

# Product Delivery Request (PDR) - Manage

Functions: <u>Search</u> <u>View Product Delivery Request</u> <u>Create Product Delivery Request</u> <u>Cancel Line Item</u> <u>Cancel PDR</u>

#### **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.

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

**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**.



Recent Work Inventory Replenishment	Catalogue Item Information	? 昌
Droduct Pequicitione	C Level 5	
- Product Delivery Request	Level 6	
Manage PDRs	Catalogue Item Search	
Receive Product		

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

Product Deliv	ery Request			? 昌
Product Delivery Re	quest (PDR) Search			
Specify PDR Search Crite	eria			
Product Trade Name:		PDR Number:	17	
Product Alternate ID:		Contract#/PO#:		
Catalogue Item Name:		Agreement Reference #:		
Catalogue Item Code:		Required Delivery Date:		
Supplier Name:		Supplier Short Name:	yyyy mm dd	
Supplier Code:		Holding Point:	Add Holdi	ing Point
PDR Status:	Cancelled Draft Partially Received Pending Receipt Received			
Override holding p	point security:			
			Search	trieve Clear

- 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.

PDR Results											
Select PDR Number or Submit Date link to edit PDR item order. Your search criteria returned 1 result(s). Create a new PDR											
PDR Number	PDR Submit Date	PDR Status	Holding Point	Supplier 🔻	Required Delivery Date						
<u>17</u>	<u>2017 Sep 19</u>	Pending Receipt	Bio Depot-HP	Merck Canada Inc.	2017 Sep 19						
Total: 1	Page 1 of 1				Jump to page:						

### 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.



PDI Selec Your	PDR Results         Select PDR Number or Submit Date link to edit PDR item order. Your search criteria returned 1 result(s).         Create a new PDR									
PDF	<u>R Number</u> 🔻	PDR Submit Date	PDR Status	Holding Point	<u>Supplier</u>	Required Delivery Date				
<u>17</u>		2017 Sep 19         Pending Receipt         Bio Depot-HP         Merck Canada Inc.         2017 Sep 19								
Tota	Total: 1 Jump to page:									

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

Product	Delive	ry Re	equest									? [
Edit PDR												
* Required Fiel	d											
Number:		17										
PDR Cost:		\$175.	00			Supplie	r Name:	Merck C	anada Inc.	0		
Status		Pendi	ng Receipt				* Contr	act#/PO#:	Contract	01	•	
* Requestor:		Bio [	Depot-HP		<b>•</b>		Agreem	ent Referer	1 <b>ce #:</b> 12			
* Requestor C	ontact Nam	test					Buyer:					
* Requestor P	hone #:	( 998	) 798	9879	ext 7		Comme	nts:				
Requestor For	#•	, 500										1
Vequesion Lay	π.	(	)			_						
* Required Delivery Date: 2017 / 09 / 19												
			уууу	mm	dd							
* Ship-to Addr	ess:		#5 - 7 Mel	llor Aven	ue, Burn	iside NS B3	B0E8, Ca	anada	٢			
			🗌 Use Ad	d Hoc Ad	ddress	Generate	Ad Hoc	Address				
Ad Hoc Ship T	o Address:											
Ship-to Instruc	tions:											
* Bill-to Addre	ss:		#5 - 7 Mel	llor Aven	ue, Burn	side NS B3	B0E8, Ca	anada	0			
PDR Item	Summa	ry Viev	v									
Row Actions:	Cancel L	ine Item								Ca	talogue Item S	earch
Li Ite Si	ne Pro em Alte tatus ID	duct C ernate N	atalogue Iten ame	n Av Qt	vailable ly	Unit of Measure	Qty On Order	Qty Available to Order	Recommended Qty	* Requested Qty	* Requested Qty Unit of Measure	* Unit Cost
🕀 🔽 Pe	ending Pne eceipt P-23	eu- P 3(10) x	neumovax®23 0.5mL)MF	3(10 94	9.0	Doses	1,000.0	1,500.0	10,560.0	0	Dose(s) 💌	0.00
🕀 🔽 Pe	ending HP	/-4(10) G	ardasil®(10 x 5mL)MF	8,3	397.0	Doses	<u>2,020.0</u>	91,570.0	2,090.0	10	Dose(s) -	2.50
										View Hist	ory Submit	Save

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

## Steps: Create Product Delivery Request (PDR)



	Pre-requisites
×	• A supplier of the PDR product must be in Panorama, prior to creating the PDR.
	<ul> <li>A contract for the product to be ordered must be in Panorama prior to creating the PDR.</li> </ul>
	• 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'.

**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.

PDR Results									
Select PDR Number or Submit Date link to edit PDR item order. Your search criteria returned 0 results, please modify your criteria and search again.									
PDR Number	PDR Submit Date	PDR Status	Holding Point	Supplier	Required Delivery Date				
Total: 0	M Sege 1 of 1				Jump to page:				

- 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.
    - o 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
    - o Bill-to Address populates with the Bio Depot address
  - Non-mandatory:
    - Supplier Name: Populates after the Contract#/PO# is selected.
    - o Comments: There is no limit to the number of characters for a comment.



Product Delivery	/ Re	quest					0 🗉
Create New PDR							
*Required Field							
Number: PDR Cost: Status * Requestor: * Requestor Contact Name: * Requestor Phone #:	\$0.00 NA Bio Do Jana V ( 902	epot-HP /ickers ) 481	5867	≎ ext.	Supplier Name: * Contract#/PO#: Agreement Reference #: Buyer: Comments:	Merck Canada In Contract01 12	IC.
Requestor Fax #:	(	)					li.
* Required Delivery Date: * Ship-to Address:		2017 уууу #5 - 7 M	/ 10 mm ellor Ave	/ 16 dd nue, Burn	ide NS B3B0E8, Canada	0	
Ad Hoc Ship To Address: Ship-to Instructions: * Bill-to Address: PDR Item Summary	View	#5 - 7 M	ellor Ave	nue, Burn	side NS B3B0E8, Canada	3	
(unsent) The system will remove all unc	hecked I	PDR items	on save	or submit			
Row Actions: Cancel Line	ltem						Catalogue Item Search

- 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.
- 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	n Informatio	n								? =
Catalogue Item Search										
Search/Add Catalogue Item Catalogue Item Code:	- Search Required Be	fore Add	ing	Pro	duct Alternate ID:	HPV-4(	10)			
Catalogue Item Status:	Active Discontinued Inactive			Find	l Search String:		,			
Level 1 - Category:		Add	Edit						٥	
Level 2 - Product Group:		Add	Edit						0	
Level 3 - Generic Product	Strength:	Add	Edit						٥	
Level 4 - Generic Product	Presentation:	Add	Edit						٥	
Level 5 - Generic Product	Package Size:	Add	Edit						0	
Level 6 - Trade Product:		Add	Edit						0	
								Se	earch Retrieve	Clear
Search Results Re	eturned									
Your search criteria returned Select All Deselect A	l 1 result(s). I									
Catalogue Item Code	Product Alternate ID	Catalo Name	gue Item	<b>^</b>	Catalogue Item Description	•	<u>Catalogue</u> <u>Level</u>	•	Current Catalogu Status	e Item 🔻
✓ 27	HPV-4(10)	Gardas 0.5mL)	sil®(10 x MF		Human Papillomavir quadrivalent	us	6	A	Active	
								Add C	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.

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



unser The sy	nt) /stem	will remo	ve all unche	cked PDR items	s on save or	submit.						
Line         Product         Catalogue         Available         Unit of         Qty         Qty         Recommended         * Requested         * Unit of         Cost           Status         ID         Item Name         Qty         Measure         On         Available         Qty         Recommended         Requested         Qty         Unit of         Cost         Cost										tem Search * Unit Cost		
Θ		Draft	HPV-4(10)	Gardasil®(10 x 0.5mL)MF	8,397.0	Doses	<u>2,020.0</u>	91,560.0	2,090.0	200	Dose(s) ᅌ	2.50
Cata Full Safe Com	logue Cartor ty Sto ments	ltem Co n Qty: ock Level s:	de: :	27 10.0 1.0			Cata Man Max Can	llogue Iten ufacturer I imum Stoc cel Reasor	n Description: Product Code: :k Level: 1:	Human - 12,500	Papillomavirus o	quadrivalent
										Vie	w History Su	bmit Sav

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

Only selected PDR Items will be saved or submitted - unselected items will be	e removed. Do you wish to proceed?
#5 - 7 Mellor Avenue, Burnside NS B3B0E8, Canada	Cancel OK

11. The system posts a successful Save/Update message.

Product D	elivery Req	uest	?	Ē
PDR saved/updated	successfully.			

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

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



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

View History	Submit	Save
Cancel PDR	Cancel	Print

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

#### Steps: Cancel Line Item

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.

PDF	R Iter	m Sum	mary V	iew									
(unsei	nt)			-									
Row	Actio	ns: Cano	cel Line Ite	m							Catalogue I	tem Searc	h
		Line Item Status	Product Alternate ID	Catalogue Item Name	Available Qty	Unit of Measure	Qty On Order	Qty Available to Order	Recommended e Qty	* Requested Qty	* Requested Qty Unit of Measure	* Unit Cost	C
Θ		Pending Receipt	HPV-4(10)	Gardasil®(10 x 0.5mL)MF	8,397.0	Doses	<u>2,220.0</u>	91,360.0	1,890.0	200	Dose(s) -	2.50	\$
Cata Full	logue Carto	Item Cod n Qty:	e: 2	7 0.0			Catal Manu	ogue Item facturer F	n Description: Product Code:	Human F -	Papillomavirus o	luadrivalen	t
Safe Com	ty Sto ments	ck Level: s:	1	.0			Maxir Cance	num Stoc el Reason	k Level: n:	12,500.0 Duplica	ate request	¢	
										Viev	v History Su ncel PDR Ca	bmit Sa ancel Pr	ive

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

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

**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.



Row	Actio	ns: Can	cel Line Ite	m							Catalogue I	tem Searc
		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
Θ		Pending Receipt	HPV-4(10)	Gardasil®(10 x 0.5mL)MF	8,397.0	Doses	<u>2,220.0</u>	91,360.0	1,890.0	200	Dose(s) -	2.50
Catalogue Item Code: Full Carton Qty: Safety Stock Level: Comments:		e: 2 1 1	7 0.0 .0		Catalogue Item Description: Manufacturer Product Code: Maximum Stock Level: Cancel Reason:				Human F - 12,500.0 Duplica	Human Papillomavirus quadrivalent - 12,500.0 Duplicate request		