

Product Lot – Zone Role

Functions:

- [Search Product Lots](#)
- [View a Product Lot](#)

Business context

Vaccine manufacturers assign product lot numbers to all products. Product Lot information, which includes the lot number and the expiry date of the product, is associated with each lot controlled catalogue item (i.e., all vaccines). While completing requisitions, users may need to search for and view Product Lots. When adding product to the Catalogue, new Product Lots may need to be added, or information updated.

- Product Lot information, which includes the lot number and the expiry date of the product, is associated with each Panorama lot controlled catalogue item (i.e., all vaccines)
- Lot information is used in inventory management processes to support product distribution, track products, manage product that has been exposed to an adverse storage condition (ASC), and manage product recalls

Triggers

- A user needs to verify if a product lot is in Panorama.
- A user needs to view detailed information about a product lot.
- A new product lot is available and must be added to the catalogue (Bio Depot only).
- A product lot must be updated (Bio Depot only).
- The Bio Depot needs to create a cold chain subplot for product that can be used following an Adverse Storage Condition (ASC) event.

Business Roles


- The Product Lot Search process will be performed by the Zone Biological Coordinators, the Bio Depot Biological Coordinator, and Admin support staff.
- The Add Product Lot and Update Product Lot processes will be completed by the Bio Depot Biological Coordinator or the Admin support at the Bio Depot.

Panorama Role

- The Search and View Product Lot processes requires either the Inventory Zone or Inventory Provincial role.
- Permissions for Add and Update Product Lots are restricted to users with the Inventory Provincial role.

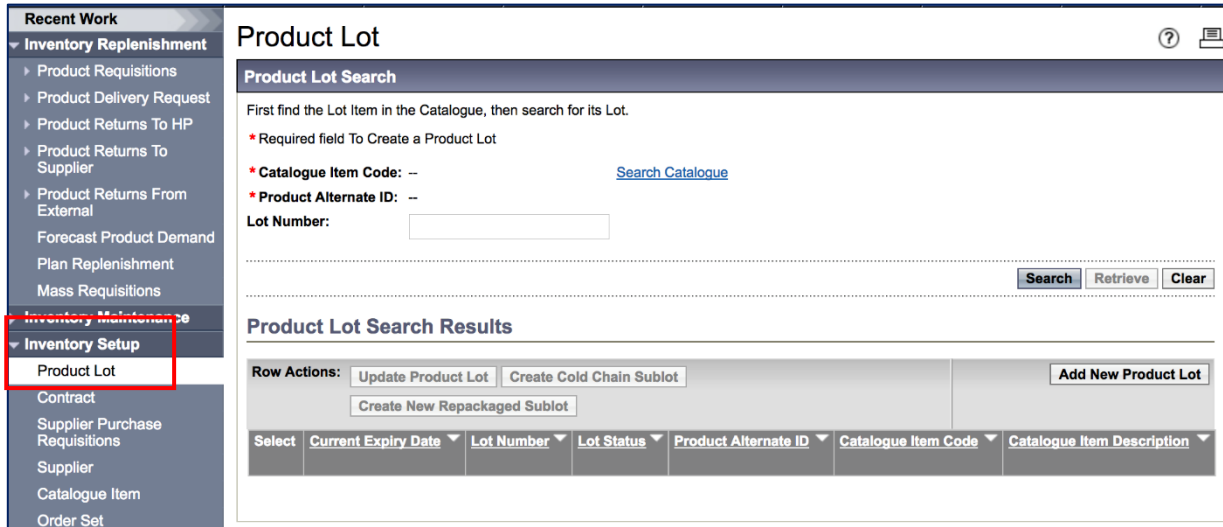
Product Lot Status	Definition
Active	<ul style="list-style-type: none"> Lot is in use and available for all inventory transactions. 'Active' is a status that can be selected when creating/updating a lot.
Inactive	<ul style="list-style-type: none"> Lot is not in use. No inventory replenishment transactions allowed. In other jurisdictions, 'Inactive' is used for Lots that have been created in error, duplicates, etc. 'Inactive' is a status that can be selected when creating/updating a lot.
Expired	<ul style="list-style-type: none"> Panorama will automatically change the Lot Status to 'Expired' at 00:01 on the day following the expiry date. Expired lots are not available for inventory transactions, unless user has permission to "Assign Expired Lots". Both Inventory roles have this permission.
Recalled	<ul style="list-style-type: none"> When a product is recalled via the Recall function, the system will change the Lot Status to 'Recalled'. The system will display "RCL" appended to the [Lot Number] / [Expiry Date] whenever the lot is displayed.
Shortened	<ul style="list-style-type: none"> When the manufacturer shortens the date of a product lot, a user can update the Current Expiry Date. When the Current Expiry Date is updated to be a date that is between the current date and a date that is less than or equal to current date + the number of days in the Short Date Period, the system will automatically change the Lot Status to 'Shortened'. The System will display "SHR" appended to the Expiry Date whenever the lot is displayed (view on screen, or printed on form or list, or equivalent).
Extended	<ul style="list-style-type: none"> When the manufacturer extends the date of the product lot, a user can update the Current Expiry Date. When the Current Expiry Date is updated to be a date beyond the Original Expiry Date, the System will change the Lot Status to 'Extended'. The System will display "EXT" appended to the [Expiry Date] whenever the Lot is displayed (view on screen, or printed on form or list or equivalent).

Steps: Search for a Product Lot

	<ul style="list-style-type: none"> Complete a Product Lot search to avoid creating a duplicate record. Search can be done by searching for a known Product Lot Number or by searching the catalogue for the product.
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Overview Steps: Click **Product Lot** on Left Menu>Enter Search criteria>Click Search

1. Select **Inventory Setup** from the Left Menu, then select the **Product Lot** link.



Recent Work

- Inventory Replenishment
 - Product Requisitions
 - Product Delivery Request
 - Product Returns To HP
 - Product Returns To Supplier
 - Product Returns From External
 - Forecast Product Demand
 - Plan Replenishment
 - Mass Requisitions
- Inventory Maintenance
 - Inventory Setup**
 - Product Lot**
 - Contract
 - Supplier Purchase Requisitions
 - Supplier
 - Catalogue Item
 - Order Set

Product Lot

Product Lot Search

First find the Lot Item in the Catalogue, then search for its Lot.

* Required field To Create a Product Lot

* Catalogue Item Code: -- [Search Catalogue](#)

* Product Alternate ID: --

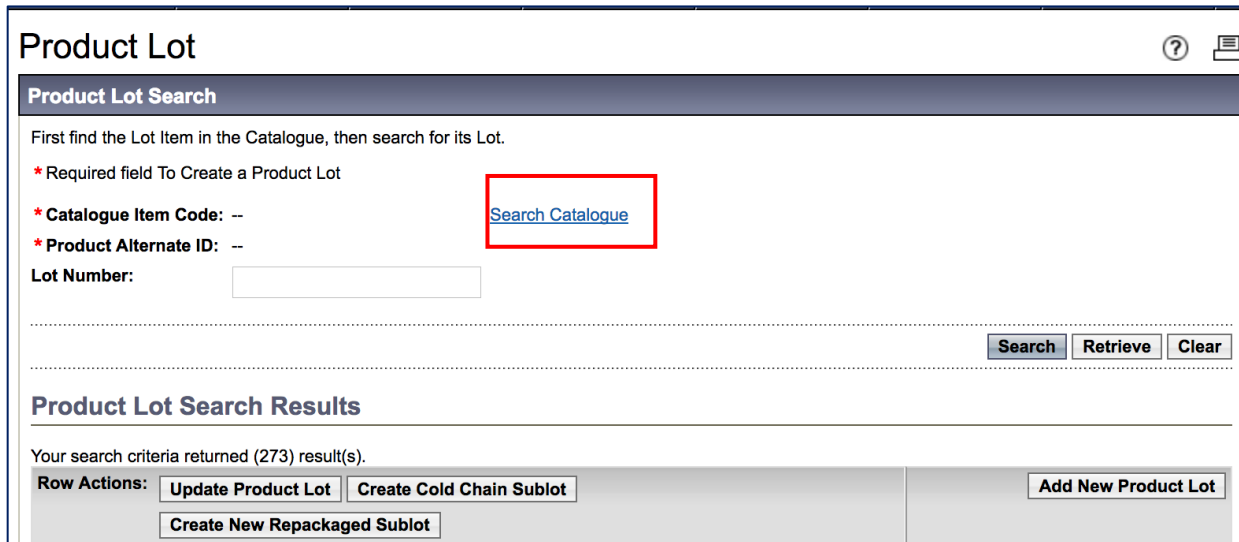
Lot Number:

Product Lot Search Results

Row Actions:

Select	Current Expiry Date	Lot Number	Lot Status	Product Alternate ID	Catalogue Item Code	Catalogue Item Description
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- The **Product Lot Search** screen displays.
 - A search without criteria will generate all product lots in Panorama.
- To search for a product lot using the catalogue, click the **Search Catalogue** hyperlink.



Product Lot

Product Lot Search

First find the Lot Item in the Catalogue, then search for its Lot.

* Required field To Create a Product Lot

* Catalogue Item Code: -- [Search Catalogue](#)

* Product Alternate ID: --

Lot Number:

Product Lot Search Results

Your search criteria returned (273) result(s).

Row Actions:

Select	Current Expiry Date	Lot Number	Lot Status	Product Alternate ID	Catalogue Item Code	Catalogue Item Description
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- The **Catalogue Item Search** screen displays. Enter the **Product Alternate ID**, a term in the Find Search String (e.g., Hepatitis) or select values in the Level 1 to Level 6 drop lists to filter your search. Note that the **Product Alternate ID** field has type-ahead functionality built in.

Catalogue Item Information

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:

Level 6 - Trade Product:

- The search results display. Select the product lot checkbox and click the **Add Catalogue Item(s)** button.

Search Results Returned

Your search criteria returned 2 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"/>	53	MMR(10)	MMR™ II(10 x 0.5mL)MF	Measles; Mumps; Rubella	6	Active
<input type="checkbox"/>	54	MMR(10)	Priorix™ (10 x 0.5mL)GSK	Measles; Mumps; Rubella	6	Active

- The **Product Lot Search** screen displays. The Catalogue Item Code and Product Alternate ID fields have been populated. Click the **Search** button.

Product Lot

Product Lot Search

First find the Lot Item in the Catalogue, then search for its Lot.

* Required field To Create a Product Lot

* **Catalogue Item Code:** 53 [Search Catalogue](#)


* **Product Alternate ID:** MMR(10)

Lot Number:

Product Lot Search Results

- The results display under **Product Lot Search Results**. Each set of product lots display in ascending year order, depending on Lot Status, e.g., Active or Expired.

Product Lot Search Results						
Your search criteria returned (273) result(s).						
Row Actions: <input type="button" value="Update Product Lot"/> <input type="button" value="Create Cold Chain Sublot"/> <input type="button" value="Create New Repackaged Sublot"/>						<input type="button" value="Add New Product Lot"/>
Select	Current Expiry Date	Lot Number	Lot Status	Product Alternate ID	Catalogue Item Code	Catalogue Item Description
<input type="checkbox"/>	2021 Jan 29	0154Y	Active	MMR(10)	53	Measles; Mumps; Rubella
<input type="checkbox"/>	2016 Mar 31	145001A	Expired	Men-B(1)	47	Meningococcal B
<input type="checkbox"/>	2017 Feb 28	152001B	Expired	Men-B(1)	47	Meningococcal B
<input type="checkbox"/>	2017 Jun 30	154901C	Expired	Men-B(1)	47	Meningococcal B

	<ul style="list-style-type: none"> Wildcard characters % can be used when searching for Lot Numbers. For example, A% can be used to find all lot numbers that begin with A. Add the wildcard characters in the Lot Number field.
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- Another option is to search by Product Lot Number. On the **Product Lot Search** page, enter the **Lot Number** in the **Lot Number** field – see screenshot on Step #6.
 - A wildcard search can also be completed if you only know the first letter.

Product Lot Search	
First find the Lot Item in the Catalogue, then search for its Lot.	
* Required field To Create a Product Lot	
* Catalogue Item Code: 53	Search Catalogue
* Product Alternate ID: MMR(10)	
Lot Number:	<input style="border: 2px solid red;" type="text" value="J%"/>
<input type="button" value="Search"/> <input type="button" value="Retrieve"/> <input type="button" value="Clear"/>	

- Click the **Search** button.

Steps: View a Product Lot

Overview Steps: Search>Click Lot Number hyperlink>View Lot Number

- Search for a Product Lot, following the search process.
- Click on the blue Lot Number hyperlink.

Select	Current Expiry Date	Lot Number	Lot Status	Product Alternate ID	Catalogue Item Code	Catalogue Item Description
<input checked="" type="checkbox"/>	2021 Jan 29	0154Y	Active	MMR(10)	48	Measles; Mumps; Rubella

- The **View Product Lot Details** screen displays. View the information.

Maintain Product Lot

View Product Lot Details

Lot Type:	New-Lot	Product Trade Name:	MMR` II
Lot Number:	0154Y	Product Alternate ID:	MMR(10)
Original Expiry Date:	2021 Jan 29	Catalogue Item Name:	MMR` II(10 x 0.5mL)MF
Current Expiry Date:	2021 Jan 29	Catalogue Item Code:	48
Lot Status:	Active	Manufacturer Code:	Merck Frosst
		GTIN:	-
		DIN:	-

Comment: (4000 characters remaining)

Add

Date	Comments	Recorded By

Close **Print Lot Details**

4. To print the product lot details, click the **Print Lot Details** Button.
5. Click the **Close** button.