Inventory Setup

Panorama: Add Lot Number

Purpose

The purpose of this exercise is to add a new lot number to Panorama.

Scenario

SDCL has received a shipment of products and one of the items has a lot number not yet recorded in Panorama. The user in this scenario will add the lot number to Panorama so the product can be received.

Steps are:

- Search for a Lot Number
- If the Lot Number is found -> review information and update if necessary
- If The Lot Number is not found -> create a new one
  - Add new lot number
  - Add expiry date for the lot
  - Save

Data required to add a Lot Number:

- Catalogue name of the product
- Lot Number and Expiry Date

Related Policies

Add New Lot Number - Steps

Step	Action/description	Expected Outcome
1	Log into Panorama.	
	Open browser and enter URL: • Prod: https://services.ehealthsask.ca/panorama/SecurityWeb/Portal Enter username and password Click the **Ok** button Select Role (if applicable) Click the **Continue** button *Note: The role selection option is only available to users with multiple roles*	User is logged into Panorama and at the splash page.
2	Navigate to Inventory component.	
	From the top navigation bar click **Inventory**	The Catalogue Item Information screen is displayed.
3	Navigate to Inventory Setup	
	Click on the **Inventory Setup** link on the left hand navigation bar	Menu is expanded and sub menus visible
4	Navigate to the Product lot screen	
	Click on the **Product Lot** link on the left hand navigation bar	Product Lot screen is displayed
5	Search For Lot Number	
	Important: Search for the lot number before adding a catalogue item. This is done to ensure the lot number is not already in the system incorrectly assigned to the wrong product. 5.1 Enter the new lot number in the Lot Number text box 5.2 Click the **Search** button • If the lot number is found and is on the wrong product stop here and call Vincent • If the lot number is not found continue to step 6	Search is performed to confirm the lot number is not already in the system
6	Add the Catalogue Item the new lot number is for	
	6.1 click on the **Search Catalogue** link	User is returned to the

Step	Action/description	Expected Outcome
	6.2 On the Catalogue Item Information screen search for and select the item you want to record the new lot number for by checking the box on the left of the item 6.3 Click the **Add Catalogue Item(s)** button at the bottom of the screen *Note: You should now have the item in context and the lot number you searched for should still be in the Lot Number text box. If the lot number was cleared out please re-enter it*	Product Lot screen with the item in context
7	Add the lot number to the system	
	7.1 Click the **Add New Product** Lot button 7.2 Enter the new lot number 7.3 Enter the Current Expiry Date 7.4 Lot Status should already be set to **Active** 7.5 Enter a Comment if you want (not required) - If you enter a comment you have to click the **Add** button to add the comment to the table 7.6 Click the **Save** button - Check for messages at the top of the screen. If everything went as expected you should see the "Product Lot was successfully saved" message	New lot number is added to system

Using Product Lots

The Product Lot - Product Lot Search screen allows authorized users to locate a product lot by searching for a product lot number or catalogue item.

Lot information is captured when catalogue items are received from supplier/manufacturers as part of the Product Delivery Request (PDR) or requisition processes supporting movement of inventory among Holding Point Locations (HPLs). Lot information is displayed to users administering immunizations or drugs, and is used to support recall, adverse events, and adverse storage condition management.

Searching Product Lots

You can locate a product lot by searching for a lot number or catalogue item. From the search results, you can update or add lot information. New lots can be added once prerequisite information (e.g. catalogue item) has been added.

To search by product lot number

1. From the Lot Number field, enter the lot number you want to search.
2. Click the **Search** button.

   The Product Lots that match the search criteria are displayed in the Product Lots Search Results section.

To search by catalogue item

1. To select a catalogue item, click the Search Catalogue hyperlink.
2. The Catalogue Item Information screen is displayed. For details, see Using the Catalogue Item Information Screen.
3. Optionally, select a Lot Number.
4. Click the **Search** button.

   The Product Lots that match the search criteria are displayed in the Product Lots Search Results section.

Viewing Product Lot Details

You can view product lot details in the View Product Lot Details screen.

To view product lot details

1. In the Product Lot Search Results section, click the appropriate **Lot Number** hyperlink.

   The **Maintain Product Lot** screen displays the selected product lot and its associated details. This screen is read only. For details, see **Using the Maintain Product Lot** Screen.

Updating Product Lots

Editing a Product Lot

To edit a product lot, you must first select the lot in the Search screen. Once selected, you can extend or shorten the expiry date or inactivate the lot record if created in error.

You can create or edit a product lot in the Create/Edit Product Lot screen. Sublots can be created in the event of a cold chain break or a repackaged product.

To update a product lot

1. In the Product Lot Search Results section, select the check box next to the lot you want to edit.

   Note: Only one lot item can be selected for updating.

2. Click the **Update Product Lot** button.

   The Maintain Product Lot screen is displayed. For details on updating product lots, see Using the Maintain Product Lot Screen.

3. Perform one or more of the following procedures:

   - Extend or shorten the current expiry date for the lot.
   - Inactivate a lot record created in error.
   - Activate a previously inactivated lot record.

To extend or shorten the expiry date (based upon manufacturer instruction)

1. Update the Current Expiry Date field.
2. Optionally, attach a document. See **Adding Attachments**.
3. Click the **Save** button.

The Maintain Product Lot screen is updated.

To inactivate a lot record

1. From the Lot Status drop-down list, select "Inactive".
2. Optionally, attach a document. See **Adding Attachments**.
3. Click the **Save** button.

If products are in the system for that lot, the system displays an error message indicating the lot cannot be deactivated.

Otherwise, the Save function is completed and the Maintain Product Lot screen is updated with the status changed to Inactive.

To activate an inactive lot record

You can activate a lot record that was previously inactive.

1. From the Lot Status drop-down list, select "Active".
2. Optionally, attach a document. See **Adding Attachments**.
3. Click the **Save** button.

   A confirmation prompt appears.

4. Click the **OK** button.

The Maintain Product Lot screen is updated with the status changed to Active.

Creating Product Lots and Sublots

You can create a new product lot for a catalogue item. Sublots can be created in the event of a cold chain break or a repackaged product.

Note: You must perform a search prior to adding the new lot to ensure duplication does not occur.

To add a product lot

1. Perform a catalogue item search to locate the catalogue item on which to base the product lot. See **Searching Product Lots**.
2. Click the **Add New Product Lot** button.

   The Maintain Product Lot - Create/Edit Product Lot screen is displayed with the catalogue item selected and its associated data elements.

3. Enter the following lot information:
   - Lot Number
   - Current Expiry Date
   - Lot Status (defaults to Active if no selection is made)
4. Click the **Save** button.

   The product lot is saved and you remain on the Maintain Product Lot - Create/Edit Product Lot screen showing a successful confirmation message.

To create a sublot for a cold chain break

1. From the search screen results, select the check box next to the lot number for which you want to create a sublot.
2. Click the **Create Cold Chain Sublot** button.

   The Maintain Product Lot - Create/Edit Product Lot screen is displayed with the Lot Type defaulted to Cold-Chain. The Lot # field is populated with a system generated lot number consisting of the selected lot # from the search results and the suffix with the next incremental cold chain sublot suffix for the specified lot.

3. In the Current Expiry Date field, enter the date for the new lot if necessary.
4. From the Lot Status drop-down list, select the status.
5. Click the **Save** button.

   The product lot is saved and you remain on the Maintain Product Lot - Create/Edit Product Lot screen showing a successful confirmation message.

To create a sublot for a repackaged product

1. From the search screen results, select the check box next to the lot number for which you want to create a sublot.
2. Click the **Create New Repackaged Sublot** button.

The Maintain Product Lot - Create/Edit Product Lot screen is displayed with the Lot Type defaulted to Repackaged-Lot. The Lot # field is populated with a system generated lot number consisting of the selected lot # from the search results and the suffix with the next incremental repackaged sublot suffix for the specified lot.

3. In the Current Expiry Date field, enter the date for the new lot if necessary.
4. From the Lot Status drop-down list, select the status.
5. Click the **Save** button.

The product lot is saved and you remain on the Maintain Product Lot - Create/Edit Product Lot screen showing a successful confirmation message.

To add comments to a Product Lot

1. Enter comments as required in the Comment text box and click the **Add** button.

The comment along with the current date and the user who added it are displayed in the Comments table.

Adding Attachments

You can attach a document to a product lot on the Maintain Product Lot - Create/Edit Product Lot screen.

Note: You can only attach documents when updating a Product Lot.

To attach a document

1. Click the **Attach Document** button.

The Document Management screen is displayed. For further information on Document Management, see Using the Document Management Screen.

Viewing Product Lot History

You can view the history of a product lot from the Maintain Product Lot - Create/Edit Product Lot screen.

To view the history of a product lot

1. Click the **View History** button.

   The Product Lot - View product Lot History screen is displayed.

   Note: If attachments or documents exist for the product lot, the corresponding button is enabled in the View Product Lot History section.

To view the attachments for a product lot

1. Click the **Attachments** button.

   The Document Management screen is displayed. For further information on Document Management, see Using the Document Management Screen.

To close the Product Lot - View Product Lot History screen

1. Click the **Close** button.

   The Maintain Product Lot screen is displayed.

Printing Product Lot Details

When a product lot is displayed on the Maintain Product Lot - Create/Edit Product Lot screen, you can print product lot details.

To print the details for a product lot

1. Click the **Print Lot Details** button.

   A print-friendly version of the Maintain Product Lot screen is displayed in a separate window ready for printing.

Cancelling from the Maintain Product Lot Screen

You can cancel changes that have been made but have not yet been saved.

To cancel changes

1. Click the **Cancel** button.

    A confirmation prompt appears.

2. Click the **OK** button.

    The data is cleared from the screen and the Product Lot screen is displayed.

Printing Product Lot Information

You can print the Product Lot or Maintain Product Lot screen.

To print product lot information

1. Click the **Print** icon, on the top right hand corner of the screen.