User Guide

BTRP - Inventory Management System

BTRP - Biological Threat Reduction Program

Inventory Management System

Prepared by Apphia Solutions, LLC

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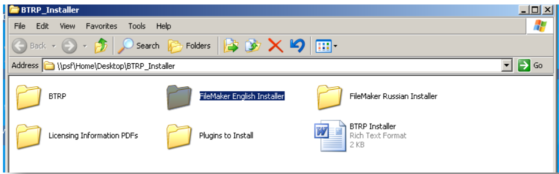
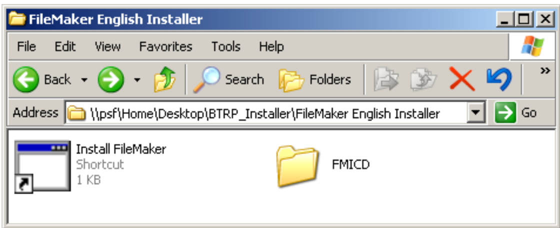
1 Installation

FileMaker Pro Installation





1. In **BTRP_Installer**, open the *FileMaker English Installer* folder.

2. Double click on **Install FileMaker.**

3. Follow installation instructions. When prompted for language, click OK for English.

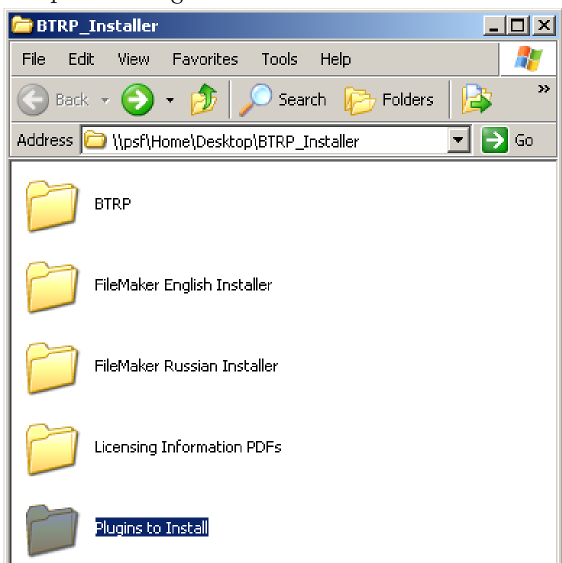
Organization Name for installation:
Bechtel National, Inc.

License Key:

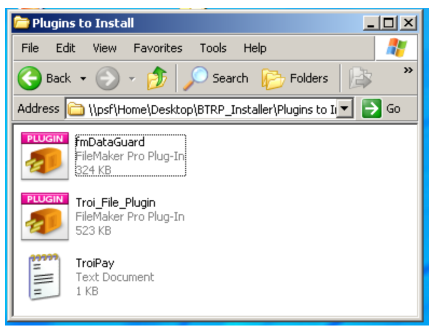
32T8M-43331-49V99-X4TJ2-7J3JM-9NM86-54941

Install Plug-ins

1. Open the *Plugins to Install* folder.

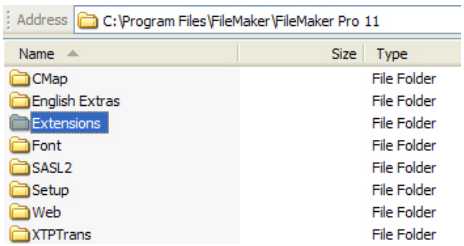


The contents of this folder are shown below:



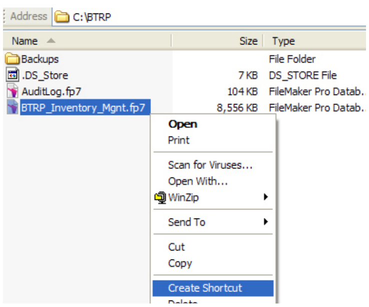
2. Copy the file **Troi.Pay.txt** to the *C:\Program Files/FileMaker/FileMaker Pro 11* folder.

3. Copy **fmDataGuard.fmx** and **Troi_File_Plugin.fmx** to *C:\Program Files/FileMaker/FileMaker Pro 11/Extensions.*



Install BTRP Program

1. Copy *BTRP* folder to root of C: drive, and, if desired, create a short cut of **BTRP_Inventory_Mgnt.fp7** and place it on your desktop.



First Launch

1. Open **BTRP_Inventory_Mgnt.fp7** from the *C:/BTRP* folder, or from desktop shortcut.

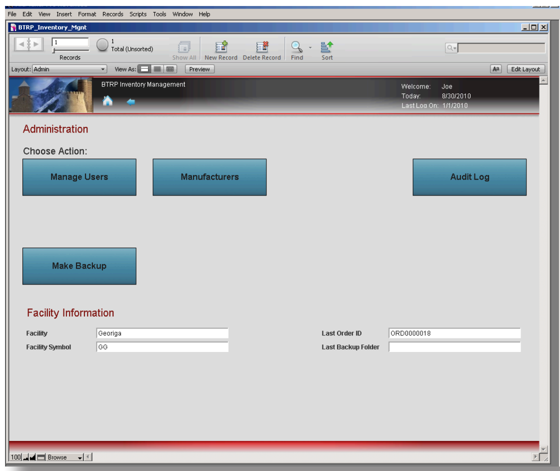
2. When launching the system for the first time, you will be required to log on as an Admin user using the following:

   Logon: Admin **Password:** password

3. After the initial log on, change your username and password by selecting *Change Password* from the **File** menu, and following the prompts.

4. In the *Admin* section, you should create two accounts for yourself: one *Material Coordinator* account and one *Lab Tech* account. See *Manage Users: New User* for instructions.

5. In the *Admin* tab, enter your Facility name and Facility Symbol in the appropriate fields.



Import Inventory

1. From the Admin section, select *Import Inventory*. You will be prompted for Master Catalog file containing your facility's inventory. This will be an .xls file.

2. Locate your file in the dialog box and select OK. The file will be imported to the current inventory, and the master stock catalog will be created.

2 General System Information

Backups

A backup will automatically occur when the program is closed: a script will run and create a folder with the current date and time.

To force a backup: in the *Admin* section, click the *Make Backup* button. A sub-folder will be created within the *Backups* folder (C:\BTRP/Backups) labeled with the date and time of the backup.

Individual back-up folders can be copied to CD or DVD by selecting the folder or folders of interest using your CD/DVD burning software of choice.

Recovery

If a file will not open, or needs to be recovered:

1. Open C:\BTRP.

2. Select *File>New>Folder* from the drop-down menu.

3. Cut the *BTRP_Inventory_Mgnt.fp7* and *Audit-Log.fp7* and paste them into the new folder. It is important to keep the last set of files in case the data is needed at a later time.

4. Rename the folder, with "Damaged file" and the current date in the folder name.

5. Navigate to C:\BTRP/Backups and locate the most recent backup folder.

6. Launch the copy of *BTRP_Inventory_Mgnt.fp7* within the back-up folder, and confirm that version is acceptable. If the version is not acceptable, continue moving backwards through backups until a replacement is identified.

7. Once a back-up folder has been targeted, copy both files from the folder and return to C:\BTRP.

8. Paste both files into C:\BTRP.

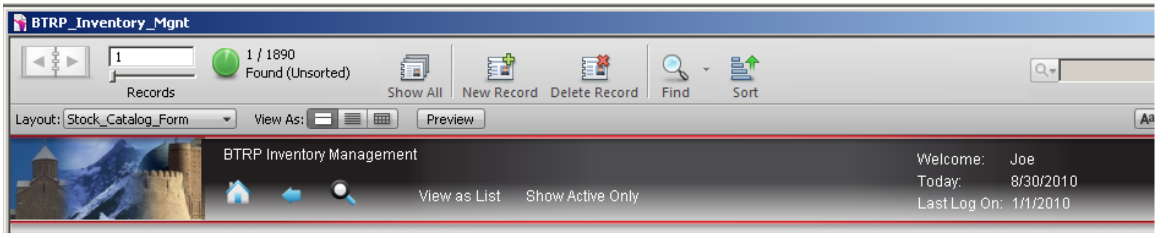
9. Launch the new copy of *BTRP_Inventory_Mgnt.fp7* and resume work.

If a file is corrupt and will not open, but you need the data from that file, contact a FileMaker developer for assistance.

Languages

The program will automatically switch between English and Russian language layouts based on user settings. The program should be run in the appropriate language, so the FileMaker menus correspond to the language of the layouts.

Navigation Bar



The navigation bar, pictured above, is available from all screens. The upper half includes (from left to right):

Book icon: Allows step-wise navigation through current set of records.

Slide bar: Allows rapid scrolling through current set of records.

Green circle: Toggles between Found and Omitted records.

Show All: Displays all records in current table.

New Record: Creates a new record; only active when logged in as full Administrator.

Delete Record: Deletes current record; only active when logged in as full Administrator.

Note: Some layouts will show a single record; this record is required, and it will never increase, it cannot be deleted.

Find: Launches Find mode.

Sort: Launches Sort dialog box.

Magnifying glass: Entering text into the adjacent field and then clicking the magnifying glass will launch Quick-find, which searches all visible fields in the layout for the specified criteria.

The lower half includes (from left to right):

House icon: Returns you to the dashboard.

Back arrow: Moves you back step-wise through previously visited layouts; terminates at dashboard.

Magnifying glass: Another method for launching Find mode.

Performing Searches

From Find mode, you may search by entering criteria in any or all relevant fields. The following syntaxes and symbols may be used to improve search accuracy:

*** :** Finds any records with non-blank entries in the given field

*** [*criteria*]:** Finds any records containing the criteria; allows partial searches of a field

= : Finds all records containing the exact criteria specified; must contain complete phrase or entry

6/10/2010: Finds all records from June 10, 2010

6/2010: Finds all records from June 2010

2010: Finds all records from 2010

3 System Screens and Usage

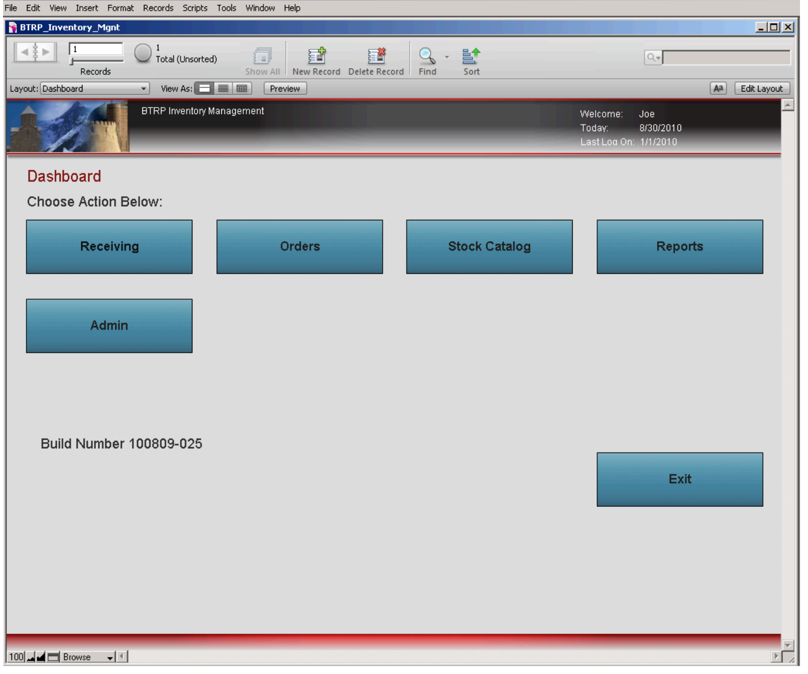
General

The following pages describe the usage, access, and purpose of each section within the system.

Dashboard

Purpose: Main navigational screen for system

Access: All users; access to buttons within will be restricted according to current user privileges



Description

Receiving: Receive and update new and existing stock items.

Orders: View, submit, or print current and past orders.

Stock catalog: View current levels of and detailed information about all approved stock items for your location.

Reports: Multi-level reporting tools.

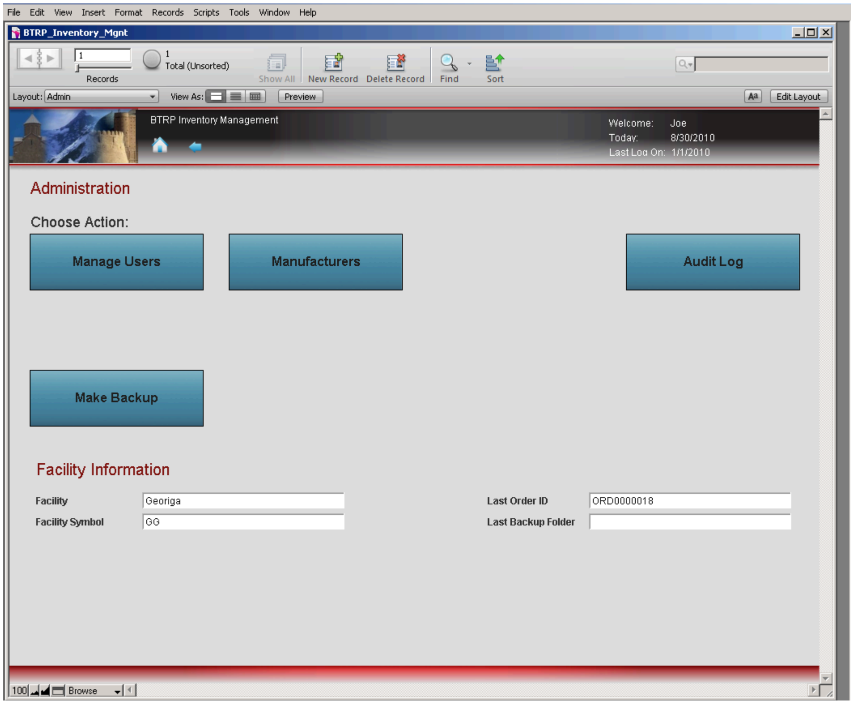
Admin: Manage user settings, create backups, view audit logs, and update inventory and manufacturer info.

Exit: Creates a backup and quits FileMaker.

Administration

Access: Administrator only

Path: Dashboard > Admin



Description

The Administration section allows full access users and Material Coordinators to manage the system:

Manage Users: Add, edit, and disable users.

Manufacturers: Add, edit, and change manufacturer details

Audit Log: View all data changes.

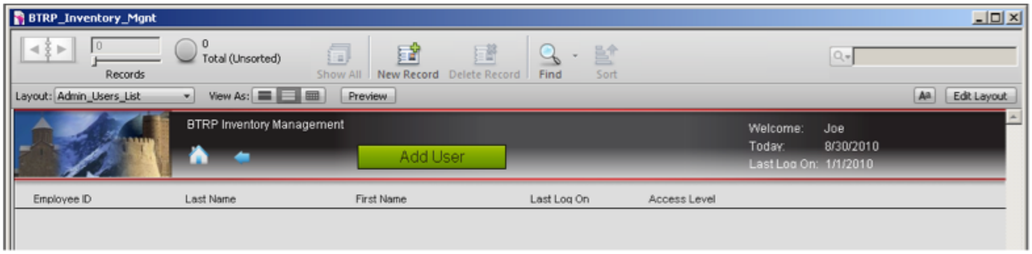
Make Backup: Force a backup to the Backups folder.

Facility Information: Enter facility information for orders; **Facility Symbol** is part of the order number.

Manage Users

Access: Admin Only

Path: Dashboard > Admin > Manage Users



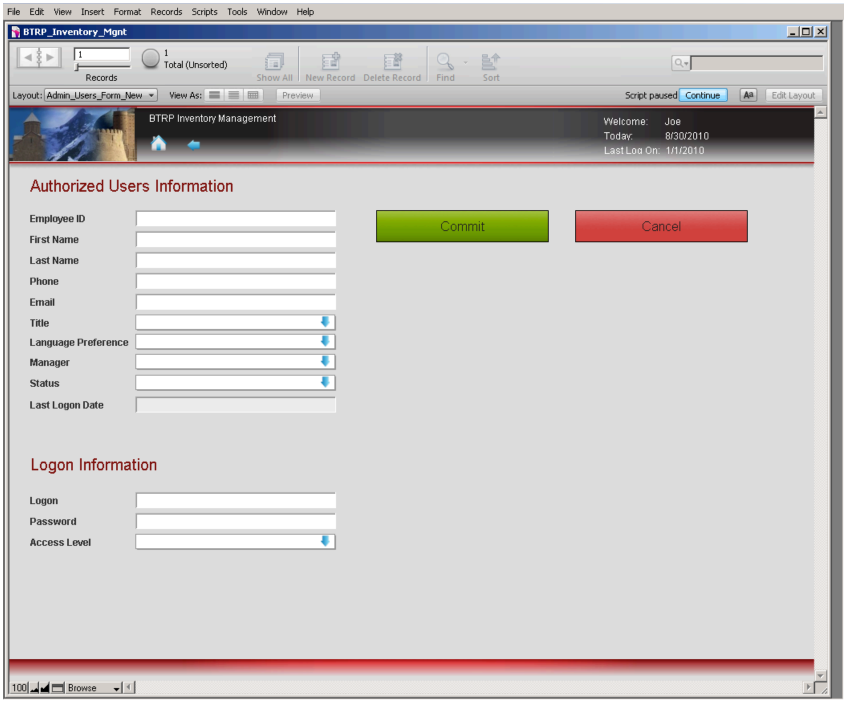
Description

This section allows for setup and maintenance of user accounts. From this section you may manage existing accounts, or add new users.

The status, logon, password, and access levels for a user are all tied to FileMaker's native security settings. Modifications to a user's profile in this section will impact the inherent security restrictions for that user.

Adding a User

Path: Dashboard > Admin > Manage Users > Add User



Description

New users can be added through this portal. Required information includes:

Status: Determines user logon permission: user status must be set to *Active* in order to log on.

Logon: The username assigned to the user.

Password: The password assigned to the user.

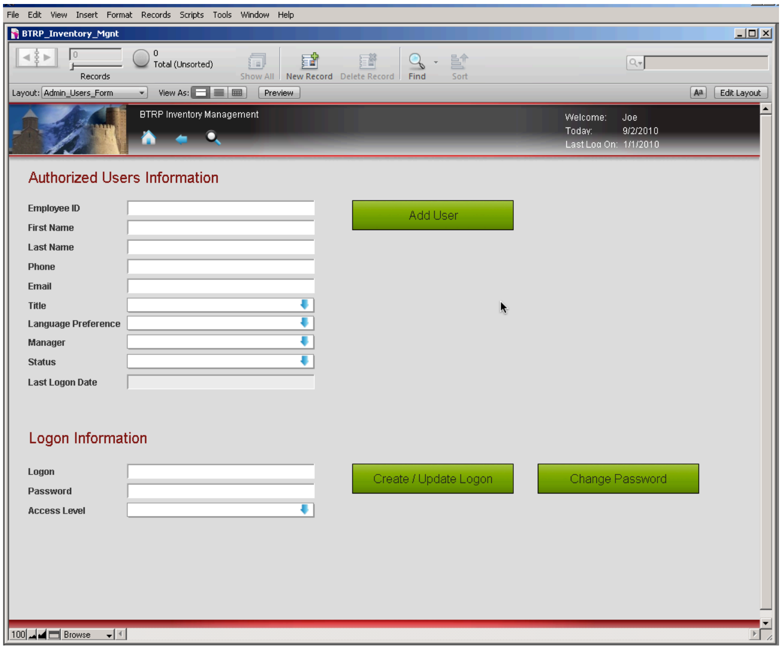
Access Level: Determines which sections a user can access; setting this parameter activates the user account.

Clicking the **Commit** button will save the user's record and return you to the *Manage Users* list.

Clicking **Cancel** will clear the current record without saving, and return you to the *Manage Users* list.

Editing a User

Path: Dashboard > Admin > Manage Users



Description

Changes can be made to the accounts of existing users through this portal.

At the initial screen of the *Manage Users* area, all existing users will be displayed in a list. Clicking on a user will take you to that record. If no users have been entered, the list will be blank (see *Add Users*).

After selecting the user to be edited:

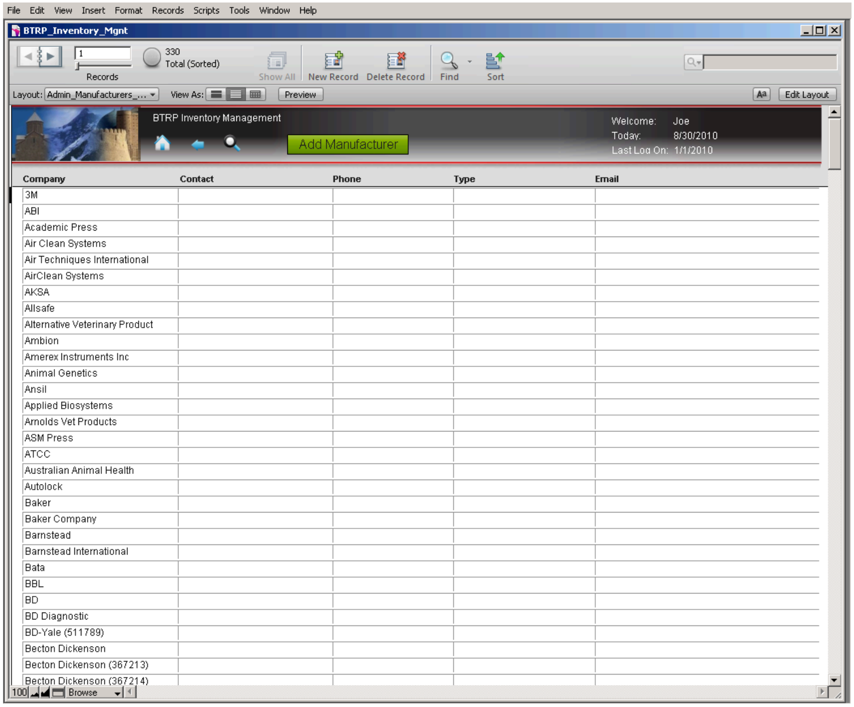
If changing password only: Edit password and then press **Change Password**. This updates FileMaker's security settings with the new password.

For all other changes: Make desired changes to entries. Once all changes are complete, press **Create/Update Logon**. This updates FileMaker's security settings according to changes made.

Manufacturers

Access: Admin Only

Path: Dashboard > Admin > Manufacturers

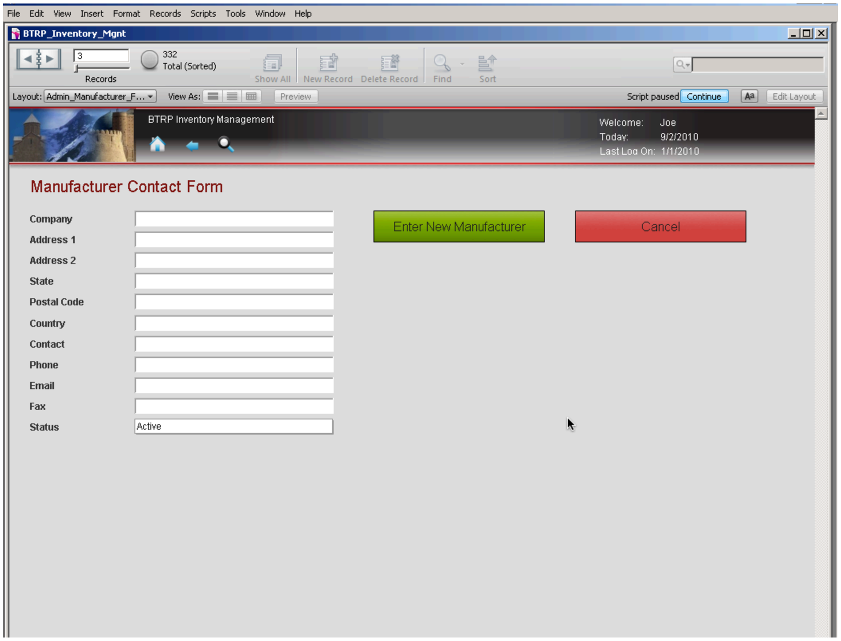


Description

Existing manufacturers are displayed in a list on the main screen of the *Manufacturers* section. From here, you may navigate to a specific entry to view and edit the contents, or you may add a new manufacturer to the list.

Adding/Editing a Manufacturer

Path: Dashboard > Admin > Manufacturer



Description

From the main Manufacturer screen,

To add a new manufacturer to the list:

Click on the **Add Manufacturer** button. Enter manufacturer details as specified in the fields as shown in the image above.

When additions are complete, press **Enter New Manufacturer** to save entry.

To edit an existing manufacturer:

Select the manufacturer's entry in the list. Modify entry as necessary.

When changes are complete, press **Commit** to save entry.

Notes:

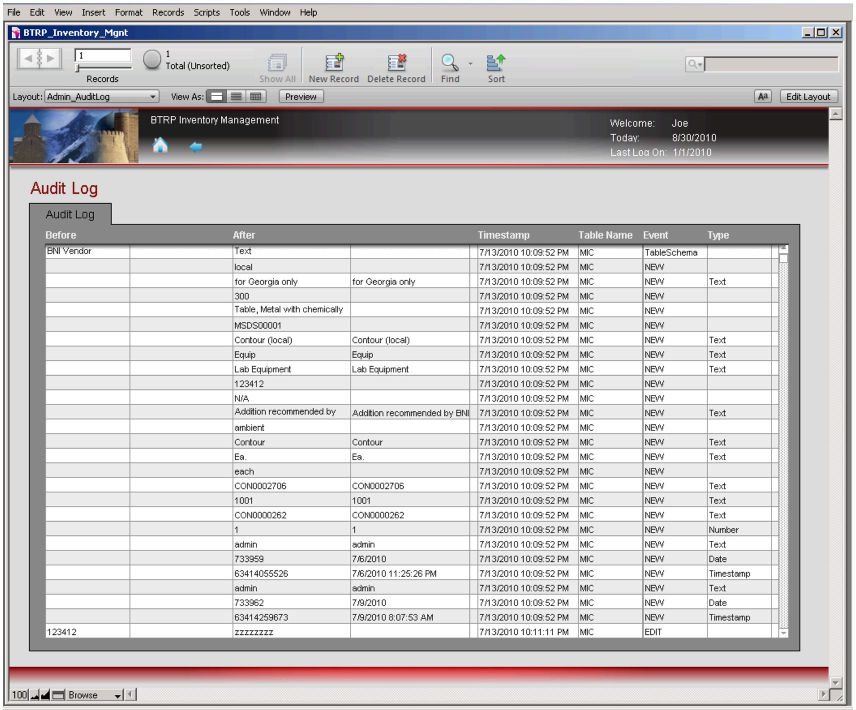
Clicking the **Cancel** button will delete the current record without saving, and return you to the Manufacturer's list.

The **Status** field indicates whether a manufacturer is currently being used. Setting the status to *Inactive* for a particular entry indicates that you are no longer using that manufacturer.

Audit Log

Access: Admin Only

Path: Dashboard > Admin > Audit Log



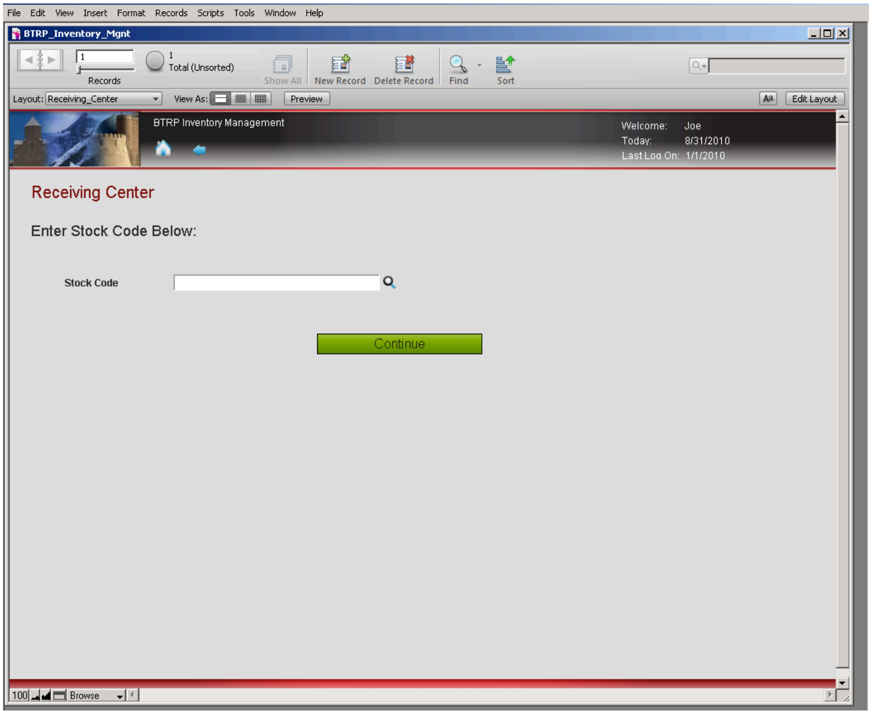
Description

The *Audit Log* shows a list of all changes made in the system. All changes made to data entries are tracked in this section.

Field values prior to and after changes are listed, as well as the time and date of the change, and the name of the user responsible for a given change.

Receiving Center

Path: Dashboard > Receiving



Description

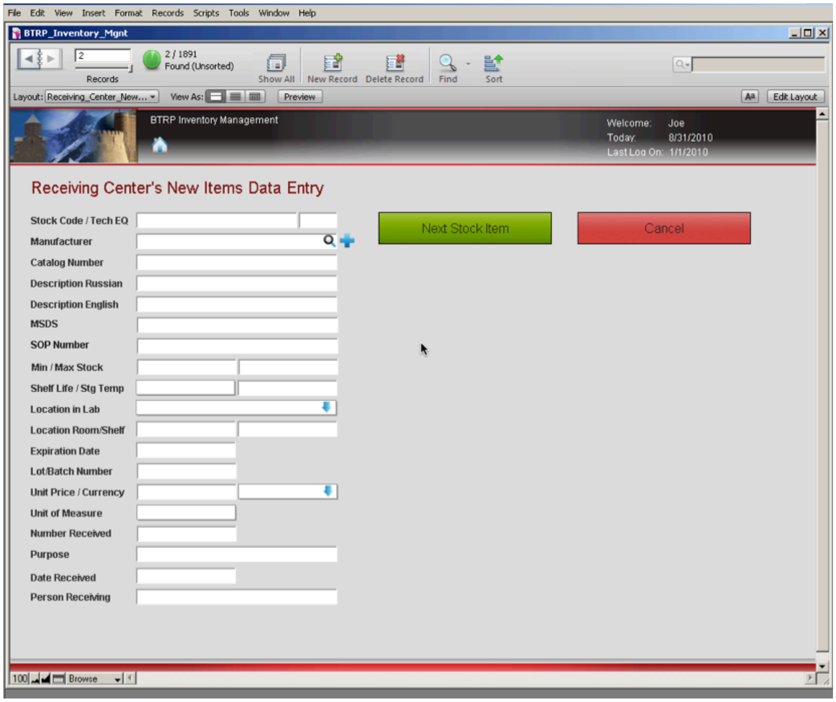
Use this section to enter information about stock items that have been received. New items may be added to stock, and existing items can be restocked. Changes made in this section are reflected in the Master Stock Catalog.

To enter a new item into inventory:
1. Click **Continue**, and select **Create New** when prompted.

To modify an existing item:
1. Click **Continue** without entering any text, and select **Re-Enter** when prompted; or
2. Click the magnifying glass without entering any text, and then select item from list; or
3. Enter the Stock Code in the field and click **Continue.**

New Stock Items

Path: Dashboard > Receiving



Description

Enter item information as required for each field.

Manufacturer: Add a new manufacturer by clicking the blue **+** symbol next to the manufacturer field. You may choose an existing manufacturer from the list by clicking the magnifying glass.

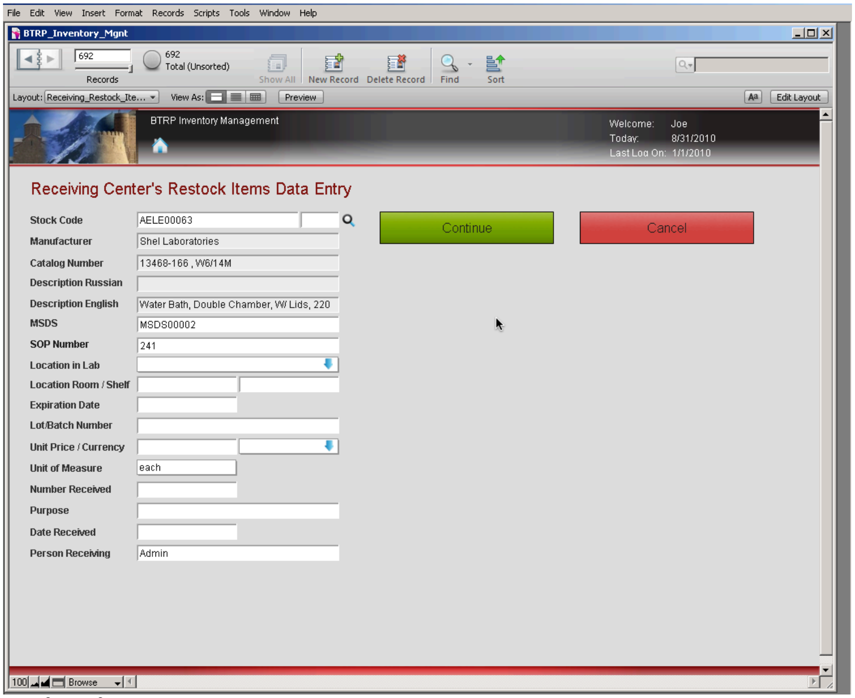
Next Stock Item: Saves the entry and returns you to the Receiving Center.

Cancel: Cancels the entire transaction without saving and returns you to the Receiving Center.

Entries created in this section will add a new item to the inventory and create a new entry in the master Stock Catalog.

Restock Items

Path: Dashboard > Receiving



Description

Update item information as necessary. Note that some fields are locked in this section and if editing is required should be modified through the Master Stock Catalog.

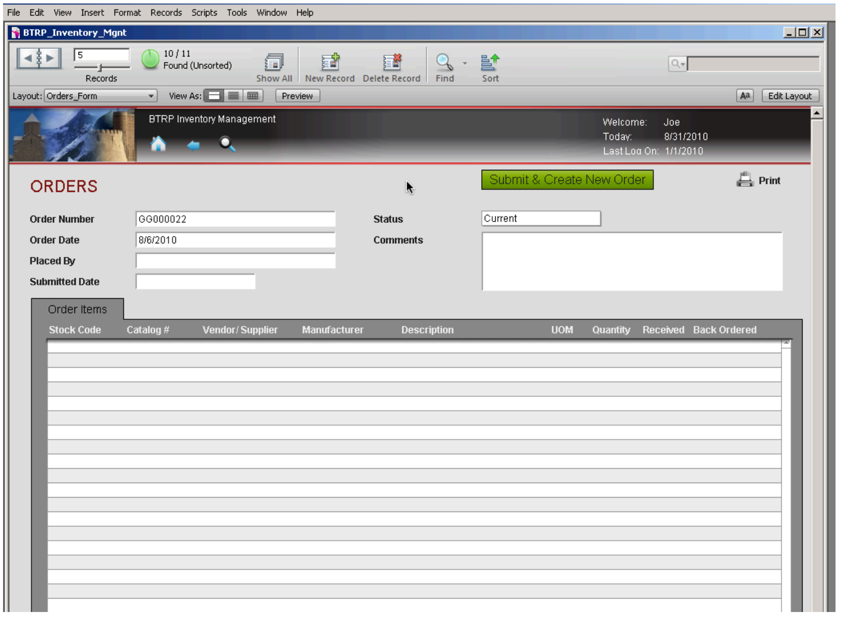
Continue: will save your modifications and return you to the Receiving Center.

Cancel: will cancel the entire transaction without saving and return you to the Receiving Center.

Entries created in this section will add a new item to the inventory and create an entry in the Master Stock Catalog.

Orders

Path: Dashboard >Orders



Description

Use this section to search for past orders or create a new order. The current order is displayed by default. The *Back Ordered* column lists the date that the item was back-ordered.

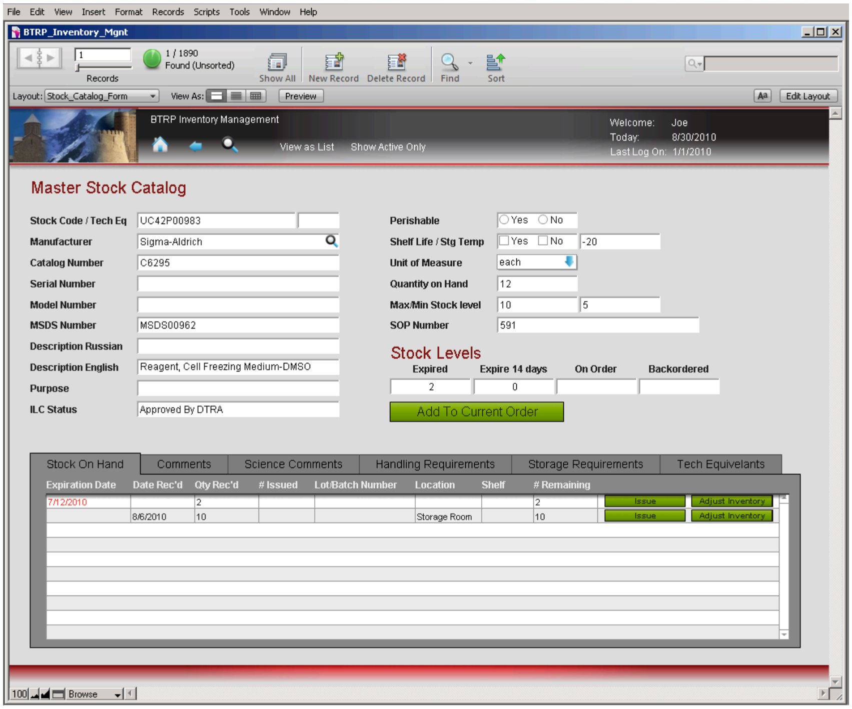
To create a new order:

1. Press the **Submit & Create New Order** button to clear the current order from the screen. Pressing this button changes the status to *Active*, and updates the Order Date to the current date. It also updates the last order number in the Admin section, so all subsequent items will be placed on the next order.
2. When the new order appears (the Order Number and Order Date are automatically populated), fill in blank fields. Items appear on order based on activity in the Stock Catalog.
3. When ready to submit, update the Submitted Date field with the current date, and press **Submit & Create New Order.**
4. When an item is received, it can be manually checked off, or it will automatically be marked as *Received* when it is entered during the receiving process.
5. Pressing **Print** will print the current order, or create .xls and .pdf versions for export.

Stock Catalog

Access: Material Coordinator only

Path: Dashboard > Stock Catalog

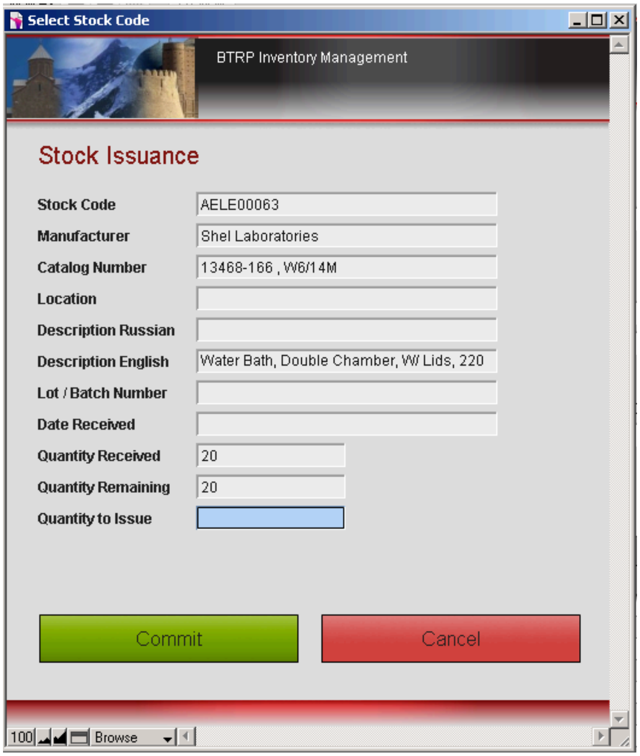


Description

The Stock Catalog lists all approved items for your location. In this section, you can view and edit item details, view current stock levels for a specific item, issue stock, and adjust inventory. You may also manually add items from the Stock Catalog to the current order.

Issue Stock

Path: Dashboard > Stock Catalog > Stock On Hand (tab) > Issue



Description

Stock can only be issued for items that have a non-blank value in the *Quantity on Hand* field.

To issue stock, enter the number of items to be issued in the *Quantity to Issue* field. This number may not exceed the *Quantity Remaining*.

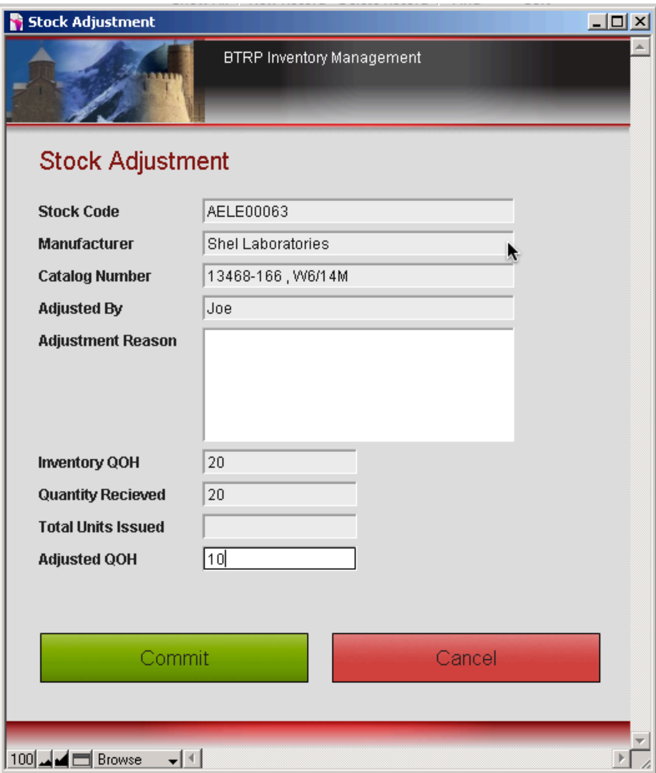
Press **Commit** to issue stock and save changes.

Press **Cancel** to return to the Stock Catalog without saving.

If stock falls below the minimum level, the item will automatically be added to the current order. If no min/max values are assigned, or if the item is already on an order, then the item will not be automatically added.

Adjust Inventory

Path: Dashboard > Stock Catalog > Stock On Hand (tab) > Adjust Inventory



Description

Inventory can only be adjusted for items that have a non-blank value in the *Quantity on Hand* field.

To adjust inventory:

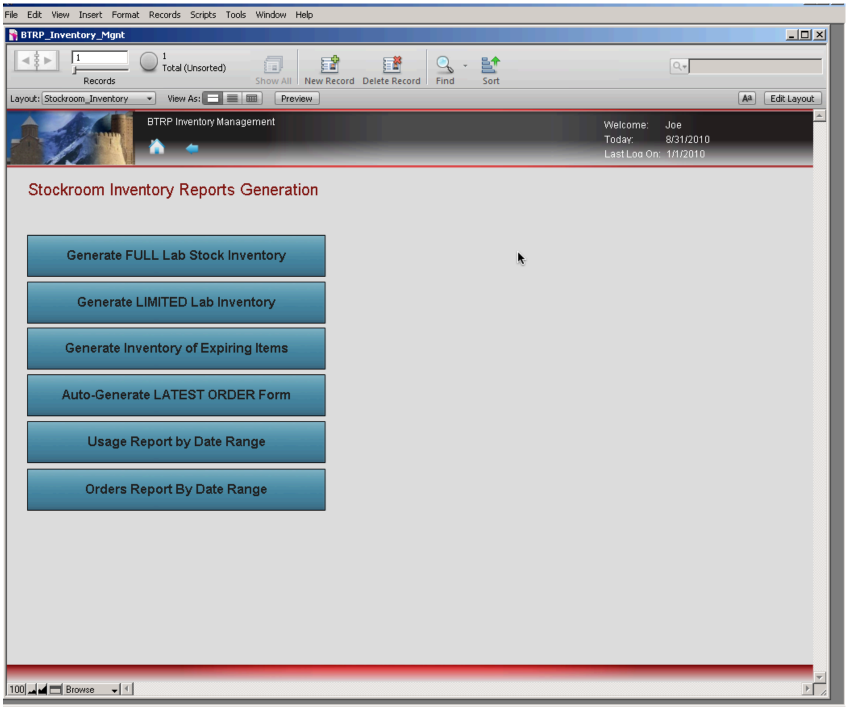
1. Enter the reason for adjustment.
2. Enter the updated Quantity on Hand in the *Adjusted QOH* field.

Press **Commit** to adjust QOH and save changes.

Press **Cancel** to return to the Stock Catalog without saving.

Reports Generation

Path: Dashboard > Reports



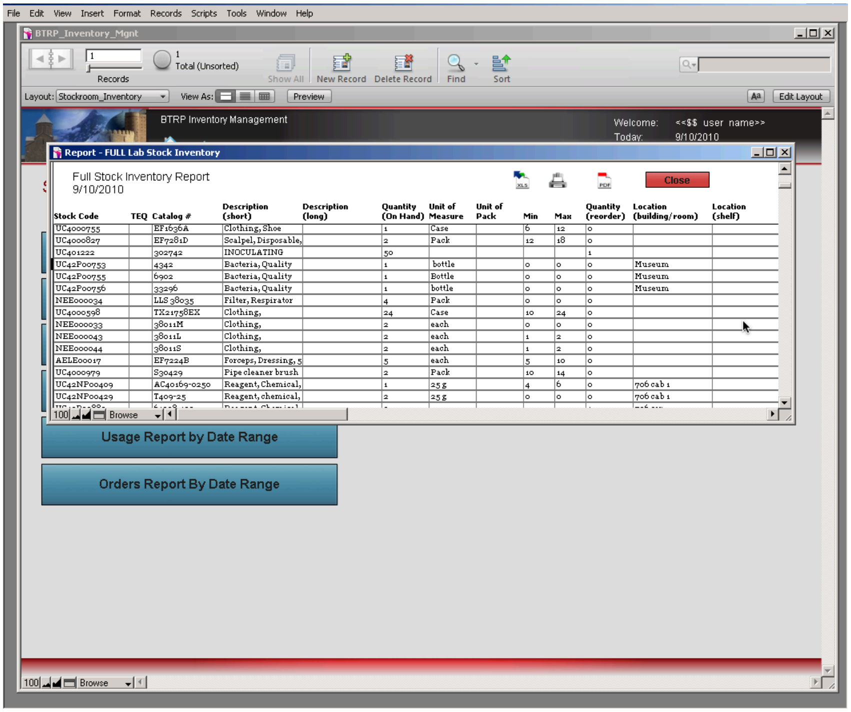
Description

Use this section to generate reports on current stockroom inventory as PDF or Excel files.

Within each report mode, to search for results within a report in FileMaker, click on **Browse** at the bottom of the report panel and select *Find* from the pop-up menu. Enter search criteria in the field(s) of interest and press the Enter key to generate search results.

Generating Full Lab Stock Inventory Report

Path: Dashboard > Reports > Generate FULL Lab Stock Inventory



Description

Use this function to generate a list of all stock items on hand. It will return all items with non-blank values in the *Quantity on Hand* field.

When the list displays, in the upper right-hand corner, select the:

XLS icon: to generate an Excel (.xls) report,

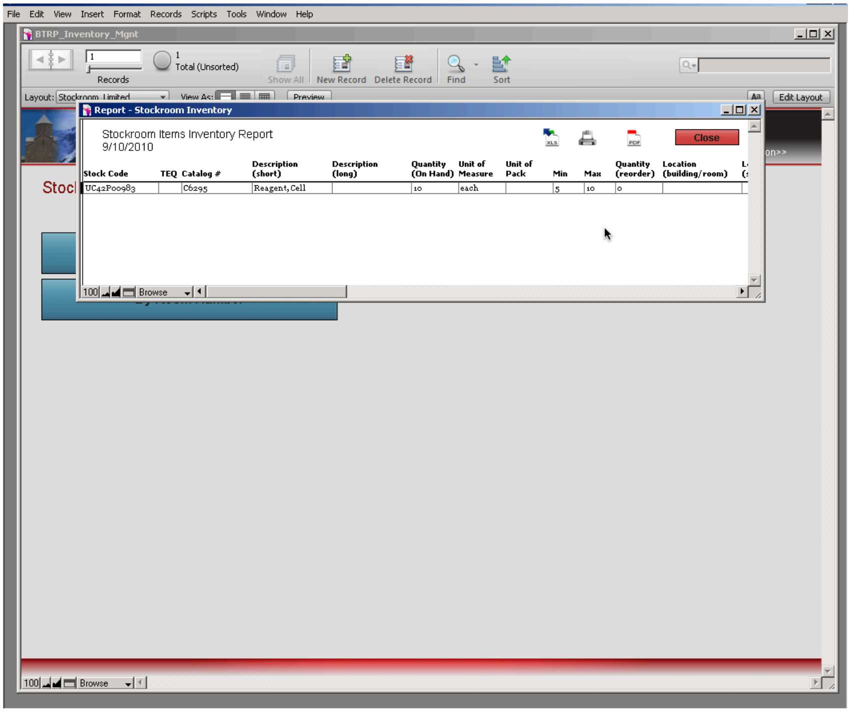
PDF icon: to generate a .pdf report,

Print icon: to print a copy of the report.

To close the report and return to the Reports main screen, press the **Close** button.

Generate Limited Lab Stockroom Items Report

Path: Dashboard > Reports > Generate LIMITED Lab Inventory



Description

To produce a list of all stock items that are in a storage room, select **Stockroom Items.**

To produce a list of all stock items that are in a storage room and are sorted by room number, select **By Room Number.**

When the list displays, in the upper right-hand corner, select the:

XLS icon: to generate an Excel (.xls) report,

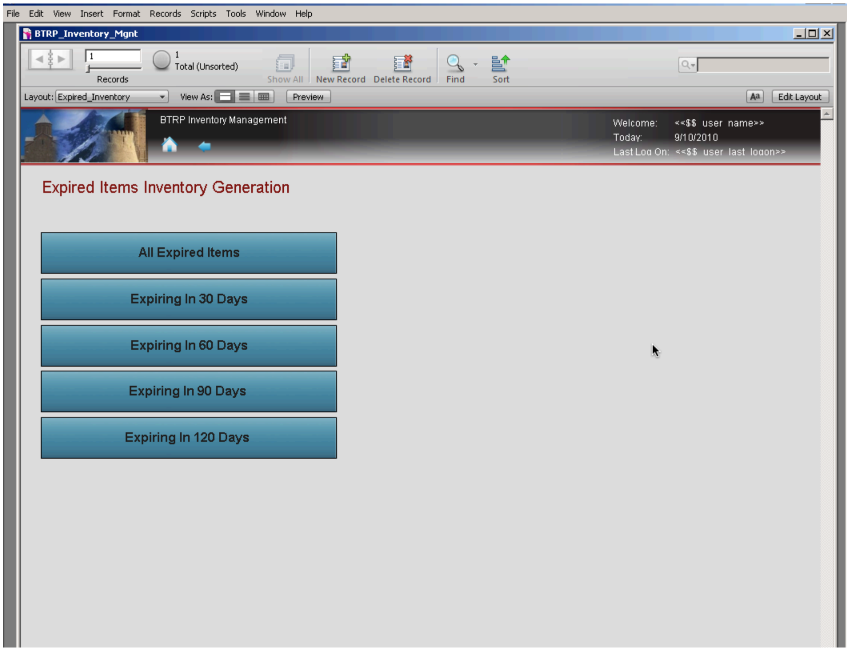
PDF icon: to generate a .pdf report,

Print icon: to print a copy of the report.

To close the report and return to the Reports main screen, press the **Close** button.

Generating a List of Expiring Items

Path: Dashboard > Reports > Generate Inventory of Expiring Items



Description

Use this function to generate reports of expired or expiring items:

All Expired Items: Produces a list of all stock on hand that has expired.

Expiring in XX Days: Produces a list of all stock on hand that will expire within the specified time period.

When the list displays, in the upper right-hand corner, select the:

XLS icon: to generate an Excel (.xls) report,

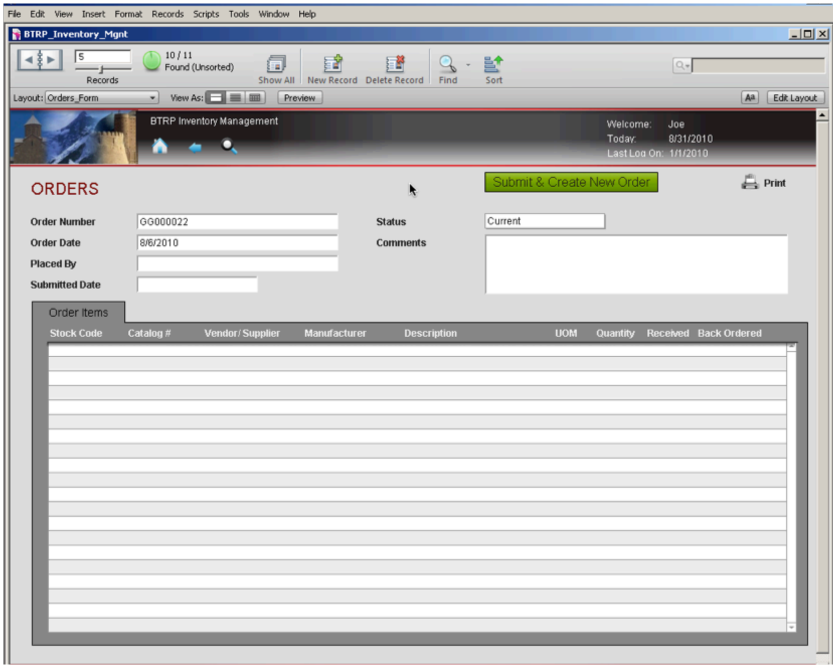
PDF icon: to generate a .pdf report,

Print icon: to print a copy of the report.

To close the report and return to the Reports main screen, press the **Close** button.

Auto-Generating Latest Order

Path: Dashboard > Reports > Auto-Generate LATEST ORDER Form

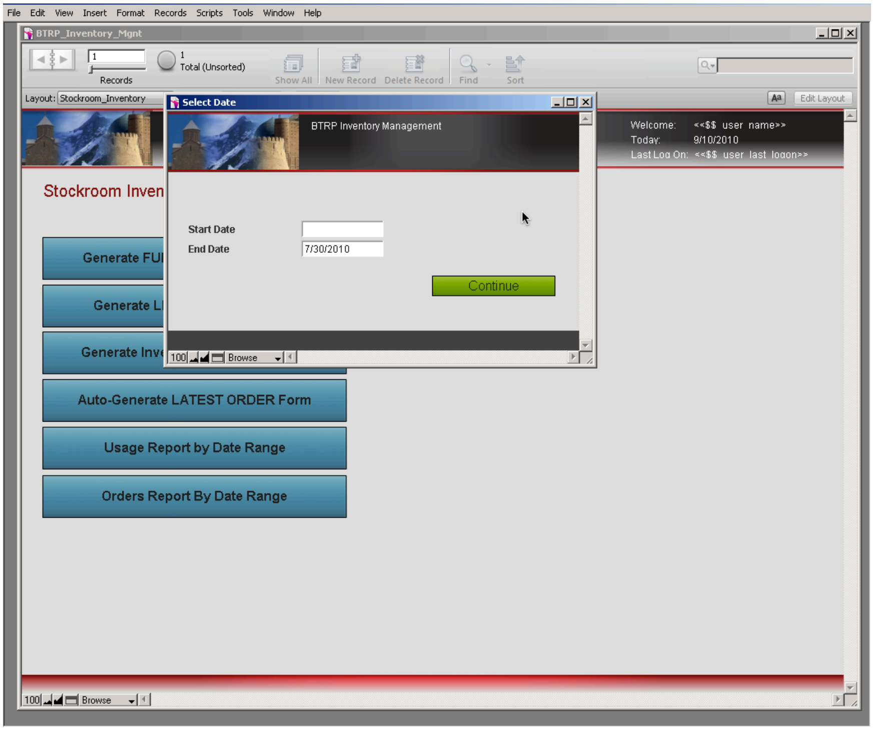


Description

Finds all stock that is below specified minimum levels and not on a current order and adds them to the current order.

Generating Usage Report by Date Range

Path: Dashboard > Reports > Usage Report by Date Range



Description

Use this section to generate a list of items that were issued during the specified time period.

Enter the dates for the period of interest in the pop-up window and press **Continue**.

When the list displays, in the upper right-hand corner, select the:

XLS icon: to generate an Excel (.xls) report,

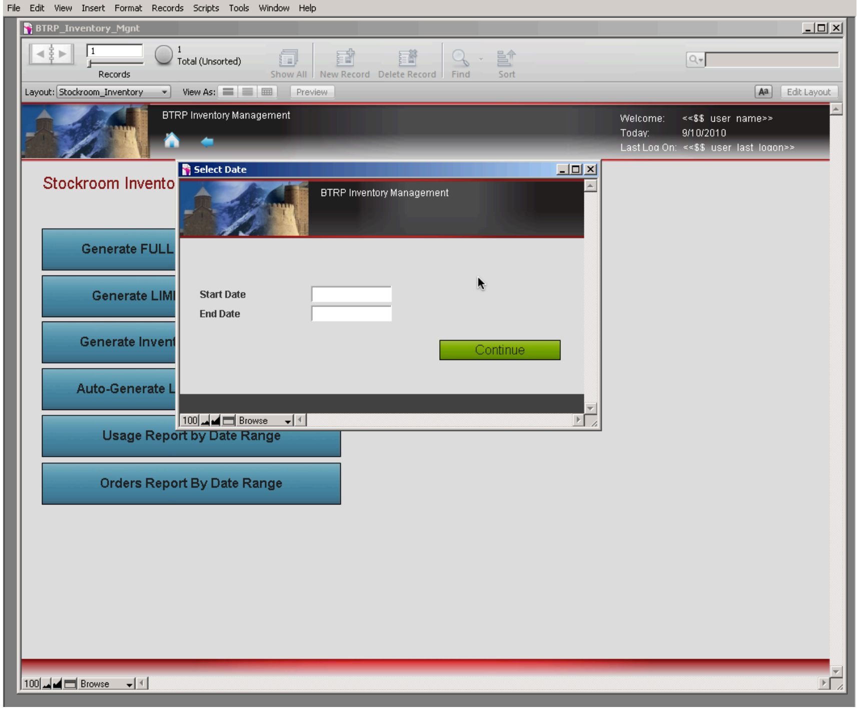
PDF icon: to generate a .pdf report,

Print icon: to print a copy of the report.

To close the report and return to the Reports main screen, press the **Close** button.

Generating Order Report by Date Range

Path: Dashboard > Reports > Orders Report by Date Range



Description

Use this section to generate a list of items that were ordered during the specified time period.

Enter the dates for the period of interest in the pop-up window and press **Continue**.

When the list displays, in the upper right-hand corner, select the:

XLS icon: to generate an Excel (.xls) report,

PDF icon: to generate a .pdf report,

Print icon: to print a copy of the report.

To close the report and return to the Reports main screen, press the **Close** button.