Stock Issue

HHT Guide

Version 2.6.7

This document is intended for use By End users and Functional Managers

501 Kings Hwy, Fairfield, CT 068525 Phone: (888) 647-4721 Fax: (866) 714-2857

Change Record

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AtPar Login Screen

The @Par Hand Held Terminal (HHT) device login screen can be accessed when users are set up by their @Par Administrator or Supervisor. @Par Version information is displayed on the login screen. The Remember Me checkbox will retain the user id information of the user who last used the HHT. This will require only the entry of the password for that user.

The keyboard should appear automatically upon access to this screen. This allows users' easy access to type in their information. If the keyboard doesn't appear tap the icon in the bottom center of the login screen.

Enter your **Login Name** and **Password** and ***TAP*** the Login button **Figure 1**.

Figure 1

AtPar Apps Screen

Based on the applications assigned to the client user by the administrator or supervisor the screen below appears for access to an @Par product or products **Figure 2**

Figure 2

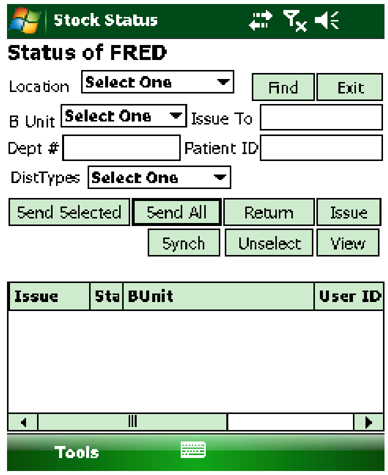


Figure 3

Upon successful login if the user only has access to the **@Par Stock Issue** they will move automatically to the **Stock Status** screen, shown in **Figure 3.** If the user has more than one **@Par** product the icons will appear in **Figure 2** for user to choose which application to use.

The **Stock Status** screen is the main screen and is used to issue and return items as well as send data to the ERP server upon completion of item pick.

To get started ***TAP*** the **Stock Issue** icon. This will launch the module and you will see the **Pick Status** screen **Figure 3**.

Stock Issue - Buttons and fields explanations

The Stock Issue product is used to issue Adhoc items (Express Issue) and from Storerooms and Warehouses. Stock Issue can also be used to process department returns. (Express Putaway)

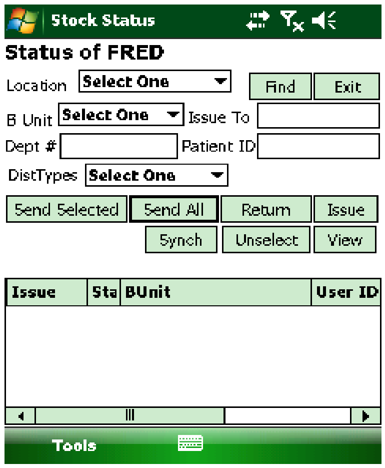


Figure 4

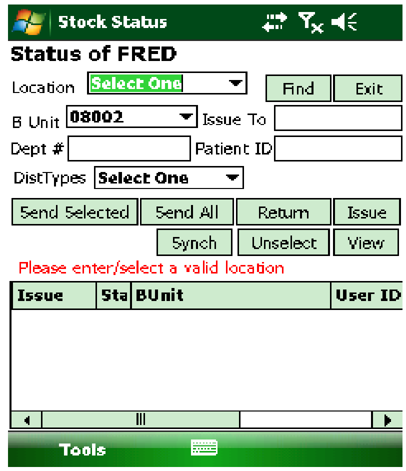
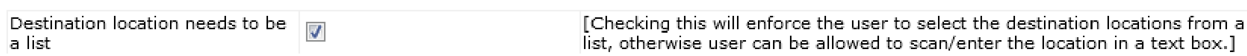


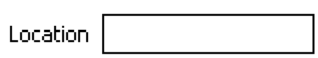
Figure 5

Location – Enter the Issue Requestor's location, or the location where the item is going to be used. **This is always a mandatory field.** If a user clicks the Issue button without completing this field the message in **Figure 5** appears

Depending on how the @Par Administrator or Supervisor has set up the following Org Group parameter, the location field type can be displayed in two different styles:



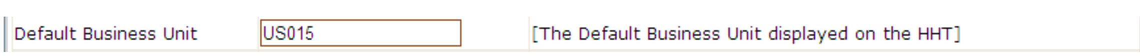
If this parameter is checked, the **Location** field will display as a drop down list as shown below on the left. If parameter is unchecked it will display as a Text field where the user can either enter a valid location manually, or scan from a bar code label (below right)



Find - This works the same in all **@Par** products. This button is used to "Find" an issue that has already been downloaded on the HHT device. This is useful if there are more issues created than can be displayed on the **Stock Status** screen.

Exit - This option will exit the **Stock Issue** application.

B Unit - This is always a mandatory field. If the Default Business has been entered on the **@Par** server, it will appear here automatically and each time the user logs into the HHT. The default business unit is a setting in User Parameters on the @Par Web page which can be set by the supervisor.



There is a related setting in profile parameters to allow a user to type in an alternate Business Unit on the HHT. If the parameter below is checked, the user can perform this function, and if it is unchecked the user will only be able to select create an issue for the Default Business Unit as the field will become disabled.

Edit Business Unit on Handheld	☑	[Selection of this parameter allows the user to edit the Business Unit on the handheld]

Examples of how the BU field would look on the HHT for the Edit parameter:

B Unit US015	B Unit US1	B Unit US015
Edit Checked	User editing	Edit Unchecked and BU disabled

Before a user can access any information on the HHT the Supervisor needs to allocate Inventory Business Units to the user. This is found on the @Par Web Page under the menu function link

Allocate Inventory Business Units

If a user clicks the Issue button before selecting a Business Unit the message in **Figure 6** appears

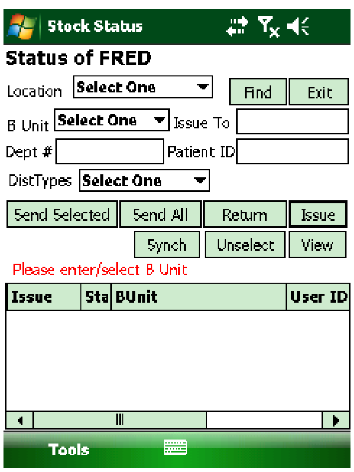


Figure 6

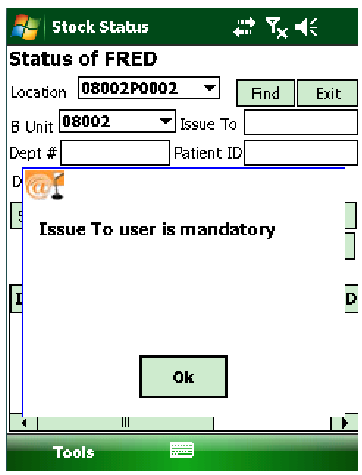


Figure 7

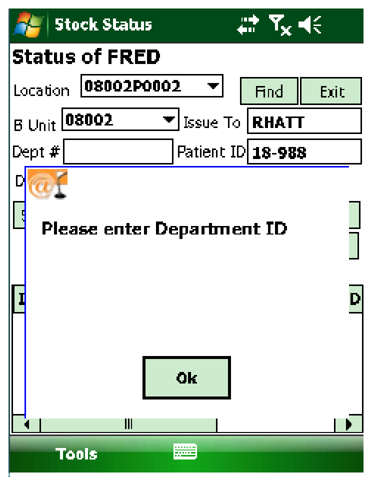


Figure 8

Issue to - Enter the name of the Requestor in this field. If the following profile parameter is checked and a user ***TAPS*** the **Issue** button without enter a value in this field a message displays **Figure 7.**

Issue To user required	☑	[Checking this will force the user to enter user id of the person requesting items]

If the parameter is unchecked then the Issue To name/ID is not required.

Dept # - Enter the Requestor's department number in this field. This is an important field for cost allocations. (Determines which department will be charged for the cost of the item). If the profile parameter below is checked and a user omits the value the message in **Figure 8** appears upon ***TAPPING*** the Issue button

Department ID required	☑	[Checking this will force the user to enter Department ID at the time of issuing items]

If the parameter is unchecked then the Dept # is not required.

Patient ID - Enter the Patient ID that the item is being issued to. If this field is required and it is left blank when the Issue button is ***TAPPED*** **Figure 9** will be displayed.

The message will only appear if the following Profile Parameter is checked.

Patient ID required	☐	[Checking this will force the user to enter patient id at the time of issuing items]

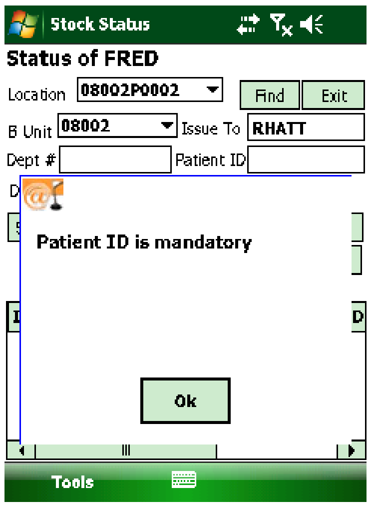


Figure 9

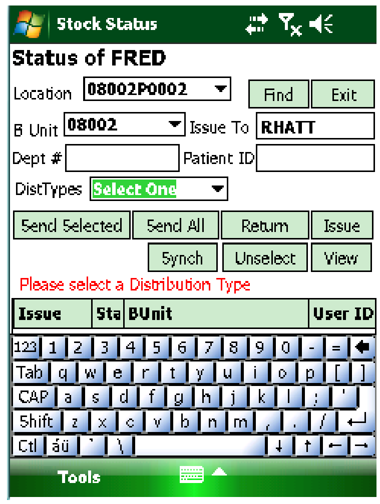


Figure 10

If the parameter is unchecked the Patient ID is not required.

Dist Type - Enter the Distribution Type that the item is for. If this field is required and it is left blank before ***TAPPING*** the Issue button, the message as shown in **Figure 10** will be displayed.

The message appears only when the following Org Group parameter is selected

Distribution Type Required	☑	[Checking this will force the user to select the distribution type from the list]

If the parameter is unchecked then the Distribution Type is not required.

NOTE: Distribution Type is only related to PeopleSoft customers

Send Selected - This option uploads (or moves) Issues to the production server. First the user needs to highlight the Issue to be uploaded, and then use this option.

NOTE: Only issues with a status of **Issued** will be sent to the ERP server

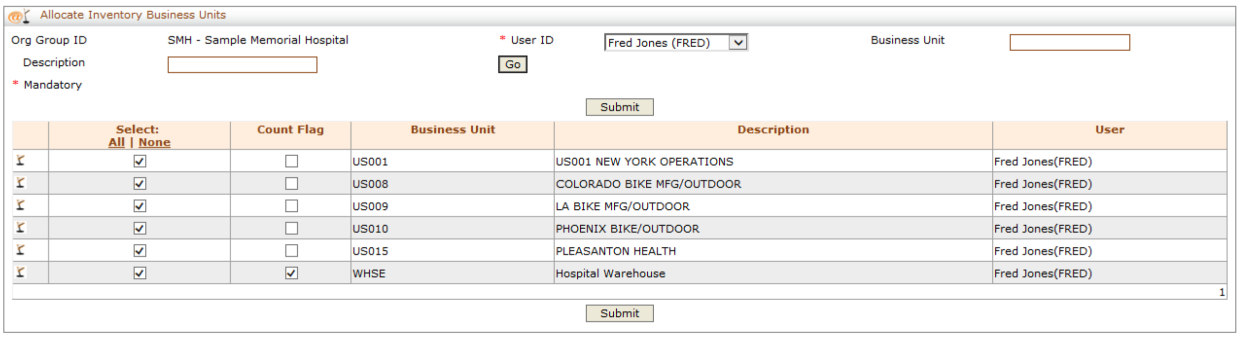
Send All - This option does nearly the same thing as "Send Selected" option. The difference is that this option will send all issues on the HHT terminal (HHT) that have a status of **Issued.** Users are **not** required to highlight each issue in order to send it using this option.

Return - This button opens the **Return Items** screen. If the following profile parameter is checked this button will be enabled.

Return Items	☑	[Checking this will allow the user to do item returns]

If the parameter is unchecked the Return button will not appear on the HHT screen.

NOTE: If IBU is a 'Count' Inventory Business Unit, the Return button will be greyed out regardless of whether this parameter is checked or not. The Count type is based on whether the supervisor as selected the Count Flag option for the user in the Allocate Inventory Business Units


Allocate Inventory Business Units

Org Group ID: SMH - Sample Memorial Hospital | * User ID: Fred Jones (FRED) | Business Unit:
Description: | Go
* Mandatory

Submit

Select: All | None	Count Flag	Business Unit	Description	User
☑	☐	US001	US001 NEW YORK OPERATIONS	Fred Jones(FRED)
☑	☐	US008	COLORADO BIKE MFG/OUTDOOR	Fred Jones(FRED)
☑	☐	US009	LA BIKE MFG/OUTDOOR	Fred Jones(FRED)
☑	☐	US010	PHOENIX BIKE/OUTDOOR	Fred Jones(FRED)
☑	☐	US015	PLEASANTON HEALTH	Fred Jones(FRED)
☑	☑	WHSE	Hospital Warehouse	Fred Jones(FRED)

1

Submit

The returns process is explained in detail later in this document.

Issue - After entering the required previous information, tap this button to enter item information.

If the user ***TAPS*** the Issue button without entering a Location you will receive the following message in **Figure 11**.

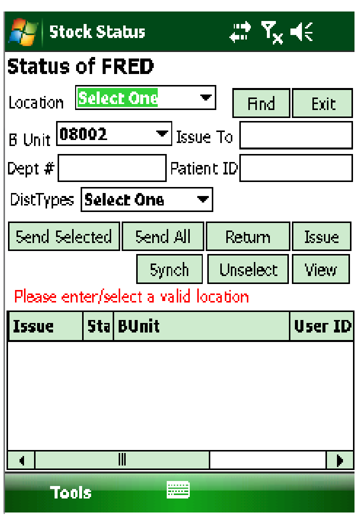


Figure 11

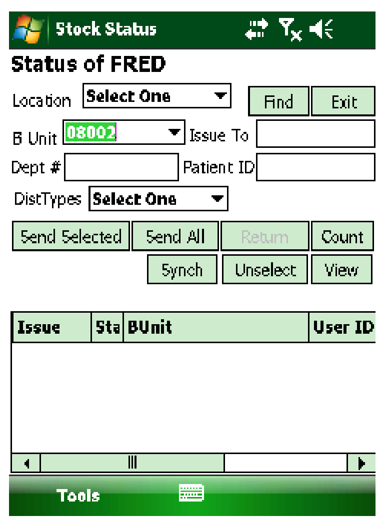


Figure 12

Count - If an Inventory Business Unit is flagged a 'Count' Business Unit in Allocate Inventory Business Units on the Server as noted below the Issue button will be replaced with the Count button and the Return button will be disabled . **Figure 12**

BinToBin- If an organization has purchased the @Par BIN 2 BIN module users can access the application from the Stock Issue HHT – **Stock Status** screen.

If the following profile parameter is checked, users will have access to the product.

Allow the user to do Bin To Bin transfer	☑	[Checking this will allow the user to navigate to Bin To Bin Application from Stock Issue]

The Bin to Bin functionality is covered in the Bin to Bin product help documents.

Synch- This option synchs (or downloads) all items for the displayed Business Unit to the HHT device. Using this method will take longer to download but is efficient if there are multiple items within the same business unit being issued or added to an issue. If you do not synch items when issuing the processing time per item may be slowed.

Synching will be explained in detail with more information regarding parameters later in this document.

Unselect- If an issue has been highlighted, the only way to remove the highlight from the LV or grid is to ***click*** on his button.

View- To edit an existing Issued event, click this button. This will be covered in more detail later in this document.

How to issue an item

Depending on the following two Org Group parameters users may need to synchronize items from a Business Unit or Business Units before issuing an item. If the parameters are unchecked, users can still issue an item but the download process time to do so may be affected significantly.

@Par recommends always synching your HHT with the Business Unit for which the issue is being created.

The following Org Group parameters should be checked by the @Par Administrator:

Inventory information sync required	☑	[Checking this will force the user to sync the inventory information to issue items]
Sync items of all allocated Business Units	☑	[Checking this will provide an option to sync items of all allocated inventory business units]

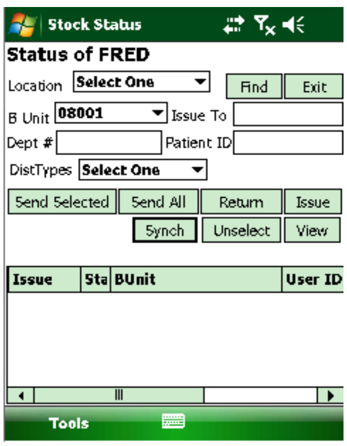


Figure 13

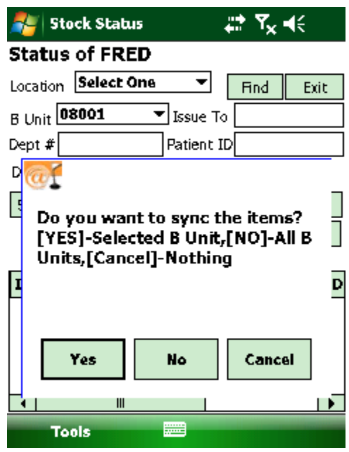


Figure 14

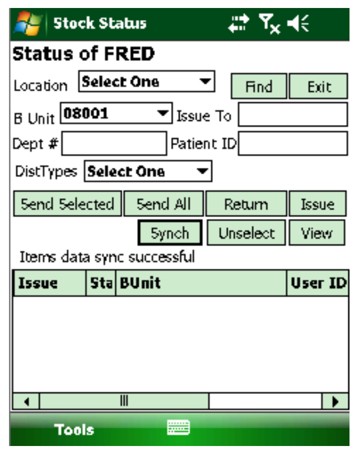


Figure 15

To start select a Business Unit and ***TAP*** the [Synch] button from the Stock Status screen. **Figure 13**

The message will appear in **Figure 14**

- ***Click*** on the [Yes] button in **Figure 14** to sync ONLY items from the Business Unit displayed on the HHT
- ***Click*** on the [No] button in **Figure 14** to sync items for ALL Business units that have been allocated to the user
- ***Click*** on the [Cancel] button in **Figure 14** to return user to the Stock Status screen without synching any items

TAP the [Yes] or [No] button and the message in **Figure 15** appears.

Once synchronization is complete the user will enter all required information on the **Stock Status** screen and begin issuing items by ***TAPPING*** the [Issue] button. **Figure 16**

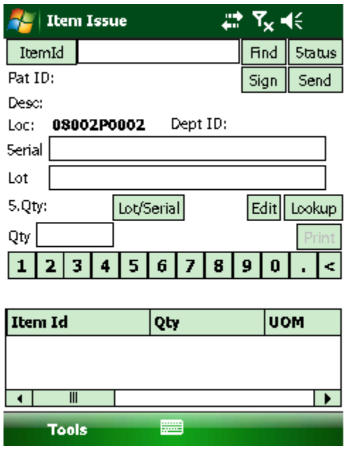


Figure 16

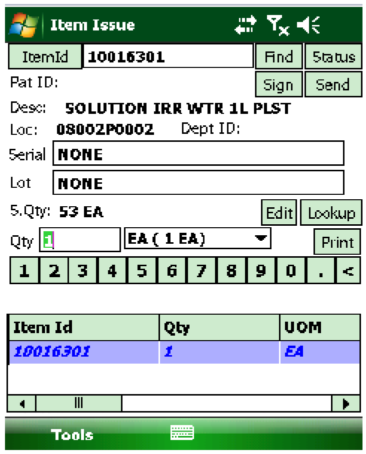


Figure 17

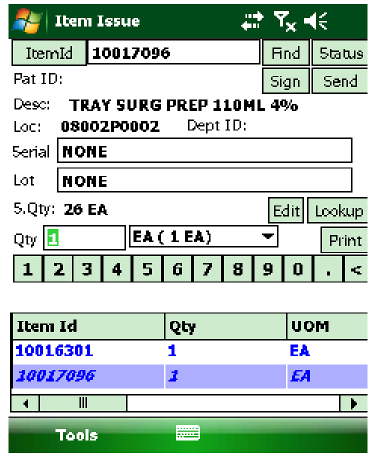


Figure 18

Users will utilize the **Item Issue** screen to issue items. At this point, the user can either type in the Item Id or scan the Item ID bar code label. If users enter an item manually they need to ***click*** the  button. **Figure 17**

If users can the Item ID and the following profile parameter is selected, the item is automatically add to the issue list upon scan of bar code label **Figure 18**

In either method the item description, location, department id, serial number, lot number, S. Qty (items in stock), item unit of measure (drop down list will display all unit of measures item has associated within the ERP system), and Qty will appear. The Qty field will default to 1 to eliminate the entry if user is only issuing one item. User can change the quantity if required.

If the following profile parameter is checked users must capture signature before moving forward.

Signature Confirmation	☑	[Checking this will force the user to take the signature confirmation from the user after issuing items]

User will capture signature by ***clicking*** on the  button. **Figure 19**

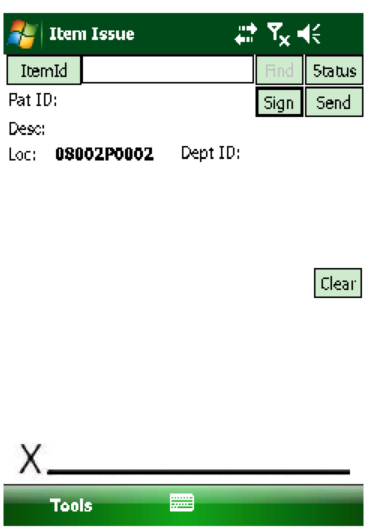


Figure 19

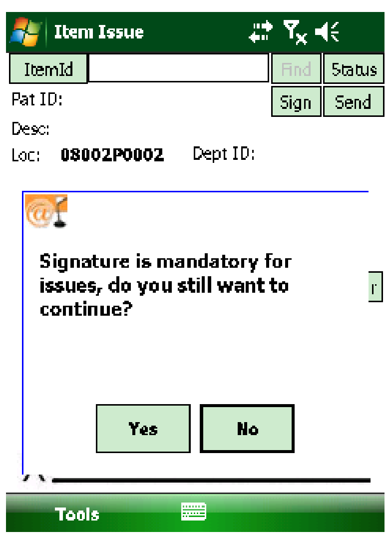


Figure 20

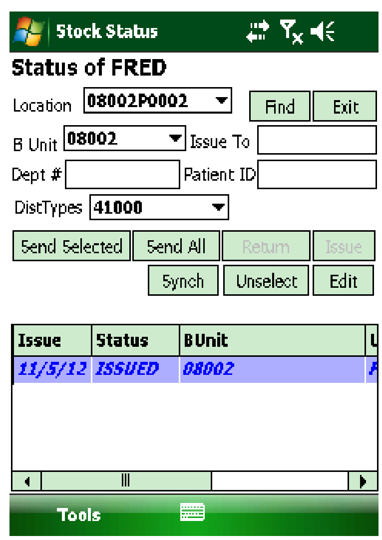


Figure 21

If the user attempts to send or return to the previous screen without capturing the signature the message in **Figure 20** will appear.

Click the No button to return to signature screen.

Click Yes to move to the **Stock Status** screen. **Figure 21**

NOTE: The View button has now changed to Edit.

The Edit button will allow the user to return to the Item Issue screen but only be able to change the Serial and Lot number and capture a signature. It will not allow editing the quantity. The purpose of this functionality is to prevent users from issuing more items than are signed for.

The quantity and unit of measure fields are disabled **Figure 22**

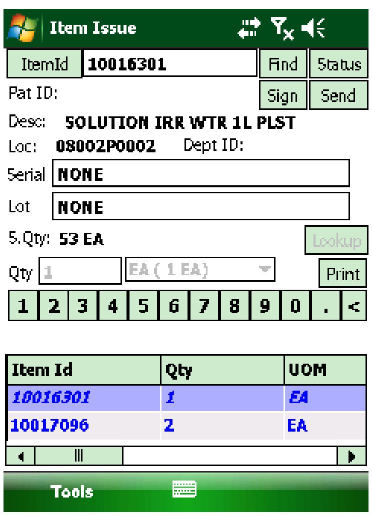


Figure 22

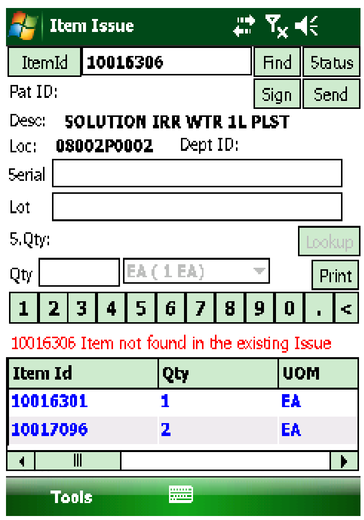


Figure 23

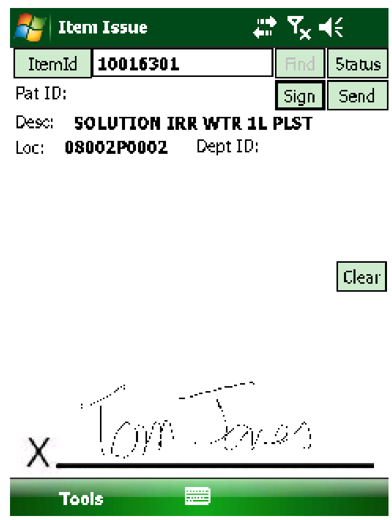


Figure 24

If the user attempts to add another item to this issue the message in **Figure 23** will appear

User may now capture the signature they forgot to get previously. After the signature is signed in **Figure 24** the user may require clearing the signature and obtaining another signature if the original signature capturing is the wrong individual. If this occurs, the user will ***click*** the Clear button. **Figure 25**

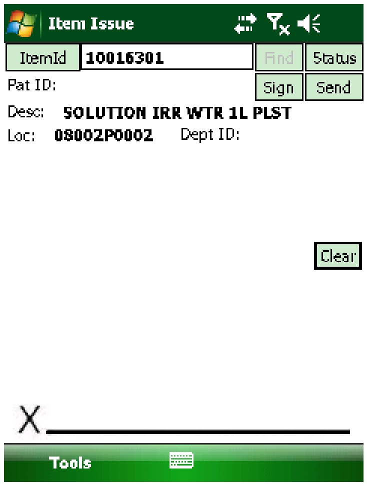


Figure 25

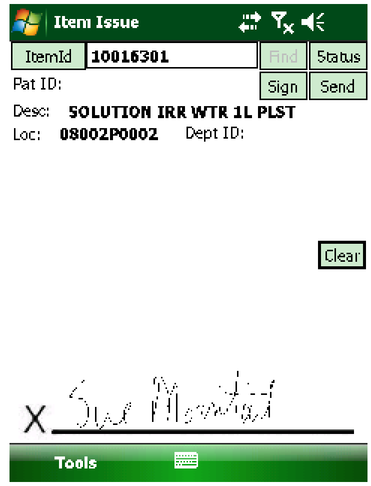


Figure 26

User captures the correct signature in Figure 26

User then ***clicks*** the Send button to send the information to the server or ***clicks*** the Status button to return to the Stock Status screen.

If the user has returned to the Stock Status screen they either proceed with issuing other items or send the Issued items from there.

All the **ISSUED** status items can be sent at once by ***TAPPING*** the Send All button or individually by ***highlighting*** an issue in **ISSUED** status and ***TAPPING*** the Send Selected button.

The issue creation is complete, and will be processed in the ERP system.

How to issue an item from multiple locations

If an item is set up with multiple storage locations and the following Org Group parameter is selected, users may issue an item from any of the storage locations.

If the following Org Group Parameter is selected users will have the ability to pick an item from multiple storage locations.

Allow issuing from multiple storage locations	☑	[Checking this will allow the user to issue items from multiple storage locations]

NOTE: If the above parameter is checked, the following profile parameter **MUST** be unchecked.

Storage Location required	☐	[Checking this will force the user to enter storage location at the time of issuing items]

To issue from multiple locations, enter Item ID from the Item Issue screen and TAP the Find **Figure 27**

If the item has multiple storage locations the screen in **Figure 28** appears

Using scroll bar, select item storage location and enter quantity. In this example, user is selecting a quantity from two storage locations.

When done ***TAP*** the Add button.

The items will be added to the issue – see **Figure 29**

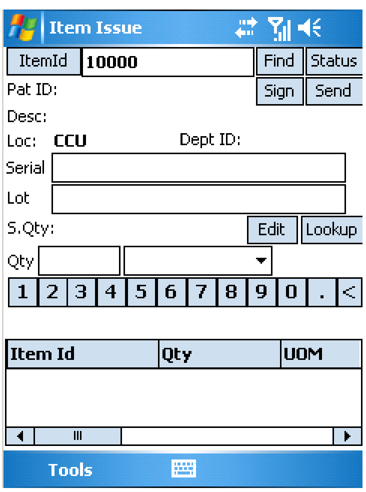


Figure 27

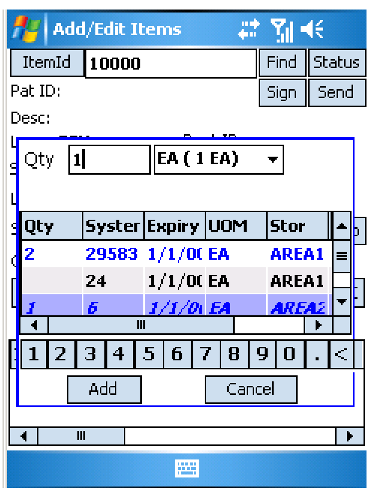


Figure 28

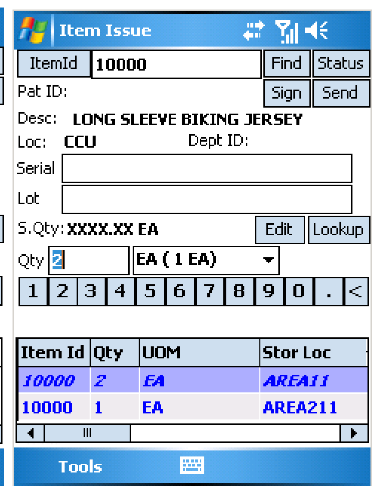


Figure 29

If the following Org Group Parameter is unselected users will only be able to issue an item from one storage location.

Allow issuing from multiple storage locations	☑	[Checking this will allow the user to issue items from multiple storage locations]

If the above parameter is unchecked and the following profile parameter is checked the screen the user must scan or enter the storage location of the item

.

Storage Location required	☐	[Checking this will force the user to enter storage location at the time of issuing items]

How to issue an item using the Lookup Screen

The Lookup functionality can be used to search for an item's storage location if a user doesn't know where the item is located and also can be used to look up to add an item to an issue.

If an item is not found by scanning the barcode label or entering the item manually with the Find button, the **Item Lookup** function can be used.

The user will ***TAP*** the Lookup button from the **Item Issue** screen **Figure 30** .

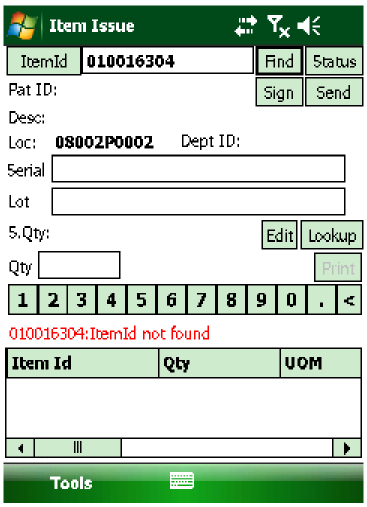


Figure 30

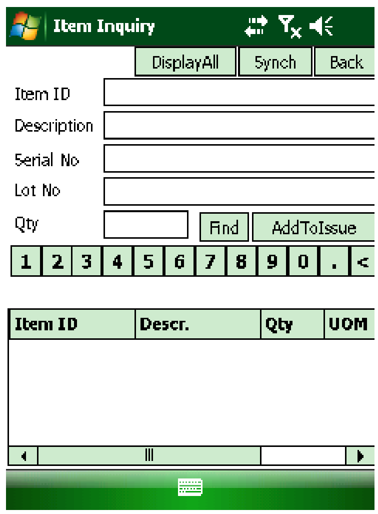


Figure 31

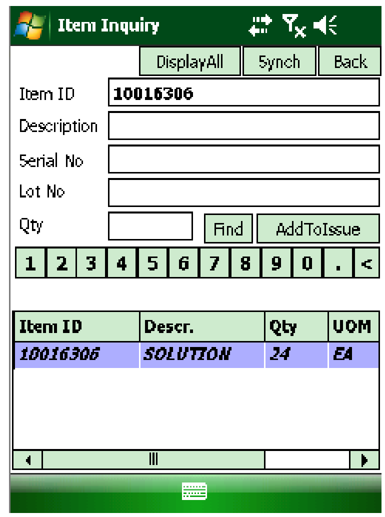


Figure 32

The **Item Inquiry** screen appears in **Figure 31**

This screen offers 4 search field options. The search fields can have complete or partial data entered. The 4 search fields are Item ID, Description (Item's description), Item's Serial Number (Serial No), or Item's Lot Number (Lot No).

Once data is entered into a search field ***TAP*** the Find button and the item should appear ***highlighted*** in **Figure 32**.

Enter a quantity to issue in the Qty field and ***TAP*** the AddToIssue button.

If the item is added successfully the screen in **Figure 33** will appear

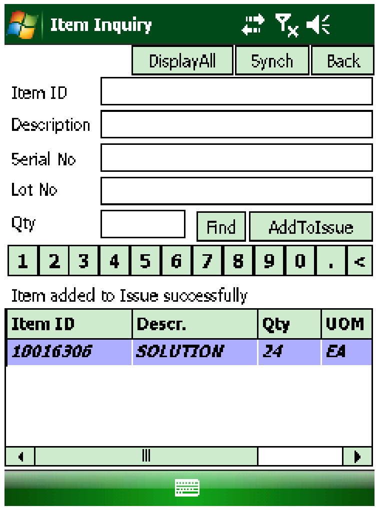


Figure 33

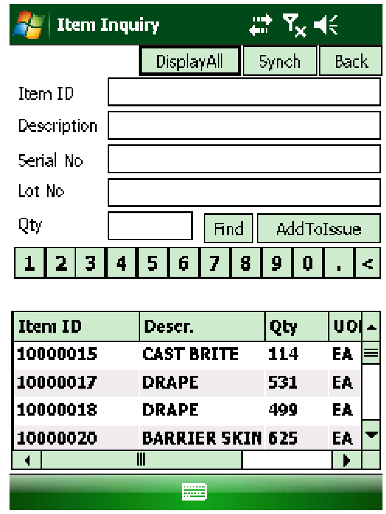


Figure 34

NOTE: The **Item Inquiry** screen also offers the ability to resynchronize data with the server.
TAP the Synch button and data is synched.

The DisplayAll will display all synched items for the Business Unit and is enabled based on the following profile parameter:

Display the DISPLAY ALL button on Item Inquiry	☑	[Checking this will display the DISPLAY ALL button on Item Inquiry screen]

TAP the DisplayAll button, which will display the synched data. **Figure 34**

The user can now select an item and enter quantity to add to the issue. Once all items they will ***TAP*** the Back button to return to Item Issue screen and process item issue as previously discussed in this document.

Stock Issue - Cancel

A mistake in an **ISSUED Status** item(s) that has not been sent to the server can be cancelled and removed by ***highlighting*** the **Issue** in **Figure 35**

TAP the Tools icon in the bottom left of the **Stock Status** screen. – **Figure 36.**

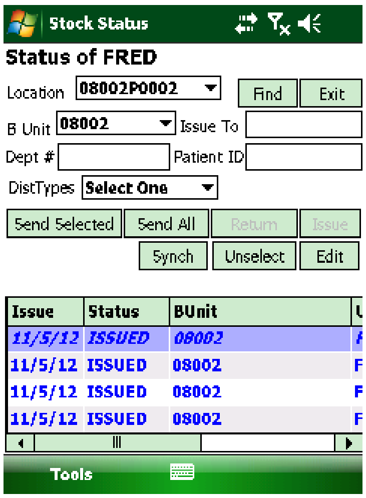


Figure 35

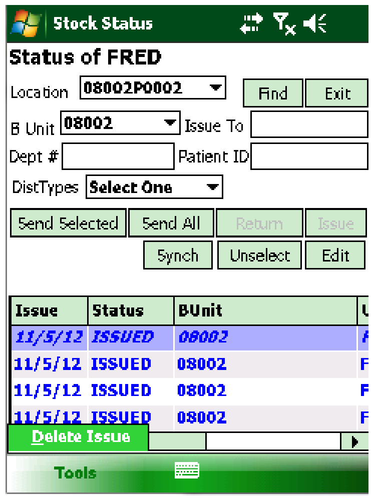


Figure 36

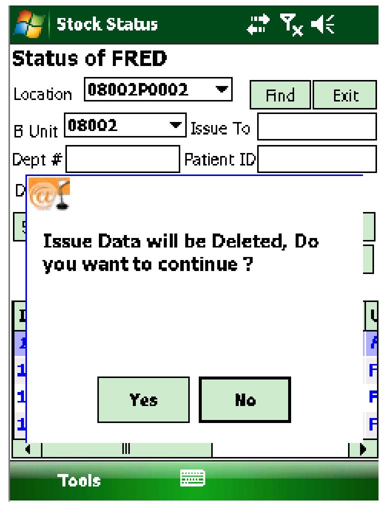


Figure 37

Select the **Delete Issue** option and the message in **Figure 37** appears

Click the No button to return to the **Stock Status** screen with no change to the issue.

Click Yes to move to the **Stock Status** screen and the issue status changes to **Cancelled Figure 38**

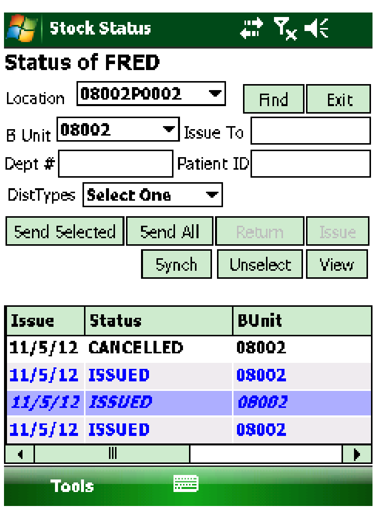


Figure 38

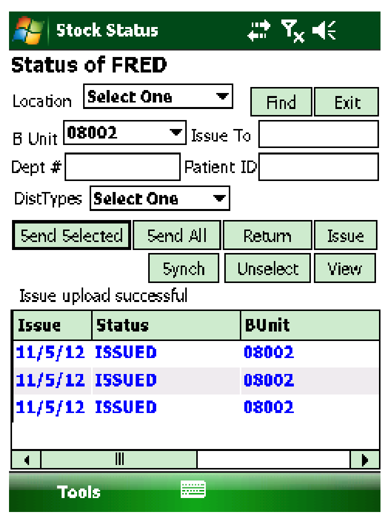


Figure 39

User now ***highlights*** the **Cancelled** issue and ***clicks*** either the Send All button or the Send Selected button.

The issue is recorded on the server and removed from the HHT. **Figure 39**

This is for tracking purposes, and the information is reflected in the **Daily User Activity Report**.

When a Web User/Supervisor ***clicks*** in the **Cancelled transactions box** of the **Daily User Activity Report** they will see the cancelled transactions, denoted in **"Yellow"**.

501 Kings Hwy, Fairfield, CT 068525 Phone: (888) 647-4721 Fax: (866) 714-2857

Stock Issue - Returns

To return an item to Stock/Inventory, HHT users can use the **Returns** function in the **Stock Issue** product.

The following Org Group Parameter selection must be identified prior to successfully transmitting Stock Issue Returns. Express Putaway and RMA Returns are transmitted to the ERP system based on Component Interfaces. Adjustment Return transmits data through the EIP tables.

Component Interface for Putaway	(•) Express Putaway ( ) RMA Returns ( ) Adjustment Return	[Selected Interface will be used to populate People Soft Tables]

Reason Code for Adjustment Return – If the Organization uses Adjustment Return, this Org Group Parameter must be populated with a valid PeopleSoft reason code for adjustments. This reason code loads to the EIP tables and back into PeopleSoft transactional tables. It is important that this Reason Code be populated with valid data, or the adjustment process in the PeopleSoft ERP system will error.

Reason Code for Adjustment Return	INVADJ	[REASON CODE for Adjustment return to be loaded into the interface tables for EIPs.]

NOTE: If the organization is using Adjustment Returns, please note that Department ID is not recorded in the BCT Tables, and will not be recorded into the transactional tables.

From the **Stock Status** screen, select the location, and ***TAP*** the Return button. **Figure 40** appears

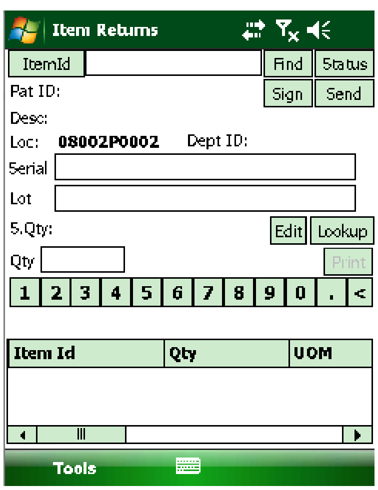


Figure 40

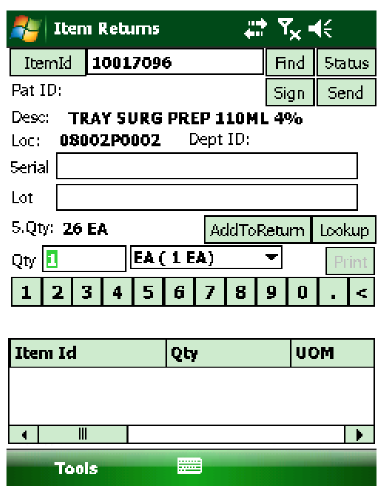


Figure 41

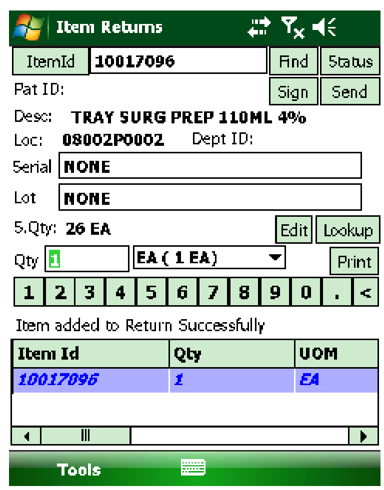


Figure 42

In the **ItemID** field, ***scan*** the Item's bar code label or ***enter*** the item id manually of the item being returned. If manually entering the item id user will ***TAP*** the Find button. **Figure 41**

Once the item is found, the default value of 1 will be displayed in the **Qty** field. The HHT user can adjust the qty as required, and enter the returned qty amount. Once the qty is entered, ***TAP*** the AddToReturn button. **Figure 42**

If a signature is required the user will ***TAP*** the Sign button to capture a signature then ***TAP*** the Send button or ***TAP*** the Status button to send later from the **Stock Status** screen.

If the HHT user selected the Status button record will display as **Return** status on the **Stock Status** screen **Figure 43**.

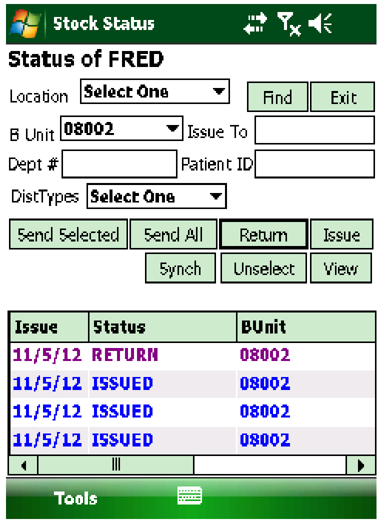


Figure 43

From the **Stock Issue Status** screen the HHT user can send the data to the server by using either the Send All button or the Send Selected button.

The return process is done.

NOTE: Other functionality such as LookUp, Edit, etc. are the same process in returning an item as previously discussed in issuing an item.

Stock Issue – Count

The Stock Issue application has been modified to enable customers to perform daily counts that will compare the count entered with the system quantity on hand (QOH) and create an issue transaction in PeopleSoft (PS) where the Physical QOH < the System QOH or a credit in PS if the counted quantity is greater than the system quantity.

As this functionality is similar to Issue and Return, it must be noted that the functionality was created for Inventory Business Units that do not require such close tracking of item usage by department – such as an IBU that is strictly used by the Operating Room so anything used from that IBU will always be charged to the Operating Room.

The following Org Group Parameters must be setup prior to using Stock Issue – Count

Reason value populated into the table – This Org Group Parameter must be populated with a valid PeopleSoft reason code for adjustments. This reason code loads to the EIP tables and back into PeopleSoft transactional tables. It is important that this Reason Code be populated with valid data, or the adjustment process in the PeopleSoft ERP system will error**. Note: If this is NOT populated with data, the HHT user will receive a General Server Error upon send**.

REASON value populated into the table	INVADJ	[REASON CODE to be loaded into the interface tables for EIPs.]

HHT users must have Inventory Business Units allocated to them.

A Count flag in the Allocate Inventory Business Units must be selected designating the IBU is using the count functionality. An example of the @Par Web page required allocations is in **Figure 44**

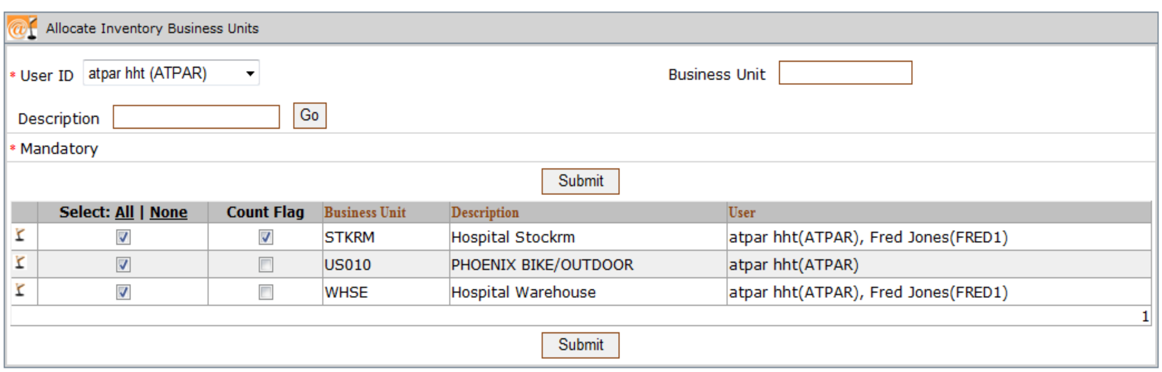


Figure 44

Once supervisors or @Par administrators have set up requirements when a user logs into the **Stock Issue** HHT the screen and selects the Count Flag Business Unit, the screen will appear as in **Figure 45**

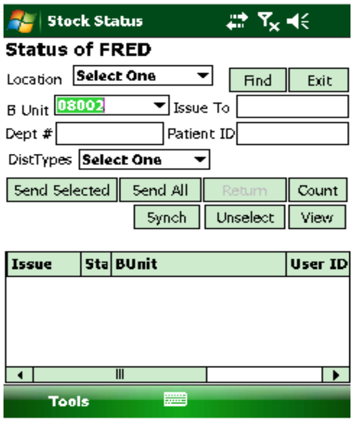


Figure 45

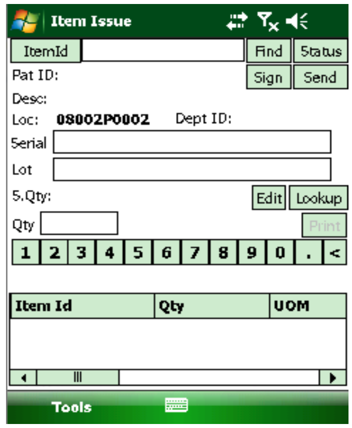


Figure 46

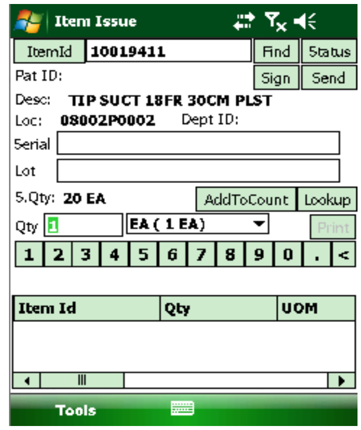


Figure 47

Select a location and click the Count button **Figure 46**

User will manually enter the item id and ***click*** the Find button or scan the item id bar code label. **Figure 47**

Enter required information and the counted quantity and ***TAP*** the Add To Count button **Figure 48**

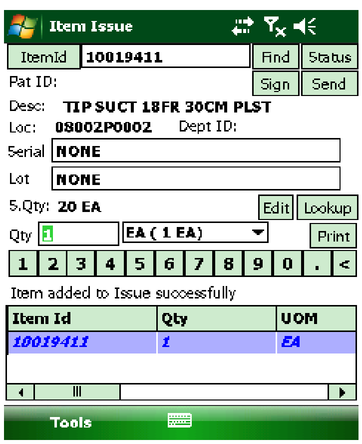


Figure 48

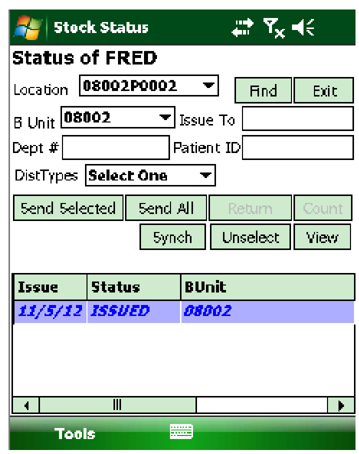


Figure 49

The process is the same as issuing an item or returning an item. When an item or all items have been counted, the Stock Status screen appears **Figure 49**

From the **Stock Issue Status** screen the HHT user can send the data to the server by using either the Send All button or the Send Selected button.

The count issue process is done.

Session Expiration

You will receive the popup message below (**Figure 50**) if you have exceeded the idle time allotted to you by the @Par Administrator. The @Par Administrator manages the HHT and login idle times and if you are experiencing frequent expiration message ask them to increase this setting.

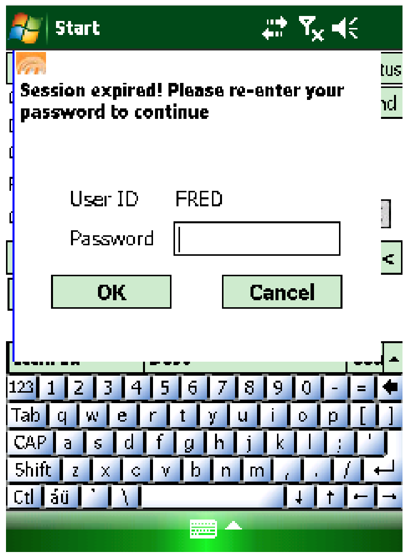


Figure 50

This is in place for a couple reasons:

1. If the session is left logged in, ANYONE could come to that HHT device and start entering information etc. So it is set up for Security Purposes.
2. HHT/System Performance. We have found that by having an inactive session time out, the performance of ALL HHTs and System is increased.

User needs to enter their password and return to the application.