SIS (Simple Inventory System)

Creating a More Efficient Process

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How would you like to???

- Simplify the laboratory’s inventory process?
- Automate supply disbursement with a mini bar-code scanner?
- Reduce physical inventory frequency?
- Reduce Emergency orders?
- Cut your lab’s inventory tracking chores in half?
Objectives

At the conclusion of this session, you should be able to:

• Describe the theory and operation of the SIS module
• Create a master inventory list with lot numbers and out-of-stock threshold levels
• Perform a physical inventory
• Create a shopping list
• Subtract items leaving and Add items into Inventory
What SIS Does and Doesn’t Do

• Does …
  – Provide **daily** current Quantity On Hand
  – Print barcode labels (3 in 9 symbology)
  – Make a Shopping List of items to purchase
  – Manage lot numbers separately
  – Provide audit trail
  – EE11.2 allows cost information

• Does not …
  – Allow real-time inventory checkout
    ▪ The barcode scanner memory holds about 350 barcodes
    ▪ **Daily** (or perhaps weekly), upload scanner memory to the computer
  – Connect directly to an enterprise supply chain system
  – Use the bar codes already on the Vendors packaging

• Advantage: A low cost solution
  – minimal $ in hardware and network infrastructure
Inventory Flow chart

Three Key Counting Processes

• Set Physical Inventory
  – initially
  – Periodically to add new P/N or maintain the process

• Subtract from Inventory
  – when items are removed
  – use the bar code scanner

• Add to Inventory
  – when a shipment is received
Key Concepts

• SIS is a separate program in the tools menu

• Key screens
  – Items
  – Quantity on hand (QOH)
    ▪ reflects physical inventory with additions and subtractions

• Key lists - print or keyboard entry
  – Count sheets to facilitate physical inventory
  – Shopping lists to manage incoming orders
  – Barcodes to manage item usage
Inventory Process Flow

1. Add Item part numbers
2. Set Physical inventory
3. Remove items from stock using scanner
4. QOH warns of low items
5. Shopping list created
6. Materials MGT orders supplies
7. Received order logged into SIS
8. Add Item part numbers
The main item screen

<table>
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<th>Item Group</th>
<th>Item Name</th>
<th>Count Sheet</th>
<th>Part #</th>
<th>Has Lots</th>
<th>Min Qty</th>
<th>Max Qty</th>
<th>Standing Order Qty</th>
<th>Divisor</th>
<th>Active</th>
<th>Location</th>
<th>Vendor</th>
<th>Vendor Part #</th>
<th>Description</th>
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- **items**
- **Part #**
- **Min/max**
- **location**
- **groups**
- **count sheet**
- **Lot #**
Physical Inventory

• Create and print “Count Sheets”
• Count items and record differences
• Enter corrected counts into the SIS count sheet list and Set as Physical Inventory

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<th>Qty</th>
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The Checkout Process

- Place a checkout scanner in each storeroom
- Have employees scan items as they remove them
- Daily, upload data from scanners and Subtract from Inventory
Using the scanner

![Barcode Read Window]

Here is an example of a barcode read window. The table contains the following columns:

- **PartNo**
- **Item Group**
- **Item Name**
- **Active?**
- **Qty**
- **Lot**
- **Expiration**

Here are some items listed:

- **47502** Eximer Reagents, CEA, Active: Yes, Qty: 3
- **47503** Eximer Reagents, CKMB, Active: Yes, Qty: 10
- **47504** Eximer Reagents, CORT, Active: No, Qty: 10
- **47524.Z** Eximer Controls, LiquiControl-3, Active: Yes, Qty: 10
- **99999** Eximer Supplies, AAA Battery, Active: Yes, Qty: 2

**What do you want to do with this list of items?**

- Add to Inventory
- Subtract from Inventory
- This is a Physical Inventory

Note that inactive items and items with no name will be discarded.

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Quantity On Hand (QOH)

- Quantity On Hand (QOH) =
  - Quantity counted at last physical inventory (PI)
  + Sum of all items added since last PI
  - Sum of all items removed since last PI
## QOH Screen

<table>
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<tr>
<th>Item Group</th>
<th>Item Name</th>
<th>Part #</th>
<th>Min Qty</th>
<th>Max Qty</th>
<th>Divisor</th>
<th>Last Physical Inventory Date</th>
<th>Qty On Hand</th>
<th>Qty</th>
<th>Suggest Order</th>
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<th>Last Physical Inventory Date</th>
<th>Qty</th>
<th>Net Add/Remove</th>
<th>Qty On Hand</th>
<th>Suggest Order</th>
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# QOH Report

## EP Evaluator®

Users Manual -- Data Innovations, Inc.

## Inventory Status

### Eximer rgt

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QOH: Suggested ordering

![Screenshot of inventory status (QOH) application]

- **Yellow**: Suggested order > 0
- **Red**: QOH at or below *Min*

### Inventory Status (QOH)

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<tr>
<th>Item Group</th>
<th>Item Name</th>
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<td>10</td>
<td>300</td>
<td>06 Jan 2007</td>
<td>6</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Eximer Reag</td>
<td>PHENB</td>
<td>47513</td>
<td>0</td>
<td>10</td>
<td>50</td>
<td>06 Jan 2007</td>
<td>8</td>
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<td></td>
</tr>
<tr>
<td>Eximer Reag</td>
<td>PHENTOIN</td>
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<td>0</td>
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<td>250</td>
<td>01 Jan 2007</td>
<td>-3</td>
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<td></td>
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<tr>
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<td>47515</td>
<td>0</td>
<td>10</td>
<td>50</td>
<td>06 Jan 2007</td>
<td>-4</td>
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<tr>
<td>Eximer Reag</td>
<td>T3</td>
<td>47516</td>
<td>0</td>
<td>10</td>
<td>250</td>
<td>06 Jan 2007</td>
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<td></td>
</tr>
<tr>
<td>Eximer Reag</td>
<td>T3L</td>
<td>47723</td>
<td>0</td>
<td>10</td>
<td>250</td>
<td>06 Jan 2007</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eximer Reag</td>
<td>T3M</td>
<td>47518</td>
<td>0</td>
<td>10</td>
<td>400</td>
<td>01 Jan 2007</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Latest transaction: 01 06 Jan 2007 03:03:03  Logged on as Administrator (Administrators)
Shopping list on screen

- Modify quantities
- Add new lot numbers
- View total costs

![Shopping List](image)

<table>
<thead>
<tr>
<th>Seq</th>
<th>Group</th>
<th>Item Name</th>
<th>Part Number</th>
<th>Lot Number</th>
<th>ExpDate</th>
<th>Vendor</th>
<th>Qty</th>
<th>Divisor</th>
<th>Unit Price</th>
<th>Total Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Eximer Reagents</td>
<td>CFIB</td>
<td>47501</td>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td></td>
<td>$250.00</td>
<td>$2,500.00</td>
</tr>
<tr>
<td>5</td>
<td>Eximer Reagents</td>
<td>CKMB</td>
<td>47503</td>
<td></td>
<td>2015</td>
<td></td>
<td>1</td>
<td></td>
<td>$300.00</td>
<td>$6,000.00</td>
</tr>
<tr>
<td>9</td>
<td>Eximer Reagents</td>
<td>CORT</td>
<td>47504</td>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td></td>
<td>$250.00</td>
<td>$7,500.00</td>
</tr>
<tr>
<td>14</td>
<td>Eximer Supplies</td>
<td>AAA Battery</td>
<td>99999</td>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td></td>
<td>$150.00</td>
<td>$6,000.00</td>
</tr>
</tbody>
</table>
# Shopping list for purchasing

**EP Evaluator**

Clinical Laboratory -- Kennett Community Hospital

### Shopping List

**Shopping list for vendor AAA**

<table>
<thead>
<tr>
<th>Item Name</th>
<th>Part Number</th>
<th>Qty</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CARB</td>
<td>47501</td>
<td>1</td>
<td>Carb Reagent, 250 Tests/Box</td>
</tr>
<tr>
<td>CEA</td>
<td>47502</td>
<td>2</td>
<td>CEA Reagent, 500 Tests/Box</td>
</tr>
<tr>
<td>AAA Battery</td>
<td>99999</td>
<td>2</td>
<td>Battery, Size AAA (1 cs = 6 bx = 72 bats)</td>
</tr>
<tr>
<td>Liquichek-3</td>
<td>B923[22]</td>
<td>1</td>
<td>BioRad, Liquichek, Tri-Level</td>
</tr>
</tbody>
</table>

*Vendor part number, if defined*

*Long description for purchasing dept.*
**Shopping list for purchasing**

### EP Evaluator
Clinical Laboratory -- Kennett Community Hospital

<table>
<thead>
<tr>
<th>Item Name</th>
<th>Part Number</th>
<th>Qty</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CARB</td>
<td>47501</td>
<td>1</td>
<td>Carb Reagent, 250 Tests/Box</td>
</tr>
<tr>
<td>CEA</td>
<td>47502</td>
<td>2</td>
<td>CEA Reagent, 500 Tests/Box</td>
</tr>
<tr>
<td>AAA Battery</td>
<td>99999</td>
<td>2</td>
<td>Battery, Size AAA (1 cs = 6 bx = 72 bats)</td>
</tr>
<tr>
<td>Liquichek-3</td>
<td>B923[22]</td>
<td>1</td>
<td>BioRad, Liquichek, Tri-Level</td>
</tr>
</tbody>
</table>

Vendor part number, if defined

Long description for purchasing dept.
# Simple Inventory System

**Shopping List**

## AAA

<table>
<thead>
<tr>
<th>Part Num</th>
<th>Item Name</th>
<th>Description</th>
<th>Qty</th>
<th>Unit Price</th>
<th>Total Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>47501</td>
<td>CARB</td>
<td>Carb Reagent, 250 Tests/Box</td>
<td>10</td>
<td>$250.00</td>
<td>$2,500.00</td>
</tr>
<tr>
<td>99999</td>
<td>AAA Battery</td>
<td>Battery, Size AAA (1cs=6bx=72bats)</td>
<td>40</td>
<td>$150.00</td>
<td>$6,000.00</td>
</tr>
</tbody>
</table>

**Vendor Total**  $8,500.00

## BBB

<table>
<thead>
<tr>
<th>Part Num</th>
<th>Item Name</th>
<th>Description</th>
<th>Qty</th>
<th>Unit Price</th>
<th>Total Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>47503</td>
<td>CKMB</td>
<td>CKMb reagent, 100 tests / box</td>
<td>20</td>
<td>$300.00</td>
<td>$6,000.00</td>
</tr>
<tr>
<td>47504</td>
<td>CORT</td>
<td>Cortisol reagent, 100 tests / box</td>
<td>30</td>
<td>$250.00</td>
<td>$7,500.00</td>
</tr>
</tbody>
</table>

**Vendor Total**  $13,500.00

**Grand Total**  $22,000.00
Receiving Inventory

- Using the shopping list
  - Print barcode labels

- Receive the Order
  - Attach labels to
    - Each item
    - A “clipboard”
  - Leftover labels = backorders

- Count received items and Add to Inventory
  - Scan the barcodes or
  - Use the shopping list
Tips and Tricks

setting up your SIS system
Navigational Roadmap

• Starting SIS

• Key Screens
  – Setup: connect barcode scanner
  – Items: define inventory items
  – QOH: current inventory status
  – Lists: make lists of items and quantities (e.g., shopping list, count sheet)

• Reports

• Backup and Restore

Demonstrate
Getting started

• Define your items:
  – Compile a list of inventory items,
  – Divide them into groups, and
  – Give them short (<=30 ch) names and part numbers – the labels may need to fit on small boxes
Entering your items: 
Master List of Inventory items

• Group name i.e. Reagents, controls, supplies

• Item name 30 chr.

• Entry of items in Edit Mode
  – Manually
    ▪ INS key adds row above the highlight in same group
    ▪ Enter after last line adds a row
  – Paste from Excel
    ▪ Copy empty form to excel
    ▪ Fill in and copy paste back to SIS

• Edit/ Select Toggle
  – Edit lets you change and update specific items.
  – Select lets you Do specific actions
    ▪ Add to existing list
    ▪ Delete
    ▪ Print barcode labels (non expired)
    ▪ Make active / inactive
    ▪ Copy to the clipboard
<table>
<thead>
<tr>
<th>ItemGroup</th>
<th>ItemName</th>
<th>CountSheet No</th>
<th>PartNo</th>
<th>HasLots</th>
<th>MinQty</th>
<th>MaxQty</th>
<th>StandingQty</th>
<th>Divisor</th>
<th>Active</th>
<th>Location</th>
<th>Vendor</th>
<th>Vendor Part No</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eximer Reagents</td>
<td>CARB</td>
<td>1</td>
<td>47501</td>
<td>Yes</td>
<td>4</td>
<td>10</td>
<td>10</td>
<td>1</td>
<td>Yes</td>
<td>Rm A Bin 9</td>
<td>AAA</td>
<td>AAA</td>
<td>Carb Reagent, 250 Tests/Box</td>
</tr>
<tr>
<td>Eximer Reagents</td>
<td>CEA</td>
<td>1</td>
<td>47502</td>
<td>No</td>
<td>2</td>
<td>10</td>
<td>20</td>
<td>1</td>
<td>Yes</td>
<td>Rm A Bin 2</td>
<td>AAA</td>
<td>AAA</td>
<td>CEA Reagent, 100 Tests/Box</td>
</tr>
<tr>
<td>Eximer Reagents</td>
<td>CKMB</td>
<td>1</td>
<td>47503</td>
<td>No</td>
<td>3</td>
<td>10</td>
<td>1</td>
<td>1</td>
<td>Yes</td>
<td>Rm A Bin 3</td>
<td>BBB</td>
<td>BBB</td>
<td>CKmb reagent, 100 tests / box</td>
</tr>
<tr>
<td>Eximer Reagents</td>
<td>CORT</td>
<td>1</td>
<td>47504</td>
<td>No</td>
<td>4</td>
<td>10</td>
<td>1</td>
<td>1</td>
<td>Yes</td>
<td>BBB</td>
<td>BBB</td>
<td>BBB</td>
<td>Cortisol reagent, 100 tests / box</td>
</tr>
<tr>
<td>Eximer Controls</td>
<td>Liquichek-3</td>
<td>2</td>
<td>47524</td>
<td>Yes</td>
<td>5</td>
<td>10</td>
<td>1</td>
<td>1</td>
<td>Yes</td>
<td>Freezer</td>
<td>AAA</td>
<td>B923[22]</td>
<td>Liquid control, Tri-Level, 6 bottles / box (2 of each level)</td>
</tr>
<tr>
<td>Eximer Supplies</td>
<td>AAA Battery</td>
<td>2</td>
<td>99999</td>
<td>No</td>
<td>1</td>
<td>3</td>
<td>30</td>
<td>1</td>
<td>Yes</td>
<td>AAA</td>
<td>AAA</td>
<td></td>
<td>Battery, Size AAA (1cs=6bx=72bats)</td>
</tr>
</tbody>
</table>
Defining items

• Item Naming Examples
  – Good: CARB (name) Eximer Reagents (group)
  – Bad (out of the catalog): Closure, Safety, Tainer Top, LAVENDER 10bags 10,000/cse [ 02-706-14 ]

• 30 char NAME, 16 char P/N - alphanumeric

• Longer Description names and (vendor) part numbers print on the Shopping list for purchasing. You can start with $ price. (EE11.2 will have a separate price column)

• When all items are defined:
  – do an initial physical inventory
  – print barcode labels for existing stock
Bar Codes with Lot Numbers

- Option on the print menu to include lot numbers
Items set up Tips

• Create all group names first.
  – Add one part number to each group
  – put items in the category (group) order you want to see on the count sheets.
  – Organize alphabetically or
  – Organize by group name with the lowest sequence number, and then by sequence number. You can change the sequence number using the up/down arrows at the bottom of the screen.
    ▪ Group name lowest reaq number
      • Item names in sequence order within the group.
      ▪ Then group name with next lowest sequence number.
More Features

• Items screen
  – Sort by “Has lots” column
  – 30 character names
  – create shopping lists and count sheets from the QOH screen
  – Set Sequence Order utility
    ▪ Arrange items in groups,
    ▪ Change the group name for all items assigned to it,
    ▪ Move items from one group to another.
    ▪ tied to the security permission of "modify inventory items" which is only assigned to Administrators by default.

• QOH screen
  – produce a QOH report using a subset of selected items on the QOH screen.

• Shopping lists
  – The Shopping List Report includes Lot Number and Expiration Date columns.
  – non-expired lot numbers are shown on a separate report line
  – items with lots has a line with a blank lot number so users can write in a new lot number.
EE9.4 and higher

- **Barcode labels**
  - All of the Items in the Shopping list can have barcodes printed, with multiple barcodes printing for items with more than one non-expired lot.
  - No barcodes print for expired lots.

- **The File\Transaction Viewer shows the user login name who made a change, and which lot number**

- **Adding new lots**
  - Items screen: Add a new line in the items screen lot number popup by pressing enter on the last line
  - Shopping list: Right click in the lot number field on a shopping list when new inventory is received.
  - Cannot enter in count sheet

- **Utilities menu:**
  - 'Database Check' reveals potential setup problems on the Items screen that may result in some items missing on reports.
  - error count is displayed at the bottom of the Items screen, indicating that the DB Checker should be reviewed for errors.
First Time Physical Inventory: Using count sheets created in QOH screen

• Create Master items list
• Switch to QOH
• Select All and “With Selected items Do”:
  – Set inventory to zero
• Create a new count list 2 ways in QOH screen
  – Dropdown list for selected items or
  – Icon toolbar “Lists”: Make count sheets
• Count sheets include all active items.
  – A count list created from Master items gives you blank quantities for first time inventories
  – A count list created from the LISTS menu gives you current quantities and space to write in corrected quantities
Logistics

• Where to put the barcode label
  – On the box?
  – On the storeroom shelf?
  – Have a clipboard of labels in the storeroom?

• Do you want to count fractional boxes (“bottles”) or whole boxes?
  – Check the box for “divisor” when subtracting bottles
  – Don’t check when adding Whole boxes to inventory

• Do you want to keep track of lot numbers? Date received? Locations?

• You need a printer (preferably a laser printer) for printing bar code labels
Security Options

1. Each department can have its own DB And its own security
   1. Administrators – sets everything up
   2. Operators – day to day users
   3. Guests – Can look but not touch

2. Administrators: Add a new user(s) to serve as administrator.
   1. Each database MUST have at least one administrator. WE recommend two.
   2. Edit the default “admin” user and uncheck the Enabled box.
      1. It won’t be visible when it is disabled, but it will still be in the system.
      2. Do not delete admin or change its user name or administrative functions.
      3. By leaving the disabled admin account in the system, you can regain access to your database
         with a call to Data Innovations support if all your administrators lose (forget) their login
         information. (or get hit by a bus)

3. Delete the “operator” account.
   1. Add a new account for each user who will enter inventory transactions.

4. Leave the guest account as-is.
   1. Anyone can log in as guest, with no password, and see the data, but he/she can’t edit it.
Case Study – SIS improved efficiency

- The Chemistry department of a 150 Bed Hospital in the Bay area implemented SIS with bar code scanner within the last year.

Formerly:

- They were recording purchases and disbursements using sticky notes and MS Excel.
- Frequent stock outs and AdHoc ordering of supplies
- Doing physical inventory weekly.
- Time consuming and tedious tasks
Case Study: NOW

- Staff can easily use the scanner to decrement stock.
- Physical inventory now done less than once per month
- Shopping lists manage ordering to planned events. – no emergency Ad Hoc ordering
- Inventory Tracking chores for this department have been cut in half both in lab and in materials management
Starter Kit

• You may purchase an Inventory Starter Kit from Data Innovations for $450

• Includes three Symbol CS1504 bar code scanners and a 100-sheet box of Avery 8460 Labels

• P/N: EE-G-BAR-SK01
Lists

• Create from selections in Item Screen or QOH screen
  – Select all, or make custom lists.

• From the QOH screen
  – Create a new list, ie. Count list, shopping list
  – Default quantities shown are suggested order quantities.

• From the item screen.
  – create a customized count sheet list only from item screen.
  – Default quantities are blank
FAQs

• How do I handle partial orders received.
  – Duplicate your shopping list and delete those items received. Use the new list to manage items as they trickle in.

• My purchasing dept needs cost info. What do I do.
  – Consider putting your cost info at the beginning of the full description line. EE11.2 will have cost info.

• I want to put the same items in different locations.
  – Consider calling a different location a different lot #

• Vendor makes frequent part number changes.
  – Add the new part numbers as soon as you know about it.
  – Don’t be in a hurry to inactivate the old P/N.
    ▪ Will old stock be scrapped?
For more Information

• EE User’s Guide chapter 33
• Context sensitive HELP
Questions and Discussion

ee.datainnovations.com

802-658-1955