Welcome to McKesson Connect Catalog

This Getting Started Guide will help you begin using your new access to McKesson Connect Catalog. We'll get you logged in to McKesson Connect and started in the right direction creating orders by looking up items. We'll also look quickly into Item Catalog, CSOS, Help/Tutorials, and logging out of McKesson Connect when you're done for the day.

Logging In to McKesson Connect

The first step for any user of McKesson Connect is to start your Internet browser, navigate to the McKesson Connect website and log in. This login ensures that your data is secure, and only authorized personnel are viewing and/or updating your information.

1. Open your Internet browser of choice (Netscape Navigator 6.2+, Internet Explorer 5.0+). Depending on your system setup, you may be able to double-click the browser icon on your desktop, or use the Start menu to open the browser.

2. Type your McKesson Connect URL into your browser's address bar and press the ENTER key on your keyboard. The login page displays, a part of which is shown to the right in Fig. 1. Note that the address may change slightly, but, most importantly, the 'http' is followed by an 's', indicating a secure site.

3. Click in the Enter User ID box and type the ID that was given to you when you registered for McKesson Connect. Many User IDs begin with 'ac' and have other letters and numbers after that, like this: acxxxxx where the x’s are replaced with your personal digits or characters. Other User IDs will begin with two characters that are indicative of the customer name.

**IMPORTANT: DO NOT PRESS THE ENTER KEY ON THE KEYBOARD, YET, AS THIS WILL ATTEMPT TO COMPLETE THE LOGIN, AS IF YOU HAD CLICKED THE ENTER> BUTTON.**

If you ever forget your password, type your User ID and click the Forgot your user ID / password? link to have your password sent to your e-mail address of record.

4. Press the TAB key on the keyboard, or click in the Password box.

5. Type in the Password given when you registered. As you type, the password will NOT display, but *** (asterisks/stars) display in the Password box to ensure the security of your password.

6. Click the Log In button or press the ENTER key on your keyboard. Note that the password disappears for security. The McKesson Connect Home page displays, with all modules for which you are registered available through the links at the top of the page and in the left-side navigation column.
Starting Catalog

Once you've logged in to McKesson Connect, you can navigate from any page to any module for which you've signed up. You can also maintain your user settings from the home page. This allows you to change your e-mail address and your login password. You can click the My Profile command in the McKesson Connect toolbar to access your user settings. Now, we'll look into the Catalog.

Click the Catalog tab within the Ordering module. Note that the Home and Catalog tabs (and others module tabs, if you have registered for them) remain throughout your session. This allows you to navigate to any of your modules quickly and easily, by clicking the appropriate tab. Also note that there's a Log Out button on the right side of the screen, which is accessible at any time (more on logging out later).

Item Catalog

The main function of the Item Catalog is to look up items and inquire on the stock status or item information (Catalog Search). There are also a Cost Change Report and a Physical Inventory section within the Item Catalog, which allow you to keep track of pricing changes on your items and your inventory levels. You may additionally have the Administration section which allows you to set up various automatic features and default settings for Catalog (and Ordering).

To look up items:

1. Once you've clicked the Catalog tab, the Catalog Search page and the Catalog toolbar display below the McKesson Connect tabs (see Fig. 3 on the next page). The Catalog Search form allows you to set criteria to look up items in your item catalog. The toolbar gives you access to the Catalog functions mentioned above.

2. If you have more than one Account for which you can look up items, you can pick the specific account from the Account drop-down list. This allows you to look up items for different accounts, as item information (pricing, specifically) may be different for each account.

3. You can look up items using many different data fields: McKesson Item #, NDC, UPC, Description, and many other specific fields, or by All search fields. You select the By method and type lookup criteria in the For box.
For instance, you can select the **Description** search method and type ZANTAC in the **For** box to look up all the Zantac items in your item catalog. For additional Search information, view the “Search Tips”.

4. You can also use the **Strength** and **Form** boxes to further limit the search results. You would type the appropriate **Strength** (such as 300MG) and/or **Form** (such as TAB) into the box to lookup items that match the **By** and **For** criteria, and the specified **Strength** or **Form**.

5. Once you have set the **Account**, **By** and **For** (and optionally the **Strength** and **Form** criteria), you click the **GO** button to display items meeting the criteria you specified.

The **SEARCH RESULTS** page displays your item lookup results.

![Fig. 4](image)

6. If you wish to check the inventory stock status (the amount on hand at the Distribution Center) for any item, click and type a value in the **Quantity** box and click the **CHECK INVENTORY** button at the bottom of the item list.

The **Inventory Results** column displays the stock status graphically with an icon (✔️ for sufficient quantity available, or a ❌ symbol for insufficient quantity available), while the **Available** column displays the quantity available (up to 100 - displays '>100' if you requested status on more than 100).

You can check stock status on more than one item on a single page by typing values in the **Quantity** boxes for more than one item. You CANNOT check the stock status for items on different **SEARCH RESULTS** pages at the same time. After checking the stock status, you can lookup other items and check their stock status.

**CSOS**

In order to use CSOS Ordering within McKesson Connect, you must go through the DEA CSOS enrollment process. More information can be found either on the DEA's site, [www.DEAecom.gov/](http://www.DEAecom.gov/), or on the "Resources" page within McKesson Connect. Once you’ve been accepted and the DEA has given you the necessary digital certificates and other
required information, you can place Schedule II controlled substances orders electronically in SMO without a paper form DEA-222. When you’re ready to set up your computer for CSOS Ordering, go to the “HELP” menu within SMO and click on “CSOS Setup and Ordering” for a guide. There’s more about HELP below.

If you are not yet on the CSOS program, you can still fill out a DEA-222 form and give it to your McKesson delivery driver. DEA-222 forms can be obtained from the DEA Division Field Office nearest you. For a national directory of the office locations, go to: www.deadiversion.usdoj.gov/offices_n_dirs/fielddiv/

Help and Tutorials

Each module within McKesson Connect contains a link to the online HELP and TUTORIAL files.

The help files are documentation that explain the use of all the features in the McKesson Connect modules and take the place of printed documentation. To access the Help files for any module, click the HELP button in the toolbar (line of buttons directly below the McKesson Connect tabs). The HELP button is typically on the far right side of the toolbar. You can navigate to various sections of the Help files by clicking the links on the left side of the Help window.

There is also a link to an online tutorial, which can be used to train new users in the many operations within Ordering and Catalog. The tutorial leads the user through step-by-step instructions for creating, preparing, and submitting orders, credit returns, and other features in Ordering. To launch the tutorial, click the TUTORIAL button in the toolbar (line of commands directly below the McKesson Connect tabs). The TUTORIAL button is the last command on the right side of the toolbar. Once started, you can navigate to any section or page of the tutorial using the TOPICS drop-down list.

Logging Out

Whenever you have completed a session in McKesson Connect, you should log out to maintain the security of the system. If you leave the system idle for an extended period of time (typically more than 30 minutes), the McKesson Connect system will automatically log you off. If you return and try to perform a function that requires access to the server, you are taken to the login page and must re-login to gain access again. For privacy and security, you should always log out if you are stepping away from your system for any amount of time. Once you’re logged out, no one can access the data you’ve viewed, because of the security features built in to McKesson Connect.

To manually log out from any page in McKesson Connect, click the Log Out command in the McKesson Connect banner. You are returned to the Login page and notified that you have been logged out. If you wish to re-enter McKesson Connect, simply type in your User ID and Password and click the Log In button.