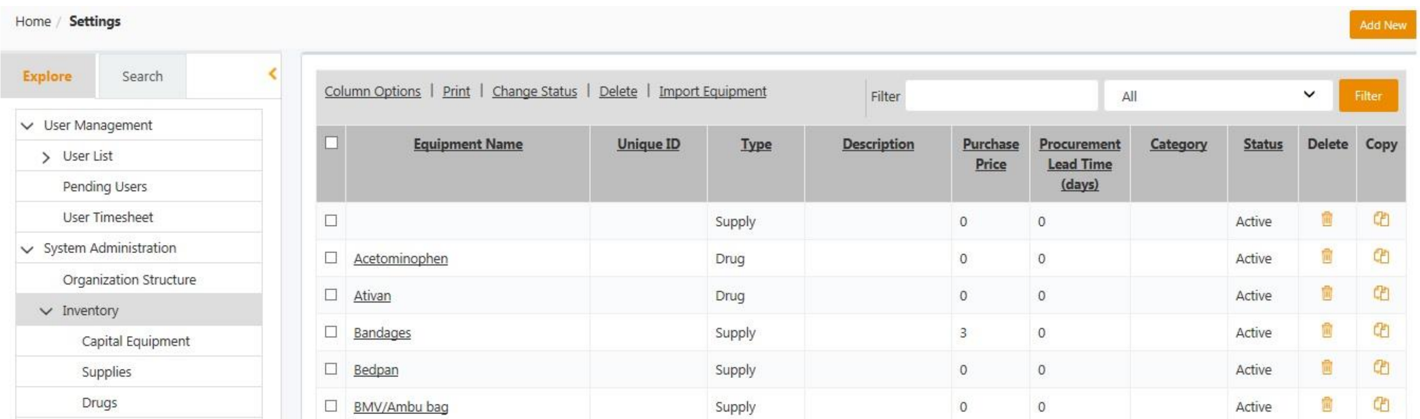
Adding Inventory

The Inventory setting enables you to manage capital equipment, supplies and drugs in your simulation center.

When inventory is added to a scheduled session in Session Calendar > Simulation Session, the status will be updated automatically. Supplies and Drugs marked as disposable will be deducted from the available inventory. Capital Equipment will be marked as unavailable if being requested for a session at the same time. The Availability will be reflected in Session Calendar > Availability > Inventory.

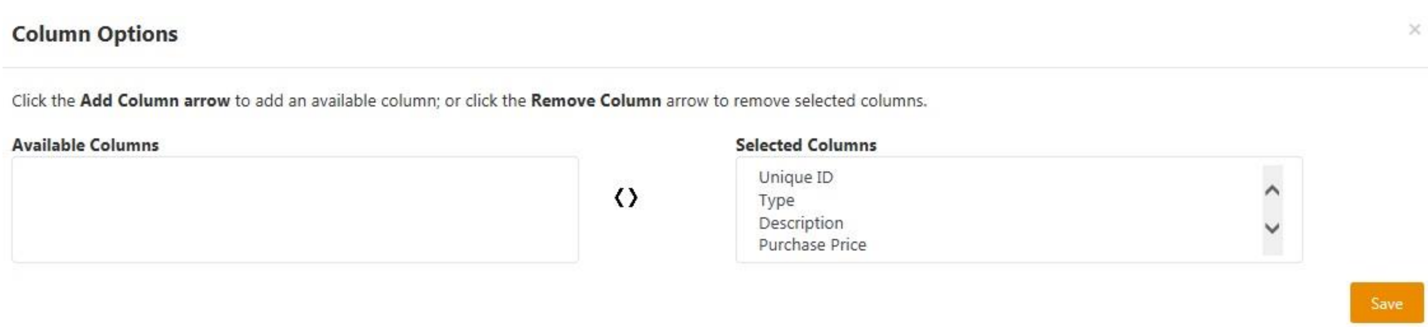
To view inventory, click **Settings > Inventory**:



Grid Options

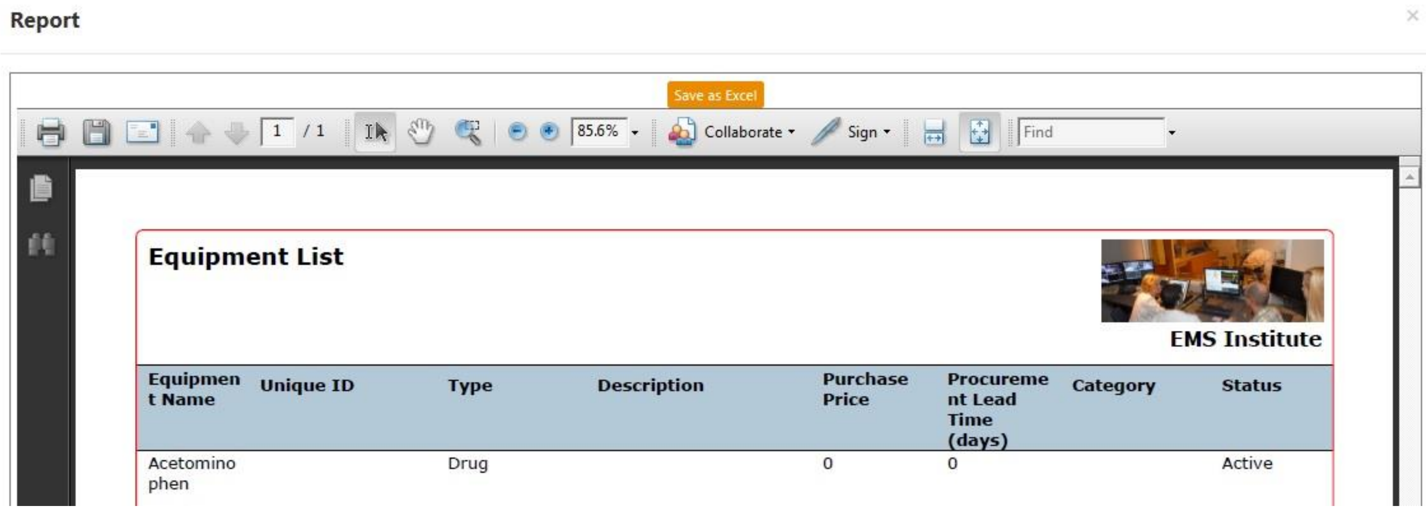
Click any column heading to sort in ascending or descending order.

Column Options



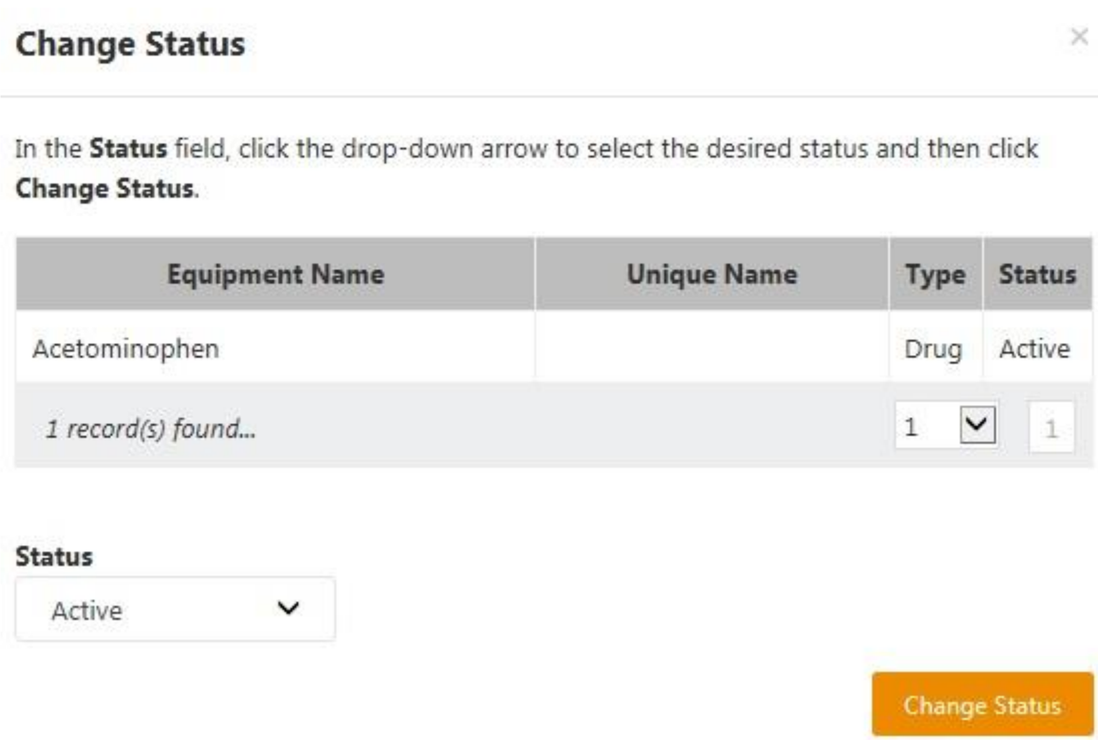
Click the **Column Options** link and then click the arrows to add or remove columns from the grid view.

Print Options



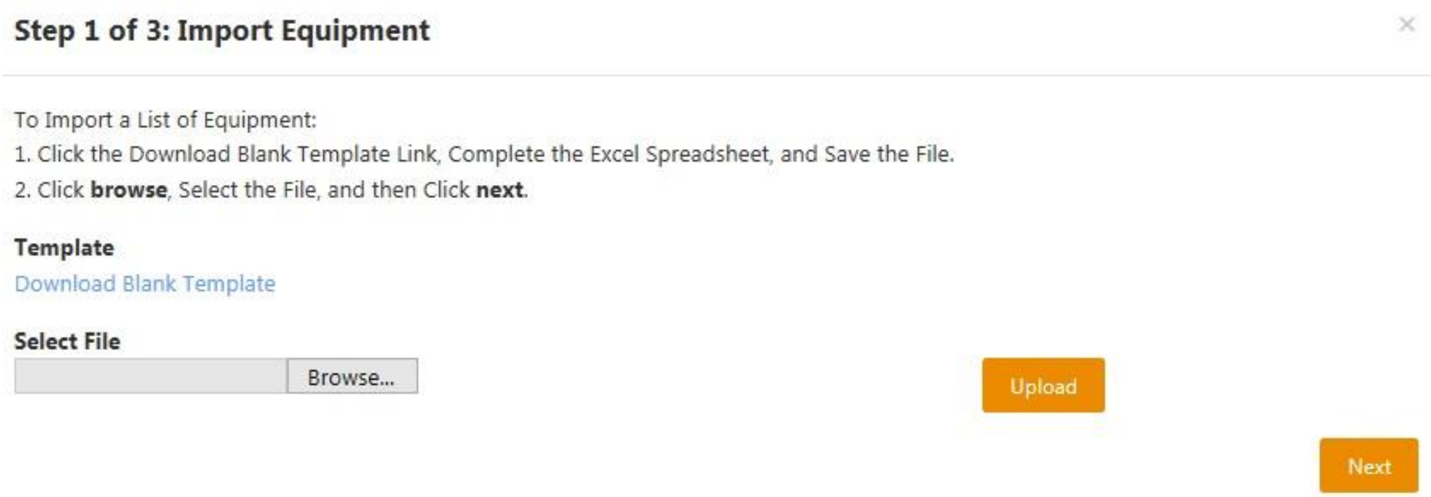
Select items from the grid or select all and then click the **Print** link to print the Equipment List report. Click **Save to Excel** to export to Excel.

Change Status



Select items from the grid and then click the **Change Status** link to change to Active or Retired.

Import Equipment



1. Click the **Download Blank Template** link to download an .xlsx file. Complete the following fields:

Field	Description
Equipment Type	Enter Capital Equipment, Supply or Drug to denote the type.
Equipment Name	Enter the name of the equipment (e.g., stethoscope).
Unique ID Name	Enter a unique alphanumeric ID for the equipment.
Description	Enter the equipment description.
Purchase Price	Enter the purchase price (numeric values only).
Available Quantity	Enter the available quantity.
Reorder Alert Quantity	Enter the quantity that will generate an alert to reorder.
Units	Enter the units of the inventory item consistent with the same unit type used when scheduling a session.

2. After completing and saving the equipment spreadsheet, browse for and select the file, and then upload it to continue using the import wizard:

Step 2 of 3: Import Equipment

Preview the List of Equipment. Click **update** to Overwrite the Balance Quantity or Click **add** to Add this Quantity to the Existing Balance Quantity, and then Click **import**.

Type	Equipment Name	Unique ID Name	Description	Purchase Price	Available Quantity	Reorder Alert Quantity	Units	Barcode	Validation
Capital	Equipment Name	name1	Description	100	0	0	100	93756	Pass
Supply	name		Description	200	200	50	100	12345	Pass

2 record(s) found... 10 1

Quantity
Update Add

Back Import

3. Review your import information. Click **Back** to return to Step 1, or click **Import** to proceed.

Step 3 of 3: Import Equipment

Imported List of Equipment. Click **Finish** to Exit

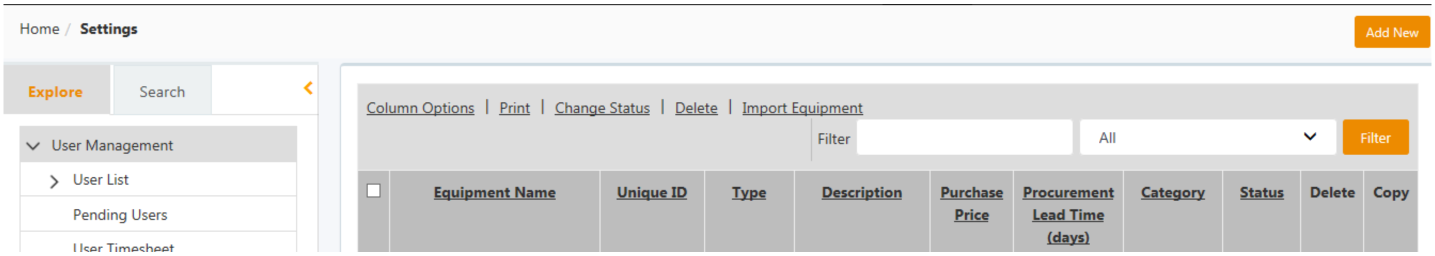
Type	Equipment Name	Unique ID Name	Description	Purchase Price	Available Quantity	Reorder Alert Quantity	Units	Barcode	Import Status
Capital	Equipment Name	name1	Description	100	0	0	100	93756	Success
Supply	name		Description	200	200	50	100	12345	Success

2 record(s) found... 10 1

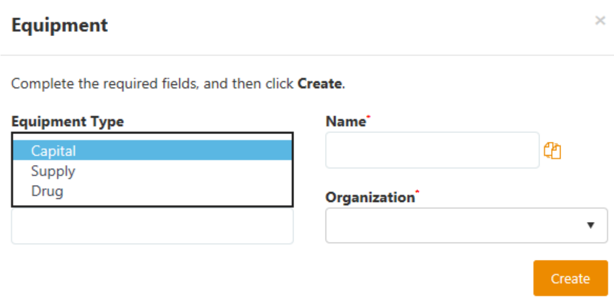
Finish

4. A status message appears in the last column. Click **Finish**.

Add New Inventory

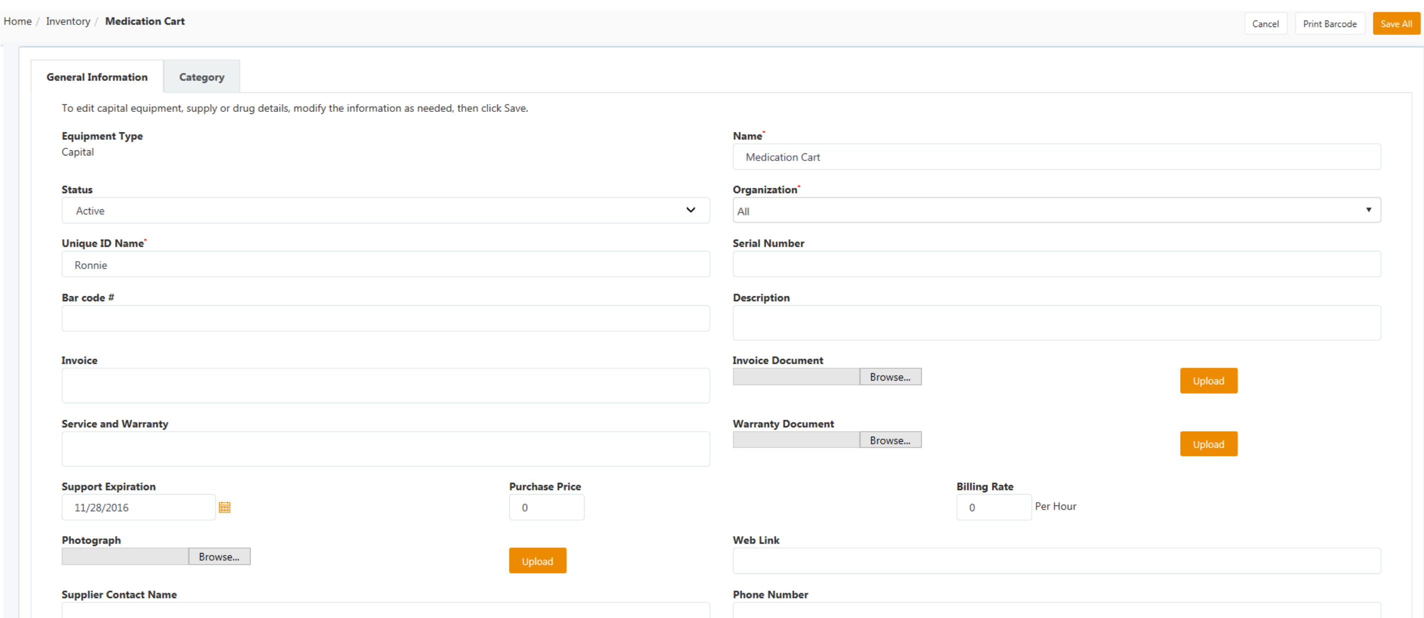


1. Click **Settings > Inventory** > **Add New**.



2. Select the **Type of Equipment** (Capital, Supplies or Drugs) you want to add to inventory.
3. Enter the **Equipment Name** or click the **Copy** icon to copy.
4. Enter a **Unique ID.** This can be changed in item's Activity page after you click Create.
5. Click **Create.**

Add Capital Equipment



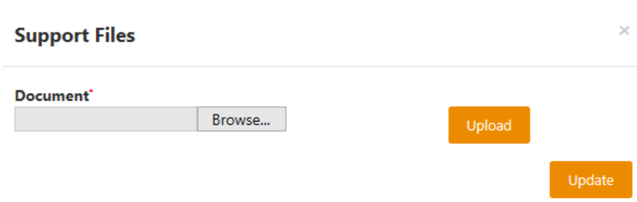
Complete the required fields:

Field	Description
Name*	Enter the equipment name (defaults from the prior entry).
Status	Select Active or Retired from the drop-down list.
Unique ID Name*	Enter the unique ID (defaults from the prior entry).
Serial Number	Enter the serial number for the equipment.
Description	Enter a description of the equipment.
Invoice	Enter details on the invoice used for purchasing the equipment.
Invoice Document	Browse for a scanned copy of the invoice and click Upload to attach the invoice at this field.
Service and Warranty	Enter service and warranty details at this field.
Warranty Document	Browse for a scanned copy of the warranty document and click Upload to attach the document at this field.
Support Expiration	Select a support expiration date for the equipment or enter a date at this field.
Purchase Price	Enter the purchase price of the equipment.
Billing Rate	Enter the billing rate for use of the equipment, if applicable.
Photograph	Browse for a photograph of the equipment and click Upload to attach the photo at this field.
Web Link	Enter a web link for the equipment manufacturer or distributor.
Supplier Contact Name	Enter the name of the contact used for acquiring the equipment.
Phone Number	Enter the phone number of the equipment contact person.
Keywords	Enter any keywords applicable to the equipment that will facilitate a web search for it.
* Required field	

Add Support File

Add support files such as a photo of the item, assembly instructions, or any other supporting documentation.

1. Click **Add Support File**.



2. Complete the required fields:

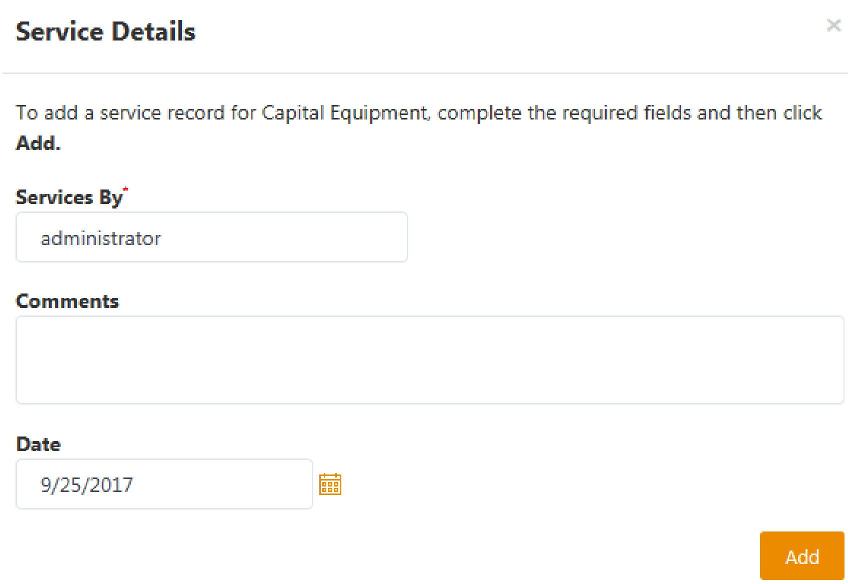
Field	Description
Document*	Name of the support file.
Browse	Search for a support file.
Upload	Upload the file.

Update	Add the document to the equipment information.
* Required field	

Add Service Details

Add a service record for capital equipment.

1. Click **Add Services Details.**



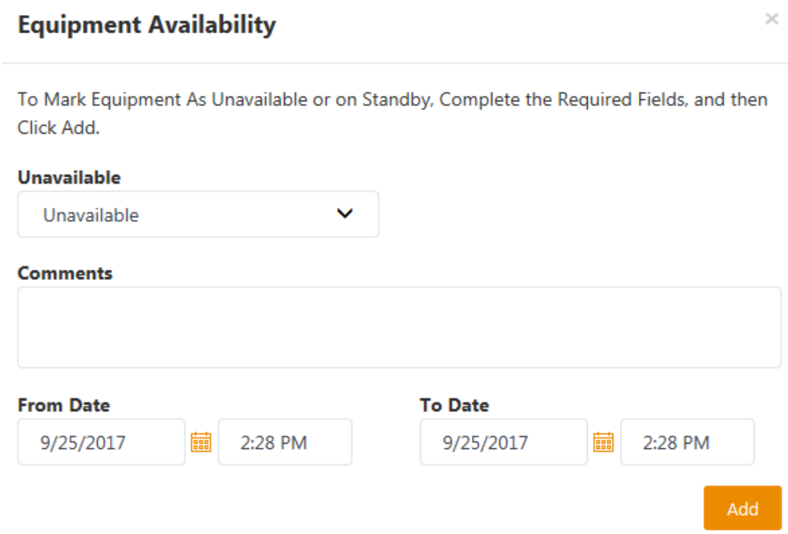
2. Complete the required fields:

Field	Description
Services By*	Enter the name of the user entering service details.
Comments	Enter service details at this text field.
Date	Select a date that this information was entered or enter a date at this field.
Add	Add the details to the equipment information.
* Required field	

Add Availability

Mark equipment as unavailable or on standby.

1. Click **Add Availability**.



2. Enter comments and dates of availability.

3. Click **Add**. The Availability will be reflected in **Session Calendar > Availability > Inventory.**

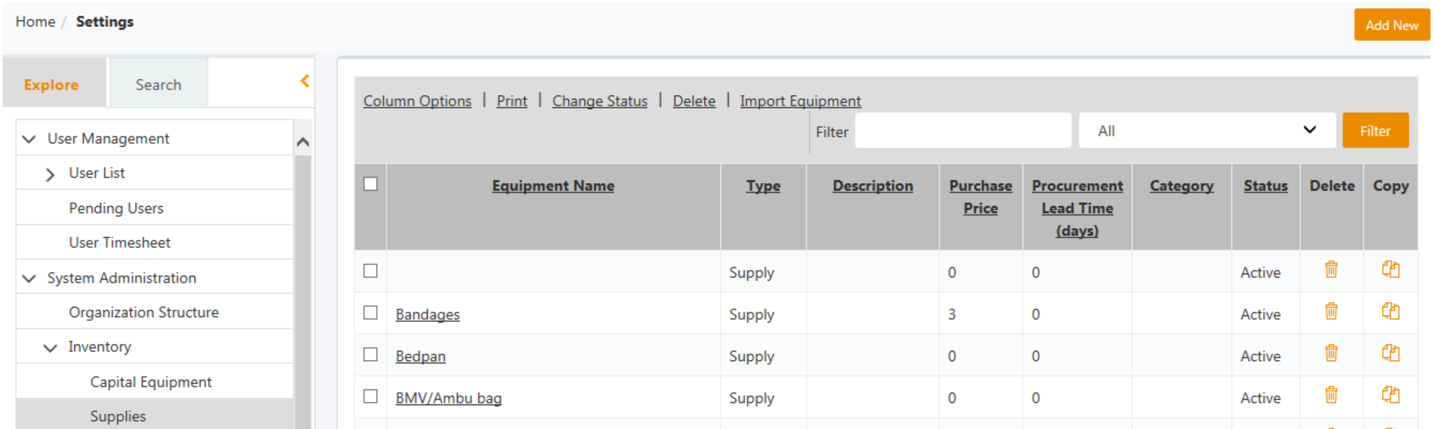
Enter the following information:

Field	Description
Unavailable	Select Unavailable as the default or Standby if the equipment will be available in the future.
Comments	Enter any comments related to the equipment.
From Date	Enter the date and time when the equipment will start to be unavailable or on “stand by.”
To Date	Enter the date and time when the equipment will no longer be unavailable or on “stand by.”
Add	Add the document to the equipment information.

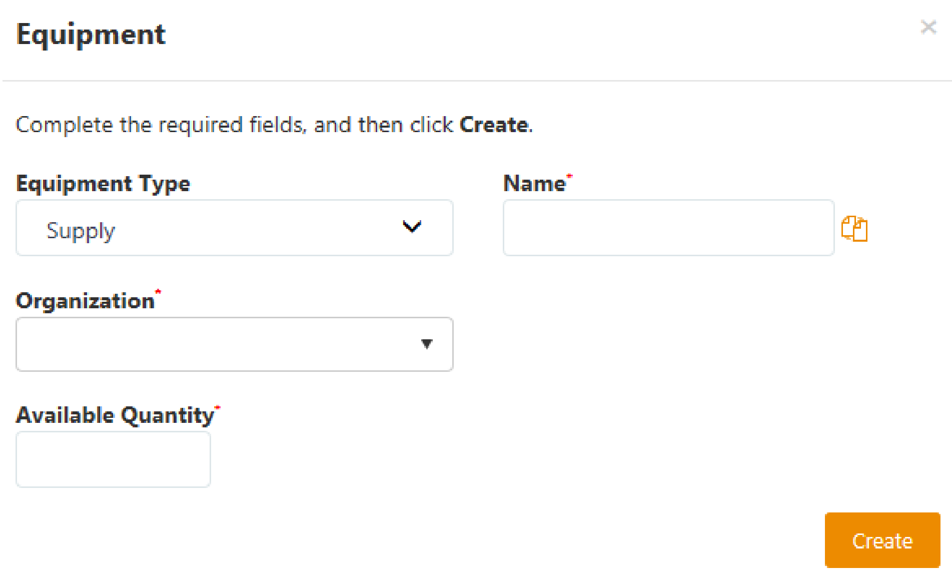
Click Save to retain your selections. The Capital item appears in the grid on the landing page.

Supplies

To view all the Supplies in the database, click **Settings > Inventory > Supplies** to sort the grid by Supplies. If marked as “Disposable” when the equipment type and quantity is selected for the session, it is automatically removed from the inventory.



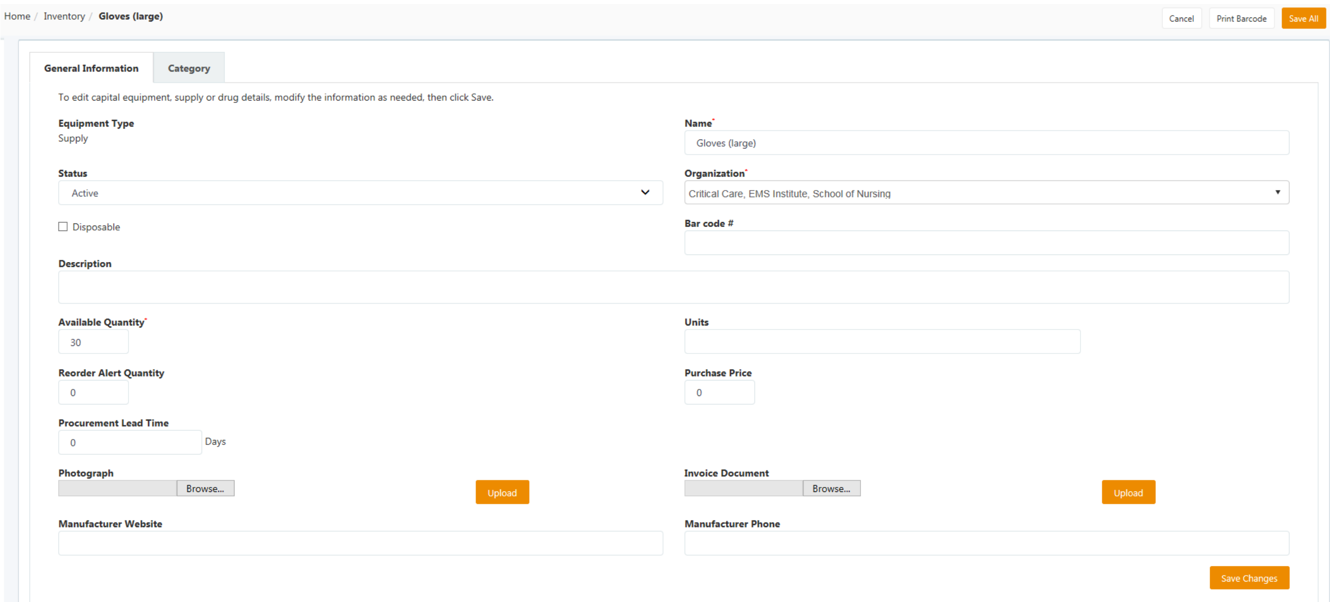
1. Click **Add New**.



2. Complete the required fields:

Field	Description
Equipment Type	Select either Capital, Supply or Drug (this populates based on the Inventory Type chosen at the Explore tab).
Name*	Enter the name of the supply item.
Available Quantity*	Enter the Available Quantity of the supply item.
* Required field	

3. Click **Create**.



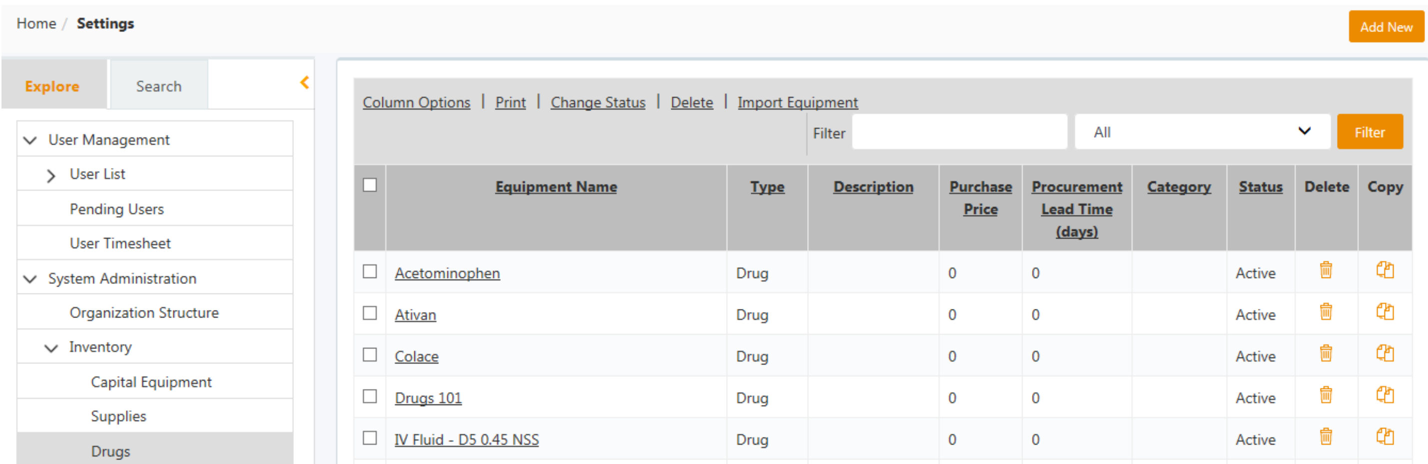
4. Complete the required fields:

Field	Description
Name*	Enter the supply name (defaults from the prior entry).
Status	Select Active or Retired from the drop-down list.
Disposable	Click this checkbox to indicate if this is a disposable item. *This is how it will be deducted from inventory when scheduled in a session.*
Description	Enter a description of the supply item.
Available Quantity*	Enter the available quantity of the item (e.g., 10 boxes of tongue depressors).
Units	Enter the units of the inventory item consistent with the same unit type used when scheduling a session.
Reorder Alert Quantity	Enter the quantity of items that require a reorder alert.
Purchase Price	Enter the purchase price of the supply item by unit.
Procurement Lead Time	Enter the number of days to be allowed for supply item delivery from the manufacturer.
Photograph	Browse for a photograph of the supply item and click Upload to attach the photo at this field.
Invoice Document	Browse for a scanned copy of the invoice and click Upload to attach the invoice at this field.
Manufacturer Website	Enter a web link for the supply item manufacturer or distributor.
Manufacturer Phone	Enter a phone number for a contact person associated with the supply item.
* Required field	

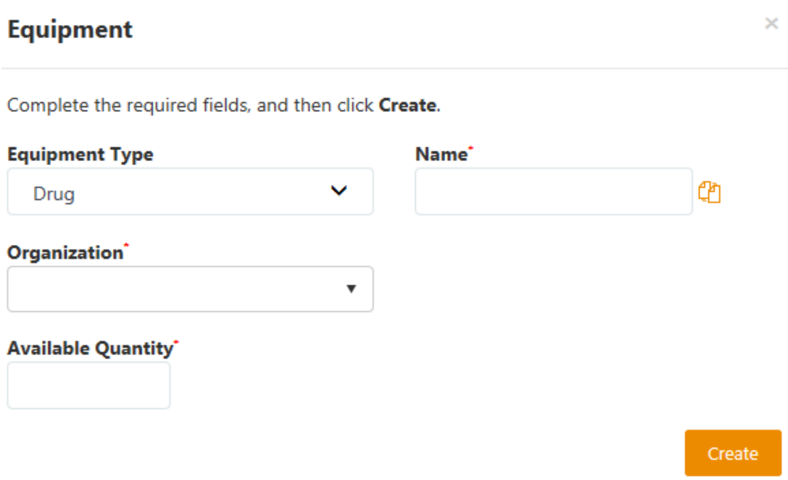
5. Click **Save**. The Supply item appears on the grid on the landing page.

Drugs

To view all the Drugs in the database, click **Settings > Inventory > Drugs** to sort the grid by Drugs. Drugs marked as “disposable” will be deducted from inventory automatically when scheduled in a session.



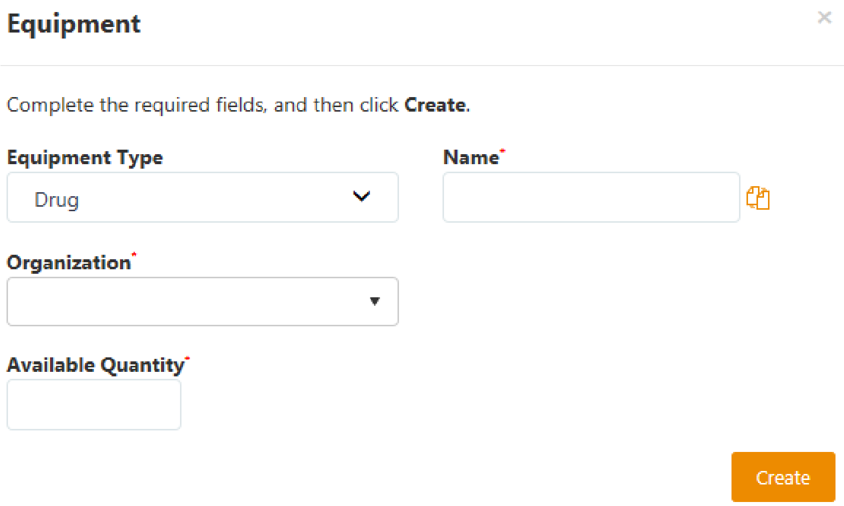
1. Click **Add New**.



2. Complete the following fields:

Field	Description
Equipment Type	Select either Capital, Supply or Drug (this populates based on the Inventory Type chosen at the Explore tab).
Name*	Enter the name of the drug item.
Available Quantity*	Enter the Available Quantity of the drug item.
* Required field	

3. Click **Create**.



Complete the required fields:

Field	Description
Name*	Enter the equipment name (defaults from the prior entry).
Status	Select Active or Retired from the drop-down list.
Disposable	Click this checkbox to indicate if this is a disposable item. *This is how it will be deducted from inventory when scheduled in a session.*
Description	Enter a description of the drug item.
Available Quantity*	Enter the available quantity of the item (e.g., 10 bottles of Ibuprofen).
Units	Enter the number of units per item (e.g., 100 250 mg pills per bottle).
Reorder Alert Quantity	Enter the quantity of items that require a reorder alert.
Purchase Price	Enter the purchase price of the drug item by unit.
Procurement Lead Time	Enter the number of days to be allowed for drug item delivery from the manufacturer.
Photograph	Browse for a photograph of the drug item and click Upload to attach the photo at this field.
Invoice Document	Browse for a scanned copy of the invoice and click Upload to attach the invoice at this field.
Manufacturer Website	Enter a web link for the supply item manufacturer or distributor.
Manufacturer Phone	Enter a phone number for a contact person associated with the drug item.
* Required field	

Click **Save**. Drug item appears on the grid on the landing page.