# SampleCabinet 1.2

Users manual

Designed by SeldonCo Powered by FileMaker

### Contents

What is SampleCabinet	1
Using SampleCabinet	2
The opening screen	2
How to enter new samples	2
Edit a drug listing	3
Adding samples to your inventory	3
How to dispense medication samples	4
To print a prescription label	5
To print and document your sample inventory	5
To print, document or find dispensed samples	6
To view detailed information about a sample in the inventory	6
Expired samples	6
Reconciling the inventory	6
Repair and sort the sample inventory	7
How to install Sample Cabinet (detailed)	8
filow to instan SampleCabinet (detailed)	0
SampleCabinet on an IPad (Recommended Installation)	6
SampleCabinet as a standalone program on a Mac or PC	٥
SampleCabinet on Fliewaker (Mac or PC)	·····9
SampleCabinet as a nosied Flielwaker or Flielwaker Server database (wac or PC	۲ ۱
Hosting by NeD	9 10
nosting by reer to reer	10
How to Back Up SampleCabinet	.12
Backun SampleCabinet run on an iPad (iTunes)	12
Backup SampleCabinet run on an iPad (iCloud)	12
Automated Daily Backups of SampleCabinet on iPad. Mac or PC	13
Backup SampleCabinet run on FileMaker Pro (Mac or PC)	14
Backup SampleCabinet Standalone versions (Mac or PC)	14
Backup SampleCabinet run on FileMaker Server	14
SampleCabinet Security	.15

## What is SampleCabinet?

SampleCabinet is a database that runs on the FileMaker Platform. It is designed to meet the regulatory requirements for keeping a Medication Sample Cabinet in a Physician's office. Evolving regulations require that Medication Samples be tracked from delivery by a Drug Rep (or mail) through office storage and to individual patients. Most clinics are required to maintain a weekly, or even daily inventory of the contents of their Sample Cabinet. Physicians (or their representatives) are required to sign for incoming samples and sign for dispensed samples. In some locations, prescription labels must be printed for dispensed samples. In addition, clinics are required to track specific lot numbers dispensed to patients in case of a recall. SampleCabinet accomplishes all of these tasks in one App. Permanent records of all samples passing through the clinic, signatures of personnel, lot numbers and expiration dates are maintained. Daily inventories can be printed with pressing a single button. SampleCabinet is designed to lighten the regulatory burden and allow Physicians to continue to provide patients with sample medications.

### How do I install SampleCabinet?

SampleCabinet is typically installed on an iPAD. You will need to download and install FileMaker Go from the Apple App Store. Then use iTunes to install SampleCabinet onto your iPad. Detailed instructions may be found under "Installing SampleCabinet" later in this manual.

SampleCabinet can also be run on Microsoft Surface. Any Windows of Apple OS X laptop or desktop computer. SampleCabinet may be run locally or on a remote server. It may be run for single or multiple simultaneous users. Detailed instructions on all installation may be found under "Installing SampleCabinet" later in this manual.

Information on how to backup SampleCabinet in each different operating environment may be found under "How to Back up SampleCabinet" later in this manual.

### **Using SampleCabinet**

**The opening screen** of SampleCabinet is the list of sample medicines on inventory. To make use easier, and for practice, entries of Aspirin and Advil are included. They may be deleted once you have entered some of the medicines you have in stock.

	Sample Cab	oinet Inventory Co	ntrol 4/1	6/20	?
Aspirin 325	Acetyl Salysilic Acid	00020	10/15/2023	29	Details
Advil 200	Ibuprofen	0000202	3/14/2017	8	Details

How to enter new medication samples. To enter new samples into your list, you must first enter the name of the drug into the drugs list. This need only be done once for each drug. Most drugs come in different doses, you will need to enter each dose as a different drug. First select or click on the option menu icon This will bring up a pulldown menu as shown at the right. Select add new drug.

Adding a new drug. Using the popup keyboard or attached keyboard, enter the Trade Name of the drug and the dose (amount contained in each tablet or spray or injection). It is important to enter each different sample dose as a different entry, for example "Aspirin 315" and "Aspirin 81." Next enter the generic name and the manufacturer. Enter the number of doses included in each sample package. Finally, you can enter the usual or



Available Drugs								
	Trade name	rade name and Dose		Generic Name		Pharmaceutical Com	pany	Doses/pkg
				Suggested Rx				
	Advair 250/50			Fluticasone/Salmeterol Gsk				1
				2 puffs into lungs twice	a day			
	Advair 500/50		vair 500/50 Fluticasone/salmeterol			GSK		1
				2 puffs, twice a day				
		Add Another Drug		Delete Drug		Back to Inventory		

recommended prescription directions. This is optional, entering these instructions now will allow you to quickly print labels for dispensed samples later. When you are finished, select "Back to Inventory." If you make an error or decide not to enter a drug, select "Delete Drug." You may enter more than one Drug or more than one dose of a drug by selecting "Add Another Drug."

**Edit a drug listing**. You may also use this screen to edit the listing for a drug. Since a new empty field is added when you go to this screen, first select "Delete Drug" to remove the empty field. Next scroll down to the Drug you wish to edit and select it. Make your edits and select "Back to Inventory."

Adding samples to your inventory. From the main inventory screen, select the pulldown menu icon . In the pulldown menu press "Add Samples." You can only enter samples of a drug if

vou previously entered the drug name into the Drug List (see above). Select the drug name field to get a pull down list of all drugs entered into the list. Select drug and dose matching your samples. The generic name, manufacturer, doses per package, and default prescription directions will be entered automatically from the drug list. Enter the lot number of the samples. Enter the expiration date. Select the correct month and year. The

Drug name Generic name     Lot # Exp date     Doses in pkg Pkgs received     Sales Rep Name     4/30/2017   Provider Accepting     Provider Signature (optional) Provider Rep.	Add Samples to Cabinet									?
Drug name Generic name     Lot # Exp date     Doses in pkg     Pkgs received     Sales Rep Name     4/30/2017    Provider Accepting  Provider Signature (optional)  Provider Rep.			7							
Lot # Exp date Doses in pkg Pkgs received     Sales Rep Name   4/30/2017   Provider Accepting  Provider Signature (optional) Provider Rep.	Drug name		/	Generic name			Manufacturer			
Sales Rep Name Suggested Rx   4/30/2017	Lot #				Exp date		Doses in pkg		Pkgs received	
Sales Rep Name     Sales Rep SIgnature     Suggested Rx       4/30/2017     Provider Accepting ▼     Provider Signature (optional)       Provider Rep.     ▼										
4/30/2017         Provider Accepting         Provider Rep.	Sales Rep Name				Suggested Rx					
Provider Accepting  Provider Signature (optional) Provider Rep.	4/30/2017			Sales Rep SIg						
Provider Accepting  Provider Signature (optional) Provider Rep.										
Provider Rep.	Provider Accepting	V								
	Provider Rep.	v		Provider Signature						

day will be automatically set to the first of the months when the entry is saved. Enter the number of sample boxes or packages being placed into your inventory in the "Pkgs received" field. If this field is left blank, zero samples will be added and your drug will not show up in the current inventory. Select the Provider who is accepting the samples from the "Provider Accepting" pulldown list. New Providers are added to the list by selecting the pulldown and then selecting "Other" to enter the new name. If the Samples are accepted by a nurse or other Provider representative, use the "Provider Rep" pulldown list. Select "Other" to enter new names on the list. IF YOU ARE USING AN iPAD, tap on the signature field and select "Signature" to enter the Provider signature. This will not work without a touch screen.

Depending on your local regulations, you may need to enter the name of the drug company representative into the "Sales Rep Name" field. IF YOU ARE USING AN iPAD, tap on the signature fields and select "Signature" to enter the Sales signature. This will not work on systems without a touch screen.

When you are finished, push the "Submit" button. Failure to use "Submit" will result in partial or absent entries in the sample inventory. If you make a mistake, press the "Cancel" button.

**How to dispense samples.** In the main inventory screen scroll down the drug you wish to dispense. Be certain to choose the dose, date and lot number matching the sample you are dispensing. Select the drug by pressing anywhere in the Drug Name, Generic Name, Lot number or Expiration date fields as circled below.

	Sample Cab	inet Inventory Cor	ntrol 4/1	6/20	?
Aspirin 325	Acetyl Salysilic Acid	00020	10/15/2023	29	Details
Advil 200	Ibuprofen	0000202	3/14/2017	8	Details

Do not press on the remaining samples number or on the "Details" button. These are for editing the sample information (see below).

Alternatively, you may also select the pulldown menu icon [1], and press the "Dispense Samples" button from the list.

		Dispense	Samples			?
Aspirin 325	T.	Acetyl Salysilic Acid		Bayer		
00020		10/15/2023		4/8/2017		
Pkgs Dispensed	]	Pkgs deprecated today		Rx for Label		
Patient Receiving		Patient DOB				
Provider Dispensing		Provider Sig		Click to Import Rx		
Provider Representative		literider olg		Print Rx Label		
		Submit	Cancel		10	34

On the "Dispense Samples" screen, the Drug, Generic name, manufacturer, lot number, receipt date and expiration date will be automatically entered for you. If this information is missing recheck your entries in the Sample list and the Drug list (see directions above). Tap (or click) the "Pkgs Dispensed" field one time for each sample package you are dispensing. You cannot type into this field. If you are disposing of samples, tap the "Pkgs deprecated today" field instead. For regulatory compliance, you will need to enter the name and birth date of the patient receiving the samples. Use the calendar popup to enter the birthdate. For regulatory compliance, you will also need to enter the name of the Provider dispensing the sample. Choose the Provider from the pulldown list in the "Provider Dispensing" field. If the Provider's name is not in the list, select "Other" to enter the Provider name into the list. If a nurse or other team member is dispensing

the samples for the Provider, enter that person's name into the "Provider Representative" field using the pulldown list. If the Provider representative's name is not in the list, select "Other" to enter the Provider representative name into the list. Tap "Provider Sig" to enter the dispensing

		Dispe	nse Samples				?
Aspirin 325	v	Acetyl Salysilic Ac	id	Bayer			
00020		10/15/2023		4/8/2017			
2		Pkgs deprecated t	oday	2 tabs PO	q 4 hr PRN		
John Public		12/12/1942					
The Doctor	v	Provider Sig		Click to	Import Rx		
Nurse Liz	T			Print F	Rx Label		
		Submit	Cancel			1034	

Provider's signature. Select "signature" from the popup menu, sign and then press or click "Done." SIGNATURES MAY ONLY BE ENTERED USING A TOUCH SCREEN device such as an iPAD.

To automatically include prescription directions, press "Click to Import Rx" button. Directions may also be entered directly, or altered by selecting the "Rx for label" field and typing directions (Sig.).

When you are finished, press the "Submit" button. If you need to print a prescription label, press the "Print Rx Label" button <u>before</u> you press the "Submit" button. Once submitted, the number of samples on hand will be updated in the inventory list, and the dispensing information will be saved in a Dispensed Samples list.

**To print a prescription label** Before press/click the "Print Rx Label" button before you press the "Submit" button. For iPad, you will require an "Airprint" enabled Printer. Surface will require a Windows compatible computer and laptop or desktop computers will require a printer installed on the computer. Follow the prompts from your OS to select the printer. The label generator is sized for a 2 X 2 or 2 X 3 inch label. Label writers may be used.

#### To print and document your sample

inventory. To print the daily or weekly inventory list, from the main inventory screen and select the pulldown menu icon Press/click "Print and Inventory" from the pulldown list. Your Operating System will prompt you for printer information. For iPad, you will require an "Airprint" enabled Printer. Surface will require a Windows compatible computer and laptop or desktop computers will require a printer installed on the computer. Follow the prompts from your OS to select <u>portrait view</u> on your printer and to Print. The printout has a date stamp. Be sure to select "Found Records" rather than current

Sample (	Cabinet Invento	ory	4/8/207	17		
Drug name	Generic name	L	ot #	Exp dat	e F	kgs in stoc
Advair	Fluticasone	6zp511		9/30/2017	1	
Advil 200	Ibuprofen	000020	2	3/14/2017	2	
Amitiza 24 mcg	Lubiprostone	300894	5-B1	05/01/2020	2	
Anoro Ellipta	Umeclidinium/vil	6ZP777	'8	8/30/2018	5	
Anoro Ellipta	Umeclidinium/vil	7ZP114	0	1/1/2019	2	
Asmanex HFA	Mometasone	M00075	52	8/1/2017	1	
Asmanex HFA	Mometasone	M03660	00	12/5/2017	1	
Asmanex	Mometasone	M02787	75	1/1/2018	2	
Aspirin 325	Acetyl Salysilic	00020		10/15/2023	20	
Aspirin 81	Acetyl Salycylic	000020	1	2/15/2018	12	
Breo	Fluticasone	R79220	)7	8/1/2018	2	
Breo Ellipta 100	Fluticasone	R76903	31	2/28/2018	1	
Breo Ellipta 100	Fluticasone	R77889	2	4/30/2018	1	
Bydureon	Exenatide	Hh5009	)	4/23/2018	1	
Bystolic 10	Nebivolol	W0036	2	6/1/2017	6	
Bystolic 20	Nebivolol	115670	5	8/22/2018	1	
Dexilant 60 mg	Dexlansoprazol	A23784		8/6/2019	4	
Dexilant 60 mg	Dexlansoprazol	A23659	)	7/20/2019	8	

select "Found Records" rather than current record in the print dialog.

**To print, document or find dispensed samples**. To review a list of dispensed samples, from the main inventory screen and select the pulldown menu icon . Press/click "Dispensed List" on the pulldown menu.

		Sa	mples	Dispensed		
DRUG		C	DATE	Lot #	PATIENT	
Aspirin 325	2	3/15/	/2017	00022	Paul	1036
Aspirin 325		3/15/	3/15/2017			1075
Aspirin 81	1	3/15/	3/15/2017		George	1035
DATE RANGE	From:	Start Date	То:	End Date	PRINT LIST	CANCEL

You can sort this list by drug name, date dispensed, lot number or patient name, using the buttons at the top of the screen. You can filter your list for a limited date range by entering the start and end dates (dd/mm/yyyy), then press the "DATE RANGE" button.

If you need to track a specific lot number for a recall, use the "Lot #" sort button, then scroll down to the desired lot number. Samples are listed first by lot and then by date dispensed.

The list of dispensed drugs (sorted and filtered) is printed by pressing the "PRINT LIST" button. For iPad, you will require an "Airprint" enabled Printer. Surface will require a Windows compatible computer and laptop or desktop computers will require a printer installed on the computer. Follow the prompts from your OS to select the printer.

Additional information about any dispensed sample is obtained by pressing anywhere along the line of an individual listing as shown by the red oval.

When finished with this function, press "CANCEL."

To view detailed information about a sample in the inventory. On the main inventory window, scroll to the desired sample and press the "Details" button. Some sample information can be edited from the detailed information window. Press "Cancel" when finished.

Expired samples. When	Advair	Fluticasone propionate	6zp511	9/30/2017	1	Details
sample packages pass	Advil 200	Ibuprofen	0000202	3/14/2017	2	Details
men expiration date, the						

date field in the main inventory screen turns red. Press/click on the sample just as you would to dispense it. On the "Dispense Samples" screen, tap the "Pkgs deprecated today" button once for each package to be disposed. Deprecated means that the package is disposed of instead of dispensed. See "how to dispense medication samples" above.

**Reconciling the inventory.** From time to time it may be necessary to update the number of sample packages in the inventory. On the main inventory screen scroll to the drug sample desired. Then tap/click on the number of sample packages field. An updated value may be

entered directly into the field. <u>Do not</u> use this method to add or dispense samples on a routine basis as no additional data or dispensing information will be saved.

**Repair and sort the sample inventory.** From time to time the inventory list may become missorted or contain incorrect entries. To re-sort the list, from the main inventory screen and select the pulldown menu icon . Press/click the "Sort" button.

# How to install SampleCabinet

Sample cabinet may be installed on an Apple iPad (any size), Microsoft Surface, Mac or PC laptop computer, desktop computer or server. It can be hosted on a server (or any computer) and accessed through the web on most browsers. It cannot be installed on an android OS, but browsers on the Android OS can access it if hosted on another computer. Popular installation configurations are listed below.

**SampleCabinet on an iPad (Recommended installation) -** SampleCabinet is a database that runs on the FileMaker Go platform. You must first install FileMaker Go on your iPad. It is FREE and available from the Apple iTunes store through the App Store application (<u>https://itunes.apple.com/us/app/filemaker-go-15/id998694623?mt=8</u>) from your iPad, or at <u>http://www.filemaker.com/products/filemaker-go/</u> You can load Sample Cabinet onto your iPad



using iTunes (Mac or PC versions). Connect the iPad to your computer running iTunes. Click on the device symbol at the top of the window. Once you have the iPad open, select File Sharing from the list on the left of the window (1). A list of the Apps using files on your iPad will appear. Scroll down until you see the FileMaker icon (2). Click on the icon and a list of databases available in FileMaker Go will appear to the right (3). At the bottom of the list section you will see and "Add" button. Click on this and use the dialog box to navigate to your

downloaded copy of SampleCabinet. Select Sample Cabinet and click "Done." You May now disconnect the iPad. Select FileMaker on

the Desktop and then select SampleCabinet from the available databases. You are now running SampleCabinet. It is both a good idea, and in most cases a regulatory requirement to back up SampleCabinet on a daily or weekly basis. See the section on Backups in this manual.



**SampleCabinet as a standalone program on a Mac or PC** – SampleCabinet can be downloaded as a standalone application that does not require FileMaker to turn on either Mac or PC. <u>This version does not support web connections or remote hosting of files</u>. The Download package contains the database and a trimmed down version of FileMaker sufficient to run the database. Download the "standalone" package for your OS from the website. Place the folder in Applications on Mac or \*\*\*\*\* on PC. Open the folder and click on the "\*\*\*\*\*" file to run SampleCabinet. You are encouraged to make a Desktop, Dock or Start Button Alias to this file so you can open it directly from your Desktop.



In some cases, on Mac, it will be necessary to allow an application from an unknown developer. First open the System Preferences if needed, your Mac will prompt you to do so. Select "Security and Privacy" and then the "General tab." In the dialog (shown at left) click on the lock icon to enter your password. Then UNCLICK the "App Store and Identified Developers" button. After installing and running SampleCabinet the first time, you can re-click the "App Store and Identified Developers" button. You need only do this process the first time.

**SampleCabinet on FileMaker (Mac or PC)** – SampleCabinet can be run as a database file on the FileMaker application. You will need to purchase FileMaker from <u>www.FileMaker.com</u>. Install the application. Place SampleCabinet in your documents folder or desktop folder. Double click on the SampleCabinet icon to launch it.

**SampleCabinet as a hosted FileMaker or FileMaker Server database (Mac or PC)** – Hosted refers to a single computer running SampleCabinet and allowing multiple clients (for example iPads or Android tablets) to access the database. This is a good solution if you have multiple users who may need simultaneous access. Purchase either FileMaker Pro (for 1-5 simultaneous clients) or FileMaker Server (for unlimited clients) and install on your Mac or PC. Load SampleCabinet into your Documents folder. Open FileMaker and within the application, open the SampleCabinet file. You can access the database remotely either by Web, or as a hosted database.

Hosting by Web – Open SampleCabinet database in your FileMaker application. Under

the File menu navigate to "Configure for WebDirect" as shown at right. Select the Configure option. FileMaker will then act as a web server to use SampleCabinet on any web browser (iPad, Android OS, Laptop, etc.). You will need the Internet address (IP address) of the host computer. On a local network, this is typically Computername.local



You will need to set up accounts for all users of the database on the web server. First, in FileMaker, navigate to File>Manage>Security as shown below.

FileMaker Pro Advanced	File Edit View Inser	t Forma	t Records Scrip	ts Tools V			
	New Solution New From Starter Solution	on	60 Bogs Review View SampleCabinet				
Home Insert Dr	Open Open Remote	第0 企業O					
C > 10 Records	Open Recent Open Favorite Close	¥w	Record Delete Record	Q I Find S			
Layout: Samples in cabinet 👻	Manage	►	Database	企業D			
	Sharing	Þ	Security Value Lists				
Advil 200	File Options Change Password		Layouts Scripts External Data So	ጉ₩S			
	Page Setup Print	ЖР	Containers Custom Functions				
Advil 200	Import Records Export Records						

Select Security and a dialog will allow you to add new Users. Typically you will want to authenticate via the Local FileMaker File. The Account name is set up in this dialog as is the password. Set the new account for data entry. Do not set up an administrator account. Do not set up a read only account.

When you click OK an account priviledge dialog will appear. Use the default settings, already entered.

Users can now access SampleCabinet using any web browser. They will be required to log in for each use and re-log in if left idle for a few minutes. Up to 5 simultaneous Web users may connect vie FileMaker Pro or unlimited users via FileMaker Server. This file must be backed up within the host 

 Manage Security for "SampleCabinet"

 Check to make an account active. Drag account name to set authentication order.

 General Security for "SampleCabinet"

 Admin

 Jadmin

 July Access)

 Account Name

 Data Entry Only

 Account Tep 

 Use Detailed Setup...

computer, backup options within SampleCabinet do not function via the browser.

Hosting by Peer to Peer – Filemaker Go and FileMaker Pro may be used as clients for a

hosted database. Purchase FileMaker Pro (1-5 simultaneous clients) or FileMaker Server (unlimited clients) and install the application on your host computer. Load SampleCabinet into your Documents folder. Open SampleCabinet on the host computer. Your will also need either FileMaker Go on the client iPads, or FileMaker Pro on client laptops/desktops (Mac or PC). In the Filemaker Pro application, set up the SampleCabinet database for sharing as shown on the right. You will also need to set up client accounts



so that users can log in to the database. First, in FileMaker, navigate to

FileMaker Pro Advanced	File I	Edit View	Insert	Format	Records	Scripts	Tools	١
	New New	Solution From Start	er Solutio	n		Sample	Cabinet 1	ALC: N
Home insert Dr	Open 第0 Open Remote 企業0				ings Rovi Sampl	eCabinet		
	Oper Oper	Recent Favorite		► ₩W	÷ E	-	Q.	1
Layout: Samples in cabinet V	Mana	ge		•	Database.		rind <b>企業D</b>	1
	Sharing			•	Security Value List	s		þ
Advil 200	File Options Change Password				Layouts 1 Scripts 1			
	Page Setup Print			жР	Containers Custom Functions			
Advil 200	Import Records Export Records Save/Send Records As			•	Custom Menus Themes			J

File>Manage>Security as shown below.

Select Security and a dialog will allow you to add new Users. Typically you will want to authenticate via the Local FileMaker File. The Account name is set up in this dialog as is the password. Set the new account for data entry. Do not set up an administrator account. Do not set up a read only account.

When you click OK an account priviledge dialog will appear. Use the default settings, already entered.

Users can now access SampleCabinet using FileMaker Go on iPad or FileMaker Pro on Mac or PC. They will be required to log in for each use and re-log in if left idle for a few minutes. Up to 5 simultaneous client users may connect vie FileMaker Pro or unlimited users via FileMaker Server. Clients log in by opening the Filemaker Go

or FileMaker Pro application and in the File

Che	eck to make an account a [Guest] [Read-Only Access]	ictive. Dr	ag account name to set auth Authenticate via:	• Local FileMaker file		
<b>v</b>	Admin [Full Access]					
	Account Name		Account Name:	Account Name		
	[Data Entry Only]		Password:	<no password=""></no>	Change	
				Require password change or	n next login	
			Privilege Set:	[Data Entry Only]	Edit	
+	New Account 🔳 🗕					
L	Jse Detailed Setup			Canc	el OK	

menu, select Hosts, then navigate to the hosted file on the computer running the database. It is important the host computer already be running SampleCabinet as a hosted file

for the clients to be able to connect. Backups can be performed from the Host

8 - 🖶	D T	11 V	Launch Center			
			My Solutions	Hosts		

computer but should not be made from the client.

# How to Back Up SampleCabinet

Good practice and HIPPA regulations require fequent backup of computer records. There are multiple methods to make backups. Multiple methods can be used together.

**Backup SampleCabinet run on an iPad (iTunes)** – When installing Filemaker Go on your iPad, set iTunes to automatically sync the application files. SampleCabinet will be backed up every time you plug the iPad back into the computer (for example to charge over night). Access to the Backup will require your computer ID/Password as well as your iPad ID/Password. If your computer is HIPPA

••• •• •	· · · - · - · - · · ·
$\langle \rangle$	
Roo 32GB	▲ 100% <b>—</b> :≁
Settings	
Summary	
Apps	

compliant, your backup will also be compliant. You can also open iTunes, click on the device icon and select summary. Then select "This computer." For additional security select "Encrypt local backup."

Backups

utomatically Back Up	Manually Back Up and Restore		
<ul> <li>iCloud</li> <li>Back up the most important data on your iPad to iCloud.</li> </ul>	Manually back up your iPad to this computer or restore a backup stored on this computer.		
This computer A full backup of your iPad will be stored on this computer.	Back Up Now Restore Backup		
Encrypt local backup This will allow account passwords, Health, and HomeKit data to be backed up.	Latest Backup: Today 5:20 PM to iCloud		
Change Password			

Ontions

**Backup SampleCabinet run on an iPad (iCloud)** – When setting up your iPad, you have the opportunity to back up all data to iCloud. Up to 5 GB is free. Select the option to back up all data to the iCloudYour SampleCabinet will back up every time the file is changed and the iPad is in contact with the internet. The backup is encrypted with your apple ID and password. iCloud sorage is HIPPA compliant. It is important that you use an Apple ID dedicated to your clinic use. If multiple iPads or Apple devices are set up using the same Apple ID, SampleCabinet and your other files may be copied across all of those devices. You can also do this as a later time by plugging your iPad into your computer, launching iTunes. Select the iPad icon. Select "Summary" as shown above. Then select Automatically Back Up to "iCloud."

#### Automated Daily Backups of SampleCabinet on iPad, Mac or PC- SampleCabinet features

Sample Cabine 6zp 000 300 tone 6ZP inium/vilanterol inium/vilanterol 775 sone furoate MOC sone furoate M03 sone furoate MO2 alysilic Acid 000 alycylic Acid 000

Advanced Backup

an internal backup system that will produce a new, dated

It is not tested with FileMaker Server. You will need an

backup file with the first use of SampleCabinet each day. You

can use this feature with SampleCabinet Standalone versions

(Mac of PC), SampleCabinet database run on FileMaker Pro (Mac or PC) and on iPad with FileMaker Go powered version.

accessible shared folder on your intranet or on your internet

pull down the options menu E. From the menu, select

Settings/Backup. You will be taken to a listing of backup

methods similar to this manual. At the bottom of the page,

server. To activate this backup server, open SampleCabinet and

select Advanced Backup. You will be taken to another page for

entry of specific information.

Instructions are repeated on that page. You will need an IP or network address for the computer or networked drive where your backups will be stored.

You will need a folder on that computer or drive where you have write permissions to place your backup files.

Settings							
Enable Backups	Yes x No	today	4/8/2017	Last Backup	4/3/2017		
Backup Base Name	SampleCabinet						
BackupURL	afp://name:password@ServerURL/sharename		afp or smb://name:pa	ssword@ServerURL/sha	are/ Test URL		
Backup Location file://MountedShareName(may differ from above)/folder (or director		lory)	file://MountedShare/folder/		Browse Location		
Current Backup Name	201748.fmp12				Test		

The <u>Backup Base Name</u> is used along with the date to generate the name of the backup file. The file created will be "FileNameYYYMMDD.fmp12". Do not use spaces or other characters such as (/) which may confuse the computer where the file is stored.

The <u>BackupURL</u> is the location of the shared folder on the intranet or internet. Allowable connections protocols are afp: or smb: (Mac), or smb: (windows). SampleCabinet does not support ftp:. Click on "Test URL." A new window should open with your target folder displayed. If not, recheck your URL and your read/write permissions.

<u>Backup Location</u> is a defined Path to your backup folder. From a Mac or PC, you can find this path by clicking on "Browse Location" and using the dialog box to navigate to the shared folder on the computer or drive where the backup is to be stored. The browse function is not available on iPad, you will have to manually enter the Path in this case. In order to make sure that the location is available be sure to first click "Test URL." This action will mount the selected drive making its contents accessible. You cannot access a drive which has not been mounted. <u>Click "Test."</u> An automatically named backup file should appear in your selected shared folder.

It may take up to 2 minutes for this to appear, do not be impatient.

<u>Finally, select the "Yes" box next to "Enable Backups."</u> Once completed, your SampleCabinet will automatically place a dated backup file in your selected share each day on the first use of SampleCabinet. If you do not use SampleCabinet (perhaps on a weekend), no new backup will be created that day. If the shared folder is not available, you may get an error. Do not place your

backups onto a laptop as shared folders are not available when the laptop is in sleep mode. Security of the automatic backup is the same as that of any other files in the designated share.

**Backup SampleCabinet run on FileMaker Pro (Mac or PC)** – The SampleCabinet database is kept in your documents folder, it will be backed up during routine backups of your computer.

**Backup SampleCabinet Standalone versions (Mac or PC)** – The standalone folder should have been placed in your Spplications folder (Mac) or Windows folder (PC). Be certain to include the SampleCabinet folder in your routine (daily) backups of your desktop or laptop. If the applications folder is not backed up routinely, you may place the SampleCabinet standalone folder into your Documents folder and run it from there. It will be backed up along with your other documents. Security of this backup is the same as for your other backed up computer files.

**Backup SampleCabinet run on FileMaker Server** – FileMaker Server features its own backup system. If you are hosting SampleCabinet on FileMakeer Server, use the Server feature for all backups. FileMaker Server backups are secure and password protected.

### SampleCabinet Security

The security of SampleCabinet and its backups is dependent upon the configuration use. The most secure configuration is to run SampleCabinet on an iPad with Filemaker Go and iCloud storage is HIPPA compliant. iPad storage is encrypted to a 6 digit code and will self-delete after too many access attempts. Previous publically reported attempts by the FBI to break iPad security took months with the lesser 4 digit code, and required both custom hardware and custom software to accomplish. Apple reports that it may be able to crack iCloud backup encryption with a court order but reports that it has never done so.

SampleCabinet stored as a file on a computer will be protected by the computer ID/Password along with assigned read and write permissions. If your system is HIPPA compliant and the permissions are set correctly, your SampleCabinet files and backup files will also be secure and HIPPA compliant.

Peer to Peer sharing with SampleCabinet on FileMaker is not automatically encrypted. If run on your intranet behind a firewall, the solution will be secure. If sent over the internet it can be protected by your VPN. If no VPN is used, unencrypted data will be sent.

Web sharing with SampleCabinet on FileMaker is not automatically encrypted. It is highly suggested that such sharing be used with an internal IP address (for example 192.168.nnn.nnn) and used over your intranet or VPN only. If run on your intranet (wired or wireless with WEP2 or better encryption) behind a firewall, the solution will be secure and HIPPA compliant. If sent over the internet it can be protected by your VPN. If no VPN is used, unencrypted data will be sent.