

# Inventory Maintenance

## Physical Count Cleanup

### Purpose

This guide covers the steps required to find and remove old active physical counts from Panorama

### Steps

- Logon to Panorama Inventory component
- Search for active counts
- Cancel active counts no longer required

### Important Note(s):

- Do not complete old counts. Completing old counts will overwrite the current quantities on hand you have in the holding point

Step	Description	Expected Outcome
<b>1</b>	<b>Log into Panorama.</b>	
	1.1 Open browser navigate to URL: Production <a href="https://services.ehealthsask.ca/panorama/SecurityWeb/Portal">https://services.ehealthsask.ca/panorama/SecurityWeb/Portal</a> 1.2 Enter username and password: Your IDM credentials 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.
<b>2</b>	<b>Navigate to the Inventory component.</b>	
	2.1 On the top navigation bar click <b>Inventory</b>	Catalogue Item Information screen
<b>3</b>	<b>Expand the Inventory Maintenance menu</b>	
	3.1 Click on <b>Inventory Maintenance</b> link on the left hand navigation menu (if it is not already expanded)	Menu is expanded, sub menu's displayed
<b>4</b>	<b>Expand the Physical Inventory menu</b>	
	4.1 Click on <b>Physical Count</b> link on the left hand navigation menu	Menu is expanded, sub menu's displayed
<b>5</b>	<b>Navigate to the Manage Count screen</b>	
	5.1 Click the <b>Manage Count</b> link on the left hand navigation menu	Physical Inventory Count screen
<b>6</b>	<b>Find Old Active Counts</b>	
	6A Find all active counts for a specific holding point 6A.1 Click the <b>Clear</b> button 6A.2 Add the Holding Point 6A.2.1 Click the <b>Add Holding Point</b> link 6A.2.2 Select <b>Public Health Office</b> for the <b>HP Type</b> 6A.2.3 Click the <b>Search</b> button 6A.2.4 Select your Holding Point by checking the box beside it 6A.2.5 Click the <b>Add Holding Point</b> button 6A.3 Set <b>Count Status</b> to <b>Active</b> 6A.4 Click the <b>Search</b> button 6A.5 continue to step 7  OR 6B Find all active counts for all holding points in the organization 6B.1 Click the <b>Clear</b> button 6B.2 Click the <b>Search</b> button 6B.3 Continue to step 7	Search criteria is entered  HP is selected  Search results are displayed  Search criteria is entered Search results are displayed
<b>7</b>	<b>Cancel Unwanted Active Counts</b>	
	The only active counts you should see is the one currently being worked on (if any). If you see older Active counts we want to cancel those ones by following the steps	

Step	Description	Expected Outcome
below	7.1 Check the boxes beside each count you want to cancel 7.2 Click the <b>Cancel Count</b> button 7.3 Click the <b>Ok</b> button on the confirmation popup <ul style="list-style-type: none"><li>• Screen refreshes and a Count(s) successfully Cancelled message is displayed at the top of the screen.</li></ul>	
<b>END</b>		