EZTRAK VIMS USER MANUAL

January 19, 2024

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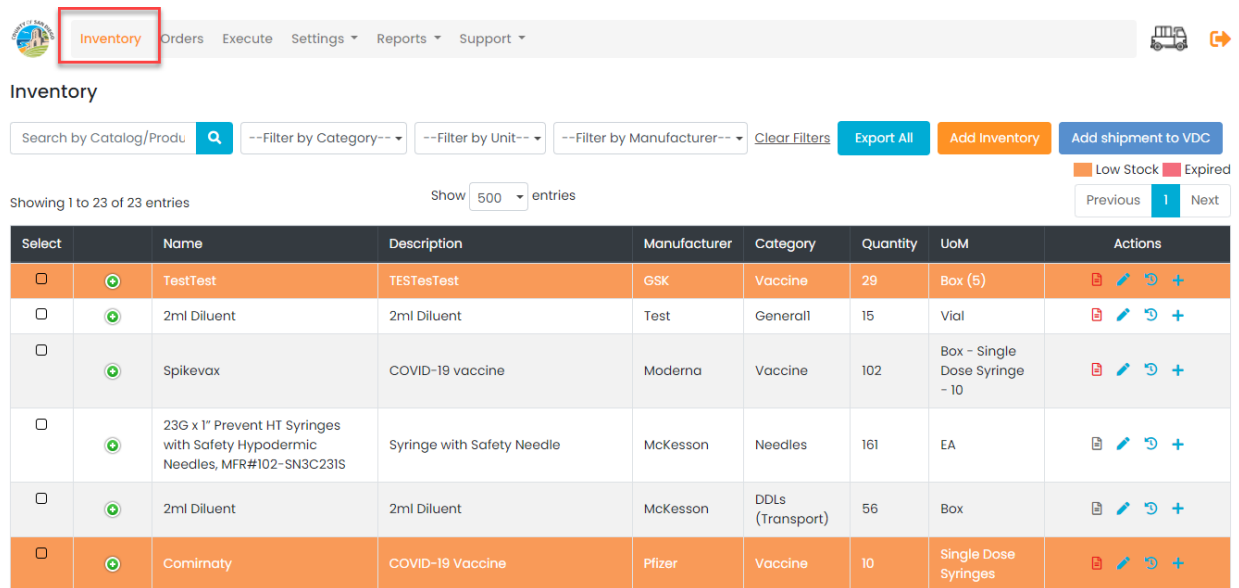
Introduction

The purpose of this document is to guide users on how to use and navigate the EZTRAK software application.

Inventory

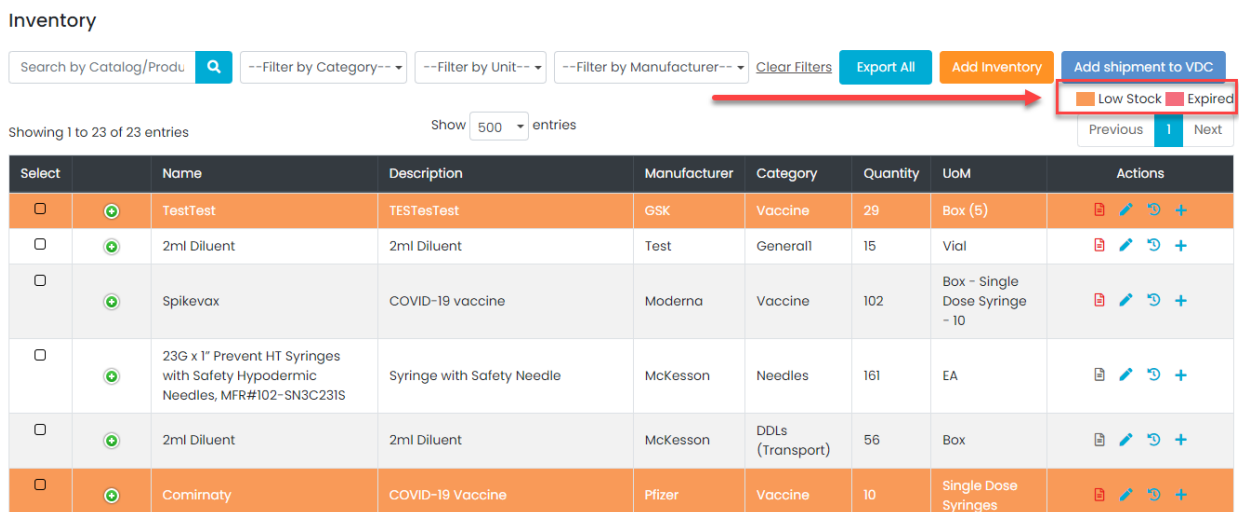The Inventory page displays a list of everything you have in stock.

It provides a quick overview, indicating which items are running low, expired, and which ones are in good condition.

At the top of the page, you'll find a search box and different filters to help you quickly find a specific item in your inventory.

You can filter by:

- Category
- Unit
- Manufacturer

You can also save your inventory list to your computer. Just click the 'Export All' button at the top.

Adding Inventory

When inputting inventory into the system, you are either adding an entirely new product or adding quantity or batches to an existing one.

To add a new product into your inventory, just click the 'Add Inventory' button found at the top.

A window will appear, prompting you to fill in the following details:

- Name
- Description
- Manufacturer (choose from the dropdown)
- Category (choose from the dropdown)
- UOM (choose from the dropdown)

After entering the required details, click on 'Add Inventory' to save your changes.

To add quantity or batches in an existing inventory, go to the product and click on the checkbox to select it. Then, click the 'Add Shipment to VDC' button at the top.

A window will appear, prompting you to fill in the following details:

- Lot #
- Source (choose from the dropdown)
- Quantity
- Manufacturer Expiration Date
- BUD (Beyond used date)
- Location (choose from the dropdown)

If you need to input more than one batch, just click the 'Add Line Item' button.

Once you've entered the necessary information, click 'Save' to keep your changes.

Editing Inventory

On the Inventory page, you can perform several actions either at the product level or at the batch level.

Product Level

On the product level, you can perform the following actions:

- Attach files to existing inventories or remove them
- Review item history
- Edit inventories

To attach files to an inventory, click the 'Attachment' icon.

A window will pop up where you can upload files and add necessary notes. Within the same window, you also have the option to remove files.

Click 'Save' after you've made the required changes.

To see a comprehensive record of all entries and actions related to a product, click on the 'Item History' icon.

If you wish to modify an item's information, simply click the 'Edit Item' icon.

A window will appear, enabling you to modify information such as Name, Manufacturer, UOM (Unit of Measure), Description, Category, and Minimum Quantity.

Once you're done with the modifications, click 'Update Inventory' to keep your changes.

Batch Level

To access the batches of an item, click on the 'plus' icon before the item name.

On the batch level, you can perform the following actions:

- Add notes
- Review item history
- Edit batch inventories
- Perform item reconciliation

To add notes pertaining to a batch, click the 'Notes' icon.

To see a comprehensive record of all entries and actions related to a batch or lot number, click on the 'Item History' icon.

If you wish to modify a batch's information, simply click the 'Edit Item' icon.

Select		Name	Description	Manufacturer	Category	Quantity	UoM	Actions
☐	⊕	TestTest	TESTesTest	GSK	Vaccine	29	Box (5)	🖹 ✏ 🕘 +
☐	⊕	2ml Diluent	2ml Diluent	Test	General1	15	Vial	🖹 ✏ 🕘 +
☐	⊖	Spikevax	COVID-19 vaccine	Moderna	Vaccine	102	Box – Single Dose Syringe – 10	🖹 ✏ 🕘 +

Lot #	Source	OH Qty	UOM	Expiration Date	End Of Use	Location	Barode	Action
a12345	Vaccines for Children (VFC)	98	Box – Single Dose Syringe – 10	01/04/2025	03/04/2024	REF-2-B-B	▥	🖹 ✏ 🕘 ⚖
XXXXX	Private-Purchased	4	Box – Single Dose Syringe – 10	01/05/2024	01/19/2024	REF-1-A-B	▥	🖹 ✏ 🕘 ⚖

A window will open, allowing you to edit specific information only such as Lot Number, End Use Date, and Expiry Date for the batch. For instructions on adjusting the inventory quantity, please refer to the next section, Item Reconciliation.

Inventory Shipment: TestTest ✕

Lot Number
999001

Location
FRZ-1-A-C

Qty *
45

Issued Qty
5

Reconciled Qty
0

Expiry Date
01/17/2024

EndUse Date
01/29/2024

Created By: info@precisionmaterial.net
Created Date: 01/09/2024 08:28 PM

Updated By: info@precisionmaterial.net
Updated Date: 01/09/2024 08:28 PM

[Reconciliation]   [Cancel] [Update Shipment]

Once you're done with the modifications, click 'Update Shipment' to keep your changes.

Item Reconciliation

In cases where there are discrepancies between the recorded number of items in the system and the actual inventory, the system provides a feature to adjust the records, ensuring accuracy.

Before adding an item reconciliation for a specific batch, you must first create a reconciliation reason. To do this, go to 'Reconciliation Reasons' under the Settings menu. Once you're in that page, click 'Add Reconciliation Reason'.

Settings / Reconciliation Reasons

Search by Reconciliation 🔍	Clear Filters

☐ Show Deleted Entries

Showing 1 to 1 of 1 entries

Show 500 ▾ entries

Previous 1 Next

Reconciliation Reasons	Actions
data entry error	✎ 🗑

Enter your reason and click 'Add' to save it.

Settings / Reconciliation Reasons / Add

Add Reconciliation Reasons

Name

data entry error

Add   Cancel

Next, go back to the Inventory page, navigate to the batch level and click on the 'Item Reconciliation' icon for the relevant batch of the item.

☐	⊖	Moderna	COVID-19 Vaccine	Moderna	Vaccine	483	Carton - 10 multi-dose vials	🗎 ✎ 🕘 ➕

Lot #	Source	OH Qty	UOM	Expiration Date	End Of Use	Location	Barode	Action
5555	Vaccines for Children (VFC)	475	Carton - 10 multi-dose vials	06/30/2026	06/30/2026	REF-2-B-B	‖‖	🗎 ✎ 🕘 ⚖
8	BAP 317	8	Carton - 10 multi-dose vials	01/11/2024	01/18/2024	REF-1-A-B	‖‖	🗎 ✎ 🕘 ⚖

A window will appear, allowing you to add the reconcile quantity (the actual quantity you have on hand), choose the reconciliation reason from the dropdown and add notes.

Inventory Reconciliation: ✕

Lot Number   OH Qty

8   10

Reconcile Qty   Reconciliation Reason *

8   data entry error   ▾

Notes

Cancel   Add Reconcile Qty

Click 'Add Reconcile Qty' to save the changes you made.

Deleting Inventory

You have the option to completely delete an inventory or a batch from the system.

To delete an inventory from the system, navigate to the inventory and click on 'Edit Item'.

Select		Name	Description	Manufacturer	Category	Quantity	UoM	Actions
☐	⊕	TestTest	TESTesTest	GSK	Vaccine	29	Box (5)	🗎 ✏ 🕘 +
☐	⊕	2ml Diluent	2ml Diluent	Test	General1	15	Vial	🗎 ✏ 🕘 +
☐	⊕	Spikevax	COVID-19 vaccine	Moderna	Vaccine	4	Box - Single Dose Syringe - 10	🗎 ✏ 🕘 +

On the next window, click on the 'Delete' button and provide the passcode as requested by the system.

You have now successfully deleted an item from the inventory.
To delete a batch of an item, click on 'Edit Item' for the relevant batch in the inventory.

On the next window, click on the 'Delete' button and provide the passcode as requested by the system.

You have now successfully deleted an item batch from the inventory.

Orders

The Orders page displays a list of all orders made in the system. It also shows the statuses of each order which can either be:

- Submitted
- Delivery Scheduled
- Delivered
- Past Due
- Canceled
- On Hold
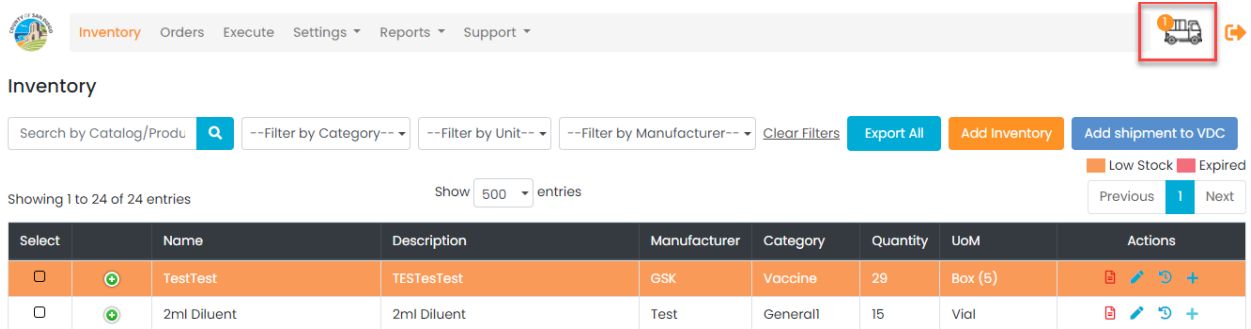
Placing An Order

Orders take place when a facility requests for inventories to be issued to them.

To place an order, go to the Inventory page and navigate to the item you want to place an order for. Click the 'plus' icon to add an order.
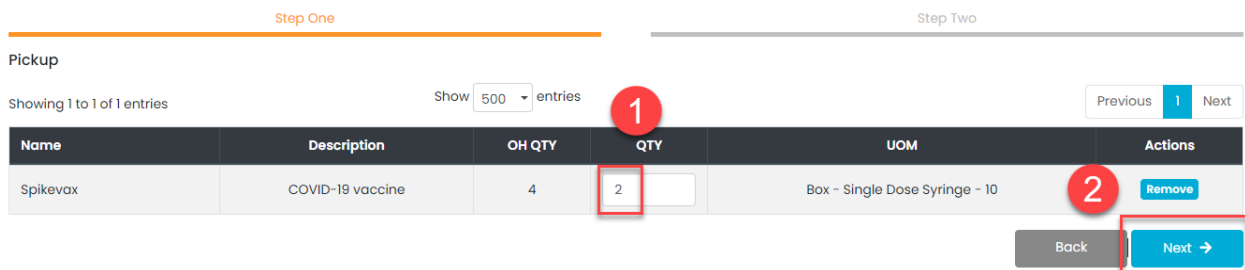
Clicking the 'plus' icon will add an order to your cart, visible at the top right corner of your screen.

Click on the cart icon to initiate the checkout process. In step one of the checkout, indicate the quantity desired for the item, and then click 'Next.

Complete the required information in step two by providing the following details:

- Type – this can either be Distribution or Delivery
    - Distribution - order is fulfilled at the warehouse
    - Delivery - order is delivered from the warehouse to the designated facility
- Date needed
- Start time
- End time
- Notes
- Facility (choose from the dropdown)
- Contact name
- Telephone
- Email
- You can choose to receive an order and delivery confirmation.

After providing the necessary information, click 'Submit' to finalize the process of placing your order.

Fulfilling An Order

To fulfill an order, go to the Orders page and click on the cart icon next to the order marked as 'submitted'.

Next, click 'Issue' to process the requested inventory.

Pickup Status : #24-00056

Status:
Need By: 01/25/2024
Start Time: 12:55
End Time: 12:56
Type: Distribution
Order Placed By: Jason John (jasonjohn@precisionmaterial.net)
Contact Information: 619-555-5555
Destination: ABC Clinic
Destination Address: 1501 Imperial Ave. San Diego, CA 92120

Order Submitted: 01/19/2024
Warehouse Received:
POC Name: Mickey Mouse
POC Contact: 619-555-5555
Order Delivered:

Order Note:

Delivery Note:

Name	Product Id	Manufacturer	UOM	QTY	ISSUED QTY	Category	Location	Lot #	Sources	Action
Spikevax	0002	Moderna	Box - Single Dose Syringe - 10	2	0	Vaccine				Issue

Showing 1 to 1 of 1 entries   Previous 1 Next

A window will appear, prompting you to specify the quantity requested. After providing the number of quantities, click 'Save'.

Pickup Status : #2   Issuing Material

Spikevax   Order Qty: 2   Expired

Available Quantities:

Source	Lot #	Location	Avail	QTY	
Private-Purchased	XXXXX	REF-1-A-B	4	2	

Save

Name	Product Id	Manufacturer	UOM	QTY	ISSUED QTY	Category	Location	Lot #	Sources	Action
Spikevax	0002	Moderna	Box - Single Dose Syringe - 10	2	0	Vaccine				Issue

Showing 1 to 1 of 1 entries   Previous 1 Next

Created By: jasonjohn@precisionmaterial.net   Updated By: jasonjohn@precisionmaterial.net

You will then see that the status has changed from 'Submitted' to 'Delivery Scheduled'.

Pickup Status : #24-00056

Edit **Print** ✕

Status:	● Delivery Scheduled	Order Submitted:	01/19/2024
Need By:	01/25/2024	Warehouse Received:	01/19/2024 09:02 PM
Start Time:	12:55	POC Name:	Mickey Mouse
End Time:	12:56	POC Contact:	619-555-5555
Type:	Distribution	Order Delivered:	
Order Placed By:	Jason John (jasonjohn@precisionmaterial.net)		
Contact Information:	619-555-5555		
Destination:	ABC Clinic		
Destination Address:	1501 Imperial Ave. San Diego, CA 92120		

Order Note:

Delivery Note:

Name	Product Id	Manufacturer	UOM	QTY	ISSUED QTY	Category	Location	Lot #	Sources	Action
Spikevax	0002	Moderna	Box - Single Dose Syringe - 10	2	2	Vaccine	REF-1-A-B	XXXXX	Private-Purchased	

Showing 1 to 1 of 1 entries

Previous **1** Next

Created By: jasonjohn@precisionmaterial.net

Created Date: 01/19/2024 08:57 PM

Updated By: jasonjohn@precisionmaterial.net

Updated Date: 01/19/2024 09:02 PM

Delete   **Complete Delivery**

If you need to make changes to the order, click the 'Edit' button. Otherwise, you can close the window by clicking the 'X' icon.

Pickup Status : #24-00056

Edit **Print** ✕

Status:	● Delivery Scheduled	Order Submitted:	01/19/2024
Need By:	01/25/2024	Warehouse Received:	01/19/2024 09:02 PM
Start Time:	12:55	POC Name:	Mickey Mouse
End Time:	12:56	POC Contact:	619-555-5555
Type:	Distribution	Order Delivered:	
Order Placed By:	Jason John (jasonjohn@precisionmaterial.net)		
Contact Information:	619-555-5555		
Destination:	ABC Clinic		
Destination Address:	1501 Imperial Ave. San Diego, CA 92120		

Order Note:

Delivery Note:

Name	Product Id	Manufacturer	UOM	QTY	ISSUED QTY	Category	Location	Lot #	Sources	Action
Spikevax	0002	Moderna	Box - Single Dose Syringe - 10	2	2	Vaccine	REF-1-A-B	XXXXX	Private-Purchased	

Showing 1 to 1 of 1 entries

Previous **1** Next

Created By: jasonjohn@precisionmaterial.net

Created Date: 01/19/2024 08:57 PM

Updated By: jasonjohn@precisionmaterial.net

Updated Date: 01/19/2024 09:02 PM

Delete   **Complete Delivery**

Completing An Order

After an order has been delivered, you can update its status by going back to the order and clicking on the cart icon.

In the window that appears, click the 'Complete Delivery' button.

A new window will appear, asking you to enter the courier name, the recipient's name, and the option to attach files and add notes.

Once you click 'Save', the order status will change from 'Delivery Scheduled' to 'Delivered'.

Execute

The Execute page offers actions you can take regarding inventory management.
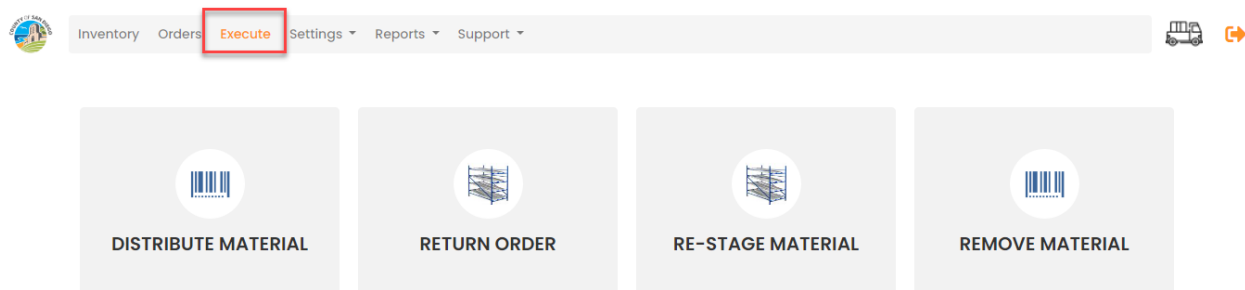
Distribute Material

The Distribute Material feature allows you to reduce inventory without creating an order.

On the Execute page, click on 'Distribute Material' and follow these steps:

Step 1: Enter the scan catalog or lot number.

Step 1

Scan Catalog/Lot #

999001

Back   Next

Step 2: Select the item you want to move and specify the issue quantity.

Step 2

Select	Item	Lot #	Source	Location	OH QTY	Issue QTY
☑	TestTest	999001	BAP 317	FRZ-1-A-C	15	2
☐	2ml Diluent	999001	BAP 317	Refrigerator 1-Door A-Shelf 1	56	
☐	TestTest	999001	BAP 317	Refrigerator 1-Door A-Shelf 1	14	

Back   Save

Click 'Save' to successfully complete the material distribution.

Return Order

The Return Order feature allows you to return inventory that was previously ordered.

On the Execute page, click on 'Return Order' and follow these steps:

Step 1: Enter the scan catalog or lot number.

Step 1

Scan Catalog/Lot #

XXXXX

Back   Next

Step 2: Select the item you want to return, specify the return quantity and add some

notes.

Click 'Save' to successfully complete the return order.

Re-stage Material

The Re-stage Material feature allows for inventory to be relocated.

On the Execute page, click on 'Re-stage Material' and follow these steps:

Step 1: Enter the user pin.

Step 2: Provide the scan catalog or lot number of the inventory you want to relocate.

Step 3: Select the item you want to relocate, pick a new location from the dropdown and specify the quantity number.

Click 'Save' to successfully relocate the inventory.

Remove Material

The Remove Material feature enables you to remove an item entirely from the overall inventory. This is used when you want to exclude an item from on-hand inventory, essentially archiving it without deletion.

On the Execute page, click on 'Remove Material' and follow these steps:

Step 1: Enter the scan catalog or lot.

Step 2: Select the item for return, indicate the removed quantity, select a justification from the dropdown, provide a description, and upload a file if necessary.

Click 'Save' to successfully remove the inventory.

Settings

The settings feature is only available to administrators. Under the settings menu, there are a number of things you can do which includes setting up users, adding BIN locations, adding manufacturers and more.

Accounts

The accounts page is where you can add and delete users, specify their access level, and reset passwords.

To add a user, just click on the 'Add User' button.

In the following window, complete the required information.

Regarding the Account Type, clicking the 'information' icon next to each option opens a window explaining the function of each role.
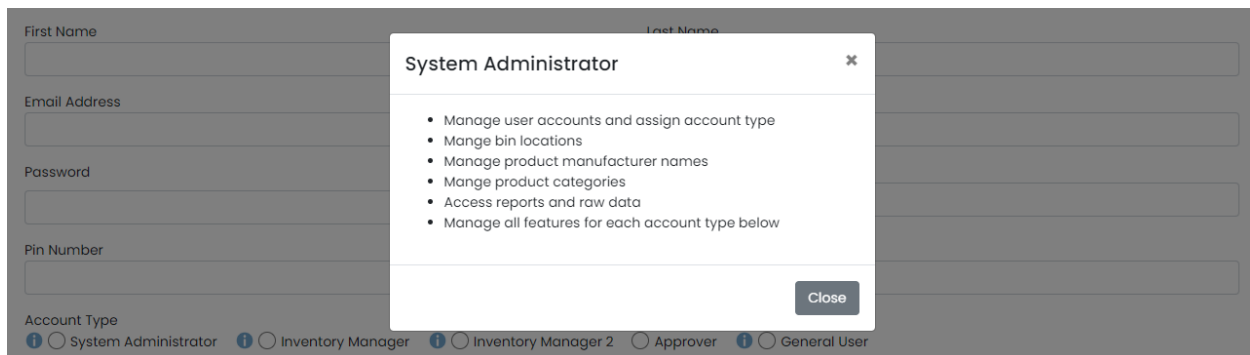
After completing the required information, click 'Add' to create the user.

The Accounts page provides quick actions for you to use.

1. Edit icon – enables you to modify certain details of a user
2. Key icon – enables you to change a user's password
3. Trash icon – enables you to remove a user from the system

BIN Location

The BIN Location page is where you can add, delete or modify BIN locations.

To add a BIN location, just click on the 'Add New' button.

Settings / Bin Location

Select	Unit	Door	Shelf	Actions
☐	FRZ-1	A	C	
☐	R6	Door A	Shelf 2	
☐	REF-1	A	B	
☐	REF-2	B	B	
☐	Refrigerator 1	Door A	Shelf 1	
☐	Refrigerator 1	A	1	

In the following window, complete the required information.

Location / Index / Add

Add Location

Unit *

Door

Shelve

After completing the required information, click 'Add' to create the BIN location.

The BIN Location page provides quick actions for you to use.

1. Edit icon – enables you to modify certain details of a BIN location
2. Trash icon – enables you to remove a BIN location
3. History icon – displays a comprehensive record of all entries and actions related to a BIN location

Manufacturer

The Manufacturer page is where you can add, delete or modify manufacturers.

To add a manufacturer, just click on the 'Add Manufacturer' button.

In the following window, enter the name of the manufacturer.

Click 'Add' to create the manufacturer.

The Manufacturer page provides quick actions for you to use.

1. Edit icon – enables you to modify the name of the manufacturer
2. Trash icon – enables you to remove a manufacturer

Categories

The Categories page is where you can add, delete or modify categories.

To add a category, just click on the 'Add New' button.

In the following window, enter the category name.

Click 'Add' to create the category.

The Category page provides quick actions for you to use.

1. Edit icon – enables you to modify the category name

2. Trash icon – enables you to remove a category

Settings / Categories

Select	Name	Actions
☐	DDLs (Transport)	✎ 🗑
☐	Diluent	✎ 🗑
☐	General1	✎ 🗑
☐	InTemp Data Loggers	✎ 🗑
☐	Needles	✎ 🗑
☐	Vaccine	✎ 🗑

Showing 1 to 6 of 6 entries   Show 500 entries   Previous 1 Next

UOM

The UOM page is where you can add, delete or modify units of measurement.

To add a UOM, just click on the 'Add UOM' button.

Settings / UOM

Select	UOM	Actions
☐	Box	✎ 🗑
☐	Box	✎ 🗑
☐	Box – Single Dose Syringe – 10	✎ 🗑
☐	Box (5)	✎ 🗑
☐	Carton – 10 multi-dose vials	✎ 🗑
☐	Case	✎ 🗑

Showing 1 to 10 of 10 entries   Show 500 entries   Previous 1 Next

In the following window, enter the UOM name.

SetUp / UOMs / Add

Add UOM

Name

[   ]

[Add] [Cancel]

Click 'Add' to create the UOM.

The UOM page provides quick actions for you to use.

1. Edit icon – enables you to modify the UOM name
2. Trash icon – enables you to remove a UOM

Facility

The Facilities page is where you can add, delete or modify facilities.

To add a facility, just click on the 'Add New' button.

In the following window, complete the required information.

Click 'Add' to create the facility.

The Facility page provides quick actions for you to use.

1. Edit icon – enables you to modify details of a facility
2. Trash icon – enables you to remove a facility
3. History icon - displays a detailed record of all changes made in connection with a facility.

Settings / Facilities

Select	Facility Name	Facility Address	Contact Name	Contact Telephone	Contact Email	Actions
☐	ABC Clinic	1501 Imperial Ave. San Diego, CA 92120	Mickey Mouse	619-555-5555	Mickey@aol.com	
☐	N Central PHC	1100 Orange Street	Anna Test Case	555-555-5555	anna@testcase.com	
☐	South Street	17901 Pioneer Blvd # L, Cerritos, CA 90701	Jason Johnson	626-327-6348	jason@precisionmaterial.net	
☐	Super Clinic	1234 Ocean View St. SD 92111	April	619-867-5309	april@yahoo.com	

Justification

The Justification page allows you to add, delete, or modify justifications used to support the action of removing an item from the overall inventory.

To add a justification, just click on the 'Add Justification' button.

Settings / Justifications

Justification	Actions
Lost	
Miscounted	
Returned	
Stolen	
Unknown	

In the following window, add the justification.

Settings / Justifications / Add

Add Justification

Name

[   ]

[Add] [Cancel]

Click 'Add' to create the justification.

The Justification page provides quick actions for you to use.

1. Edit icon – enables you to modify a justification
2. Trash icon – enables you to remove a justification

Settings / Justifications

[Search by Justification] [🔍] [Clear Filters]   [Add Justification]

☐ Show Deleted Entries

Showing 1 to 5 of 5 entries   Show [500 ▾] entries   [Previous] [1] [Next]

Justification	Actions
Lost	✏ 🗑
Miscounted	✏ 🗑
Returned	✏ 🗑
Stolen	✏ 🗑
Unknown	✏ 🗑

Reconciliation Reasons

The Reconciliation Reasons page allows you to add, delete, or modify reconciliation reasons used in inventory reconciliation.

To add a reconciliation reason, just click on the 'Add Reconciliation Reason' button.

Settings / Reconciliation Reasons

[Search by Reconciliation] [🔍] [Clear Filters]   [Add Reconciliation Reason]

☐ Show Deleted Entries

Showing 1 to 1 of 1 entries   Show [500 ▾] entries   [Previous] [1] [Next]

Reconciliation Reasons	Actions
data entry error	✏ 🗑

In the following window, add the reconciliation reason.

Settings / Reconciliation Reasons / Add

Add Reconciliation Reasons

Name

[   ]

[Add] [Cancel]

Click 'Add' to create the reconciliation reason.

The Reconciliation Reasons page provides quick actions for you to use.

1. Edit icon – enables you to modify a reconciliation reason
2. Trash icon – enables you to remove a reconciliation reason

Settings / Reconciliation Reasons

[Search by Reconciliation] [🔍] [Clear Filters]   [Add Reconciliation Reason]

☐ Show Deleted Entries

Showing 1 to 1 of 1 entries   Show [500 ▾] entries   [Previous] [1] [Next]

Reconciliation Reasons	Actions
data entry error	✏️ 🗑️

Funding Source

The Funding Source page allows you to add, delete, or modify funding sources.

To add a funding source, just click on the 'Add Funding Source' button.

Settings / Funding Sources

[Search by Funding Sourc] [🔍] [Clear Filters]   [Add Funding Source]

Showing 1 to 6 of 6 entries   Show [500 ▾] entries   [Previous] [1] [Next]

Source	Actions
317 (Outbreak)	✏️ 🗑️
BAP 317	✏️ 🗑️
Private-Purchased	✏️ 🗑️
Test One	✏️ 🗑️
Vaccines for Children (VFC)	✏️ 🗑️
VFA	✏️ 🗑️

In the following window, add the funding source name.

Click 'Add' to create the funding source.

The Funding Source page provides quick actions for you to use.

1. Edit icon – enables you to modify a funding source
2. Trash icon – enables you to remove a funding source

Reports

EZTRAK includes a reporting feature with various types of reports accessible to users.

These report types include:

- Charts
- Statistics
- Raw Data
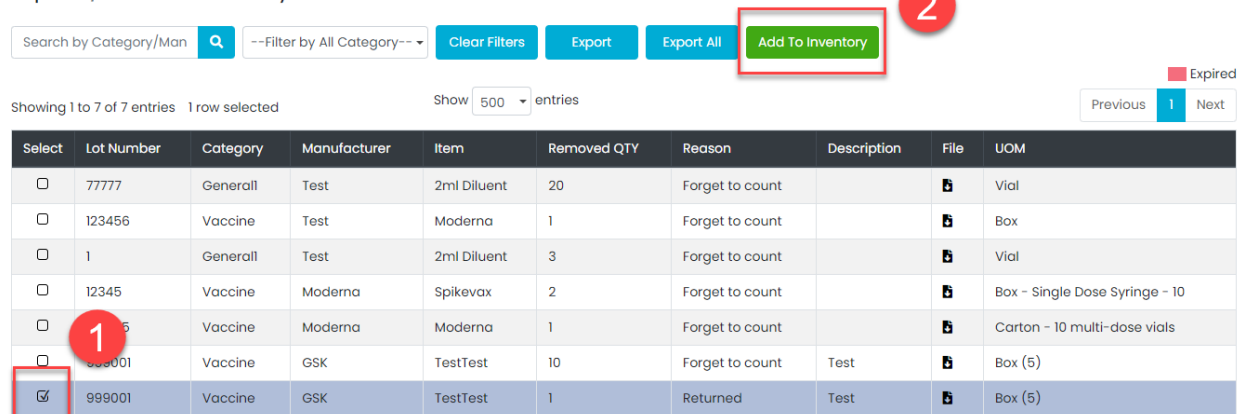- Expiration Dates
- End of Use
- Removed Inventory

All reports are fully downloadable, except for the Charts report.

Adding A Removed Item Back To Inventory

On the Removed Inventory page, you have the option to add a removed item back to the inventory.

To do this, select an item you wish to add back and click the 'Add To Inventory' button.

Support

If you encounter any issues with EZTRAK, please contact support by creating a ticket under the Support menu.