Electronic Demand Capture (incorporating eDC Gold)

Guidance Notes

Version 4.9

Contents

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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 ⊗
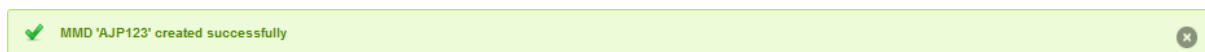
- Notification messages are in yellow:

> ⚠ 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 ⊗
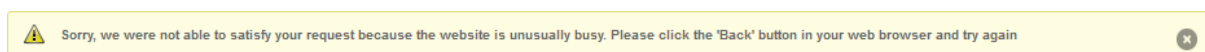
- Information messages are in blue:

> ⓘ Changes to tracking attributes are not allowed while you have stock on hand
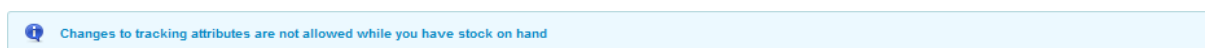
- Failure messages are in red:

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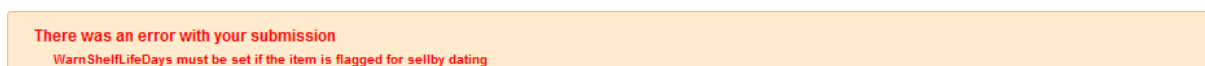
Required information

Labels in red mean that the information in that field is required. You cannot save your changes if 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.

- The screenshots in this document are taken from the MC 7090. There are some differences between this and the other supported PDA – the MC 55a – and the general differences are highlighted in 'Screen layout differences' on page 15 and 15. Where the differences are significant, these are shown in the relevant sections.

eDC Gold information

- Where sections are *only* applicable 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.

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> If any instructions in a section not specifically associated with eDC Gold have an effect on the eDC Gold version of the application, these are highlighted in notes that look 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
MSL	Maximum Stock Level
NPC	National Product Code
PDA	Personal Digital Assistant
PLIC	Patient Level Information and Costing
ROL	Reorder level
ROQ	Reorder quantity
UOI	Unit of issue
UOM	Unit of measure
VLT	Variable Lead Time – where the lead time differs from the standard 48 hours (applies to Blue Diamond orders only)

Icons used with the eDC application

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

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Part 1: Overview

These guidance notes are written for people using PDAs (Personal Digital Assistants) 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:
  - Changes to the eDC applications are highlighted on page 11, with links to the pages in this document containing information about the changes.
  - Significant changes to the eDC documentation itself are also highlighted.
- Part 2 (starting on page 8) explains how to access the eDC web application.
- Part 3 (starting on page 24) describes configuring eDC using the web application.
- Part 4 (starting on page 84) gives instructions for logging on to the PDA.
- Part 5 (starting on page 103) tells you how to update the information held on the PDA.
- Part 6 (starting on page 136) covers day-to-day use of a PDA to capture demand and generate orders.
- Part 7 (starting on page 161) looks at using 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 point in 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 PDA 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 being in a brighter colour, with the rest having the 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 96.
- Using the PDA to manage stock in stores is explained in 'Managing stock levels and movements on the PDA (G)' on page 118.
- Using the web application to manage stock is explained in 'Managing stock levels and movements (G)' on page 149.

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

Some of the changes in eDC are available to all. Others are only available if you subscribe to eDC Gold – the enhanced version of eDC.

- You can now choose whether to display the NPC, MPC or GTIN product code. (Only NPC is available if the stock catalogue is not loaded.)

  Whichever option is selected is used throughout the PDA when a product code is shown, and the label associated with the product indicates the type of code it is (NPC, MPC or GTIN).

  For information on setting the preference for a PDA, see 'Specifying which product code to display' on page 89.

- Both Req Point codes and GLNs are shown whenever a requisition point is displayed. GLNs – when available – are shown in brackets following the requisition point code.

Images from PDAs are taken from different models, depending on what is available at the time the document is updated. The eDC application functions in exactly the same way in all models but the appearance (colour scheme, buttons and size of menus) varies.

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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 PDAs 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, as well as maintain details of the requisition points using the system. It is also used to resolve any conflicts, and to generate orders if manual intervention is required.

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

What is eDC Gold? (G)

eDC Gold consists of all of 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, and it improves communication between these areas and the procurement departments.

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

Communications and networking

There are two options for connecting a PDA. Your local IT department's assistance will be required for either set-up.

- The PDA can connect directly to your local network. The benefits of this are:
  - Fast uploads
  - Automatic software updates
  - Downloadable NHS Supply Chain catalogue and requirements
  - No need to be logged into the system to upload or download data.

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- You can use a USB connection where direct connection is not possible.

  To use a USB connection, you need to use Windows Mobile Device Centre.

  If you are using Windows XP or earlier, Windows Mobile Device Centre is not available. Instead, Microsoft ActiveSync (a free download from Microsoft's web site) must be installed on your PC.

Support and training

The PDA rollout programme provides full training for organisations using this new technology, and your NHS Supply Chain IT Helpdesk provides support.

If you would like more information about our eDC service or have suggestions for further improvement, please contact your local Account Manager or log a call with the IT Help Desk (phone 0845 6804357 or email CSHelpdesk@supplychain.nhs.uk).

How eDC works

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

If you are using eDC Gold, download store details regularly as well.

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

A PDA is used to capture 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 required stock levels and orders are automatically created 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 26). Automatic adjustments to order quantities can also be specified to obtain the best possible price while ensuring constraints such as available space are respected.

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.

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Supported devices

The following devices are currently supported by eDC.

Motorola MC 7090

LEDs

Touch screen

On/off button

Left scan/
action button

Right scan/
action button

SD card slot

Centre scan/
action button

Keypad

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Motorola MC 55a

LEDs

Touch screen

Left scan/
action button

Right scan/
action button

Centre scan/
action button

SD card slot is under the
battery

On/off button

Keypad

Screen layout differences

Images from PDAs are taken from different models, depending on what is available at the time the document is updated. Most of the screenshots in this document are based on the Motorola MC 7090. The eDC application functions in exactly the same way in all models but the appearance (colour scheme, buttons and size of menus) varies.

Where differences between the models may make the instructions unclear or ambiguous, the differences have been highlighted in the following sections.

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Start menu

The Start menu is in the bottom left corner of the screen on the MC55a. The options available from the Start menu are displayed as icons on the screen. Scroll through them to find the eDC icon (shown on the right, below).

The location of the OK button

The OK option, used to close the current screen and move up a level in the hierarchy of screen, is in a different location. For comparison, the same screen is shown below on the MC 7090 (on the left) and on the MC 55a (on the right).
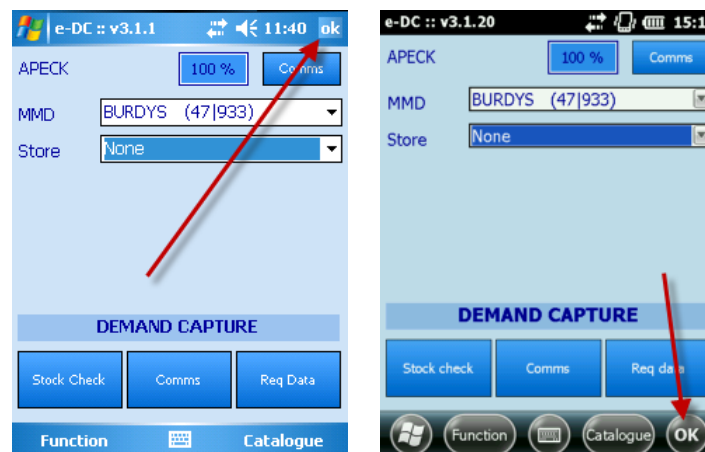
The Function menu

The options on the Function menu are the same but look different.

- On the MC 7090, all of the options are immediately visible.
- On the MC 55a, you may need to use the arrows at the top and bottom of the list of menu items to find the one you want.

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The function menu options on the MC55a are shown below.
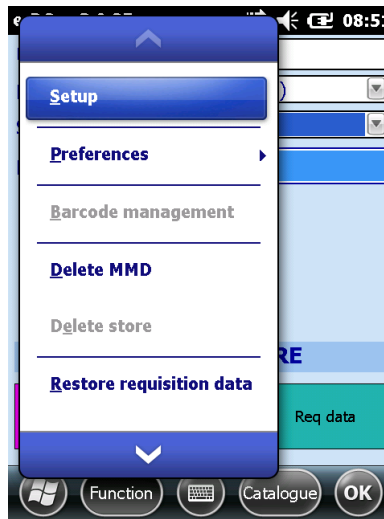
Delete Store is only available if you are using eDC Gold.

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Part 2:   Logging on to the web application

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

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

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.

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Logging on to the eDC web application

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

To log on to the eDC web application:

1 Connect to NHSNet through your local network.

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

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

3 In the blue menu bar towards the top of the page, click on My Supply Chain

4 Click on eDC log in to go straight to the eDC login page (see page 20).

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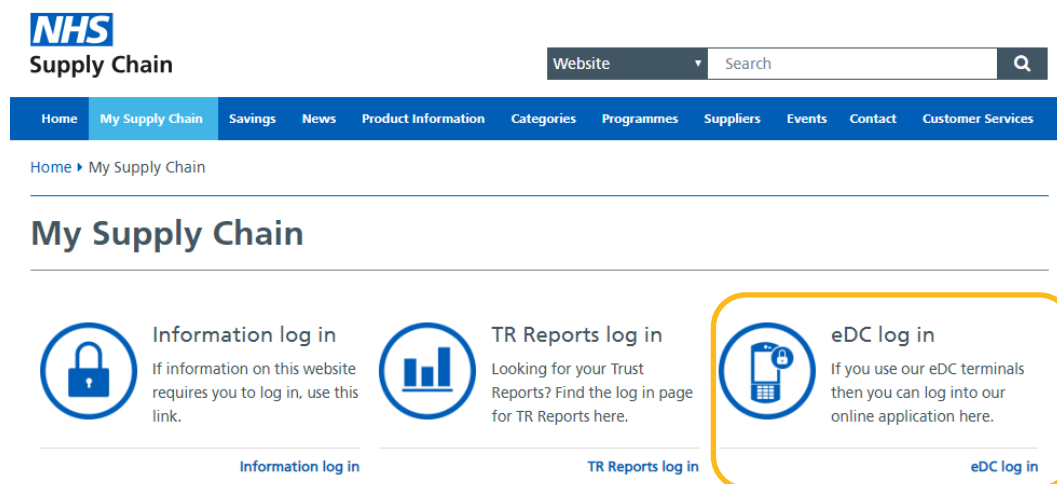
The 'My Supply Chain' page

The My Supply Chain page contains links to a lot of relevant and useful information. From here, you can access the application areas (Online Catalogue and Ordering, eDC, Home Delivery and Billing) and can also find 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 of the applications.

Accessing eDC

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

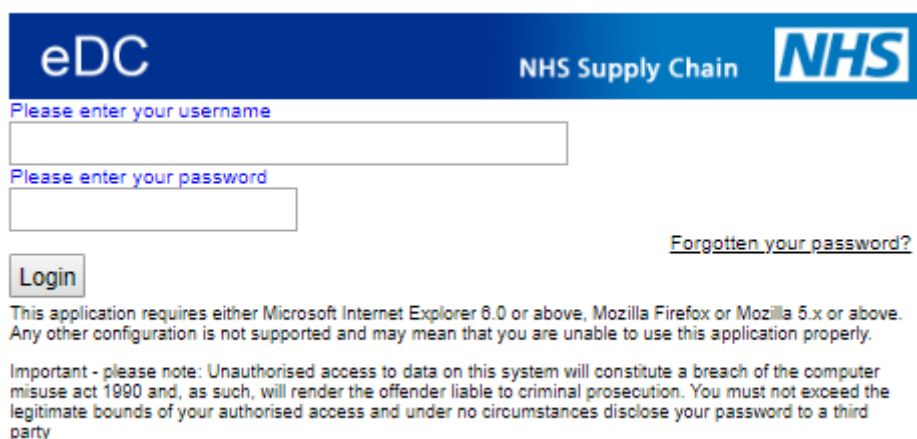If you already have a login and password for another application – such as Online Ordering or Home Delivery Service – this will be updated to include the eDC roles that you need.

You must read the information below the Login button carefully. Details of the browsers that are supported may change as the system is updated. Information about unauthorised access is a serious reminder of the requirement to keep your password confidential.

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.

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Forgotten your password?

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

3   Type your username and your email address into the boxes.

4   Click Send password.
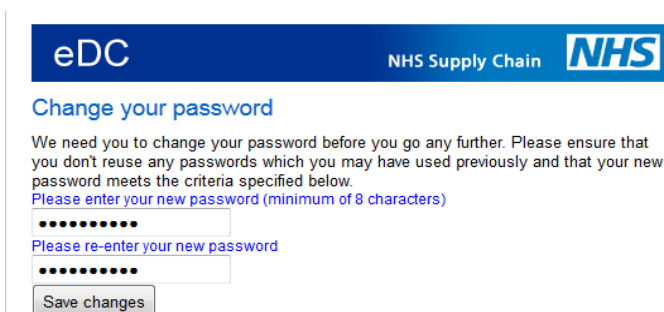
A new temporary password is sent to you by email. You have to change your password the first time you logon.

You have to give the email address that is stored as part of your Supply Chain user record. The system checks that the email addresses match before resetting your password and sending the 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 Supply Chain web applications and for the PDA.

The PDA checks for password changes when you upload information. You can use either the new or the old password to access the PDA after an upload, but must download MMD details as soon as possible to synchronise the passwords. From that point on, you can only use the new password.

5   Type your new password into both boxes.

6   Click Save changes.

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

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When you click Save changes, a message may appear asking if you want Windows to remember your password. Select Don't offer to remember any more passwords, and then click No – *this is very important for security reasons.*

Selecting your location (MMD)

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

7 Select the Warehouse (depot) that serves you from the drop down list.

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

8 Select your MMD from the list.

You can type part of the name of the MMD in the Criteria box to reduce the number of MMDs shown.
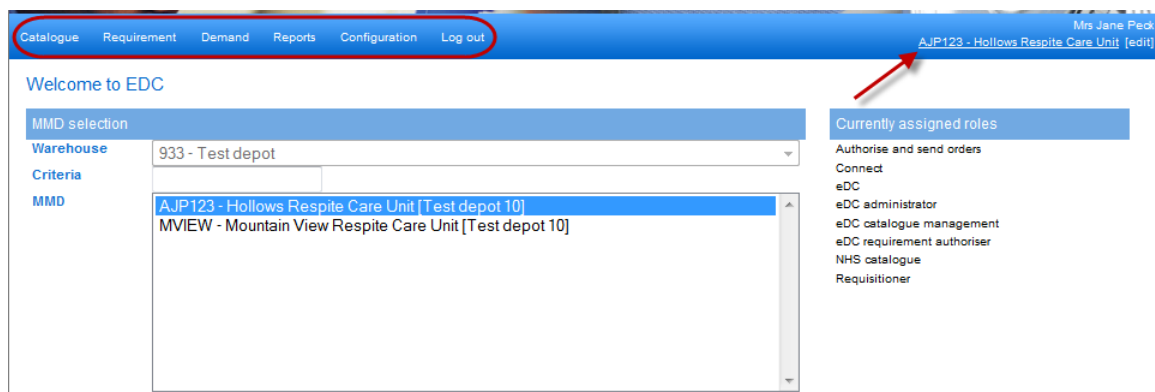
The chosen MMD is displayed in the right side of the blue menu bar – you can change it by clicking edit to the right of the MMD name.
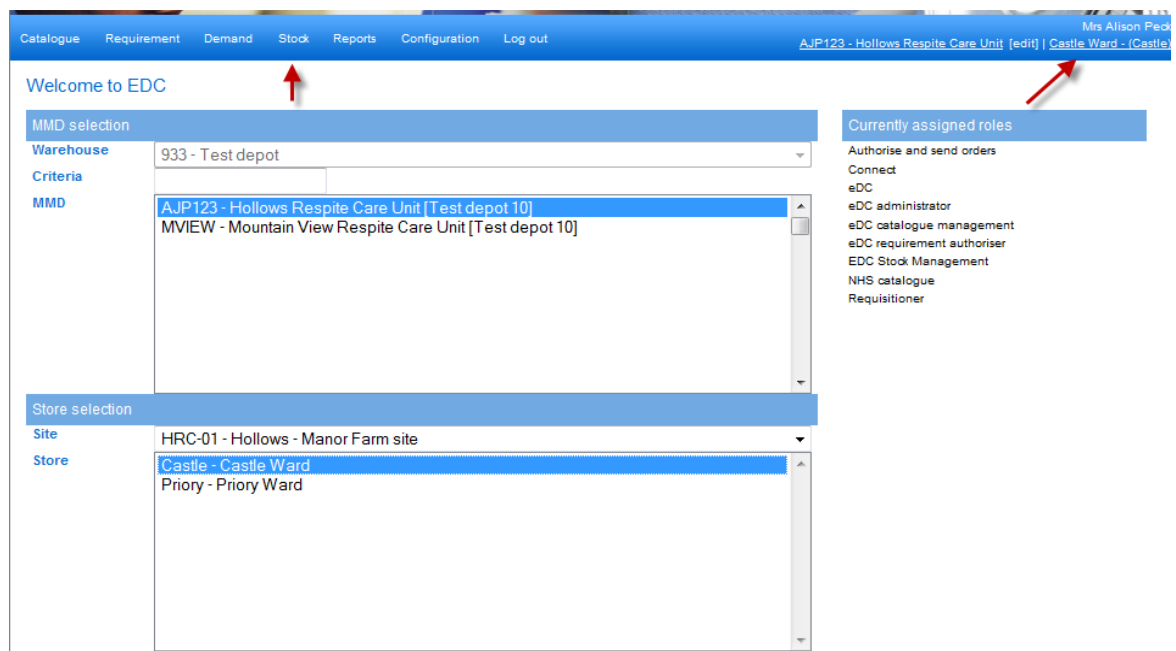
The other options in the blue menu bar are now available – the ones available to you depend on your currently assigned roles, which are also displayed on the right side of the page.

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Selecting a site and store (optional) (G)

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

You *must* select a Site and a Store if you want to track stock levels and locations during this session but do not need to do this if you are not intending to do these things.

If you do select a Site and a Store, the Stock menu is displayed among the other menu options, and the store is shown on the far right of the blue bar.

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

Logging off from the web application

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

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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 25)

- Manage non stock products, placing them in a local catalogue to make them available for ordering (see page 35)

- Create and manage external locations, required when using eDC with your local systems (see page 44)

- Specify requirements – the products and stock levels required for each requisition point (see page 49)

- 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 PDA until they have been downloaded to it.

Adding a new MMD

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

9   From the Configuration option on the blue menu bar, select MMD Configuration.
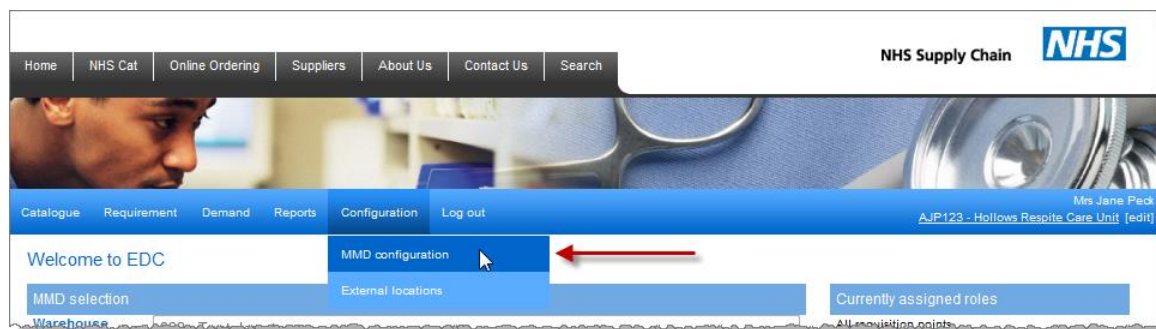
A list of all the MMDs you can access is shown. Any inactive MMDs are shown in red.
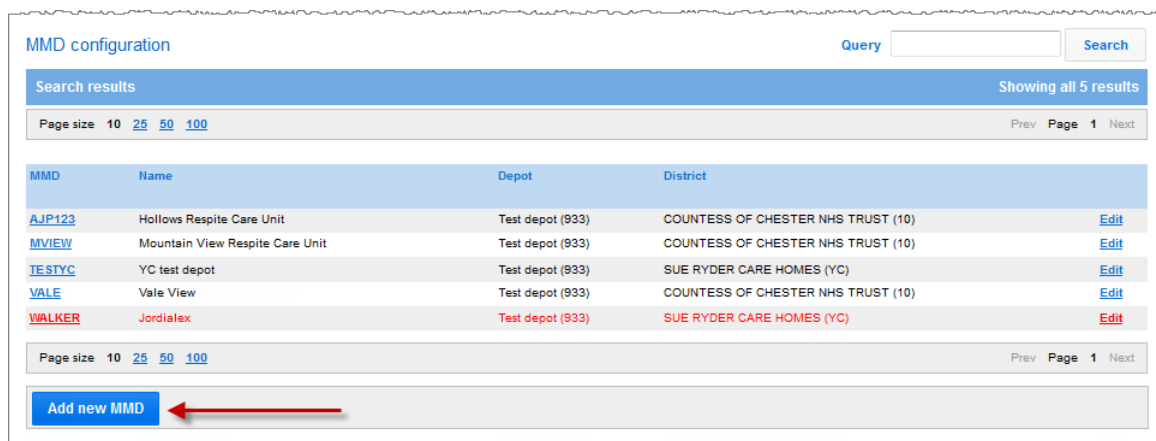
10   Click Add new MMD and the Add a new MMD page opens.

11   Complete the MMD details section following the guidelines below:

- MMD short name is a six character name used to identify the MMD on the PDA. It must be unique.

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

- Depot defaults to the depot associated with your current MMD (the one you chose when you logged on). If a different depot will service this MMD, select it from the drop down list.

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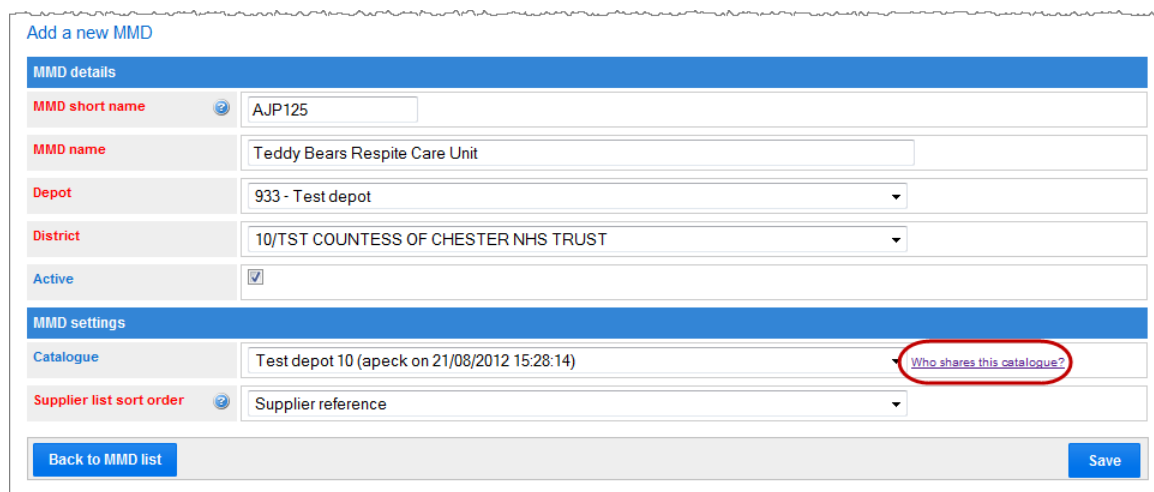
- District is the organisation associated with this MMD. This automatically defaults to the organisation associated with your current MMD, but you can select any organisation that you can access.

- Active indicates that the MMD is currently in use.

12 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.

Information on managing your local catalogue is in 'Managing non stock products', which begins on page 35.

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

14 Click Save to save your changes.

You are automatically logged on to this MMD when it is saved (as shown by the MMD identifier in 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 a catalogue with another MMD, requisition points can be moved from that MMD to this one.

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

To associate an available requisition point with this MMD:

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

The Add a new requisition point definition page opens.

16 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 are *created* in the Online Catalogue web application.

17 Select the Replenishment method you want to use (see 'Replenishment methods' at the top of page 28).

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NHS Supply Chain

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

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.

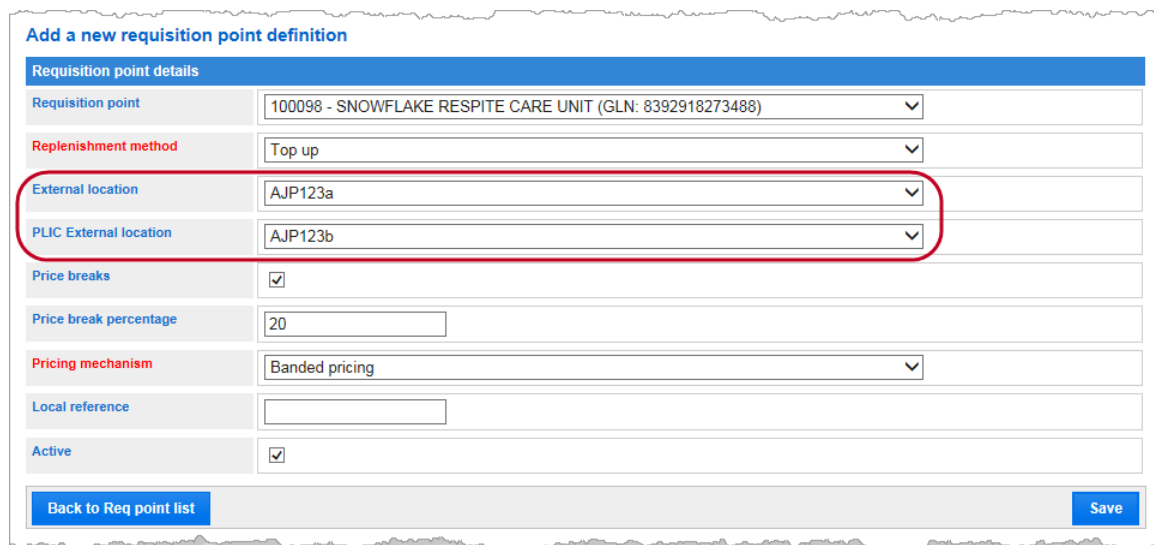This option ensures you are always fully stocked without manual intervention.

■ Automatic

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 *can* be set for each product – but these are not mandatory. 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.

Add a new requisition point definition

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

Back to Req point list   Save

---

18 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 44.

> An external location *must* be specified if you want orders from the local catalogue to be auto-processed. 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 47.

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

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> **Pricing mechanism**
>
> Some products are priced to give discounts for buying in bulk. For example:
>
> - Cost for 1 of the product: £2
> - If you buy 10 of the product in a single transaction: £1.80 each
> - If you buy 15 of the product in a single transaction: £1.50 each
>
> The pricing mechanism determines how the total cost is calculated.
>
> - Plateau pricing simply multiplies the number ordered by the price for buying *at least* the number forming a price break.
>
>   Continuing the example above, ordering 16 of the product will cost 16 × £1.50 and ordering 12 of the product will cost 12 × £1.80.
>
> - Banded pricing works by breaking the quantity ordered into bands.
>
>   In this case, ordering 16 of the product will cost 15 × 1.50 plus 1 × £2 and ordering 12 of the product will be charged at 10 × 1.80 plus 2 × 2.

If you select this option, a Price breaks percentage box appears. 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 next 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 next price band is 10, the system will order 7 as an increase to 10 is greater than 25%.

20 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 29.

21 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.

22 Select Active to make this requisition point available for use.

23 Click Save.

Details of the requisition point are shown.

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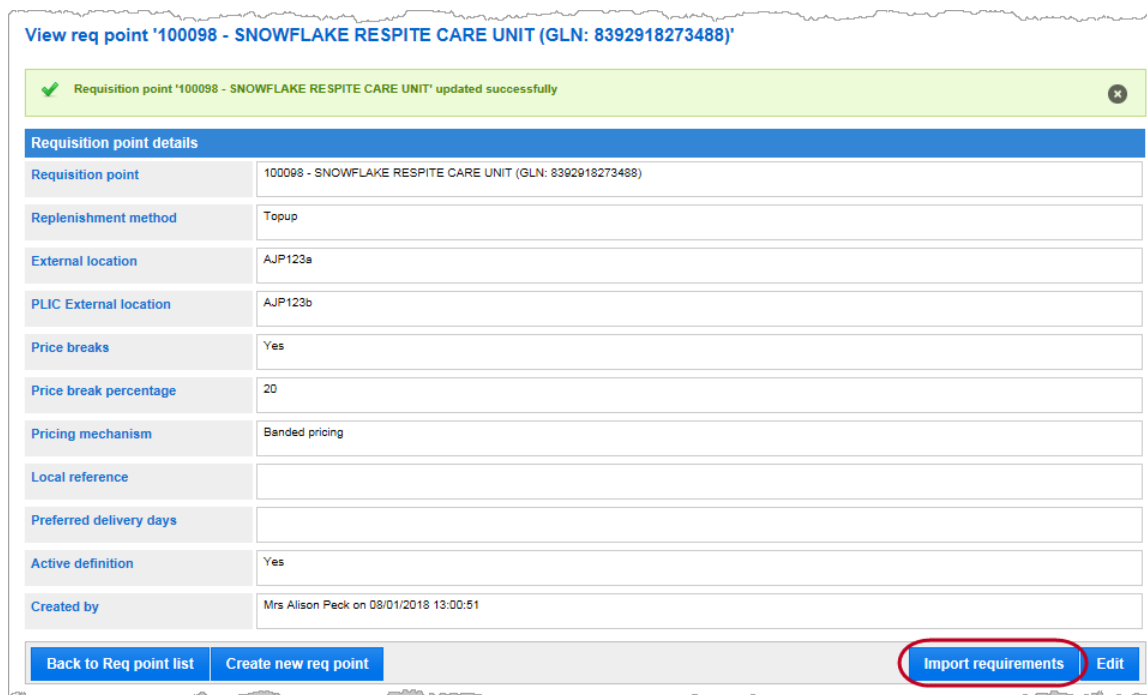- If you want to import (copy) a requirements list from another requisition point to this requisition point, you can do so at this point.

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Import requirements

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

When you have found the correct page, click Import Requirements at the bottom right of the page.

A box opens in the middle of the web page. Select the Source MMD and Source requisition point from the drop down lists and click Import.

A message confirms how many requirements have been copied across.

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

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Click the X in the corner to close the box.

Editing MMDs

Changes made to MMDs are not available to a PDA until they have been downloaded.

24 Select the MMD to edit. To do this you can either:

- Select the MMD from the Home page and then click Edit to the right of the MMD name in the menu bar.
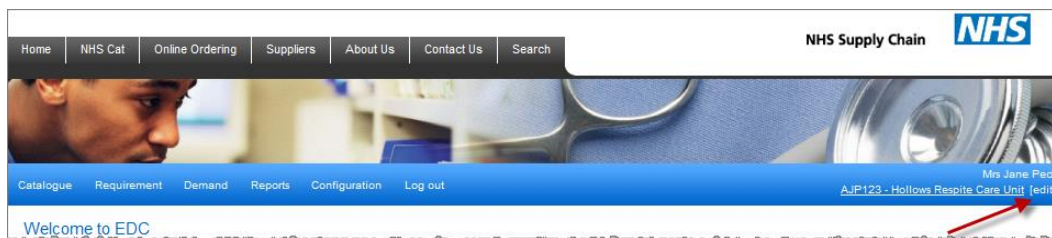
- Select Configuration and then MMD configuration from the menu.
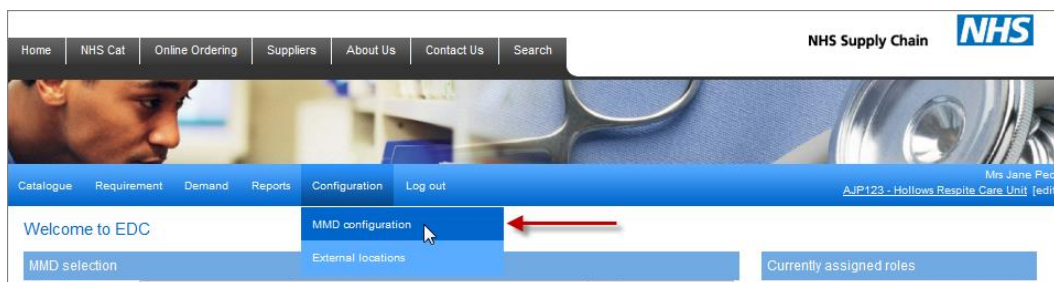
A list of MMDs is displayed. Find the one you want to edit and click the Edit link on the right of the row containing it.
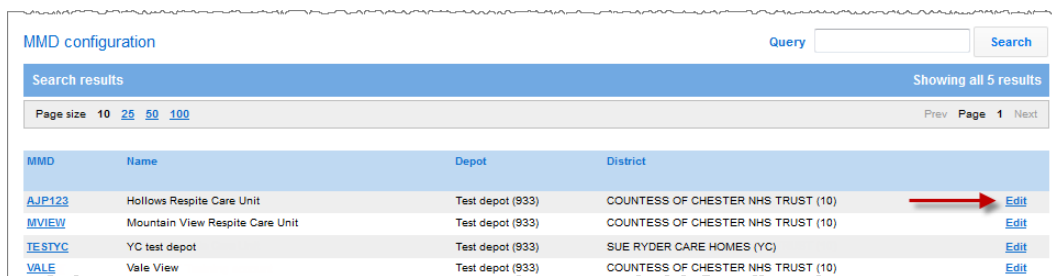
Selecting an MMD to edit from this page breaks your association with the MMD you chose at log on.

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

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

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31
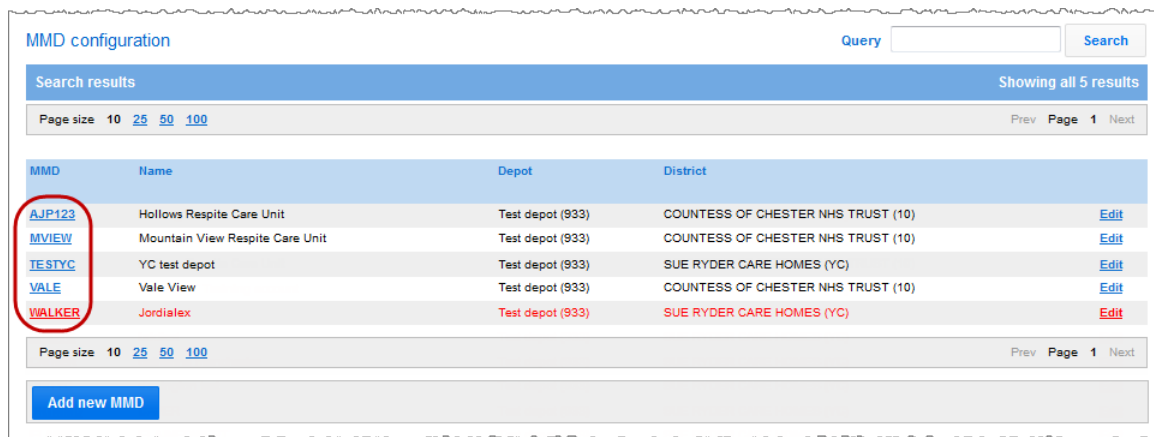
26 Make any necessary changes and click Save.

Editing requisition point details

To change requisition point details:

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

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

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.

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

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

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30 Make required changes and click Save.

The Save button is not enabled until you make a change and move on. In the example above, a Local reference was added but Save was not enabled until that field was left (another field was selected).

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 32.

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31 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.

32 Click Move req points at the bottom of the page.

33 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.

34 Click Move.

The requisition point is now associated with the other MMD.

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Managing non stock products

eDC can be used to manage the ordering of products that are sources from other suppliers (not from NHS Supply Chain). This is done be using a local catalogue, which holds items you can order in addition to those supplied through NHS Supply Chain.

The local catalogue

The local catalogue stores products that your trust uses that are not supplied by NHS Supply Chain. You may have your own local catalogue or may 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 of products shown.
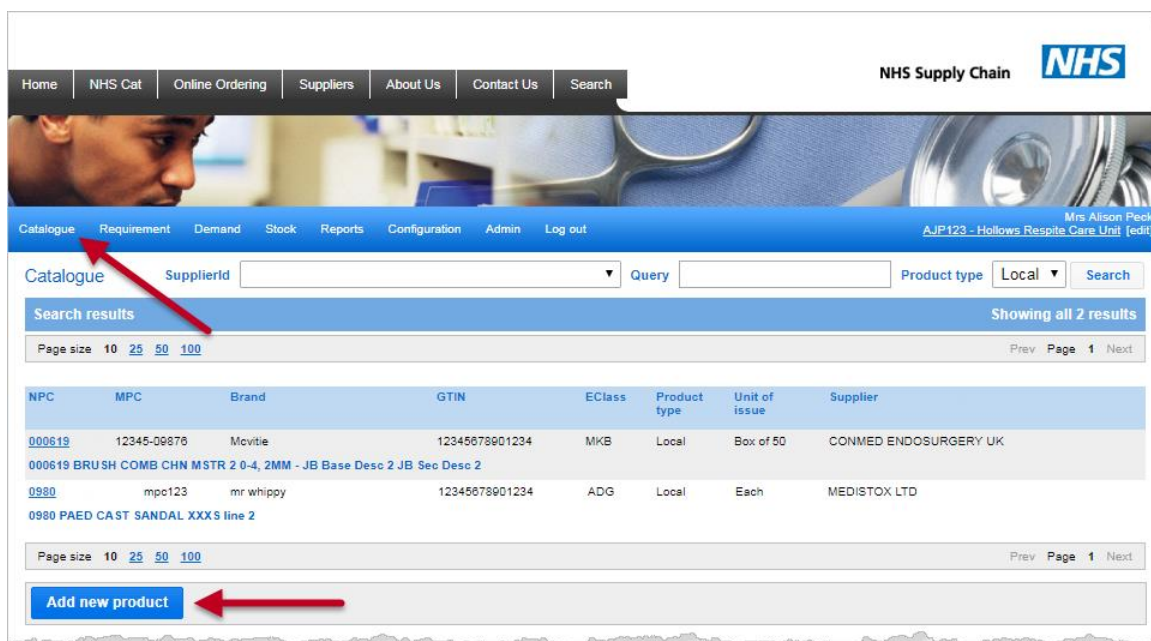
The Add a new product page opens.

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

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

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Add a new product

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

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

Back to catalogue   **Replicate existing product**   Save

2 Complete the rest of the information using the table below as a guide. Mandatory information (fields that must contain an entry) is in red text on 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 then edit before saving. See 'Replicating an existing product' on page 37.

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 further describe the item.
eClass	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. (This was previously called EAN Code but is the same information.)
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

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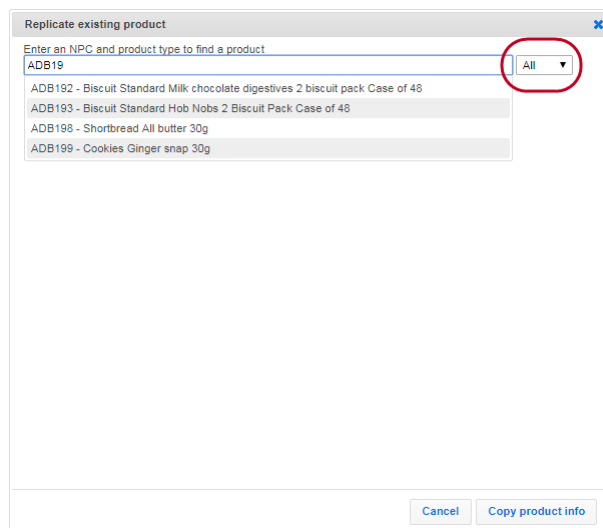
Supplier	Select the supplier from the list. (see 'Supplier maintenance' on page 42 for instructions on adding a supplier to the list).
VAT rate*	This should be set to the correct VAT rate for the product.
Contract reference	Enter if required.
Expense code	Enter if required.
Ad-hoc product	Select this 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 as required to a maximum of 30 characters.
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):

35 Type a code for the new product in Product code.

36 Click Replicate existing product at the bottom of the window.

37 Specify whether you are searching in All products, Stock products or Local products using the drop down list to the right of the search box.

38 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.

39 Select the required product from the list shown.

Details of the selected product are displayed.

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40 If this is the correct product, click Copy product info.

41 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:

42 Select Catalogue from the blue menu bar.

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

44 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 in local products.

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

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46   Click Search.

Amending a product in the local catalogue manually

To amend a product's details:

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

48   Click Edit button.

49   Make the necessary changes and click Save Changes.

Deleting a product from the local catalogue manually

To delete a product details:

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

51   When the product is displayed, click Delete.

52   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 be able 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.

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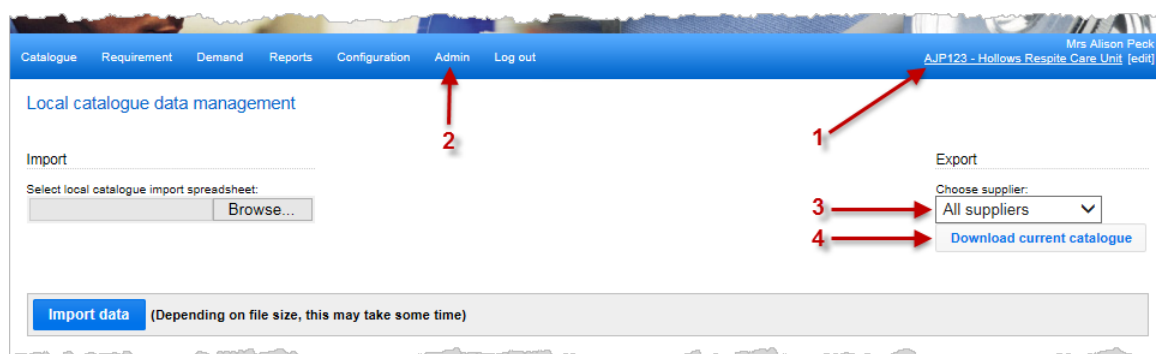
54   From the Admin menu, select EDC local catalogue management.

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

56   Click Download current catalogue.

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

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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 are using Excel 2003, the export uses multiple sheets, each not exceeding 64,000 rows.

Making changes to the local catalogue

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

- 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 – just 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 35 as a guide.

- Amend changes 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 35 as a guide but do not change UID or NPC.

  Rows marked Amend but without changes do not have any effect. They do take time to process, however, so consider deleting them from the spreadsheet for speed.

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

Save the changes made to the spreadsheet.

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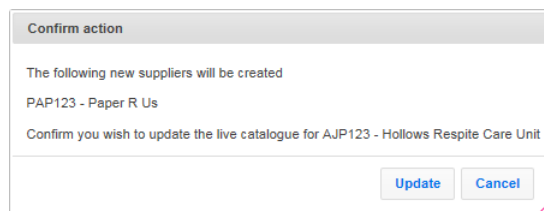
To import the changes:

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 as a result of the update are listed. If these are not required, click Cancel and correct the supplier details.
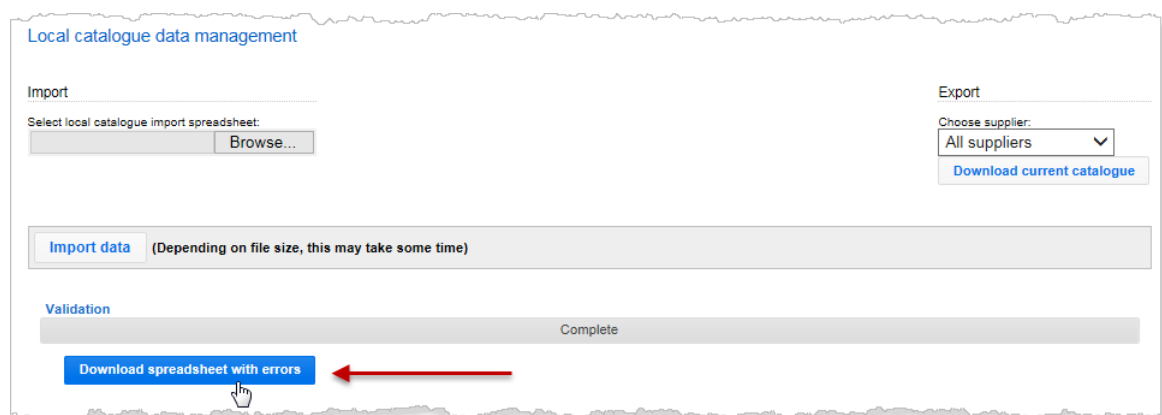
5   Click Update.

Invalid data

If invalid data is found, a message is shown and you are prompted to download a spreadsheet listing the errors.

58   Click OK to acknowledge the message.

59   Click Download spreadsheet with errors.

60   Save or open the spreadsheet.

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

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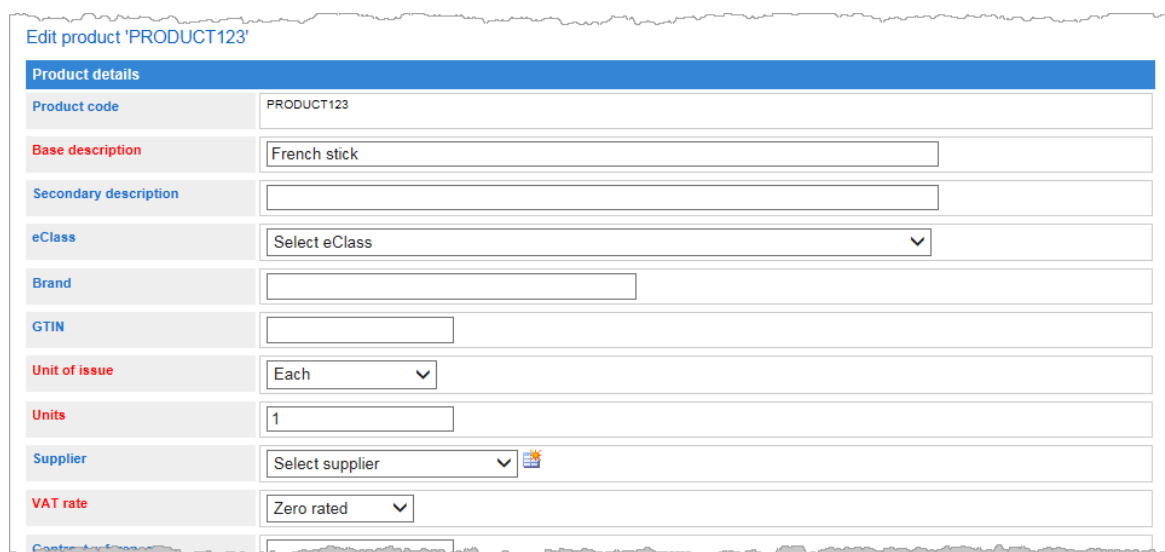
61 Correct the errors, save the spreadsheet and import it again.

Supplier maintenance

New suppliers are added and details for existing suppliers are changed when adding or editing the details for a product.

Adding a supplier

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

2 Click the Add/edit Supplier icon.
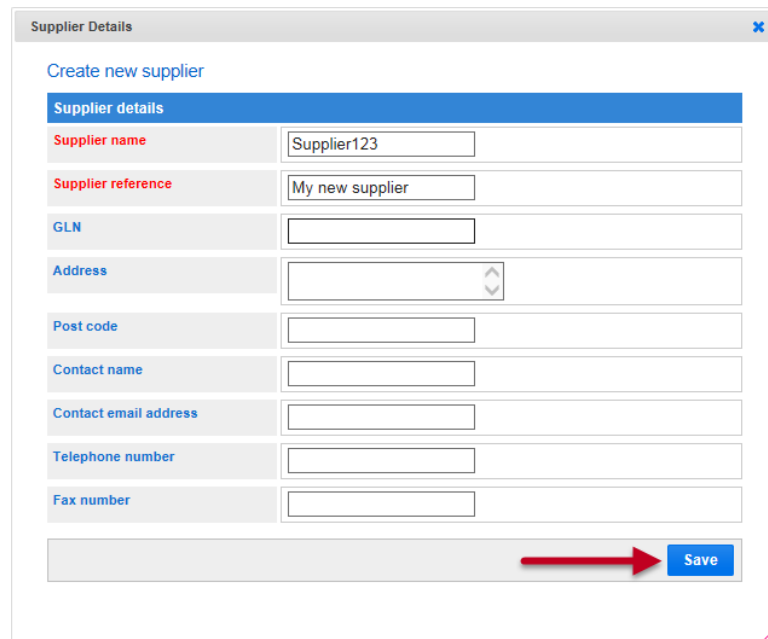
3 The Supplier Details box opens. Complete details for this supplier.

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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.

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Creating external locations to receive information exported from eDC

Information can be exported from eDC if you are using 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 47.

Using eDC with your purchase order system

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

The FTP Server Protocol, IP Address, and Port Number must be provided by your local IT department. You must also agree the Username and Password to be used with them.

NHS Supply Chain will agree the Feed type and Filename with your organisation.

62 From the Configuration menu, select External locations.

Any external locations currently associated with this MMD are shown.

63 Click Add new external location at the bottom of the page.

64 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 that has been 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 is listening for the file.

- Depot and District display the information associated with the MMD you chose when you logged on to eDC. These cannot be changed.

- Feed type – (shown when the Feed category is Purchase order) the format of the feed, which is agreed between the organisation and NHS Supply Chain.

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

- Password and Confirm 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 required suffixes from the drop down list in the order in which they should be appended to the filename.

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

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

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

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

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You need to associate the external location with requisition points for it to be used – see 'Editing requisition point details' on page 32.

For Extended CSV feed types there is a check box to Include NHS Supply Chain sales order number. Once enabled processing demand for external Non-NHS Supply Chain stock will now show the NHS Supply Chain sales order number.
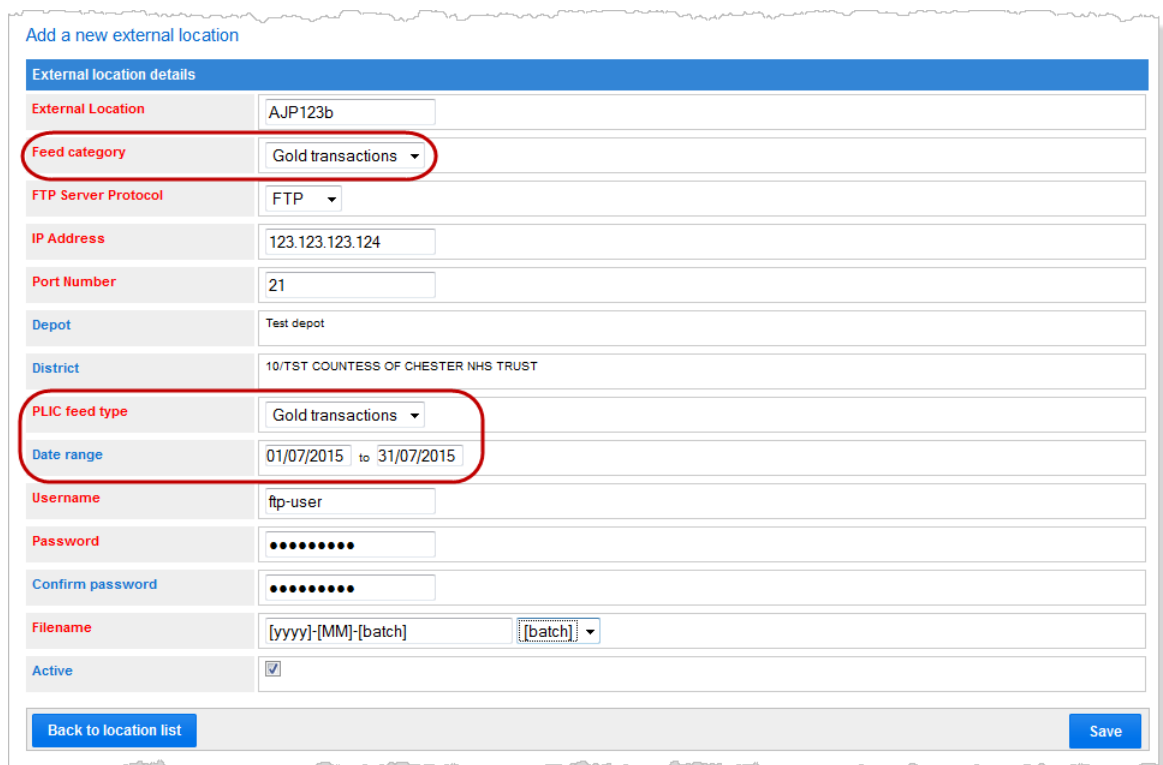
Specifying external locations for PLIC information (G)

If you are 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 44, with the following differences:

6   In Feed category, select Gold transactions.

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

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

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

Amending and deactivating external locations

To amend an external location:

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

67   Click Edit to the right of the location you want to amend.

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External locations within MMD 'AJP123'

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

Add new external location

68 Make your changes and click Save.

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

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Requirements

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

Viewing existing requirements

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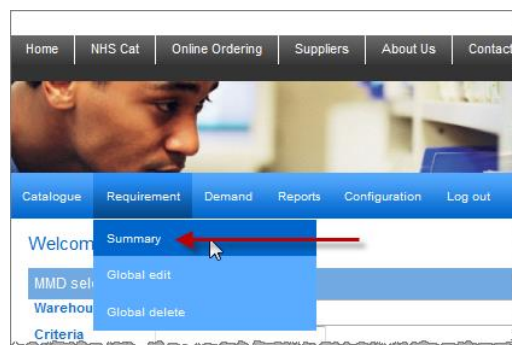
A list of requisition points assigned to the selected MMD is shown. The replenishment method and the number of products recorded as requirements associated with each requisition point are displayed.

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

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

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

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

Requisition points that do not have any associated requirements are excluded from the list unless you select the Display all option and click Filter.

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The currently applied filter is shown at the top left of the page. To return to viewing all requisition points and summary links, click Show all.

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.

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

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

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

   b   Click Create requirement.
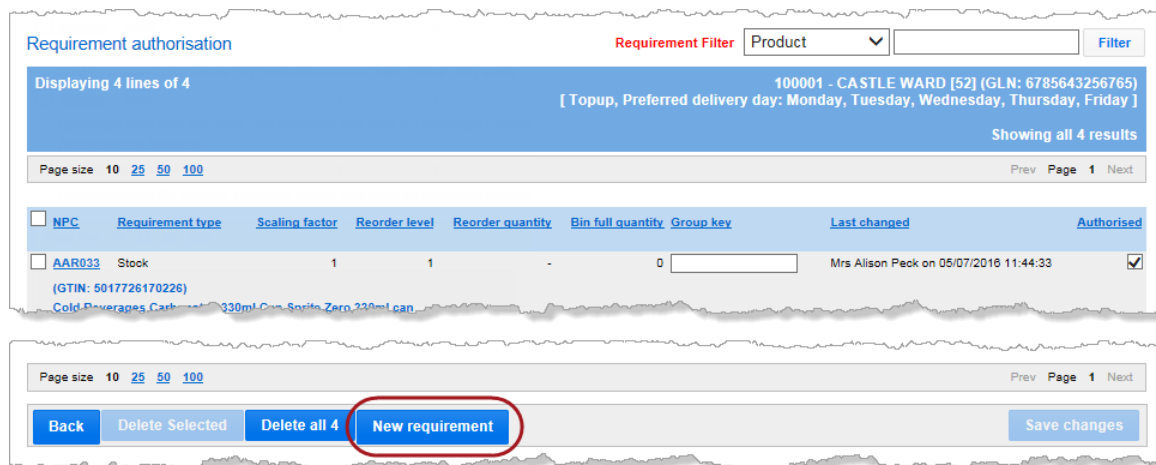
■ To add requirements to a requisition point that already has some associated requirements, click … records in total on the right of that requisition point.

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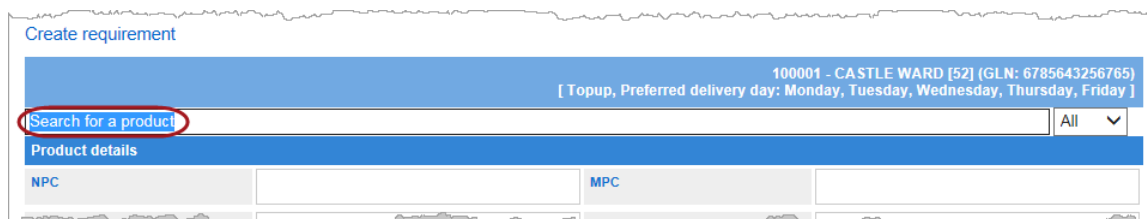
Click New requirement at the bottom of the list of existing requirements.

The Create requirement page opens. The placeholder text 'Search for a product' is selected automatically – type a product code to find a product to add as a requirement.

If you click away from this field, you will need to select or delete the placeholder text before starting to type a product code.
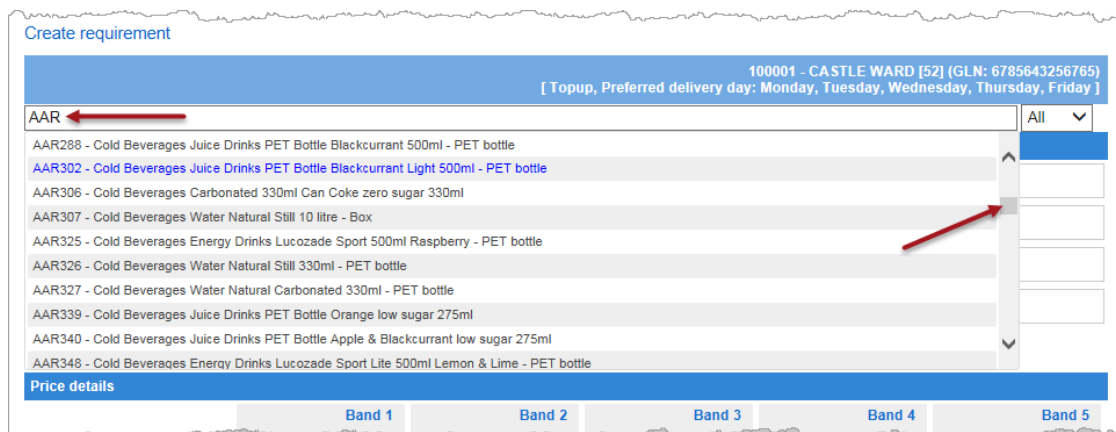
69 Optionally choose to search for Stock or Local products matching the code you are going to type – the example above is searching for All (both stock and local products).

70 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 can also use the wildcard character (%) to represent unspecified characters.

You need to 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 so wide a 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.

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71 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 typed 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.

72 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.

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> **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.

73 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).

74 The options available now depend on the replenishment method you are using – see 'Replenishment methods' on page 28 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 same 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 in 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 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 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.

75 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.

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76 In Group key, type a stock location for the product. This can be up to 15 characters in length; for example, A101 shelf A, row 1, item 1.

77 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.
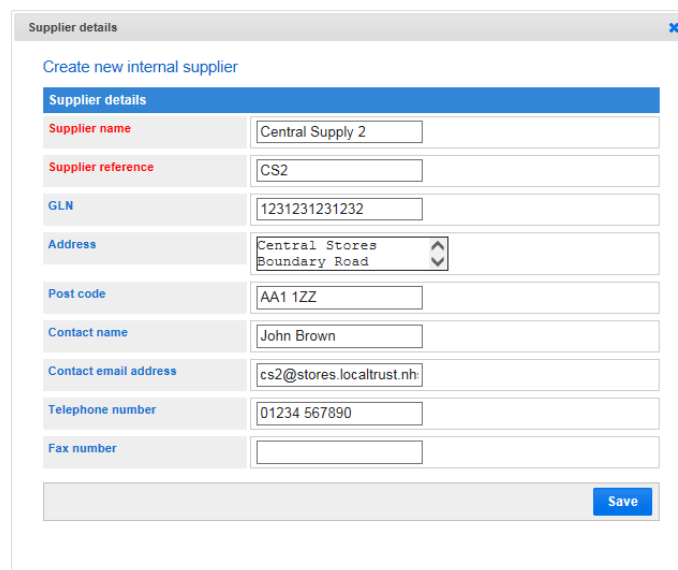
78 Internal item – if a local catalogue item comes from an internal store (for example from CSSD or a linen store), select this option.

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

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

b Complete details for the internal supplier.

c Click Save.

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

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.

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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 break down total number of products into three categories (stock, local and missing).

Local products include both externally and internally supplied products.

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

Click a link to open the Requirement authorisation page – this is the same page from which you access the New Requirement option to add more requirements to a requisition point.
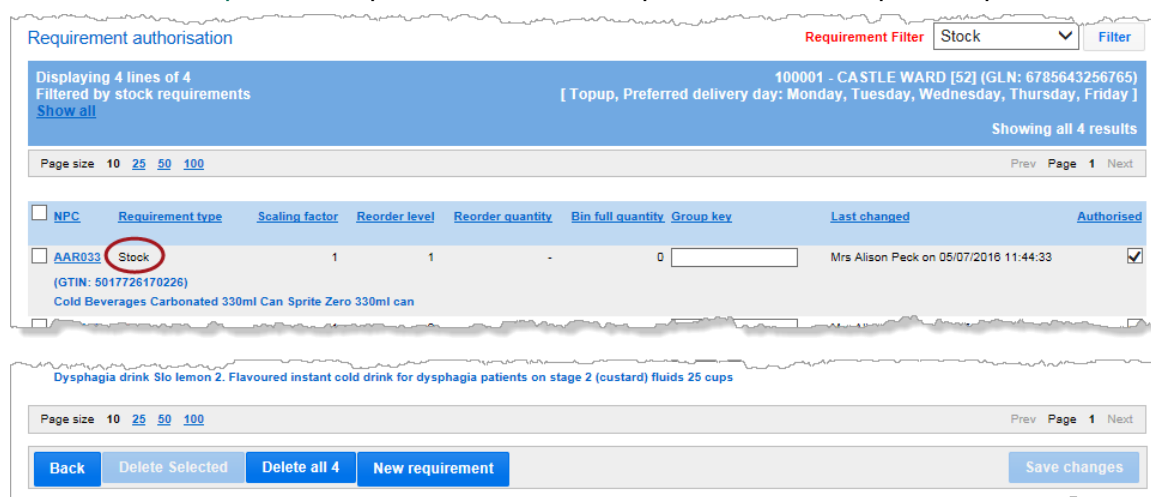
Stock products have a Requirement type of Stock (as shown above). Local products have a Requirement type of either Internal or External.

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Amending existing requirements

80 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.

81 Click Save changes, or click Back to summary to discard the changes you have made.

The Save changes button is disabled until you have make a change.
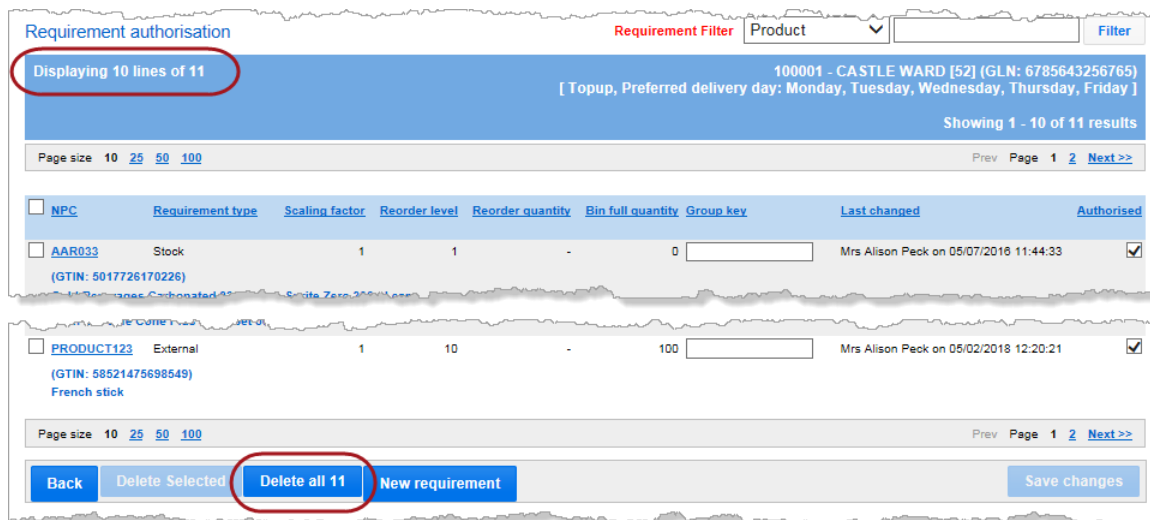
Deleting existing requirements

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.

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Delete all of the requirements

Click Delete all [nn] where [nn] represents the total number of requirements – in the example below, this is 11.

You can only see the requirements that fit on a single page but Delete all [nn] will delete *every* requirement.

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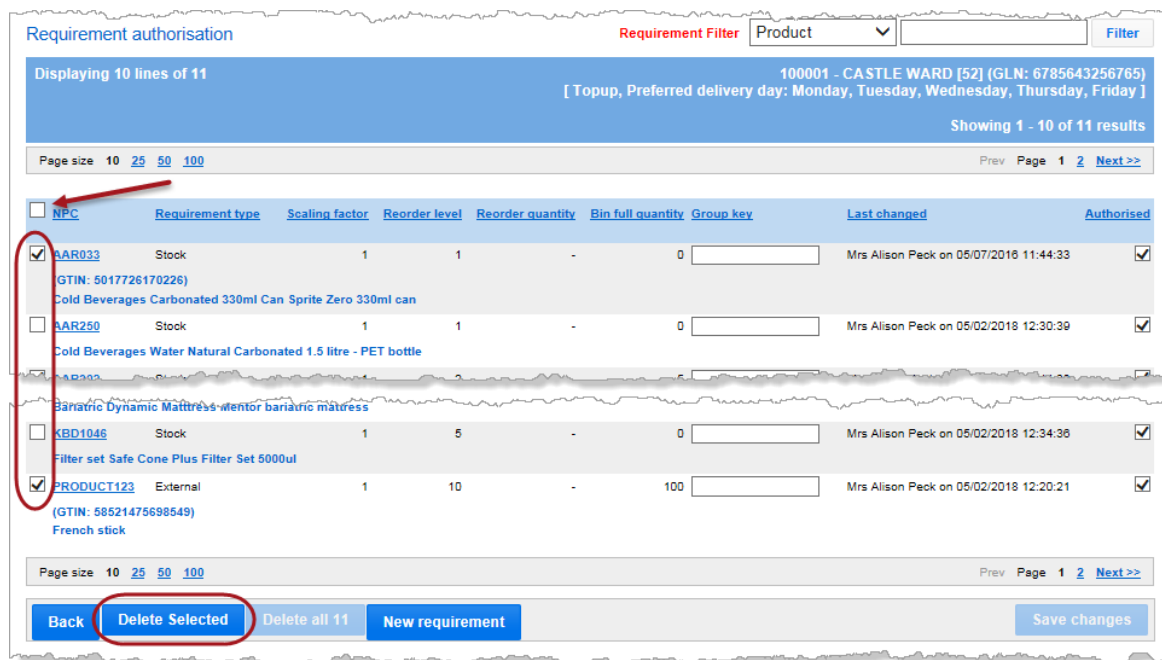
Delete selected requirements

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

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

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

Removing invalid codes

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

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

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

Delete them in the same way as you would delete 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.

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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 to replace multiple products with the same product.
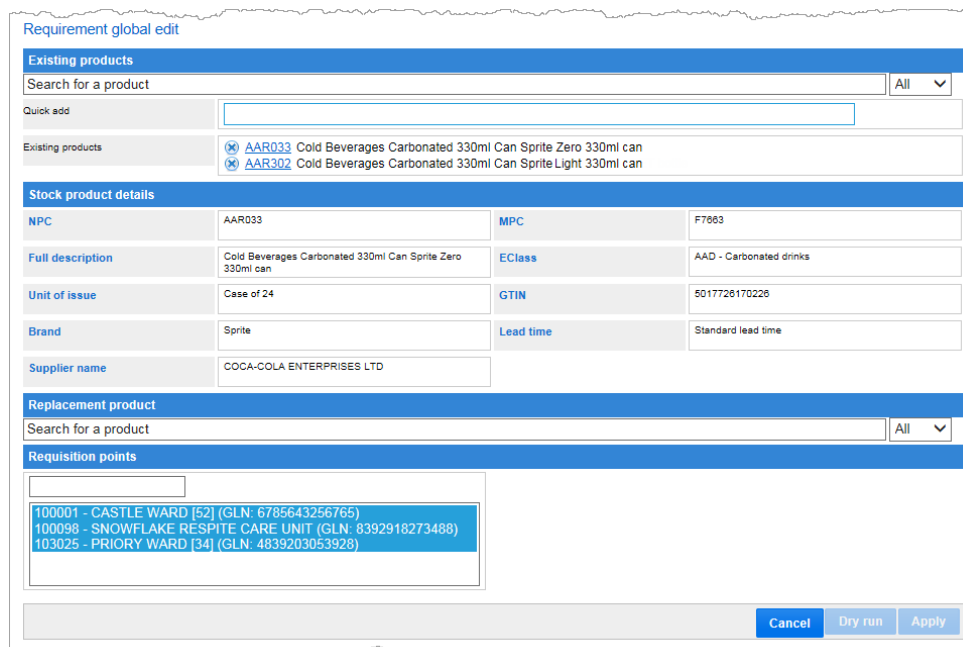
To replace products:

82 Select Requirement and then Global edit from the menu.

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

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

  All the products you select can be replaced with a single product.
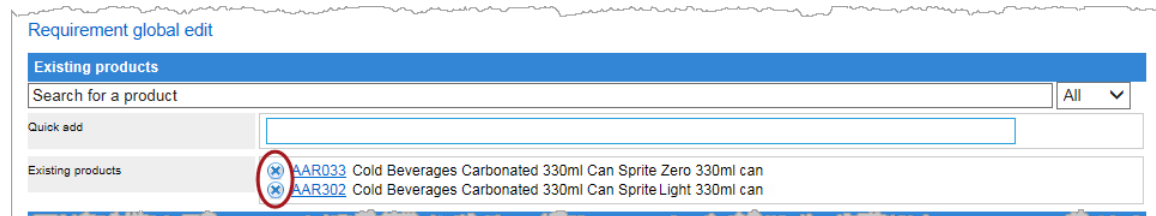
Click or tab to move out of the Quick add box. The product codes you have entered are listed in the Existing products box.

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

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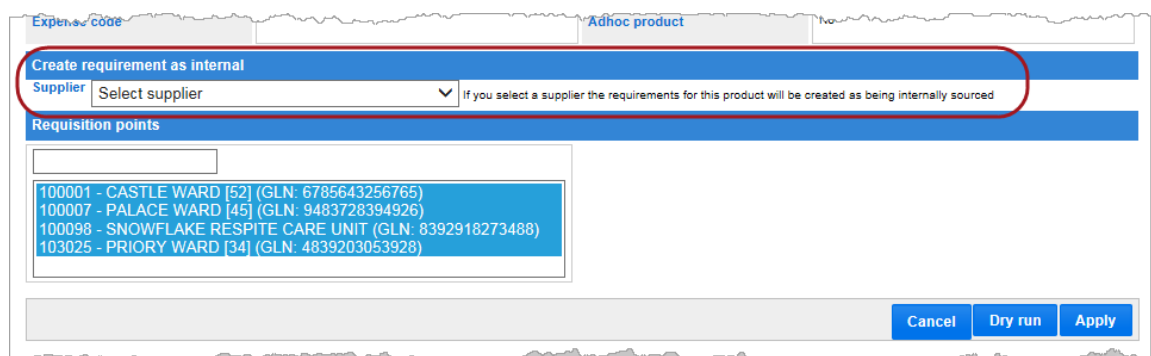
84   You can continue adding products if you want to replace several products with a single alternative. The details displayed in the middle of the page correspond to the product that has just been found (see image above).

- 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.

85   In Replacement product, type or search for the replacement product code.

Product details for this product are displayed.

86   The requisition points that have a requirement for the original product are shown. The change will be made to all requisition points 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.

87   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.

88   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 actually making them, click Dry Run instead of Apply.

89   A confirmation message is displayed. If it was not possible to make all the requested changes, the message is different. See below for examples.

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NHS Supply Chain

Requirement global edit

✔ **Successfully changed 3 of 3 requirements**   ⊗

Global update results: updating requirement for products AAR033 (Stock) to PRODUCT789 (Local)

Reqpoint	Result	Message
100001 - CASTLE WARD [52] (GLN: 6785643256765)	OK	
100098 - SNOWFLAKE RESPITE CARE UNIT (GLN: 8392918273488)	OK	
103025 - PRIORY WARD [34] (GLN: 4839203053928)	OK	

Requirement global edit

⚠ **Successfully changed 1 of 2 requirements, 1 failed.**   ⊗

Global update results: updating requirement for products AAR033 (Stock) to PRODUCT789 (Local)

Reqpoint	Result	Message
100002 - ABBEY WARD [41] (GLN: 4873829382710)	OK	
100007 - PALACE WARD [45] (GLN: 9483728394926)	Failed	Destination requirement already exists

---

Unit of issue pack size changes are calculated and stock levels are automatically amended when the change is saved. A message similar to this one is displayed in the top right corner of the page.

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

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

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

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

Deleting products across requisition points

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

90 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.

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

Requirement global delete

Source product

Search for a product ◄─────────   All ▾

Product details

The possible matches are those products that are current requirements.

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92 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.

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

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

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

Requirement global delete

Product				
AAR033 - Cold Beverages Carbonated 330ml Can Sprite Zero 330ml can				×	All ▾

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		

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	9.61	0.00	0.00	0.00

Requisition points

```
100001 - CASTLE WARD [52] (GLN: 6785643256765)
100007 - PALACE WARD [45] (GLN: 9483728394926)
```

Cancel   Delete

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

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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:

95   Select Admin and then EDC Imports from the menu.

The Import and Export options available depend on your role.

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

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

97 Click Download req point stock requirements.

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

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

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Making changes to 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 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.
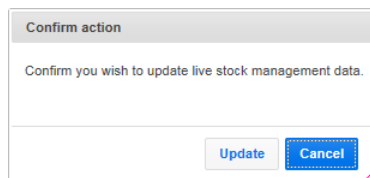
- Delete removes the entry from the requisition point's requirements.

Save the changes made to the spreadsheet.

Importing the changed requirements

To import the changes:

9 Select Admin and then EDC Imports from the menu.

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

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

12 Click Import Data.

13 Confirm that you want to import the information in the spreadsheet.

If the spreadsheet contains invalid rows, those rows are not imported.

A message indicates how many rows were imported, how many failed and how many blank rows were in the spreadsheet. The example message below contains a line for imported requirements. Imported stock definitions (eDC Gold only) and barcodes are shown in the same way.

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

The downloaded errors spreadsheet only contains rows where errors were identified. Details of the error are shown in a column on the far right.

Correct the errors and re-import the spreadsheet.

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Managing stock (G)

> You need to have the *EDC Stock Management* role if you want to use eDC Gold to manage your stock. You can only have this role if you are using eDC Gold.

Use eDC Gold to manage your stock, monitoring stock levels and tracking 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)

Manage hierarchy is the top option on the Stock menu – this is where places (and people) who have 'stock' are defined.
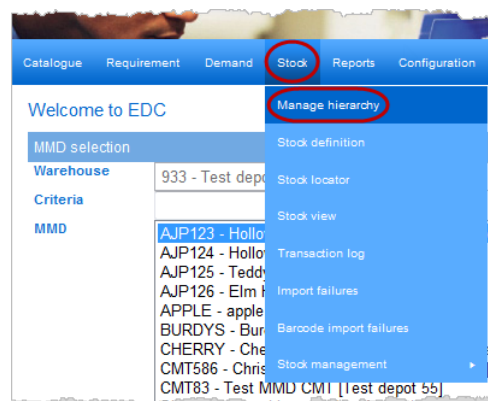
Existing locations for an MMD are shown on the left of the page. There is a key to the various icons on the right, and a list of options that you can use to make changes.

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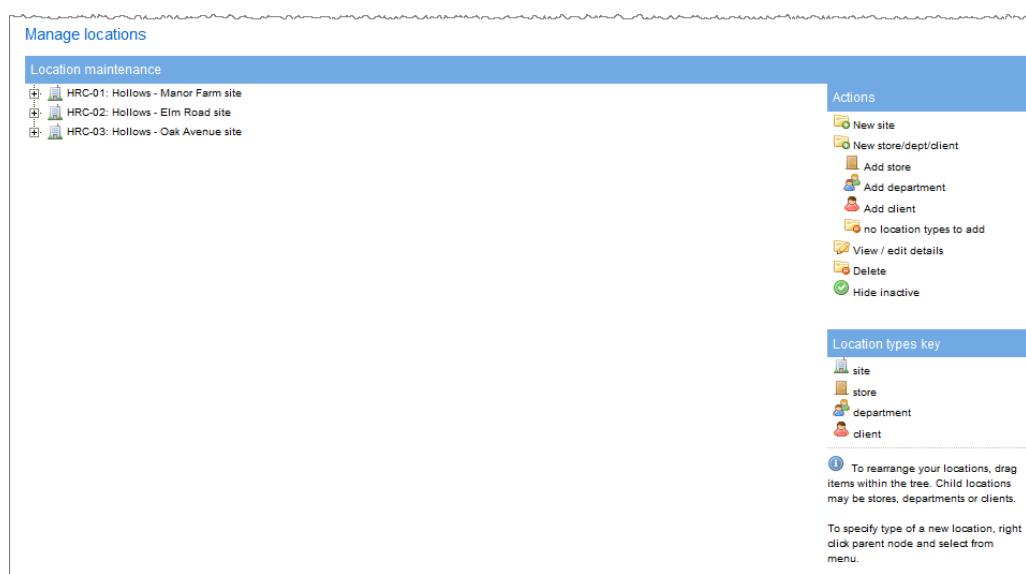
If no sites or stores are associated with your current MMD, the left side of the page is blank.

Creating a new site (G)

You must create at least one site if you want to use eDC Gold to manage stock.
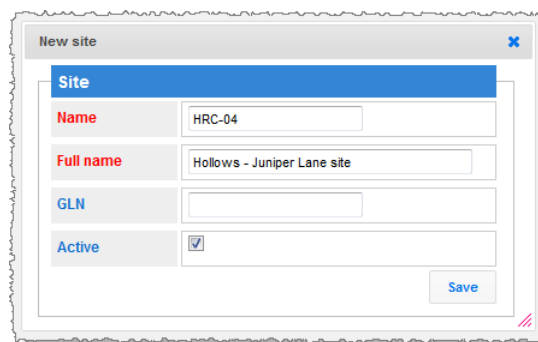
A site is either a physical location or a 'virtual' building used to group related stores. It may be a hospital, a campus or a storage facility. A site is a subdivision of an MMD and you must be logged in to an MMD to create a site.

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:

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

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

New site	
Site	
Name	HRC-04
Full 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 PDA, 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 – you may be given details of this by your organisation's administration. 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.

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

Creating a store (G)

A store is a requisition point that is using 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 if you want to use eDC Gold.
- Each site must contain at least one store, or you will not be able to transfer stock to it.

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

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

To create a store:

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

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

104 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 PDA.

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

105 Bin mask is not currently used.

106 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 there are fewer than 30 days remaining.
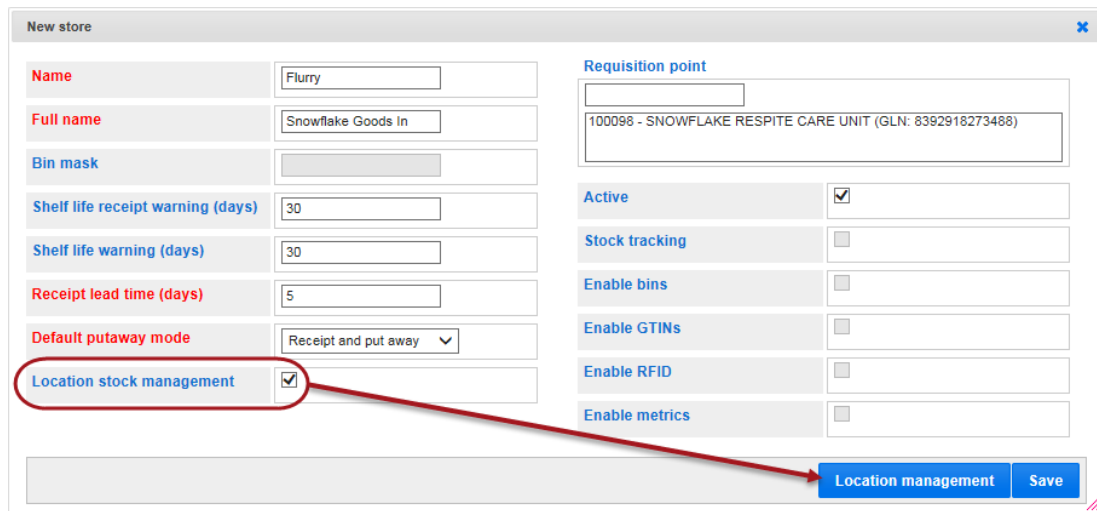
- Shelf life warning (days) is the equivalent to the previous entry but for stock you intend to issue. A warning is generated if a product you are issuing does not have at least this amount of shelf-life left.

- 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 period 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 20 days.

- Default put away mode is how you want to treat goods as they are 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 15323 for more information.
  › Select Receipt and put away to add the products to the stock held in this store straightaway.

107 If you want to be able to record the actual locations of stock – for example, there may be a main operating theatres 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.

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

109 Active is selected by default – this site will be available for use as soon as it has been saved.

110 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.

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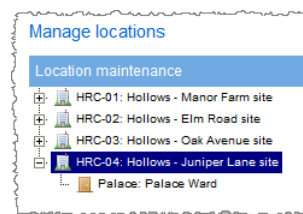
You cannot create any other elements within a store.

Managing locations for a store (G)

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 particular product.

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

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

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

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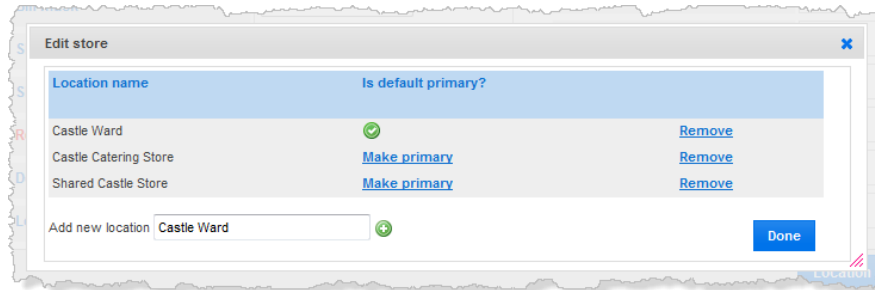
- To set a location as the default primary location (the default on the stock definitions page), click Make primary.

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

- To remove a location, click Remove. You can only remove locations that:

  - Are not specified as the primary location for a store (make another location primary).

  - Are not currently used on any stock definition.

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

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

Creating a department (G)

Sometimes stock is managed by a department rather than a ward or other unit. For example, some therapists may manage their stock at department level.
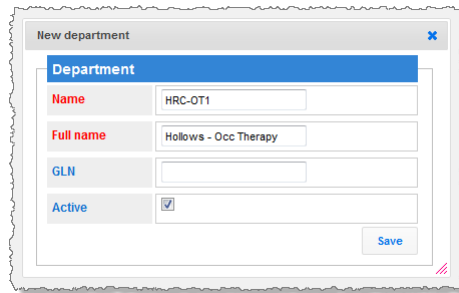
You do not need to create a department to use eDC Gold. Stock can be issued to departments from stores within the same site.

Departments are created within sites.

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

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

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- The Name of the department should be short so it fits on reports and the PDA display.

- The Full name of the department should clearly identify what it is.

- The GLN is a unique number that identifies your department location – you may be given details of this by your organisation's administration. 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.

114 Save the definition. The display now shows the new department within the appropriate site.
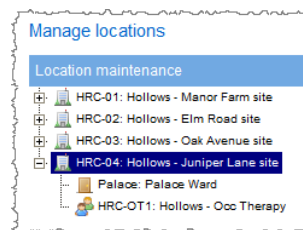
Creating a client (G)

If you want to manage at the level of individual, you need to create clients. These clients may be a particular health care professional (a Nurse Consultant, for example) or an individual patient who has particular and extensive needs.
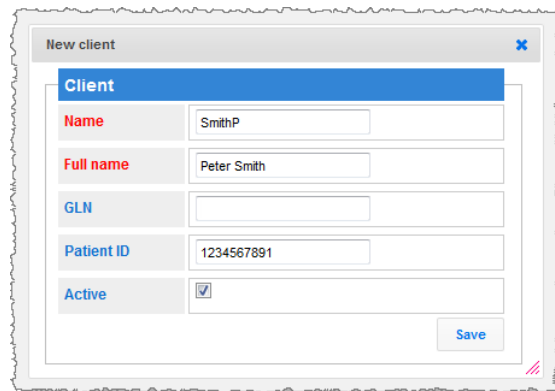
You do not need to create a client to use eDC Gold. Stock is issued to clients (of whatever type) from a store within the same site.

Clients can be created within departments or within sites.

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

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

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117 Complete appropriate details. If the client is a patient, you can optionally record a patient ID.

There is no indication that someone is a patient when issuing stock – you may want to consider indicating this as part of the name.

118 Click Save.
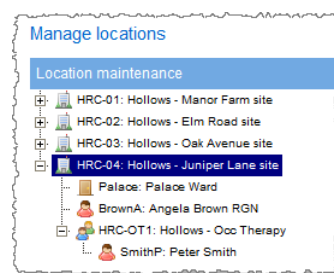
The example above shows two 'client' entries: a nurse consultant at the Juniper Lane site and a patient in the Occupational Therapy department.

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 synchronise the PDA after making any changes.

Stock definitions (G)

Stock is defined for each individual 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 name of the MMD below your name in the right side of the blue menu bar.

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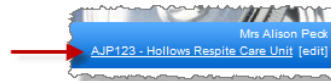
Select a Site and then a Store from the lower part of the page. The sites and stores available depend on the MMD you have already selected, and only sites with stores are listed.
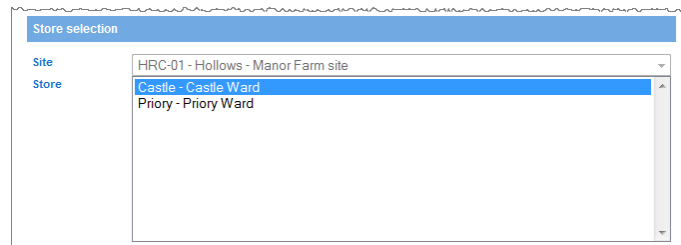
Your current selection (MMD and store, if already selected) are shown in the blue bar towards the top of every page in eDC.

Creating a stock definition (G)

119 Select Stock and then Stock definition from the menu.

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

120 Click Add stock definition.
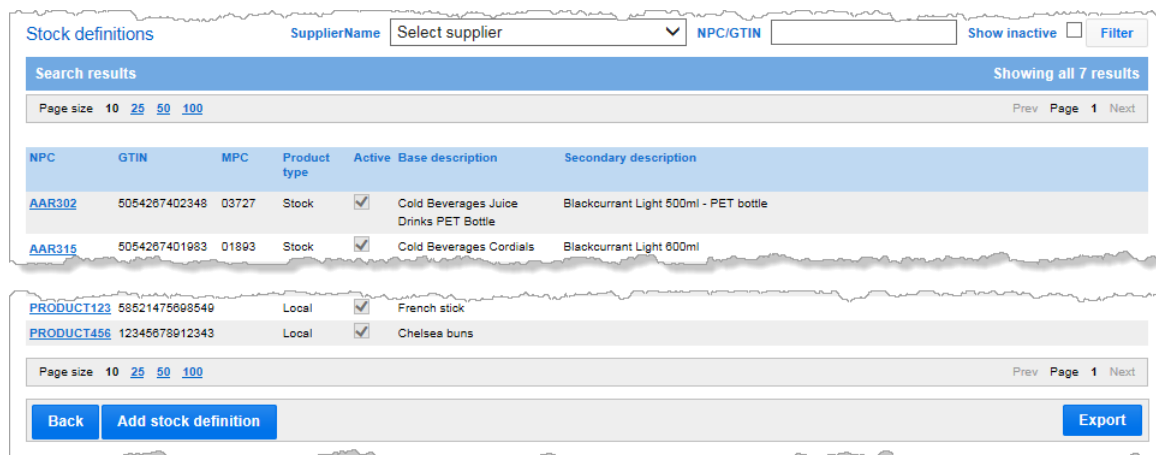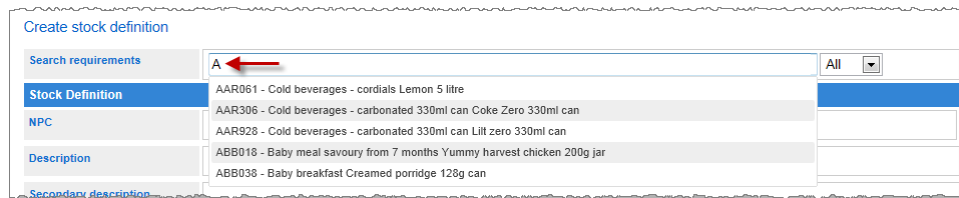
The Create stock definition page opens.

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

121 Start typing in the Search requirements box. Matching requirements for the requisition point associated with your current selected store (see bottom of previous page) are shown if a stock definition does not already exist for them.

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122 Select the requirement from the list.
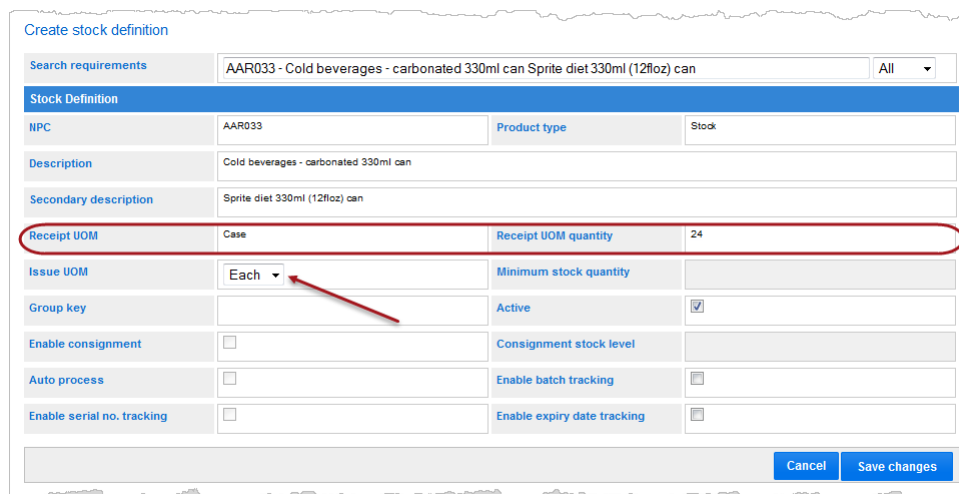
Basic information about the product is displayed that cannot be changed here. This is all of the information in the top part of the page, down as far as Receipt UOM quantity plus Group Key.

Receipt UOM (unit of measure) and Receipt UOM quantity specify the way in which the stock is received. In the example overleaf, this stock item is received in cases and each case contains 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 Auto process to automatically order replenishment stock when you issued products tracked by serial number, Receipt UOM and Issue UOM must be the same *and* Receipt UOM quantity must be 1.

123 This stock definition is marked as Active automatically, making it available for immediate use. If you want to delay this for some reason, clear the Active box.

124 Enable consignment is only available for Blue Diamond and e-Direct products, and products from the local catalogue. Selecting this option indicates that a stock of the product is held by you 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.

125 If you have selected Enable consignment, you must specify a Consignment stock level greater than 0. If Consignment stock level is blank or 0, you are warned that batch and serial numbers are not transmitted.

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If the quantity of stock in hand is greater than the Consignment stock level you specify, no order is generated as it is assumed the surplus stock is already owned by the trust.

126 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:
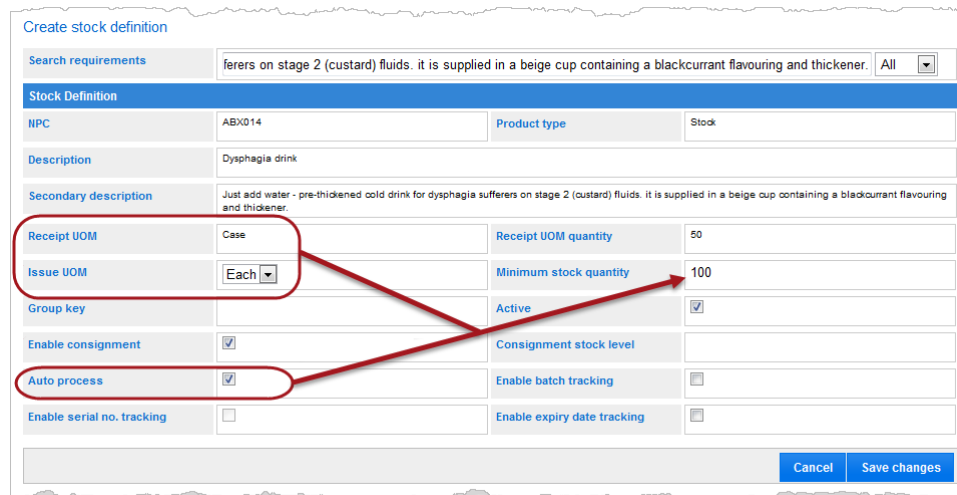
▪ Blue Diamond and e-Direct products

▪ 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 26.

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

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 53) 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, taking your stock level down to 55. An order is generated for a case of 50 taking your *total* stock quantity (actual plus expected) to 105.

   You issue another 30 items, taking your actual stock level (in the store room 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 is ordered.

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Create stock definition

Search requirements	ferers on stage 2 (custard) fluids. it is supplied in a beige cup containing a blackcurrant 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 sufferers on stage 2 (custard) fluids. it is supplied in a beige cup containing a blackcurrant flavouring and thickener.		
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

127 Enable batch tracking, Enable expiry date tracking and Enable serial no. tracking optionally 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.
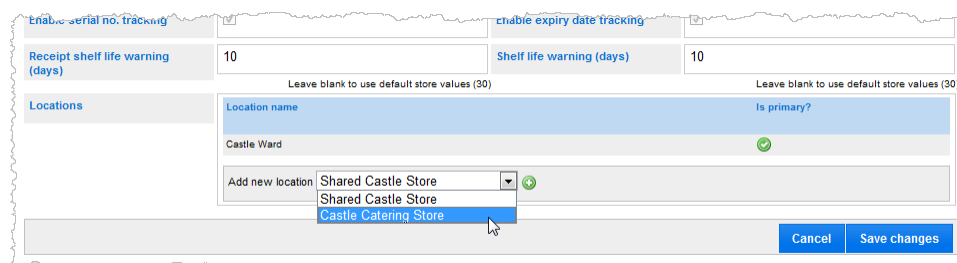
Latest unit cost and Latest VAT rate are shown when you view an existing stock definition. These values are updated from information held by NHS Supply Chain and cannot be changed manually when editing a stock definition.

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

If you have specified stock locations for the current store, the option to select those where this product is stored is given at the bottom of the page.
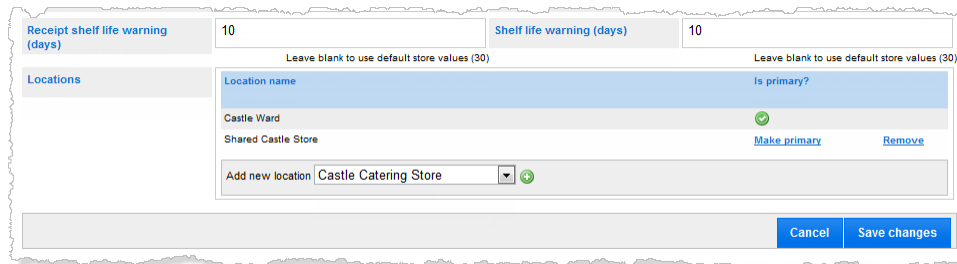
The location specified as the default primary location is already listed. To add other locations (and to change the primary location):

128 Select the location from the list of those available.

Enable serial no. tracking	☑	Enable expiry date tracking	☑
Receipt shelf life warning (days)	10	Shelf life warning (days)	10
	Leave blank to use default store values (30)		Leave blank to use default store values (30)
Locations	Location name		Is primary?
	Castle Ward		✓
	Add new location: Shared Castle Store		
	Shared Castle Store		
	Castle Catering Store		

Cancel   Save changes

129 Click the Add button (⊕) to its right.

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

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

Exporting stock definitions (G)

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

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

Importing and exporting stock definitions (G)

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

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

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

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

132 Select Admin and then EDC Imports from the menu.

The Import and Export options available depend on your role.

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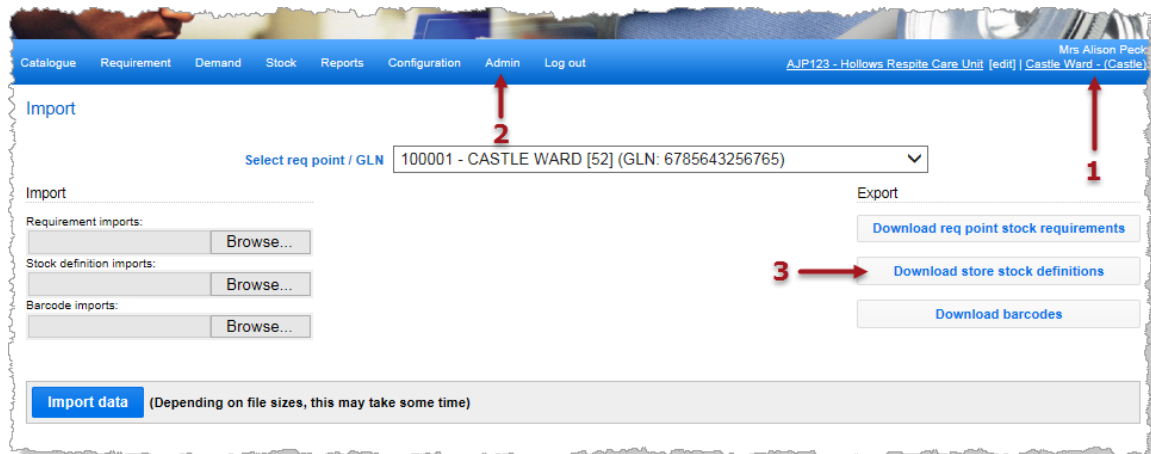
133 Click Download store stock definitions.

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

The stock definitions for the current store are downloaded.

	A	B	C	D	E	F	G	H	I
1	**Stock definitions**								
2									
3									
4									
5									
6						* Auto process can only be set for consignment 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									

Stock definitions 1

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

Stock definitions 1

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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 74 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.

Save the changes made to the spreadsheet.

To import the changes:

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

136 Select Admin and then EDC Imports from the menu.

The Import and Export options available depend on your role.

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

138 Click Import Data.

139 Click Update to confirm that you want to import the information in the spreadsheet.

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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 spreadsheets with errors for details.

OK

140 Click OK to acknowledge the message.

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

Import

Select req point / GLN   100001 - CASTLE WARD [52] (GLN: 6785643256765)

Import

Requirement imports: Browse...

Stock definition imports: Browse...

Barcode imports: Browse...

Export

Download req point stock requirements

Download store stock definitions

Download barcodes

Import data   (Depending on file sizes, this may take some time)

Completed

Stock definition

Complete

Amended:4   Added:0   Deleted:0   Errors: 3   Skipped:0

Download stock definition spreadsheet with errors

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

Only lines with errors are downloaded.

	I	J	K	L	M	N	O	
1					NHS Supply Chain			
2								
3								
4								
5								
6					* Auto process can only be set for consignment stock *			
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	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								

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

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User accounts

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

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

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

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

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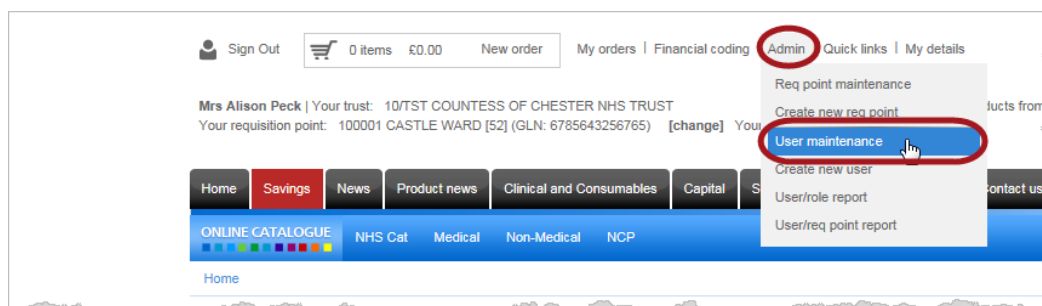
See the *Online Ordering Guidance Notes* for detailed instructions.

Roles

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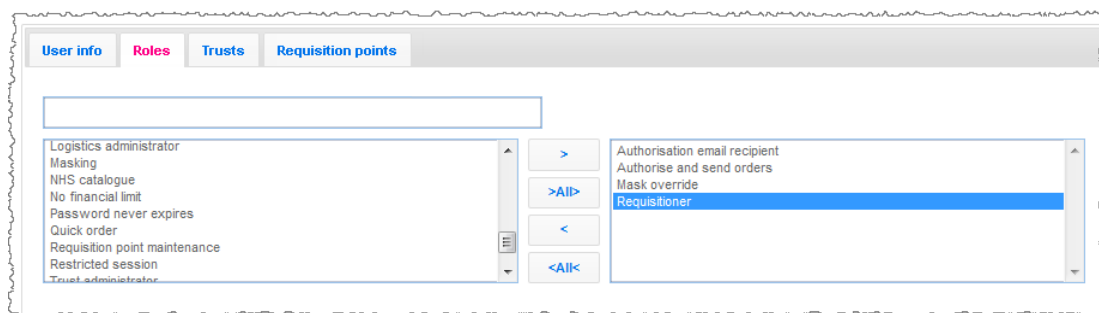
A summary of the eDC roles and what they enable people to do is given in Table 1.

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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 is using eDC Gold, another role is available to you.

Table 2: Additional role 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

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Part 4: Logging on and updating the PDA

You must logon to the PDA before you can use it to capture demand. It is extremely important that you log out again when you have finished.

Updating the PDA

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

Possible changes include:

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

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

The screenshots in this section are taken from the MC 7090.

Where there is a significant difference in a particular area of the application between these screenshots and the display of the MC 55a, this is highlighted in the relevant section.

For general differences between the MC 7090 and the MC 55a, see 'Screen layout differences' on page 15.

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Logging in to a PDA

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

143 Tap the Windows Start menu in the top left corner of the screen.

144 Tap eDC on the menu displayed.

See 'Start menu' on page 16 for an outline of the differences between the MC 7090 (as shown below) and the MC 55a when launching eDC.
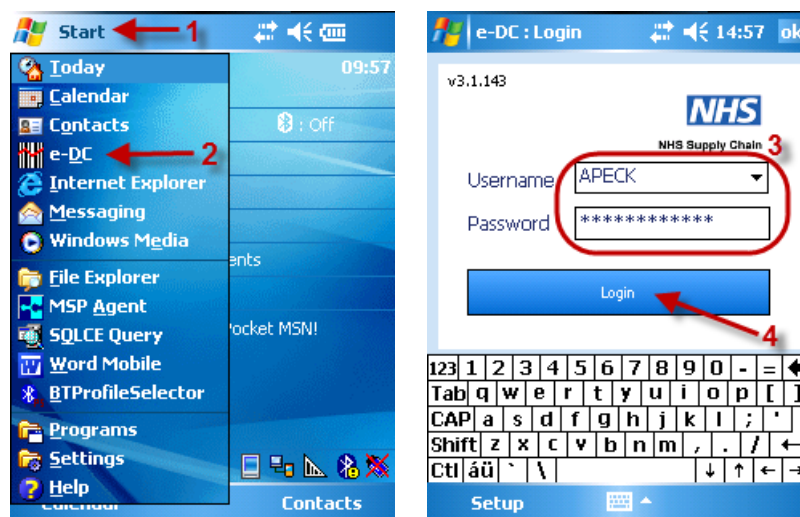
145 Tap the Username box and the small touch keyboard is shown. Type your Username and Password into the boxes

146 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.
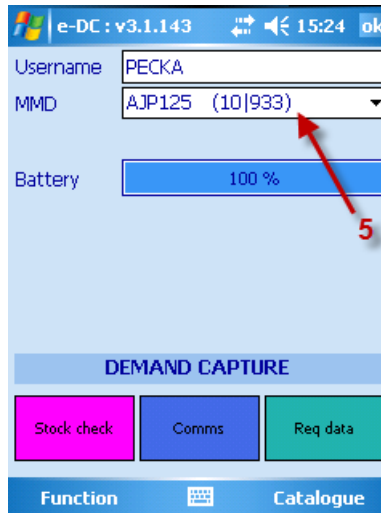
As can be seen from the times to the left of each entry, new information is shown above older information.

147 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 94 and 'Downloading requirements and local catalogue for an MMD' on page 95).

The Store option is only enabled if you are using eDC Gold.

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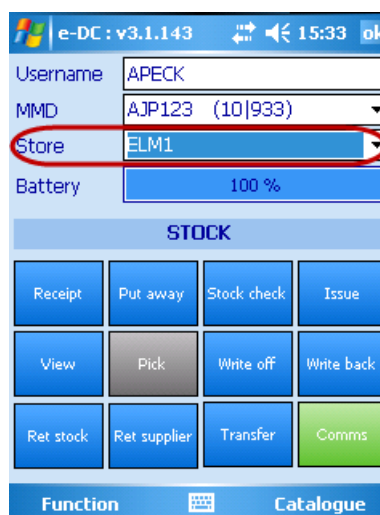
Selecting a store (optional) (G)

If you are using eDC Gold, you have the option to choose a Store – the list of stores associated with an MMD is shown after the MMD has been selected.

You *must* select a Store if you want to track stock levels and locations during this session but should *not* select a Store if you are not intending to do these things.

If you do select a store, you will see the STOCK management options instead of the DEMAND CAPTURE options shown above.

If you have selected the correct MMD but the store you want is not listed, you can download it. See 'Downloading store information (G)' on page 96 for more information.

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Logging out of the PDA

When you have finished using the PDA, you should log out.

148 Tap Function in the bottom left of the PDA screen.

149 Tap Logout in the menu.

150 Confirm that you want to log out when the message is shown.

Alternatively, click OK and then confirm that you want to log out.

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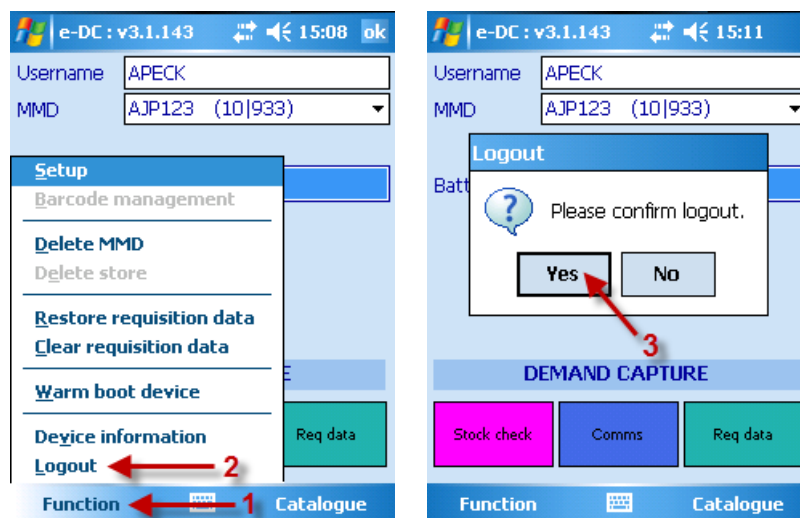
Setting your preferences

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

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

■ Optionally choose to 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 that 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 90.

■ You can view all product details when capturing requirements (Auto Full Screen). See 'Seeing products details when capturing requirements' on page 91.

■ Automatically step through requirements when capturing order or stock quantities. See 'Automatically moving to the next item in requirements view' on page 92.

Specifying which product code to display

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

14 Tap Function at the bottom of the PDA screen.

15 Tap Preferences in the menu displayed.

16 Choose which type of product code to display: NPC, MPC or GTIN.
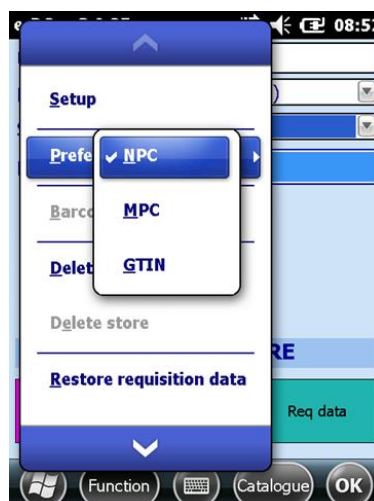
If the stock catalogue is not downloaded, the only option available is NPC (the other options are disabled).

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Scanning barcodes with spaces in the product code

This option enables the PDA to read barcodes that include spaces, and is enabled by default.
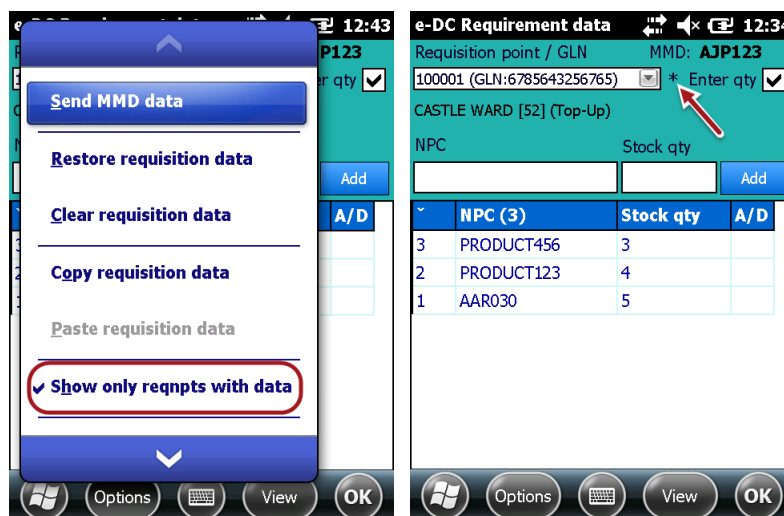
To disable this option:

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.
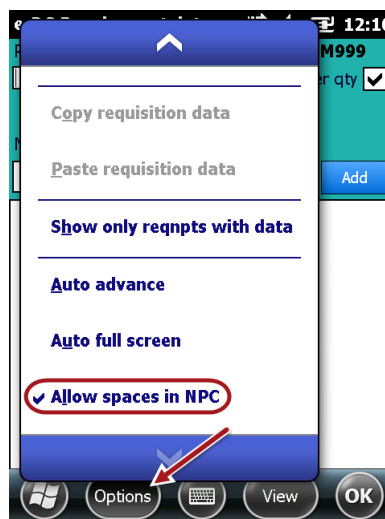
Filtering the list of requisition points to those containing data

You can filter the list of requisition points available for selection in both the requisition and stock taking screens to only show those that contain data.

Tap Options at the bottom left of the screen, select Show only reqnpts with data.

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Now when you select the requisition point drop down list only requisition points with associated data are 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 products details when capturing requirements

If you prefer to view all product detail when capturing requirements in data view, activate Auto Full Screen mode. From the requisition screen, tap Options and select Auto Full Screen.
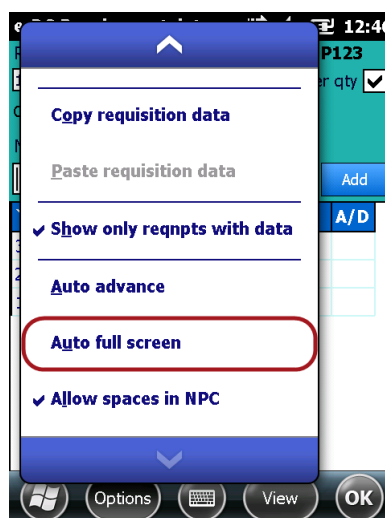
Once activated, the Stock qty field is disabled and product details are displayed after the product code has been entered (whether by scanning or manual entry). Stock qty and Order qty are entered on the detailed product screen, if applicable.

After the order or stock quantity has been entered, the screen reverts back to data view until the next product code is entered.

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

Automatically moving to the next item in requirements view

To automatically select the next item in requirements view, you can enable Auto Advance mode. This is activated from the requirements screen. Tap Options and select Auto Advance.

This option applies to the Requirements view only.
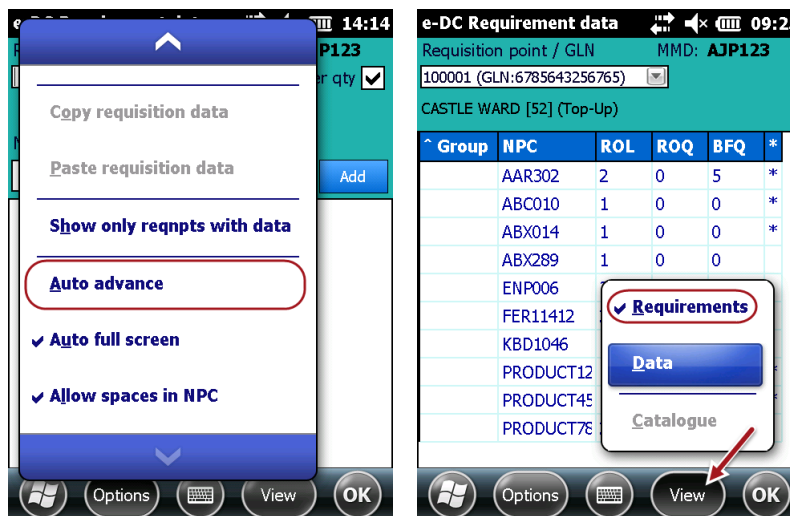
A tick to the left of the option shows that it is activated.

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 you will see if you start from the second option in the list.

To skip to the next item tap Skip.

To revert back to the requirements view tap Cancel.

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

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Updating the PDA

Each time you transfer information between the PDA and the main system, any updates for the eDC program itself are automatically downloaded and applied.

The PDA must be in its cradle to update the information it holds.

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

You should update the PDA 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 have been defined that you want to use. Only those MMDs that you can access are downloaded.

151 Log into the PDA (see 'Logging in to a PDA' on page 85).

152 Tap Comms at the centre bottom of the screen.
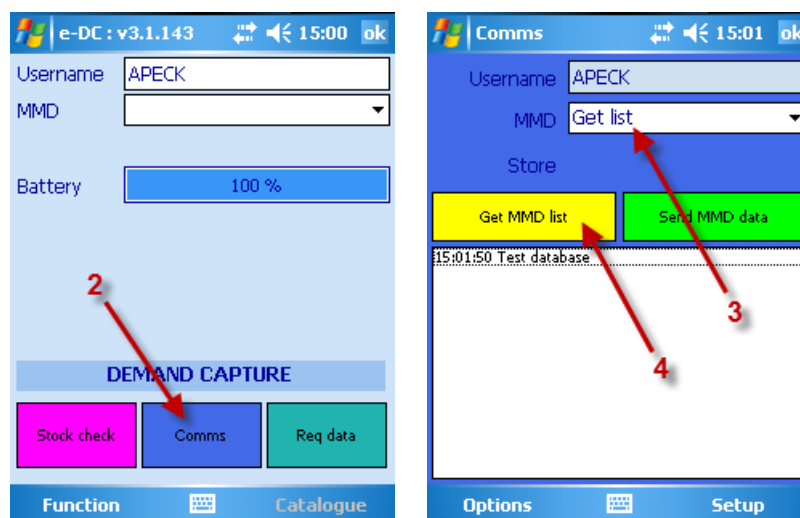
153 In MMD, make sure Get List is displayed.

154 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.

As you can see from the images overleaf, the time stored on the PDA was synchronised with the time on the main system and a check was made for any updates to the eDC application.

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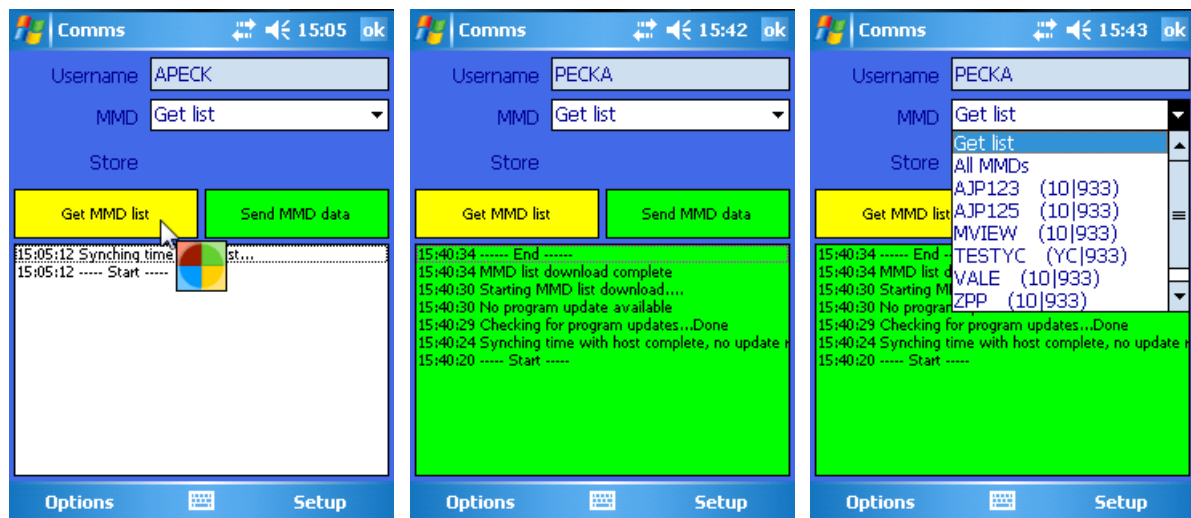
The MMDs listed are not available for use until you have downloaded the requirements associated with them.

Downloading requirements and local catalogue for an MMD

■ You can download requirements for a single MMD or for all MMDs at the same time.

You can also specify that you want to exclude any requisition points that do not have any associated requirement, which speeds up the process.

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

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.

You can only download your local catalogue if your PDA has enough space to hold it.

To download information associated with an MMD:

**155** Select the appropriate MMD from the drop down list.

156 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.

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

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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 PDA.
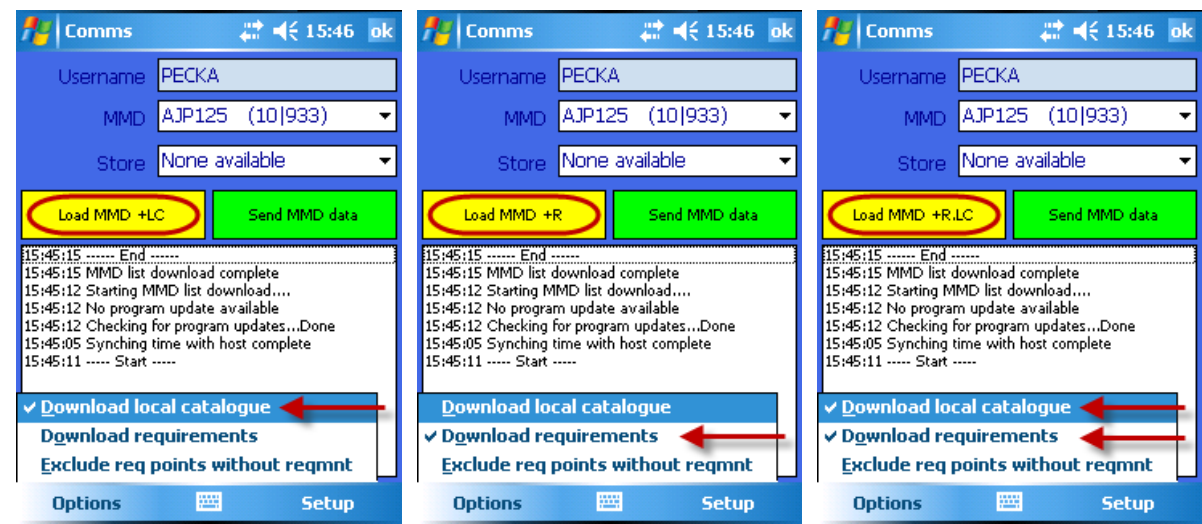
Downloading store information (G)

You can only download and use information about stores if you are 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 PDA.

MMDs and stores are downloaded separately. If you select a store, you are only downloading details for that store and *not* for the associated MMD.
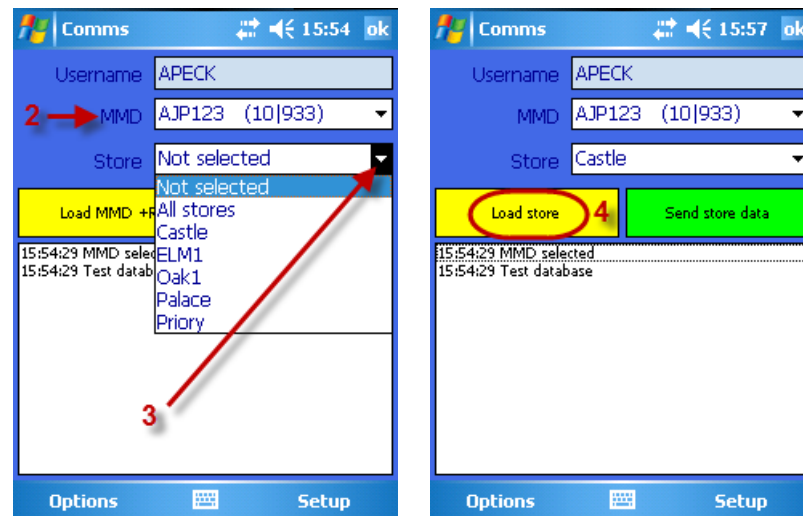
158 Log in and tap COMMS.

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

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

161 Tap Load Store (or Load All Stores).

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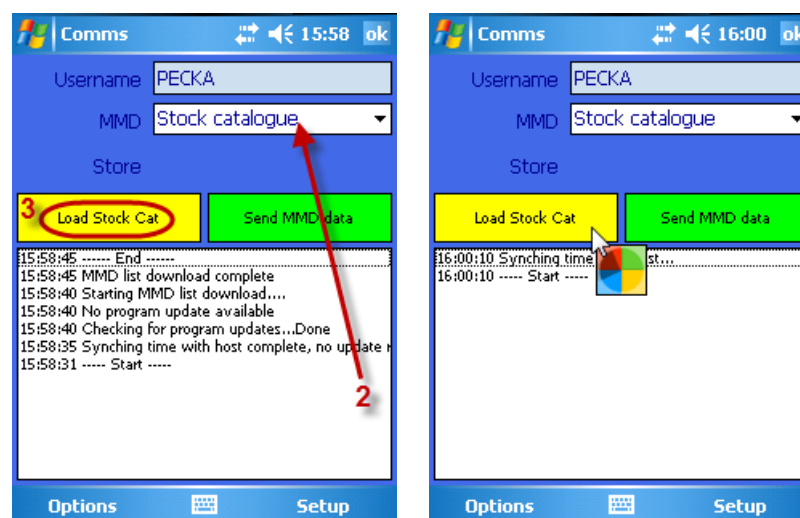
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Downloading the NHS Supply Chain catalogue to the PDA

The stock catalogue will only download if the device contains a storage card with enough capacity to hold it (see 'Managing available memory' on page 100).

162 Follow the instructions in 'Downloading the list of available MMDs' on page 94.

163 Select Stock Catalogue from the bottom of the MMD list.

164 Tap Load Stock Cat to begin. The download may take a long time.

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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 a PDA for managing stock and capturing demand, the relationships between the barcodes and the products they represent have to be known. These relationships can be captured using the PDA and are uploaded to the web application when store details are next uploaded.

You can associate multiple barcodes with a product. As it is possible to receive and issue products in different units of measure, 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:

165 Tap Function.

166 Select Barcode management from the menu.

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

168 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.

169 Specify whether the barcode you have scanned relates to how the product is received (Receivable) or issued (Issuable) when there are different barcodes on individual products and outer packaging (cases or packs).

If the same barcode applies in both cases, select Both.

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The unit of measure for each barcode associated with a product is shown in a column to the right of the barcode details.

The example on the right shows a product that has multiple barcodes associated with it. Some are for packs and others for individual items.

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

Details of failed barcode updates are listed under the Stock menu in the Barcode import failures option.

Removing barcodes from products

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

To remove barcodes from product records:

17 Tap Function.

18 Select Barcode management from the menu.

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

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

21 Tap Delete.

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

170 Tap Yes.

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

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Managing available memory

The amount of storage space available can be found by checking the settings of the PDA – you do not need to be logged in to eDC.

171 Tap the Windows Start button at the top of the screen.

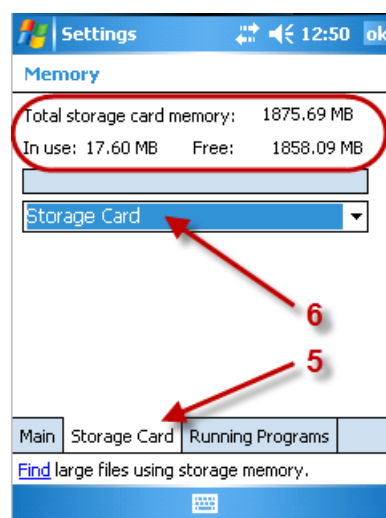**172** Tap Settings towards the bottom of the list of programs and options.

173 Tap the System tab.

174 Tap Memory.

175 The amount of space available on the storage card is shown on the Storage Card page.

176 Select Storage Card from the drop down list.

177 Tap ok in the top right corner of the pop-up window to close it.

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# Removing unwanted MMD – and store (G) – details

Removing unwanted MMD details makes more space available on the device for storing other information.

> 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 PDA. To access the stores – including if you want to delete them – you have to load the MMD again.

Removing MMD details

To delete an MMD:

178 Select the MMD that you want to delete.
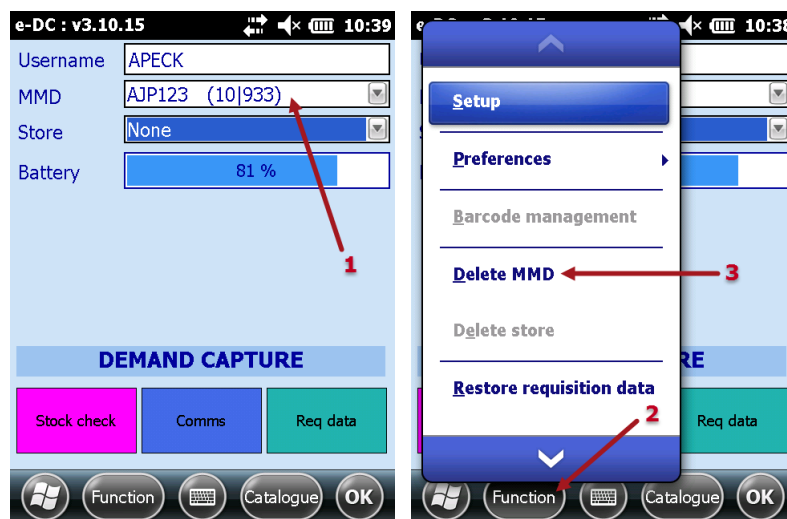
179 Tap Function.

180 Select Delete MMD from the list of options available.

181 You are asked to confirm that you want to remove this information from the PDA.

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 PDA.

To remove a store:

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

23 Tap Function.

24 Select Delete Store from the list of options available.

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

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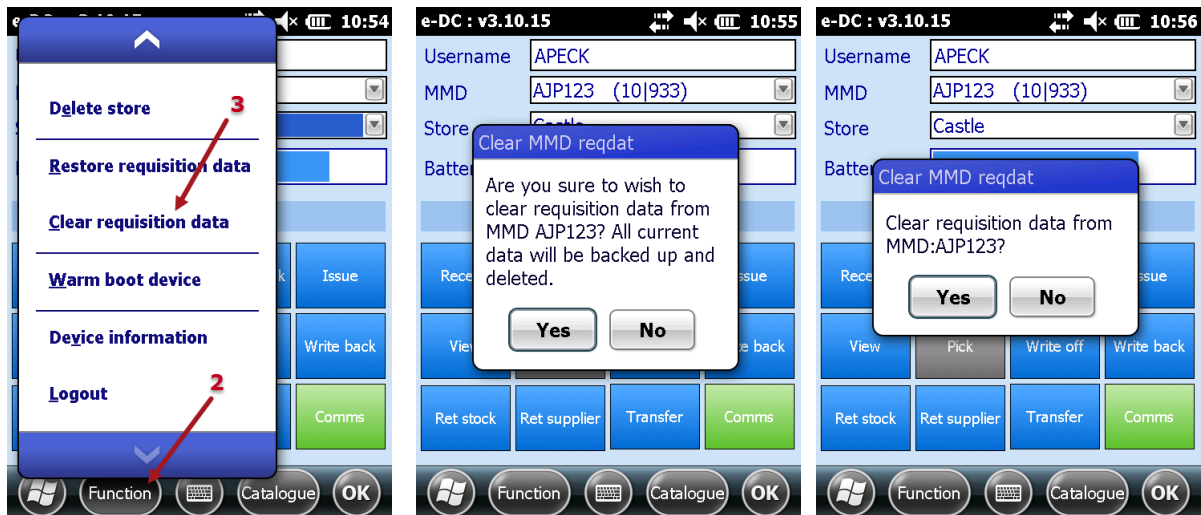
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Clearing and restoring requisition data

■ You can clear requisition data to make some space on your PDA – 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:

182 Log on and select an MMD.

183 Tap Function.

184 Select Clear requisition data from the menu.

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

186 Tap Yes to confirm again that you want to archive the requisition data.

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Once archived, requisition data cannot be viewed until it has been restored.

Restoring requisition data

To restore requisition data:

187 Log on and select an MMD.

188 Tap Function.

189 Select Restore requisition data from the menu.

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

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Part 5: Using the PDA to capture demand and manage stock

The PDA 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 PDA, 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.

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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.
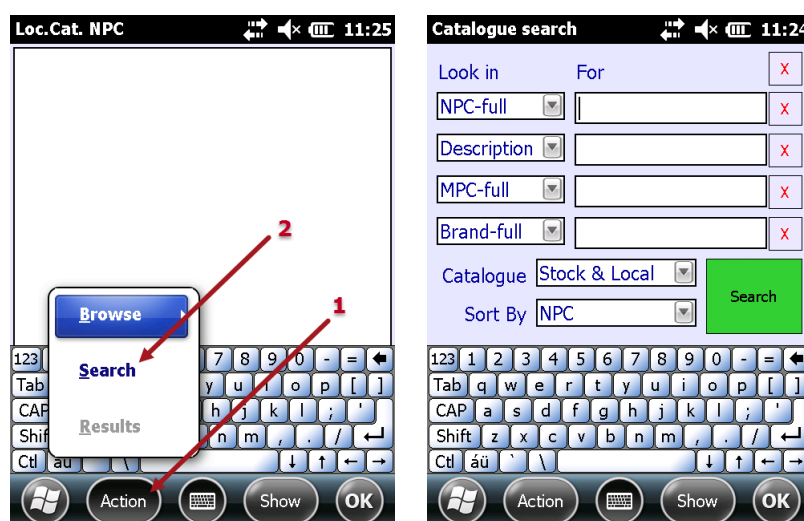
To search or browse the catalogue, tap Catalogue on the lower right of the PDA screen.
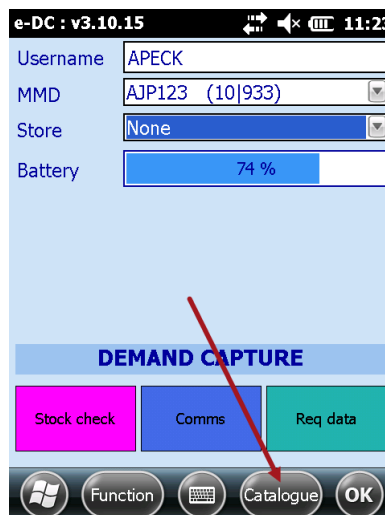
Searching the catalogue

The page used to search the catalogue may be shown automatically when you tap Catalogue. If it is not – perhaps because you have been browsing the catalogue – you can open it.

25 Tap Action in the bottom left of the screen.

26 Tap Search and the Catalogue Search screen opens.

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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

27 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.)

28 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.

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

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

31 Tap Search to begin the search process.

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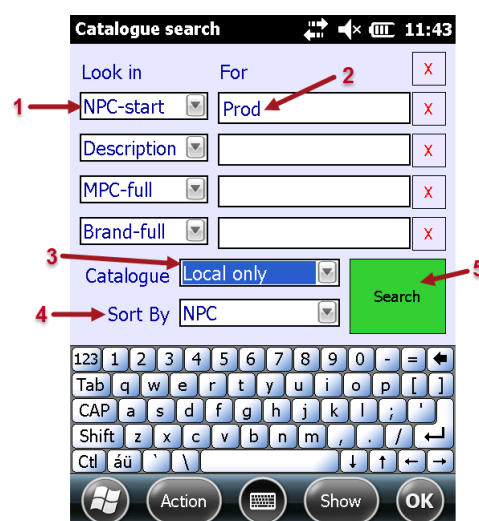
32 A list of possible matches is shown.

- 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.

You may need to scroll to see this as the GTIN is always shown.

33 Tap an entry to show more detail.

Icons are shown to the right of the product description if it is a Blue Diamond or an e-Direct product.

34 Tap OK to go back to the list of products.

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

Technical information (for troubleshooting)

The Show option at the bottom right of the screen enables you to see:

- Technical details of the query that has been submitted (Query)
- The related statistics (Query Stats), which shows how many results there were and how long the query took to run).

You are unlikely to need to use either of these unless there is a problem, when you may be asked for the information by Customer Services.

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.

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To switch to browsing:

35 Tap Action in the bottom left corner of the screen.
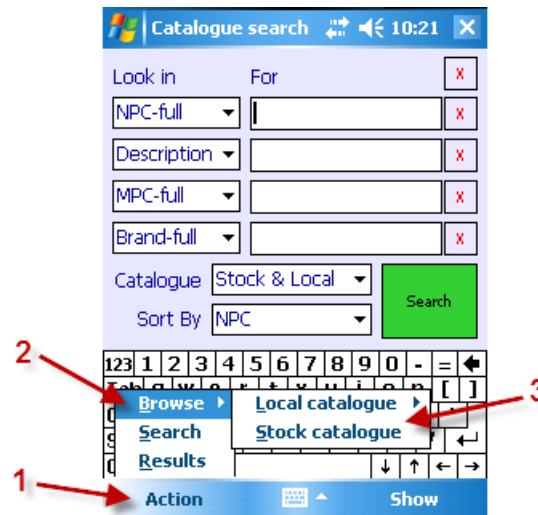
36 Tap Browse at the top of the menu.

37 Tap either Stock Cat to browse the stock catalogue, or Local Cat to see options for browsing the local catalogue.

38 Tap a category, which expands it to show its contents. Continue tapping categories and expanding until you can see details of individual products.
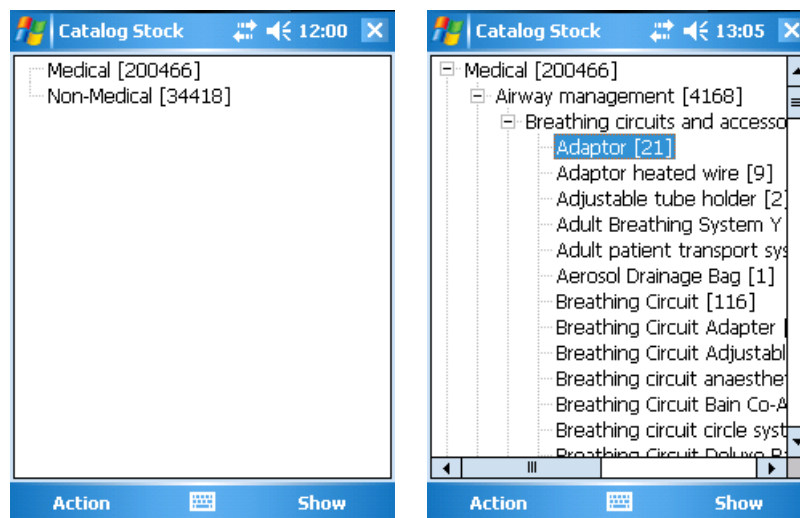
39 Tap an individual product to see details of it as shown on page 107.

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Capturing demand

If you have eDC Gold but want to use the PDA 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 PDA.

To create a requisition from requirements:

40 Tap Req Data.

41 Either scan the Requisition Point's code or select it from the drop down list.
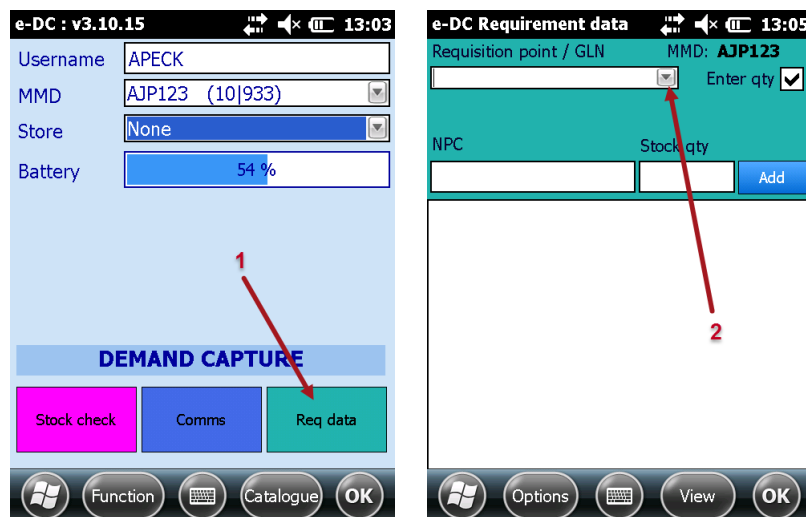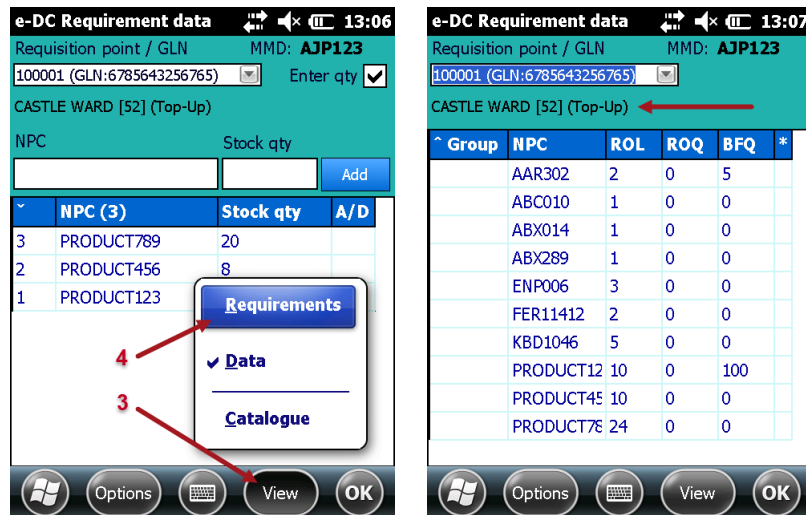
If you are using the top up replenishment method (see 'Replenishment methods' on page 28) but you do not want to enter quantities, tap the Enter Qty box to clear it.

42 Tap View to change the display to show requirements.

43 Tap Requirements on the menu.

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

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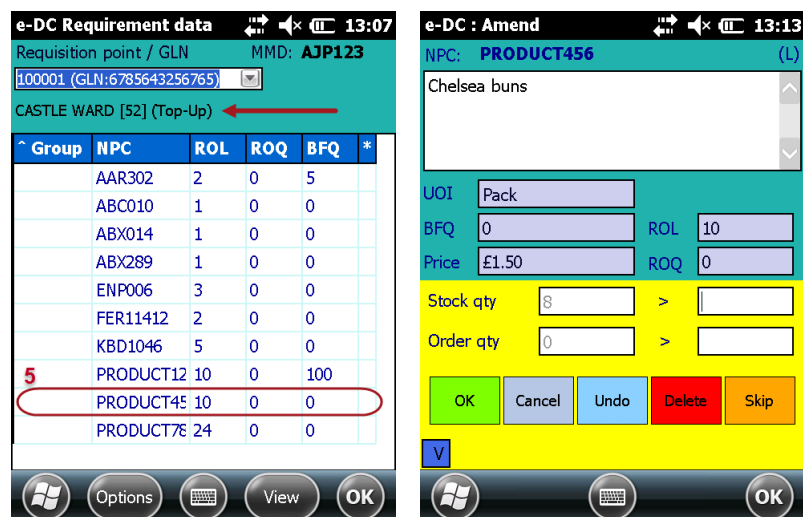
44 Tap a line in the list of requirements.

45 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.

46 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 PDA is uploaded. See 'Deleting a requisition line', below.

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- 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 requirements view' on page 92).

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 28 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 147 for more information.

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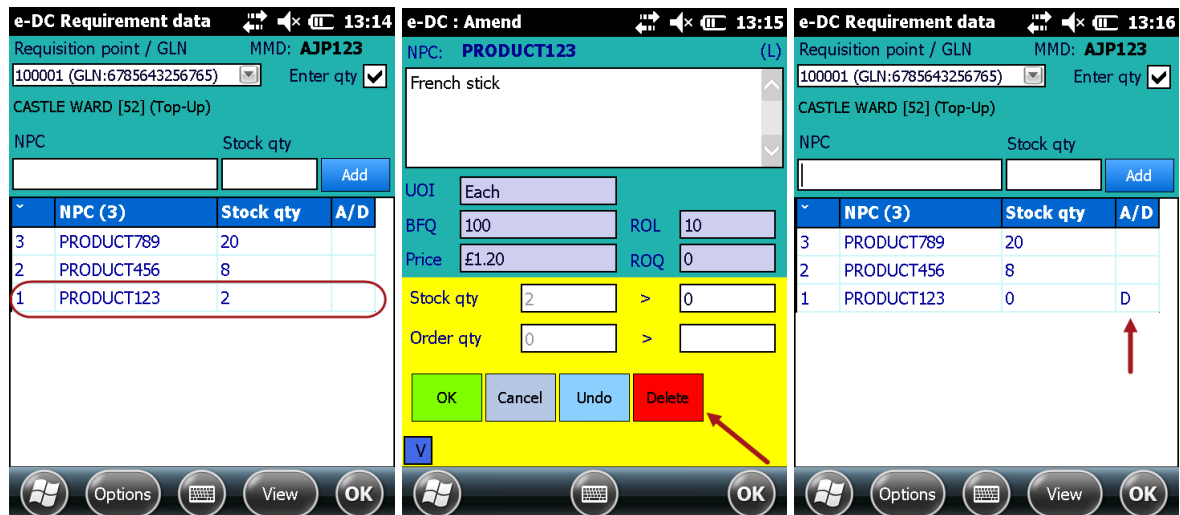
You can mark a requirement for deletion when information on the PDA is next uploaded and processed. Until the demand is processed, it is possible to remove the mark, keeping the requirement.

You can also delete a requisition line from the information to upload – see 'Deleting a requisition line from data for upload' on page 116.

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 D in the final column shows that this product has been flagged for deletion.

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Requisition lines marked for deletion are shown in red in the web application. If you no longer wish to delete a requisition line, you can clear the box to the left of the product code.

Carrying out a stock check

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

191 Log into the PDA as normal.

192 Tap Stock check on the main screen.

193 Select the Requisition point from the drop down list.
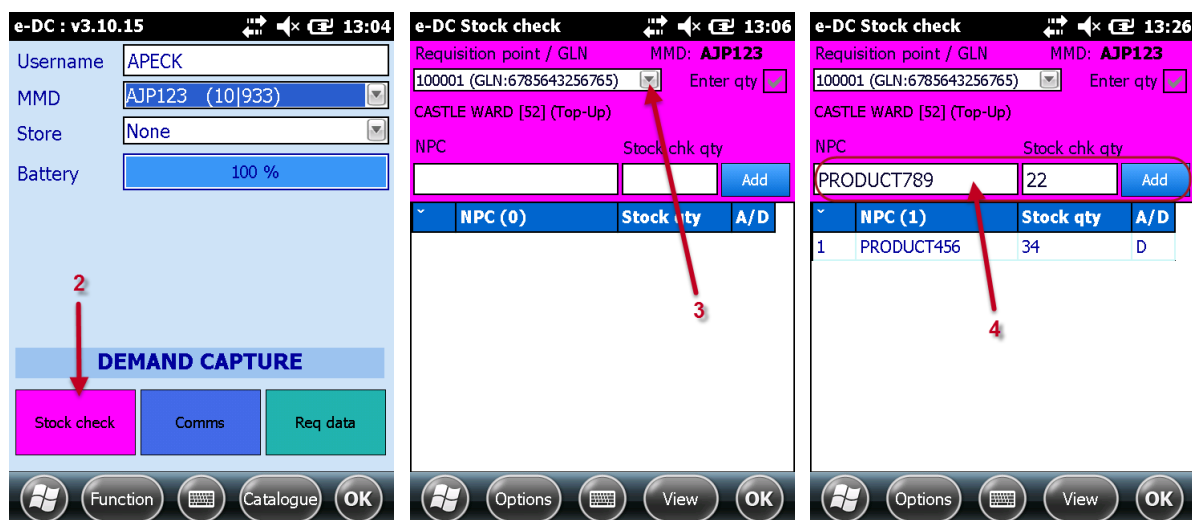
194 You can only record current stock quantities of products:

- 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.

195 Upload results to the web application as described in 'Uploading information to the web application' on page 135.

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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.
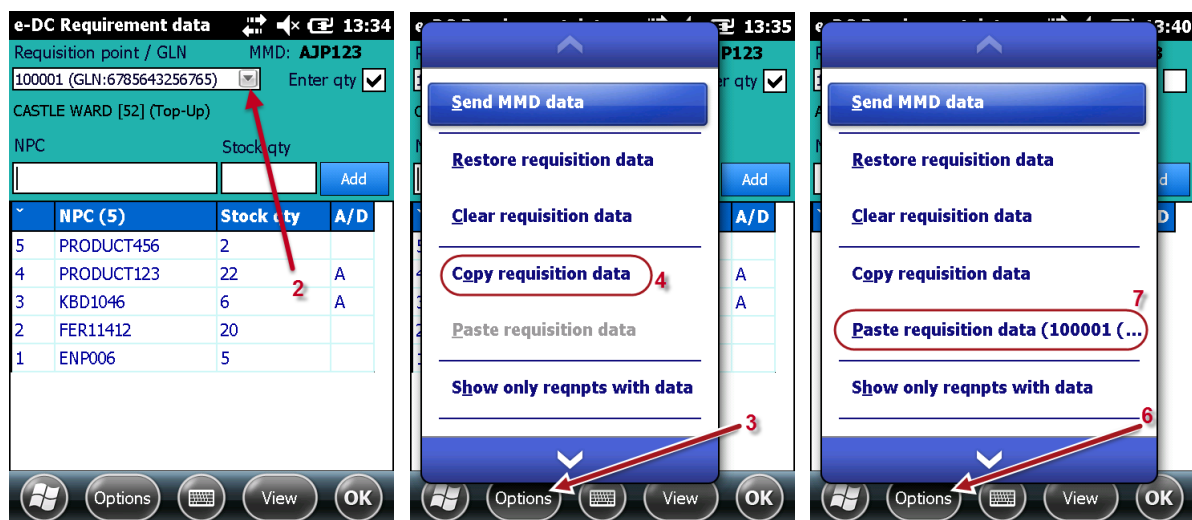
Copying requisition data

Top copy requisition data from one requisition point to another:

196 Tap Req Data.

197 Select the Requisition point that contains the data you want to copy.
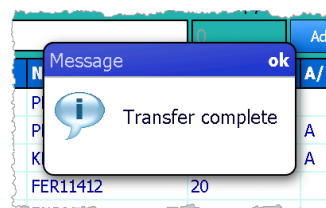
198 Tap Options at the bottom of the screen.

199 Select Copy Requisition Data.

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

201 Tap Options.

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

203 Once the data has been copied, the following message is shown. Tap OK to close it.

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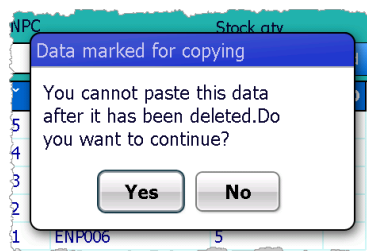
204 Select the Requisition Point on the Requisition Data screen that should *not* have the requisition data.

205 Tap Options.

206 Select Clear Requisition Data.
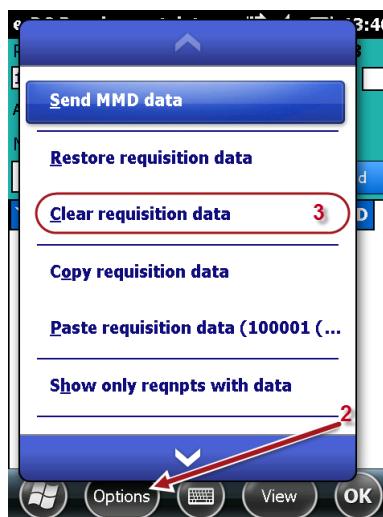
207 If you have chosen to copy data from this requisition point, you are reminded that you cannot paste the data after it has been deleted. Click Yes to continue.

208 Tap Yes in response to the two messages displayed if you are sure you want to delete the data.

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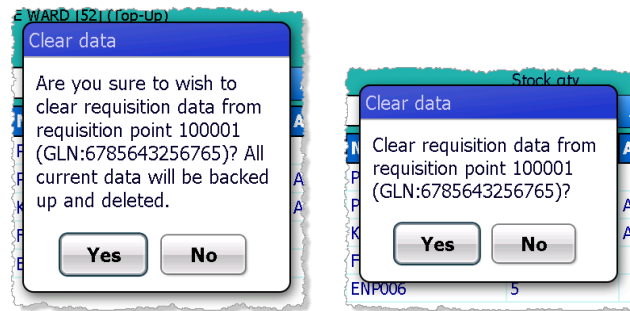
209 A message is shown when the deletion is complete. Tap OK to close it.

## 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.

210 Select the line you wish to delete from the requisition data screen on the PDA.

211 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.
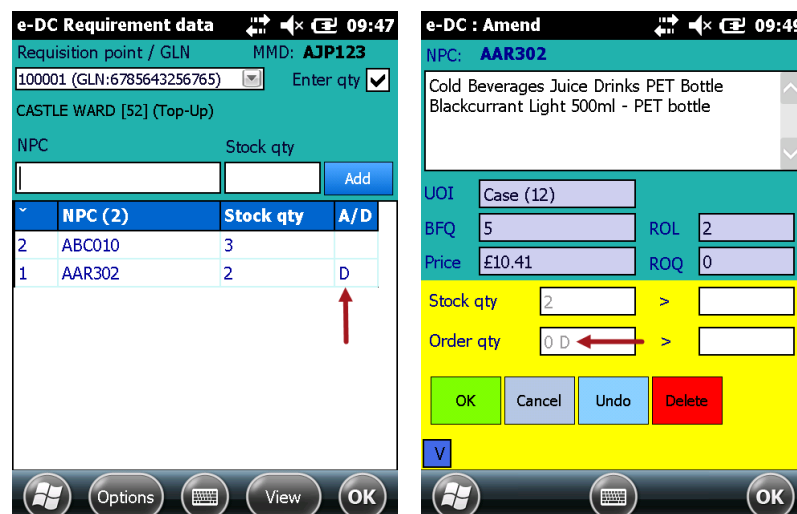
212 Tap the item to view details of it again.

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

213 Tap Delete. You are asked to confirm that you want to permanently remove the item form the list.

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214 Tap Yes.

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

Managing stock levels and movements on the PDA (G)

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

Stock movements explained

A number of options are used when tracking stock levels and movements. You need a clear understanding of what each option does to enable you to keep accurate records.

- **Receipt** – stock is received at your organisation from a supplier. If you do not 'put it away' at the same time, its location is recorded as 'Goods Inward'.

- **Put away** – the stock is put into a store, increasing the stock level at that location.

- **Stock check** – checking that what you have is what is recorded: does not change stock levels.

- **Issue** – take stock from the store and issue it to a department, individual user or patient. Reduces stock level at the store.

- **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 PDA, you must:

47 Log in to the PDA using your username and password.

48 Select the correct MMD from the list.

49 Select the appropriate Store from the list.

50 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.

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Receipting stock using the PDA (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:

51 Tap Receipt in the list of options displayed below the store.

52 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 period, products must be receipted as unplanned receipts. See 'Creating a store (G)' on page 68 for more details.

- Unplanned receipting, 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.
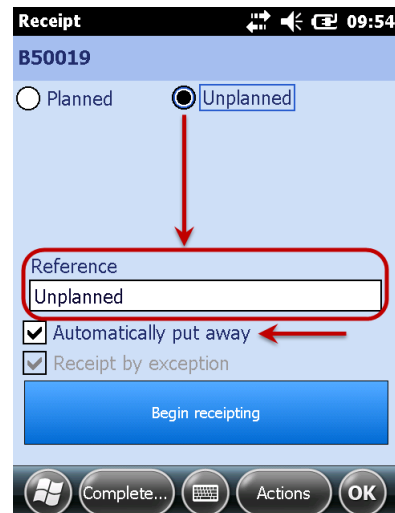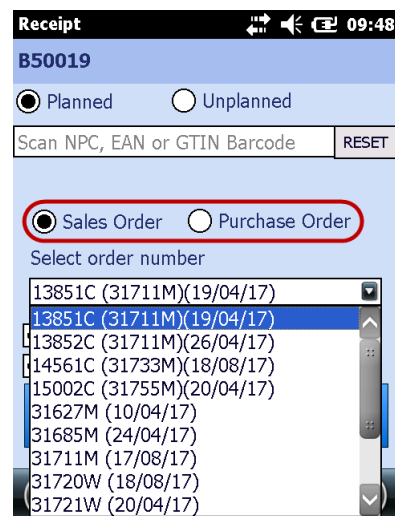
  Receipt by exception is not available for Unplanned receipting.

- Planning receipting, when you are checking goods against an order.

  If you select Planned receipting, 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 – the first 4 orders in the list in the image on the right show the original sales order number for the new computer-generated order (which always has a 'C' suffix). In this example, the original orders had 'M' suffixes.
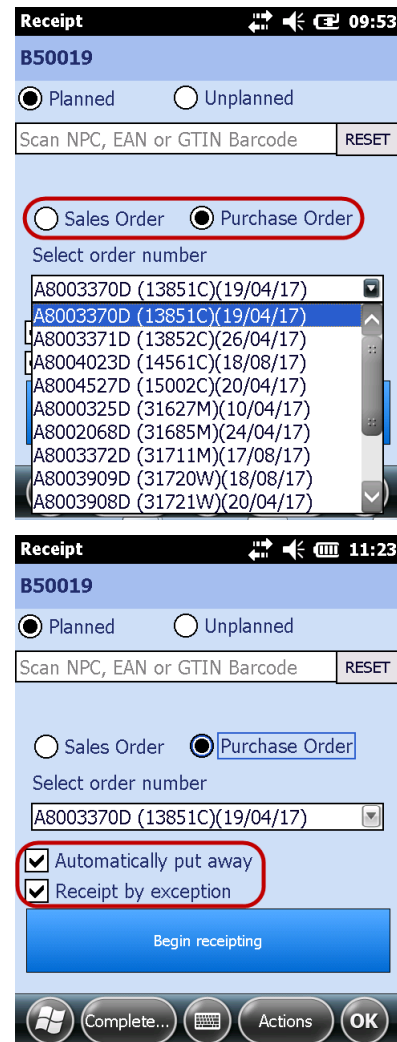
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› Purchase Order numbers – if a purchase order has been raised for Blue Diamond or eDirect orders, you can choose to display it. In the example on the right, the purchase order numbers have a D suffix and the original orders that triggered their creation 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 means you only need to record when the products or quantities received do *not* match the order.

Receipt by exception is not available if a serial number, batch number or expiry date must be associated with the product.

53 When you have made your selection, tap Begin receipting.

54 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.

55 Specify the number you have received in Qty to Rec.

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

If expiry dates, batch numbers or serial numbers are associated with the product, record this information 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.

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

If a batch number, expiry date or a serial number is *required* for the product, the record cannot be saved until this information is provided.
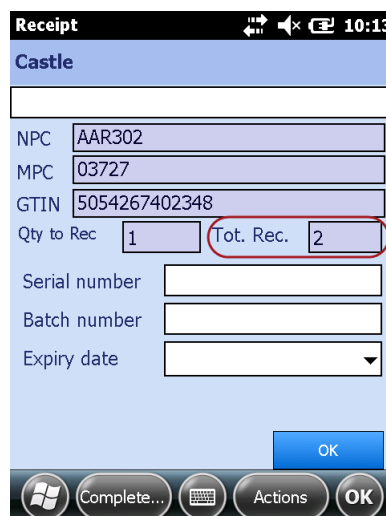
c Clear Mark as complete if you want to record receipt of more of this product (only available for Planned receipts).

d Click OK.

If the expiry date specified is less than the expected shelf life of the product, a warning is shown.
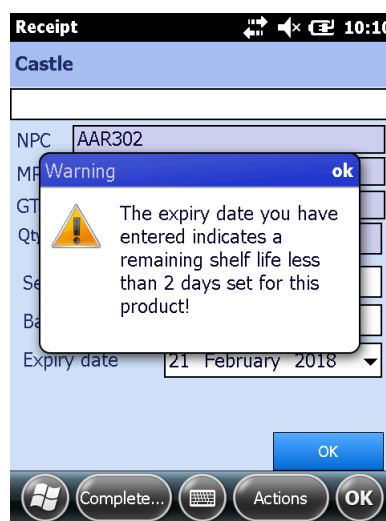
215 Change the date, batch number or serial number and specify a new Qty to Rec with this different information. If the product is associated with a serial number, this is set to 1 and cannot be changed.

The number in Tot. Rec. updates to show the new total.

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216 If appropriate – all receipting for this product is finished – select Mark as complete.

Clear Mark as complete if you want to record receipt of more of this product (only available for Planned receipts).

This is only applicable to Planned receipts, and indicates that even though less than the expected quantity may have been received, no more is expected, removing the item from the list of orders after the data has been uploaded.

217 Tap OK to save the information, and continue to record information for other products received.

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

218 When you have completing receipting products, tap Complete… at the bottom of the screen.

219 You are asked to confirm that you want to complete receipting all the products, which makes the stock available.

You can select Complete… at any time to save the information you have entered so far. This reduces the likelihood of having to discard a lot of work should you be interrupted.

Making changes to the information entered (G)

To make changes to the information entered before confirming receipt:

220 Tap the Actions button and select Edit mode to make changes to any of the information you have entered.

221 Use the options below the displayed date (see above) to step backwards and forwards through the individual records to check the information recorded for each of them.

222 Make any necessary changes.

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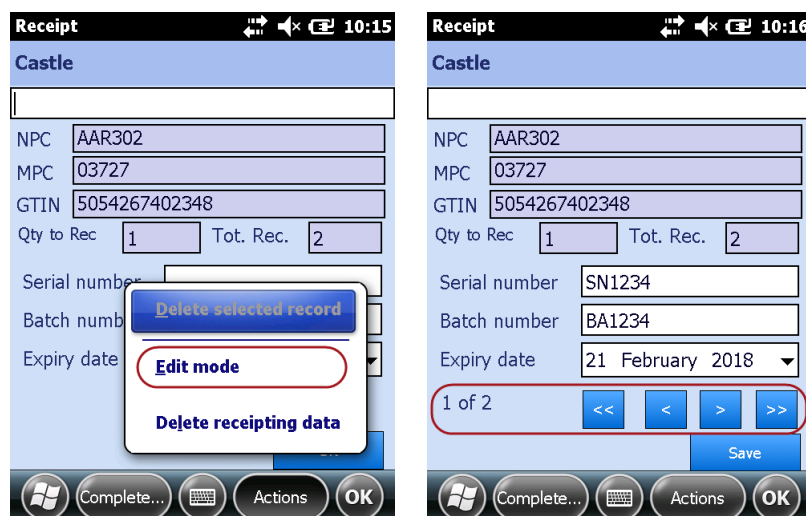
223 To delete an individual record:

    a   Tap the Actions menu again.

    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.

56 Tap Save to save your changes.

57 Select or clear Mark as complete as appropriate.

58 Tap OK to record receipt of this product using the details you have specified.

Associating barcodes with products when recording receipt (G)

You can associate new barcodes with products while recording the receipt of those products.

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 next uploaded. See page 98 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:

59 Tap Actions.

60 Tap Delete receipting data.

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

61 Tap Yes. The information is cleared and you can start again.

Put away stock using the PDA (G)

'Put away' add 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:

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

63 Select the product you want to put away from the list displayed.
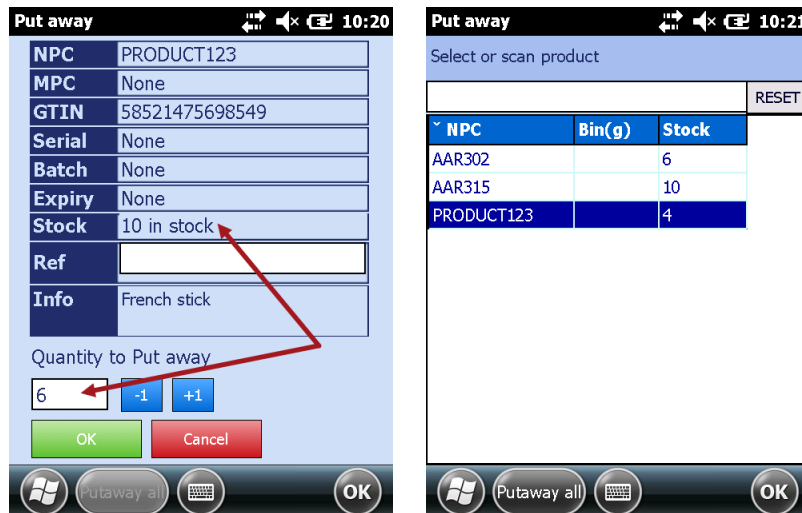
    If your product has many entries (different expiry dates, batch numbers or serial numbers), these are listed. You can choose to Putaway all at this stage without going further or you

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can tap one of the list entries to put away one of the variations (and optionally record a reference).

64 Use the -1 and +1 buttons to change the number being put away – or use the keypad to type the number in the box. Optionally record a reference for this product.

If there is only one of this product, the -1 and +1 buttons do not exist.

65 Tap OK – this returns you to a page showing how many of this product are left to put away. (You can Put away all now if you decide to do so – see image on the right, above.)

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

67 Tap OK again to return to the screen showing the stock management options.

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

A store level stock check enables you to verify that the quantity of stock recorded on the system matches the quantity physically in the store. Stock levels are recorded for each location associated with a store and the total quantity of a product across all locations is calculated and uploaded to eDC.

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 113.

To perform a store level stock check:

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

225 If location management is enabled for the current store (see 'Managing locations for a store (G)' on page 70), select the store from the list shown.

If this store isn't associated with any locations, go straight to selecting a product (step 226).

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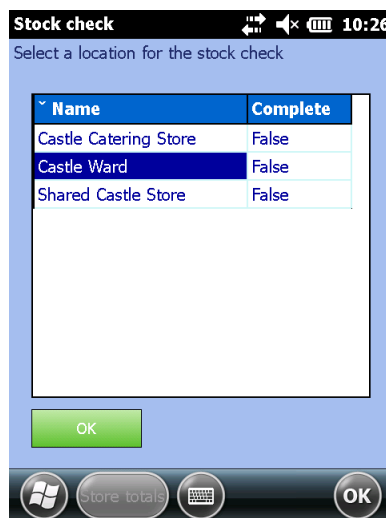
226 Select the product for which you want to check stock levels from the list displayed.

> In the examples below, Castle Ward has been selected as the location – and this shows in the bar at the top of the screen. If Location stock management is not being used, the title is just Stock check.

227 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. This is only applicable if you are using Location stock management (see 'Managing locations for a store (G)' on page 70 and 'Specifying stock locations as part of a stock definition (G)'on page 77).

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

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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 Actions.
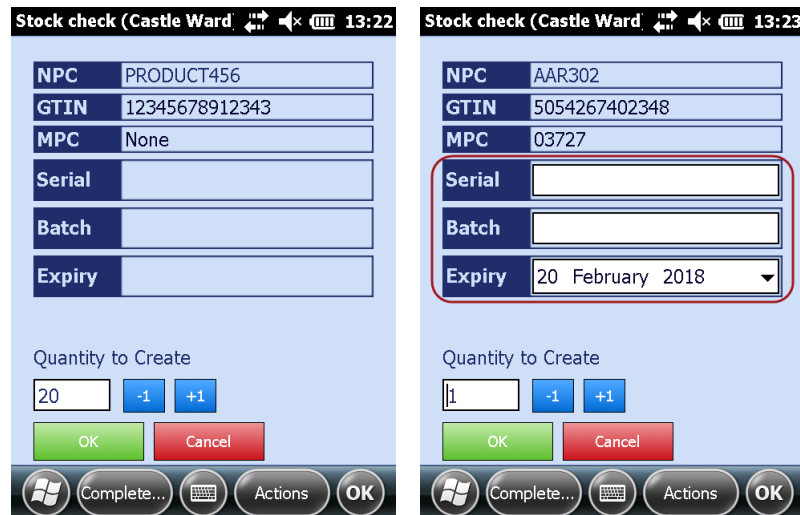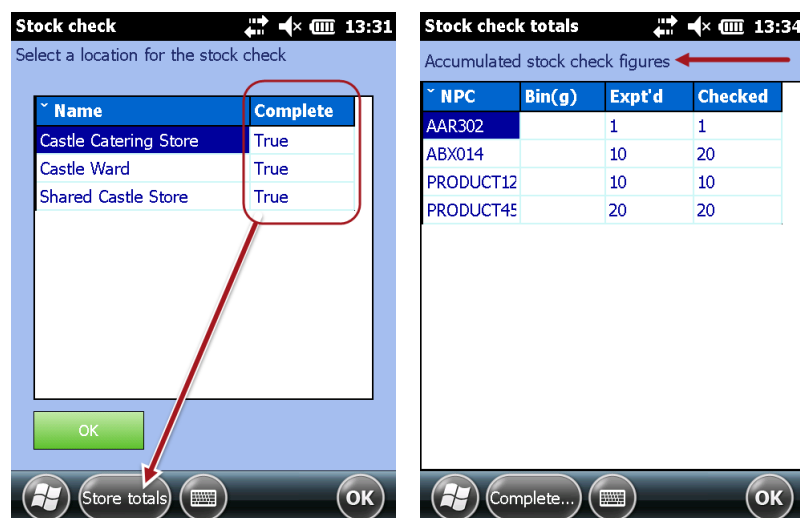
b Tap Add new stock item.

c For stock that has no additional properties, just specify the number in stock.

For stock with additional properties, the appropriate fields are available for completion, for you to record the serial number, batch number and expiry date (if applicable).

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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 of them.

f Tap OK to return to the list of products and repeat from step 226.

229 Tap Complete… when you have finished the stock check for this location (or this store, if locations are not associated with the store).

68 Tap OK to acknowledge the message stating that the stock check is complete.

69 If locations are enabled for this store, you are returned to the list of locations:

a Repeat from step 225 for all other locations associated with this store.

b When a stock check has been completed for all locations associated with this store, click Store totals and accumulated stock check figures are shown.

c Click Complete to mark the stock check as completed.

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Deleting stock check data

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

70 Tap Actions.

71 Tap Delete stock check data.

If location management is enabled, this deletes the data for this location; if location management is not enabled, this deletes data for this store.

If you have added data using the Add stock data option, that data is not deleted. You have to enter the quantity as zero when you redo the stock check.

Uploading stock check information (G)

If you attempt to upload stock check figures without selecting Complete:

■ If location management is not enabled, you can choose to confirm the stock check is complete and process the information at that stage.

■ If location management is enabled, you must return to the stock check screens and mark the stock check as Complete.

Issue stock using the PDA (G)

Issuing stock allocates stock to individual people (members of staff or patients) or to departments. It reduces the quantity of stock held in the store.

To issue stock:

72 Tap Issue in the list of options displayed below the store.

73 Search for the product you want to issue either by scanning its barcode or by typing its code into the search box using the keypad.

74 Tap the product that you want to issue.

As with a stock check, a screen may open with multiple entries for a product if items have different serial numbers, batch numbers of expiry dates. If applicable, select the particular item or group of items you want to issue.

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The Issue screen opens.

The top part of the screen is only for information. The Site is fixed – it is the site containing the store you selected when you logged on to the PDA.

75 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.

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

77 Optionally enter a reference for this stock issue in Ref.

78 Use the -1 and +1 buttons to indicate the Quantity to Issue (or type the quantity into the box).

79 Tap OK to issue the stock.

80 Tap OK to return to the main page. The existing stock level is reduced by the quantity you have issued.

View stock levels using the PDA (G)

You can view your current stock levels of any product. To view stock levels:

81 Tap View in the list of options displayed below the store.

82 Search for the product you want to view either by scanning its barcode or by typing its code into the search box using the keypad.
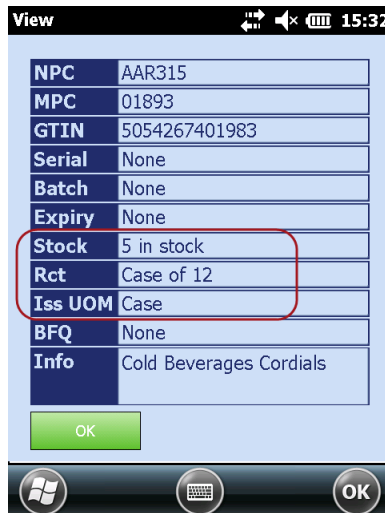
The current stock level and bin details are shown.

83 If you want to confirm that you are viewing the correct product, tap the row to display a screen showing more details.

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In the example below, 5 cases are in Stock. The stock was received (Rct) in cases of 12 items. The product is issued (Iss UOM) in cases.

If this product was received in cases and issued individually, the Stock level would be 60 (5 cases each containing 12 packs) and the Iss UOM would be Each.

84 Tap OK to close the details screen.

85 Tap OK to return to the main page.

Write off stock using the PDA (G)

You should write off stock when you are reducing the quantity you hold but are not issuing it or returning it to the supplier. This may happen, for example, when stock has reached its expiry date.

To write off stock:

86 Tap Write off in the list of options displayed below the store.

87 Search for the product you want to view either by scanning its barcode or by typing its code into the search box using the keypad.

The current stock level and bin details are shown.

88 Tap a row to display a screen showing more details.

89 Optionally enter a reference.

90 Use the -1 and +1 buttons to indicate the Quantity to Write Off (or type the quantity into the box).

91 Tap OK to close the details screen.

92 Tap OK to return to the main page.

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Write back stock using the PDA (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 on stock during a stock check and subsequently found the missing items in a different location.

To write back stock:

93   Tap Write back in the list of options displayed below the store.

94   Search for the product either by scanning its barcode or by typing its code into the search box using the keypad.

95   Optionally record a reference for the transaction.

96   Use the -1 and +1 keys to specify the Quantity to Write Back.

97   Tap OK to confirm the transaction.

98   Tap OK again to return to the main screen.
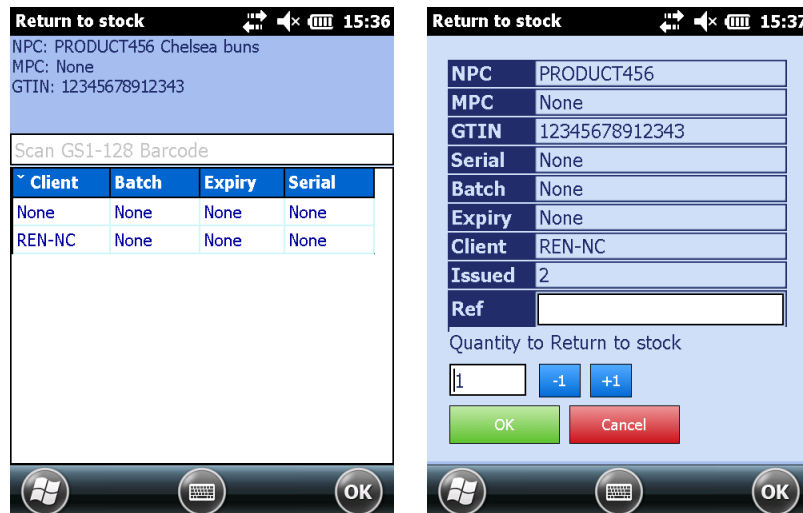
Return goods to stock using the PDA (G)

If you have issued stock that has subsequently been returned to you unused, you can return it to stock.

To return goods to stock:

230   Tap Ret stock in the list of options displayed below the store.

231   Search for the product that has been returned either by scanning its barcode or by typing its code into the search box using the keypad.

232   Tap the product to open a list of the people issued with this product (see image on left, below). All issues to a department are grouped together under Unknown.

233   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.

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234 Optionally enter a reference for this stock return.

235 Use the -1 and +1 buttons to indicate the Quantity to Return To Stock (or type the quantity into the box).

236 Tap OK to issue the stock.

237 Tap OK to return to the main page.

Return goods to the supplier using the PDA (G)

You can return goods to the supplier, decreasing your stock levels. To return goods to the supplier:

238 Tap Ret supplier in the list of options displayed below the store.

239 Search for the product to be returned either by scanning its barcode or by typing its code into the search box using the keypad.

240 Tap the product in the list of products.

The Return to supplier screen opens.

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132
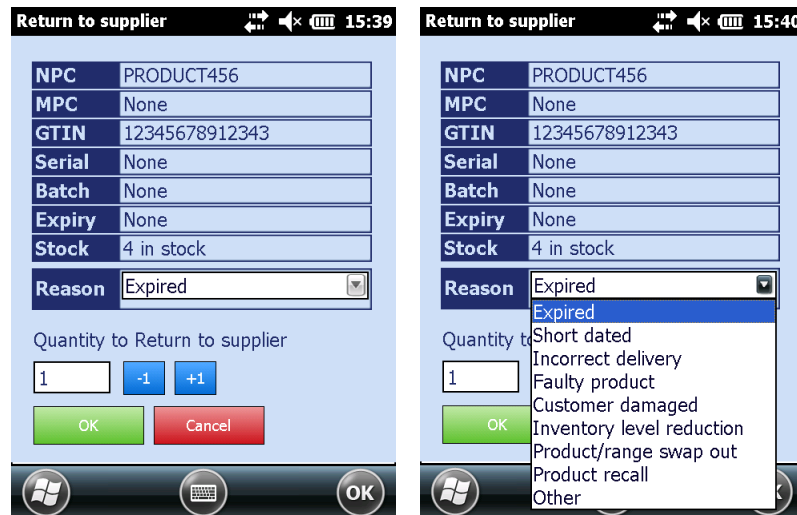
241 Select a Reason for the return from the drop down list. This reason is shown as the Local Reference in the Transaction Log – see 'Monitoring transactions (stock movements) (G)' on page 159).

> The value at the top of the list – Expired – is selected automatically. Change this if it is not the correct reason.

242 Use the -1 and +1 buttons to indicate the Quantity to Return to supplier (or type the quantity into the box).

243 Tap OK. The stock quantity is reduced by the number you returned.

244 Tap OK again to return to the main screen.

Transfer stock using the PDA (G)

You can transfer stock from one store to another, keeping an accurate record of your stock's location.

To transfer stock:

99 Tap Transfer in the list of options displayed below the store.

100 Select the destination site and store from the lists of those available.

101 Tap Begin transfer.

102 Search for the product to be transferred either by scanning its barcode or by typing its code into the search box using the keypad.

103 Tap the product in the list of products.

> The Transfer screen opens. By default, your entire stock of this product is set to transfer.

104 Use the -1 and +1 buttons to indicate the Quantity to Transfer (or type the quantity into the box).

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105 Tap OK. The stock quantity at your store is reduced by the number you transferred and the stock at the destination store is increased.

106 Tap OK again to return to the main screen.

Uploading information to the web application

Once you have captured demand or stock check information, you need to upload it to the web application for it to be processed.

There are two places (on the PDA) 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 PDA using the option on the home page.

To upload the information:

245 Place the PDA in the cradle.

246 Ensure you are logged into the correct MMD on the PDA.

247 On the PDA, tap Comms.
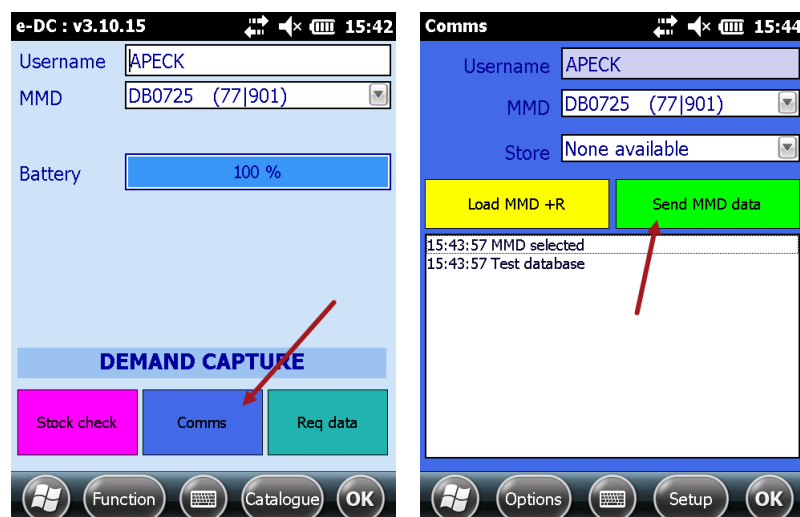
248 Tap Send MMD Data. When complete the background turns green with the 'end' message at the top of the screen.

From the requisition screen

Stock-taking information can only be uploaded from the home screen.

249 Tap Options at the bottom of the screen.

250 Tap Send MMD data.

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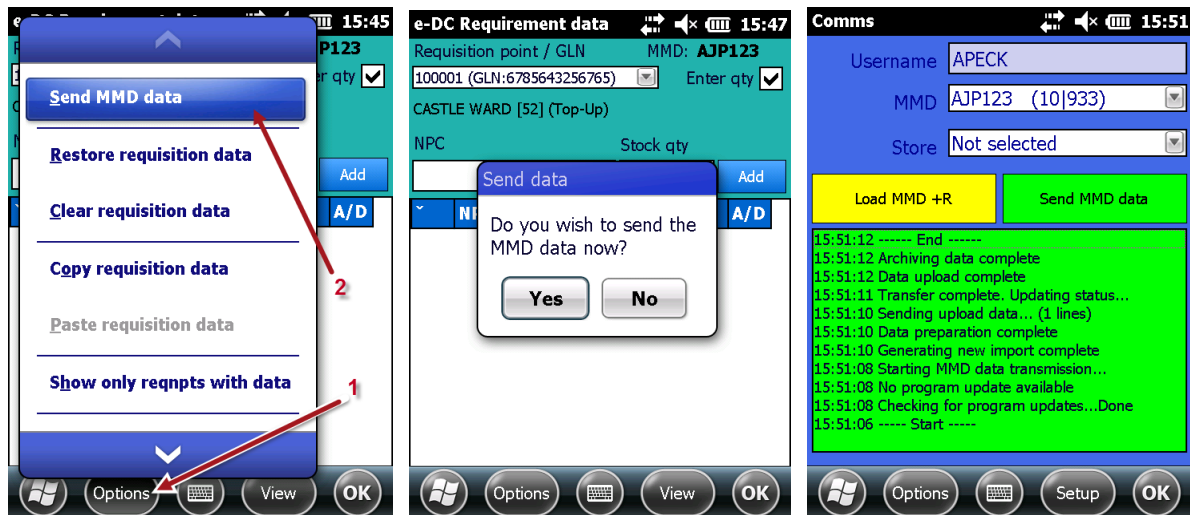
251 Tap Yes to confirm. You are taken to the Comms screen and the data is uploaded.

A backup copy of all collected data is stored on the PDA. If any data loss happens during upload, the collected data can be recovered, and the upload process rerun. See 'Restoring requisition data' on page 103 for instructions.

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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 particular 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 can be captured using the PDA and uploaded.

Demand forms the basis of orders: products are ordered when a demand exists for them. Depending on the way your requisition points have been configured, orders may be created automatically when a demand exists or you may need to manually convert demand to orders.

Demand is managed from the Demand option on the menu when using the web based application.

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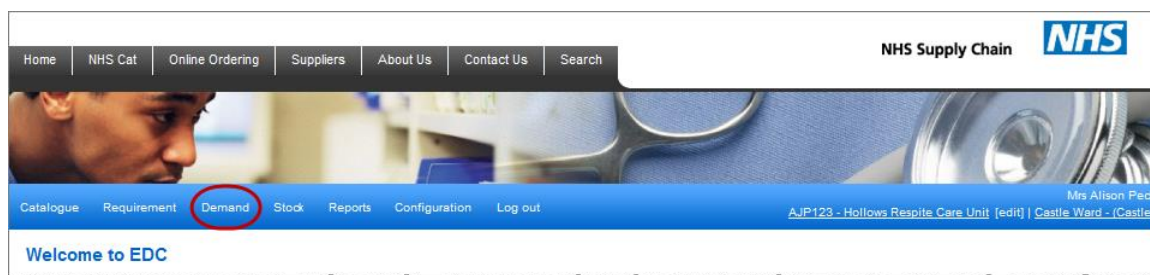
Managing demand
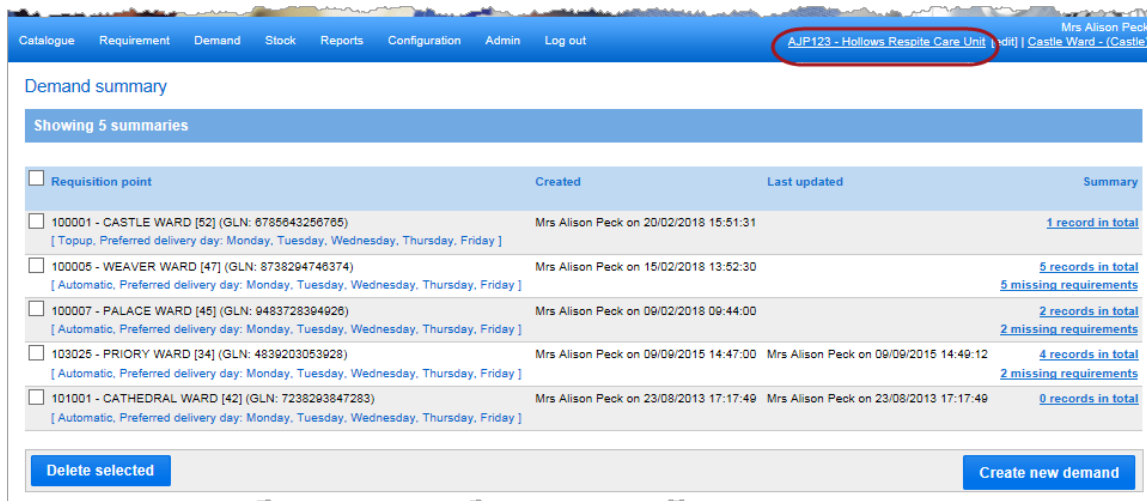
The Demand summary page enables you to verify data uploaded from the PDA and to make changes if required. You can modify the quantities being ordered, create additional demand or delete a demand.

When you have checked the information, you can create an order from the demand to submit to NHS Supply Chain or to 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, shown below.

Demand for all requisition points linked to the MMD you are currently associated with is shown. In the example above, the logged-on user is associated with the Hollows Respite Care Unit, and the two requisition points in that unit that have demand are shown, even though the user is linked to Priory Ward and not Castle Ward.

Below the name of each requisition point in the list is the replenishment method used by that requisition point ('Automatic' for Priory Ward and 'Topup' for Castle Ward) and its preferred delivery days.

Details of when the information was created and last updated are also shown.

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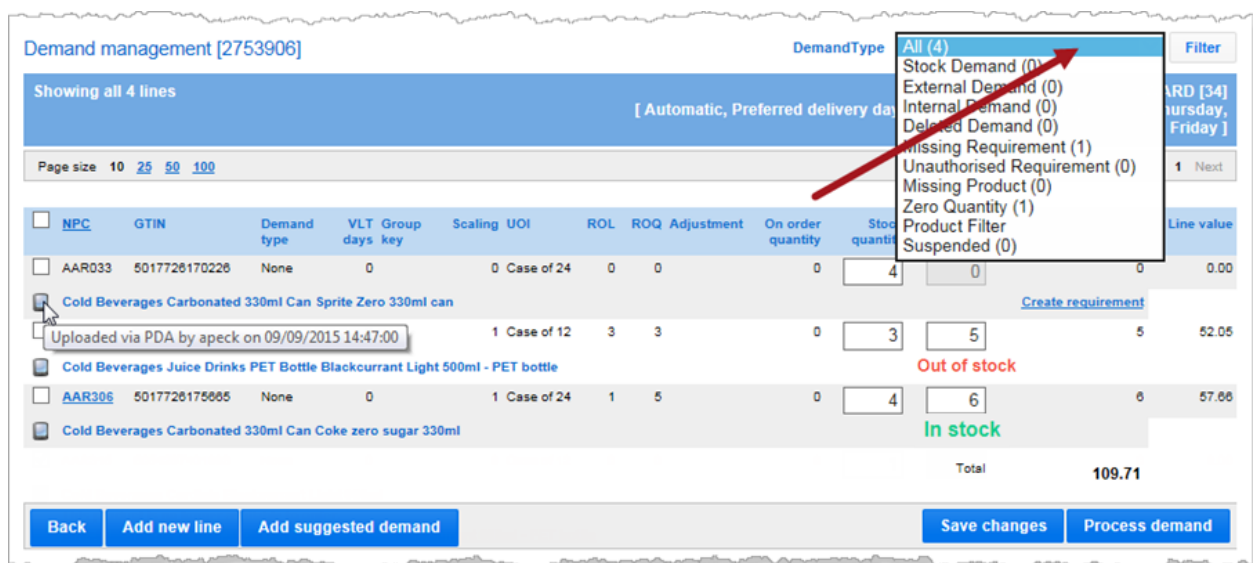
View existing demand

On the right of each row are links to the details of the demand currently recorded for each requisition point.

■ The 'in total' link opens a page showing all of the demand for that requisition point, including those without a corresponding requirement.

■ The 'missing requirements' link opens a page with the demand for that requisition point but *only* shows those without a corresponding requirement.

Click one of these links to open a page showing details of existing demand.

Demand can be created in one of three ways, and an icon on the left of each line shows how that line was added. Hovering the mouse cursor over the icon shown when it was created, as can be seen in the example above.

The three methods of specifying demand are:

Automatically, from stock levels captured using the PDA and other information held in the system (see 'Create demand automatically', below).

Manually in the web application (see page 140).

Using the PDA (see page 109).

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 it.

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.

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Create demand automatically

After capturing current stock levels using the PDA and uploading the information to the system, you can create demand automatically by clicking Add suggested demand at the bottom of the page.

The replenishment method you are using for this requisition point (see 'Replenishment methods' on page 28 for an explanation of replenishment methods) and your current stock levels are used to automatically generate the appropriate quantities to order.

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.
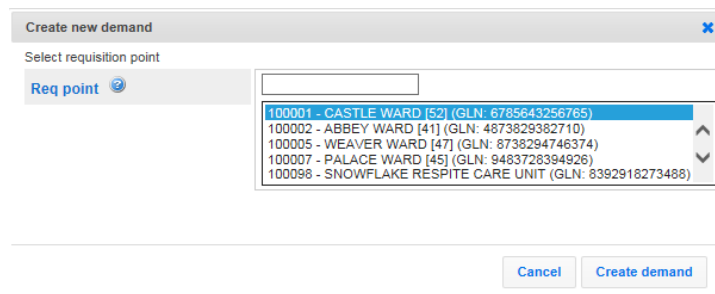
Create demand manually in the web application

You can create demand manually on the website for any requisition point.

If the requisition point already has some demand associated with it, you can click the 'in total' link on the right of the row containing it and skip steps 1 to 3 below.

107 From the Demand summary page, click Create new demand at the bottom right corner.

108 Select the appropriate Requisition point from the list displayed.
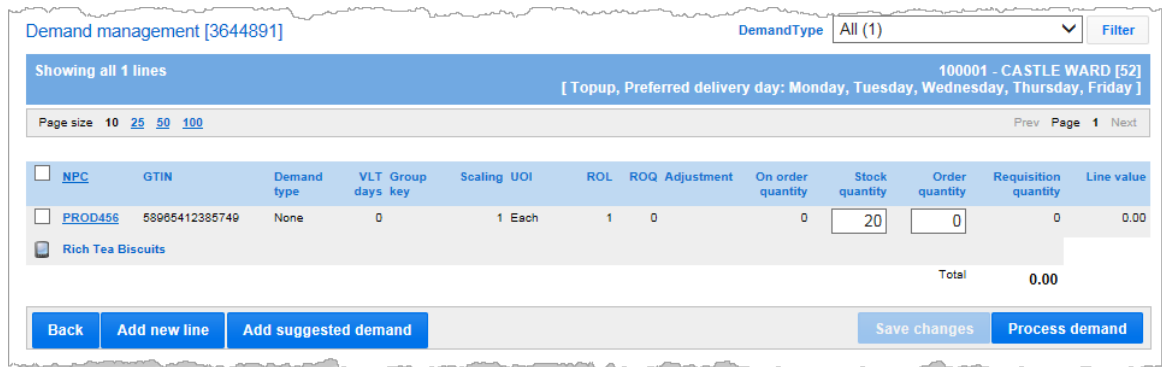
You can jump to the requisition point you want by starting to type its name or code into the box above the list.

109 Click Create demand.

The Demand management page opens. This page is empty if there is no existing demand for this requisition point.

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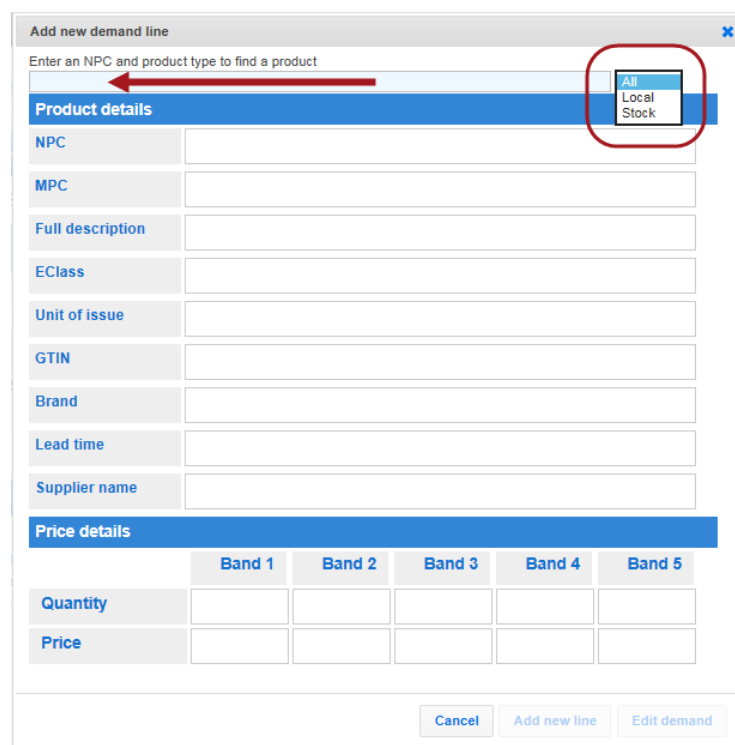
110 Click Add new line.

111 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.
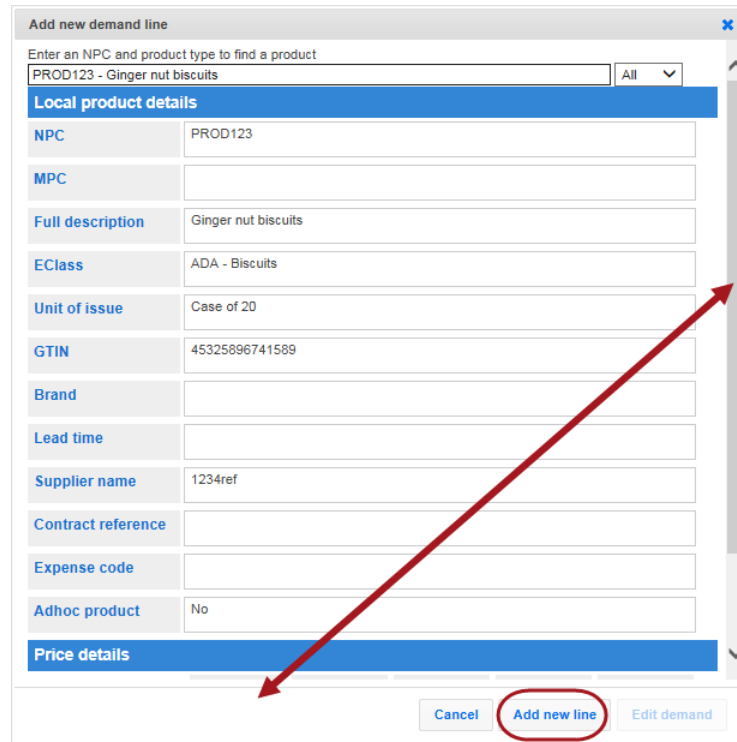
112 Select the product from the list of possible matches displayed.

Any products shown in blue text already have demand recorded for them.

If you want to make changes to the quantities for a product that already has demand recorded, select it and click Edit demand. The Demand management page opens showing just that product.

113 Check the product is the one you want, using the scroll bar to view Price details, then click Add new line.

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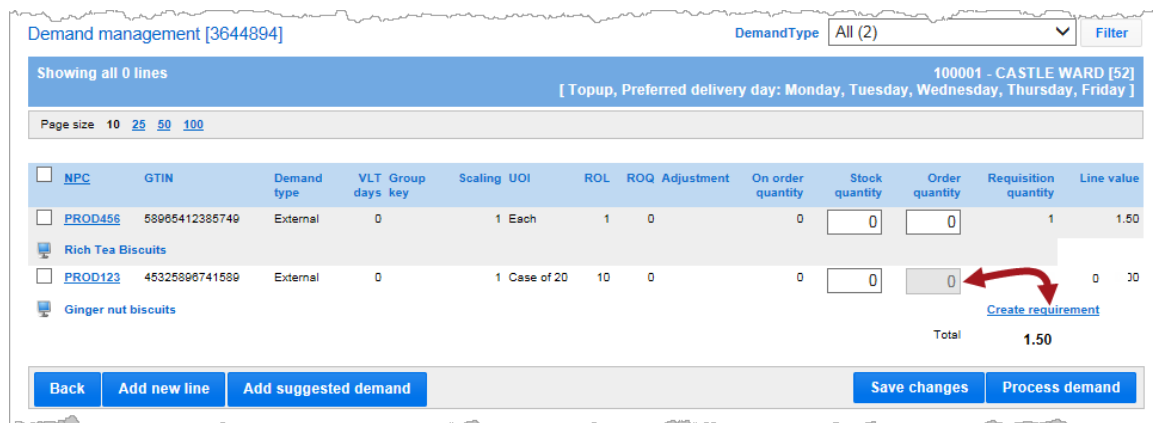
The product is added to the Demand management page.

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.

114 If a Create requirement link exists, click it if you want to create a requirement now.

- You *must* do this if your requisition point uses either 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 147.

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If you do not want to create a requirement, go to step 116.

115 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.

116 Update the Order quantity (and Stock quantity, if appropriate).

117 Click Save changes.

Deleting demand

To remove demand for a product so it is not included in an order generated from the current demand, select the box to the left of the product code. Demand marked for removal in this way is shown in red text and will be deleted when the demand is processed.

	NPC	GTIN	Demand type	VLT days	Group key	Scaling	UOI	ROL	ROQ	Adjustment	On order quantity	Stock quantity	Order quantity	Requisition quantity	Line value
☐	PROD456	58965412385749	External	0		1	Each	1	0		0	0	0	1	1.50
	Rich Tea Biscuits														
☑	PROD123	45325896741589	External	0		1	Case of 20	10	0		0	0	0	10	0.00
	Ginger nut biscuits														

If you change your mind, click the box again to remove the tick.

Lines are automatically marked for deletion if they have been created following the uploading of stock check data from the PDA.

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.

Demand management [3649234]   DemandType All (1) ▼ Filter

Showing all 0 lines   100001 - CASTLE WARD [52]
[Topup, Preferred delivery day: Monday, Tuesday, Wednesday, Thursday, Friday]

Page size 10 25 50 100
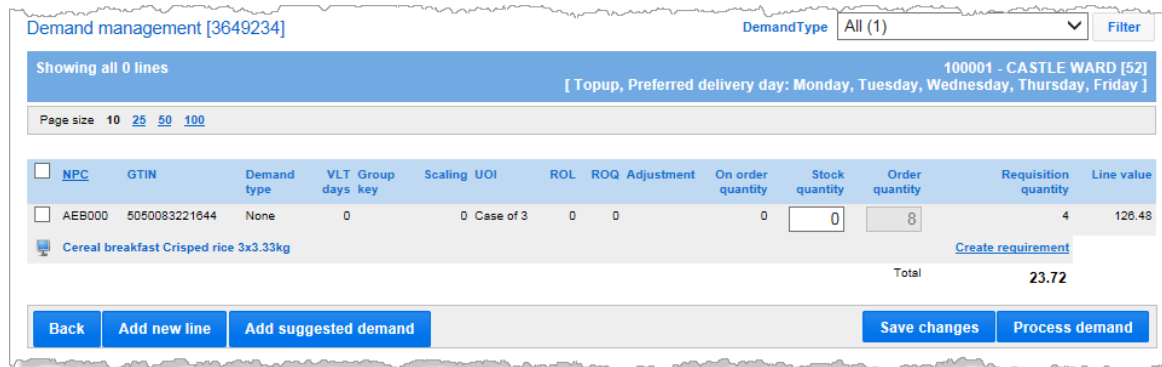
	NPC	GTIN	Demand type	VLT days	Group key	Scaling	UOI	ROL	ROQ	Adjustment	On order quantity	Stock quantity	Order quantity	Requisition quantity	Line value
☐	AEB185	7613035710733	Stock	0		2	Case of 6	2	0	Scaled	0	0	4	2	23.72

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
Indirect alternative: AEB000 Cereal breakfast Crisped rice 3x3.33kg
Indirect alternative: AEB154 Cereal breakfast Rice Krispies 12x510g

Total   23.72
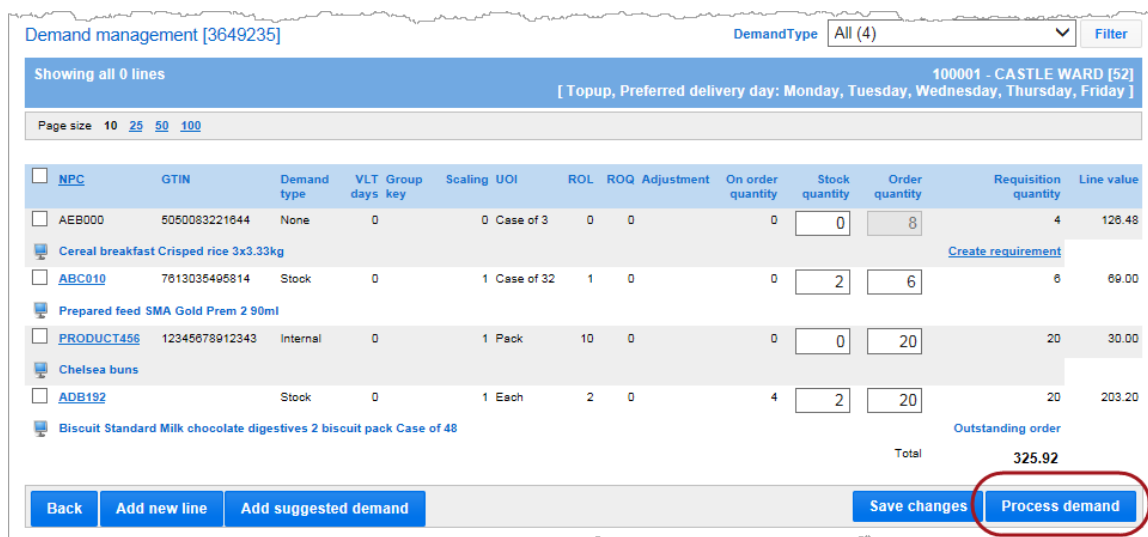
Back   Add new line   Add suggested demand   Save changes   Process demand

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If you click the link to the alternative product, it replaces the original and the Order quantity is adjusted to meet existing requirements for the alternative product.

If there is no existing requirement for the alternative product, a link to create one is shown.

Creating a requisition (order) from the demand

Once you have validated all the demand information and made any necessary changes, click Process demand to send the requisition to NHS Supply Chain or your Purchase Order system.

A page is displayed that 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 gives you the option to delete other items that cannot be processed.

If this page has been populated following the upload of a stock check from the PDA, all items are marked for deletion.

From here you can:

■ Print a summary of your requisition – see 'Printing a summary of the demand', below.

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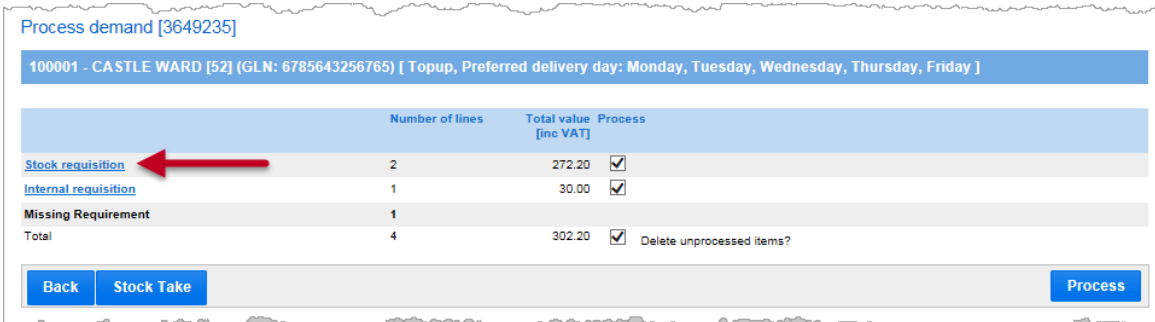
- Use the information stock-taking purposes, to create a stock report – see 'Stock levels from demand' on page 147.

- Process the demand to create requisitions (orders) from it – see 'Process the requisitions' on page 145.

You can do all of 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 type of requisition (the arrow in the example below is pointing to the Stock requisition link).

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

Process the requisitions

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

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You can choose not to process orders of a particular type by clicking the relevant box in the Process column to remove the tick.

The system generates an order number with an 'M' suffix (see example below) for stock orders.

Deleted demand includes any demand that is manually flagged for deletion (see 'Deleting demand' on page 143). It may also include any demand that has an invalid catalogue record or a zero order quantity.

For requisition points using the automatic or top up replenishment methods, demand without an associated requirement or where the requirement is unauthorised cannot be processed.

If any of these conditions exist, they are shown on the Process demand page (the example below shows that two lines do not have associated requirements – the requisition point is using the top up replenishment method).

There is no box in the Process column to the right of that row, but to the right of the Total row is an option to Delete unprocessed items.

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- 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).
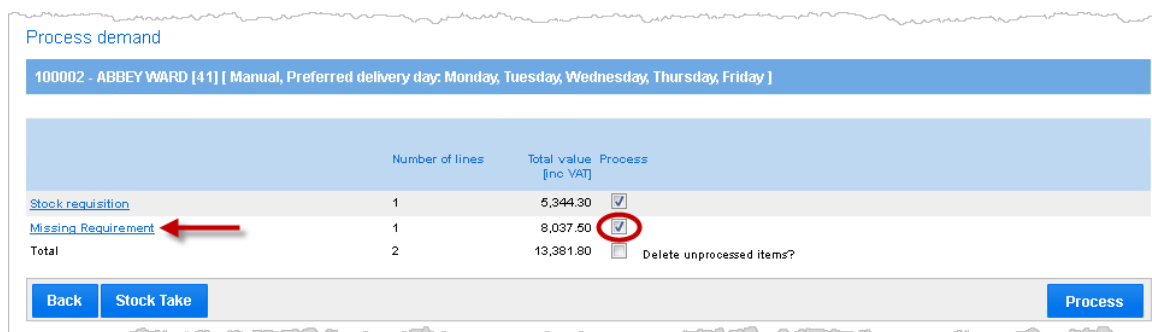
Creating an ad hoc order for demand without a requirement

You can only create an ad hoc order for demand without a requirement if the requisition point is using the manual replenishment method.

If you have created demand without an associated requirement for a requisition point using the manual replenishment method, an option to process that demand **is** given.

If you do not choose to delete unprocessed items for a requisition point using the manual replenishment method, any products that are not authorised or do not have associated requirements are classed as ad hoc requirements.

These ad hoc requirements are saved in the Saved order option in the My orders menu of the 'Online Catalogue' application, where you can update them and complete processing.

All processed demand can be seen in the Online Catalogue application, where its progress can be followed. See the section entitled 'Tracking an order' in the *Guidance Notes for Online Catalogue* for information.
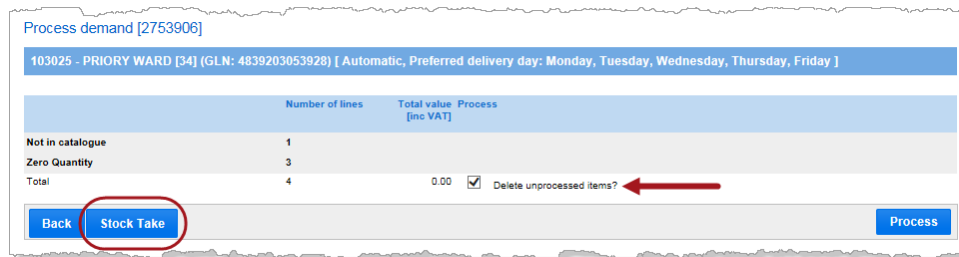
Stock levels from demand

All of the information available on the Demand management page (see page 138) can be used in a stock take report (see 'Stock take report' on page 173).

Once you are sure that 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.

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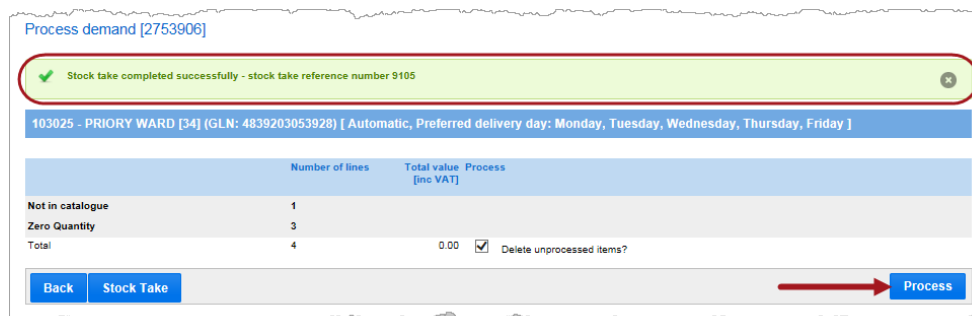
Click Stock Take to use the information you have captured as a record of your current stock levels.

Stock Take takes a snapshot of current stock levels – it does not affect the data.

A message is shown at the top of the page that gives the stock take reference number, and the figures are shown in the Stock Take report.

Click Process to automatically delete the information on the Demand Summary page.

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 144 for more information.

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Managing stock levels and movements (G)

eDC Gold enables you to record stock levels and movements of stock 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 functions within eDC to manage stock movements within your organisation. All of the available options are listed in the Stock menu, in the Stock management group.
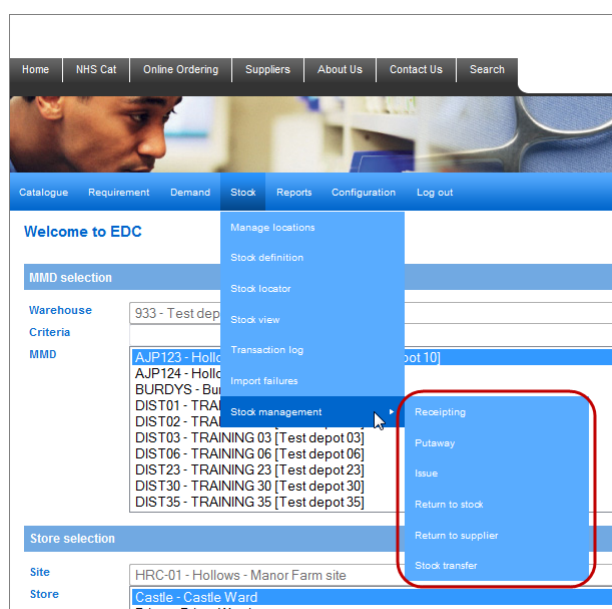
- Receipting enables you to record that goods have been delivered to the organisation – if you do not choose to 'put them away' at this time, they are classed as being located at GOODS INWARD. (See page 150.)

- Put away records the location of the goods when put into their stock locations – you can combine this function with 'receipting'. (See page 152.)

- Issue notes when goods are used (no longer in stock). They can be issued to a named department or an individual. (See page 154.)

- Return to stock enables you to put previously issued products back into stock (see page 155), from where you can re-issue them, transfer them or send them back to the supplier.

- Return to supplier also reduces current stock levels, but by returning to the supplier instead of by issuing stock. (See page 156.)

- Stock transfer enables you to move stock between locations. (See page 156.)

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You can optionally choose to track products by serial number, batch number and expiry date. See page 151 for more information.

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.
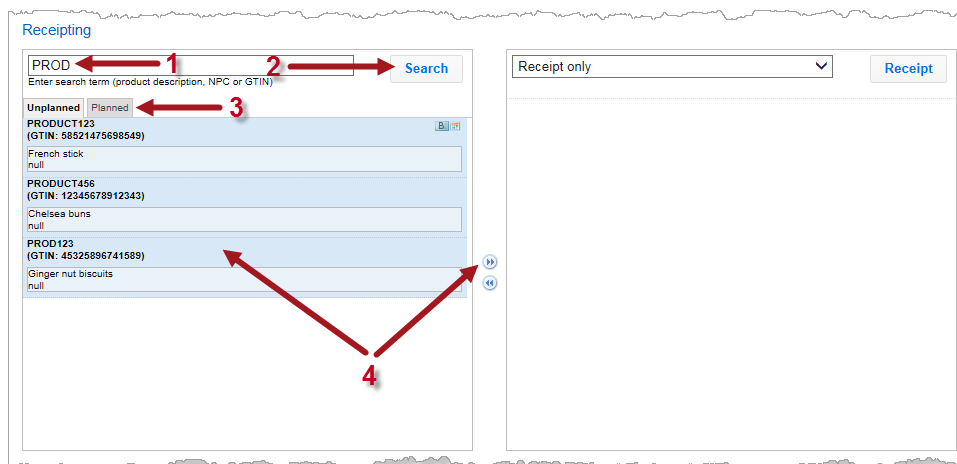
Expected incoming stock is shown in the Planned list for the length of time specified for that store (see 'Creating a store (G)' on page 68). After that time, the stock has to be receipted as Unplanned.

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 152 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 152 for more information.

2   Click Search.

3   Specify whether you are recording the Unplanned or the Planned receipt of products by choosing the appropriate tab.

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 receipt of stock and, holding down your mouse button, drag it into the box on the right.

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- Use the upper button between the two boxes to move *all* of the products to the list on the right.

To remove all products from the list on the right, click the lower of the two buttons between the boxes. To remove a single product, click the cross in the top right of its box.
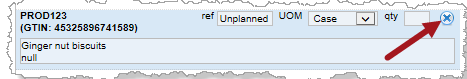
5   Repeat from step 1 to find all other products you want to receipt.

6   Select either Receipt only or Receipt and put away from the list of options.

7   For planned receipts, ref contains the order number. For unplanned receipts, optionally type a reference.

8   Specify the unit of measure (UOM), which defaults to the receivable UOM, and record the quantity (qty) you have received.

9   Click Receipt.
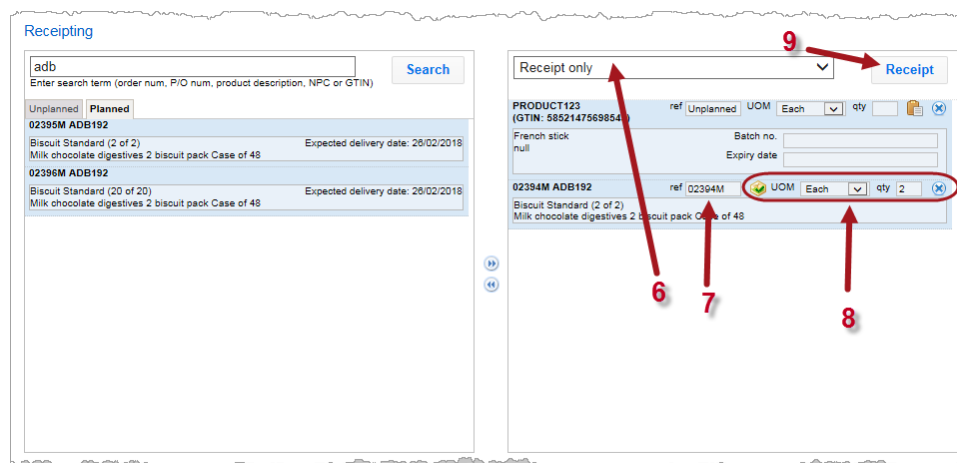
Monitoring expiry dates, serial numbers and batch numbers (G)

If you are monitoring expiry dates, serial numbers or batch numbers (specified as part of the product definition – see page 73), icons are shown to indicate what is being tracked:

|		
S	serial number is being tracked	
B	batch number is being tracked	
	expiry date	
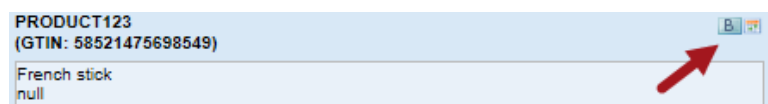
Boxes are provided when processing the product for including the information required:

- If you are tracking serial numbers, you must enter a serial number for each item in the group. The example below shows three serial numbers have been recorded for this product.
  - You can add more by typing in the box indicated by the arrow.

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- You can delete a serial number if you have added one by mistake by clicking the pink circle containing the cross (⊗).

The quantity for this product is automatically set to the number of serial numbers recorded for it. Click OK.
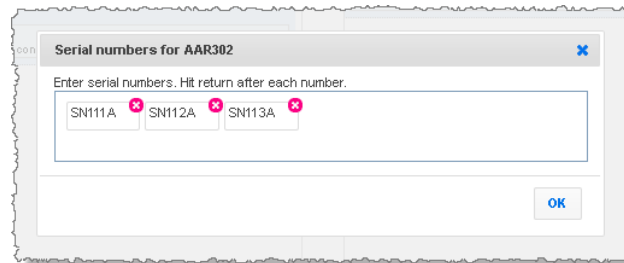
- If you are tracking Batch no. or Expiry date, boxes are displayed for this information to be recorded.
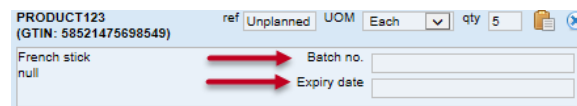
The example above shows the quantity (qty) and Serial no. information that was entered when recording serial numbers. This is for illustration only: serial numbers would not normally be recorded for this type of product.

If you enter an expiry date that is sooner than the minimum shelf life specified for this stage, a message is displayed to warn you that the shelf life is short.

- The paste icon (📋) enables you to create another entry for the same product so you can specify different information (such as different batch numbers).

Planned receipting (G)

Additional reference numbers may be shown to the right of the order number (A in the image below):

- The current order number is shown first. If this is a computer generated order – created for items with a lead time longer than the standard 48 hours - the number has a 'C' suffix. In this case, the original order number immediately follows in brackets.

- The purchase order number, if any, is shown last. This is only applicable for Blue Diamond and eDirect orders when a purchase order has been generated to fulfil the order.

You can search for an order using the purchase order number or sales order number, 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 actually 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 are expecting a further delivery to complete this order, click the 'Delivery complete' icon to remove the tick (E).

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If you then receive the rest of the order, you can search for the product again. This time the number shown (A in the example below) reflects that you are only expecting 1 from an original order of 2.

If you only receive a part order but are not expecting any more, you can specify the number you actually receive (B) but leave the icon to indicate that the order is complete (C). This particular order is no longer included in the list of matches for planned receipting.

Put away stock (G)

If you did not choose to 'receipt and put away' as a single process, you have to put your stock away by selecting Stock, then Stock management and finally Put away from the menu.

All of the stock available to put away is listed on the left. These are all the items that have been received (receipted) but have not yet been put away.

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252 Click and drag the item from the list on the left to the list on the right. The heading for the item remains on the left but the details move to the right.

253 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 of a product now, it will be listed with the remaining quantity the next time you select Put away from the menu.
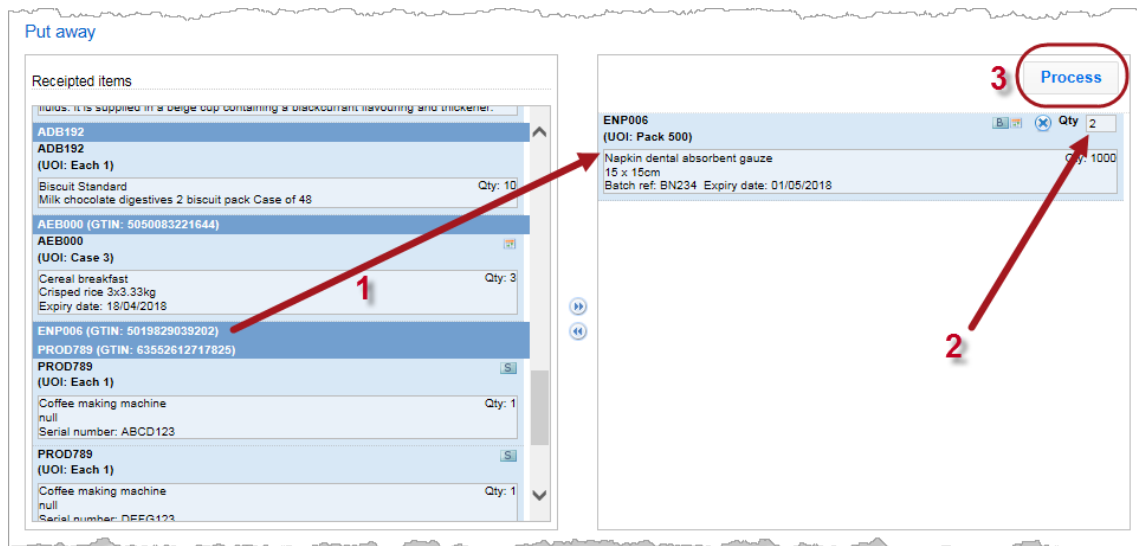
254 Click Process.

If you are monitoring expiry dates, serial number or batch number, 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 is the process of taking products out of the store area and passing them to the end user or local department. From this point, you cannot track them using eDC, although you can return them to stock if they are no longer required.

You can only issue stock to departments or clients who are in the site you selected when you logged on to eDC Gold.
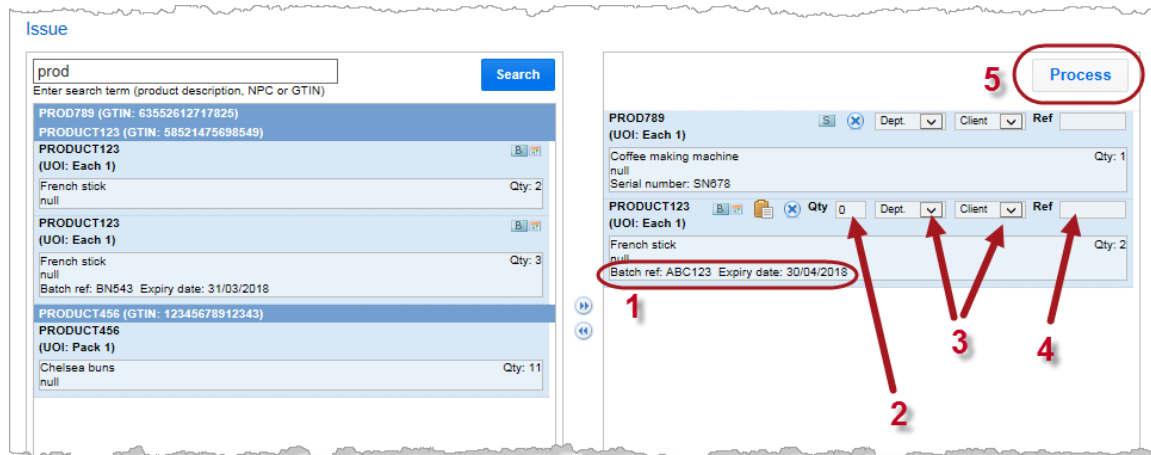
To issue stock, select Stock, then Stock management and finally Issue from the menu.

255 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).

Make sure that you have selected the right product(s) if serial numbers, batch numbers or expiry dates are being monitored – 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

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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.

256 For each product, specify the quantity (Qty) that you are going to issue to this client or department.

257 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.

258 Optionally give this transaction a reference.

259 Click Process to issue the stock.
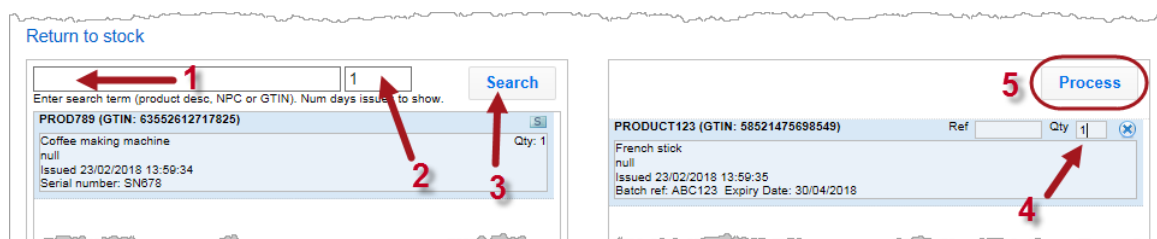
You cannot issue more of a product than you have in stock.

Return to stock (G)

The return to stock option is available from the Stock menu. Select Stock management and then Return to stock.

260 Search for the product code you want to return to stock.

261 Choose how many days results you want to show (1 means just show today's, 2 means show today's and yesterday's issues and so on).

262 Click Search.

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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).

263 State the quantity (Qty) you are returning to stock.

264 Click Process.

The quantity you returned is now available for re-issue or for returning 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:

265 Find it in the list on the left (see steps 260 to 262 of 'Return to stock (G)', above) and drag it into the box on the right.

266 Specify the quantity (Qty) you want to return.

267 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 159).

The value at the top of the list – Expired – is selected automatically. Change this if it is not the correct reason.
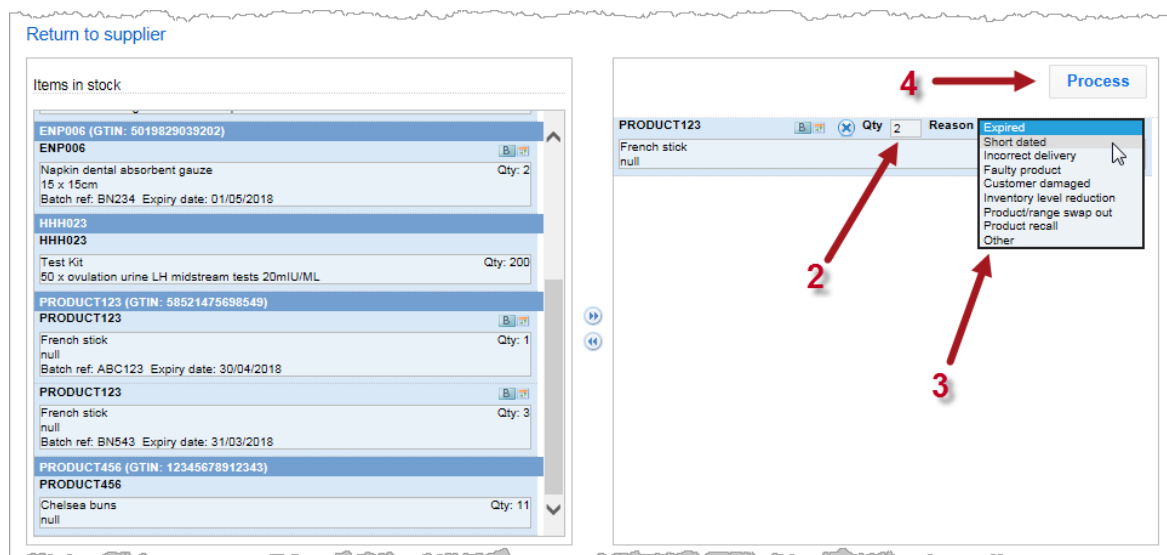
268 Click Process to remove selected products from stock.

Stock transfer (G)

You can transfer stock between sites and stores as long as:

- They are associated with the same MMD.

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- 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:
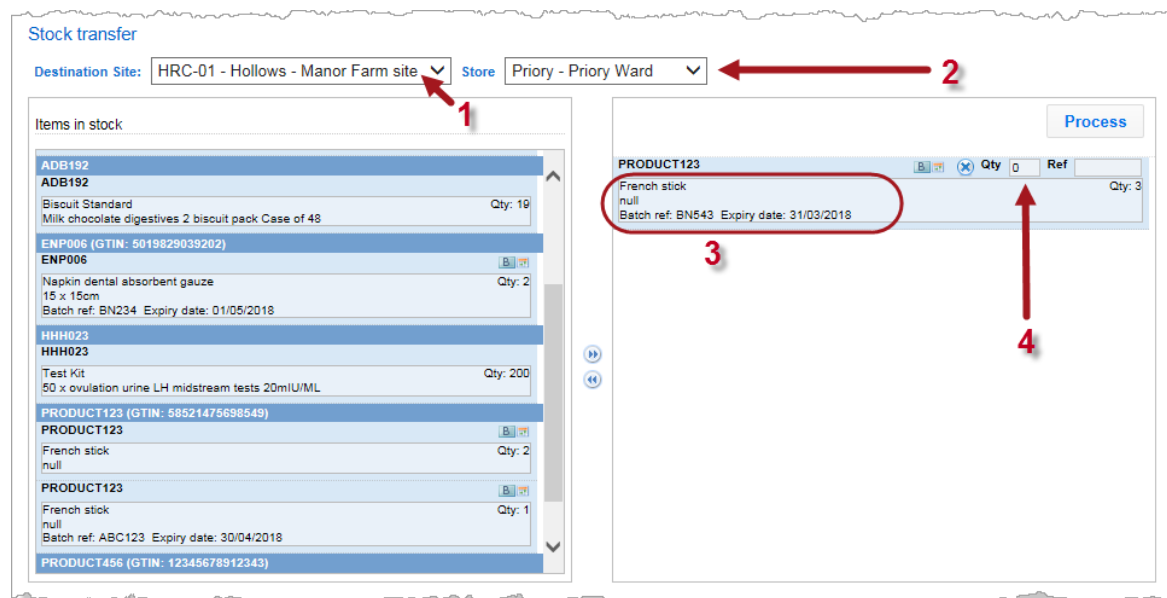
269 Select the Destination Site from the drop down list.

270 Select the Store – if there is only one store at the selected site, this is automatically displayed and cannot be changed.

271 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).

272 Specify the quantity (Qty) to transfer.

273 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.

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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 74).

- 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.
🟢	Current stock level alone is at the maximum stock level or reorder level (whichever is applicable), or higher.

The totals at the bottom of each page are the totals for that page – if you have more than one page of results available, this is not an overall total.

The information on this summary page includes the NPC of the product as a link. Click this to see some details about this stock definition, as shown in the example below.

- The top of the page shows basic information about the product.

- The centre section specifies where different batches (based on expiry date and serial number) are held.

🔴	The expiry date has passed.
🟠	The expiry date is within the timeframe specified for the shelf-life warning (for example, the expiry date 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.

Stock view

Product details

NPC	PRODUCT123
Product type	Local
Description	French stick
Secondary description	

Group 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 25 50 100   Prev Page 1 Next

Back

Monitoring transactions (stock movements) (G)

To see an itemised list of the transactions that have been made, select the Stock menu and then 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 actually performed the transaction.

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Transaction log

Date from		Date to		NPC/GTIN			Type	None		Search

Search results													Showing 1 - 10 of 129 results

Page size 10 25 50 100   Prev Page 1 2 3 4 5 6 7 8 9 10 Next >>

NPC GTIN	Product type	Transaction type	Department	Local reference	Client ID	Group key	Quantity	Expiry date	Batch ref.	Serial number	Unit cost	Transaction value	VAT rate	Date	Transacted by
PRODUCT123 58521475698549	Local	Receipt		Unplanned			5	23/02/2018	BN22		1.20	6.00	0	23/02/2018 14:22:44	Alison Peck
PRODUCT123 58521475698549	Local	Putaway		Putaway			5	23/02/2018	BN22		1.20	6.00	0	23/02/2018 14:22:44	Alison Peck
PRODUCT123 58521475698549	Local	Receipt		Unplanned			3	28/02/2018	BN11		1.20	3.60	0	23/02/2018 13:59:35	Alison Peck
PROD789 63552612717825	Local	Issue		SLT123			1			SN678	234.56	234.56	0	23/02/2018 13:59:34	Alison Peck
PRODUCT123 58521475698549	Local	Receipt		Unplanned			3	31/03/2018	BN543		1.20	3.60	0	23/02/2018 13:53:39	Alison Peck
PRODUCT123 58521475698549	Local	Putaway		Putaway			3	31/03/2018	BN543		1.20	3.60	0	23/02/2018 13:53:39	Alison Peck
PROD789 63552612717825	Local	Receipt		Unplanned			1			SN678	234.56	234.56	0	23/02/2018 13:53:23	Alison Peck
Total							27					499.12			

Page size 10 25 50 100   Prev Page 1 2 3 4 5 6 7 8 9 10 Next >>

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 fail from the PDA. For example, you may attempt to issue more stock than you currently have and because this issue cannot be resolved automatically, the transaction fails.

A failed transaction log is available from the Stock menu: select Import failures from the menu and all outstanding failed transactions are listed.

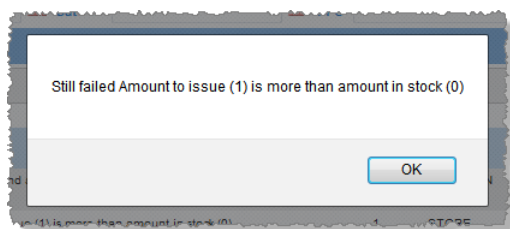- You can filter the display by date range, by NPC and by Type (by selecting from the drop down list).

- You can order the display by clicking any of the column headers, with the exception of 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.

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Still failed Amount to issue (1) is more than amount in stock (0)

OK

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.)

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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.
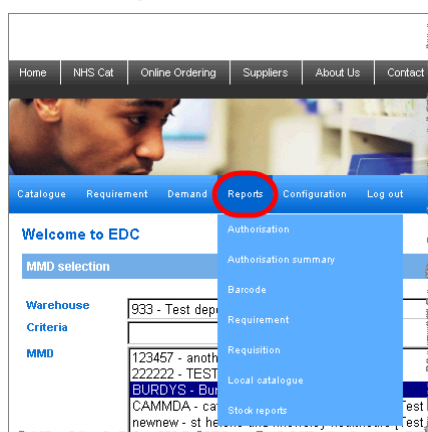
Authorisation report

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 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 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:
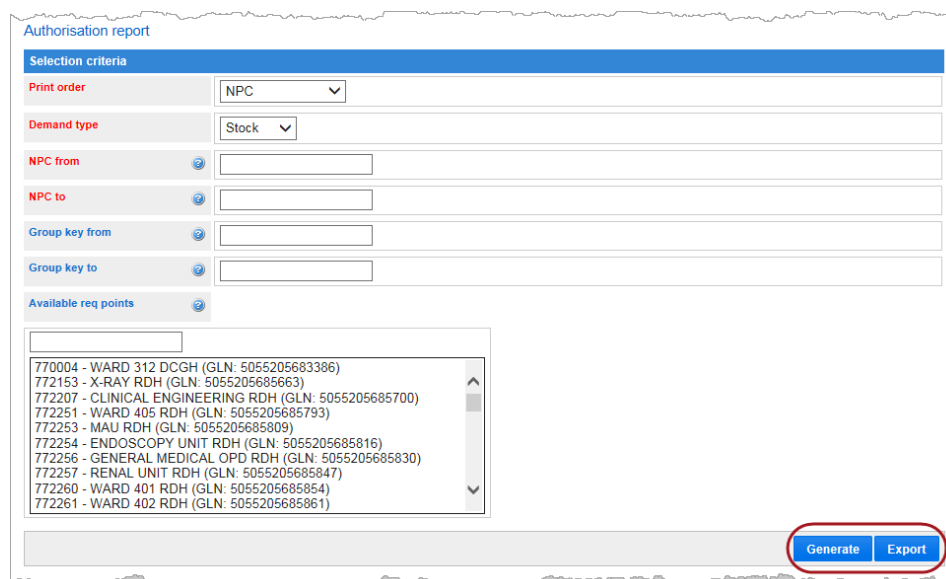
- How the report should be ordered, by selected the Print order from the drop down list.

- 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.

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- 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 screen. You can print the report if required.

To export the report directly to Microsoft Excel, click Export.

Authorisation report

Selection criteria

Print order	NPC
Demand type	Stock
NPC from	
NPC to	
Group key from	
Group key to	
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: 5055205685793)
772253 - MAU RDH (GLN: 5055205685809)
772254 - ENDOSCOPY UNIT RDH (GLN: 5055205685816)
772256 - GENERAL MEDICAL OPD RDH (GLN: 5055205685830)
772257 - RENAL UNIT RDH (GLN: 5055205685847)
772260 - WARD 401 RDH (GLN: 5055205685854)
772261 - WARD 402 RDH (GLN: 5055205685861)
```

Generate   Export

The authorisation report contains the following information.

- The MMD number and name, the requisition point number, name and GLN for which the report has been generated, and the method of data capture are shown in the report heading on each page.

- The body of the report lists each product and shows details for each of them. An example of an authorisation report is shown below.

This example report contains 48 pages – it was generated for a number of requisition points, and each requisition point begins on a new page.

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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 screen (from where you can print it), or Export to export the information to Microsoft Excel.

A sample of an Authorisation Summary Report is shown below:

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EDC - Authorisation Summary Report

NHS

NHS Supply Chain

GENERAL MEDICINE DCGH

Req point	Req point name	GLN	Total lines	Total value
772153	X-RAY RDH	5055205685663	311	5,786.36
772251	WARD 405 RDH	5055205685793	478	3,064.10
772253	MAU RDH	5055205685809	526	20,230.25
770004	WARD 312 DCGH	5055205683386	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 bar code templates:

- Bin labels
- Bin labels with requisition point barcodes
- Catalogue sheets

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.

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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.
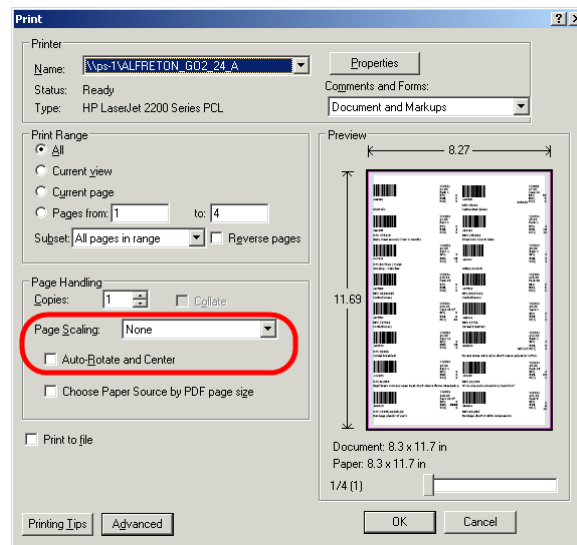

The barcodes will look similar to the small example below.

You can print the barcodes by using the standard Print option.

When printing barcodes, make sure that Page Scaling is set to None and that Auto-Rotate and Center is *not* selected. Check also that the paper size for the printer (in Properties) is set to A4.

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Requirement report

This report summarises 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 are in line with the NHS Financial calendar, which is published on the NHS Supply Chain website.

1 Choose whether you want the report ordering by NPC, by Description or by GTIN by selecting the appropriate option from Print order.

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).

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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 53) are highlighted with an asterisk.

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EDC - Requirement report

NHS Supply Chain

AJP123 Hollows Respite Care Unit
100001 - CASTLE WARD [52] [Top up] (GLN: 6785643256765)

NPC	Brand	UOI	Previous monthly issue quantity							Requirement			Av weekly summary	
			7-12	6	5	4	3	2	1	ROL	ROQ	MSL	Value	Issue
PROD123 (GTIN: 45325896741589) Ginger nut biscuits		Case 20	0	0	0	0	0	0	0	10	-	10	0.00	0.00
PROD456 (GTIN: 58965412385749) Rich Tea Biscuits		Each	0	0	0	0	0	0	0	1	-	1	0.00	0.00
PROD789 (GTIN: 63552612717825) Coffee making machine		Each	0	0	0	0	0	0	0	1	-	1	0.00	0.00
PRODUCT123 (GTIN: 58521475698549) French stick		Each	0	0	0	0	0	0	0	10	-	10	0.00	0.00
PRODUCT456 (GTIN: 12345678912343) Chelsea buns		Pack	0	0	0	0	0	0	0	10	-	10	0.00	0.00
PRODUCT789 (GTIN: 58967415896239) Lemonade - no sugar		Bottle	0	0	0	0	0	0	0	24	-	24	0.00	0.00

6 products for 100001 - CASTLE WARD [52] [Top up] (GLN: 6785643256765)   Average weekly totals: 0.00   0.00

If you export the file to Microsoft Excel, the group key, maximum stock level, brand and MPC are included.

Requisition report

1 Select the Report type from the drop down list. This is based on the category of products being requisitioned.

2 Select the order in which you want the information displayed by selecting an option from the drop down list in Print order.

3 You must specify Demand created from and Demand created to dates by clicking on the calendar icon and selecting appropriate dates.

4 Select the requisition points to be included from the list in Available req points.

5 Click Generate to display the report on screen (it can be printed). Click Export to export the information to Microsoft Excel.

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The non-stock report sub-totals by supplier.

Local catalogue report

This report displays a list of an organisation's local products.

1 Select Local catalogue from the Reports menu.

2 Choose the order in which you want the information displayed from the drop down list.

3 Specify the NPC codes to include in the report:

- If your NPC codes run from A to Z, type **A** in NPC from and **Z** in NPC to – this includes the full range.

- If any of your codes begin with numbers, type **0** in NPC from and **Z** in NPC to – this includes all codes.

4 Click Generate to display the report on screen (it can be printed). Click Export to export the information to Microsoft Excel.

An example of a local catalogue report is shown below.

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EDC - Local catalogue report

NHS

NHS Supply Chain

GENERAL MEDICINE DCGH

NPC	Base description	Supplier ref	Supplier	UOI	Price	E-class	Expense code
AA029 (GTIN: 7483738473828)	NURSING DUTY ROTA			Each 1	0.00		
AA041 (GTIN: 64738273645366)	SENSITIVE/ALLERGIC LABELS			Each 1	0.00		
AA057 (GTIN: 57483928374657)	PEAK FLOW			Each 1	0.00		

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Stock reports

All stock reports are available from the Stock reports option on the main Reports menu.

When relevant criteria have been specified, you can:

- Generate a PDF for viewing on screen or printing.
- Export the data in a format suitable for opening in Excel.
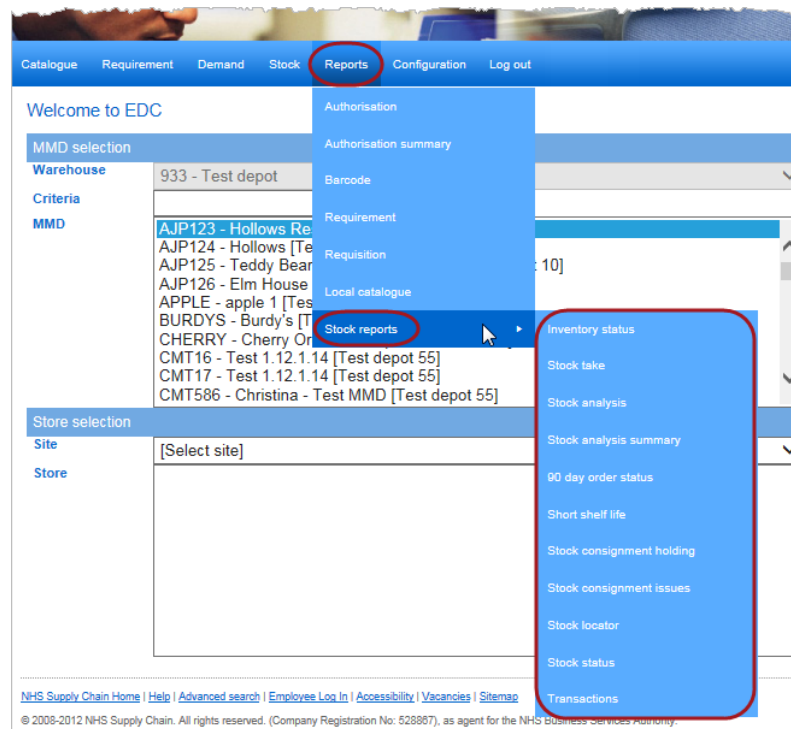
Inventory status report

The 'Inventory status report' shows the value of items waiting to be processed in demand management. This report is for organisations using automatic or top up replenishment.

To run this report, select Reports, then Stock reports and finally Inventory status from the menu.

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

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NHS Supply Chain
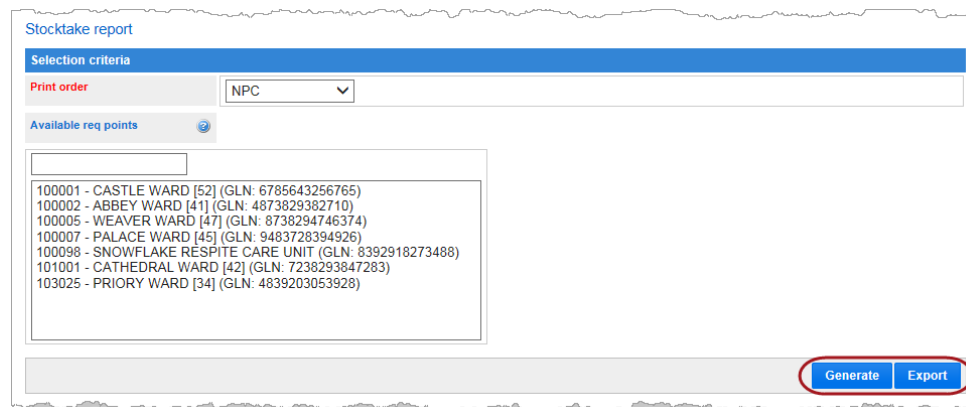
Stock take report

The stock take report shows the value of items captured during a stock.

Select Reports, then Stock reports and finally Stock take from the blue menu.

Select the Print order for your report from the drop down list. You can order it by NPC, by Base description or by GTIN.

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

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

In the exported version of the report the types Stock, External and Internal are expressed in two columns:

Local Item	Internal	Equals:
TRUE	TRUE	Internal
FALSE	FALSE	Stock
TRUE	FALSE	External

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Stock analysis report

This report is based on the last 26 weeks of issues and displays weeks cover and stock turn calculations at product level within 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.

EDC - Stock analysis report

NHS Supply Chain

DB0720 GENERAL MEDICINE DCGH
770004 - WARD 312 DCGH [Manual] (GLN: 5055205683386)

NPC	Brand	UOI	ROL	Requirement ROQ	MSL	Scaling	Stock value	Average weekly summary Value	Issue	Cover	Stock turn
EDB008 (GTIN: 4049500266451) Bandage conforming type 1 dressing retention 6cm x 4m Knitted	Hospiform	Pack 20	-	-	-	-	0.00	0.04	0.02	-	-
EDB067 (GTIN: 4042809265279) Bandage conforming type 1 dressing retention 10cm x 4m Knitted	EasiFix K	Pack 20	-	-	-	-	0.00	0.23	0.08	-	-
EDB237 (GTIN: 4049500266475) Bandage conforming type 1 dressing retention 10cm x 4m Knitted	Hospiform	Pack 20	1	1	2	1	6.20	0.20	0.08	26.00	2.00
EDB239 (GTIN: 4049500266482) Bandage conforming type 1 dressing retention 12cm x 4m Knitted	Hospiform	Pack 20	-	-	-	-	0.00	0.08	0.02	-	-
4 products for 770004 - WARD 312 DCGH [Manual]							6.20	0.55	0.19		

Stock analysis summary report

This report is based on the last 26 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:

118 Select the Reports option on the blue menu, then Stock reports and finally Stock analysis summary.

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

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EDC - Stock analysis summary report

NHS Supply Chain

DB0720 GENERAL MEDICINE DCGH

	Stock level	Stock value	Average weekly summary			
			Value	Issue	Cover	Stock turn
770004 - WARD 312 DCGH (GLN: 5055205683386)	1,089	4,019	795.06	197.94	5.50	9.45
772153 - X-RAY RDH (GLN: 5055205685663)	1,962	7,506	3,125.96	837.37	2.34	22.19
772207 - CLINICAL ENGINEERING RDH (GLN: 5055205685700)	0	0	1,736.58	8.73	0.00	0.00
772251 - WARD 405 RDH (GLN: 5055205685793)	1,528	9,738	1,457.80	439.62	3.48	14.96
772253 - MAU RDH (GLN: 5055205685809)	6,981	78,669	2,887.07	1,050.06	6.65	7.82
772254 - ENDOSCOPY UNIT RDH (GLN: 5055205685816)	1,018	3,207	1,922.32	459.21	2.22	23.46
Totals	12,578	103,139	11,924.77	2,992.92		

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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.

90 day order status (G)

The 90 day order status report runs for the store you are currently associated with. It looks at all orders for the last 90 days, and the PDF version is colour coded based on the Order status:

- Lapsed orders (shown in red) are orders that have not been receipted and where the total of the delivery lead time and the receipting lead time has passed.

- Stock due orders (shown in orange) are orders where receipting has not been completed for the order quantity, although partial receipting may have been done.

- Fully receipted orders (shown in green) are orders where either:
  - The expected quantity has been receipted
  - Part of the order has been receipted and it has been marked as complete so no further receipting against this order is possible.

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.

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90 day order status – spreadsheet version (G)

This version of the report contains all of the information in the PDF version, plus:

- Planned expected quantity

- Application name – the name of the application 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, to view it on screen or to print it, or to 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 178.

- Stock with a status of "Red" (shown in red text in the PDF) has already expired.

- Stock with a status of "Orange" (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 value of stock in that status are shown at the end of each section.

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EDC - Short shelf life report

NHS Supply Chain

AJP123 - Hollows Respite Care Unit
103025 - PRIORY WARD [34] (GLN: 4839203053928)
Priory - Priory Ward

NPC	MPC	eClass	Group key	Expiry date	Shelf life warning	Consign	Qty	Unit cost	Total value	Batch ref	Serial numb
Expiry status - Red											
AAR315											
Cold Beverages Cordials Blackcurran Light 600ml				31/01/2013	5	N	2	37.16	6.19	123rty	
AAR315											
Cold Beverages Cordials Blackcurran Light 600ml				28/02/2013	5	N	4	37.16	12.39	123rty	
Expiry status - Red										**18.58**	

   31.72% value % of total value
   23.08% quantity % of total quantity

NPC	MPC	eClass	Group key	Expiry date	Shelf life warning	Consign	Qty	Unit cost	Total value	Batch ref	Serial numb
Expiry status - Amber											
PRODUCT789	AAD										
Lemonade - no sugar (GTIN: 58967415896239)	Supplier123			28/02/2018	28	N	10	2.00	20.00		
Expiry status - Amber										**20.00**	

   34.14% value % of total value
   38.46% quantity % of total quantity

NPC	MPC	eClass	Group key	Expiry date	Shelf life warning	Consign	Qty	Unit cost	Total value	Batch ref	Serial numb
Expiry status - Green											
PRODUCT789	AAD										
Lemonade - no sugar (GTIN: 58967415896239)	Supplier123			21/03/2018	28	N	10	2.00	20.00		
Expiry status - Green										**20.00**	

   34.14% value % of total value
   38.46% quantity % of total quantity

4 products for 103025 - PRIORY WARD [34]   58.58
4 products in total   58.58

Page 1 of 1

Short shelf-life report – spreadsheet version (G)

The spreadsheet version of the report contains everything in the PDF version plus the following specified as part of the stock definition (see 'Stock definitions (G)' on page 73):

- **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

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Both reports are available from the Stock reports group on the Reports menu. You can Generate the report to create it in PDF format or Export it to obtain the information in a format suitable for opening in a spreadsheet.

Stock locator report (G)

This report can be generated as a PDF or exported as a spreadsheet. Both versions show the quantity and location of stock for the store you are currently associated with. You can specify all or part of the NPC, MPC or Group key.

Multiple rows may be shown for the same product and location (see example below) if there is a difference in Serial number, Batch reference or Expiry date.

Stock status report (G)

The Stock status report shows current stock levels for the store you are currently associated with. You cannot specify any 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.

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Transactions report (G)

The Transactions report enables you to track the movements of stock. The report is available from the Stock reports group on the Reports menu.

This report shows details of the product, the transaction type, the unit cost, the name of the person who performed the transaction, the stock type (whether this is a stock or a local product) and the total value of the products.

To reduce the quantity of information displayed, or to find information on a particular product, various selection criteria are available.

- Transaction type is selected from a list of possible transaction types.

- Specify full or partial NPC, MPC or Eclass codes to search for a particular product or range of products.

- A Batch reference further restricts the search within a product, and Serial number identifies a single item.

- Transaction created from and Transaction created to are both mandatory – you have to enter something to limit the number of results returned.

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

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