

Electronic Demand Capture (incorporating eDC Gold)

Guidance Notes

Web version v1.26 Android application version v2.6.10



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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:

igoplus 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

<u> </u>	Demand created automatically from information held about requirements and current stock levels.
<u> </u>	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
В	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
8	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 <u>CS Helpdesk</u>, which can help diagnose the issue and may refer you to your local IT department to resolve it. (Phone 0800 086 8670 or email <u>CSHelpdesk@supplychain.nhs.uk</u>).

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





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 <u>https://www.supplychain.nhs.uk/</u> 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).
 - My Supply Chain Savings My Supply Chain Home Information Log In TR Reports Log In eDC Log In Stu Online Catalogue Home Delivery Log In Duiting Log In



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.

eDC	NHS Supply Chain	NHS
Please enter your username		
Please enter your password		
Login	Forgotten	your password?
This application requires either Microsoft Internet Explore Any other configuration is not supported and may mean t		
Important - please note: Unauthorised access to data on misuse act 1990 and, as such, will render the offender lia legitimate bounds of your authorised access and under n party	ble to criminal prosecution. You mus	st not exceed the

- 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.

eDC	NHS Supply Chain	S
Please use the form below to request a new p to change it the next time you log on. Please enter your username	password via email. You will be prom	oted
1		
Please enter the corresponding email address		
Reset my password		

- 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.

Catalogue Requir	ement Demand Reports Configuration Log out	Mrs Jane Peo <u>AJP123 - Hollows Respite Care Unit</u> (edit
Welcome to El	DC	
MMD selection		Currently assigned roles
Warehouse Criteria	933 - Test depot	Authorise and send orders Connect eDC
MMD	AJP123 - Hollows Respite Care Unit [Test depot 10] MVIEW - Mountain View Respite Care Unit [Test depot 10]	eDC administrator eDC catalogue management eDC requirement authoriser NHS catalogue Requisitioner

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.

		AJP123 - Hollows Respite Care Unit [edit	
Velcome to	EDC T		
MMD selection		Currently assigned roles	
Warehouse	933 - Test depot	+ Authorise and send orders	
Criteria		Connect eDC	
MMD	AJP123 - Hollows Respite Care Unit [Test depot 10]	eDC administrator	
	MVIEW - Mountain View Respite Care Unit [Test depot 10]	eDC catalogue management	
		eDC requirement authoriser EDC Stock Management	
		NHS catalogue	
		Requisitioner	
		-	
Site	HRC-01 - Hollows - Manor Farm site	~	
	Castle - Castle Ward	*	
Store			
Store	Priory - Priory Ward		
Store			
Store			
Store			

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.

Catalogue	Requirement	Demand	Reports	Configuration	Log out	Mrs Jane Peok <u>AJP123 - Hollows Respite Care Unit</u> (edit)
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		·/~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	have an and the second and the second s



## 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.

Search res			Showing all 5 results	
Page size	10 <u>25 50 100</u>			Prev Page 1 Next
IMD	Name	Depot	District	
JP123	Hollows Respite Care Unit	Test depot (933)	COUNTESS OF CHESTER NHS TRUST (10)	Edit
IVIEW	Mountain View Respite Care Unit	Test depot (933)	COUNTESS OF CHESTER NHS TRUST (10)	Edit
ESTYC	YC test depot	Test depot (933)	SUE RYDER CARE HOMES (YC)	Edit
ALE	Vale View	Test depot (933)	COUNTESS OF CHESTER NHS TRUST (10)	Edit
ALKER	Jordialex	Test depot (933)	SUE RYDER CARE HOMES (YC)	Edit
Page size	10 <u>25 50</u> <u>100</u>			Prev Page 1 Next

- 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 dropdown 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	0	AJP125		
MMD name		Teddy Bears Respite Care Unit		
Depot		933 - Test depot	▼	
District		10/TST COUNTESS OF CHESTER NHS TRUST	•	
Active		V		
MMD settings				
Catalogue		Test depot 10 (apeck on 21/08/2012 15:28:14)	Who shares this cata	ilogue?
Supplier list sort order	0	Supplier reference	•	
Back to MMD list				Save

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

- 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.

View MMD details for 'T	eddy Bears Respite Care Unit'
MMD 'AJP125' created	I successfully
MMD details	
MMD short name	AJP125
MMD name	Teddy Bears Respite Care Unit
Depot	Test depot (933)
District	COUNTESS OF CHESTER NHS TRUST (10)
Active	Yes
Created by	PECKA on 27/02/2013 11:27:27
MMD settings	
Catalogue	Test depot 10 (apedk on 21/08/2012 15:28:14)
Supplier sort order	Reference
Configured requisition poi	hts
nere are no requisition points	defined within this MMD
Back to MMD list C	reate new reg point Move reg points Edit

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

Configured requisition points
Req points cannot be moved as no other MMD shares the same catalogue.
There are no requisition points defined within this MMD
Back to MMD list         Create new req point         Edit

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).

Requisition point details		
Requisition point	100098 - SNOWFLAKE RESPITE CARE UNIT (GLN: 8392918273488)	~
Replenishment method	Тор ир	~
External location	AJP123a	~
PLIC External location	AJP123b	
Price breaks		
Price break percentage	20	
Pricing mechanism	Banded pricing	~
ocal reference		
Active		

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  $16 \times \pounds 1.50$  and ordering 12 of the product will cost  $12 \times \pounds 1.80$ .

Banded pricing works by breaking the quantity ordered into bands.
 In this case, ordering 16 of the product will cost 15 x 1.50 plus 1 x £2 and ordering 12 of the product will be charged at 10 x 1.80 plus 2 x 2.

You must specify an external location if you want orders from the local catalogue to be autoprocessed (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.

Requisition point '100098	- SNOWFLAKE RESPITE CARE UNIT' updated successfully	8
Requisition point details		
Requisition point	100098 - SNOWFLAKE RESPITE CARE UNIT (GLN: 8392918273488)	
Replenishment method	Торир	
External location	AJP123a	
PLIC External location	AJP123b	
Price breaks	Yes	
Price break percentage	20	
Pricing mechanism	Banded pricing	
ocal reference		
Preferred delivery days		
Active definition	Yes	
Created by	Mrs Alison Peck on 08/01/2018 13:00:51	

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**.



Import requirements from another re	q point	×
Import requirements		
Select requisition point to imp	ort from	
Destination requisition point	100098 - SNOWFLAKE RESPITE CARE UNIT (GLN: 8392918273488)	
Source MMD	AJP123 - Hollows Respite Care Unit [Test depot 10]	
Source requisition point	103025 - PRIORY WARD [34] (GLN: 4839203053928) [6 requirements]	~
		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.

	Import requirements from another req point	
	Import completed	
	Import completed, 5 requirements imported	
Ļ		_

#### **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.



Home NHS Cat Online Ordering Supp	liers About Us Contact Us	Search NHS Supply Chain
Catalogue Requirement Demand Reports	Configuration Log out	Mrs Jane Peok <u>AJP123 - Hollows Respite Care Unit</u> [edit]
Welcome to EDC	MMD configuration	<u> </u>
MMD selection	External locations	Currently assigned roles

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.

IMD config	guration		Query Search		
Search res	ults			Showing all 5 results	
Page size 1	<b>0</b> <u>25 50 100</u>			Prev Page 1 Next	
MMD	Name	Depot	District		
JP123	Hollows Respite Care Unit	Test depot (933)	COUNTESS OF CHESTER NHS TRUST (10)	Edit	
IVIEW	Mountain View Respite Care Unit	Test depot (933)	COUNTESS OF CHESTER NHS TRUST (10)	Edit	
ESTYC	YC test depot	Test depot (933)	SUE RYDER CARE HOMES (YC)	Edit	
/ALE	Vale View	Test depot (933)	COUNTESS OF CHESTER NHS TRUST (10)	Edit	

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.



Search res	Showing all 5 results			
Page size	<b>10</b> <u>25</u> <u>50</u> <u>100</u>			Prev Page 1 Nex
MMD	Name	Depot	District	
AJP123	Hollows Respite Care Unit	Test depot (933)	COUNTESS OF CHESTER NHS TRUST (10)	Edit
IVIEW	Mountain View Respite Care Unit	Test depot (933)	COUNTESS OF CHESTER NHS TRUST (10)	Edit
ESTYC	YC test depot	Test depot (933)	SUE RYDER CARE HOMES (YC)	Edit
/ALE	Vale View	Test depot (933)	COUNTESS OF CHESTER NHS TRUST (10)	Edit
MALKER	Jordialex	Test depot (933)	SUE RYDER CARE HOMES (YC)	Edit
Page size	10 <u>25 50 100</u>			Prev Page 1 Nex

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.

View I										
MMD	details									
MMD s	short name	DISTMO								
MMD r	name	TRAINING MO1								
Depot District Active		Test depot (933)	Test depot (933) MEDICAL SUPPLIES IPT (MO)							
		MEDICAL SUPPLIES IPT (MO)								
		Yes	les							
Create	d by	SYSTEM on 16/03/2006 09:21:30	6							
MMD :	settings									
atalo	gue	Test depot MO (SYSTEM on 16/0	03/2006 09:14:55)							
Suppli	ier sort order	Name								
	ier sort order jured requisition points	Name								
Config		Name			Showing 21	- 30 of 38	resul			
Config Searc	jured requisition points	Name			Showing 21 <u>&lt;<prev< u=""> Page :</prev<></u>					
Config Searc	jured requisition points ch results	Name		Reg			Next >			
Config Searc Page :	jured requisition points ch results	Name	Replenishment type	Req Preferred delivery days	<pre>&lt;&lt; Prev Page</pre>		Next 3			
Config Searc Page :	jured requisition points :h results size 10 <u>25 50 100</u>		Replenishment type Manual		<u>&lt;&lt; Prev</u> Page Point	1234	<u>Next</u>			
Config Searc	ured requisition points th results size 10 <u>25 50 100</u> Req point	ELECTIVE ORTHO			<u>&lt;&lt; Prev</u> Page Point	1 2 3 4 Active	Next>			
Config Searc Page :	ured requisition points ch results size 10 <u>25 50 100</u> Req point <u>M00042 - GOLD L3 DP2 G21</u>	ELECTIVE ORTHO MA ORTHO	Manual	Preferred delivery days	<u>&lt;&lt; Prev</u> Page Point	1 2 3 4 Active Yes	Next > Fil Edi			
Config Searc Page :	ured requisition points ch results size 10 <u>25 50 100</u> Req point M00042 - GOLD L3 DP2 G21 M00043 - L2 DP2 G20 TRAU	ELECTIVE ORTHO MA ORTHO ST MANUAL	Manual Manual	Preferred delivery days	<u>&lt;&lt; Prev</u> Page Point	Active Yes Yes	Next > Fil Edi Edi			
Config Searc Page :	ured requisition points ch results size 10 <u>25 50 100</u> Req point <u>M00042 - GOLD L3 DP2 G21</u> <u>M00043 - L2 DP2 G20 TRAU</u> <u>M00051 - PW CUTOVER TE</u>	ELECTIVE ORTHO MA ORTHO ST MANUAL ST TOPUP	Manual Manual Manual	Preferred delivery days Tuesday Tuesday	<u>&lt;&lt; Prev</u> Page Point	Active Yes Yes Yes	Next > Fil Edi Edi			
Config Searc Page :	Iured requisition points th results size 10 <u>25 50 100</u> Req point M00042 - GOLD L3 DP2 G21 M00043 - L2 DP2 G20 TRAU M00061 - PW CUTOVER TES M00062 - PW CUTOVER TES	ELECTIVE ORTHO MA ORTHO ST MANUAL ST TOPUP	Manual Manual Manual Topup	Preferred delivery days Tuesday Tuesday Tuesday	<u>&lt;&lt; Prev</u> Page Point	Active Yes Yes Yes Yes Yes				



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

01 - CASTLE WARD [52] (GLN: 6785643256765)
o up 🗸 🗸
▼
▼
nded pricing V

#### 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.

nove	Req point	Replenishment type	Preferred delivery days	External location	Active	
	100001 - CASTLE WARD [52] (GLN: 6785643256765)	Торир	Monday, Tuesday, Wednesday, Thursday, Friday		Yes	Ec
	100002 - ABBEY WARD [41] (GLN: 4873829382710)	Manual	Monday, Tuesday, Wednesday, Thursday, Friday		Yes	E
	100005 - WEAVER WARD [47] (GLN: 8738294746374)	Automatic	Monday, Tuesday, Wednesday, Thursday, Friday	EL1	Yes	E
_	100007 - PALACE WARD [45] (GLN: 9483728394926)	Automatic	Monday, Tuesday, Wednesday, Thursday, Friday		Yes	E
☑)	100098 - SNOWFLAKE RESPITE CARE UNIT (GLN: 8392918273488)	Торир		AJP123a	Yes	E
	101001 - CATHEDRAL WARD [42] (GLN: 7238293847283)	Automatic	Monday, Tuesday, Wednesday, Thursday, Friday		Yes	E
	103025 - PRIORY WARD [34] (GLN: 4839203053928)	Automatic	Monday, Tuesday, Wednesday, Thursday, Friday		Yes	E
Page	e size 10 <u>25 50 100</u>			Prev	Page 1	Nex
					_	

- 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.



Select new MMD			
AJP125 - Teddy Bears Resp			
MVIEW - Mountain View Res		epot 10]	
VALE - Vale View [Test dep	ot 10]		
		-	

#### 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.

Home	NHS Cat Online	e Ordering Suppliers	About Us Contact Us	Search			NHS Supply Chain
a		-]_					Mrs Alison Pe
Catalogue	Requirement De	mand Stock Repor	ts Configuration Admin Lo	g out			AJP123 - Hollows Respite Care Unit [et
Catalog	ue Supplie	erid		• 0	иегу		Product type Local  Search
Search	results						Showing all 2 results
Page size	≥ 10 <u>25 50 100</u>						Prev Page 1 Next
NPC	MPC	Brand	GTIN	EClass	Product type	Unit of issue	Supplier
000619	12345-09876 RUSH COMB CHN MS	Movitie TR 2 0-4, 2MM - JB Base	12345678901234 Desc 2 JB Sec Desc 2	МКВ	Local	Box of 50	CONMED ENDOSURGERY UK
000619 BR			222 222 22 22 22 22 22 22 22 22 22 22 2	ADG	Local	Each	MEDISTOX LTD
0980	mpc123 D CAST SANDAL XXX	mr whippy (S line 2	12345678901234	ADG			
<u>0980</u> 0980 PAEC		Discourse and the second	12345678901234	ADG			Prev Page 1 Next

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	Γ					
eClass	5	Select eClass			~	
Brand	Г					
GTIN	Γ					
Unit of issue	5	Select unit of issue 🗸				
Units	1					
Supplier	5	Select supplier 🗸 🗸	] 🛎			
VAT rate	Z	Zero rated 🗸 🗸				
Contract reference						
Expense code						
Ad-hoc product	C					
Manufacturers code						
Lead time	2					
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	Replicat <u>e e</u>	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.

	pe to find a product			
ADB19				( All 🔻 )
ADB192 - Biscuit Standard I	Milk chocolate digestives 2 t	biscuit pack Case of 4	48	$\smile$
ADB193 - Biscuit Standard H	Hob Nobs 2 Biscuit Pack Ca	ase of 48		
ADB198 - Shortbread All bu	tter 30g			
ADB199 - Cookies Ginger si	nap 30g			

Details of the selected product are displayed.


Stock product de	tails
NPC	ADB192
MPC	38957
Full description	Biscuit Standard Milk chocolate digestives 2 biscuit pack Case of 48
EClass	ADA - Biscuits
Unit of issue	Each
GTIN	12345678901231
Brand	McVities
Lead time	Standard lead time
Supplier name	UNITED BISCUITS LIMITED
Price details (Incl	luding VAT at 20%)

- 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.

Home	NHS Cat	Online Ordering	Suppliers	About Us Contact Us	Search			NHS Sup	ply Chain	Nł	IS
×									16		
Catalogue	Requiremen	t Demand Sto	ock Reports	Configuration Admin	Log out			AJ	P123 - Hollows F		Alison Peck re Unit [edit]
Catalo	gue	SupplierId			▼ (	Query		Produ	ct type Loc:	al 🔻	Search
Searc	h results								Show	ing all 2	results
Page s	ize 10 <u>25</u> <u>50</u>	<u>100</u>							Pre	v Page	1 Next
NPC	MPC	Brand		GTIN	EClass	Product type	Unit of issue	Supplier			
<u>000619</u> 000619	12345-09 BRUSH COMB (	876 Movitie CHN MSTR 2 0-4, 2M	M - JB Base De	123456789D1234 sc 2 JB Sec Desc 2	MKB	Local	Box of 50	CONMED ENDOSU	RGERY UK		
<u>0980</u> 0980 PA	mpo ED CAST SAND	AL XXX S line 2	,	12345678901234	ADG	Local	Each	MEDISTOX LTD			
Page s	ize 10 <u>25</u> <u>50</u>	<u>100</u>							Pre	v Page	1 Next
Add	new product			-		_					

- 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.

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

alogue Requirement Demand Reports	Configuration Admin Log out	AJP123 - Hollows Respite Care U
iport	2	1 Export
lect local catalogue import spreadsheet: Browse		3   All supplier:     4   Download current catalo
510100		

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.

The following new suppliers will be created PAP123 - Paper R Us Confirm you wish to update the live catalogue for AJP123 - Hollows Respite Care Unit		Update	Cancel
	Confirm you wish to update the live catalogue for A	JP123 - Hollows Res	pite Care Uni
The following new suppliers will be created	PAP123 - Paper R Us		
	The following new suppliers will be created		

### 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.



Choose supplier:
All suppliers V Download current catalog

3 Save or open the spreadsheet.

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

	Х	Y	Z	AA	AB	AC
1			NHS	S Suppl	y Chain	
2						
2 3						
4						
5						
6						
7	Band 4 price	Band 5 qty	Band 5 price	E class	Ad hoc	
8	0.00	0	0.00	ABC	No	
9	0.00	0	0.00	ABC	No	Invalid Band 1 qty
10	0.00	0	0.00	ABC	No	
11	2.13	320	2.05	WPC	No	
						Missing Product code
						Missing Band 1 price
						Unexpected error in additional validation for NPC (Procedure or function 'EDC_fnInLocalCatalogue' expects
12						parameter '@NPC', which was not supplied.)
12 13						
12 13 14						
12 13 14 15						
12 13 14 15 16						
15 16 17						
15 16 17						
15 16 17						
15 16 17						
15 16 17						
12 13 14 15 16 17 18 19 20 21 20 21 22 23						

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.



Edit product 'PRODUCT1:	 23'
Product details	
Product code	PRODUCT123
Base description	French stick
Secondary description	
eClass	Select eClass
Brand	
GTIN	
Unit of issue	Each V
Units	
Supplier	Select supplier 🗸
VAT rate	Zero rated V
Castre to Castre	

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

Supplier details		
Supplier name	Supplier123	
Supplier reference	My new supplier	
GLN		
Address	$\bigcirc$	
Post code		
Contact name		
Contact email address		
Telephone number		
Fax number		

#### 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.

Edit external location 'GENM	ED'
External location details	
External Location	GENMED
Feed category	Purchase order v
FTP Server Protocol	SFTP ~
IP Address	123.123.123.123
Port Number	22
Depot	Test depot
District	MO/TST MEDICAL SUPPLIES IPT
Feed type	Standard ~
Include NHS Supply Chain sales order number	
Username	genmed
Password	
Filename	GENMED[batch][dd][MM][yy]
Batch transmission	
Transmission hour	00 ~ 00 ~
Active	
Back to location list	Save

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.

External location 'AJP	123a' created successfully		
External location details			
External Location	AJP123a	FTP Protocol	FTP
IP Address	123.123.123.123	Port Number	21
Username	ftp-user	Password	
Feed category	Purchase order	Feed type	Standard
Filename	[yyyy]-[MM]-[dd]-[batch]	Batch transmission	Yes
Transmission time	01:15	Created	apedk on 18/08/2015 13:34:59
Active	Yes		

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.

Add a new external locat	ion
External location details	
External Location	AJP123b
Feed category	Gold transactions
FTP Server Protocol	FTP •
IP Address	123.123.123.124
Port Number	21
Depot	Test depot
District	10/TST COUNTESS OF CHESTER NHS TRUST
PLIC feed type	Gold transactions 👻
Date range	01/07/2015 to 31/07/2015
Username	ftp-user
Password	•••••
Confirm password	•••••
Filename	[yyyy]-[MM]-[batch]
Active	
Back to location list	Save

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.

	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~ <u>~</u> ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~_~	$\sim$	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~		
External lo	External locations within MMD 'AJP123'							
	Exernal foodations within him by full 120							
Location	Feed type	FTP Protocol	Transmission time	Created	Active			
EL1	CSV full	FTP		PECKA on 27/02/2013 13:18:40	Yes <u>Edi</u>	4		
Add new	Add new external location							
			~~~~~			ma		

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.

Requirement summary	Requirement Filter Product	$\sim$	Display all 🗌 Filter
Showing 6 requisition point summaries			
Requisition point		Replenishment type	Summary
100001 - CASTLE WARD [52] (GLN: 6785643256765)		Торир	4 records in total 4 stock products
100002 - ABBEY WARD [41] (GLN: 4873829382710)		Manual	<u>1 record in total</u> <u>1 stock product</u>
100007 - PALACE WARD [45] (GLN: 9483728394928)		Automatic	<u>1 record in total</u> <u>1 stock product</u>

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.

Requirement summary	Requirement Filter Product	~	Display all 🗹 Filter
Showing 7 requisition point summaries			
Requisition point		Replenishment type	ummary
100001 - CASTLE WARD [52] (GLN: 6785643256765)		Торир	4 records in total 4 stock products
100002 - ABBEY WARD [41] (GLN: 4873829382710)		Manual	<u>1 record in total</u> <u>1 stock product</u>
100005 - WEAVER WARD [47] (GLN: 8738294748374) Create requirement		Automatic	

The currently applied filter is shown at the top left of the page. Click **Show all** to view all requisition points and summary links.

Requirement summary	Requirement Filter Missing product	Display all 🗌 Filter
Showing 2 requisition point summaries Filtered by missing products		
Requisition point	Replenishment type	Summary
101001 - CATHEDRAL WARD [42] (GLN: 7238293847283)	Automatic	<u>1 record found</u>
103025 - PRIORY WARD [34] (GLN: 4839203053928)	Automatic	1 record found

# 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.



ľ	· · · · · · · · · · · · · · · · · · ·	Conner Co	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		a warden ward
	100005 - WEAVER WARD [47] (GLN:	8738294746374)		Automatic	
	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.

100001 - CASTLE WARD [52] (GLN: 6785643256765) Topup 4 records in total	-	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		 ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	
		100001 - CASTLE WARD [52] (GL	N: 6785643256765)	Торир 🕳	4 records in total 4 stock products

Click **New requirement** at the bottom of the list of existing requirements.

hard warden and the second of the second sec		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Requirement authorisation		Requirement Filter	Product V	Filter
Displaying 4 lines of 4		[ Topup, Preferred delivery	100001 - CASTLE WARD [52] (GLN: ( y day: Monday, Tuesday, Wednesday, Th	
in the second			Show	ring all 4 results
Page size 10 25 50 100			Pre	v Page 1 Next
NPC Requirement type	Scaling factor Reorder level R	Reorder quantity Bin full quantity Group key	Last changed	Authorised
AAR033 Stock (GTIN: 5017726170226)	1 1	- 0	Mrs Alison Peck on 05/07/2016 11:4	4:33
Cold Prverages Carb 330m	LC-Sovita Zero, 220ml can		and the second and the second	~~~~~
AAA				~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Page size 10 25 50 100			Pre	v Page 1 Next
Back Delete Selected	Delete all 4 New require	ment		Save changes
				and a second second

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.

	1000 [ Topup, Preferred delivery day: Mo	001 - CASTLE WARD [52] (GLN: 6785643256765)
	(·····································	
Search for a product		Ali 🗸
Product details		

- 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.

	[ Topup, Prefe	- 100001 - ( erred delivery day: Monday	CASTLE WARD [52] (GLN v, Tuesday, Wednesday, T	
AR				All
AR288 - Cold Beverages Juice Drinks PET Bottle Blackcurrant 500ml - PE	T bottle			
AR302 - Cold Beverages Juice Drinks PET Bottle Blackcurrant Light 500m	nl - PET bottle			^
AR306 - Cold Beverages Carbonated 330ml Can Coke zero sugar 330ml				_
AR307 - Cold Beverages Water Natural Still 10 litre - Box				*
AR325 - Cold Beverages Energy Drinks Lucozade Sport 500ml Raspberry	- PET bottle			
AR326 - Cold Beverages Water Natural Still 330ml - PET bottle				
AR327 - Cold Beverages Water Natural Carbonated 330ml - PET bottle				
AR339 - Cold Beverages Juice Drinks PET Bottle Orange low sugar 275m	l			
AR340 - Cold Beverages Juice Drinks PET Bottle Apple & Blackcurrant lov	w sugar 275ml			$\sim$
AR348 - Cold Beverages Energy Drinks Lucozade Sport Lite 500ml Lemo	n & Lime - PET bottle			
rice details				
Band 1	Band 2	Band 3	Band 4	Bar

- 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.

	[Тори	10 p, Preferred delivery day: N	0001 - CASTLE WARD [52] (GLI Ionday, Tuesday, Wednesday,	N: 6785643256765 Thursday, Friday
es Carbonated PET Bottle Coca cola	500ml			All 🗸
AAR157 In stock	M	PC	D003584	
Cold Beverages Carbonated PET Bo 500ml	ttle Coca cola EC	Class	AAD - Carbonated drinks	
Case of 24	GT	FIN	5017726109431	
Coca Cola	Le	ad time	Standard lead time	
COCA-COLA ENTERPRISES LTD				
/AT at 20%)				
Band 1	Band 2	Band 3	Band 4	Band 5
1	3	0	0	(
16.06	15.37	0.00	0.00	0.00
Value	Scaled valu	ie -		
		Bin full q	uantity	0
0	0.0	00 Group ke	y	
	0.0	00 Authorise	d	V
0	0.0	00 Internal		
	ARR157 In stock Cold Beverages Carbonsted PET Bo Cold Beverages Carbonsted PET Bo Coca Cola Coca Cola COCA-COLA ENTERPRISES LTD AT at 20%) Band 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	AAR157 in stock M AAR157 in stock M Cold Beverages Carbonated PET Bottle Coca cola S000m Case of 24 G Coca Cola LE Coca-CoLA ENTERPRISES LTD AT at 20%) Band 1 Band 2 AT at 20%) Value Scaled value Coca Cola Cola Cola Cola Cola Cola Cola Col	AAR157 in stock MPC Coid Beverages Carbonated PET Bottle Coca cola South Cose of 24 Coca Cola Coca-CoLA ENTERPRISES LTD AT at 20%) Band 1 Band 2 Band 3 Coca-CoLA ENTERPRISES LTD AT at 20% Value Coca-CoLA ENTERPRISES LTD Coca-CoLA ENTERPRISES LTD Coca-CoLA ENTERPRISES LTD Band 1 Band 2 Band 3 Coca-CoLA ENTERPRISES LTD Coca-COLA E	AAR157         in stock         MPC         D003584           Cold Beverages Carbonated PET Bottle Coca cola         EClass         AAD - Carbonated dimixs           Case of 24         GTIN         5017720100431           Coca Cola         Lead time         Standard lead time           COCA-COLA ENTERPRISES LTD         Standard lead time           AT at 20%)         Band 1         Band 2         Band 3         Band 4           1         3         0         0         0           16.06         15.37         0.00         0.00         0           Value         Scaled value           Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2"           Value         Scaled value         Image: Colspan="2">Colspan="2"           Image: Colspan="2">Colspan="2"           Image: Colspan="2"         Image: Colspan="2"         Image: C

- 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.



Reorder quantity	10	10.00	Authorised	
Maximum stock level	12	12.00	Internal	
Supplier	Select supplier			
Back to summary				Save changes
	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		·····	

b Complete details for the internal supplier.

Edit supplier 'Bank of Zao		
Supplier details		
Supplier name	Bank of Zaonce	
Supplier reference	BoZ	
GLN		
Address		
Post code		
Contact name	Joe Bloggs	
Contact Email	joe.bloggs@boz.com	
Email Internal Demands		
Telephone number	08001234123	
Fax number		

- 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.







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.

Requirement summary	Requirement Filter Stock	Display all Filter
Showing 6 requisition point summaries Filtered by stock requirements Show all		
Requisition point	Replenishment type	Summary
100001 - CASTLE WARD [52] (GLN: 6785643256765)	Торир	4 records found
100002 - ABBEY WARD [41] (GLN: 4873920082710)	Manual	1-record found

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.

Requirement authorisation			and the second s		Requirement Filter Stock	✓ Filt	er		
Displaying 4 lines of 4 Filtered by stock requirements Show all				[Topup, Preferred delivery da	100001 - CASTLE WARD [52] (ay: Monday, Tuesday, Wednesd				
						Showing all 4 resu	ilts		
Page size 10 25 50 100						Prev Page 1 Ne	ext		
_									
NPC Requirement type	Scaling factor	Reorder level	Reorder quantity	Bin full quantity Group key	Last changed	Author	ised		
AAR033 Stock (GTIN: 5017726170226)	1	1	-	0	Mrs Alison Peck on 05/07/20	016 11:44:33	V		
Cold Beverages Carbonated 330m	I Can Sprite Zero	330ml can							
		·····	~		- marken - Marken				
Dysphagia drink Slo lemon 2. Flav	Dysphagia drink Slo lemon 2. Flavoured instant cold drink for dysphagia patients on stage 2 (custard) fluids 25 cups								
Page size 10 25 50 100						Prev Page 1 Ne	ext		
Back Delete Selected	Delete all 4	New requi	rement			Save changes	5		

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



bisplaying 2 lines of 2 iltered by local requirements show all			ſ	Topup, Preferred delivery o	100001 - CASTLE WARD [52 ay: Monday, Tuesday, Wedne		iy, Friday
Page size 10 <u>25 50 100</u>						Prev Pag	g e 1 Nex
NPC Requirement type	Scaling factor	Reorder level	Reorder quantity	Bin full quantity Group key	Last changed		Authoris
PRODUCT123 External (GTIN: 58521475698549) French stick	1	10	-	100	Mrs Alison Peck on 05/02/	2018 12:20:21	
PRODUCT456 Internal (GTIN: 12345678912343) Chelsea buns	1	10	-	0	Mrs Alison Peck on 05/02/	2018 12:25:16	
Page size 10 <u>25 50 100</u>						Prev Pag	ge 1 Ne:

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**.



Requirement a	authorisation				Requirement Filter	Product	~		Filter
Displaying 10 I	ines of 11			(T	opup, Preferred delivery		- CASTLE WARD [52] (0 ay, Tuesday, Wednesda		
							Showi	ng 1 - 10 of	11 result
Page size 10 2	<u>5 50 100</u>						Pre	ev Page 1	<u>2</u> <u>Next</u> ≥
<u>NPC</u>	Requirement type	Scaling factor Re	order level R	Reorder quantity	Bin full quantity Group key	L	Last changed		Authoris
AAR033 (GTIN: 5017726	Stock S170226)	1 - Sonite Zero, Showy	1	-			Mrs Alison Peck on 05/07/2	2016 11:44:33	
PRODUCT123 (GTIN: 5852147 French stick		⁻	10	-	100		Mrs Alison Peck on 05/02/2	2018 12:20:21	~~~~
Page size 10 2	<u>5 50 100</u>						Pre	ev Page 1	<u>2</u> <u>Next</u> ≥
Back Del	lete Selected	elete all 11	ew requirem	ont				Save	

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.

Message fr	rom webpage
?	Are you sure you want to delete ALL records shown by the filter, not just those on the page?
	OK Cancel

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.



isplaying 10	lines of 11				opup Droforrod dolivor	100001 - CASTLE W y day: Monday, Tuesday	ARD [52] (GLN: 67856	
					opup, Preferred deliver	y uay. monuay, ruesuay		
							Showing 1 - 10 of	11 result
Page size 10 2	<u>5 50 100</u>						Prev Page 1	<u>2</u> <u>Next</u> ≥
-								
NPC	Requirement type	Scaling factor	Reorder level	Reorder quantity	Bin full quantity Group ke	y Last change	<u>d</u>	Authoris
AAR033	Stock	1	1		0	Mrs Alison P	eck on 05/07/2016 11:44:33	
GTIN: 501772	6170226)							
Cold Beverage	es Carbonated 330ml Ca	an Sprite Zero 330m	il can					
AAR250	Stock	1	1	-	0	Mrs Alison Pe	eck on 05/02/2018 12:30:39	
Cold Beverage	es Water Natural Carbor	nated 1.5 litre - PET	bottle					
lassa_	man	m				~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	m hour hear	
Barratric Dyna	mic Matthess Mentor b	ariatric mattress		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~_~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
KBD1046	Stock	1	5	-	0	Mrs Alison P	eck on 05/02/2018 12:34:36	
Filter set Safe	Cone Plus Filter Set 50	00ul						
PRODUCT123	External	1	10	-	100	Mrs Alison P	eck on 05/02/2018 12:20:21	
(GTIN: 585214	75698549)							
French stick								
Page size 10 2	<u>5 50 100</u>						Prev Page 1	<u>2</u> <u>Next≥</u>

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.

Г			
	101001 - CATHEDRAL WARD [42] (GLN: 7238293847283)	Automatic	2 records in total
			1 stock product
		\rightarrow	1 missing product
L	- man and a second a	when when a second	

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.

Existing products		
Search for a product		All 👻
Quick add	AAR033 AAR302	
xisting products		

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

Requirement global ed	it			0	
Existing products					
Search for a product				All	~
luick add					
xisting products	 (AAR033) Cold Beverages Carbonated 330n (AAR302) Cold Beverages Carbonated 330n 				
Stock product details					
NPC	AAR033	MPC	F7663		
Full description	Cold Beverages Carbonated 330ml Can Sprite Zero 330ml can	EClass	AAD - Carbonated drinks		
Unit of issue	Case of 24	GTIN	5017726170226		
Brand	Sprite	Lead time	Standard lead time		
Supplier name	COCA-COLA ENTERPRISES LTD				
Replacement product					
Search for a product				All	~
Requisition points					
100098 - SNOWFLAKE	RD [52] (GLN: 6785643256765) E RESPITE CARE UNIT (GLN: 8392918273488) RD [34] (GLN: 4839203053928)				
			Cancel Dry ru	in Aj	
					~



- 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.

and the second	
All	~
AR033 Cold Beverages Carbonated 330ml Can Sprite Zero 330ml can	

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.

Ē	Xpense Code Adhoc product
	reate requirement as internal
C	upplier Select supplier V If you select a supplier the requirements for this product will be created as being internally sourced
R	equisition points
	100001 - CASTLE WARD [52] (GLN: 6785643256765)
	100007 - PALACE WARD [45] (GLN: 9483728394926) 100098 - SNOWFLAKE RESPITE CARE UNIT (GLN: 8392918273488)
	103025 - PRIORY WARD [34] (GLN: 4839203053928)
	Cancel Dry run Apply
	many and the second

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.

Successfully changed 3 of 3 requirements						
Blobal update results: updating requirement for products AAR033 (Stock) to PROD	UCT789 (Lo	cal)				
eqpoint				Result	Message	
00001 - CASTLE WARD [52] (GLN: 6785643256765)				ок		
00098 - SNOWFLAKE RESPITE CARE UNIT (GLN: 8392918273488)				ок		
3025 - PRIORY WARD [34] (GLN: 4839203053928)				ок		
guirement global edit	~~~~~~	and the second second		munn	,^,~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~
equirement global edit	~~~~	and the second second		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		
Successfully changed 1 of 2 requirements, 1 failed.		cal)	~~~,	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		
Successfully changed 1 of 2 requirements, 1 failed.	UCT789 (Lo Result	Cal) Message		~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	
equirement global edit Successfully changed 1 of 2 requirements, 1 failed. Iobal update results: updating requirement for products AAR033 (Stock) to PROD repoint 0002 - ABBEY WARD [41] (GLN: 4873829382710)						×~~~~~

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.

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

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.

Demuisement global delete

- 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.

Requirement global delete							
Product							
AAR033 - Cold Beverages Car	bonated 330ml Can Sprit	e Zero 330ml can			× All V		
Stock product details							
NPC	AAR033		MPC	F7663			
Full description	Cold Beverages Carbonated 3 330ml can	330ml Can Sprite Zero	EClass	AAD - Carbonated drinks	AAD - Carbonated drinks		
Unit of issue	Case of 24		GTIN	5017726170226	5017726170226		
Brand	Sprite		Lead time	Standard lead time			
Supplier name	COCA-COLA ENTERPRISES	LTD					
Price details (Including VAT at	20%)						
	Band 1	Band 2	Band 3	Band 4	Band 5		
Quantity	1	:	3 0	0	0		
Price	10.05	9.6	1 0.00	0.00	0.00		
Requisition points							
100001 - CASTLE WARD [52 100007 - PALACE WARD [45] (GLN: 6785643256765)] (GLN: 9483728394926)						
					Cancel Delete		



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

Successfully deleted 2 of	2 requirements					8
Product						
AR033 - Cold Beverages	Carbonated 330ml Can Spri	te Zero 330ml can				Stock 🗸
Stock product details						
IPC	AAR033		MPC		F7663	
Full description	Cold Beverages Carbonated 330ml can	330ml Can Sprite Zero	EClass		AAD - Carbonated drinks	
Unit of issue	Case of 24		GTIN		5017726170226	
Brand	Sprite		Lead time		Standard lead time	
Supplier name	COCA-COLA ENTERPRISES	S LTD				
Price details (Including VAT	ī at 20%)					
	Band 1	Band 2	2	Band 3	Band 4	Band 5
Quantity	1		3	0	0	
Price	10.05	9.6	51	0.00	0.00	0.0
Global update results: delet	ting requirement for AAR033	(Stock)				
leqpoint			Result	Message		
			ок	Requirem	ent deleted	
00001 - CASTLE WARD [52]			ок		ent 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.



		~~~~~	-				in a state		100000	Sile-			
Catalogue	Requirement	Demand	Stock	Reports	Configuration	Admin	Log out				AJP1	123 - Hollows Re	Mrs Alison Peck espite Care Unit [edit]
Import						ł							
		Se	lect req	point / GLN	100001 - 0	CASTLE	WARD [5	2] (GLN: 678564	3256765)		~ <	2	
Import											Export		
Requiremen	nt imports:								3-		Download r	req point stocl	k requirements
		Brow	/se						-				
Stock defini	ition imports:										Downlo	ad store stock	definitions
		Brow	/se										
Barcode im	ports:										D	ownload barc	odes
		Brow	/se										
Impor	t data (Dene	nding on fil	e sizes	this may ta	ke some time)								
Impor	Осре	inania on n	0 0.203,	and may ta	ne some time;								
	_				-			-		-			

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

							Tona a			E	911	2.4
Catalogue	Requirement	Demand	Stock	Reports	Configuration	Admin	Log out		AJP123 - Hollows Res	spite Care Unit [e		Alison Peck <u>d - (Castle)</u>
Import											)	
		s	elect req	point / GL	N 100001 - 0	CASTLE	WARD [52	?] (GLN: 6785643256765)	)	-		
Import		<b>```</b>							Export			
Requirement	nt imports:		~~~~	Lunn				and the second second	Dowr	nload req point		ments

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

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

	А	В	С	D	E	F	G	Н	1	J	K	L	
1	Stock re	quirement	s								NHS Su	upply Chain	
2													
3													
4													
5													
6													
7	Action	UID	NPC	Product type	Internal	<b>Reorder level</b>	Reorder quantity	Bin full quantity	Scaling factor	Group key	Supplier ID	Authorised	
8	Example	9999999	APO001	Local	Yes	1		1	1	EXAMPLE	12345	Yes	
9	Example	9999999	APO002	Stock	No	1		0	1	EXAMPLE		No	
10	Amend	10399767	AAR033	Stock	No	1		0	1			Yes	
11	Amend	10399871	AAR302	Stock	No	2		10	1			Yes	
12	Amend	10415436	AAR315	Stock	No	3		0	1			Yes	
13	Amend	10399868	ABX014	Stock	No	1		0	1			Yes	
14	Amend	10400155	ABX289	Stock	No	1		0	1			Yes	
15													
16													
17													
18													
10	(FH St	ock require	monte 1	2									

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.

Сог	irm action	
Con	rm you wish to update live stock management data	
	Update Cancel	

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.

Information				
Import complete				
	Updated	Inserted	Deleted	Errors
Requirements:	8	-	-	2
Download spread	dsheets wi	th errors f	or details.	
				ок

If there are any errors, click **OK** to acknowledge the message and then download the appropriate spreadsheet containing error information.

Import		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Select req point / GLN	100001 - CASTLE WARD [52] (GLN: 6785643256765)	~
Import		Export
Requirement imports:		Download req point stock requirements
Browse		bonnoud req point otoer requirements
Stock definition imports:		Download store stock definitions
Browse		
Barcode imports:		Download barcodes
Browse		
Import data (Depending on file sizes, this may take	e some time)	
Completed		
Requirement		
	Complete	
Amended:8 Added:0 Deleted:0 Errors: 2	Skipped:0	
Download requirement spreadsheet with errors		

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.

	А	В	С	D	E	F	G	Н	I. I.	J	К	L		-
1	Stock re	equirement	ts								NHS Su	upply Chain		
2														
3														
4														
5														
6														=
7	Action	UID	NPC	Product type	Internal	<b>Reorder level</b>	Reorder quantity	<b>Bin full quantity</b>	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														
13														
14														
15														
14 15 16														-
17	► H S	tock require	ments 1	2			1		Ĩ	4				



# 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.

Site	
ame	HRC-04
ull name	Hollows - Juniper Lane site
GLN	
Active	
	Save

- 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.

Name	Flurry	Requisition point	
Full name	Snowflake Goods In	100098 - SNOWFLAKE RES	PITE CARE UNIT (GLN: 8392918273488)
Bin mask			
Shelf life receipt warning (days)	30	Active	
Shelf life warning (days)	30	Stock tracking	
Receipt lead time (days)	5	Enable bins	
Default putaway mode	Receipt and put away	Enable GTINs	
Location stock management		Enable RFID	
		Enable metrics	
			Location management Sav

- 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 (③) 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.

Edit store		
Location name	Is default primary?	
Castle Ward	0	Remove
Castle Catering Store	Make primary	Remove
Shared Castle Store	Make primary	Remove
Add new location Castle Ward	0	Done

 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 (②).

- 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.

Department	
Name	HRC-OT1
Full name	Hollows - Occ Therapy
GLN	
Active	
	Save

- 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.

Client	
Name	SmithP
Full name	Peter Smith
GLN	
Patient ID	1234567891
Active	

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.



lion	
HRC-01 - Hollows - Manor Farm site	~
Castle - Castle Ward	
Priory - Priory Ward	
	HRC-01 - Hollows - Manor Farm site Castle - Castle Ward

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.

tock def	iniuona		Supplier		Select supplier	► NPC/GTIN	Show inactive Filter
Search re	sults						Showing all 7 result
Page size	10 <u>25 50 100</u>						Prev Page 1 Nex
PC	GTIN	MPC	Product type	Active	Base description	Secondary description	
AR302	5054267402348	03727	Stock	✓	Cold Beverages Juice Drinks PET Bottle	Blackourrant Light 500ml - PET bottle	
AR315	5054267401983	01893	Stock	<b>.</b>	Cold Beverages Cordials	Blackcurrant Light 600ml	
RODUCTI2	3 58521475698549		Local	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	French stick		
RODUCT45	12345678912343	1	Local	$\checkmark$	Chelsea buns		
Page size	10 <u>25 50 100</u>						Prev Page 1 Nex
Back	Add stock det	finition					Export

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).



Search requirements	A <b>4</b>	All
Stock Definition	AAR061 - Cold beverages - cordials Lemon 5 litre	
	AAR306 - Cold beverages - carbonated 330ml can Coke Zero 330ml can	
PC	AAR928 - Cold beverages - carbonated 330ml can Lilt zero 330ml can	
Description	ABB018 - Baby meal savoury from 7 months Yummy harvest chicken 200g jar	
Description	ABB038 - Baby breakfast Creamed porridge 128g can	

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.

earch requirements	AAR033 - Cold beverages - carb	oonated 330ml can Sprite diet 330ml (12floz	) can All 👻
Stock Definition			
IPC	AAR033	Product type	Stock
Description	Cold beverages - carbonated 330ml can		
Secondary description	Sprite diet 330ml (12floz) can		
Receipt UOM	Case	Receipt UOM quantity	24
ssue UOM	Each 👻	Minimum stock quantity	
Group key		Active	
nable consignment		Consignment stock level	
Auto process		Enable batch tracking	
nable serial no. tracking		Enable expiry date tracking	

- 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.

Create stock definition	and the second		
Search requirements	ferers on stage 2 (custard) fluids. it is supplied	d in a beige cup containing a black	currant flavouring and thickener. All
Stock Definition			
NPC	ABX014	Product type	Stock
Description	Dysphagia drink		
Secondary description	Just add water - pre-thickened cold drink for dysphagia so and thickener.	ufferers on stage 2 (custard) fluids. it is supp	plied in a beige cup containing a blackcurrant flavouring
Receipt UOM	Case	Receipt UOM quantity	50
Issue UOM	Each	Minimum stock quantity	100
Group key		Active	
Enable consignment		Consignment stock level	
Auto process		Enable batch tracking	
Enable serial no. tracking		Enable expiry date tracking	
			Cancel Save changes

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.



Receipt shelf life warning (days)	10	Shelf life warning (days)	10
()-)	Leave blank to use default store values	s (30)	Leave blank to use default store values
Locations	Location name		Is primary?
	Castle Ward		0
	Add new location Shared Castle Store Shared Castle Store Castle Catering Store		
		2	Cancel Save changes

- 2 Click the Add button (③) to its right.
- 3 If appropriate, click **Make primary** to make this the primary location for this product.

days)		
	Leave blank to use default store values (30)	Leave blank to use default store values (
ocations	Location name	Is primary?
	Castle Ward	©
	Shared Castle Store	Make primary Remove
	Add new location Castle Catering Store	
		Cancel Save changes

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.

PRODUCT123	58521475698549	^_Local	French stick			<u></u>	~~~~~~
PRODUCT456	12345678912343	Local 🗸	Chelsea buns				
Page size 10	0 <u>25 50 100</u>					Prev Page 1	Next
Back	Add stock definition				-	Ex	port
				man man	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		

#### 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.

nport		
nport		Exp
	Select req point / GLN 100102 - THEATRE STORES	~
tequirement imports: Choose File No file chosen		Download req point stock requirements
tock definition imports: Choose File No file chosen	This only applies to the Active Store (As selected on the front screen)	Download store stock definitions
arcode imports: Choose File No file chosen	The following options are only available to internal NHS Supply Chain users	Download barcodes
Import data (Depending on file siz	es, this may take some time)	

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.

	А	В	С	D	E	F	G	Н	I.
1	Stock de	efinitions							
2									
3									
4									
5									
6						* Auto process can only be s	et for consignme	nt stock *	
7	Action	UID	NPC	Product type	Consignment tracked	Consignment stock level	Auto process	Enable batch tracking	Enable serial no. tracking
8	Example	9999999	APO001	Stock	Yes	3	Yes	Yes	Yes
9	Example	9999999	APO002	Local	No		No	Yes	Yes
10	Amend	1980979	AAR315	Stock	No		No	No	No
11	Amend	2288286	AAR302	Stock	No		No	Yes	Yes
12	Amend	2588591	HHH023	Stock	Yes		No	No	No
13	Amend	2588592	HHH050	Stock	Yes		No	No	No
14	Amend	19172184	ABX014	Stock	Yes	5	Yes	No	No
15									
16									
17									
H 4	► N S	tock definiti	ons 1 🦯	2				III	•



	I.	J	К	L	М	N	0	Р	
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		/ <del>*</del>							Ŧ
14 4	Stock definitions 1	2		[ ◀				►	

#### 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.

Confirm action
Confirm you wish to update live stock management data.
Update Cancel

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.

Information				
Import complete				
	Updated	Inserted	Deleted	Errors
Stock definitions:	4	-	-	3
Download spreads	neets with	errors for	details.	
				ок

- 6 Click **OK** to acknowledge the message.
- 7 Click Download stock definition spreadsheet with errors and either save or open it.



	Select req point / GLN	100001 - CASTLE WARD [52] (GLN: 6785643256765)	$\sim$
Import			Export
Requirement imports:			Download req point stock requirements
	Browse		boundared point stock requirements
Stock definition imports:			Download store stock definitions
	Browse		
Percede imports:			
Barcode imports:	Browse		Download barcodes
	Browse	e some time)	Download barcodes
		e some time)	Download barcodes
Import data (Deper		e some time)	Download barcodes
Import data (Deper Completed Stock definition		Complete	Download barcodes

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

Only lines with errors are downloaded.

	I. I.	J	K	L	М	N	0	
1					NHS Suppl	/ Chain		
2								
3								
4								
5								
6						n only be set for consignmen		
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	Yes	Yes	2	2	2 Case		Yes	Invalid Consignment stock level
11	No	No	2		Pack		Yes	Invalid Consignment stock level
12	No	No	2	3	Box	50	Yes	Invalid Consignment stock level
13								3
20	harden and the second							La company and the second seco

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.

Sign Out 🛒 0 items £0.00 New order My orders   Financial coding Admin Quick links   My details	
Req point maintenance	
Create new red point	fuc
Your requisition point: 100001 CASTLE WARD [52] (GLN: 6785643256765) [change] Your User maintenance	)
Create new user	
Home Savings News Product news Clinical and Consumables Capital S User/role report	ion
ONLINE CATALOGUE NHS Cat Medical Non-Medical NCP	
Home	

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.

User info Roles Trusts Requisition points				
Logistics administrator Masking NIS catalogue No financial limit	*	> >AII>	Authorisation email recipient Authorise and send orders Mask override Requisitioner	
Password never expires Quick order Requisition point maintenance	Ш	<		
Restricted session	-	<all<< td=""><td></td><td></td></all<<>		

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.

Q 🖬 🖉		•	06:53
≡ но	me		:
Select MMD			
	ISTMO (MO)	933)	•
Select Store	BULK		·
Receipt	Put Away	Stock Check	() Issues
View	Piek	Write Off	Write Back
Return to Stock	Return to Supplier	Transfer	Comms
$\triangleleft$	(	)	

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.

Send MMD Data		=	Requisitio	on Data
Restore Requisition Data			MMD	_
Clear Requisition Data			DISTMO (M	10 933)
oren riedenmen nare			sition Point/GLN	
Copy Requisition Data			F1231J	
			CAL CENTRE, RAF	SEALAND (Manual)
Paste Requisition Data		NPC		Order qty
Show only Req Points with	Data 🔲		e or Scan NPC	Quantity
Auto Advance		No. 1	NPC (1) GGGG	Order qty 🗘
Allow Auto Full screen				
Allow spaces in NPC				
View Requirement	0			
View Data	۲			

Tap Options at the top-right of the screen and select Show only requpts 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.

- 51	0 4	9:32 :
=	Send MMD Data	
C	Restore Requisition Data	
Regula	Clear Requisition Data	
9	Copy Requisition Data	
Inform NPC	Paste Regulation Data	
Type	Show only Req Points with	Data 🗌
No.	Auto Advance	C
	Allow Auto Full screen	C
	Allow spaces in NPC	Ľ
	View Requirement	С
	View Data	
	1 0	

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.



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	MMD DISTMO (M				6										6	MMD DISTM					(
equisition	n Point/GLN														Requisit	ion Point/0	GLN				
<b>Q</b>	A5673E			•											•	A5673	E				•
EORGE12	23 ( TopUp )														GEORGE	123 ( Topl	Up)				
ro 🛊 🛛 🕯	NPC 🗘	ROL 🔷	ROQ 🗘	BFQ 🗘	* :										Gro ≑	NPC	÷	ROL 🗘	ROQ	BFQ	*
L	11234	10	0	0											DOL	11234		10	0	0	
L I	IABT001	5	0	0											DOL	IABT001		5	0	0	
G F	FTG058	5	0	0											GGG	FTG058		5	0	0	
	1236987	4	0	0											LOUS	1236987		4	0	0	
	FTP008	3	0	0											OIU	FTP008		3	0	0	
	WH0638	20	1	1											QWE	WH0638	3	20	1	1	
	CATNIP	0 5	0	1											S3	CATNIP FXD264		0	0	1	
	FXD264 FSR315	5	0	0											SHE	ESR315		1	0	0	
	FTG023	10	0	0										- 1	TEST1	FTG023		10	0	0	*
		10	0	10											WERT	BULK12	3	10	0	10	*
KI E	BULK123																				
AM 🌣	<	•	ſ	କ			40 AM ♥		-	K123	2456		t⊊ ∎		9:40 AM 🛪			•	2456		मे 💼
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AM 🌣 Am )23 d Handa	<ul> <li>↓ ■</li> <li>nen(FT)</li> </ul>	G023 MPC GS21/M		<b>⊊</b> i Done				meno	BUL	MPC N/A	3456		Done			* • <u>†</u> mend	BUL	-K123 MPC N/A	3456	F	ne (P
AM C Am 23 d Hand	<ul> <li>± i</li> <li>men (FT)</li> <li>dsafe</li> </ul>	GO23 MPC GS21/M Powder Fro Group		<b>⊊</b> i Done			C AI	meno	BUL	MPC N/A jsfl'js' Group	)		Done		NPC BULK1234 Brand N// Sally G Sep UOI	mend	BUL	-K123 MPC N/A isfl'js' Group	3456	F	ne (P
AM 🌣 Am 223 d Handa	<ul> <li>± i</li> <li>men (FT)</li> <li>dsafe</li> </ul>	GO23 MPC GS21/M Powder Fre	ee Sterile P	<b>Done</b>			PC IPC IVLK12345 Irand N/A Sally G Sep	mend 56 tember	BUL	MPC N/A jsfl'js'	0	Price 1+: £0.	Done		H A NPC BULK1234 Brand N// Sally G Sep	mend	BUL 021 jflj	-K123 MPC N/A	F	F	ne (P
AM CAM Am 23 Hand ination ( f 50	t     i	GO23 MPC GS21/M Powder Fro Group TEST1 BFQ	eee Sterile P Price 1+ : 4	Cone		B B S S U B R R 1	AI	mend 56 tember	<b>BUL</b> 2021 jflj	MPC N/A jsfl'js' Group WERT BFQ 10	Quantity	Price 1+ : £0.	Done (* .00		A NPC BULK1234 Brand N// Sally G Sep UOI Bottle of 1 ROL 10	tember 20	BUL D21 jflj	.K123 MPC N/A isfl'js' Group WERT BFQ 10	F	Tice + : £0.00	ne (P
AM 🌣 Am 223 d Handd hination (	t      inner(FTC  dsafe Gloves Latex  ROQ N/A	GO23 MPC GS21/M Powder Fro Group TEST1 BFQ N/A	ee Sterile P Price 1+ : i	Cone		B B S S U B R R 1	AI	tember R N N 20	2021 jfij 202	MPC N/A jsfl'js' Group WERT BFQ 10 Order	Quantity	Price 1+:£0 Quantit	Done (* .00		A NPC BULK1234 Brand N// Sally G Sep UOI Bottle of 1 ROL 10	semend stember 20 Ror N/4	BUL D21 jflj	.K123 MPC N/A isfl'js' Group WERT BFQ 10	F	Dor	ne (P
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# 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.



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DISTMO (MO 933)	•	DISTMO (MOI933)	•	DISTMO (MO(933)	•
Select Store		Select Store		Select Store	
T Select	•	Select	•	Select	•
Load MMD + LC Send M	MD data	Load MMD + R Send	MMD data	Load MMD + R.LC Send	MMD data

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.

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Load MMD + LC Send MMD data	Load MMD + R	Send MMD data	Load MMD + R.LC	Send MMD data
< 0 □	⊲ <			

#### **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.

FQT1029 Scan Product Barc		te	
Barcode ÷	Туре	+ U0M	
455666	NONE	CASE	
010871764818.	NONE	CASE	
012345678901	GS1	CASE	
Barcode 012345678901	Type 28 GS1		
Created 09/07/2018 06	35:26 Techr	n	
	Delete		



#### **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.

2	0	🖻 🛯 9:40 a.m.
← Amend A	015012	Done
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Product Description A015012 TEMP PE CATHETER 12F.Te		
UOI Case of 1	BFQ N/A	
Price £ 6.99	ROL 20	
ROQ N/A		
Stock Quantity	Order Quantity	
0 > Quantity	y 0 >	Quantity
Undo	Delete	
	$\bigcirc$	
	-	
$\triangleleft$	0	

- 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.

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Requisiti	ion Point/GL	N					Produ	ct Description				Re	quisitie	on Point/GLN			
9	A5673H	1			*		4662		X 1-1/4 SOC	CKET HE	AD C (CN:		9	A5673H			•
MEDICA	L CTR, DAL	EBK	S ( Manua	4)		1	UOI	,	BFQ			ME	DICAL	CTR, DALE BKS	(Manual)		
Gro	NPC		ROL	R00 .	BFQ .	*.	Each	1	N/A			NP	С		Order qty		_
	101K		25	0	0		Price £3		ROL N/A			þ	ype o	or Scan NPC	Quar	tity A	dd
	123455		25	0	0		ROQ					No	4	NPC (3) 🔹	Order qty	A/D	4
	2161		20	0	0		N/A					1		test	2		
	4662000		0	0	0		Church	C	Order	Quantity		2		gwert	3		
	A015012		20	0	0			Quantity				3		12345	10		
	A015109		0	0	0		0	> Quan	0 tity	<b>)</b> Q	uantity	-		12340	10		
	AA8012		4	0	8			Undo	Delete		Skip						
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	ABT058		10	7	0												
	AIH2410	_	1	0	0				-								
	⊲	1	0					$\triangleleft$	0					⊲	0		



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.

showing all 3 lines			(T	opup, P	referred delivery	day: Monda	ay, Tuesda		1 - CASTLE W day, Thursday	
Page size 10 <u>25 50 100</u>									Prev Pag	e 1 Next
<u>NPC</u> GTIN	Demand type	VLT Group days key	Scaling UOI	ROL	ROQ Adjustment	On order quantity	Stock quantity	Order quantity	Requisition quantity	Line valu
PRODUCT123 58521475698549 French stick	External	O	1 Each	10	0	٥	0	0	10	12.0
PRODUCT456 12345678912343 Chelsea buns	Internal	D	1 Pack	10	0	0	8	0	2	3.
PRODUCT789         58967415896239           Lemonade - no sugar	External	0	1 Bottle	24	0	0	20	0	4	8.0
								Total	23.00	



# 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.

🗢 💎 🛔 10:28 a.m.	🖬 🗢 🛡 🗎 10:28 a.n
≡ Receipt :	≡ Receipt :
BULK	BULK
Planned     Unplanned	Planned     Unplanned
Scan Product Barcode Scan NPC, EAN or GTIN Reset	Scan Product Barcode Scan NPC, EAN or GTIN Reset
Sales Order     Order	Order List X
Select Order Number 01679M (05/07/2018)	5 O1679M (05/07/2018)
Automatically Put Away	Automatically Put Away
Receipt By Exception	Receipt By Exception
Begin Receipting	Begin Receipting
⊲ 0 □	

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).

🗢 💎 🗎 10:28 a.m.
≡ Receipt :
BULK
Planned     Unplanned
Scan Product Barcode Scan NPC, EAN or GTIN Reset
Sales Order     Order
Select Order Number 01679M (05/07/2018)
Automatically Put Away Receipt By Exception
Begin Receipting
< 0 □

- 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.

BULK		
Scan Product Barcode	28 Barcode	Reset
NPC FQT1398	MPC 121852	
GTIN 03596010064998	_	_
Quantity to Receipt	Total Received	
1	1	
Batch Number	Serial Number	_
Expiry Date		
31-Aug-2018		<b></b>
Mark as Comple	ete	
	Add	
Last Scan : Batch Numb	er : it 31-Aug-2018	

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.

BULK Scan Product Barcode	
Bcan 681-12	I Barcode Reset
NPC I	MPC 121852
Quantity to Receipt	Total Received
1	1
Batch Number	Serial Number
a	
Expiry Date	
31-Aug-2018	
C PREVIOUS	NEXT S
Save	changes

- 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.

12:03 🐵	* <b>* 0</b> 12:04 @	)	÷ 🐨 🖬			🗢 🔻 🛔 10:30 a.m.			•	7 🗎 10:30 a.m.
= Put Away Put A	way All 🔶 I	Put Away	Done	≡ Put	Away	Put Away All	← Pu	t Away		Put Away All
Select or Scan Product Scan Product Barcode Can NPC, EAN or GTIN NPC Bin(g) + 55- F30000 1	st MPC Serial MK45 Expiry 06-Au Group 1 None	GTIN None Batch 556L None 9-2025 1 in stock key Informatik	NO.	Scan Produc	can NPC, EAN or GT		1	GT No Luct Barcode Scan GS1-128 Bar	rcode	· @+
	Referen	nce e Here	_	FQT046 FQT047	E2/04 6 E2/04 6		15150 345677	21-0072019 30-NOV-2018	NONE	1
	Quantin	y to Put Away		PQT10298 PQT10295 PQT10306 PQT10307 PQT10309 PQT10312 PQT10313	E2/92         8           E2/92         8           E2/95         6           E2/96         6           E2/96         6           E2/96         6           E2/97         6           E2/97         6		95955	23-007-2019	NONE	→ [ ] 
< • •		4 •	-	4	0		<	ı 0		0

- 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).

FQT10309		
Scan G	S1-128 Barcode	Reset
MPC None	GTIN None	
Batch Number	Serial Number	
Expiry Oste		
Quantity to Create		
θ	Đ	

- **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.

		🖨 🔻 🛔 10:31 a.m.		🗢 💎 🗎 10:31 a.m.
≡ Issu	ıe		← Issue	Done
Scan Produc	Scan Product et Barcode Ican NPC, EAN (	or GTIN Roset	None Serial	i STIN None Batch
NPC + 098765	Bin(g) ÷	Stock +	Expiry	12345
FQC021		25	31-Jul-2018	
FQT046	E2/04	3	Department	
FQT10293	E2/02	11	All	· · ·
FQT10295	E2/02	10	Client	
FQT12589	E2/01	1	N/A	•
FQT1259	A2/08	4	Reference	
FQT12590	E2/01	4	Type Here	
FQT12591	E2/03	4	Quantity to Issue	
FQT12593	E2/06	4		
FQT12594	E2/06	4		· · · · ·
FQT12595	E2/06	4		
<1	0		< <	) []

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.

🗔 🕒 🛡 🖠 10:33 a.m.		10:33 a.m.
Return to Stock	Return to Stock	Done
Select or Scan Product	E FQT12594	i
Scan Product Barcobe	MPC GTIN None None	_
NPC + Bin(g) + Last + Issued +	Serial Batch None 50338	_
FQT10293 E2/02 16/0 1 FQT12594 E2/06 16/0 2	Expiry 21-Oct-2019	- 1
ΤΥΤΤΑΟΡΤ 6.0102 ΤΟΡΕ. 6.	Client Issue Quantity Mr Turner 2 Reference Type Here Quantity Return to Stock	
< ○ □		

- 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.



#### 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.

			🕈 🖤 📋 10:33 a.m.					):33 a.m.	1		0 🕈	🗎 10:33 a.n	n.
≡ Retu	urn to Su	upplier		←	Return t	o Supplier		Done	÷	Reaso	n	×	
Select or S		uct		0	NPC FQT1259			i		0	Expired		
	can NPC, E	AN or GTIN	Reset	MPC None	e	GTIN None			N	0	Short dated	- 18	
NPC +	Bin(g)	÷ Sto	ck ÷	Serial	e	Batch 5466			Si N	0	Incorrect delivery	- 18	
098765 FQC021		88 25		Expiry 21-0 Reas	ct-2019	Stock 2 in sto	ock		E) 2 B)	0	Faulty product	- 18	
FQT046 FQT10293	E2/04 E2/02	3			pe Here				l	0	Customer damaged	- 18	
FQT10295 FQT12589	E2/02 E2/01	10		Quar	tity Return to S					0	Inventory level reduction		
FQT1259 FQT12590	A2/08 E2/01	4								0	Product/range swap		
FQT12591 FQT12593	E2/03 E2/06	4								0	out		
FQT12594 FQT12595	E2/06 E2/06	2								0	Product recall	- 1	
⊲		0			$\triangleleft$	0				⊲	0		

- 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.

🖬 🗢 🔻 🛢 10:33 a.m.			0 🔻	🗎 10:33 a.m.			0₹	📔 10:34 a.m.
= Transfer	= Trar	nsfer			← 1	Fransfer		Done
Select Destination Store Transfer to Site Dependence Lease and Coole Licensite	Select or Scan Product Scan Product Barcode MPC Scan NPC, EAN or GTIN Reset None None None						i	
Transfer to Store	NPC +	Bin(g)		÷	Serial None		Batch 54781	
Store List X	098765 FQC021		88 25			t-2019	Stock 4 in stock	
O M0007C TechM	FQT046 FQT10293	E2/04 E2/02	3 10	- 1	Quantity	y to Transfer	Ð	
	FQT10295 FQT12589	E2/02 E2/01	10		<b>—</b>			
	FQT1259	A2/08 E2/01	4	- 1				
	FQT12591 FQT12593 FQT12594	E2/03 E2/06 E2/06	4 4 2	- 1				
	FQT12595	E2/06	4					
	$\triangleleft$	C	)			⊲	0	

- 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**.

🖂 🗢 👻 🗎 10:34 a.m.			() H 🖌 🖬 🛔 12:45					Image: Image				
≡ Comms		Done		Comms			Done	=	Comms		Done	
		ור		Usemame TECHM					Usemame TECHM			
Select MMD			Select 1	MMD				Select	MMD			
DISTMO	(MO 933)	•	B	DISTMO (	M0(933)		•		DISTMO (	MO 933)	•	
Select Store			Select 5	Store				Select	Store			
Finiselect		•		Select				1	Select		•	
Exclude requ	istition point without Ro	_		ad MMD + R	ing Data Send	d MMD data			xclude requis	tition point wit	hout Rqmnt MMD data	
			12:44:58	I Generating new I Starting MNID d I —Start—		* O		12:452 12:452 12:452 12:452 12:452 12:452	Sending upload	. 📀 nplete 🕑 ite. Updating statu data (1 lines) 💽	-	
Q	0 🗆			⊲	0			19.469	Data menaration			

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.

emand summary			
howing 5 summaries			
Requisition point	Created	Last updated	Summar
100001 - CASTLE WARD [52] (GLN: 6785643256765) [Topup. Preferred delivery day: Monday, Tuesday, Wednesday, Thursday, Friday ]	Mrs Alison Peck on 20/02/2018 15:51:31		<u>1 record in tot</u>
100005 - WEAVER WARD [47] (GLN: 8738294746374) [ Automatic, Preferred delivery day: Monday, Tuesday, Wednesday, Thursday, Friday ]	Mrs Alison Peck on 15/02/2018 13:52:30		5 records in tota 5 missing requirement
100007 - PALACE WARD [45] (GLN: 9483728394926) [ Automatic, Preferred delivery day: Monday, Tuesday, Wednesday, Thursday, Friday ]	Mrs Alison Peck on 09/02/2018 09:44:00		2 records in tota 2 missing requirement
103025 - PRIORY WARD [34] (GLN: 4839203053928) [ Automatic, Preferred delivery day: Monday, Tuesday, Wednesday, Thursday, Friday ]	Mrs Alison Peck on 09/09/2015 14:47:00	Mrs Alison Peck on 09/09/2015 14:49:12	4 records in tota 2 missing requirement
101001 - CATHEDRAL WARD [42] (GLN: 7238293847283) [ Automatic, Preferred delivery day: Monday, Tuesday, Wednesday, Thursday, Friday ]	Mrs Alison Peck on 23/08/2013 17:17:49	Mrs Alison Peck on 23/08/2013 17:17:49	<u>0 records in tot</u>

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 ma	anagement [27	53906]					Dema	ndType	All (4) Stock Demand (0)	7	Filter
Showing all	4 lines					[ Automatic, Pre	eferred deli	ivery day	External Demand (0) Internal Demand (0) Deleted Demand (0)	(1)	ARD [34] hursday, Friday ]
Page size 10	<u>25 50 100</u>						_		Unauthorised Require Missing Product (0)		1 Next
NPC	GTIN	Demand type	VLT Group days key	Scaling UOI	ROL	ROQ Adjustment	On order quantity	Stoc quantit	Zero Quantity (1) Product Filter Suspended (0)		Line value
AAR033	5017726170226	None	0	0 Case of 24	0	0	0	4	0	0	0.00
	erages Carbonated	330ml Can Sj	orite Zero 330ml c	an					Create	requirement	
Uploaded	via PDA by apeck	on 09/09/20	15 14:47:00	1 Case of 12	3	3	0	3	5	5	52.05
Cold Beve	erages Juice Drinks	PET Bottle E	lackcurrant Light	t 500ml - PET bottle					Out of stock		
AAR306	5017726175665	None	0	1 Case of 24	1	5	0	4	6	6	57.66
Cold Beve	erages Carbonated	330ml Can Co	oke zero sugar 33	0ml					In stock		
									Total	109.71	
Back	Add new line	Add sugg	jested demand						Save changes	Process	lemand

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.

Select requisition point	
Req point 🮯	
	100001 - CASTLE WARD [52] (GLN: 6785643256765) 100002 - ABBEY WARD [41] (GLN: 4873829382710) 100005 - WEAVER WARD [47] (GLN: 8783824746374) 100007 - PALACE WARD [45] (GLN: 9483728394926) 100098 - SNOWFLAKE RESPITE CARE UNIT (GLN: 8392918273488)

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.

Showing all 1 lines									- CASTLE W	
				[ lopup,	Preferred deliver	y day: Mond	ay, luesda	iy, Wednesc	lay, Thursday	r, Friday
Page size 10 25 50 10	<u>10</u>								Prev Page	e 1 Next
NPC GTIN	Demand type	VLT Group days key	Scaling UOI	ROL	ROQ Adjustment	On order quantity	Stock quantity	Order quantity	Requisition quantity	Line val
PROD456 5896541	2385749 None	0	1 Each	1	0	0	20	0	0	0.0
Rich Tea Biscuits										
								Total	0.00	
							Sav			lemand

- 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.

Add new demand line					
Enter an NPC and produc	t type to find a pro	duct		(	All
Product details					Local Stock
NPC					
MPC					
Full description					
EClass					
Unit of issue					
GTIN					
Brand					
Lead time					
Supplier name					
Price details					
	Band 1	Band 2	Band 3	Band 4	Band 5
Quantity					
Price					
			Cancel	Add new line	Edit deman

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**.

Enter an NPC and produ	t type to find a product				
PROD123 - Ginger nut t	iscuits		All	~	
Local product deta	ils				
NPC	PROD123				
MPC					]
Full description	Ginger nut biscuits				]
EClass	ADA - Biscuits				]
Unit of issue	Case of 20				/
GTIN	45325896741589				]
Brand		/			
Lead time					
Supplier name	1234ref				
Contract reference					
Expense code					
Adhoc product	No				
Price details					-

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.

Showing all 0 lines			[1	opup,	, Preferred delive	ry day: Mond	lay, Tuesda		- CASTLE W lay, Thursday	
Page size 10 25 50 100										
<u>NPC</u> GTIN	Demand type	VLT Group days key	Scaling UOI	ROL	ROQ Adjustment	On order quantity	Stock quantity	Order quantity	Requisition quantity	Line val
PROD456 58985412385749	External	D	1 Each	1	O	O	0	0	1	1.
PROD123 45325896741589	External	O	1 Case of 20	10	O	0	0	0	Create require	0 ment
								Total	1.50	

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 Group days key	Scaling UOI	ROL	ROQ Adjustment	On order quantity	Stock quantity	Order quantity	Requisition quantity	Line value
PROD456 Rich Tea Bi	58965412385749	External	0	1 Each	1	0	0	0	0	1	1.5
PROD123	45325896741589	External	0	1 Case of 20	10	0	0	0	0	10	0.0

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.



	type days key quantity quantity quantity quantity quantity	
type days key quantity quantity quantity quantity quantity	type days key quantity quantity quantity quantity	
AEB135 7613035710733 Stock 0 2 Case of 6 2 0 Scaled 0 0 4 2	AEB185 7613035710733 Stock 0 2 Case of 6 2 0 Scaled 0 0 4 2	Line val
		23.
Cereal breakfast Crisped rice 6x550g retail pack This product has been suspended for the following reason 'Delays due to production shortage'. It is anticipated that the suspension will end on 05/03/2018	Cereal breakfast Crisped rice 6x550g retail pack	

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.

showing al	l O lines				гт	onun. Preferred d	leliverv dav	: Monday.	Tuesday, V	100001 - CASTLE V Vednesday, Thursday	
Page size 1	0 <u>25 50 100</u>								,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		
<u>NPC</u>	GTIN	Demand type	VLT Group days key	Scaling UOI	ROL	ROQ Adjustment	On order quantity	Stock quantity	Order quantity	Requisition quantity	Line val
AEB000	5050083221644	None	0	0 Case of 3	0	0	0	0	8	4	126.
Cereal b	eakfast Crisped rice	e 3x3.33kg								Create requirement	
									Total	23.72	

## 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.



Show	ring all 0 lin	85				[ Τορι	ıp, Pref	erred deliv	very day: I	Monday, Ti		100001 - CASTLE W dnesday, Thursday	
Pages	size 10 <u>25</u>	<u>50 100</u>											
<u>NF</u>	PC	GTIN	Demand type	VLT Group days key	Scaling UOI	ROL	ROQ	djustment	On order quantity	Stock quantity	Order quantity	Requisition quantity	Line valu
AE	EB000	5050083221644	None	0	0 Case of 3	0	0		0	0	8	4	126.4
Ce	ereal breakfas	t Crisped rice 3x3.33	kg									Create requirement	
	BC010 repared feed S	7613035495814 MA Gold Prem 2 90r	Stock	0	1 Case of 32	1	0		0	2	6	6	69.
	RODUCT456 helsea buns	12345678912343	Internal	0	1 Pack	10	0		0	0	20	20	30.
	DB192		Stock	0	1 Each	2	0		4	2	20	20	203.:
Bi	scuit Standar	d Milk chocolate dig	estives 2 bis	cuit pack Case o	f 48							Outstanding order	
											Total	325.92	
Bac		new line 🛛 Add	suggeste								Save cha	nges Process d	

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).

100001 - CASTLE WARD [52] (GLN: 67	785643256765) [ Topup, Prefer	rred delivery day: Monday, Tuesday, Wednesday, Thursday, Friday ]	
	Number of lines	Total value Process [inc VAT]	
tock requisition	2	272.20	
nternal requisition	1	30.00 🖌	
lissing Requirement	1		
otal	4	302.20 V Delete unprocessed items?	



The report opens as a PDF and can be saved or printed as required.

Demand details 100001 - CASTLE WARD [52] (GLN: 6785643256765) Stock demand listing				VHS ly Chain			
MMD Depot District Cost centre		lows Respite Care Unit t depot	To	otal lines tal quantity tal price reated by		Mrs Ali	2 26 272.20 son Peck
NPC		Description		SupplierName	UOI	Quantity	Value
ABC010 (GTIN: 761303549	5814)	Prepared feed SMA Gold Prem 2 90ml		NESTLE UK LTD	Case of 32	6	69.00
ADB192		Biscuit Standard Milk chocolate digestiv pack Case of 48	vəs 2 biscuit	UNITED BISCUITS LIMIT	Each	20	203.20
					Total	26.00	272.20

#### Process the requisitions

When you **Process** the requisitions, they are sent to NHS Supply Chain or your local Purchase Order system as appropriate.

100001 - CASTLE WARD [52] (GLN:	6785643256765) [ Topup, Prefe	rred delivery d	lay: Monday, Tuesday, Wednesday, Thursday, Friday ]	
			-	
	Number of lines	Total value [inc VAT]	Process	
tock requisition	2	272.20	$\checkmark$	
ternal requisition	1	30.00		
issing Requirement	1			
otal	4	302.20	Delete unprocessed items?	

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).

Demand process summary 100001 - CASTLE WARD [52 [Topup, Preferred delivery of Thursday, Friday]	] (GLN: 6785643256765)	nesday,
Demand Type	Line count	Order details
Stock Demand	2	Order numbers 02396M (Stock) created successfully
Internal Demand	1	View details for order id 3876537
Missing Requirement	1	This demand has been deleted
Back to demand summary		



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).

rocess demand [3649235] 100001 - CASTLE WARD [52] (GLN:	6785643256765) [ Topup, Prefer	red delivery day: Monday, Tuesday, Wednesday, Thursday,	Friday ]
	Number of lines	Total value Process [inc VAT]	
ock requisition	2	272.20	
ternal requisition	1	30.00 🖌	
issing Requirement	<b>1</b>		
otal	4	302.20 Delete unprocessed items?	
Back Stock Take			Process

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.



00002 - ABBEY WARD [41] [ Manua	II, Preferred delivery day: Monday,	; Tuesday, Wednesday, Thursday, Friday ]	
	Number of lines	Total value Process	
		[inc VAT]	
ock requisition	1	5,344.30	
ssing Requirement	1	8,037.50	
tal	2	13,381.80 🔲 Delete unprocessed items?	

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.

103025 - PRIORY WARD [34]	GLN: 4839203053928) [ Auton	natic, Preferred delivery day: Monday, Tuesday, Wednesday, Thursday, Friday ]
	Number of lines	Total value Process [inc VAT]
ot in catalogue		[me vir]
ero Quantity	3	
otal	4	0.00 🗹 Delete unprocessed items?

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.



Stock take completed suc	ccessfully - stock take reference number	r 9105	6
103025 - PRIORY WARD [34	4] (GLN: 4839203053928) [ Autom	atic, Preferred delivery day: Monday, Tuesday, Wednesday, Thursday, Friday ]	
	Number of lines	Total value Process [inc VAT]	
ot in catalogue	1		
ro Quantity	3		
		0.00 V Delete unprocessed items?	

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.

Home NHS Cat	Online Ordering	Suppliers About Us C	Contact Us Search
Ň	Ţ.		
Catalogue Requir	ement Demand	Stock Reports Configuration	Log out
Welcome to E	DC		
MMD selection			
Warehouse	933 - Test dep		
Criteria			
MMD	AJP123 - Hollo AJP124 - Hollo BURDYS - Bu		oot 10]
	DIST01 - TRA DIST02 - TRA	Stock management	Receipting
	DIST03 - TRAI DIST06 - TRAI	NING 03 [Test depot 03] NING 06 [Test depot 06]	Putaway
		NING 23 [Test depot 23] NING 30 [Test depot 30]	Issue
		NING 35 [Test depot 35]	Return to stock
Store selection			Return to supplier
Site	HBC-01 - Hollo	ows - Manor Farm site	Stock transfer
Store	Castle - Castle	Ward	

- 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.

PROD123 (GTIN: 45325896741589)	ref Unplanned UOM Case 🗸 qty
Ginger nut biscuits null	

- 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.

eceipting			[		9
db iter search term (order num, P/O num, product descrip	tion, NPC or GTIN)		Receipt only		Receipt
planned Planned			PRODUCT123 (GTIN: 58521475698544)	ref Unplanned U	OM Each 🗸 qty 📄 👔
395M ADB192			French stick	Bato	h no l
scuit Standard (2 of 2)	Expected delivery date: 26/02/2018		null		
Ik chocolate digestives 2 biscuit pack Case of 48				Expiry	date
396M ADB192					
scuit Standard (20 of 20)	Expected delivery date: 26/02/2018		02394M ADB192	ref 02394M	🖌 UOM Each 🔽 qty 2
k chocolate digestives 2 biscuit pack Case of 48			Biscuit Standard (2 of 2)		•
			Milk chocolate digestives 2	biscuit pack Out a of 48	
		~			
		•			
		~		0 7	•
				- 4	8
					•

#### 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:

- serial number is being tracked
- 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 (⁽²⁾).

The quantity for this product is automatically set to the number of serial numbers recorded for it. Click **OK**.

Serial numbers for AAR302	×
Enter serial numbers. Hit return after each number.	
SN111A 8 SN112A 8 SN113A 8	
	ок

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**).

PROD456	Search	Receipt and put away	✓ Receipt
nter search term (order num, P/O num, product descrij	ption, NPC or GTIN)	02399M ENP006 ref 02399M	🗩 🗸 qty 2 📑 (
392M AAR302 TIN: 5054267402348)	BS		ch no. BN234
old Beverages Juice Drinks PET Bottle (38 of 50) ackcurrant Light 500ml - PET bottle atch ref: Serial number_ Expiry Date:	Expected delivery date: 22/02/2018		/ date 01/05/2018
401M ENP006 A	B	(GTIN: 5050083221644)	JOM Case 🗸 qty 1
apkin dental absorbent gauze (4 of 4)	Expected delivery date: 23/02/2018	Cereal breakfast (3 of 3) Crisped rice 3x3.33kg Expiry Date:	/ date 18/04/2018
		<u>به</u>	

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.

EB000 ter search term (order num, P/O num, proc	X Search	Receipt only	✓ Receipt
planned Planned			
401M AEB000 TIN: 5050083221644)			
real breakfast (2 of 3)	Expected delivery date: 23/02/2018		
piry Date:			

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.

EB000 er search term (order num, P/O num, product description, NPC or GTIN)	Search	Receipt only	✓ Receipt
alanned Planned		02401M AEB000 ref 02401M (GTIN: 5050083221644)	
		Cereal breakfast (2 of 3) Crisped rice 3x3.33kg Expiry Date:	Expiry date



#### 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.

rod Iter search term (product description, NPC or GTIN)	Search	5 Process
ROD789 (GTIN: 63552612717825) RODUCT123 (GTIN: 58521475698549)		PROD769 (U01: Each 1)
RODUCT123 JOI: Each 1)	B	Coffee making machine Qty: 1 null
rench stick ull	Qty: 2	Serial number: SN678 PRODUCT123 Bit (* Qty 0 Dept. V Client V Ref
RODUCT123 UOI: Each 1)	B	(UOI: Each 1) French stick Qty: 2
irench stick ull Jatch ref: BN543 Expiry date: 31/03/2018	Qty: 3	Batch ref: ABC123 Expiry date: 30/04/2018
RODUCT456 (GTIN: 12345678912343) RODUCT456		
UOI: Pack 1)		Ŭ <b>3</b> 4
Chelsea buns ull	Qty: 11	- 4

- 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).

ter search term (product desc, NPC or GTIN). Num days issue t	show.		5 Process
ROD789 (GTIN: 63552612717825)	S	PRODUCT123 (GTIN: 58521475698549)	Ref Qty 1
Coffee making machine uil seued 23/02/2018 13:59:34 serial number: SN678	2 3	French stick null Issued 23/02/2018 13:59:35 Batch ref: ABC123 Expiry Date: 30/04/2018	

#### 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.



ms in stock						4 —	Process
NP006 (GTIN: 5019829039202)				PRODUCT123	🔠 💌 Qty	2 Reason	Expired Short dated
NP006	В 🖛			French stick			Incorrect delivery
apkin dental absorbent gauze 5 x 15cm atch ref: BN234 Expiry date: 01/05/2018	Qty: 2					-	Faulty product Customer damaged Inventory level reduction
HH023							Product/range swap out Product recall
HH023							Other
est Kit 0 x ovulation urine LH midstream tests 20mIU/ML	Qty: 200				2	1	A
RODUCT123 (GTIN: 58521475698549)					-		
RODUCT123	B 🔻		•			/	
rench stick ull stch ref: ABC123 Expiry dste: 30/04/2018	Qty: 1		۲				
RODUCT123	B 🔻					3	
rench stick ull atch ref: BN543 Expiry date: 31/03/2018	Qty: 3						
RODUCT456 (GTIN: 12345678912343)							
RODUCT456							
helsea buns	Qty: 11	$\overline{}$					

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.



Stock locator						Filter NPC/GTIN	PROD		Search
Search result	S							Showing	all 8 results
Page size 10	<u>25 50</u>	<u>100</u>						Prev Pa	age 1 Next
	Product type	Base description	Secondary description	Quantity	Primary location	Bin Grou location key	p Batch Seria ref. no.	I Expiry	Quarantine
PRODUCT123 58521475698549	Local	Frenchallen		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	3
PRODUCT458 12345678912343	Local	Chelsea buns		10	N/A	Goods			
PROD789 63552612717825	Local	Coffee making machine		1	N/A	Goods in	ABCI	D123	
PROD789 63552612717825	Local	Coffee making machine		1	N/A	Goods in	DEF	3123	
PROD789 63552612717825	Local	Coffee making machine		1	N/A	Goods in	ніјк	123	
PRODUCT123 58521475698549	Local	French stick		3	N/A	Store	BN543	31/03/2018	3
Page size 10	25 50	100						Prev P	age 1 Next

# 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.



earch results					Chausian	-11.2
earch results					snowing	all 3 resu
Page size 10 <u>25 50 100</u>					Prev F	Page 1 Ne
NPC GITN	Product type	Base description	Secondary description	Quantity	Unit price	Total p
PROD789 63552612717825	Local	Coffee making machine		3	234.56	70
PRODUCT123 58521475698549	Local	French stick		14	1.20	1
PRODUCT456 12345678912343	Local	Chelsea buns		21	1.50	3
Total				38		75
		Please n	ote, prices include VAT.			
Page size 10 <u>25 50 100</u>					Prev	Page 1 Ne

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.



Product deta	ils							
NPC		PRODUCT123						
Product type		Local						
escription		French stick						
econdary des	scription							
roup key	Bin location		Expiry	Batch ref.	Serial no.	Quantity	Total price	Quarantined
	STORE	•	28/02/2018	ABC12		2	2.4	
	STORE	•	23/02/2018	BN22		5	6	
	STORE	•	28/02/2018	BN11		3	3.6	
	STORE	•	31/03/2018	BN543		3	3.6	
	STORE	•	30/04/2018	ABC123		1	1.2	
Page size 10	<u>25 50 100</u>							Prev Page 1 Nex

# 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.

	0         25         50         100         Prev         Page         1         2         3         4         5         7         8         9         10         Next >>           Product Yape         Transaction Yape         Department Yape         Local Local         Client Yape         Group D         Quantity Kap         Expire date         Batch ref.         Serial number         Unit Cost         Transaction Yape         VAT Fall         Date         Transacted by           Local         Receipt         Unplanned         5         23/02/2018         BN22         1.20         6.00         0         23/02/2018         Alison Peck 14/22.44         Alison Peck 14/22.44           Local         Putaway         Putaway         Putaway         5         23/02/2018         BN11         1.20         6.00         0         23/02/2018         Alison Peck 14/22.44         Alison Peck 14/22.44         Alison Peck 14/22.44           Local         Receipt         Unplanned         3         28/02/2018         BN11         1.20         3.60         0         23/02/2018         Alison Peck 13.59:34           Local         Issue         SLT123         1         SN878         234.56         23/02/2018         Alison Peck 13.59:34         Alison Peck	Date from		Date to		NPC/	GTIN				Туре	None		✓ Sear	ch		
NPC GTIN         Product type         Transaction type         Department type         Local reference         Client ID         Group key         Quantity date         Expiry ref.         Batch number         Serial cost         Unit value         Transaction value         VAT rate         Date table           PRODUCT123         Local         Receipt         Unplanned         5 23/02/2018         BN22         1.20         6.00         0 23/02/2018           PRODUCT123         Local         Putaway         Putaway         5 23/02/2018         BN22         1.20         6.00         0 23/02/2018           BSS21475069549         Putaway         Putaway         5 23/02/2018         BN11         1.20         3.60         0 23/02/2018           PRODUCT123         Local         Receipt         Unplanned         3 28/02/2018         BN11         1.20         3.60         0 23/02/2018	Product type         Transaction type         Department reference         Client ID         Group key         Quantity date         Expire ref.         Batch number         Serial number         Unit cost         Transaction yabe         VAT rate         Date by         Transacted by           Local 40         Receipt         Unplanned         5 23/02/2018         BN22         1.20         6.00         0 23/02/2018         Alison Peck 14/22:44           Local 40         Putaway         Putaway         5 23/02/2018         BN22         1.20         6.00         0 23/02/2018         Alison Peck 14/22:44           Local 40         Receipt         Unplanned         3 28/02/2018         BN11         1.20         3.60         0 23/02/2018         Alison Peck 14/22:44           Local 25         Issue         SLT123         1         SN678         234.56         0 23/02/2018         Alison Peck 13/59:34           Local 25         Issue         SLT123         1         SN678         234.56         0 23/02/2018         Alison Peck 13/59:34           Local 40         Receipt         Unplanned         3 31/03/2018         BN543         1.20         3.60         0 23/02/2018         Alison Peck 13/53:39           Local 40         Putaway         Putaway         S 31/03/2018<	Search resul	ts												Showi	ng 1 - 10 of	129 results
GTIN         type         type <th< th=""><th>type         type         reference         IQ         key         date         ref.         number         sost         value         rate         by           Local         Receipt         Unplanned         5         23/02/2018         BN22         1.20         6.00         0         23/02/2018         Alison Peck           Local         Putaway         Putaway         5         23/02/2018         BN22         1.20         6.00         0         23/02/2018         Alison Peck           Local         Receipt         Unplanned         3         28/02/2018         BN11         1.20         3.60         0         23/02/2018         Alison Peck           Local         Receipt         Unplanned         3         28/02/2018         BN11         1.20         3.60         0         23/02/2018         Alison Peck           Local         Receipt         Unplanned         3         28/02/2018         BN11         1.20         3.60         0         23/02/2018         Alison Peck           Local         Issue         SLT123         1         SN678         234.56         23         23/02/2018         Alison Peck           40         Local         Receipt         Unplanned         &lt;</th><th>Page size 10</th><th><u>25 50 1</u></th><th>100</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th>Prev</th><th>Page 1 <u>2</u></th><th><u>3 4 5</u></th><th><u>6</u> <u>7</u> <u>8</u> <u>9</u></th><th><u>10</u> <u>Next &gt;&gt;</u></th></th<>	type         type         reference         IQ         key         date         ref.         number         sost         value         rate         by           Local         Receipt         Unplanned         5         23/02/2018         BN22         1.20         6.00         0         23/02/2018         Alison Peck           Local         Putaway         Putaway         5         23/02/2018         BN22         1.20         6.00         0         23/02/2018         Alison Peck           Local         Receipt         Unplanned         3         28/02/2018         BN11         1.20         3.60         0         23/02/2018         Alison Peck           Local         Receipt         Unplanned         3         28/02/2018         BN11         1.20         3.60         0         23/02/2018         Alison Peck           Local         Receipt         Unplanned         3         28/02/2018         BN11         1.20         3.60         0         23/02/2018         Alison Peck           Local         Issue         SLT123         1         SN678         234.56         23         23/02/2018         Alison Peck           40         Local         Receipt         Unplanned         <	Page size 10	<u>25 50 1</u>	100									Prev	Page 1 <u>2</u>	<u>3 4 5</u>	<u>6</u> <u>7</u> <u>8</u> <u>9</u>	<u>10</u> <u>Next &gt;&gt;</u>
588521475698549         14:22:44           PRODUCT123         Local         Putaway         5 23/02/2018         BN22         1.20         6.00         0 23/02/2018           585521475698549         Unplanned         3 28/02/2018         BN11         1.20         3.60         0 23/02/2018	49       14:22:44         Local       Putaway       \$ 23/02/2018       BN22       1.20       6.00       0       23/02/2018       Alison Peck         40       Local       Receipt       Unplanned       3 28/02/2018       BN11       1.20       3.60       0       23/02/2018       Alison Peck         40       Local       Receipt       Unplanned       3 28/02/2018       BN11       1.20       3.60       0       23/02/2018       Alison Peck         40       Local       Issue       SLT123       1       SN078       234.56       2       23/02/2018       Alison Peck         25       Local       Local       Unplanned       3       31/03/2018       BN543       1.20       3.60       0       23/02/2018       Alison Peck         49       Local       Unplanned       3       31/03/2018       BN543       1.20       3.60       0       23/02/2018       Alison Peck         49       Local       Putaway       Putaway       3       31/03/2018       BN543       1.20       3.60       0       23/02/2018       Alison Peck         40       .       .       .       .       .       .       .       .       .				<u>Department</u>				Quantity							<u>Date</u>	
588521475698549         14-22:44           PRODUCT123 Local Receipt         Unplanned         3 28/02/2018 BN11         1.20         3.60         0 23/02/2018	49         14:22:44           Local         Receipt         Unplanned         3 28/02/2018         BN11         1.20         3.60         0 23/02/2018         Alison Peck           Local         Issue         SLT123         1         SN078         234.56         234.56         0 23/02/2018         Alison Peck           Local         Receipt         Unplanned         3 31/03/2018         BN543         1.20         3.60         0 23/02/2018         Alison Peck           49         Local         Receipt         Unplanned         3 31/03/2018         BN543         1.20         3.60         0 23/02/2018         Alison Peck           40         Putsway         Putsway         3 31/03/2018         BN543         1.20         3.60         0 23/02/2018         Alison Peck           40         Stationary         Putsway         Putsway         3 31/03/2018         BN543         1.20         3.60         0 23/02/2018         Alison Peck			Receipt		Unplanned			5	23/02/2018	BN22		1.20	6.(			Alison Peck
	Local         Issue         SLT123         1         SN078         234.56         234.56         0         2300/2018         Alison Peck           25         Local         Receipt         Unplanned         3         31/03/2018         BN543         1.20         3.60         0         23/02/2018         Alison Peck           49         Local         Putaway         Putaway         Putaway         3         31/03/2018         BN543         1.20         3.60         0         23/02/2018         Alison Peck           49         Local         Putaway         Putaway         3         31/03/2018         BN543         1.20         3.60         0         23/02/2018         Alison Peck           49                                                <			Putaway		Putaway			5	23/02/2018	BN22		1.20	6.(	-		Alison Peck
13:59:35 13:59:35	Local         Issue         SLT123         1         SN678         234.56         234.56         0         23.00/2018         Alison Peck           25         Local         Receipt         Unplanned         3 31/03/2018         BN543         1.20         3.60         0 23/02/2018         Alison Peck           49         Local         Putaway         Putaway         3 31/03/2018         BN543         1.20         3.60         0 23/02/2018         Alison Peck           49         Putaway         Putaway         3 31/03/2018         BN543         1.20         3.60         0 23/02/2018         Alison Peck           49         Putaway         Putaway         3 31/03/2018         BN543         1.20         3.60         0 23/02/2018         Alison Peck	RODUCT123	Local	Receipt	~~~~	Unplanned	~~~~	~~~~~	3	28/02/2018	BN11		1.20	3.(	0	23/02/2018	Alison Peck
	25 13:59:34 Local Receipt Unplanned 3 31/03/2018 BN543 1.20 3.00 0 23/02/2018 Alison Peck 49 Local Putaway Putaway 3 31/03/2018 BN543 1.20 3.60 0 23/02/2018 Alison Peck 49 13:53:39	8521475698549		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~_~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	,			~~~~~		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		13:59:35	1
	49 13:53:39 Local Putaway Putaway 3 31/03/2018 BN543 1.20 3.60 0 23/02/2018 Alison Peck 49 13:53:39			Issue		SLT123			1			SN678	234.56	234.			Alison Peck
	49 13:53:39			Receipt		Unplanned			3	31/03/2018	BN543		1.20	3.6	-		Alison Peck
	Local Receipt Unplanned 1 SN678 234.56 234.56 0.23/02/2018 Alison Perk			Putaway		Putaway			3	31/03/2018	BN543		1.20	3.6			Alison Peck
		ROD789 3552612717825	Local	Receipt		Unplanned			1			SN678	234.56	234.5			Alison Peck



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 dropdown 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.

rint order	NPC V	
emand type	Stock 🗸	
IPC from	<ul> <li>Image: A state of the state of</li></ul>	
IPC to	2	
Group key from	2	
Group key to	2	
vailable req points	0	
772153 - X-RAY RDH 772207 - CLINICAL E 772251 - WARD 405 772253 - MAU RDH (i 772254 - ENDOSCOF 772256 - GENERAL N 772257 - RENAL UNI	/ UNIT RDH (GLN: 5055205685816) EDICAL OPD RDH (GLN: 5055205685830) RDH (GLN: 5055205685847) DH (GLN: 5055205685854)	
	DH (GLN: 5055205685861)	

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.



SENERAL MEDICINE DCG										S Supply Cha
ReqPoint 770004 - WARD 3			-							
NPC	MPC	UOI		VLT Group key	Type	Price	ROL	ROQ	MSL	Max Val GL code
ELW041 (GTIN: 5000223049256) Dressing IV vapour-permeable adh	4925 esive film sterile 1	Pack 10		TREAT	S	18.62	1.00	0.00	1.00	18.62 72623027
ELW071 (GTIN: 5000485043283)	1623W	Pack 100	Tegaderm IV	TREAT	S	31.24	1.00	1.00	2.00	62.48 72623027
Dressing IV vapour-permeable adh										
ELW213 (GTIN: 5000485003966) Dressing vapour-permeable adhesi	1626W ive film sterile 10o		Tegaderm	TREAT	S	30.40	1.00	1.00	2.00	60.80 72623027
ELY038 (GTIN: 8711428085884)	3343E	Box 25	Cavilon	TREAT	S	27.52	1.00	1.00	2.00	55.04 72623027
Barrier film foam applicator no sting 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 28	Bml Pump Action									220.79
Barrier film spray no sting sterile 28	Bml Pump Action									220.79
Barrier film spray no sting sterile 28	ml Pump Action									220.79
Barrier film spray no sting sterile 28	Iml Pump Action									220.79
(GTIN: 8711428077582) Barrier film spray no sting sterile 28 tems: 5	Iml Pump Action									220.79
Barrier film spray no sting sterile 28	Imi Pump Action									220.79
Barrier film spray no sting sterile 28	Iml Pump Action		Authorised by				gnation			220.79

# **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.



Authorisation summary report Selection criteria	
Available req points	
770004 - WARD 312 DCGH (GLN: 5055205683386)           772153 - X-RAY RDH (GLN: 5055205685663)           772207 - CLINICAL ENGINEERING RDH (GLN: 5055205685700)           772251 - WARD 405 RDH (GLN: 505520568573)           7722523 - MAU RDH (GLN: 5055205685809)           772254 - ENDOSCOPY UNIT RDH (GLN: 5055205685816)           772256 - GENERAL MEDICAL OPD RDH (GLN: 5055205685830)           772256 - GENERAL MEDICAL OPD RDH (GLN: 5055205685816)           772256 - WARD 401 RDH (GLN: 5055205685841)           772261 - WARD 402 RDH (GLN: 5055205685861)	
	Generate Expor

A sample of an Authorisation Summary Report is shown below:

		EDC - Authorisation Summary	Report		NHS
SENERAL	MEDICINE DCGH			NHS	Supply Chain
Req point	Req point name	GLM	N	Total lines	Total value
772153	X-RAY RDH	5055	5205685663	311	5,786.36
772251	WARD 405 RDH	5055	5205685793	478	3,064.10
772253	MAU RDH	505	5205685809	526	20,230.25
770004	WARD 312 DCGH	505	5205683386	212	2,359.88
Totals				1,527	31,440.59

# **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.

Barcode report	
Selection criteria	
Label type	Bin labels [Avery L7162]
Print order	NPC V
NPC from	2
NPC to	2
Group key from	2
Group key to	Image:
Date modified	
Available req points	2 2
100002 - ABBEY WA 100005 - WEAVER V 100007 - PALACE W 100098 - SNOWFLA 101001 - CATHEDRA	[52] (GLN: 6785643256765) 11] (GLN: 4873829382710) [47] (GLN: 9483728394926) [59]TE CARE UNIT (GLN: 8392918273488) ARD [42] (GLN: 7238293847283) [34] (GLN: 4839203053928)
	Generat

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.

EDB237	770004 <b>£3.10</b> Pack 20 BFQ <b>ROL</b>	20 1	E6P117	770004 <b>£4.95</b> Each 1 BFQ <b>ROL</b>	1 1
303403 Hospiform (GTIN: 4049500266475) Bandage conforming type 1 dressing retention	ROQ TREAT	1	2436 Tubifast (GTIN: 7332551933821) Bandage tubular elasticated viscose 10m roll	ROQ	1



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.

Print	<u>? ×</u>
Printer <u>Name:</u> <u>Nups-IVALFRETON_GO2_24_A</u> Status: Ready Type: HP LaseJet 2200 Series PCL Print Range	
	8.27
Printing Ips Agvanced	Document: 8.3 x 11.7 in Paper: 8.3 x 11.7 in 1/4 (1) OK Cancel

#### **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).



Requirement report	
Selection criteria	
Print order	NPC V
NPC from	PROD123
NPC to	PRODUCT789
Group key from	Image:
Group key to	Image:
Available req points	0
100002 - ABBEY WAI 100005 - WEAVER W 100007 - PALACE WA 100098 - SNOWFLAK 101001 - CATHEDRA	ARD [52] (GLN: 6785643256765) RD [41] (GLN: 4873829382710) VARD [47] (GLN: 8738294746374) ARD [45] (GLN: 9483728394926) KE RESPITE CARE UNIT (GLN: 8392918273488) AL WARD [42] (GLN: 7238293847283) ARD [34] (GLN: 4839203053928) Generate Export

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.



														IHS
AJP123 Hollows Resp 100001 - CASTLE WA		GLN: 6785643256765	)									NH	IS Supply	Chain
			P		s month	ıly issu	e quan				equireme		Av weekly s	
NPC	Brand	UOI	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) _emonade - no sugar		Bottle	0	0	0	0	0	0	0	24	-	24	0.00	0.00
		up] (GLN: 678564325676									weekly		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.



Requisition report	
Selection criteria	
Report type	Stock V
Print order	Requisition point V
Demand created from	
Demand created to	
Available req points	
	I] (GLN: 4873829382710) (47] (GLN: 8738294746374) 45] (GLN: 9483728394926) SPITE CARE UNIT (GLN: 8392918273488) RD [42] (GLN: 7238293847283)

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.

Local catalogue re		
Selection criteria		
Print order	NPC V	
NPC from		
NPC to		
	Generate Export	)

An example of a local catalogue report is shown below.



		EDC - Local catalogue report					NHS
						NHS	Supply Chain
GENERAL MEDIC	CINE DCGH						
NPC	Base description	Supplier ref	Supplier	UOI	Price	E-class	Expense code
AA029 (GTIN: 7483738473828)	NURSING DUTY ROT	A		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.

italogue Requ	irement Demand Stock	Reports Configuration Log out		
Velcome to E	EDC	Authorisation		
MMD selection	1	Authorisation summary		
Warehouse Criteria	933 - Test depot	Barcode Requirement		
MMD	AJP123 - Hollows Re AJP124 - Hollows [Te AJP125 - Teddy Bear AJP126 - Elm House APPLE - apple 1 [Tes	Requisition	: 10]	
	BURDYS - Burdy's [T CHERRY - Cherry Or CMT16 - Test 1.12.1. CMT17 - Test 1.12.1. CMT586 - Christina -	14 [Test depot 55]	Inventory status Stock take Stock analysis	
Site	[Select site]		Stock analysis summary	
Store			90 day order status	
			Short shelf life	L
			Stock consignment holding	L
			Stock consignment issues	L
			Stock locator	
	L		Stock status	
S Supply Chain Hor	me I Help I Advanced search I Employe	e Log In   Accessibility   Vacancies   Sitemap	Transactions	

#### **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.



	EDC - Inventory status report					NHS			
Hollows Respite Care Unit							NHS Sup	ply Chain	
ReqPoint 100005 - WEAVER WARE NPC	2 [47] (GLN: 8/38294/463/4) Full description	Item type	UOI	ROL	ROQ	Max value	Stock quantity	Stock value	
PRODUCT456 (GTIN: 12345678912343)	Missing requirement	N/A					2		
PRODUCT321 (GTIN: 45325896741589)	Ginger nut biscuits	Ext N/S	Case 20	2	3	0.00	0	0.00	
					~~~			0.00	

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**.

Stocktake report	and the second s
Selection criteria	
Print order NPC V	
Available req points	
100001 - CASTLE WARD [52] (GLN: 6785643256765) 100002 - ABBEY WARD [41] (GLN: 4873829382710) 100005 - WARVE WARD [47] (GLN: 5738294746374) 100007 - PALACE WARD [47] (GLN: 5738294746374) 100098 - SNOWFLAKE RESPITE CARE UNIT (GLN: 8392918273488) 101001 - CATHEDRAL WARD [42] (GLN: 7238239847263) 103025 - PRIORY WARD [34] (GLN: 4839203053928)	
	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.

The report shows the results from the last four stocktakes for comparison. An example report is shown below.



		EDC -	Stocktake	report						Γ	NHS
GENERAL MEDICINE DCGH									NHSS		
772254 - ENDOSCOPY UNIT RDH (G	GLN: 5055205685816)			19/10)/2009	12/0	3/2009	25/0	9/2008	26/0	3/2008
NPC	Group key	UOI	Туре	Qty 1	Value 1	Qty 2	Value 2	Qty 3	Value 3	Qty 4	Value 4
EHA053 (GTIN: 5000485001092) Tape medical adhesive plastic perforated 2.5c	A2 m x 9.14m latex free	Pack 12	Stock	1	7.20	1	7.20	1	7.20	0	0.0
EHR001 (GTIN: 7332551586287) Tape medical adhesive soft cloth 5cm x 10m c	A2 drug tariff	Each 1	Stock	1	1.77	0	0.00	0	0.00	0	0.0
EHU006 (GTIN: 5000485001825) Tape medical adhesive paper 2.5cm x 9.1m la	A2	Pack 12	Stock	1	4.29	1	4.29	1	4.29	0	0.0
ELW071 (GTIN: 5000485043283)	A2	Pack 100	Stock	4	124.96	1	31.24	1	31.24	2	62.4

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.



NHS											
ly Chaiı	S Supp	NH									
										NERAL MEDICINE DCGH	DB0720 GENERAL N
									5205683386)	ARD 312 DCGH [Manual] (GLN: 5055205	770004 - WARD 312
Stock tur		ge weekly su Issue	Avera Value	Stock value	Scaling		Requir ROQ	ROL	UOI	Brand	NPC
	-	0.02	0.04	0.00	-	-	-	-	Pack 20	Hospiform 0266451) rming type 1 dressing retention 6cm x 4m Knitted	EDB008 (GTIN: 4049500266451)
	-	0.08	0.23	0.00	-	-	-	-	Pack 20	EasiFix K	EDB067 (GTIN: 4042809265279)
2.0	26.00	0.08	0.20	6.20	1	2	1	1	Pack 20	Hospiform	EDB237 GTIN: 4049500266475)
	-	0.02	0.08	0.00	-	-	-	-	Pack 20	Hospiform	EDB239 (GTIN: 4049500266482)
		0.19	0.55	6.20						770004 - WARD 312 DCGH [Manual]	5 57

• 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 analysi	s summary repo	rt				NHS
DB0720 GENERAL MEDICINE DCGH				IS Supp	oly Chain	
				age weekly s		
	Stock level	Stock value	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.



				EBC - Older	status report	¢					NHS Supply Chai
\$00048 - (\$C)	-CHERMAR HO LD ORTHO THE Party Gold 30	A 学教授参《参									
Order number Primary)	Purchase order number	Order date	Expected Date	Supplier	NPC	MPC	UOM	Order qty	Receipt of the second s	Outstanding receipt qty	Order status
4248M		18/01/2024	18/01/2024	Aesculap	AES-GA46553A	GA46553A	Each	1	0	1	Stock Due
A46553A Thompsons reviously XXX444D20	Endoprothesis Head TI	53mm Carriage	10 LATEXFREE								
4248M		18/01/2024	18/01/2024	Aesculap	AES-GA46555Z	GA46555Z	Each	1	0	1	Stock Due
A46555Z Thompsons reviously XXX444D22	Endoprothesis Head TI	55mm Carriage	£10 LATEXFREE								
4248M		18/01/2024	18/01/2024	UNIPLEX	BATCHEXPIRY (GTIN: 03425237	MPCBATEXP2 592314)	Cone	21	0	21	Stock Due
ATCHEXPIRY single (pack Secondary										
4248M		18/01/2024	18/01/2024	WG Healthcare UK Ltd	XXX444K22	G Force set	Each	1	1	0	Fully Receipted
nstruments - G Force (Consignment										
4194M		12/01/2024	12/01/2024	HEINZ SINGLE SERVICE LTD	ADL054 (GTIN: 50001570	71017940 84125)	Each	3	3	0	Fully Receipted
iquid soup canned Ch	icken 400g										
4195M		12/01/2024	12/01/2024	ABBOTT LABS	SERIAL (GTIN: 74625364		Box	5	2	3	Marked Complete
orting failure in zero-le eorganizable with sub- ar on all combobox in loud mode and portab node selection. Make M	ot working in cloud mode ength column mode seler menu by modifying shor abc This is extra inform le mode issue. Fix sortin facto & Run menu reorg I. Add vertical scroll bar	ction.Make Mac touts.xml. Add v ation - Fix them ig failure in zero janizable with su	ro & Run menu vertical scroll e not working in -length column								
4195M			12/01/2024	BOSTON SCIENTIFIC	SERIALBAT	MPCSERIALB/	Roy	5	2	2	Marked

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.

										IPPIY Chain
AJP123 - Hollows Res	spite Care Unit								NH3 30	ipply chain
103025 - PRIORY WAP Priory - Priory Ward	•	03053928)								
				Shelf life						
IPC MPC xpiry status - Red AR315	eClass	Group key	Expiry date	warning	Consign	Qty	Unit cost	Total value	Batch ref	Serial num
old Beverages Cordials Bla ight 600ml AR315	ackcurrar		31/01/2013	5	Ν	2	37.16	6.19	123rty	
old Beverages Cordials Bla ight 600ml	ackcurrar		28/02/2013	5	Ν	4	37.16	12.39	123rty	
xpiry status - Red								18.58		
31.72% value % of tota 23.08% quantity % of t										
xpiry status - Amber										
RODUCT789 emonade - no sugar GTIN: 58967415896239)	AAD Supplier123		28/02/2018	28	Ν	10	2.00	20.00		
xpiry status - Amber								20.00		
34.14% value % of tota 38.46% quantity % of t										
xpiry status - Green RODUCT789										
RODUC1789 emonade - no sugar GTIN: 58967415896239)	AAD Supplier123		21/03/2018	28	Ν	10	2.00	20.00		
xpiry status - Green								20.00		
34.14% value % of tota 38.46% quantity % of t										
products for 103025 - PR	IORY WARD [34]							58.58		
products in total								58.58		

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**.

			EDC - Sto	ck locator report			NHS
100001	1 - CASTL		re Unit (GLN: 6785643256765)			NHS Sup	ply Chaiı
	- Castle V		Stock quantity Locations	Group key	Serial number	Batch reference	Expiry
	03727 4267402348) ages Juice Drin	Stock	1 Castle Ward			E31331S123	31/12/2020
AAR302 (GTIN: 5054	03727 4267402348)	Stock	1 Castle Ward urrant Light 500ml - PET bottle			E31331S133	31/12/2019
ABX014	BCK2	Stock	0,000 Shared Castle Store, Castle Catering S cold drink for dysphagia sufferers on stage 2 (custard) fluids.		a blackcurrant flavouring and	l thickener.	
HHH023 Test Kit One	OVMID20 e step ovulation	Stock prediction midstream	6 Castle Ward n test strips / HLH diagnostic kit tests individually foiled - 20m	U/ml - 50 tests			
HHH050 Test Strips (One step Metha	Stock adone (MTD) single p	4 Castle Ward			_	

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.

							EDC - Sto	ck sta	atus		NULC
	- Hollows Re	•									NHS
	CASTLE WA	ARD [52] (G			6765)	0	0.5				NHS Supply Chain
NPC	MPC	Eclass	Qty	Qty on order	Value (£)	Qty owned	Qty consigned	ROL	Batch ref	Serial number	Expiry date Group key
	03727 4267402348)	AAB	4	0	41.64	4	0	2	2		
Cold Bevera	ages Juice Drink	s PET Bottle B	Blackcum	ant Light 5		ottle			16.15-5		24/42/2042
			1		10.41 10.41				dfdfaf dfdfaf	ace def323	31/12/2012 31/12/2012
			1		10.41				E31331S123	ABC123	31/12/2012
			1		10.41				E31331S123	CDE123	31/12/2012
ABX014	BCK2	AZB	5,999	0	0.00	5,995	4	1	I		
Dysphagia o	drink Just add w	ater - pre-thick	kened col	d drink for	dysphagia su	Ifferers o	on stage 2 (cus	stard) f	luids. it is supplied in	a beige cup containing	a blackcurrant flavouring and thic
HHH023	OVMID20	HHB	6	0	0.00	0	6	0)		
Test Kit One	e step ovulation	prediction mid	stream te	st strips /	HLH diagnost	ic kit test	ts individually	foiled -	20mU/ml - 50 tests		
HHH050			4	0	0.00	0	4	0)		
		done (MTD) si									

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.

							ansaction	•							Ν	HS
0000	1 - CAS	TLE W	spite Care U ARD [52] (Gl		643256765)									NHS	Supply (Chain
pastie IPC	- Castle		Trans type	UOM	Supplier	Serial	Batch	Local ref	Expiry date	Qty	Unit cost (£)	Value (£)	Cnsg	Date	Transacted by	Product type
AR302 GTIN: 50	03727)5426740234	AAB 18)	ReturnToSupplier	Case	LUCOZADE RIBENA SUNTORY	343	B123	Expired	28/02/18	1	10.41	10.41	N	08/02/18	Alison Peck	Stock
old Beve	erages Juice	Drinks PE	T Bottle Blackcurr	ant Light 500	ml - PET bottle											
AR302 GTIN: 50	03727)5426740234	AAB I8)	ReturnToSupplier	Case	LUCOZADE RIBENA SUNTORY	3	B123	Expired	28/02/18	1	10.41	10.41	N	08/02/18	Alison Peck	Stock
old Beve	erages Juice	Drinks PE	T Bottle Blackcurr	ant Light 500	ml - PET bottle											
	03727	AAB	ReturnToSupplier	0	LUCOZADE RIBENA	345	B123	Expired	28/02/18	1	10.41	10.41	N	08/02/18	Alison Peck	Stock

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.

Selection criteria		
Fransaction type		All
IPC	0	
МРС	0	
class	0	
Batch reference	0	
Serial number	0	
ransaction created from	0	
ransaction created to	0	

Click **Generate** to create the report in PDF format, or **Export** to obtain the information in a format suitable for opening in a spreadsheet.