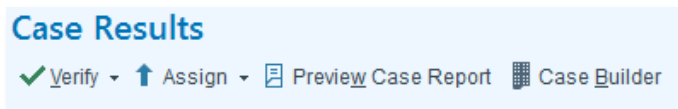


4. **Case Prep Work List** will now display the new button choices.

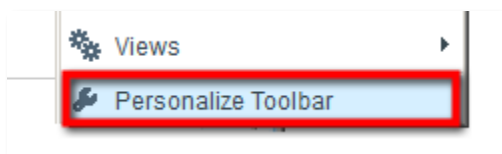


Customizing the Case Results Main toolbar:

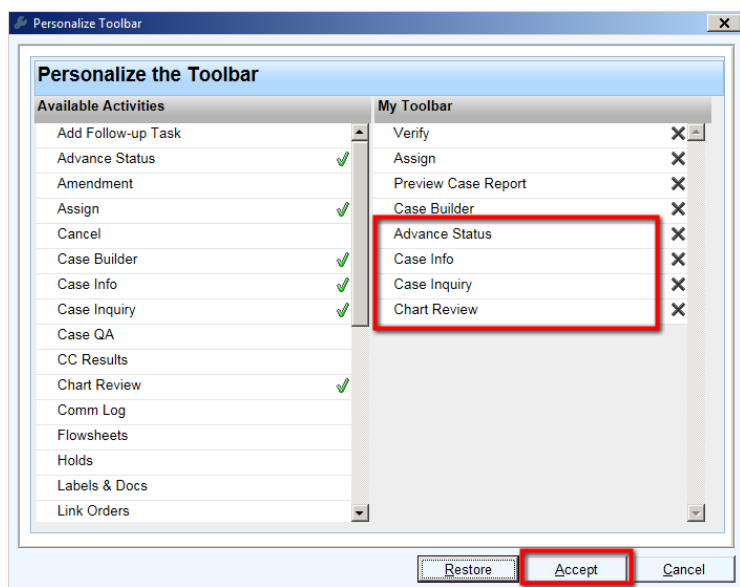
1. Open up any case in **Case Results** by double-clicking a case in the **Outstanding List**. The following buttons are default:



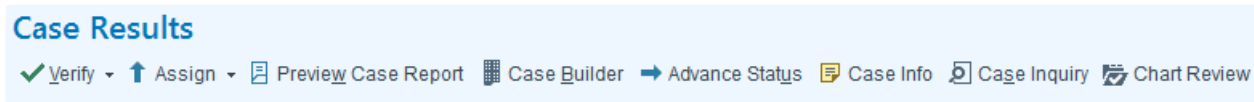
2. Click on the **Actions** button at the top right of the window and choose **Personalize Toolbar** at the bottom.



3. Drag the activities on the left side of the screen to right side column. When you are done adding buttons, click on the **Accept** button. Some recommended buttons include Advance Status, Case Info, Case Inquiry, Chart Review. You can also remove buttons by clicking on the **X** button on the right side column. Click the **Accept** button when done.




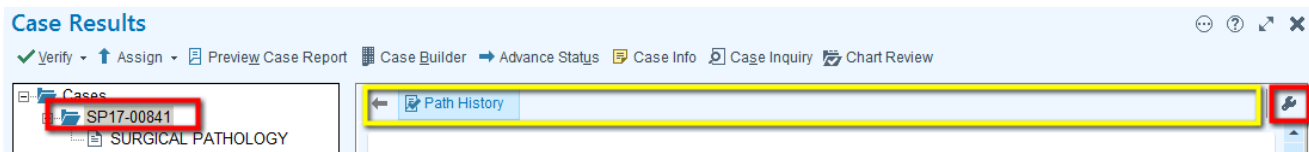
4. **Case Results** will now display the new button choices.



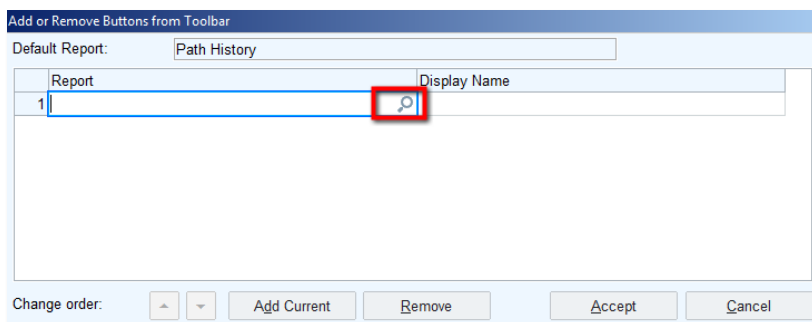
Customizing the Case Results results toolbar:

You can also customize the 2nd Case results button bar to get different views of the case information.

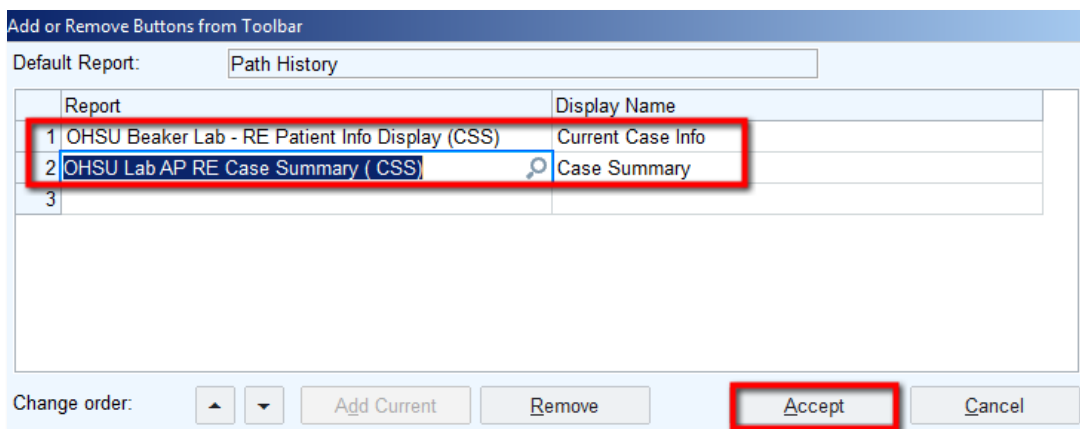
1. Make sure you have the **Case ID** selected on the left side of **Case Results**. Notice that the default button on this bar is **Path History**. Click on the  wrench icon on that toolbar.



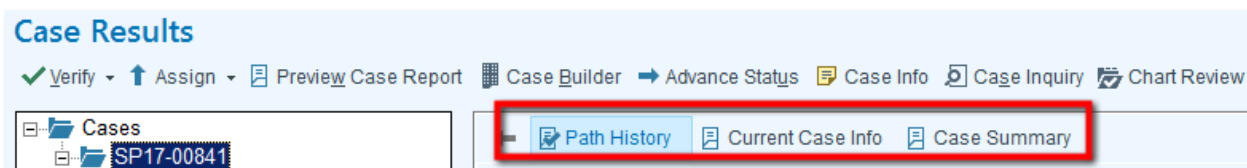
2. The following window will appear. Click on the magnifying glass icon to bring up other choices.



3. Select **OHSU Beaker Lab – RE Patient Info Display (CSS)** and click the **Accept** button. Click the 2nd row and click on the 2nd row's magnifying glass icon. Select **OHSU Lab AP RE Case Summary (CSS)**. Click the **Accept** button. You should have 2 rows filled out as below. Click on the **Accept** button.



4. The toolbar should look like this:



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