

How To - Inventory

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Prerequisites:

1. All users and rights must be defined using **CONFIGURATION>Users**.
2. All buildings and rooms, including room supervisors, must be defined using **CONFIGURATION>Buildings and Structures**.

User Rights for Inventory:

- **isInventorySuperAdmin** - Add/Edit/Delete inventory entries PLUS Create/Print inventory snapshots. This user has full control over all inventory actions. Grant this right to only trusted administrative users. Users with this right can add/edit/delete inventory entries created by any user using **ADMINISTRATION>Inventory**. Users with this right can create/initiate/delete/print inventory snapshots using **INVENTORY>Inventory Log**.
- **isInventoryAdmin** - Add/Edit inventory entries but NOT Delete PLUS print inventory log snapshots. This is much more restrictive. Users with this right can add entries to inventory using **ADMINISTRATION>Inventory** and edit entries they create but not entries created by others. Users with this right can't delete any entry, including entries created by themselves. Users with this right can print inventory snapshots using **INVENTORY>Inventory Log**. This right might be assigned to users in receiving to allow them to quickly add new purchases to inventory. These restrictions are necessary to reduce inventory database impact from accidental or malicious modifications.
- **isInventoryAdminDelete** - Add/Edit inventory entries PLUS Delete entries created by this user only. Same rights as isInventoryAdmin with delete capability. While this user can completely delete entries they create, this user can't alter or delete entries created by other users. Inventory database impact is reduced to only entries created by this user.
- **isInventoryVerifier** - Scan barcodes into inventory snapshots for verification of inventory PLUS print inventory log snapshots. Users with this right can't add/edit/delete inventory entries. Users with this right can scan inventory ID's into inventory snapshots for verification using **INVENTORY>Inventory Log**. This right is assigned to users that simply verify inventory by scanning barcodes.
- **isInventoryMonitor** - Generate detailed inventory reports using **REPORTS>Inventory**. This right is typically assigned to administrators, business managers, and possibly school board personnel.

How To Use Inventory:

1. Users having *one* of the rights **isInventorySuperAdmin**, **isInventoryAdmin**, or **isInventoryAdminDelete** will put items in the inventory database using **ADMINISTRATION>Inventory**. Be sure to keep this database current (room changes, assigned user changes, etc.) and mark items as unavailable when items are disposed of and no longer property of the district.
2. All district users will be able to view inventoried items assigned to them or the room/office for which they are responsible using **MY APPS>My Inventory**.
3. When you are ready to verify inventory, possibly at the beginning and again at the end of the school year or more often if you prefer, a user with the right **isInventorySuperAdmin** will create an inventory snapshot for a building using **INVENTORY>Inventory Log**. An inventory snapshot contains a list of all items from the inventory database that are assigned to the indicated building at the time of snapshot creation. Obviously, the snapshot won't include items added to a building's inventory after the snapshot date.
4. To verify the presence, or absence, of items in a building's inventory, a user with the right **isInventoryVerifier** will use **INVENTORY>Inventory Log** to scan inventory barcode ID's individually or in bulk. The date observed and name of the observer/verifier will be shown in green next to the item. The observer/verifier will be presented with a list of "misfits" or items that aren't listed in this building's inventory or maybe that were added after the snapshot date. The observer/verifier should either print the list of misfits or save it as a PDF for troubleshooting later. The verifier could use a portable tablet/smartphone and Bluetooth barcode scanner (such as Netum NT-1202W) to speed up the process. However, a stable internet connection is required for individual barcode scanning. If a stable internet connection is not available, the verifier could use a portable barcode scanner with storage capability to scan multiple (hundreds or thousands) barcodes and then dump those barcodes into a snapshot using the bulk barcode download option.
5. Users with the right **isInventoryMonitor** can print detailed inventory reports using **REPORTS>Inventory**. These reports include the date each item was last observed/verified.