

## Order Set

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### Functions:

[Search](#)

[View Order Set](#)

[Create Order Set](#)

[Add a New Holding Point to the Order Set](#)

[Update Order Set](#)

### Business context

An order set is a collection of catalogue items. The order set attached to each holding point will contain the products the holding point can order. Nova Scotia will have one order set that contains all products that are available for order within the Panorama Catalogue. Each holding point that orders vaccine in Nova Scotia will be added to this order set.

### Triggers

- Upon Go Live, a Nova Scotia order set must be created.
- A new product is available and must be added to the existing order set.
- A new holding point profile has established and must be added to the order set.
- A user wishes to view the products contained in the order set.

### Business Roles

Order sets may be viewed by the Biological Coordinators, the Bio Depot Biological Coordinator, the Admin staff, and other roles as needed. In the future, each holding point will be added to the order set during the holding point profile creation by the Biological Coordinator at the zones. The initial order set will be created after Go Live and all current holding points will be added to it. This task will be completed by a staff member at the Bio Depot.

### Panorama Role

The Inventory Provincial and Inventory Zone roles have permissions for all Order Set functions.

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### Steps: Search

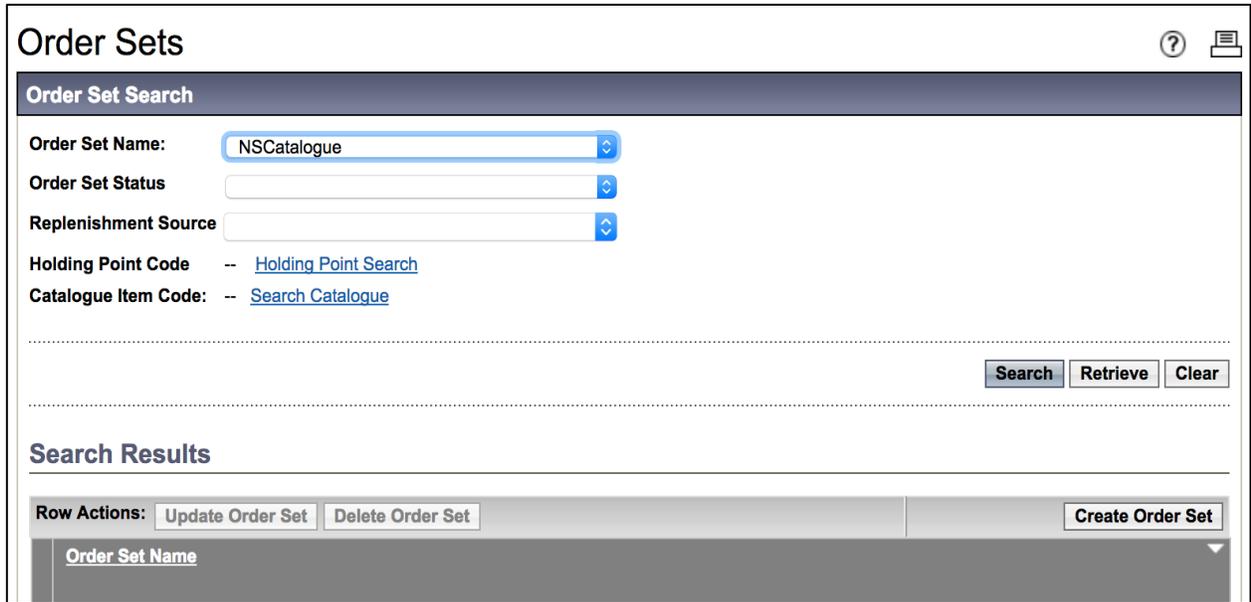
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**Overview Steps:** Inventory Setup>Order Set> Select Order Set from **Order Set Name** dropdown>Search

1. **Order Set** is a Panorama setup function. To begin a search, click **Inventory Setup** on the Left-Hand Navigation Menu then click **Order Set**.

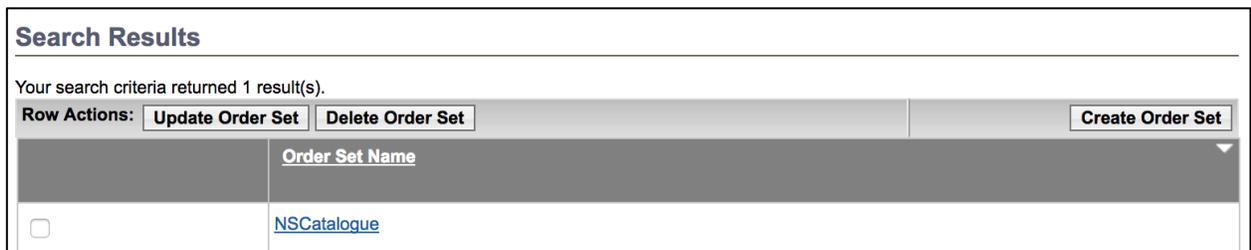
- ▼ **Inventory Setup**
- Product Lot
- Contract
- Supplier Purchase Requisitions
- Supplier
- Catalogue Item
- Order Set

2. The **Order Set Search** screen display.



The screenshot shows the 'Order Sets' application window. The 'Order Set Search' section contains several input fields: 'Order Set Name' (dropdown menu with 'NSCatalogue' selected), 'Order Set Status' (dropdown menu), and 'Replenishment Source' (dropdown menu). Below these are two links: 'Holding Point Code' with a link to 'Holding Point Search' and 'Catalogue Item Code' with a link to 'Search Catalogue'. At the bottom right of the search section are three buttons: 'Search', 'Retrieve', and 'Clear'. Below the search section is the 'Search Results' section, which includes a table with row actions: 'Update Order Set', 'Delete Order Set', and 'Create Order Set'. A dropdown menu for 'Order Set Name' is visible at the bottom of the results table.

3. Select the **Order Set Name** from the dropdown menu. An open search is not necessary because Nova Scotia will only create one order set.
4. Click the **Search** button.
5. The order set displays in the **Search Results** section.



The screenshot shows the 'Search Results' section. It displays the message 'Your search criteria returned 1 result(s)'. Below this is a table with row actions: 'Update Order Set', 'Delete Order Set', and 'Create Order Set'. The table has a column for 'Order Set Name' and a checkbox in the first row. The 'Order Set Name' column contains the text 'NSCatalogue'.

### Steps: View Order Set

**Overview Steps:** Search>Select Order Set>View Order Set>Cancel

1. Follow the Order Set search process.
2. Select the order set and click the **Update Order Set** button.

**Search Results**

Your search criteria returned 1 result(s).

Row Actions: **Update Order Set** Delete Order Set Create Order Set

	Order Set Name
<input type="checkbox"/>	<a href="#">NSCatalogue</a>

- The **Order Set Details** screen displays. The catalogue items attached to the order set may be viewed, as well as the holding points and details about the order set.
  - Order Set Name
  - Effective From Date: The date the order set was created
  - Safety Stock Level: Minimum desired inventory level at any point in time
  - Maximum Stock Level for order set: Maximum desired inventory level at any point in time; used for reporting and analysis; and used for calculating order quantity
  - Inventory Group: Select A but note that the decision to assign product to A or B is a business decision. (More information is documented under Create Order Set process).
  - Unit of Measure: Doses
  - Safety Stock and Maximum Measures: Type of Measure for the safety stock and maximum levels at the HP. Nova Scotia will use Doses.

**\* Order Set Details**

\* Required Field

\* Order Set Name:       \* Effective From Date:  /  /        Effective To Date:  /  /

yyyy      mm      dd      yyyy      mm      dd

Program:

Replenishment Source:        \* Safety Stock Level:       \* Safety Stock and Maximum Measure:

\* Unit of Measure:        \* Inventory Group:        \* Maximum Stock Level:

Order Set Description:       Requires PH Authorization:       Inactive:       Retain HP Product:

**Order Set Catalogue Items**

- Click **Cancel** to return to the search screen.

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## Steps: Create Order Set

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**Overview Steps:** Search>Click **Create Order Set**>Add Order Set details>Add Catalogue Items>Add Holding Points>Save

- Complete an Order Set search.
- If the order set does not exist, click the **Create Order Set** button on the Search Results page.

Search Results		
Your search criteria returned 1 result(s).		
Row Actions:	<input type="button" value="Update Order Set"/> <input type="button" value="Delete Order Set"/>	<input type="button" value="Create Order Set"/>

	<ul style="list-style-type: none"> <li>• <b>Inventory Group = A:</b> Products will be included in the Plan Replenishment function, which is related to Forecasting.</li> <li>• Given that NS is not using these functions until the future, when a user submits a requisition for any product in Inventory Group A, they will see the following message at the top of the screen: “products should be managed using its Replenishment Plan.” The user may proceed and this will not impede the requisition process.</li> <li>• <b>Inventory Group = [not ‘A’]:</b> Products will not be included in the Plan Replenishment/Forecasting function, but Panorama will suggest a quantity that equals: <i>[Maximum Stock Level] minus [Available Quantity] minus [Quantity on Order]</i>.</li> <li>• Users can submit product requisitions for a different amount than the suggested requisition quantity.</li> </ul>
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4. The **Order Set Details** screen displays.
5. Add all required information.
  - Order Set Name
  - Effective From Date: Auto-populates with today’s date. Change if needed.
  - Safety Stock Level: Minimum desired inventory level at any point in time; select at least 1.
  - Maximum Stock Level: Maximum desired inventory level at any point in time; used for reporting and analysis; and used for calculating order quantity.
  - Inventory Group: Populates with A. For more information, see information box above.
  - Unit of Measure: Doses
  - Safety Stock and Maximum Measures: Doses

	<ul style="list-style-type: none"> <li>• If a catalogue item already exists on the holding point profile, the only attribute from the Order Set to be updated is the Order Set ID. The rest of the information in the holding point product record will remain the same.</li> <li>• If adding/modifying a single product without using an order set, the above information can be entered/modified in the holding point’s product profile.</li> </ul>
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6. Click the **Add Catalogue Item** button.

**\* Order Set Details**

\* Required Field

\* Order Set Name:       \* Effective From Date:  /  /        Effective To Date:  /  /

Program:

Replenishment Source:       \* Safety Stock Level:       \* Safety Stock and Maximum Measure:

\* Unit of Measure:        \* Inventory Group:        \* Maximum Stock Level:

Order Set Description:       Requires PH Authorization:       Inactive:       Retain HP Product:

**Order Set Catalogue Items**

Row Actions:

7. The **Catalogue Item Search** screen displays. Search without criteria to generate a list of all catalogue items in the Panorama Catalogue.
8. Under **Search Results Returned**, click **Select All**. The full set of items will be selected.
  - A few catalogue items are not available. They may be individually de-selected.

**Catalogue Item Search**

Search/Add Catalogue Item - Search Required Before Adding

Catalogue Item Code:       Product Alternate ID:

Catalogue Item Status:         Find Search String:

Level 1 - Category:

Level 2 - Product Group:

Level 3 - Generic Product Strength:

Level 4 - Generic Product Presentation:

Level 5 - Generic Product Package Size:

**Search Results Returned**

Your search criteria returned 65 result(s).

<input type="checkbox"/>	Catalogue Item Code	Product Alternate ID	Catalogue Item Name	Catalogue Item Description	Catalogue Level	Current Catalogue Item Status
<input checked="" type="checkbox"/>	2	BAT(1)	BAT 50mL Vial (1/Box)	Botulism antitoxin heptavalent	5	Active

9. Scroll to the bottom of the screen and click **Add Catalogue Item**.

10. The Order Set will populate with the catalogue items.
11. Click **Save**.
12. To add Holding Points to the Order Set, click the **Add Holding Point** button.

### Holding Points

Row Actions: Remove

Add Holding Point

Select All
Deselect All

Organization Unit	Holding Point	Secondary HP Name	Holding Point Type
Total: 0			

Page 1 of 1
Jump to page:

Save
Cancel

13. The **Holding Point Profile** screen displays. Complete an open search without criteria. All holding points listed in Panorama will display.

### Holding Point Profile

Your search criteria returned (593) result(s).

Holding Point Profile Search
Hide Holding Point Profile Search

### Holding Point Profile Results

Your search criteria returned (593) result(s).

Select All
Deselect All

Row Actions: Copy
Add Holding Points
Return
Update

Create

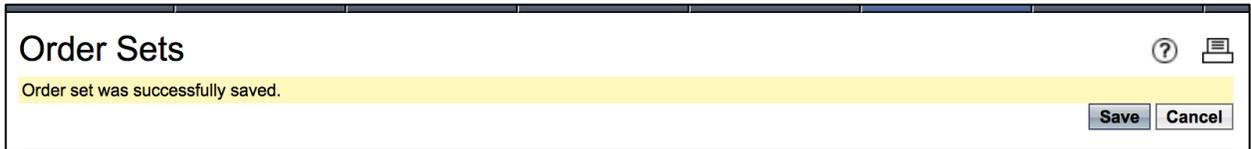
Change Parameters for Multiple Holding Points

Holding Point	Secondary HP Name	HP Status	Ship from/return to	HP Type
<input checked="" type="checkbox"/> Aberdeen Hospital-General-HP - Aberdeen Hospital-G...	-	Active	835 East River Road New Glasgow B2H3S6	Hospital

14. To add the order set to all holding points, click **Select All**. This action section all the holding points on the list.
15. Sort by **HP Type**.
16. Deselect all Transit Points.
17. Click **Add Holding Points**. All Holding Points, save for the Transit Points, will be added to the Order Set.

	<p><b>NOTE:</b> Adding all the holding points to an order set is a one-time task to be completed after Go Live.</p>
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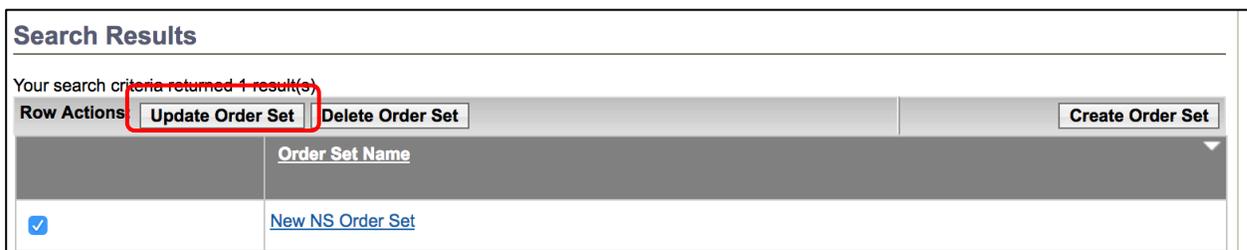
18. The **Order Set Details** screen displays with the added holding points.
19. Click **Save**.
20. A confirmation message displays.



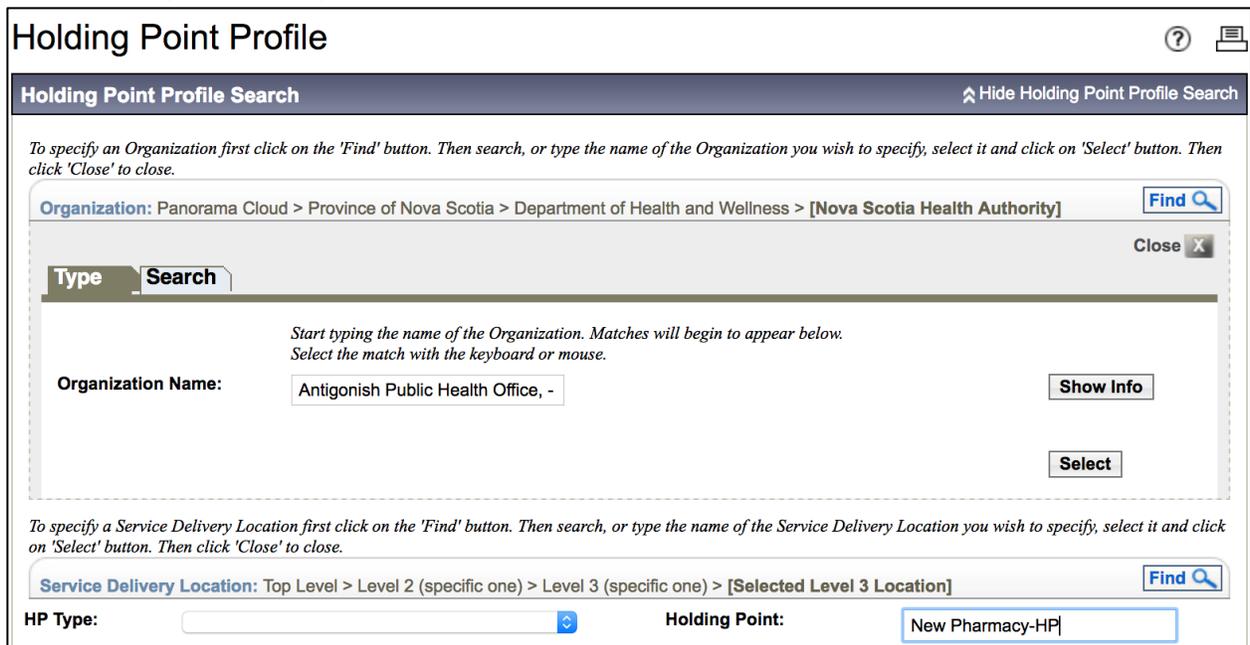
## Steps: Add New Holding Point to Order Set

**Overview Steps:** Search>Select Order Set>Click Update Order Set>Click Add Holding Point>Search for Holding Point on Holding Point Profile screen>Click Add Holding Point>Save

1. Complete an **Order Set** search.
2. Select the Order Set and click the **Update Order Set** button.



3. The **Order Set Details** screen displays.
4. Scroll to the **Holding Points** section and click the **Add Holding Point** button. See the **Create Order Set** section above.
5. The **Holding Point Profile** screen displays.
6. Click the **Override Holding Point Security** button.
7. Add search criteria and search for the new Holding Point.
  - **IMPORTANT:** Ensure the correct HP Status is selected. A new Holding Point at this point in the process will be in **Draft** Status.



- Select the new Holding Point and click the **Add Holding Points** button.

Row Actions:	Copy	Add Holding Points	Return	Update		Create
	Change Parameters for Multiple Holding Points					

- The new Holding Point is added to the Order Set.
- Click **Cancel**.

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### Steps: Update Order Set

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**Overview Steps:** Search>Select Order Set>Click Update Order Set> Updates>Save>Cancel

- Complete an Order Set search.
- Select the Order Set and click the **Update Order Set** button.
- The **Order Set Details** screen displays.
- Make updates to the header details or click **Add a Catalogue Item** to add new products to the order set. See **Create Order Set**.

## Order Sets

? ☰  
Save Cancel

**\* Order Set Details**

\* Required Field

<b>* Order Set Name:</b>	<b>* Effective From Date:</b>	<b>Effective To Date:</b>
<input type="text" value="New NS Order Set"/>	<input style="width: 50px;" type="text" value="2017"/> / <input style="width: 50px;" type="text" value="08"/> / <input style="width: 50px;" type="text" value="23"/>	<input style="width: 50px;" type="text"/> / <input style="width: 50px;" type="text"/> / <input style="width: 50px;" type="text"/>
	yyyy mm dd	yyyy mm dd

**Program:**

<b>Replenishment Source</b>	<b>* Safety Stock Level</b>	<b>* Safety Stock and Maximum Measure</b>
<input style="width: 100%;" type="text"/>	<input type="text" value="1"/>	<input type="text" value="Doses"/>
<b>* Unit of Measure</b>	<b>* Inventory Group</b>	<b>* Maximum Stock Level</b>
<input type="text" value="Doses"/>	<input type="text" value="A"/>	<input type="text" value="12,500"/>

<b>Order Set Description</b>	<b>Requires PH Authorization:</b>	<b>Inactive:</b>	<b>Retain HP Product:</b>
<input style="width: 100%;" type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Order Set Catalogue Items

Row Actions: <input type="button" value="Remove"/>	<input type="button" value="Add Catalogue Item"/>
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- Click **Save**.
- Click **Cancel**.