



Inventory Management System

User Manual

Last Edited 04/14/2022

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General Information

Purpose

The purpose of this manual is to provide instructions on how to use the Inventory Management System for SVSU's Simulation Lab. This manual will serve as a guide for performing day-to-day 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, text to type, or references to field or button names.
<i>Italics</i>	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 do not require action (e.g., “a pop-up window will appear”).

Login Screen

The first screen the user is presented with is the *splash screen*, shown below in figure 1.0, which displays the program booting up. Once the program has loaded, the user will see the *login screen*, shown below in figure 1.1.



Figure 1.0

Figure 1.1

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

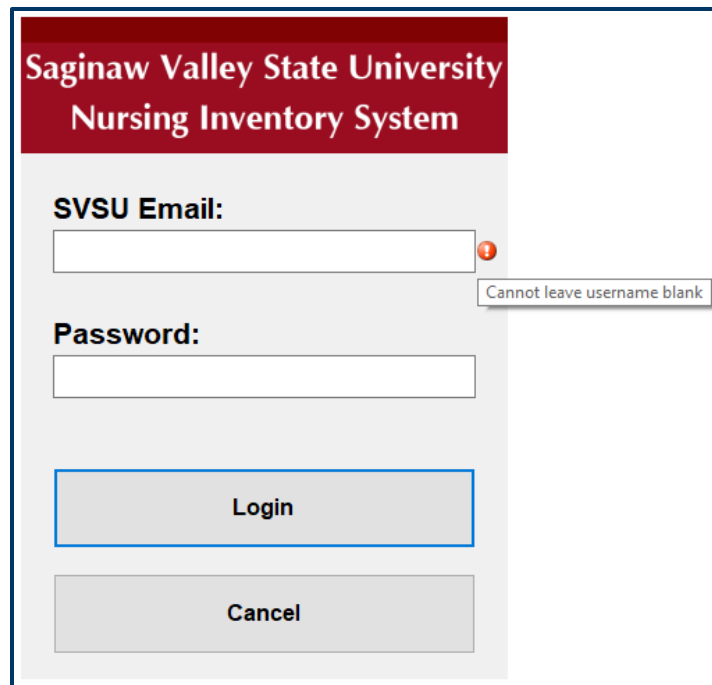
Note:

- The login credentials used for this program are the same as the credentials used for all other SVSU applications. When you log in, your credentials will first be validated by the CSIS server. The program will then verify your username exists within the user list and that you have admin authority.

Login Screen Errors

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

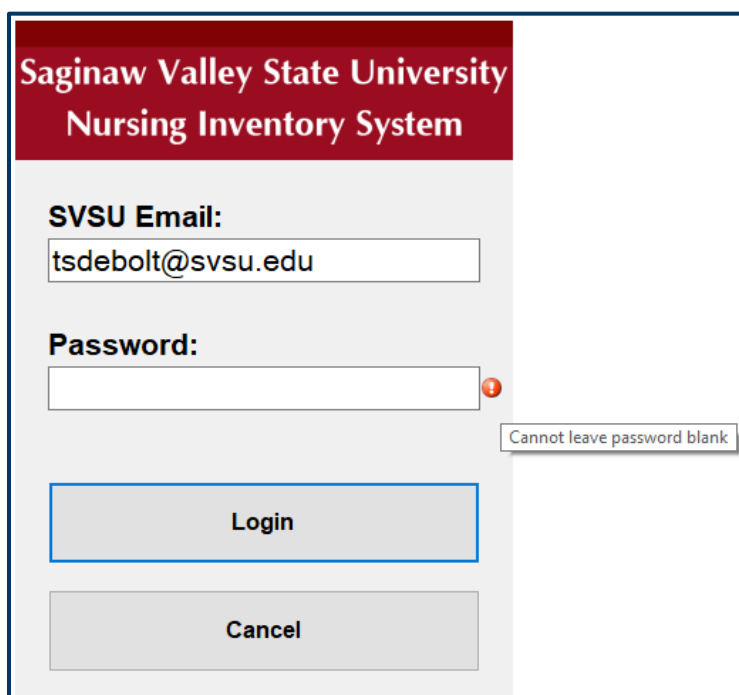
- The error shown below in figure 1.2 occurs when the user leaves the SVSU email field blank.



The screenshot displays the login interface for the Saginaw Valley State University Nursing Inventory System. It features a red header with the system name. Below the header, there are two input fields: 'SVSU Email:' and 'Password:'. The 'SVSU Email:' field is empty, and a red error icon is visible to its right. A tooltip message, 'Cannot leave username blank', is displayed next to the error icon. Below the input fields are two buttons: 'Login' and 'Cancel'.

Figure 1.2

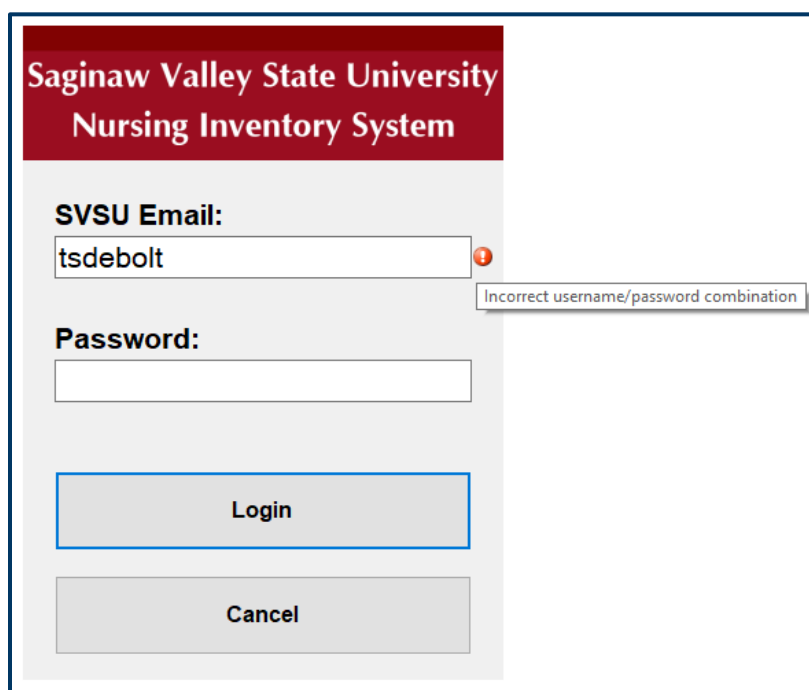
- The error shown in figure 1.3 on page 8 occurs when the user leaves the password field blank.



The login screen features a red header with the text "Saginaw Valley State University Nursing Inventory System". Below the header, there are two input fields: "SVSU Email:" with the value "tsdebolt@svsu.edu" and "Password:". The password field is empty, and a red error icon is visible to its right. A tooltip message "Cannot leave password blank" is displayed next to the password field. At the bottom, there are two buttons: "Login" and "Cancel".

Figure 1.3

- The error shown below in figure 1.4 occurs if the SVSU email and password entered were rejected for not matching the user's existing credentials.



The login screen features a red header with the text "Saginaw Valley State University Nursing Inventory System". Below the header, there are two input fields: "SVSU Email:" with the value "tsdebolt" and "Password:". The password field is empty, and a red error icon is visible to its right. A tooltip message "Incorrect username/password combination" is displayed next to the password field. At the bottom, there are two buttons: "Login" and "Cancel".

Figure 1.4

Main Screen

Once a user has successfully logged in to the system, they will then see the *main screen*, as shown below in figure 2.0. This screen will always be visible while a user is logged in and consists of three distinct parts:

1. [Options Panel](#)
2. [Session Panel](#)
3. [Display Area](#)

Saginaw Valley State University Nursing Inventory System

User: Alexander
Login time: 04:42:04 PM 03/28/2022
04:46:27 PM 03/28/2022
[Log Out](#)

Options Panel (1):

- Home
- View Inventory
- Manage Inventory
- Generate Reports
- Check-in/Out Assets
- Settings

Display Area (3):

Welcome!

Low Stock Commodities

Name	Quantity
Cotton Balls	42
Lightweight Polypropylene Isolation Gowns	200
Lock Syringes	11
Venturi Oxygen Mask	203

Checked Out Asset Equipment

Commodity Name	Username	Email	Date	Details
CPR Manikin and AED Kit	John Doe	jdoe@svsu.edu	3/28/2022 11:44 AM	
CPR Manikin and AED Kit	Lamar Scott	lscott2@svsu.edu	3/26/2022 10:40 AM	

[User Guide](#)

Figure 2.0

Options Panel

As denoted by arrow #1 in figure 2.0 on page 9, the *Options Panel* is located on the left-hand side of the screen and has 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 2.0 on page 9.

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 2.0 on page 9, the *Session Panel* is in the top right corner of the screen and displays the following information:

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

Once the user clicks the **Logout** button, they will receive a popup window, shown below in figure 2.1, asking them if they want to log out.

- If the user clicks **Yes**, they will be returned to the **Login Screen**, shown in figure 1.1 on page 6.
- If the user clicks **No**, they will remain on the main screen.

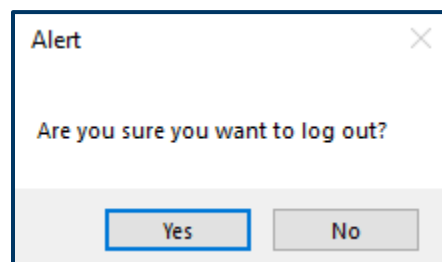


Figure 2.1

Display Area

As denoted by arrow #3 in figure 2.0 on page 9, the *Display Area* is the large box that takes up most of the screen. Upon selecting one of the options in the *Options Panel*, as denoted by arrow #1 in figure 2.0 on page 9, a new screen will be displayed within this area.

An example is shown below in figure 2.2. After selecting the **View Inventory** option, the new screen is displayed in the *Display Area*.

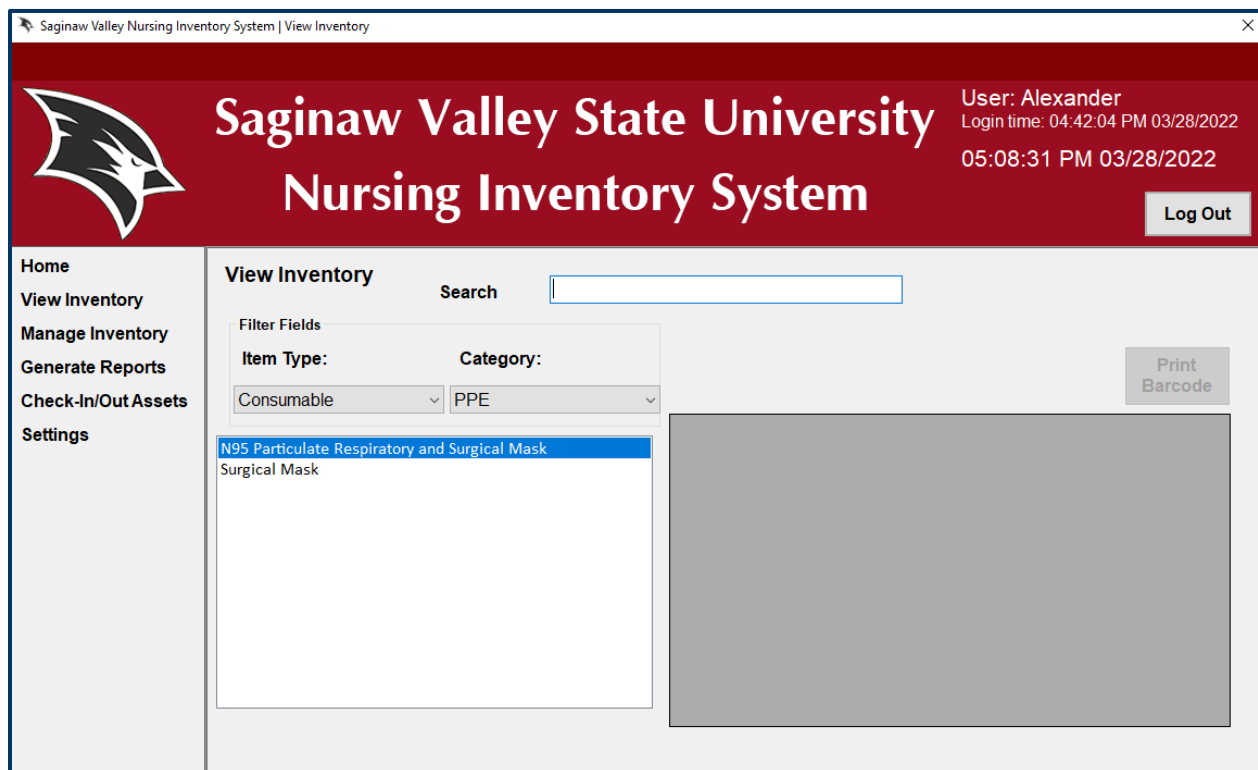


Figure 2.2

Home

The **Home** option will automatically be shown to users upon logging into the system, as shown in figure 3.0. This screen greets the users and provides them with the following information:

- **Low Stock Commodities** – Displays a list of all commodities that are at or below their low stock threshold.
- **Checked Out Asset Equipment** - Displays a list of all assets that are currently checked out. This also includes information about the student that possesses the asset, the date the asset was checked out, and any additional details that were added.
- **User Guide** – A button that launches a PDF version of the user manual for this program.

Saginaw Valley Nursing Inventory System | Home

Saginaw Valley State University
Nursing Inventory System

User: Taylor
 Login time: 07:49:43 PM 04/08/2022
 07:51:53 PM 04/08/2022

[Log Out](#)

Home
 View Inventory
 Manage Inventory
 Generate Reports
 Check-In/Out Assets
 Settings

Welcome!

Low Stock Commodities

Name	Quantity
Socks	2

Checked Out Asset Equipment

Commodity Name	Username	Email	Date	Details
IV Training Arm	Dunell P	depigee@svsu.edu	4/7/2022 10:12 PM	
Sim Low Test 1	Master Chief	chief117@svsu.edu	4/8/2022 2:54 PM	

[User Guide](#)

Figure 3.0

View Inventory

The **View Inventory** option allows the user to search for specific commodities and view general or detailed information about the commodities. Shown below in figure 4.0 is the starting screen the user will see.

Figure 4.0

To search for commodities, the user must enter the following information:

- **Item Type** – The main classification of the commodity. *Ex: Consumable, Equipment, or Simulator.*
- **Category** – The sub-classification the commodity is associated with. *Ex: Asset, Consumable, High Fidelity Simulator, PPE, etc.*
- This will generate a list of supplies that meet the specified criteria, which will be displayed in a list in the left-hand output area. An example of this is shown in figure 4.1 on page 15.

The screenshot shows the 'View Inventory' page. On the left is a navigation menu with links: Home, View Inventory (highlighted), Manage Inventory, Generate Reports, Check-In/Out Assets, and Settings. The main content area has a 'Search:' field at the top. Below it is a 'Filter Fields' section with 'Item Type:' set to 'Simulator' and 'Category:' set to 'High Fidelity Simulator'. A 'Category Reset' button is next to the category dropdown. The left-hand output area lists the following items: MedVision Adult Patient Simulator, MedVision Infant Patient Simulator, MedVision Pediatric Patient Simulator, Sim High test 3, and Sim High test 4. The right-hand output area is a table with headers: Quantity, N-Level, Room, and Cabinet, but it is currently empty.

Figure 4.1

- The results can 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 below in figure 4.2.

This screenshot shows the 'View Inventory' page after a search for 'gloves'. The 'Search:' field now contains the text 'gloves'. In the 'Filter Fields' section, 'Item Type:' is set to 'Consumable' and 'Category:' is set to 'PPE'. The left-hand output area now lists 'Non-Latex Gloves'. The right-hand table, with headers 'Quantity', 'N-Level', 'Room', and 'Cabinet', remains empty.

Figure 4.2

- Clicking on a commodity once will display more information 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 below in figure 4.3.

The screenshot shows the 'View Inventory' page. On the left is a sidebar with links: Home, View Inventory (selected), Manage Inventory, Generate Reports, Check-In/Out Assets, and Settings. The main area has a search bar and filter fields for 'Item Type' and 'Category', both set to 'Consumable'. Below the filters is a list of commodities, with 'CottonBalls' selected. To the right of the list is a table showing inventory details for 'CottonBalls'.

Quantity	N-Level	Room	Cabinet
1052	2	HE 111	Cabinet 2
1	NP	HH 314	Cabinet 1
4	1	HE 230	Cabinet 1
1	1	HE 110	new
80	1	HE 222	Cabinet 1

Figure 4.3

- Double-clicking on a commodity will cause a popup window containing more information about the selected commodity to appear, including features, cost, alert quantity, etc. An example of this is shown below in figure 4.4.

This screenshot is similar to Figure 4.3, but with a 'Commodity Details' popup window open over the 'CottonBalls' commodity. The popup provides additional information about the selected item.

Commodity Details

Name: CottonBalls
 Description: pack of cotton balls
 Type: Consumable
 Features:
 Alert Quantity: 1000
 Commodity Type: Consumable
 Cost: \$45.00
 URL:

OK

Figure 4.4

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 5.0 is the starting screen the user will see.

The screenshot shows the 'Use Existing Item' screen. On the left is a sidebar with navigation links: Home, View Inventory, Manage Inventory (highlighted), Generate Reports, Check-In/Out Assets, and Settings. The main content area has a tabbed interface with 'Use Item' selected. Below the tabs is a 'By Room' tree view listing rooms from HHS 110 to HHS 516. To the right of the tree are input fields for 'Item Name:', 'Category:', and 'Type:'. Below these is a quantity calculation section with 'Available Qty', 'Used Qty' (containing the value '1'), and 'New Total Qty'. At the bottom right are 'Use' and 'Reset' buttons.

Figure 5.0

- The *By Room* tree is used to display the organizational structure of the system in a hierarchical manner using the following four tiers shown below in figure 5.1.

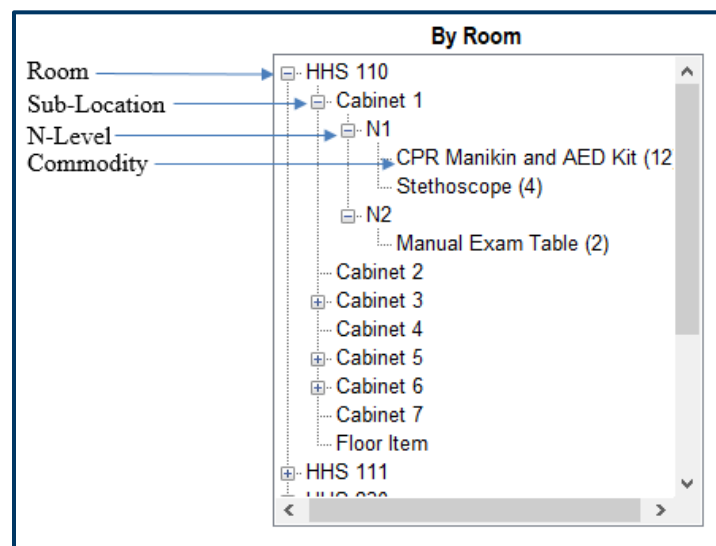





Figure 5.1

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 sub-classification the commodity is associated with. *Ex: Asset, Consumable, High Fidelity Simulator, PPE, etc.*
 - **Type** – The main classification of the commodity. *Ex: Consumable, Equipment, or Simulator.*
 - **Available Qty.** – Total quantity on-hand in the specified location.
- Enter the number you want to consume in the **Used Qty.** field. This will automatically calculate and display the new total in the **New Total Qty.** field.
- Clicking the **Use** button will consume the commodity and generate a popup message to show it was successful, as shown in figure 5.2 on page 20.
- Clicking the **Reset** button will clear the fields for the currently selected commodity.

The screenshot shows the 'Use Existing Item' interface. On the left is a sidebar with navigation links: Home, View Inventory, Manage Inventory (highlighted), Generate Reports, Check-In/Out Assets, and Settings. The main area has a top bar with 'Use Item' and sub-links: Create / Modify, Add Stock for Existing Item, Move Stock, and Delete Item. Below this is a 'By Room' tree view showing a hierarchy of rooms (HHS 110, 111, 230, 240, 314, 327, 400, 402, 515) and cabinets (Cabinet 1-6, Floor Item). The right side displays item details: Item Name: Sterile Alcohol Prep Pad, Category: Consumable, and Type: Consumable. Below these are three input fields: Available Qty (450), Used Qty (10), and New Total Qty (440), with a minus sign between the first two. A small modal window in the center says 'Item used successfully.' with an 'OK' button. At the bottom right are 'Use' and 'Reset' buttons.

Figure 5.2

- *Note:* Commodities 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, as shown below in figure 5.3.

The screenshot shows the 'Use Existing Item' interface for a simulator. The sidebar and top bar are identical to Figure 5.2. The 'By Room' tree view shows a different hierarchy, including 'Cotton Balls (42)', 'MedVision Infant Patient Sim', and 'Surgical Mask (1000)'. The right side displays item details: Item Name: MedVision Infant Patient Simulator, Category: High Fidelity Simulator, and Type: Simulator. Below these are three input fields: Current Hours (0), Used Hours (4), and New Total Hours (4), with a plus sign between the first two. At the bottom right are 'Use' and 'Reset' buttons.

Figure 5.3

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 5.4 is the starting screen the user will see.

Figure 5.4

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 sub-classification the commodity is associated with. *Ex: Asset, Consumable, High Fidelity Simulator, PPE, etc.*
 3. **Type** – The main classification of the commodity. *Ex: Consumable, Equipment, or Simulator.*
 4. **Description** – Information about the commodity.
- Enter the commodity information for any optional fields.

- Clicking the **Create** button will display a confirmation message that the creation was successful as shown below in figure 5.5.
- Clicking the **Cancel** button will clear the input fields.

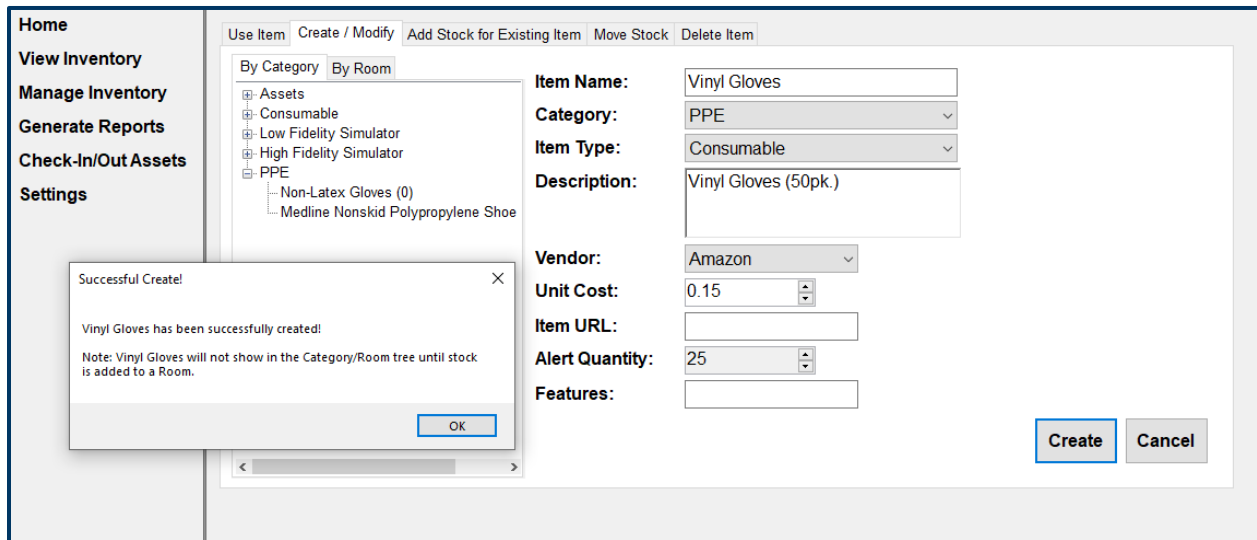


Figure 5.5

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 in figures 5.6 and 5.7 on page 23.
- 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 display a confirmation message that the modification was successful as shown in figure 5.8 on page 23.
- Clicking the **Cancel** button will clear the input fields.

By Category By Room

- ☐ Asset
- ☐ Consumable
- ☐ Low Fidelity Simulator
- ☐ High Fidelity Simulator
- ☐ PPE

Figure 5.6

By Category By Room

- ☐ HHS 110
- ☐ HHS 111
- ☐ HHS 230
- ☐ HHS 240
- ☐ HHS 314
- ☐ HHS 327
- ☐ HHS 400
- ☐ HHS 515
- ☐ HHS 516

Figure 5.7

Home
View Inventory
Manage Inventory
Generate Reports
Check-In/Out Assets
Settings

Use Item Create / Modify Add Stock for Existing Item Move Stock Delete Item

By Category By Room

- ☐ Assets
- ☐ Consumable
- ☐ Low Fidelity Simulator
- ☐ High Fidelity Simulator
- ☐ PPE
 - Non-Latex Gloves (0)
 - Medline Nonskid Polypropylene Shoe
 - Vinyl Gloves (0)

Item Name: Vinyl Gloves

Category: PPE

Item Type: Consumable

Description: Vinyl Gloves (50pk.)

Vendor: Medline

Unit Cost: 0.12

Item URL:

Alert Quantity: 25

Features:

Successful Modify!

Vinyl Gloves has been successfully modified!

OK

Modify Cancel

Figure 5.8

Add Stock for Existing Item

Manage Inventory → Add Stock for Existing Item

The **Add Stock for Existing Item** operation allows the user to add to the existing quantity for a specified commodity. Shown below in figure 5.9 is the starting screen the user will see.

The screenshot shows a web application interface for managing inventory. On the left is a sidebar menu with the following items: Home, View Inventory, Manage Inventory (highlighted), Generate Reports, Check-In/Out Assets, and Settings. The main content area has a tabbed interface with tabs for 'Use Item', 'Create / Modify', 'Add Stock for Existing Item' (selected), 'Move Stock', and 'Delete Item'. The 'Add Stock for Existing Item' form contains the following fields:

- Category:** A dropdown menu with 'Asset' selected.
- Commodity:** An empty dropdown menu.
- Update the quantity for this Commodity for the following Room, Cabinet, and N Level:** A heading for the location selection.
- Room:** An empty dropdown menu.
- Cabinet:** An empty dropdown menu.
- N Level:** An empty dropdown menu.
- Current Quantity:** A text input field containing the value '0'.
- Additional Quantity:** A spinner control with the value '1'.
- Buttons:** 'Add' and 'Cancel' buttons at the bottom right of the form.

Figure 5.9

To add stock to a commodity, the user must do the following:

- Input the following information:
 1. **Category** – The sub-classification the commodity is associated with. *Ex: Asset, Consumable, High Fidelity Simulator, PPE, etc.*
 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.

- Clicking the **Add** button will update the quantity. An example of this is shown below in figure 5.10.
- Clicking the **Cancel** button will clear the current input fields.

The screenshot displays the 'Add Stock for Existing Item' form within a web application. On the left is a sidebar with navigation links: Home, View Inventory, Manage Inventory, Generate Reports, Check-In/Out Assets, and Settings. The main content area has a tabbed interface with 'Add Stock for Existing Item' selected. The form contains the following elements:

- Category:** A dropdown menu set to 'Consumable'.
- Commodity:** A dropdown menu set to 'Cotton Balls'.
- Update the quantity for this Commodity for the following Room, Cabinet, and N Level**
- Room:** A dropdown menu set to 'HHS 110'.
- Cabinet:** A dropdown menu set to 'Cabinet 1'.
- N Level:** A dropdown menu set to 'N1'.
- Current Quantity:** A text input field containing '0'.
- Additional Quantity:** A text input field containing '50'.
- Buttons:** 'Add' (highlighted in blue), 'Cancel' (greyed out), and 'OK' (in the success dialog).

A success message dialog box is open in the center, stating: 'Successfully added a quantity of 50 Cotton Balls in room HHS 110, Cabinet 1.' with an 'OK' button.

Figure 5.10

Move Stock

Manage Inventory → Move Stock

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

Shown below in figure 5.11 is the starting screen the user will see.

Figure 5.11

To move stock between locations, the user must do the following:

- Input the following information:
 1. **Category** - The category the commodity falls under.
 2. **Commodity** – The name of the commodity.
 3. **Room** – The source and destination room number.
 4. **Cabinet** – The source and destination cabinet location.
 5. **N Level** – The source and destination N-Level the commodity belongs to.
 6. **Quantity to Move** – The amount being moved from the source to the destination.

- Clicking the **Move** button will transfer the commodity from the source to the destination location. An example of this is shown below in figure 5.12.
- Clicking the **Reset** button will clear the current input fields.

The screenshot shows the 'Move Existing Item' form in the inventory management system. The form is divided into several sections:

- Category:** Consumable (dropdown)
- Commodity:** Cotton Balls (dropdown)
- Source:** Select location to withdraw the item from.
 - Room:** HHS 110 (dropdown)
 - Cabinet:** Cabinet 1 (dropdown)
 - N Level:** N1 (dropdown)
- Available:** 50 (text input)
- Quantity to Move:** 20 (text input with up/down arrows)
- Destination:** Select location to deposit the item to.
 - Room:** HHS 515 (dropdown)
 - Cabinet:** Floor Item (dropdown)
 - N Level:** N/A (dropdown)

At the bottom right, there are two buttons: **Move** (highlighted with a blue border) and **Reset**. A success dialog box is centered on the screen, displaying the message 'Item(s) moved successfully.' with an 'OK' button.

Figure 5.12

Delete Item

Manage Inventory → Delete Item

This **Delete Item** operation allows the user to delete an existing commodity from the system and all locations. Shown below in figure 5.13 is the starting screen the user will see.

Figure 5.13

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

- Input the following information:
 1. **Category** – The sub-classification the commodity is associated with. *Ex: Asset, Consumable, High Fidelity Simulator, PPE, etc.*
 2. **Commodity** – The name of the commodity.
- Once the user has inputted 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 **Reset** button, the input fields will be cleared.

- If the user clicks the **Confirm** button, they will receive a final warning message asking if they want to proceed. If the user clicks **No**, the operation will be canceled. If the user clicks **Yes**, the commodity will be permanently deleted from the system. An example of this is shown below in figure 5.14.

Home
View Inventory
Manage Inventory
Generate Reports
Check-In/Out Assets
Settings

Use Item Create / Modify Add Stock for Existing Item Move Stock Delete Item

Delete Existing Item

Category: PPE
Commodity: Gloves

Deletion of this commodity will log all inventory as disposed of and will no longer be available to use.
Below is a change report, please review below before proceeding.
This action is PERMENANT and cannot be reversed.

Change Log: These are the changes to be made.

	Room	# To Purge
▶	HHS 314	50
	HHS 110	100

Confirm

Are you sure you want to delete this commodity?

Yes No

Confirm Reset

Figure 5.14


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 toolbar, as shown below in figure 6.0.

- Users can navigate reports using the arrow icons and the page number text box shown below in section #1.
- Users can refresh the report results using the  icon.
- Users can print, adjust the page setup/display, and save the report to either Excel, PDF, or a Word document shown below in section #2.
- Users can search the report for a keyword using the textbox shown below in section #3.

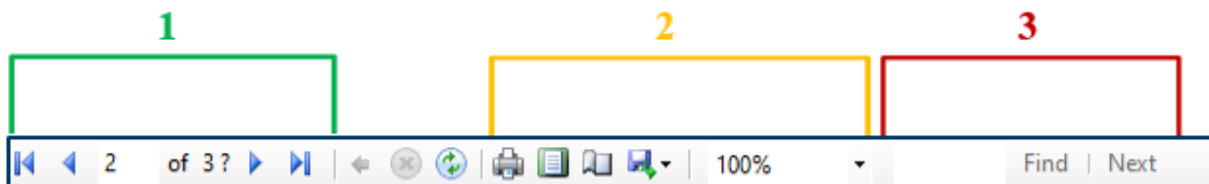


Figure 6.0

Activity Log

Generate Reports → Activity Log

The **Activity Log** report displays all transactions that have occurred in the inventory management system as shown below in figure 6.1. 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.

Home View Inventory Manage Inventory Generate Reports Print Barcodes Check-In/Out Items Settings	Reports					
	Activity Log Simulator Use Low Stock Dynamic Items					
	1 of 3 100% Find Next					
	Activity Log					
	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

Figure 6.1

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 to graphically display the information from the table.

An example of this report is shown below in figure 6.2.

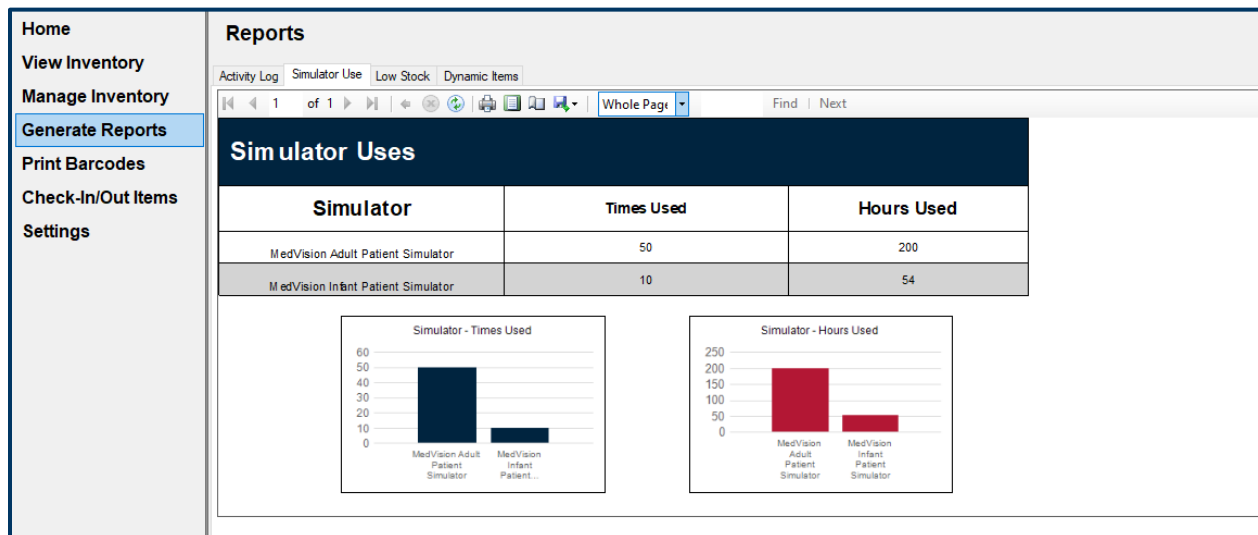


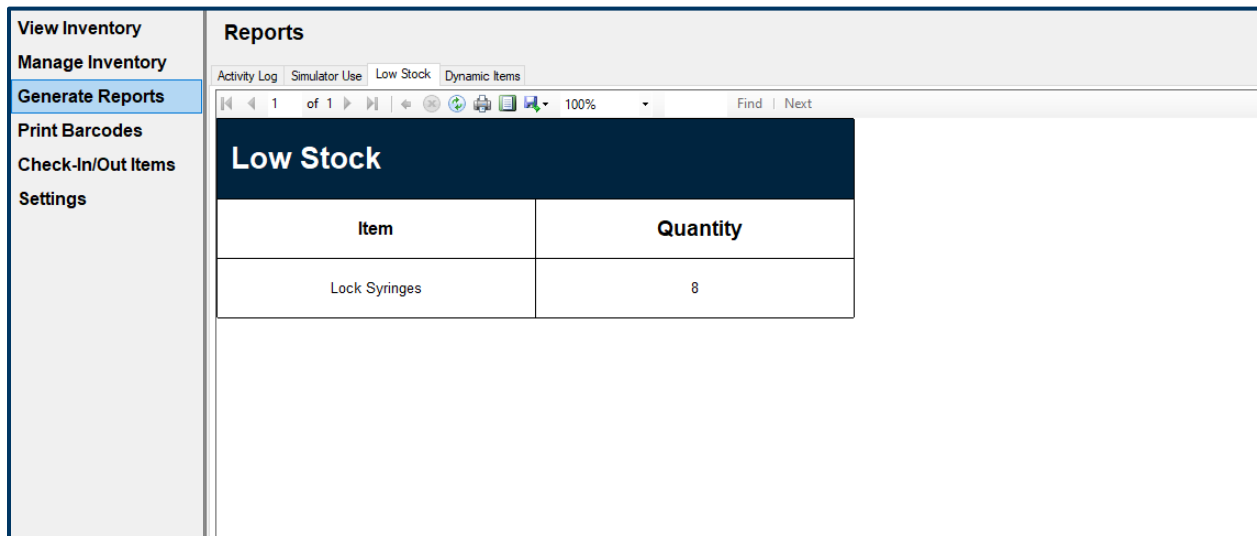
Figure 6.2

Low Stock

Generate Reports → Low Stock

The **Low Stock** report displays a table containing all the commodities that are at or below their designated low stock threshold, as shown below in figure 6.3. The table consists of the following columns:

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



Low Stock	
Item	Quantity
Lock Syringes	8

Figure 6.3

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, as shown below in figure 6.4. The table 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.

View Inventory Manage Inventory Generate Reports Print Barcodes Check-In/Out Items Settings	Reports		
	Activity Log Simulator Use Low Stock Dynamic Items		
	1 of 1 100% Find Next		
	Dynamic Items		
	Item	Times Updated	Number Added
	Cotton Balls	11	199
	CPR Manikin and AED Kit	1	5
	Lock Syringes	2	0
	Non-Latex Gloves	4	300
	Sterile Alcohol Prep Pad	1	0

Figure 6.4

Check-In/Out Items

The **Check-In/Out Items** option is used for checking in/out asset equipment to students. 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, as shown below in figure

7.0. The user will be required to input the following information:

1. **Student** – The name and email address of the student.
 - This can be done by finding and selecting the student from the list of students or by using the **Student Search** bar and typing in the student's name or email address. Doing this will update the student list in real-time to narrow the results.
2. **Commodity** – The name of the asset being checked out.
3. **Notes** – An optional field to store any additional information in.
 - The **Available Quantity** for a commodity will be displayed upon selection.

Figure 7.0

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 below in figure 7.1, will be displayed.
 - Clicking **Yes** will complete the checkout process.
 - Clicking **No** will cancel the checkout process.

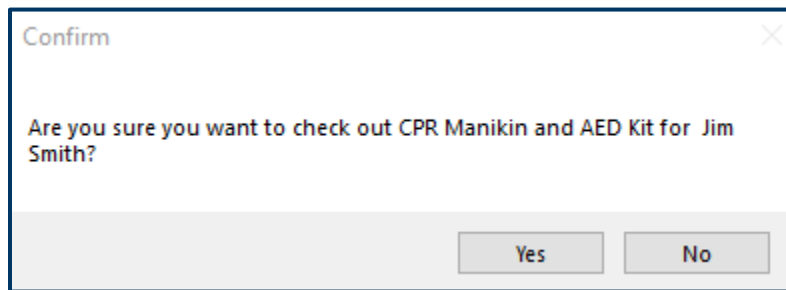


Figure 7.1

2. A warning message, shown below in figure 7.2, will be displayed if the student already has the selected asset checked out.

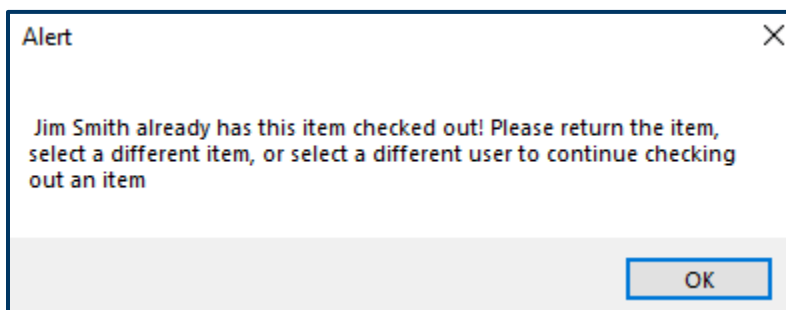


Figure 7.2

Check In

Check-In/Out Items → Check In

The **Check In** operation is used to check-in an asset from a student, as shown below in figure

7.3. The user will be required to input the following information:

1. **Student** – The name and email address of the student.
 - This can be done by finding and selecting the student from the list of students or by using the **Student Search** bar and typing in the student's name or email address. Doing this will update the student list in real-time to narrow the results.
2. **Commodity** – The name of the asset being checked in.

Figure 7.3

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 7.4 on page 39.

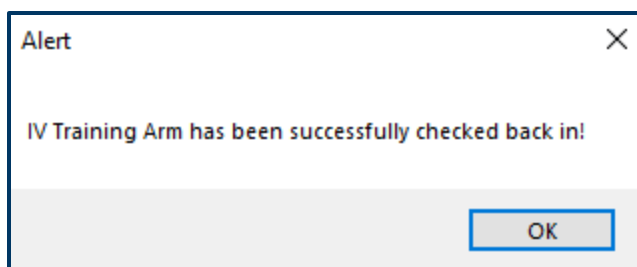


Figure 7.4

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 8.0 is the initial screen the user will see.

The screenshot shows the 'Users' management page. On the left sidebar, 'Settings' is selected. The main area has tabs for 'Users', 'Rooms', 'Cabinets', 'Categories', 'Vendors', and 'N-Level'. The 'Users' tab is active, showing a list of users. One user, 'Adams, Luke - lsadams1@svsu.edu', is selected. To the right of the list is a form for editing this user. The form contains the following fields: SVSU ID (444555), First Name (Luke), Last Name (Adams), Email (lsadams1@svsu.edu), Phone, and an 'Admin?' checkbox. To the right of the form are five buttons: 'Mass Upload Students', 'Add User', 'Modify User', 'Reset Password', and 'Delete User'.

Figure 8.0

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.

Five operations can be performed regarding user management:

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

- Upon clicking the **Mass Upload Students** button, a file explorer window will appear. You will then navigate to the location of the .csv file you want to use, as shown below in figure 8.1.

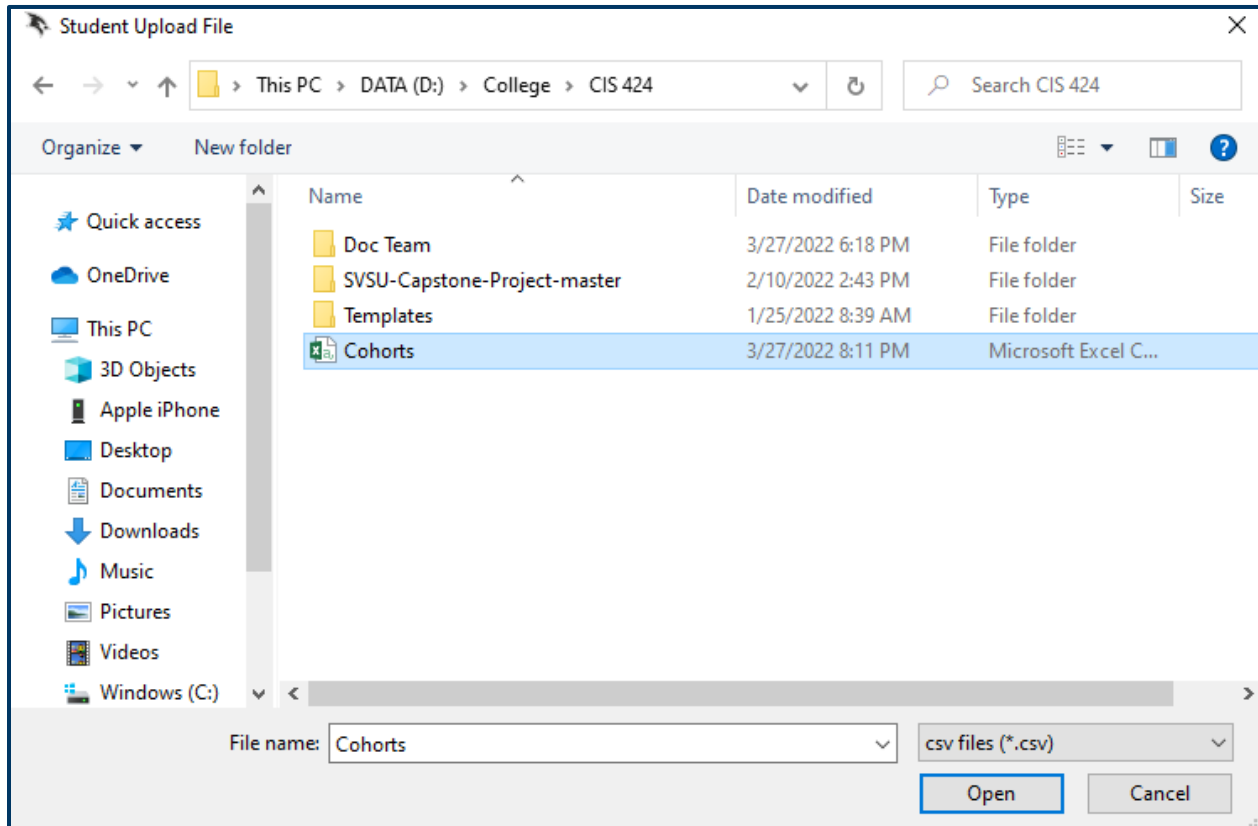


Figure 8.1

- Upon opening the .csv file, the user will receive a confirmation message stating how many students it is attempting to upload and asking if the user wishes to continue, as shown in figure 8.2 on page 43.

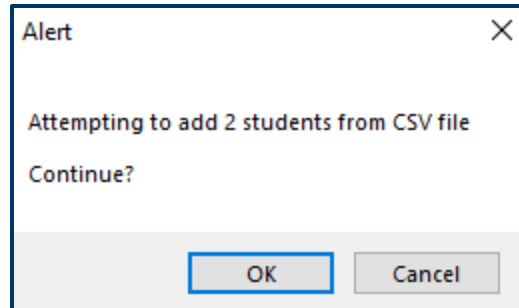


Figure 8.2

- Clicking **Cancel** will cancel the operation.
- Clicking **OK** will attempt to load in the new users.
 - If the upload is successful, the user will receive the success message shown in figure 8.3 and the new users will appear in the user list.
 - If the upload is unsuccessful, the user will receive the error message shown in figure 8.4.

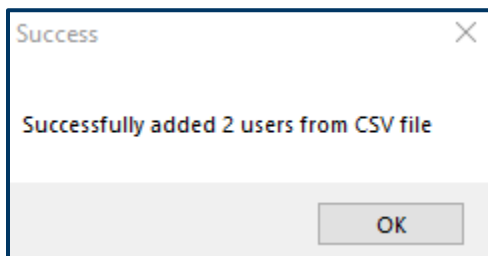


Figure 8.3

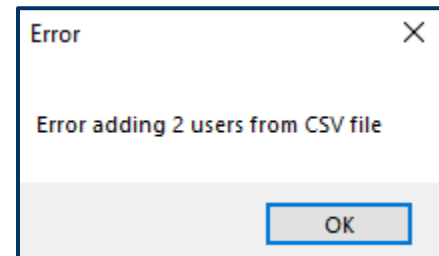


Figure 8.4

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

- Upon clicking the **Add User** button, all input fields will be unlocked and two new buttons will appear; **Save User** and **Cancel**. The user will then enter 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 below in figure 8.5.

The screenshot shows the 'Add User' form in the SVSU system. The form is titled 'User' and has a list of existing users on the left. The main form fields are: SVSU ID (998897), First Name (Steve), Last Name (Allen), Email (srallen@svsu.edu), and Phone (blank). There is a checkbox for 'Admin?' which is unchecked. To the right of the form are buttons for 'Mass Upload Students', 'Add User', 'Modify User', 'Reset Password', and 'Delete User'. A 'Save User' button is highlighted in blue. A confirmation dialog box is open, asking 'Are you sure you want to add srallen@svsu.edu as a new user?' with 'Yes' and 'No' buttons.

Figure 8.5

- Clicking **No** will cancel the operation.
 - Clicking **Yes** will display a confirmation message that the addition was successful.
- *Note:* All fields except for phone number and admin status are required. If a user leaves any of these fields blank, they will receive an error message as shown in figure 8.6 on page 45.

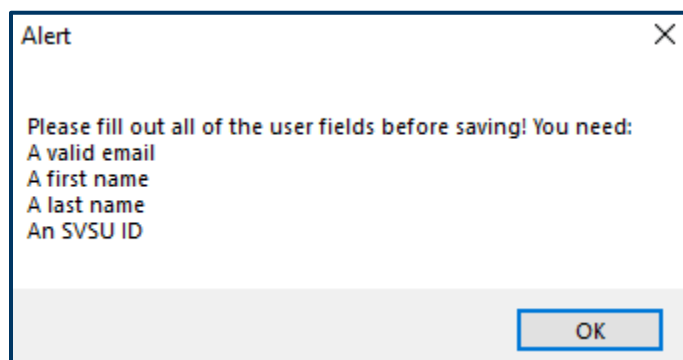


Figure 8.6

3. **Modify User** – This 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 input fields will be unlocked and two new buttons will appear; **Save User** and **Cancel**. The user can then modify 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 below in figure 8.7.

The screenshot shows the 'Users' management interface. On the left is a sidebar with navigation links: Home, View Inventory, Manage Inventory, Generate Reports, Check-In/Out Assets, and Settings. The main content area has tabs for Users, Rooms, Cabinets, Categories, Vendors, and N-Level. The 'Users' tab is active, showing a list of users. 'Adams, Luke - lsadams1@svsu.edu' is selected. To the right of the list is a form for editing the user. The form includes fields for SVSU ID (444555), First Name (Luke), Last Name (Adams), Email (lsadams1@svsu.edu), and Phone. There are also buttons for 'Mass Upload Students', 'Add User', 'Modify User', 'Reset Password', and 'Delete User'. A 'Save User' button and a 'Cancel' button are also present. A confirmation dialog box is open, asking 'Are you sure you want to modify lsadams1@svsu.edu's user profile to current field values?' with 'Yes' and 'No' buttons.

Figure 8.7

- Clicking **No** will cancel the operation.
- Clicking **Yes** will display a confirmation message that the modification was successful.

4. **Delete User** – This allows for the deletion of a user.

- Upon selecting the user 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 below in figure 8.8.

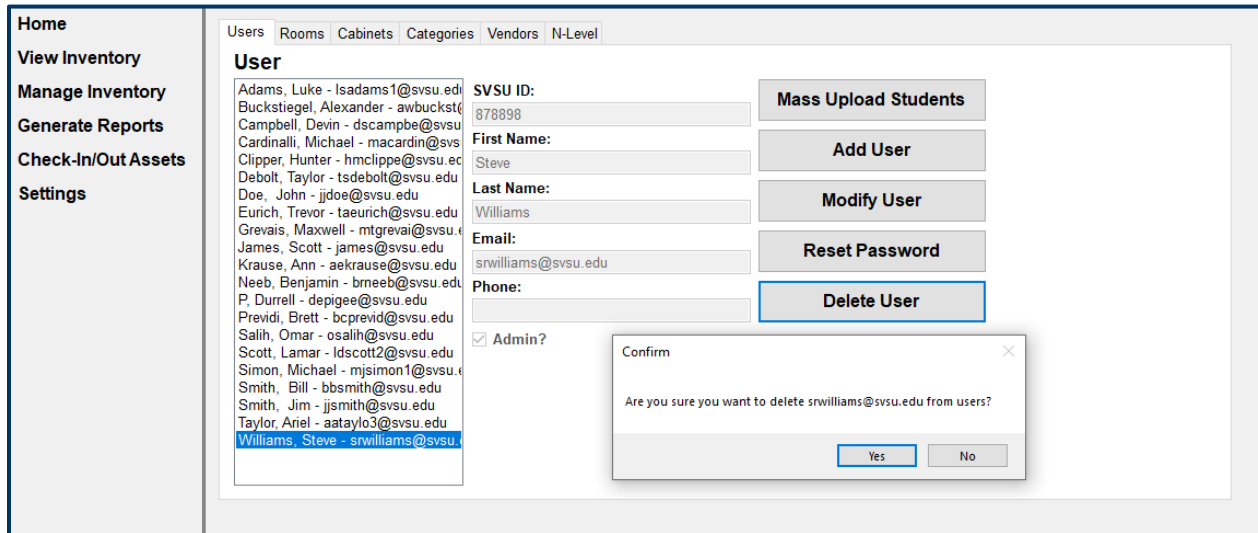


Figure 8.8

- Clicking **No** will cancel the operation.
- Clicking **Yes** will display a confirmation message that the deletion was successful.

5. Mass Delete Students – This allows for the deletion of multiple users.

- Upon clicking the **Mass Delete Students** button, the user will be prompted to select all the users they want to delete, as shown below in figure 8.9.

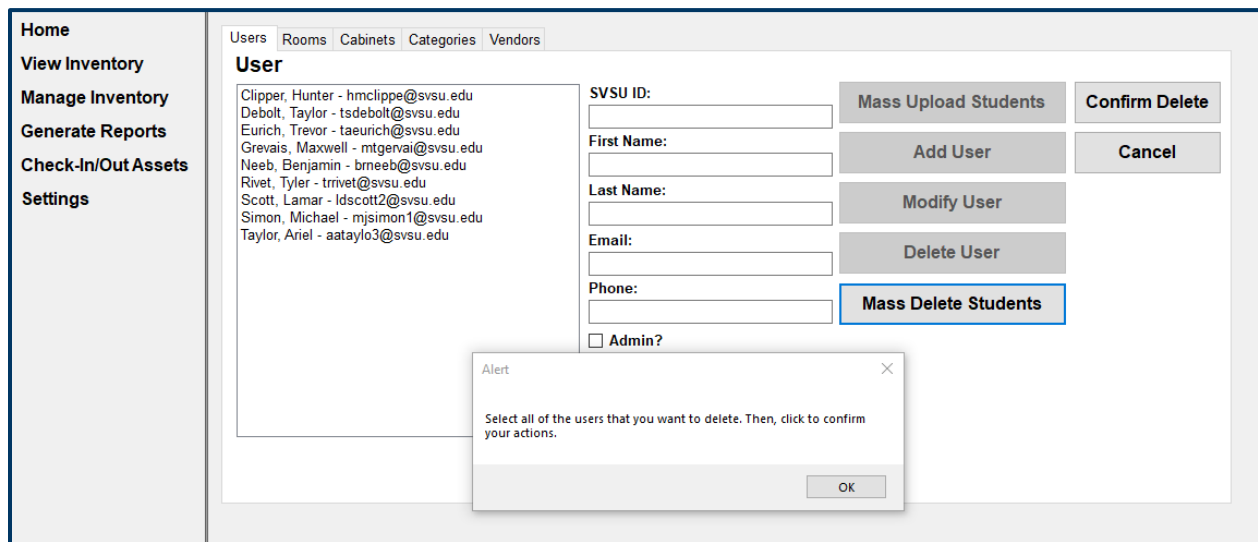


Figure 8.9

- After selecting the users you want to delete and clicking the **Confirm Delete** button, you will receive a warning asking you to confirm the deletion, as shown below in figure 8.10.
- Clicking **No** will cancel the operation.
- Clicking **Yes** will display a confirmation message that the deletion was successful.

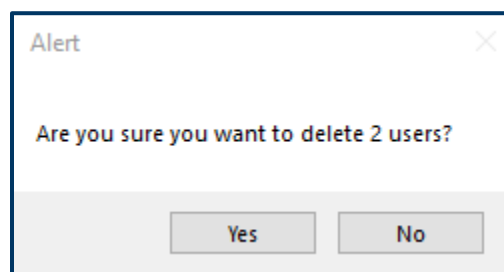


Figure 8.10

Rooms

Settings → Rooms

The **Rooms** setting allows administrative users to manage all the rooms in the system. Shown below in figure 8.11 is the initial screen users will see.

The screenshot shows the 'Rooms' management interface. On the left is a sidebar with a menu containing: View Inventory, Manage Inventory, Generate Reports, Print Barcodes, Check-In/Out Items, and Settings (which is highlighted). The main content area has a tabbed interface with 'Users', 'Rooms', 'Cabinets', 'Categories', 'Vendors', and 'N-Level'. The 'Rooms' tab is active, displaying a list of rooms on the left and a form on the right. The room list includes HE 110 (selected), HE 111, HE 230, HE 240, HE 314, HE 327, HE 400, HE 402, HE 515, and HE 516. The form on the right shows 'Room Name' as 'HE 110' and 'Room Description' as 'HE 110 Description'. To the right of the form are three buttons: 'Add Room', 'Modify Room', and 'Delete Room'.

Figure 8.11

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.

Three operations can be performed regarding 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 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 below in figure 8.12.

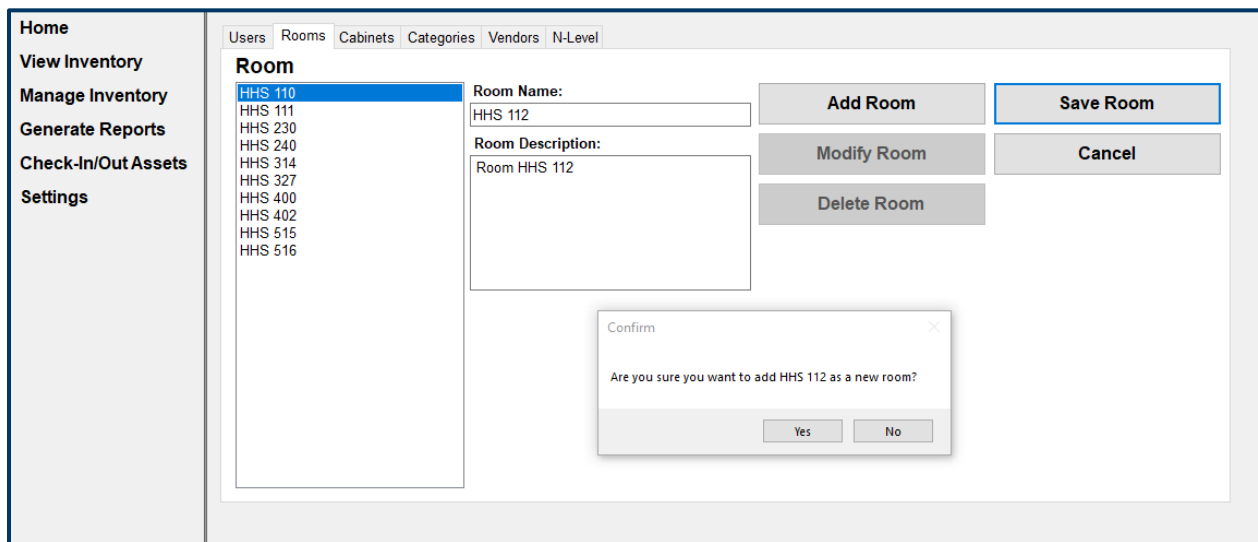


Figure 8.12

- Clicking **No** will cancel the operation.
- Clicking **Yes** will display a confirmation message that the addition was successful.

2. **Modify Room** – This 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 modify 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 below in figure 8.13.

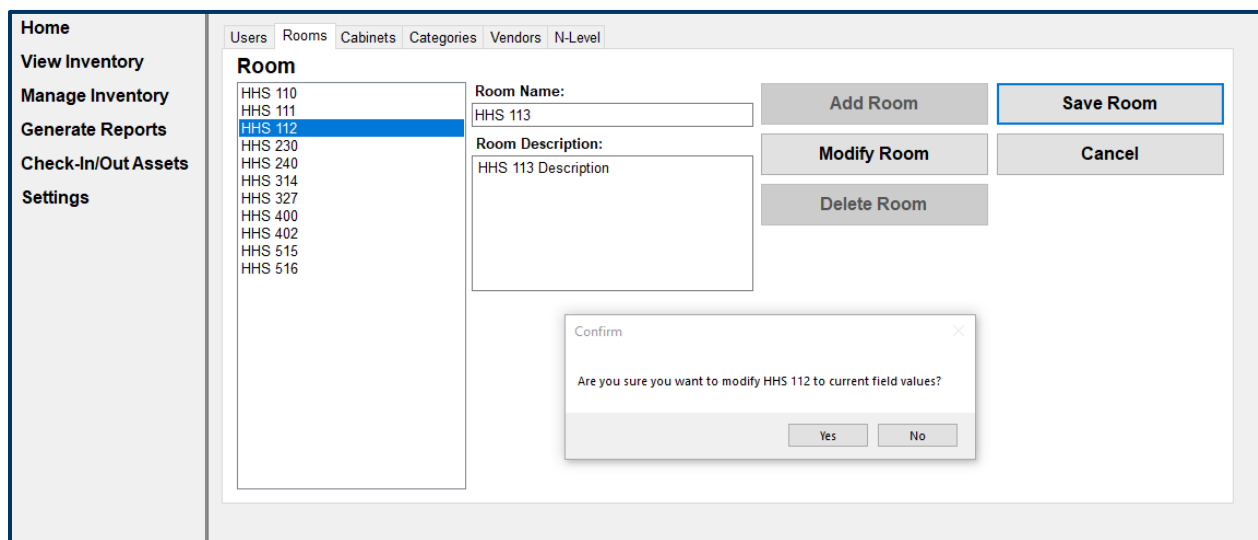


Figure 8.13

- Clicking **No** will cancel the operation.
- Clicking **Yes** will display a confirmation message that the modification was successful.

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

- Upon selecting the room 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 below in figure 8.14.

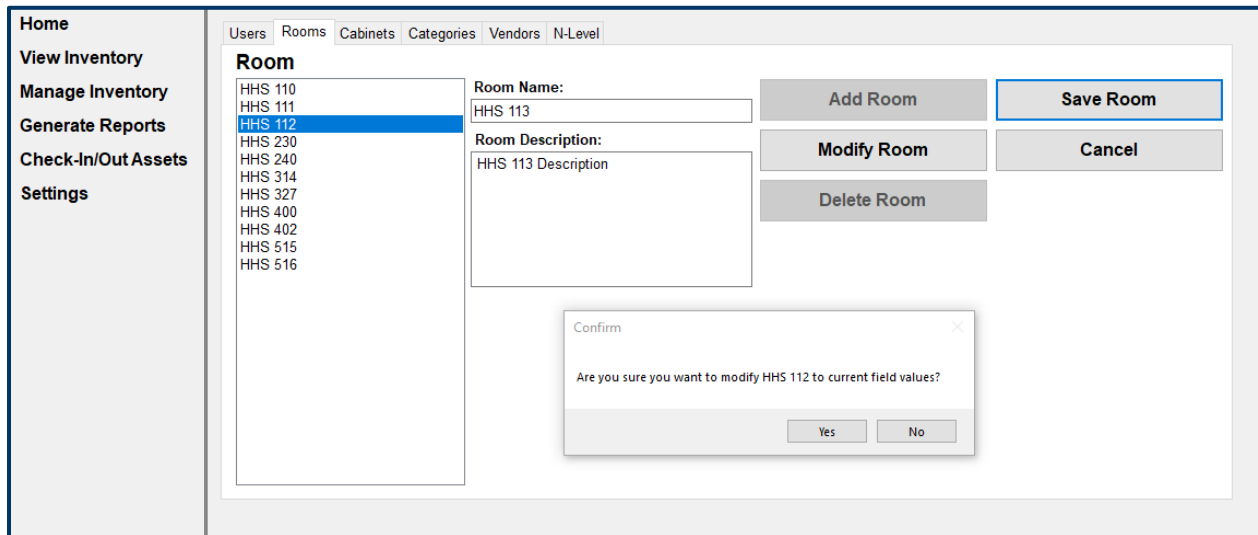


Figure 8.14

- Clicking **No** will cancel the operation.
- Clicking **Yes** will display a confirmation message that the deletion was successful.

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 8.15 is the initial screen users will see.

Figure 8.15

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.

Three operations can be performed regarding 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 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 below in figure 8.16.

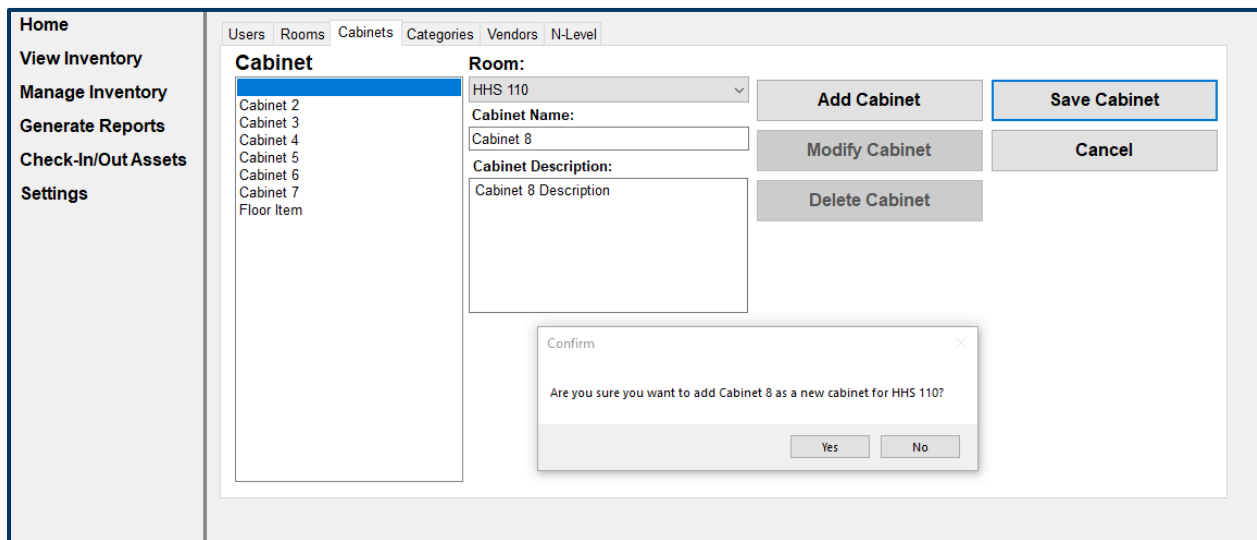


Figure 8.16

- Clicking **No** will cancel the operation.
- Clicking **Yes** will display a confirmation message that the addition was successful.

2. **Modify Cabinet** – This 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 modify 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 below in figure 8.17.

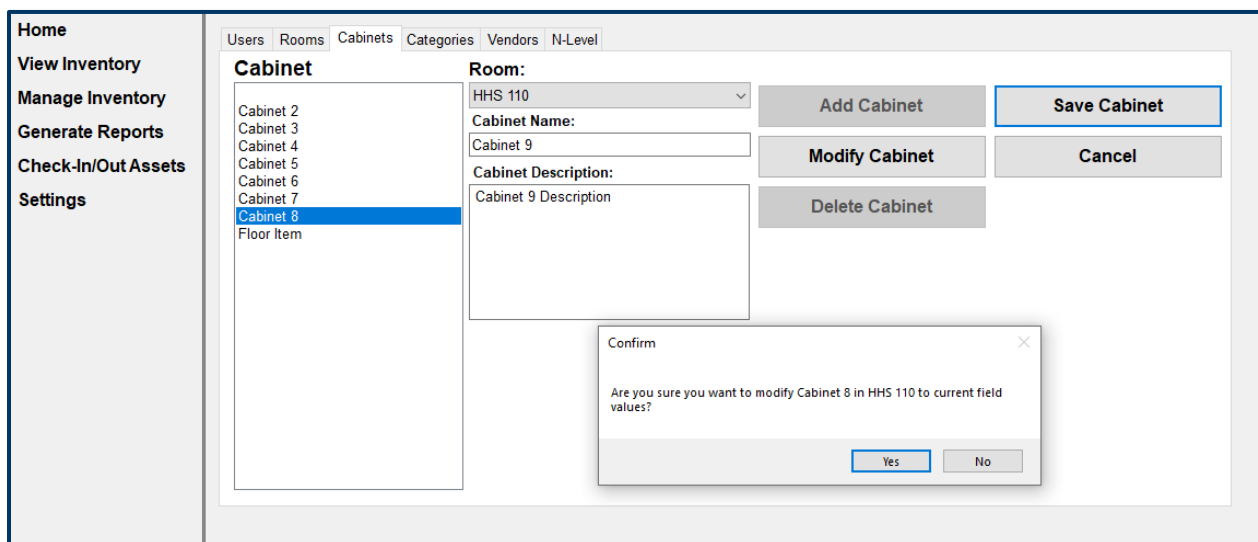


Figure 8.17

- Clicking **No** will cancel the operation.
- Clicking **Yes** will display a confirmation message that the modification was successful.

3. **Delete Cabinet** – This 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 below in figure 8.18.

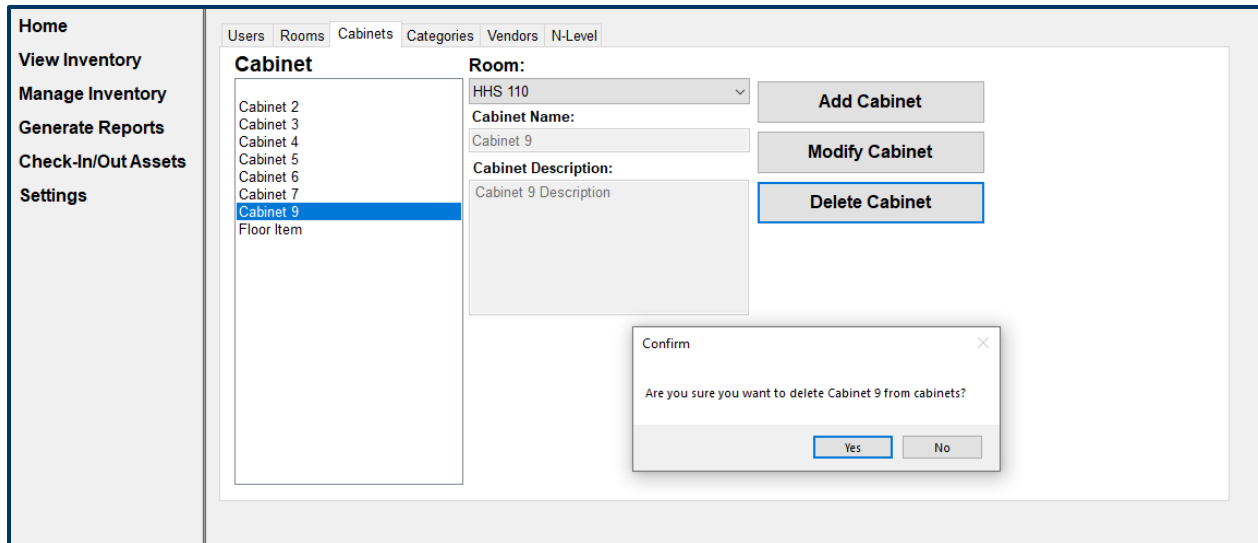


Figure 8.18

- Clicking **No** will cancel the operation.
- Clicking **Yes** will display a confirmation message that the deletion was successful.

Categories

Settings → Categories

The **Categories** setting allows administrative users to manage all the categories in the system.

Shown below in figure 8.19 is the initial screen users will see.

Figure 8.19

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

- **Category Name** – The name of the category.
- **Category Description** – Additional details about the category.

Three operations can be performed regarding category management:

1. Add Category – Adds a new category to the system

- Upon clicking the **Add Category** button, all fields will be unlocked and two new buttons will appear; **Save Category** and **Cancel**. The user will then enter the new category's information.
- Upon clicking the **Save Category** button, the user will receive a confirmation message asking if they want to add the category, as shown below in figure 8.20.

The screenshot shows a web application interface for managing categories. On the left is a sidebar with navigation links: Home, View Inventory, Manage Inventory, Generate Reports, Check-In/Out Assets, and Settings. The main content area has a tabbed interface with tabs for Users, Rooms, Cabinets, Categories, Vendors, and N-Level. The 'Categories' tab is selected. The 'Category' form is displayed, featuring two input fields: 'Category Name' (containing 'Equipment') and 'Category Description' (containing 'Equipment Description'). To the right of these fields are four buttons: 'Add Category', 'Save Category' (which is highlighted with a blue border), 'Modify Category', and 'Delete Category'. A 'Confirm' dialog box is open in the foreground, asking the user 'Are you sure you want to add Equipment as a new category?' with 'Yes' and 'No' response buttons.

Figure 8.20

- Clicking **No** will cancel the operation.
- Clicking **Yes** will display a confirmation message that the addition was successful.

2. **Modify Category** – This allows for the modification of an existing category in the system.

- Upon selecting the category you want to modify and clicking the **Modify Category** button, all fields will be unlocked and two new buttons will appear; **Save Category** and **Cancel**. The user can then modify the existing category's information.
- Upon clicking the **Save Category** button, the user will receive a confirmation message asking if they want to modify the category, as shown below in figure 8.21.

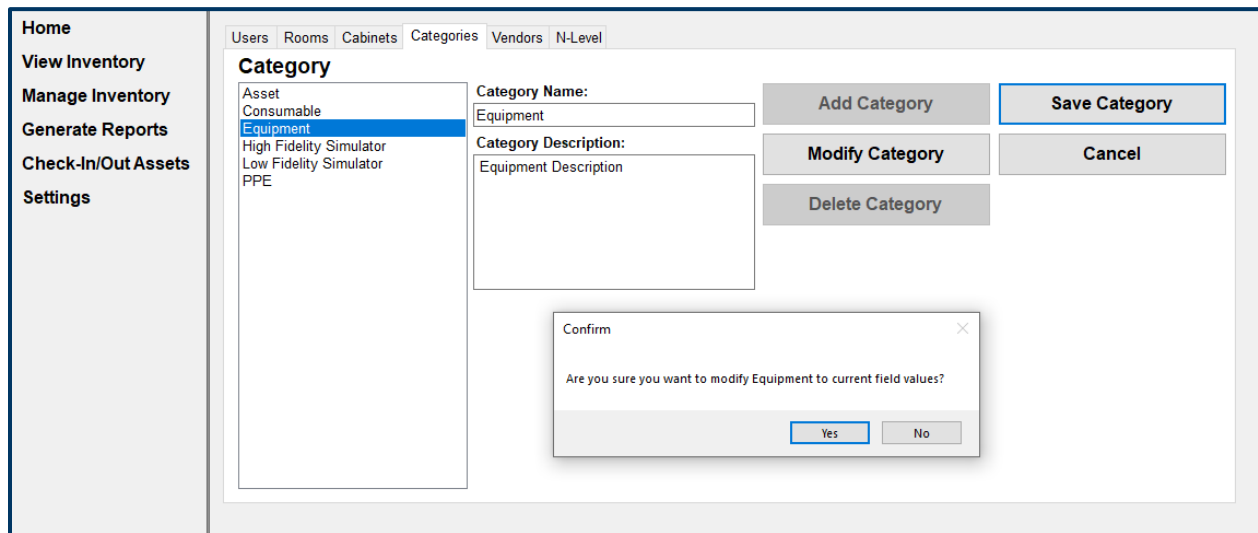


Figure 8.21

- Clicking **No** will cancel the operation.
- Clicking **Yes** will display a confirmation message that the modification was successful.

3. **Delete Category** – This allows for the deletion of an existing category in the system.

- Upon selecting the category you want to delete and clicking the **Delete Category** button, a confirmation message will appear asking if you want to delete the category, as shown below in figure 8.22.

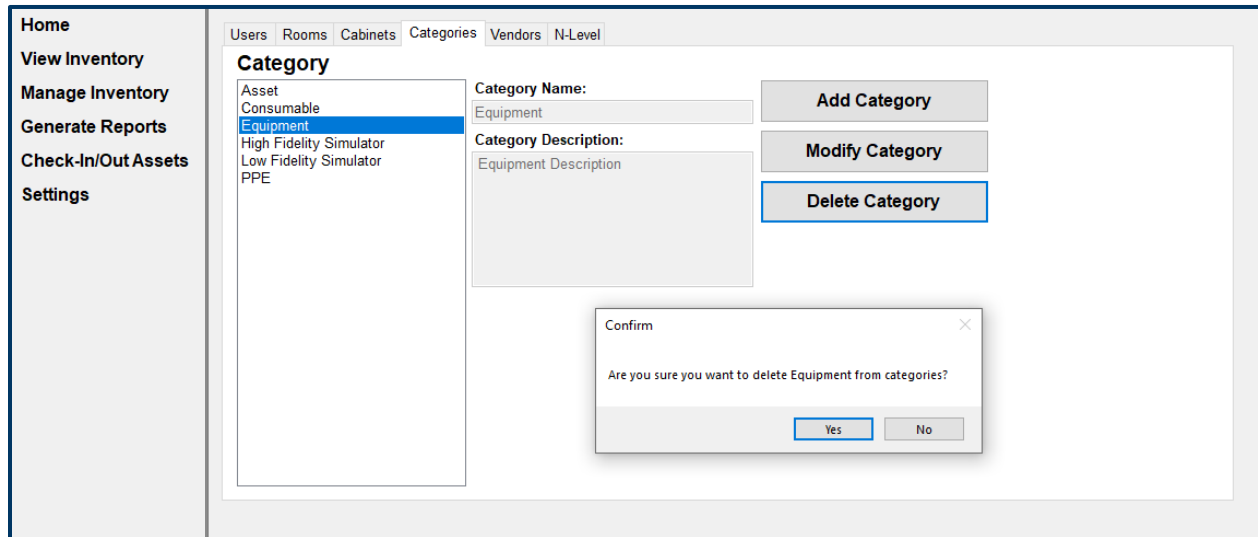


Figure 8.22

- Clicking **No** will cancel the operation.
- Clicking **Yes** will display a confirmation message that the deletion was successful.

Vendors

Settings → Vendors

The **Vendors** setting allows administrative users to manage all the vendors that have been added to the system. Shown below in figure 8.23 is the initial screen users will see.

The screenshot shows the 'Vendors' management screen. On the left is a sidebar with navigation links: Home, View Inventory, Manage Inventory, Generate Reports, Check-In/Out Assets, and Settings (which is highlighted). The main content area has a top navigation bar with tabs for Users, Rooms, Cabinets, Categories, Vendors (selected), and N-Level. Below the tabs, there's a 'Vendor' section. On the left of this section is a list of vendors: Amazon (highlighted), Binsons, GTSimulators, McKesson, Medline, No Vendor, SafeChain, test, and Walgreens. To the right of the list are three input fields: 'Vendor Name' (containing 'Amazon'), 'Homepage' (containing 'www.amazon.com'), and 'Vendor Description' (empty). To the right of these fields are three buttons: 'Add Vendor', 'Modify Vendor', and 'Delete Vendor'.

Figure 8.23

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

- **Vendor Name** – The name of the vendor.
- **Homepage** – The home URL of the vendor's site.
- **Vendor Description** – Additional details about the vendor.

Three operations can be performed regarding vendor management:

1. **Add Vendor** – Adds a new vendor to the system

- Upon clicking the **Add Vendor** button, all fields will be unlocked and two new buttons will appear; **Save Vendor** and **Cancel**. The user will then enter the new vendor's information.
- Upon clicking the **Save Vendor** button, the user will receive a confirmation message asking if they want to add the vendor, as shown below in figure 8.24.

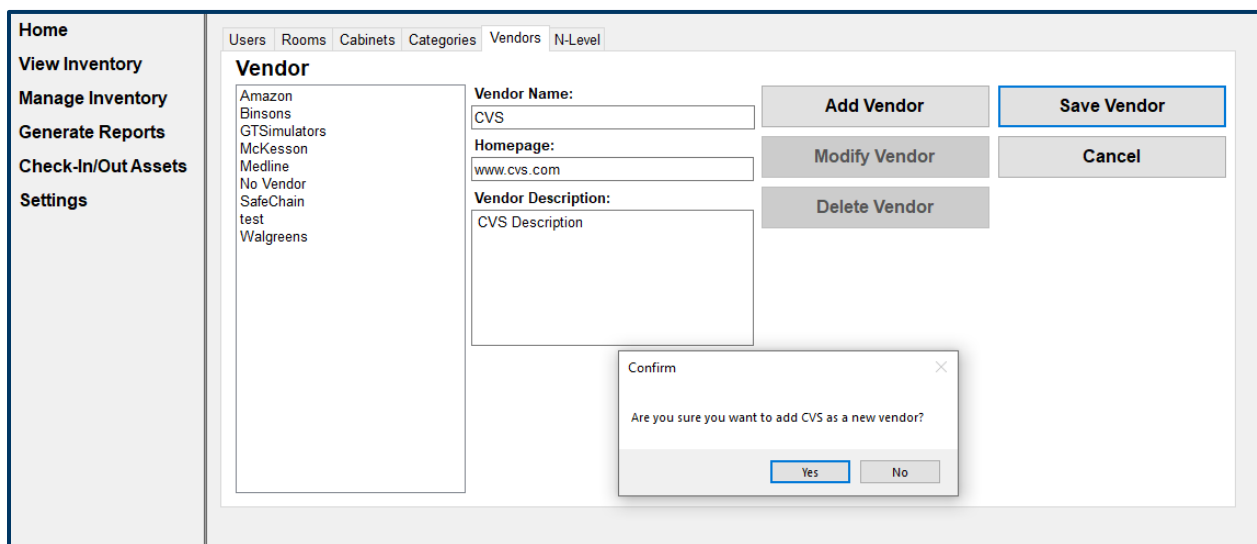


Figure 8.24

- Clicking **No** will cancel the operation.
- Clicking **Yes** will display a confirmation message that the addition was successful.

2. **Modify Vendor** – This allows for the modification of existing vendors in the system.

- Upon selecting the vendor you want to modify and clicking the **Modify Vendor** button, all fields will be unlocked and two new buttons will appear; **Save Vendor** and **Cancel**. The user can then modify the existing vendor's information.
- Upon clicking the **Save Vendor** button, the user will receive a confirmation message asking if they want to modify the vendor, as shown below in figure 8.25.

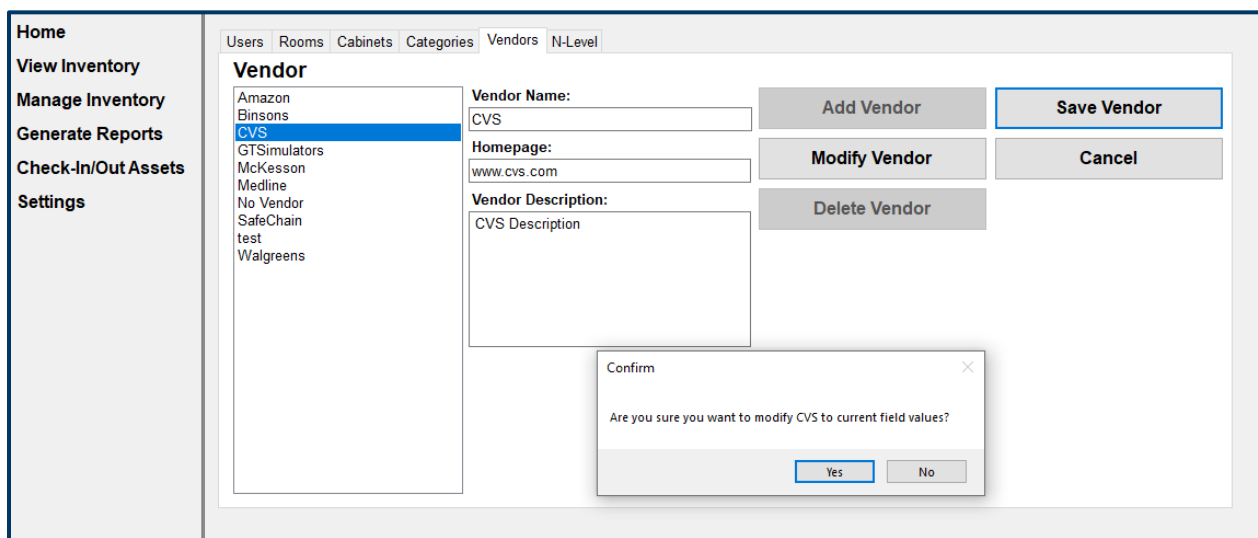


Figure 8.25

- Clicking **No** will cancel the operation.
- Clicking **Yes** will display a confirmation message that the modification was successful.

3. **Delete Vendor** – This allows for the deletion of an existing vendor in the system.

- Upon selecting the vendor you want to delete and clicking the **Delete Vendor** button, a confirmation message will appear asking if you want to delete the vendor, as shown below in figure 8.26.

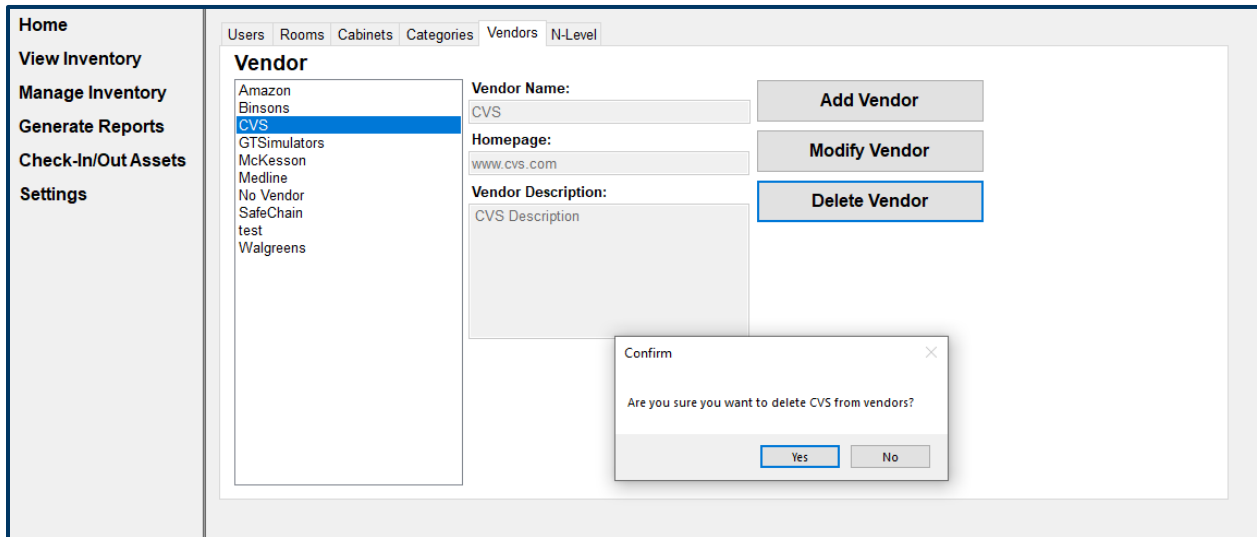


Figure 8.26

- Clicking **No** will cancel the operation.
- Clicking **Yes** will display a confirmation message that the deletion was successful.

N-Level

Settings → N-Level

The **N-Level** setting allows administrative users to manage all the N-Levels in the system.

Shown below in figure 8.27 is the initial screen users will see.

The screenshot shows a web application interface for managing N-Levels. On the left is a sidebar with a menu: Home, View Inventory, Manage Inventory, Generate Reports, Check-In/Out Assets, and Settings (highlighted in blue). The main content area has a top navigation bar with tabs: Users, Rooms, Cabinets, Categories, Vendors, and N-Level (selected). Below the tabs, the title 'N-Level' is displayed. To the left of the form is a list of N-Level identifiers: N/A, N1, N2, N3, N4, N5, and NP. The form itself has two input fields: 'N-Level Name:' and 'N-Level Description:'. To the right of these fields are three buttons: 'Add N-Level' (grey), 'Modify N-Level' (grey), and 'Delete N-Level' (blue with a white border).

Figure 8.27

Upon selecting an N-Level from the list, the following information will be displayed:

- **N-Level Name** – The name of the N-Level.
- **N-Level Description** – Additional details about the N-Level.

Three operations can be performed regarding N-Level management:

1. **Add N-Level** – Adds a new N-Level to the system

- Upon clicking the **Add N-Level** button, all fields will be unlocked and two new buttons will appear; **Save N-Level** and **Cancel**. The user will then enter the new N-Level's information.
- Upon clicking the **Save N-Level** button, the user will receive a confirmation message asking if they want to add the N-Level, as shown below in figure 8.28.

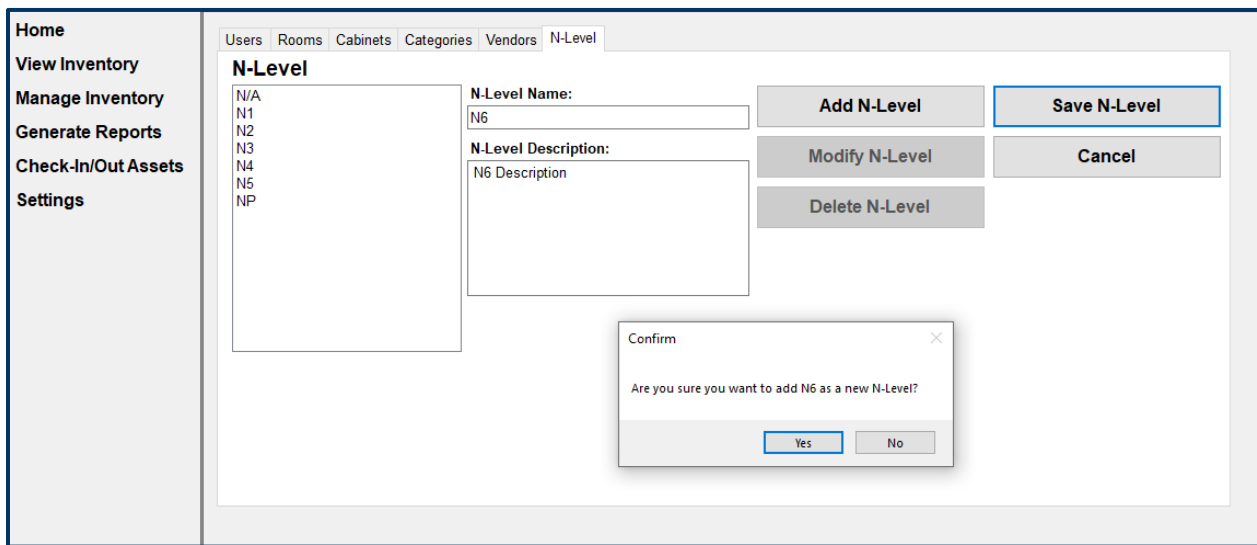


Figure 8.28

- Clicking **No** will cancel the operation.
- Clicking **Yes** will display a confirmation message that the addition was successful.

2. **Modify N-Level** – This allows for the modification of an existing N-Level in the system.

- Upon selecting the N-Level you want to modify and clicking the **Modify N-Level** button, all fields will be unlocked and two new buttons will appear; **Save N-Level** and **Cancel**. The user can then modify the existing N-Level's information.
- Upon clicking the **Save N-Level** button, the user will receive a confirmation message asking if they want to modify the N-Level, as shown below in figure 8.29.

Figure 8.29

- Clicking **No** will cancel the operation.
- Clicking **Yes** will display a confirmation message that the modification was successful.

3. **Delete N-Level** – This allows for the deletion of an existing N-Level in the system.

- Upon selecting the N-Level you want to delete and clicking the **Delete N-Level** button, a confirmation message will appear asking if you want to delete the N-Level, as shown below in figure 8.30.

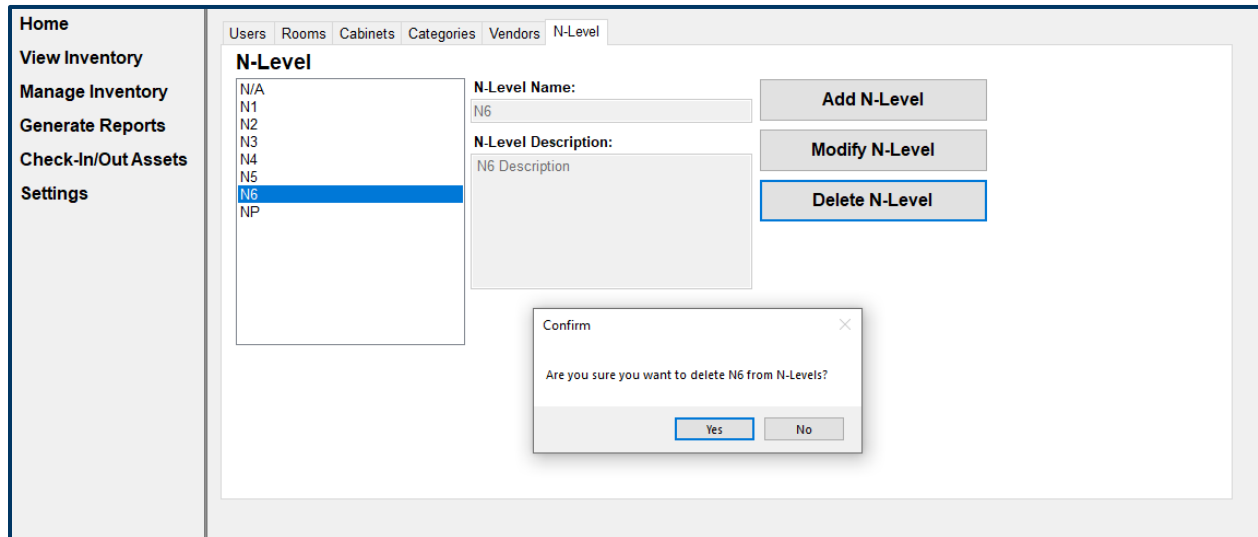


Figure 8.30

- Clicking **No** will cancel the operation.
- Clicking **Yes** will display a confirmation message that the deletion was successful.

FAQs

This page includes some frequently asked questions and where one can find the answers in the user manual.

Login FAQs

- [How do I log in?](#)
 - You must enter your SVSU email address and password, then click the **Login** button. Your user account must also exist within the user table and have admin authority to access the application.
- How do I reset my password?
 - See the SVSU Self-Service Password Reset (SSPR) page found here:
<https://appsc.svsu.edu/passwordselfservice/>

Inventory FAQs

- [How do I know how much stock is available?](#)
 - Go to **View Inventory** and find the commodity you are looking for. Click on the item once and a list of all the locations and quantities at those locations will be displayed.
- [What if I want to add stock but do not see it as an option?](#)
 - If the commodity already exists in the system, see **Add Stock for Existing Item** on page 24 for a walkthrough on how to add stock.

- If the commodity is a new item, you must first add the item to the system before you can add stock. See **Create / Modify** on page 21 for a walkthrough on creating an item.
- [How do I manage vendors?](#)
 - To manage vendors in the system, go to **Settings → Vendors**. You can then either add, modify, or delete vendors.

Reports

- [How can I get a cumulative report of what has happened in the system?](#)
 - To see a cumulative report of all activity on the system, go to **Generate Reports → Activity Log**.