

## Inventory Maintenance

### Move Inventory

#### Purpose

The purpose of this exercise is to describe the required steps in Panorama to move inventory items from one holding point location (HPL) to another HPL. The move functionality cannot be used to move product between to Holding Points and can only be used to move product between two Holding Point Locations within a single Holding Point.

#### Scenario

User wants to move product from one Holding Point Location to another

#### Steps are:

- Select the HP and HPL
- Select the product to move
- Enter quantity to move
- Select the HPL the product is moving to
- Save the move

#### Data required to move product

- What product to move
- Which HPL the product is being moved from and the HPL the product is being move to
- The reason for the move

#### Related Policies

## Move Product - Steps

Step	Action	Description	Expected Outcome
1	Log into Panorama.		
	1.1 Open a browser and navigate to the Production Environment URL: <a href="https://services.ehealthsask.ca/panorama/SecurityWeb/Portal">https://services.ehealthsask.ca/panorama/SecurityWeb/Portal</a> 1.2 Enter your username and password 1.3 Click the <b>Ok</b> button 1.4 Select Role (if applicable) 1.5 Click the <b>Continue</b> button  <i>Note: The role selection option is only available to users with multiple roles</i>		User is logged into Panorama and at the splash page.
2	Navigate to Inventory component.		
	From the top navigation bar click <b>Inventory</b>		Catalogue Item Information screen is displayed.
3	Expand the Inventory Maintenance menu		
	Click on <b>Inventory Maintenance</b> on the left hand navigation bar		Menu is expanded and sub menus displayed
4	Navigate to the Move Inventory t screen		
	Click the <b>Move Inventory</b> link in the left hand navigation menu in the Inventory Maintenance section		Move Inventory Items within a Hold Point screen is displayed
5	Select the Holding Point the move is for		
	5.1 Click the <b>Add Holding Point</b> Link 5.2 Enter search criteria <ul style="list-style-type: none"> <li>• HP Type: <b>Public Health Office</b></li> </ul> 5.3 Click the <b>Search</b> button 5.4 Check the box to the left of the Holding Point you want 5.5 Click the <b>Add Holding Points</b> button		Holding Point is added
6	Select the Holding Point Location that has the product that needs moving		
	Select the Holding Point Location you want to move the product from by selecting it from the <b>From Holding Point Location</b> drop down menu		HPL is selected
7	Add the catalogue item to be moved		
	7.1 Click the <b>Search Catalogue</b> Link		Catalogue Item is

Step	Action	Description	Expected Outcome
7.2	Click the Search button	7.3 Check the boxes to the left item you want to move 7.4 Click the <b>Add Catalogue Item(s)</b> button	selected and user returned to the Move screen
<p><i>Note: There are several ways to search the catalogue that will narrow down the items displayed to select from. This step returns all the items in the catalogue</i></p>			
8	Move the item to a different Holding Point Location		
8.1	Click the <b>New Move</b> button	8.2 Check the box beside the item you want to move <ul style="list-style-type: none"> <li>• Enables the other fields</li> </ul> 8.3 In the <b>From Holding Point Location</b> menu select the HPL you want to move the product too 8.4 In the <b>Reason for Move</b> menu select a reason for the move 8.5 Enter the <b>QTY to Move</b> in the text box 8.6 Click the <b>Move Items</b> button 8.7 Click the <b>Save</b> button	
<p><i>Note: User can enter a comment if they want</i></p>			
<b>End</b>			