Inventory Maintenance
Step 1 Set up Physical Count

Purpose

The purpose of this guide is to show the required steps to setting up a Physical Count in Panorama and print a count sheet to record the quantity of vaccines in a holding point at a point in time.

Additional Notes:

- The Physical Count is managed in 2 steps. This document covers the first step to set up a physical count. Use the step guide named **Panorama Maintenance Physical Count Step 2 Complete Physical Count v2.0** to complete the count.
- When setting up a physical count you can add:
  - All items in a holding point; or
  - Only selected items in a holding point

Scenario

User wants to adjust the quantity on hand (QoH) for all or some of the items in a holding point.

Steps

- Start a new count
- Add items to the count
- Print count sheet

Before you begin

- Know which vaccines you want to count if you are only counting selected items

Assumptions:

The Physical count does not exist in Panorama and a new count is being created

- Steps for searching for an existing count is not included in this step guide

Step	Description	Expected Outcome
1	**Log into Panorama.**	
	1.1 Open browser and navigate to Panorama • URL: 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 is displayed.
3	**Expand the Inventory Maintenance menu**	
	3.1 Click the **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	The Physical Inventory Count screen is displayed
6	**Create a New count**	
	6.1 Click the **Create New Count** button	
7	**Select the Holding Point the count is for**	
	7.1 Click the **Add Holding Point** link 7.2 Select **Public Health Office** for the **HP Type** 7.3 Click the **Search** button (results are displayed in the table) 7.4 Check the box beside the Holding Point you want 7.5 Click the **Add Holding Points** button • you are returned to the Physical Count screen and the selected Holding Point in the Holding Point box	Holding Point is selected
8A	**Add all items in a holding point to the count** (go to step 8B if you want to add only specific item(s) to the count)	
	8A.1 Do nothing, by default all items in a holding point are added to the count. Continue to step 9	
8B	**Add only selected item(s) to a count**	

Step	Description	Expected Outcome
	(Skip this step if you added all items to count in step 8A)	
	8B.1 Click on the **Add Catalogue Items** button • Redirects you to the Catalogue Item Information screen 8B.2 Click the **Search** button • Brings up a list of all catalogue items 8B.3 (optional) Click on **Product Alternate ID** in the table header • Sorts the column alphabetically 8B.4 Selec the items you want included on the count by checking the check boxes beside the item(s) 8B.5 click the **Add Catalogue Item(s)** button at the bottom of the screen 8B.6 (optional) Click the **Show Selected Parameters** button • This will show you which items are included in the count • If you want to add more items click the **Add Catalogue Items** button again and select the items you want.	Items are selected
9	**Save the Count**	
	9.1 Click the **Save** button **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	Count is saved
10	**Print the count sheet**	
	10.1 Click the **Print Count Sheet/Tags** button 10.2 Click the **Open** button on the window that pops up 10.3 Print the document • Click on the Print Icon **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 The count is now setup, you have a count sheet and are ready to go physically count the product. When you are done counting and ready to record the numbers into Panorama refer to document named **Panorama Maintenance Physical Count Step 2 Complete Physical Count**	PDF is created PDF is printed