

StockTaker Handheld User Guide

Version 2.0.0

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PERFORMING A STOCK TAKE (StockTaker):

- **IMPORTANT:** Ensure the handheld is connected to the network. This can be achieved by placing the handheld in a cradle or by connecting to a wireless network. Contact your systems administrator if you require further support.
- When the application starts, you are presented with the following form.
 - **View Stock Take Schedule:** Tap this button to perform a regularly scheduled stock take.
 - **View Available Stock Lists:** Tap this button to view all the stock lists that have been downloaded from MEDITECH. Refer to **section 2 (UNSCHEDULED STOCK TAKE)** of this document for more information.
 - You can change the current transaction type by clicking on the arrow by **Process Exchange Cart** and selecting a different transaction type.
 - Switch applications via the StockReceiver menu item at the bottom of the screen. If this option is greyed out, you do not have a licence to use StockReceiver.



NOTE:

- Before beginning a stock take, the required stock list files must first be extracted from MEDITECH using the MEDITECH Materials Management module. Refer to the MEDITECH documentation for instructions on how to do this.
- Stock list files extracted from MEDITECH must be placed in the MEDITECH Output Folder for your health facility.
- The name of the stock list files must end in “.inv”. An example of a stock list file name would be “StockList1.inv”.

Menu Options:

Tap “Menu” at the bottom right corner of the main screen to access the menu options.

- **Help:** Provides a general overview on how to use the StockTaker application.
- **Health Facility:** Allows you to update the health facility the handheld is associated with. You need a network connection to use this option.
- **Settings:** Allows you to update the StockTaker settings. You need the admin password to access this option. The following settings can be updated:
 - **Web Services URL:** The URL where the web services are located.
 - **Admin Password:** Used to access the Settings screen and exit StockTaker.
 - **Licence Key:** Required for StockTaker to run.
 - **Health Facility ID:** ID of the health facility the handheld belongs to.
 - **Kiosk Mode:** True indicates StockTaker is the only application the user is able to use. False indicates the user is able to exit StockTaker and access other applications.
 - **Default Start:** The application that will start when StockTaker starts up.

StockTaker 5:48

Select the setting you want to update.

Web Services URL:
http://WebServicesServer/StockTaker/WebServices/WebServices.asmx

Admin Password:

Licence Key: S42R9SX489

Health Facility ID: GBS HC

Kiosk Mode: FALSE

Default Start: STOCKTAKER

Save Cancel

Keyboard icon circled in red.

Use the keyboard icon to display/hide the on-screen keyboard.

- **Exit:** Allows you to exit StockTaker. The following screen will be displayed if StockTaker is running in kiosk mode. You will need the admin password to exit from the application. Speak to your systems administrator if you do not know the admin password.

Please enter the StockTaker admin password to continue. Contact your systems administrator if you require further support.

Admin Password:

7	8	9	<-
4	5	6	
1	2	3	
	0		

1 SCHEDULED STOCK TAKE

You will be presented with one of the following three scenarios when you begin a scheduled stock take:

- **Start a new scheduled stock take:**
If there is no existing stock take data to be uploaded to the server and no partially completed stock take, you will be able to start a new stock take.
- **Upload existing stock take data:**
You will be prompted to perform an upload if a stock take has been completed or partially completed and the data is ready to be uploaded to the server. You must either upload the data or delete it before you can continue the stock take process. Refer to **section 3** of this document for more information.
- **Finish a partially completed stock take:**
If you have partially completed a stock take, you will be prompted to continue that stock take. If you decide not to continue the stock take, the incomplete portion of the stock take will be deleted. Refer to **section 5** of this document for more information.

1.1 START NEW SCHEDULED STOCK TAKE

The following steps outline how to perform a scheduled stock take. Please note that a scheduled stock take is **only** possible if your transaction type is a Process Cart Exchange.

1. Select the day(s) of the week for which you want to perform a stock take and tap **View**. A list of the available schedules will then be displayed.

Select Required Schedule(s)

Week Day
<input type="checkbox"/> Sunday
<input type="checkbox"/> Monday
<input type="checkbox"/> Tuesday
<input type="checkbox"/> Wednesday
<input checked="" type="checkbox"/> Thursday
<input type="checkbox"/> Friday
<input type="checkbox"/> Saturday

View

Cancel

2. Select a schedule from the drop down list(s) for each day and tap **Select**. The scheduled stock lists will then be downloaded to the handheld.

Select the Schedule(s) you Require:

Sunday

Select

Cancel

NOTE: The scheduled stock lists must be extracted from MEDITECH on the day you plan to perform your stock take. You will be presented with the names of missing scheduled stock lists in the event that one or more of these lists has not been extracted from MEDITECH or is out of date. Refer to **section 6** of this document for more information

1.2 RECORDING STOCK LEVELS

You are able to perform a stock take once the stock lists have been downloaded to the handheld. You can now remove the handheld from the cradle.

- 1) Select a stock list and tap **Select** to view items in the list.

Select a Stock List

Stock List ID	Read
GBSLAB002	No
GBSLAB001	No
GBSOP0005	No

You are now ready to perform a stock take. You can now remove the handheld from the cradle/disconnect it from the network.

Select

Done

- 2) Tap the stock item you want to record a stock level for. You can also search for a stock item by its stock number by using the keypad at the bottom of the form.

Barcode Scanning: If you have a device with a barcode scanner, you can use it here. Aim the scanner at the barcode you want to read. The quantity form for the scanned item will be displayed when the scan has completed successfully. A message will be displayed if the scanned item is not found in the current stock list.

Keyboard: If your device has a keyboard, you will be able to use it here. Use the numeric portion of the keyboard to enter the stock number of the item you want to read.

New: If you are performing a Department Issue, Department Return, or Inventory Restock Requisition, you will have the option of creating new stock items (see [section 3](#)).

Select a Stock Item

Stock List: INNLABR001
Transaction Type: DepartmentIssue

Qty	Stock #	Description
	0002507	GLOVE EXAM PWD
	0002508	PROBE COVER
	0002520	COVER PROBE COR
	0002509	GLOVE EXAM SYN
	0000467	GLOVE EXAM PWD
	0000465	GLOVE EXAM PWD

Search by Stock #:

New

Done

7	8	9	<-
4	5	6	
1	2	3	
0			

Use the number pad to record the quantity on hand for the item displayed. To move to the next item in the cart tap the >> button. To move to the previous item tap the << button. Tapping the >> or << buttons will cause the quantity value entered to be saved. Tap **Done** to exit the "Quantity" form. You will then be taken back to the "Select a Stock Item" form.

NOTE: If you are using the arithmetic functions ('+', '-', '*'), you must tap the '=' button to complete a calculation. For example, if you tapped the buttons '8 +3' and then tapped the >> button, the quantity recorded would be 3 and not 12. You would need to tap '8 + 3 =' for the quantity of 12 to be recorded.

Barcode Scanning: If you have a device with a barcode scanner, you can use it here. Aim the scanner at the barcode you want to read. The quantity form will be updated to display the details of the scanned item when the scan has completed successfully. A message will be displayed if the scanned item is not found in the current stock list.

Keyboard: If your device has a keyboard, you can use the numeric portion of the keyboard to enter the quantity on hand for the current item.

Quantity on hand for: HANDLE FOR YANK SCTN DEVICE (5)

Stock List: GBSLAB004
Location: D015
Unit of Issue: EA
Stock #: 0000860

QoH:

7	8	9	+	-
4	5	6	*	C
1	2	3	=	
0				

Clear	<<	>>	Done
-------	----	----	------

- Tap "Done" to return to the "Select a Stock List" form when you have finished reading the stock list. Note that if you are performing a transaction without downloading MEDITECH files you will skip to the Additional Information form found in section 1.3.

Select a Stock Item

Stock List: GBSLAB004

Qty	Stock #	Description
	0002044	SYRINGENDL 10CC
8	0001373	CATHETER SCTN W
54	0001370	CATH SUCTION 18
3	0001563	TUBING CONN 7MM
	0000860	HANDLE FOR YANK
6	0000861	HANDLE YANK W/O
	0000859	SUCTION TIP POO

Search by Stock #:

7	8	9	<-
4	5	6	
1	2	3	
0			

Done

4) You can now select another stock list to read. Stock lists that have been read will have the word "Yes" beside them. Tap **Done** once you have finished reading carts.

Select a Stock List

Stock List ID	Read
GBSLAB002	Yes
GBSLAB001	No
GBSOPD005	No

You are now ready to perform a stock take. You can now remove the handheld from the cradle/disconnect it from the network.

Select

Done

1.3 RECORDING ADDITIONAL INFORMATION

This section is only applicable if your transaction type is Department Issue, Department Return or Inventory Restock Requisition. Otherwise please skip to [section 1.4](#).

MIS Department Number: (Department Return or Department Issue)

Barcode Scanning: If you have a device with a barcode scanner, you can use it here. Aim the scanner at the barcode you want to read. The transaction information form will be updated to display the details of the scanned item when the scan has completed successfully.

Keyboard: If your device has a keyboard, you can use the numeric portion of the keyboard to enter the MIS number, you can also pull up the embedded keyboard by tapping on the keyboard icon in the bottom right.

StockTaker 9:36

Enter Transaction Information

DepartmentIssue

Enter MIS Dept. #

7 8 9 <-

4 5 6

1 2 3

0

Done Back

Supplying and For Inventory: (Inventory Restock Requisition)

Barcode Scanning: If you have a device with a barcode scanner, you can use it here. Aim the scanner at the barcode you want to read. The transaction information form will be updated to display the details of the scanned item when the scan has completed successfully. The first scanned barcode will appear in the Supplying Inventory text box. If you scan a second barcode it will appear in the For Inventory text box, and so forth.

Keyboard: You must first tap on one of the text boxes before entering characters. If your device has a keyboard, you can use the numeric portion of the keyboard to enter the inventory names, you can also pull up the embedded keyboard by tapping on the keyboard icon in the bottom right.

StockTaker 9:36

Enter Transaction Information

InventoryRestockReq

Supplying Inventory: For Inventory:

7 8 9 <-

4 5 6

1 2 3

0

Done Back

What Would You Like to Do Next?

1.4 FINALISING A STOCK TAKE

Once you have finished performing a stock take you have two options:

- **Stock take complete:** Selecting this option will allow you to upload the stock take data to the server. All stock take data will be removed from the handheld.
- **Stock take partially complete:** Selecting this option will allow you to upload the stock take data to the server. Any stock lists that were not read during the current stock take will be saved. You will then be able to perform a stock take using these stock lists at a later time.

- Stock take complete. Upload data
- Stock take partially complete. Upload data

Select

Cancel

- Tap the **Select** button once you have made your selection.
- Tap the **Cancel** button to return to the “Select a Stock List” form.

1.5 UPLOADING STOCK TAKE DATA

NOTE: Make sure the handheld is connected to the network before attempting to upload stock data.

- 1) You will be presented with the following options when uploading stock take data to the server:
 - **Upload:** Tap this button to upload stock take data immediately.
 - **Upload Later:** In the event you that you do not have a connection to the network, tap this button to upload stock data at a later time. Your stock take data will be saved and you will be able to upload it to the server at a later time. See **section 4** of this document for more information.

Upload stock take data to the server.

Make sure the handheld is cradled/connected to the network before uploading data.



Upload stock take data to the server.

Stock take data has been successfully uploaded.

- 2) The following screen will be displayed when the upload process is complete. Tap **Done** to return to the main form.



2 UNSCHEDULED STOCK TAKE USING MEDITECH FILES (ALL TRANSACTION TYPES)

Selecting **View Available Stock Lists** from the main form will display a list of all available stock lists (see right). If you are using the Department Issue, Department Return or Inventory Restock Requisition transaction types, selecting **Start Transaction**, then answering Yes to whether you would like to download MEDITECH files will bring you to this same screen.

- Select the stock lists you want to download and tap the **Download** button. The selected inventories will then be downloaded to the handheld.
- Tap **Cancel** to return to the main form.

Available Stock Lists

Mnemonic	File Name
<input type="checkbox"/> GBSLAB004	stock11.inv

Download

Cancel

2.1 Corrupt Stock List

The following form will be displayed if one or more stock list files are corrupt or formatted incorrectly. You will need to re-extract the stock list(s) from MEDITECH before being able to download them.

- Tap **Continue** to view a list of the available stock lists.
- Tap **Exit** to return to the main form.

Preparing List of Available Stock Lists

ALERT

The following file(s) were not processed successfully. Verify that they are correctly formatted:

- stock04.inv

Continue

Exit

3 UNSCHEDULED STOCK TAKE WITHOUT MEDITECH FILES (DEPARTMENT ISSUE, DEPARTMENT RETURN, INVENTORY RESTOCK REQUISITION)

From the main menu, selecting Department Issue, Department Return, or Inventory Restock Requisition as a transaction type, then tapping **Start Transaction** will bring up a prompt. Choose **No** to choose not to download MEDITECH files.



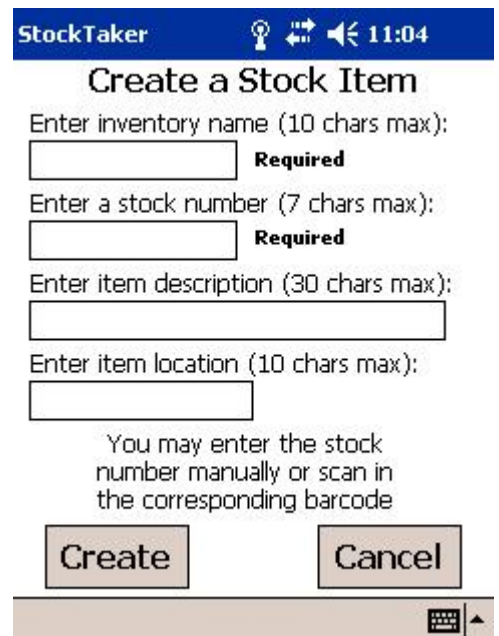
You are now creating your first stock item for your own stock list. Enter the following:

- Inventory Name
- 1- 7 digit Stock Number
- Item description (optional)
- Item location (optional)

Use your device keypad or the embedded keyboard by tapping on the bottom right icon. Note that you must first tap the applicable text box in order to enter data.

The item description and item location fields are optional; this data will not be saved anywhere once you upload your transaction data to MEDITECH.

Tap **Create** to continue.



You will now be presented with the Select a Stock Item screen, go to [section 1.2.2](#) for more information. Note that you will be able to create more stock items at this page by tapping **New**.

4 UPLOAD EXISTING STOCK TAKE DATA

The following form will be displayed if there is stock take data on the handheld that has not been uploaded to the server.

- Tap **Upload** to upload the data to the server
- Tap **Delete** to delete the stock take data
- Tap **Cancel** to return to the main form.

NOTE: Refer to **section 1.4** of this document for further instructions on uploading.



5 FINISH PARTIALLY COMPLETED STOCK TAKE

The following form will be displayed if you have partially completed a stock take.

- Tap **Continue** to continue the stock take. This will take you to the "Select a Cart" form. Refer to **section 1.2** of this document for more information on continuing the stock take process.
- Tap **Start New** to delete the partially completed stock take data. You will then be able to start a new stock take with the currently selected transaction type.
- Tap **Delete** to delete the partially completed stock take data. You will then be returned to the main screen
- Tap **Cancel** to return to the main screen. The partially complete stock take data will not be deleted.

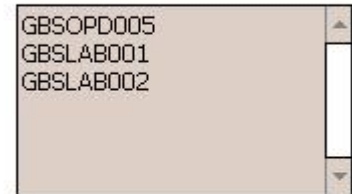


6 SCHEDULED STOCK LISTS ARE UNAVAILABLE

The following form will be displayed if one or more scheduled stock lists cannot be found. The missing stock lists will be listed. Select one of the following options to continue

- **Download Available Stock Lists:** Select this option and tap **Continue** to download the scheduled stock lists that were found. Once the stock lists are downloaded you are ready to perform a stock take. Refer to **section 1.2** for details on how to continue the stock take process.
 - **View All Remaining Stock Lists Extracted From MEDITECH:** Select this option and tap **Continue** to view all the stock lists that have been extracted from MEDITECH. See **section 6.1** below for more details
- Tap **Cancel** to return to the main form.

The following stock lists were not available for download. Please ensure you have extracted these stock lists from Meditech.



- Download Available Stock Lists
- View All Remaining Stock Lists Extracted From Meditech

Continue

Cancel

6.1 View All Remaining Stock Lists Extracted From MEDITECH

The following screen is displayed when viewing remaining stock lists extracted from MEDITECH.

- Place a check beside the stock lists you want to download and tap **Download**. Once the stock lists are downloaded you are ready to perform a stock take. Refer to **section 1.2** for details on how to continue the stock take process.
- Tap **Cancel** to return to the previous form.

Available Stock Lists

Mnemonic	File Name
<input type="checkbox"/> GBSLAB004	stock11.inv

Download

Cancel

DELIVERING PURCHASE ORDERS (StockReceiver):

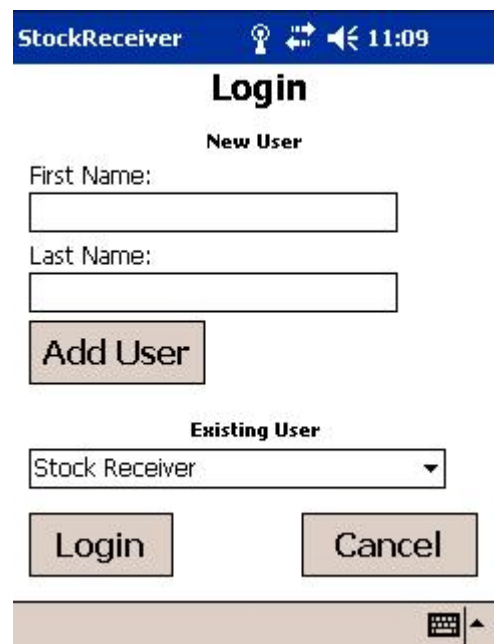
1. GETTING STARTED

You can switch between StockTaker and StockReceiver by using the menu option at the bottom of the main form. If this option is greyed out, you do not have a licence to use StockReceiver.

- Select **Start** from the StockReceiver menu. Then tap the **Start** button on the StockReceiver main screen. The **Login** form will then be displayed



- Select your name from the drop down list under **Existing Users** and tap the **Login** button. If your name is not in the list, enter your first and last name in the text boxes under **New User** and tap the **Add User** button.



2. DOWNLOADING PURCHASE ORDERS

Before downloading purchase orders to the handheld, make sure to extract a purchase order NPR from MEDITECH to the NPR folder before. Contact your system administrator if you do not know the path to the NPR folder for your health facility.

- Ensure the handheld is cradled/connected to the network.
- Tap the **Download** button to download the NPR data to the handheld. The purchase orders from the NPR(s) will then be displayed.



3. DELIVERING PURCHASE ORDERS

Once you have downloaded purchase orders to the handheld, you are able to view the details of each order and mark the order as accepted or refused.

3.1. ACCEPTED DELIVERIES

- Use the **Dept** and **P.O.#** drop down lists to locate the purchase order you want to deliver.
- Tap the **Accept** button when the purchase order has been delivered. The Signature Capture form will then be displayed

Item	Qty	Unit	Vendor Catalogue #
MISCELLANEOUS	2	CS	

- Have the recipient sign in the box and tap the **Save** button to save the delivery. The purchase order will then be removed from the list.

Sign in box

SR

3.2. REFUSED DELIVERIES

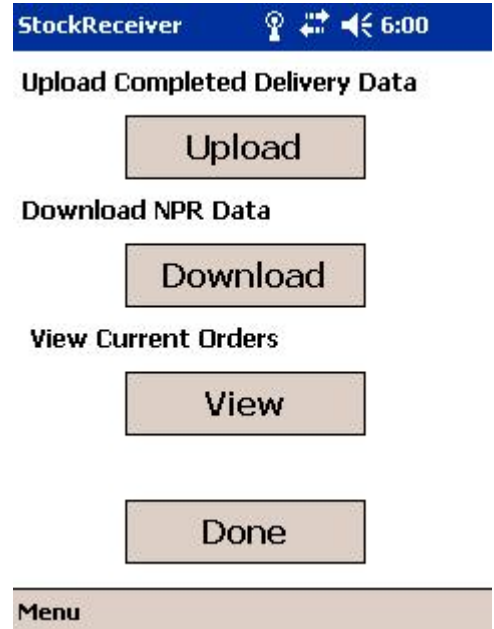
StockReceiver allows you to record when a recipient refuses a purchase order.

- Use the **Dept** and **P.O.#** drop down lists to locate the purchase order you want to deliver.
- Tap the **Refuse** button to indicate that the recipient refused the purchase order. The purchase order will be marked as refused and will be removed from the list.



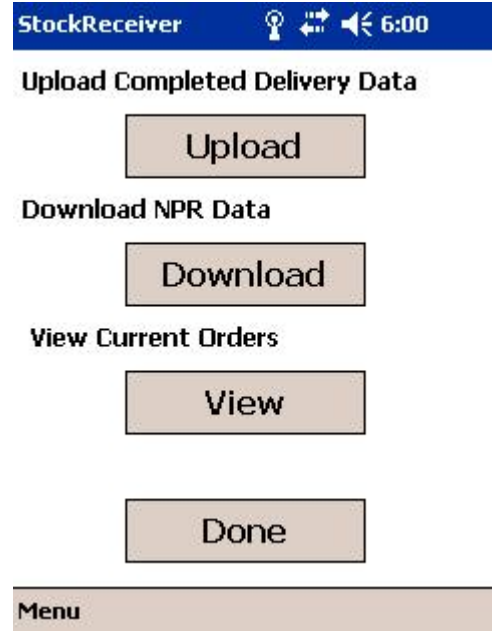
4. VIEW EXISTING PURCHASE ORDERS

The **View** button will be enabled if there are undelivered purchase orders on the handheld. Tap the **View** button to process these purchase orders. The **View** button will be disabled if there are no purchase orders on the handheld.



5. UPLOADING DELIVERY DATA

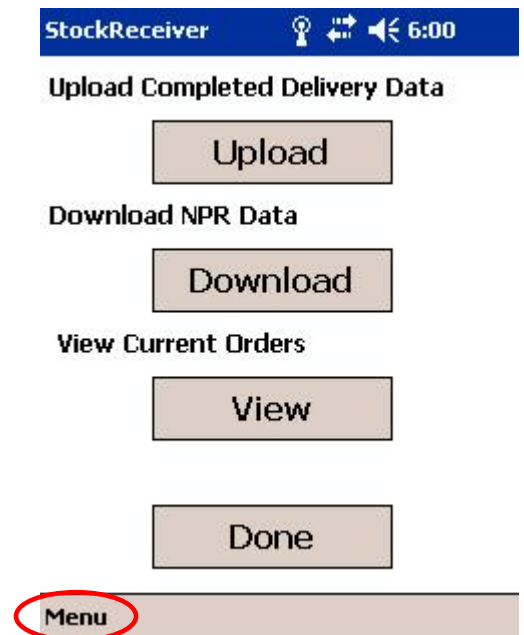
The **Upload** button will be enabled if there is delivery data to upload. Ensure the device is cradled/connected to the network and then tap the **Upload** button. The **Upload** button will be disabled once the delivery data is uploaded.



6. DELETING UNPROCESSED PURCHASE ORDERS

You can delete unprocessed purchase orders from the handheld. This may be necessary if you have downloaded purchase orders which you do not need to deliver. Note that using this option will delete all unprocessed purchase orders. Purchase orders that have been marked as accepted or refused will not be deleted.

- Tap on the **Menu** option
- Select **Delete POs**
- Enter the admin password to complete the delete process.



Trouble Shooting

- **“The remote name could not be resolved”**

This error will occur if the application has an incorrect address for the StockTaker server. The server address is stored in the StockTaker.ini file, which is located in the “\Program Files\StockTaker\” directory on the handheld device. Have your system administrator ensure that the server address is correct and is in the correct format. You can also use the Settings screen to update the StockTaker.ini file. The Settings screen is available from the **Menu** on the Main screen.

Note: any changes to the StockTaker.ini file may require a soft reset to be performed on your device before the changes take effect. Refer to the user guide of your handheld device for instructions on how to perform a soft reset.

- **“Resource assembly could not be found”**

This error can occur if one or more settings in the StockTaker.ini are incorrectly configured. The StockTaker.ini file is located in the “\Program Files\StockTaker\” directory on the handheld device. Have your system administrator ensure that your StockTaker.ini file is set up correctly. You can also use the Settings screen to update the StockTaker.ini file. The Settings screen is available from the **Menu** on the Main screen.

Note: any changes to the StockTaker.ini file may require a soft reset to be performed on your device before the changes take effect. Refer to the user guide of your handheld device for instructions on how to perform a soft reset.

- **“A connection could not be made to the server. Ensure that your device has a valid connection to the network”**

This error may occur if StockTaker is unable to locate the StockTaker server using the URL in the initialisation file. Have your system administrator verify that the server URL in the StockTaker.ini file is correct. If the server URL is correct, try using the IP address of the server instead of the server name.

This error may also occur if the network settings on the handheld device network are incorrect. The following steps outline how to update the network settings on a Windows Mobile 2003 device:

- a. Select “Setting” from the Start menu.
- b. Tap the “Connections” tab at the bottom of the screen
- c. Tap the “Connections” icon
- d. Tap the “Advanced” tab at the bottom of the screen
- e. Tap “Select Networks”
- f. Change the selection under “Programs that automatically connect to the Internet should connect using:” If the current setting is “My Work Network”, change it to “My ISP” and vice versa
- g. Tap OK in the top right corner.