

Inventory Maintenance

Step 1 Set up Physical Count for Flu Products Only

Purpose

The purpose of this guide is to show the required steps to set up a Physical Count for Flu products only and print a count sheet to record the quantity of Flu 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 for only Flu products. Use the step guide named **Panorama Complete a Physical for Flu** to complete the count.

Scenario

User wants to adjust the quantity on hand (QoH) for Flu products in a holding point.

Steps

- Start a new count
- Add only Flu vaccines to the count
- Print a count sheet


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 <ul style="list-style-type: none"> URL: https://services.ehealthsask.ca/panorama/SecurityWeb/Portal 	User is logged into Panorama and at the splash page.
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	
<i>Note: The role selection option is only available to users with multiple roles</i>		
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	Holding Point is selected
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 <ul style="list-style-type: none"> you are returned to the Physical Count screen and the selected Holding Point in the Holding Point box 	
8	Add only selected item(s) to a count (Skip this step if you added all items to count in step 8A)	
8.1	Click on the Add Catalogue Items button <ul style="list-style-type: none"> Redirects you to the Catalogue Item Information screen 	Items are selected
8.2	Click the Search button	

Step	Description	Expected Outcome																											
	<ul style="list-style-type: none"> Brings up a list of all catalogue items <p>8.3 (optional) Click on Product Alternate ID in the table header to sort the column alphabetically</p> <table border="1" data-bbox="292 405 896 548"> <thead> <tr> <th>Catalogue Item Code</th> <th>Product Alternate ID</th> <th>Catalogue Item Name</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> 61</td> <td>BAT{1}</td> <td>Botulism Antitoxin {1_x_25</td> </tr> <tr> <td><input type="checkbox"/> 62</td> <td>DAT{1}</td> <td>Diphtheria Antitoxin {1 x 1</td> </tr> </tbody> </table> <p>8.4 Select the items you want included on the count by checking the check boxes beside the item(s)</p> <ul style="list-style-type: none"> Inf QIV{1} InfTmf QIV PFS{1} Inf{10} InfTmf{1} LAIV_{1} <table border="1" data-bbox="196 837 1096 1266"> <tbody> <tr> <td><input checked="" type="checkbox"/> 20002152</td> <td>Inf QIV{1}</td> <td>FLUZONE_QUADRIVALENT{0.5mL_vial}{1}SP</td> </tr> <tr> <td><input checked="" type="checkbox"/> 20002153</td> <td>InfTmf QIV PFS{1}</td> <td>FLUZONE_QUADRIVALENT{10_x_0.5mL PFS}SP</td> </tr> <tr> <td><input checked="" type="checkbox"/> 15</td> <td>InfTmf{1}</td> <td>AGRIFLU{10_x_0.5mL}NVD</td> </tr> <tr> <td><input checked="" type="checkbox"/> 17</td> <td>Inf{10}</td> <td>FLUVIRAL{5.0mL_vial}{1}GSK</td> </tr> <tr> <td><input type="checkbox"/> 18</td> <td>IPV{1}</td> <td>IMOVAX_Polio{1_x_0.5mL}SP</td> </tr> <tr> <td><input checked="" type="checkbox"/> 69</td> <td>LAIV_{1}</td> <td>FLUMIST{10_x_0.2mL}</td> </tr> </tbody> </table> <p>8.5 click the Add Catalogue Item(s) button at the bottom of the screen</p> <p>8.6 (optional) Click the Show Selected Parameters button</p> <ul style="list-style-type: none"> 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. 	Catalogue Item Code	Product Alternate ID	Catalogue Item Name	<input type="checkbox"/> 61	BAT{1}	Botulism Antitoxin {1_x_25	<input type="checkbox"/> 62	DAT{1}	Diphtheria Antitoxin {1 x 1	<input checked="" type="checkbox"/> 20002152	Inf QIV{1}	FLUZONE_QUADRIVALENT{0.5mL_vial}{1}SP	<input checked="" type="checkbox"/> 20002153	InfTmf QIV PFS{1}	FLUZONE_QUADRIVALENT{10_x_0.5mL PFS}SP	<input checked="" type="checkbox"/> 15	InfTmf{1}	AGRIFLU{10_x_0.5mL}NVD	<input checked="" type="checkbox"/> 17	Inf{10}	FLUVIRAL{5.0mL_vial}{1}GSK	<input type="checkbox"/> 18	IPV{1}	IMOVAX_Polio{1_x_0.5mL}SP	<input checked="" type="checkbox"/> 69	LAIV_{1}	FLUMIST{10_x_0.2mL}	
Catalogue Item Code	Product Alternate ID	Catalogue Item Name																											
<input type="checkbox"/> 61	BAT{1}	Botulism Antitoxin {1_x_25																											
<input type="checkbox"/> 62	DAT{1}	Diphtheria Antitoxin {1 x 1																											
<input checked="" type="checkbox"/> 20002152	Inf QIV{1}	FLUZONE_QUADRIVALENT{0.5mL_vial}{1}SP																											
<input checked="" type="checkbox"/> 20002153	InfTmf QIV PFS{1}	FLUZONE_QUADRIVALENT{10_x_0.5mL PFS}SP																											
<input checked="" type="checkbox"/> 15	InfTmf{1}	AGRIFLU{10_x_0.5mL}NVD																											
<input checked="" type="checkbox"/> 17	Inf{10}	FLUVIRAL{5.0mL_vial}{1}GSK																											
<input type="checkbox"/> 18	IPV{1}	IMOVAX_Polio{1_x_0.5mL}SP																											
<input checked="" type="checkbox"/> 69	LAIV_{1}	FLUMIST{10_x_0.2mL}																											
9	Save the Count																												
	<p>9.1 Click the Save button (CAUTION – Clicking the Save button multiple times will add each lot number to the count for each time it is clicked)</p> <p>IMPORTANT NOTE: If each lot number is displayed two times or more delete the count and start over or you potentially wipe out all the stock in the holding point</p>	Count is saved																											
10	Print the count sheet																												
	10.1 Click the Print Count Sheet/Tags button	PDF is created																											

Step	Description	Expected Outcome
	<p>10.2 Click the Open button on the window that pops up</p> <p>10.3 Print the document</p> <ul style="list-style-type: none"> Click on the Print Icon  <p>IMPORTANT NOTE: If each lot number is displayed two times or more delete the count and start over or you will potentially wipe out all the stock in the holding point</p> <p>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 Complete a Physical Count Flu</p>	<p>PDF is printed</p>
<p>END</p>		