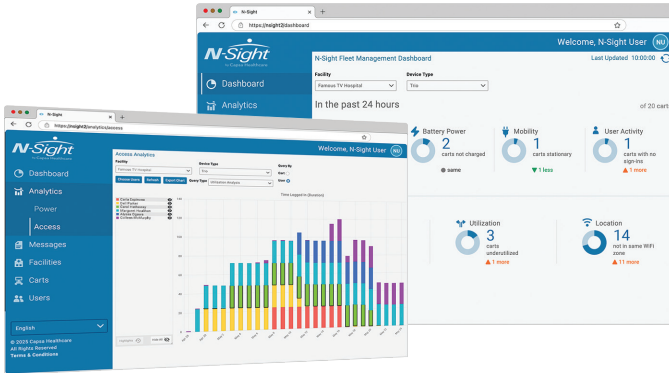




# CAPSAHEALTHCARE

Engineering a path to better care.



## N-Sight 2 Quick Start Guide

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# Introduction

N-Sight allows you to remotely manage your fleet of carts across all your facilities.

This Quick Start Guide will show you:

- How to log in to N-Sight and set your password.  
See **Starting N-Sight** below.
- How to create facilities.  
See **Add a facility** on page 7.
- How to distribute your carts to your facilities.  
See **Transferring carts** on page 8.
- How to add users to your facilities.  
See **Adding users manually** on page 21 and **Importing Cart Users** on page 23.
- How to assign users to carts.  
See **Assigning carts to users** on page 26.

## Terms to know

**Facility:** A facility in N-Sight represents a physical location where you've allotted one or more carts. This is usually one building but might be several buildings on a campus if carts frequently travel between the buildings.

**Cart:** The software representation of a Trio, CareLink, or Avalo as a device type. Within N-Sight, you change certain software settings which then cause the behavior of an actual cart to change (for example, you can give a user access to a cart, or turn on a Trio's notification light).

**User:** This is an account within N-Sight, which is assigned to an actual person. There are two types of users: those who actually access physical carts (called *Cart Users*), and those who access the N-Sight software (called *web users*).

## Network setup

Network administrators install proxy servers, firewalls, or similar devices to secure and control user internet access. Rules designed to protect users can block or slow down N-Sight-related internet traffic.

For your carts to be able to sync with N-Sight, you need to add specific URLs to the allowlist on your firewall or proxy server. If you have syncing issues with your carts, it may be because access to one of these websites is blocked.

## Trio

<https://portal.capsahealthcare.com>  
<https://nsight2.capsahealthcare.com>  
<https://capsa-api.capsahealthcare.com>  
<https://signalr.capsahealthcare.com>  
<https://cap-usa-uswe-prd-signalr-001.azurewebsites.net>  
<https://usa-cap-sigr-prod-002.azurewebsites.net>  
<https://signalr-usa-shared-prod-002.service.signalr.net>  
<http://worldtimeapi.org>  
<https://capsastorageprod.blob.core.windows.net>

## CareLink

<https://portal.capsahealthcare.com>  
<https://nsight2.capsahealthcare.com>  
<https://cartservices-sync.capsahealthcare.com>

## Avalo

In addition to unblocking these URLs, Avalo carts need to have Port 443 open on your organization's firewall.

<https://portal.capsahealthcare.com>  
<https://nsight2.capsahealthcare.com>  
<https://capsa-api.capsahealthcare.com>  
<https://signalr.capsahealthcare.com>  
<https://cap-usa-uswe-prd-signalr-001.azurewebsites.net>  
<https://usa-cap-sigr-prod-002.azurewebsites.net>

## Starting N-Sight

You'll have received an email invitation to use N-Sight.

1. Follow the link in the email.
2. Enter the login name you were given.
3. Select a security question and type the answer to it, then click **Next**.
4. Create a password and confirm it.

You'll then be logged in to N-Sight.

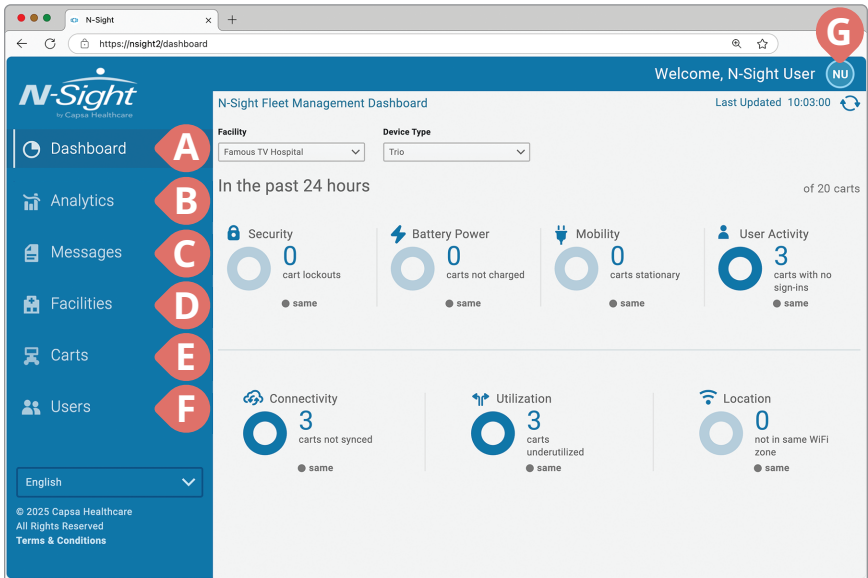


**IMPORTANT:** Be sure to record your user name, password, and security question and answer.

# Navigating N-Sight


The N-Sight screen is divided into two sections: the navigation menu on the left, and the main work area on the right.

Click an entry in the navigation menu on the left to see additional options.



**Figure 1: The N-Sight main screen**

- A. Dashboard:** Summarizes cart events from the past 24 hours.
- B. Analytics:** Generate reports on cart power usage and access.
- C. Messages:** Configure, send, and read messages sent between N-Sight and carts or Cart Users.
- D. Facilities:** Add the different buildings or campuses in your organization and customize cart default settings for each facility.
- E. Carts:** Create cart groups, update cart software, and transfer carts between facilities.
- F. Users:** Create cart and N-Sight user accounts, assign users to carts, and monitor web user and Cart User activity.
- G. User menu:** (top right) Allows you to change your N-Sight password and log out of N-Sight.

**TIP:** When you see the  symbol in N-Sight, just hover the mouse pointer over it for a brief explanation of the feature.

# Facilities

A facility in N-Sight is a location in your organization where there's an allotted number of carts. This is usually one building but might be several buildings on a campus.

## NOTE

When you first gain access to N-Sight, you'll already have a facility created for you, with all of your carts assigned to it. (Usually this facility will be called "Warehouse".)

If you have more than one facility that you'll send your carts to, you can create more facilities within N-Sight, then transfer carts to the other facilities. See **Transferring carts** on page 8.

You can rename facilities in the **Profile** tab under **Facilities > Manage**. See also **Cart default settings** on page 11.

## Add a facility

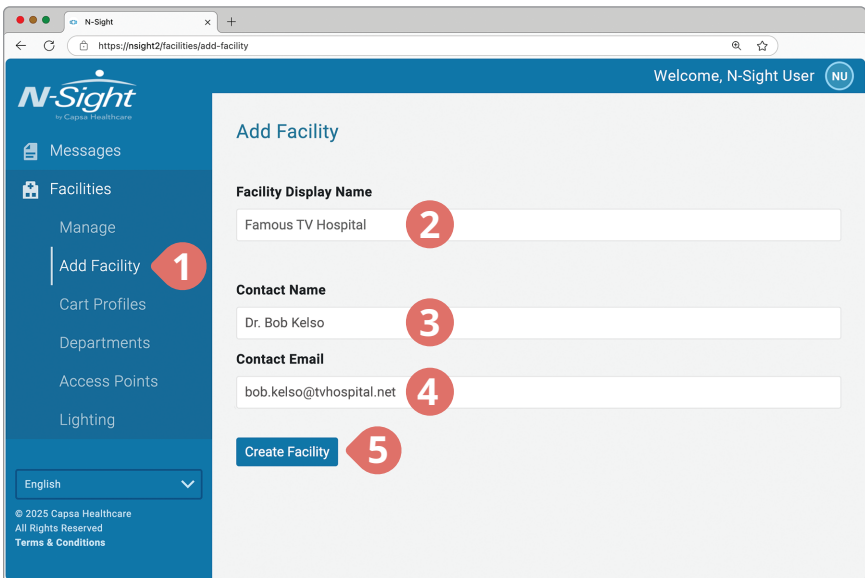


Figure 2: Add Facility

1. Click **Facilities > Add Facility**.
2. Enter the facility's display name.

This is how the facility will be displayed throughout N-Sight. If the facility's actual name is very long, you might want to enter the everyday version of the name that you use internally.

3. Enter the name of the contact person at that facility.

This is the person that would be the point of contact between the facility and Capsa Healthcare for issues relating to N-Sight maintenance and support.

4. Enter their email address.

This is the email address they would use when reaching out to Capsa Healthcare.

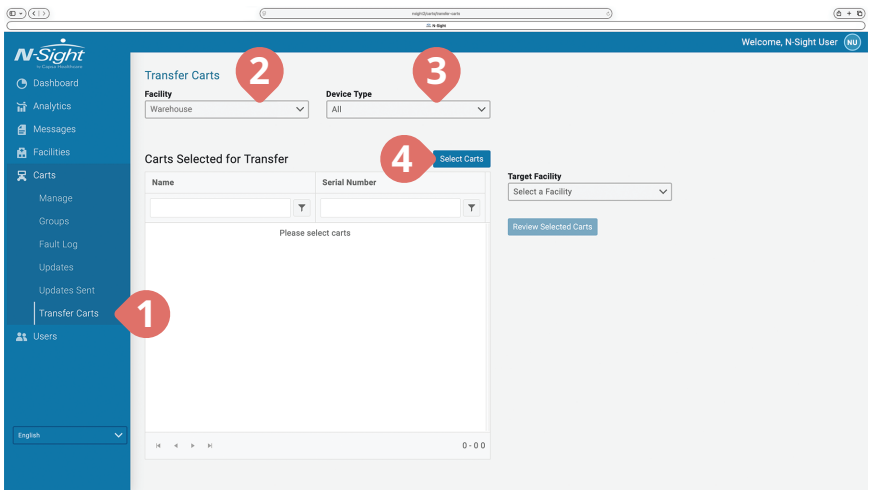
5. Click **Create Facility**.

**NOTE:** You can change these settings for the facility in the **Profile** tab under **Facilities > Manage**.

## Transferring carts

When you initially access N-Sight, you'll have one facility with all your carts assigned to it. This facility is usually called "Warehouse".

If you have additional facilities, you can add them to N-Sight (see **Add a facility** on page 7), then transfer carts to the other facilities.



**Figure 3: Transfer Carts screen (no carts selected)**

1. Click **Carts > Transfer Carts**.

2. Click the **Facility** menu at the top left and choose the facility that you want to transfer carts **from**.

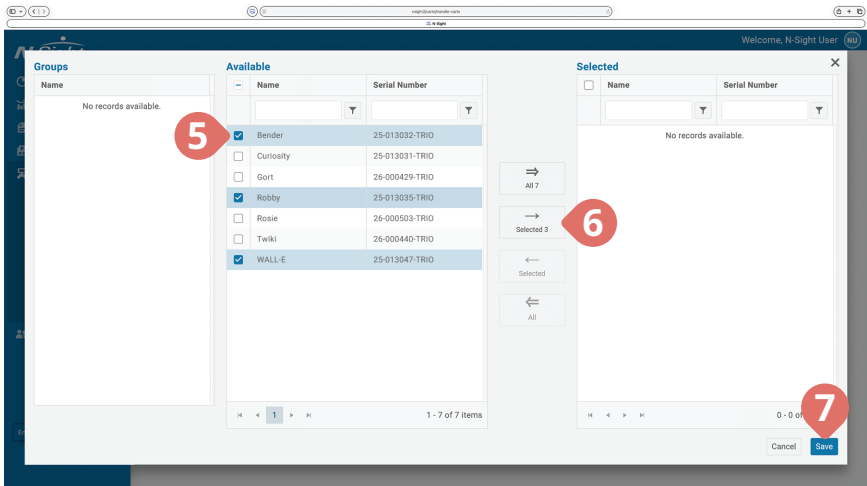
Initially, this will be the facility created for you by Capsa Healthcare.

3. Click the **Device Type** menu and choose the type of cart you want to transfer.

Select **All** to see all the cart types at the selected facility.

4. Click **Select Carts** to open the cart selection window.

If the button reads **No Carts**, then the chosen facility has no carts of the chosen device type available to transfer.



**Figure 4: Cart Selection window**

5. Select carts in the **Available** list in the center of the window.

If you have cart groups, you can select one or more groups from the list on the left.

6. Click **→ Selected** to add the carts to the **Selected** list on the right

You can also click **⇒ All** to add all available carts to the list.

7. Click **Save** to return to the **Transfer Carts** screen.

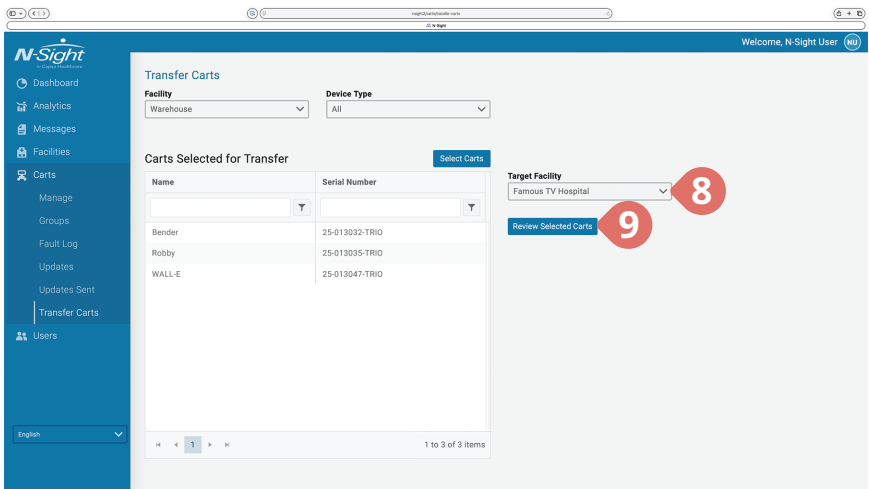


Figure 5: Transfer Carts screen (with carts selected)

- 8. Click the **Target Facility** menu at the right and choose the facility to transfer carts to.
- 9. Click **Review Selected Carts** to transfer the carts.

This opens the **Transfer** window. This window shows the carts you have selected and their transfer status.

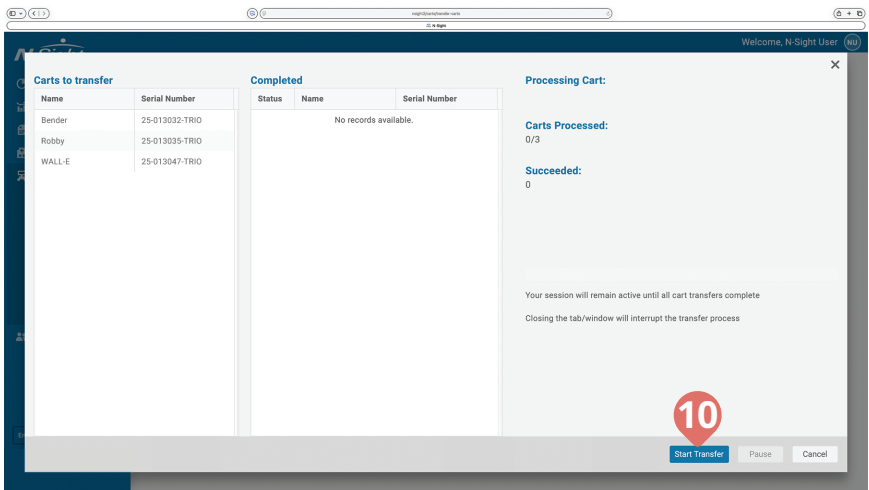


Figure 6: Transfer window

- 10. Click **Start Transfer**.  
N-Sight will transfer the carts and all their data to the new facility.
- 11. Once the transfer is complete, click **Close** at the bottom right of the **Transfer** window.

## Cart default settings

You can specify the default settings for each type of cart. These defaults will be applied to all the carts currently attached to your facility, and all carts added in the future.

Here we'll emphasize the settings that you're most likely to change.



**TIP:** Remember to click **Save All Settings** before you exit this workspace. You may need to scroll to see the **Save All Settings** button.

To get started:

1. Click **Facilities > Manage**.
2. Click the **Facility** menu and choose your facility.
3. Click the **Device Type** menu and choose the type of cart that you want to set defaults for.
4. Click one of the tabs to see a related group of settings.

The screenshot shows the 'Manage Facilities' page in the N-Sight system. The left sidebar contains navigation options: Messages, Facilities (Manage, Add Facility, Cart Profiles, Departments, Access Points, Lighting), and Carts (English dropdown). The main content area is titled 'Manage Facilities' and shows settings for 'Famous TV Hospital' and 'Trio' device type. The 'Device Type' dropdown is highlighted with a red circle 'B'. Below it are tabs for Profile, Display & Alerts (highlighted with 'A'), Battery, PINs (highlighted with 'C'), Timeouts, Login Required, Notifications, and Service Requests. The 'Display & Alerts' tab is active, showing fields for Facility Display (Famous TV, highlighted with 'A'), Facility FMS Name, Brand Logo (CAPSA HEALTHCARE, highlighted with 'E'), Contact Name (Dr. Bob Kelson, highlighted with 'D'), and Contact Email (bob.kelson@tvhospital.net). A 'Save All Settings' button is at the bottom left.

**Figure 7: Cart default settings**

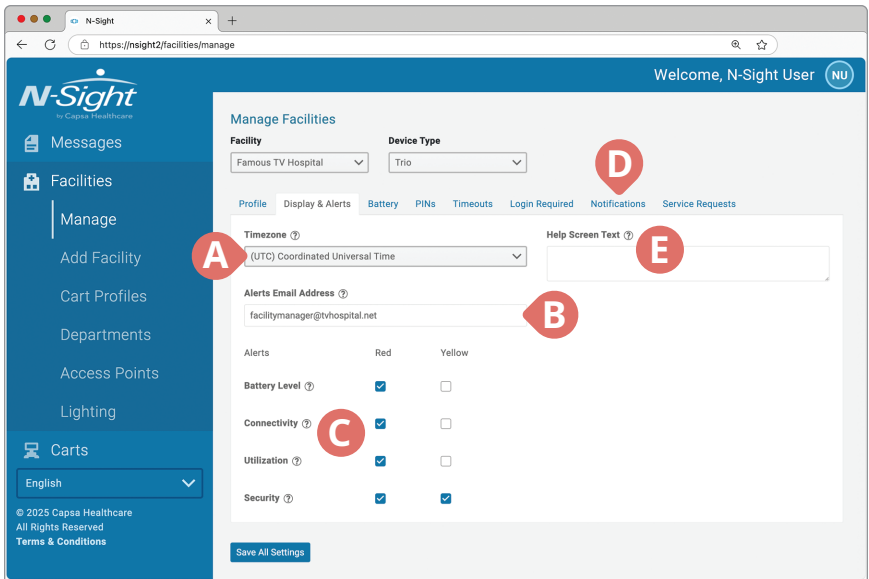
- A. Display & Alerts:** Set the time zone used by your carts, and configure email alerts for certain cart conditions.
- B. Battery:** Set battery percentages and battery warning messages to be displayed on the cart.
- C. PINs:** Set the PIN length for the number of digits to be used for each Cart User (for the selected type of cart). This tab also controls the settings for PIN Lockouts (number of repeated failed login attempts).

- D. **Login Required:** Set features of the cart that require a user to be logged in to use.
- E. **Brand Logo:** (Trio only) Add a logo or graphic to display on the screen of all Trio carts.

## Trio and CareLink shared defaults

**i IMPORTANT:** When you change any of these default settings for either the Trio or CareLink M48 cart, it changes the default for **both** types of cart.

## Display & Alerts



- A. The **Timezone** used on your Trio and CareLink carts.  
The time zone is used in the on-screen clock, messages, and log files.
- B. The **Alerts Email Address** is where messages will be sent by the cart if any of the selected conditions are reached.
- C. Conditions that will generate email **Alerts**.
  - **Battery Level:** Send alerts when the battery charge reaches a warning level or a critical level.  
You can set the Yellow and Red levels in **Manage Facilities > Battery**.
  - **Connectivity:** Send alerts when the cart hasn't been connected to N-Sight.  
Yellow means the cart hasn't connected in over an hour, while Red means the cart hasn't connected in 24 hours.
  - **Utilization:** Send alerts when no user has logged in to the cart for 12 hours (Yellow) or 24 hours (Red).

- **Security:** Send alerts when the cart has been locked by invalid login attempts. Yellow means there have been 1 or 2 lockouts; Red means there have been 3 or more.  
You can set how many attempts will cause the cart to be locked in the **PINs** tab.
- D. Notifications:** This tab is only present when **Device Type** is Trio.
- E. Help Screen Text:** This feature is only present when **Device Type** is CareLink.

## PINs

Each user has a unique PIN for each type of cart they're assigned to. The PIN allows them to access any cart of that type that they've been assigned to. See **Assigning carts to users** on page 26.

The screenshot shows the 'Manage Facilities' page in the N-Sight system. The 'Facility' is set to 'Famous TV Hospital' and the 'Device Type' is 'Trio'. The 'PINs' tab is selected, displaying the following settings:

- PIN Lockout (# of Repeat Attempts):** 15 (Callout A)
- Keypad Entry:** 5 seconds (Callout B)
- PIN Lockout Time:** 2 minutes (Callout C)
- PIN Length (Digits):** 4 (Callout D)
- Partial PIN Entry:** 10 seconds (Callout E)
- Facility IT Admin PIN Code:** 1234 (Callout F)

A 'Save All Settings' button is located at the bottom of the settings area.

- A. PIN Lockout:** This is the number of times in a row that a user can enter an invalid PIN before the cart is locked.  
The cart will remain locked for the **PIN Lockout Time**.
- B. Keypad Entry:** This is the amount of time after the user enters a digit in their PIN before it turns to a black dot.
- C. PIN Lockout Time:** The length of time that the cart will be locked after too many invalid PINs have been entered in a row.  
If you choose **Lockout Override Required** from the **PIN Lockout Time** menu, the cart will remain locked until a user with the **Can Override Lockouts** setting logs in to the cart. See **User settings for Trio and CareLink** on page 30.

- D. PIN Length:** The number of digits in the Cart User's PIN.  
This setting changes the PIN length for all users of the selected cart type.



**IMPORTANT:** If you change this setting, all user PINs will be regenerated when you click **Save All Settings**.

- E. Partial PIN Entry:** This is the length of time the cart allows between key presses while a user is entering their PIN.  
If a user enters part of their PIN and then waits too long, the cart clears the PIN. The cart remains in its previous state.
- F. Facility IT Admin PIN Code:** (Trio only) This is a system-generated PIN that IT personnel can use to access the IT menus on a cart.  
This PIN will be regenerated if you change the **PIN Length**. Otherwise, you can't set or change this PIN.

#### RETRIEVING A USER'S PIN

When you change the PIN length for a cart, all users' PINs will be regenerated.

To retrieve a user's PIN:

1. Click **Users > Manage**.
2. Click **Select** next to the user.
3. Scroll down to **Facility Configuration**.
4. Choose the **Organization**, **Facility**, and **Device Type** from the menus.
5. Click the **Cart Settings** tab.

The user's **PIN code** is displayed at the bottom.

**TIP:** You can also generate a new PIN for the user here.

## Login Required

You can restrict certain cart features so that they can only be viewed and accessed by someone who has logged in to the cart with a valid PIN. This can be helpful if carts are in a public traffic area. These features can be restricted:

- **Calculator:** A basic five-function calculator.
- **Light:** Light controls on the main screen.
- **Lift:** On-screen controls for the electronic lift.
- **Notification: Alerts and Notifications** system on the cart.
- **Help:** On-cart **Help** screens.
- **Service Requests:** Sending **Service Requests** from the cart to N-Sight.
- **Settings:** Change cart settings.
- **Timer:** (Trio only) Countdown timer within the cart's **Tools** menu.
- **Conversion:** (Trio only) Metric conversion utility within the cart's **Tools** menu.

## Avalo PIN length

You can change the length of user access (“primary”) PINs used on your Avalo carts.

Primary PINs can be 4, 5, or 6 digits. The PIN length is the same for all users.

**NOTE:** Secondary PINs, used to access narcotics drawers on the Avalo carts, are always 4 digits long.

To change the primary PIN length for Avalo carts:

1. Click **Facilities > Manage**.
2. Click the **Facilities** menu and choose your facility.
3. Click the **Device Type** menu and choose **Avalo**.
4. Click the **PINs** tab, then choose the PIN length from the menu.
5. Click **Save All Settings**.
6. In the confirmation dialog, click **Keep Changes**.

When you change the PIN length, N-Sight will regenerate the primary PIN for every Avalo user in the selected facility. Users will need their new PIN to access carts.

**TIP:** See *Retrieving a user's PIN* on page 14.

## Trio lighting defaults

Trio carts support lighting themes: sets of color and brightness settings for the individual lights on the cart.

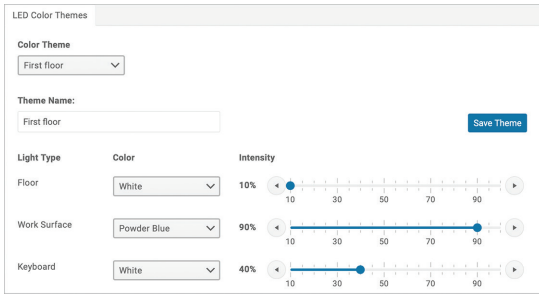
Lighting themes can be useful to identify carts on different floors or units.

To modify a lighting theme:

1. Click **Facilities > Lighting**.
2. Click the **Facility** menu and choose your facility.
3. Click the **Device Type** menu and choose **Trio**.
4. Click the **Color Theme** menu and choose a theme.
5. Click in the **Theme Name** field and enter a name for the theme.

You can't change the name of the **Default** theme.

6. For each light type (**Floor**, **Work Surface**, and **Keyboard**):



- a. Click the **Color** menu and choose a color for the light.
- b. Drag the slider or use the ◀ or ▶ arrow controls to set the **Intensity** (brightness) for the light.

7. Click **Save Theme**.

# Carts

In N-Sight, the term *cart* refers to one physical device: a Trio, CareLink M48, or Avalo cart.

Initially, your carts are assigned to a default facility within N-Sight created for your organization by Capsa Healthcare.

You can create additional facilities (see **Add a facility** on page 7) and transfer carts from one facility to another (see **Transferring carts** on page 8).

You can set defaults for carts within each facility (see **Cart default settings** on page 11).

You can also change settings for specific carts.

## Cart-specific details

To view and set details for a specific cart:

1. Click **Carts > Manage**.
2. Click the **Facility** menu and choose the facility.
3. Click the **Device Type** menu and choose the cart type.

N-Sight will display a list of the *active* carts of the selected type.

To see all active and inactive Trio or CareLink carts, check the box labeled **Include inactive carts**. (Avalo carts are always active.)

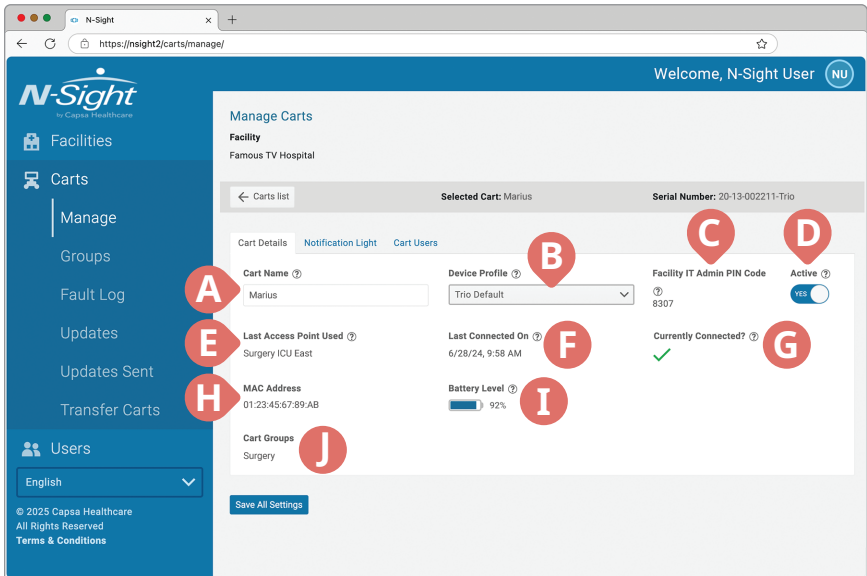
4. In the list of carts, click **Select** next to a cart to view its details.

Each cart type shows different tabs where you can view and change several settings for individual carts.



**IMPORTANT:** Changes to any of the cart's settings won't take effect until you click **Save All Settings**.

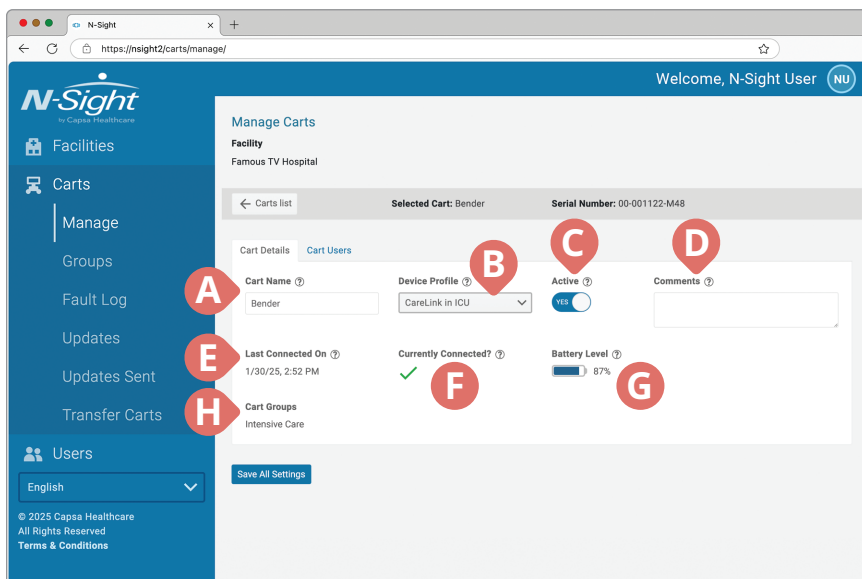
# Trio





**Figure 8: Trio cart details**

- A. Cart Name:** The common identifiable name of the cart.  
There's no length limit in the cart name field, but the cart will only show the first 17–25 characters.
- B. Device Profile:** A collection of settings that can be applied to the cart.  
You can create profiles in **Facility > Profiles**.
- C. Facility IT Admin PIN Code:** This code is automatically assigned to each cart and allows IT staff to log in and access the cart's IT menus.
- D. Active:** When the cart is active, users assigned to the cart can log in to it with their PIN.  
When the cart is inactive, no user can log in to it.
- E. Last Access Point Used:** The access point that the cart was connected to the last time it communicated with N-Sight.
- F. Last Connected On:** The date and time the cart last communicated with N-Sight.
- G. Currently Connected:** Shows if the cart is currently connected to N-Sight, or if the cart isn't connected.
- H. MAC Address:** The network identifier of the cart's Wi-Fi adapter.  
N-Sight uses this to uniquely identify each Trio cart.
- I. Battery Level:** The cart's battery charge level, as last reported to N-Sight.
- J. Cart Groups:** The groups that the cart belongs to.  
You can add carts to groups in **Carts > Groups**.

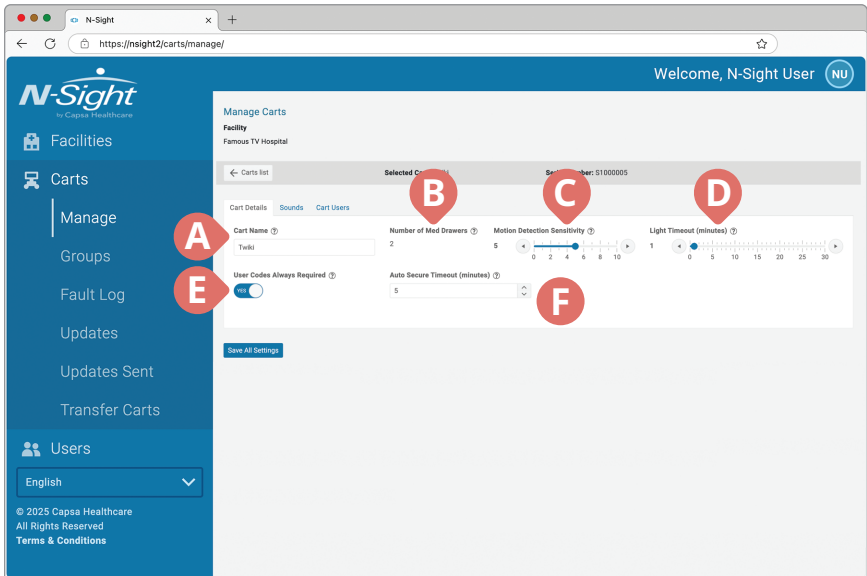
# CareLink M48



**Figure 9: CareLink cart details**

- A. Cart Name:** The common identifiable name of the cart.  
You can enter up to 250 characters, but the cart will only display about 20 characters.
- B. Device Profile:** A collection of settings that can be applied to the cart.  
You can create profiles in **Facility > Profiles**.
- C. Active:** When the cart is active, users assigned to the cart can log in to it with their PIN.  
When the cart is inactive, no user can log in to it.
- D. Comments:** General notes about the cart.  
This information isn't displayed on the cart.
- E. Last Connected On:** The date and time the cart last communicated with N-Sight.
- F. Currently Connected:** Shows  if the cart is currently connected to N-Sight, or  if the cart isn't connected.
- G. Battery Level:** Shows the cart's battery charge level, as last reported to N-Sight.
- H. Cart Groups:** Lists the groups that the cart belongs to.  
You can add carts to groups in **Carts > Groups**.

## Avalo



**Figure 10: Avalo cart details**

- A. Cart Name:** This is the common identifiable name of the cart. The cart name is limited to 20 characters.
- B. Number of Med Drawers:** The number of locking drawers on the cart.
- C. Motion Detection Sensitivity:** The sensitivity level of the cart's automatic re-lock motion detector. This feature may not be available for carts manufactured after 2021.
- D. Light Timeout:** The number of minutes that the cart's light will stay on after the cart is secured.
- E. User Codes Always Required:** For carts with a card scanner, this determines whether users need to enter their PIN before scanning their access card.
- F. Auto Secure Timeout:** The number of minutes of inactivity before the cart secures itself.

## Cart Users

The details for each cart includes a **Cart Users** tab. This tab lists all users assigned to the cart.

You can't add or remove users from this tab, but you can manage individual users; click the **Manage** button for the user, and N-Sight will take you to the **Manage Users** page for that user.



**IMPORTANT:** If you click **Manage** but haven't saved any changes you've made, those changes will be lost.

# Users

In N-Sight, there are two kinds of users: those who use the N-Sight software (called web users, who fill 5 different roles), and those who access medical carts (with the role **Cart User**).

All users have accounts created within N-Sight. For a web user, this account is what allows them to access N-Sight. For a Cart User, the N-Sight account is where a web user determines what carts the Cart User can access, and what they can do on each type of cart.

Usually web users don't access carts, and Cart Users don't log in to N-Sight, but if you need to you can set it up so that individuals can access both.

## User roles

There are six roles that users can have, and you can assign any (or all) roles to any user.

- **Cart Admin:** (web user) They use N-Sight to review cart status and update cart information.
- **Cart User:** They use a cart in their daily work and they're typically medical personnel.

Users with just the **Cart User** role don't have N-Sight access.

If you add the **Cart User** role to a person with a web user role who shouldn't be able to access secured storage or medication drawers, see **Restricting non-medical user access** on page 32.

- **Facility Admin:** (web user) They use N-Sight to manage and review all aspects of a facility.

This is the highest level of permissions granted within a designated facility.

- **Messaging Admin:** (web user) They can only review and change messaging options.
- **N-Sight User:** (web user) They use N-Sight to access information about the carts and users in the **Dashboard** and **Analytics** work areas.
- **User Admin:** (web user) They use N-Sight to create and manage Cart Users.



**IMPORTANT:** Only a **Facility Admin** or **User Admin** can add or import users to N-Sight.

## Adding users manually

To add a user:

1. Click **Users > Create**.
2. Enter the user's **First Name** and **Last Name**.

3. Enter a unique **User Name** for the user.

**NOTE:** Once you've created a user, their **User Name** can't be changed.



**IMPORTANT:** You can enter an email address as the **User Name**, but this isn't used to contact the user; the information in the **Email** field is used for contact. (They can be the same.)

4. Enter the user's **Email** address.

This is required for anyone who will have one of the 5 web user roles. You don't need to enter an email address for Cart Users.

5. Click **Add facility access**.

This adds a **Facility** row to the table below the button.

6. Click the menu in the **Facility** column and choose a facility.

7. Click in the **Roles** column and choose a role from the menu.

You can add multiple roles for the user; just click the **Roles** menu again and select another role.

8. Once you've selected a facility and one or more roles for the user, click **Add**.

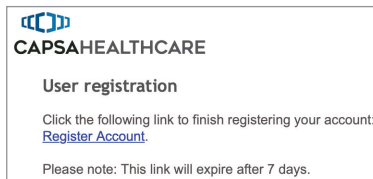
You can continue to add facility and role combinations for the user.

9. When you've finished adding facilities and roles for the user, click **Create User** below the facility access table.

Once you've created the user, N-Sight will take you to the user's details page in **User > Management**.

## User registration

When you create a new user with any of the web user roles (see **User roles** on page 21), N-Sight automatically sends them a registration email. The email is from "Capsa Healthcare <do-not-reply@CapsaHealthcare.com>" with the subject "User registration." It includes a link where they can register their account. They need to do this within 7 days or the link will expire.



**Figure 11: User registration email**



**TIP:** You may want to let your users know that this email is coming so they can look for it and check their junk or spam folder if necessary.

To register, the user will be prompted to select a security question, provide the answer, then create a password.

The first screenshot shows the 'User Registration' page for CAPSAHEALTHCARE. It features a progress bar with two steps: 'Security Questions' (active) and 'Password'. Below the progress bar, the user has entered their 'Username' as 'doug.ross@tvhospital.net', selected a 'Security Question' from a dropdown menu ('What was the make of your first car?'), and provided an 'Answer' of 'The bus'. A blue 'Next' button is at the bottom.

The second screenshot shows the 'User Registration' page for CAPSAHEALTHCARE. It features a progress bar with two steps: 'Security Questions' and 'Password' (active). Below the progress bar, the user is prompted to enter a 'New Password' and 'Re-type New Password', both shown as masked text (dots). A blue 'Complete Registration' button is at the bottom.

When the user clicks **Complete Registration**, they will be logged in to N-Sight.



**IMPORTANT:** Make sure the user records their password and security question.

If a user doesn't respond to the registration email, or later changes their email address, a **Cart Admin**, **Facility Admin**, or **User Admin** can have N-Sight send a new registration email.

## Importing Cart Users

Creating a large number of individual Cart Users can be time consuming.

To help speed up the process, you can create an Excel file to import Cart User information into N-Sight.

To download a template for the import list:

1. Click **Users > Import**.
2. Click the **Facility** menu and choose the facility to add users to.  
Although not necessary for downloading the import template, you need to select the correct facility before you import your users.
3. Click the **Device Type** menu and choose which type of cart you'll import users for.

**NOTE:** Each type of cart uses a different template, so be sure to download the correct one.

4. Click **Get Template**.

The template file will be saved to your Downloads folder.

Open the template, enter information for each Cart User that you want to import, then save the file.

**TIP:** For settings shown as Boolean, you can enter T, True, On, the digit 1, or Yes to turn the setting ON, or enter F, False, Off, the digit 0, or No to turn the setting OFF.

## Trio and CareLink M48 import templates

The Trio and CareLink import templates are the same, except that Trio adds a column for **Witness**.

	A	B	C	D	E	F	G	H	I	J	K
1	User Name	First Name	Last Name	Department	Status	Lockout Override	IT Services Menu	Drawer Access	Comments	PIN	Witness
2											
3											

- A. User Name:** A name that uniquely identifies each person in the facility.
- B. First Name:** The user's first name.
- C. Last Name:** The user's last name.
- D. Department:** (Optional) The department, or primary department, the user works in within the facility.  
Add department names to N-Sight in **Facilities > Departments** before using them in the import file.
- E. Status:** (Boolean) When True, the user is Active and can log in to an assigned cart; when False, the user is Inactive.
- F. Lockout Override:** (Boolean) When True, this allows a user to log in even if a cart has been locked out.  
This is normally set to True for Managers so they can reset the cart to accept PINs after a lockout has occurred.
- G. IT Services Menu:** (Boolean) Allows the user to access the IT Services menu on the cart.  
This should only be set to True for IT staff.
- H. Drawer Access:** (Boolean) When True, this allows the user to access locked drawers on the cart.
- I. Comments:** (Optional) Comments or additional information related to the user.
- J. PIN:** The numeric code the user needs to access the cart.  
The length of the PINs you enter must match the facility PIN length as set on the **PINs** tab in **Facilities > Manage**.
- K. Witness:** (Boolean; Trio only) This allows the user to enter their PIN to give another user access to a second locked drawer.  
For details about the Witness Authorization setting, see **User settings for Trio and CareLink** on page 30.

**NOTE:** Even if your Trio cart does not have the optional second locked drawer, you need to specify the **Witness** setting.

## Avalo import template

	A	B	C	D	E	F	G	H	I
1	User Name	First Name	Last Name	Status	Narc 1 Drawer Access	Narc 2 Drawer Access	PIN	Secondary PIN	Prox Card ID
2									
3									
4									

- A. User Name:** A name that uniquely identifies each person in the facility.
- B. First Name:** The user's first name.
- C. Last Name:** The user's last name.
- D. Status:** (Boolean) Determines whether a user is Active (can log in to a cart) or Inactive.
- E. Narc 1 Drawer Access:** (Boolean) Allows the user to access the first locked drawer on the cart.
- F. Narc 2 Drawer Access:** (Boolean) Allows the user to access the second locked drawer on carts that have them.
- G. PIN:** The numeric code the user needs to access the cart.  
The length of the PINs you enter must match the facility PIN length as set on the **PINs** tab in **Facilities > Manage**.
- H. Secondary PIN:** The code the user needs to unlock the medication drawers on the cart.
- I. Prox Card ID:** The code from the user's scannable card.

## Importing the Excel file

1. Click **Users > Import**.
2. Click the **Facility** menu and choose the facility to add the users to.
3. Click the **Device Type** menu and choose the type of cart you want to import users for.
4. Click **Select File**, then navigate to the file you want to import and click **Open**.

N-Sight will read the file and report any issues. You can correct those issues, save the import file, and try again.



**TIP:** If the only issue reported is "All PINs must be specified in the import spreadsheet AND be unique" then you can check **Generate PINs** to have N-Sight automatically assign all imported users a unique PIN.

5. Once all is correct, click **Review the Selected Users**.
6. N-Sight presents the **Import Users** dialog. Click **Start Import** to import the users.

Import progress will be shown in the window.

7. If there was a failure, click **Close** and review the import file.

Once the import completes successfully, click **Close** in the **Import Users** dialog.

You can modify any user setting except **User Name** from within N-Sight.

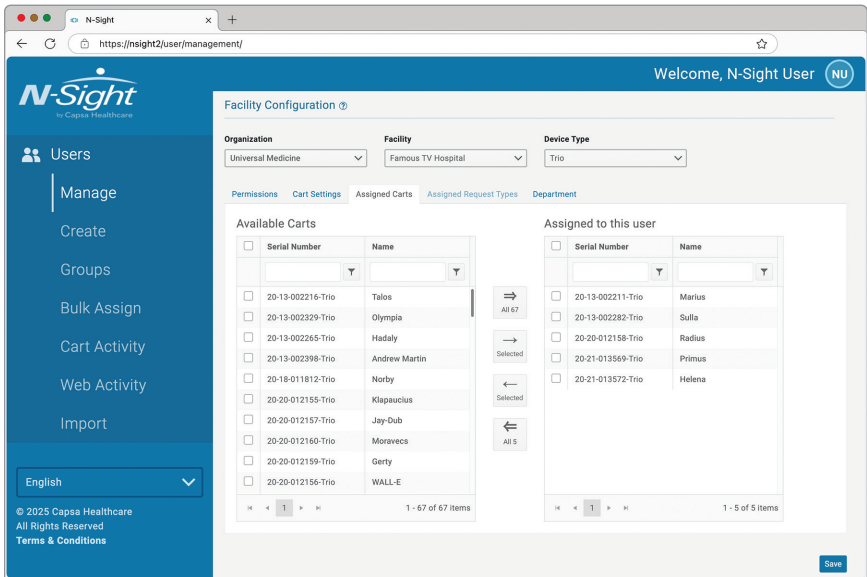
# Assigning carts to users

Cart Users can only use the carts that are assigned to them.

1. Click **Users > Manage**.
2. Click the **Facility** menu, then select a facility.
3. Click the **Select** button next to the user that you want to assign carts to.
4. Under **Facility Configuration**, click the **Assigned Carts** tab.

You may need to scroll the window to see the Facility Configuration section.

5. Click the **Device Type** menu and choose the type of cart that you want to assign to the user.
6. Select carts in the list of **Available Carts** on the left, then click **Selected**, or click **All** to add all carts to the list on the right.



7. Click **Save** to save the cart assignments for this user.

## Bulk Assign

You can use **Bulk Assign** to quickly assign multiple users to multiple carts.

1. Click **Users > Bulk Assign**.
2. Click the **Facility** menu and choose the facility where you want to assign users to carts.
3. Click the **Device Type** menu and choose the type of cart you want to assign to users.

#### 4. Click the **Select** button above the **Carts** list.

This shows the list of available carts and lets you select the carts to use for **Bulk Assign**.

#### 5. Select the **Available** carts that you want to assign users to.

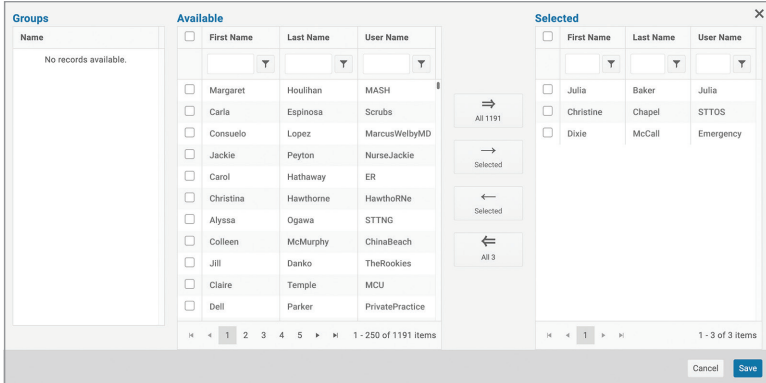
The **Available** carts list shows 250 carts at a time; to see more, use the page navigation below the list.

#### 6. When you've selected the carts for **Bulk Assign**, click **→ Selected**.

#### 7. Click **Save** to save the list and return to the **Bulk Assign** screen.

8. In the **Bulk Assign** screen, click **Select** above the **Users** list on the right.

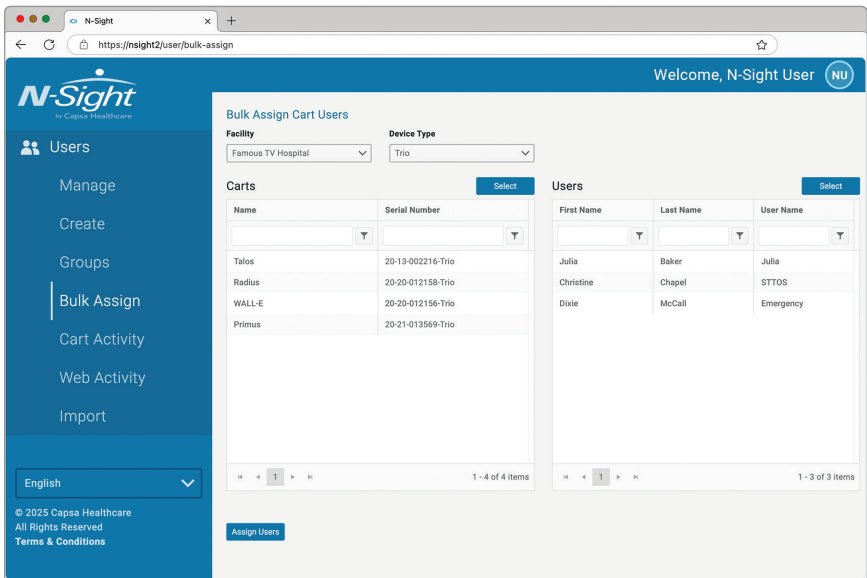
This shows the available Cart Users and lets you select users to **Bulk Assign** to the selected carts.



9. In the list of **Available** users, select those users that you want to assign to the selected carts.

10. When you've selected users for **Bulk Assign**, click **→ Selected**.

11. Click **Save** to save the list and return to the **Bulk Assign** screen.



12. When you're ready to perform the bulk assignment, click **Assign Users**.



## User cart settings

You can change each user's settings for different cart types to accommodate how they interact with those carts.

User cart settings are located at the bottom of the **User Management** page.

1. Click **Users > Manage**.
2. Click the **Facility** menu and select a facility.
3. Click the **Select** button next to the user you want to modify.

Users with the role Cart User have a  in the **Cart User** column.

Cart User	N-Sight User	Email	First Name	Last Name	User Name
Select			J. Peyton	Jackie	Peyton
		j.peyton@tvhospital.net			NurseJackie

4. To change the user's **Active** status, check or clear the box labeled **User Active** under **General Details**.

User Management

[← Users List](#)

General Details [⌵](#)

First Name	Last Name	User Name	Email
N-Sight	User	NSightUser	nrsight_user@tvhospital.net
Prox Card Id	Comments		User Active <a href="#">?</a>
			<input checked="" type="checkbox"/>

For Cart Users, the **User Active** setting acts as a switch that determines whether they can access any carts at all. For web users, this determines whether the user can log in to N-Sight.



5. Under **Facility Configuration**, click the **Device Type** menu and choose the device you want to see the details for.

Facility Configuration [?](#)

Organization	Facility	Device Type
Universal Medicine	Famous TV Hospital	Trio

Permissions [Cart Settings](#) [Assigned Carts](#) [Assigned Request Types](#) [Department](#)

Roles

Cart User  

6. Go through the available settings tabs and make any changes required, then click **Save** at the bottom of the workspace. (You may need to scroll to see the **Save** button).



**IMPORTANT:** If you leave the **Manage Users** screen by clicking in the menu on the left or by clicking **Users List** at the top of the workspace, you'll lose any changes that you've made. Be sure to click **Save** before exiting the workspace.

## User settings for Trio and CareLink

The user's **Cart Settings** options are similar for Trio and CareLink M48 carts. Trio carts have an additional setting, **Witness Authorization**, that is not present for CareLink carts.

- A. Cart User Active:** Determines whether the user is allowed to log in to the selected cart type.  
If the **User Active** setting under **General Details** is turned off, the user won't be able to log in to any carts, regardless of the **Cart User Active** setting.
- B. Can Override Lockouts:** With this turned on, this user can log in to a cart that has been locked when someone attempted to access the cart with an invalid PIN more times than are allowed.  
See **PINs** on page 13 for details on setting the lockout option.
- C. Has Storage Access:** This allows the user to access locked drawers on carts that have them.  
This is normally turned Off for Cart Users that are IT staff.
- D. Can Access IT Menus:** This Cart User will have access to the IT function menus on the cart.  
Usually this is reserved for IT staff that might need to change settings by physically accessing the cart.  
IT staff usually don't have the **Has Storage Access** or **Witness Authorization** (on Trio) settings turned on because those settings give access to areas of the cart used by medical staff.

- E. Witness Authorization:** (Trio only) This allows the user to grant a different user access to a cart's second set of locked drawers. In order for any user to access the second set of drawers, they must have the **Has Storage Access** setting turned on, and have another user with the **Witness Authorization** setting enter their PIN to grant them access to the second set.

A user with **Has Storage Access** and **Witness Authorization** can't "witness" their own attempt to access the second set of locked drawers. This means that two users must be present to access the second set of drawers.

This is normally turned Off for Cart Users that are IT staff; generally, accessing the medical drawers should only be done by medical personnel.

**NOTE:** The second set of locked drawers is frequently used to store narcotics or other sensitive materials; it's generally considered more secure to have two medical staff required to access them.

- F. PIN code:** This shows the user's PIN.

To assign a new PIN, click **Generate PIN**. N-Sight will choose a new, unique PIN for the user.



**IMPORTANT:** When you're done making changes, click **Save** at the bottom of the workspace. You may need to scroll further down to see the **Save** button.

## User settings for Avalo

Facility Configuration ⓘ

Organization: Universal Medicine | Facility: Famous TV Hospital | Device Type: Avalo

Permissions | Cart Settings | Assigned Carts | Department

**A** Cart User Active? ⓘ

**B** Narc 1 Drawer Access? ⓘ  NO

**C** Narc 2 Drawer Access? ⓘ  NO

**D** PIN code: 0760

**E** Secondary PIN code: 1473

- A. Cart User Active:** Determines whether the user is allowed to log in to Avalo carts.

If the **User Active** setting under **General Details** is turned off, the user won't be able to log in to any carts, regardless of the **Cart User Active** setting.

- B. Narc 1 Drawer Access:** This determines whether the user is allowed to access the first locked narcotics drawer on the cart. To unlock the drawer, the user enters their secondary PIN.

- C. Narc 2 Drawer Access:** This determines whether the user is allowed access to the secondary locked narcotics drawers. To unlock the drawer, the user enters their secondary PIN.

**NOTE:** These settings apply to the user for all Avalo carts they're assigned to. Carts can have zero, one, or two sets of electronically locked narcotics drawers.

- D. PIN code:** This is the code the user enters to access the cart. To assign a new PIN, click **Generate PIN**. N-Sight will choose a new, unique PIN for the user.
- E. Secondary PIN code:** This is the code that the user enters to unlock narcotics drawers that they have access to. To assign a new PIN, click **Generate PIN**. N-Sight will choose a new, unique PIN for the user.



**IMPORTANT:** When you're done making changes, click **Save** at the bottom of the workspace. You may need to scroll further down to see the **Save** button.

## Assigned Carts

This shows the carts of the selected type that a user is assigned to, and lets you add or remove carts.

For details on changing the carts assigned to a user, see **Assigning carts to users** on page 26.

## Restricting non-medical user access

You may assign the **Cart User** role to give cart access to people who shouldn't be able to access secured storage or medication drawers on the cart.

For these users, you should change the following settings; see **User cart settings** on page 29.

### Trio and CareLink M48 settings

- **Has Storage Access:** Off

This means the user can't access the locked drawers on the cart.

- **Witness Authorization:** (Trio only) Off

This means the user won't be able to authorize access to the second locked drawer for another user.

Although not necessary to restrict access to secured storage, you may also want to change these settings:

- **Can Override Lockouts:** On

Turn this On to allow the non-medical user to access the cart even if it has been locked from failed login attempts.

- 
- **Can Access IT Menus:** On

Turn this on to allow the non-medical user to access the IT menus on the cart. (This may be the whole reason this user has cart access.)

## Avalo settings

These two settings directly determine whether the user can access the locked drawers on the Avalo cart.

- **Narc 1 Drawer Access:** No
- **Narc 2 Drawer Access:** No

# Updating Trio

Trio software is regularly updated for security, improvements, and bug fixes.

There are three ways to update Trio carts:

- You can have N-Sight send available updates to some or all of your carts simultaneously.

This requires that each cart has CCS 2.54 or later.

- You can update a specific cart from the cart itself.

This requires that the cart has CCS 2.90 or later.

- You can download the current CCS (main logic board) firmware and install it to the cart from a USB drive.

This does not update the other three Trio firmwares.



**IMPORTANT:** When you update a Trio, nobody can log in to the cart, and it will download and install software and restart when needed. You should take the carts that you are going to update out of service so nobody can inadvertently interfere with the update.

There are as many as four different firmware types on Trio carts that can be updated. These are:

- **CCS Board:** The main Trio logic board, which includes the Trio operating software.
- **Distribution Board:** The Trio power distribution board, which manages battery consumption.
- **Locking Board:** The logic board for the drawer locking mechanism(s).  
Not all Trio carts have electronic drawer locks, and so don't have this board.
- **Task Light Board:** The logic board for the task light.  
Not all Trio carts have a task light, and so don't have this board.

## Update Trio carts from N-Sight

To see the firmware updates available for your Trio carts:

1. Sign in to N-Sight.
2. Click **Carts > Updates**.

**NOTE:** Only Cart Admin and Facility Admin users can access the **Update Cart Software** workspace.

3. Click the **Facility** menu and choose your facility.
4. Click the **Device Type** menu and choose **Trio**.

The **Available to Update** list on the left shows all Trio carts that have at least one firmware that has an update available. If the list is empty, then all carts are up-to-date.

**Display Mode**  
 Cart Name  Serial Number

**Available to Update**

<input type="checkbox"/>	Cart Name	v					
<input type="checkbox"/>	24-029066-TRIO	2.90	✓		✓	-	⇒ All 16
<input type="checkbox"/>	22-015909-TRIO	2.64		-	-	-	→ Selected
<input type="checkbox"/>	22-015910-TRIO	2.64		-	-	-	
<input type="checkbox"/>	22-015911-TRIO	2.64		-	-	-	← Selected
<input type="checkbox"/>	22-015912-TRIO	2.64		-	-	-	
<input type="checkbox"/>	23-022105-TRIO	2.74				✓	
<input type="checkbox"/>	23-022106-TRIO	2.74				✓	
<input type="checkbox"/>	23-022107-TRIO	2.74				✓	
<input type="checkbox"/>	23-022108-TRIO	2.74				✓	← All

1 - 16 of 16 items

Up To Date (1) Update Pending (0)

- The first column shows the cart name or serial number.  
To change which is displayed, click **Cart Name** or **Serial Number** under **Display Mode** at the top center of the workspace.
- The second column v shows the version of the main Trio firmware.
- The third column shows the status of the main Trio firmware.  
 ✓ means the firmware is up-to-date.  
 means there is an update available for the firmware.  
 — means the feature is not present on this cart.
- The fourth column shows the status of the power distribution firmware.
- The fifth column shows the status of the task light firmware.
- The sixth column shows the status of the lock firmware.



#### TIP

To see a list of carts that are up to date, click the **Up To Date (#)** button below the **Available to Update** list.

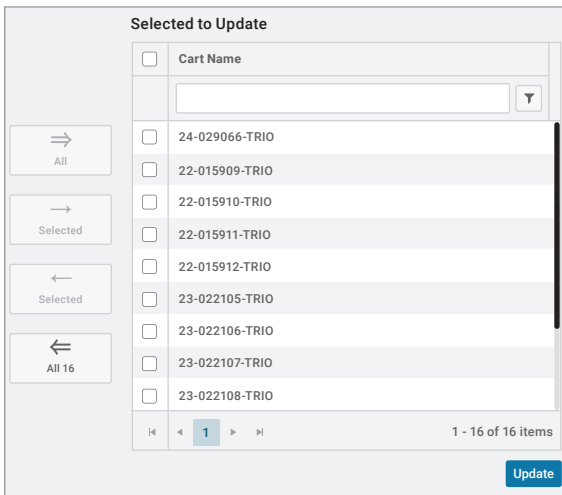
This opens a window listing all the carts and their connection states. (The number on the button shows how many carts are up to date.)

Click **Close** at the bottom right of the window to return to the **Update Cart Software** workspace.

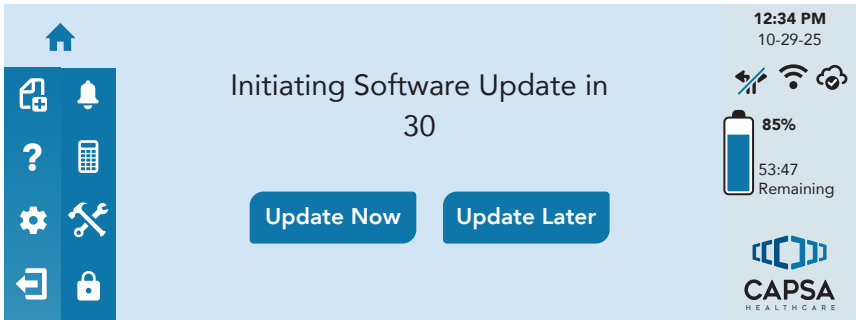
## Sending the updates

When you update carts, they will be updated to the latest version of the firmwares that are available.

1. Move carts from the **Available to Update** list on the left to the **Selected to Update** list on the right.
  - To move all available carts, click  $\Rightarrow$  **All**.
  - To move only some of the available carts, check the box to the left of each cart name or serial number, then click  $\rightarrow$  **Selected**.
2. When you have added carts to the **Selected to Update** list, click the **Update** button below the list.



Before each firmware update is downloaded on a cart, the cart will display a 30 second countdown, with options to **Update Now** or **Update Later**.



If you update your carts unattended, the countdown will end and the update will proceed.

**NOTE:** Updates will not start on a cart until any logged in user logs out. To log out, tap  $\leftarrow$  on the cart screen.

- If you tap **Update Now** on a specific cart, the countdown will end immediately and the update will proceed *on that cart*.  
Other carts will continue their own process.
- If you tap **Update Later**, this update and any subsequent pending updates will be postponed *on that cart only*.  
The next time that the cart syncs with N-Sight, the 30 second countdown will begin again, and the update process will resume. (Carts normally sync automatically about every 10 minutes.)

3. N-Sight will send available firmwares to all carts simultaneously, but in sequence.

First it will send the latest CCS Board firmware to all selected carts that need it.

After the CCS Board update is applied, the Trio cart will restart. After a brief delay, the 30 second countdown will start, followed by the next required update.



**IMPORTANT:** If some carts do not require some firmware updates, they will sit idle until their next required update is sent by N-Sight.

**DO NOT** put any carts back in to service until all the updates are complete!

4. When the CCS Board updates are complete, N-Sight will send the latest Distribution Board firmware to the selected carts that need it.

When this update is complete, the cart will show the message **Updating Accessory Boards Complete** with a **Close** button. The 30 second countdown starts in the background. You can tap **Close** to close the **Updating Complete** message and see the **Countdown** screen.

5. After this, N-Sight will send the latest Locking Board firmware to the selected carts that need it.
6. Finally, N-Sight will send the latest Task Light Board firmware to the selected carts that need it.

**REMEMBER:** You can leave carts unattended as they are updated. Each cart will receive each update that it requires and go through the 30-second countdown for each update without intervention.

## Requesting updates from a Trio cart

Starting with CCS firmware version 2.90, a user on a Trio cart can request firmware updates. The cart must be connected to N-Sight.


1. Log in to the cart.

Log in using either a **Cart User** account with IT Menu access (see **D. Can Access IT Menus** on page 33), or using the **Facility IT Admin PIN** (see **F. Facility IT Admin PIN Code** on page 14).

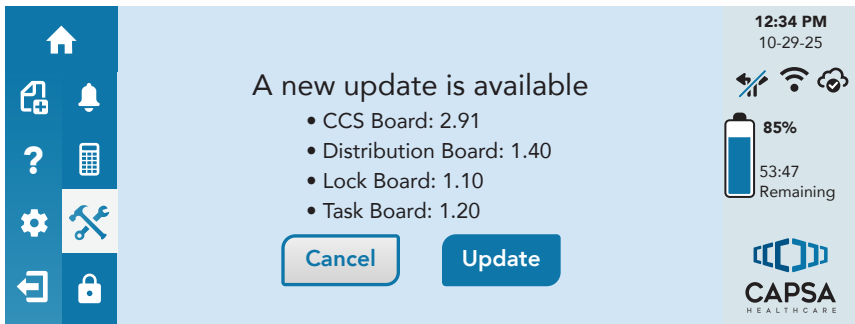
2. Tap  **Tools**.

3. Tap **Software Update**.

4. Tap **Check for Updates**.

If no updates are available, you'll see the message **Already up to date**. Tap  **Home** to return to the main screen.

If there are updates available, they'll be listed in the order in which they'll be installed. The possible updates are listed on page 34.



Tap **Cancel** to return to the **Software Update** menu, or tap **Update** to start the update process.

When you tap **Update**, you can let the update proceed unattended, or you can watch for prompts on the screen.

The first prompt will remind you to log out of the cart. Tap **OK** to log out, or wait and the cart will automatically log out after several seconds.

Before each firmware update, the cart will display a 30 second countdown.

You can leave the cart unattended, and each update will be completed automatically, or during each countdown, you can tap:

- **Update Now** to start the update immediately.
- **Update Later** to hold the update until the cart automatically synchronizes with N-Sight. (Carts normally sync every 10 minutes.)

If there is a CCS Board firmware update, the Trio cart will restart after the update is completed. If there is another update to apply, the cart will start the next 30 second countdown.

After each accessory board firmware update, the cart will display an **Updating Complete** message with a **Close** button. The 30 second countdown for the next update (if any) will begin in the background; tap **Close** to view the countdown, or wait for the countdown to complete and the cart will start the next update.

When the final update has completed, the cart will display the **Home** screen and be ready for a user to log in.

**REMEMBER:** You can leave a cart unattended as it is updated. The cart will receive each update that it requires and go through the 30-second countdown for each update without intervention.

## Updating Trio main logic board via USB

**NOTE:** Contact Capsa Healthcare Technical Support at 800.243.2465 or [TechSupport@CapsaHealthcare.com](mailto:TechSupport@CapsaHealthcare.com) for assistance with this procedure.

To download the latest CCS firmware update for your Trio carts:

1. Sign in to N-Sight.
2. Click **Carts > Updates**.

**NOTE:** Only Cart Admin and Facility Admin users can access the **Update Cart Software** workspace.

3. Click the **Facility** menu and choose your facility.
4. Click the **Device Type** menu and choose **Trio**.
5. At the far right of the window, near the top, click **Manual CCS Update**.

This opens a window with basic instructions for downloading and installing the firmware.

The bottom of the window shows the firmware version and file size.



**TIP:** Copy the instructions or take a screenshot. Follow the on-screen instructions if they vary significantly from these.

6. Click **Download** to download the firmware as a **.ZIP** file.

The file is saved to your browser's Downloads folder.



**IMPORTANT:** If your browser automatically extracts the contents of compressed files, be sure to retrieve the original **.ZIP** file and delete the extracted folder.

7. Copy the **.ZIP** file to the root directory of a FAT32-formatted USB thumb drive.

Use a thumb drive, and not a bus-powered hard drive; the cart doesn't supply enough power for a hard drive to function reliably.



**IMPORTANT:** The current CCS firmware file should be the only file at the root of your USB drive. You can move any other files into folders on the drive.

8. Plug the USB drive into the cart's USB service port.

The service port is under the work surface at the back of the compartment.



9. Log in to the cart using either a **Cart User** account with IT Menu access (see **D. Can Access IT Menus** on page 33), or using the **Facility IT Admin PIN** (see **F. Facility IT Admin PIN Code** on page 14).

10. Tap  **Tools**.

11. Tap **Software Update**.

12. Tap **Update CCS Board**.

The update will start, and the cart will display a progress bar and a description of what is happening.

When the update is completed, you can confirm the CCS firmware version.

1. Tap  **Tools**.

2. Tap **Cart Information**.

3. Confirm that the **Main Board BSP Version** matches the firmware version that you installed.









# CAPSAHEALTHCARE

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8170 Dove Parkway  
Canal Winchester, OH 43110

**Support:** 800.243.2465 or [TechSupport@CapsaHealthcare.com](mailto:TechSupport@CapsaHealthcare.com)

**Online Support Request:** [www.CapsaHealthcare.com/service-support](http://www.CapsaHealthcare.com/service-support)

**Sales:** 800.437.6633 or [Info@CapsaHealthcare.com](mailto:Info@CapsaHealthcare.com)

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