

Inventory Maintenance

Panorama: Adjust Inventory

Purpose

The purpose of this exercise is to describe the required steps in Panorama to adjust inventory items in a Holding Point Location

Steps are:

- Search existing adjustment
- If the adjustment is found -> review information and update if necessary
- If the adjustment is not found -> create a new one
 - Select the HP
 - Select the Reconciliation type (Quantity on hand adjustment)
 - Select Catalogue item
 - Enter quantity to adjust
 - Select the reason for the adjustment
 - Save the adjustment

Data required to do an adjust:

- Holding Point where the adjustment is required
- Catalogue item that requires adjustment
- Reason why the quantity is being adjusted
- Enter the quantity on hand
- Save and confirm the adjustment

Related Policies

Adjust Inventory - Steps

Step	Action	Description	Expected Outcome
1	Log into Panorama.		
	1.1 Open browser and enter URL: <ul style="list-style-type: none"> Prod: https://services.ehealthsask.ca/panorama/SecurityWeb/Portal 1.2 Enter username and password 1.3 Click the Ok button 1.4 Select Role (if applicable) 1.5 Click the Continue 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.
2	Navigate to Inventory component.		
	2.1 From the top navigation bar click Inventory		The Catalogue Item Information screen is displayed.
3	Navigate to Inventory Maintenance		
	3.1 Click on the Inventory Maintenance link on the left hand navigation bar		Menu is expanded and sub menus displayed
4	Navigate to the Adjust Inventory t screen		
	4.1 Click the Adjust Inventory link in the left hand navigation menu		Inventory Adjustment and Reconciliation screen is displayed
5	Select the Holding Point the adjustment is for		
	5.1 Click the Add Holding Point Link 5.2 Enter search criteria 5.3 Click the Search button 5.4 Check the box next to your holding point 5.5 Click the Add Holding Points button		HP is found and added to the Adjustment screen
6	Add the catalogue item to be adjusted		
	6.1 Click the Search Catalogue Link 6.2 Enter search criteria (or click the Search button to see all items) 6.3 Click the Search button 6.4 Check the boxes to the left of the product you want to adjust 6.5 Click the Add Catalogue Item(s) button		Catalogue item is selected
7	Select the Reconciliation Type		
	For the Reconciliation Type select Quantity On Hand Adjustment		Reconciliation Type is selected
8	Create a New Adjustment		

Step	Action	Description	Expected Outcome
	Click the New Adjust button		Inventory Adjustments and Reconciliation screen is displayed
9	Adjust Quantity on Hand (QoH) – If the lot number you want to adjust is not in the list go to step 10		
	9.1 Click the + sign in the row of the product you are adjusting 9.2 Enter the quantity on hand in the Adjusted QOH text box 9.3 Select Count Adjustment for the Adjustment Reason		
	<i>Note: You can enter comments if required</i>		
10	Add missing lot number to adjustment		
	10.1 Click the Add Product button 10.2 Check the box at the left of the line you want to add 10.3 Select the lot number from the drop down menu 10.4 Select the Holding Point Location you want to put the product into – the one that ends in .A 10.5 Enter the quantity you want to add in the Qty to HPL box 10.6 Click the Confirm button 10.7 Repeat steps to add additional missing items		New lot number(s) added to the adjustment
End			