

Inventory Maintenance

Panorama: View Inventory

Purpose

The purpose of this exercise is to walk through the required steps in Panorama to view inventory items in a Holding Point or across a region.

Scenario

User needs to lookup how much stock they have on hand for a product or number of products.

Use the view inventory function when you need to see the details of the inventory that is stored in a specific Holding Point or organization

Steps

- Log into Panorama
- Open the Inventory Component
- Select Inventory Maintenance from the left hand navigation menu
- Select View Inventory
- View Inventory – several ways:
 - Add a Holding Point
 - View Inventory
 - Select a Product Alternate ID
 - View Inventory

Before you begin

Have the following information:

- The catalogue item do you want to view and / or holding point.
- The holding point do you want to view.

Related Policies

View Inventory - 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 multiple Orgs 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.		
	On the top navigation bar click Inventory		Catalogue screen is displayed.
3	Navigate to Inventory Maintenance		
	Click on the “Inventory Maintenance” link on the left hand navigation bar <i>Note: Menu may already be expanded</i>		Menu is expanded and sub menus displayed
4	Navigate to the View Inventory t screen		
	Click the View Inventory link in the left hand navigation menu		Product Inventory screen is displayed
5	View summary of all inventory items for all HPs in your region		
	5.1 Click the SEARCH button <ul style="list-style-type: none"> Summary of all items in all HPs is displayed 5.2 Click radio button for any of the items you have showing <ul style="list-style-type: none"> Then click the SHOW HPL DETAILS button Then click the + sign to expand details A breakdown of the item and where it is located is displayed by HPL Click the CLOSE button to return to the search screen 		Inventory for all HPs and items are displayed for the region
6	View item(s) in your Holding Point		
	At the Product Inventory search screen: 6.1 Click the ADD HOLDING POINT hyperlink 6.2 Select “HP Type”: Public Health Office		HP is selected and back at the Product Inventory screen with the selected HP

Step	Action	Description	Expected Outcome
	6.3 Click the SEARCH button 6.4 Select your Holding Point from the list by checking the box to the left of it 6.5 Click the ADD HOLDING POINT button 6.6 Click the SEARCH button 6.7 Follow steps in 5.2 to view the holding point details.		All items in the HP are shown
7	View Inventory by catalogue item		
	At the Product Inventory search screen: 7.1 Click the CLEAR button 7.2 In the “Product Alternate ID” text box key in “Pne” and select Pneu-P-23{1} from the menu that appears (type ahead) 7.4 Click the SEARCH button		Fields are reset – HP is removed Catalogue item is entered Quantity on hand for Tdap are shown for the region
8	Product Details results screen.		
	Show Product Details will display the details of the Product Item(s). 8.1 When the search results are displayed <ul style="list-style-type: none"> • Select the radio button beside the appropriate record. • Select the SHOW PRODUCT DETAILS button. • Click the print icon on the top right of the screen if you would like a printout of the screen 8.2 To return to the search screen: Select the close button.		The Product Details screen is displayed. The Search Holding Point Inventory screen is displayed.
9	Quantity in Doses results screen.		
	The Quantity in Doses displays the product, lot # and quantity in doses for each holding point location within a holding point. 9.1 When the search results are displayed <ul style="list-style-type: none"> • Select the radio button beside the appropriate record. • Select the SHOW QTY IN DOSES button. • Click the print icon on the top right of the screen if you would like a printout of the screen. 9.2 Select the holding point location hyperlink for more details. <ul style="list-style-type: none"> • While on the Quantity in Doses screen click on Holding Point Location hyperlink in the Holding Point Location column. • Click the print icon on the top right of the screen if you would 		The Quantity in Doses screen is displayed. The Maintain Holding Point Location Information screen is displayed. The Search Holding Point Inventory

Step	Action	Description	Expected Outcome
		like a printout of the screen. 9.3 Return to the Search Holding Point Inventory screen. <ul style="list-style-type: none">• Select the CANCEL button.• Select the CLOSE button.	screen is displayed.