Inventory Management System

User Manual

Last Edited 03/14/2022

Blue: R=0, G=54, B=99 Red: R=179, G=23, B=52

Contents

General Information

Purpose

The purpose of this manual is to provide instructions for using the new Inventory Management System for SVSU's Nursing Department. Use this manual as a guide for performing day-to-day and monthly inventory control procedures.

Contents

In addition to an overview explaining the functions of the application, this manual includes:

- Sample screen displays
- Data field characteristics
- Instructions and explanations for valid entries
- Pertinent examples
- Sample reports, lists, and inquiries

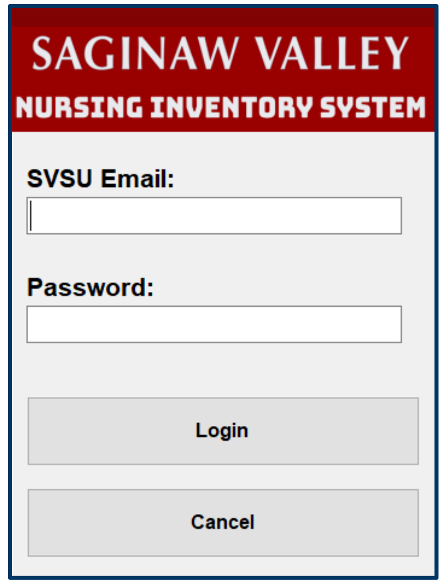
Conventions Used in This Manual

The following typeface conventions are used throughout this manual:

Bold	Bold text indicates an option to choose or text to type. It usually appears in numbered steps
Italics	Words are italicized for emphasis or to draw your attention to a new term
Action → Option Name	Whenever you see a reference to a menu option, the option is identified using the following notation: Menu Name → Option Name
➢ Arrows	Items with arrow bullet points are action items (e.g., “click the button”).
• Bullets	Items with circular bullet points provide information about steps in a process that don’t require action (e.g., “a pop-up window will appear”).

Login Screen

The first screen a user is presented with will be the *splash screen*, shown below in figure x.x, which is used to display the program booting up. Once the program has loaded, the user will see the *login screen*, shown below in figure x.x.



- To access the program, the user must enter their SVSU email address and their password, then click the **Login** button.
- Clicking the **Cancel** button will automatically close the program.

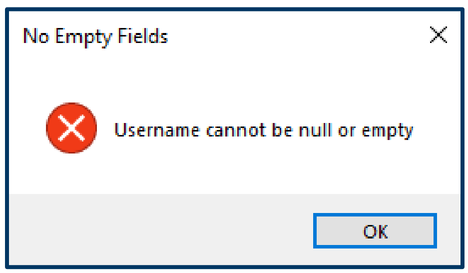
Note:

- The password used for this program is not associated with the password used in other SVSU applications. It is unique to this program.
- Users will be given a default password to use when they first access the system. They will then be prompted to create a new password that is at least eight characters long.

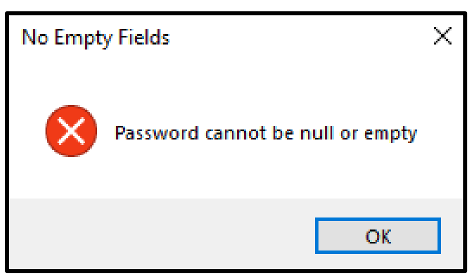
Login Screen Errors

From the login screen, the user can encounter a variety of error messages if invalid or incomplete credentials are entered. The following screenshots show all of the possible error messages a user could encounter:

- The error shown below in figure x.x occurs when the user leaves the SVSU email field blank.

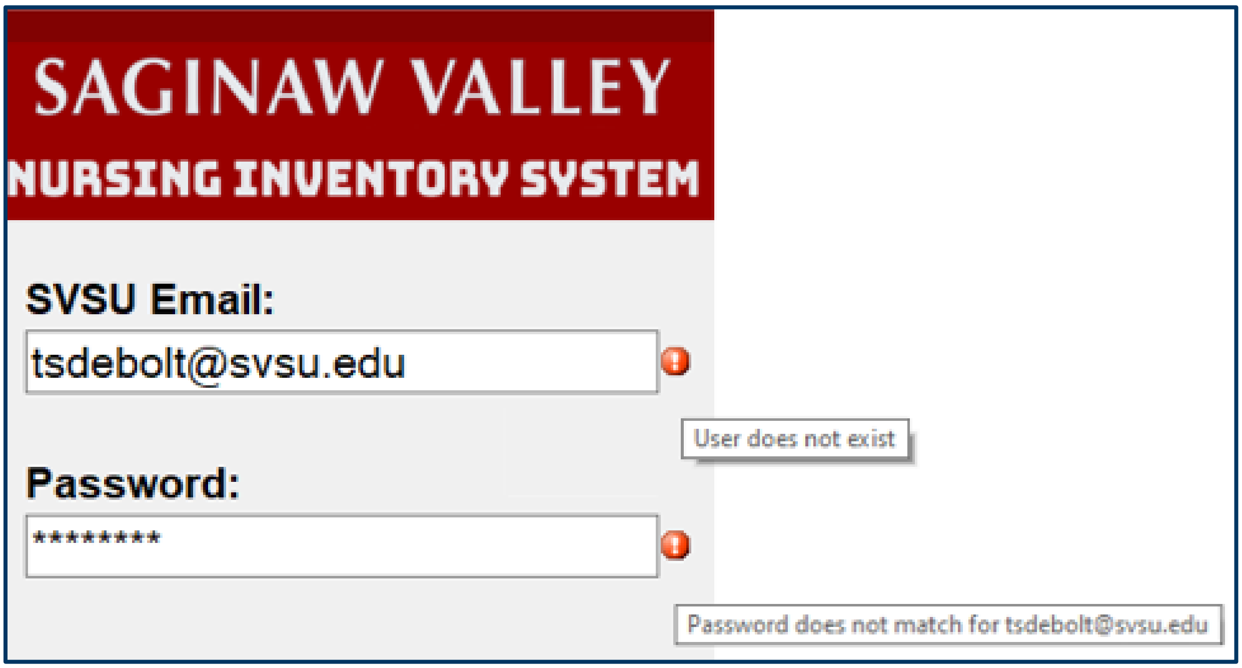


- The error shown below in figure x.x occurs when the user leaves the password field blank.



- Shown below in figure x.x are two possible errors for invalid credentials:
    1. *"User does not exist"* - The SVSU email entered is not registered in the program's user list. This means a user with administrative privileges will need to add the user before they can access the program

    2. *"Password does not match for xxx@svsu.edu"* - The password entered for the user is invalid. If a user has forgotten their password, they will need to ask an administrative user to reset their password.



Main Screen

Once a user has successfully logged in to the system, they will then see the *main screen*, as shown below in figure x.x. This screen will always be visible while a user is logged in and consists of three distinct parts:

1. Option Panel
2. Session Panel
3. Display Area

Option Panel

As denoted by arrow #1 in figure x.x on page x, the *Option Panel* is located on the left-hand side of the screen. There are six options the user can select from. A detailed description of what each option does and how to perform various operations will be given in the corresponding section of this manual. Clicking on one of the options will open a new screen within the *Display Area*, as denoted by arrow #3 in figure x.x on page x.

The six options are as follows:

1. Home
2. View Inventory
2. Manage Inventory
3. Generate Reports
5. Check-In/Out Items
6. Settings

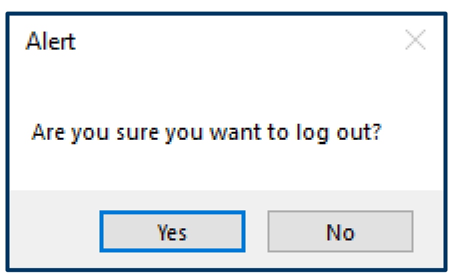
Session Panel

As denoted by arrow #2 in figure x.x on page x, the *Session Panel* is located in the top right corner of the screen and displays the following information:

- Current user's name
- The time and date the current user logged in at
- The current date and time
- The **Logout** button.

Once the user clicks the **Logout** button, they will receive a popup window, shown below in figure x.x, asking them if they want to log out.

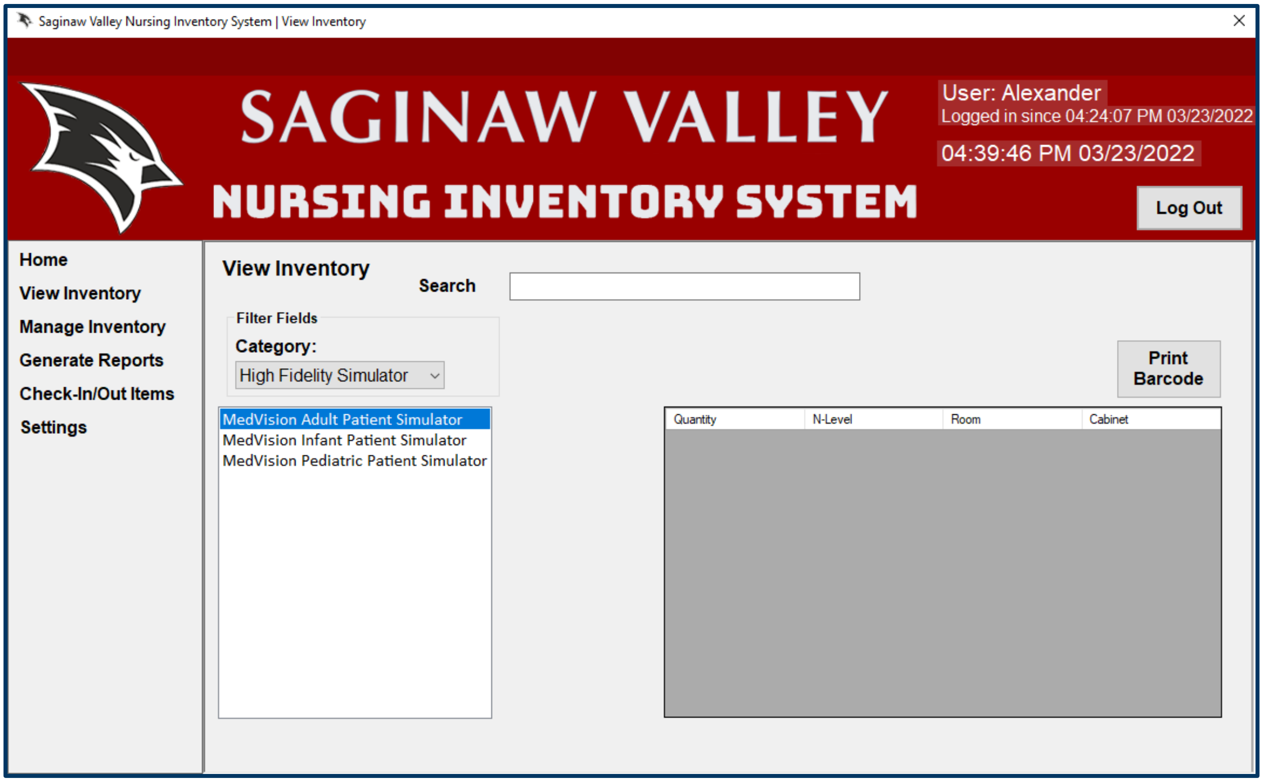
- If the user clicks **Yes**, they will be returned to the **Login Screen**, shown in figure x.x on page x.
- If the user clicks **No**, they will remain on the main screen.



Display Area

As denoted by arrow #3 in figure x.x on page x, the *Display* Area is the large box that takes up most of the screen. Upon selecting one of the options in the *Option Panel*, as denoted by arrow #1 in figure x.x on page x, a new screen will be displayed within this area.

An example is shown below in figure x.x. After selecting the **View Inventory** option, the new screen is displayed in the *Display Area*.



Home

The **Home** option will automatically be shown to users upon logging into the system. This screen greets the users and provides them general information about the program.

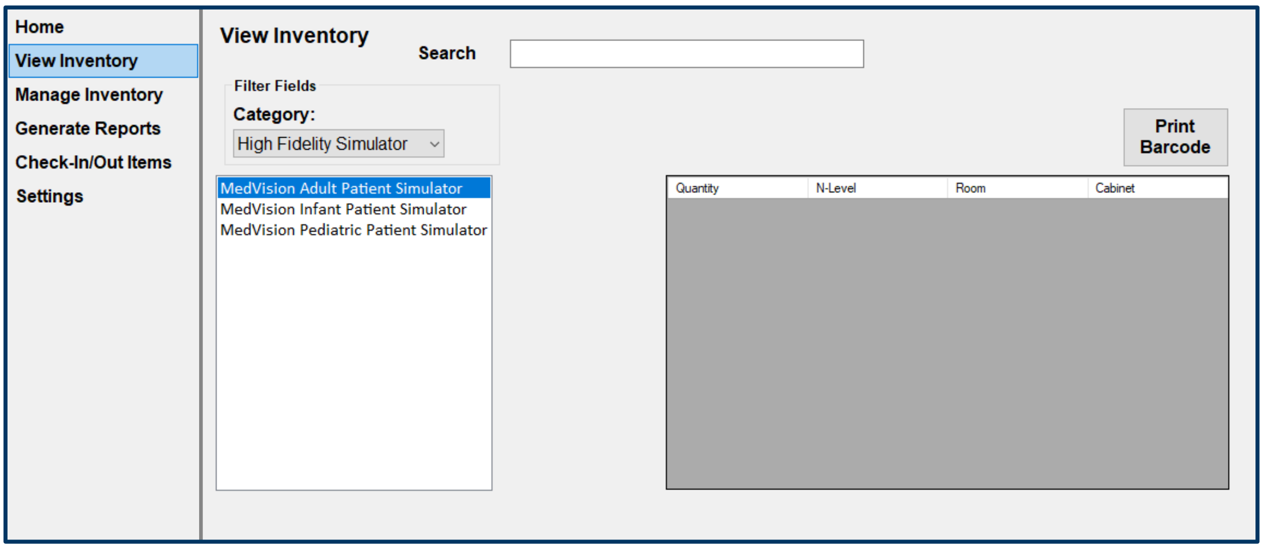
*****Screenshot when finished*****

*****See if they can add another button to bring up the printer user manual*****

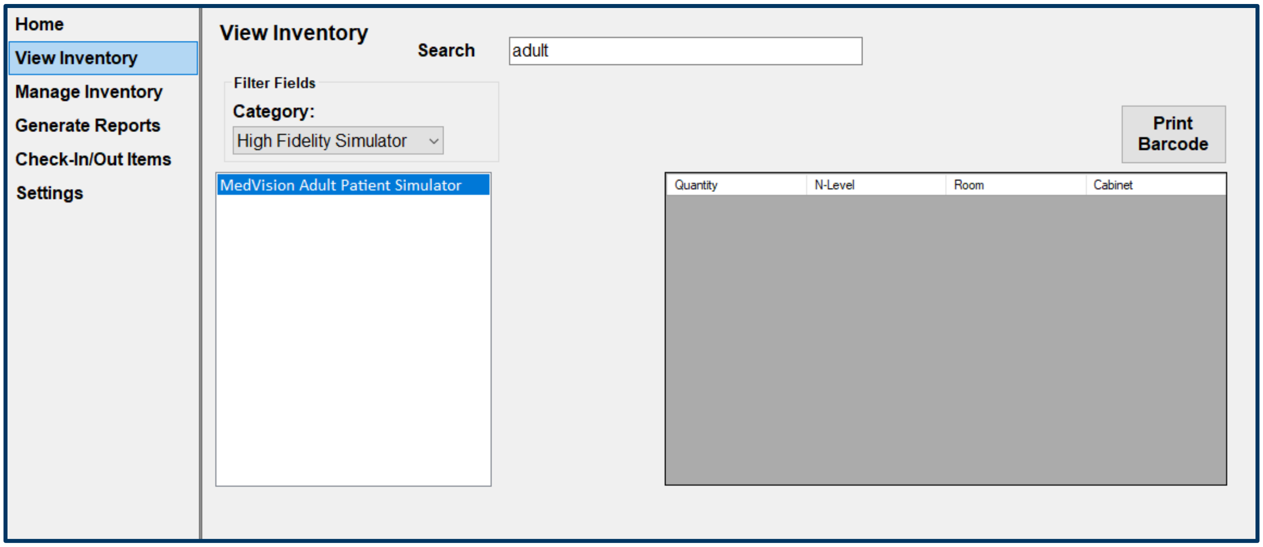
View Inventory

The **View Inventory** option allows the user to search for specific inventory commodity and view additional information about the commodity.

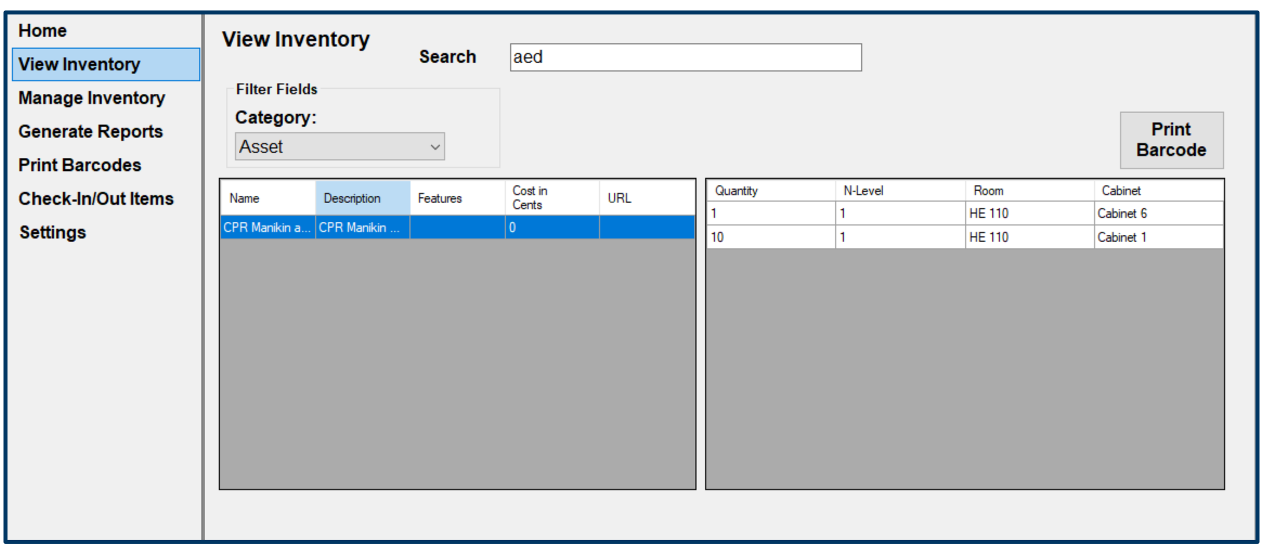
- To start, the user must select which **Category** they want to view. This will generate a list of all supplies in the specified category, which will be displayed in list on the left-hand output area. An example of this is shown in figure x.x on page x.



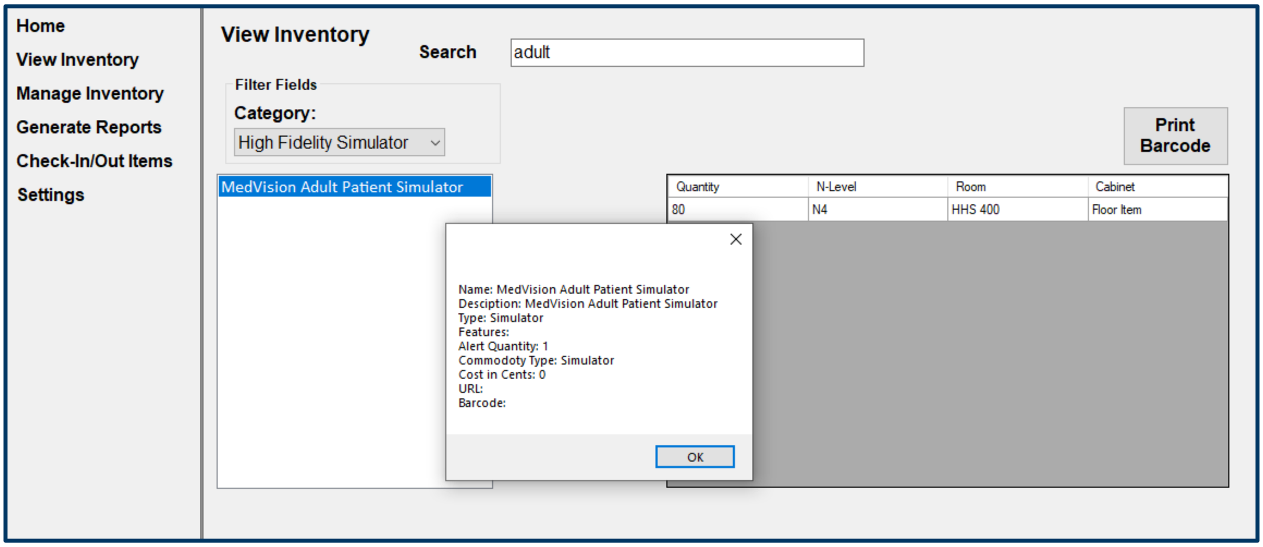
- The search results can then be further refined by using the **Search** field. Here the user will type the name of the commodity or a keyword, which will update the left-hand output area in real-time. An example of this is shown in figure x.x on page x.



- Upon clicking on the commodity one time, more information will be displayed in the right-hand output area, including location details, the quantity available, and the N-Level those supplies are reserved for. An example of this is shown in figure x.x on page x.



- Upon double clicking on the commodity, a popup window will appear containing more information about the selected commodity, including features, cost, alert quantity, etc. An example of this is shown in figure x.x on page x.



➢ The user also has the option to print a barcode for a selected commodity by clicking the **Print Barcode** button. An example of this is shown in figure x.x on page x.

*****Show screenshot of Print Barcode feature*****

Manage Inventory

The **Manage Inventory** option is used for all inventory management operations, except for checking in/out asset equipment. Here, the user will be required to choose which operation they would like to perform. A detailed description of what each operation does and how to perform various tasks will be given in the corresponding section of this manual. The five manage inventory options are as follows:

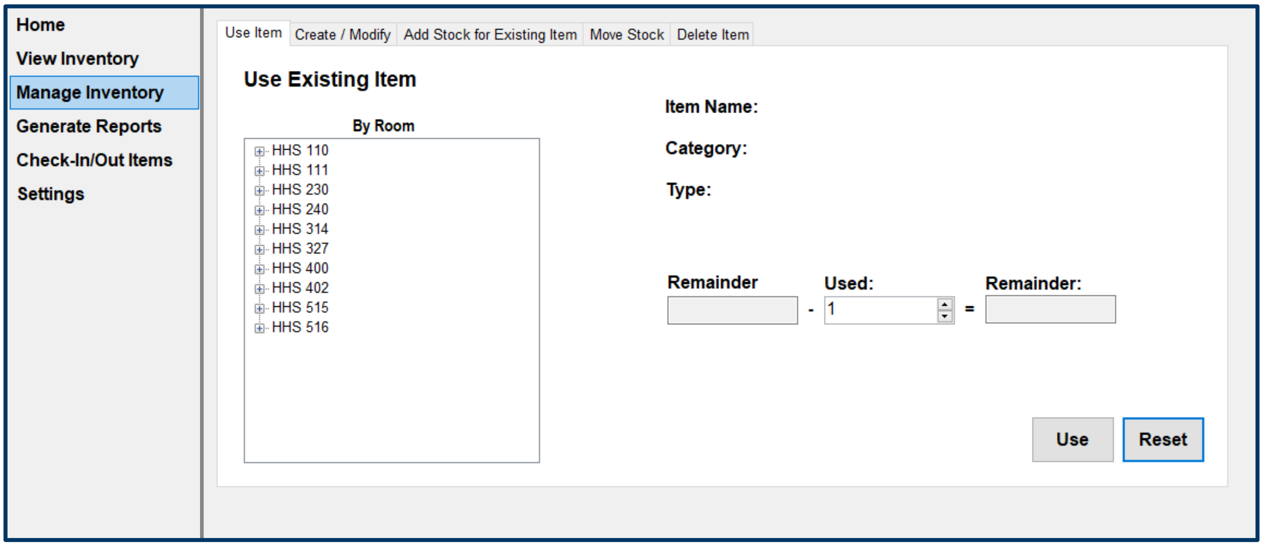
1. Use Item
2. Create / Modify
3. Add Stock for Existing Item
4. Move Stock
5. Delete Item

Use Item

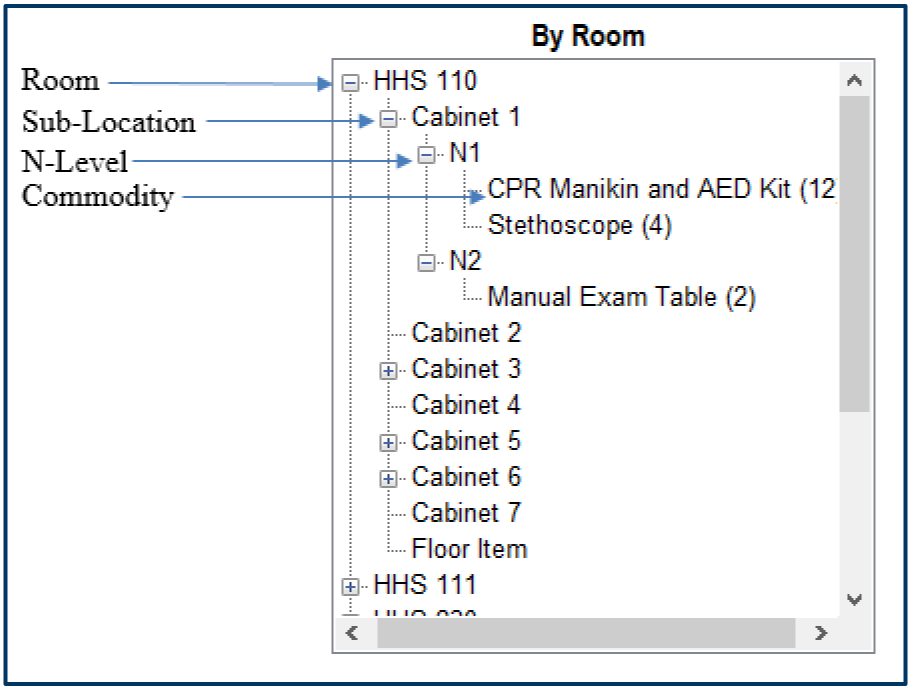
Manage Inventory → Use Item

This **Use Item** operation allows the user to consume a commodity from a selected location.

Shown below in figure x.x is the starting screen the user will see.



The *By Room* tree will display a list of all the rooms in the system. Upon selecting a room, all sub-locations for that room will be displayed. Any sub-locations that contain commodities will have a  icon beside them. Upon selecting a sub-location that has commodities, all the N-Levels in that sub-location will be shown. Upon selecting the N-Level, a listing of all the commodities reserved for that N-Level will be shown. An example of this is shown in figure x.x on page x.



To consume a commodity, the user must do the following:

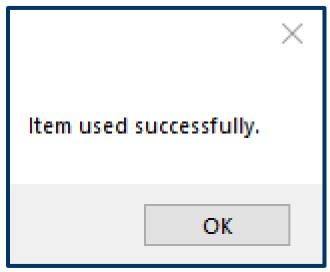
- Click the icon next to the room you are consuming from.
- Click the icon next to the sub-location you are consuming from.
- Click the icon next to the N-Level you are consuming from.
- Click the commodity you are consuming. This will then display the following information about the commodity:
    - **Item Name** – The Commodity's name.
    - **Category** – The category the commodity is associated with. *Ex: Asset, Consumable, High Fidelity Simulator, etc.*
    - **Item Type** – The subclass the commodity is associated with. *Ex: Equipment, Simulator, etc.*

- **Available** – Total quantity on-hand in the specified location.

➢ Enter the number you want to consume in the **Used** field. This will automatically calculate and display the new total in the **Remainder** field.

➢ Clicking the **Use** button will consume the commodity and generate a popup message to show it was successful, as shown in figure x.x on page x.

➢ Clicking the **Reset** button will clear the fields for the currently selected commodity.

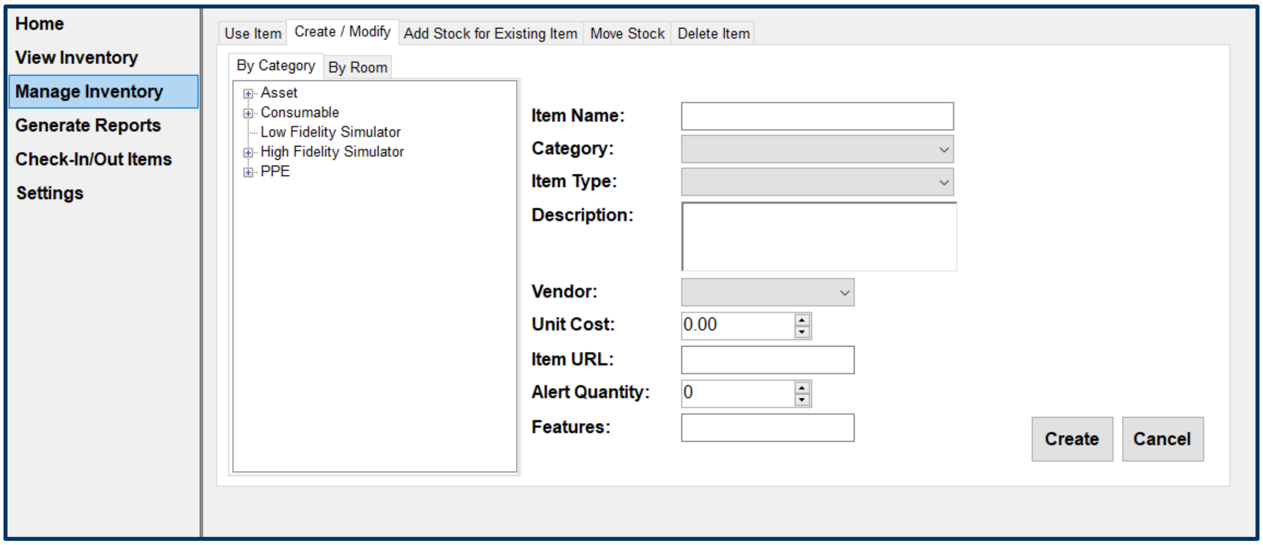


- *Note*: Items that are consumed are subtracted from the inventory totals. Simulators are not consumed; instead the user will input the number of hours the simulator was used for.

Create / Modify

Manage Inventory → Create / Modify

This **Create / Modify** operation allows the user to either create an entirely new commodity or modify an existing commodity. Shown below in figure x.x is the starting screen the user will see.

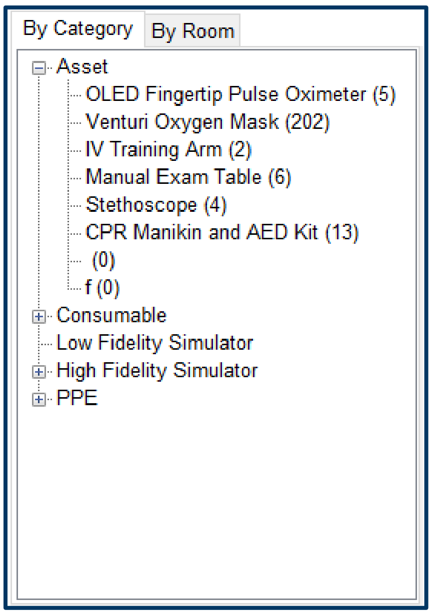


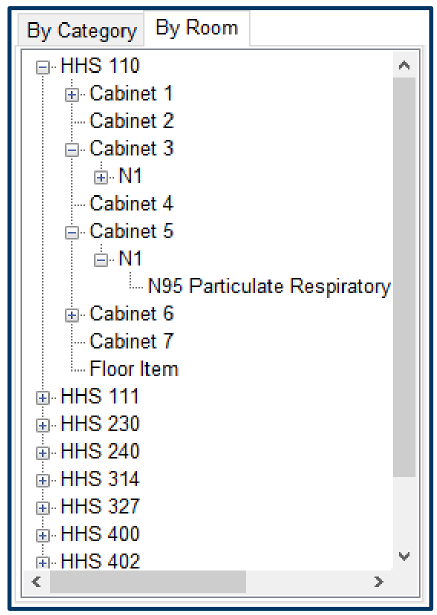
To create a commodity, the user must do the following:

- Enter the commodity information for the following required fields:
  1. **Item Name** – The Commodity's name
  2. **Category** – The category the commodity is associated with.
  3. **Item Type** – The subclass the commodity is associated with.
- Enter the commodity information for any optional fields.
- Clicking the **Create** button will then create the new item.
- Clicking the **Cancel** button will clear the input fields.

To modify a commodity, the user must do the following:

- Find the commodity you want to modify in either the *By Category* or *By Room* tree shown below in figures x.x and x.x.
- Click on the commodity to automatically fill the input fields with its current data. Then, make the necessary changes to the input fields
- Clicking the **Modify** button will then update the commodity with the new data.
- Clicking the **Cancel** button will clear the input fields.





Add Stock for Existing Item

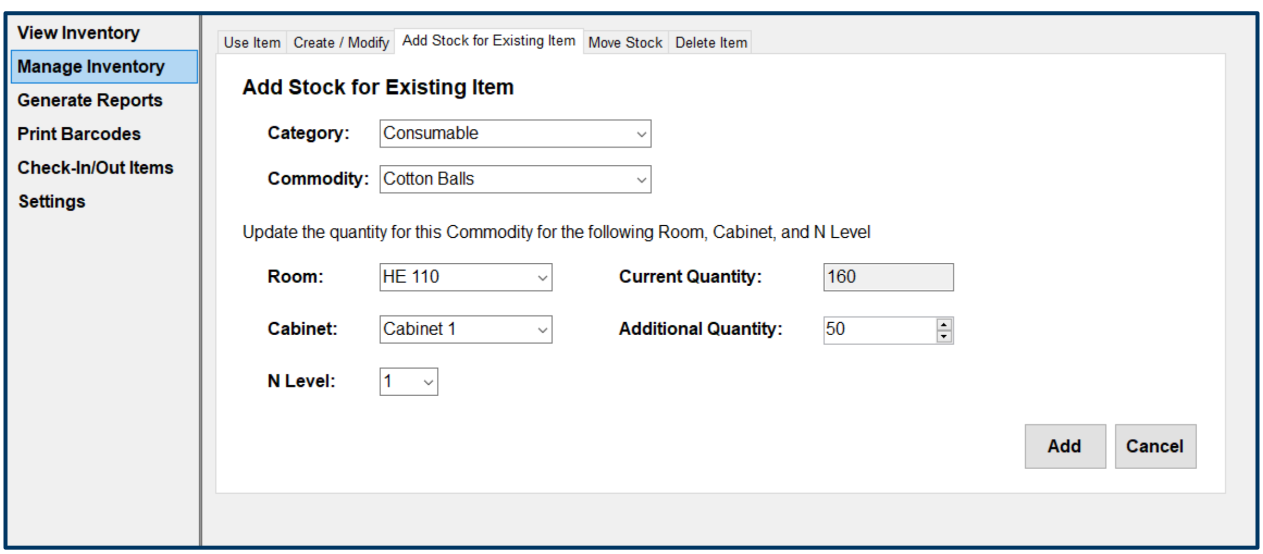
Manage Inventory → Add Stock for Existing Item

This **Add Stock for Existing Item** operation allows the user to add to the existing quantity for a specified commodity. The user will be required to input the following information:

1. **Category** - The category the commodity falls under.
2. **Commodity** – The name of the commodity.
3. **Room** – The room number.
4. **Cabinet** – The cabinet location.
5. **N Level** – The N-Level the commodity belongs to.
6. **Additional Quantity** – The amount being added.

Once the user has entered all the required information:

- Clicking the **Add** button will update the quantity. An example of this is shown in figure x.x on page x.
- Clicking the **Cancel** button will clear the current input fields.



Move Stock

Manage Inventory → Move Stock

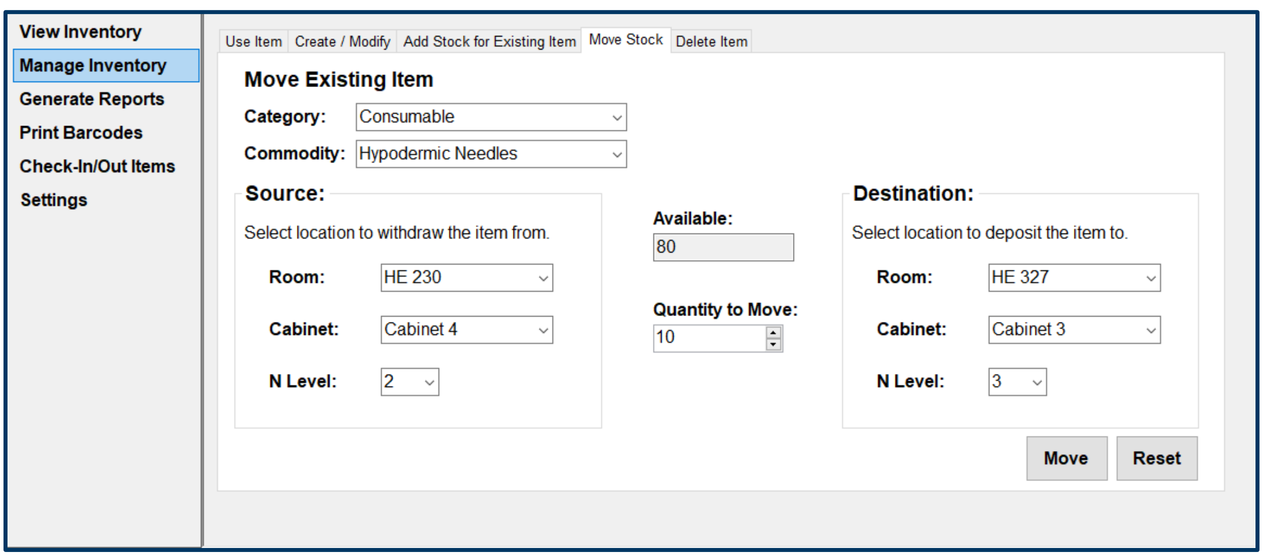
The **Move Stock** operation allows the user to transfer inventory from one location to another.

The user will be required to input the following information:

1. The **Category** the commodity falls under.
2. The **Commodity** they want.
3. The **Room** number for the source and destination.
4. The **Cabinet** location for the source and destination.
5. The **N Level** the commodity belongs to for the source and destination.
6. The **Quantity to Move** from the source to the destination.

Once the user has entered all the required information:

- Clicking the **Move** button will transfer the commodity from the source to the destination location.
- Clicking the **Reset** button will clear the current input fields.



Delete Item

Manage Inventory → Delete Item

This **Delete Item** operation allows the user to delete an existing commodity from the system and all locations. The user will be required to input the following information:

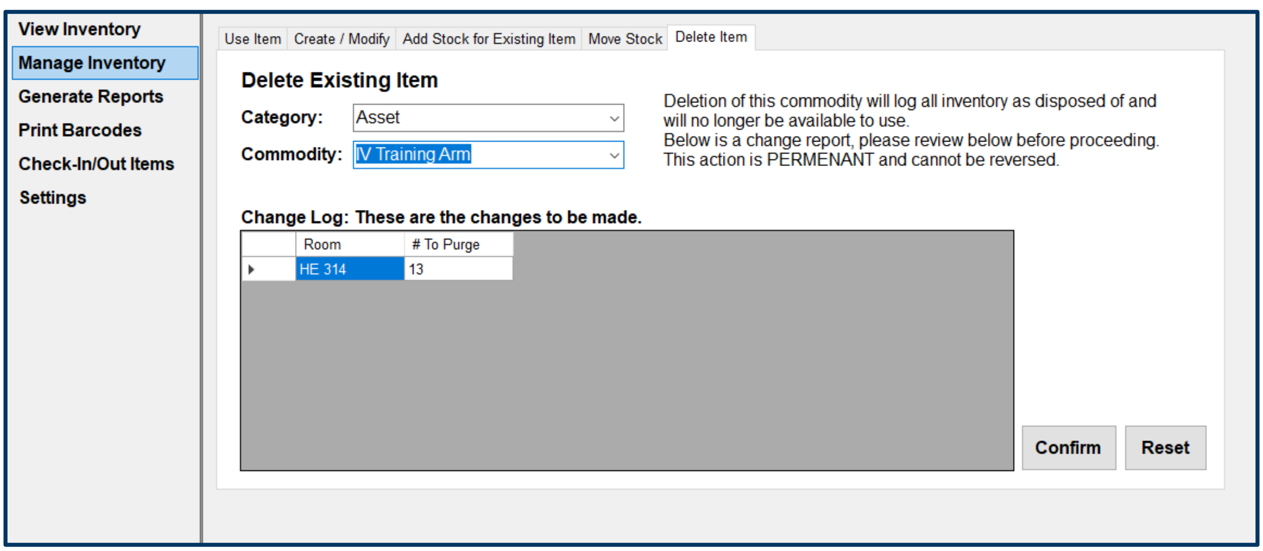
1. The **Category** the commodity falls under.
2. The **Commodity** they want to delete.

Once the user has entered all the required information:

- A listing of all the rooms the commodity is in and the quantity for each room will be shown in the *Change Log* section.

➢ If the user clicks the **Confirm** button, the commodity will be permanently deleted from the system. An example of this is shown in figure x.x on page x.

➢ If the user clicks the **Reset** button, the input fields will be cleared.



Generate Reports

The **Generate Reports** option is where users will go to view, export, and print inventory reports. A detailed description of what each report contains and how to perform various tasks within the reports will be given in the corresponding section of this manual. The four report options are as follows:

1. Activity Log
2. Simulator Use
3. Low Stock
4. Dynamic Items

Each report screen uses the same tool bar, as shown below in figure x.x.

*****Walk through the icons and give an explanation of each*****

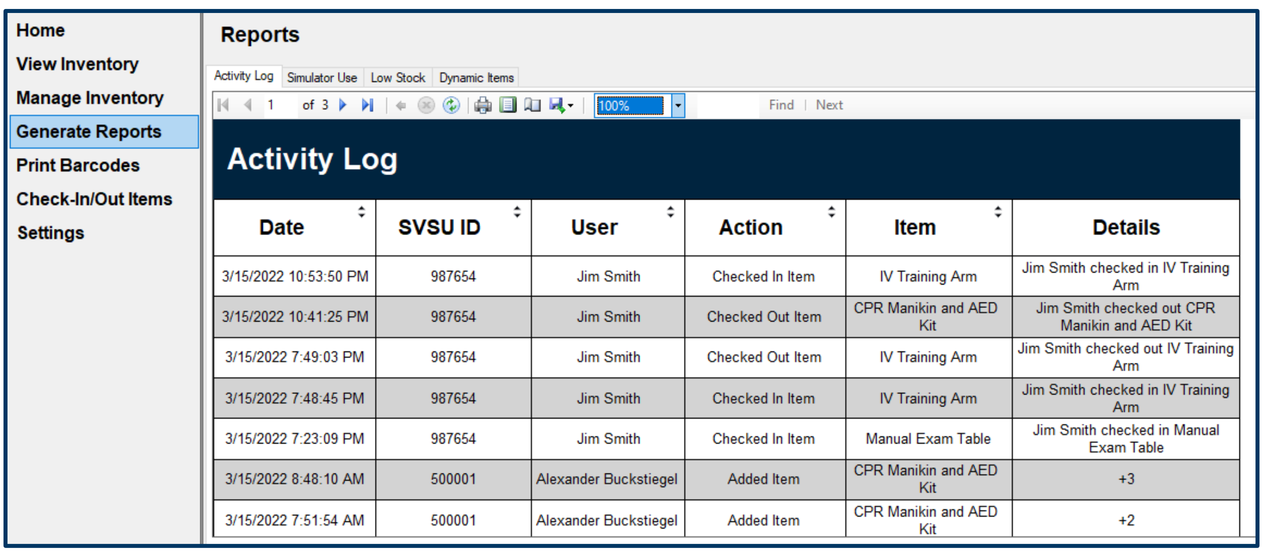
*****Define print option and the various save options here so it doesn't have to be repeated for each report*****

Activity Log

Generate Reports→ Activity Log

The **Activity Log** report displays all transactions that have occurred in the inventory management system. The report displays the following details, all of which, except for *details*, can be used to sort the results of the report:

- **Date** – Date and time the transaction occurred.
- **SVSU ID** – The SVSU ID number of the user receiving/returning a commodity.
- **User** – The name of the user receiving/returning a commodity.
- **Action** – The type of transaction performed. *EX: Checked in Item, Added Item, etc.*
- **Item** – The name of the commodity.
- **Details** – Additional information about the transaction.



Date	SVSU ID	User	Action	Item	Details
3/15/2022 10:53:50 PM	987654	Jim Smith	Checked In Item	IV Training Arm	Jim Smith checked in IV Training Arm
3/15/2022 10:41:25 PM	987654	Jim Smith	Checked Out Item	CPR Manikin and AED Kit	Jim Smith checked out CPR Manikin and AED Kit
3/15/2022 7:49:03 PM	987654	Jim Smith	Checked Out Item	IV Training Arm	Jim Smith checked out IV Training Arm
3/15/2022 7:48:45 PM	987654	Jim Smith	Checked In Item	IV Training Arm	Jim Smith checked in IV Training Arm
3/15/2022 7:23:09 PM	987654	Jim Smith	Checked In Item	Manual Exam Table	Jim Smith checked in Manual Exam Table
3/15/2022 8:48:10 AM	500001	Alexander Buckstiegel	Added Item	CPR Manikin and AED Kit	+3
3/15/2022 7:51:54 AM	500001	Alexander Buckstiegel	Added Item	CPR Manikin and AED Kit	+2

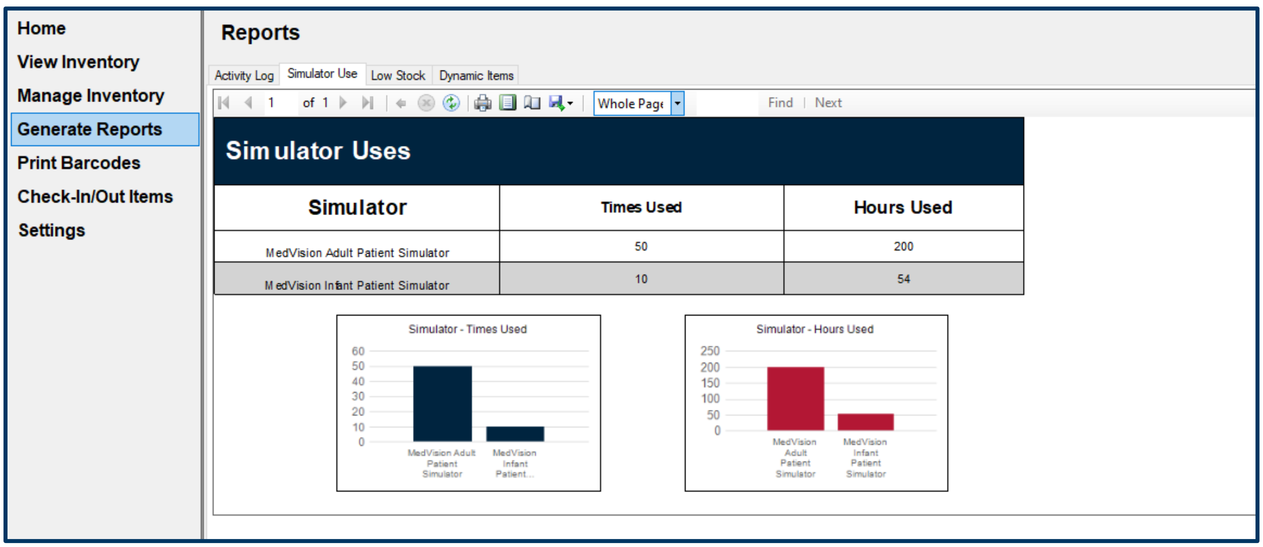
Simulator Use

Generate Reports→ Simulator Use

The **Simulator Use** report displays a table containing the following information about each simulator in the system:

- **Simulator** – The name of the simulator.
- **Times Used** – The total number of times the simulator has been used.
- **Hours Used** – The total number of hours the simulator has been used.

Below the table, two bar graphs are used graphically display the information from the table.

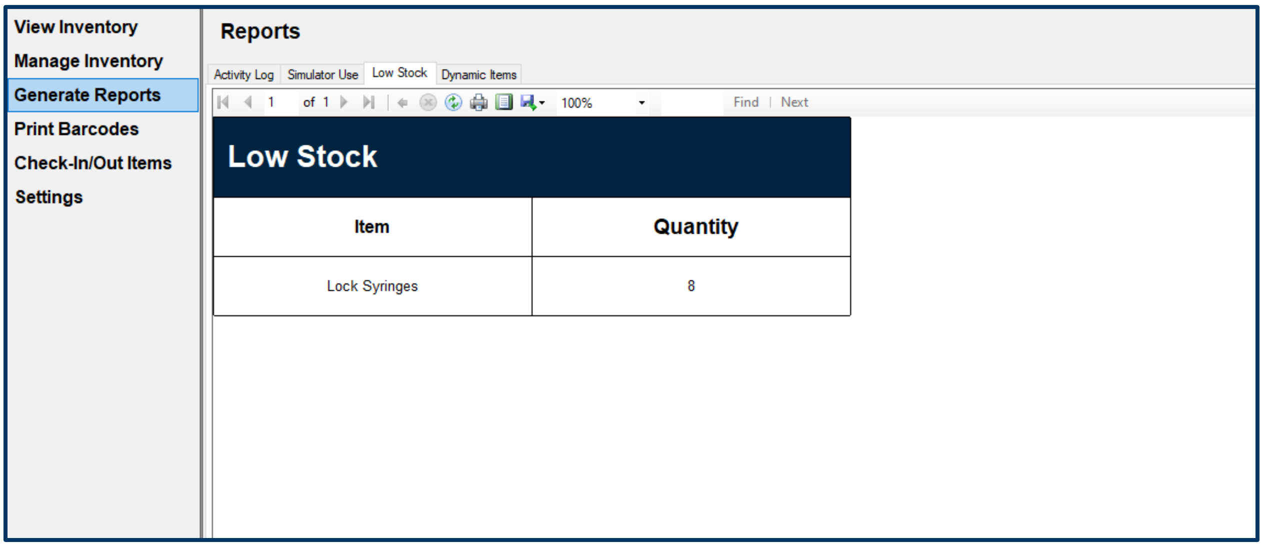


Low Stock

Generate Reports→ Low Stock

The **Low Stock** report displays a simple table containing all the commodities that are at or below their designated low stock threshold. This consists of the following columns:

- **Item** – The name of the commodity.
- **Quantity** – The current on-hand quantity of the commodity.

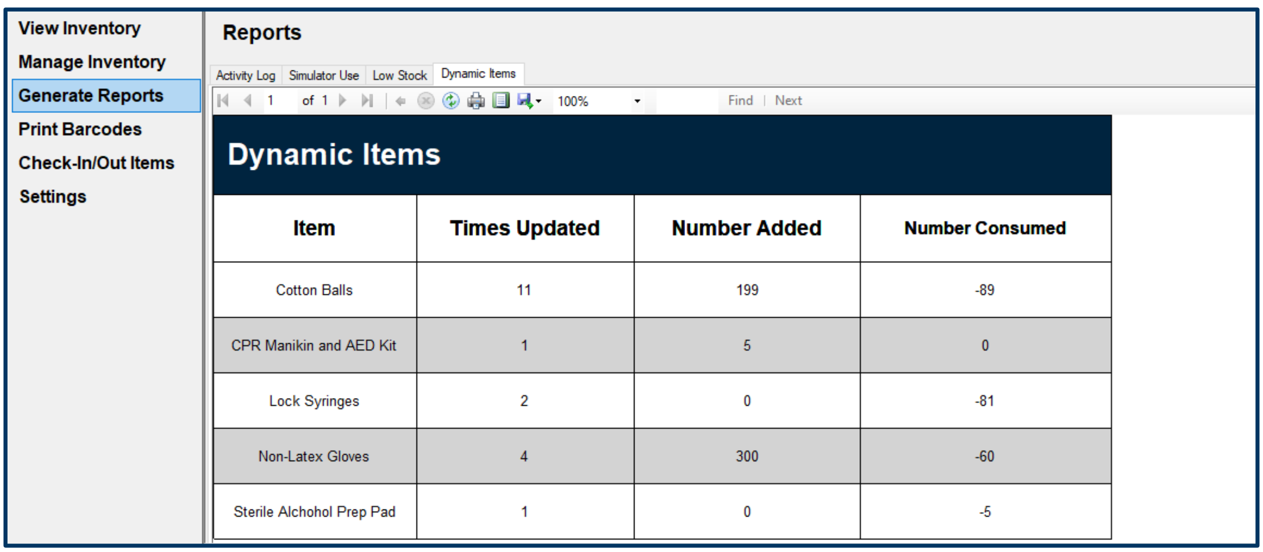


Dynamic Items

Generate Reports→ Dynamic Items

The **Dynamic Items** report displays a table containing the commodities that have undergone the most changes in the system. This consists of the following columns:

- **Item** – The name of the commodity.
- **Times Updated** – The total number of times the commodity's quantity has been changed.
- **Number Added** – The total amount that has been added to the commodity's quantity.
- **Number Consumed** – The total amount that has been removed from the commodity's quantity.



Item	Times Updated	Number Added	Number Consumed
Cotton Balls	11	199	-89
CPR Manikin and AED Kit	1	5	0
Lock Syringes	2	0	-81
Non-Latex Gloves	4	300	-60
Sterile Alchohol Prep Pad	1	0	-5

Check-In/Out Items

The **Check-In/Out Items** option will be used for checking in/out asset equipment. To start, the user must first select which operation they would like to perform:

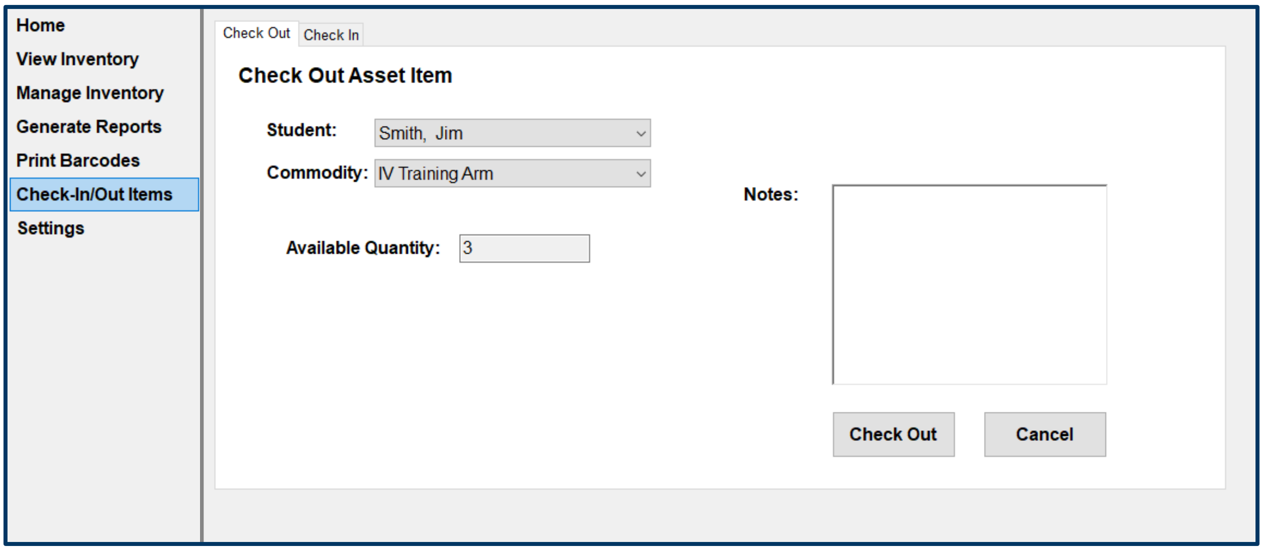
1. Check Out
2. Check In

Check Out

Check-In/Out Items → Check Out

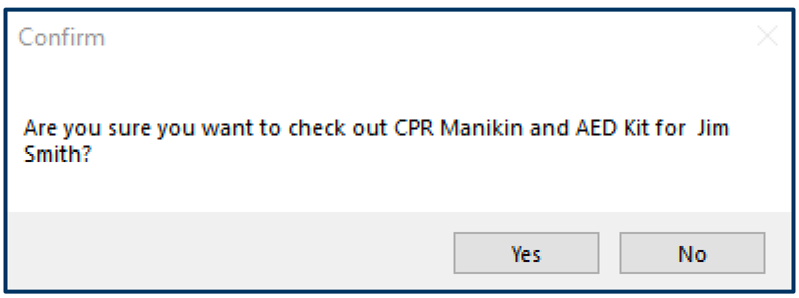
The **Check Out** operation, is used to check out an asset to a student. The user will be required to input the following information:

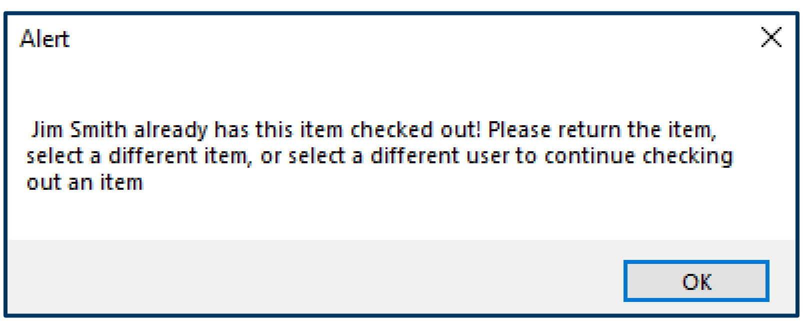
1. **Student** – The name of the student.
2. **Commodity** – The name of the asset being checked out.
3. **Notes** – An optional field to store any additional information in.



Once the user has entered all the required information:

- Clicking the **Cancel** button will clear the current input fields.
- Clicking the **Check Out** button will result in two outcomes:
    1. A confirmation message, shown in figure x.x on page x, will be displayed.
        - Clicking **Yes** will complete the checkout process.
        - Clicking **No** will cancel the checkout process.
    2. A warning message, shown in figure x.x on page x, will be displayed if the student already has the selected asset checked out.



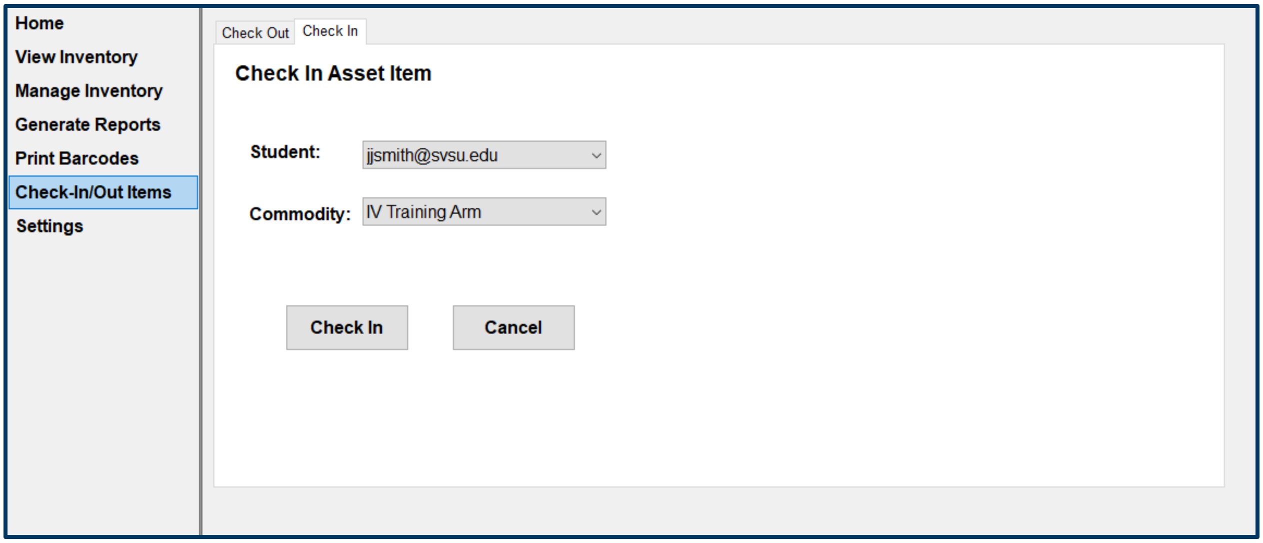


Check In

Check-In/Out Items → Check In

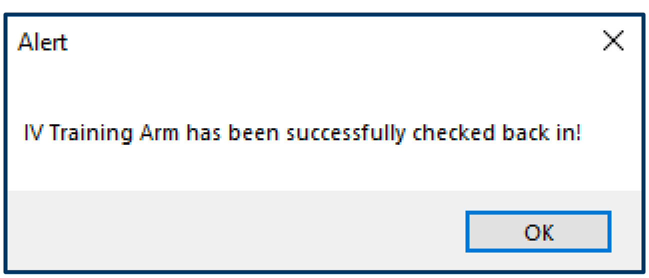
The **Check In** operation, is used to check-in an asset from a student. The user will be required to input the following information:

1. **Student** – The name of the student.
2. **Commodity** – The name of the asset being checked out.



Once the user has entered all the required information:

- Clicking the **Cancel** button will clear the current input fields.
- Clicking the **Check In** button will complete the asset return and provide a confirmation message that the return was successful, as shown in figure x.x on page x.



Settings

The **Settings** tab allows for the modification of the program by a user with administrative authority. There are six settings options the user can select from. A detailed description of what each option does and how to perform various operations will be given in the corresponding section of this manual. The six inventory management options are as follows:

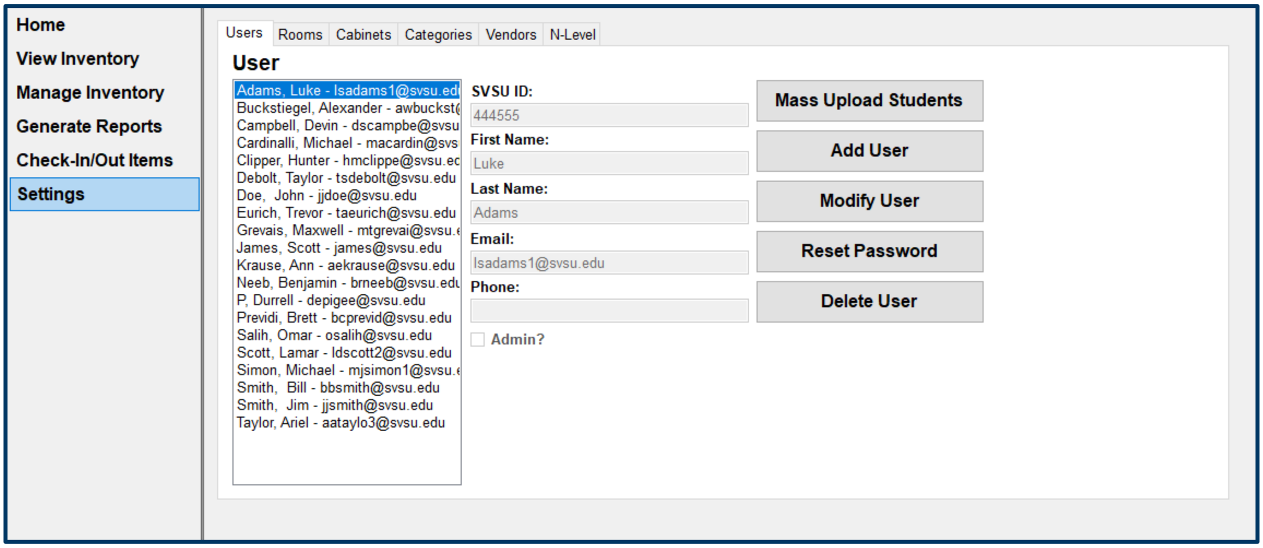
1. Users
2. Rooms
3. Cabinets
4. Categories
5. Vendors
6. N-Level

Users

Settings → Users

The **Users** setting allows administrative users to manage all the user accounts in the system.

Shown below in figure x.x is the initial screen user's will see.



Upon selecting a user from the list, the following information will be displayed:

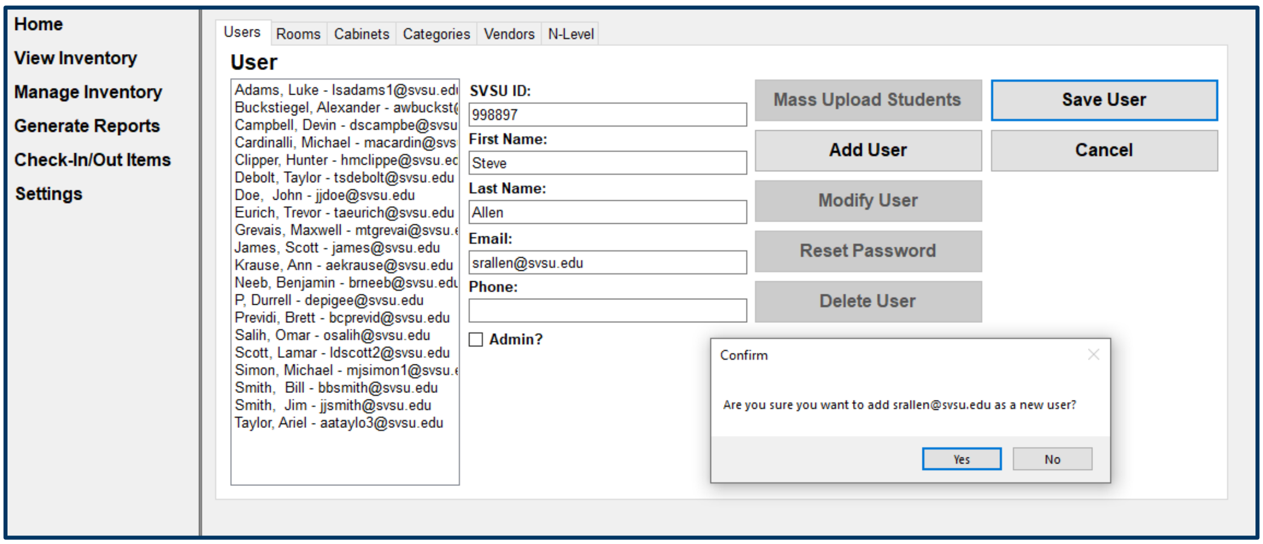
- **SVSU ID** – User's SVSU ID number.
- **First Name -** User's first name.
- **Last Name** - User's last name.
- **Email** - User's SVSU email address.
- **Phone** - User's phone number.
- **Admin status** - User's Admin status.

There are five operations that can be performed in regards to user management:

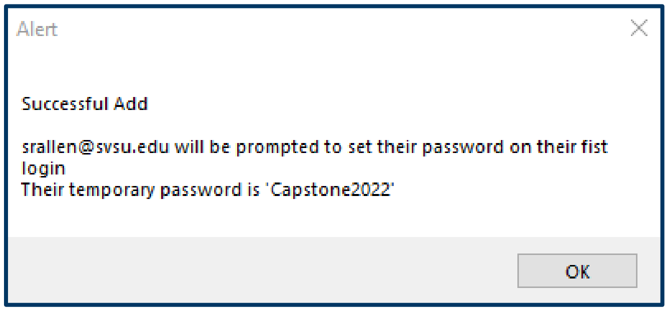
1. **Mass Upload Students** – Pulls in student data stored in and Excel file for multiple users.

2. **Add User** – Adds a new user to the system.

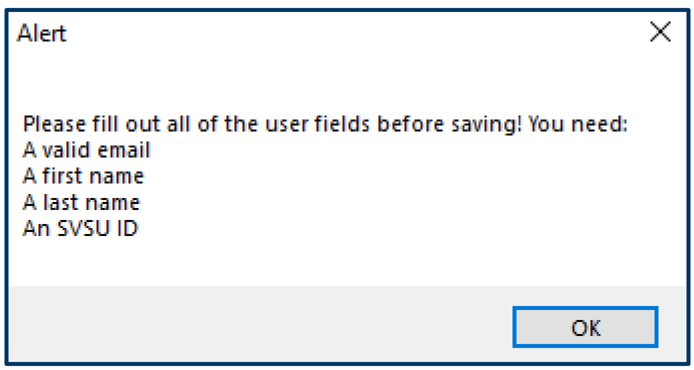
   - Upon clicking the **Add User** button, all six fields will be unlocked and two new buttons will appear; **Save User** and **Cancel**. The user will then enter in the new user's information.
   - Upon clicking the **Save User** button, the user will receive a confirmation message asking if they want to add the user, as shown in figure x.x on page x.



   - If the user clicks **No**, operation will be canceled and the fields will be cleared.
   - If the user clicks **Yes**, they will receive the success message shown in figure x.x on page x. The user will then appear in the user list.

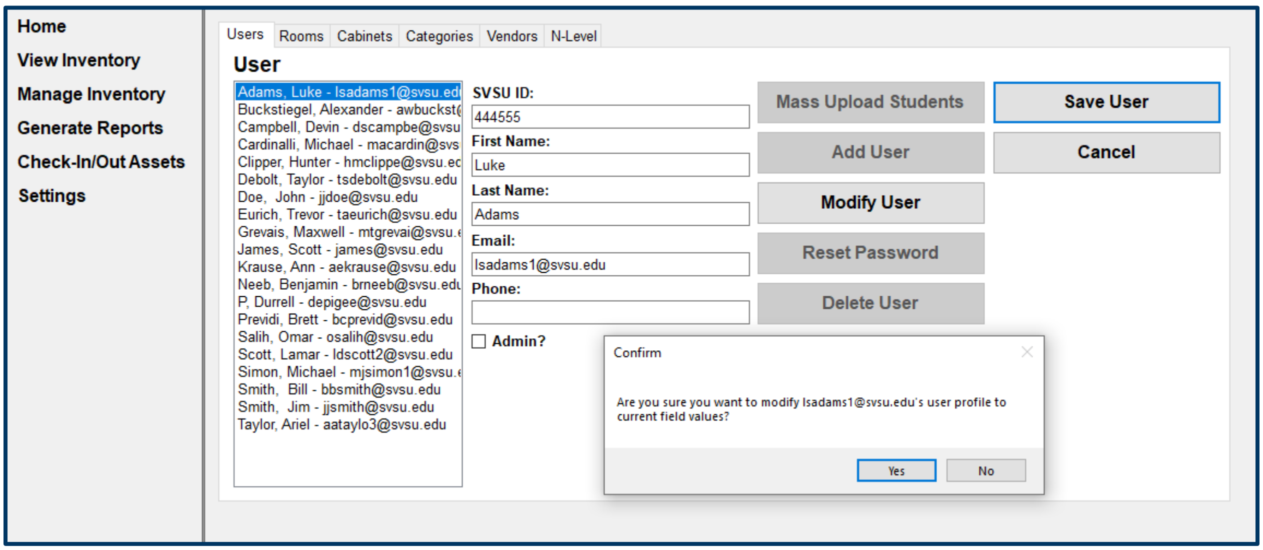


- *Note*: All fields except for phone number and admin status are required. If a user leaves one of these fields blank, they will receive an error message shown in figure x.x.

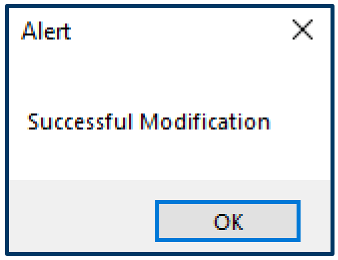


3. **Modify User** – Allows for the modification of an existing user's information.

   - Upon selecting the user you want to modify and clicking the **Modify User** button, all six fields will be unlocked and two new buttons will appear; **Save User** and **Cancel**. The user can then make changes to the existing user's information.
   - Upon clicking the **Save User** button, the user will receive a confirmation message asking if they want to modify the user, as shown in figure x.x on page x.



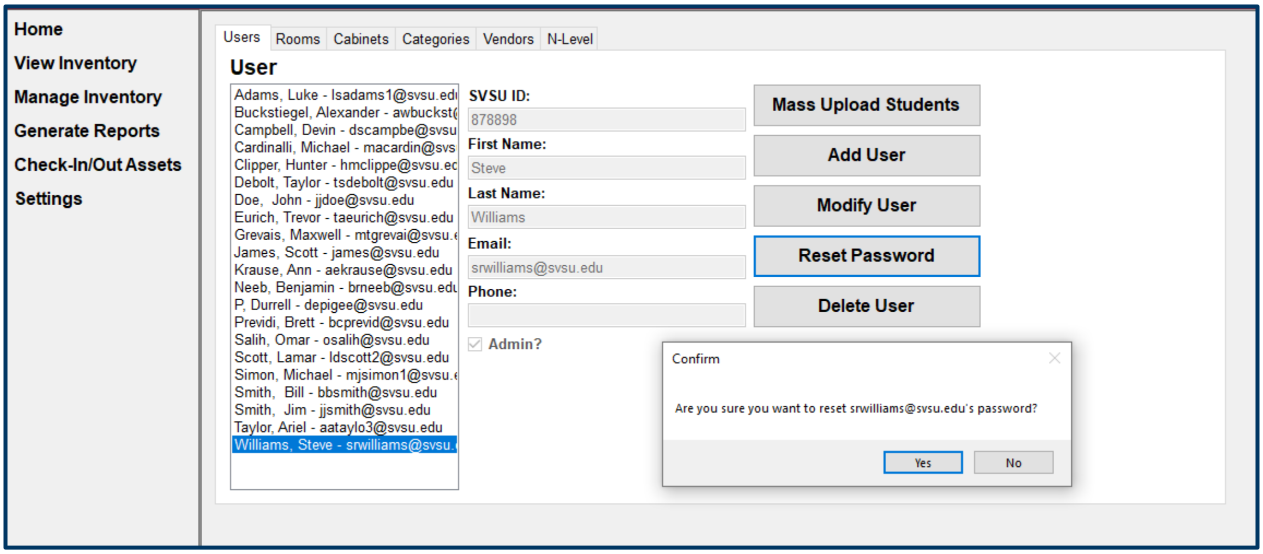
   - If the user clicks **No**, operation will be canceled and the fields will be cleared.
   - If the user clicks **Yes**, they will receive the success message shown in figure x.x on page x. The user will then appear in the user list.



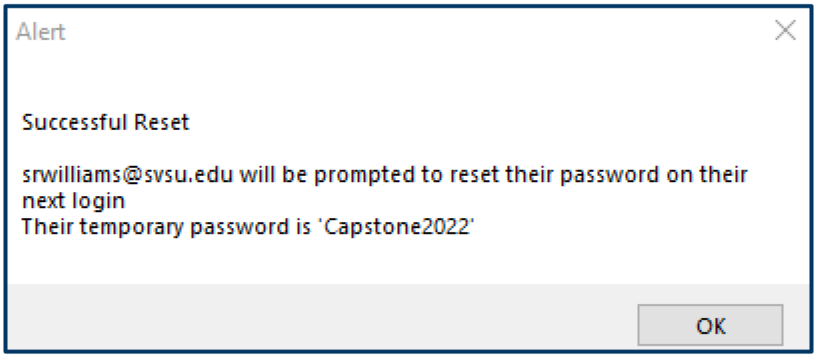
- *Note*: When modifying a user, it is still required for a user to have a valid SVSU ID, email address, first name, and last name.

4. **Reset Password** – Allows for administrative users to reset other administrative user's passwords.

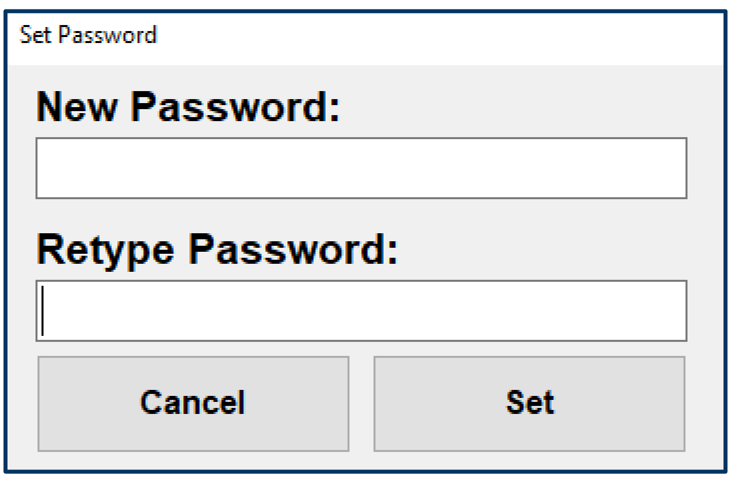
- Upon selecting the user that needs their password reset and clicking the **Reset Password** button, a confirmation message will appear asking if you want to reset the user's password, as shown in figure x.x on page x.

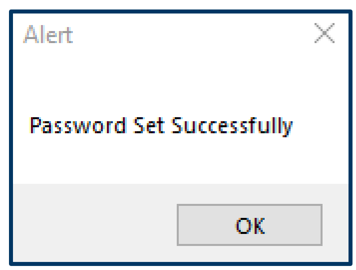


- Clicking **No** will cancel the operation.
- Clicking **Yes** will display a confirmation message that the reset was successful. It will also give the user a temporary password to enter the next time they log in, as shown in figure x.x on page x.



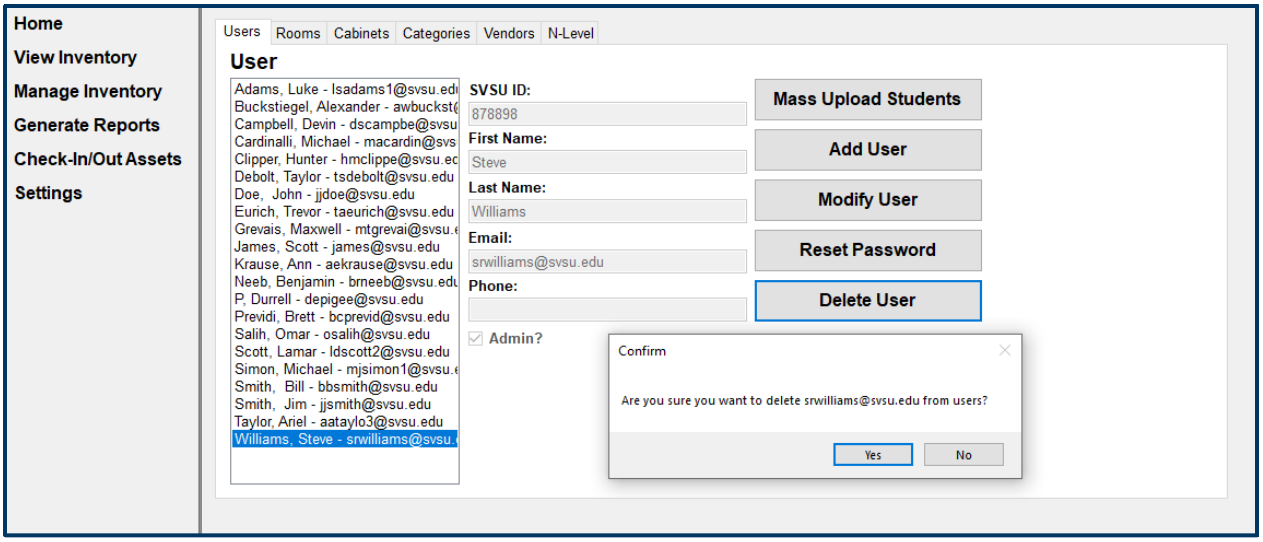
- After a password reset, the next time the user logs in they will be prompted to set up a new password. The only criteria is the password must be at least eight characters long.
- Figure x.x shows the prompt the user will receive to set up a new password.
- Figure x.x shows the confirmation message that the new password was accepted



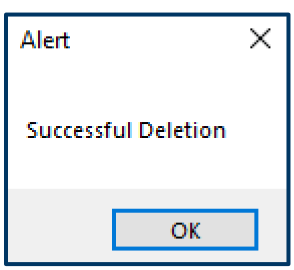


5. **Delete User** – Allows for the deletion of a user.

   - Upon selecting the user that you want to delete and clicking the **Delete User** button, a confirmation message will appear asking if you want to delete the user, as shown in figure x.x.



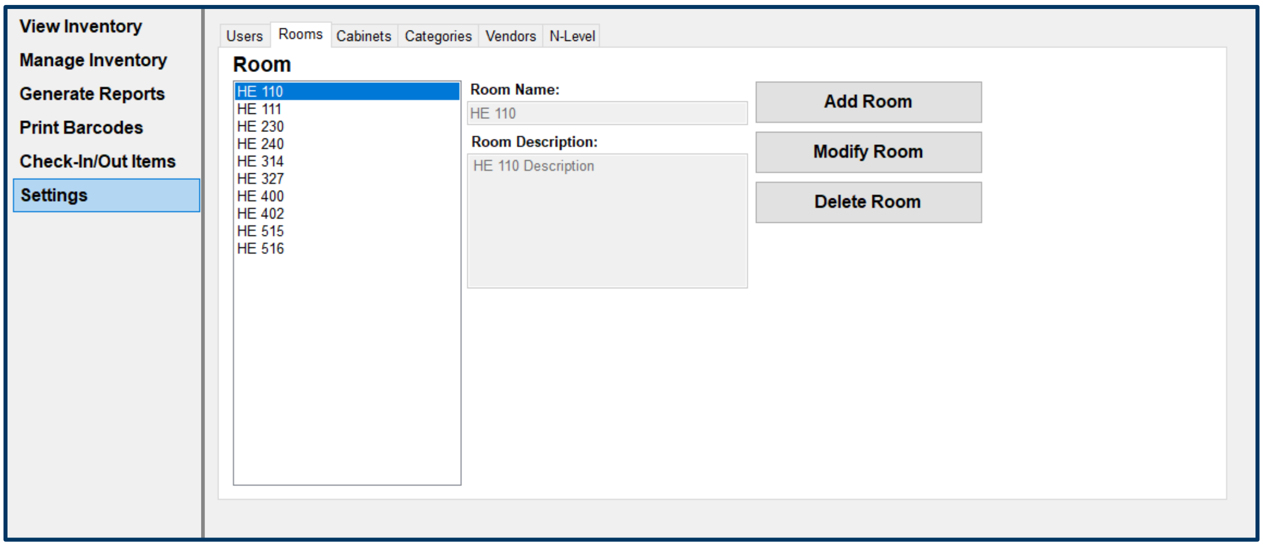
   - Clicking **No** will cancel the operation.
   - Clicking **Yes** will display a confirmation message that the deletion was successful, as shown in figure x.x.



Rooms

Settings → Rooms

The **Rooms** setting allows administrative users to manage all the rooms in the system. Shown below in figure x.x is the initial screen user's will see.



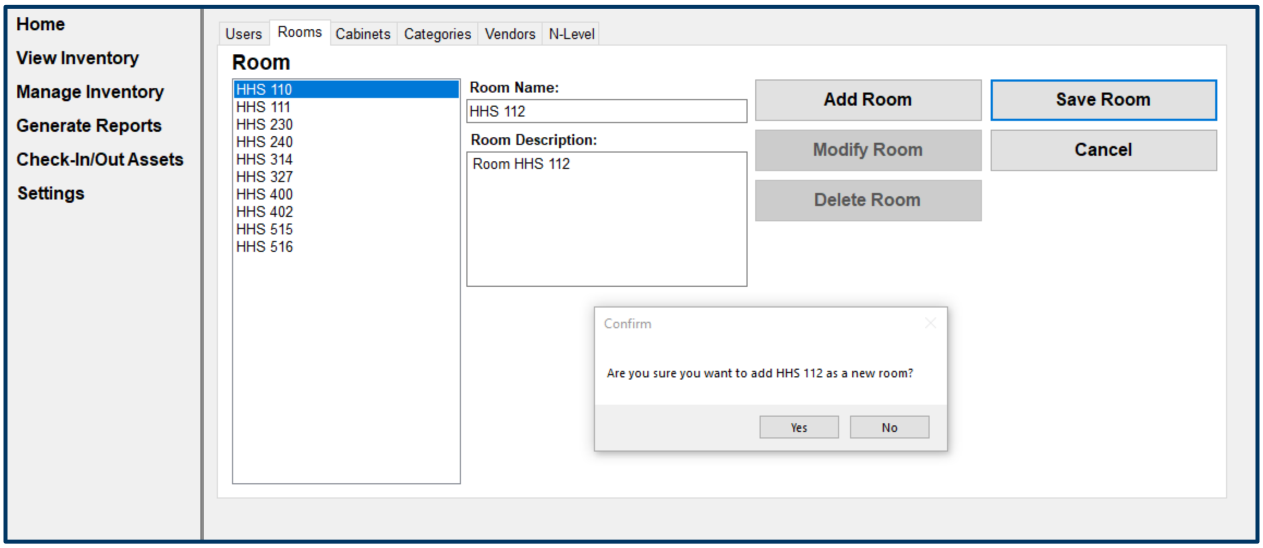
Upon selecting a room from the list, the following information will be displayed:

- **Room Name** – The name of the room.
- **Room Description –** Additional details about the room.

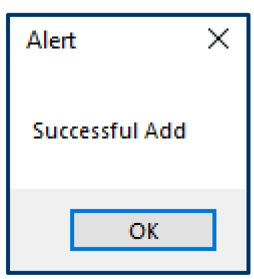
There are three operations that can be performed in regards to room management:

1. **Add Room** – Adds a new room to the system

   - Upon clicking the **Add Room** button, all fields will be unlocked and two new buttons will appear; **Save Room** and **Cancel**. The user will then enter in the new room's information.
   - Upon clicking the **Save Room** button, the user will receive a confirmation message asking if they want to add the room, as shown in figure x.x on page x.

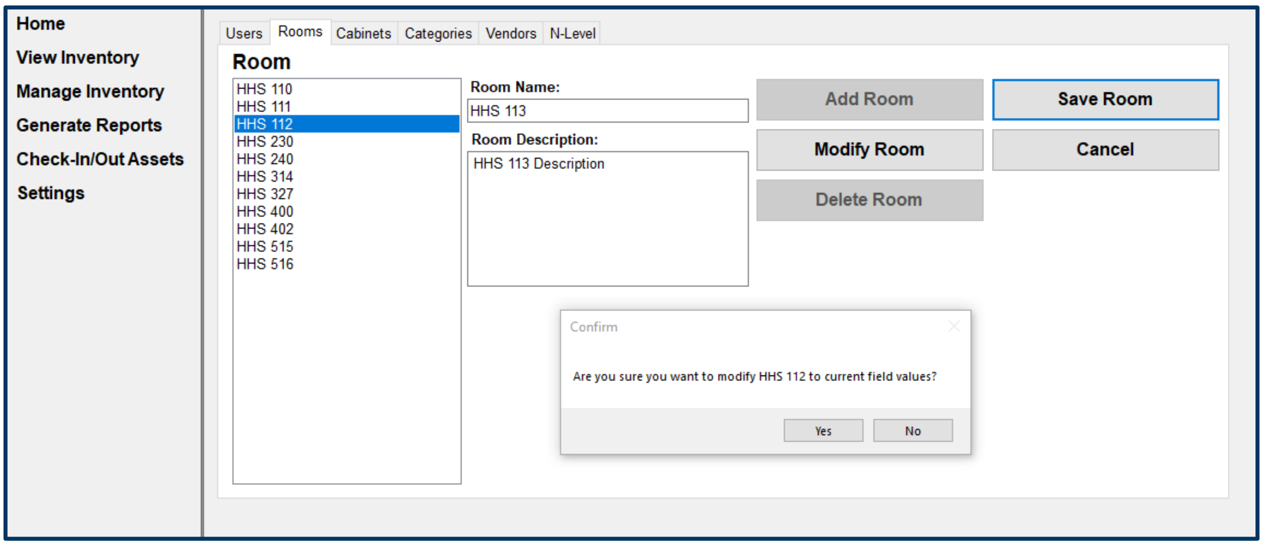


   - Clicking **No** will cancel the operation.
   - Clicking **Yes** will display a confirmation message that the addition was successful, as shown in figure x.x.

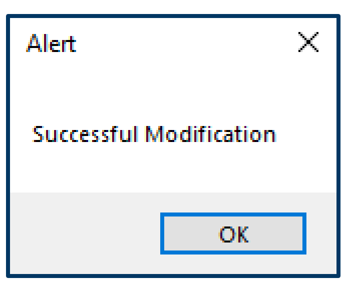


2. **Modify Room** – Allows for the modification of an existing room in the system.

   - Upon selecting the room you want to modify and clicking the **Modify Room** button, all fields will be unlocked and two new buttons will appear; **Save Room** and **Cancel**. The user can then make changes to the existing room's information.
   - Upon clicking the **Save Room** button, the user will receive a confirmation message asking if they want to modify the room, as shown in figure x.x.

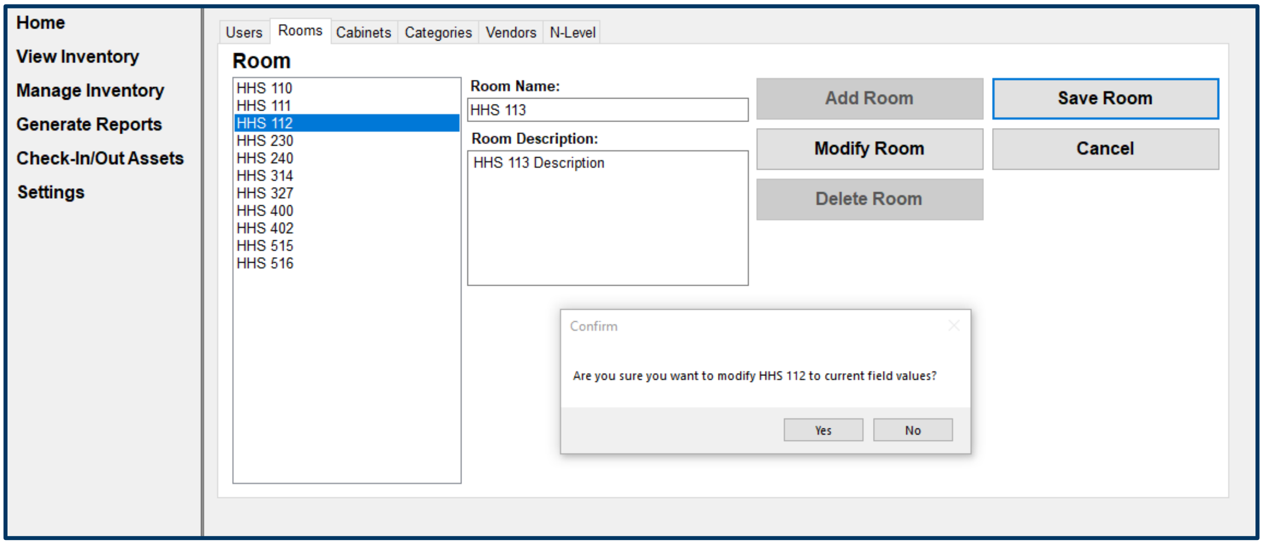


   - Clicking **No** will cancel the operation.
   - Clicking **Yes** will display a confirmation message that the modification was successful, as shown in figure x.x.

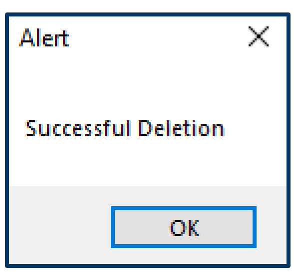


3. **Delete Room** – Allows for the deletion of an existing room in the system.

   - Upon selecting the room that you want to delete and clicking the **Delete Room** button, a confirmation message will appear asking if you want to delete the room, as shown in figure x.x.



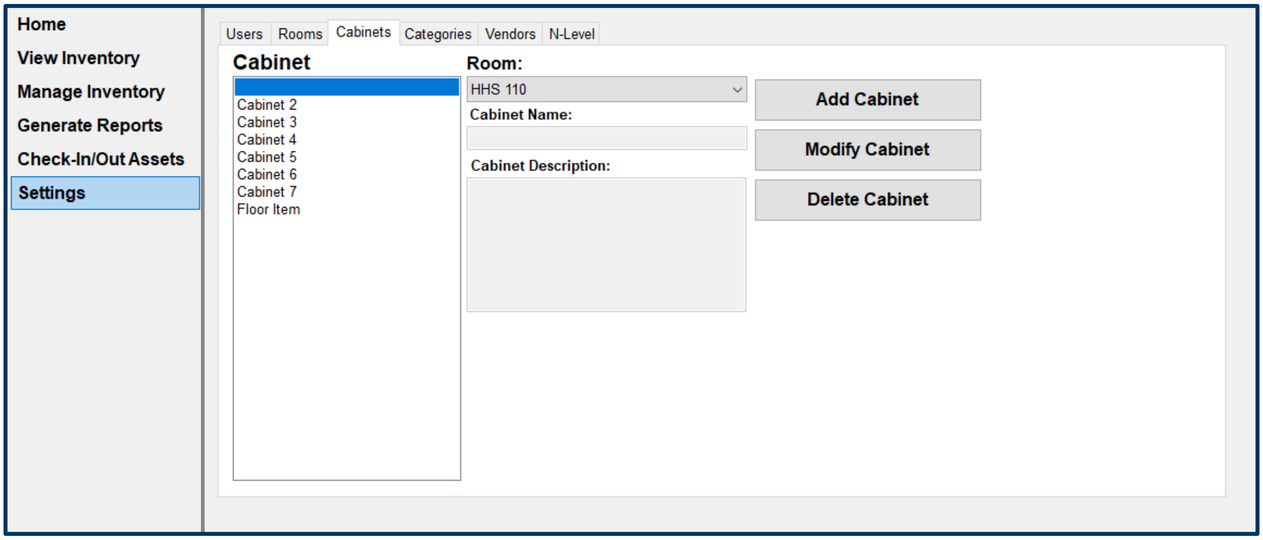
   - Clicking **No** will cancel the operation.
   - Clicking **Yes** will display a confirmation message that the deletion was successful, as shown in figure x.x.



Cabinets

Settings → Cabinets

The **Cabinets** setting allows administrative users to manage all the cabinets or sub-locations for each room in the system. Shown below in figure x.x is the initial screen user's will see.



Upon selecting a room from the **Room** dropdown menu, a list of all cabinets/sub-locations will be shown for that room. Clicking on one of the cabinets/sub-locations will display the following information:

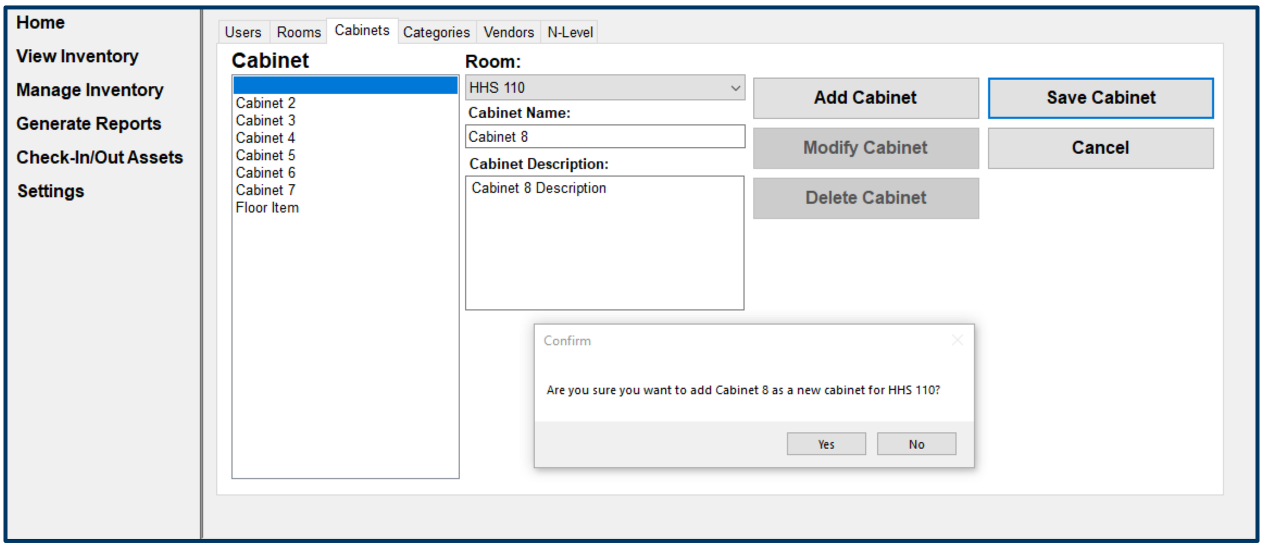
- **Cabinet Name** – The name of the cabinet.
- **Cabinet Description –** Additional details about the cabinet.

There are three operations that can be performed in regards to cabinet management:

1. **Add Cabinet** – Adds a new cabinet to the system.

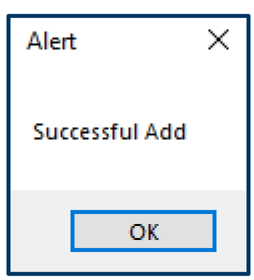
   ➢ Upon selecting the desired room and clicking the **Add Cabinet** button, all fields will be unlocked and two new buttons will appear; **Save Cabinet** and **Cancel**. The user will then enter in the new cabinet's information.

   ➢ Upon clicking the **Save Cabinet** button, the user will receive a confirmation message asking if they want to add the cabinet, as shown in figure x.x on page x.



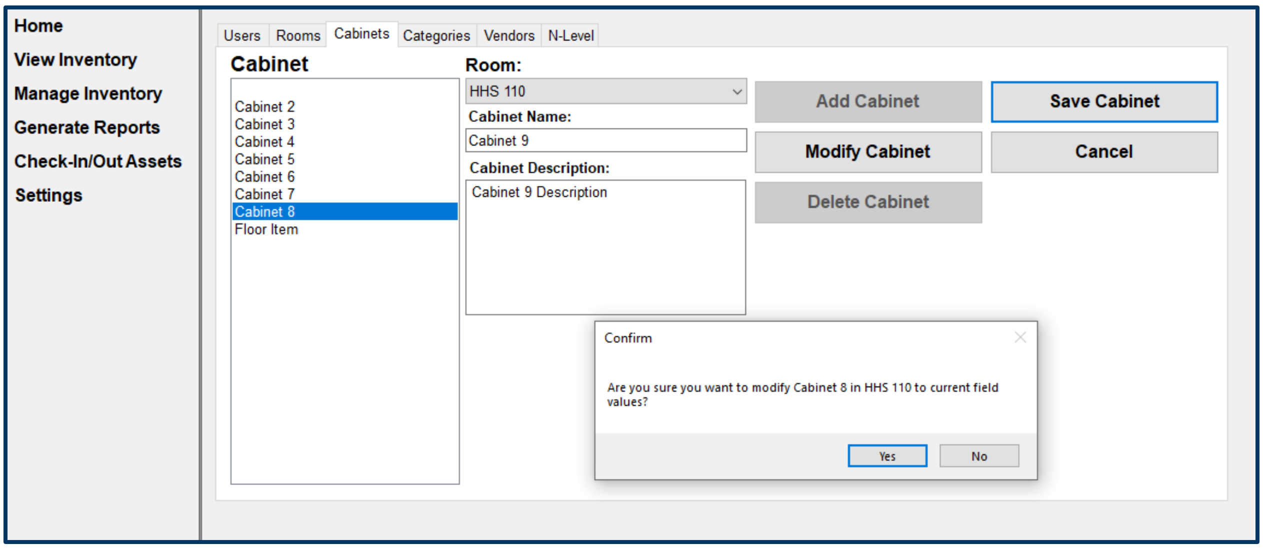
   ➢ Clicking **No** will cancel the operation.

   ➢ Clicking **Yes** will display a confirmation message that the addition was successful, as shown in figure x.x.

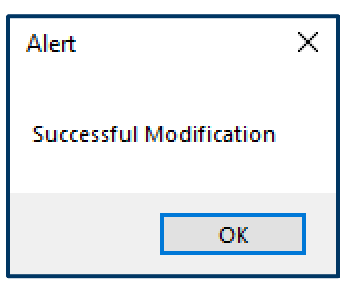


2. **Modify Cabinet** – Allows for the modification of an existing cabinet in the system.

- Upon selecting the desired room and clicking on the cabinet you want to modify, clicking the **Modify Cabinet** button will unlock all fields and two new buttons will appear; **Save Cabinet** and **Cancel**. The user can then make changes to the existing cabinet's information.
- Upon clicking the **Save Cabinet** button, the user will receive a confirmation message asking if they want to modify the room, as shown in figure x.x.

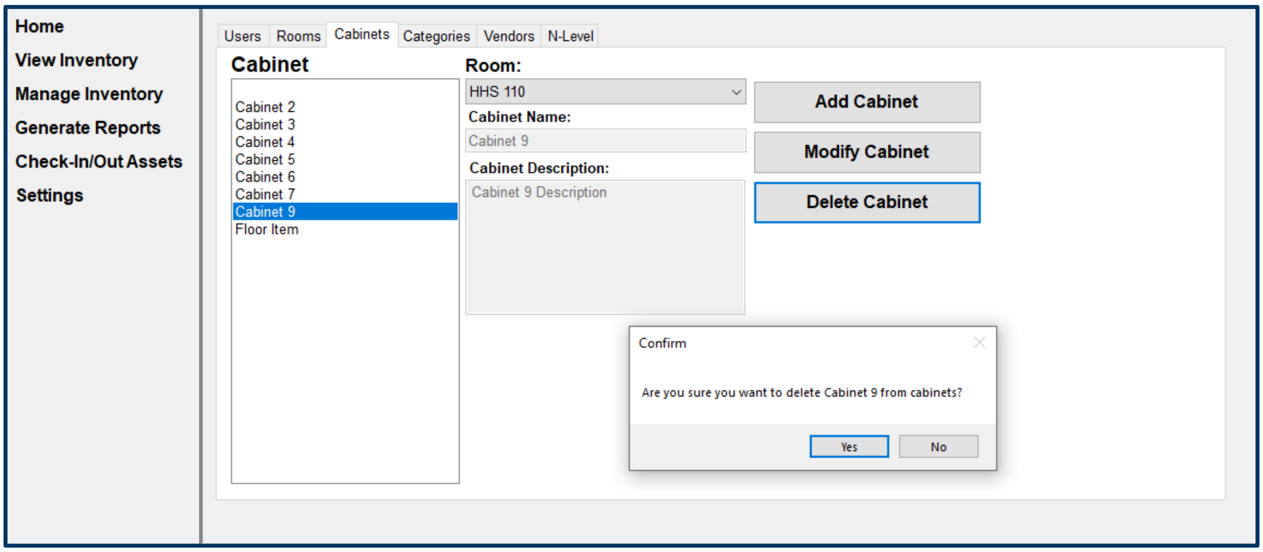


- Clicking **No** will cancel the operation.
- Clicking **Yes** will display a confirmation message that the modification was successful, as shown in figure x.x.



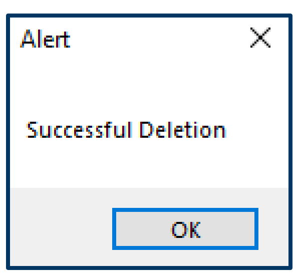
3. **Delete Cabinet** – Allows for the deletion of an existing cabinet in the system.

   ➢ Upon selecting the desired room and clicking on the cabinet you want to delete, clicking the **Delete Cabinet** button will display a confirmation message asking if you want to delete the cabinet, as shown in figure x.x.



   ➢ Clicking **No** will cancel the operation.

   ➢ Clicking **Yes** will display a confirmation message that the deletion was successful, as shown in figure x.x.



Categories

Settings → Categories

Vendors

Settings → Vendors

N-Level

Settings → N-Level