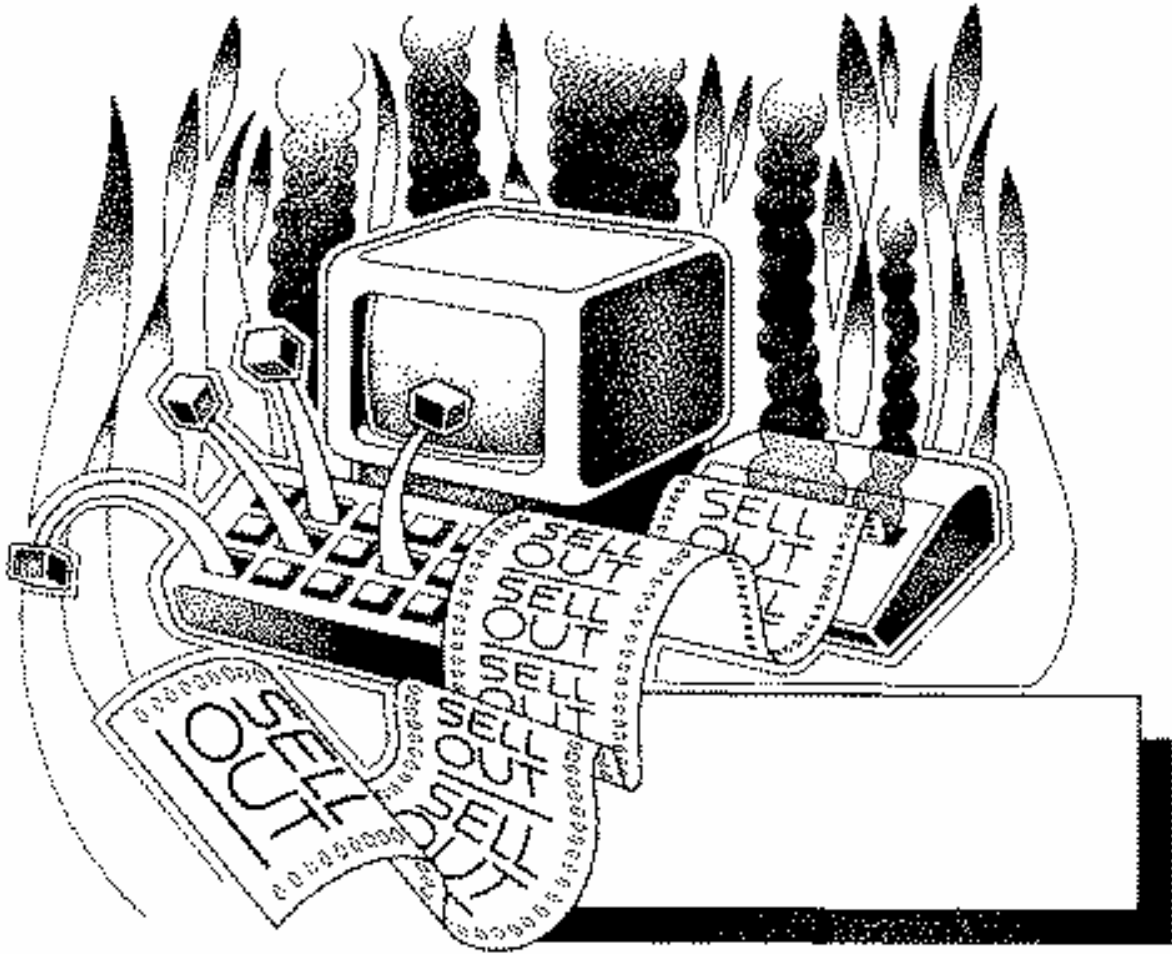


# Inventory



**User's Manual**

# **Inventory**

Health District Information System

HDIS (Windows Ver. 4.0 )

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**CHC** Software, Inc.  
Health District Information Systems  
[helpdesk@hdis.org](mailto:helpdesk@hdis.org)

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# Introduction

This program is designed to assist you in organizing a systematic approach to entering your inventory and provides accurate up-to-date records within your health district.

Please review the manual carefully to obtain the maximum benefits. **Little or no prior computer experience is necessary to operate this program.**

## About This Manual

*The Inventory Module* is simple to use. *The maximum benefit with the least time spent will be obtained if you start at the first page of this manual and follow the directions exactly as you enter the first record in your computer.*

Square boxes in this manual surround the key you are to press on your keyboard. As an example, when you read ,

ENTER

press the **enter** key on your keyboard.

The word **TYPE** is followed by bracketed [ ] instructions of what to type into a field.

Note: For Technical Support, email: [helpdesk@hdis.org](mailto:helpdesk@hdis.org)



# Navigation

Whenever you see one



click the left side of your mouse once.

Whenever you see two



click the left side of your mouse twice.

## Navigation Keys For Entering Information

**Tab**

or

**ENTER**

to move to next field

**Shift**

**Tab**

or

**Up**

to go back one field

**Alt**

+

**R**

places you in the receipt screen.

## Editing Keys

**Backspace**

deletes one character left of cursor

**Delete**

deletes one character

**Insert**

inserting & overwriting modes

When you see a pull-down field, click the arrow to the right to view all your choices.



## Starting HDIS

### MICROSOFT Windows Users

**Start**

**Programs**

**Health District Info Systems**

**HDIS**

# Health District Information System Menu Bar

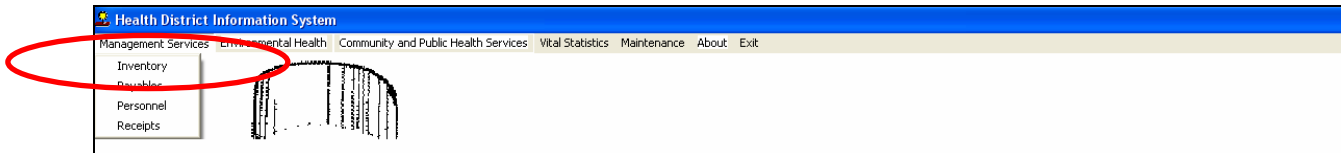
HDIS (Health District Information System) has several different modules designed to assist your health district in its day-to-day operations. The **Inventory Module** is a great addition to these modules and simplifies your record keeping and information management needs.



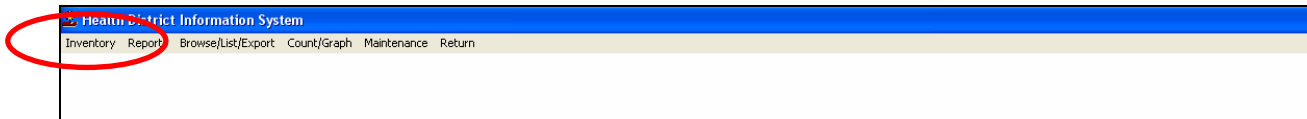
Select Management Services



Select Inventory



Inventory



# Entering an Item

The screenshot shows a software window titled "Inventory -". It has two tabs: "Find" and "Inventory". The "Find" tab is active. Below the tabs, there are five radio buttons for search criteria: "by Tag Number" (selected), "by Serial Number", "by P.O. Number", "Description", and "Item". Below these is a text input field with the prompt "Enter Information and press enter." To the right of the input field are two buttons: "Add" and "Close". The "Add" button is circled in red. Below the input field is a table with three columns: "Tag Number", "Item", and "Description".

Tag Number	Item	Description
00023	CABINET	CABINET, STORAGE
00032	CART	CART, MOBILE
00042	TABLE	TABLE, TYPEWRITER
00044	CASSETTE PLAY	CASSETTE PLAYER
00046	PROJECTOR	PROJECTOR, SLIDE W/CASE
00049	FILE CABINET	FILE CABINET, 4 DRAWER, BROWN
00050	FILE CABINET	FILE CABINET
00051	TYPEWRITER	TYPEWRITER, IBM WHEELWRITER V
00059	CART	CART, MOBILE
00062	CORK BOARD	CORK BOARD, SMALL
00063	CART	CART, MOBILE
00070	FILE CABINET	FILE CABINET, 4 DRAWER, BROWN

The **FIND** tab on the Inventory window is for locating an item. You can browse through the grid or type the **Tag Number** in the **Enter Information and press enter.** field. To find an item by **Serial Number**, click the radio button labeled **by Serial Number** and then enter the number. To find an item by **P.O. Number**, click the radio button labeled **by P.O. Number** and enter the number. To find an item by **Description**, click the radio button labeled **by Description** and enter the description. To find an item by **Name**, click the radio button labeled **by Item** and enter the name.

To add an item to your list, click the **Add** button.  
**Once the Item is entered you will not have to enter it again.**

You may now begin to enter information into the fields. Remember, you can use the “**Tab**” or the “**Enter**” key to advance from field to field. On this page, you will fill out the information for the item.

Field	Description
Tag Number	Enter the Tag Number of the item.
County Tag Number	Enter the County Tag number of the item.
Item	Enter the item.
Model	Enter the model number of the item.
Manufacturer Name	Enter the manufacturer name.
Classification	Enter the classification or description of the item.
Serial Number	Enter the serial number of the item.
Responsible Department	Choose the department responsible for the item. (You may set this table up in the Maintenance menu)
Location of Item	Choose the location of the item. (You may set this table up in the Maintenance menu)
Share in an Emergency	Check if this item is to be shared in case of an emergency.
Date of P.O.	Enter the date of the purchase order.
Vendor Name	Enter the vendor name.
P.O. Number	Enter the purchase order number.
Voucher	Enter the voucher number.
Date Acquired	Enter the date the item was acquired.



Grant Number	Choose the grant number used to purchase the item. (You may set this table up in the Maintenance menu)
Condition	Choose the condition of the item. (You may set this table up in the Maintenance menu)
Cost	Enter the cost of the item.
Value	Enter the current value of the item.
Last Date Verified	Enter the date the last time the value of the item was verified.
Previous	Click for the previous item in the database.
Next	Click for the next item in the database.
Delete	Click to delete the item.
Add*	Click to add an item. <b>**Right click to add the same item, but with a blank tag number.</b>
Modify	Click to modify a record.

# Discarding an Item



## Discard

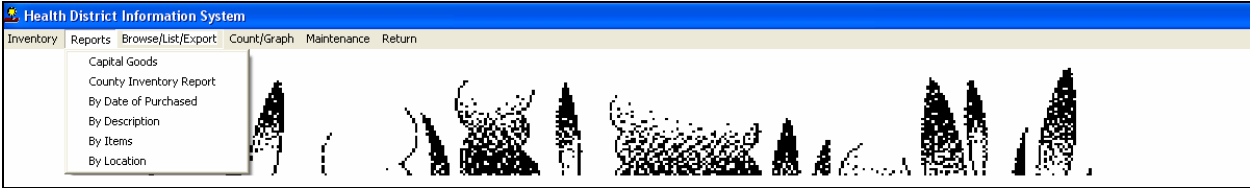
This “**Discard**” tab on the “**Inventory**” page allows you to enter the information if the item is or has been discarded.

Field	Description
Item Discarded	Check if the item has been discarded.
Date Discarded	Enter the date the item was discarded.
Reason Discarded	Choose the reason the item was discarded. (You may set this table up in the Maintenance menu)
Discarded Value	Enter the discarded value of the item.
Note/Means of Discard	Enter the means of discard.
Memo	Click to enter other information/notes on the item.

# Reports



## Reports



The **Inventory** module has a set of pre-defined reports from which to choose.



You may preview the report before printing. Also, you have the ability to use filters to build a query.

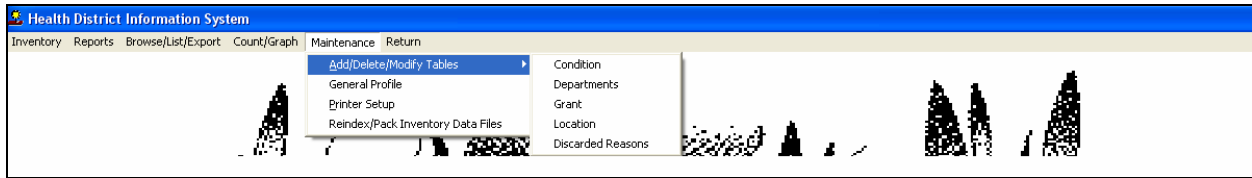
## Reports

Report	Description
Capital Goods	Generates a description report for all of the items entered in the inventory database.
County Inventory Report	Generates a inventory report ordered by the county tag number.
By Date of Purchased	Generates an inventory report for your items by date of purchase.
By Description	Generates an inventory report by description.
By Items	Generates an inventory report by item.
By Location	Generates an inventory report of your items by location.

# Maintenance - Add/Delete/Modify Tables



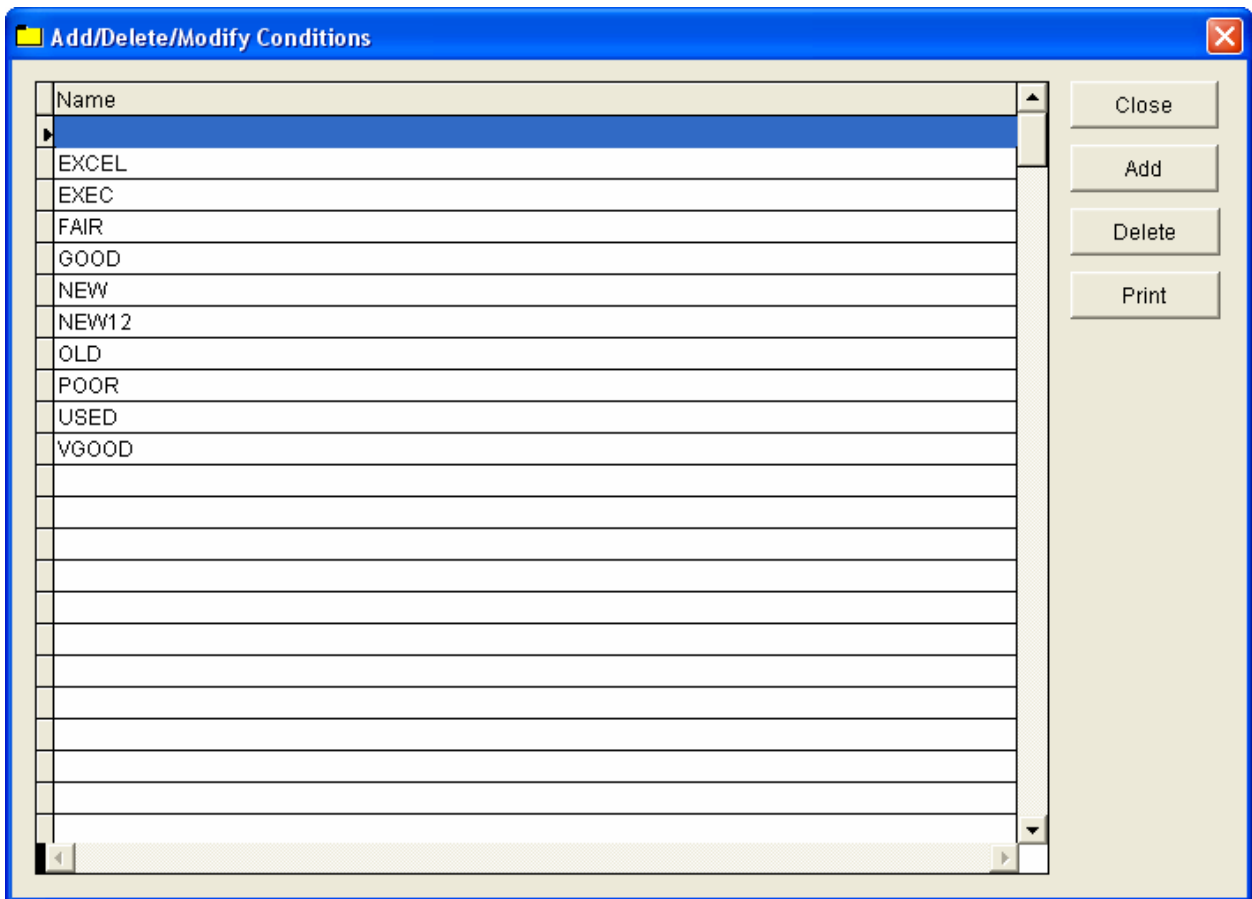
## Maintenance



The **Maintenance Menu** contains a list of the tables that you can modify for your program.



## Conditions



Field/Button	Description
Name	Enter the condition.
Close Button	Closes the table.
Adds Button	Adds a condition to the table.
Delete Button	Deletes a highlighted entry.
Print Button	Prints the list.







## Locations

Name
100
100A
101
102
102A
103
104
105
106
107
108
109
111
112
112A
113
114
115
115/116
116
118
119
120

Field/Button	Description
Name	Enter the location.
Close Button	Closes the table.
Adds Button	Adds a location to the table.
Delete Button	Deletes a highlighted entry.
Print Button	Prints the list.



## Discarded Reasons

The screenshot shows a software window with a blue title bar containing the text "Add/Delete/Modify Discarded Reasons" and a close button (X). The main area is a table with a header row "Name" and several data rows. The first two rows contain "AUCTION" and "BROKEN". To the right of the table are four buttons: "Close", "Add", "Delete", and "Print".

Field/Button	Description
Name	Enter the reason
Close Button	Closes the table.
Adds Button	Adds a reason to the table.
Delete Button	Deletes a highlighted entry.
Print Button	Prints the list.





## General Profile

**General Profile** [Close]

**Demographics** | General | Management | Environmental | Community & Public Health Services | Vital

Health Department

Division

Address1

Address2

City  State  Zip

County

Phone #'s  FAX #

Federal Tax ID

Commissioner

Client/Server Location

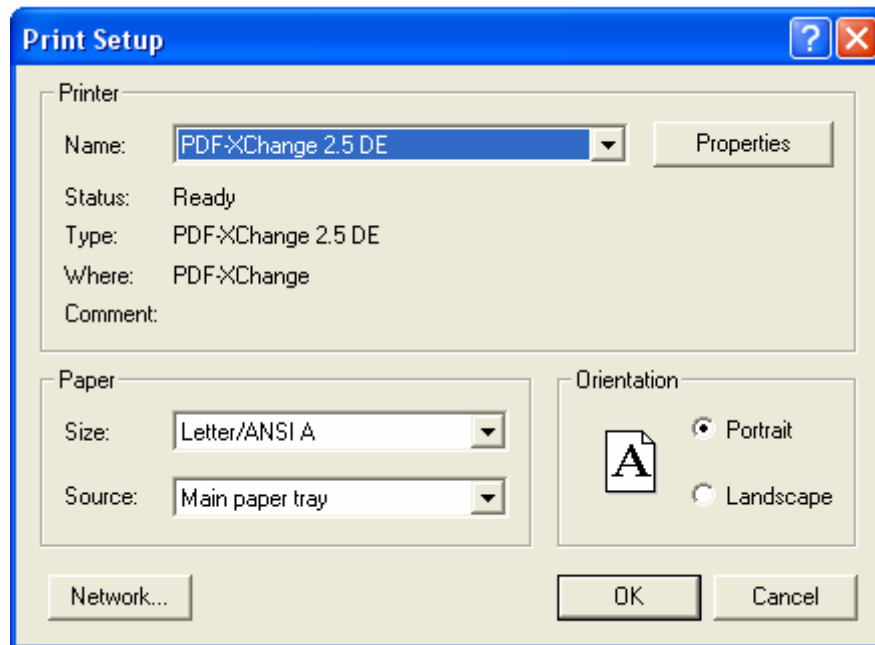
2004  2003  2002  2001  2000  1999  1998

Make Checks Payable to:

The **General Profile** enables you to fill out the basic information for your health department.



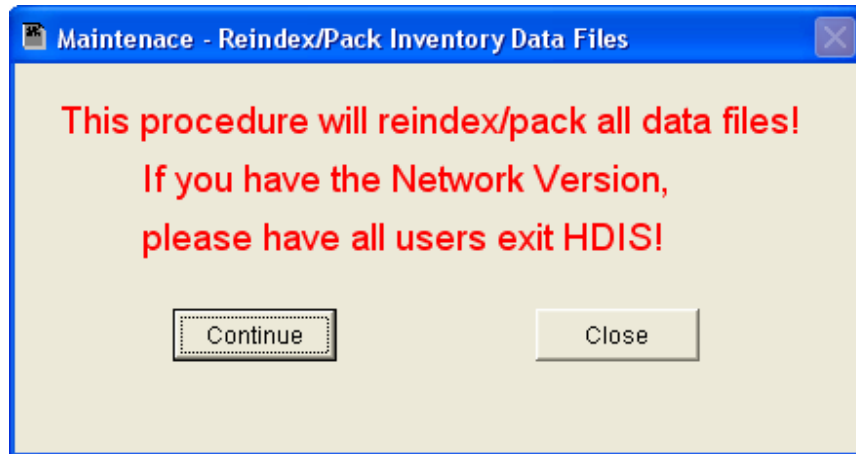
## Printer Setup



The print setup allows you to choose from which printer you wish to print. Pick the printer in the name dropdown and click **OK**.



## Reindex/Pack Inventory Data Files



**This function is only needed should your data be corrupted due to a power failure. Please contact CHC Software if you have any questions or concerns.**

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**helpdesk@hdis.org**

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