

STANTON TERRITORIAL HEALTH AUTHORITY

Yellowknife, Northwest Territories

TITLE: Adding and Removing Items from ORMED	Revision Date: 14-July-2016	Issue Date: 14-July-2014
Document Number: QUA50230	Status: Approved	
Distribution: Laboratory Quality Manual	Page: 1 of 7	
Approved by: C. Case, Manager of Diagnostic Services	Signed by: <i>Cheryl Case</i>	

PURPOSE:

This procedure will allow the user to add new items to the ORMED system to provide consistency in ordering and allow the user to efficiently communicate the correct item information to the Materials Management Department.

POLICY:

- QUA50100 Purchasing and Inventory Policy

PROCEDURE INSTRUCTIONS:




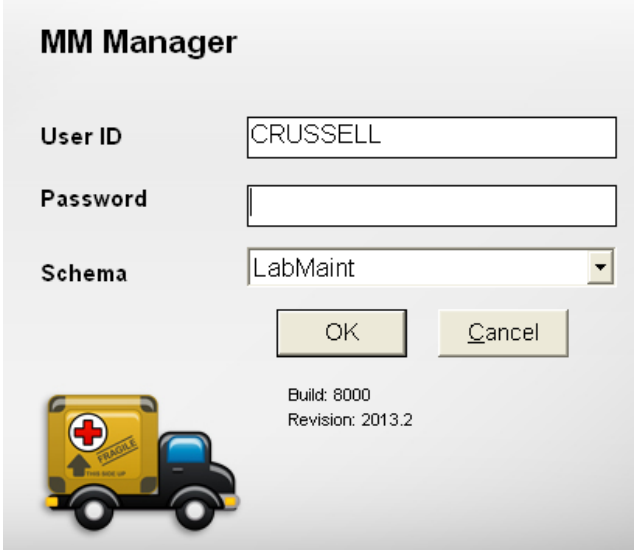




Step	Action	
Adding Items to ORMED		
1	Once the appropriate item has been established (see QUA50200 Selection Based on the Ability to Meet Requirements), gather all of the item details and enter them in the ORMED system. NOTE: Only the Manager of Diagnostic Services, the Laboratory Supervisor and the Tech IIs have been granted access to the ORMED ordering system.	
2	If:	Then:
	The vendor already exists in ORMED	Proceed to Step 3.
	The vendor does NOT exist in ORMED	Set up the vendor as described in QUA50220 Adding and Removing Vendors from ORMED . Proceed to Step 7.

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FILENAME: QUA50230AddingandRemovingItemsfromORMEDPRO.doc

PRINT DATE: 14 July 2014

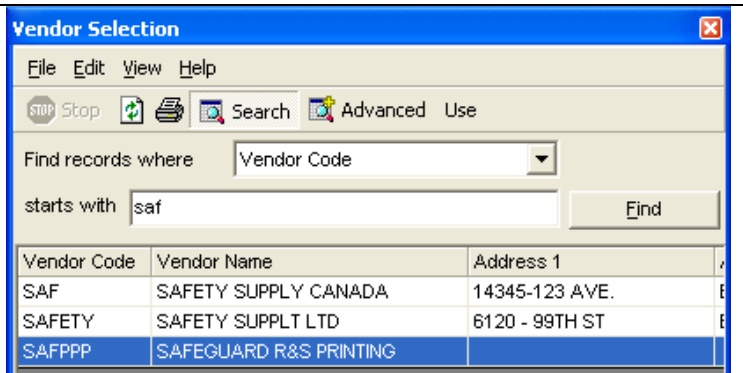
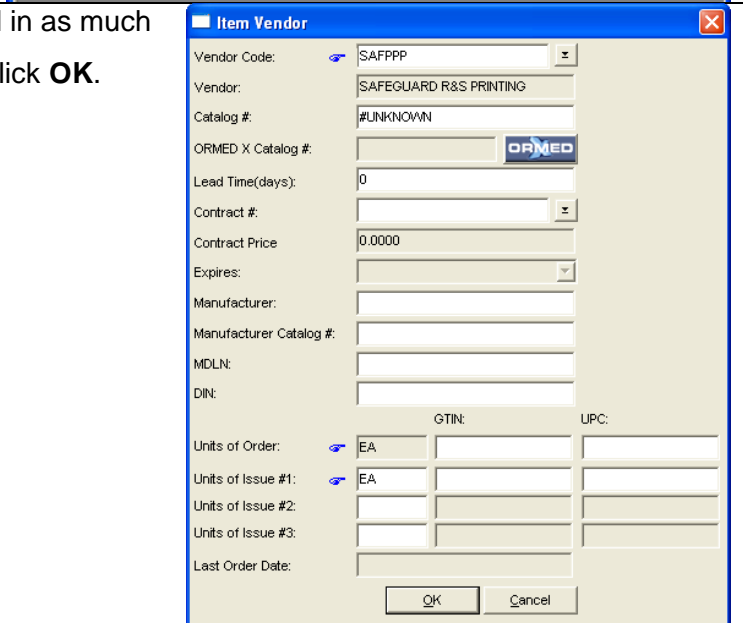
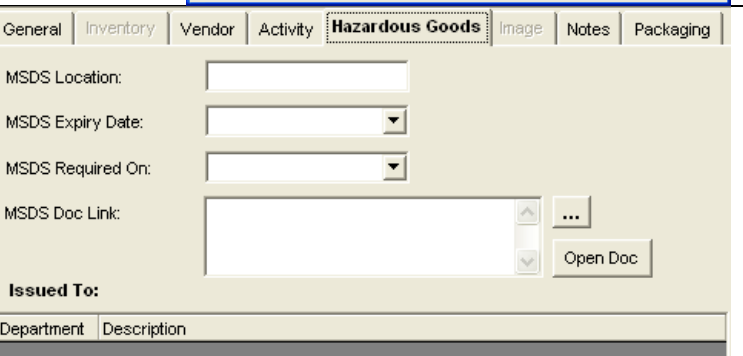

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3	From the desktop, click on the Supply Chain icon.	
4	Click on the Materials Management icon.	
5	Click on the MM Manager icon.	
6	<p>Fill in the User ID and Password fields. Ensure the Schema is LabMaint.</p> <p>Click OK.</p>	 <p>MM Manager</p> <p>User ID: CRUSSELL</p> <p>Password: []</p> <p>Schema: LabMaint</p> <p>OK Cancel</p> <p>Build: 8000 Revision: 2013.2</p> 
7	Click on the Item Catalog icon.	
8	Click on the Create New icon.	
9	<p>In the General tab, fill in as much information as is available. The fields with the pointing finger next to them are required. The most difficult field to fill out is the Item # field. If you inadvertently select a number that has already been used, it will let you know when you try to save.</p>	 <p>Item #: 004142 ORMED X Catalog #: []</p> <p>Desc 1: Dura Therm 3 Barcode Labels</p> <p>Desc 2: 2.5x1.25</p> <p>Common Name: LIS Trial Labels</p>



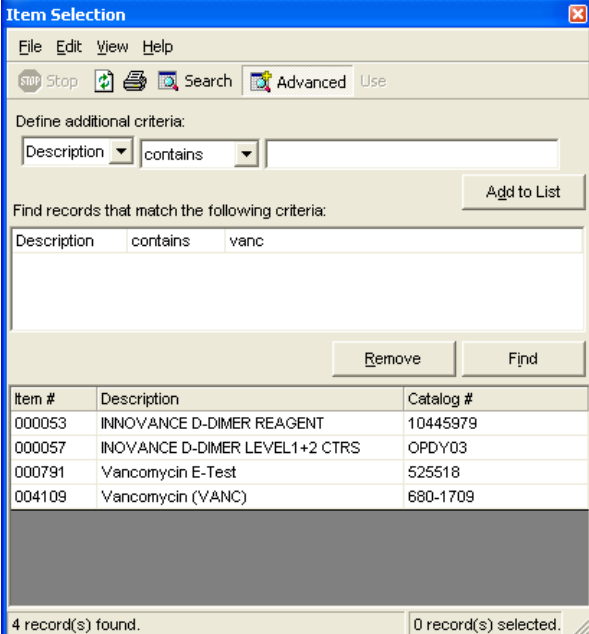
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10	<p>The Commodity and Category fields are for the Finance Codes. If you are unsure of which codes to select, consult QUA50240 Diagnostic Services Finance Codes and QUA50250 Secondary Code Descriptions.</p> <div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"> Commodity: <input type="text" value="1.11570"/> </div> <div style="margin-right: 10px;"> <input type="text" value="LAB INVENTORY"/> </div> </div> <div style="display: flex; align-items: center; margin-top: 5px;"> <div style="margin-right: 10px;"> Category: <input type="text" value="41020"/> </div> <div> <input type="text" value="PAPER STOCKS"/> </div> </div> <p style="color: red; text-align: center; margin-top: 20px;">NOTE: Finance has not yet updated the codes in the ORMED system. If you cannot find the correct codes in ORMED, pick the best one available and add the correct code to the Notes tab for this item. Report this to the Manager of Diagnostic Services for follow up with the Finance Department.</p> 
11	<p>In the Status box on the General tab, check the applicable boxes for the item.</p> <p>NOTE: If the Stock box is not checked (non-stock item), you will not have access to the Inventory tab and can skip to Step 14.</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> Status <input type="checkbox"/> Stock <input checked="" type="checkbox"/> Active <input type="checkbox"/> Haz. Goods <input checked="" type="checkbox"/> Critical <input type="checkbox"/> Expiry Date <input type="checkbox"/> Reusable <input type="checkbox"/> Latex-Free <input type="checkbox"/> HST <input type="checkbox"/> JIT </div>
12	<p>In the Inventory tab, select the Inventory and Account fields as shown. These are the only choices available that are applicable to the Laboratory.</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px; width: fit-content;"> <div style="background-color: #4a86e8; color: white; padding: 2px 5px; display: inline-block;">Inventory</div> <div style="margin-left: 10px;"> Inventory: <input type="text" value="LAB/MTCE"/> <input type="text" value="GENERAL INVENTORY"/> </div> <div style="margin-left: 10px; margin-top: 5px;"> Account: <input type="text" value="1.11570.INVENT"/> <input type="text" value="GENERAL INVENTORY"/> </div> </div>
13	<p>The ROP field is for our minimum volume of stock on hand.</p> <p>The MAX field is for our maximum level of inventory.</p> <p>The Location fields are to indicate where the items are stored in the laboratory.</p> <div style="margin-top: 10px;"> ROP: <input type="text" value="0"/> MAX: <input type="text" value="0"/> EOQ: <input type="text" value="0"/> Location #1: <input type="text"/> Location #2: <input type="text"/> </div>
14	<p>In the Vendor tab, click on the Add button.</p> <div style="text-align: right; margin-top: 10px;"> <input type="button" value="Add"/> </div>

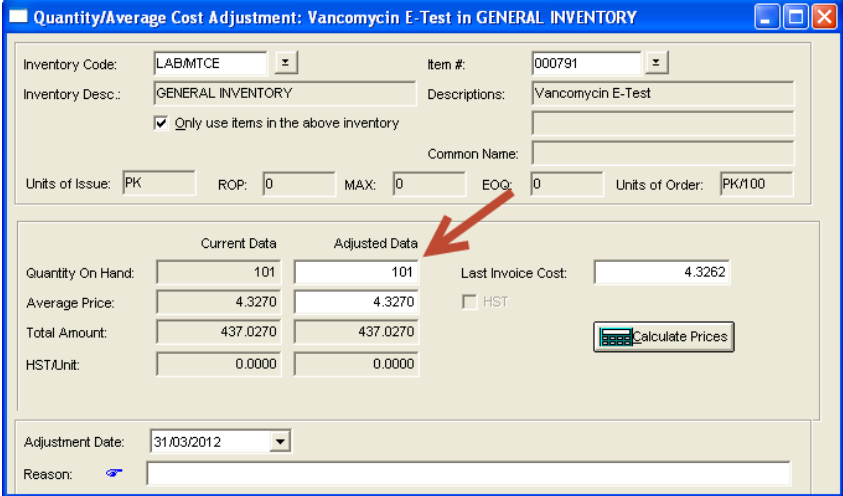



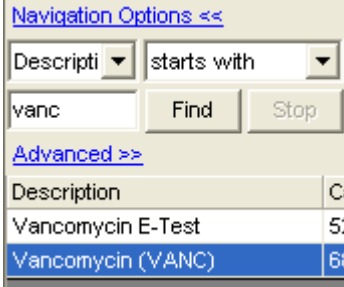
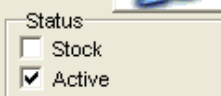

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15	Use the Search feature to find the correct vendor for the item. Highlight that item, then press Enter .	
16	In the Item Vendor window, fill in as much information as possible, then click OK .	
17	In the Hazardous Goods tab, enter any applicable MSDS information.	
18	Once all of the information has been added, click Save .	

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Step	Action																
Removing Items from ORMED																	
1	Once it has been determined that an item is no longer required in the ORMED system because we no longer require the item, we have an agreement with another vendor, or it is no longer used as the result of poor quality or service (see QUA50400 Supplier, Contractor and Consultant Evaluation) they may be inactivated in the system.																
2	To inactivate an item, it has to have a zero quantity.																
	If:	Then:															
	The item has a zero quantity	Proceed to Step 8.															
	Does NOT have a zero quantity	Proceed to Step 3.															
3	Log in to the Inventory Control module.  Inventory Control Shortcut 1 KB																
4	Click on the Qty. Cost Adjustment icon. 	Qty. Cost Adjustment															
5	Use the Search or Advanced feature to find the item you wish to inactivate. Highlight it in the list then press Enter .	 <p>Item Selection</p> <p>File Edit View Help</p> <p>Stop Search Advanced Use</p> <p>Define additional criteria:</p> <p>Description contains</p> <p>Add to List</p> <p>Find records that match the following criteria:</p> <p>Description contains vanc</p> <p>Remove Find</p> <table border="1"> <thead> <tr> <th>Item #</th> <th>Description</th> <th>Catalog #</th> </tr> </thead> <tbody> <tr> <td>000053</td> <td>INNOVANCE D-DIMER REAGENT</td> <td>10445979</td> </tr> <tr> <td>000057</td> <td>INOVANCE D-DIMER LEVEL1+2 CTRS</td> <td>OPDY03</td> </tr> <tr> <td>000791</td> <td>Vancomycin E-Test</td> <td>525518</td> </tr> <tr> <td>004109</td> <td>Vancomycin (VANC)</td> <td>680-1709</td> </tr> </tbody> </table> <p>4 record(s) found. 0 record(s) selected.</p>	Item #	Description	Catalog #	000053	INNOVANCE D-DIMER REAGENT	10445979	000057	INOVANCE D-DIMER LEVEL1+2 CTRS	OPDY03	000791	Vancomycin E-Test	525518	004109	Vancomycin (VANC)	680-1709
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6	In the Quantity on Hand row, enter 0 in the Adjusted Data column. In the Reason field, type in the reason for the adjustment.	
7	Once all of the information has been added, click Save .	
8	Log into the MM Manager module.	
9	Click on the Item Catalog icon.	
10	Use the Navigation Options to find the item.	
11	When your item is displayed, uncheck the Active and Stock boxes in the Status field.	
12	Click Save .	

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RELATED DOCUMENTS:

- QUA50100 Purchasing and Inventory Policy
- QUA50200 Selection Based on the Ability to Meet Requirements
- QUA50220 Adding and Removing Vendors from ORMED.
- QUA50240 Diagnostic Services Finance Codes
- QUA50250 Secondary Code Descriptions

REFERENCES:

- Devitt, C. (2014, February 27). MM Inventory Adjustments (Attachment). *2014 Inventory Procedures and Preparation (Subject Line)* . Yellowknife, Northwest Territories, Canada.

REVISION HISTORY:

REVISION	DATE	Description of Change	REQUESTED BY
1.0	14Jul14	Initial Release	C. Russell