

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.		
	Open browser and enter URL: Prod: https://services.ehealthsask.ca/panorama/SecurityWeb/Portal Enter username and password Click the Ok button Select Role (if applicable) 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.		
	From the top navigation bar click Inventory		The Catalogue Item Information screen is displayed.
3	Navigate to Inventory Maintenance		
	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		
	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 you use to find your holding point 5.3 Click the Search button 5.4 Check the box next to your holding point 5.5 Click the Add Holding Points button		Holding Point Profile screen is displayed Search criteria is entered HP's matching search criteria are returned HP is selected
6	Add the catalogue item to be adjusted		
	6.1 Click the Search Catalogue Link		Catalogue item is selected

Step	Action	Description	Expected Outcome
	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		
7	Select the Reconciliation Type		
	For the Reconciliation Type select Quantity On Hand Adjustment		Reconciliation Type is selected
8	Create a New Adjustment		
	Click the New Adjust button		Inventory Adjustments and Reconciliation screen is displayed
9	Add missing lot number to adjustment		
	<p>A) If the lot number is in the list on the Inventory Adjustment and Reconciliation screen that appears:</p> <p>9.1 Check the box to the left of the line item</p> <p>9.2 Click the '+' sign in the circle ⊕</p> <p>9.3 Enter in the quantity you have on hand in the Adjusted QOH box</p> <p>9.4 Select the Adjustment Reason</p> <p>9.5 Click the Adjust button</p> <p>9.6 Click the Confirm button on the screen that comes up</p> <p>OR</p> <p>B) If the lot number is not in the list</p> <p>9.1 Click the Add Product button</p> <p>9.2 Check the box at the left of the line you want to add</p> <p>9.3 Select the lot number from the drop down menu</p> <p>9.4 Select the Holding Point Location you want to put the product into – the one that ends in .A</p> <p>9.5 Enter the quantity you want to add in the Qty to HPL box</p> <p>9.6 Click the Confirm button</p> <p>9.7 Repeat steps to add additional missing items</p>		<p>lot number is adjusted</p> <p>New lot number(s) added to the adjustment</p>
	End		