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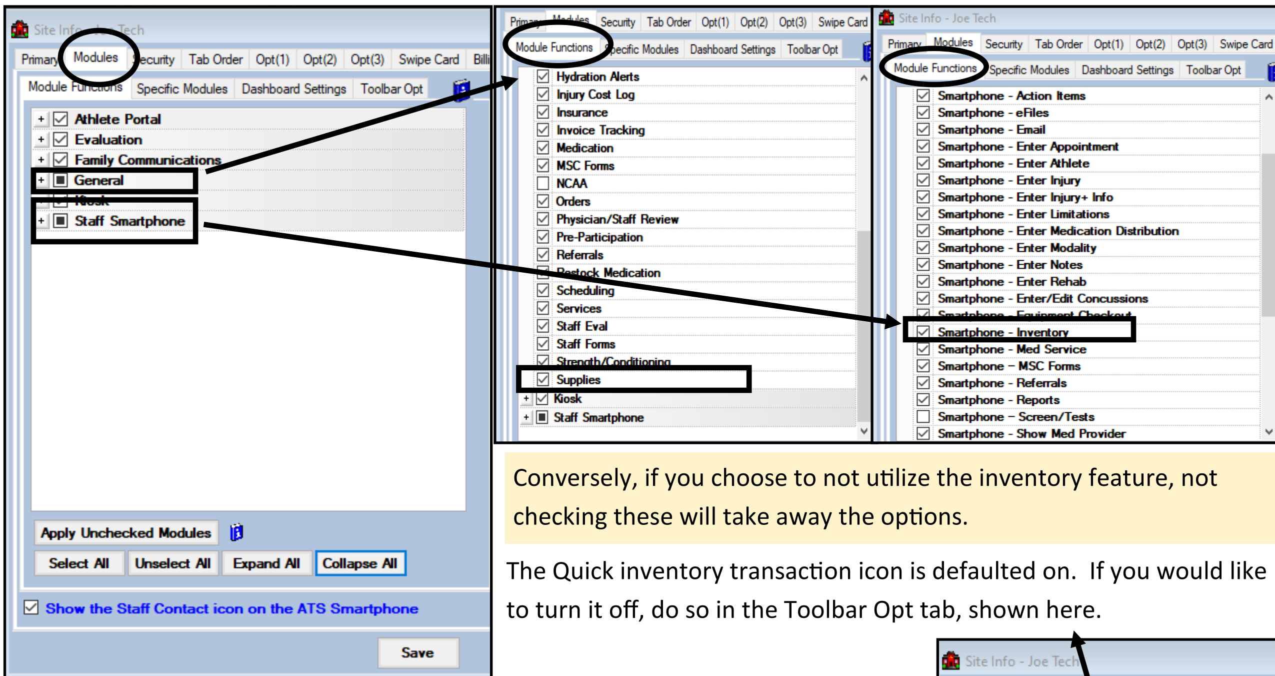
Inventory Configuration

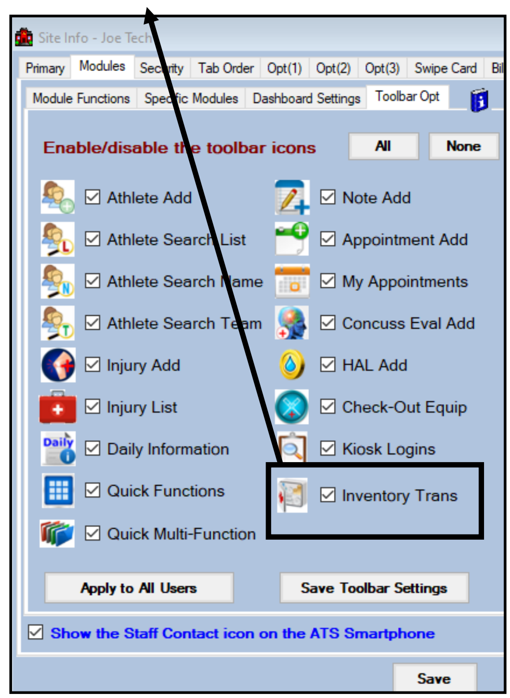
To begin utilizing the inventory feature of ATS, there are several setup processes that should be configured prior to attempting to add your inventory items. Like other fields in ATS, you are able to customize the drop down lists, popups, or other menu items within the inventory module.

To begin, start in your ADMIN—> =Site Info—> Modules tab. Go to the general tab, and ensure the “Supplies” module is turned on. If you want to utilize the staff phone portal to track inventory, ensure it is turned on. Stay in Site Info—>Modules—>Staff Phone—> Smartphone Inventory.

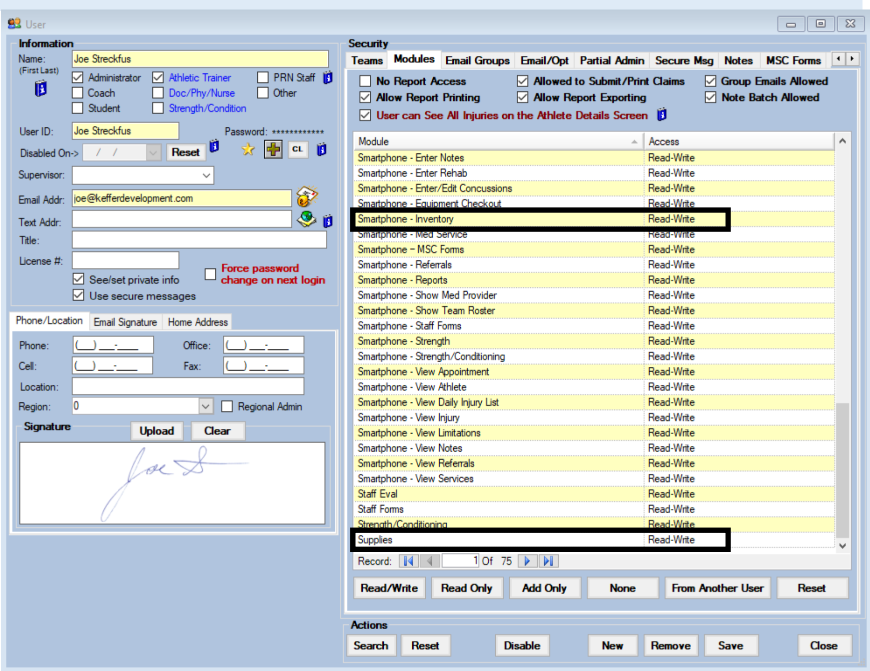


Conversely, if you choose to not utilize the inventory feature, not checking these will take away the options.

The Quick inventory transaction icon is defaulted on. If you would like to turn it off, do so in the Toolbar Opt tab, shown here.

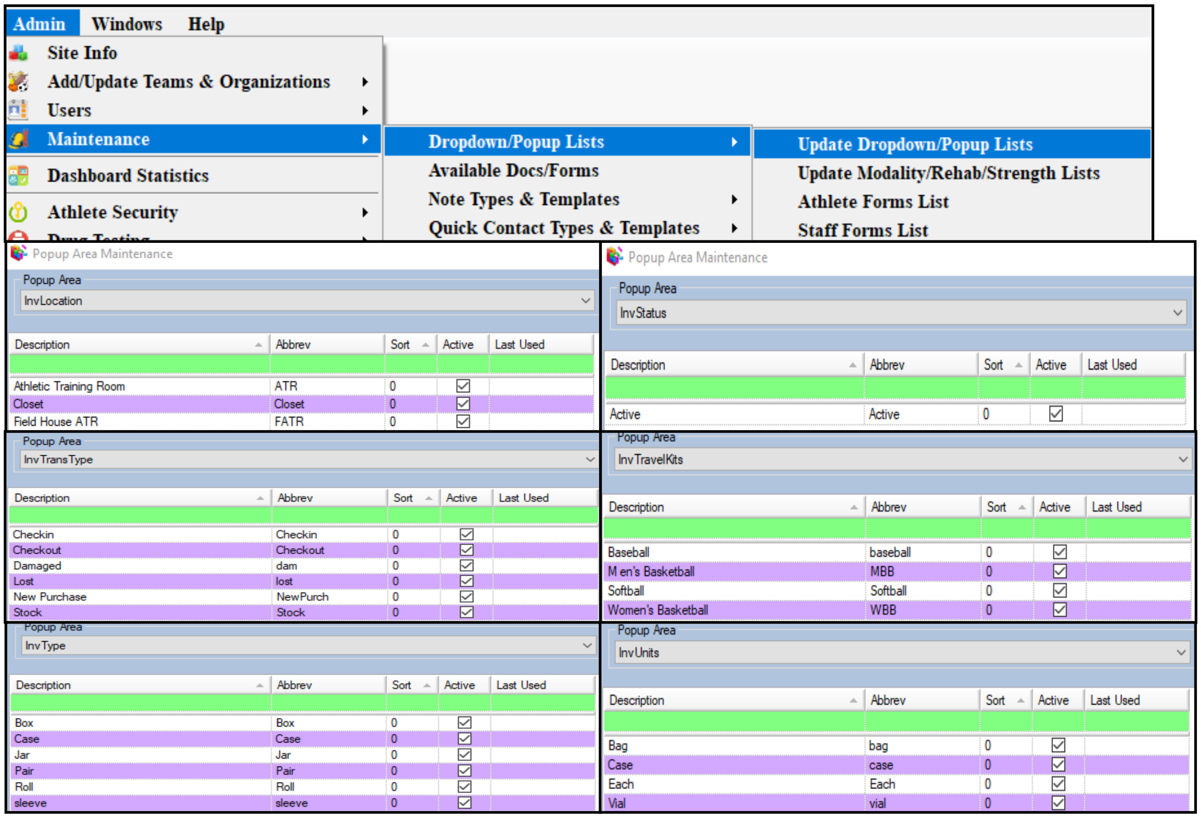


After configuring that part of Site Info. You will need to verify that the athletic trainers have read/write access to the inventory. That is done by going to the user profiles and giving read/write access under the module tab. Also, decide if they need access on the smartphone.



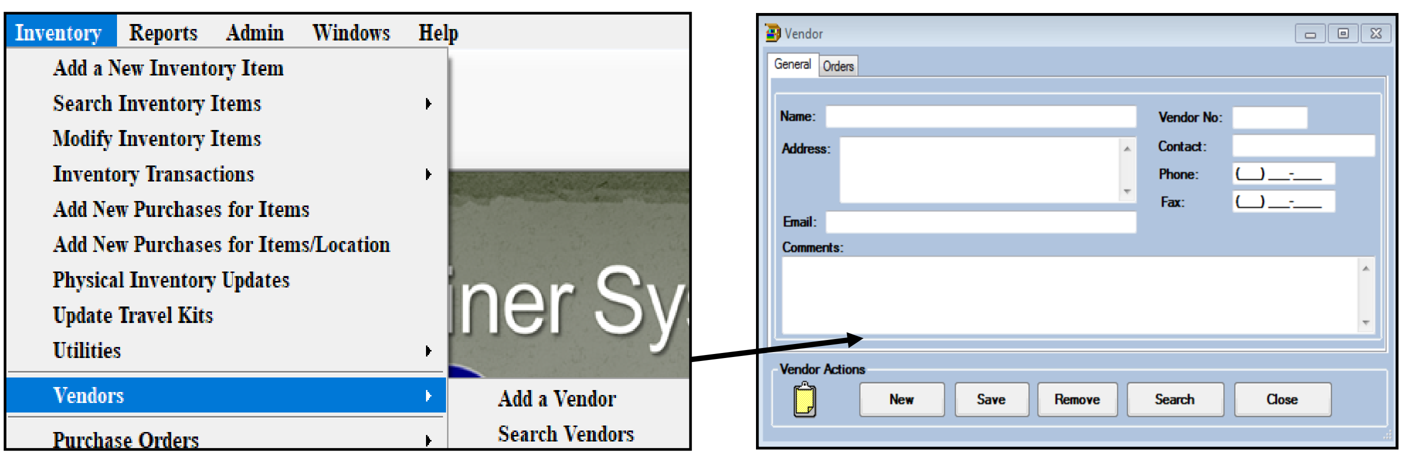
Setting Dropdown Inventory Lists

Before adding inventory it is recommended you create your customized inventory lists. This will ensure that all of the drop downs are available for you to assign, track and organize your lists. Use the following lists to customize the inventory.



Setting a Vendor

To begin setting up vendors for the inventory process, begin by going to the Inventory menu item—> vendor—> add vendor. This allows you to run a variety of reports, award bids. It is very important for the import and export process which we will cover later.

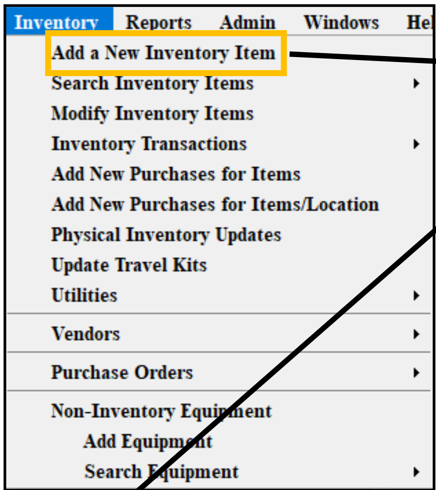


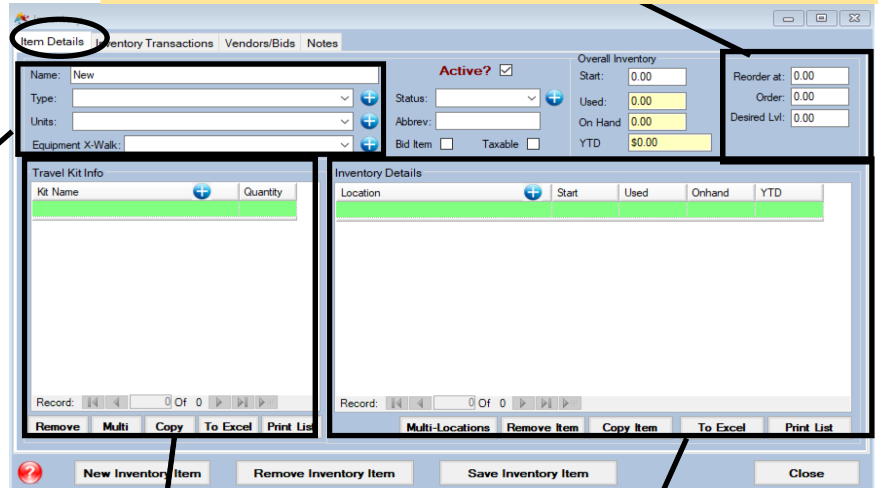
At a minimum the vendor name and number must be entered. To aid in the process of ordering, you are able to enter the remaining information.

This will also help categorize your inventory for other functions.

Inventory Menu Items

Set your **REORDER AT** number, how many to **ORDER**, and if you want a **DESIRED LEVEL** of inventory to maintain.





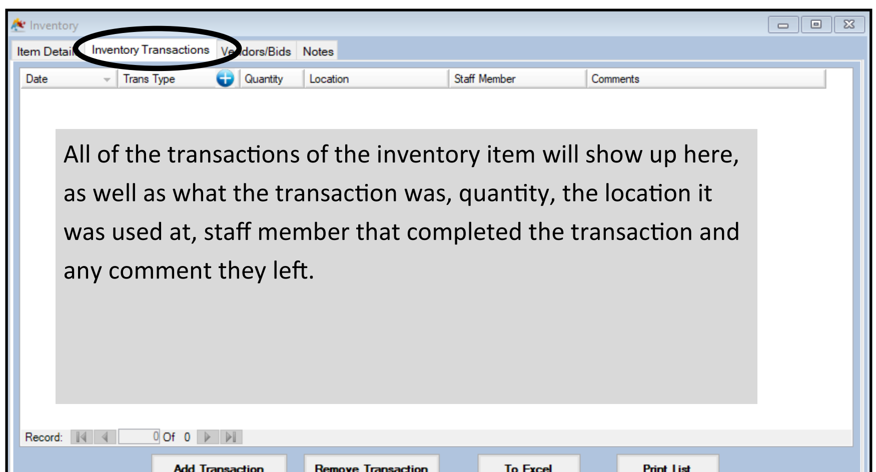
Name: Enter the name of your inventory item.

Type/Unit: Can be used in place of each other, or in conjunction, to further refine your inventory. Example type could be medication, unit could be packs.

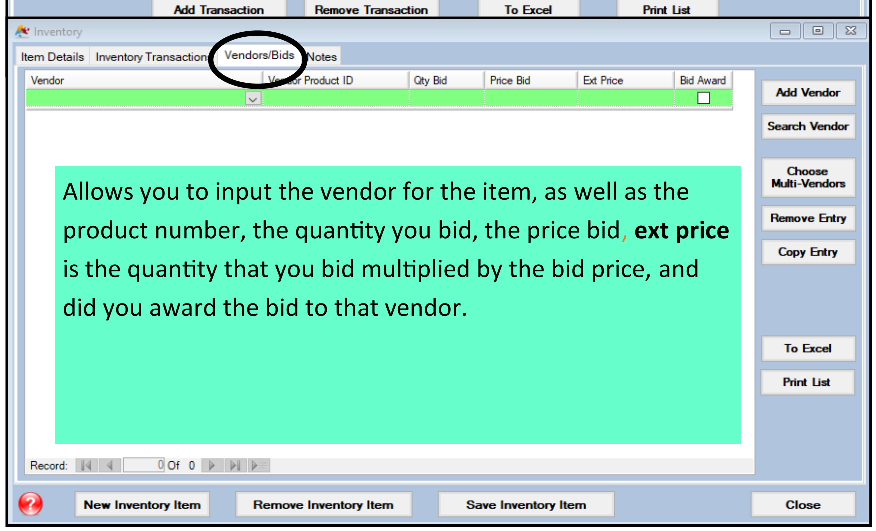
Equipment X-Walk: Allows you to cross walk or tie the inventory item to a piece of equipment. Will also tie the inventory/equipment item to the equipment checkout feature if you do not already have it listed.

Allows you to input specific inventory items into a kit, to mark them as checked out as well as to keep track of how much has been used out of that kit.

Allows you to sort the inventory item location. If the item will be stored in multiple facilities, you can add a **START** number, **USED** out of that facility, how many are **ON HAND**, **YTD=** cost associated with that item.

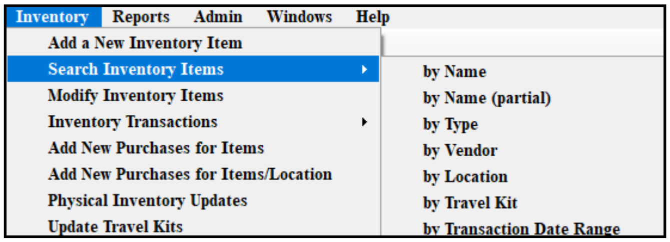


All of the transactions of the inventory item will show up here, as well as what the transaction was, quantity, the location it was used at, staff member that completed the transaction and any comment they left.



Allows you to input the vendor for the item, as well as the product number, the quantity you bid, the price bid, **ext price** is the quantity that you bid multiplied by the bid price, and did you award the bid to that vendor.

Search Inventory Items: allows you to search for an item, by any of the menu items below. After you select your search, and possibly the item to search for, or the other parameters, it will take you to the item page.



Modify Inventory Items: will pull the complete list of your inventory items. Think of it as the quick multi function for inventory. It contains everything, and allows you many different features for editing, tracking, signing out, clearing and resetting inventory. The functions will be described.

Search Bar

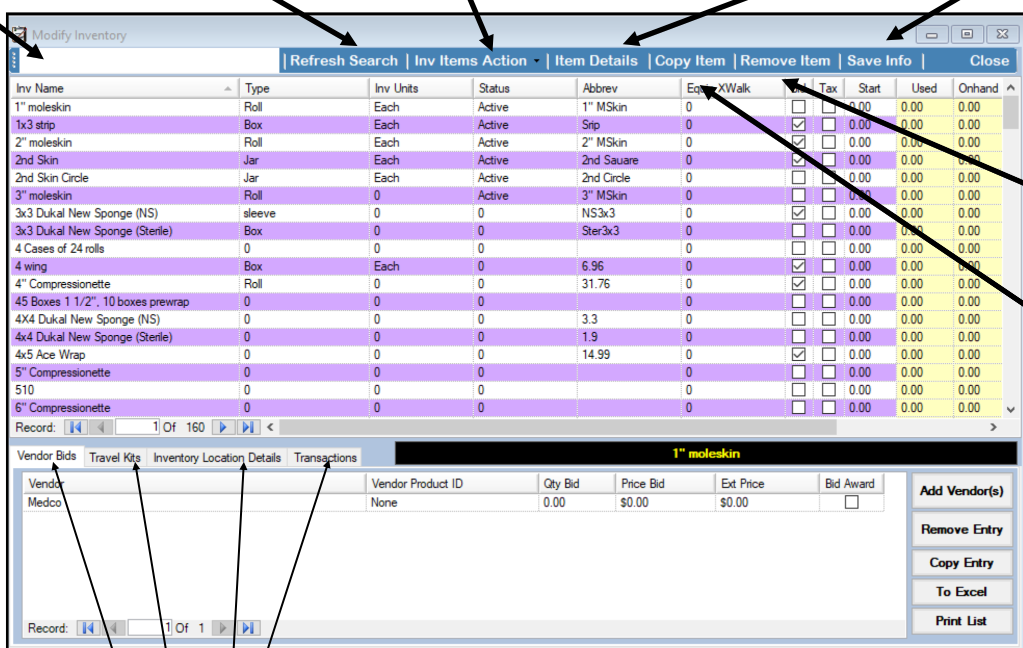
Refresh the inventory page

Inv item action

More info below

Opens the individual Item Details

Save changes made

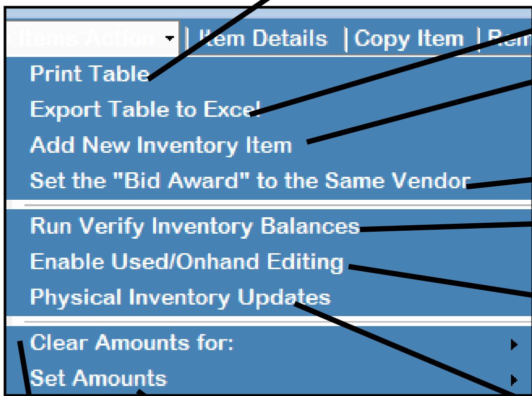


Delete the item

Copy the item for to use/edit new entry.

Once an inventory item is chosen; the 4 tabs will be populated and function like the main inventory screen.

Inv Item Actions:



Print the inventory screen

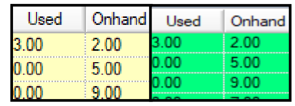
Export inventory to excel

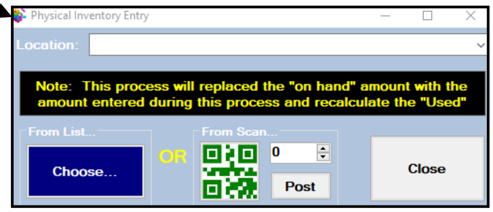
Allows you to enter a new inventory item, from the add item screen.

Allows you to award the bid to the same vendor.

Also called the Re-calc process. Updates your numbers

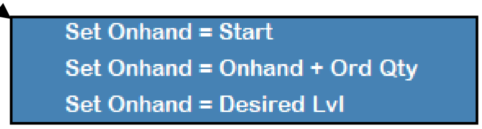
Admin only feature, change the used/ onhand yellow column to green open text field, from modify inv screen.





Allows you to do your inventory, item by item and update what is on hand.

These functions clear the corresponding numbers for your inventory.



Set onhand= start

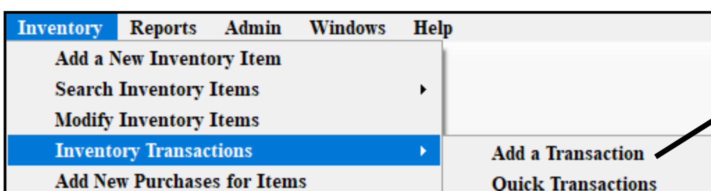
Will transfer the START column to the ON HAND column

SetOH= onhand+order qty

Updates the on hand to what is ON HAND plus what is in the ORDER QTY column

SetOH=Desired LVL

sets ON HAND to what is in DESIRED LVL column

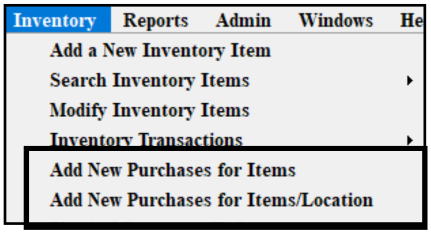


Allows you to select the inventory item, the location and how many "units, cases" etc were utilized.

Inventory Transactions are shown in greater detail in following pages

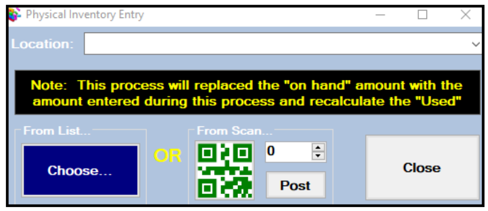
If you have quick inventory buttons defined, you will see them on this screen. They would be the commonly set items, defined by the system admin, in site info. This allows you quick access to complete a transaction, of commonly utilized supplies.

New purchases:

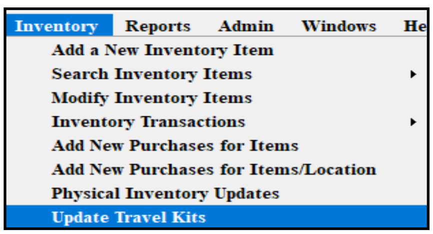


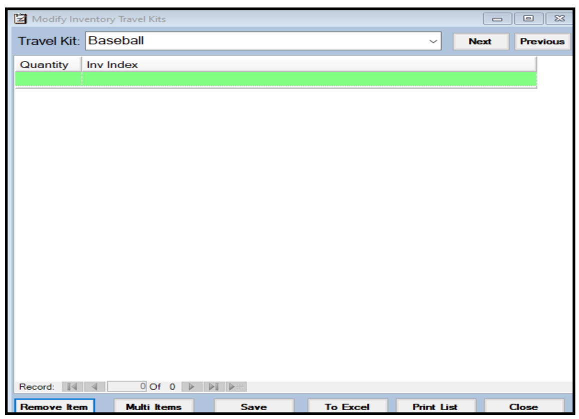
Allows you to select the inventory item, to update and input the new purchased amount. For items, or for the item at any of the locations you have set.

Inventory update

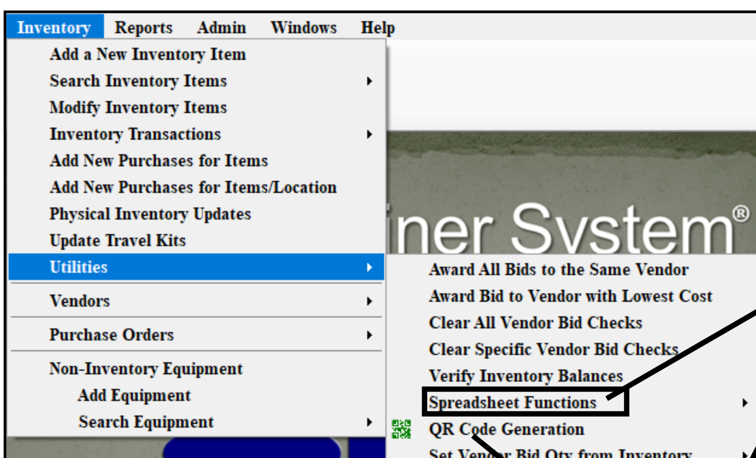


Allows you to do your inventory, item by item and update what is on hand. This is the same screen from Modify Inventory Items. If you set QR codes you can scan and track inventory that way as well.



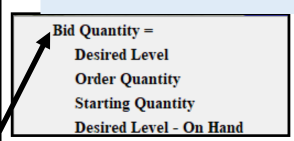


Update travel kits allows you to track the supplies in the kits for your athletic trainers have in them. Or if you have teams that travel without someone, you can effectively keep track of what is being used, when the kit is restocked.



Inventory utilities allows you to award bids, depending on criteria you want. Clear the bids, verify the balances (recalc process). You can create QR codes to aid in inventory tracking efficiency.

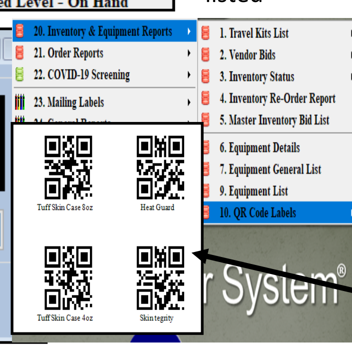
Spread sheet functions will be discussed in greater detail in the following pages.



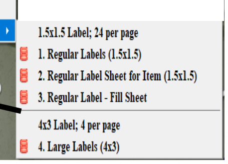
Allows you to generate bid numbers from the categories listed

After you have inventory in your database, you can utilize the QR generator to create QR codes for all of your supplies.

Post inventory QR codes generates the code. To view the codes, select the report, of which size you wish to use.



Choose the size of your QR labels



Spread Sheet Functions:

The inventory module allows you many different ways to input your inventory list into ATS. There are specific import and export functions that are tied together. Those functions are color coded, for export and import.

The specific export/import functions will be explained in greater details.

Export
- ...All Inventory Items
- ...Inventory Template (New Items)
- ...Inventory Info with Vendors (for Re-Import)
- ...List for New Purchases (for Re-Import)
- ...Inventory Info with Locations (for Re-Import)

Import
- ...From Inventory Template (New Items)
- ...From Inventory Info with Vendors
- ...From List for New Purchases
- ...From Inventory Info with Locations

Once you have inventory items in ATS, you can export for ease of viewing. This will show you all of the information tied to every item, what your order levels are, desired levels, if you have it cross-walked to an piece of equipment.

Export
...All Inventory Items

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	Item Name	Type	Units	Status	Abbreviation	Bid Item	Taxable	Start Qty	On Hand	Reorder Qty	Qty to Order	Desired Level	Equip Crosswalk	Notes
	1" moleskin	Roll	Each	Active	1" MSkin	FALSE	FALSE	1	2	0	4	0		
	2" moleskin	Roll	Each	Active	2" MSkin	TRUE	FALSE	1	9	0	8	0		
	2nd Skin Circle	Jar	Each	Active	2nd Circle	FALSE	FALSE	5	7	0	2	0		
	2nd Skin	Jar	Each	Active	2nd Sauare	TRUE	FALSE	9	9	0	5	0		
	3" moleskin	Roll		Active	3" MSkin	FALSE	FALSE	74	80	0	6	0		
	3x3 Dukal New Sponge (NS)	sleeve			NS3x3	TRUE	FALSE	8	12	0	4	0		
	1x3 strip	Box	Each	Active	Srip	TRUE	FALSE	1	5	0	4	0		
	3x3 Dukal New Sponge (Sterile)	Box			Ster3x3	FALSE	FALSE	1	9	0	8	0		

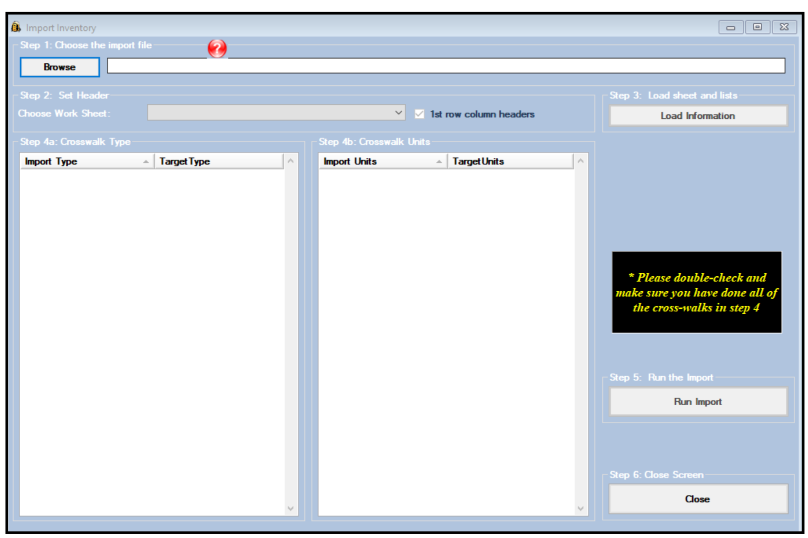
There is no specific import for the **All Inventory Items** export.

...Inventory Template (New Items)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Vendor Name	Item Name	Type	Units	Status	Abbreviation	Bid Item	Taxable	Start Qty	Reorder Qty	Qty to Order	Desired Level	Equip Crosswalk	Vendor Product ID	Qty Bid	Bid Price	Bid Award	Notes
2																		
3																		
4																		
5																		
6																		
7																		
8																		
9																		
10																		
11																		

Provides you a blank spreadsheet, in the correct format, with all of the associated categories that are possible within ATS. It also will pull your dropdown lists for unit, types, any equipment that is entered, and list of vendors. Input inventory in this spreadsheet to aid in uploading. Copy and paste your existing inventory into the appropriate columns, and enter the other associated info.

...From Inventory Template (New Items)



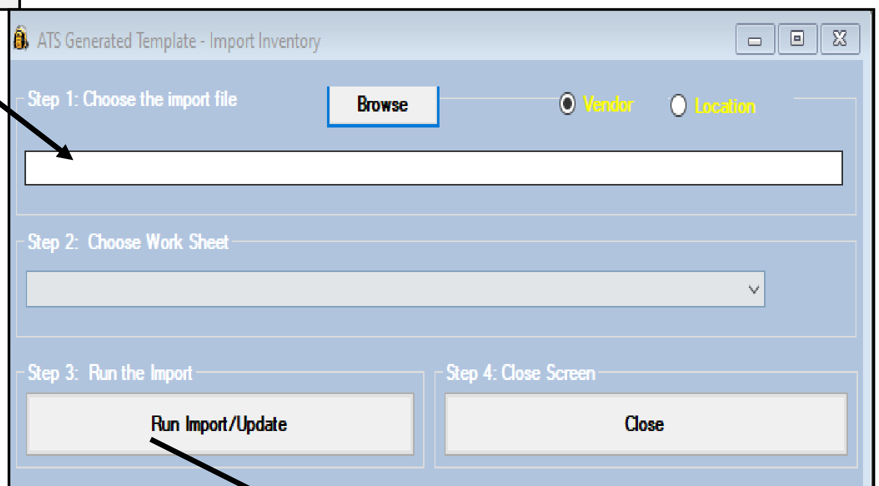
When you select the inventory template import for new items, will show you the screen to the side. This will allow you a chance to see the information contained in the spread sheet, and allow you to crosswalk to information to what is already contained within your database (drop down lists). Utilizing this function ensures your list of items gets into ATS correctly. Crosswalk as necessary.

...Inventory Info with Vendors (for Re-Import)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Vendor Name	Item Name	Type	Units	Status	Abbreviation	Bid Item	Taxable	Start Qty	Reorder Qty	Qty to Order	Desired Level	Equip Crosswalk	Vendor Product ID	Qty Bid	Bid Price	Bid Award	Notes
2	Collins Sports Medicine	3" moleskin	Roll		Active	3" MSkin	FALSE	FALSE	2	0	0	0			0	0	FALSE	
3	Medco	1" moleskin	Roll	Each	Active	1" MSkin	FALSE	FALSE	4	0	0	0		None	0	0	FALSE	
4	Medco	1x3 strip	Box	Each	Active	Srip	TRUE	FALSE	15	0	0	0			0	0	FALSE	
5	Medco	2nd Skin	Jar	Each	Active	2nd Sauare	TRUE	FALSE	12	0	0	0			0	0	FALSE	
6	School/Sports Health	2" moleskin	Roll	Each	Active	2" MSkin	TRUE	FALSE	4	0	0	0			0	0	FALSE	

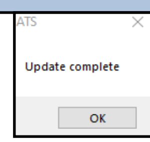
The Purple Export, pulls the inventory items that are contained in your database, with vendor information tied to them. If there is not a vendor assigned, the system will not export any information. You are able to add to the spreadsheet, keeping the format the same, adding the necessary information for uploading.

...From Inventory Info with Vendors



Utilizing the spreadsheet above, and the vendor information, you are able to import your updated list into ATS. Once you have your inventory ready to import select the purple inventory function, you will see the screen shown. Choose the file from your computer and if necessary the work sheet. Then hit the run import/update.

Doing the import/update will add new items, or update existing to the numbers contained in your spreadsheet.

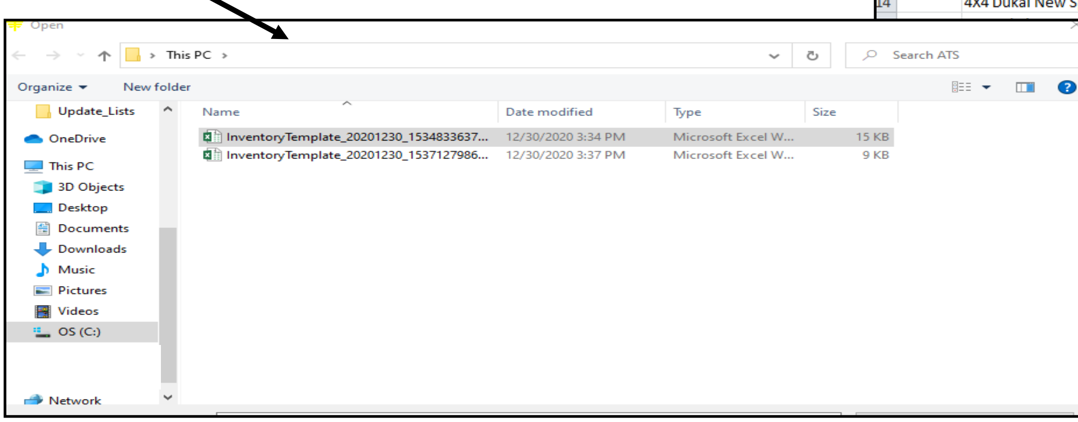


...List for New Purchases (for Re-Import)

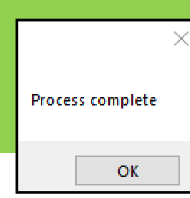
Green export allows you to export and update the information for the beginning of the year inventory, adding the purchase amounts, to update the quantity within your inventory.

	A	B	C	D
1	Location	Item Name	Qty Purchased	Vendor Name
2		1" moleskin	0	Medco
3		1x3 strip	0	
4		2" moleskin	0	
5		2nd Skin	0	
6		2nd Skin Circle	0	
7		3" moleskin	0	
8		3x3 Dukal New Sponge (NS)	0	
9		3x3 Dukal New Sponge (Sterile)	0	
10		4 Cases of 24 rolls	0	
11		4 wing	0	
12		4" Compressionette	0	
13		45 Boxes 1 1/2", 10 boxes prewrap	0	
14		4X4 Dukal New Sponge (NS)	0	

...From List for New Purchases



To import, select green import, it will open the file explorer, select the correct file to update your inventory counts. When it is finished you will see the message below.

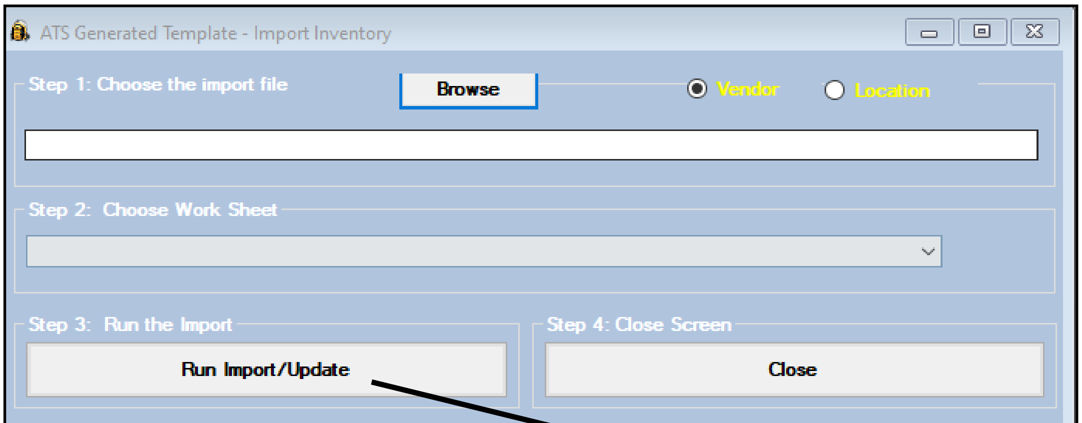


...Inventory Info with Locations (for Re-Import)

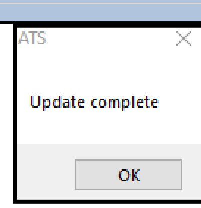
	A	B	C
1	Location	Item Name	Start Qty
2	Athletic Training Room	1" moleskin	4
3	Athletic Training Room	1x3 strip	15
4	Athletic Training Room	2" moleskin	2
5	Field House ATR	2" moleskin	2
6	Athletic Training Room	2nd Skin Circle	3
7			

Blue export will export your current inventory information specific for the location and supplies.

...From Inventory Info with Locations



Choose the import with locations, select the saved spread sheet with your updated information. If necessary, select the work sheet to import. Run the import/update will add any new item, and update the inventory per location.



Your inventory will be updated.

Inventory Utilities:

The Inventory Utilities menu gives you different options for managing supplies.

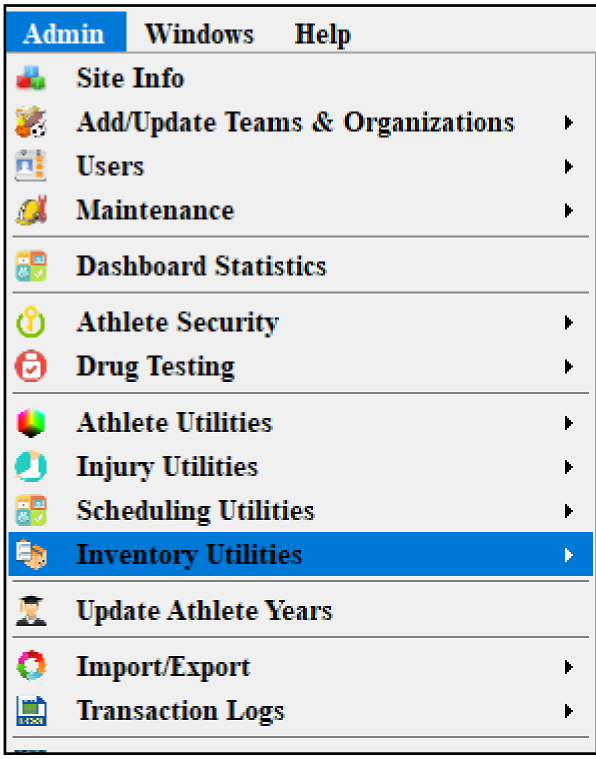
Transactions: Gives you different ways to delete transactions. For the beginning of a new year and you want to zero everything back out.

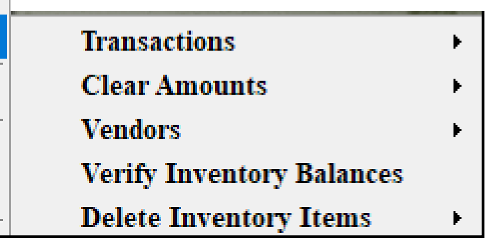
Clear Amounts: Allows you to clear varying item columns, for starting, reorder at, order number and desired level

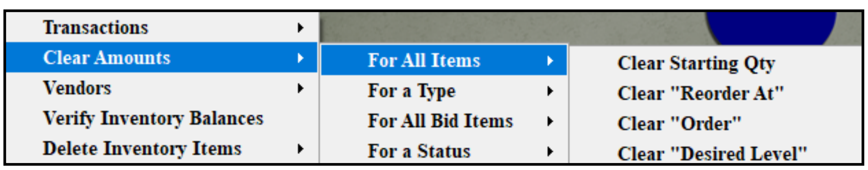
Vendors: allows you to manage bid information to vendors.

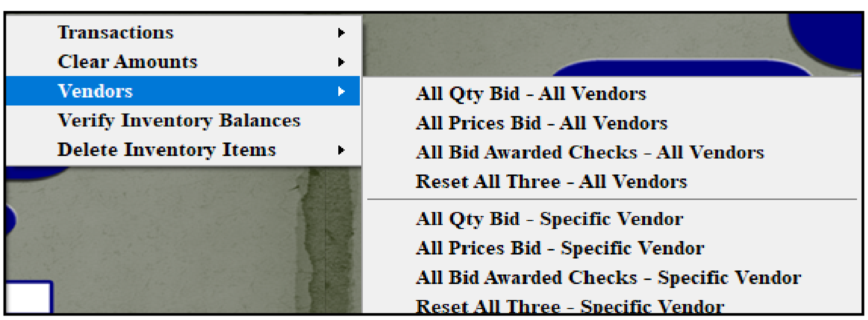
Verify Inventory Balances: is the recalc process, to update the numbers in your inventory sheet.

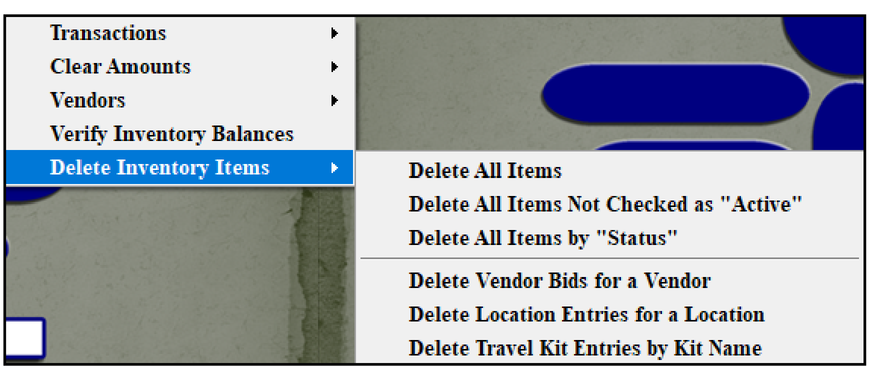
Delete Inventory Items: Allows you to manage and remove specific items, or bulk delete items associated with vendors, locations or kits



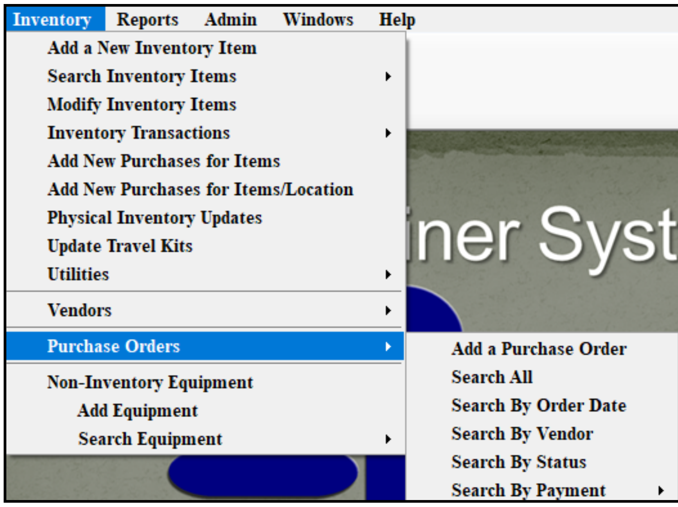




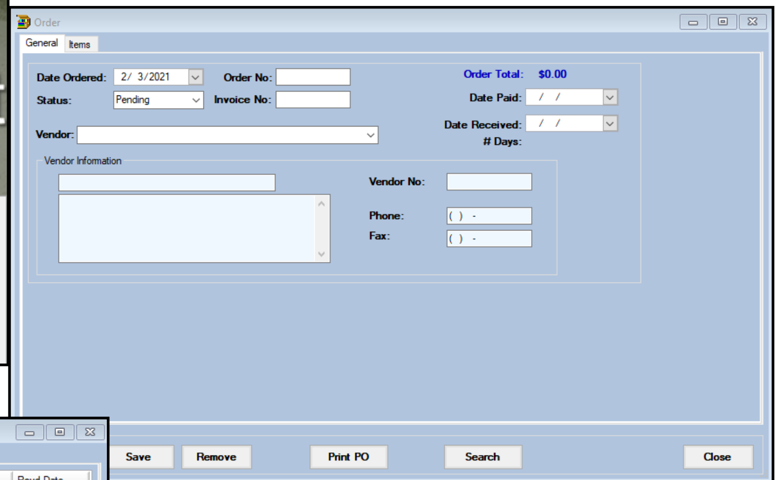


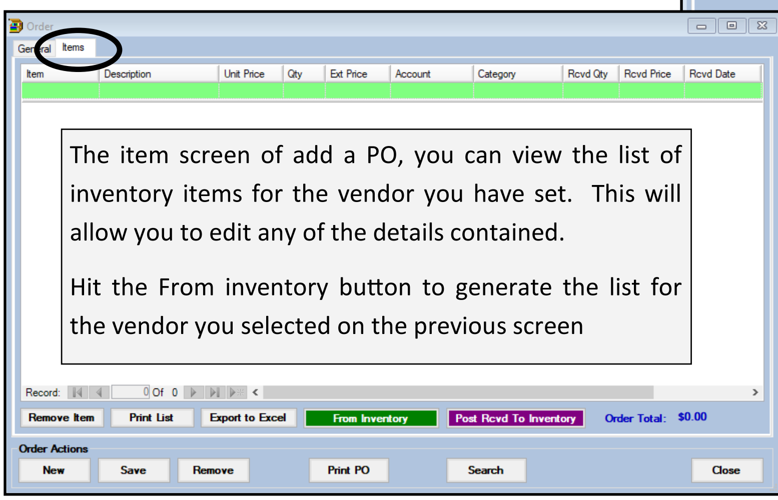


Purchase Orders:



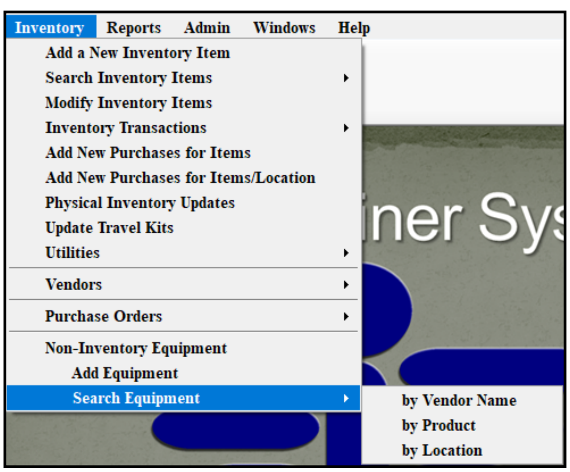
Allows you to add purchase orders, and items for that vendor. It will pull the information you set for that vendor previously.





The item screen of add a PO, you can view the list of inventory items for the vendor you have set. This will allow you to edit any of the details contained.

Hit the From inventory button to generate the list for the vendor you selected on the previous screen



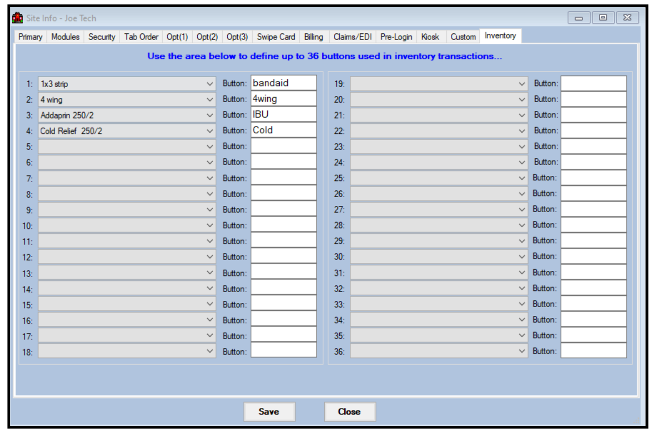
Non-Inventory Equipment allows you to add new equipment that you may be checking out or utilizing.

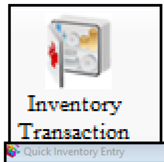
You can also search by vendor, product or locations.

**This also allows you to crosswalk that information into the inventory list.

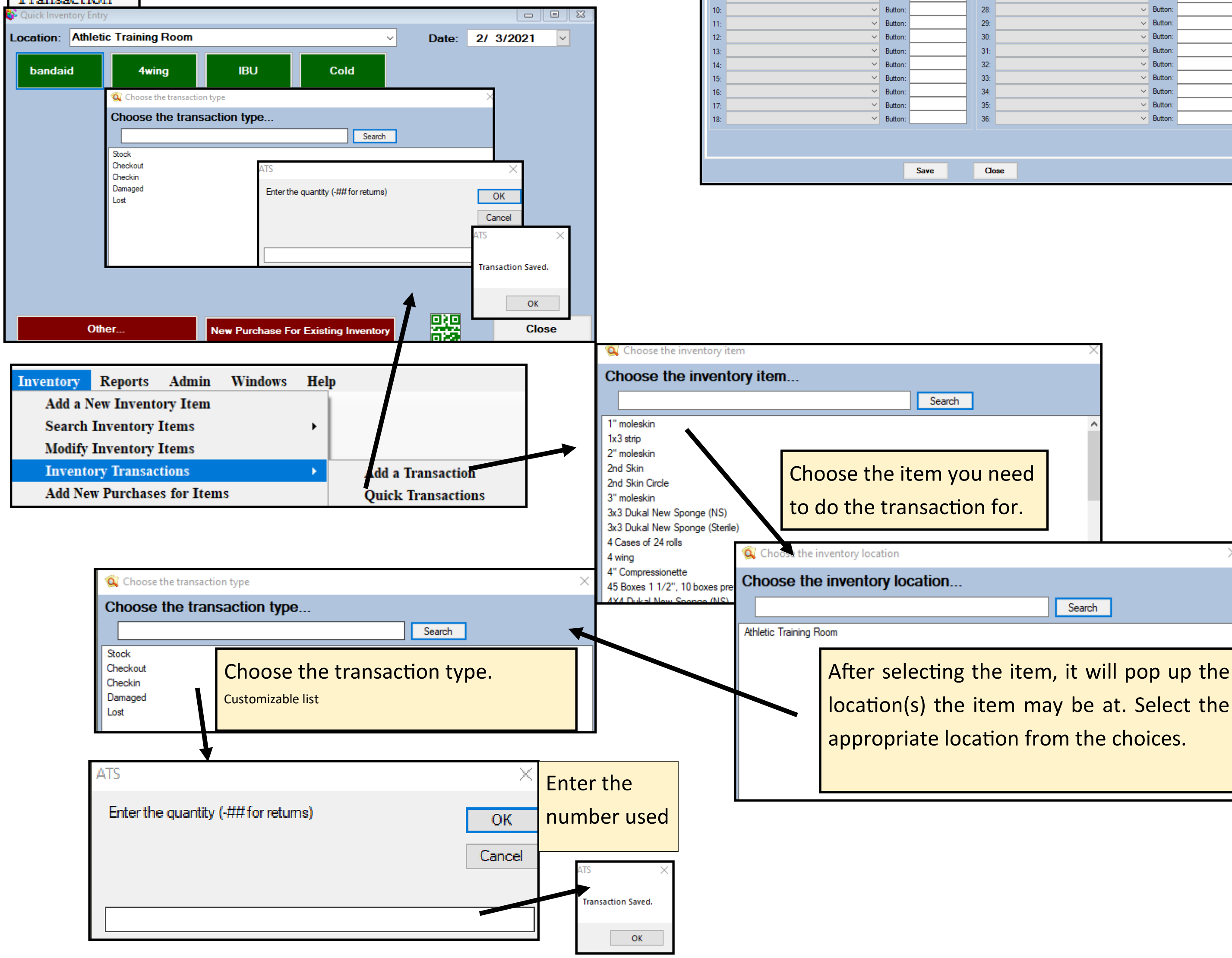
Inventory Transactions:

To aid in "quick" transactions you can set and configure the most commonly used supplies for your organization. Under Site Info, under the Inventory tab the list of inventory items you have entered will populate in the drop downs. Choose one and assign button text that will appear.



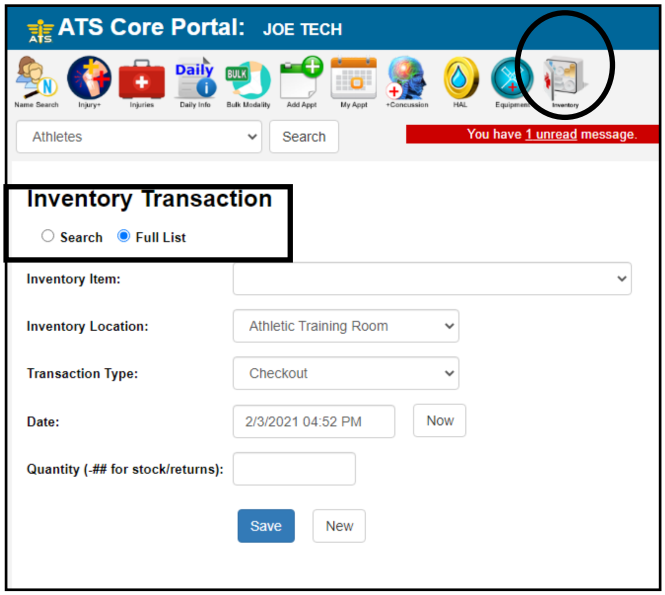


To complete the quick transaction, select the item, and follow menu prompts.



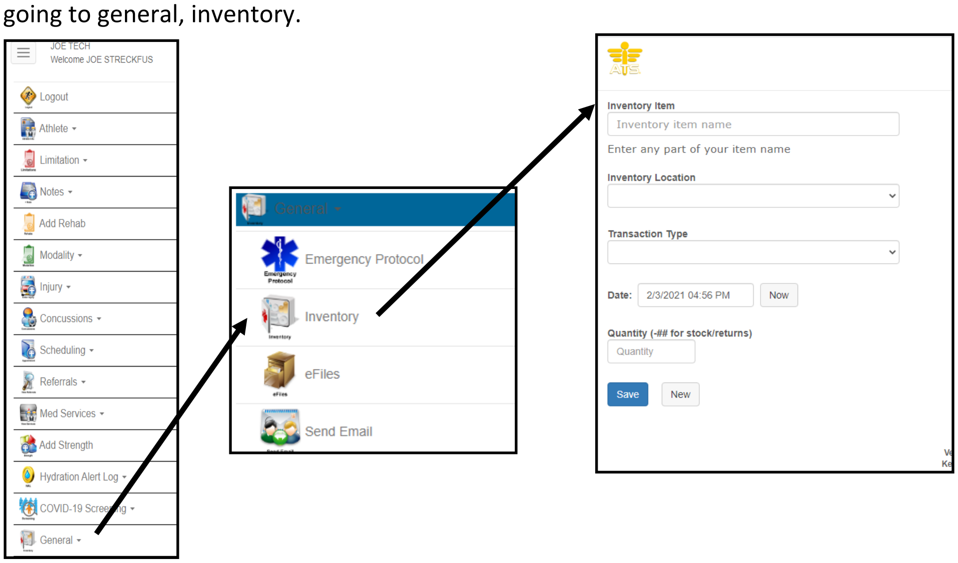
Inventory Transactions from Staff Portal:

You can complete inventory transactions from the staff portal. Utilize the icon to take you to the inventory page. From here you can either search, or see a list of items. Fill in the details to complete the transaction.



Inventory from Staff Phone:

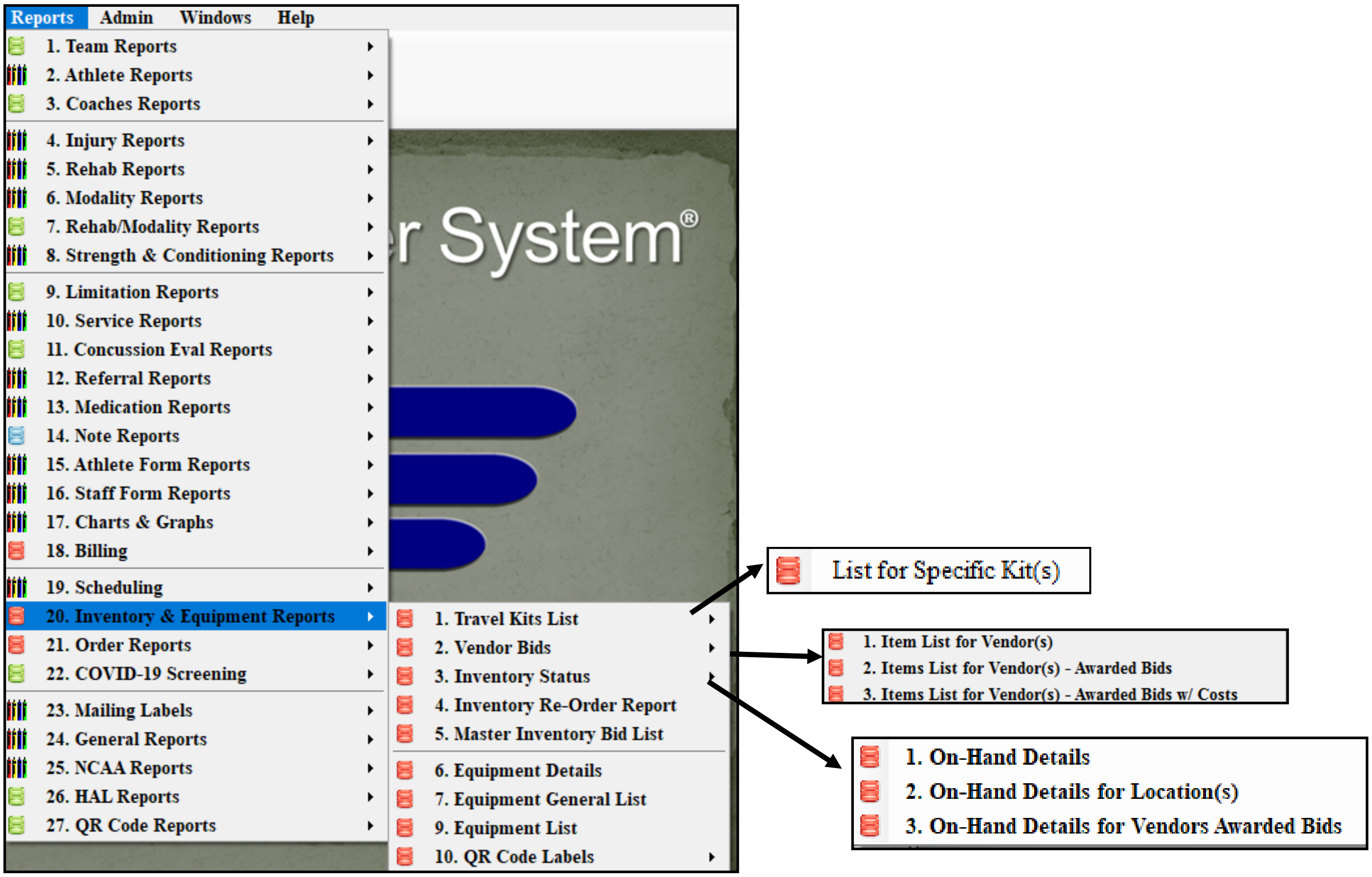
If you have defined inventory as one of your 12 buttons, it will show. Other wise begin by going to general, inventory.



Begin by filling in part of the name, it will generate a list of options, choose the one needed. Fill in location, and type and the quantity. As always, be sure to save your changes.

Viewing your inventory:

Like most areas of ATS, there are several reports you are able to generate to view your inventory. Reports—> #20 Inventory and Equipment—> and any of the associated sub menu items.



There is also a Data Miner for Inventory. Admin—> Data Miner. If you do not see the data miner, speak with your system administrator.