Catalogue Item – Zone Role

Functions:

- Search
- View Catalogue Item

Business context

The Panorama Catalogue includes all products available from the Bio Depot. Each catalogue item has a unique record in Panorama, with information organized in six levels, each representing a greater level of detail. The name of each level indicates the primary focus of the information captured at that level. When requisitioning products, users do so at "Level 5", which means they order the generic product, not specific brands. This ensures the products are distributed under the control of the Bio Depot.
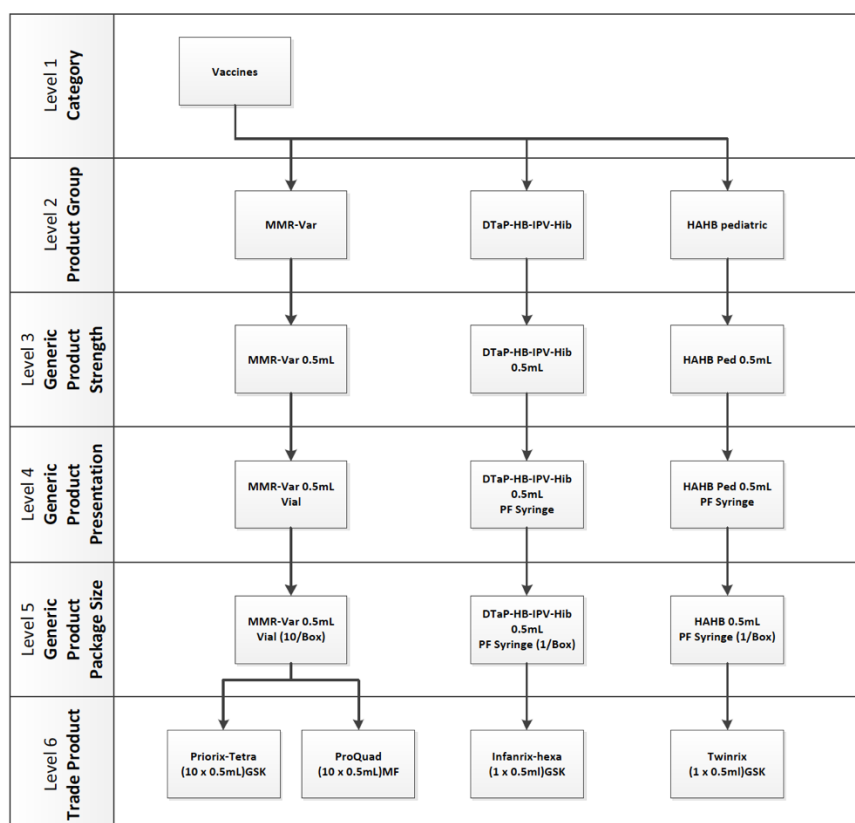
Level 1 – Category
Level 2 – Product Group
Level 3 – Generic Product Strength
Level 4 – Generic Product Presentation
Level 5 – Generic Product Package Size
Level 6 – Trade Product

All Panorama users may search for catalogue items and view the details at each level. The catalogue is maintained exclusively by the Bio Depot. The Add and Update functions allow Bio Depot staff to add and make updates for Catalogue items that can be acquired and distributed through Panorama.

Triggers
- A user needs to verify if a product is in the Panorama catalogue.
- A user needs to view detailed information about a catalogue item.

Business Roles
- The Search process will be performed in most cases by the Zone Biological Coordinators, the Bio Depot Biological Coordinator, and the Admin support staff
- Catalogue items will be added and updated by staff at the Bio Depot.

Panorama Roles
- The Inventory Zone and Inventory Provincial have permissions for Search and View.
- Permissions for adding and updating catalogue items, as well as associating diluent to products, are restricted to users with the Inventory Provincial role.

Catalogue Item Status
- **Active** catalogue items may be requisitioned.
- **Inactive** catalogue items are not available for requisitions.
- **Discontinued** indicates that the manufacturer no longer manufactures the product. Inventory transactions can still be performed against discontinued products.

Dose and SKU Conversion
- Stock Keeping Unit (SKU) is a standard term used in the supply and distribution industry to distinguish between products. SKU can be considered the package presentation, e.g., Boostrix 1 vial/box; Boostrix 10 vials/box
- Nova Scotia operates in doses; therefore, the setup of Panorama will apply doses wherever possible.
- All Holding Points will order in doses (set in the HP Product Profile). The Conversion Factor table, which is located at Level 6 in the Catalogue, will include doses to enable ordering from the Supplier in Doses.

Conversion
- In Panorama, two doses of "Boostrix (10 x 0.5mL) GSK" will equal two vials. The naming convention is intended to demonstrate that the product is sent to the Bio Depot as 10 in a box.
- Two doses of "Boostrix (1 x 0.5mL) GSK" will be two vials. The Bio Depot may fill the order with two single boxes.

Calculation
When in requisitions, returns, and inventory maintenance functions:
- Panorama calculate using the following:
  - o [SKU unit volume] / [Typical Dose size]

- If a typical dose is 0.5 mL and 1 vial contains 0.5 mL, then 1 vial = 1 dose
- To calculate how many doses come in a SKU (a box), then:
  - [SKU unit volume] / [Typical Dose size] x [Package Size]
  - If a typical dose is 0.5 mL and 1 vial contains 0.5 mL, and there are 10 in a box, then the calculation is:
    - 0.5 / 0.5 x 10 = 10 doses in a box

When in the contracts/PDR functions:
- Panorama pulls values from the Level 6 Catalogue Item conversion factor table values
  - SKU is the system default; conversion factors will relate to 1 SKU
  - Conversion factor = 1 SKU / [# of Doses in the box]
  - If 1 SKU has 1 Dose /box, then Cases conversion factor = 1
  - If 1 SKU has 10 Doses / box, then Doses conversion factor = 1/10 = 0.1
  - If 1 SKU has 5 Doses / box, then Doses conversion factor = 1/5 = 0.2

Steps: Search

★	- The same codes repeat between levels, e.g., the same code may be assigned to different products depending on the Catalogue Level. - Aside from the Catalogue screen, all catalogue searches from Inventory screens (Create Requisition, Returns, etc.) are performed using Level 5. - It is most appropriate to use the Level 5 Catalogue Item Code or the Product Alternate ID to do catalogue searches.

Overview Steps: Select Catalogue Item>Status Active>Search Criteria>Search

1. Select **Inventory Setup** from the Left Menu, then select the **Catalogue Item** link.
2. The **Catalogue Item Search** screen displays. For available items, select **Active** for Catalogue Item Status.
3. For an open search of all products in the catalogue, search without criteria.
4. For a specific search, enter search criteria, using one of the following method:
   - Levels 1-6 drop-down menus: Drill down by selecting an option at each level.
   - Add the Product Alternate ID to the field – type-ahead functionality is available.
   - Find Search String field: Add a generic product name, e.g., MMR
5. Click the **Search** button.

6. The search results display. For this search result, two trade names display (Level 6).

Search Results Returned

Your search criteria returned 2 result(s).
Select All   Deselect All

	Catalogue Item Code	Product Alternate ID	Catalogue Item Name	Catalogue Item Description	Catalogue Level	Current Catalogue Item Status
☐	53	MMR(10)	MMR¨ II(10 x 0.5mL)MF	Measles; Mumps; Rubella	6	Active
☐	54	MMR(10)	Priorix¨ (10 x 0.5mL)GSK	Measles; Mumps; Rubella	6	Active

7. Click on the different headings to change the order of items. For example, clicking on **Catalogue Item Code** will list the products in numerical order.

Steps: View Catalogue Item

Overview Steps: Search>Select Item>Click Catalogue Item Code hyperlink

1. Search for a catalogue item, following the search process.
2. Click the selected **Catalogue Item Code** hyperlink to view the catalogue item details.

Search Results Returned

Your search criteria returned 2 result(s).
Select All   Deselect All

	Catalogue Item Code	Product Alternate ID	Catalogue Item Name	Catalogue Item Description	Catalogue Level	Current Catalogue Item Status
☐	53	MMR(10)	MMR¨ II(10 x 0.5mL)MF	Measles; Mumps; Rubella	6	Active
☐	54	MMR(10)	Priorix¨ (10 x 0.5mL)GSK	Measles; Mumps; Rubella	6	Active

3. Panorama displays the **Catalogue Item Information** screen. The Catalogue Item screen contains information about Levels 1 to 6 for each Catalogue Item.

4. Level 1 is **Category**. In Nova Scotia, only vaccines are selected. Drugs will not be managed in Panorama.
   - Note that the status is Active. Only Active vaccines may be ordered.

Catalogue Item Information

*Level 1 - Category ✔ Contains Data ⌃ Hide Level 1

Catalogue Code:	*Catalogue Item Category:	*Current Catalogue Item Status:	*Effective Date of Current Status:
000000000002	Vaccines	Active	2017 Jan 1
Created By:	Created Date:	Last Updated By:	Last Updated Date:
PERMISSIONS, ALL	2017 Jul 14		
Chart Of Accounts			

5. Level 2 is **Product Group**, e.g., Hib. This section contains the agent (Hib), the Antigens, and the SNOMED code, as well as a detailed catalogue item description and the Created Date (the date the item was added to Panorama).

*Level 2 - Product Group ✔ Contains Data ⌃ Hide Level 2

Catalogue Code:	Catalogue Item Description:	*Current Catalogue Item Status:	*Effective Date of Current Status:
000000000018	Haemophilus influenzae type b	Active	2017 Jan 1
Created By:	Created Date:	Last Updated By:	Last Updated Date:
PERMISSIONS, ALL	2017 Jul 14		
*Catalogue Item Name:	*Product Group Name:	AHFS Code:	ATC Code:
Hib	Hib		
*Agent:	Antigens:	SNOMED Code:	
Hib	Haemophilus[more...]	333680004	

Rx:
☐

6. Level 3 is **Generic Product Strength**, e.g., Hib 0.5 mL. The dose size and unit of measure can be viewed. Status and Created Date are included.

*Level 3 - Generic Product Strength ✔ Contains Data ⌃ Hide Level 3

Catalogue Code:	Catalogue Item Description:	*Current Catalogue Item Status:	*Effective Date of Current Status:
000000000021	Haemophilus influenzae type b	Active	2017 Jan 1
Created By:	Created Date:	Last Updated By:	Last Updated Date:
PERMISSIONS, ALL	2017 Jul 14		
*Catalogue Item Name:	*Strength:	*Typical Dose Size:	*Typical Dose Size Unit of Measure:
Hib 0.5mL	0.5	0.5	mL

7. Level 4 is **Generic Product Presentation**. The presentation Type is added, e.g., Vial, and may be viewed. This section includes the Route of Administration, in addition to Status and Created Date.

* Level 4 - Generic Product Presentation		✓ Contains Data	⌃ Hide Level 4
Catalogue Code:	**Catalogue Item Description:**	*** Current Catalogue Item Status:**	*** Effective Date of Current Status:**
000000000022	Haemophilus influenzae type b	Active	2017 Jan 1
Created By:	**Created Date:**	**Last Updated By:**	**Last Updated Date:**
PERMISSIONS, ALL	2017 Jul 14	PERMISSIONS, ALL	2017 Jul 14
* Catalogue Item Name:	*** Presentation Type:**	*** Presentation Volume:**	*** Presentation Volume Unit of Measure:**
Hib 0.5mL Vial	Vial	0.5	mL
* Route of Administration:			
Intramuscular			

8. Level 5 is **Generic Product Package Size**. This level displays the number of items in a package, e.g., 5 to a Box. The Dose Conversion Factor is the number of doses per package or SKU. In this example, there are five Vials per Box. Each vial contains a .5mL dose.
9. If the product is a diluent, the Diluent box will be checked.
   • Note: In the future, SKU Package Unit of Measure will not include a value.

* Level 5 - Generic Product Package Size		✓ Contains Data	⌃ Hide Level 5
Catalogue Code:	**Catalogue Item Description:**	*** Current Catalogue Item Status:**	*** Effective Date of Current Status:**
000000000022	Haemophilus influenzae type b	Active	2017 Jan 1
Created By:	**Created Date:**	**Last Updated By:**	**Last Updated Date:**
PERMISSIONS, ALL	2017 Jul 14	PERMISSIONS, ALL	2017 Jul 14
* Catalogue Item Name:	*** Package Size:**	**Package Units:**	**SKU Volume:**
Hib 0.5mL Vial (5/Box)	5	Vial	2.500
SKU Volume Unit of Measure:	**Dose Conversion Factor:**	**Jurisdiction Use Only:**	**Restricted For Emergency Use:**
mL	5.000	☐	☐
Always Requires PHD Authorization:	**GST Exempt:**	**PST Exempt:**	**HST Exempt:**
☐	☐	☐	☐
Product Alternate Description:	**Lot Controlled:**	**Requires Manual Approval:**	**Jurisdictional Depot Requires PHD Authorization:**
[ ] [ ] [ ]	☑	☐	☐
SKU Package Unit of Measure:	**Product Specification:**	*** Product Alternate ID:**	**List Price:**
Vial	[ ]	Hib(5)	[ ]
Diluent:			
☐			

10. Level 6 is **Trade Product**. It contains the Trade Name, in addition to the information from Levels 1 – 5. Other information may be viewed:
   - Short Date Period - If the current date is within the number of days entered into this field of the product's expiry date, then it is considered to be 'short-dated'. In Nova Scotia, the Short-Date period for vaccines is 90 days.
   - Cold Chain Required dropdown, e.g., Refrigerated.
   - Manufacturer Code

	The **Conversion Factor Unit** table displays the conversion of Doses and Boxes to SKUs. For example, a SKU is one box and contains five doses/Vial of Act Hib. • Product requisitions are ordered in doses. • The Bio Depot orders in Doses. • SKU (Stock Keeping Unit) is a manufacturer term. • SKUs are a Panorama default.

11. Click the **Cancel** button in the button right hand corner of the screen to return to the Search screen.