

Dashboard Screen

Quick Access Toolbar – Close the console

Minimise to Tray – Minimises the Software to the system tray (Blue “V”)

Pre-book Visitor – Allows you to book in expected visitors

Lock Inventory – Locks the Touchscreen unit. (Doesn’t disable the barcode scanner)

Ribbon – Allows you to navigate through the software using the tabs.

Setup – Allows you to change the password to access the software, edit users and change the PIN number used to access InVentry. You can also change the Email addresses for staff (Only if not using SIMS/Integris Link).

Common Tasks

Pre-Book Visitor – More in the “Pre-Book & Events” section.
Order Consumables – Click this button to order new rolls for your badge printer from InVentry.
Restart Badge Printer – Click this after replacing the label roll in the badge printer to reset it.

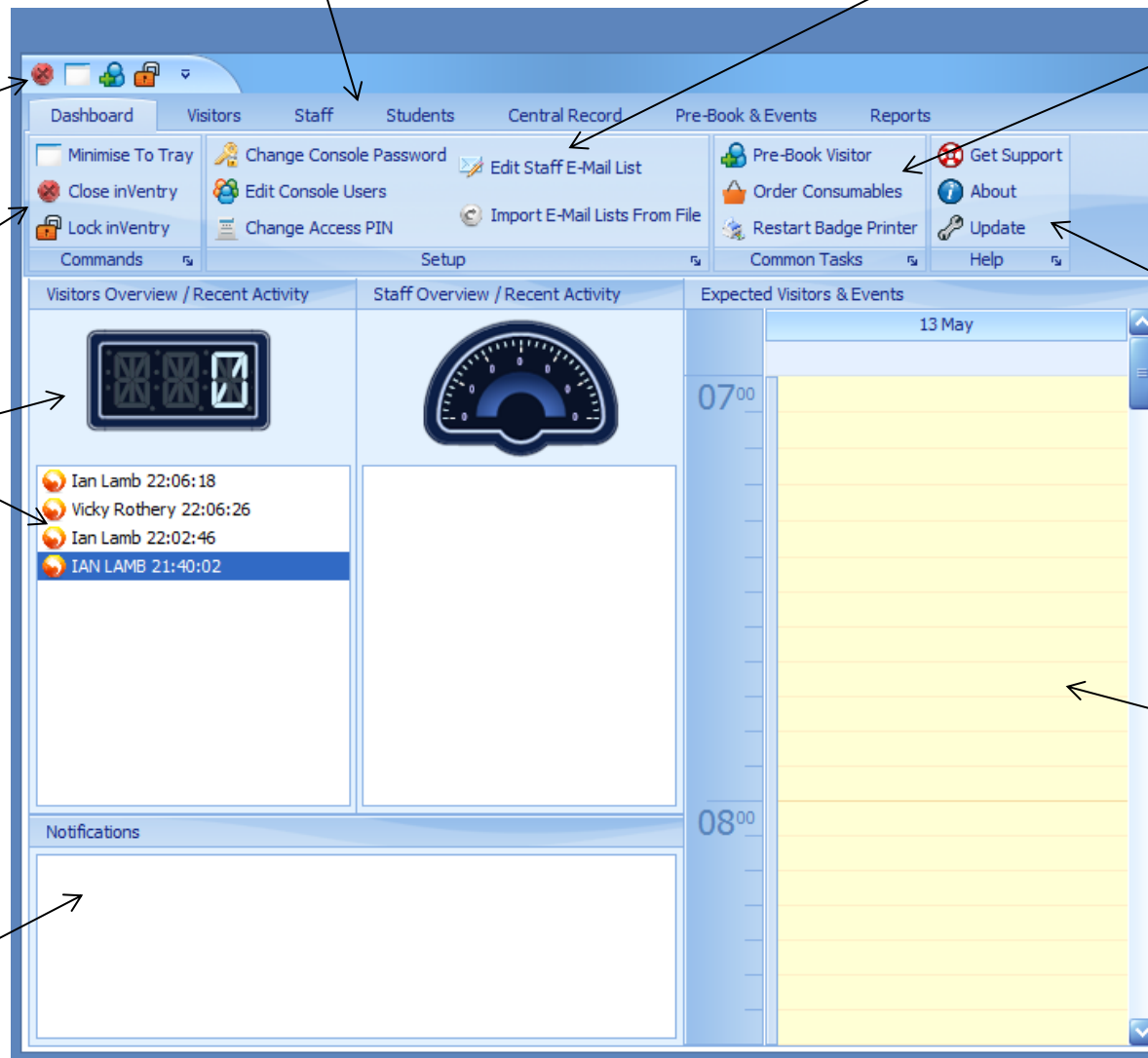
Help

Get Support - allows you to access the InVentry helpdesk and solve problems with the printer and camera.
About – See software versions
Update – Allows you to update the software, only use this if requested by the helpdesk.

Dashboard

Shows the number of visitors and staff who are signed in, with recent activity below. Green arrow- signed in. Orange Arrow – Signed out.

The notifications area has information on software updates available, and will tell you when the software has updated from SIMS/Integris (if applicable).



Expected Visitors /Events

Shows any visitors who are booked in to arrive today. Scheduled events will also appear here.

Visitors Screen

Quick Commands – Show All Signed in Visitors -Shows all visitors currently signed in.
Show all visitors – Shows all visitors that have ever signed in (May take some time)

Search – The search term you enter will search all fields including, Name, Company, Reg Number, and who they are visiting.
You can search only the currently signed in visitors or all visitors

Reports – Generate Report From Current Search – You can create reports on any information you have searched for.

Basic Search - Allows you to search today's visitors
Advanced Search – Allows you to search for visitors on a specific day, as well as specific field (eg Car Reg)

Results – Shows the results of the current search. You can re-order the results by clicking the headings. Click on a specific result to view information in the "Visitor Details" area

Visitor Details – Shows information on the currently selected visitor. To export the Photo, Right click on it and click "Export Photo"
Commands
Create User Record – Allows you to create a record in your central record for this visitor, for regular visitors.
Delete Entry – Not recommended, you can delete that visitor's entry from the database, this is not recoverable.

The screenshot shows the INVENTORY Visitors Screen. At the top, there are tabs for Dashboard, Visitors, Staff, Students, Central Record, Pre-Book & Events, and Reports. Below the tabs, there are buttons for 'Show All Signed In Visitors', 'Show All Visitors', 'Generate Report From Current Search', 'Quick Commands', and 'Reports'. A search bar is located below these buttons, with a 'Search' button next to it. Below the search bar, there are radio buttons for 'Basic Search' (selected) and 'Advanced Search'. Under 'Basic Search', there are two options: 'Only Search Currently Signed In Visitors' and 'Search All Visitors' (selected). Below the search options, there is a table of search results. The table has columns for Name, Company, Visiting, Reg, Signed In, and Date In. The first row is highlighted in blue. Below the table, there is a 'Visitor Details' section. It displays the following information: Name: IAN LAMB, Company: INVENTORY, Visiting: IAN, Reg: none, Date/Time In: 13/05/2013 - 21:39:47, Date/Time Out: 13/05/2013 - 21:40:02. To the right of the details is a silhouette of a person. Below the silhouette, there is a 'Commands' section with two buttons: 'Create User Record' and 'Delete Entry'.

Name	Company	Visiting	Reg	Signed In	Date In
IAN LAMB	INVENTORY	IAN	none	NO	13/05/2013 - 21:39:47
Ian Lamb	Inventry	Contractor	EX53YJL	NO	13/05/2013 - 22:02:36
Vicky Rothery	NHS	Contractor	Clio	NO	13/05/2013 - 22:05:55
Ian Lamb	Inventry	Contractor	EX53YJL	NO	13/05/2013 - 22:06:11
IAN LAMB	INVENTORY	IAN	none	NO	14/05/2013 - 20:22:26
Ian Lamb	Inventry	Contractor	EX53YJL	NO	14/05/2013 - 20:23:56
VICKY ROTHERY	NHS	IAN LAMB	EX53YJL	NO	14/05/2013 - 20:25:11

Visitor Details

Name: IAN LAMB
Company: INVENTORY
Visiting: IAN
Reg: none
Date/Time In: 13/05/2013 - 21:39:47
Date/Time Out: 13/05/2013 - 21:40:02

Commands

Create User Record
Delete Entry

Staff Screen

Commands

Show All Signed In Staff – Shows all Staff who are signed in
Sign Staff In/Out – Allows you to sign staff in and out if they has forgotten their ID badge, or if they forget to sign in.

Reports – Generate Report From Current Search – Allows you to generate reports from the information in the results box.

Search Staff Records – Select a staff member from the list to see their information, you can search by name or date.

Search Results – This shows the selected staff member's activity. Click on a record to see all information on the staff member, including photos (if enabled)

[illegible]

Student Screen

Edit Students – Only used when not using SIMS/Integris link
 Add New Student – Allows you to add a student to Inventory.
 Edit Student Details – Allows you to edit Students in Inventory.
 Delete Students – Allows you to delete Students from Inventory.

SIMS Link

Configure SIMS Options – Allows you to configure the way that Inventory Writes Marks into SIMS.
 Update Students From SIMS – Will force Inventory to update all students from SIMS, this will run automatically through the night.

Student Tools

Import Students from File – Only used if not using SIM/Integris Link. Manually add Students from a CSV File.

Manually Sign Students In/Out – Allows you to sign students in/out without them physically being in front of the Inventory unit.

The screenshot shows the 'Student Tools' menu with options: Import Students From File, Generate Sixth Form ID & Report, Add New Student, Configure SIMS Options, Manually Sign Student In/Out, Generate New Sixth Form ID & Report, Edit Student Details, Update Students From SIMS, Sixth Form ID Badge Order, Delete Student, and Edit Students. Below this is the 'Student Overview' section with tabs for Student Overview, Student Search, and SIMS Link. It includes radio buttons for 'Show All Students', 'Only Show Sixth Form', and 'Do Not Show Sixth Form', a 'Refresh' button, and two tables for 'Students Currently Signed In' and 'Students Currently Signed Out'. Each table has columns for First Name, Last Name, and Form. A 'Generate Report' button is at the bottom of each table.

Refresh – Click to show all students who are signed in or out.

Generate Report – You can use these buttons to generate reports on any of the searches you have performed.

The screenshot shows the 'Student Search' section with a 'Select Year' dropdown set to 'Year 7', a search input field, and a 'Search' button. To the right is a 'Search Results' table with columns: Event, Reason, Date, and Time. A 'Generate Report' button is at the top right. Below the search results is a table with columns: First Name, Last Name, and Class.

Generate Report – You can use these buttons to generate reports on any of the searches you have performed.

Student Search – You can search for students and see all their sign in/sign out events with reasons. Select the student's year and search for their first name, last name or class.

The screenshot shows the 'SIMS Link' section with a date dropdown set to '19/05/2013', a 'Select A Date Then Press' button, and a 'Refresh' button. Below is a table with columns: Student Name, Period, Form, Minute, Time Signed In, Status, Comments, Mark, and Select. A 'Write Marks Back To SIMS' button is at the bottom.

SIMS Link – Select a date and click on Refresh. This shows all the students who have signed in late which are ready to be written to SIMS. Select the marks you wish to write to SIMS, click on "Write Marks Back To SIMS". The fields that can be changed will appear in a shaded box.

Central Record Screen

Tools

Import Records from File – Allows you Import you existing central record from a CSV file. (Not used with SIM/Integris link)

Bulk ID Badge Order – Allows you to order ID badges for all the staff/visitors in the Central Record.

Configure Custom Fields – allows you to add new fields to the central record.

CRB Expiry Management – Allows you to specify the length of time before the CRB expires and needs to be renewed.

SIMS Link

Update All Staff From SIMS – Will update all staff currently in SIMS and add them to Inventory. This will overwrite any information in Inventory

Update New Staff From SIMS – This will Import only the new staff from SIMS into Inventory.

Update Future Staff – This will update Inventory with any staff who have a future start date in SIMS.

Commands

Add Record – Manually add records to the Central Record.

Show All Records – Shows all Staff/Contractors in the Central Record.

Set Bulk Photo – This will take a photo in first sign in of every visitor and store it in the database.

First Name	Last Name	Visitor Type	Company
Ian	Lamb	Contractor	Inventory
Ian	Lamb	Staff	Inventory
Phil	Brooke	Staff	Inventory
Vicky	Rothery	Contractor	NHS

Record Details

Name: Ian Lamb
 DOB: 15 October 1984
 Gender: Male
 Vis Type: Contractor

CRB Num: 12345678910
 CRB Issued: 11 May 2013
 Reg: EX53YJL
 Company: Inventory

ID: S0002

Buttons: Edit Record, Delete Record, Order Staff Badge, Add/Change Photo, Refresh User, Additional User Codes

Records

Click on a record to view all information held by Inventory about that person. You can re-order the list by clicking on the headings at the top.

Record Details

Edit Record – Allows you to edit/update any part of a record.

Delete Record – use with caution, this will delete all information about this person.

Order Staff Badge – Allows you to order a badge from Inventory for this person.

Add/Change Photo – allows you to change the photo for a particular person.

Refresh user – when you have made a change, you will need to refresh it for it to show in the search results.

Additional User Codes – This is only used if you are not having your badges printed by Inventory.

Pre Book & Events Screen

Pre-Book Visitor – Allows you to book a visitor in, making their sign-in quicker, all information provided will be filled in automatically when the visitor signs in.

Pre-Book Visitor

Commands

Pre-Booked Visitors Events Groups After School Clubs

☒ Show All Pre-Booked Visitors ☐ Only Show Visitors Attending An Event ☐ Only Show Visitors Not Attending An Event

First Name	Surname	Visiting	Event	Date & Time Of Arrival	Status
Bob	Smith	Ian Lamb		19/05/2013 - 23:00:00	Not Yet Arrived

Expected Visitors – Shows all visitors who have been booked in along with the information about them which have been entered.

More Information on any aspect of the Inventory system is available on the Inventory helpdesk.

<http://inventory.zendesk.com> (Your account details have been emailed to you)

You can always call the helpdesk for any information/help on any part of the Inventory system:

08433 306 134 (Option 3)

Dashboard Visitors Staff Students Central Record Pre-Book & Events Reports

Pre-Book Visitor

Commands

Pre-Booked Visitors Events Groups After School Clubs

Coming Events

Event Name	Template	Date	Time	Recurring
Parent's Evening	ParentsEvening	23 May 2013	09:00:00	One Off

Create New Event
Add Attendee
Make Event Recurring
Add A Group

Attendees

First Name	Surname	Group
Phil	Brooke	

Event Templates

ParentsEvening

New Event Template

Attendees

Shows information on who is booked in for the selected event.

Events

1. New Event Template – In this case Parents Evening (cannot contain Spaces)
2. Create New Event – setup the name, date and time as well as which template to use.
3. Add Attendee – Adds people to an event, use this to specify who is attending the event.
4. Add a Group – Add a pre assigned group of people to the event.