

PSTRAX SUCCESS GUIDE: SUPPLIES MODULE

These checklists are designed to help you implement PSTRax successfully, from initial setup to full deployment. Remember that we're here every step of the way, so feel free to reach out with any questions or adjustments.

» PHASE I: Review & Fine-Tune the System

- ☐ **Complete admin training.** Go to **Help > Admin Training > Supplies Module Training** to explore admin training tutorials. Or sign up for one of our weekly webinars [here](#).
- ☐ **Verify supply items.** Go to **Settings > Supplies > Manage Items** to view, edit, and add supplies to your library. Remove any duplicate items if there are any, as that can lead to reporting discrepancies. Determine which items should require an expiration date and/or lot number. [Learn more](#).
- ☐ **Build out a supply closet container.** In **Settings > Supplies > Manage Containers**, add one container for your supply closet. Add sub-containers if applicable (shelves, bins, etc.) by clicking **Actions > Manage Sub-Containers**. Then assign items individually from the Manage Containers page (**Actions > Assign Items**) or in bulk from the Manage Items page (**Batch > Assign Items**). [Learn more](#).
- ☐ **Log an inventory count.** Click **Perform Supplies Check** from the Station Home screen. Select Inventory Count from the **Check Type** dropdown and your supply closet from the **Container** dropdown. Select which items to count and then input the quantity on hand (QOH) and exp. dates / lot numbers. Note any adjustments (missing items, min/max quantities, etc.) that need to be made. [Learn more](#).
- ☐ **Build out more containers.** Add more supply closets or other containers on the **Manage Containers** page. If you have containers that are the same, build one out first and then duplicate it (**Actions > Duplicate Container**). We highly recommend setting up just your supply closets to start, assuming you reorder supplies based on the levels in the closets. [Learn more](#).
- ☐ **Set up intervals and due dates.** On the **Manage Containers** page, click the link in the **Interval** column and set your interval. Click the link in the **Next Due** column to set your start date. [Learn more](#).
- ☐ **Set up alert recipients.** Alert recipients can be set by container to ensure that appropriate users receive notifications when issues arise. Go to **Settings > Supplies > Alert Recipients** to set up. [Learn more](#).
- ☐ **Review user roles & permissions.** You can adjust what certain users can do in the Supplies module with custom roles and permissions (**Settings > Supplies > Roles & Capabilities**). [Learn more](#).

- ☐ **Review best practices.** Don't reinvent the wheel! Check out our Knowledge Base to see how other organizations are using PSTrax to track their supply checks. [Learn more.](#)
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» PHASE II: Roll-Out to Your Crews

- ☐ **Verify user access.** Go to your **Settings > Personnel > User List** to make sure all users who should have access to the Supplies module are listed in PSTrax, and have the correct [permission levels](#).
- ☐ **Send login information to users.** You should have received username and password information from your Build Manager, but you can access it again from the **User List**. Pass this along to each user when you're ready to have them access the system.
- ☐ **Provide training materials to users.** Once they log into PSTrax, have users go through a step-by-step training checklist to learn the module in detail (**Help > User Training > Supplies User**). You can also post our [Supplies User Training Videos](#) into your training platform ahead of time.
- ☐ **Have users log events.** Allow a handful of users to log a test Inventory Count, Usage, or other applicable events on a supplies container to identify items that need to be modified. Any adjustments should be passed along to a Supplies Admin to review.
- ☐ **Make adjustments.** After identifying the necessary adjustments, make the corrections yourself (if you feel comfortable), or collaborate with your Build Manager to facilitate the necessary changes. Note that you may require multiple rounds of adjustments as you get input from more users.

» PHASE III: Go-Live with PSTrax

- ☐ **Pick a day to go-live.** It's helpful if you let us know what date you choose at least a few days in advance so we can prep on our end. Note that you **DO NOT** have to go live with all modules at the same time. Some agencies prefer to roll-out the modules in phases.
- ☐ **Clear out test data & reset schedules.** We'll help you delete your test logs and alerts, if applicable. None of the settings changes you've made (container or item adjustments, etc.) will be affected. Your schedules can be reset to start on or after your go-live date.
- ☐ **Take an initial inventory.** We highly recommend taking logging an initial Inventory Count event on each supplies container via the as-needed check. This allows you to select a group of items at a time

and input quantities, expiration dates, and lot numbers. Since this process can take some time – and the system can time out if checks aren't logged periodically – it's a good idea to establish your baseline inventories using this method. [Learn more](#).