

## 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**:

Home / Settings Add New

Explore

- ▼ User Management
  - > User List
  - Pending Users
  - User Timesheet
- ▼ System Administration
  - Organization Structure
  - ▼ Inventory
    - Capital Equipment
    - Supplies
    - Drugs

Column Options | Print | Change Status | Delete | Import Equipment

Filter

All
Filter

<input type="checkbox"/>	Equipment Name	Unique ID	Type	Description	Purchase Price	Procurement Lead Time (days)	Category	Status	Delete	Copy
<input type="checkbox"/>			Supply		0	0		Active		
<input type="checkbox"/>	Acetaminophen		Drug		0	0		Active		
<input type="checkbox"/>	Ativan		Drug		0	0		Active		
<input type="checkbox"/>	Bandages		Supply		3	0		Active		
<input type="checkbox"/>	Bedpan		Supply		0	0		Active		
<input type="checkbox"/>	BMV/Ambu bag		Supply		0	0		Active		

## Grid Options

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

## Column Options

**Column Options** ×

Click the **Add Column** arrow to add an available column; or click the **Remove Column** arrow to remove selected columns.

**Available Columns**

⇄

**Selected Columns**

- Unique ID
- Type
- Description
- Purchase Price

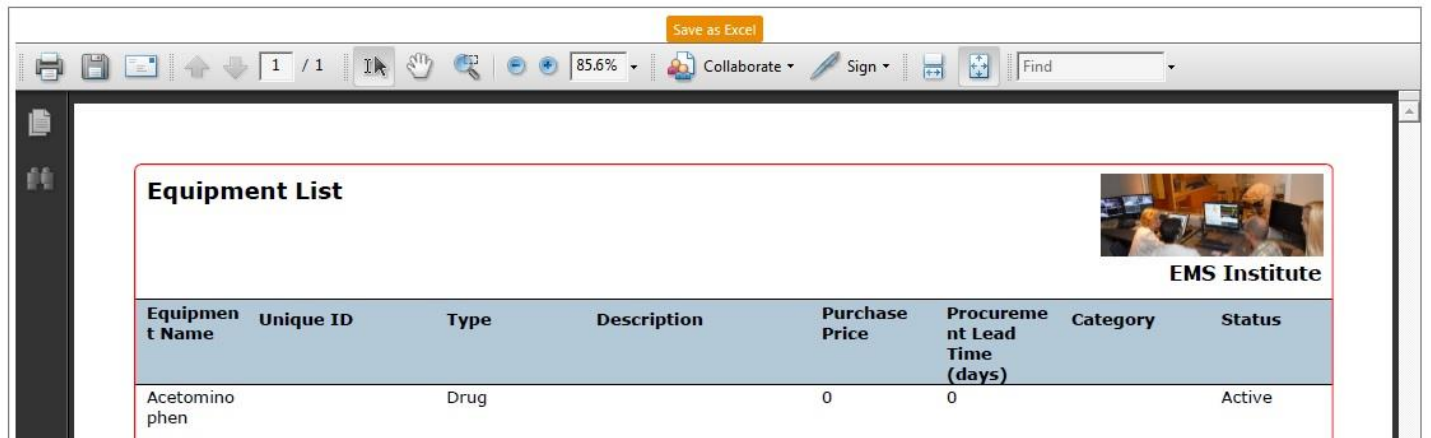
↑
↓

Save

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

## Print Options

Report ✕



Equipment Name	Unique ID	Type	Description	Purchase Price	Procurement Lead Time (days)	Category	Status
Acetaminophen		Drug		0	0		Active

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

### Change Status ✕

In the **Status** field, click the drop-down arrow to select the desired status and then click **Change Status**.

Equipment Name	Unique Name	Type	Status
Acetaminophen		Drug	Active

1 record(s) found... 1 ▾ 1

#### Status

Active ▾

**Change Status**

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

## Import Equipment

### Step 1 of 3: Import Equipment ×

To Import a List of Equipment:

1. Click the Download Blank Template Link, Complete the Excel Spreadsheet, and Save the File.
2. Click **browse**, Select the File, and then Click **next**.

#### Template

[Download Blank Template](#)

#### Select File



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

Field	Description
<b>Equipment Type</b>	Enter Capital Equipment, Supply or Drug to denote the type.
<b>Equipment Name</b>	Enter the name of the equipment (e.g., stethoscope).
<b>Unique ID Name</b>	Enter a unique alphanumeric ID for the equipment.
<b>Description</b>	Enter the equipment description.
<b>Purchase Price</b>	Enter the purchase price (numeric values only).
<b>Available Quantity</b>	Enter the available quantity.
<b>Reorder Alert Quantity</b>	Enter the quantity that will generate an alert to reorder.
<b>Units</b>	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

Home / Settings Add New

Explore Search

- User Management
  - User List
  - Pending Users
  - User Timesheet

Column Options | Print | Change Status | Delete | Import Equipment

Filter  All Filter

<input type="checkbox"/>	Equipment Name	Unique ID	Type	Description	Purchase Price	Procurement Lead Time (days)	Category	Status	Delete	Copy

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

**Equipment** ×

Complete the required fields, and then click **Create**.

**Equipment Type**

- Capital
- Supply
- Drug

**Name\***

 Copy

**Organization\***

**Create**

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

Home / Inventory / Medication Cart Cancel Print Barcode Save All

**General Information** Category

To edit capital equipment, supply or drug details, modify the information as needed, then click Save.

**Equipment Type**  
Capital

**Status**  
Active ▼

**Unique ID Name\***  
Ronnie

**Bar code #**

**Invoice**

**Service and Warranty**

**Support Expiration**  
11/28/2016 📅

**Photograph**  
 Browse... Upload

**Supplier Contact Name**

**Name\***  
Medication Cart

**Organization\***  
All ▼

**Serial Number**

**Description**

**Invoice Document**  
 Browse... Upload

**Warranty Document**  
 Browse... Upload

**Purchase Price**  
0

**Billing Rate**  
0 Per Hour

**Web Link**

**Phone Number**

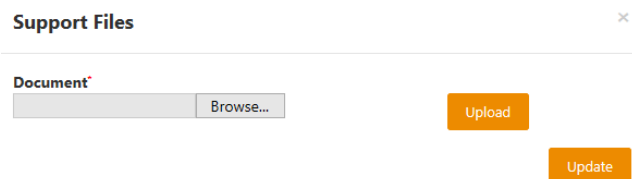
Complete the required fields:

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

<b>Upload</b>	Upload the file.
<b>Update</b>	Add the document to the equipment information.
* Required field	

### Add Service Details

Add a service record for capital equipment.

1. Click **Add Services Details**.

**Service Details** ×


---

To add a service record for Capital Equipment, complete the required fields and then click **Add**.

**Services By\***

**Comments**

**Date**

2. Complete the required fields:

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

### Add Availability

Mark equipment as unavailable or on standby.

1. Click **Add Availability**.

### Equipment Availability ×

To Mark Equipment As Unavailable or on Standby, Complete the Required Fields, and then Click Add.

**Unavailable**

**Comments**

**From Date**



**To Date**



Add

2. Enter comments and dates of availability.
3. Click **Add**. The Availability will be reflected in **Session Calendar > Availability > Inventory**.
4. Enter the following information:

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

5. 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.



Home / **Settings** Add New

**Explore** Search

- ▼ User Management
  - > User List
  - Pending Users
  - User Timesheet
- ▼ System Administration
  - Organization Structure
- ▼ Inventory
  - Capital Equipment
  - Supplies**

Column Options | Print | Change Status | Delete | Import Equipment

Filter  All Filter

<input type="checkbox"/>	Equipment Name	Type	Description	Purchase Price	Procurement Lead Time (days)	Category	Status	Delete	Copy
<input type="checkbox"/>		Supply		0	0		Active		
<input type="checkbox"/>	Bandages	Supply		3	0		Active		
<input type="checkbox"/>	Bedpan	Supply		0	0		Active		
<input type="checkbox"/>	BMV/Ambu bag	Supply		0	0		Active		

1. Click **Add New**.

### Equipment ×

Complete the required fields, and then click **Create**.

**Equipment Type**

Supply
▼

**Name\***

**Organization\***

▼

**Available Quantity\***

**Create**

2. Complete the required fields:

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

3. Click **Create**.

Home / Inventory / Gloves (large) Cancel Print Barcode Save All

**General Information** Category

To edit capital equipment, supply or drug details, modify the information as needed, then click Save.

**Equipment Type**  
Supply

**Name\***  
Gloves (large)

**Status**  
Active ▼

Disposable

**Organization\***  
Critical Care, EMS Institute, School of Nursing ▼

**Description**

**Bar code #**

**Available Quantity\***  
30

**Units**

**Reorder Alert Quantity**  
0

**Purchase Price**  
0

**Procurement Lead Time**  
0 Days

**Photograph** Browse... Upload

**Invoice Document** Browse... Upload

**Manufacturer Website**

**Manufacturer Phone**

**Save Changes**

4. Complete the required fields:

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

Home / Settings Add New

Explore Search

- ▼ User Management
  - > User List
  - Pending Users
  - User Timesheet
- ▼ System Administration
  - Organization Structure
- ▼ Inventory
  - Capital Equipment
  - Supplies
  - Drugs

Column Options | Print | Change Status | Delete | Import Equipment

Filter  All Filter

<input type="checkbox"/>	Equipment Name	Type	Description	Purchase Price	Procurement Lead Time (days)	Category	Status	Delete	Copy
<input type="checkbox"/>	<a href="#">Acetaminophen</a>	Drug		0	0		Active		
<input type="checkbox"/>	<a href="#">Ativan</a>	Drug		0	0		Active		
<input type="checkbox"/>	<a href="#">Colace</a>	Drug		0	0		Active		
<input type="checkbox"/>	<a href="#">Drugs 101</a>	Drug		0	0		Active		
<input type="checkbox"/>	<a href="#">IV Fluid - D5 0.45 NSS</a>	Drug		0	0		Active		

1. Click **Add New**.

**Equipment** ×

Complete the required fields, and then click **Create**.

**Equipment Type** Name\*

Drug

**Organization\***

**Available Quantity\***

Create

2. Complete the following fields:

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

3. Click **Create**.

## Equipment ×

Complete the required fields, and then click **Create**.

**Equipment Type** **Name\***

Drug

**Organization\***

**Available Quantity\***

**Create**

4. Complete the required fields:

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

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