Par Carts, InterUnit Transfers, and Material Stock Requests - Fluid

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# Par Carts, InterUnit Transfers, and Material Stock Requests - Fluid

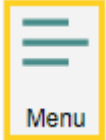## Enter Inventory Order using Pre-Defined Carts

Topic Contents:

1. Navigation
2. Business Units
    a. Warehouse (LKWHS)
    b. Central Supply (LKCMS)
3. Search for Par Location ID
    a. Items cannot be charged to patient accounts
    b. Medical carts
    c. Office carts
    d. Must have one cart for medical and one cart for office supplies
4. Search for cart items
    a. View All
    b. View 8
    c. Find
5. Request Qty
    a. Remove all zeroes and decimal points
    b. Only enter whole numbers (e.g., 1, 2, 3, etc.)
6. Enter additional item(s)
    a. DO NOT Save until all items are entered
7. Save request
    a. Par Count ID will change to next available Order No.
    b. Status will still be Unprocessed

Training Guide
Par Carts, InterUnit Transfers, and Material Stock Requests - Fluid
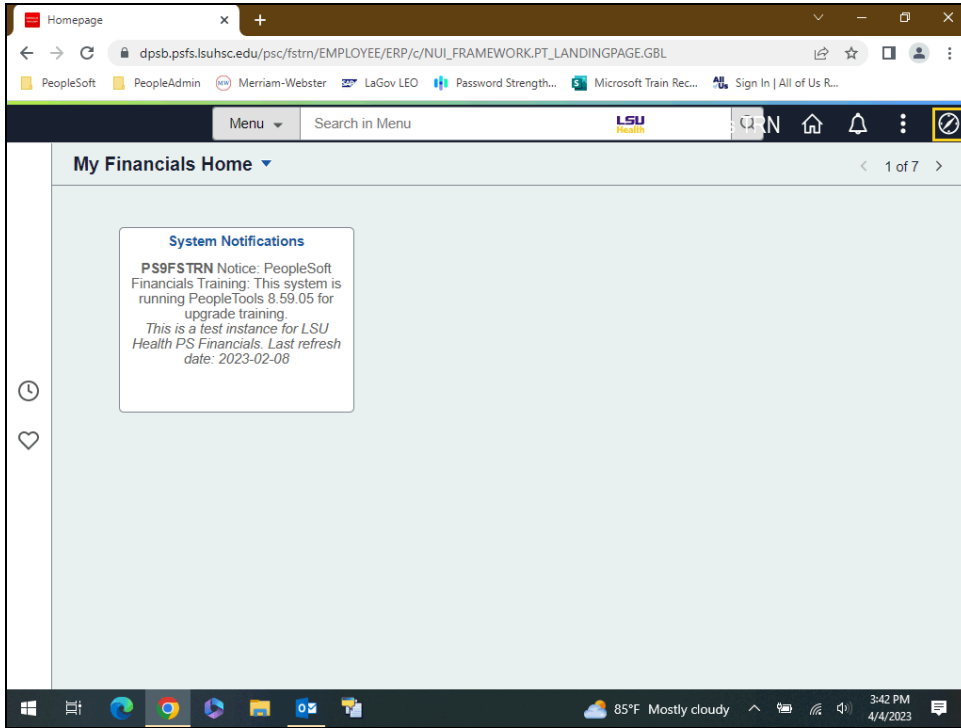
Step	Action
1.	Click the **NavBar** button.
2.	Click the **Menu** button.
3.	Scroll down to '**T**' in the menu to locate the **Inventory** option. Press the left mouse button over the scrollbar and drag the mouse to the desired location.
4.	Click the **Inventory** button.
5.	Scroll down to locate the **Replenish Par Locations** option. Press the left mouse button over the scrollbar and drag the mouse to the desired location.

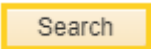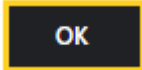| Step	Action
6.	Click the **Replenish Par Locations** button. 📁 Replenish Par Locations ⟩
7.	Click the **Count Par Location Levels** button. ≡ Count Par Location Levels
8.	Pre-defined carts contain medical and office supplies that **cannot** be charged to a patient account. The carts have been created to make it easier for the Warehouse (LKWHS) and Central Supply LKCMS) to issue non-patient medical and office supplies to the departments. *NOTE: Only the Warehouse (LKWHS) or Central Supply (LKCMS) may be used as the Business Unit when creating a request from a pre-defined cart. The LAK Operating Room (LKORU) cannot be used as the Business Unit since supplies from LKORU cannot be issued to other departments.*
9.	You may search for the *Business Unit* using the **Lookup Business Unit** button; or, you may enter directly into the **Business Unit** field. Click the **Look up Business Unit** button. 🔍
10.	In this example, the **Lallie Kemp - Warehouse** option will be selected. Click the **LKWHS - Lallie Kemp - Warehouse** link. LKWHS Lallie Kemp - Warehouse
11.	You may search for the *Par Location ID* using the **Lookup Par Location ID** button; or, you may enter directly into the **Par Location ID** field. Click the **Lookup Par Location ID** button. 🔍
12.	There are two sets of pre-defined carts available: medical supplies and office supplies. The medical supplies options list first, and their Par Location ID starts with LK followed by a two-digit number. Press the left mouse button over the scrollbar and drag the mouse to the desired location.

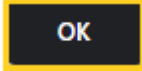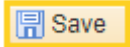| Step	Action
13.	The second set of carts, for office supplies, start with LKOF. *NOTE: Users may not mix medical and office supplies on one cart request. If both are required, two separate cart requests will have to be created.* Press the left mouse button over the scrollbar and drag the mouse to the desired location.
14.	Once selected, the Par Location ID will default into the Par Location ID field. In this example, the **LK04-2047100 - LKWHS 04 Emergency** will be used as the Par Location ID. Click the **LK04-2047100** link. LK04-2047100 LKWHS 04 EMERGENCY
15.	Click the **Search** button. Search
16.	The **Count Par Location Levels** panel opens with the selected cart items displayed. *NOTE: Please verify you are on the correct cart before you proceed.* The **Par Count ID = Next** and the **Status = Unprocessed**.
17.	In this example, there are 52 items defined on the cart. There are three (3) options for finding your item(s) to order: 1. **View** eight **(8)** items per page and navigate through the items page by page; 2. Select the **View All** link and scroll through all 52 items; or 3. Use the **Find** option to search for an item. *NOTE: The system defaults you to the View 8 option.*
18.	In this example you will select the **View All** link, so that you may scroll through all 52 options. Click the **View All** link. View All
19.	All 52 items are listed. A scrollbar displays at the right of the inner panel. Click the **View 8** link. View 8

Step	Action
20.	The original list of 8 items to a page displays. Use the **left** and **right arrows** to navigate between pages, or use the **First** and **Last** links to return the first page or navigate directly to the last page. Click the **Find** link. Find
21.	A search box pop up allows you to search for an item(s) using the **PS #**, the **Catalog #**, or the item **Description**. *If you are on the first page, the item will move to the top of your list.* In this example you will search for an item using the PS # **190664** for GLOVE MED NITRILE PF LTX FREE #14-6976C. Enter the desired information into the **Enter search string:** field. Enter "**190664**".
22.	Click the **OK** button. OK
23.	*NOTE: Do not check/uncheck the Count box or the Sufficient Stock Box. If it is checked, leave it checked. If it is unchecked, leave it unchecked. Making changes to these boxes may prevent the your order being received.*
24.	The item displays first in the list. Enter your **Request Qty**. Numbers must be entered in whole numbers (e.g., 1, 2, 3, etc.). **Remove** all zeroes and decimal points from the field before entering a number. The **Quantity** **must** be based on the **UOM** listed to the right of the **Request Qty** field. Enter the desired information into the **Request Qty** field. Enter "**4**".
25.	*NOTE: Do not save your request until all items have been entered.* Click the **Find** link. Find
26.	In this example you will search by item **Description** for PS # 127903 COVER SHOE #69252 CS/300. Enter the desired information into the **Enter search string:** field. Enter "**SHOE**".
27.	Click the **OK** button. OK

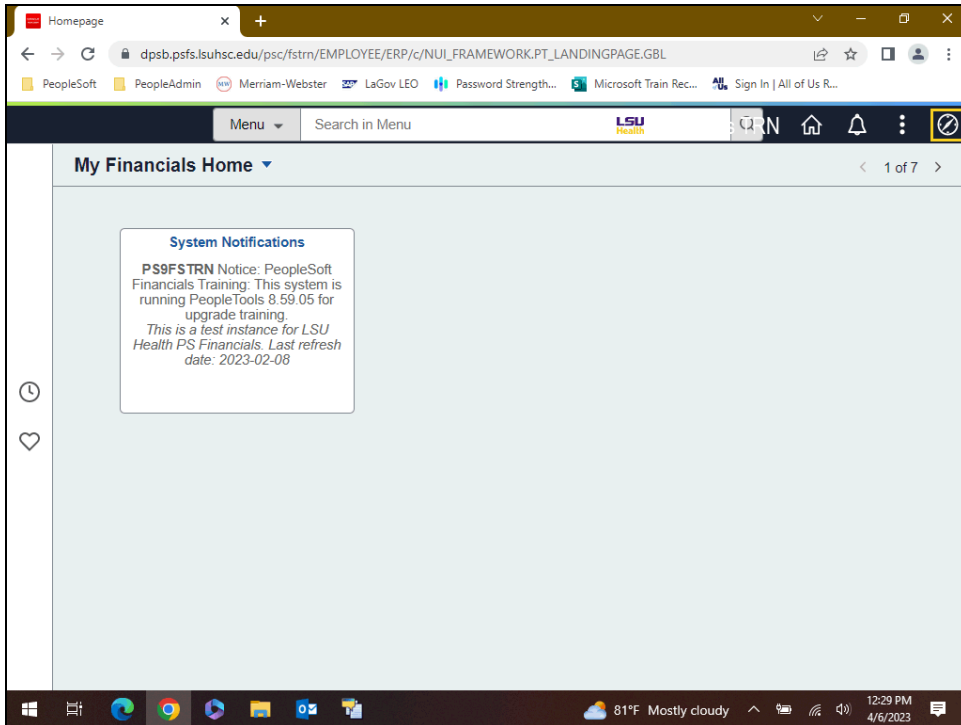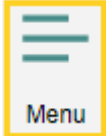| Step	Action
28.	The item displays at the top of the list. *NOTE: Remove <u>all</u> zeroes from the field before entering the quantity to prevent input errors from occurring. Quantity must be entered based on the defaulted UOM and must be entered in whole numbers (e.g., 1, 2, 3, etc.) You do not need to enter the decimal or trailing zeroes.* Enter the desired information into the **Request Qty** field. Enter "**2**".
29.	Click the **Down** scrollbar.
30.	Once all items have been entered, you will then **Save** your request. If you do **not** **Save** the cart before proceeding to another cart or some other process, you will lose your information. *NOTE: Separate cart requests must be done for medical and office supplies.* Click the **Save** button.
31.	Click the **Up** scrollbar.
32.	The **Par Count ID** has changed from **NEXT** to the next available **Order No**. In this example, the **Par Count ID** is **27164**. The **Status** remains at **Unprocessed**.
33.	This complete *Enter Inventory Order using Pre-Defined Carts*. **End of Procedure.**

Enter Inventory Order using InterUnit Transfer

Topic Contents:

1. Navigation
2. Business Unit (BU)
   a. BU sending items
      1) Warehouse - LKWHS
      2) Central Supply - LKCMS
3. Request Type
   a. InterUnit Transfer
   b. Only items charged to patient accounts
4. Destination
   a. BU receiving items
      1) Warehouse - LKWHS
      2) Central Supply - LKCMS
      3) Surgery - LKORU
         a) Can only receive - cannot fill stock requests
   b. Cust, Location and Chartfields default
5. Enter items
   a. Directly into field
   b. Use Look up Items
      1) May use any of listed criteria, plus catalog number
   c. Add rows for items
   d. When to Save
6. Print Request
   a. Print icon
   b. Report Manager link
      1) Blue link in Description
      2) In Material Issue Document
   c. Ellipsis
   d. Close tab
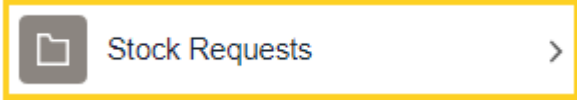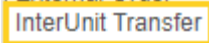
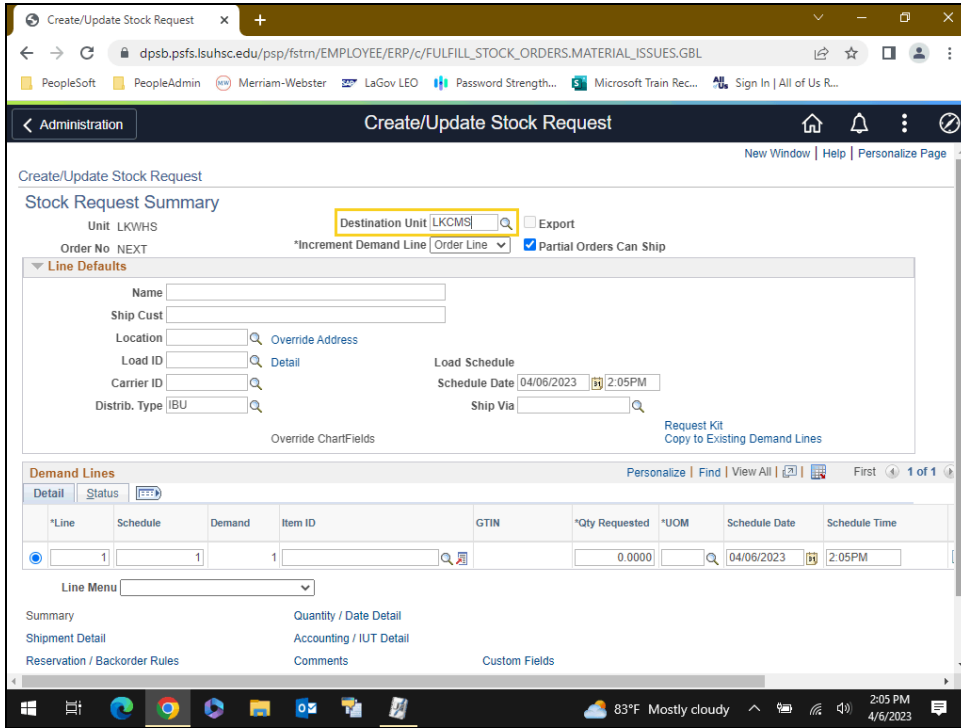| Step	Action
1.	Click the **NavBar** button.
2.	Click the **Menu** button.
3.	Press the left mouse button over the scrollbar and drag the mouse to the desired location.
4.	Click the **Inventory** button.
5.	Click the **Fulfill Stock Orders** button.
6.	Press the left mouse button over the scrollbar and drag the mouse to the desired location.

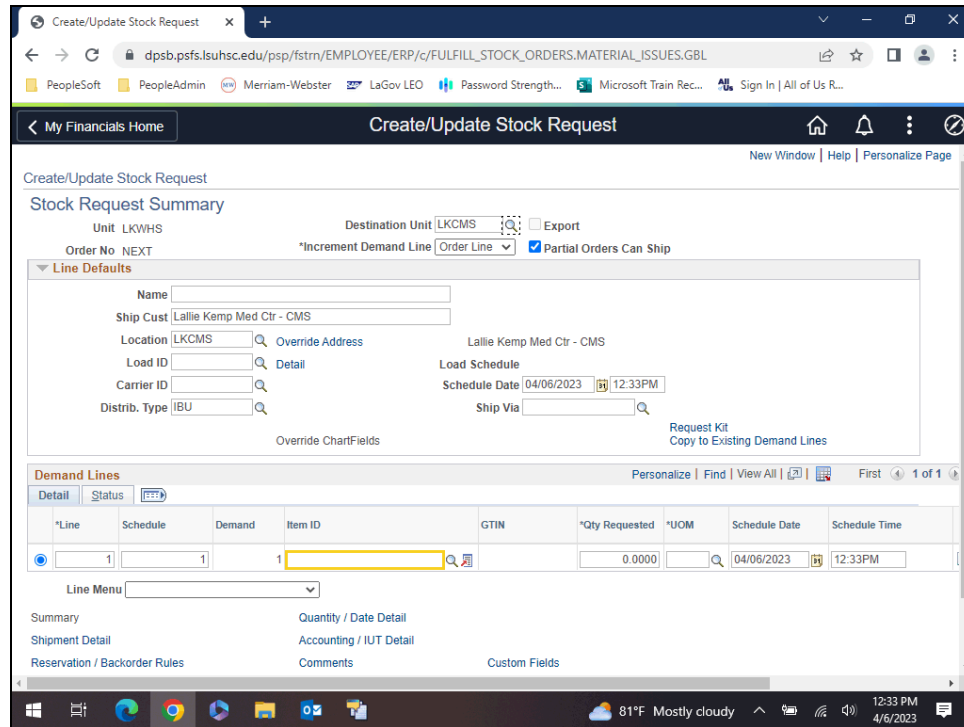| Step	Action
7.	Click the **Stock Requests** button.
8.	Click the **Create/Update Stock Requests** button.
9.	*NOTE: Only Warehouse (LKWHS) and Central Supply (LKCMS) designations may be used for Business Unit when creating a Stock Request.* In this example, you will enter the Business Unit (BU) directly into the BU field. You may search for the BU by click the magnifying glass (**Look up Business Unit)** to the right of the BU field. Enter the desired information into the **Business Unit** field. Enter "**LKWHS**".
10.	Click the button to the right of the **Request Type:** field.
11.	Click the **InterUnit Transfer** list item.
12.	Click the **Add** button.
13.	*NOTE: The Destination Unit is the Business Unit (BU) that will receive the transfer of supplies.* In this example, the Warehouse (LKWHS) is the BU transferring the supplies. Central Supply (LKCMS) will be the BU accepting the supplies. The same procedure is used if Surgery (LKORU) is submitting an InterUnit Transfer <u>from</u> LKWHS or LKCMS. Enter the desired information into the **Destination Unit** field. Enter "**LKCMS**".

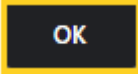| Step	Action
14.	Press the **Tab** button to exit out of the **Destination Unit**. The system will then automatically default the appropriate BU **Ship Cust**, **Location** and **Chartfields** information. Press **[Tab]**.
15.	You may search for items using one of two methods: 1. Enter the PS # directly into the Item ID field; or 2. Search for an item using the Look up Item ID button. Both will be demonstrated in this exercise.
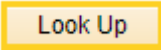
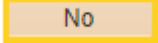| Step	Action
16.	*NOTE: Only items that will be <u>charged</u> to patient accounts may be ordered through InterUnit Transfer.* Enter the desired information into the field. Enter "**114980**". *NOTE: Tab out of the field after entering the Item ID so that the UOM will default. The UOM <u>cannot</u> be changed.*
17.	*NOTE: Remove <u>all</u> zeroes from the field before entering the quantity to prevent input errors from occurring. Quantity must be entered based on the defaulted UOM and must be entered in whole numbers (e.g., 1, 2, 3, etc.) You do not need to enter the decimal or trailing zeroes.* Enter the desired information into the ***Qty Requested** field. Enter "**2**".
18.	*NOTE: Do <u>not</u> Save the request until all items have been entered. Any items entered after saving may not be received by the Warehouse or Central Supply. This is dependent on the timing of the print.* If you have more items you wish to order, you can add lines by clicking the plus (+) sign at the far right of Line 1. Click the **Add multiple new rows at row 1** button. ➕

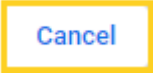| Step	Action
19.	A pop-up box displays asking how many lines you wish to add. It defaults to one (1). You may add as many lines as you need. However, any lines you do **not** use must be deleted in order to save your request. Click the **OK** button. OK
20.	Click the **Line 2 Look up Item ID** button. 🔍
21.	You may search using any of the listed criteria: **Item ID**, **Description**, **Item Group**, or **Family**. When searching for medical products using **Description**, you may also use the *catalog number* associated with the item. *Catalog numbers* are usually found within the item description. You may need to use a **wildcard (%)** in front of the catalog number to obtain the desired results.
22.	Click the button to the right of the **Description: begins with** field. ⌄
23.	Click the **contains** list item. contains
24.	Enter the desired information into the **Description:** field. Enter "**GAUZE**".
25.	Click the **Look Up** button. Look Up
26.	Click the **114897 GAUZE ELASTIC KLING 4" 2236** link. 114897 GAUZE ELASTIC KLING 4" 2236 545720 BANDAGE
27.	The PS # and the UOM default into the their respective fields. *NOTE: Remove **all** zeroes from the field before entering the quantity to prevent input errors from occurring. Quantity must be entered based on the defaulted UOM and must be entered in whole numbers (e.g., 1, 2, 3, etc.) You do not need to enter the decimal or trailing zeroes.* Enter the desired information into the ***Qty Requested** field. Enter "**2**".
28.	*NOTE: Do **not** Save the request until all items have been entered. Any items entered after saving may not be received by the Warehouse or Central Supply. This is dependent on the timing of the print.* Click the **Save** button. 💾 Save

Step	Action
29.	Once saved, the **Order No.** will change from *NEXT* to a number beginning with **SR** followed by eight (8) digits. Click the **Right** scrollbar. ▶
30.	At the top right of the page, you will see the **Print** icon. *NOTE: According to the size of your screen, you may need to scroll to view the icon.* Click the **Print** button. 🖨
31.	A dotted line will display around the **Print** icon. This indicates that the print process has begun. Go to the **Report Manager** link directly below the **Qty Requested** field to continue the print process.
32.	Click the **Down** scrollbar. ▼
33.	Click in the **Report Manager** field. Report Manager
34.	Click the **Yes** button. No
35.	The Report Manager page displays. In the Description field, you will see a *blue* link called **INX6501 - INV6501.html**. This is the **'In Material Issue Document'**. If the link is **not** blue, intermittently click the Refresh button until the Status = Posted and the blue link displays. Click the **INX6501 - INX6501.htm** link. INX6501 - INX6501.htm
36.	The **Material Stock Request** displays. You can print a hardcopy of the request using the **Customize** icon. Click the **Ellipsis (3 stacked dots)** button. ⋮
37.	Click the **Print… Ctrl+P** list item. Print... Ctrl+P

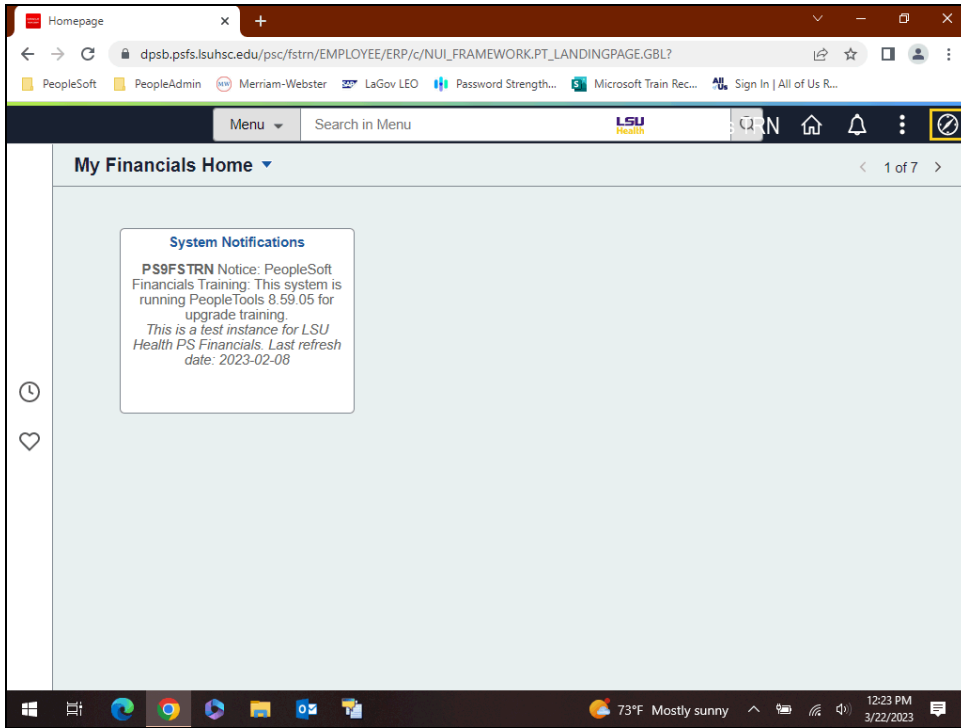| Step	Action
38.	Normally, you would select your parameters and then click the **Print** button. For **training purposes only**, click the **Cancel** button. Cancel
39.	Click the **Close** tab. ✕
40.	This completes *Enter Inventory Order using InterUnit Transfer*. **End of Procedure.**

Enter a Material Stock Request
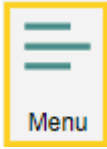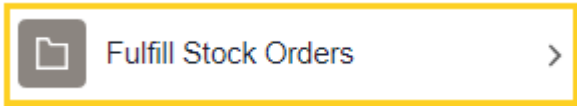
Topic Contents:

1. Navigate to Create/Update Stock Request page
2. Business Unit
    a. Central Supply - LKCMS
    b. Warehouse - LKWHS
3. Add page defaults
4. Add field information
    a. Location
    b. Name
    c. Dept
      1) Ship Cust
    d. Item information
    e. UOM
    f. Save Stock Request
      1) Order No. changes from NEXT
5. Print Stock Request
6. Access Report Manager

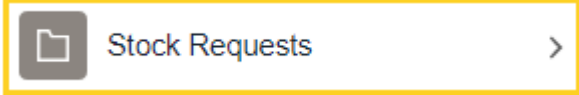| Step	Action
1.	*NOTE: The steps outlined in this topic are for creating a Material Stock Request only. Material Stock Requests are for ordering only items that cannot be requested through Pre-Defined carts or InterUnit Transfer. Please see the Enter Inventory Order using Pre-Defined Carts and the Enter Inventory Orders using InterUnit Transfer for request instructions for those topics.*

Step	Action
2.	Navigation to the Stock Request will be accomplished using the NavBar Menu. Click the **NavBar** button.
3.	Click the **Menu** button.
4.	Press the left mouse button over the scrollbar and drag the mouse to the desired location.
5.	Click the **Inventory** menu.
6.	Click the **Fulfill Stock Orders** menu.

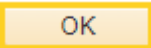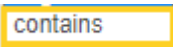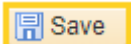| Step	Action
7.	Press the left mouse button over the scrollbar and drag the mouse to the desired location.
8.	Click the **Stock Requests** menu.
9.	Click the **Create/Update Stock Request** button.
10.	*NOTE: Only Warehouse (LKWHS) and Central Supply (LKCMS) designations may be used for Business Unit when creating a Stock Request.* Click the **Look up Business Unit** button.
11.	*NOTE: Only Warehouse or Central Supply (e.g., LKWHS or LKCMS) designations can be used for Business Unit when creating a Stock Request.* Click the **LKWHS - Lallie Kemp - Warehouse** link. LKWHS Lallie Kemp - Warehouse
12.	*NOTE: The Order No. defaults to next and <u>must</u> remain as defaulted. Changing this field to anything other than NEXT will cause errors.* The **Request Type** field defaults as **Internal Issue** and will remain as defaulted if creating a **Material Stock Request**. Clicking the drop-down menu will allow you to change the **Request Type** if the user wishes to enter an **InterUnit Transfer**. In this example, the **Request Type** will remain as **Internal Issue**. Click the **Add** button.
13.	The **Location** is a required field. It is the department requesting the item(s) and where the item(s) will be charged. You can search for your seven-digit department id using the **Look up Department ID** or enter it directly into the field. Enter the desired information into the **Location** field. Enter "**2058980**".
14.	The **Name** field is also a required field and is not case sensitive. You may enter the **Requester's Name** or **User ID** into the **Name** field. This identifies the person requesting the item(s), so if an issue arises the warehouse knows who to contact. Enter the desired information into the **Name** field. Enter "**Karen ext. 1234**".

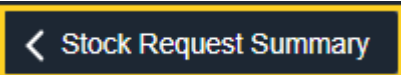| Step	Action
15.	Click the **Override ChartFields** link. Override ChartFields
16.	You will enter the seven-digit department number into the **Dept** field. This is the same number you entered for **Location**. *NOTE: The Dept must be entered <u>prior</u> to entering Item Information. Failure to do so will require the user to enter the department information on every line of the Stock Request, or start the Stock Request over.*
17.	*NOTE: Dept is the only information you will enter on the ChartField Override panel.* Enter the desired information into the field. Enter "**2058980**".
18.	Click the **OK** button. OK
19.	The **Ship Cust** information defaults once the **Dept** is entered on the **ChartField Override** panel.
20.	Item information will be entered. You can search for items using the **Look up Item ID** button. *NOTE: If you know the PS #, you may enter it directly into the Item ID field.* Click the **Look up Item ID** button.
21.	You can search using any of the listed criteria: *Item ID, Description, Item Group, or Family*. When searching for medical products using description, you may also use the *catalog number* associated with the item. *Catalog numbers* are usually found at the end of the item description. You may need to place a **wildcard (%)** in front of the *catalog number* to obtain the desired result (e.g., %1088)
22.	Click the button to the right of the **Description beings with** field.
23.	Click the **contains** list item. contains
24.	In this example, you will search for **WIPES (GREY) SANICLOTH AF3 P13**. Enter the desired information into the **Description:** field. Enter "**WIPES**".
25.	Click the **Look Up** button. Look Up

Step	Action
26.	Click either the **Item ID** or the **Description** link to select an item. Click the **190653 - WIPES (GREY) SANICLOTH AF3 P13** link. 190653 WIPES (GREY) SANICLOTH AF3 P13
27.	*NOTE: The Item ID defaults into the Item ID field. The UOM also defaults onto the page once the item is selected. The UOM <u>cannot</u> be changed.*
28.	*NOTE: Remove <u>all</u> zeroes from the field before entering the quantity to prevent input errors from occurring. Quantity must be entered based on the defaulted UOM and must be entered in whole numbers (e.g., 1, 2, 3, etc.) You do not need to enter the decimal or trailing zeroes.* Enter the desired information into the ***Qty Requested** field. Enter "**1**".
29.	*NOTE: <u>Do</u> <u>not</u> <u>save</u> the Stock Request until <u>all</u> items have been <u>added</u>. The Stock Request will automatically be routed to the Warehouse or Central Supply once it is saved. Any items added after the Stock Request is saved will <u>not</u> be transmitted.*
30.	The Sanicloth Wipes will be the only item entered. *NOTE: <u>All</u> items <u>must</u> be entered <u>before</u> saving the Stock Request. Any items entered after saving will <u>not</u> be received by the Warehouse or Central Supply.* Click the **Save** button. 🖫 Save
31.	Once saved, the **Order No.** changes from *NEXT* to the next available **Order No.** All order numbers begin with **SR** (i.e., Stock Request) followed by an eight-digit number. Click the **Up** scrollbar. ▼
32.	Click the **Right** scrollbar. ▶
33.	Click the **Print** button. 🖨
34.	A dotted line displays around the **Print** icon indicating the print process has begun. *NOTE: A Warning message <u>may</u> display stating there is unsaved data on the page. You may either select Yes to re-save the document, or No to continue.* Click the **Down** scrollbar. ▼

Step	Action
35.	Click the **Report Manager** link. Report Manager
36.	On the **Report Manager** page, the top line is your most recent print request. You will see a blue link in the *Description* field called **INX6501 - INX6501.htm**. This is the **'In Material Issue Document'**. If the link is not blue, click the **Refresh** button until the *Status = Posted* and the blue link displays. Click in the **INX6501 - INX6501.htm** field. INX6501 - INX6501.htm
37.	The **Material Stock Request** displays. Select **Ellipsis** (three dots) to print a hard copy of the request. Click the **Close tab** button. ×
38.	Click the **Stock Request Summary** button. < Stock Request Summary
39.	This completes *Enter a Material Stock Request*. **End of Procedure.**