

## Product Delivery Request (PDR) - Manage

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Functions:

[Search](#)

[View Product Delivery Request](#)

[Create Product Delivery Request](#)

[Cancel Line Item](#)

[Cancel PDR](#)

### Business context

Product Delivery Requests (PDRs) are issued to request product from a supplier. PDRs are issued against the contract, i.e., each PDR represents a partial or full amount that was agreed to in the contract.

**Pre-requisite:** To issue a PDR, a supplier and contract must exist in Panorama. The contract must have Landed status.

### Triggers

- Bio Depot staff would like to view PDR information.
- Bio Depot requires product for distribution to the zones.
- A PDR must be updated.
- A product on a PDR must be cancelled.
- The PDR must be cancelled.

### Standard Operating Procedures (SOPs)

- Ordering and Receiving Products from Suppliers or Public Services Procurement Canada (PSPC)

### Business Roles

PDRs are completed by the Bio Depot Biological Coordinator, with support from the Admin staff.

### Panorama Role

The Panorama PDR functionality is restricted to users with the Inventory Provincial role.

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### Steps: Search Product Delivery Request (PDR)

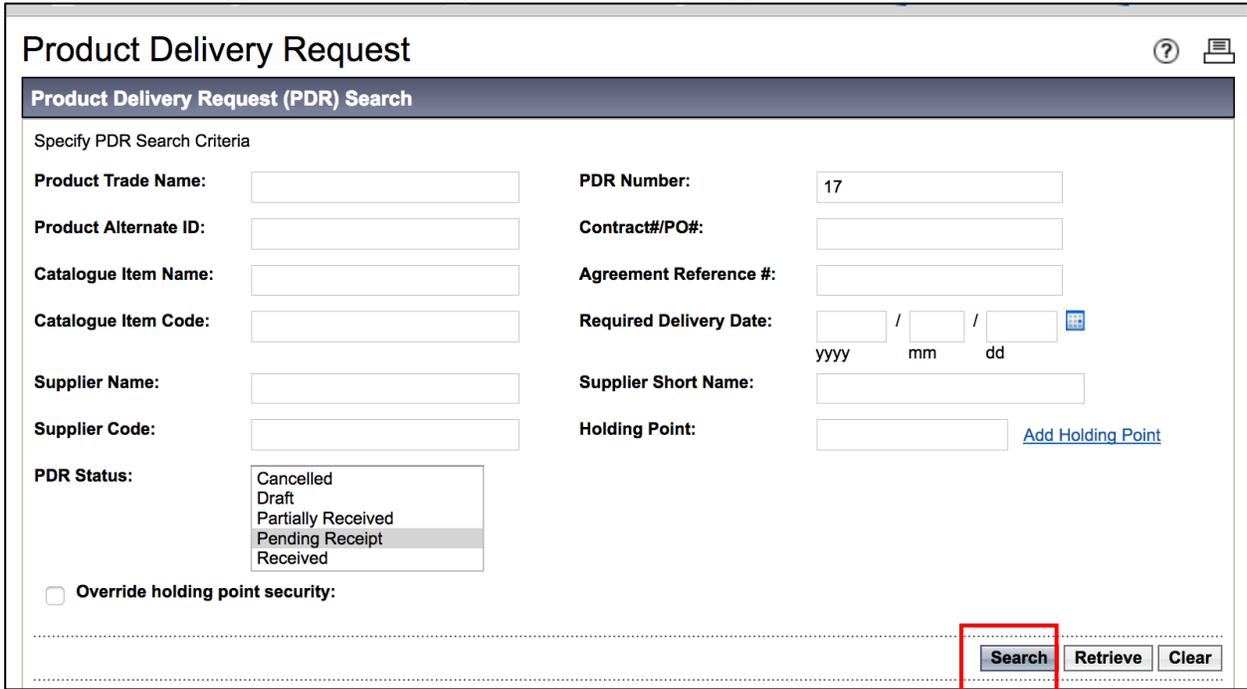
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**Overview Steps:** Inventory Replenishment>Product Delivery Request>Manage PDRs>Add search criteria>Search

1. Select **Inventory Replenishment** from the Left-Hand Navigation Menu; select **Product Delivery Request**, then **Manage PDRs**.

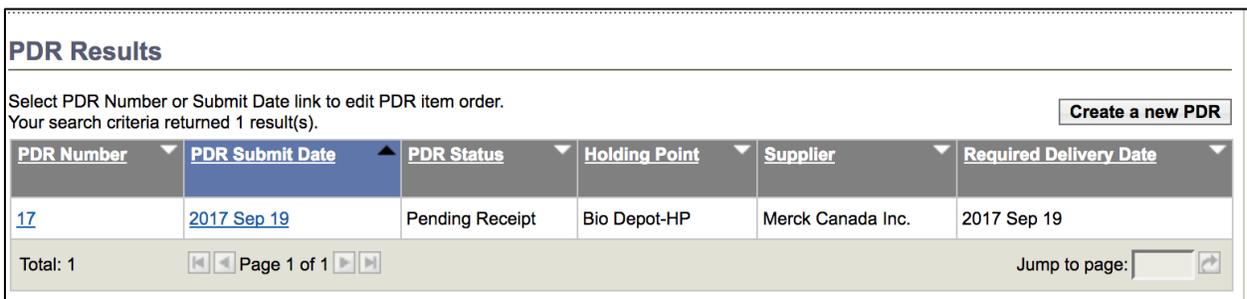


2. The **Product Delivery Request (PDR) Search** screen displays.



3. Enter the search criteria. Recommended search criteria include PDR status or Catalogue Item Name. Click the **Search** button.

4. The search results display in the **PDR Results** section.



## Steps: View Product Delivery Request (PDR)

**Overview Steps:** Search>Select PDR>Click PDR Number hyperlink>View PDR>Cancel

1. Click on the **PDR Number** hyperlink.

**PDR Results**

Select PDR Number or Submit Date link to edit PDR item order. [Create a new PDR](#)  
 Your search criteria returned 1 result(s).

PDR Number	PDR Submit Date	PDR Status	Holding Point	Supplier	Required Delivery Date
<a href="#">17</a>	<a href="#">2017 Sep 19</a>	Pending Receipt	Bio Depot-HP	Merck Canada Inc.	2017 Sep 19

Total: 1 Page 1 of 1 Jump to page:

2. Panorama displays the **Edit PDR** screen. View the details.

**Product Delivery Request**

**Edit PDR**

\* Required Field

Number: 17  
 PDR Cost: \$175.00  
 Status: Pending Receipt  
 \* Requestor: Bio Depot-HP  
 \* Requestor Contact Name: test  
 \* Requestor Phone #: ( 998 ) 798 9879 ext. 7  
 Requestor Fax #: ( )  
 \* Required Delivery Date: 2017 / 09 / 19  
 \* Ship-to Address: #5 - 7 Mellor Avenue, Burnside NS B3B0E8, Canada  
 Use Ad Hoc Address [Generate Ad Hoc Address](#)

Supplier Name: Merck Canada Inc.  
 \* Contract#/PO#: Contract01  
 Agreement Reference #: 12  
 Buyer:  
 Comments:

Ad Hoc Ship To Address:  
 Ship-to Instructions:  
 \* Bill-to Address: #5 - 7 Mellor Avenue, Burnside NS B3B0E8, Canada

**PDR Item Summary View**

Line Item Status	Product Alternate ID	Catalogue Item Name	Available Qty	Unit of Measure	Qty On Order	Qty Available to Order	Recommended Qty	* Requested Qty	* Requested Qty Unit of Measure	* Unit Cost
<input checked="" type="checkbox"/>	Pneu-P-23(10)	Pneumovax®23(10 x 0.5mL)MF	949.0	Doses	<a href="#">1,000.0</a>	1,500.0	10,560.0	<input type="text" value="0"/>	Dose(s)	0.00
<input checked="" type="checkbox"/>	HPV-4(10)	Gardasil®(10 x 0.5mL)MF	8,397.0	Doses	<a href="#">2,020.0</a>	91,570.0	2,090.0	<input type="text" value="10"/>	Dose(s)	2.50

[View History](#) [Submit](#) [Save](#)  
[Cancel PDR](#) [Cancel](#) [Print](#)

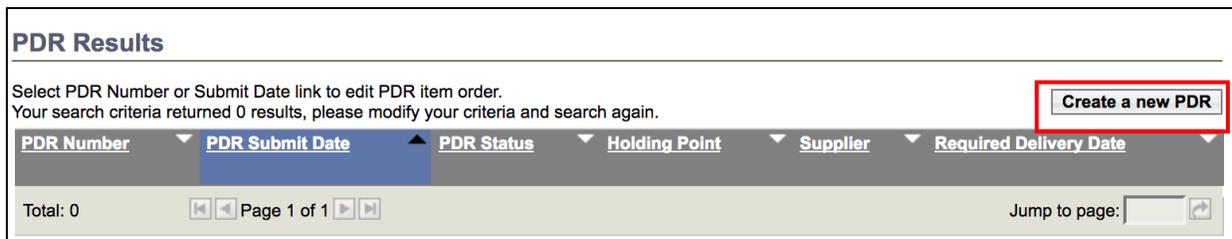
3. Click **Cancel** to return to the Search screen.

**Steps: Create Product Delivery Request (PDR)**

★	<p><b>Pre-requisites</b></p> <ul style="list-style-type: none"> <li>• A supplier of the PDR product must be in Panorama, prior to creating the PDR.</li> <li>• A contract for the product to be ordered must be in Panorama prior to creating the PDR.</li> <li>• A PDR cannot be created for a contract whose start date is in the future. The Contract Status must be 'Active' and the Contract State 'Landed'.</li> </ul>
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**Overview Steps:** Search> Click **Create a new PDR**> Add Product to PDR> Enter Requested Quantity> Submit> Confirm

1. Follow the **Product Delivery Request – Search** steps.
2. If the PDR is not in the system, click the **Create a new PDR** button.



3. The **Create New PDR** screen displays. Enter the PDR information.
  - Required:
    - Requestor: Select Bio Depot-HP (only option)
    - Contract#/PO#: Select the contract. The drop-down is populated with all contracts attached to the holding point.
    - Requestor Contact Name: Add your name in the free text field
    - Requestor Phone #: Add your contact phone number
    - Required Delivery Date: Select date using the calendar widget or fill in manually
    - Ship-to Address populates with the Bio Depot address
    - Bill-to Address populates with the Bio Depot address
  - Non-mandatory:
    - Supplier Name: Populates after the Contract#/PO# is selected.
    - Comments: There is no limit to the number of characters for a comment.

## Product Delivery Request

Create New PDR

\* Required Field

**Number:**

**PDR Cost:** \$0.00      **Supplier Name:** Merck Canada Inc.

**Status:** NA      **\* Contract#/PO#:** Contract01

**\* Requestor:** Bio Depot-HP      **Agreement Reference #:** 12

**\* Requestor Contact Name:** Jana Vickers      **Buyer:**

**\* Requestor Phone #:** ( 902 ) 481 5867 ext.      **Comments:**

**Requestor Fax #:** ( )      **Required Delivery Date:** 2017 / 10 / 16

yyyy mm dd

**\* Ship-to Address:** #5 - 7 Mellor Avenue, Burnside NS B3B0E8, Canada

Use Ad Hoc Address     

**Ad Hoc Ship To Address:**

**Ship-to Instructions:**

**\* Bill-to Address:** #5 - 7 Mellor Avenue, Burnside NS B3B0E8, Canada

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### PDR Item Summary View

(unsent)  
The system will remove all unchecked PDR items on save or submit.

**Row Actions:**

4. To add product(s) to the PDR, click the **Catalogue Item Search** button. The **Catalogue Item Search** screen displays.
5. Enter search criteria and click the **Search** button.
6. The system displays the results. Add one or more catalogue item(s) by selecting the checkbox next to the **Catalogue Item Code** and click the **Add Catalogue Item(s)** button.

### Catalogue Item Information

Search/Add Catalogue Item - Search Required Before Adding

**Catalogue Item Code:**

**Product Alternate ID:**

**Catalogue Item Status:** Active  
Discontinued  
Inactive

**Find Search String:**

**Level 1 - Category:**  **Add** **Edit**

**Level 2 - Product Group:**  **Add** **Edit**

**Level 3 - Generic Product Strength:**  **Add** **Edit**

**Level 4 - Generic Product Presentation:**  **Add** **Edit**

**Level 5 - Generic Product Package Size:**  **Add** **Edit**

**Level 6 - Trade Product:**  **Add** **Edit**

**Search** **Retrieve** **Clear**

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#### Search Results Returned

Your search criteria returned 1 result(s).

	Catalogue Item Code	Product Alternate ID	Catalogue Item Name	Catalogue Item Description	Catalogue Level	Current Catalogue Item Status
<input checked="" type="checkbox"/>	<a href="#">27</a>	HPV-4(10)	Gardasil®(10 x 0.5mL)MF	Human Papillomavirus quadrivalent	6	Active

**Add Catalogue Item(s)** **Return**

- 
 Multiple Catalogue Items may be added to the PDR, but only if they are supplied by the same supplier on the selected contract.

- After the catalogue items are added, Panorama displays the **Create New PDR** screen.
- Under the **PDR Item Summary View**, select the product line item and click the + symbol to expand the line item. It will view as -.

### PDR Item Summary View

(unsent)  
The system will remove all unchecked PDR items on save or submit.

Row Actions:

	Line Item Status	Product Alternate ID	Catalogue Item Name	Available Qty	Unit of Measure	Qty On Order	Qty Available to Order	Recommended Qty	Requested Qty	Requested Qty Unit of Measure	Unit Cost
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Draft	HPV-4(10)	Gardasil®(10 x 0.5mL)MF	Doses	2,020.0	91,560.0	2,090.0	200	Dose(s)	2.50

**Catalogue Item Code:** 27      **Catalogue Item Description:** Human Papillomavirus quadrivalent  
**Full Carton Qty:** 10.0      **Manufacturer Product Code:** -  
**Safety Stock Level:** 1.0      **Maximum Stock Level:** 12,500.0  
**Comments:**       **Cancel Reason:**

- Enter the **Requested Qty**, **Requested Qty Unit of Measure**, and **Unit Cost** for each product - click **Save**.
- The system will display a confirmation message. Click OK.

#5 - 7 Mellor Avenue, Burnside NS B3B0E6, Canada

Only selected PDR Items will be saved or submitted - unselected items will be removed. Do you wish to proceed?

#5 - 7 Mellor Avenue, Burnside NS B3B0E6, Canada

- The system posts a successful Save/Update message.

### Product Delivery Request

PDR saved/updated successfully.

- The PDR status is now Draft.
- Click the **Submit** button.
- After submitting, the PDR status changes to Pending Receipt.

### Create New PDR

\* Required Field

**Number:** 20      **Supplier Name:** Merck Canada Inc.  
**PDR Cost:** \$500.00      **\* Contract#/PO#:** Contract01  
**Status:** Pending Receipt

15. A copy of the PDR must be submitted to the supplier. Click the **Print** button at the bottom of the screen.

16. A PDF report that can be printed is generated.

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### Steps: Cancel Line Item

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If a product must be deleted after a PDR is created, a line item is cancelled.

**Overview Steps:** Search for the PDR> Select PDR line item> Select Cancel Reason> Click Cancel Line item>Confirm cancellation

1. Search for the PDR following the search process.
2. Select the line item, enter a **Cancel Reason**, then click the **Cancel Line Item** button.
  - **Note:** If all line items on a PDR are cancelled, the PDR itself be cancelled.

#### PDR Item Summary View

(unsent)

Row Actions:

	Line Item Status	Product Alternate ID	Catalogue Item Name	Available Qty	Unit of Measure	Qty On Order	Qty Available to Order	Recommended Qty	* Requested Qty	* Requested Qty Unit of Measure	* Unit Cost	E C	
⊖	<input checked="" type="checkbox"/>	Pending Receipt	HPV-4(10)	Gardasil®(10 x 0.5mL)MF	8,397.0	Doses	2,220.0	91,360.0	1,890.0	200	Dose(s) ▾	2.50	\$
<b>Catalogue Item Code:</b>		27		<b>Catalogue Item Description:</b>		Human Papillomavirus quadrivalent							
<b>Full Carton Qty:</b>		10.0		<b>Manufacturer Product Code:</b>		-							
<b>Safety Stock Level:</b>		1.0		<b>Maximum Stock Level:</b>		12,500.0							
<b>Comments:</b>		<input type="text"/>		<b>Cancel Reason:</b>		Duplicate request ▾							

3. A confirmation message displays, stating Line Item was successfully cancelled.

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### Steps: Cancel Product Delivery Request (PDR)

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**Overview Steps:** Search for PDR> Select PDR> Cancel Reason> Cancel PDR>Confirm cancellation

1. Search for the PDR following the search PDR process.
2. Select the PDR.

**PDR Item Summary View**

(unsent)

Row Actions:

	Line Item Status	Product Alternate ID	Catalogue Item Name	Available Qty	Unit of Measure	Qty On Order	Qty Available to Order	Recommended Qty	* Requested Qty	* Requested Qty Unit of Measure	* Unit Cost	E C
<input type="checkbox"/>	<input checked="" type="checkbox"/> Pending Receipt	HPV-4(10)	Gardasil®(10 x 0.5mL)MF	8,397.0	Doses	<a href="#">2,220.0</a>	91,360.0	1,890.0	<input type="text" value="200"/>	<input type="text" value="Dose(s)"/>	<input type="text" value="2.50"/>	\$

**Catalogue Item Code:** 27  
**Full Carton Qty:** 10.0  
**Safety Stock Level:** 1.0  
**Comments:**

**Catalogue Item Description:** Human Papillomavirus quadrivalent  
**Manufacturer Product Code:** -  
**Maximum Stock Level:** 12,500.0  
**Cancel Reason:**