Panorama: Inventory Replenishment

Create and Submit a Requisition Step Guide

Purpose

This guide covers the steps required to requisition product from one holding point to another.
Requistions can be used by:

- A PHO ordering vaccine from SDCL
- A PHO order vaccine from another PHO
- A External Holding Point ordering product from a PHO

Scenario

A holding point (PHO) orders product from another holding point (SDCL)

Steps

- Complete requisition header section
- Add the item(s) being requisitioned
- Enter quantities for each item
- Submit requisition

Before you begin

Have the following information:

- The holding point name that is requisitioning product
- The holding point name the product is being requisitioned from (replenishment center)
- Items and quantities to requisition

Related Policies

Steps

Step	Description	Expected Outcome
1	**Log into Panorama**	
	1.1 Open a browser and enter URL: https://services.ehealthsask.ca/panorama/SecurityWeb/Portal 1.2 Enter username and password: IDM credentials 1.3 Click the **Ok** button 1.4 Select Role (if applicable) – for users working in mulitiple Orgs 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.**	
	On the top navigation bar click **Inventory**	Catalogue screen is displayed.
3	**Expand the Inventory Replenishment menu**	
	Click on the **Inventory Replenishment** link on the left hand navigation menu *Note: Inventory Replenishment menu might already be expanded*	Menu is expanded and sub menus are visible
4	**Expand the Product Requisitions menu**	
	Click on the **Product Requisitions** link on the left hand navigation menu *Note: Product Requisitions menu might already be expanded*	Menu is expanded and sub menus are visible
5	**Navigate to the "Manage Requisitions" screen**	
	Click the **Manage Requisitions** link on the left hand navigation menu	Manage Requisition screen is displayed
6	**Create a new Requisition**	
	Click the **Create Requisition** button *Note: You do not have to search for existing Requisitions. If you started a requisition and saved it as a draft you can search for it here and continue.*	The Manage Requisitions screen is displayed
7	**Complete the Requisition Header section**	
	7.1 Add Requester Holding Point: 7.1.1 Click the **Search** button to the right of **Requestor Holding Point** 7.1.2 Enter Search Options	Holding Point Profile screen is displayed

• Select **Public Health Office** for the **HP Type**
7.1.3 Click the **Search** button
7.1.4 Check the box beside your **Holding Point Code**
7.1.5 Click the **Add Holding Points** button
 	
7.2 Complete the rest of the header section
    7.2.1 Ensure the **Replenishment Holding Point** is set to **SKProvDepot**
    7.2.2 Confirm the **Ship-to address** is correct
 	
Notes:
• *Can add ad hoc addresses if required*
• *Can order from any other holding point by selecting it from the drop down menu*
• *Can change the Required Delivery Date; if Urgent is selected as the Required Delivery Date then the reason for the urgency must also be entered. If Urgent is select please call/email SDCL so they know to search for it.*
	Holding Point is added and ship-to address etc is now populated
	
	Requisition header section is complete

8	**Save the Requisition**	
Click the **Save Requisition** button *Note: Requisition must be saved before the Add Order Set button is enabled to add item(s)*	Requisition is saved and the "Add Order Set" button is enabled	

9	**Add Item(s) to the Requisition**	
9.1 Click the **Add Catalogue Item(s)** button 9.2 Click the **Search** button 9.3 Select item(s) to order by checking the box to the left of each item 9.4 Click the **Add Catalogue Item(s)** button (at bottom of screen)	Items are selected and added to the requisition	

10	**Enter Quantities for each item**	
Enter quantities in the **Requisition Quantity** column: *Note: You can expand each item for more details or to enter comments by clicking the "+" sign at the left of a row.*	Quantities for each item are entered and shown on the form	

11	**Check the items you are ordering**	
Check the check box to the left of each line item being ordered *Note: Un-checked items will be removed from the requisition.*	Items being ordered are selected	

13	Submit the Requisition	
13.1 Click the **Submit Requisition** button 13.2 Click the **Ok** button on the pop up message that appears *"Only selected requisition line items will be submitted – unselected items will be removed. Do you wish to proceed?"* *Note: You can Save the requisition if you are not ready to submit it, this puts into a draft form that you can resume working on later.* *Note: Un-checked items will be removed from the requisition.*	Requisition is submitted and messages are displayed at the top of the page
14	**Next Steps**	
- Requisition will be received at SDCL, - SDCL will review and approve the requisition - SDCL will pick, pack and ship the product to the requesting office - The product is received at the requesting office and entered into Panorama.		
END		