# Product Requisitions – Authorize/Approve

**Functions:**
Search
Approval
Cancel a Line Item
Cancel Requisition
Backordered Product

**Business context**
All product requisitions must be approved before filling. This functionality allows authorized users at the replenishment source to approve a requisition, cancel a line item, or cancel the entire requisition. In addition, they can manually assign lot numbers or Holding Point Locations, if required.

**Triggers**
- A product requisition has been created and is ready for approval.
- A user would like to manually assign a lot number rather than have it assigned by Panorama.
- A line item on a requisition must be cancelled.
- The entire requisition must be cancelled.

**Standard Operating Procedures (SOPs)**
- Requisitioning and Shipping Products Between Holding Points

**Business Roles**
Product Requisition – Authorize/Approve is an inventory replenishment function. This functionality is performed by the Zone Biological Coordinators, the Bio Depot Biological Coordinator, and the Admin support staff.

**Panorama Role**
The Product Requisition – Authorize/Approve functionality is performed by both the Inventory Zone and the Inventory Provincial roles.

| ★ | <ul><li>If a requisition is submitted to the Bio Depot, approval takes place at the Bio Depot level.</li><li>Approvals for product requisitions submitted by external providers and requisitions submitted to a public health office from another public health office are approved at the zone level.</li></ul> |
|---|---|

**Steps: Search**

**Overview Steps**: Inventory Replenishment>Product Requisitions>Authorize/Approve>Add Search Criteria>Search

1. Select **Inventory Replenishment** from the Left Menu, **Product Requisitions**, then **Authorize/Approve**.



2. The **Search Requisitions** screen displays.
3. Enter the search criteria. The Bio Depot or the Main Public Health Units should search regularly for requisitions with **Pending Approval** or **Pending Manual Approval** status. If the Requisition ID is known, e.g., if shared by the public health office (the **Ship To Holding Point)**, it can be used.
4. Click the **Search** button.
5. The search results will display under **Approve Requisition Search Results**.

## Approve / Authorize

**Search Requisitions**                                        ⌃ Hide Search Requisitions

Ship To Holding Point: [                    ]   Search

Ship From Holding Point: [              ▾]        Requisition ID:        [140        ]

Requisition Status:  [Pending Manual Approva▾]    Requisition Type:    [              ▾]

Submit Date From: [    ] / [    ] / [    ] 🗓        Submit Date To:  [    ] / [    ] / [    ] 🗓
                  yyyy    mm     dd                                  yyyy    mm     dd

Catalogue Item Code: [                    ]       Product Alternate ID: [                    ]

Catalogue Item Name: [                    ]

Exception:        [              ▾]                Required Delivery:    [              ▾]

Override Holding Point Security ☐

                                                        [Search] [Retrieve] [Clear]

**Approve Requisition Search Results**            ⌃ Hide Approve Requisition Search Results

Your search criteria returned 1 result(s).

**Row Actions:** [Approve] [Authorize] [Change To Pending Approval]

| Submit Date | Requisition ID | Ship To Holding Point | Requisition Status | Requisition Type | Exception | Requested Delivery Date | Ship From Holding Point | Zone Number | Required Delivery |
|---|---|---|---|---|---|---|---|---|---|
| ☐ 2017 Oct 5 | 140 | Digby PHO-HP - Digby PHO | Pending Manual Approval | Regular | Yes | 2017 Oct 6 | Yarmouth PHO-HP | NA | Urgent |

Total: 1        ⏮ ◀ Page 1 of 1 ▶ ⏭                        Jump to page: [    ] ➥

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## Steps: Approval

| ★ | • If a **HP Status=Monitored**, a Product Requisition for the HP may still be approved. |
|---|---|

**Overview Steps**: Select Item>Click Approve>Complete required fields>Click Approve Requisition

1. Select the **checkbox** next to **Submit Date**. The **Row Actions** buttons will enable.
2. Click the **Approve** button.

**Approve Requisition Search Results**  ⌃ Hide Approve Requisition Search Results

Your search criteria returned 1 result(s).

Row Actions:  [ Approve ]  Authorize  [ Change To Pending Approval ]

| | Submit Date | Requisition ID | Ship To Holding Point | Requisition Status | Requisition Type | Exception | Requested Delivery Date | Ship From Holding Point | Zone Number | Required Delivery |
|---|---|---|---|---|---|---|---|---|---|---|
| ☑ | 2017 Oct 5 | 140 | Digby PHO-HP - Digby PHO | Pending Manual Approval | Regular | Yes | 2017 Oct 6 | Yarmouth PHO-HP | NA | Urgent |

Total: 1    ⏮ ◀ Page 1 of 1 ▶ ⏭    Jump to page: [        ] ➡

- Preferred Delivery Method

# Approve / Authorize                    ？ 🖨

**＊Approve Requisition**

| **Requisition ID:** | **Requisition Type:** | **Ship-to Address:** | **Bill-to Address:** |
|---|---|---|---|
| 140 | Regular | #1st Floor - 75 Warwick Street Digby NS B0V1A0 Canada | #1st Floor - 75 Warwick Street Digby NS B0V1A0 Canada |

**Ship To Holding Point:**    **Requestor Document Reference Number:**    **Requestor Requisition Date:**    **Delivery Zone:**

Digby PHO-HP - Digby PHO    -    2017 Oct 5    -

**＊Required Delivery:**    **Requested Delivery/Pickup Date:**    **Expected Pick Date:**    **＊Preferred Delivery Method:**

[ Urgent ▾ ]    [ 2017 ] / [ 10 ] / [ 06 ] 📅    2017 Oct 6    [ Courier ▾ ]
                 yyyy    mm    dd

**Carrier Name:**    **Requestor Contact Name:**    **Requestor Phone Number:**    **Ship-to Instructions:**

[         ▾ ]    HP Contact    -    [         ]

**Recipient:**    **Original Requisition ID:**

[                 ]

**Ship From Holding Point:**    **Comments:**    **Pick List Comment:**    **Shipping Manifest Comment:**

Yarmouth PHO-HP - Yarmouth PHO    [         ]    [         ]    [         ]

**Status:**    **Submitted By:**    **Date Submitted:**    **Urgent Reason:**

Pending Manual Approval    Parsons, Cheryl    2017 Oct 5 11:48 ADT    Product shortage

4.  Select the **checkboxes** for all line items in the requisition.
5.  Expand the section by clicking on the + symbol.

**Requisition Item Summary View**

Select All  Deselect All  Expand All  Collapse All

Row Actions:
Assign Lots / Holding Point Location(s)

Add Line Item   Cancel Line Item   Deny Line Item

| | | Product Alternate ID: | Catalogue Item Name: | Requestor QOH: | Requisition Quantity: | Authorized Quantity: | Approved Quantity: | Uncommitted Operational Quantity: | Average Monthly Demand: | Requisition Line Item Status: |
|---|---|---|---|---|---|---|---|---|---|---|
| ☑ | ⊖ | PPD(MDV) | PPD 1mL MDV | 0.0 | 10 | | 10 | 100.0 | 0.0 | Pending manual approval |

| Approver Comment: | Backorder Quantity: | Denied Quantity:  0.0 | Package Size:  1 |
|---|---|---|---|

| Authorizer Comment: | Quantity On Order:  0.0 | Unauthorized Operational Quantity:  100.0 | Package Units:  Vial |
|---|---|---|---|

| Catalogue Item Code:  45 | Requester Quota:  0.00 | Quota Amount To Date:  0.00 | Remaining Monthly Order Quantity:  0.0 |
|---|---|---|---|

| Exception:  Requisition Urgent | Line Item Requester Comment:  - | Requester Last QOH Adjustment:  - | Requester Last Count:  - |
|---|---|---|---|

**Payer Code:**

6. Enter the approved quantity in the **Approved Quantity** field for each line item selected.
7. To approve the line item, click Approve Requisition.



Save Requisition  Approve Requisition  Approve and Pick
Deny Entire Requisition  Cancel Entire Requisition  Cancel

8. If Product Lots/HPLs must be manually assigned for a line item, select the line item and click the **Assign Lots/Holding Point Location(s)** button in the **Requisition Item Summary View** section of the screen.



**Requisition Item Summary View**

Select All  Deselect All  Expand All  Collapse All

Row Actions:
Assign Lots / Holding Point Location(s)

Add Line Item   Cancel Line Item   Deny Line Item

9. Panorama displays the **Requisition / Return Item Related Details** screen. Select the item and enter the **Quantity for Requisition**.

**Approve / Authorize**                                        ⑦ 🖨

| **Requisition / Return Item Related Details** | | |
| --- | --- | --- |
| **Ship to Holding Point:** | **Catalogue Item Code:** | **Product Alternate ID:** |
| Digby PHO-HP | 45 | PPD(MDV) |
| **Catalogue Item Name:** | **Approved Quantity:** | **Unit of Measure:** |
| PPD 1mL MDV | 10.0 | Doses |

**Lots**

| | Lot Number | Original Expiry Date | Current Expiry Date | Holding Point Location | Uncommitted Quantity | Quantity for Requisition |
| --- | --- | --- | --- | --- | --- | --- |
| ☑ | C5037AB | 2018 Sep 30 | 2018 Sep 30 | Yarmouth-HPL1-Op | 100.0 | 10 |

Save   Cancel   Clear

10. Click **Save** to complete the lot assignment. A confirmation message will display. Click OK to continue. The system displays a success message.

**Approve / Authorize**                                        ⑦ 🖨

The selected lots have been assigned successfully.

11. The **Approve Requisition** screen displays. The status has changed to Pending Pick.

**Requisition Item Summary View**

Select All   Deselect All   Expand All   Collapse All

**Row Actions:**                         Add Line Item   Cancel Line Item   Deny Line Item
Assign Lots / Holding Point Location(s)

| | | Product Alternate ID: | Catalogue Item Name: | Requestor QOH: | Requisition Quantity: | Authorized Quantity: | Approved Quantity: | Uncommitted Operational Quantity: | Average Monthly Demand: | Requisition Line Item Status: |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| ☐ | ⊕ | Pneu-P-23(10) | Pneu-P-23 0.5mL Vial (10/Box) | 0.0 | 110 | | 100 | 100.0 | 0.0 | Pending manual approval |
| ☐ | ⊕ | PPD(MDV) | PPD 1mL MDV | 0.0 | 10 | | 10 | 100.0 | 0.0 | Pending pick |

**Steps: Add a Line Item**

1. To add a line item to the requisition, click the **Add Line Item** button.

**Requisition Item Summary View**

Select All   Deselect All   Expand All   Collapse All

**Row Actions:**                         [Add Line Item]   Cancel Line Item   Deny Line Item

2. The **Catalogue Item Search** screen displays. Search for the new product.

Catalogue Item Information

Catalogue Item Search

3. Click **Add Catalogue Item(s)** button.



Add Catalogue Item(s)    Return

4. The new product will display on the product requisition.
5. Add the quantity in the **Requisition Quantity** field.
6. Click **Save Requisition**.
7. Add the **Approved Quantity.**
8. If no further changes are required, click **Approve Requisition**.
   - **Note**: The screenshot illustrates backordered product. See the next section.

### Requisition Item Summary View

Select All    Deselect All    Expand All    Collapse All

Row Actions:                                                    Add Line Item    Cancel Line Item    Deny Line Item
Assign Lots / Holding Point Location(s)

| | | Product Alternate ID: | Catalogue Item Name: | Requestor QOH: | Requisition Quantity: | Authorized Quantity: | Approved Quantity: | Uncommitted Operational Quantity: | Average Monthly Demand: | Requisition Line Item Status: |
|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | ⊕ | Pneu-P-23(10) | Pneu-P-23 0.5mL Vial (10/Box) | 0.0 | 110 | | 100 | 100.0 | 0.0 | Pending manual approval |
| ☐ | ⊕ | PPD(MDV) | PPD 1mL MDV | 0.0 | 10 | | 10 | 100.0 | 0.0 | Pending manual approval |

Save Requisition    Approve Requisition    Approve and Pick

Deny Entire Requisition    Cancel Entire Requisition    Cancel

## Steps: Backordered Product

**Overview Steps**: Select Item>Click +>Add Available amount>Add Backordered Quantity>Add Comment>Approve Requisition

1. Select the line item for approval. Click the + symbol.
2. If there is insufficient inventory to fill the requisition, add the available amount in the **Approved Quantity** field and the outstanding amount in the **Backorder Quantity** field.
3. Add a comment.

| | | • | User may enter a **Backorder Quantity** for each catalogue item with an insufficient stock level. |
| | | • | **Line Item Approver Comment** is required when requisition quantity does not equal the approved quantity. |
| | | • | External providers should be advised if product is backordered. Internal holding points can follow the progress of their order in Panorama. |

4.  If no stock is available to fill the order, the line item may also be denied, rather than create a backorder. Click the **Deny Line Item** button.



5.  If no further changes are needed, click **Approve Requisition**.



6.  The system displays a confirmation message. The status changes to Pending Pick.
7.  A new product requisition is created for the backordered quantity.
8.  To search for the Backordered requisition, click **Product Requisitions – Manage Requisitions** on the Left-Hand Navigation menu.
9.  Under Requisition Status, add the holding point in the **Ship To Holding Point** field.
10. Select **Backordered** in the **Requisition Status** dropdown menu.

11. Click **Search**.

12. The requisition displays in the **Requisition Item Summary View** section.



13. To view the requisition, click on the Requisition ID.

| ★ | • The requisition with the backordered quantity is assigned a new Requisition ID.<br>• The Original Requisition ID is documented on the Requisition. |
| --- | --- |

## Steps: Cancel a Line Item

1. To cancel a line item, select the line item(s) and click the **Cancel Line Item** button.

## Requisition Item Summary View

| | | Product Alternate ID: | Catalogue Item Name: | Requestor QOH: | Requisition Quantity: | Authorized Quantity: | Approved Quantity: | Uncommitted Operational Quantity: | Average Monthly Demand: | Requisition Line Item Status: |
|---|---|---|---|---|---|---|---|---|---|---|
| ☑ | ⊖ | Pneu-P-23(10) | Pneu-P-23 0.5mL Vial (10/Box) | 0.0 | 110 | | 100 | 0.0 | 8.3 | Pending pick |

2. A confirmation message will display. Click OK.
3. The **Requisition Line Item Status** changes to Cancelled.



## Requisition Item Summary View

| | | Product Alternate ID: | Catalogue Item Name: | Requestor QOH: | Requisition Quantity: | Authorized Quantity: | Approved Quantity: | Uncommitted Operational Quantity: | Average Monthly Demand: | Requisition Line Item Status: |
|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | ⊕ | Pneu-P-23(10) | Pneu-P-23 0.5mL Vial (10/Box) | 0.0 | 110 | | | 100.0 | 0.0 | Cancelled |
| ☐ | ⊕ | PPD(MDV) | PPD 1mL MDV | 0.0 | 10 | | 10 | 90.0 | 0.8 | Pending pick |

| ★ | When cancelling a vaccine on a requisition, any associated diluents must also be cancelled. |
|---|---|

## Steps: Cancel Requisition

| ★ | Requisitions cannot be deleted in Panorama, only cancelled. Cancelling a requisition will make it view only, and the requisition status will be "Cancelled". |
|---|---|

1. To cancel a requisition, from the **Authorize/Approve** screen, click the **Cancel Entire Requisition** button.



2. The system displays a confirmation message. Click OK.
3. The system displays a success message.
4. Click the **Cancel** button to return to the search screen.