Local Agency Inventory System

(LAIS)

User Guide

Updated January 2009

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OVERVIEW

That was then and this is now!

In the past, agency staff members have performed inventory tracking through an unreliable paper passing system. This system is inherently prone to inaccurate recording of information along with limited search and reporting capabilities.

The new system called The Local Agency Inventory System, or LAIS, was developed specifically for WIC local agencies. The new computer based system automates business processes related to entering and modifying inventory items for both agencies and WIC property controllers. Simply stated WIC has graduated from “sneakernet” to Internet!

This guide will start with a conceptual explanation of how the inventory tracking system operates followed by detailed tutorials to help operators become familiar with this new system. You will find the application to be very easy to understand and in most cases even self-explanatory. You are encouraged to use this guide as you begin learning the system and then whenever you need additional guidance.

Let’s start by discussing the business process of the inventory tracking system. The basic concept is quite simplistic when broken down conceptually to the four primary tasks:

- **Creating**
- **Updating**
- **Transferring**
- **Disposing**

Creating

Much like patient records in a doctor’s office where information about a specific patient is stored independently from other patients, LAIS must store information about inventory items that have been purchased with USDA funds. The State considers some of this information as trackable and in some cases non-trackable.

It all begins with a new item showing up at an agency’s doorstep. This item can be anything from an auto dialer to a vehicle. Due to the fact that certain rules must be enforced, such as entering a proper device type or serial number, this newly added item must be validated to ensure enough information has been entered to identify the item and the information is accurate. Utilizing the same system, a WIC property controller will review the request and either accept or reject the item. Therefore, there are two roles performed by staff members acting upon each request: staff members entering inventory data (**operators**) and staff members who approve requests (**property controllers**). The tutorials to follow will describe the details of each task and who performs what actions on a request.

Updating

Items that have been approved by the property controllers make their way to the permanent inventory database. Like indelible ink the records created are permanently attached to the database but can be updated if needed. If a request is made to update an item already stored in the database, a copy of the record is transferred to a temporary area while the original is left untouched. Updates made to these items also require approval by the property controllers prior to modifying any original records.

Transferring

Another form of update would be to transfer an item from one agency to another. This type of update simply is a request to change a single piece of information, the owning agency. Like the previously described requests, this request also requires approval by a property controller. You will learn more about this type of request in a later tutorial describing transfer.

Disposing

In certain cases items may be disposed. This is the only task that actually removes a record, therefore, the previous analogy about indelible ink may not be accurate. Not so fast! What if someone requested a report of all items disposed last quarter? If the original records were deleted then we could not generate such a report. Even if the item is approved for disposal, the system still maintains the original record, marked as disposed, in an archive. This type of request simply removes the item from an agency’s permanent inventory list.

That’s it! Those are the four tasks performed to track inventory within the system. The next section will describe the core process from request to approval.

Transactions and Status Codes

Although the next section may seem a little over the top in terms of detail, bear with me for a moment as I ensure you that a better understanding of any application will help you be a better operator.

Let’s say you order something from Amazon.com, in which case you have placed an order and given your personal information, including credit card number. Amazon now begins processing your order in a series of steps starting with checking current inventory followed by checking your available credit on your credit card, and finally sending the order along with your address to the shipping department. You would not consider this transaction complete until you actually receive the item, and neither would Amazon.

Much like the transaction with Amazon, LAIS does not consider a transaction complete until a specific set of rules have been followed. The rules applied to each request form a transaction that guarantees the business process is consistent. There are four transaction types linked directly to the four tasks of Add, Update, Transfer, and Dispose. Upon initiating any request, the system will spawn a transaction which tracks the request throughout its lifetime until all required steps have been completed or the request is cancelled. To track the progress of transactions a status flag is automatically set and updated to indicate the stages of each transaction.

The following is an example of a Create New transaction request. Pay attention to how the status changes from InProgress to Permanent:

Operator request to Add new item
  Transaction = Add
  Status = **InProgress**

Operator completes the data entry and submits request
  Transaction = Add
  Status = **Submitted**

Property Controller reviews request, sees a missing required field serial number and returns with an explanation
  Transaction = Add
  Status = **Returned**

Operator fills in correct serial number and resubmits
  Transaction = Add
  Status = **Submitted**

Property Controller reviews and approves
  Transaction = Add
  Status = **Approved**

System identifies a newly approved item and transfers information to the permanent inventory database.
  Status = **Permanent**

Accessing the Application

LAIS is accessed exactly the same way you enter any website. The string you enter in your browser is called a Uniform Resource Locator (URL). This string is always a unique name for the specific website you want to view. Some URL's that may be familiar to you are http://www.Google.com or http://www.Yahoo.com. In the case of LAIS the URL is http://LAIS.PHFEWIC.org.

Unlike most websites you visit on the World Wide Web, this one is secured. This simply means that you are not allowed access until you have been authenticated. The authentication is handled automatically in the background but you must provide a valid set of credentials. These credentials are in the form of a username and password. If you have not already been assigned a username and password by your supervisor you will need to request these prior to using LAIS. If you have been assigned credentials but forgot your password you may contact the helpdesk at any time to reset your password.

Users are not allowed to share credentials; therefore each user must be assigned a unique set of credentials.

Figure 1

The Home Page

The first screen displayed upon entering LAIS is the home page (Figure 2).

Figure 2

All websites have a home page as a starting point. Most websites will also contain other screens or pages with options on the other pages to return home if needed. Therefore, at any time while using LAIS if you desire to return home you will notice all pages have a home link which can be selected at any time. This link will appear towards the upper right side of each page.

The home page has a friendly caption which reads “Welcome to the Local Agency Inventory System”. If you focus on the left side of this page you will notice a set of links with captions that represent the various types of tasks you will be performing to manage your inventory. In addition to the four primary tasks, you will notice a link for performing searches.

Exiting the Application

Warning: The session does not end until the user logs out properly. A proper logout is performed by selecting the X icon within the shadow toolbar (Figure 2A) located in the upper right corner of the web page (see Page 5 – Figure 2). Closing the browser **WILL NOT** log the user out but will keep the session alive. Three simultaneous logins will deny the fourth login to succeed, therefore, access will be denied. If this occurs, you must either wait one hour for the timeout to expire or call the help desk for assistance.

Figure 2A

TUTORIAL 1

Creating a New Inventory Item

Step 1:

- Select **Inventory Additions – <u>New Addition</u>** (Figure 4.1).

Figure 4.1

This page assumes you want to enter a new item **<u>NOT</u>** update existing items. You will notice this page does not have features to search existing items. If you wish to perform an action on existing items you would have selected a different link from the home page such as Inventory Additions – In Progress. You will see multiple text boxes for entering values for your new item. The text boxes and the values entered represent the fields for each record. Some of the fields allow entering values directly, such as serial number, while others must be selected from a drop-down list. A drop-down list is a pre-populated control which contains only valid values so you will not have to manually type them. This saves time and protects the records from containing invalid data. An example of this type of field is Device Type.

Step 2:

- Enter or select values for your items on this page (Figure 4.2).

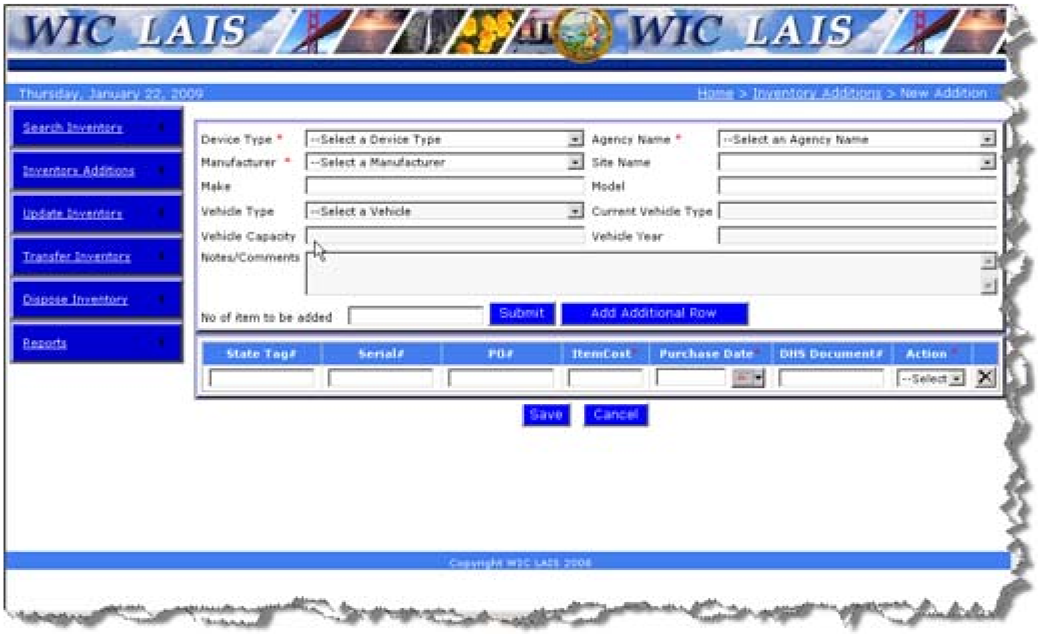

Figure 4.2

If adding multiple items of the same device type, simply enter the number of item's you're adding then select the **Submit** button (Figure 4.3) This will expend the grid to allow entering specific values for each item. You can also use the **Add Additional Row** button.

Figure 4.3

Step 3: **Warning: You must save your work prior to exiting** (Figure 4.4).

- Select an action **Save** or **Submit** from the Action drop-down list for each item. Select the delete button to remove an item.

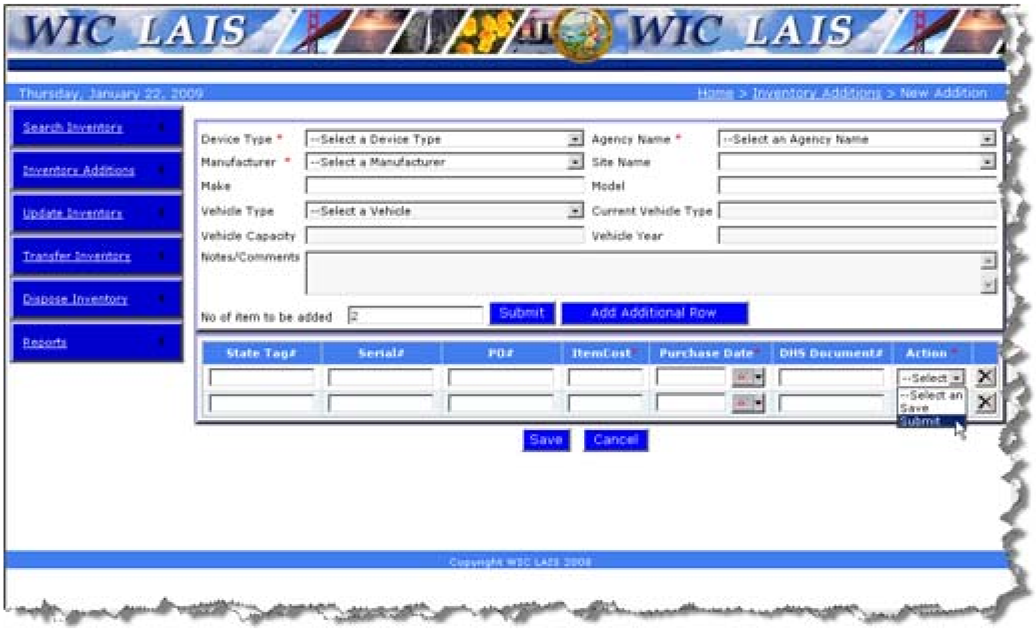

Figure 4.4

Step 4:

- Perform all selected actions by selecting the **Save** button below the grid (Figure 4.5).

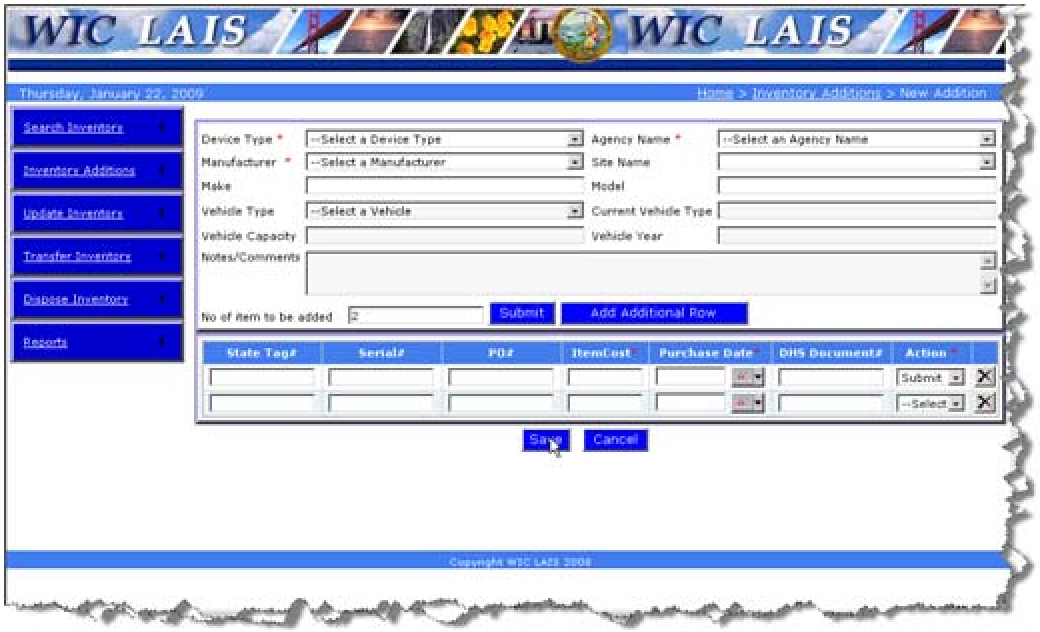

Figure 4.5

TUTORIAL 2

Updating Inventory Items

Step 1:

- Select **Update Inventory – <u>New Update</u>** (Figure 5.1).

Figure 5.1

Updates are made to existing permanent inventory items. The initial Update Inventory page therefore presents a set of search options. If you wish to search all items, simply select the **Search** button without any search criteria. Notice the link beneath the grid (Figure 5.2).

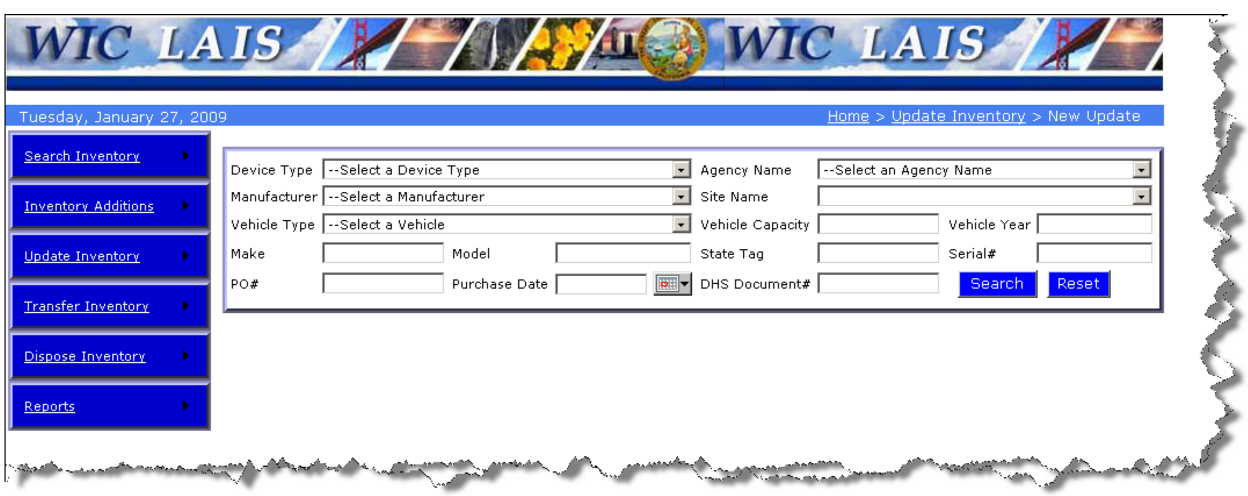

Figure 5.2

Note: Items with 'Pending' under 'Current Transactions' have a current transaction pending for the particular record. Each record can have only one pending transaction at a time. You will notice upon selecting a record with a pending transaction, the background color of these boxes are grey but still show the current values (Figure 5.3).

Figure 5.3

Notice that the ability to select an agency is not available for Local Agency Operators.

Use the + link to the left of the item in the grid. This expands to view additional details of an item. The controls (e.g., text boxes, calendar, and drop-down lists) allow you to make modifications to the current values or enter missing values.

Step 2:

- Select an **Action** on each item (Figure 5.4).

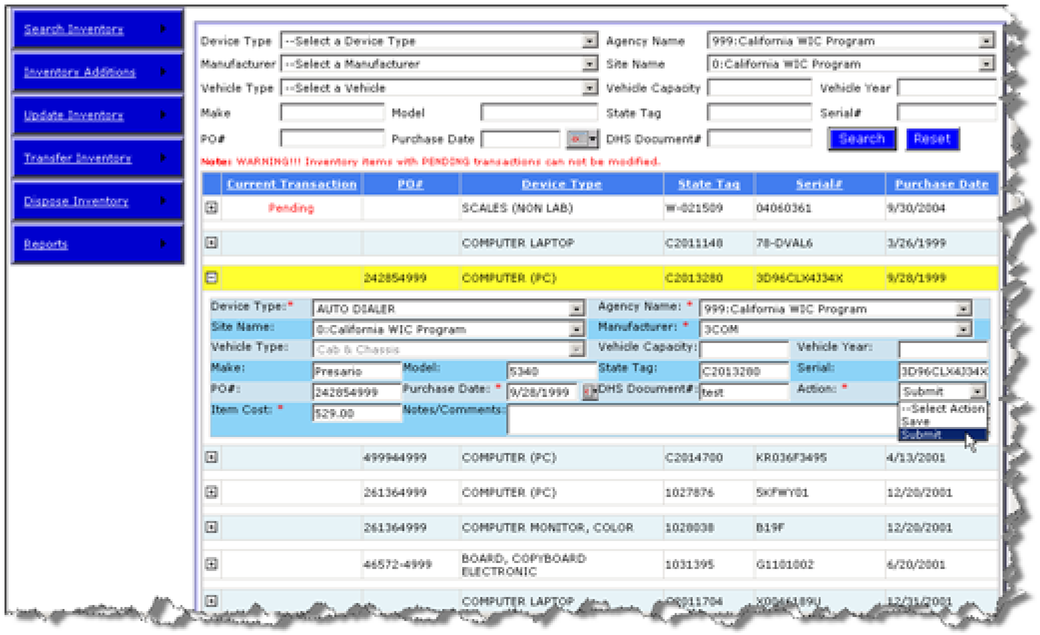

Figure 5.4

Step 3:

- Select **<u>Save</u>** or **<u>Cancel</u>** to execute request (Figure 5.5).

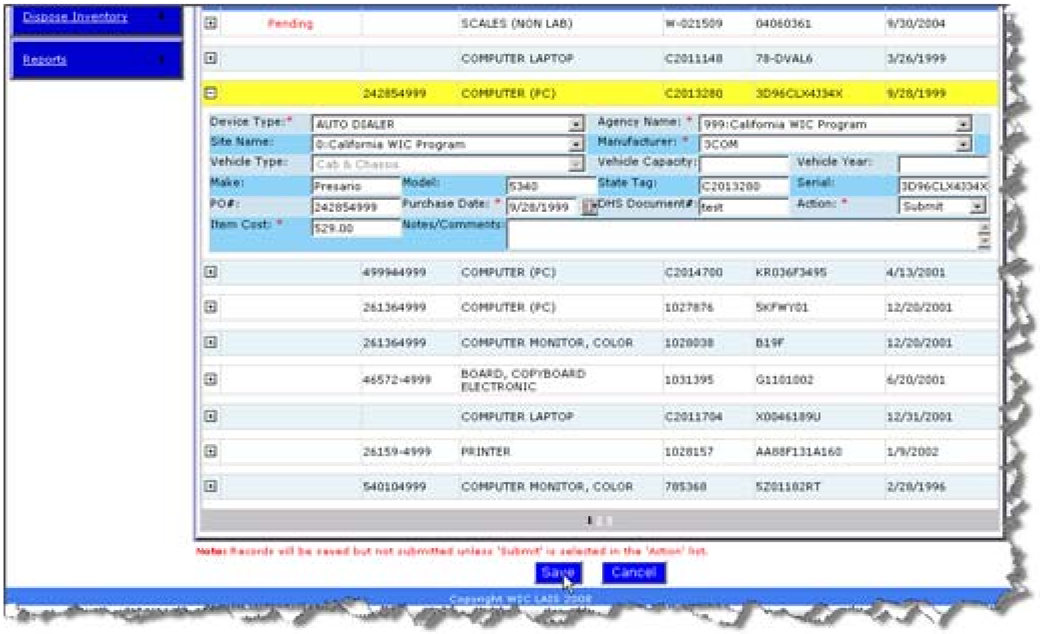

Figure 5.5

This will change the status of the transaction to ‘submitted’ for all items whose action has been set to Submit. The Submit request indicates that an action is pending by a property controller. Be patient when waiting for updates to propagate to the permanent records. These changes are dependent on the response time of the property controller. Due to the fact that a property controller has the authority to return any request, you should make it a habit to periodically check for returned items. You can do this by simply clicking on the **Update Inventory – <u>Returned</u>** link on the home page (Page 16 – Figure 5.6).


WIC LAIS
WIC LAIS
Friday, January 23, 2009
Home
Search Inventory
Inventory Additions
Update Inventory
Transfer Inventory
Dispose Inventory
Reports
New Update
In Progress
Submitted
Returned
Welcome to the
Local Agency Inventory System
~ L A I S ~
Items Available to View/Download...
Local Agency Inventory System User Guide
Contract Management Binder - Chapter 9 - Equipment Management
Copyright WIC LAIS 2008

Figure 5.6

TUTORIAL 3

Transferring Inventory Items

Step 1:

- Select **Transfer Inventory – <u>New Transfer</u>** (Figure 6.1).

Figure 6.1

Since a transfer involves two agencies, the transferring agency and the receiving agency, this transaction includes additional steps. When an agency makes a request to transfer an item to another agency, a property controller may approve the transfer in which case the item will enter an intermediate status of 'In Transit'. The item will remain in this state until the receiving agency accepts the transfer. This acceptance is performed using the **Transfer – <u>In Transit</u>** link from the home page. If the receiving agency decides to reject the transfer (i.e., wrong item) the operator has the option of returning the item.

Step 2:

- Specify search criteria to view specific items (Figure 6.2).

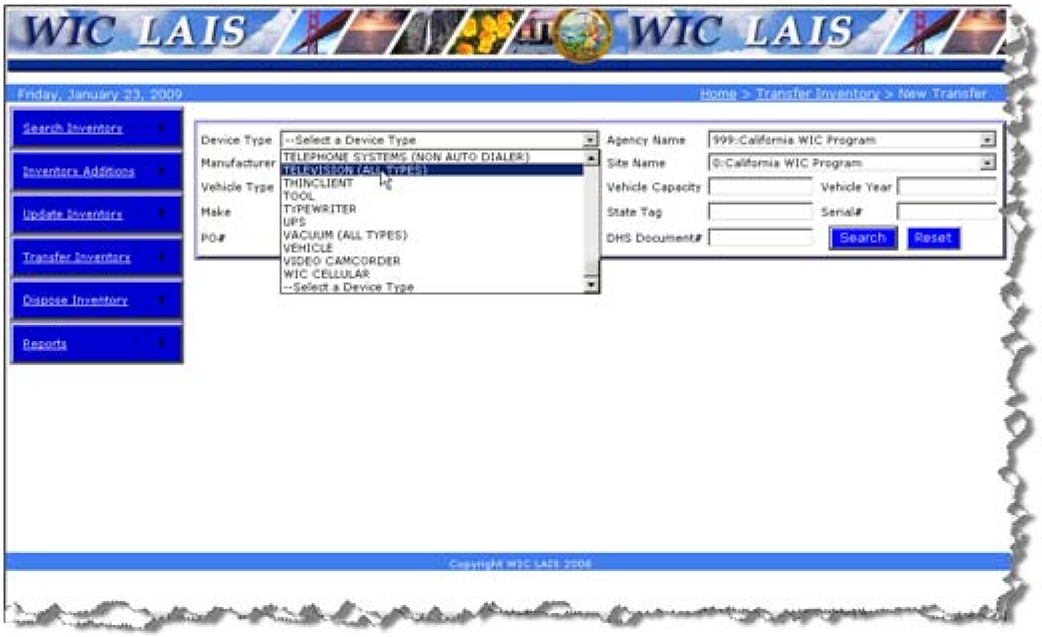

Figure 6.2

Step 3:

- Select items to be transferred by selecting the check box (Figure 6.3).

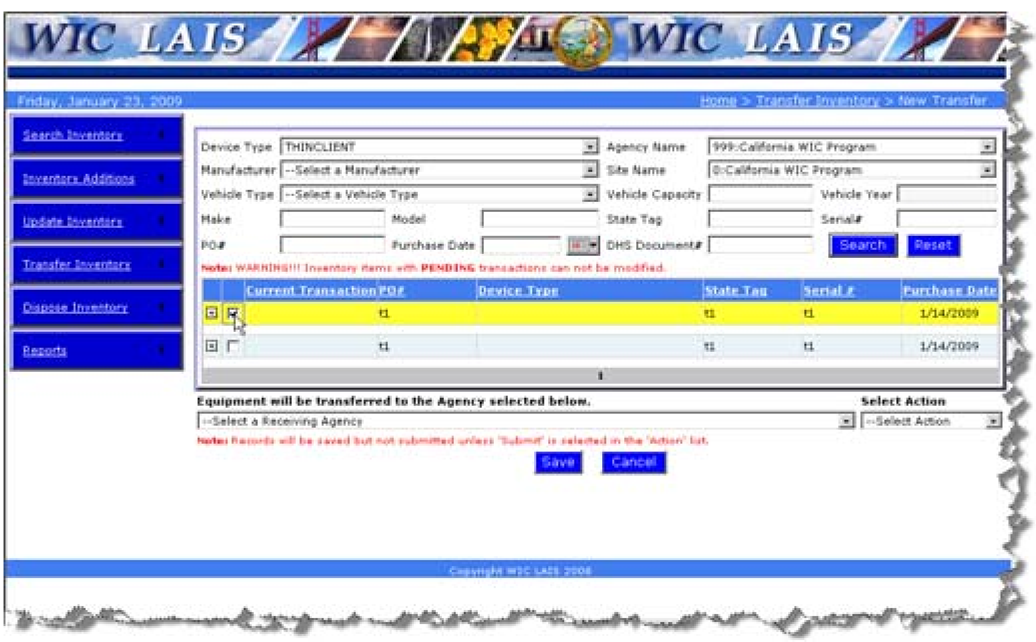

Figure 6.3

Step 4:

- Select from the drop down the receiving agency (Figure 6.4).

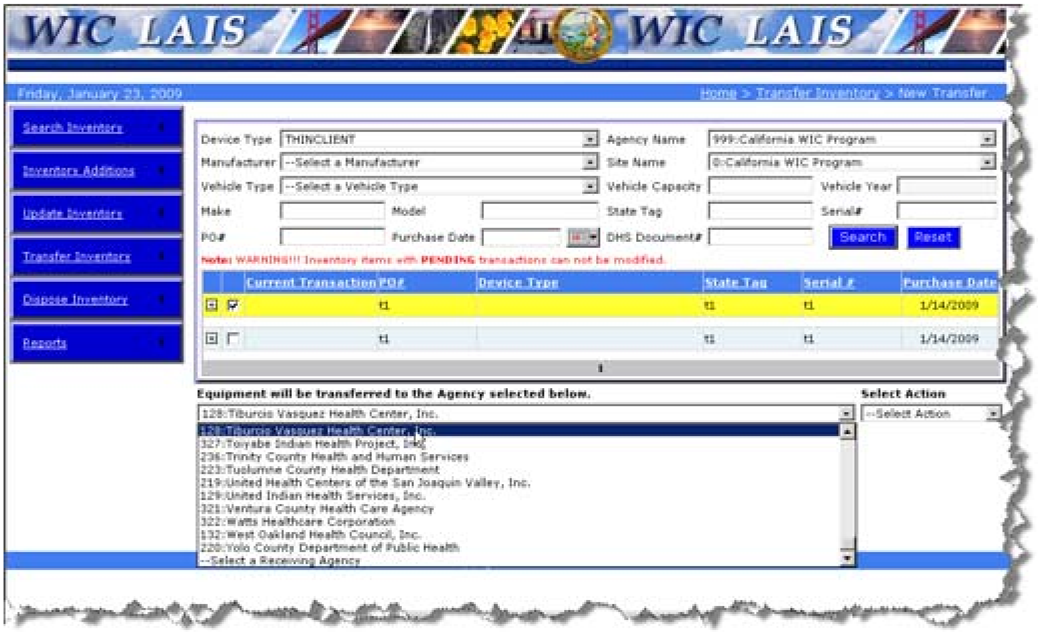

Figure 6.4

Step 5:

- Select an action **Save** or **Submit** (Figure 6.5).

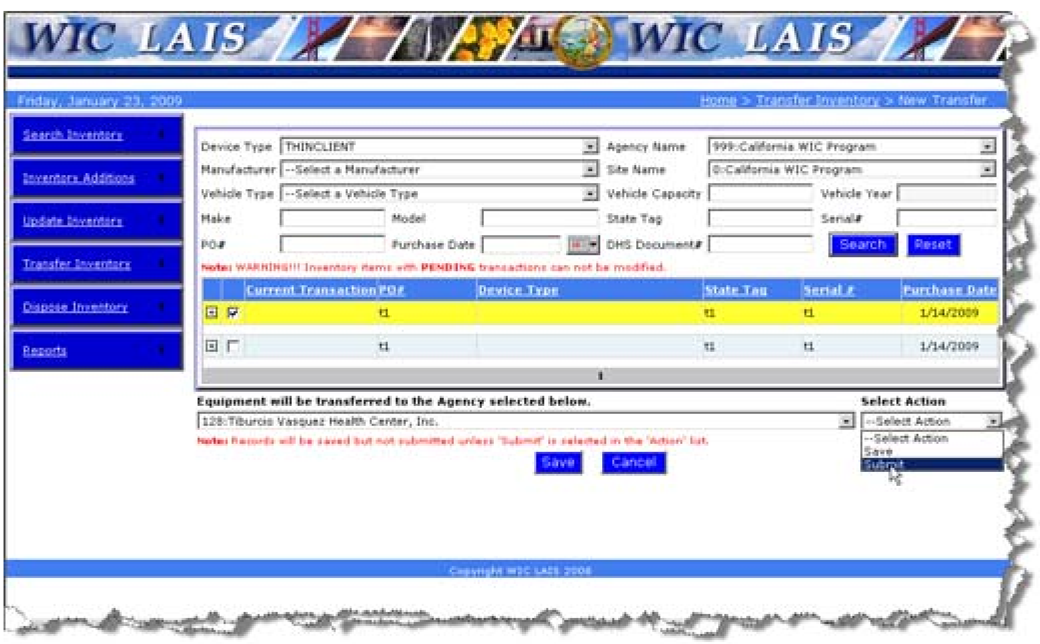

Figure 6.5

Step 6: **Warning:** **You must save your work prior to exiting** (Figure 6.6)

- Click the **Save** or **Cancel** button to complete your request.

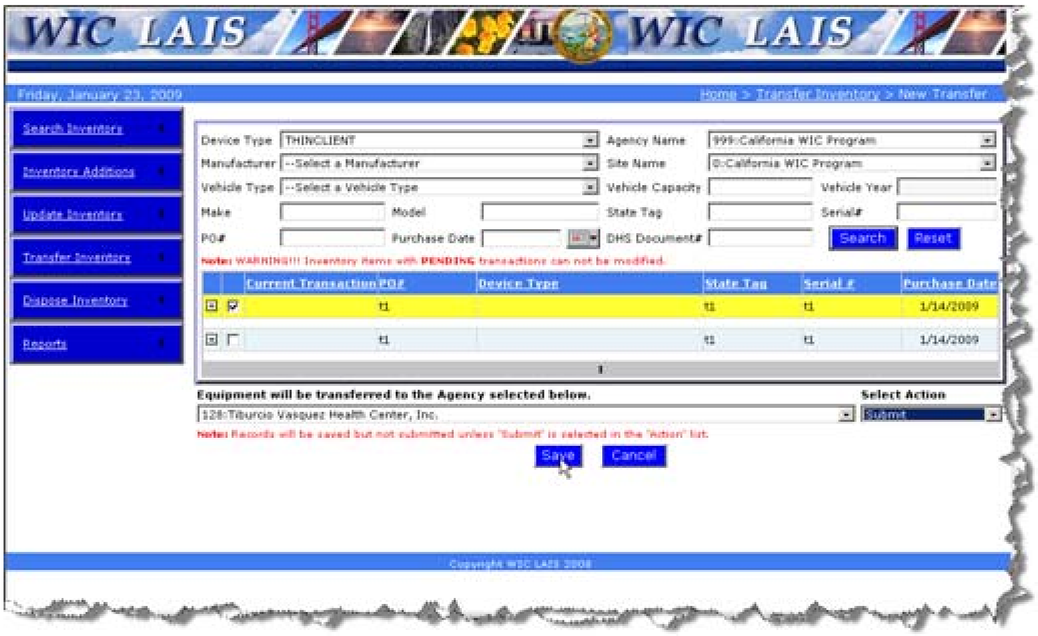

Figure 6.6

The transferring agency must now wait for the property controller to approve the transfer request. As stated earlier, this will change the status of the transaction to InTransit.

The next step is performed by the receiving agency.

Note: *The system enforces a rule that only receiving agencies can receive transferred items. If the transferring agency attempts to also receive the item, the system will not respond to this request.*

Step 7:

- Select **Transfer Inventory – <u>In Transit</u>** (Figure 6.7).

Figure 6.7

Step 8:

- This page will present items that are in transit for your agency. Optionally select search criteria to display specific in transit items (Figure 6.8).

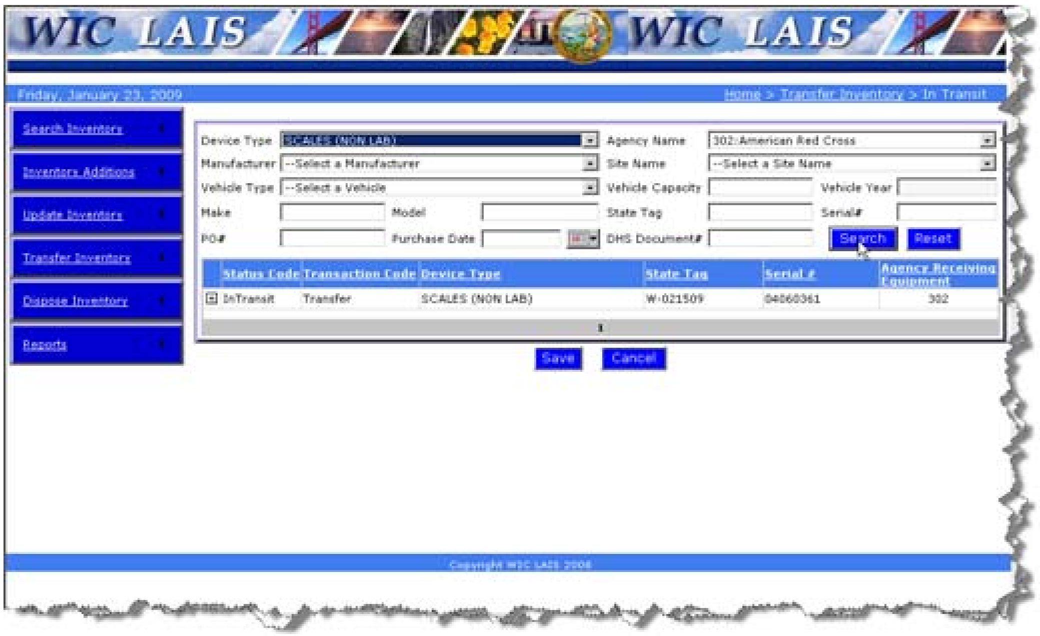

Figure 6.8

Step 9:

- View/collapse the item details by selecting the ± symbol (Figure 6.9).

Figure 6.9

Step 10:

- Select an action **Receive, Return, Withdraw** (Figure 6.10).

Figure 6.10

Step 11: **Warning:** **You must save your work prior to exiting**.

- Select Save or Cancel (Figure 6.11).

Figure 6.11

Note: *You must now await a property controller to review and approve the transfer before it can be viewed in your permanent records.*

TUTORIAL 4

Disposing Inventory Items

This type of transaction has two stages of approval. The first stage of approval is the authorization by a property controller to dispose of an item. The item will then await certification of the physical disposal by an operator. The second stage is the final approval by a property controller to dispose of the item permanently. The property controller will not do a final approval until proper acknowledgment of physical disposal has been satisfied (check with your property controllers for advice on proper procedures).

Step 1:

- Select **Dispose Inventory – <u>New Disposal</u>** (Figure 7.1).

Figure 7.1

Step 2:

- This screen presents options to search your agencies inventory (Figure 7.2).

Figure 7.2

Since you will be requesting modifications to existing inventory items, this step allows you to search on permanent items to be disposed. You will notice on this page you are presented with multiple drop-downs used to select your search criteria (Figure 7.2). The system will react to any search criteria you select, including no selection at all (the default display). If you perform a search with no criteria the system will respond by returning all permanent inventory items. An important point here is operators can only act upon items owned by their respective agency, but property controllers are allowed to act upon any item. If you are an operator, the only items returned by the search are those belonging to your assigned agency. If you are a property controller all items are returned for the specified search criteria.

Since your intention is to dispose of a specific permanent item, you must begin by locating that item from the permanent inventory. Use the text boxes or drop-down list(s) to refine your search.

Step 3:

- Click the ± sign to the left of the item to view\collapse details (Figure 7.3).

Figure 7.3

Step 4:

- Select a disposition code and disposition explanation (Figure 7.4).

  With the item selected you will notice a drop-down list at the bottom of the page that contains options to select a disposition code and a text box to enter an explanation for the disposition (Figure 7.4).

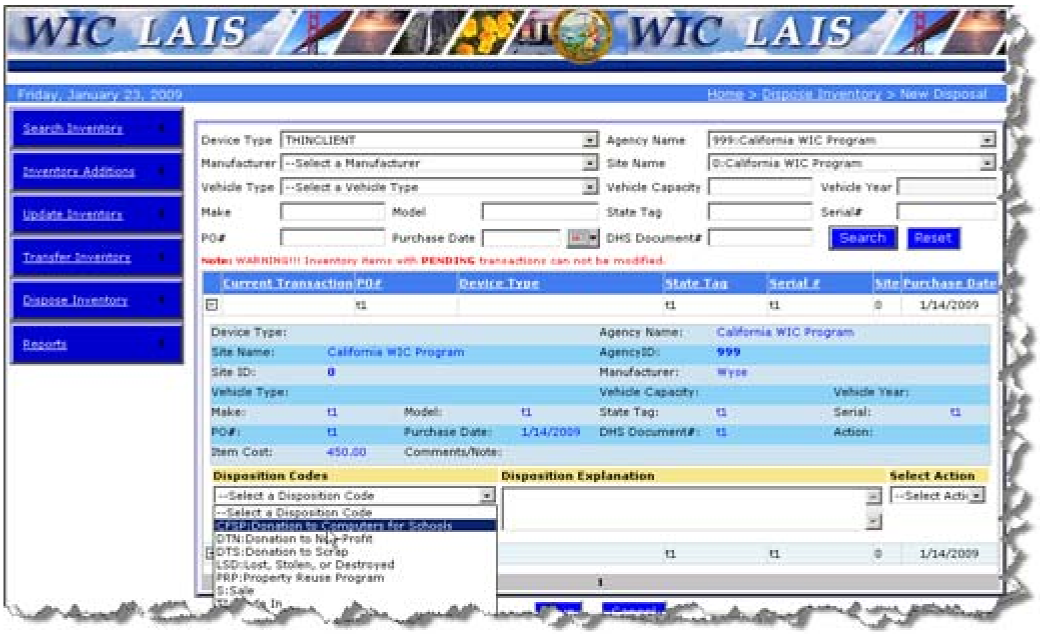

Figure 7.4

Step 5: **Warning: <u>You must save your work prior to exiting</u>** (Figure 7.5).

- Select an action **<u>Save</u>** or **<u>Submit</u>** from the drop-down list.

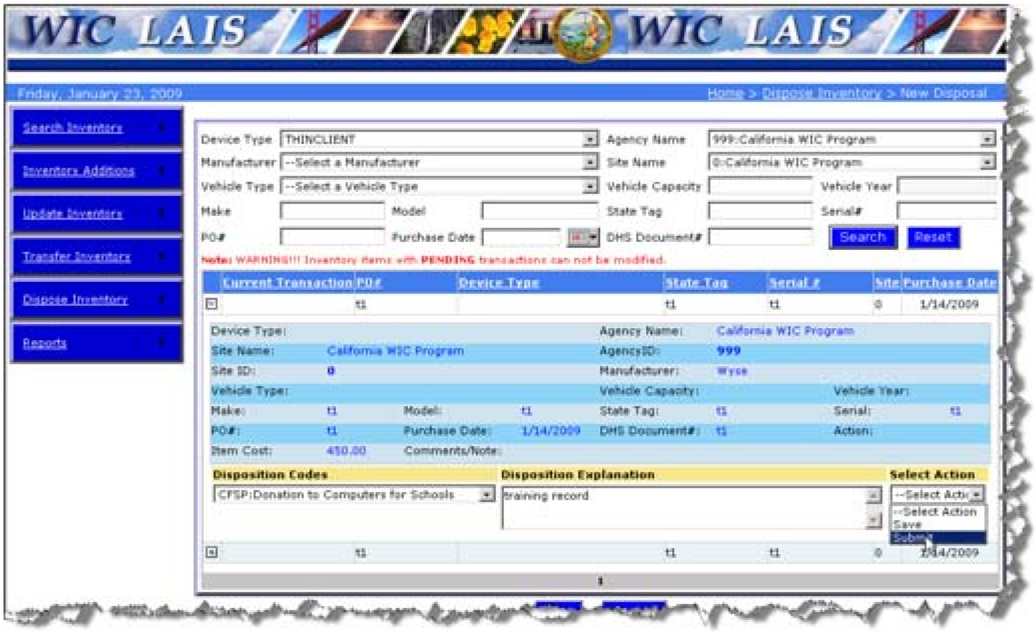

Figure 7.5

Step 6:

- Select **Save** or **Cancel** to complete request (Figure 7.6).

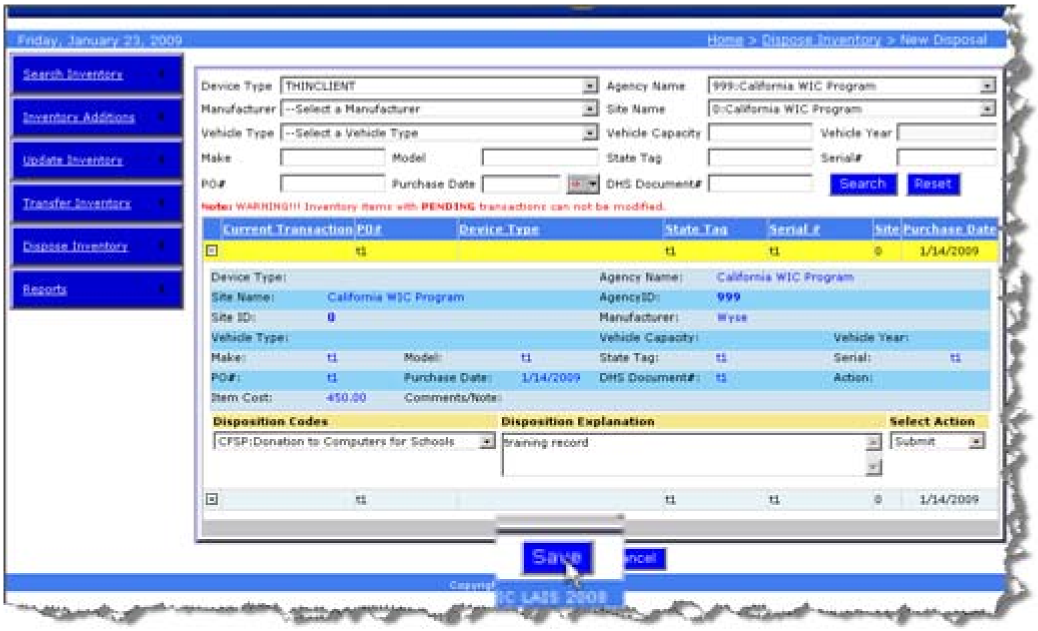

Figure 7.6

Note: *You must now wait for a property controller to review and either accept or reject your request. If accepted the status will be set to PreCertified. This is an intermediate status in which the item is pending physical disposal. After the item is properly disposed of the requesting agency needs to certify the disposal. You can view the submitted items from the 'Dispose Inventory – Submitted page (Figure 7.7) however, no transactions can be made on this page. Let's continue with the process.*

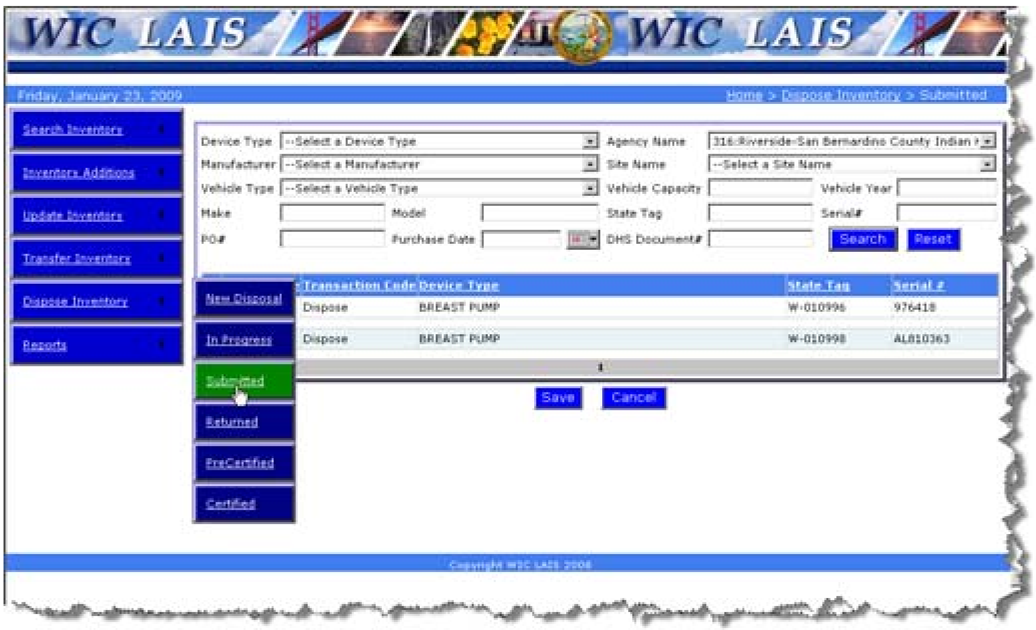

Figure 7.7

Step 8:

- Select **Dispose Inventory – <u>PreCertified</u>** (Figure 7.8).

Figure 7.8

Step 9:

On this page you are presented with multiple drop-downs used to select your search criteria. If you would like to view all PreCertified items, simply select the Search button without and criteria (Figure 7.9).

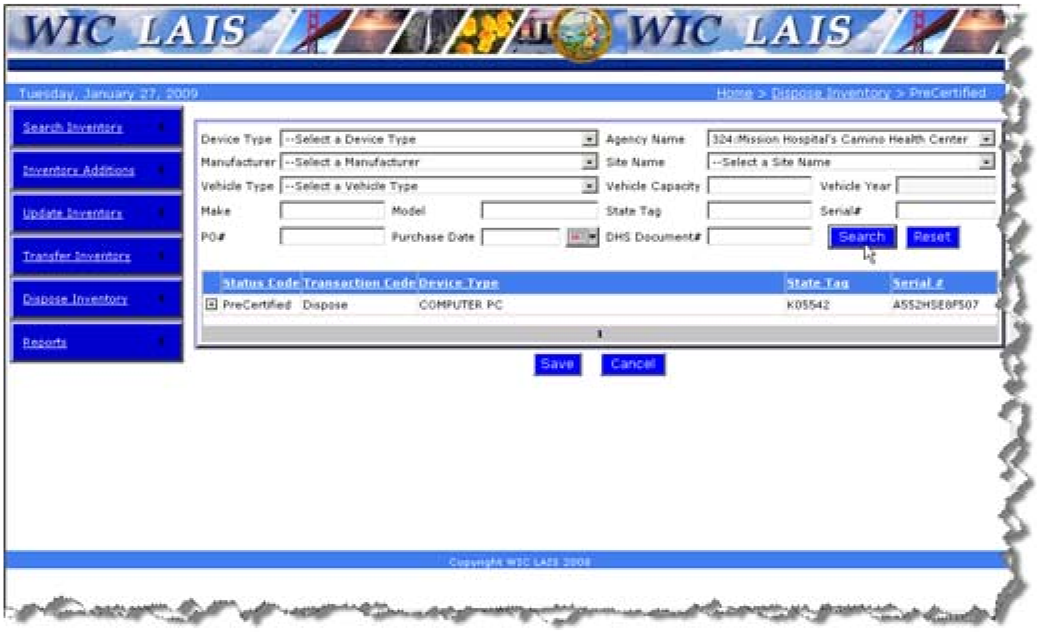

Figure 7.9

Step 10: Certify the dispose request.

- Click the ± symbol to the right of the item in the grid to expand\collapse the details and assign an action.
- Using the drop down, select the appropriate action for the item. The available actions include Certify or Withdraw (Figure 7.10).

Figure 7.10

Note: *Selecting the 'Withdraw' action during any transaction will display the following warning. Withdrawing a transaction will delete the temporary record, however, the permanent record remains in the original state. (Figure 7.10A)*

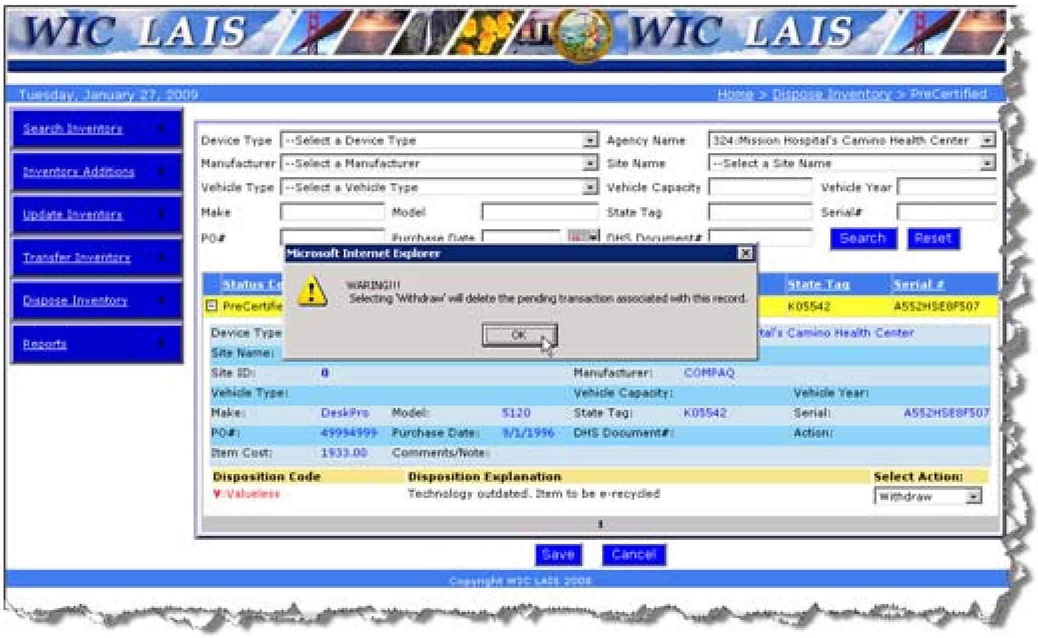

Figure 7.10A

Step 11:

- After selecting an action click the Save button to complete the request (Figure 7.11).

Figure 7.11

Note: *The property controllers can now perform the final approval of your request. This will approve the disposal and permanently remove the item from your inventory.*

Contact Information

Email: TSULEAD@CDPH.CA.GOV

Telephone: 1-800-224-7472