Inventory Replenishment

Receive Requisition

Purpose

The purpose of this exercise is to go through the required steps to receive requisitions.

Scenario

Product that was requisitioned was delivered to the office and needs to be received in Panorama .

Steps are:
- Search and find the requisition for the received shipment
- Enter quantities and lot numbers for each item
- Receive the product

Data required to receive a requisition:
- Requisition Number
- Quantities and lot numbers of received items
- Which HPL to receive the product to

Related Policies

Receive Requisition - Steps

Step	Action	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.		
	2.1 From the top navigation bar click **Inventory**		The Catalogue Item Information screen is displayed.
3	Expand the Inventory Replenishment menu		
	3.1 Click the **Inventory Replenishment** menu item on the left hand navigation bar *Note: Menu may already be expanded*		Menu is expanded and sub menus visible
4	Expand the Product Requisitions menu		
	4.1 Click the **Product Requisitions** link on the left hand navigation bar		
5	Navigate to the Receive Product screen		
	5.1 Click the **Receive Product** button in the "Inventory Replenishment" section on the left hand menu		The "Receive Requisition / Return" screen is displayed
6	Select the Ship To Holding Point – Your Holding Point		
	6.1 Click the **Search** link beside **Ship To Holding Point** 6.2 Enter search criteria • **HP Type**: Public Health Office 6.3 Click the **Search** button 6.4 Check the box beside your Holding Point 6.5 Click the **Add Holding Point** button		Holding Point is selected and returned to the Receive Requisition/Return screen. Ship To Holding Point is populated with your Holding Point

Step	Action	Description	Expected Outcome
7	Complete the rest of search fields		
	7.1 Search Options: • (Optional) Enter **Ship From Holding Point**: type ahead field – start typing SKProv and select "SKProvDepot" from the list • (Optional) **Requisition Status**: Shipped 7.2 Click the **Search** button		Search results are displayed in the "Receive Requisition/Return Search Results" table
8	Select the requisition you want to receive		
	Check the check box for the requisition you want to receive Note: When actually receiving a requisition you would have the shipping manifest in hand with the Requisition number		The "Receive Requisition/Return" button is enabled
9	Navigate to the Receive Requisition / Return screen		
	Click the **Receive Requisition/Return** button		The "Receive Requisition / Return " screen is displayed
10	Expand the container section to see the shipped items		
	Click on the **Expand All** button *Note: Can click on the + button or the expand all button*		container section is expanded and shipped quantities are visible
11	Enter item details		
	11.1 For each item on the Requisition: • Ensure the correct quantity is in the **Received Qty** text box • Select which HPL you want the product placed in > select the usable Holding Point Location – ends with an "A" *Note: Only holding point ending in 'A' will be used at this time. Holding points ending in 'Z' are for non-usable product which will be used later.*		Item quantitys and HPL are selected for all items on the requisition
12	Add missing lot numbers (Optional - use these steps to add any missing lot numbers to your holding point) If you do not want to add any items skip to step 13		
	12.1 Click the **Add Line item** button 12.2 Click the **Search** button 12.3 Check the box beside the vaccine you want to add 12.4 Click the **Add Catalogue Item(s)** button 12.5 Select the Lot Number you are missing 12.6 Enter the Quantity Counted (missing lot number quantity) 12.7 Select the **HPL.A** from the drop down menu Repeat steps for other items if required		

Step	Action	Description	Expected Outcome
13	Complete Receiving the Requisition		
13.1 Click the **Receiving Completed** button 13.2 Click the **Ok** button on the message box that pops up			
END			