Inventory Maintenance
Step 2 Complete Physical Count

Purpose

This guide covers the required steps to complete a **Physical Count** of all items in one Holding Point Location. This guide also includes the required steps to add missing items to the count.

Additional Notes:

The Physical Count is managed in 2 steps – This guide is for **step 2 Completing a Physical Count.**

This guide assumes you have completed Step 1 **Panorama Maintenance Physical Count Step 1 Set up Physical Count.**

Dependencies

User has completed **Panorama Maintenance Physical Count Step 1 Set up Physical Count**

Steps

- Logon to Panorama, search for and select the count (created in **Step 1**)
- Enter the quantity on hand
- Complete the count

Before you begin

- You must have a count setup in Panorama (step 1)
- Have the items counted and documented on a Count Sheet

Important Note:

You must complete the steps all the way to clicking the **Count is Complete** button in step 12. The numbers in the holding point are not adjusted until the count is complete.

Step	Description	Expected Outcome
1	**Log into Panorama.**	
1.1 Open browser navigate to URL: Production https://services.ehealthsask.ca/panorama/SecurityWeb/Portal 1.2 Enter username and password: Your IDM credentials 1.3 Click the **Ok** button 1.4 Select Role (if applicable) 1.5 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 the Inventory component.**	
2.1 On the top navigation bar click **Inventory**	Catalogue Item Information screen
3	**Expand the Inventory Maintenance menu**	
3.1 Click on **Inventory Maintenance** link on the left hand navigation menu (if it is not already expanded)	Menu is expanded, sub menu's displayed
4	**Expand the Physical Inventory menu**	
4.1 Click on **Physical Count** link on the left hand navigation menu	Menu is expanded, sub menu's displayed
5	**Navigate to the Manage Count screen**	
5.1 Click the **Manage Count** link on the left hand navigation menu	Physical Inventory Count screen is displayed
6	**Find the count being completed (Count was setup using step guide 1)**	

If you know the count number (located on the physical count sheet)
 	
Physical Count Sheet
 	
Count Number 20004154
 	
6.1 Enter the count number in the Count Number text box
6.2 Click the Search button.
 	
If you don't know the count number
6.1 Click the **Clear** button
6.2 Add your Holding Point
    6.2.1 Click the **Add Holding Point** link
    6.2.2 Select **Public Health Office** for the **HP Type**
    6.2.3 Click the **Search** button
    6.2.4 Select your Holding Point by checking the box beside it
    6.2.5 Click the **Add Holding Point** button
6.3 Set **Count Status** to **Active**
6.4 Click the **Search** button
	Search criteria is entered
	
	HP is selected
	
	Search results are displayed

7	**Select the Count you are completing**	
7.1 From the list of counts returned in the search check the box beside the Count you are completing by checking the box for that line	

Step	Description	Expected Outcome
7.2 Click the **Enter Physical Count Data** button		
8	**Enter the Quantity on Hand (QoH) from the Count Sheets into Panorama and Save**	
8.1 Enter your counts in the **Physical Count** column **IMPORTANT NOTE:** If each lot number is displayed twice delete the count and start over or you potentially wipe out all the stock in the holding point		
9	**Add missing items** (Optional - Skip this step if you have no missing items to add)	
9.1 Click the **Add Catalogue item** button (near bottom of screen) On the next screen select the Holding Point Location you want to put the missing item in (select the HPL with the .A) 9.2 Click the **Search Catalogue Item** 9.3 Check the box beside the vaccine you want to add 9.4 Click the **Add Catalogue Item(s)** button 9.5 Select the Lot Number you are missing 9.6 Enter the Quantity Counted (missing lot number quantity) 9.7 Click the Add Item to Count button	Items and quantity are added to the count
10	**Save the count**	
10.1 Click the **Save Count** button **IMORTANT Note:** You **must** carry on through the rest of the steps to complete the count, saving the count will not update the QoH in the holding point		
11	**Print Variance Report** (Do not have to run or print the report but must carry through the following steps to get to the **Complete Count** button)	
11.1 Click the **Process Variance Report** button If you want to run and print the variance report follow these steps. If you don't want the variance report continue at Step 12 11.2 Click the **Create Variance Report** button 11.3 Click the **Open** button on the window that pops up 11.4 Print the report if you want a hard copy 11.5 Close the report window and stay on the Reconcile Variance Parameters screen *Note: You do not have to view or print the Variance report but you do have to follow the above path to get to the Count is Complete button*		
12	**Completing the Count**	
12.1 Click the **Recount** button 12.2 Click the **Count is Complete** button		

Step	Description	Expected Outcome
	Count is now complete	