NHS Supply Chain

Electronic Demand Capture (incorporating eDC Gold)

Guidance Notes

Web version v1.26
Android application version v2.6.10

Contents

General information

System messages

System messages are shown towards the top of the web page.

- Confirmation messages are in green:

  ✔ MMD 'AJP123' created successfully   ⊗

- Notification messages are in yellow:

  ⚠ Sorry, we were not able to satisfy your request because the website is unusually busy. Please click the 'Back' button in your web browser and try again   ⊗
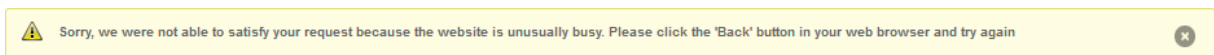
- Information messages are in blue:

  ⓘ Changes to tracking attributes are not allowed while you have stock on hand

- Failure messages are in red:

  There was an error with your submission
  WarnShelfLifeDays must be set if the item is flagged for sellby dating

Required information

Red labels indicate that the information in a field is required. You cannot save your changes if the required fields do not contain any details.

Document conventions

- Menu options, labels and links are all shown in bold. For example, in "Click **Save** before leaving this page", **Save** is the text on a button.

- Some screenshots are annotated with numbers. These numbers correspond to a particular instruction in the step-by-step instructions associated with that screenshot.

  Numbers in screenshots are not always sequential, as not every step is represented.

eDC Gold information

- Where sections **only apply** to eDC Gold, these are marked with vertical lines in the margin, and headings have a **G** suffix. If you are not using eDC Gold, you can safely ignore any sections marked in this way.

If any instructions in a section not explicitly associated with eDC Gold affect the eDC Gold version of the application, they are highlighted in notes like this one.

Abbreviations

COSHH	Control of Substances Hazardous to Health
CSSD	Central Sterile Supply Department
eDC	Electronic Demand Capture
GLN	Global Location Number – a number (up to 13 digits) that uniquely identifies a physical location, such as a requisition point
GTIN	Global Trade Item Number – a globally unique number (up to 14 digits) used to identify trade items, products or services
IP	Internet Protocol
MMD	Materials Management Department
MSL	Maximum Stock Level
NPC	National Product Code
PLIC	Patient Level Information and Costing
ROL	Reorder level
ROQ	Reorder quantity
UOI	Unit of issue
UOM	Unit of measure
VLT	Variable Lead Time – where the lead time differs from the standard 48 hours (applies to Blue Diamond orders only)

Icons used with the eDC application

	Demand created automatically from information held about requirements and current stock levels.
	Demand recorded manually using the web application.
	Demand captured manually using the device.
S	The serial number of this product is being tracked in stock management **G**
B	The batch number of this product is being tracked in stock management **G**
	The expiry date of this product is being tracked in stock management **G**
	Remove a serial number from a product's record when receipting. **G**
	Paste a copy of the product record so you can record different tracking information.

Part 1:   Overview

These guidance notes are written for people using handheld devices to capture demand and for those responsible for configuring the system to meet local requirements.

■   Part 1 outlines the concepts behind eDC and explains how it may be used within your organisation. It also outlines changes in both the application and this document:

■   Part 2 (starting on page 16) explains how to access the eDC web application.

■   Part 3 (starting on page 22) describes configuring eDC using the web application.

■   Part 4 (starting on page 85) gives instructions for logging on to the eDC Android application.

■   Part 5 (starting on page 107107) tells you how to update the information on the device.

■   Part 6 (starting on page 144) covers day-to-day use of a device to capture demand and generate orders.

■   Part 7 (starting on page 171) uses the eDC web application to manage and track orders.

Additional features (eDC Gold)

An enhanced version of eDC – known as eDC Gold – enables you to manage expensive items of stock more efficiently, knowing where they are at any time.

You will only be using eDC Gold if your organisation has decided – in consultation with NHS Supply Chain – that it will gain significant benefits from tighter stock control.

The appearance of the eDC Gold screens on the device has adopted the same colour schemes and conventions as the web application (as far as these can be applied). This means that error messages and other important items stand out as brighter in colour, with the rest having a more consistent blue theme.

■   Preparing to use eDC Gold to manage stock is described in 'Managing stock (**G**)' on page 67 and 'Downloading store information (**G**)' on page 97.

■   Using the device to manage store stock is explained in 'Managing stock levels and movements on the eDC Android application (**G**)' on page 123.

■   Using the web application to manage stock is explained in 'Managing stock levels and movements (**G**)' on page 157.

What's new in eDC (Electronic Demand Capture)?

News about new features and bug fixes can be found on the NHS Supply Chain website at
https://www.supplychain.nhs.uk/programmes/service-improvements/edc-android-devices/

Introduction to eDC

eDC is used by NHS and other organisations to manage their ordering process.

What is eDC?

eDC enables staff to record current levels of supplies either using handheld devices that incorporate barcode scanners or via the web interface. Orders can then be created automatically based on those stock levels and the quantity of stock required (demand).

The web interface is used to set desired stock levels and the preferred update mechanism for your organisation's local area and maintain details of the requisition points using the system. It is also used to resolve conflicts and generate orders if manual intervention is required.

eDC can order locally sourced products alongside those supplied by NHS Supply Chain. Local products are added to a local catalogue and can be ordered using this system.

What is eDC Gold? (G)

eDC Gold consists of all the elements of eDC, plus an enhancement that enables you to manage your stock of high-value items, identifying stores and stock locations and the quantities of stock held at each of them, tracking the movements of these specified products as they are received and issued.

What are the benefits?

eDC is the most cost-effective way of managing stock levels. It makes the ordering process easy, so there is less chance of errors. It releases nursing time back to the wards and other departments, improving communication between these areas and the procurement departments.

eDC also provides management information and enables you to forecast demand.

Communications and networking

The Android device requires a stable WIFI connection connected to the Internet or an Internal NHS network, which can connect to the eDC Servers. If eDC is having connectivity issues, please contact the NHS Supply Chain CS Helpdesk, which can help diagnose the issue and may refer you to your local IT department to resolve it. (Phone 0800 086 8670 or email CSHelpdesk@supplychain.nhs.uk).

These devices are managed using a Mobile Device Management system called SOTI MobiControl, which allows NHS Supply Chain to manage the devices remotely, including software updates and remote support.   If the trust's network is blocking SOTI MobiControl, the

device will not be updated with the latest version of the eDC application, the device's firmware, which may be a security risk the more out of date they get.

How eDC works

Download requirements regularly to ensure you are working with up-to-date information.

If you are using eDC Gold, it is best practice to download the store daily, preferably in the morning.

eDC uses the concept of MMDs (Materials Management Departments), each linked to an organisation and allocated one or more requisition points. MMDs are created and maintained using the web-based application.

An Android application captures current stock levels for a particular requisition point. When this information is uploaded to the eDC web application, the current stock levels are compared to the required stock levels, and orders are automatically created and ready for authorisation.

Ordering has been automated as much as possible. The most appropriate replenishment method is selected for a requisition point from the options available (see 'Associating requisition points with the MMD' on page 25). Automatic adjustments to order quantities can also be specified to obtain the best possible price while respecting constraints such as available space.

eDC captures the *requirement* for an order – a requisition. The order itself is created and stored within the online ordering application and can be tracked using that application.

Supported devices

eDC currently supports the following devices.

Zebra TC52 Android devices

Charging LED:
Flashing LED = charging
Solid LED = fully charged

Right scanner button

Push-to-Talk button (not used)

Left scanner button

Charging connections

Right scanner button

Scanner

Volume (+ / -)*
(Does not affect the scanner beeper volume)

Power button
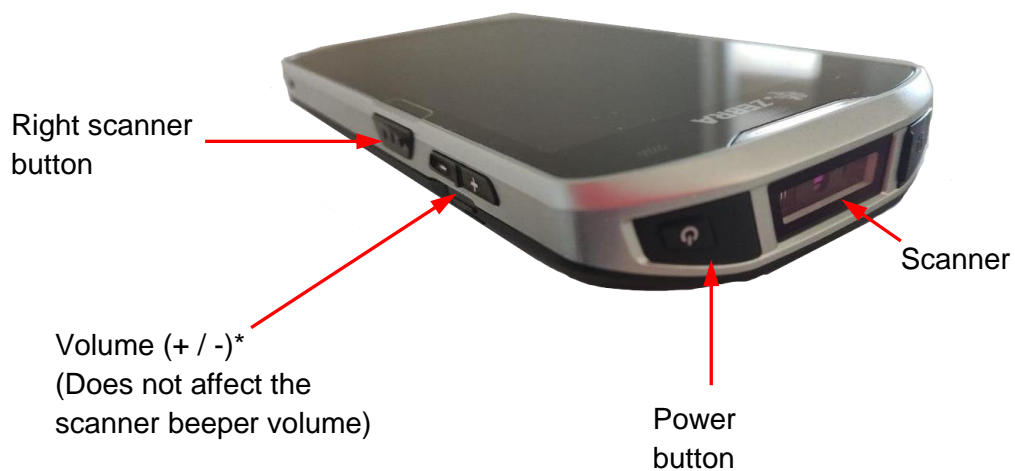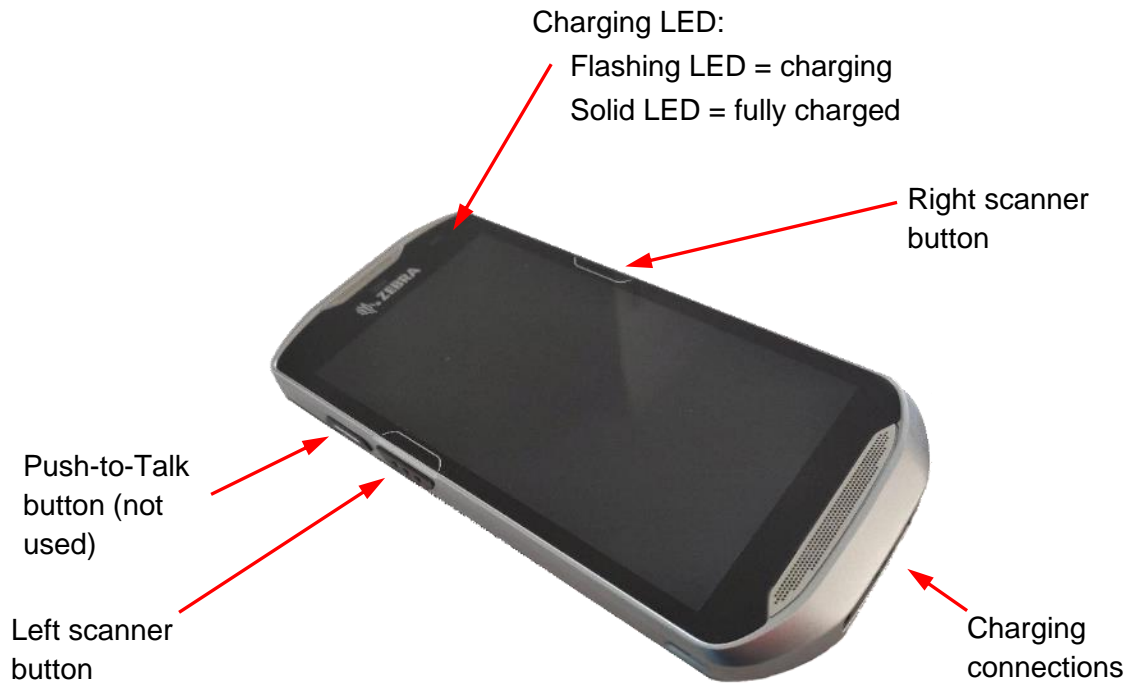
Navigation

The eDC app has a 'hamburger' icon in the top-left corner. Tap it to access the main menu, which contains menu items for navigating the application.

- **Home** returns you to the **Home** screen.

- **Network Setup** should only be needed if required by your IT department to enter Network Proxy details.

- **Barcode Management** and **Pending Transaction** are only enabled if you are using eDC Gold.

- **Device Information** shows details of the Android device and its memory status.

- **Catalogue** redirects you to the **Catalogue Search/Browse** screen.

- **Logout** ends your session and logs you out of the Android device.
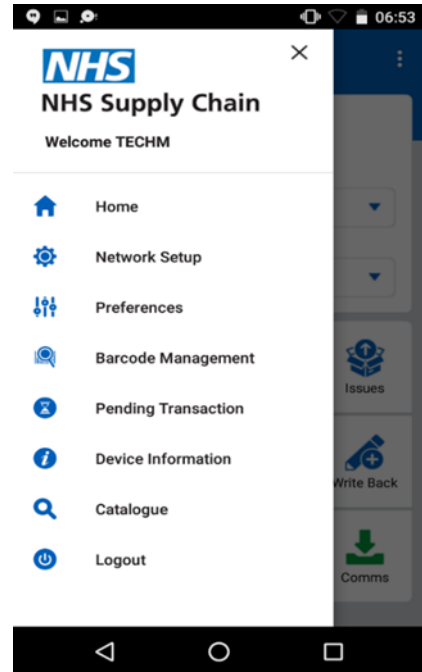
Part 2:   Logging on to the web application

This section describes the log-on process for the web application. Logging on to the device is covered in 'Part 4: Logging on to and updating the ', starting on page 85.

There are two main components to eDC: the web-based application and the device. Depending on your job role, you may only need to access one.

The web application is used to:

- Configure eDC to reflect your requirements.

- Authorise and possibly amend any orders generated from the captured information that are not automatically submitted to NHS Supply Chain.

If you are using eDC Gold, you will see an additional menu option after logging on to the eDC application called **Stock**. This menu option is not visible if you are using the standard eDC application.

Logging on to the eDC web application

You can access eDC from any computer with an internet connection. You must log on using your own username and password.

To log on to the eDC web application:

1 Go to the NHS Supply Chain website by entering https://www.supplychain.nhs.uk/ in your browser.

The Supply Chain website's home page contains a lot of information, including news on particular products and initiatives. From here (assuming you have access), you can access different areas of the website.

2 In the blue menu bar towards the top of the page, hover on **My Supply Chain**
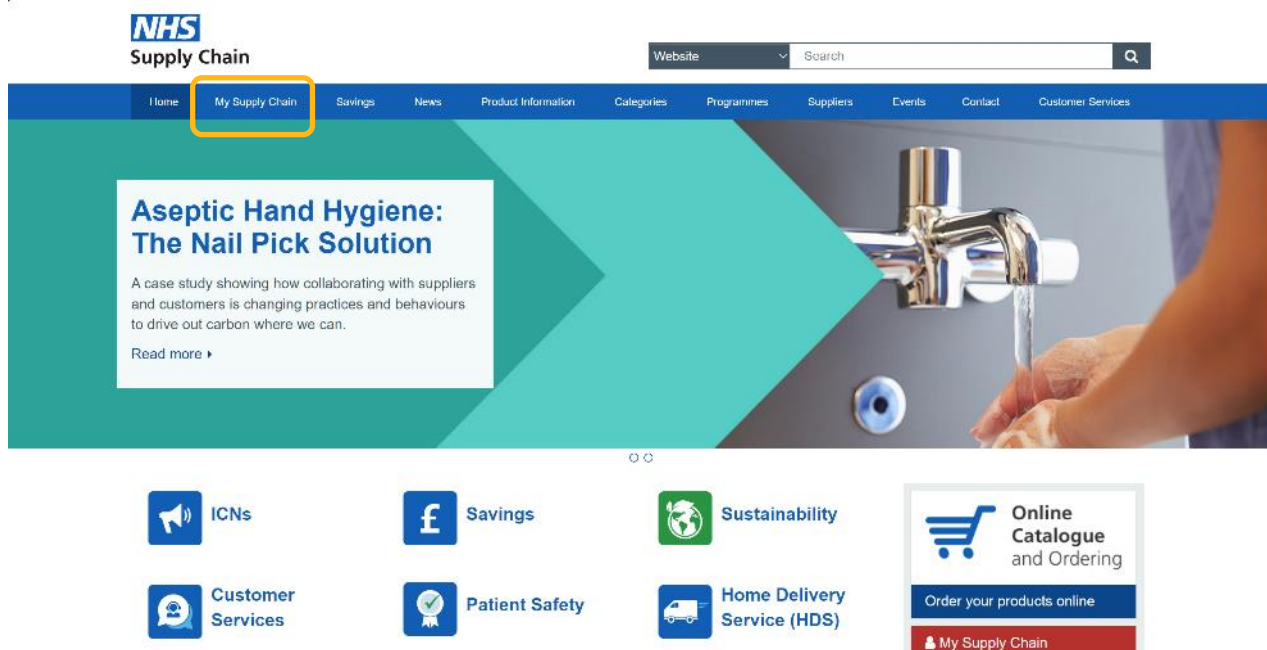
3 Click on **eDC log in** to go straight to the eDC login page (see page 18).
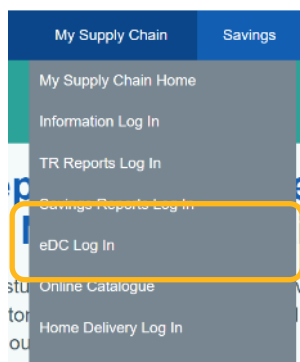
The 'My Supply Chain' page

The **My Supply Chain** page contains links to relevant and useful information. From here, you can access the application areas (Online Catalogue and Ordering, eDC, Home Delivery, and Billing) and the related guidance notes.

> From here you can also:
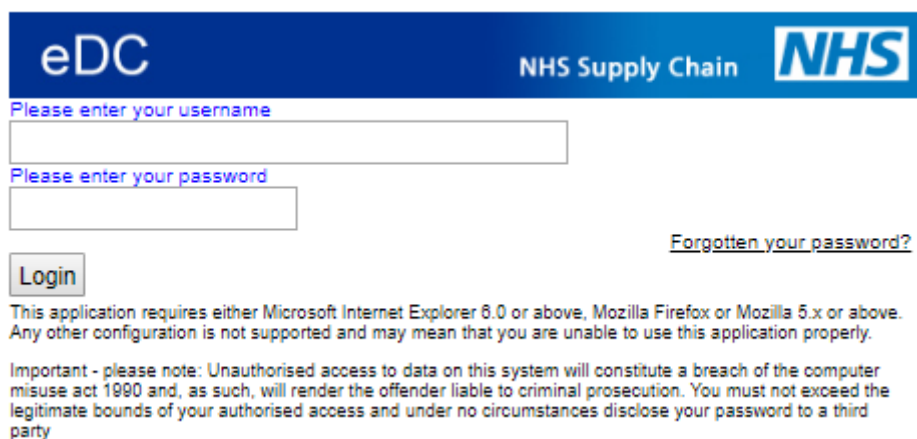
- See application alerts and messages – for example, relating to Bank Holidays or notifications of changes.

- Access the user guides for all the applications.

Accessing eDC

Your organisation's administrator creates usernames and passwords for people who need to access the eDC application.

If you already have a login and password for another application – such as Online Ordering or Home Delivery Service – this will be updated to include the eDC roles you need.
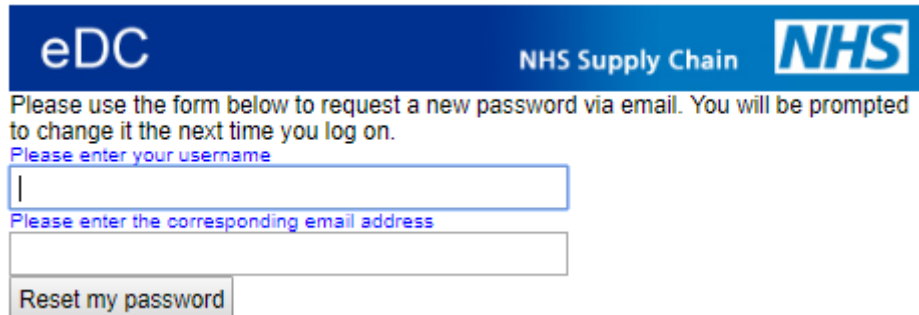
Please read the information below the Login button carefully. The details of the browsers supported may change as the system is updated. Information about unauthorised access is a serious reminder of the need to keep your password confidential.

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1   Type your username into the box. It is changed to uppercase as you type.

2   Type your password into the password box and click **Login**.
   - If your password is valid and you have access to eDC, you are logged in.
   - If your password has expired, or you are using the system for the first time, you must change your password.

Forgotten your password?

If you have forgotten your password, click **Forgotten your password?** on the right of the login box. A new password can be sent to you by email.

3   Type your username and your email address into the boxes.
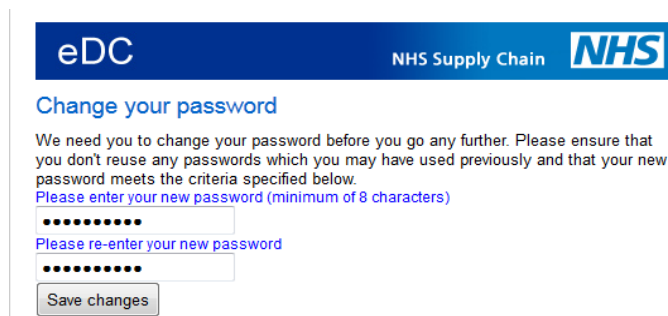
4   Click **Send password**.

A new temporary password is sent to you by email. You must change it the first time you log on.

You must provide the email address stored in your NHS Supply Chain user record. The system checks that the email addresses match before resetting your password and sending a new one.

Changing your password

You must change your password every 30 days. It is changed using the web application, but the same password is used for the NHS Supply Chain web applications and for the eDC Android application.

1   Type your new password into both boxes.

2   Click **Save changes**.

You are logged into eDC once your new password has been saved.

When you click **Save changes**, the Web Browser may ask if you want it to remember your password. Ensure you select No so that other persons are not able to use your account.

Selecting your location (MMD)

Before you can do anything else in the eDC application, you need to set your local MMD.

1   Select the **Warehouse** (depot) that serves you from the drop-down list (this may be selected automatically if you only have one listed.)

The list of MMDs update to show those associated with that warehouse.

2   Select your **MMD** from the list.

You can type part of the name of the MMD in the **Criteria** box to reduce the number of MMDs shown.
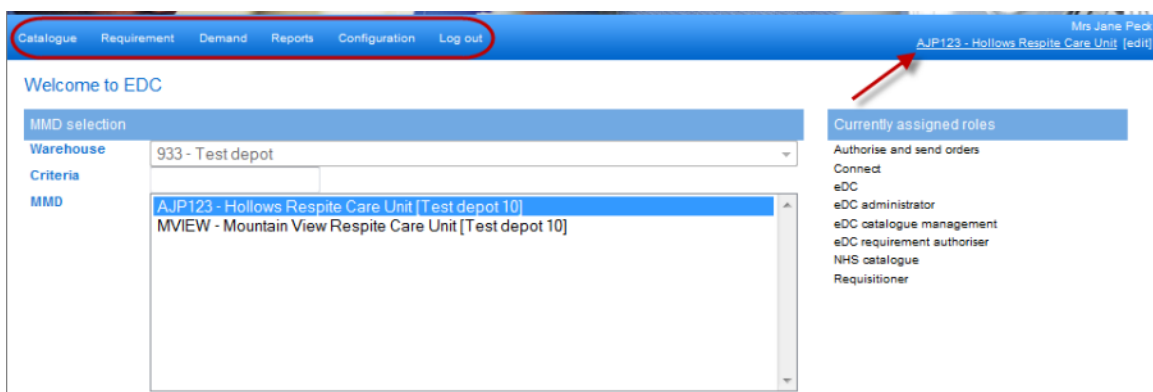
The chosen MMD is displayed in the right side of the blue menu bar – you can change it by clicking **edit** to the right of the MMD name.

The other options in the blue menu bar are now available – the ones available to you depend on your currently assigned roles, which are also displayed on the right side of the page.

Selecting a site and store (optional) (G)

If you are using eDC Gold, you have the option to choose a **Site** and a corresponding physical **Store** – the list of stores is shown when a site has been selected.

You **must** select a **Site** and a **Store** if you want to track stock levels and locations during this session but do not need to do this if you are not intending to do these things.
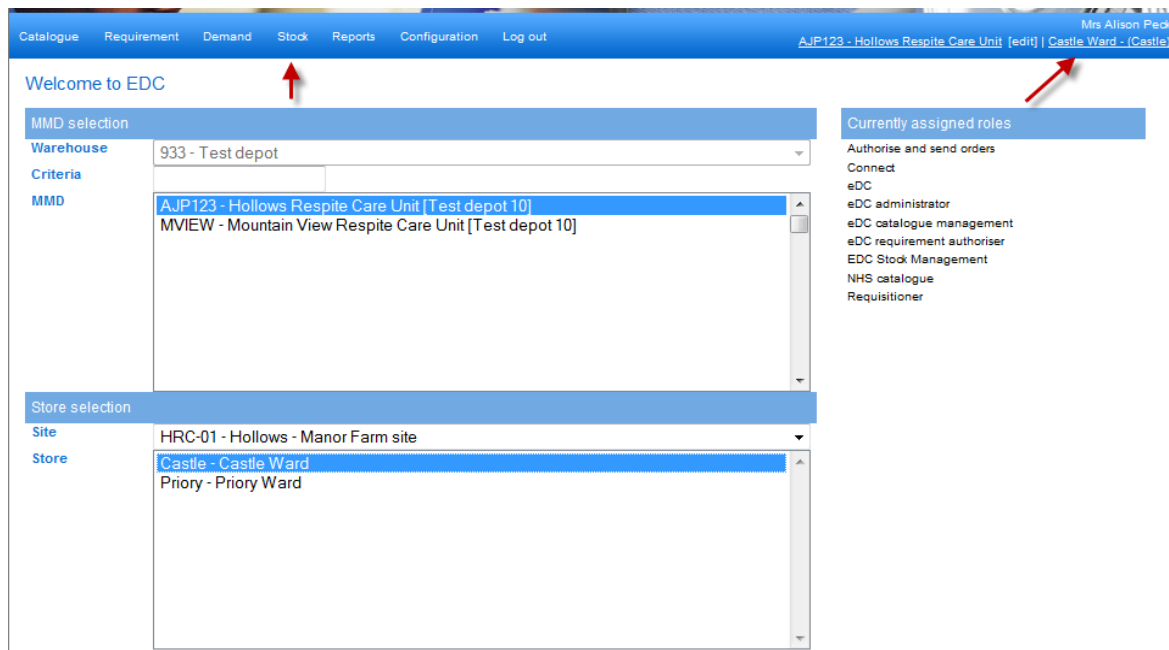
If you do select a **Site** and a **Store**, the **Stock** menu is displayed among the other menu options, and the store is shown on the far right of the blue bar.

To change the selected **Store** to a different one at any time, click its name.

Logging off from the web application

When you have finished using the eDC web application, you must log out by clicking the **Log out** option on the blue menu bar.

Part 3: Configuring eDC using the web application

This part explains how to configure eDC to meet the requirements of your organisation.

You use the web application to:

■ Create and amend MMDs (see page 23)

■ Manage nonstock products, placing them in a local catalogue to make them available for ordering (see page 34)

■ Create and manage external locations, required when using eDC with your local systems (see page 43)

■ Specify requirements – the products and stock levels required for each requisition point (see page 48)

■ Make global changes to product codes associated with multiple requisition points (see page 58).

This part also provides an overview of user account access and the roles associated with the eDC application.

Creating and amending MMDs

You must have the eDC Administrator role to create or change MMDs.

MMDs are collections of requisition points that can be managed as a single entity.

New MMDs and changes to existing MMDs are not available for use by a device until they have been loaded using the eDC Android App's Comms screen.
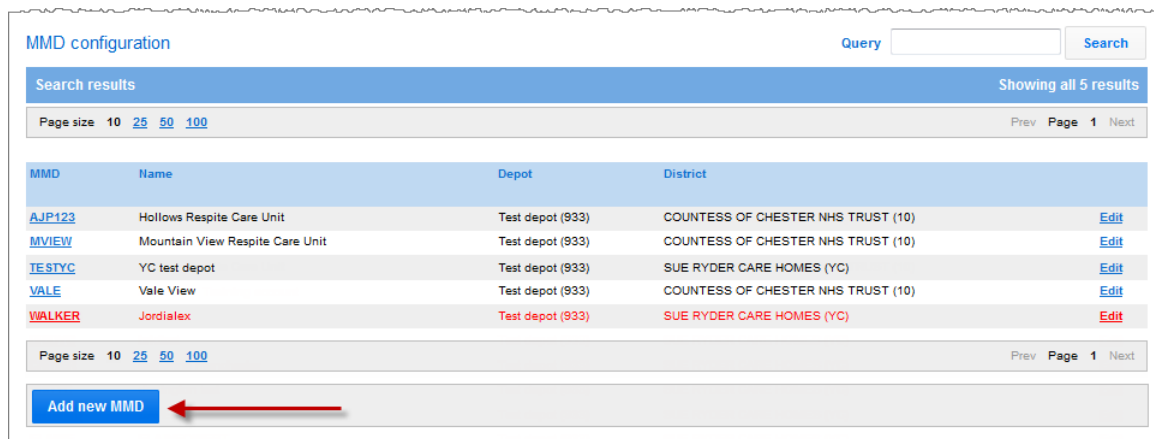
Adding a new MMD

You can add new MMDs at any time. To add a new MMD:

1 From the **Configuration** option on the blue menu bar, select **MMD Configuration**.
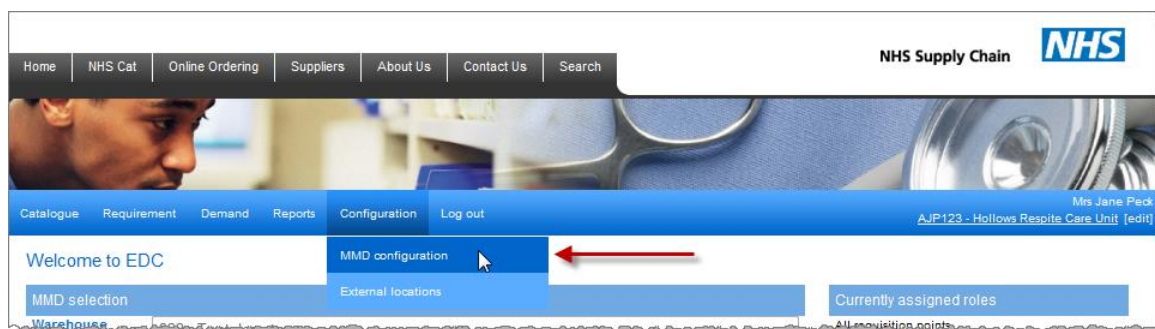
A list of all the MMDs you can access is shown. Any inactive MMDs are shown in red.

2 Click **Add new MMD** and the **Add a new MMD** page opens.

3 Complete the **MMD details** section following the guidelines below:

   ▪ The **MMD short name** is a six-character name used to identify the MMD on the device. It must be unique.

   ▪ **MMD name** is a more descriptive name for the MMD. It can be up to 40 characters long.

- **Depot** defaults to the depot associated with your current MMD (the one you chose when you logged on). If a different depot will service this MMD, select it from the drop-down list.
- **District** is the organisation associated with this MMD. This automatically defaults to the organisation associated with your current MMD, but you can select any organisation that you can access.
- **Active** indicates that the MMD is currently in use.

4   Select the **Catalogue** that this MMD will use for non-NHS Supply Chain items (your local catalogue).

- Select **Create New Catalogue** to create a catalogue just for this MMD.
- Select a catalogue from the list to share a catalogue associated with another MMD. MMDs within an organisation may choose to share a catalogue to simplify the management process.

    Click **Who shares this catalogue?** to see a list of MMDs using the catalogue you select.

Once the MMD is created, the Catalogue the MMD is assigned to cannot be changed.

Add a new MMD

MMD details

MMD short name	❓	AJP125
MMD name		Teddy Bears Respite Care Unit
Depot		933 - Test depot ▾
District		10/TST COUNTESS OF CHESTER NHS TRUST ▾
Active		☑

MMD settings

Catalogue	Test depot 10 (apeck on 21/08/2012 15:28:14) ▾	Who shares this catalogue?
Supplier list sort order ❓	Supplier reference ▾	

[Back to MMD list]   [Save]

Information on managing your local catalogue is in 'Managing non-stock products', which begins on page 34.

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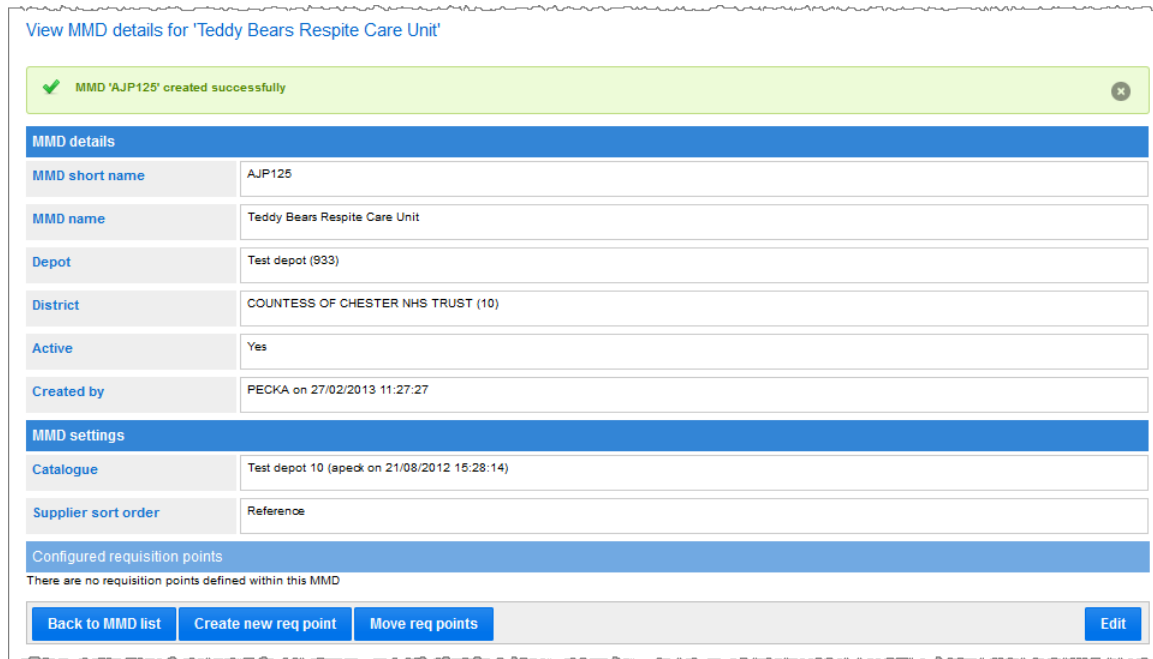
5   **Supplier list sort order** specifies whether suppliers are sorted by number or by name on the catalogue management pages.

6   Click **Save** to save your changes.

When this MMD is saved, you are automatically logged on (as shown by the MMD identifier at the right of the blue menu bar).
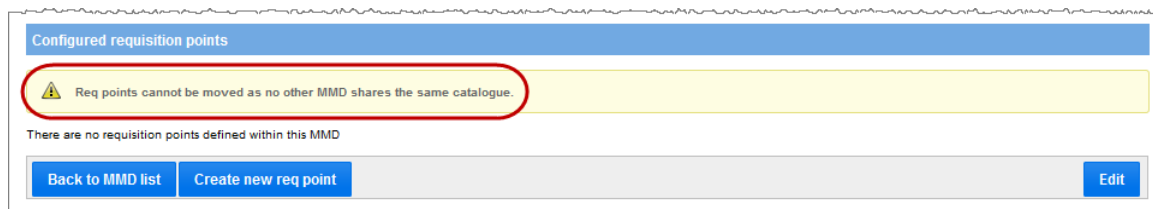
Associating requisition points with the MMD

A summary of the MMD is shown when it is saved.

Before the MMD is available for use, you must associate it with a requisition point. If this MMD shares an NHS District and Catalogue with another MMD, requisition points can be moved from that MMD to this one.

In the example below, no other MMD uses the same catalogue and the **Move req points** button is not shown.

To associate an available requisition point with this MMD:

1 Click **Create new req point** at the bottom of the summary page.

The **Add a new requisition point definition** page opens.

2 Select a **Requisition point** to associate with this MMD from the drop-down list. Only requisition points that are not assigned to other MMDs are shown.

Requisition Points can only be created in eDC if they are *active* in the Online Catalogue web application.

Replenishment methods

There are three replenishment methods, and you should choose the one that enables you to maintain optimum stock levels for your department:

- **Top up (recommended for best practice)**

  If the quantity of a product falls below the maximum stock level specified for that product, sufficient is ordered to bring the quantity back to that maximum stock level.

  This option ensures you are always fully stocked without manual intervention.

- **Automatic (recommended for bulk stores)**

  A reorder level (ROL) and reorder quantity (ROQ) are specified for each product (these are mandatory entries). If the quantity currently in stock is less than or equal to the ROL, the ROQ is ordered.

  This option is very useful if you wish to take advantage of our price break quantities.

- **Manual**

  An ROL and an ROQ *need to* be set for each product – but these values are only used as a guide. You manually enter the quantity required when collecting data based on the information on the bar code label.

  This option is useful if there are no consistent ordering patterns for the department or if you wish to order more than the maximum stock figure.

3 Select the **Replenishment method** you want to use (see 'Replenishment methods' at the top of page 26).

4 Select an **External location** from the drop-down list. This is the external destination for any non-stock deliveries and should *only* be used if you are using eDC for non-stock products. See 'Using eDC with your purchase order system' on page 43.

Pricing mechanism

Some products are priced to give discounts for buying in bulk. For example:

■ Cost for 1 of the product: £2
■ If you buy 10 of the product in a single transaction: £1.80 each
■ If you buy 15 of the product in a single transaction: £1.50 each

The pricing mechanism determines how the total cost is calculated.

■ **Plateau pricing** simply multiplies the number ordered by the price for buying *at least* the number forming a price break.

Continuing the example above, ordering 16 of the product will cost 16 × £1.50 and ordering 12 of the product will cost 12 × £1.80.

■ **Banded pricing** works by breaking the quantity ordered into bands.

In this case, ordering 16 of the product will cost 15 × 1.50 plus 1 × £2 and ordering 12 of the product will be charged at 10 × 1.80 plus 2 × 2.

You must specify an external location if you want orders from the local catalogue to be auto-processed (ordered from Issued Transactions on the eDC Android App). See 'Stock definitions (**G**)' on page 73.

PLIC External location is used if you are exporting PLIC information from eDC Gold. See 'Specifying external locations for PLIC information' on page 46.

5   Select **Price breaks** if you want to automatically round up requisition quantities to the next price band.

If you select this option, a **Price breaks percentage** box will appear. The figure you specify here enables the system to order more of a product than you requested to take advantage of reduced-price options.

For example, assume your price break percentage is set to 25%:

▪   If you order 8 of a product and the subsequent price band break is 10, the system will automatically order 10 (as this is within 25% of the original 8).

▪   If you order 7 of a product and the subsequent price band is 10, the system will order 7 as an increase to 10 is greater than 25%.

6   Select your **Pricing mechanism** from the list:

▪   **Plateau** gives you the whole quantity at the lowest price.

▪   **Banded pricing** calculates the cost in blocks.

For more information, see 'Pricing mechanism' at the top of page 27.

7   A **Local reference** is a look-up between eDC and organisation purchase order systems. Only complete this field if your external non-stock processes require this information.

8   Select **Active** to make this requisition point available for use.

9   Click **Save**.
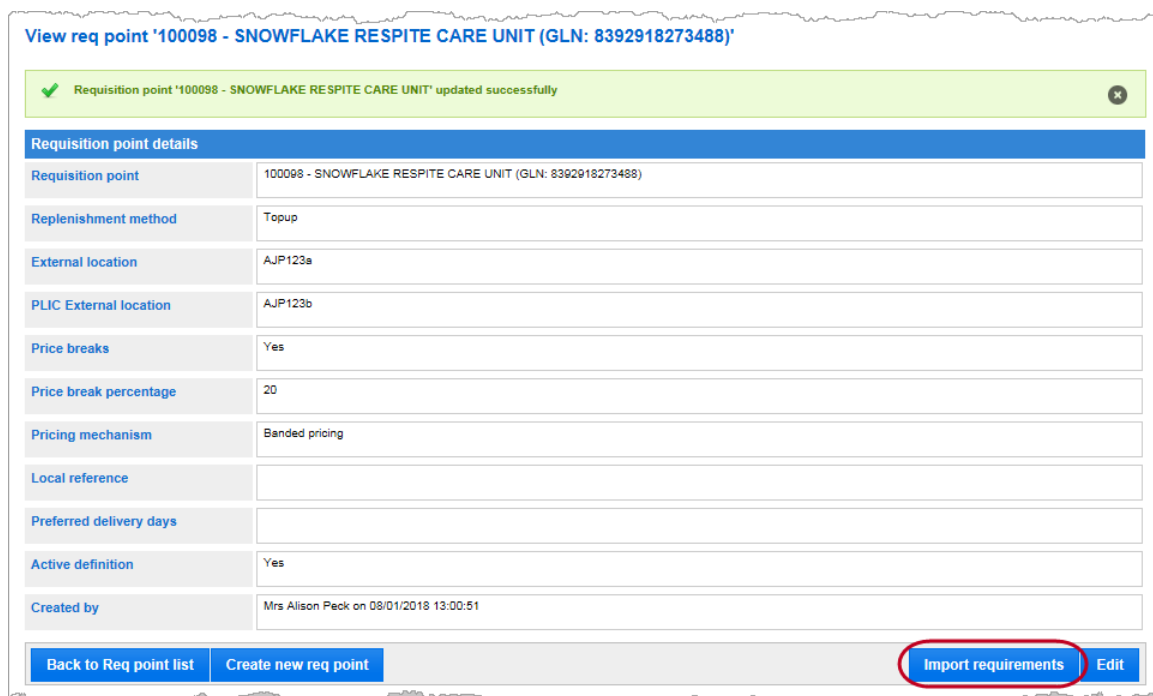
Details of the requisition point are shown.

- If you want to make any changes, click **Edit**.
- If you want to import (copy) a requirements list from another requisition point to this requisition point, you can do so at this point.

Import requirements

You can import (or copy) requirements from one requisition point to another. The option to do this is at the bottom of the requisition point summary page, which is displayed when you have just associated a requisition point with an MMD. The same page can be seen by clicking on the name of a requisition point in the list of those associated with an MMD.

When you have found the correct page, click **Import Requirements** at the bottom right of the page.
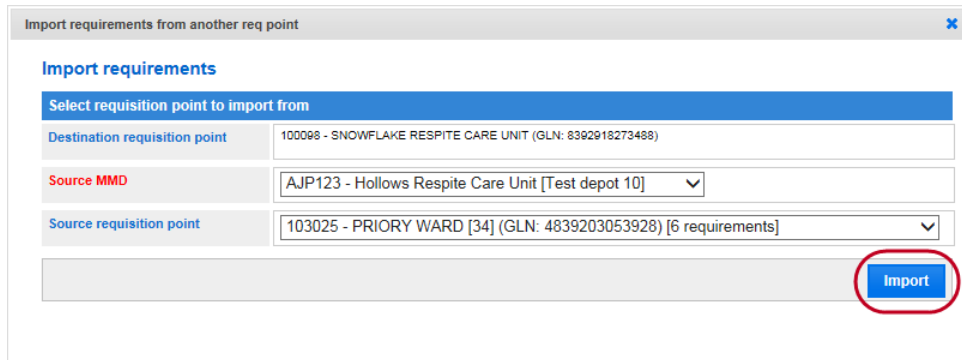
A box opens in the middle of the web page. Select the **Source MMD** and **Source requisition** point from the drop-down lists and click **Import**.

A message confirms how many requirements have been copied across.

Requirements will not copy across if either the product no longer exists in the catalogue *or* if the destination requisition point already has a requirement for that particular product.

Click the **X** in the corner to close the box.

Editing MMDs

Changes are not available for use by a device until they have been loaded using the eDC Android App's Comms screen.
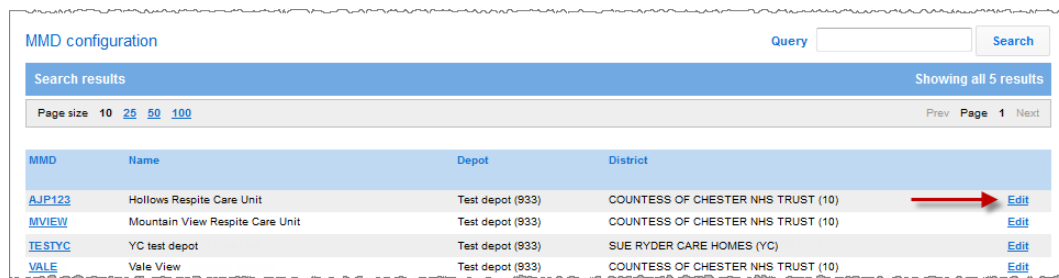
1 Select the MMD to edit. To do this you can either:

▪ Select the MMD from the **Home** page and then click **Edit** to the right of the MMD name in the menu bar.
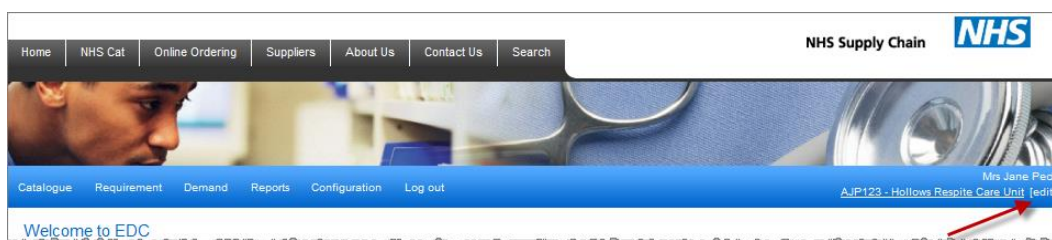
▪ Select **Configuration** and then **MMD configuration** from the menu.
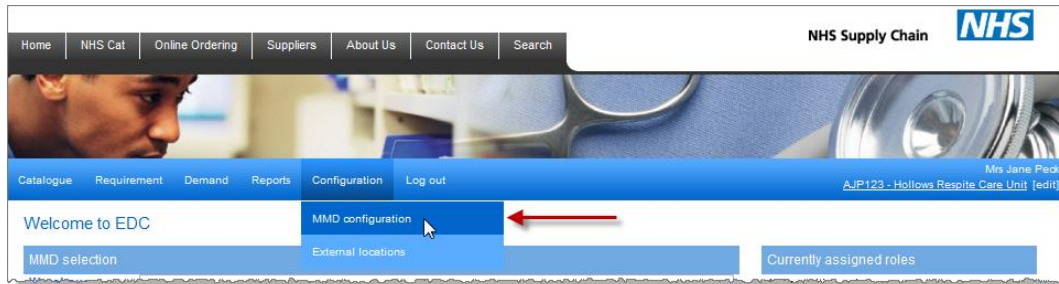
A list of MMDs is displayed. Find the one you want to edit and click the **Edit** link on the right of the row containing it.

Selecting an MMD to edit from this page breaks your association with the MMD you chose at log-on.

2   The **Edit MMD** page opens, showing details for the selected MMD.

You can change everything except for the **Depot** or the **District**.

3   Make any necessary changes and click **Save**.

Editing requisition point details

To change requisition point details:

1   Select **Configuration** and then **MMD configuration** from the menu. All the MMDs available to you are listed.

2   Click the code of the MMD linked to the requisition point you want to amend.

3   If you click the name of the requisition point, you can see details (including when it was created) but cannot make changes.

The **View MMD details** page for the selected MMD opens. No changes can be made to the details on this page.

All the requisition points assigned to this MMD are shown at the bottom of the page.

To find a specific requisition point, use the filter option at the top right of the requisition point list. If you click the name of the requisition point, you can see details (including when it was created) but cannot make changes.

4   To edit a requisition point, click **Edit** to the right of the row.

5   Make the required changes and click **Save**.

Moving requisition points to another MMD

If two MMDs in the same district share a catalogue, requisition points can be moved between them. Follow the instructions for 'Editing requisition point details' on page 30.

1   In the list of requisition points associated with an MMD, select the box in the **Move** column to the left of the requisition point you want to move.

2   Click **Move req points** at the bottom of the page.

3   Select the new MMD from the list displayed. Only those MMDs that share the local catalogue as the requisition point's current MMD are listed.
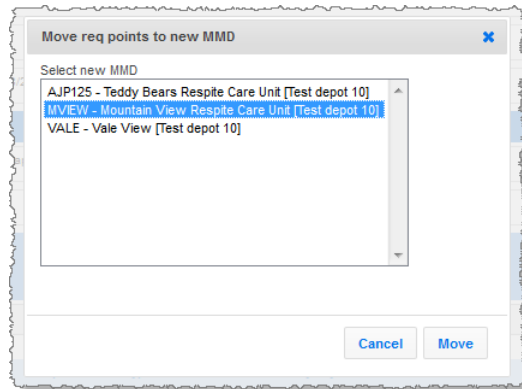
4 Click **Move**.

The requisition point is now associated with the other MMD.

Managing non-stock products
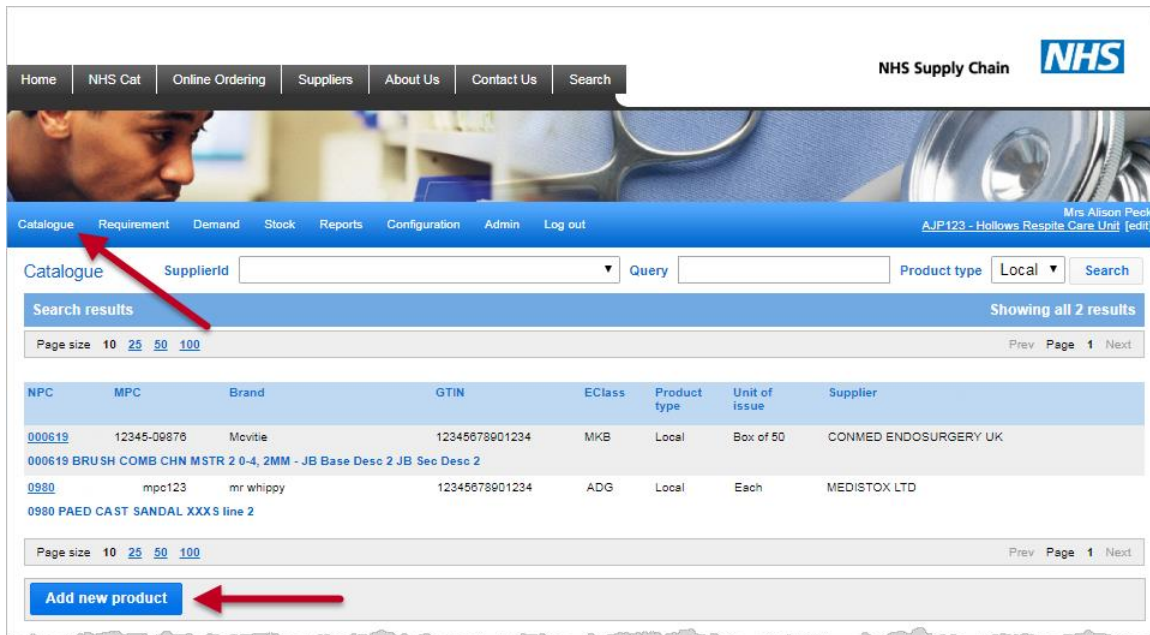
eDC can be used to manage ordering products sourced from other suppliers (not from NHS Supply Chain). This is done by using a local catalogue, which holds items you can order in addition to those supplied through the NHS Supply Chain.

The local catalogue

The local catalogue stores products your trust uses that are not supplied by NHS Supply Chain. You may have your local catalogue or share one with other requisition points around the trust.

Adding products to the local catalogue manually

Click **Catalogue** in the blue menu bar and then click **Add new product** at the bottom of the page showing the products.

The **Add a new product** page opens.

1   Type a code for the new product in the **Product code**.

You can use letters, numbers, or a mixture. The code cannot contain spaces, commas (,) or quotation marks (").

Add a new product

Product details	
Product code	
Base description	
Secondary description	
eClass	Select eClass
Brand	
GTIN	
Unit of issue	Select unit of issue
Units	1
Supplier	Select supplier
VAT rate	Zero rated
Contract reference	
Expense code	
Ad-hoc product	☐
Manufacturers code	
Lead time ⓘ	

Price details	Band 1	Band 2	Band 3	Band 4	Band 5
Quantity	0	0	0	0	0
Price	0	0	0	0	0

[Back to catalogue] [Replicate existing product]   [Save]

2 Complete the rest of the information using the table below. Mandatory information (fields that must contain an entry) is in red text on the screen and indicated with a red asterisk* in the table below.

You can optionally copy details from an existing product into this page, which you can edit before saving. See 'Replicating an existing product' on page 36.

Base description*	Up to 255 characters of text may be entered to describe the item.
Secondary description	Up to 255 characters of text may be entered to describe the item further.
eClass	This is used to assign a classification to the product for reporting purposes. Select from the list of codes available. Type a letter to go to that place in the alphabetical list (for example, type C to go to the first code beginning with C).
Brand	A maximum of 40 characters to specify the brand.
GTIN	A valid GTIN (up to 14 digits) that uniquely identifies this product.
Unit of issue*	Select the pack size from the drop-down box. Defaults to **Each**

Units*	Enter the number of units to issue. Defaults to **1**
Supplier	Select the supplier from the list. (see 'Supplier maintenance' on page 4141 for instructions on adding a supplier to the list).
VAT rate*	This should be set to the correct VAT rate for the product.
Contract reference	Enter if required.
Expense code	Enter if required.
Ad-hoc product	Select this option to be able to order this product through Online Ordering as free text. You can only have ONE ad hoc product per catalogue.
Manufacturers code	Enter a maximum of 30 characters as required.
Lead time	Enter as required.
Price	The price must include VAT.
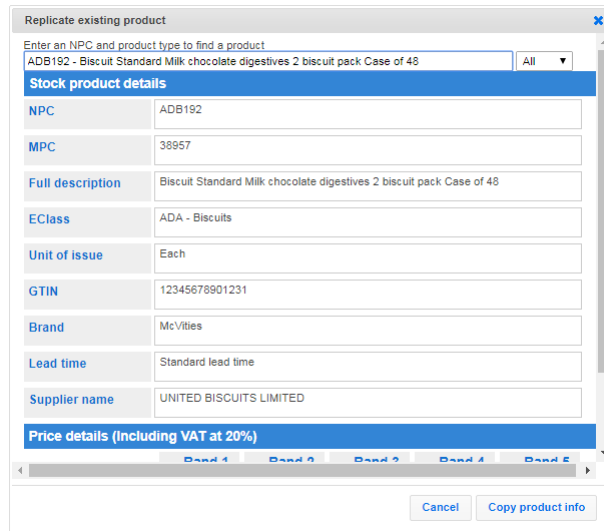
Replicating an existing product

To use details from an existing product as the basis for a new one, on the **Add a new product** page (see 'Adding products to the local catalogue', above):

1 Type a code for the new product in **Product code**.

2 Click **Replicate existing product** at the bottom of the window.

3 Using the drop-down list to the right of the search box, specify whether you are searching for **all**, **stock**, or **local** products.

4 Type the first few characters of a product code in the search box to display a list of matching entries. Any products from the local catalogue are shown in red.

5 Select the required product from the list shown.
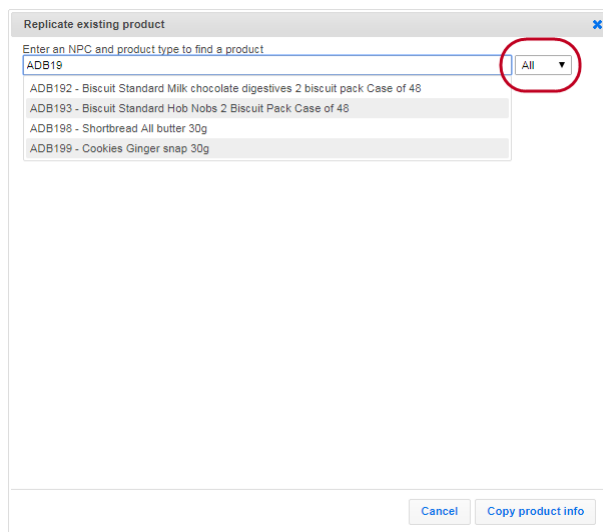
Details of the selected product are displayed.
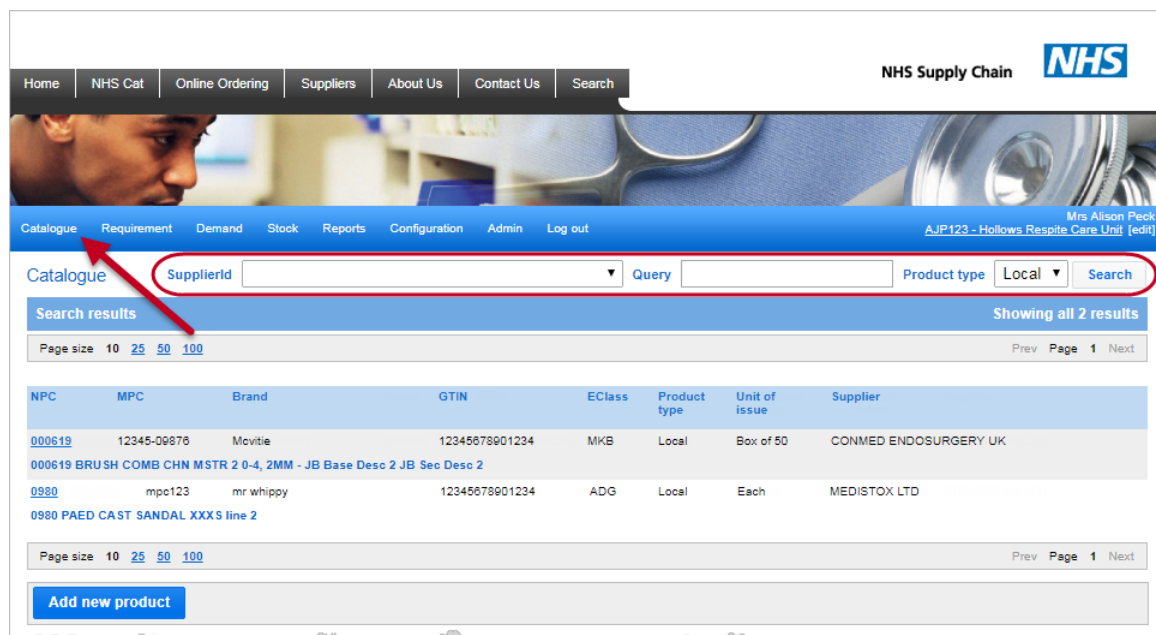
6 If this is the correct product, click **Copy product info**.

7 Make any changes to the details copied across or add others and click **Save**.

Searching for a product in the local catalogue

To search for a product in the catalogue:

1 Select **Catalogue** from the blue menu bar.

2 Specify whether you are searching for a **Stock** or a **Local** product (in **Product type**).

3 Optionally select a local supplier from the list to limit the results to products from that supplier.

The **SupplierID** option is only available if you are searching for local products.

4 Optionally type all or part of the product code in the **Query** box.

5 Click **Search**.

Amending a product in the local catalogue manually

To amend a product's details:

1 Find the product as described in 'Searching for a product in the local catalogue' (above).

2 Click the **Edit** button.

3 Make the necessary changes and click **Save Changes**.

Deleting a product from the local catalogue manually

To delete product details:

1 Find the product as described in 'Searching for a product in the local catalogue' (above).

2 When the product is displayed, click **Delete**.

3 You will be asked to confirm that you want to delete this product. Click **OK** to continue.

Deleting a product removes any corresponding requirements for that product.

Importing and exporting local catalogue entries

You must have the eDC local catalogue management role to export or import local catalogue entries.

You can export the current local catalogue for an MMD to a spreadsheet. This information can be amended (details changed, products added or deleted), and the spreadsheet imported back into the application.

1 Make sure you are currently associated with the appropriate MMD. Change this if necessary.
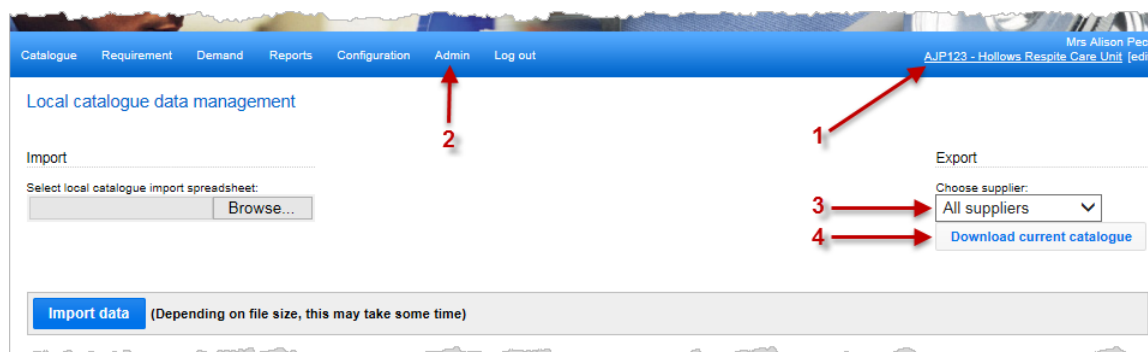
2 From the **Admin** menu, select **EDC local catalogue management**.

3 Optionally select a specific supplier to reduce the quantity of information exported.

4 Click **Download current catalogue**.

5 Choose whether to save the spreadsheet or to open it.

If the MMD is not associated with a local catalogue, or if the local catalogue does not contain any entries, an empty spreadsheet with the appropriate columns is opened to use as a template.

The format of the exported spreadsheet is compatible with Excel 2003 or later versions. If the spreadsheet contains more than 64,000 rows and you use Excel 2003, the export uses multiple sheets, each not exceeding 64,000.

Making changes to the local catalogue

The word in the **Action** column determines the type of change:

- **Add** adds the information in that row to the local catalogue.
  - Leave **UID** blank – the system supplies this number.
  - The value of **UOI Identifier** and **E Class** must match one of a set of acceptable values.

    Tip: The list of accepted values can be seen by clicking the down arrow to the right of a populated cell –take care not to change anything unintentionally.

    Alternatively, unprotect the sheet (on the **Review** tab), select the last cell in each of the above columns and copy it (or 'Fill Down') to empty rows. You can then select a value from the available list. Click **Protect Sheet** (don't change any settings) and click **OK** to prevent accidental changing of the **UID**.

  - The value of VAT must be one of:
    - › 0 (indicates 0% VAT)
    - › 1 (indicates 5% VAT)
    - › 2 (indicates 20% VAT)
  - If you specify a **Supplier** that does not already exist, a new supplier record is created using the information you provide.

  Complete the remaining cells in the row with appropriate information using existing rows and 'Adding products to the local catalogue manually' on page 34 as a guide.

- **Amend** changes to the requirement specified in the current row.

  Make any necessary changes using the information above and 'Adding products to the local catalogue manually' on page 34 as a guide, but do not change **UID** or **NPC**.

  Rows marked **Amend** but without changes do not affect anything. However, they take time to process, so consider deleting them from the spreadsheet for speed.

- **Delete** removes the entry from the catalogue and the requirements of any requisition points included.

Save the changes made to the spreadsheet.

To import the changes:

1   Make sure you are currently associated with the appropriate MMD. Change this if necessary.

2   From the **Admin** menu, select **EDC local catalogue management**.

3   Click **Browse** in the **Import** section on the left of the page and find the spreadsheet containing the information for importing.

4   Click **Import Data**.

If all the data in the spreadsheet is valid, you are asked to confirm that you want to update the catalogue.

Any suppliers that will be created because of the update are listed. If these are not required, click **Cancel** and correct the supplier details.
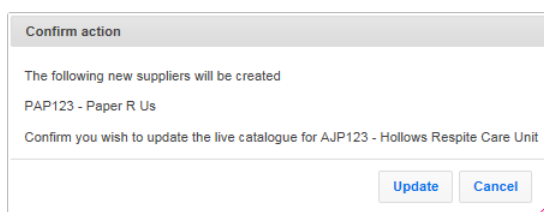
5   Click **Update**.

Invalid data

If invalid data is found, a message will appear, and you will be prompted to download a spreadsheet listing the errors.

1   Click **OK** to acknowledge the message.

2   Click **Download spreadsheet with errors**.

3   Save or open the spreadsheet.

The errors are listed in a column to the far right of the catalogue entries.

4   Correct the errors, save the spreadsheet, and import it again.

Supplier maintenance

When adding or editing the details for a product, new suppliers are added, and details for existing suppliers are changed.

Adding a supplier

1   Make sure that the **Supplier** box contains the **Select supplier**.

2   Click the **Add/edit Supplier** icon.

3 The **Supplier Details** box opens. Complete details for this supplier.

4 Click **Save**.

Amending an existing supplier

To make changes to the details of an existing supplier, select the **Supplier** in the drop-down list and then click the **Add/edit Supplier** icon.

The **Supplier Details** box shown above opens. Make any necessary change and click **Save**.

Creating external locations to receive information exported from eDC

Information can be exported from eDC if you use it with your organisation's purchase order system.

> If you are using eDC Gold, you can also export information for your PLIC system – see 'Specifying external locations for PLIC information' on page 46.

Using eDC with your purchase order system

If you use eDC to order non-stock items via your organisation's purchase order system, you must specify a destination for the file containing the order details. The file will be stored here until it is processed.

Your local IT department must provide the **IP address** and port number. You must also agree on the Username and Password to be used with them. NHS Supply Chain and the trust's network will require firewall changes to allow the connection between servers. Contact the NHS Supply Chain Helpdesk for assistance.

NHS Supply Chain will agree on the **Feed type** and **Filename** with your organisation and will now only allow SFTP-type connections.

1 From the **Configuration** menu, select **External locations**.

   Any external locations currently associated with this MMD are shown.

2 Click **Add new external location** at the bottom of the page.

3 Complete the details for the external location (see image overleaf).
   - **External Location** – the name you wish to give this location. Consider basing the name of the external location on the MMD name, so it is easily identified when linking it.
   - **Feed category** – select **Purchase order** for standard eDC.
   - **FTP Server Protocol** – select the protocol from the list agreed with your local IT department.
   - **IP Address** and **Port Number** – the IP address of the machine to which you are sending the data and the port number on which it listens for the file.
   - **Depot** and **District** display the information associated with the MMD you chose when logging onto eDC. These cannot be changed.
   - **Feed type** – (shown when the **Feed category** is **Purchase order**) the feed format, which is agreed between the organisation and NHS Supply Chain.

- **Include NHS Supply Chain sales order number** – enabling will add the NHS Supply Chain sales order number to the feed. The receiving system will need to be configured to receive this information.

- **Username** – this is the username of the account on the computer to which you are sending the data.

- **Password** – the password associated with the user account.

- **Filename** – the name of the file to be sent is agreed between your organisation and NHS Supply Chain. Suffixes are automatically generated. Select the required suffixes from the drop-down list in the order in which they should be appended to the filename.

- **Batch transmission** and **Transmission hour** – enables you to combine all your daily requisitions into a single file and send it at the specified time. If you do not select Batch transmission, a file will be sent automatically whenever you process the demand.

- **Active** – should always be selected if files are sent to this location.

Any changes to an already established connection will require the password to be re-input. It cannot be saved without the password. Inputting the incorrect password will prevent the connection from working.

4   Click **Save Changes**. A summary of the details you have recorded is shown.

From here, you can create another location (**Create new external location**), **Edit** this one if you have made a mistake or view the list of locations (**Back to location list**).

You need to associate the external location with requisition points for it to be used – see 'Editing requisition point details' on page 30.
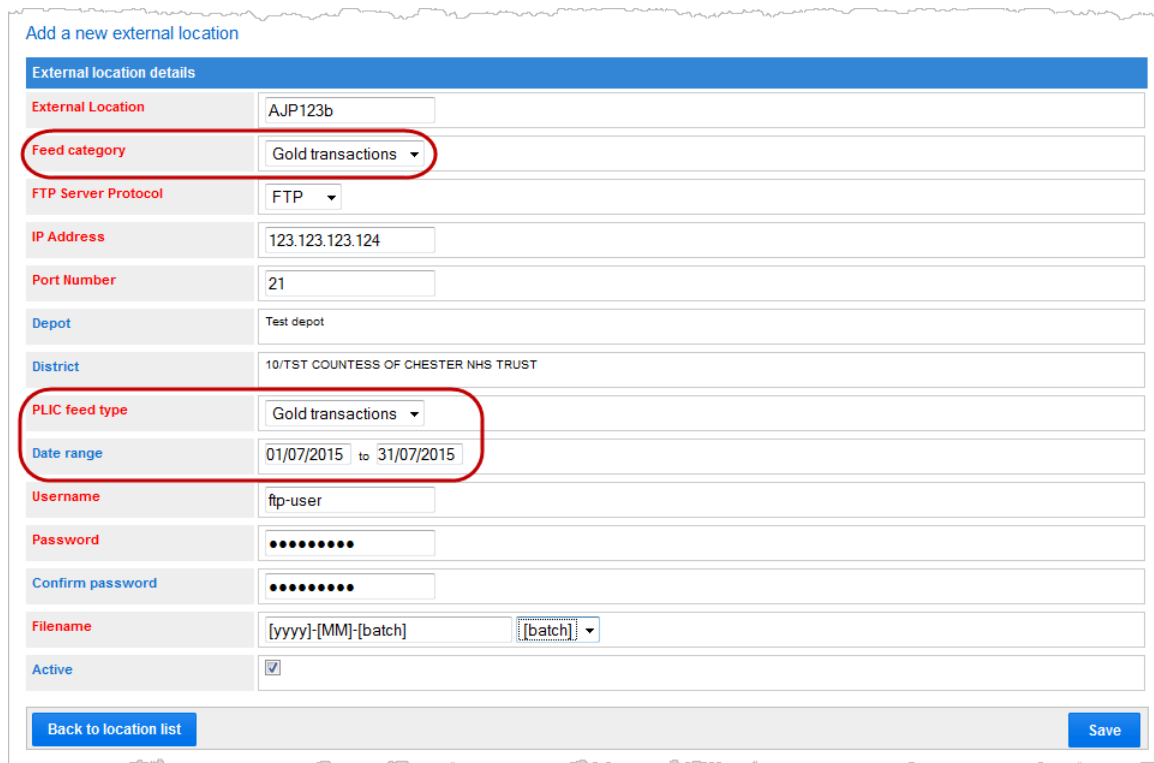
For Extended CSV feed types there is a check box to **Include NHS Supply Chain sales order numbers**. Once enabled processing demand for external Non-NHS Supply Chain stock will now show the NHS Supply Chain sales order number.

Specifying external locations for PLIC information (G)

If using eDC Gold, you can specify an external location for PLIC (Patient Level Information and Costing) information.

To create external locations for PLIC information, follow the instructions in 'Using eDC with your purchase order system' on page 43, with the following differences:

1   In **Feed category**, select **Gold transactions**.

2   In **PLIC feed type** (which replaces **Feed type**), select **Gold transactions**.

3   In **Date range**, specify the date of the earliest and latest transactions to include.

Information is generated for all requisition points associated with this feed and submitted to the FTP site 5 minutes after saving the page. Changing the information recorded about this location—for example, changing the date range—generates a new set of information.

This is not an automated service. Every time a feed is required, this page needs to be saved with the requested date range and FTP account password.

Amending and deactivating external locations

To amend an external location:

1 Select **External locations** from the **Configuration** menu to show a list of locations.

2 Click **Edit** to the right of the location you want to amend.

Location	Feed type	FTP Protocol	Transmission time	Created		Active	
EL1	CSV full	FTP		PECKA on 27/02/2013 13:18:40		Yes	Edit
Add new external location							

External locations within MMD 'AJP123'

3 Make your changes and click **Save**.

To deactivate an **External Location**, edit it and remove the tick from the **Active** box. **Save** the change.

Requirements

Before you can order a product using eDC, it must be linked to a requisition point and allocated a stock level (depending on which replenishment method you are using). This is known as setting a requirement.

Viewing existing requirements

Select **Requirement** and then **Summary** from the menu.
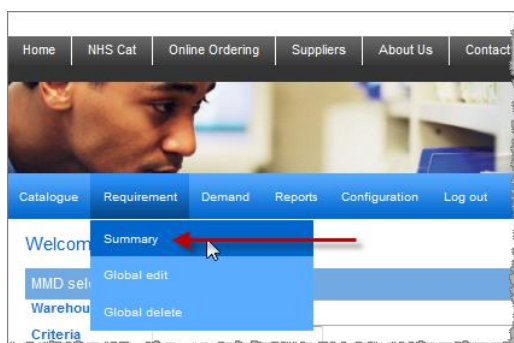
A list of requisition points assigned to the selected MMD is shown. The replenishment method and the number of products recorded as requirements associated with each requisition point are displayed.

The filter at the top of the screen allows you to reduce the quantity of information displayed. You can filter to show only:

- **Stock** products (supplied by NHS Supply Chain), **Local** products (ordered from the local catalogue), **Missing product** (no longer exist in the catalogue), **Unauthorised** (products that have not been authorised) or **Inactive** (inactive requisition points).

- A particular product is specified by selecting **Product** (the product's NPC) or **GTIN** and typing the relevant code in the box.

- A particular requisition point is specified by selecting **Reqpoint** (to give the requisition point code) or **GLN** and typing the relevant code in the box.

Requisition points without associated requirements are excluded from the list unless you select the **Display all** option and click **Filter**.

After creating a new Requisition Point in eDC, by default, no requirements are associated with it, so it is not shown in the list. The Display all option must be selected to see any new Requisition Points.
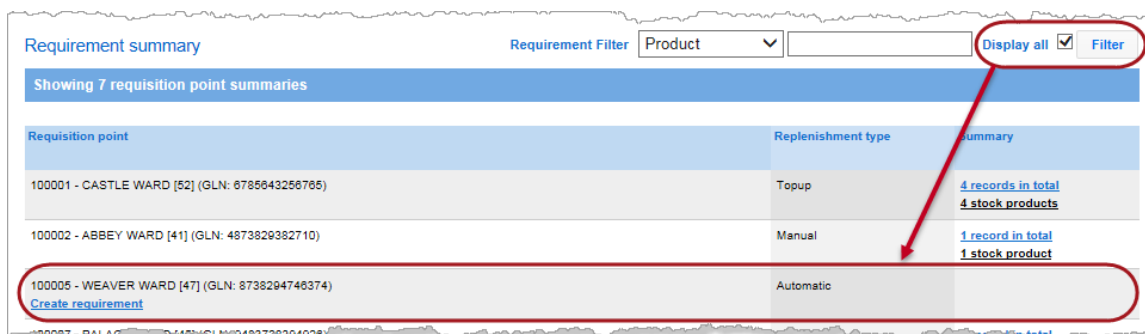
The currently applied filter is shown at the top left of the page. Click **Show all** to view all requisition points and summary links.
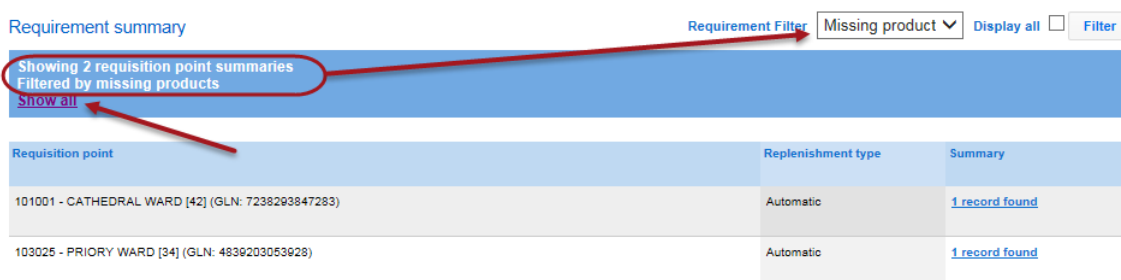
Adding requirements to a requisition point

Requirements can also be imported from a spreadsheet – see 'Importing and exporting requirements'' on page 63 for details.

Requirements are added using the **Requirement summary** page - select **Requirement** and then **Summary** from the menu.

How you add requirements to a requisition point varies depending on whether it already has any associated requirements.

■ To add requirements to a requisition point without any existing requirements:

   a   Select **Display all** and click **Filter** to include this requisition point in the list.

   b   Click **Create requirement**.

- To add requirements to a requisition point that already has some associated requirements, click **… records in total** on the right of that requisition point.

Click **New requirement** at the bottom of the list of existing requirements.
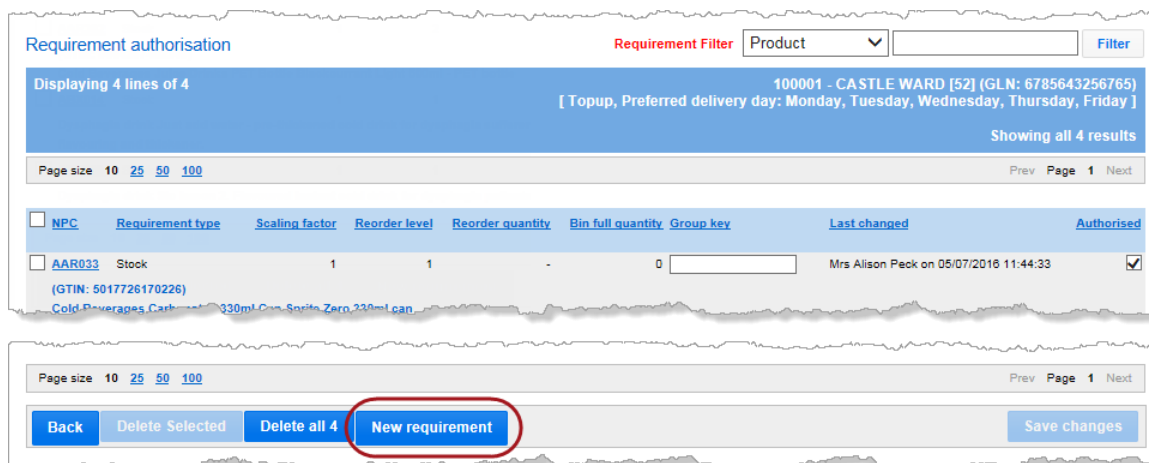
The **Create requirement** page opens. The placeholder text 'Search for a product' is selected automatically – type a product code to find a product to add as a requirement.

If you click away from this field, you must select or delete the placeholder text before starting to type a product code.
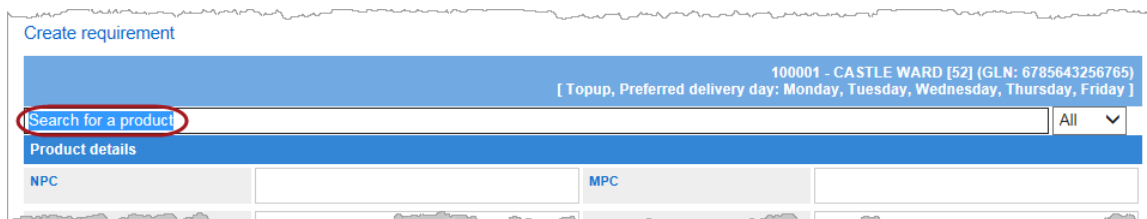
1   You can optionally choose to search for Stock or Local products matching the code you are going to type—the example above searches for **All** (both stock and local products).

2   Start typing the product code to replace the 'Search for a product' text. You can type up to the first 6 characters of a product code and use the wildcard character (%) to represent unspecified characters.

You must type at least three characters (not including the wildcard) to search the main catalogue. Entering fewer than three characters only displays results from the local

catalogue. This is because the main catalogue is so large that it would take too long to show the results from such a wide search.

For example:

- If you type **AAR** all product codes beginning with AAR are displayed. (You don't need a wildcard when you are typing the beginning of the code.)
- If you type **%R14**, all product codes that include R14 but do not *begin* with R14 are displayed.
- If you type **AB%4**, all products with codes that begin with AB, then have one or more unspecified characters and include a 4 are displayed.
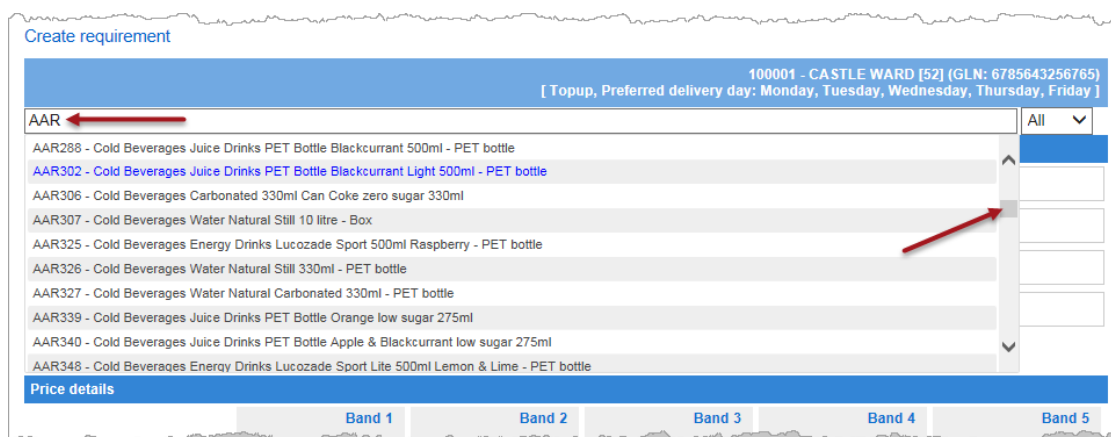
3   Review the list of products, using the scroll bar to view those further down the list.

- Blue text indicates any products for which a requirement has already been specified. Click the blue text to go to the **Edit requirement** page.
- Red text indicates local products that are not already a requirement.

If you type fewer than three characters and no products from the local catalogue match your search, the statement 'Only showing local products' is displayed. Typing more characters may find matches from the main catalogue.

4   Select the product you wish to add.

The top two sections of the page are completed automatically with information about the product – check carefully to make sure you have selected the correct product.

If a Required item is Masked in the Online Catalogue at either the Trust or Requisition Point level, there will be a notification on the screen informing that the product is masked. This is for informational purposes and doesn't prevent the items from being ordered. A user with the eDC Requirement Authoriser role takes the responsibly to approve that product can be ordered.

> ### What is a scaling factor?
>
> Pack sizes can be large; for example, you may use a product that is supplied in packs of 1,000 items. You may not want to wait for that pack to be finished before you reorder, as this may mean you completely run out. If a single pack of the product lasts quite a long time, you also do not want to order more of the product too soon.
>
> To deal with situation, you can set a stock level *within* a pack size that will trigger reordering. For example, you can decide to reorder when you have a stock of 50 left within the final pack of 1,000 by setting a scaling factor. The scaling factor value defaults to **1**.
>
> To use the scaling factor to help manage your stock levels, enter the pack size in **Scaling factor** (following the current example, enter 1000). The **Reorder level** you set must correspond to the number of products in the pack size. For example, specifying 50 will trigger the generation of an order when the stock level reaches 50 individual items.
>
> The system will automatically round up a **Reorder quantity** that is not a multiple of the pack size units. This means that if you set the **Reorder quantity** to 1500 (for the current example), the system will round this up to 2000.

5 Set a **Scaling factor** if appropriate or leave it at the default of 1 (see 'What is a scaling factor?' at the top of the page).

6 The options available now depend on the replenishment method you are using – see 'Replenishment methods' on page 26 for an explanation of the different methods.

If you are using eDC Gold and choose to **Auto process** orders (see page 76), **Reorder level** and **Maximum stock level** are only applicable if you are using the top-up replenishment method *and* issue the product in the same units as you receive it (pack, case or individual items).

- **Top-up ordering**

   In **Reorder level**, type the minimum quantity of the product you want to hold in stock – the exact number is shown alongside **Maximum stock level**.

- **Automatic ordering** and **Manual ordering**

   In **Reorder level**, type the minimum quantity of product you want to hold in stock and **Reorder quantity**, type the number you want to order when that minimum quantity is reached. The sum of these (**Reorder level** + **Reorder quantity**) is displayed in the **Maximum stock level**.

   Reorder level and **Reorder quantity** are used to generate demand for automatic replenishment. They are used as guidance for manual replenishment and are not shown when generating demand.

   Informed ordering provides greater visibility on whether an item is **In stock** or **Out of stock**. Please note that this will not guarantee to satisfy demand and should only be used as an indicator. The following are excluded from informed ordering: - Internal, External, Blue Diamond, e-Direct, Suspended and No longer available items.

7   **Bin Full Quantity** is for information only. You can either leave it blank or record the quantity of an item that can be held at a store as a guide. This figure is printed on the bar codes.

8   In the **Group key**, type a stock location for the product. This can be up to 15 characters long, such as A101 shelf A, row 1, item 1.

9   If you have the **Requirements Authoriser** role, any new requirements will be automatically authorised, and a tick will appear in this box.

   If you do not have this role, your requirements must be authorised by someone who does.

10   **Internal item**—Select this option if a local catalogue item comes from an internal store (for example, CSSD or a linen store).

   Either select the internal supplier from the list shown or follow these steps to create a new supplier:

   a   If the supplier is not on the list, click the **Create/Edit Supplier** button.

b Complete details for the internal supplier.

c Click **Save**.

11 Click **Save changes**. Continue adding products for this requisition point until all required stock has been included.

When the **Email Internal Demands** option is enabled, the system will email each Internal Supplier's email address with a list of Products ordered. This can be used as a "picking list" for Internal Stores to supply the products to the relevant Requisition Point.

Amending and deleting existing requirements manually

Requirements can also be changed or deleted by exporting them to a spreadsheet, making changes and then importing the data. See 'Importing and exporting requirements' on page 63.

To change or delete requirements using the web application, go to the **Requirements summary** page (select **Requirement** and then **Summary** from the menu). On the right of each requisition point is a group of links showing the number of requirements recorded for that requisition point.

25 records in total
3 stock products
21 local products
1 missing product

Up to four links may be shown, depending on what has been specified for that requisition point, which breaks down a total number of products into three categories (stock, local and missing).

Local products include both externally and internally supplied products.

If a filter is applied, only those requisition points that match the filter are listed, and the records also match the filter condition. In the example below, only requisition points with Stock products are listed, and the link to the number of records indicates the number of stock product records.

Click a link to open the **Requirement authorisation** page. This is the same page from which you access the **New Requirement** option to add more requirements to a requisition point.

Stock products have a **Requirement type** of **Stock** (as shown above). Local products have a **Requirement type** of either **Internal** or **External**.
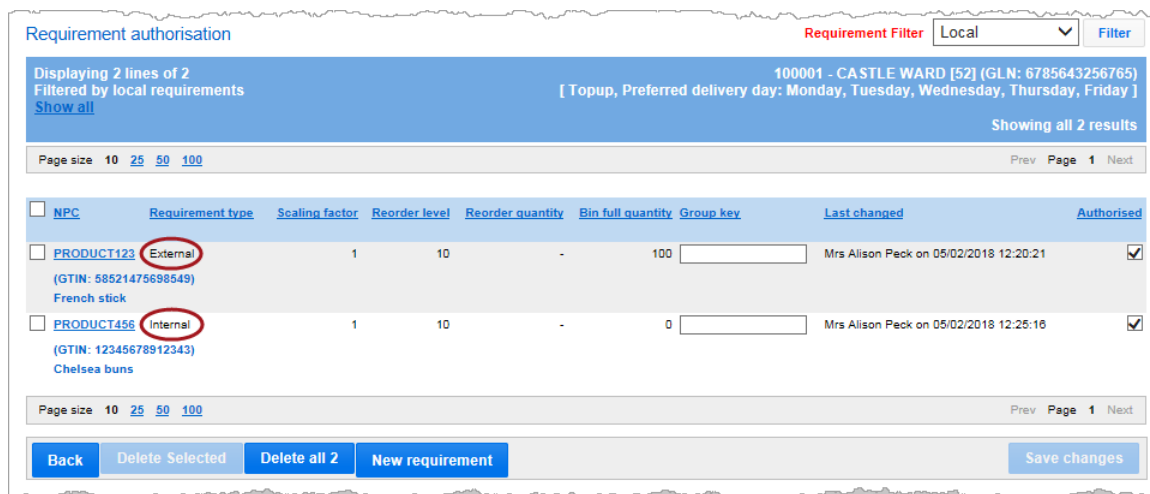
Amending existing requirements

1 Click a product code to open a page showing that requirement's details.

- The top of the page shows information about the product that cannot be changed.

- You can change information in the lower part of the page – see the instructions in 'Adding requirements to a requisition point', which start on page 49, for more detail.

2 Click **Save changes** or click **Back to summary** to discard the changes you have made.

The **Save changes** button is disabled until you have made a change.

Deleting existing requirements

Go to the **Requirements authorisation** page as described in 'Amending and deleting existing requirements' on page 50. From here, you can delete some or all of the requirements associated with a requisition point.

Delete all of the requirements

Click **Delete all [nn]** where **[nn]** represents the total number of requirements – in the example below, this is **11**.
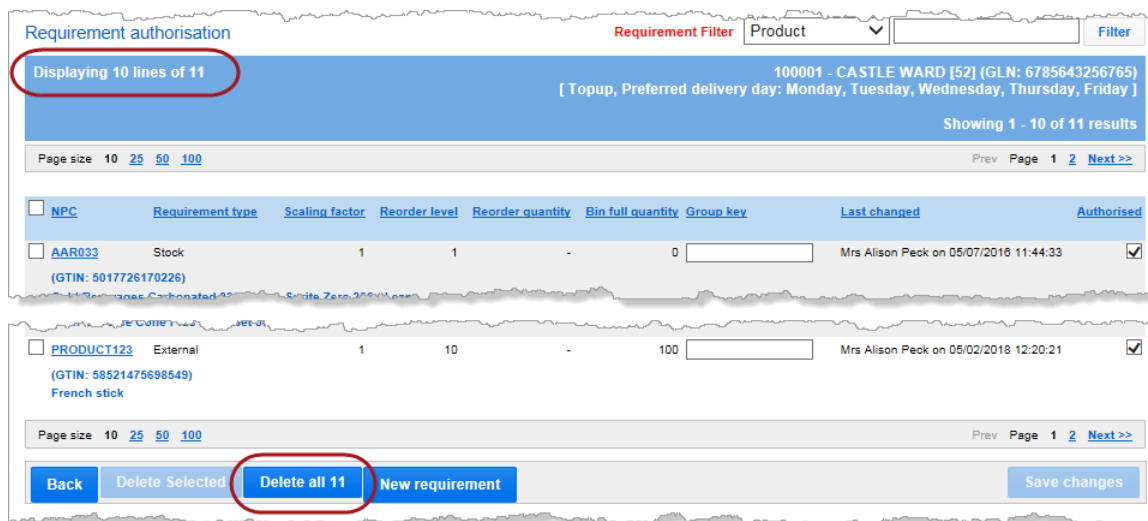
You can only see the requirements that fit on a single page but **Delete all [nn]** will delete *every* requirement.

You are asked to confirm that you want to delete all the records – click **OK** to continue.
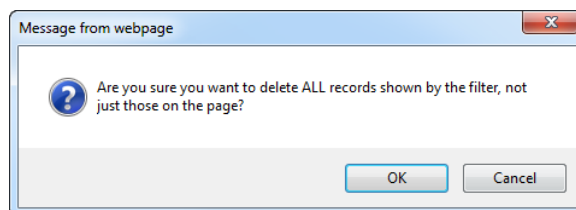
Delete selected requirements

Click boxes to the left of individual product codes to select them or click the box in the column heading to select all boxes on that page.

The **Delete selected** button is disabled until at least one product has been selected.

Clicking the box in the column heading only selects the products on the current page.

Removing invalid codes

Products are occasionally withdrawn, leading to existing requirements that no longer correspond to anything in the product catalogue.

These products are counted as 'missing products' on the **Requirements summary** page.

Click the link to open a page containing only these products.

Delete them in the same way you would any other requirements (see 'Deleting existing requirements' on page 56).

Making changes across multiple requisition points

Changes sometimes affect multiple requisition points. For example, a product may be withdrawn, or your organisation may decide to switch brands, and you need to change every existing instance of a requirement for that product with one for the product your organisation has chosen in its place. The **Global edits** option (and **Global deletes**) enables you to make and apply changes to multiple requisition points.

Changing products across multiple requisition points

To replace all requirements for one product with requirements for another across the entire MMD, use **Global Edit**.

You can use **Global Edit** to replace one product with another or multiple products with the same product.
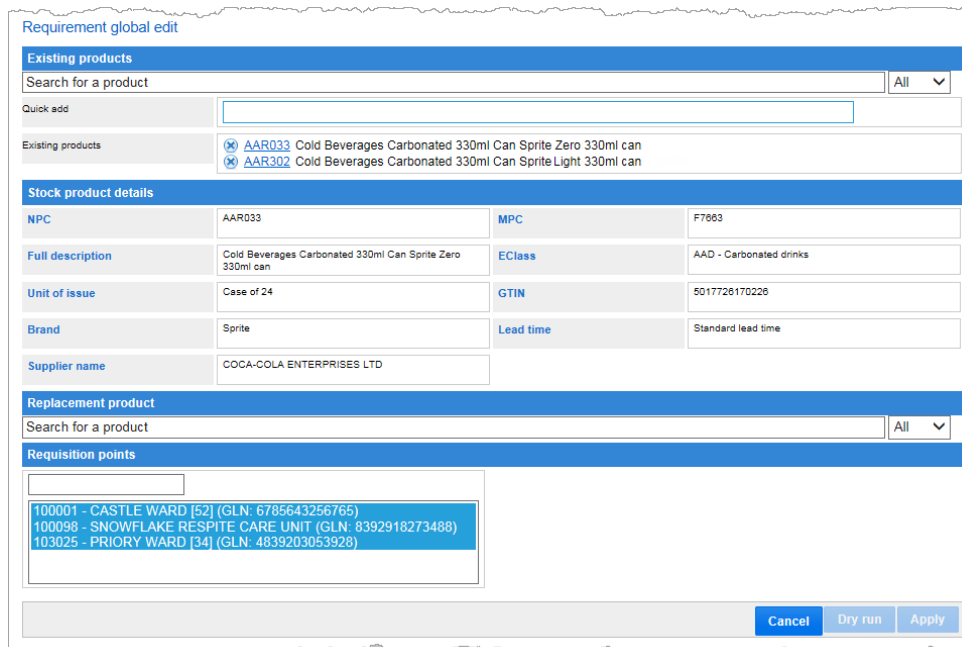
To replace products:

1   Select **Requirement** and then **Global edit** from the menu.

2   You can either search for the product you want to replace or use its product code.

   ▪   To use known product codes, type them into the **Quick add** box. Use a + symbol to indicate that a code is a local product code.

   All the products you select can be replaced with a single product.

   Click or tab to move out of the **Quick add** box. The product codes you have entered are listed in the **Existing products** box.

- To search for a product, click on 'Search for a product' and type the code of the product you want to replace. This works the same way as adding a requirement (see page 50): select the product you want to replace from the list shown.

3 You can continue adding products if you want to replace several products with a single alternative. The details displayed in the middle of the page correspond to the product just found (see image above).

- To view details of one of the other products, click the link that is the product code.
- To remove one of the products (so it is not replaced), click the ⊗ to the left of its code.
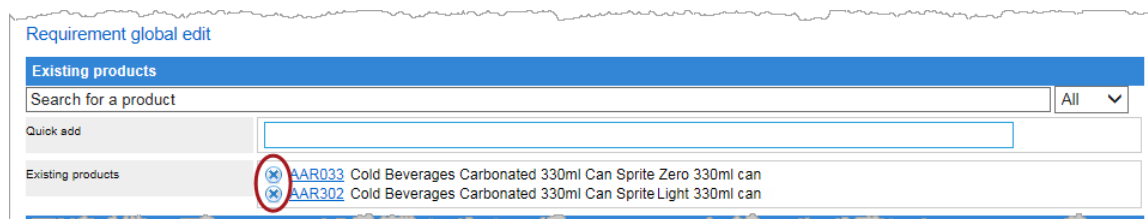
4 In **Replacement product**, type or search for the replacement product code.

Product details for this product are displayed.

5 The requisition points that have a requirement for the original product are shown. All requisition points will be changed unless you change the selection.

- Hold down the CTRL key and click individual requisition points to exclude them.
- Use the search box above the list of requisition points to search for a particular requisition point.

6 If your replacement product is a local product, a new option is shown that enables you to select a supplier for that product. For example, your replacement product may be supplied by CSSD.

If you select a supplier, the product is created as an internally sourced product.
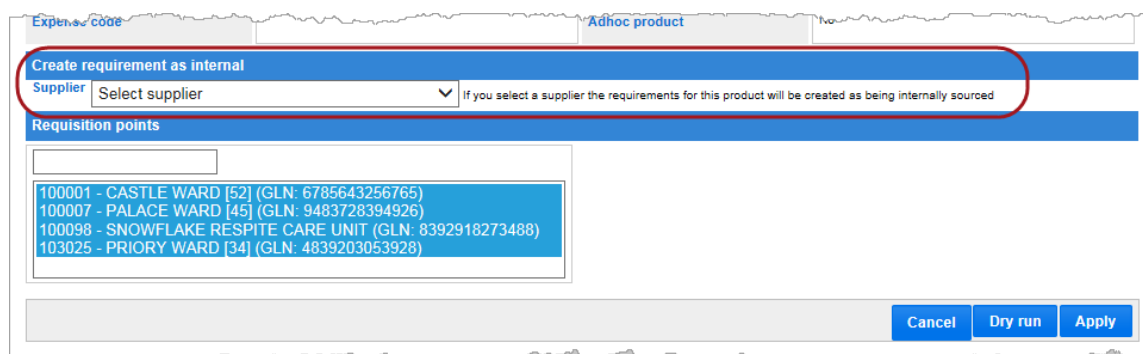
7 Click **Apply** to replace the existing product with the replacement product in all selected requisition points.

To identify the changes that would be made without making them, click **Dry Run** instead of **Apply**.

8 A confirmation message is displayed. If all the requested changes were not possible, the message will be different. See below for examples.
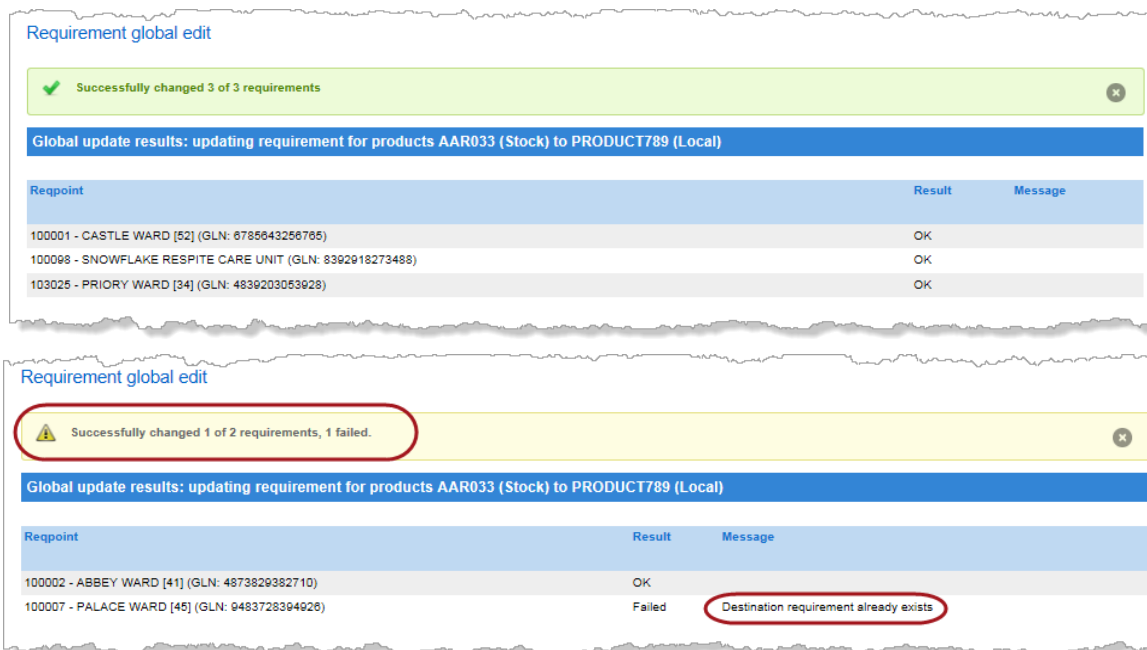
Unit of issue pack size changes are calculated, and stock levels are automatically amended when the change is saved. A message like this one is displayed in the top right corner of the page.

Scaling will be applied
Requirement values for 'PRODUCT789' will be scaled by a factor of 12.00

If you are replacing more than one product and their pack sizes differ, a message like the one on the right is shown as well.

Conflicting units of issue
The existing products have differing units of issue, scaling will be based on the stock product whose details are displayed (AAR302)

The demand type will be changed automatically to reflect the status of the new product:
S = Stock product, **E** = External local product, **I** = Internal local product

Deleting products across requisition points

To delete a requirement for a particular product from all requisition points *without* replacing it with another, use the **Global delete** option.

1 Select **Requirement** and then **Global delete** from the menu.

The page displayed is very similar to the one for changing a product using **Global edit**, without the option of specifying a replacement product.

2 Type the NPC code or search for the product you want to delete and check the details in the same way as when adding a requirement or replacing a product.

The possible matches are those products that are current requirements.

3 Select the product you want to delete. Information about it is displayed in the **Stock product details** and **Price details** sections. This information cannot be changed here – it is shown for you to confirm that you have selected the correct product.

4 Requisition points that have the original product as a requirement are listed at the bottom of the page, and initially, all requisition points are selected.

To change which requisition points are selected, you can do any of the following:

- Hold down the CTRL key and click requisition points to deselect them.
- Click any one of the requisition points, then hold down the CTRL key and click others to select multiple requisition points.
- Click any one of the requisition points, hold down the SHIFT key and click another to select all requisition points between them.

5 Click **Delete** and the following screen is displayed, showing that the requirements have been successfully deleted.

Importing and exporting requirements using a spreadsheet

You must have the eDC Requirement Authoriser role to import and export requirements.

The format of the exported spreadsheet is compatible with Excel 2003 or later versions. If the spreadsheet contains more than 64,000 rows and you are using Excel 2003, the export uses multiple sheets, each not exceeding 64,000 rows.

To export a requisition point's requirements to a spreadsheet:

1 Select **Admin** and then **EDC Imports** from the menu.

The **Import** and **Export** options available depend on your role.

2 Select the appropriate requisition point from **Req Points**. You can only see the requisition points associated with the current MMD.

If you are using eDC Gold, the requisition point defaults to the one linked to the current store but can be changed.

3 Click **Download req point stock requirements**.

4 Choose whether you want to open or save the spreadsheet.

If the selected requisition point does not have any requirements, a spreadsheet containing all the column headings and the sample rows of data is exported as a template.

Making changes to the listed requirements

You can add, amend, and delete requirements by importing a single spreadsheet.

The type of change is determined by the word in the **Action** column:

■ **Add** adds the information in that row to the requirements for the requisition point.

Leave **UID** blank – the system supplies this number**.**

Complete the remaining cells in the row with appropriate information using the example rows as a guide.

■ **Amend** changes to the requirement specified in the current row.

Make any necessary changes but do not change **UID** or **NPC**.

Any rows marked as **Amend** but without changes do not affect the requirements information for that requisition point. However, they do take time to process so consider deleting them.

■ **Delete** removes the entry from the requisition point's requirements.

Save the changes made to the spreadsheet.

Importing the changed requirements

To import the changes:

1 Select **Admin** and then **EDC Imports** from the menu.

2 Select the appropriate requisition point from **Req Points**. You can only see the requisition points that you have access to, and this defaults to the requisition point you are logged in to.

3 Click **Browse** to the right of **Requirement imports** and find the spreadsheet containing the information for importing.

4 Click **Import Data**.

5 Confirm that you want to import the information in the spreadsheet.
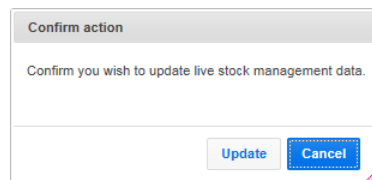
If the spreadsheet contains invalid rows, those rows are not imported.

A message indicates how many rows were imported, how many failed and how many blank rows were in the spreadsheet. The example message below contains a line for imported

requirements. Imported stock definitions (eDC Gold only) and barcodes are shown in the same way.
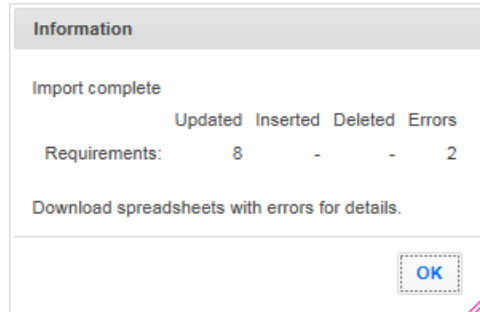
If there are any errors, click **OK** to acknowledge the message and then download the appropriate spreadsheet containing error information.
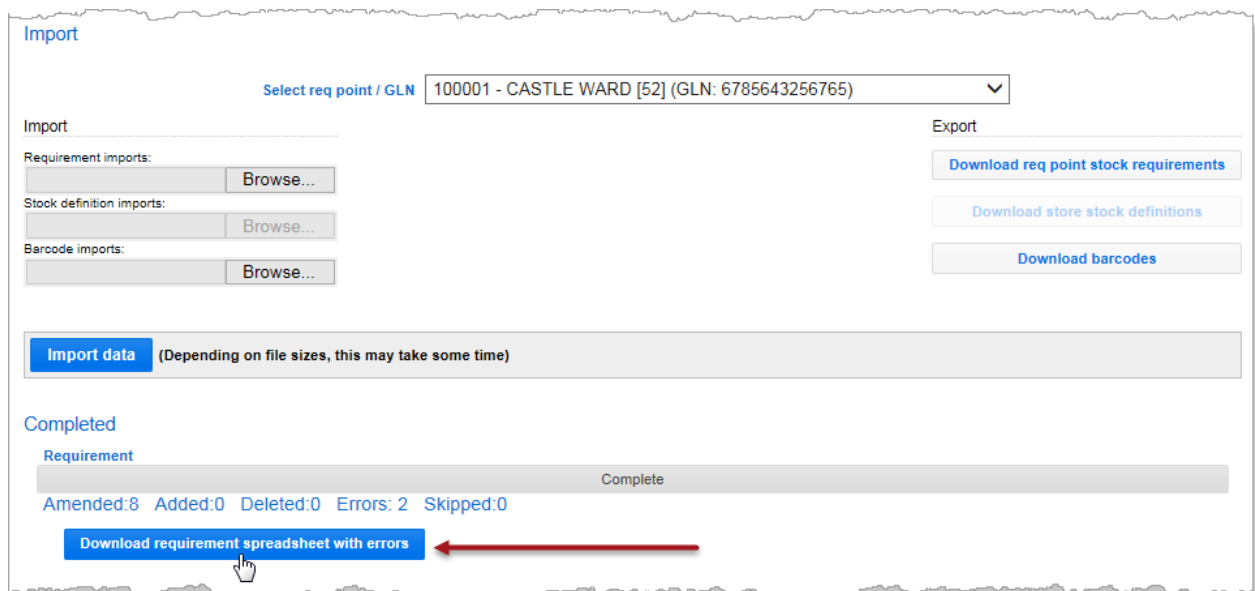
The downloaded errors spreadsheet only contains rows where errors were identified. Details of the error are shown in a column on the far right.

Correct the errors and re-import the spreadsheet.

	A	B	C	D	E	F	G	H	I	J	K	L	
1	Stock requirements										NHS Supply Chain		
2													
3													
4													
5													
6													
7	Action	UID	NPC	Product type	Internal	Reorder level	Reorder quantity	Bin full quantity	Scaling factor	Group key	Supplier ID	Authorised	
10	Amend	10399868	ABX014	Stock	No	1		0	a			Yes	Invalid Scaling factor
11	Add		TEST1234	Local	No	%		0	2			Yes	Invalid Reorder level
12													
13													
14													
15													
16													

Stock requirements 1

Managing stock (G)

You need the eDC Stock Management role if you want to use eDC Gold to manage your stock. This role can only be obtained if you are using eDC Gold.

Use eDC Gold to manage your stock, monitor stock levels and track the locations of expensive equipment. To do this, you need to define the products you want to manage, places where they can be held and any other information you want to monitor (such as expiry dates).

Managing places where stock is held (G)

The top option on the **Stock menu** is **Manage hierarchy**—this is where places (and people) with 'stock' are defined.
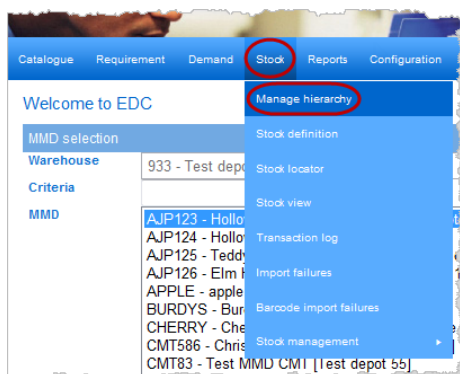
The left of the page shows existing locations for an MMD. On the right, there is a key to the various icons and a list of options for making changes.
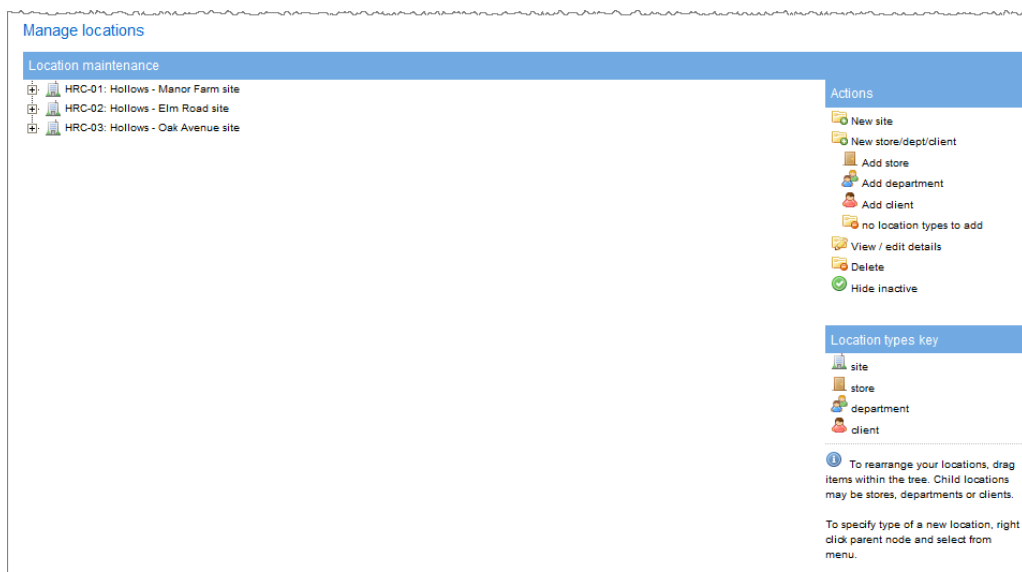
If no sites or stores are associated with your current MMD, the left side of the page is blank.

Creating a new site (G)
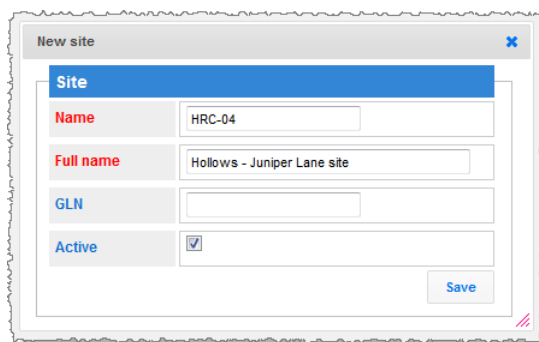
You must create at least one site to use eDC Gold to manage stock.

A site is either a physical location or a 'virtual' building used to group related stores. It may be a hospital, a campus, or a storage facility. A site is a subdivision of an MMD, and you must be logged in to an MMD to create a site.

You can only *issue* stock to departments (see page 71) or clients (see pages 72) that belong to the same site as the store to which you are currently logged on. You can *transfer* stock to stores in any site to which you have access.

To create a site:

1   Click **New site** in the list of actions on the right of the page.

2   Complete details for the site in the box that opens.

- The **Name** of the site can be a maximum of 6 characters – it is used to identify the site on reports and on the device, so needs to be concise.
- The **Full name** of the site is much more descriptive – but keep it brief.
- The **GLN/GTIN** is a unique number that identifies your site. Your organisation's administration may give you details of this. If recorded, it must be a valid 13-digit number.
- **Active** is selected by default – this site will be available for use as soon as it has been saved.

3   Click **Save** and the new site is shown as part of the hierarchy.

Creating a store (G)

A store is a requisition point that uses stock management. It may be a ward or a central store that supplies wards and departments internally. It is usually a physical location.

- You must create at least one store to use eDC Gold.

- Each site must contain at least one store, or you cannot transfer stock to it.

- You must select a store when logging on, so you cannot issue stock to a department or client on a site without one.

- A store may be associated with one or more physical locations. For example, an outpatient department may have a storeroom but there may also be stock in individual consulting or treatment rooms.

To create a store:

1 Select the site within which you want to create the store.

2 Click **Add store** in the list of actions on the right. The **New store** box opens.

3 Record details that identify the store:

   - The **Name** of the store can be a maximum of 6 characters and is used to identify the store on reports and on the device.

   - The **Full name** of the store can be more descriptive – but keep it brief.

4 **Bin mask** is not currently used.

5 Specify general requirements for products received into and issued from this store. These are used if no product-specific information is recorded.

   - **Shelf life receipt warning (days)** – this is the minimum number of days you want to remain before the expiry date of the product when you receive it. If less time remains, a warning is displayed.

     For example, if you receive a product on the 2nd of the month with an expiry date of the 30th of the same month and the **Shelf life receipt warning (days)** is set to 30, a warning is shown as fewer than 30 days remain.

   - The **Shelf life warning (days)** is equivalent to the previous entry. It is used in the Short Shelf Life report – any product with a shelf life less than these days, and not expired, will show as Amber.

   - **Receipt lead time (days)** specifies how many *working* days (excluding Saturdays, Sundays, and Bank Holidays) can elapse and received goods are still classed as planned receipts. When this time is reached, products are removed from the planned receipts list and must be recorded as unplanned.

     This defaults to 5 days but can be changed to be from 1 day to 100 days.

   - **Default put away mode** is how you want to treat goods as received.

     › Select **Receipt only** to hold the goods in the GOODSIN location specified on the system – you will need to 'put away' the goods as a separate process. See 'Put away stock (**G**)' on page 162 for more information.

     › Select **Receipt and put away** to add the products to the stock in this store straightaway.

6   If you want to be able to record the actual locations of stock – for example, there may be a main operating theatre store, but each theatre may also have its own stock room or area – select **Location stock management**. Selecting this option enables **Location management** – see 'Managing locations for a store (**G**)' on page 70.

7   In **Requisition point**, select an existing requisition point from the list associated with this site. There may be more requisition points than are currently displayed - scroll through the list to see them all.

8   **Active** is selected by default. This site will be available for use as soon as it has been saved.

9   Select any other features of eDC Gold that you want to be able to use for this particular store from those listed on the right of the page.

10   **Save** the store definition. The display now shows the new store within the appropriate site.
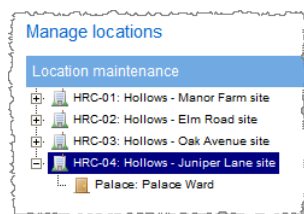
You cannot create any other elements within a store.

Managing locations for a store (G)

This feature is depreciated. It is recommended not to use this feature as it may be removed in the future. If Stores are using this feature, it is advised to remove it.

You can add multiple locations for a store, and stock levels at each location are combined to provide an overall view of stock level. As part of a stock definition, you can specify a default location for that product.

To manage locations, click **Location management** at the bottom of the **New store** or **Edit store** pages.

This option is only available if you have selected **Location stock management** as part of the store's definition.

■ To add a location, type the name of a new location and click the **Add** button (⊕) to its right.

If this store exists (has been saved), the **Full name** of the store is shown as the default for a new location.
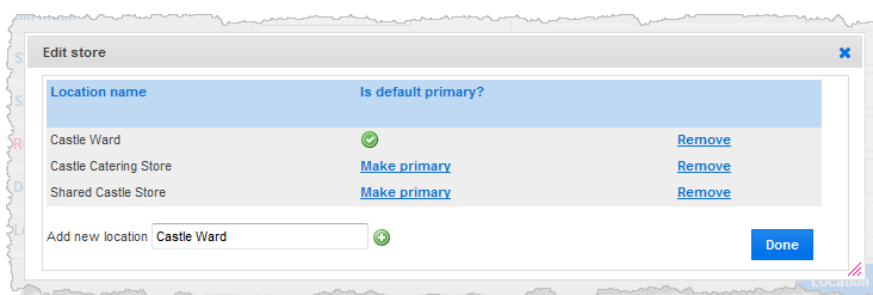
■ To set a location as the default primary location (the default on the stock definitions page), click **Make primary**.

The location that is currently set as the default primary location is indicated by the green tick (✓).

■ To remove a location, click **Remove**. You can only remove locations that:
  ▪ Are not specified as the primary location for a store (make another location primary).
  ▪ Are not currently used on any stock definition.

You cannot remove the only location associated with a store as that is the primary location. If you are no longer using locations with this store, clear the **Location stock management** option on the **Edit store** page.

When you have made all necessary changes, click **Done** to return to the **Add store** or **Edit store** page, and then **Save** your changes.

Creating a department (G)

Sometimes stock is managed by a department rather than a ward or other unit. For example, some therapists may manage their stock at department level.

You do not need to create a department to use eDC Gold. Stock can be issued to departments from stores within the same site.

Departments are created within sites.

1 Select the site within which you want to create the department.

2 Click **Add department** in the list of actions on the right. The **New department** box opens.

- The **Name** of the department should be short, so it fits on reports and the device display.
- The **Full name** of the department should clearly identify what it is.
- The **GLN** is a unique number that identifies your department's location. Your organisation's administration may give you details of this. If recorded, it must be a valid 13-digit number.
- **Active** is selected by default – this department will be available for use as soon as it has been saved.

3 **Save** the definition. The display now shows the new department within the appropriate site.
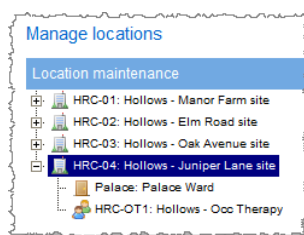
Creating a client (G)
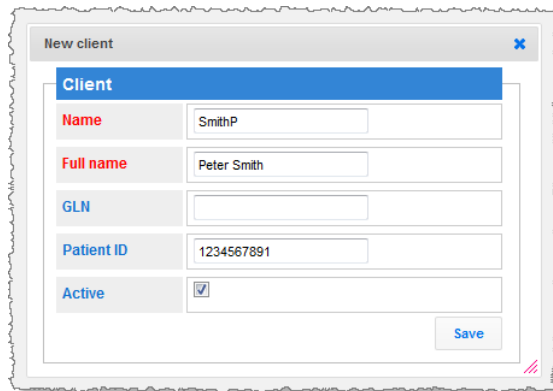
If you want to manage at the individual level, you need to create clients. These clients may be a particular healthcare professional (a Consultant Surgeon, for example).

You do not need to create a client to use eDC Gold. Stock is issued to clients (of whatever type) from a store within the same site.

Clients can be created within departments or within sites.

1 Select the site or department within which you want to create the client.

2 Click **Add client** in the list of actions on the right. The **New client** box opens.

3 Click **Save**.

Making changes (G)

Click the element you want to change to select it.

- Click **View/edit details** to make changes.

- Click **Delete** to delete it. Read the warning message and move any elements you want to keep to another place before continuing.

You must **Load Store** the eDC Android application after making any changes.

Stock definitions (G)

Stock is defined for each store.

If you have not already done so, you must select a store by returning to the list of MMDs and choosing from the list at the bottom of the page.

To return to the list of MMDs, click the MMD's name below your name on the right side of the blue menu bar.
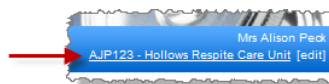
Select a **Site** and then a **Store** from the lower part of the page. The sites and stores available depend on the MMD you have selected, and only sites with stores are listed.
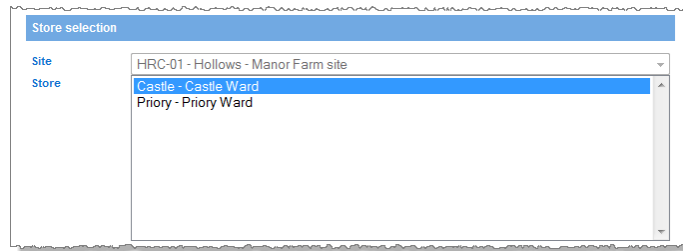
Your current selection (MMD and store, if already selected) are shown in the blue bar towards the top of every page in eDC.
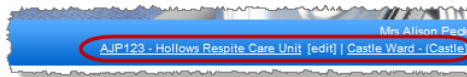
Creating a stock definition (G)
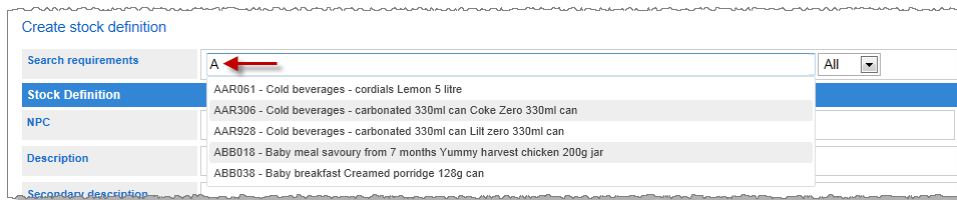
1   Select **Stock** and then **Stock definition** from the menu.

The **Stock definitions** page opens, and any existing stock definitions are displayed.

2   Click **Add stock definition**.
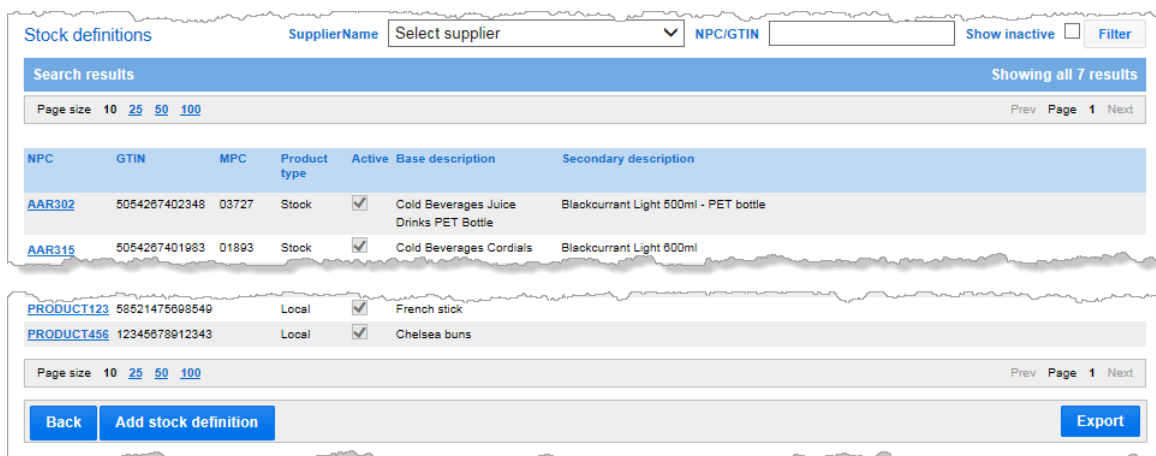
The **Create stock definition** page opens.

> The top product in the list above is annotated with an exclamation mark to show that the requirement or local catalogue record on which it was initially based no longer exists.

3   Start typing in the **Search requirements** box. If a stock definition does not exist, matching requirements for the requisition point associated with your current selected store (see bottom of the previous page).

4 Select the requirement from the list.
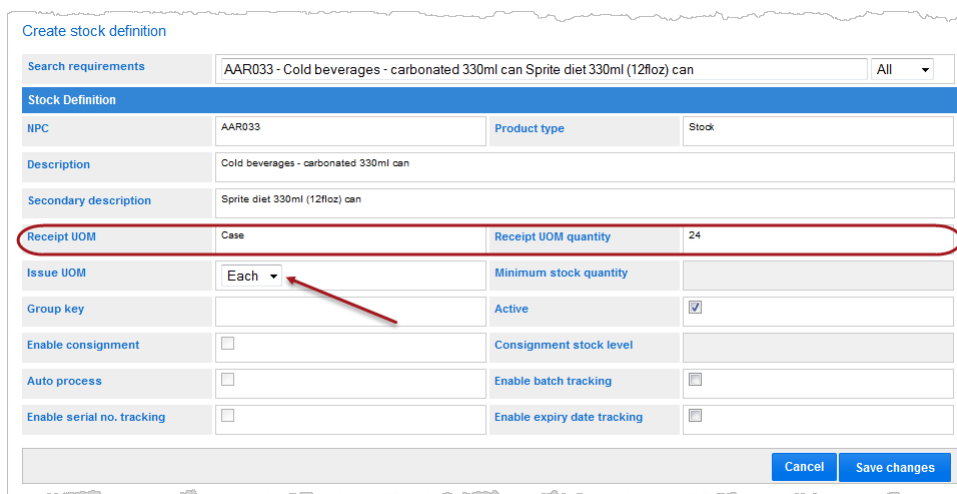
Basic information about the product is displayed, but it cannot be changed here. This is all the information at the top of the page, down to **Receipt UOM quantity** plus **Group Key**.

The **Receipt UOM** (unit of measure) and **Receipt UOM quantity** specify how the stock is received. In the example overleaf, this stock item is received in cases, each containing 24 individual items.

Use **Issue UOM** to specify how you are going to issue stock:

▪ **Each** (the default option) if issuing individual items.

▪ As it was received, which would be **Case** in the example below.

If you want to use the **Auto process** to automatically order replenishment stock when you issue products tracked by serial number, the **Receipt UOM** and **Issue UOM** must be the same, and the **Receipt UOM quantity** must be 1.

5 This stock definition is automatically marked as **Active**, making it available for immediate use. To delay this, clear the **Active** box.

6 **Enable consignment** is only available for Blue Diamond and eDirect products and products from the local catalogue. Selecting this option indicates that you hold stock of the product but that it has not yet been paid for - it is still owned by the supplier. Charges for these products are raised when they are used.

7 If you have selected **Enable consignment**, you must specify a **Consignment stock level**.

The **Consignment stock level** does not affect the re-ordering of Products. This is managed through the Reorder Level (from the Requirements) for single-pack products or minimum Stock Level for Multi-Pack products.

8 If you want an order for this product to be generated automatically as the product is used and stock levels fall, select **Auto process**.

This is only available for the following products and only when **Enable consignment** is selected:

▪ Blue Diamond and eDirect products

▪ Products from the local catalogue, as long as an external location has been associated with the requisition point – see 'Associating requisition points with the MMD' on page 25.

If an external location is not associated with the requisition point, the **Auto process** option is disabled.

If the Product is fully owned, but still needs to be **Auto Processed**, then select **Enable Consignment** and enter the **Consignment stock level** as 0.

The way this works differs depending on how products are received and issued, and the type of replenishment method you are using:

▪ If **Receipt UOM** and **Issue UOM** are **the same**, the way **Auto process** works differs depending on the replenishment method the requisition point associated with your store is using.

› For either the manual or the automatic replenishment method, orders are generated on a one-for-one basis.

For example, if you issue one case, another is ordered; if you issue 10 items, 10 are ordered and so on – even if you are already above your specified **Maximum stock level**.

› For the top up replenishment method, the **Reorder level** (set as part of the requirement – see page 48) is used to generate the order.

For example, a product's **Reorder level** is set to 20. You currently have 9 items in stock and an order in progress for 11. If you issue another 5, an order for 5 is generated to bring the total stock level back up to 20 again.

Serial and batch details are only transmitted if the quantity falls below the specified **Consignment level**.

▪ If **Receipt UOM** and **Issue UOM** are **different**, the **Minimum stock quantity** box is enabled and must be completed. When stock levels (current stock plus the quantity expected from orders already being processed) drop to or below this **Minimum stock quantity**, an order is generated to raise levels above this level.

For example, the **Minimum stock quantity** for a product (received in cases of 50) is 100. You currently have 110 in stock and issue 55, bringing your stock level down to 55.

An order is generated for a case of 50, bringing your *total* stock quantity (actual plus expected) to 105.

You issue another 30 items, taking your actual stock level (in the storeroom now) down to 25. However, with the case of 50 already on order, you only need one more case to take your total stock level over the 100 minimum. Another pack has been ordered.

9 **Enable batch tracking**, **Enable expiry date tracking** and **Enable serial no. tracking** optionally to enable you to identify and monitor products by any of these parameters.

If you select **Enable expiry date tracking**, two more boxes are displayed where you can specify the **Receipt shelf life warning (days)** and **Shelf life warning (days)**. Anything recorded in these boxes overrides the default values specified for a particular store.

The **latest unit cost** and **Latest VAT rate** are shown when you view an existing stock definition. These values are updated from information from NHS Supply Chain and cannot be changed manually when editing a stock definition.

Specifying stock locations as part of a stock definition (**G**)

This feature is depreciated. It is recommended not to use this feature as it may be removed in the future. If Stores are using this feature, it is advised to remove it.

If you have specified stock locations for the current store, the option to select where this product is stored is at the bottom of the page.

The location specified as the default primary location is already listed. To add other locations (and to change the primary location):

1 Select the location from the list of those available.

2   Click the **Add** button (⊕) to its right.

3   If appropriate, click **Make primary** to make this the primary location for this product.

Click **Remove** to remove any unused locations from this list. You cannot remove a primary location, even if it is the only one.

Exporting stock definitions (**G**)

The contents of this spreadsheet are not in the correct format for importing into eDC.

Click **Export** to export details of your stock definitions to a spreadsheet. This spreadsheet includes everything recorded about a stock definition except for the locations associated with that stock item.

Importing and exporting stock definitions (**G**)

You must have the eDC Stock Management role to import and export stock definitions.

The format of the exported spreadsheet is compatible with Excel 2003 or later versions. If the spreadsheet contains more than 64,000 rows and you are using Excel 2003, the export uses multiple sheets, each not exceeding 64,000.

To export a store's stock definitions to a spreadsheet:

1 Check that you are currently associated with the correct store. Change it if necessary.

2 Select **Admin** and then **EDC Imports** from the menu.

> The **Import** and **Export** options available depend on your role.
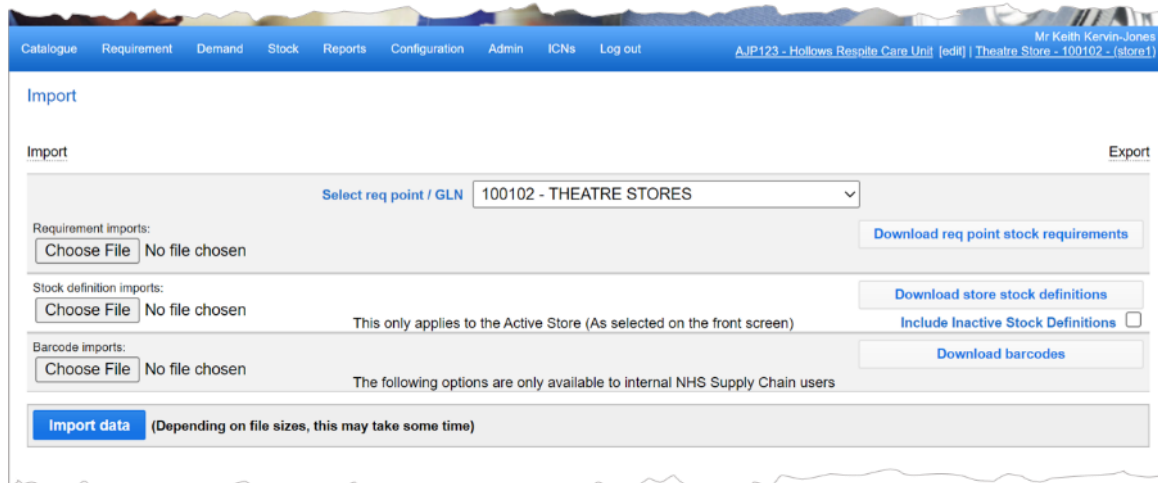
> By default, Inactive Stock Definitions are not included in the Download. Select the **Include Inactive Stock Definitions** option to include them.

3 Click **Download store stock definitions**.

4 Choose whether you want to open or save the spreadsheet.

> The stock definitions for the current store are downloaded.

	I	J	K	L	M	N	O	P
1						NHS Supply Chain		
2								
3								
4								
5								
6								
7	Enable serial no. tracking	Enable expiry date tracking	Rec shelf life (days)	Shelf life warning (days)	Issue UOM	Minimum stock quantity	Active	
8	Yes	Yes	10	20	Each	100	Yes	
9	Yes	No			Case	10	Yes	
10	No	No	0	0	Case		Yes	
11	Yes	Yes	10	10	Case		Yes	
12	No	No	0	0	Pack		Yes	
13	No	No	0	0	Box		Yes	
14	No	No			Case		Yes	
15								
16								
17								

Stock definitions 1

Making changes to stock definitions

You can add and amend stock definitions by importing a single spreadsheet. You cannot delete stock definitions.

The type of change is determined by the word in the **Action** column:

- **Add** adds the information in that row to the stock definitions for the store.

  Leave **UID** blank – the system supplies this number.

  Complete the remaining cells in the row with appropriate information using the example rows as a guide.

- **Amend** changes the definition specified in the current row.

  Make any necessary changes but do not change **UID** or **NPC**.

  - If there is no current stock of that product, any of the information in that row of the spreadsheet can be changed.
  - If there is current stock of that product, only the following can be changed:
    - › Consignment Level
    - › Receipt Shelf Life Warning
    - › Shelf Life Warning
    - › Minimum stock qty (see 'Creating a stock definition (**G**)' on page 73 for details of the validation)
    - › Auto Process (an external location must be associated with the requisition point for orders from the local catalogue to be auto-processed).

  If you attempt to make changes to other information for a product where there is current stock, that row is not imported.

> Any rows marked as **Amend** but without changes do not affect those stock definitions. However, they do take time to process so consider deleting them from the spreadsheet. You will need to Unprotect the sheet to do this.

Save the changes made to the spreadsheet.

To import the changes:

1   Check that you are currently associated with the correct store. Change it if necessary.

2   Select **Admin** and then **EDC Imports** from the menu.

> The **Import** and **Export** options available depend on your role.

3   Click **Browse** to the right of **Stock definition imports** and find the spreadsheet containing the information for importing.

4   Click **Import Data**.

5   Click **Update** to confirm that you want to import the information in the spreadsheet.
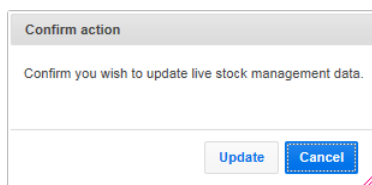
A message indicates how many rows were updated, how many were inserted and how many failed.

> If the spreadsheet contains invalid rows, the import of those rows fails.
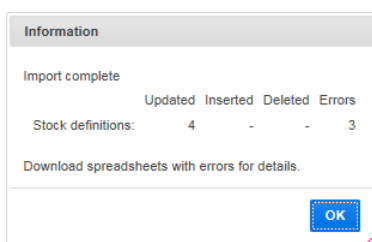
6   Click **OK** to acknowledge the message.

7   Click **Download stock definition spreadsheet with errors** and either save or open it.

Errors are listed in a column on the far right of the information.

Only lines with errors are downloaded.

8   Correct the errors, save the spreadsheet and import it.

User accounts

You must have the Trust Administrator or *User Maintenance* role to change other people's user accounts. If you do not have one of these roles, you cannot see this area.

The same user account can be used to access all of the NHS Supply Chain applications – people are granted or denied access to specific components by granting them 'roles'.

User records are created and modified in the Online Ordering application:

■ To create a user record, select **Create user** on the **Admin** menu.

■ To amend a user record, select **User maintenance** from the **Admin** menu.
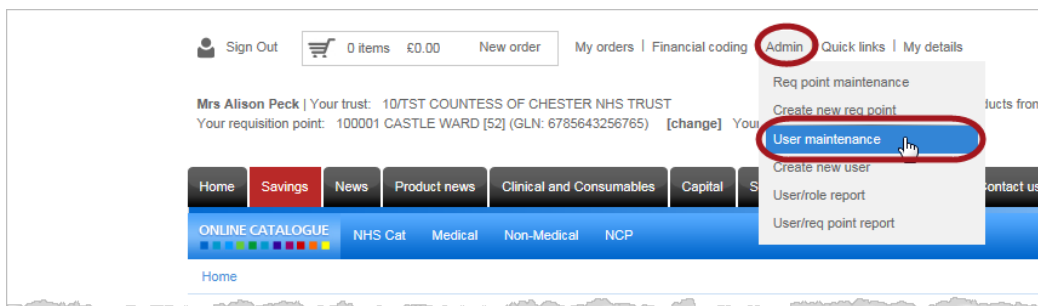
See the *Online Ordering Guidance Notes* for detailed instructions.

Roles

Roles determine what a person can do when logged on to the NHS Supply Chain applications. You can move roles between the two boxes using the arrow buttons between them – the box on the left contains unassigned roles, and the box on the right contains those assigned to this user account.
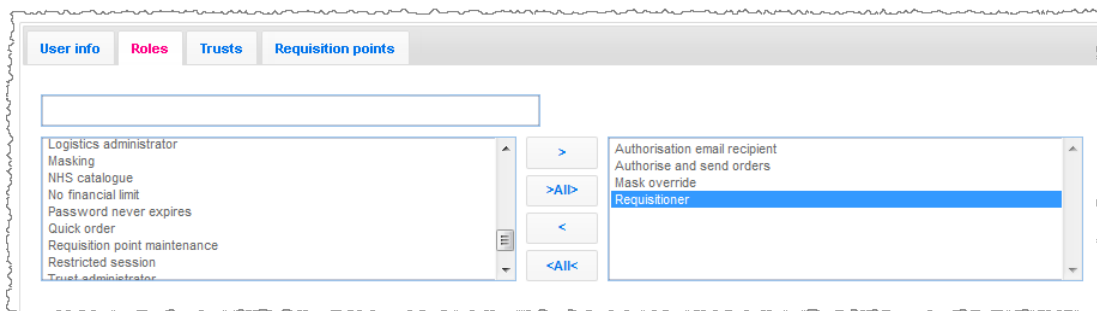
A summary of the eDC roles and what they enable people to do is given in Table 1.

Table 1: Summary of roles

People with this role…	can do this…
eDC user	Access the eDC software – any user who needs access to eDC must have this role.
Requirements authoriser	Authorise requirements and perform global edits.
eDC administrator	Make configuration changes (MMDs, requirements and so on).
eDC catalogue manager	Maintain the local catalogue.

Additional role available to organisations using eDC Gold G

If your organisation uses eDC Gold, another role is available to you.

Table 2: Additional roles are available if your organisation is using eDC Gold.

People with this role…	can do this…
eDC Stock Management	Use the advanced stock management capabilities of eDC Gold

Part 4: Logging on to and updating the device

You must log on to the eDC Android Application before using it to capture demand. It is extremely important that you log out again when you have finished.

Updating the device

If changes are made to any aspect of eDC using the web application, these changes must be replicated to the device.

Possible changes include:

- Changes to the local catalogue
- Adding, changing, or removing MMDs or requisition points
- Changes to requirements lists
- Changing your password

In addition, changes to the eDC program itself must be uploaded to the device.

Logging in to the eDC Android application

You use the same username and password to log on to the eDC application on the device and the web browser. If you change your password, you can use either the old or the new password until the next time you synchronise your device.

On an Android device

1   Navigate to the **Home** screen of the device.

2   Tap the **EDC** icon.

3   Enter your username and password. You can either:

- Tap the **Username** box and the small touch keyboard is shown. Type your **Username** and **Password** into the boxes.

- Tap the small triangle on the right of the **Username** box and select your username from the list shown. Enter your **Password** using the keyboard.
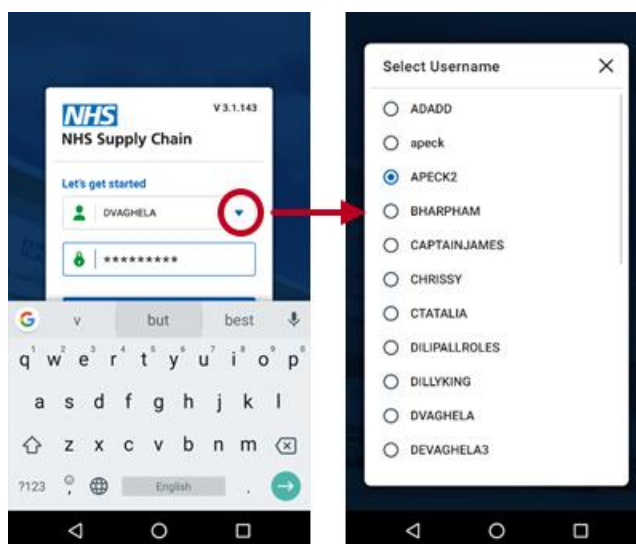
4   Tap **Login**.

If your username and password are correct, a message is shown in the lower portion of the screen (on a green background) stating that your username and password are correct.

5   Select your **MMD** from the list available.

If the MMD you need to use is not listed, you can download an updated list and associated details at any time (see 'Downloading the list of available MMDs' on page 95 and 'Downloading requirements and local catalogue for an MMD' on page 96).
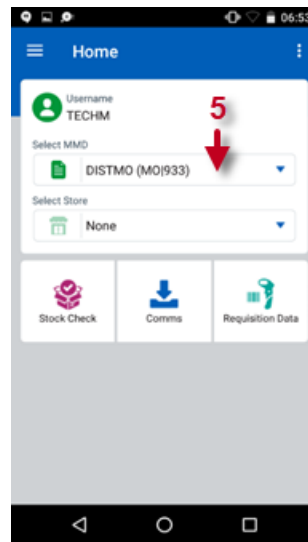
The **Store** option is only enabled if you are using eDC Gold.

Selecting a store (optional) (G)

If you are using eDC Gold, you can choose a **Store**. The list of stores associated with an MMD is shown after the MMD has been selected.
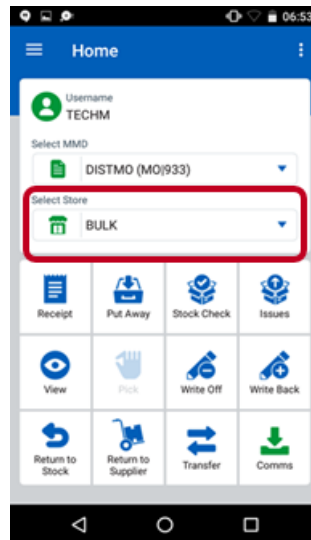
You **must** select a **Store** if you want to track stock levels and locations during this session, but you should *not* select a **Store** if you do not intend to do these things.

If you select a store, you will see the Stock Management options instead of the Demand Capture options.

You can download it if you have selected the correct MMD, but the store you want is not listed. See 'Downloading store information (G)' on page 97.

Logging out of the eDC Android application

When you have finished using the eDC Android application, you should log out.

1 Tap the navigation menu (the 'hamburger') top left corner of the screen.

2 Tap **Logout** in the menu.

A message is displayed asking you to confirm that you want to log out.

3 Click **Yes** to end the session.
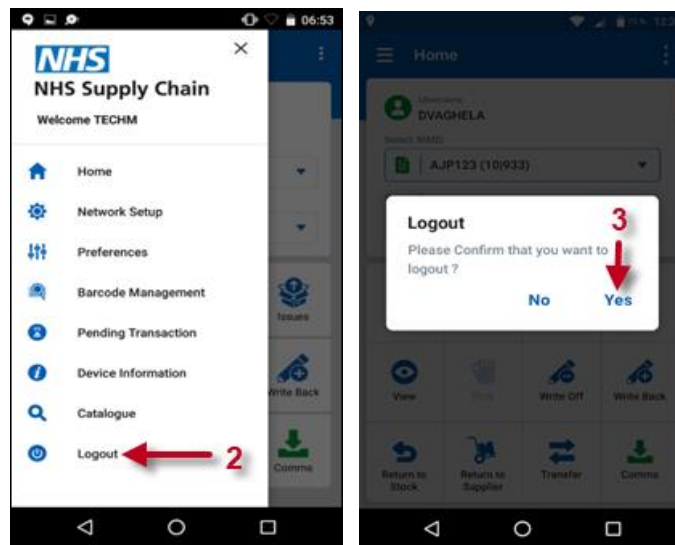
Setting your preferences

You can set a few preferences to suit the way you and your trust use eDC:

- Choose whether to display NPC, MPC or GTIN whenever a product code is shown. See 'Specifying which product code to display', below.

- You can optionally ignore characters after a space character in a barcode. This option (which means NPC codes cannot include spaces) is only used if your barcodes have suffixes you want to ignore. See 'Scanning barcodes with spaces in the product code' on page 90.

- You can temporarily filter the requisition point list. See 'Filtering the list of requisition points to those containing data' on page 91.

- You can view all product details when capturing requirements (Auto Full Screen). See 'Seeing product details when capturing requirements' on page 92.

- Automatically step through requirements when capturing orders or stock quantities. See 'Automatically moving to the next item in the requirements view' on page 93.

Specifying which product code to display

After logging into the device, you can specify how product codes are displayed. This setting applies to the device, not an individual user account, and remains set until changed.

1   Tap the 'hamburger' icon.

2   Tap **Preferences** in the menu displayed.

3   Choose which type of product code to display: **NPC**, **MPC** or **GTIN**.

> If the stock catalogue is not downloaded, the only option available is **NPC** (the other options are disabled).

Scanning barcodes with spaces in the product code

This option enables the device to read barcodes that include spaces, which is enabled by default.

To disable this option:

1   Tap **Options** on the requisition screen – if you are not already on this screen, tap **Req Data** on the main eDC screen.

2   Tap ✓ **Allow spaces in NPC**.

The option is switched off, and any characters after a space will be ignored when scanning.
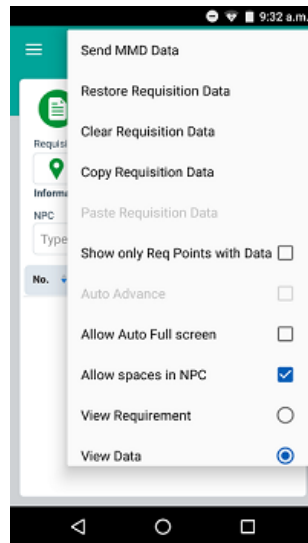
Filtering the list of requisition points to those containing data

You can filter the list of available requisition points in both the requisition and stock-checking screens only to show those containing data.

Tap **Options** at the top-right of the screen and select **Show only reqnpts with data**.
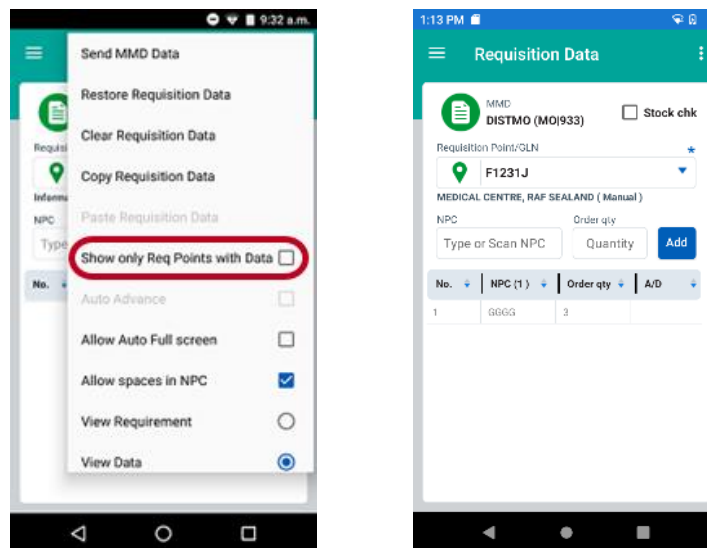
When you select the requisition point drop-down list, only requisition points with associated data will be displayed.

An asterisk (*) is displayed to the right of the list to show that the list is filtered. This option is disabled when you exit the screen.

Seeing product details when capturing requirements

If you prefer to view all product details when capturing requirements in data view, activate **Auto Full Screen** mode. From the requisition screen, tap **Options** and select **Auto Full Screen**.
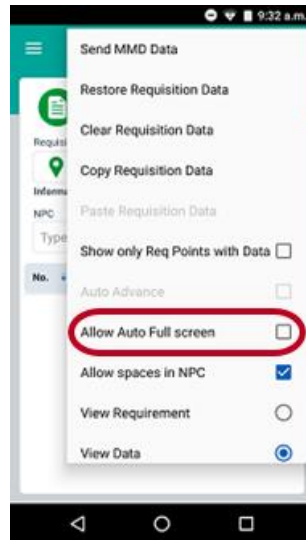
If applicable, **Stock qty and Order qty** are entered on the detailed product screen.
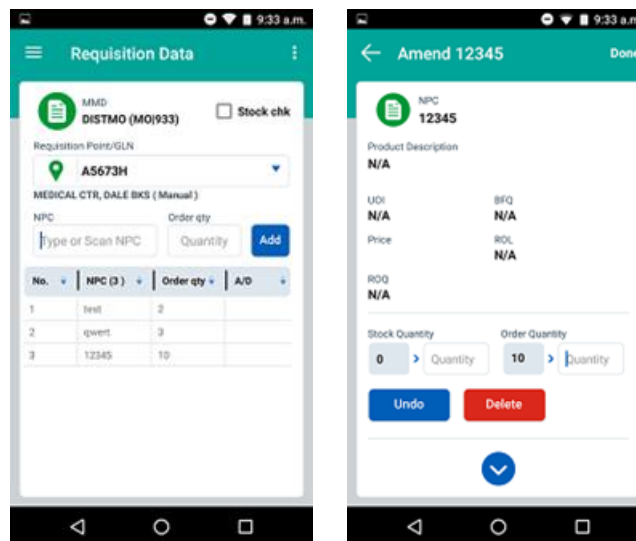
After the order or stock quantity has been entered, the screen reverts to data view until the next product code is entered.

Once this option is set, it is retained until deactivated by repeating the above steps.

Automatically moving to the next item in the requirements view

This option applies to the **Requirements** view only.

To enable **Auto Advance** mode from the requirements screen, tap **Options** and select **Auto Advance** to automatically select the next item in the requirements view.
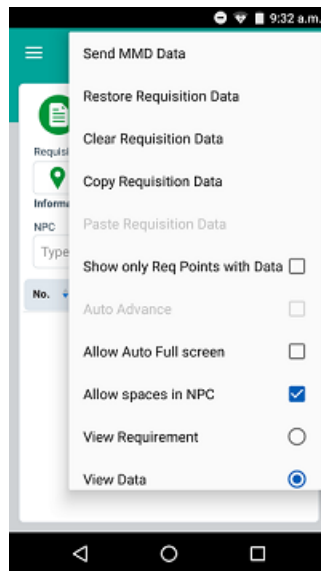
When activated, the next item in the requirements list is automatically selected once the order or stock quantity has been entered for the current item.

The sequence below shows the screen. If you start from the second option on the list, you will see it.

To skip to the next item, tap **Skip**.

To revert to the requirements view, tap **Cancel**.

Once this option is set, it is retained until deactivated, which is done by repeating the steps to activate it.
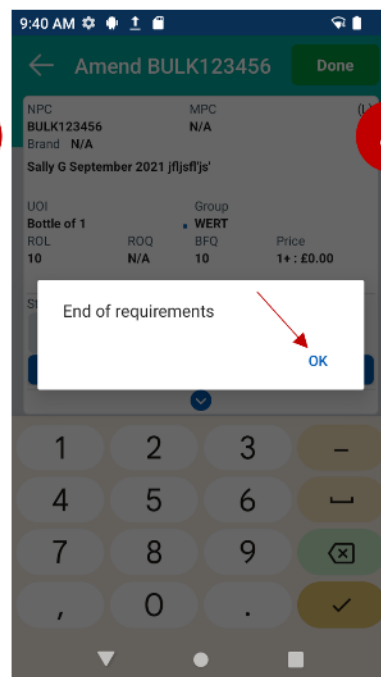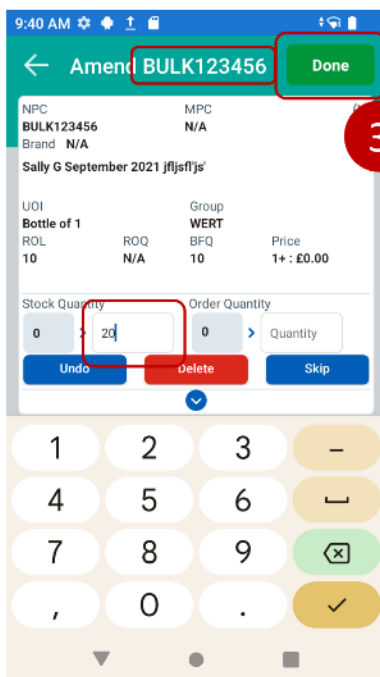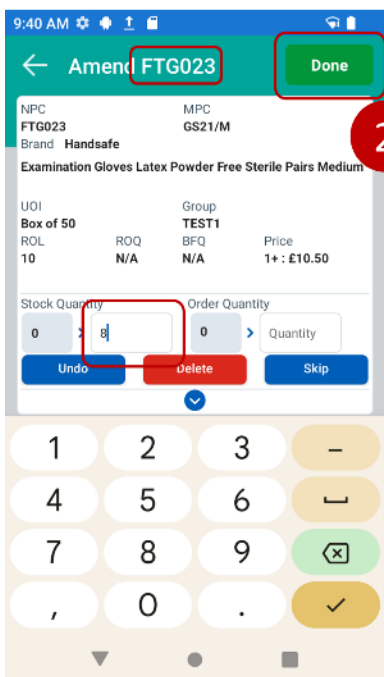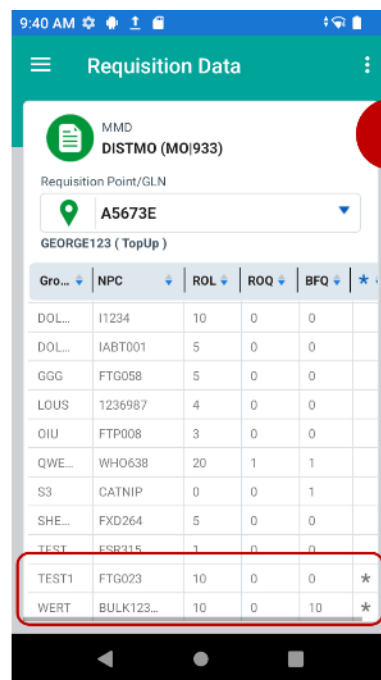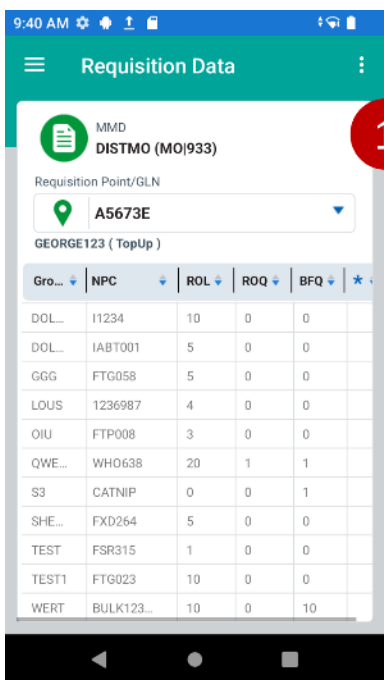
Updating MMDs

The Android device must be connected to a network for the eDC app to be able to download and update.

You need to update the MMD if you are aware that changes have been made to the MMDs that you can access, including being granted access to additional MMDs or changes to requirements.

You should update the MMD regularly – we suggest weekly – to ensure you always have current information.

Downloading the list of available MMDs

You should download a new MMD list whenever new MMDs that you want to use have been defined. Only those MMDs that you can access are downloaded.

1 Log into the device (see 'Logging in to the eDC Android application' on page 85).

2 Tap **Comms** on the bottom-right on an Android device (below) or at the centre bottom of the screen on a Windows device (overleaf).
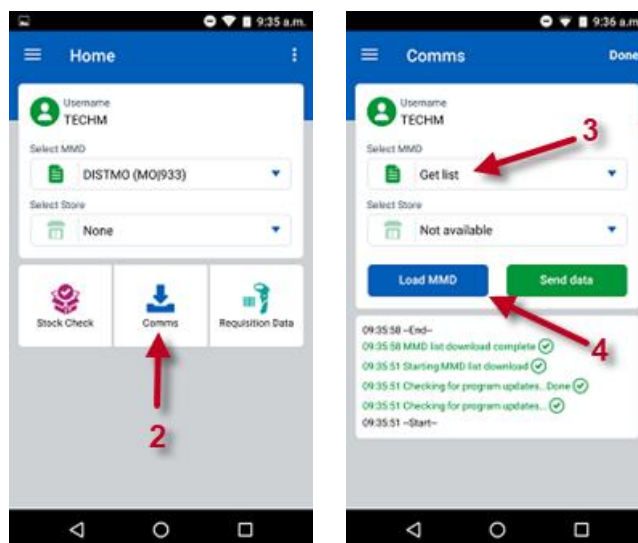
3 In **MMD**, make sure **Get List** is displayed.

4 Tap **Get MMD List**.

As the download starts, an indicator shows that something is happening. A brief message is also displayed in the lower half of the screen.

The updated list of MMDs is available in the **MMD** drop-down list.
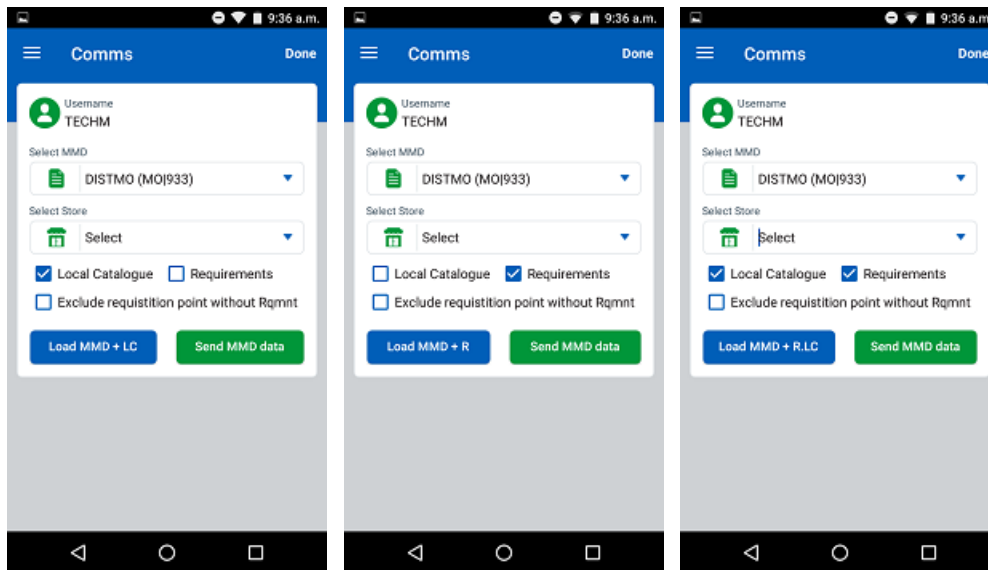
The MMDs listed are not available for use until you have downloaded the associated requirements.

Downloading requirements and local catalogue for an MMD

- You can download requirements for a single MMD or for all MMDs you have access to simultaneously.

  You can also specify that you want to exclude any requisition points with no associated requirement, which speeds up the process.

- You can optionally download a copy of your local catalogue when you update MMD details on the device.

  Your local catalogue contains products that are not ordered from NHS Supply Chain. Instead, orders are created and passed to your local purchase order system for processing. If you do not have a Local Catalogue, enabling this option is unnecessary.

To download information associated with an MMD:

1   Select the appropriate **MMD** from the drop-down list.

2   Tap **Options** and select:
- **Download Local Catalogue** to download the local catalogue for the selected MMD.
- **Download Requirements** to download all requirements for the selected MMD.
- **Exclude Req.Points without Reqm…** to prevent details of requisition points that do not have any associated requirements downloading. This may speed up the process.

3 Tap the **Load MMD +LC**, **Load MMD +R** or **Load MMD +R.LC** button (the text changes to show what will be downloaded).

A tick to the left of an option shows it is selected, and the text on the button on the left changes to indicate what will be downloaded when an MMD is selected. The options you choose are saved and are applied the next time you log in to the eDC Android application.
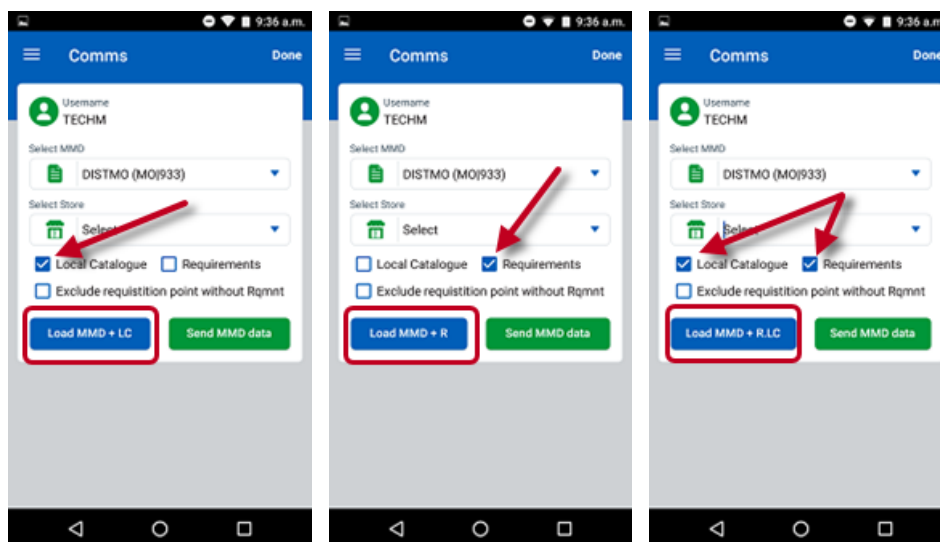
Downloading store information (G)

You can only download and use information about stores using eDC Gold. Stores are not relevant for standard eDC.

Stores are associated with MMDs. They are used to record the receipt and issue of goods and when managing stock levels. Stores must be downloaded before you can use them on the device.

MMDs and stores are downloaded separately. If you select a store, you only download details for that store and not the associated MMD.

1 Log in and tap **COMMS**.

2 Select the **MMD** for which you want to download store information.

3 The stores associated with that MMD are shown in the **Store** list. Either select a specific store or select **All Stores** from this list.

4 Tap **Load Store** (or **Load All Stores**).
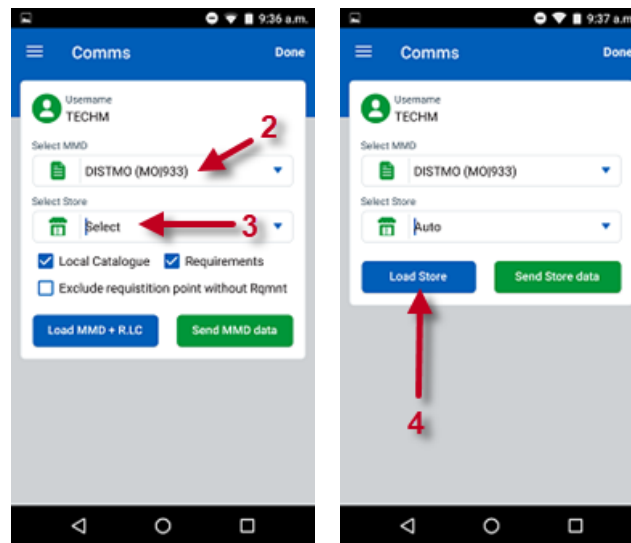
If you have any pending transactions on the device that have not yet been uploaded to the Web Application, on carrying out a Load Store, you will be prompted to confirm you want to carry this out. Loading the Store will remove any pending transactions that are ready to send, so if these transactions are needed, they will need to be sent first.

Please ensure you give enough time for the uploaded transactions to be processed by the Web Application before carrying out a Load Store (check the transaction log on the Web Application). Otherwise, the device may download out-of-date stock levels.

Downloading the NHS Supply Chain catalogue to the device

1 Follow the instructions in 'Downloading the list of available MMDs' on page 95.

2 Select **Stock Catalogue** from the bottom of the **MMD** list.

3 Tap **Load Stock Cat** to begin. The download may take a long time.
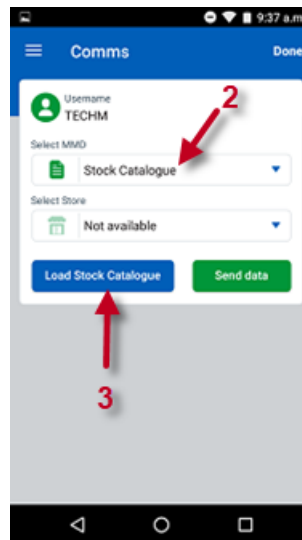
Associating barcodes with products (G)

Products are identified in the catalogue using an NPC (National Product Code). Many products are packaged with manufacturer barcodes printed on the packaging.

To effectively use the eDC Android application for managing stock and capturing demand, the relationships between the barcodes and the products they represent must be associated. These relationships can be captured using the App and uploaded to the web application when store details are uploaded.

You can associate multiple barcodes with a product. As receiving and issuing products in different units of measure is possible, you can specify that a barcode is associated with a unit of receipt, a unit of issue or both. For example, you can associate different barcodes with a case of a product you receive and with individual items you issue.

To see existing associations and to associate a barcode with a product:

1 Select the 'hamburger'.

2 Select **Barcode management** from the menu.

3 Find and tap the product code you want to associate with a barcode.

4 Check you have selected the correct product and scan the product's barcode.

You are asked to confirm that you want to associate the barcode with the selected product.
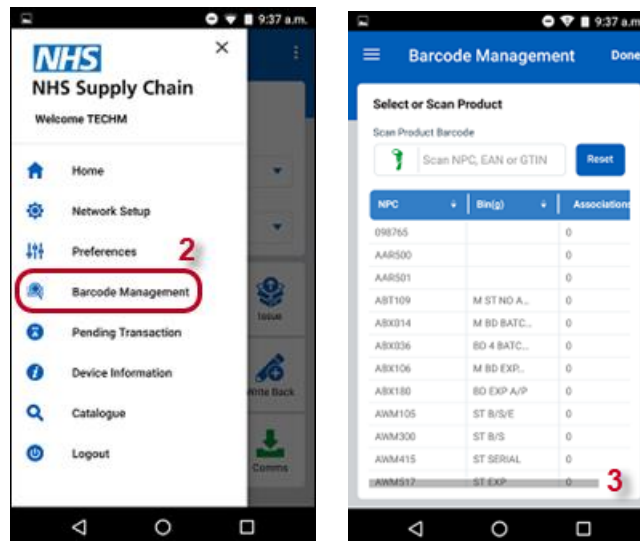
The examples below show a product that has multiple barcodes associated with it.

Barcode details are uploaded to the web application when store details are next uploaded.

The eDC Web application lists details of failed barcode updates under the **Stock** menu in the **Barcode import failures** option.
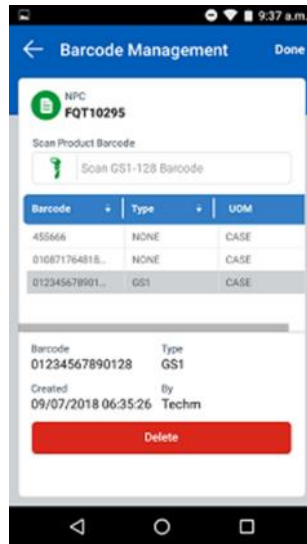
Removing barcodes from products

If barcodes have been incorrectly associated with NPCs, this association can be removed using the **Barcode management** option.

To remove barcodes from product records:

1   Tap **Function**.

2   Select **Barcode management** from the menu.

3   Find and tap the product code with the associated barcode you want to remove.

4   Select the barcode you want to delete from this product's record.

5   Tap **Delete**.

 You are asked to confirm that you want to delete the association between the barcode and the product code.

5   Tap **Yes**.

The association is deleted the next time the store's information is uploaded to the website.

Removing unwanted MMD – and store (G) – details

If you no longer require an MMD or Store on the device.

> If you are using eDC Gold and you delete an MMD, you can no longer access any of the stores associated with it although they are still on the device. To access the stores – including if you want to delete them – you must load the MMD again.

Removing MMD details

To delete an MMD:

1 Select the **MMD** that you want to delete.
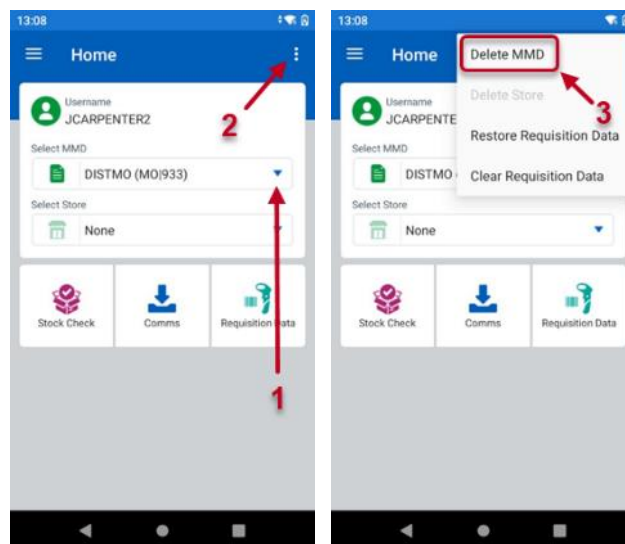
2 Tap the three dots on the top right of the screen.

3 Select **Delete MMD** from the list of options available.

4 You are asked to confirm that you want to remove this information from the device.

Removing store details (G)

Stores are associated with MMDs. They are used to record the receipt and issue of goods and when managing stock levels. You can remove unwanted store details to make space available on your device.

To remove a store:

1 Select the **MMD** and then the **Store** that you want to delete.

2 Tap the three dots on the top right of the screen.

3 Select **Delete Store** from the list of options available.

You are asked to confirm that you want to remove this information from the device. The screenshots on the top row below are from an Android device; those beneath are from a Windows device.
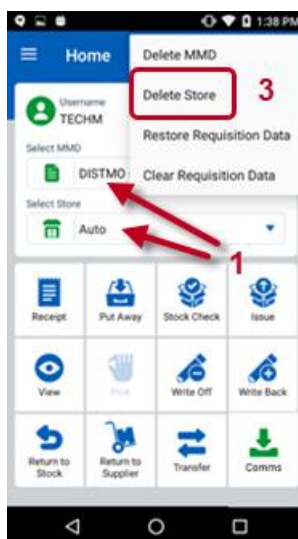
Clearing and restoring requisition data

■ You can clear requisition data to make some space on your device – cleared requisition data is compressed and archived.

■ You can restore requisition data if you previously cleared it and now need access to it.

Clearing requisition data

To clear requisition data:

1 Log on and select an **MMD**.

2 Tap the three dots on the top right of the screen.

3 Select **Clear requisition data** from the menu.

4 Tap **Yes** to confirm that you want to archive requisition data associated with the selected MMD.

5 Tap **Yes** to confirm again that you want to archive the requisition data.
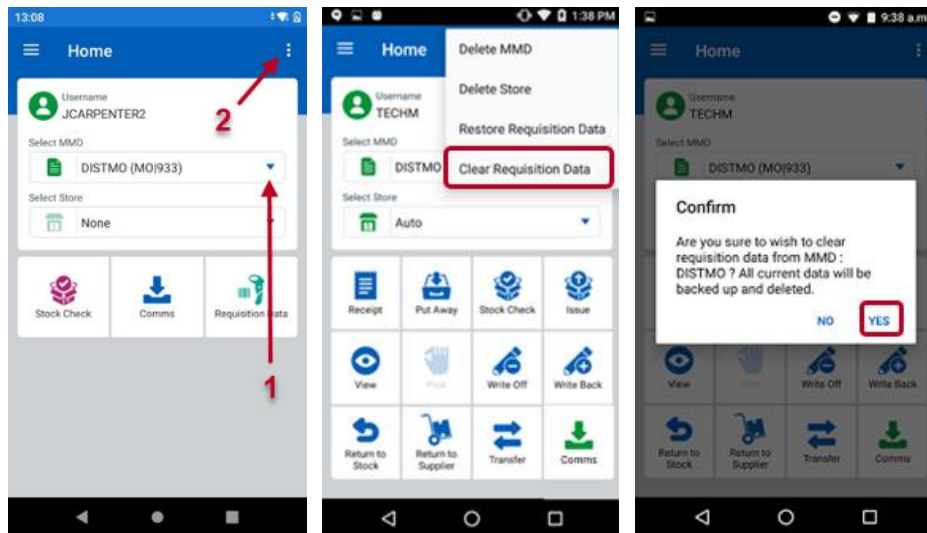
Once archived, requisition data cannot be viewed until it has been restored.

Restoring requisition data

To restore requisition data:

1   Log on and select an **MMD**.

2   Tap **Function**.

3   Select **Restore requisition data** from the menu.

4   You are asked to confirm that you want to restore the data. Tap **Yes**.

Clearing data

If you need to clear all the data from the device, or it is running very slowly and you are having trouble logging in, you can click the **Clear Data** option below the **Login** button.

You must be connected to the network to log in after you have cleared the data.
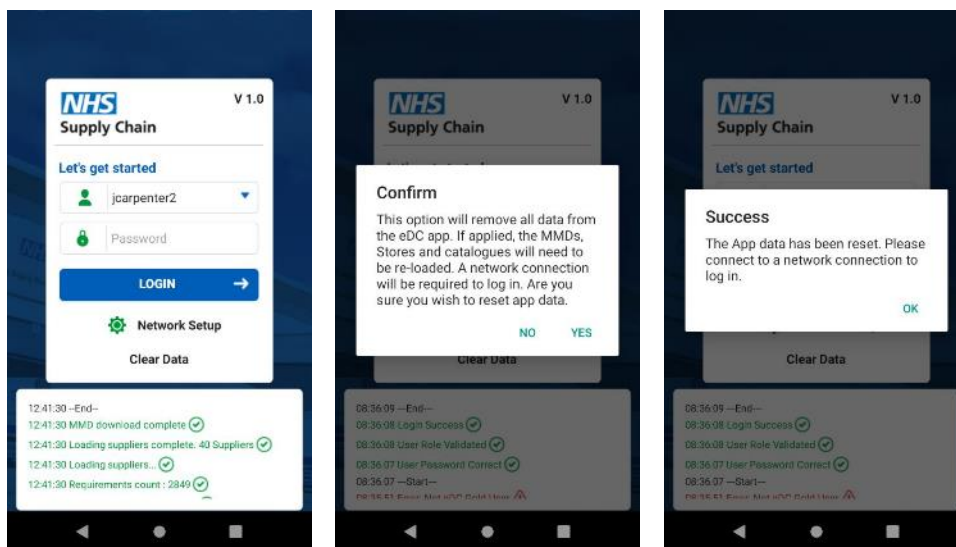
Part 5:   Using the eDC Android application to capture demand and manage stock

The eDC Android application is used to scan barcodes and capture quantities of various items in stock.

This information is uploaded to the eDC system and can be used to generate orders. Alternatively, you can choose to check your stock levels without generating an order.

Depending on how eDC has been configured, orders may be generated automatically, or some manual intervention may be required.

Capturing demand or checking stock?

When you log on to eDC on the device, you must select an **MMD** (or one is selected for you, if you are only associated with one MMD).

Using eDC Gold to manage your stock (G)

If you are using eDC Gold to manage your stock (which gives you more options than standard eDC) and want to record stock movements, you must also select an **MMD** and a **Store**.

- If you select an **MMD** but leave the **Store** as **None** (or reset it to that value), you see the **Demand Capture** options. These options enable you to carry out a **Stock Check**, go to the **Comms** area or capture requisition data (**Req Data**).

- If you select an **MMD** *and* a **Store**, you see the **Stock** options. These options enable you to manage the stock levels in that store.
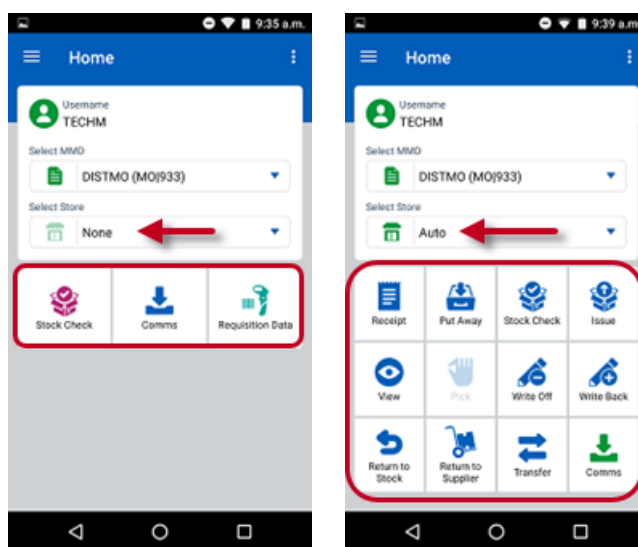
Searching and browsing the catalogue

You can search or browse the product catalogue to find products that you want to order. When you record demand for these products, a requirement is created for them.

To search or browse the catalogue, tap the 'hamburger' icon, and select **Catalogue**.
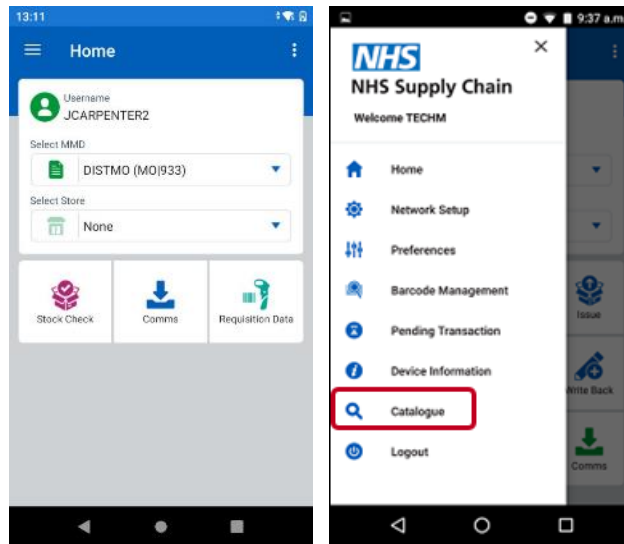
Searching the catalogue
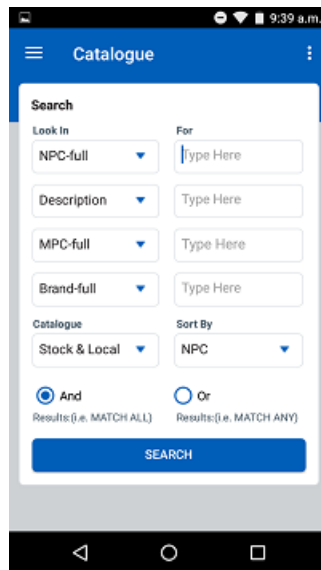
Specifying the search criteria

The boxes on the left side of the screen (under **Look In**) contain four default search options. Each box is associated with a drop-down list, and you can choose different options.

Each option has three versions: full, start and part. The version you choose determines how the characters you enter must match those of a product for it to be included in the results. The 'full' and 'start' options are much quicker than 'part', which may take a few minutes.

- **Full** – the characters you enter must match the whole of the value

- **Start** – the characters you enter must match the start of the value

- **Part** – the characters you enter must be part of the value, in that order and with no extra characters (including spaces) interrupting the sequence.

The same list is available in each of the drop-down lists. Check 'Abbreviations' on page 9 if you do not know what they represent.

Running a search

1   Select the type of information you want to search in the column under **Look In**. (See 'Specifying the search criteria' above for guidance on the options available.)

2   Type the text you want to match in the corresponding boxes on the right.

The crosses on the right of the screen, alongside the text boxes, enable you to clear the values from the boxes. The cross at the top of the column clears the text from all the boxes.

3   Select which catalogue(s) you want to search, choosing from **Stock & Local**, **Stock only** or **Local only**.

4   Select how you want the search results to be displayed (by **NPC**, by **Brand** by **MPC** or by **GTIN**).

5   Tap **Search** to begin the search process.
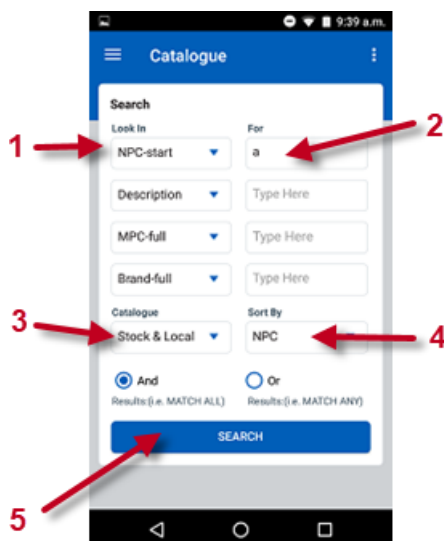
6   A list of possible matches is shown.

- An **(S)** in brackets indicates that this product is from the stock catalogue.
- An **(L)** in brackets indicates that this product is from the local catalogue.
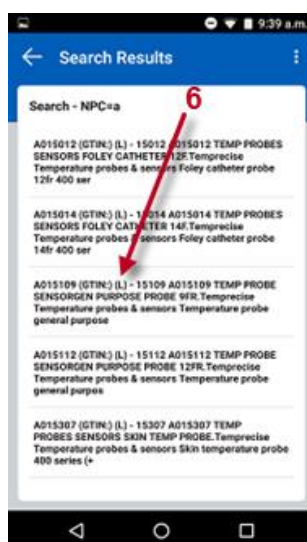
7   Tap an entry to show more detail.

If the product is a Blue Diamond or an eDirect product, icons are shown to the right of the description.
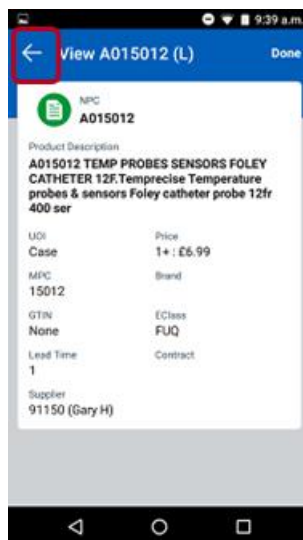
8   Tap the arrow to the left of the View.

Make a note of any products for which you want to create demand (you want to order).

Browsing the catalogue

You can browse the stock and local catalogues separately.

The **Catalogue Search** page is shown automatically when you tap the **Catalogue** option on the lower right of the screen.

1 Tap the three dots in the top right corner of the screen.

2 Tap either **Browse Local Catalogue** or **Browse Stock Catalogue** from the menu.

3 Tap a category, which expands it to show its contents. Continue tapping categories and expanding until you can see details of individual products.

4 Tap an individual product to see details of it as shown on page **Error! Bookmark not defined.**.
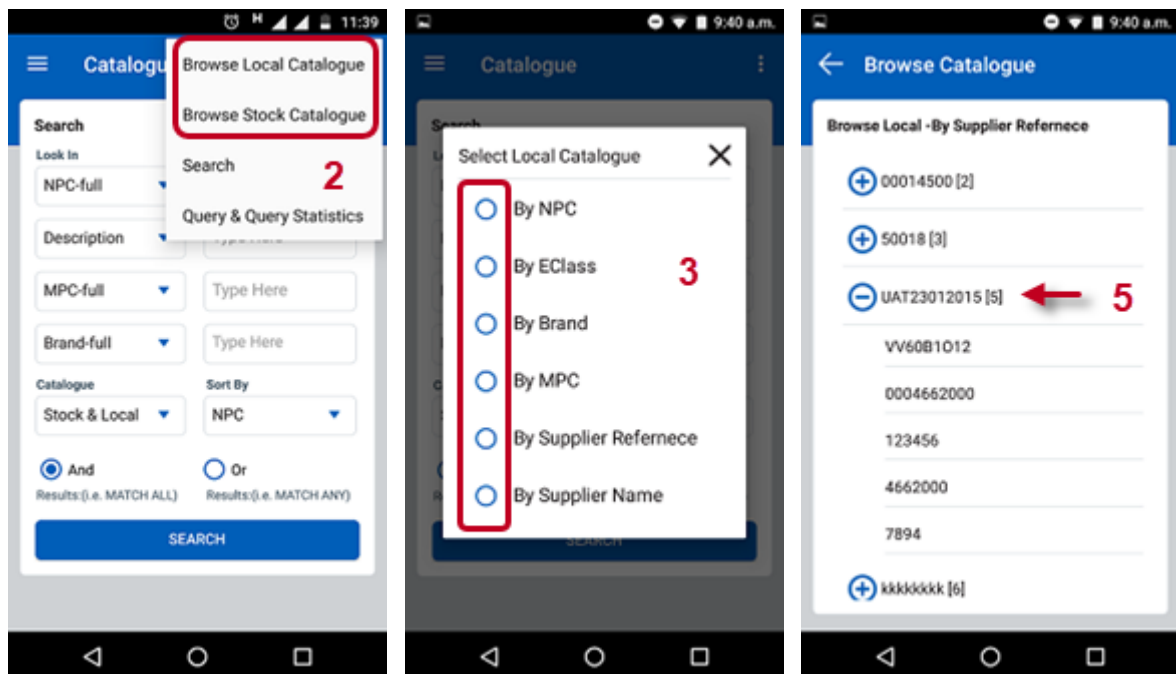
Capturing demand

If you have eDC Gold but want to use the device for capturing demand, make sure **Store** is set to **None** on the page you see immediately after logging on.

Creating a requisition from requirements

You can create a requisition from the requirements associated with a particular requisition point.

The list of requirements is only as up to date as the most recent download to the device.

To create a requisition from requirements:

1   Tap **Req Data**.

2   Either scan the **Requisition Point**'s code or select it from the drop-down list.
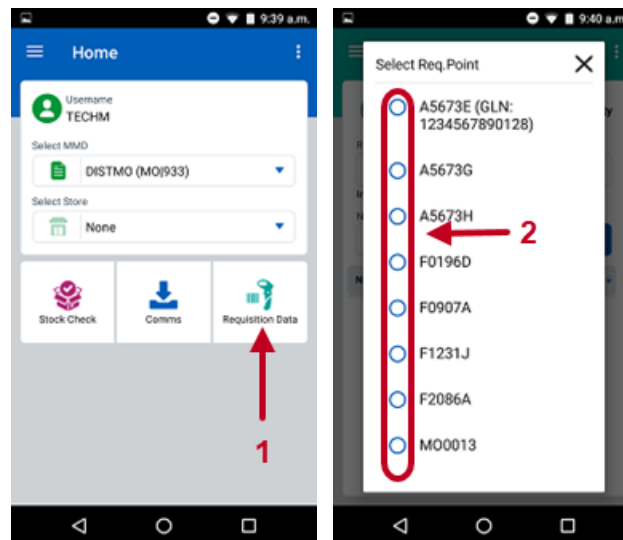
If you are using the top-up replenishment method (see 'Replenishment methods' on page 26) but you do not want to enter quantities, tap the **Enter Qty** box to clear it.

3   Tap **View** to change the display to show requirements.

4   Tap **Requirements** on the menu.

The replenishment method is shown alongside the name of the requisition point.

5   Tap a line in the list of requirements.
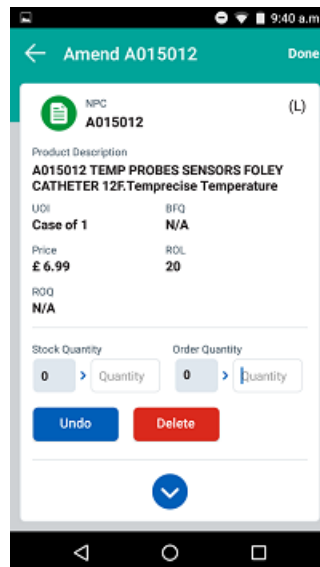
6   A page showing details of that requirement is opened.

▪   If the replenishment method for this requisition point is 'manual', the cursor is in the box to specify an order quantity and you cannot specify a stock quantity (it is irrelevant).

▪   If the replenishment method for this requisition point is 'automatic' or 'top up', the cursor is in the box to specify the current **Stock Qty** (which will enable the system to order the required quantity). You can manually specify an **Order Qty** as well if you choose.

7   Click:

▪   **OK** to save the information you have entered.

▪   **Cancel** to leave this page without saving.

▪   **Undo** to clear any changes you have made but remain on this page.

▪   **Delete** to mark this requirement for deletion when the device is uploaded. See 'Deleting a requisition line', below.

▪   **Skip** to ignore this product for now and move on to the next.

This option is only present if **Auto advance** is switched on (see 'Automatically moving to the next item in the requirements view' on page 93).

Creating a requisition without a requirement

If you create a requisition without a corresponding requirement (by typing a product code or scanning one), the effect depends on the replenishment method (see 'Replenishment methods' on page 26 for details) specified for the requisition point.

■ If the requisition point is using either automatic or top up replenishment, requisitions without requirements are deleted when the requisition is processed.

■ If the requisition point is using manual replenishment, the requirement creates an ad hoc order for authorisation.

See 'Creating an ad hoc order for demand without a requirement' on page 154 for more information.

Deleting a requisition line

You can mark a requirement for deletion when information on the device is next uploaded and processed. Until the demand is processed, it is possible to remove the mark, keeping the requirement.

You can also delete a requisition line from the information to upload – see 'Deleting a requisition line from data for upload' on page 121.

You can delete a requisition line as you move through a list of products (as described in 'Creating a requisition from requirements', above) or by selecting a product from the list associated with a requisition point. The only difference is that the **Skip** option is not available if you have selected a specific product.

The images below show a list of products associated with a requisition point. The last product in the list is selected and **Delete** is tapped. The presence of a **D** in the final column shows that this product has been flagged for deletion.
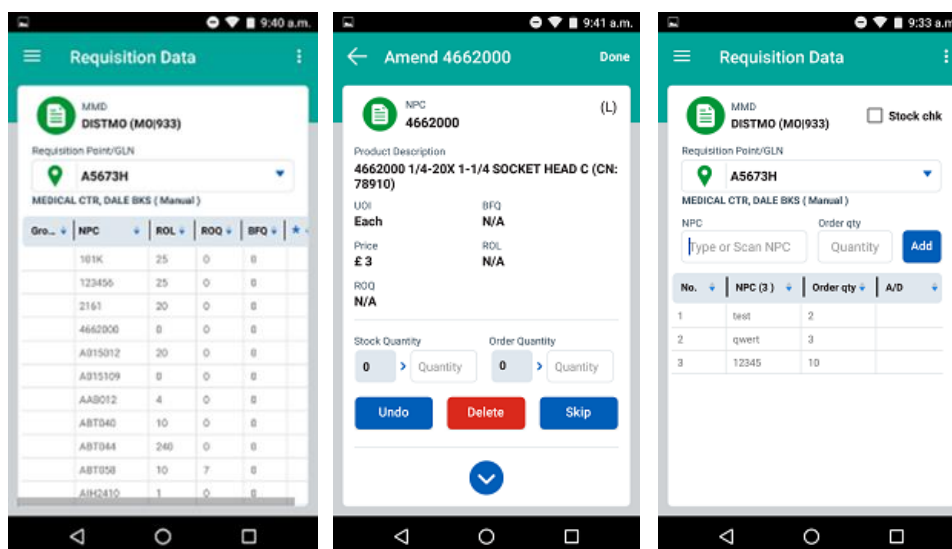
Requisition lines marked for deletion are shown in red in the web application. If the deletion needs to be reverted, you can clear the box to the left of the product code.

Carrying out a stock check

You can check your stock levels using eDC by using a dedicated set of screens so that you do not accidentally create an order by mistake. They function in much the same way as those for capturing demand but use a different colour scheme, so you are clear on which screens you are using.

Use this stock check if you are *not* using eDC Gold, which enables you to check stock at store level. The information is shown on the **Demand** screen on the website but is automatically marked for deletion.

To carry out a stock check:

1 Log in to the eDC Android application as normal.

2 Tap **Stock check** on the main screen.

3 Select the **Requisition point** from the drop-down list.
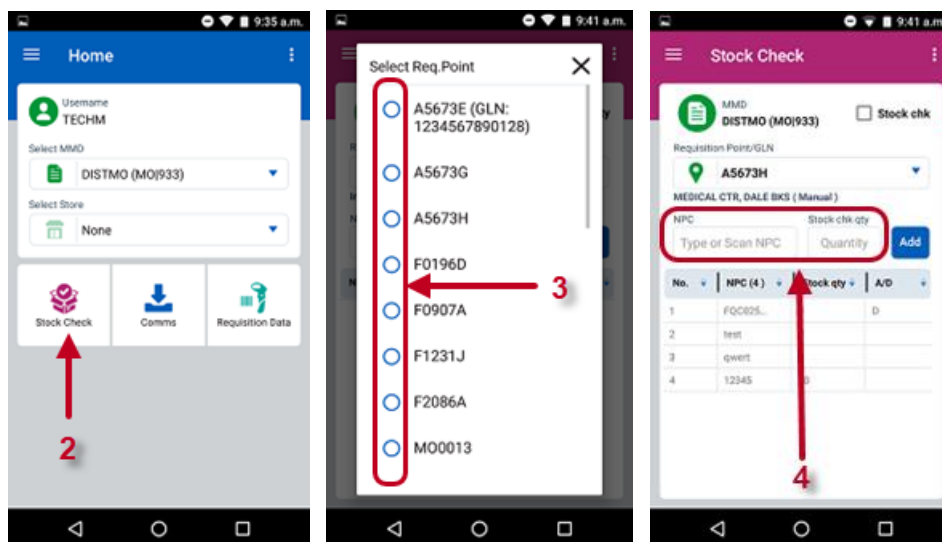
4 You can only record current stock quantities of products:

▪ You can add products to the list either manually or by scanning a barcode.

▪ You can step through the list of requirements associated with that requisition point entering stock quantities. To do this, click **View** at the bottom of the screen and select **Requirements**.

5 Upload results to the web application as described in 'Uploading information to the web application' on page 142.

Managing requisition data

You can copy requisition data from one requisition point to another if (for example) you selected the wrong requisition point when recording it. You can also delete duplicate data.

Copying requisition data

Top copy requisition data from one requisition point to another:

1 Tap **Req Data**.

2 Select the **Requisition point** that contains the data you want to copy.

3 Tap the three dots on the top right of the screen.
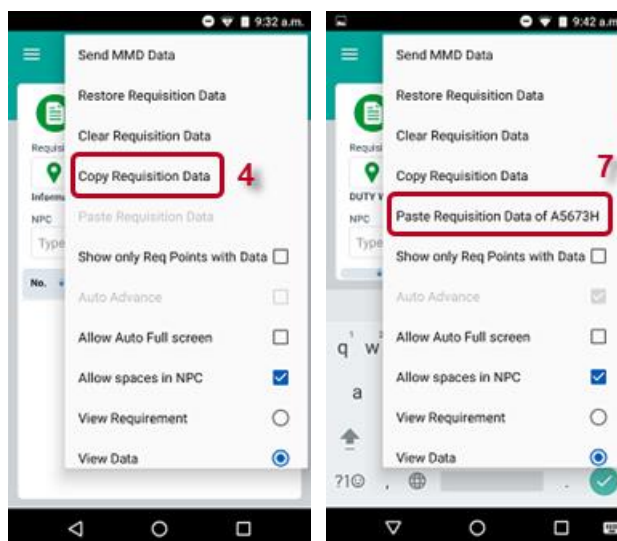
4 Select **Copy Requisition Data**.

5 Select the **Requisition Point** you want to transfer the data to (the destination requisition point).

6 Tap **Options**.

7 Select **Paste Requisition Data**. The code of the requisition point from which the data is being copied is shown.

8 Once the data has been copied, a message states that the transfer is complete. Tap **OK** to close it.

Deleting requisition data from a requisition point

After copying the requisition data to the correct requisition point, you may need to delete it from the one that should not have it.

You must paste requisition data before you delete the source. Selecting **Copy requisition data** only indicates which requisition point's data is to be copied. The copying does not actually take place until you have chosen where to paste it.

1   Select the **Requisition Point** on the Requisition Data screen that should *not* have the requisition data.

2   Tap the three dots at the top right of the screen.
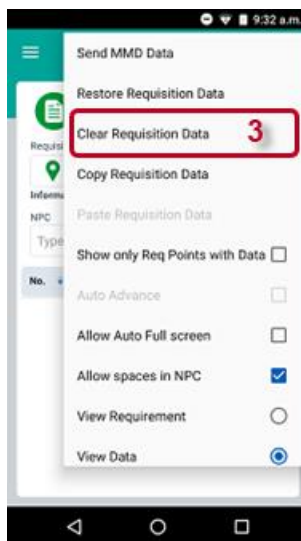
3   Select **Clear Requisition Data**.

4   If you have chosen to copy data from this requisition point, you are reminded that you cannot paste the data after it has been deleted. Click **Yes** to continue.

5   Tap **Yes** in response to the two messages displayed if you are sure you want to delete the data.
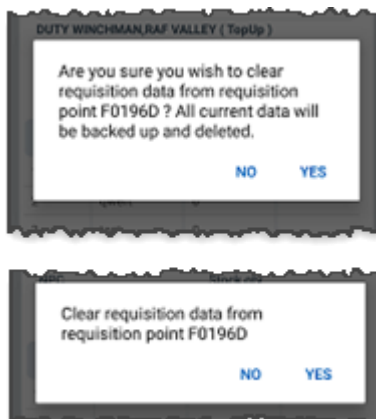
6   A message is shown when the deletion is complete. Tap **OK** to close it.

Deleting a requisition line from data for upload

If you have recorded information about a product that you now do not want to upload to the web application, you can delete it.

1   Select the line you wish to delete from the requisition data screen on the device.

2   On the **Amend** screen, tap **Delete**.

This marks the line for deletion on the web application, but it still exists on the list of items for upload. The item is marked with a **D** in the list of requisition items.
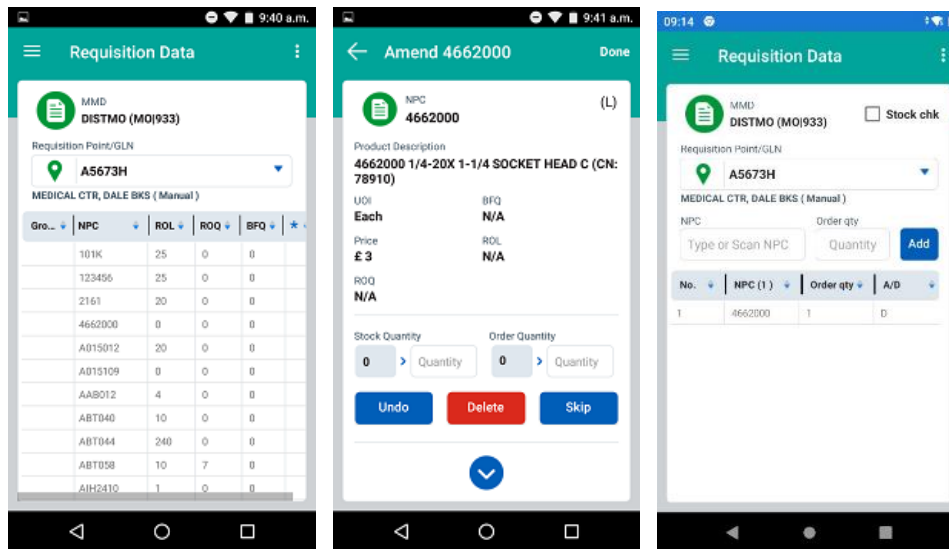
3   Tap the item to view details of it again.

The **D** in the **Order qty** box indicates that this item is already marked for deletion.

4   Tap **Delete**. You are asked to confirm that you want to permanently remove the item form the list.
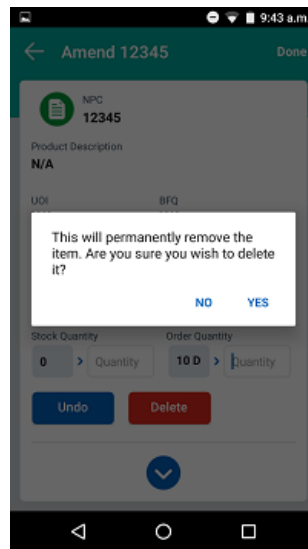
5 Tap **Yes**.

The item is no longer included on the list of items for upload.

Managing stock levels and movements on the eDC Android application (G)

Detailed stock levels and movements are only available if your organisation uses eDC Gold.

Stock movements explained

When tracking stock levels and movements, several options are used. To keep accurate records, you need a clear understanding of what each option does.

- **Receipt** – stock is received at your organisation from a supplier. If you do not 'put it away' simultaneously, its location is recorded as 'Goods Inward'.
- **Put away** – move stock from 'Goods Inward' to the store, increasing the available stock at that location.
- **Stock check** – check that what you have is what is recorded. This, in turn, corrects the stock level in the store.
- **Issue** – removes stock from the store and issue it to a department, individual user, or patient. Reduces stock level at the store. If the Stock set to Auto-Process, it will be automatically reordered upon uploading the Store depending on the stock level, outstanding orders, and replenishment method.
- **View** – see current stock levels.
- **Write off** – out-of-date or damaged stock that is being destroyed. Reduces the quantity of stock held locally.
- **Write back** – if there is a higher stock level in reality than recorded on the system, write back increases the stock quantity to match. This may occur, for example, if you miscounted during a stock check.
- **Ret stock** (return to stock) – stock that was previously issued being returned to the store. This increases stock levels in the store but does not record receipt of new stock.
- **Ret supplier** (return to supplier) – stock is returned to the supplier for refund or replacement, reducing stock levels in the store.
- **Transfer** – transfer stock between one store and another, reducing stock levels at the dispatching store and increasing them at the receiving store.
- **Comms** – go to the Comms page to upload or download store data.

Any options on a grey background are for future use.

Before you can manage your stock using the eDC Android application, you must:

1   Log in using your username and password.

2   Select the correct **MMD** from the list.

3   Select the appropriate **Store** from the list.

4   Select the appropriate option from the set in the lower part of the page.

   See 'Stock movements explained' above for an explanation of the available options.

   The image on the left overleaf is from an Android device, and the one on the right is from a Windows device.
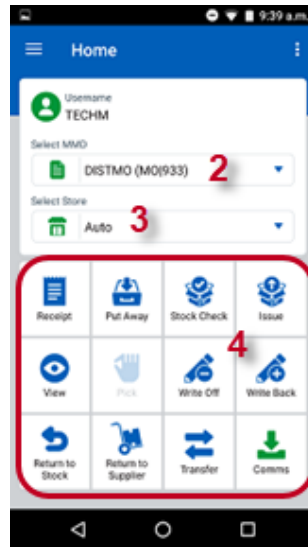
Receipting stock using the eDC Android application (G)

'Receipting' records the arrival of stock from suppliers. You can 'put away' stock at the same time, setting its current location to your current store, or leave it at 'GOODS IN'.

To record the receipt of stock from a supplier:

1 Tap **Receipt** in the list of options displayed below the store.

2 Specify whether this is planned (you have received goods you have ordered) or unplanned receipting.

Orders only remain available in planned receipting for a specified number of days, specified for a store. Beyond that time, products must be receipted as unplanned receipts. See 'Creating a store (G)' on page 68 for more details.

▪ **Unplanned** receipting is when you have received something that was not ordered.

The **Reference** contains the text `Unplanned` but can be changed. You can enter up to 20 characters. (This appears in the web transaction log under **Local Reference**.)

You can also choose to **Automatically put away** as part of this process, so you do not have to do this as a separate operation.

Receipt by exception is not available for **Unplanned** receipting.
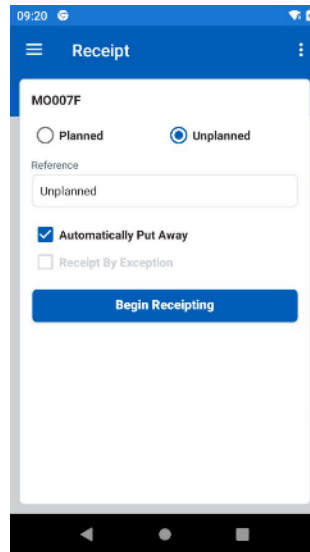
- **Planning** receipting is when you are checking goods against an order.

  If you select **Planned** Receipt, you must also select an **Order Number** from the list, which appears in the web transaction log under **Local Reference**.

  Choose whether to view:

  › **Sales Order** numbers.
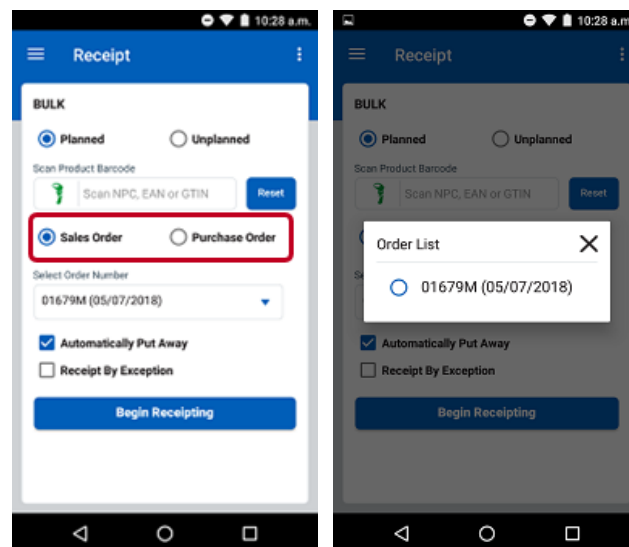
  › **Purchase Order** numbers – if a purchase order has been raised for Blue Diamond or eDirect orders, you can choose to display it. In the example on the right, the purchase order numbers have a D suffix and the original orders that triggered their creation are shown in brackets immediately following.

If you scan an NPC, EAN or GTIN barcode, the list of orders is filtered to show only orders that contain that product. To show the full list again, tap **Reset**.
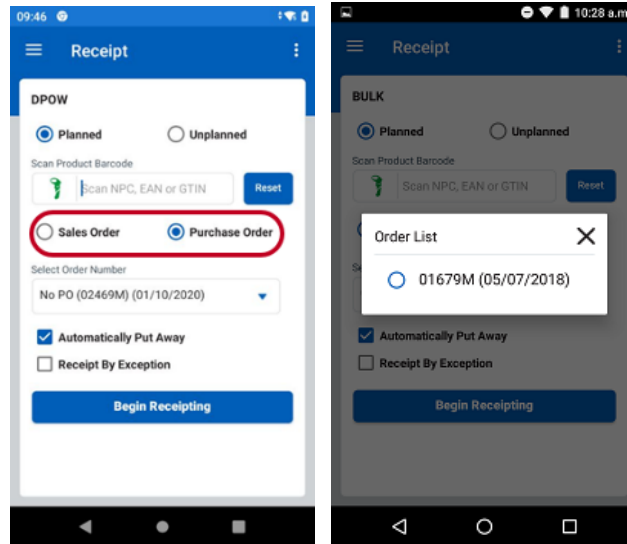
You can choose to **Automatically put away** as part of this process, so you do not have to do this as a separate operation.
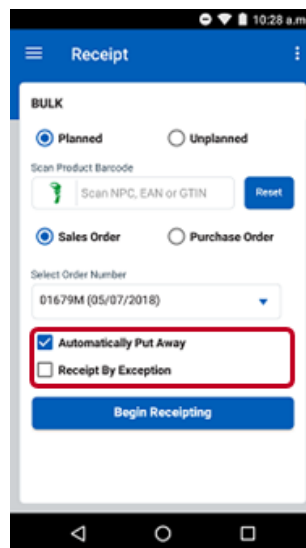
You can also choose to **Receipt by exception**, which will automatically receipt in quantities for products not requiring a tracking attribute (Serial, Batch or Expiry Date).

3   When you have made your selection, tap **Begin receipting**.

4   Select a product to record the quantity received by either:

   ▪ Scanning the barcode of the product.

   ▪ Tapping a line in the list.

> If you selected **Receipt by exception** (**Planned** receipting only), you only need to do this if the quantity received does not match the quantity expected.

5   Specify the number you have received in **Qty to Rec**.

The number in **Tot. Rec.** (total received) automatically updates.

Enable **Mark as complete** if you are not receipting the total amount expected but know that the remaining amount will not be delivered. This will remove the remaining quantity expected from the Planned Receipt.

If expiry dates, batch numbers or serial numbers are associated with the product, enter this data by either by scanning the product's barcode that includes it or recording this it as described below:

a   In **Qty to Rec**, enter the number with that expiry date or batch number. If the product is associated with a serial number, this is set to 1 and cannot be changed.

b   Set the date using the drop-down calendar, then enter or scan the batch and serial numbers (if applicable).

> If a batch number, expiry date, or serial number is required for the product, the record cannot be saved until this information is provided. If this data is missing, an audible error tone will sound.
>
> If you are receipting a Serial Numbered product that was previously been in stock but now has zero-stock, but you will be asked to confirm its receipt. As Serial Number should be unique, this extra check is in place to confirm accuracy.
>
> The system will also check other stores in the MMD to ensure the serial number being receipted is not duplicated elsewhere.

c   Click **Add**

An error will show if the specified expiry date is less than the product's expected shelf life. The product captured will need to be removed from the receipts screen to continue.

If the specified expiry date is less then the defined Receipt Shelf Life-Warning, a warning will be shown. The product can still be receipted.
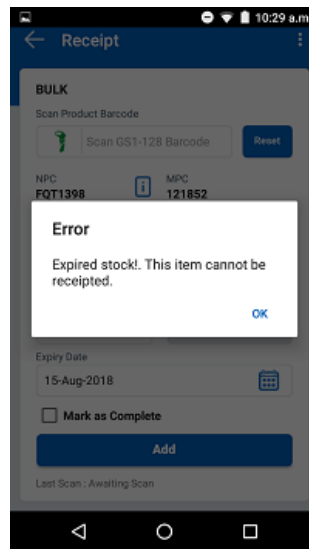
6 If you have more of the same product to receipt, continue to scan their barcodes or enter the products attributes until the product is completely receipted. Change the date, batch number or serial number and specify a new **Qty to Rec** with this different information. If the product is associated with a serial number, this is set to 1 and cannot be changed.

The number in **Tot. Rec.** updates to show the new total.
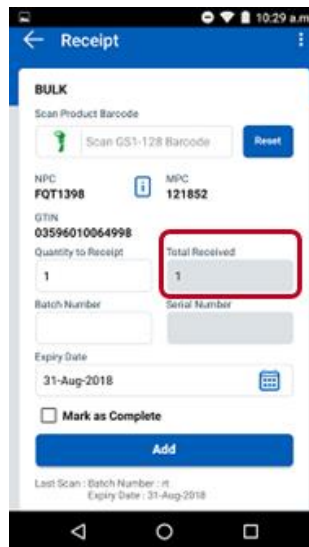
7 Tap **Add** to save and record information for other products received.

See 'Making changes to the information entered (**G**)' (following) if anything needs to be amended.

8 Select the Left Arrow in the top left to return to the product list to receipt the next product and repeat steps 5 to 7.

9   When you have completed receipting all products, tap the three dots in the top right of the screen and tap **Process Receipt**.

10 You are asked to confirm that you want to complete receipting all the products, which makes the stock available for further processing.

You can select **Process Receipt…** at any time to save the information you have entered. This reduces the likelihood of discarding work should you be interrupted.

Making changes to the information entered (**G**)

To make changes to the information entered before confirming receipt:

1   Tap the dots at the top right of the screen and select **Edit mode** to change any information you have entered.

2   Use the options below the displayed date (see above) to step backwards and forward through the individual records to check the information recorded for each.
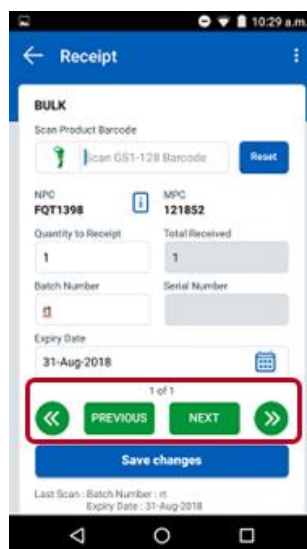
3   Make any necessary changes.

4   To delete an individual record:

    a   Tap the Three Dots in the top right of the screen.

    b   Tap **Delete selected record** from the top of the menu shown. (This option on the Actions menu is only available when you are already in **Edit mode**.)

    c   Tap **Yes** to confirm that you want to delete the selected record.

    d   The record is deleted and the quantity in **Tot. Rec.** is automatically updated.

6   Tap **Save** to save your changes.

7   Select or clear **Mark as complete** as appropriate.

8   Tap **OK** to record receipt of this product using the specified details.

Cancel Order Line (**G**)

Should it be known that an Order Line will not be delivered, or it has been receipted using Unplanned Receipt in error, it can be removed from the Planned Receipt.

1   Select the relevant Order Line from the Planned Receipt list.

2   Tap the Three Dots in the top right of the screen.

3   Select **Cancel Order Line**.

4   Confirm the Cancellation by tapping **Yes**.

5   Tap **OK**

Associating barcodes with products when recording receipt (**G**)

You can associate new barcodes with products while recording their receipts.

After selecting the product code, scan the barcode you want to associate. If the barcode is not already associated with that product, you are asked if you want to create that association.

If you do, the association (and whether it relates to receipt, issue, or both) will be uploaded to the website when the store's details are uploaded. See page 100 for details.

Clearing receipting information (**G**)

If you find that you need to clear the receipting information you have entered and start again – perhaps you were interrupted and have lost your place – you can do so.

To clear receipting information:

1   Tap **Actions**.

2   Tap **Delete receipting data**.

You are asked to confirm that you want to delete the information you entered.

3   Tap **Yes**. The information is cleared, and you can start again.

Put away stock using the device (**G**)

'Put away' adds received stock to the stock held at a particular store. You can only 'put away' stock that has already been receipted – stock that is currently at 'GOODS IN'.

To put away received stock:

1   Tap **Put away** in the list of options displayed below the store.

2   Select the product you want to put away from the list displayed.

These are listed if your product has many entries (different expiry dates, batch numbers or serial numbers). You can choose to **Put Away All** at this stage without going further or you can tap one of the list entries to put away one of the variations (and optionally record a reference).

3   Use the keypad to type the number in the box. You can use the **-1** and **+1** buttons to change the number being put away. Optionally, record a reference for this product.
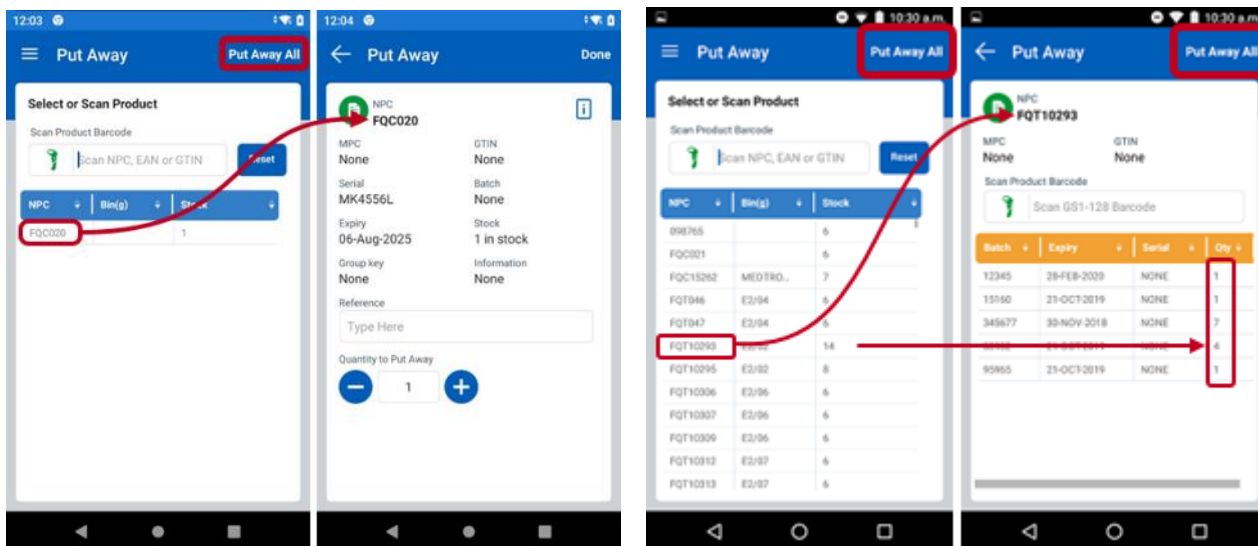
4   Tap **OK**. This returns you to a page showing how many of these products are left to put away. (You can Put away all now if you decide to do so—see the image on the right, above.)

5   Tap **OK** to return to the list of products for putting away.

**6**   Tap **OK** again to return to the stock management options screen.

Perform a store-level stock check using the device (G)

A store-level stock check enables you to verify that the quantity of stock recorded on the system matches the physical quantity in the store. Stock levels captured are then compared to the levels on the system, and write-back and write-off transactions are raised to balance the levels.

You must select a store to perform a store-level stock check. The **Stock check** option shown when no store is selected is not part of eDC Gold and is described in 'Carrying out a stock check' on page 118.

To perform a store-level stock check:

1   Tap **Stock check** in the list of options displayed below the store.

**2**   Select or scan the product you want to check stock levels from the list displayed.
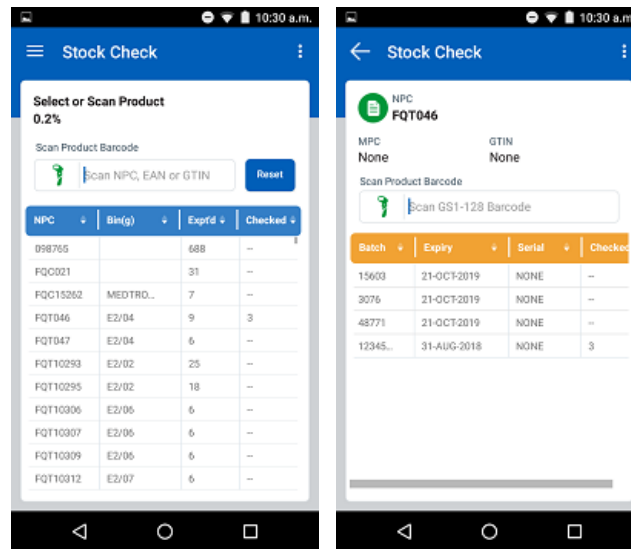
3 Select the item or group of items to check from the list, which may contain:

- Multiple entries for a product because they have different serial numbers, expiry dates or batch numbers (see example above).

- Stock levels split by those put away (all stock in any location is shown in one row) and those receipted but not put away.

4 If some stock is expected (**Expt'd**), the **Stock check** screen opens. Enter the quantity in stock in the box and tap **OK**.
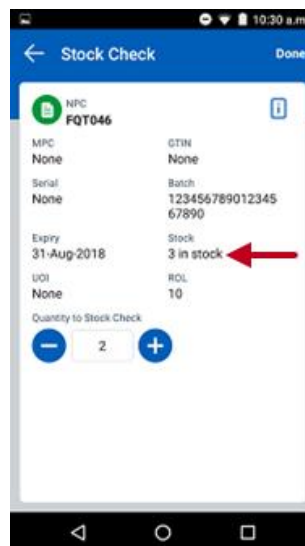

If no stock is expected (the number in **Expt'd** is 0) or if you are recording that you have stock with a serial number, batch number or expiry date, you must add stock manually.

**a** After selecting the product, tap the three dots in the top right corner of the screen.
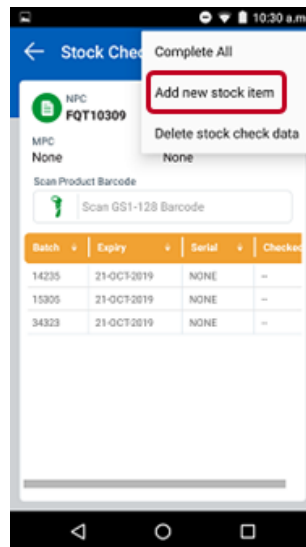
b   Tap **Add new stock item**.

c   For stock with no additional attributes, specify the number in stock.

For stock with additional attributes, the appropriate fields are available for completion, for you to record the serial number, batch number and expiry date (if applicable).
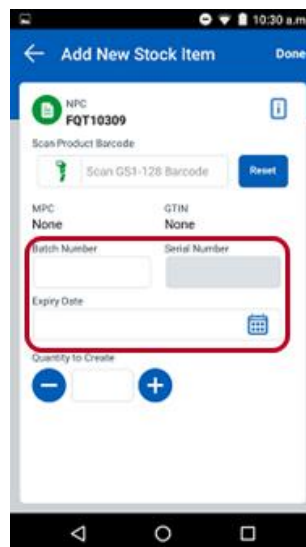
d   Tap **OK** to return to the screen showing products by location or other attribute (serial number, batch number or expiry date).

e   If there are other entries for that product, repeat this step for each.

f   Tap **OK** to return to the list of products and repeat from step 2.

5   Tap the Three Dot menu and then tap **Complete All…** when you have finished the stock check for this store.

7   Tap **OK** to acknowledge the message stating that the stock check is complete.
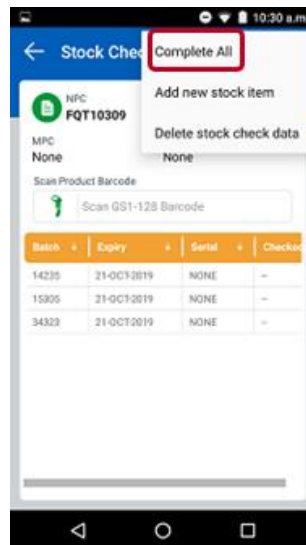
Deleting stock check data

If you have made a mistake and want to begin a stock check again:

1   Tap the Three Dot menu.

2   Tap **Delete stock check data**.

If you have added data using the **Add stock data** option, that data has not been deleted. You must enter the quantity as zero when redoing the stock check.

Uploading stock check information (G)

If you attempt to upload stock check figures without selecting **Complete** you can confirm the stock check is complete and process the information at that stage.

Issue stock using the device (G)

Issuing stock marks a quantity of a product as used. It reduces the quantity of stock held in the store. This also allows the allocation of this stock item to a Department and/or Client and to set a Local Reference number. For Products that are defined as Auto-Process, this transaction will raise orders, depending on the replenishment level, resultant stock level and outstanding orders.

To issue stock:

1   Tap **Issue** in the list of options displayed below the store.

2   Select the product you want to issue by scanning its barcode, typing its code into the search box using the keypad or selecting the product in the list.

A screen may open with multiple entries for a product if items have different serial numbers, batch numbers or expiry dates. If applicable, select the batch/serial of item to issue.

The **Issue** screen opens.
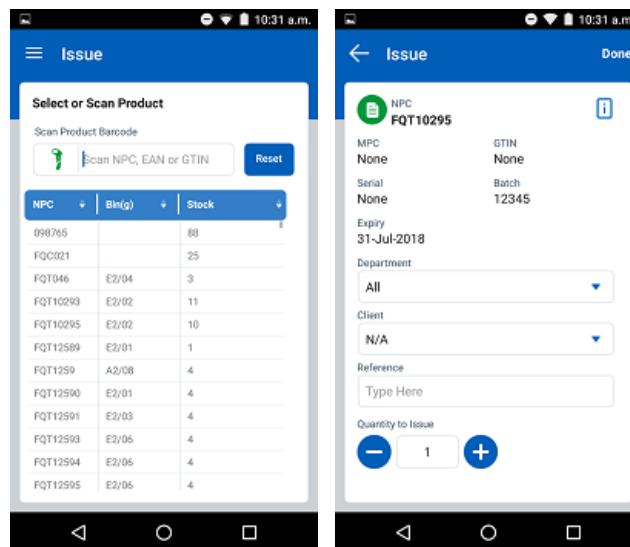
The top part of the screen is only for information. The **Site** is fixed – it contains the store you selected when logging onto the eDC Android application.

3 Optionally select a **Dept** from the list to issue stock to a department or to restrict the list of people in **Client** to those within that department.

Leave this as **All** if you want to view **Clients** in all departments and those not allocated to a department.

4 Optionally select a **Client** to issue stock to a particular client. If stock is being issued to a department, leave this as **N/A**.

5 Optionally enter a local reference for this stock issue in **Reference**.

6 Use the **-1** and **+1** buttons to indicate the **Quantity to Issue** (or type the quantity into the box).

7 Tap **Done** to issue the stock. The quantity you have issued reduces the existing stock level.

 a If you need to cancel the Issue, tap the Left Arrow in the top left to return to the product list.

8 Repeat the steps from Step 2 if there are more products to issue. The details previously set (Department, Client, and Reference) are carried over from the previous product. Change these if needed.

View stock levels using the device (G)

You can view your current stock levels of any product. To view stock levels:

1 Tap **View** in the list of options displayed below the store.

2 Select the product you want to view by scanning its barcode, typing its code into the search box using the keypad or selecting the product in the list.

   The current stock level and bin details are shown.

3 To confirm that you are viewing the correct product, tap the row to display a screen showing more details.

   ▪ In the example below, 3 items are in **Stock**. The stock was received as individual items and issued as individual items.

4 Tap the Left Arrow to return to the Product list.

Write off stock using the device (G)

You should write off stock when you need to reduce the quantity you hold but do not want to issue it or return it to the supplier. This may happen, for example, when stock has reached its expiry date, or has been damaged or lost.

To write off stock:

1 Tap **Write off** in the list of options displayed below the store.

2 Select the product you want to write off by scanning its barcode, typing its code into the search box using the keypad or selecting the product in the list.

   The current stock level and bin details are shown.

3   Select a reason for the write-off from the Reference drop-down list.

4   Use the **-1** and **+1** buttons to indicate the **Quantity to Write Off** (or type the quantity into the box).

5   Tap **Done** to confirm the write-off.

    a   If you need to cancel the write-off, tap the **Left Arrow** button.
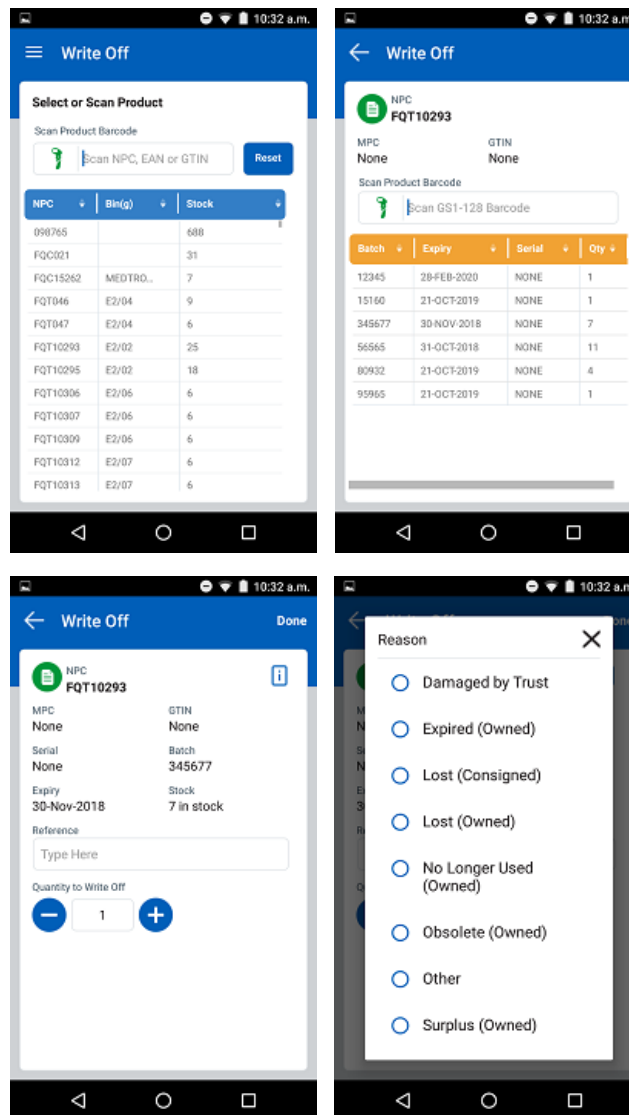
Write back stock using the device (G)

Use the 'write back' option when you need to increase the level of stock in the store but have not received any more from your supplier nor had issued stock returned. For example, you may have reduced the quantity held in stock during a stock check and subsequently found the missing items in a different location.

To write back stock:

1   Tap **Write back** in the list of options displayed below the store.

2   Select the product you want to write off by scanning its barcode, typing its code into the search box using the keypad or selecting the product in the list.
The current stock level and bin details are shown.

3   Select a reason for the write-back from the Reference drop-down list.

4   Use the **-1** and **+1** keys to specify the **Quantity to Write Back**.

5   Enter or scan for any attributes defined for the product.

6   Tap **Done** to confirm the transaction.

a   If you need to cancel the write-off, tap the **Left Arrow** button..
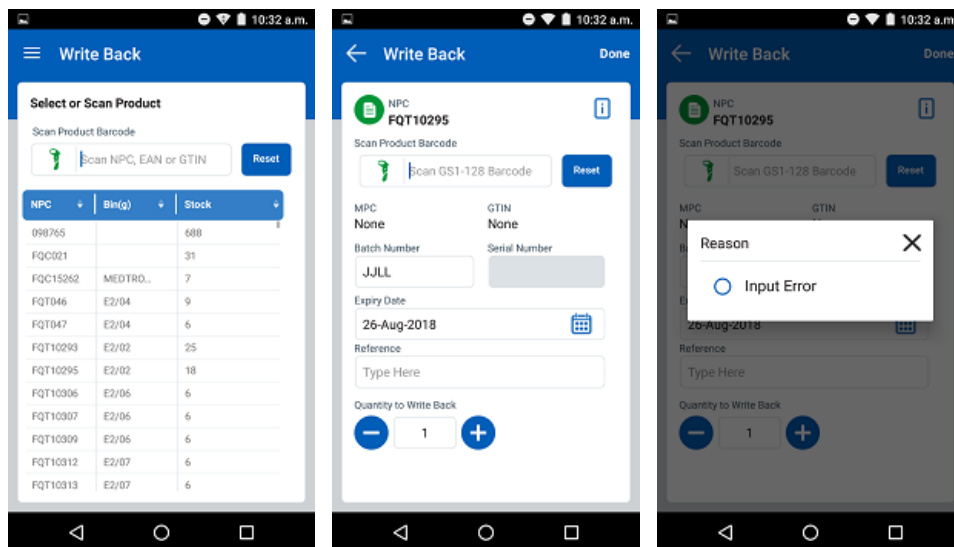
Return goods to stock using the device (G)

If you have issued stock that was returned to you unused, you can return it to stock.

To return goods to stock:

1 Tap Ret stock in the list of options displayed below the store.

2 Select the product you want to return to stock by scanning its barcode, typing its code into the search box using the keypad or selecting the product from the list.

3 The current stock level and bin details are shown. Tap the product to open a list of the people issued with this product (see image on left, below).

4 Tap the client from which you want to record the return. A screen showing the total number of this product issued to this client (or to unknown clients) is shown.
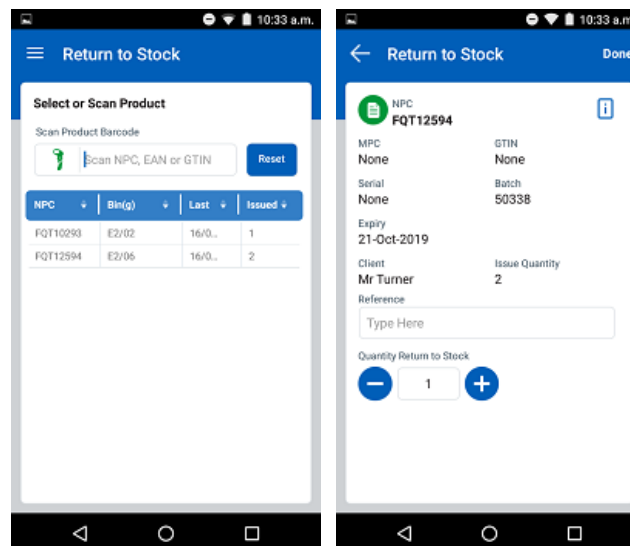
5 Optionally enter a reference for this stock return.

6 Use the -1 and +1 buttons to indicate the Quantity to Return To Stock (or type the quantity into the box).

7 Tap Done to confirm the transaction.

    a If you need to cancel the return to stock, tap the **Left Arrow** button.

![NHS Supply Chain logo]

Return goods to the supplier using the device (G)

You can return goods to the supplier, decreasing your stock levels. To return goods to the supplier:

1 Tap **Ret supplier** in the list of options displayed below the store.

2 Select the product you want to return to a supplier by scanning its barcode, typing its code into the search box using the keypad or selecting the product from the list.

3 The **Return to supplier** screen opens.
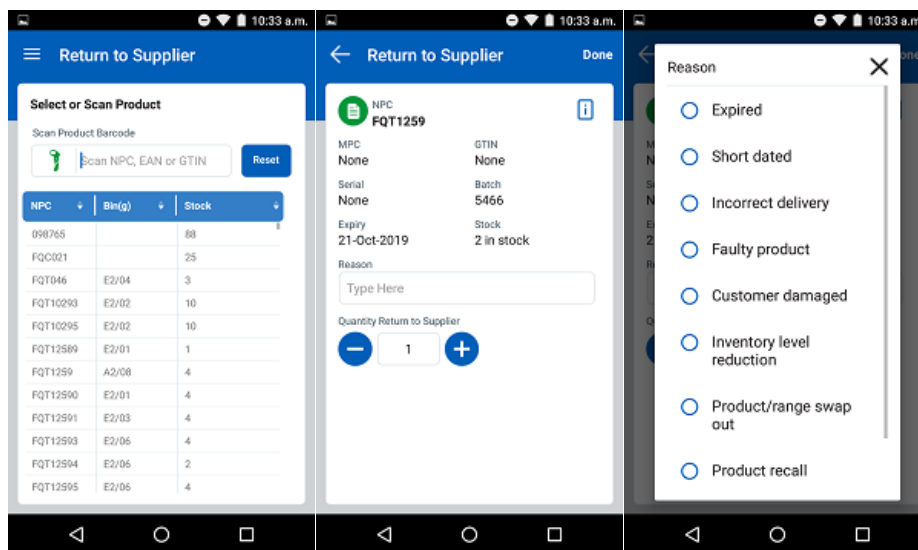
4 Select a **Reason** for the return from the drop-down list. This reason is shown as the **Local Reference** in the **Transaction Log** – see 'Monitoring transactions (stock movements) (G)' on page 169).

5 Use the **-1** and **+1** buttons to indicate the **Quantity to Return to supplier** (or type the quantity into the box).

6 Tap **Done** to confirm the transaction.

    a If you need to cancel the return to stock, tap the **Left Arrow** button.

Transfer stock using the device (G)

You can transfer stock from one store to another, keeping an accurate record of your stock's location.

To transfer stock:

1 Tap **Transfer** in the list of options displayed below the store.

2 Select the destination site and store from the lists of those available.

3 Tap **Begin transfer**.

4 Select the product you want to transfer by scanning its barcode, typing its code into the search box using the keypad or selecting the product from the list.
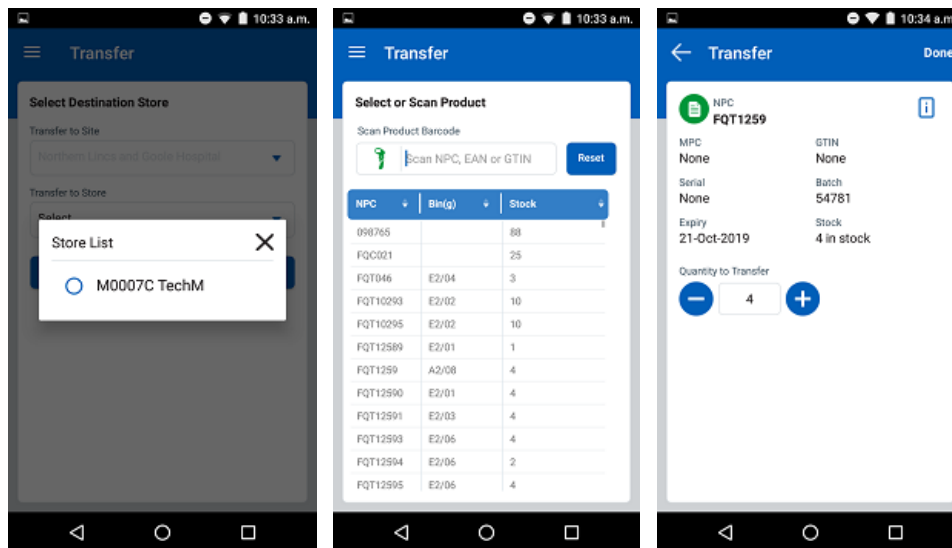
5 The **Transfer** screen opens. By default, your entire stock of this product is set to transfer.

6 Use the **-1** and **+1** buttons to indicate the **Quantity to Transfer** (or type the quantity into the box).

7 Tap **Done** to confirm the transaction. The stock quantity at your store is reduced by the number you transfer, and the stock at the destination store is increased.

    a If you need to cancel the transfer, tap the **Left Arrow** button.

Uploading information to the web application

Once you have captured demand or stock check information, upload it to the web application for processing.

There are two places (on the eDC Android application) where you can upload requirements to the main system; stock-taking information can only be uploaded from the home page.

Uploading from the home page

You can upload all information from the device using the option on the home page.

To upload the information:

1   Ensure the Device has an active network connection (WIFI or Ethernet).

2   Ensure you are logged into the correct MMD on the device.

3   On the device, tap **Comms**.
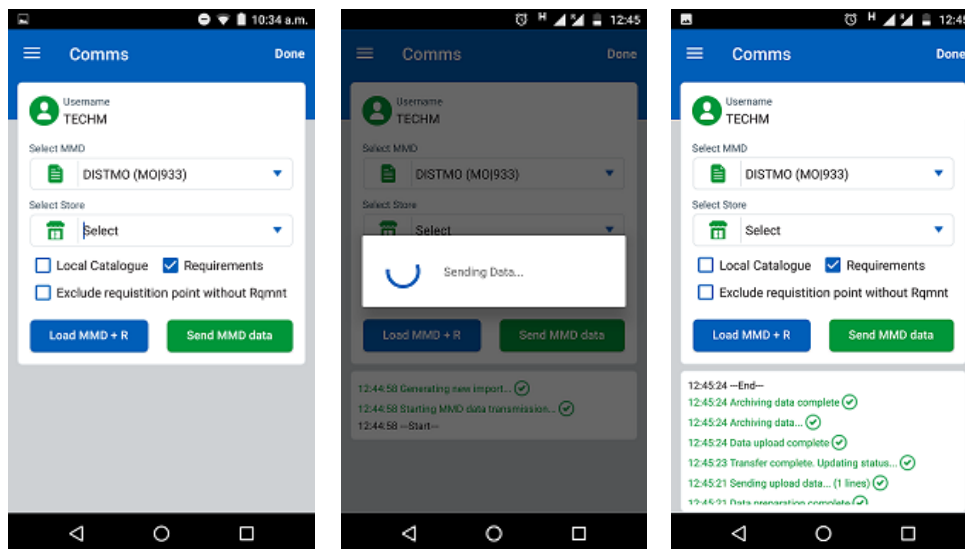
4   Tap **Send MMD Data**. Check the communications log to confirm that the data has been successfully transmitted and the process has ended.

From the requisition screen

Stock-taking information can only be uploaded from the home screen.

1   Tap on Three Dot menu at the top right of the screen.

2   Tap **Send MMD data**.

3 Tap **Yes** to confirm. You are taken to the **Comms** screen, and the data is uploaded.

A backup copy of all collected data is stored on the device. If any data loss occurs during upload, the collected data can be recovered, and the upload process can be rerun. See 'Restoring requisition data' on page 105 for instructions.

Uploading pending store transactions (G)

To transmit any pending transactions and barcode allocation changed to the Web application.

To upload the information:

1 Ensure the Device has an active network connection (WIFI or Ethernet).

2 Ensure you are logged into the correct MMD and Store on the device.

3 On the device, tap **Comms**.
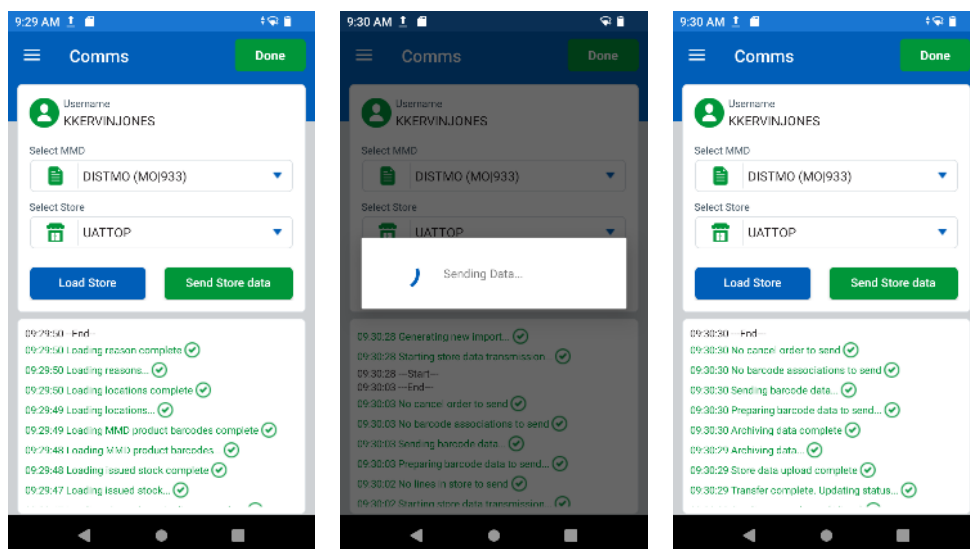
4 Tap **Send Store**. Check the communications log to confirm that the data has been successfully transmitted and the process has ended.

Part 6: Managing demand and orders using the web application

Demand is the requirement for stock. It can be specified manually or calculated automatically by comparing current and required stock levels. The stock levels you require of any product are specified as 'requirements' (see the section called 'Requirements', which starts on page 50 for instructions on creating and modifying requirements).

Demand (and stock levels) can be recorded directly into the web application or captured using the device and uploaded.

Demand forms the basis of orders: products are ordered when a demand exists. Depending on how your requisition points have been configured, orders may be created automatically when a demand exists, or you may need to convert demand to orders manually.

Demand is managed from the **Demand** option on the menu when using the web-based application.
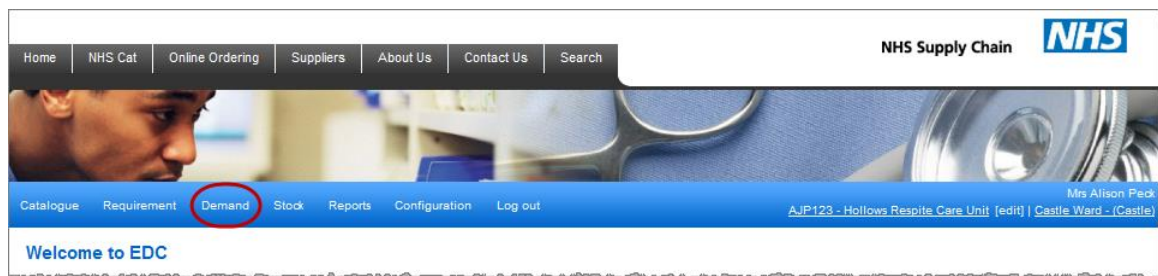
Managing demand
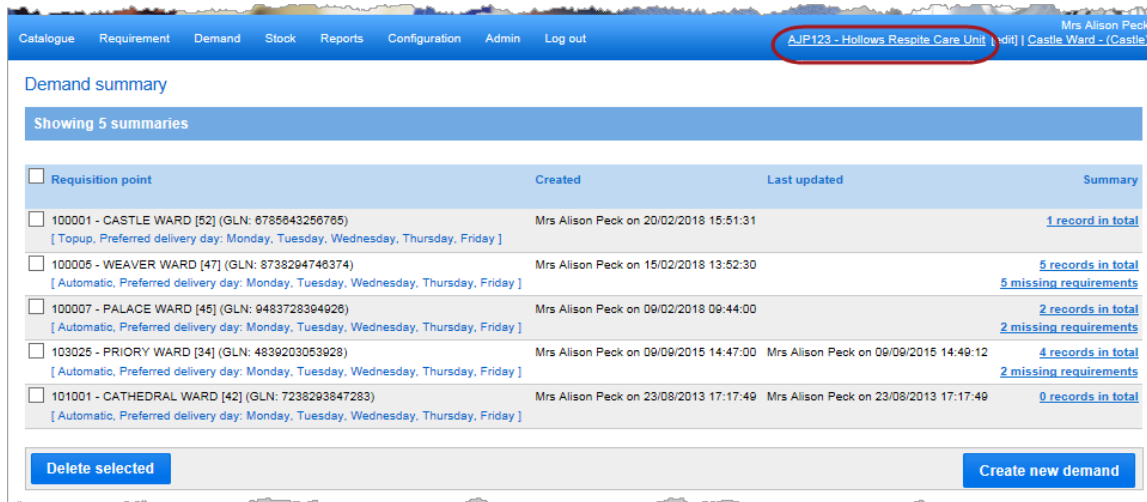
The **Demand summary** page enables you to verify data uploaded from the device and make changes if necessary. You can modify the quantities being ordered, create additional demands, or delete a demand.

When you have checked the information, you can create an order from the demand to submit to NHS Supply Chain or your local purchase system, depending on the source of the products you have identified.

Stock check information for a requisition point (not at store level – not eDC Gold) can also be viewed from the Demand summary page.

You must click **Process demand** to create an order from the demand.

Click **Demand** on the menu to open the **Demand summary** page.

Demand for all requisition points linked to the MMD you are currently associated with is shown.

Below the name of each requisition point in the list is the replenishment method used by that requisition point ('Automatic' for Priory Ward and 'Top-up' for Castle Ward) and its preferred delivery days.

Details of when the information was created and last updated are also shown.

View existing demand

The right of each row contains links to the details of the demand currently recorded for each requisition point.

- The 'in total' link opens a page showing all the demand for that requisition point, including those without a corresponding requirement.

- The 'missing requirements' link opens a page with the demand for that requisition point but *only* shows those without a corresponding requirement.

Click one of these links to open a page showing details of existing demand.

Demand can be added in one of three ways, and an icon on the left of each line shows how that line was added. By placing the mouse cursor over the icon shown when it was created, as seen in the example above.

The three methods of specifying demand are:

- Automatically, from stock levels captured using the device and other information held in the system (see 'Create demand automatically' below).

- Manually in the web application (see page 147).

- Using the device (see page 114).

To reduce the quantity displayed, you can filter the demand by type. A number in brackets after each demand type shows the number of products in that category, and this can be a good way of checking that demand records are complete before processing them.

The **VLT days** is the lead time for Blue Diamond items when those items do not comply with the standard lead times. The number of days shown is the actual number of days (not the additional number), although non-Blue Diamond items have a VLT of 0.

If a demand line is known to have an order on the system, this will show on the right hand side of the demand line. Click on the Outstanding Order link to show the order details. If the product is a non-eDC Gold (non-defined) item, then the order details will come from RESUS. If the product is an eDC Gold item, then details from Planned Receipts will show.

Create demand automatically (G)

If the Requisition Point has an active store, you can create demand automatically by clicking **Add suggested demand** at the bottom of the page. This option will only be used on Product lines that are *not* defined as Auto-Process.

The replenishment method you are using for this requisition point (see 'Replenishment methods' on page 26 for an explanation of replenishment methods) and your current stock levels are used to generate the appropriate quantities to order automatically.

You can change the **Stock quantity** and **Order quantity** if necessary.

If you click **Add suggested demand** again, all your manually adjusted quantities are returned to the calculated values based on your recorded requirements and current stock levels.

Create demand manually in the web application

You can manually create a demand on the website for any requisition point.

If the requisition point already has some associated demand, you can click the 'in total' link on the right of the row containing it and skip steps 1 to 3 below.

1   From the **Demand summary** page, click **Create New Demand** at the bottom right corner.

2   Select the appropriate **Requisition point** from the list displayed.

You can jump to the desired requisition by typing its name or code into the box above the list.
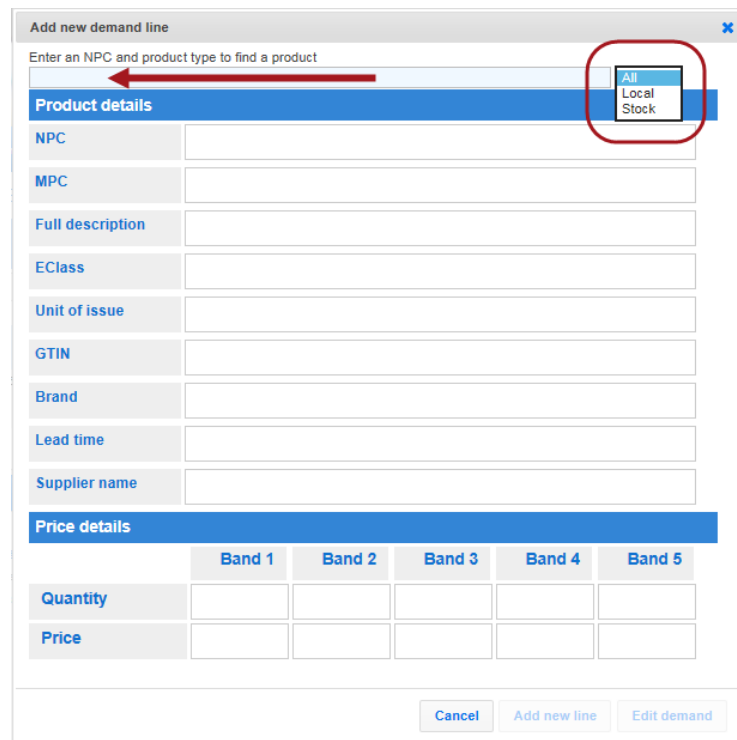
3   Click **Create demand**.

The **Demand management** page opens. If there is no existing demand for this requisition point, it will be empty.
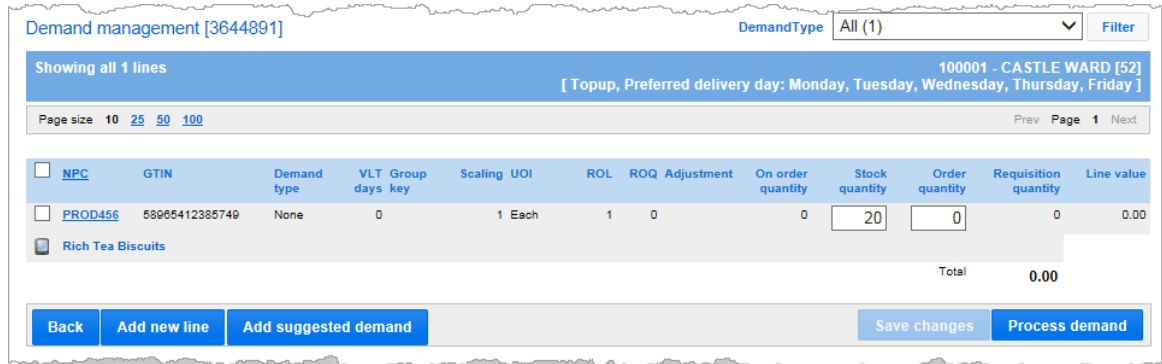
4   Click **Add new line**.

5   Start to type the NPC code in the box indicated by the arrow in the image below. If appropriate, restrict your search to **Local** or **Stock** products.
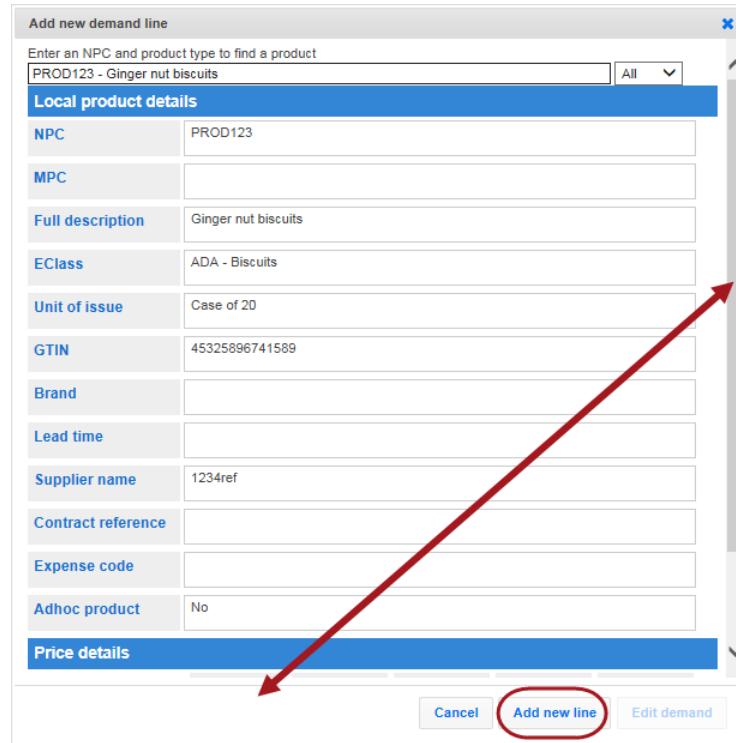

6   Select the product from the list of possible matches displayed.

Any products shown in blue text already have demand recorded for them.

If you want to change the quantities for a product with demand recorded, select it and click **Edit demand**. The **demand management** page opens and shows just that product.
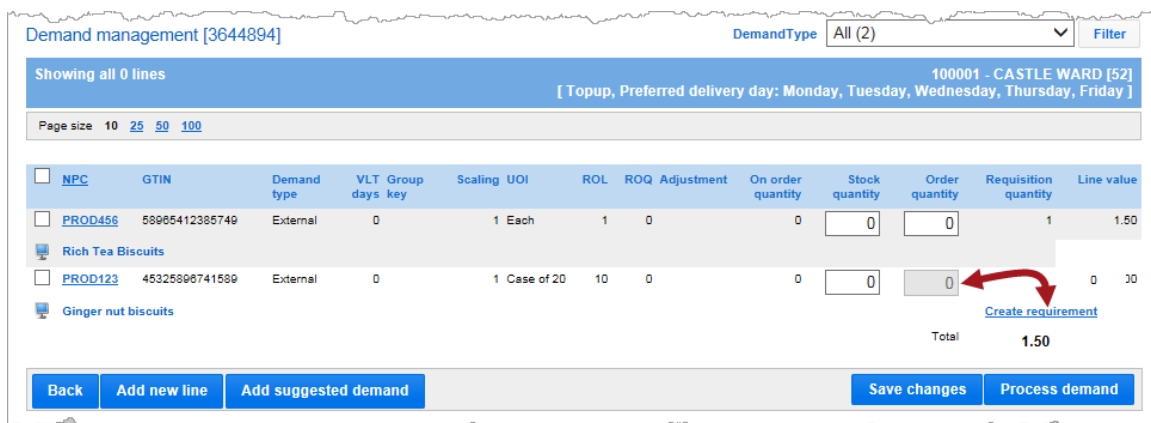
7 Check that the product you want is available. Use the scroll bar to view **Price details**, then click **Add new line**.

The product is added to the **Demand management** page.

If no requirement exists for the product you have added (see image below):

- You will not be able to edit the **Order quantity** (so if you process the demand, this product will not be ordered)

- A link to **Create requirement** is shown on the right of the row.

8 If a **Create requirement** link exists, click it to create a requirement now.

- You *must* do this if your requisition point uses automatic or top up replenishment as demand without associated requirements is deleted when the demand is processed.

- You can *optionally* do this if your requisition point uses manual replenishment – create a requirement if this is going to be a regular need from now on or ignore this option and allow the system to create an ad hoc order. See 'Creating an ad hoc order for demand without a requirement' on page 154.

If you do not want to create a requirement, go to step 10.

9 The **Requirement management** page for the product without a requirement opens.

   a Specify **Requirement** details.

   b Click **Save changes**. You are returned to the **Demand management** page.

If you click **Back to demand**, you are returned to the **Demand management** page without saving any changes.

10 Update the **Order quantity** (and **Stock quantity**, if appropriate).

11 Click **Save changes**.

Deleting demand

To remove the demand for a product so it is not included in an order generated from the current demand, select the box to the left of the product code. Demand marked for removal in this way is shown in red text and will be deleted when the demand is processed.

NPC	GTIN	Demand type	VLT days	Group key	Scaling	UOI	ROL	ROQ	Adjustment	On order quantity	Stock quantity	Order quantity	Requisition quantity	Line value
PROD456	58965412385749	External	0		1	Each	1	0		0	0	0	1	1.50
Rich Tea Biscuits														
PROD123	45325896741589	External	0		1	Case of 20	10	0		0	0	0	10	0.00
Ginger nut biscuits														

If you change your mind, click the box again to remove the tick.

Lines created after the upload of stock check data from the device are automatically marked for deletion.

Suspended lines

Items that are suspended from the catalogue are highlighted. The reason for the suspension is shown, and an indication of when the product will be available is given.

If an alternative product is available, a link to it is shown.

If you click the link to the alternative product, it replaces the original, and the **Order quantity** is adjusted to meet the alternative product's existing requirements.

If there is no existing requirement for the alternative product, a link to create one is shown.

Creating a requisition (order) from the demand

Once you have validated all the demand information and made any necessary changes, click **Process demand** to send the requisition to NHS Supply Chain or your Purchase Order system.

A page shows the number of order lines that will be processed. It also shows how many lines have been marked for deletion when the demand is processed and allows you to delete other items that cannot be processed.

If this page has been populated after uploading a stock check from the device, all items are marked for deletion.

From here you can:

■ Print a summary of your requisition – see 'Printing a summary of the demand', below.

■ Use the information stock-taking purposes, to create a stock report – see 'Stock levels from demand' on page 155.

■ Process the demand to create requisitions (orders) from it – see 'Process the requisitions' on page 153.

You can do all the above tasks but must print a copy of your requisition or create a stock take record before you process the demand.

Printing a summary of the demand

Click the link on the left of the page. A separate link is shown for each requisition type (the arrow in the example below points to the **Stock requisition** link).

The report opens as a PDF and can be saved or printed as required.

Process the requisitions

When you **Process** the requisitions, they are sent to NHS Supply Chain or your local Purchase Order system as appropriate.

You can choose not to process orders of a particular type by clicking the relevant box in the **Process** column to remove the tick.

For stock orders, the system generates an order number with an 'M' suffix (see the example below).

Deleted demand includes any demand that is manually flagged for deletion (see 'Deleting demand' on page 150). It may also include any demand that has an invalid catalogue record or a zero-order quantity.

For requisition points using the automatic or top-up replenishment methods, demand without an associated requirement or where the requirement is unauthorised cannot be processed.

If any of these conditions exist, they are shown on the **Process demand** page (the example below shows that two lines do not have associated requirements—the requisition point is using the top-up replenishment method).
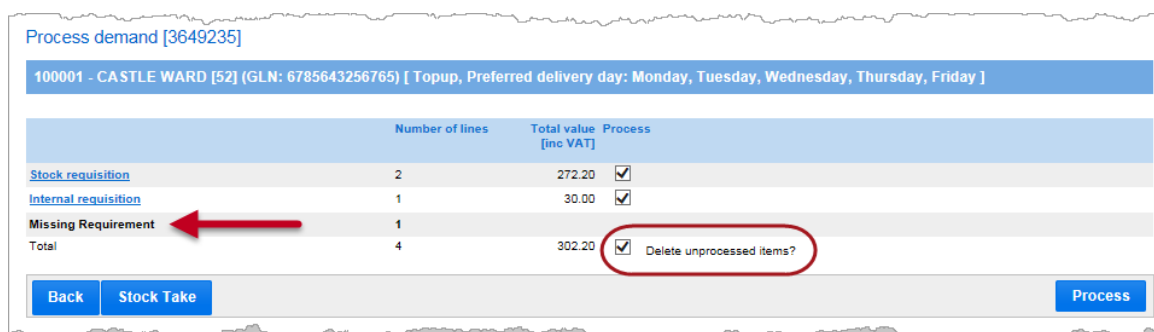
There is no box in the **Process** column to the right of that row, but to the right of the **Total** row is an option to **Delete unprocessed items**.

- If you choose to delete unprocessed items, they are deleted as the order is submitted.

- If you do not choose to delete unprocessed items, they remain on the **Demand management** page and another attempt can be made to process them later (for example, after creating a requirement).

Creating an ad hoc order for demand without a requirement

You can only create an ad hoc order for demand without a requirement if the requisition point uses the manual replenishment method.

If you have created demand without an associated requirement for a requisition point using the manual replenishment method, an option to process that demand **is** given.

If you do not choose to delete unprocessed items for a requisition point using the manual replenishment method, any products that are not authorised or do not have associated requirements are classed as ad hoc requirements.

These ad hoc requirements are saved in the **Saved order** option in the **My orders** menu of the 'Online Catalogue' application, where you can update them and complete processing.

All processed demand can be seen in the Online Catalogue application, where its progress can be followed. See the section entitled 'Tracking an order' in the *Guidance Notes for Online Catalogue* for information.

Stock levels from demand

All the information available on the **Demand management** page (see page 145) can be used in a stock take report (see 'Stock take report' on page 182).

Once you are sure the **Stock quantity** figures are correct, click **Process demand**.

On the next page in the sequence, all lines are listed in the **Deleted Demand** row, and the option to **Delete unprocessed items** is selected.

Click **Stock Take** to use the information you have captured as a record of your current stock levels.

Stock Take takes a snapshot of current stock levels – it does not affect the data.

A message at the top of the page gives the stock take reference number, and the figures are shown in the **Stock Take** report.

Click **Process** to delete the information on the **Demand Summary** page automatically.

You can use this stock check information to create an order by clicking **Back** and amending the previous page, clearing the boxes that indicate rows should be deleted. See 'Creating a requisition (order) from the demand' on page 151 for more information.

Managing stock levels and movements (G)

eDC Gold enables you to record stock levels and movements at a granular level.

When you receive a delivery, you record that stock has arrived at your organisation. You can choose to do this as a single stage (receive and put away the stock) or in two stages (receive it to indicate it has been delivered and put it away to assign it to a particular store).

Stock management (G)

You can use dedicated eDC functions to manage your organisation's stock movements. All of the available options are listed in the **Stock** menu in the **Stock management** group.
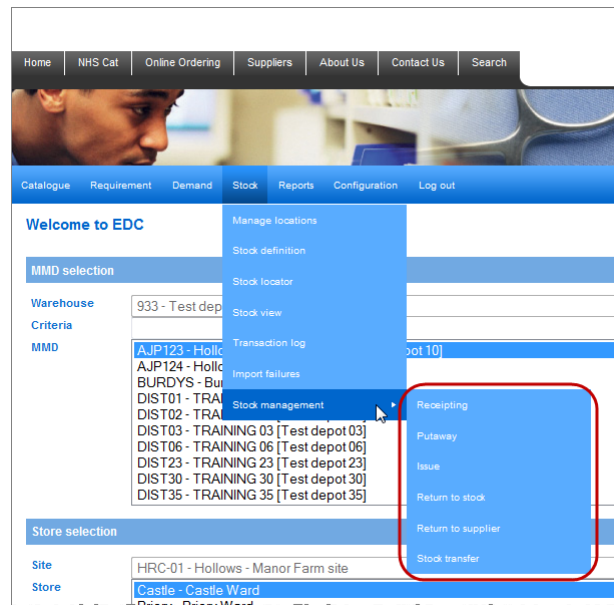
- **Receipting** enables you to record that goods have been delivered to the organisation – if you do not choose to 'put them away' at this time, they are classed as being located at Goods Inward. (See page 158.)

- **Put away** records of the location of the goods when put into their stock locations – you can combine this function with 'receipting'. (See page 162.)

- **Issue** notes when goods are used (no longer in stock). They can be issued to a named department or an individual. (See page 162.)

- **Return to stock** enables you to return previously issued products to stock (see page 163), from where you can re-issue them, transfer them or send them back to the supplier.

- **Return to supplier** also reduces current stock levels by returning to the supplier instead of by issuing stock. (See page 164.)

■ **Stock transfer** enables you to move stock between locations. (See page 164.)

Receipting stock (G)

When you record the receipt of a product, you increase your stock levels of that product. Receipting can be planned (you are expecting a known quantity of stock) or unplanned.

Expected incoming stock is shown in the **Planned** list for the time specified for that store (see 'Creating a store (G)' on page 68). After that time, the stock must be receipted as **Unplanned**.

The instructions for planned and unplanned receipting are very similar – the differences are important when you do not receive the quantity you were expecting. See 'Planned receipting (G)' on page 160 for details.

1 Type all or part of the product code or product description into the box at the top of the page. You can only record the receipt of products if your requisition point has a stock definition for that product.

For planned receipts, you can also filter the list by sales order number or purchase order number; see 'Planned receipting (G)' on page 160 for more information.

2 Click **Search**.
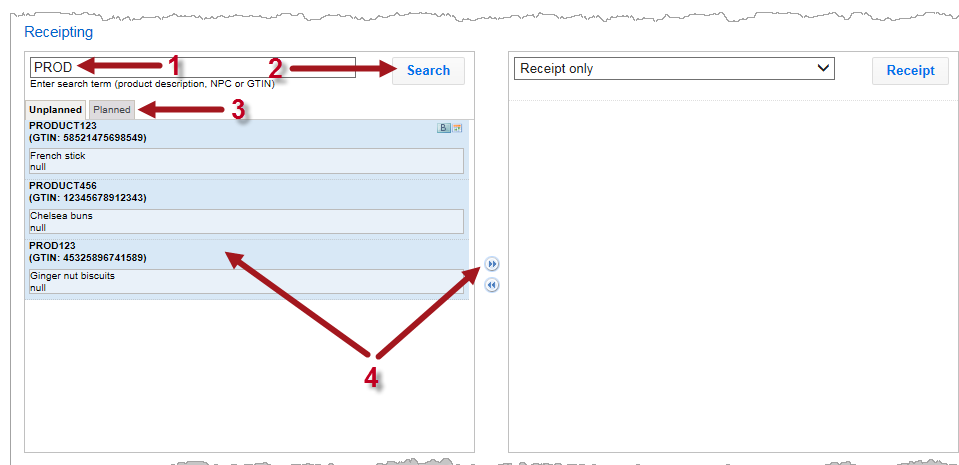
3 Choose the appropriate tab to Specify whether you are recording the Unplanned or the Planned receipt of products.

All products for which you have product definitions and that match the code or description are shown in a list in the box on the left.

4 To select products, you can either:
▪ Click the product for which you want to record the receipt of stock and, holding down your mouse button, drag it into the box on the right.
▪ Use the upper button between the two boxes to move *all* products to the list on the right.

To remove all products from the list on the right, click the lower two buttons between the boxes. To remove a single product, click the cross in the top right of its box.
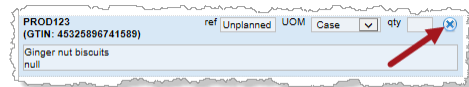
5 Repeat from step 1 to find all other products you want to receipt.

6 Select either **Receipt only** or **Receipt and put away** from the list of options.

7 For planned receipts, **ref** contains the order number. For unplanned receipts, optionally type a reference.

8 Specify the unit of measure (**UOM**), which defaults to the receivable UOM, and record the quantity (**qty**) you have received.

9 Click **Receipt**.
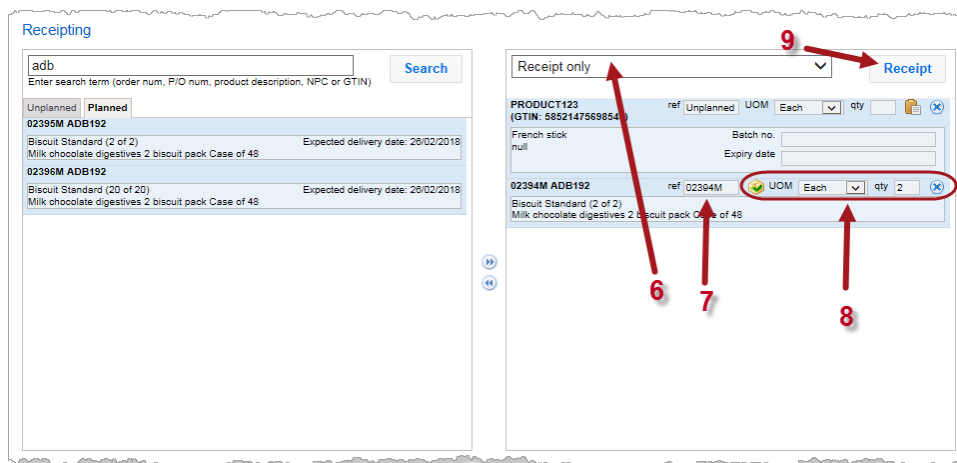
Monitoring expiry dates, serial numbers, and batch numbers (G)

If you are monitoring expiry dates, serial numbers, or batch numbers (specified as part of the product definition – see page 73), icons are shown to indicate what is being tracked:

S serial number is being tracked

B batch number is being tracked

  expiry date

Boxes are provided when processing the product for including the information required:

■ If you are tracking serial numbers, you must enter a serial number for each item in the group. The example below shows three serial numbers have been recorded for this product.

▪ You can add more by typing in the box indicated by the arrow.

- You can delete a serial number if you have added one by mistake by clicking the pink circle containing the cross ().

The quantity for this product is automatically set to the number of serial numbers recorded for it. Click **OK**.
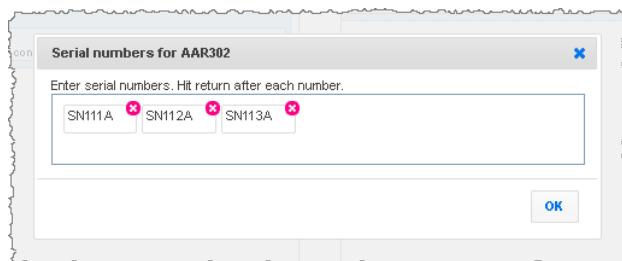
- If you are tracking **Batch no.** or **Expiry date**, boxes are displayed for this information to be recorded.
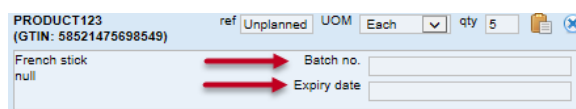
The example above shows the quantity (**qty**) and **Serial no.** information that was entered when recording serial numbers. This is for illustration only: serial numbers would not normally be recorded for this type of product.

If you enter an expiry date that is sooner than the minimum shelf life specified for this stage, a message is displayed to warn you that the shelf life is short.

- The paste icon () enables you to create another entry for the same product so you can specify different information (such as different batch numbers).

Planned receipting (**G**)

Additional reference numbers may be shown to the right of the order number (**A** in the image below):

- The current order number is shown first. If this is a computer-generated order – created for items with a lead time longer than the standard 48 hours - the number has a 'C' suffix. In this case, the original order number immediately follows in brackets.

- The purchase order number, if any, is shown last. This is only applicable for Blue Diamond and eDirect orders when a purchase order has been generated to fulfil the order.

You can search for an order using the purchase or sales order numbers, but you must search for the whole number.

The number of items in the order is shown to the right of the product name (**B**). The quantity you receive defaults to the number expected, but you can overwrite this if necessary (**C**).

By default, the delivery is marked as complete (**D**). If you expect a further delivery to complete this order, click the 'Delivery complete' icon to remove the tick (**E**).
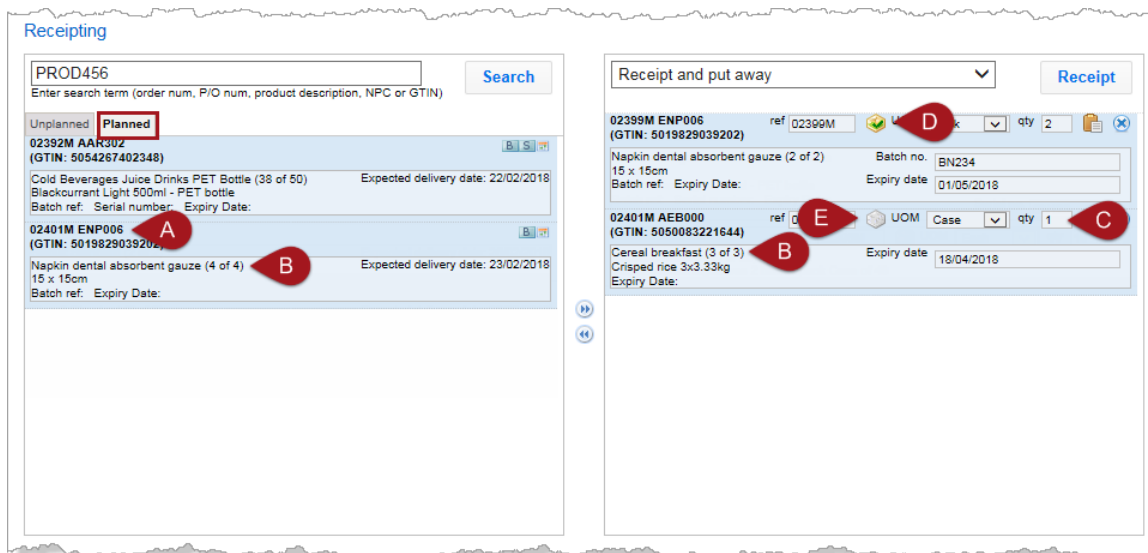
If you then receive the rest of the order, you can search for the product again. This time the number shown (**A** in the example below) reflects that you are only expecting 1 from an original order of 2.
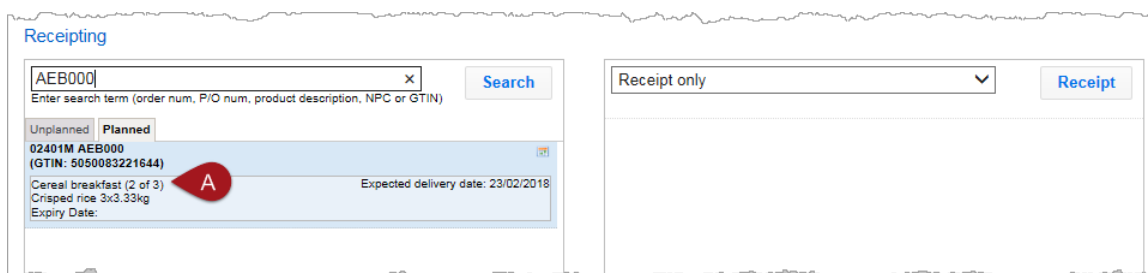
If you only receive a part order but are not expecting any more, you can specify the number you receive (**B**) but leave the icon to indicate that the order is complete (**C**). This order is no longer included in the list of matches for planned receipting.
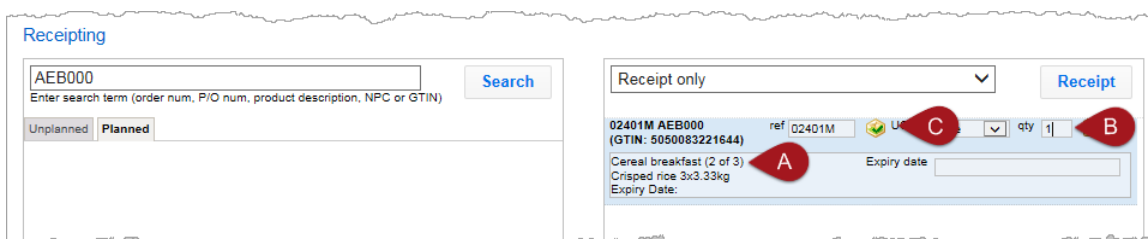
Put away stock (G)

If you did not choose 'receipt and put away' as a single process, you must put your stock away by selecting **Stock**, then **Stock management** and finally **Put away** from the menu.

The left lists all the stock available to put away. These items have been received (receipted) but have not yet been put away.

1 Click and drag the item from the list on the left to the list on the right. The item's heading remains on the left, but the details move to the right.

    1 Specify how many you want to put away from the total quantity for each product on the right. If you do not put away all a product now, it will be listed with the remaining quantity the next time you select **Put away** from the menu.
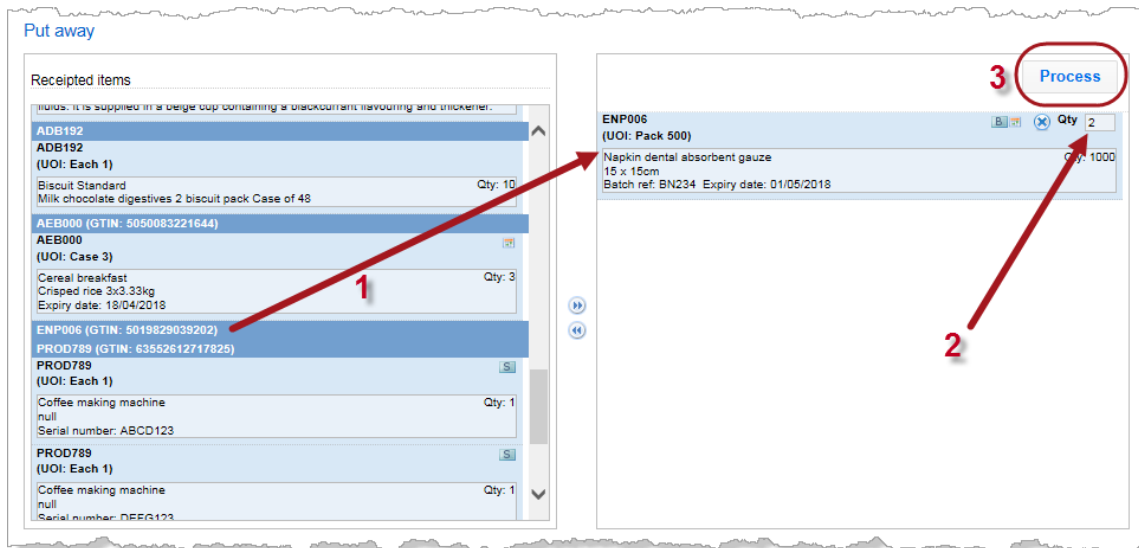
    2 Click **Process**.

If you are monitoring expiry dates, serial numbers, or batch numbers, a separate entry is created in the list of receipted items for each instance (each serial number, batch number, or expiry date) so that the products with shared values can be managed as a group.

Issue stock (G)

Issuing stock marks a quantity of a product as used. It reduces the quantity of stock held in the store. This also allows the allocation of this stock item to a Department and/or Client and to set a Local Reference number. Using the Issue function on the Web Application will not raise orders automatically. You can only issue stock to departments or clients who are on the site you selected when you log on to eDC Gold.

To issue stock, select **Stock**, then **Stock management** and finally **Issue** from the menu.

1 Drag the product(s) that you want to issue from the left to the right (or use the arrows between the boxes to move them all).

If serial numbers, batch numbers, or expiry dates are being monitored, make sure that you have selected the right product(s)—the same product may be listed more than once with different values.

If you are issuing this product by the case, the quantity available represents the number of cases. If you are issuing individually, the number available represents the number of individual units. For example, if you receive 10 cases each containing 20 items and are issuing individual items, you will have 200 available for issue.

---
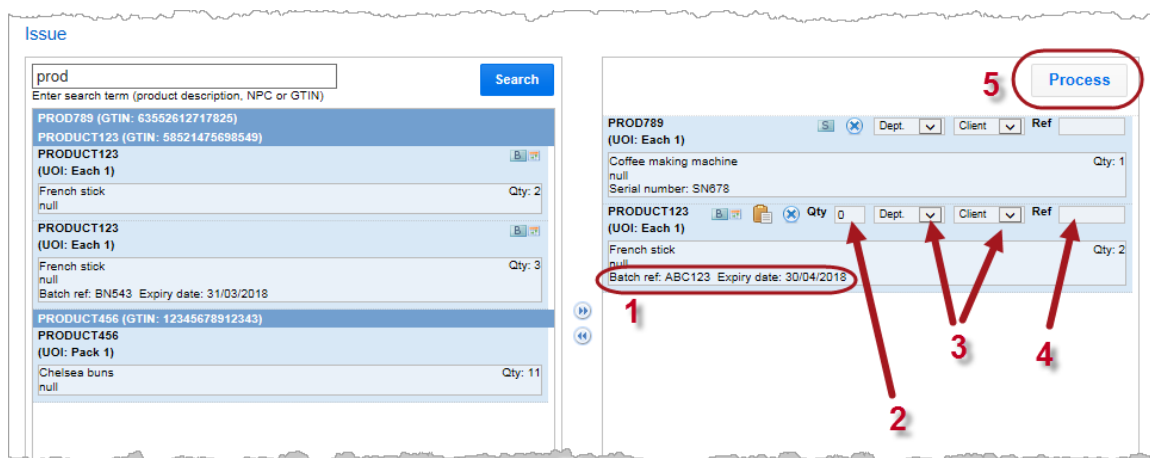
3 For each product, specify the quantity (**Qty**) that you will issue to this client or department.

4 Choose the department or client from the drop-down lists. You can only select one option – for example, if you want to specify a client, do not select a department.

If you want to issue the same product to a different department or client, click the paste icon (📋) to create a duplicate entry.

---

5 Optionally give this transaction a reference.

6 Click **Process** to issue the stock.

You cannot issue more of a product than you have in stock.

Return to stock (**G**)

The return to stock option is available from the **Stock** menu. Select **Stock management** and then **Return to stock**.

1 Search for the product code you want to return to stock.

7   Choose how many days results you want to show (1 means just show today's, 2 means show todays and yesterday's issues and so on).

8   Click **Search**.

Find the issued product in the list and drag it into the box on the right, making sure you match the client or department, the batch number, and the expiry date (if recorded).

9   State the quantity (**Qty**) you are returning to stock.

10 Click **Process**.

The quantity you returned is now available for re-issue or for return to the supplier (see below).

Return to supplier (G)

You may need to record that you have returned stock to the supplier. To do this select **Stock**, then **Stock management** and finally **Return to supplier** from the menu.

To return stock to the supplier:

1   Find it in the list on the left (see steps 1 to 8 of 'Return to stock (**G**)', above) and drag it into the box on the right.

11 Specify the quantity (**Qty**) you want to return.

12 Select a **Reason** from the drop-down list (displayed as the **Local Reference** in the **Transaction Log** – see 'Monitoring transactions (stock movements) (**G**)' on page 169).

The value at the top of the list – **Expired** – is selected automatically. Change this if it is not the correct reason.
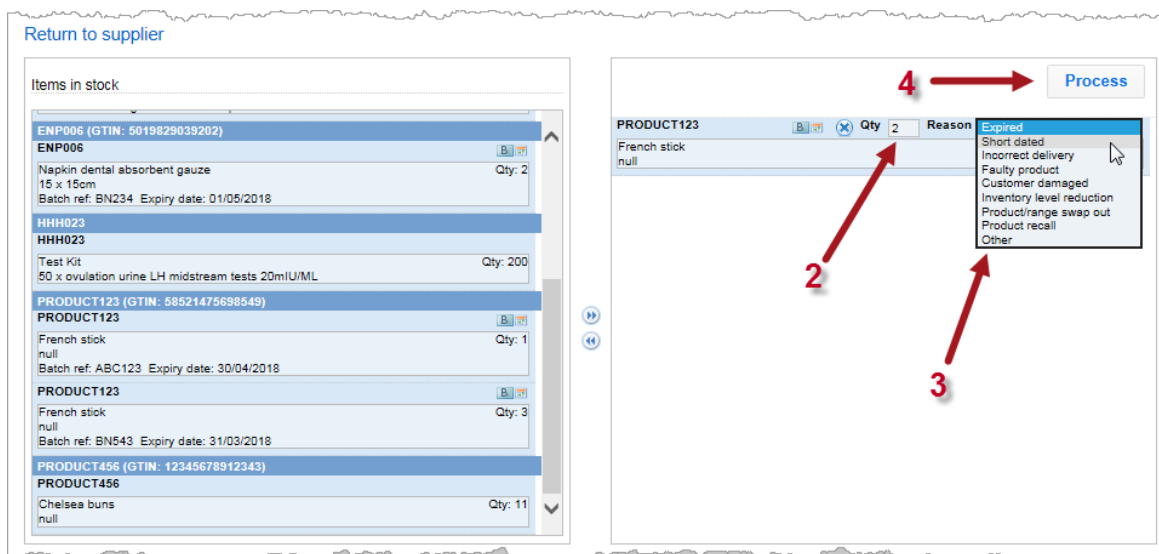
13 Click **Process** to remove selected products from stock.

Stock transfer (G)

You can transfer stock between sites and stores as long as:

- They are associated with the same MMD.

- You are currently logged on to the store that has a stock of the product.

- The destination store has a stock definition for the product to be transferred.

To transfer stock:

1 Select the **Destination Site** from the drop-down list.

14 Select the **Store** – if there is only one store at the selected site, this is automatically displayed and cannot be changed.

15 Find the product to be transferred from the list on the left and drag it to the right. Check all the details of the product, including batch number, serial number and expiry date (if shown).

16 Specify the quantity (**Qty**) to transfer.

17 Click **Process**.
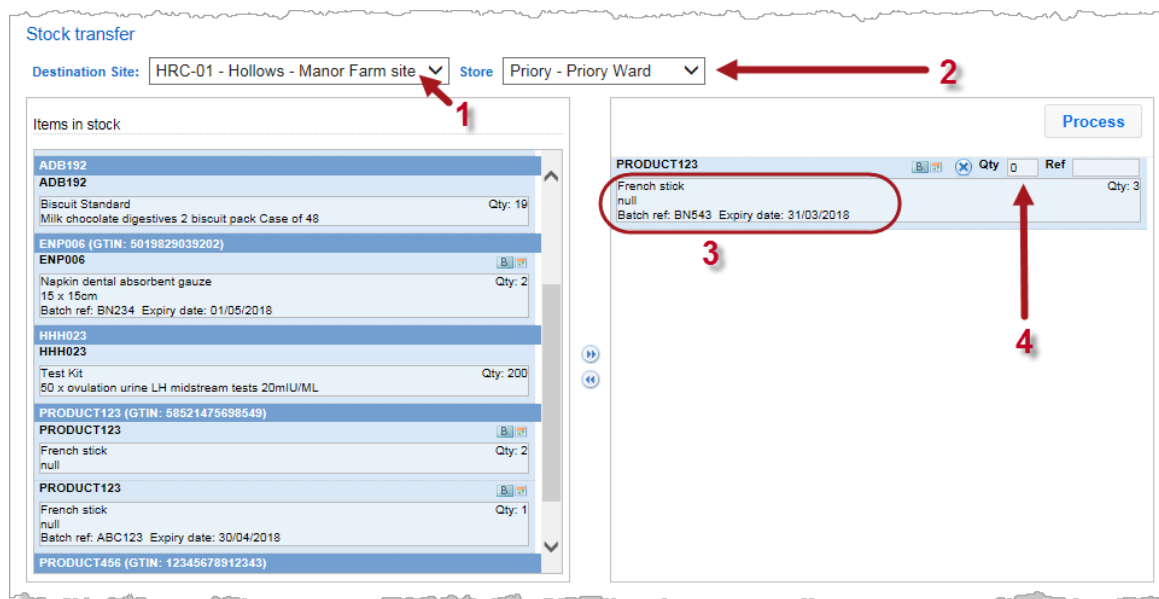
Locating your stock (G)

To see a list of your stock by location, select the **Stock** menu and then **Stock locator**.

The page that opens shows the quantity currently in stock and its **Primary location** (which may be a store or – if you are using locations with this store – the location designated as primary location for that stock item.

You can filter the results by specifying a full or partial NPC or GTIN. In the example, below, a partial NPC has been specified.

NPC GTIN	Product type	Base description	Secondary description	Quantity	Primary location	Bin location	Group key	Batch ref.	Serial no.	Expiry	Quarantined
PRODUCT123 58521475698549	Local	French stick		2	N/A	Store					☐
PRODUCT456 12345678912343	Local	Chelsea buns		11	N/A	Store					☐
PRODUCT123 58521475698549	Local	French stick		1	N/A	Store		ABC123		30/04/2018	☐
PRODUCT456 12345678912343	Local	Chelsea buns		10	N/A	Goods in					☐
PROD789 63552612717825	Local	Coffee making machine		1	N/A	Goods in			ABCD123		☐
PROD789 63552612717825	Local	Coffee making machine		1	N/A	Goods in			DEFG123		☐
PROD789 63552612717825	Local	Coffee making machine		1	N/A	Goods in			HIJK123		☐
PRODUCT123 58521475698549	Local	French stick		3	N/A	Store		BN543		31/03/2018	☐

Viewing your stock (G)

To see quantities of stock and its value, select the **Stock** menu and then **Stock view**.

Red, amber, and green discs to the left of each NPC indicate the stock levels of each item relative to either:

Maximum stock level (for products where auto-process is selected – see 'Creating a stock definition (G)' on page 73).

- Reorder level (for products where auto-process is not selected).

🔴	Current stock level + the quantity on order combined are less than the maximum stock level or reorder level (whichever is applicable).
🟡	Current stock level + the quantity on order combined are at the maximum stock level or reorder level (whichever is applicable), or higher.
🟢	The current stock level alone is at the maximum stock level or reorder level (whichever is applicable) or higher.

The totals at the bottom of each page are the totals for that page – if you have more than one page of results available, this is not an overall total.

The information on this summary page includes the **NPC** of the product as a link. Click this to see some details about this stock definition, as shown in the example below.

- The top of the page shows basic information about the product.

- The centre section specifies where different batches (based on expiry date and serial number) are held.

🔴	The expiry date has passed.
🟡	The expiry date is within the timeframe specified for the shelf-life warning (for example, it is in 7 days, and the shelf-life warning is set to 10 days). The tooltip shown for this colour indicates when the item will expire.
🟢	Either the shelf-life warning period has not been reached or the product does not have an expiry date. The tooltip either indicates when the item will expire or states that there is no expiry date.

- The locations associated with this store are shown at the bottom of the page, with an indication of which is the primary location.

Monitoring transactions (stock movements) (G)

To see an itemised list of the transactions that have been made, select the **Stock** menu and then the **Transaction log**.

A list of all transactions for the store you are currently associated with is shown. The name in the **Transacted by** column is the person who performed the transaction.

Filter the information shown by specifying a date range, an NPC/GTIN or a transaction type.

The totals at the bottom of each page are the totals for that page – if you have more than one page of results available, this is not an overall total.

Monitoring and resolving import failures (G)

Sometimes, attempts to update the information held about stock from the eDC Android application fail. For example, you may attempt to issue more stock than you currently have, and because this issue cannot be resolved automatically, the transaction fails. This usually happens if the Store being uploaded has not been synchronised with the web application causing the stock levels on the eDC Android application to be out of date.

A failed transaction log is available from the **Stock** menu: select **Import failures** from the menu and all outstanding failed transactions are listed.

- You can filter the display by date range, by **NPC** and by **Type** (by selecting from the drop-down list).

- You can order the display by clicking any column headers, except for **Actions**.

A 'Fail note' gives you a reason for the failure – you may be able to resolve the issue, or it may have resolved itself (for example, if more stock has been received.

For each failure, you have two options in the **Actions** column:

↻ You can retry the transaction, to see if it now succeeds. A message is displayed if the transaction fails again.
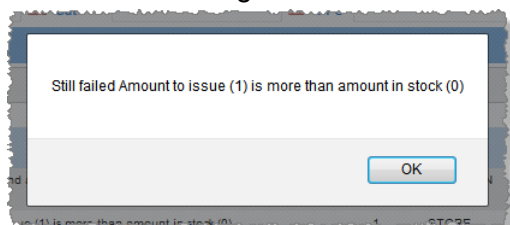

✔ You can ignore the transaction if it is no longer relevant.
The item is removed from the list. (You may need to refresh the page for it to disappear.)

Part 7: Reports

Orders are tracked through the system using the order tracking capabilities of 'Online ordering' and are described in the guidance notes associated with that application.

General eDC reports

All eDC reports are available from the **Reports** menu.
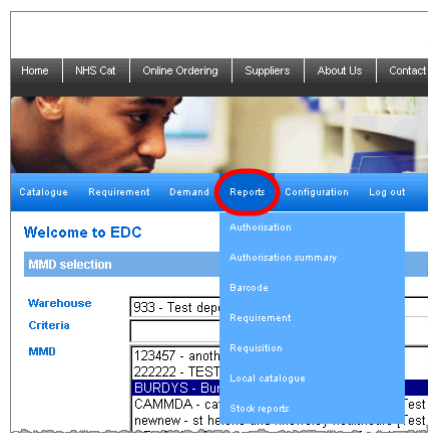
Authorisation report

The **Authorisation** report contains a list of products to be managed and is specific to a given requisition point. It includes all items where requirements have been set against specific NPC codes, whether these are stock, non-stock or internal lines.

At the foot of the report, the total number of lines where stock levels have been agreed and the total maximum stock value of those lines are shown. There is also a narrative to allow the authorised budget holder to sign off the report as a binding document between the budget holder and the procurement department, indicating the stock level parameters to be observed when replenishing stock.

The authorisation report should be agreed upon and authorised by the budget holder at least every 3 months to ensure the current requirements are reflected.

When generating an authorisation report, you can specify:

■ How the report should be ordered by selecting the **Print order** from the drop-down list.

■ The **Demand type** from the drop-down list.

■ The range of products to be included using **NPC from** and **NPC to**.

- If your NPC codes run from A to Z, type **A** in **NPC from** and **z** in **NPC to** – this includes the full range.

- If any of your codes begin with numbers, type **0** in **NPC from** and **z** in **NPC to** – this includes all codes.

■ Optionally specify a range for the **Group key**.

■ Select the requisition points to be included in the report from the list displayed in **Available req points**.

Click **Generate** to run the report and display the results on a screen. You can print the report if required.

To export the report directly to Microsoft Excel, click **Export**.

The authorisation report contains the following information.

■ The MMD number and name, the requisition point number, name and GLN for which the report has been generated, and the method of data capture are shown in the report heading on each page.

■ The body of the report lists each product and shows details for each of them. An example of an authorisation report is shown below.

This example report contains 48 pages – it was generated for several requisition points, and each requisition point begins on a new page.

EDC - Authorisation report

NHS Supply Chain

GENERAL MEDICINE DCGH
ReqPoint 770004 - WARD 312 DCGH (GLN: 5055205683386)

NPC	MPC	UOI	Brand	VLT	Group key	Type	Price	ROL	ROQ	MSL	Max Val	GL code
ELW041	4925	Pack 10	IV3000		TREAT	S	18.62	1.00	0.00	1.00	18.62	72623027
(GTIN: 5000223049256)												
Dressing IV vapour-permeable adhesive film sterile 10cm x 14cm												
ELW071	1623W	Pack 100	Tegaderm IV		TREAT	S	31.24	1.00	1.00	2.00	62.48	72623027
(GTIN: 5000485043283)												
Dressing IV vapour-permeable adhesive film sterile 6 x 7cm ported cannula												
ELW213	1626W	Pack 50	Tegaderm		TREAT	S	30.40	1.00	1.00	2.00	60.80	72623027
(GTIN: 5000485003966)												
Dressing vapour-permeable adhesive film sterile 10cm x 12cm												
ELY038	3343E	Box 25	Cavilon		TREAT	S	27.52	1.00	1.00	2.00	55.04	72623027
(GTIN: 8711428085884)												
Barrier film foam applicator no sting sterile 1ml												
ELY040	3346E	Each 1	Cavilon		TREAT	S	7.95	2.00	1.00	3.00	23.85	72623027
(GTIN: 8711428077582)												
Barrier film spray no sting sterile 28ml Pump Action												

Items: 5

220.79

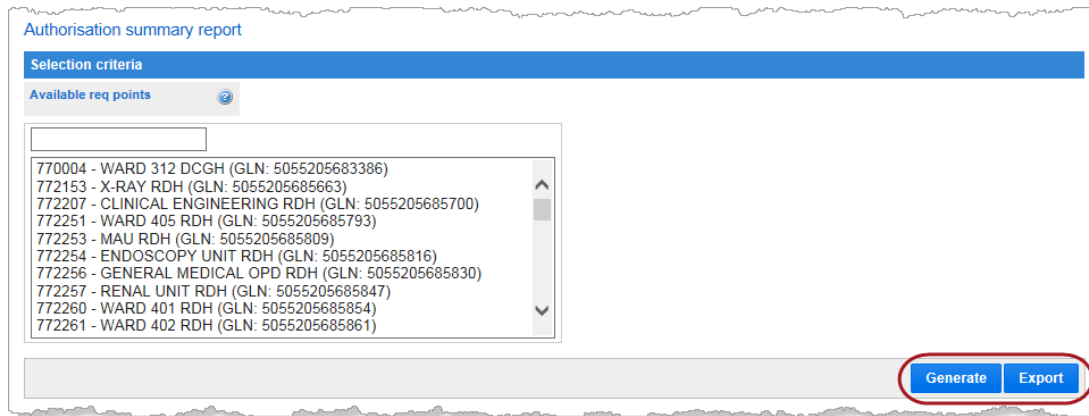Authorised by _____ Designation _____
Name (Print) _____ Date _____

Page 1 of 48   07/02/2018

Authorisation summary report

If you only want to see the total number of lines and total value for each requisition point, use the **Authorisation summary** report.

Select the requisition points that you want to be included from the list displayed in **Available req points**.

Click **Generate** to display the report on the screen (from where you can print it), or **Export** to export the information to Microsoft Excel.

A sample of an **Authorisation Summary Report** is shown below:

Printing barcodes

To print barcodes, select **Barcode** from the **Reports** menu.

1   Choose the appropriate template for the barcodes you want to print from the drop-down list in **Label type**. There are currently three barcode templates:
   - Bin labels
   - Bin labels with requisition point barcodes
   - Catalogue sheets

Bin labels are designed to be printed on A4 label type L7162.

2   Choose how you want the barcodes to be ordered. In **Print order**, select **NPC**, **Group key**, **Description** or **GTIN**.

3   You must specify an NPC range using **NPC from** and **NPC to**.

- If the NPC codes run from A to Z, type **A** in **NPC from** and **Z** in **NPC to** – this includes the full range.
- If any of the codes begin with numbers, type **0** in **NPC from** and **Z** in **NPC to** – this includes all codes.

4 Optionally specify a range for the group key in **Group key from** and **Group key to**.

5 If you only want to include barcodes modified after a certain date, click the calendar icon and select the date from the calendar when it opens.

6 Select the requisition points to be included in the report from the list displayed in **Available req points**.

7 Click **Generate** to create the barcodes for printing.

If your Internet settings do not allow pop-ups, hold down the CTRL key when clicking **Generate**. This will allow the pop-up to be displayed.

The barcodes will look like the small example below.
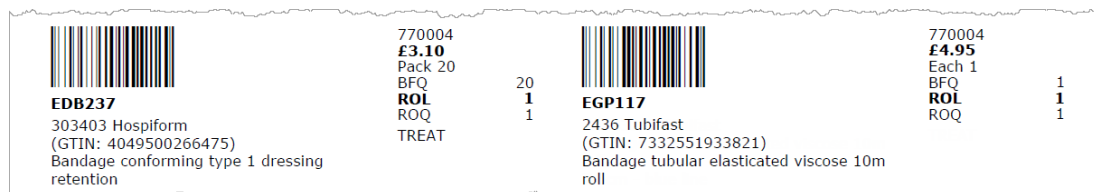
You can print the barcodes by using the standard **Print** option.

When printing barcodes, make sure that **Page Scaling** is set to **None** and that **Auto-Rotate and Center** is *not* selected. Check also that the paper size for the printer (in **Properties**) is set to A4.
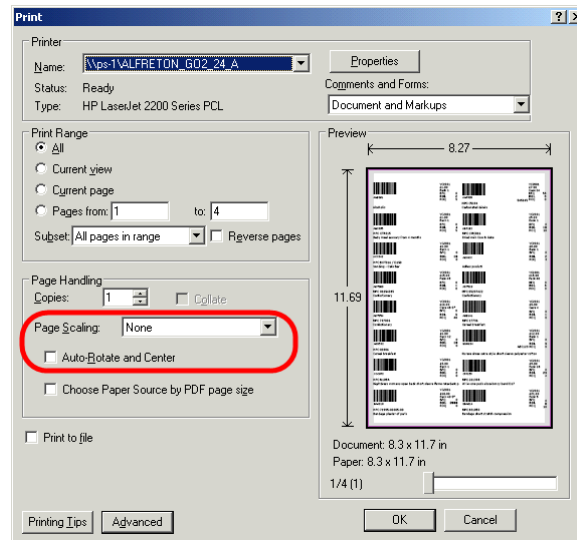
Requirement report

This report summarises the actual purchase history. It includes products that have been purchased from all ordering sources, not just eDC, over a full 12-month period, not including the current month.

The financial periods follow the NHS Financial calendar, which is published on the NHS Supply Chain website.

1 Select the appropriate option from Print order to order the report by **NPC**, **Description**, **GTIN**, or **Group Key**.

2 Optionally specify a range of NPC codes by entering full or part codes in **NPC from** and **NPC to**. These are treated in alphabetical order when determining the range to include in the report.

3 Optionally specify a range of group keys to include by typing full or part group codes in **Group key from** and **Group key to**.

4 Select the requisition point(s) you want to include from the list.

5 Click either **Generate** (to create a PDF for viewing on screen or printing) or **Export** (to obtain the information in a format suitable for opening in a spreadsheet).

The report shows the following information, grouped by requisition point:

- The **NPC** code and **Brand** of the product. A brief description is shown on the second line.

- The Unit of issue (**UOI**)

- The quantities issues in previous months, individually for the last 6 complete months, then combined for the 6 months prior to that (working from the oldest to the most recent).

  NPCs with no demand will be shown with zero quantities.

- Details of the requirement:
  - **ROL** (reorder level). This will only be shown where requirements have been defined within RESUS, otherwise N/A will appear.
  - **ROQ** (reorder quantity). Dependant on the method of data capture chosen, this is either the fixed quantity for automatic replenishment or the difference between reorder level and maximum stock for top up ordering.
  - **MSL** (maximum stock level). This is **ROL** + **ROQ**.
- The average weekly value and issue quantity.

  This information is based on the total purchases for the last 12 RESUS periods and divided by 52 weeks. This figure is always rounded up and is an average figure only.

  The value of the weekly issue quantity shown to two decimal places.

Products with a scaling factor applied (see 'What is a scaling factor?' on page 52) are highlighted with an asterisk.
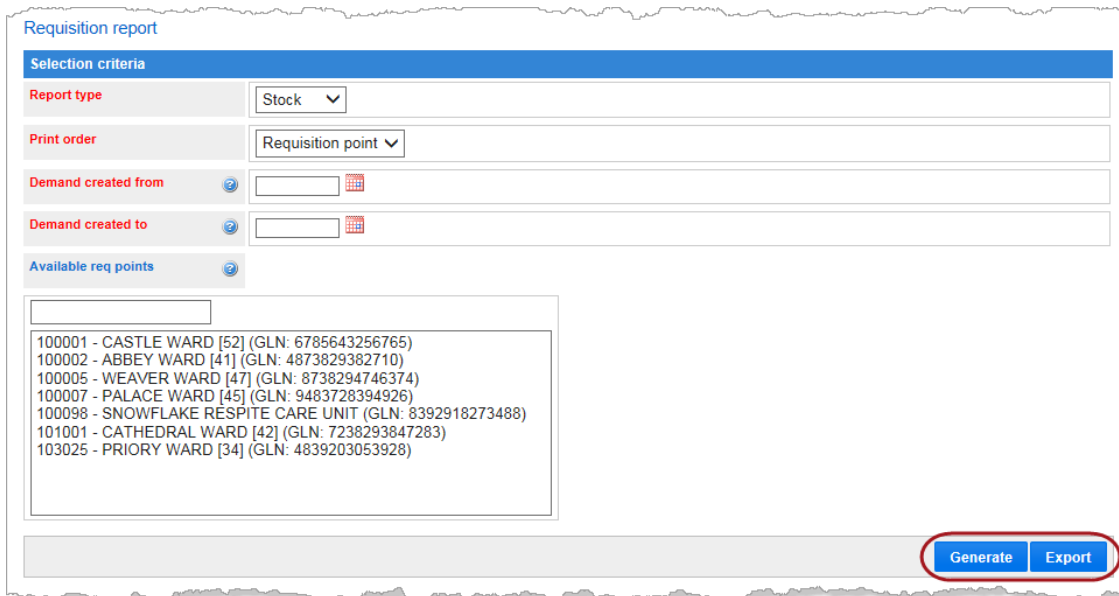
EDC - Requirement report

NHS Supply Chain

AJP123 Hollows Respite Care Unit
100001 - CASTLE WARD [52] [Top up] (GLN: 6785643256765)

NPC	Brand	UOI	Previous monthly issue quantity							Requirement			Av weekly summary	
			7-12	6	5	4	3	2	1	ROL	ROQ	MSL	Value	Issue
PROD123 (GTIN: 45325896741589) Ginger nut biscuits		Case 20	0	0	0	0	0	0	0	10	-	10	0.00	0.00
PROD456 (GTIN: 58965412385749) Rich Tea Biscuits		Each	0	0	0	0	0	0	0	1	-	1	0.00	0.00
PROD789 (GTIN: 63552612717825) Coffee making machine		Each	0	0	0	0	0	0	0	1	-	1	0.00	0.00
PRODUCT123 (GTIN: 58521475698549) French stick		Each	0	0	0	0	0	0	0	10	-	10	0.00	0.00
PRODUCT456 (GTIN: 12345678912343) Chelsea buns		Pack	0	0	0	0	0	0	0	10	-	10	0.00	0.00
PRODUCT789 (GTIN: 58967415896239) Lemonade - no sugar		Bottle	0	0	0	0	0	0	0	24	-	24	0.00	0.00

6 products for 100001 - CASTLE WARD [52] [Top up] (GLN: 6785643256765)   Average weekly totals: 0.00   0.00

If you export the file to Microsoft Excel, the group key, maximum stock level, brand and MPC are included.

Requisition report

1 Select the **Report type** from the drop-down list. This is based on the category of products being requisitioned.

2 Select the order in which you want the information displayed by selecting an option from the drop-down list in **Print order**.

3 You must specify **Demand created from** and **Demand created to** dates by clicking on the calendar icon and selecting appropriate dates.

4 Select the requisition points to be included from the list in **Available req points**.

5 Click **Generate** to display the report on screen (it can be printed). Click **Export** to export the information to Microsoft Excel.
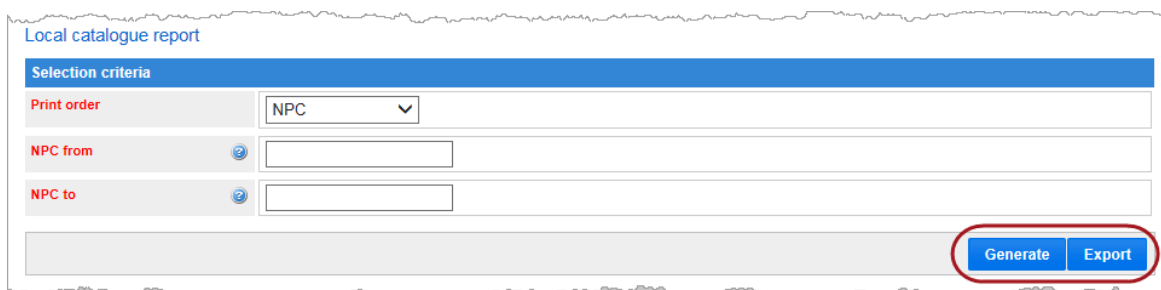
The non-stock report type groups by supplier.

Local catalogue report

This report displays a list of an organisation's local products.

1   Select **Local catalogue** from the **Reports** menu.

2   Choose the order in which you want the information displayed from the drop-down list.

3   Specify the NPC codes to include in the report:

-   If your NPC codes run from A to Z, type **A** in **NPC from** and **Z** in **NPC to** – this includes the full range.

-   If any of your codes begin with numbers, type **0** in **NPC from** and **Z** in **NPC to** – this includes all codes.

4   Click **Generate** to display the report on screen (it can be printed). Click **Export** to export the information to Microsoft Excel.

An example of a local catalogue report is shown below.

EDC - Local catalogue report

NHS

NHS Supply Chain

GENERAL MEDICINE DCGH

NPC	Base description	Supplier ref	Supplier	UOI	Price	E-class	Expense code
AA029 (GTIN: 7483738473828)	NURSING DUTY ROTA			Each 1	0.00		
AA041 (GTIN: 64738273645366)	SENSITIVE/ALLERGIC LABELS			Each 1	0.00		
AA057 (GTIN: 57483928374657)	PEAK FLOW			Each 1	0.00		

Stock reports

All stock reports are available from the **Stock reports** option on the main **Reports** menu.

When relevant criteria have been specified, you can:

- ■ **Generate** a PDF for viewing on screen or printing.

- ■ **Export** the data in a format suitable for opening in Excel.
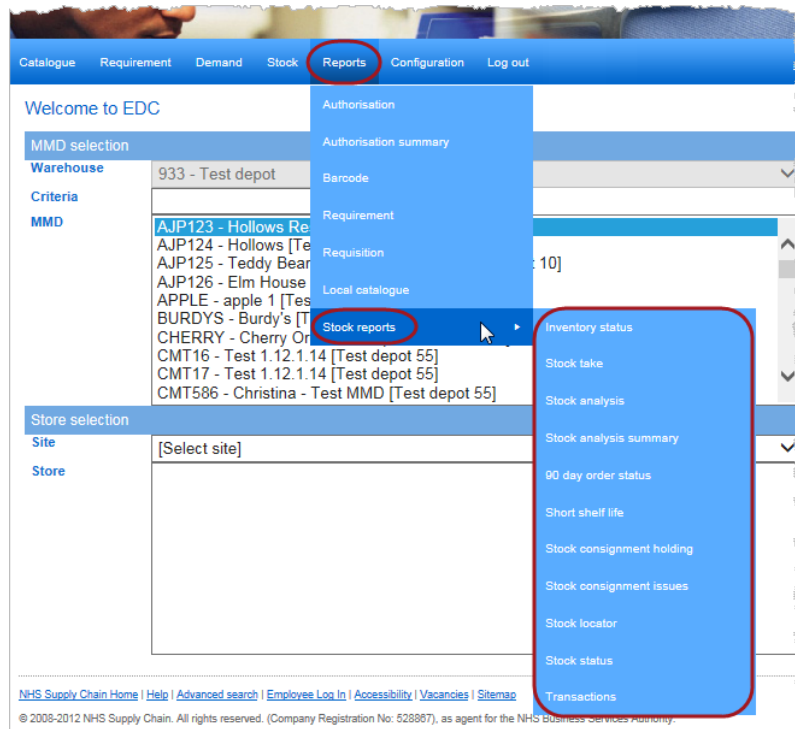
Inventory status report

The 'Inventory status report' shows the value of items waiting to be processed in demand management. This report is for organisations using automatic or top up replenishment.

To run this report, select **Reports**, then **Stock reports** and finally **Inventory status** from the menu.

Click **Generate** to create the report in PDF format, or **Export** to obtain the information in a format suitable for opening in a spreadsheet.

Stock take report

The stock take report shows the value of items captured during a stock.

Select **Reports**, then **Stock reports** and finally **Stock take** from the blue menu.

Select the **Print order** for your report from the drop-down list. You can order it by **NPC**, by **Base description** or by **GTIN**.

Click **Generate** to create the report in PDF format, or **Export** to obtain the information in a format suitable for opening in a spreadsheet.

The report shows the results from the last four stocktakes for comparison. An example report is shown below.

In the exported version of the report the types - Stock, External and Internal are expressed in two columns:

Local Item	Internal	Equals:
TRUE	TRUE	Internal
FALSE	FALSE	Stock
TRUE	FALSE	External

Stock analysis report

This report is based on the last 52 weeks of issues and displays the weeks' cover and stock turn calculations at the product level within the requisition point. This report is designed to assist organisations with efficient stock control.

To generate this report:

1 Select the **Reports** option on the blue menu, then **Stock reports** and finally **Stock analysis**.

2 Complete appropriate criteria to generate the required information.

3 Click **Generate** to create the report in PDF format, or **Export** to obtain the information in a format suitable for opening in a spreadsheet.

DB0720 GENERAL MEDICINE DCGH
770004 - WARD 312 DCGH [Manual] (GLN: 5055205683386)

NPC	Brand	UOI	ROL	Requirement ROQ	MSL	Scaling	Stock value	Average weekly summary Value	Issue	Cover	Stock turn
EDB008 (GTIN: 4049500266451) Bandage conforming type 1 dressing retention 6cm x 4m Knitted	Hospiform	Pack 20	-	-	-	-	0.00	0.04	0.02	-	-
EDB067 (GTIN: 4042809265279) Bandage conforming type 1 dressing retention 10cm x 4m Knitted	EasiFix K	Pack 20	-	-	-	-	0.00	0.23	0.08	-	-
EDB237 (GTIN: 4049500266475) Bandage conforming type 1 dressing retention 10cm x 4m Knitted	Hospiform	Pack 20	1	1	2	1	6.20	0.20	0.08	26.00	2.00
EDB239 (GTIN: 4049500266482) Bandage conforming type 1 dressing retention 12cm x 4m Knitted	Hospiform	Pack 20	-	-	-	-	0.00	0.08	0.02	-	-
4 products for 770004 - WARD 312 DCGH [Manual]							6.20	0.55	0.19		

- **Stock Value –** This is calculated by a 'max stock level' figure.

  Firstly, the 'max stock level' is calculated for products which have a requirement. If the replenishment type is top-up, use the re-order level. If it is Automatic or Manual, use the re-order level + re-order quantity.

  Secondly, scaling is then taken into consideration. If the 'max stock level' is greater than 0 and scaling is greater than 1, then we have a 'Max Stock Level Scaled' value calculated by doing max stock level/scaling; otherwise "Max Stock Level Scaled" just equals the 'max stock level'.

  Finally, the stock value is calculated by 'Max Stock Level Scaled' x product base price.

- **Average Weekly Value –** this is calculated using the 'Total Sales' figure and dividing by 52.
- **Average Weekly Issue –** this is calculated using the 'Quantity Supplied' figure and dividing by 52.

Stock analysis summary report

This report is based on the last 52 weeks of issues and displays weeks cover and stock turn calculations summarised at requisition point level. It is designed to assist organisations with efficient stock control.

To generate this report:

1   Select the **Reports** option on the blue menu, then **Stock reports** and finally **Stock analysis summary**.

2   Click **Generate** to create the report in PDF format, or **Export** to obtain the information in a format suitable for opening in a spreadsheet.

EDC - Stock analysis summary report

NHS NHS Supply Chain

DB0720 GENERAL MEDICINE DCGH

	Stock level	Stock value	Average weekly summary			
			Value	Issue	Cover	Stock turn
770004 - WARD 312 DCGH (GLN: 5055205683386)	1,089	4,019	795.06	197.94	5.50	9.45
772153 - X-RAY RDH (GLN: 5055205685663)	1,962	7,506	3,125.96	837.37	2.34	22.19
772207 - CLINICAL ENGINEERING RDH (GLN: 5055205685700)	0	0	1,736.58	8.73	0.00	0.00
772251 - WARD 405 RDH (GLN: 5055205685793)	1,528	9,738	1,457.80	439.62	3.48	14.96
772253 - MAU RDH (GLN: 5055205685809)	6,981	78,669	2,887.07	1,050.06	6.65	7.82
772254 - ENDOSCOPY UNIT RDH (GLN: 5055205685816)	1,018	3,207	1,922.32	459.21	2.22	23.46
Totals	12,578	103,139	11,924.77	2,992.92		

eDC Gold Stock Reports (G)

If you are using eDC Gold, the following reports are all available from the **Stock** section of the **Reports** menu.

Order status (G)

The Order Status report runs for the store that is currently active. The report will show all orders generated with Planned Receipts from the date entered. By default, this will exclude orders that have been **Fully Rceipted**. Deselect that Exclude Fully Receipt Lines option to see those Orders. The PDF version is colour-coded based on the **Order status**:

- Fully Receipted (Shown in **Green**) - All expected quantities on the order line have been received. Lapsed orders (shown in red) are orders that have not been received and for which the total of the delivery lead time and the receipting lead time has passed.

- Partially Receipted (shown in **Amber**) - Some of the quantity on the order line has been receipted and has not been marked as complete.

- Over Receipted (Shown in **Green**) - The receipted quantity exceeds the order quantity.

- Marked Complete (Shown in **Green**)—Some of the quantity on the order line has been received and marked as complete.

- Stock Due (shown in **Amber**) - No quantity has yet been received.

- Overdue (shown in **Black**) - Beyond the expected lead time.

- Lapsed (shown in **Red**) - The order has passed the expected delivery date + lead time (receipt + product lead times). And has been removed from planned receipting.

- Cancelled - The Order Line has been cancelled when no product has been receipted in.

- Partially Cancelled - when some product has already been receipted but the rest of the order line has been cancelled

Where applicable, the **Primary sales order number** and **Purchase order number** are shown:

- A **Primary sales order number** is shown when a computer-generated order is created for Blue Diamond orders that are redirected. The Primary sales order number is the original order. The new (computer-generated) order always has a 'C' suffix.

- A **Purchase order number** is generated by the order management system for Blue Diamond and eDirect products.

The information in the report is sorted by order date, then order number, supplier, and NPC.

EDC - Order status report

Order status – spreadsheet version (G)

This version of the report contains all the information in the PDF version, plus:

- **Planned expected quantity**
- **Application name** – the application's name used to place the order.

eDC	Order placed using the eDC application
Online ordering	Order placed using the Online Catalogue and Ordering application
EDI	Order placed using the EDI interface
CMS	Order placed by customer services
CRG	Computer-generated order

Short shelf life report (G)

This report enables you to identify stock due to expire within a specified number of days. You can choose to **Generate** the report in PDF format, view it on screen, print it, or **Export** it in a format suitable for opening in a spreadsheet.

The spreadsheet version is not colour-coded but does contain additional information – see 'Short shelf-life report – spreadsheet version (G)' on page 188188.

- Stock with a status of "Red" (shown in red text in the PDF) has already expired.

- Stock with a status of "Amber" (shown in orange text in the PDF) has not yet expired but has entered the shelf-life warning period.

- Stock with a status of "Green" (shown in green text in the PDF) is within the cut-off period specified when running the report but has not yet reached the shelf-life warning period.

Summaries of the stock value in that status are shown at the end of each section.

EDC - Short shelf life report

NHS
NHS Supply Chain

AJP123 - Hollows Respite Care Unit
103025 - PRIORY WARD [34] (GLN: 4839203053928)
Priory - Priory Ward

NPC	MPC	eClass	Group key	Expiry date	Shelf life warning	Consign	Qty	Unit cost	Total value	Batch ref	Serial numb
Expiry status - Red											
AAR315 Cold Beverages Cordials Blackcurrar Light 600ml				31/01/2013	5	N	2	37.16	6.19	123rty	
AAR315 Cold Beverages Cordials Blackcurrar Light 600ml				28/02/2013	5	N	4	37.16	12.39	123rty	
Expiry status - Red									18.58		
31.72% value % of total value											
23.08% quantity % of total quantity											
Expiry status - Amber											
PRODUCT789 Lemonade - no sugar (GTIN: 58967415896239)	AAD Supplier123			28/02/2018	28	N	10	2.00	20.00		
Expiry status - Amber									20.00		
34.14% value % of total value											
38.46% quantity % of total quantity											
Expiry status - Green											
PRODUCT789 Lemonade - no sugar (GTIN: 58967415896239)	AAD Supplier123			21/03/2018	28	N	10	2.00	20.00		
Expiry status - Green									20.00		
34.14% value % of total value											
38.46% quantity % of total quantity											
4 products for 103025 - PRIORY WARD [34]									58.58		
4 products in total									58.58		

Page 1 of 1

Short shelf-life report – spreadsheet version (G)

The spreadsheet version of the report contains everything in the PDF version plus the following specified as part of the stock definition (see 'Stock definitions (G)' on page 7373):

- **Rec shelf life days** – the **Shelf life receipt warning (days)** value.

- **Latest VAT rate**

- **Consignment level** – the **Consignment stock level**

Stock consignment holding report and stock consignment issues report (G)

Consignment stock is stock held at your site but that still belongs to the supplier. It has been delivered but is not paid for until it is issued.

Two reports help you to track these products, showing which suppliers they have come from and whether you still have them in stock or have issued them. The two reports are:

- Stock consignment holding

- Stock consignment issue

Both reports are available from the **Stock reports** group on the **Reports** menu. You can **Generate** the report to create it in PDF format or **Export** it to obtain the information in a format suitable for opening in a spreadsheet.

Stock locator report (G)

This report can be generated as a PDF or exported as a spreadsheet. Both versions show the quantity and location of stock for the store you are currently associated with. You can specify all or part of the **NPC**, **MPC** or **Group key**.

Multiple rows may be shown for the same product and location (see example below) if there is a difference in **Serial number**, **Batch reference** or **Expiry date**.

Stock status report (G)

The **stock status report** shows the current stock levels of any stores within the MMD. You can select one store or multiple stores using the Requisition Point list (Using Shift to left groups or Ctrl to select individually). You cannot specify any other criteria for this report, but you can **Generate** a PDF or **Export** the information to a spreadsheet.

The PDF version of the **Stock status** report – shown below – includes a breakdown of products by **Batch ref** and **Serial number** (where appropriate) with the associated **Expiry date**. The spreadsheet version does not include that level of detail.

Transactions report (G)

The **Transactions** report enables you to track stock movements. It is available from the **Stock reports** group on the **Reports** menu.
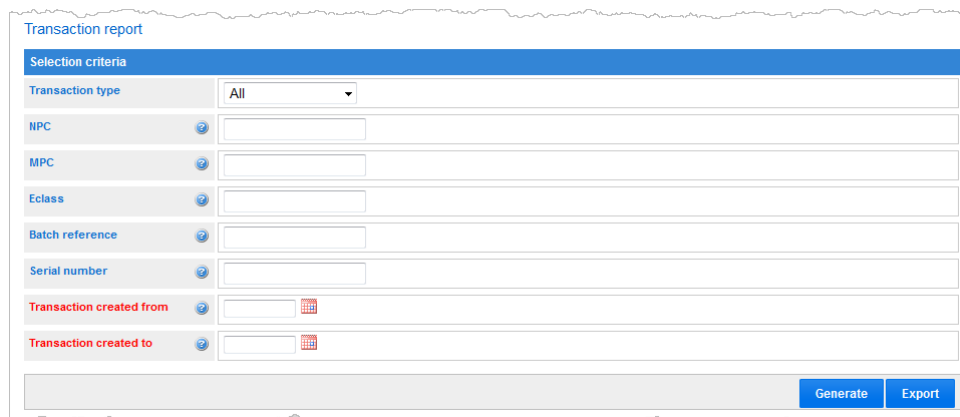
This report shows the product details, the transaction type, the unit cost, the name of the person who performed the transaction, the stock type (whether this is a stock or a local product) and the total value of the products.

To reduce the quantity of information displayed, or to find information on a particular product, various selection criteria are available.

- **Transaction type** is selected from a list of possible transaction types.
- Specify full or partial **NPC**, **MPC** or **Eclass** codes to search for a particular product or range of products.

- A **Batch reference** further restricts the search within a product, and **Serial number** identifies a single item.

- **Transaction created from** and **Transaction created to** are both mandatory – you have to enter something to limit the number of results returned.

Transaction report

Selection criteria		
Transaction type		All
NPC		
MPC		
Eclass		
Batch reference		
Serial number		
Transaction created from		
Transaction created to		

Generate   Export

Click **Generate** to create the report in PDF format, or **Export** to obtain the information in a format suitable for opening in a spreadsheet.