Pharmacy Information System (PhIS)
and
Clinic Pharmacy System (CPS)

User Manual
Pharmacy Inventory – Procurement (Quotation)

Version	**: 4th Edition**
Document ID	**: U.MANUAL_INV_PROCUREMENT_STANDARD_QUOTATION**

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1.0 Introduction

1.1 Overview of PhIS

Pharmacy Information System or better known as PhIS is a complete and comprehensive system that integrates pharmacy related services that geared toward pharmacy excellence care. This implementation would transform most of the current manual process to electronic system would benefit facility end user in the health care sector.

There are twelve (12) modules to assist service delivery by the health care sector which comprises of:

1. Order Management
2. Inpatient Pharmacy
3. Outpatient Pharmacy
4. Medication Counselling
5. Ward Pharmacy
6. Pharmacy Inventory
7. Manufacturing of Cytotoxic Drug Reconstitution(CDR), Parenteral Nutrition, IV Admixture & Eye Drop, Radiopharmaceuticals and Extemporaneous
8. Adverse Drug Reaction & Drug Allergic Card (ADR & DAC)
9. Clinical Pharmacokinetics Services (TDM)
10. Drug Information & Consumer Education (DICE)
11. Medication Therapy Adherence Clinic (MTAC)
12. Data Mining (PhARM)

1.2 Purpose and Objectives

This user manual outlines the Pharmacy Inventory (Request for Quotation) sub-module and its key features and functionalities. The primary objective is to guide users through the process of completing PhIS application process.

User will understand the following activities in details:

- Quotation

1.3 Organised Sections

These are the sections within this document:

- Section 1 : Introduction
- Section 2 : Application Standard Features
- Section 3 : Quotation
- Section 4 : Acronyms

2.0 Application Standard Features

2.1 PhIS Legend

Standard Legend			
LOGIN	Login to PhIS	Logout	Logout from PhIS
Change Password	Change Login Password		Reset Login Screen
	Expand Menu		Collapse Menu
Home	Display Home Tab		Expand Module
	Collapse Module		Close All Open Tabs
	Refresh Screen	Search	Search Record
	Add/Create New Record		Show Help
	Print	*	Mandatory Field
	Calendar Icon		Search Icon
	Close Window		Radio Button
	Checkbox		Edit Record
	Cancel		Delete Record
	Save	Export to Excel	Export and Open Report in Excel Format
Add Item	Add Item to the list	Delete	Delete Item from the list
Request	Request for Approval	Cancel Request	Cancel the Request
Approve	Approve Transaction	Reject	Reject Transaction
Send for Approval	Send for Approval		Dropdown Box
	Automatically Display/Retrieve Box		Empty Text Box

Quotation Module Legend			
	Print	Edit	Edit Record
	Edit Record	Delete	Delete
Search	Search	Send for Verification	Send For Verification
Send for Approval	Send For Approval	Verify	Verify
Reject	Reject	Approve	Approve
Confirm	Confirm	Add Item	Add Item
Vote Code	Add Vote Code	Vote Details	Add New vote Code
Add Facility	Add Facility	Add Additional Item	Add Additional Item
Generate EPO	Generate EPO	Generate RPL	Generate RPL

Note

- *To learn more about Login Information, kindly click Login Information Modules for descriptive step.*

3.0 Quotation

Overview

Quotation system will be used to generate Quotation No. to be proceed with LP Purchase Order transaction. There are 2 Quotation Type; from RFQ or to be transcribed from eP.

User Group

This module is intended for Pharmacist and Assistant Pharmacist (subject to user assign by the facility).

Functional Diagram

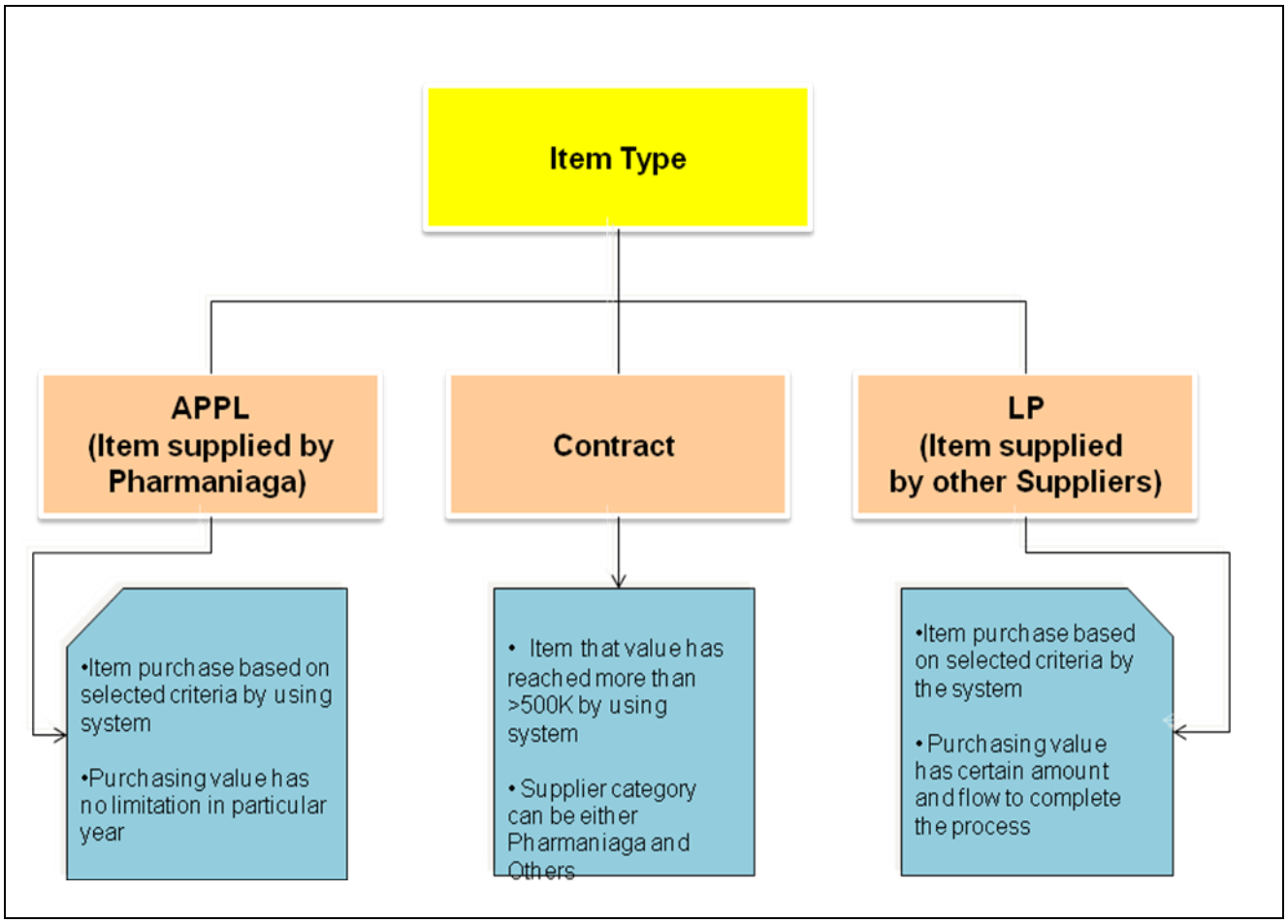

Figure 3.0-1

Functional Description

Quotation comprises of two (2) functions:

- **Quotation (LP)**
  - Create New Quotation: Request For Quotation (RFQ)
  - Create New Quotation: eP

3.1 Quotation (LP)

3.1.1 Quotation Listing Page

This function is used to search Recommended Purchase List (RPL) and Supplementary Order transaction of Request for Quotation record.

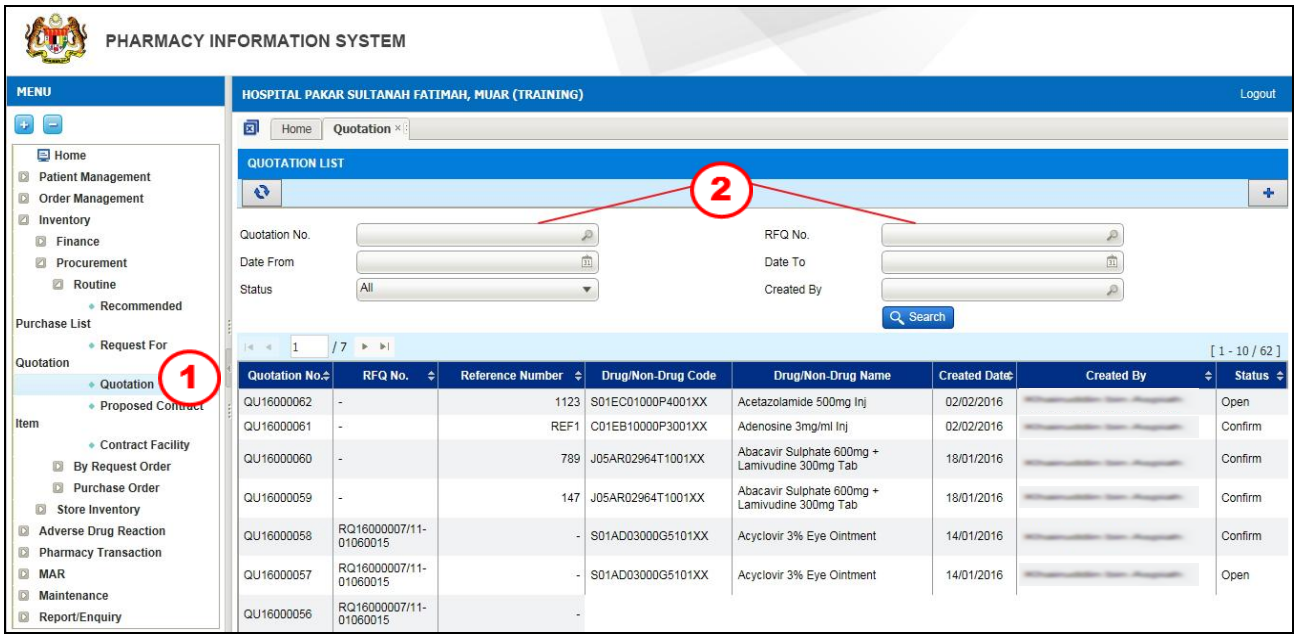

Figure 3.1.1-1 Quotation

STEP 1

Click on the 'Inventory' menu followed by 'Procurement and Routine', and select 'Quotation'

STEP 2

To search for existing Quotation, you may search by criteria as follow:

No	Field	Description	Remarks
a	Quotation No	Quotation Number	Display all existing Quotation number
b	RFQ No	RFQ (Request for quotation) Number	Display all existing RFQ number
c	Date From	Start date for the Quotation transaction	Format field (dd/mm/yy)
d	Date To	End date for the Quotation transaction	Format field (dd/mm/yy)
e	Status	Search by: - All - Cancelled - Confirmed - Open	Able to filter and search record(s)
f	Created By	User Name	Display the name of the person made the transaction

Table 3.1.1-1

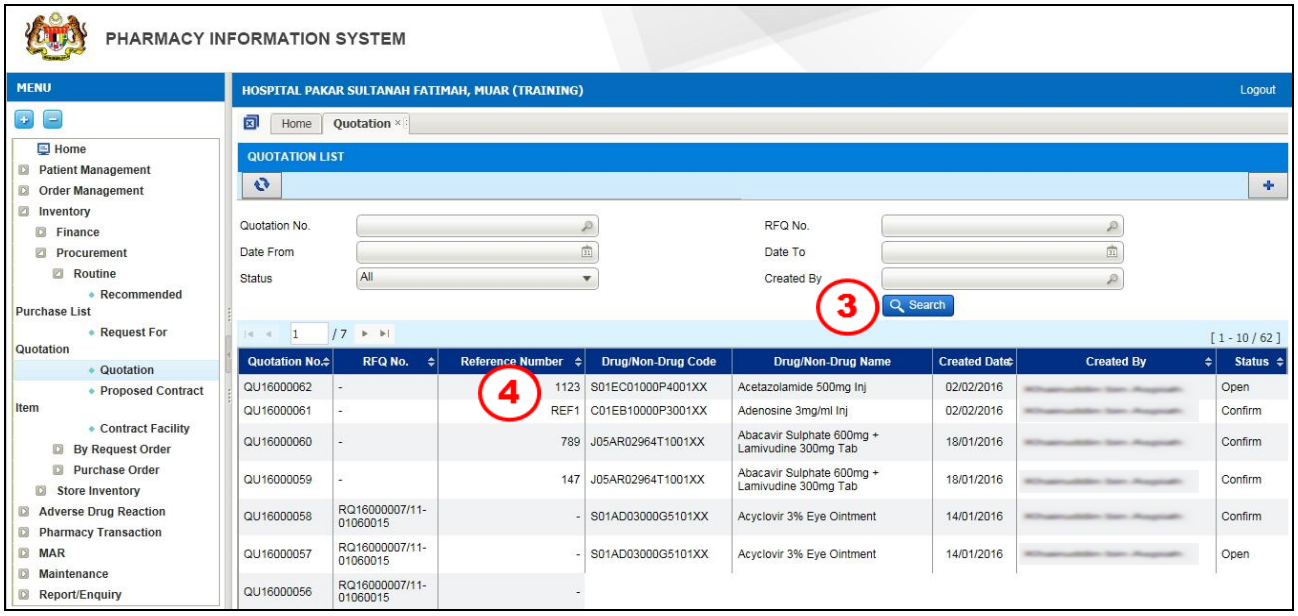

Figure 3.1.1-2 Request For Quotation

STEP 3

Click on the Search button after input criteria and the result display will be based on the entered criteria

Note

In circumstances of no criteria is input, the entire list of transaction will be displayed.

STEP 4

Double click on the selected record and the details will be displayed

Note

Latest transaction based on the latest date and placed at the top.

3.1.2 Create Quotation: Request For Quotation

To create new record for Quotation, perform steps below:

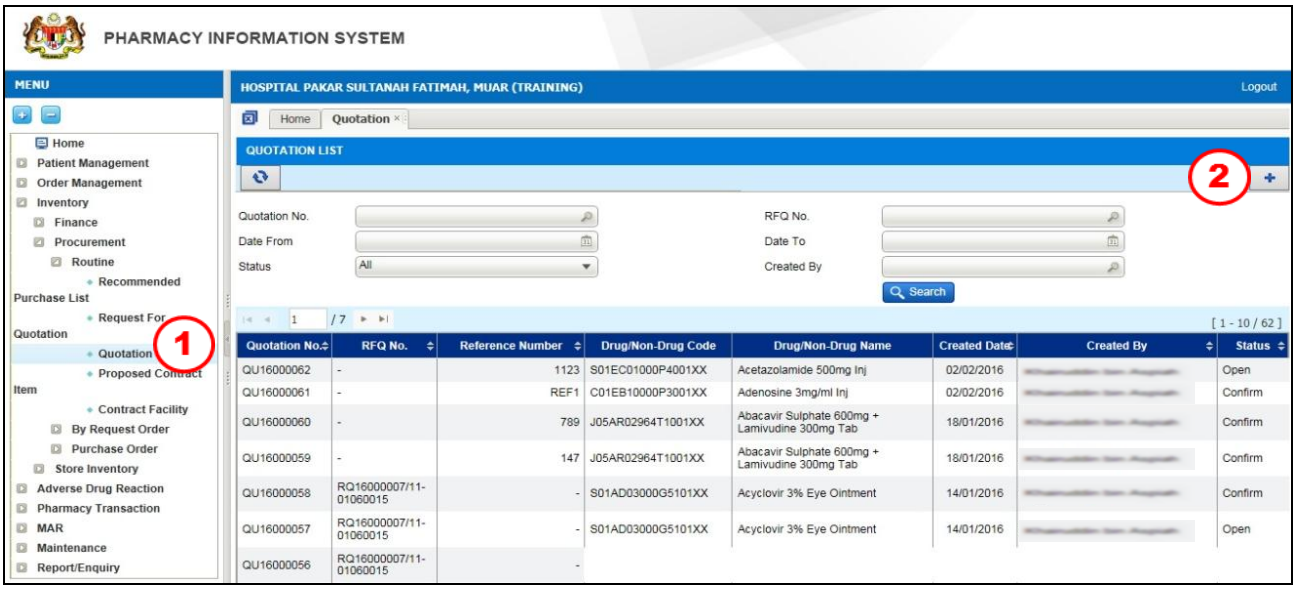

Figure 3.1.2-1 Quotation List

STEP 1

Click on 'Inventory' menu followed by 'Procurement' and 'Routine', and select 'Quotation'

STEP 2

Click on the button and screen as per Figure 3.1.2-2 will be displayed

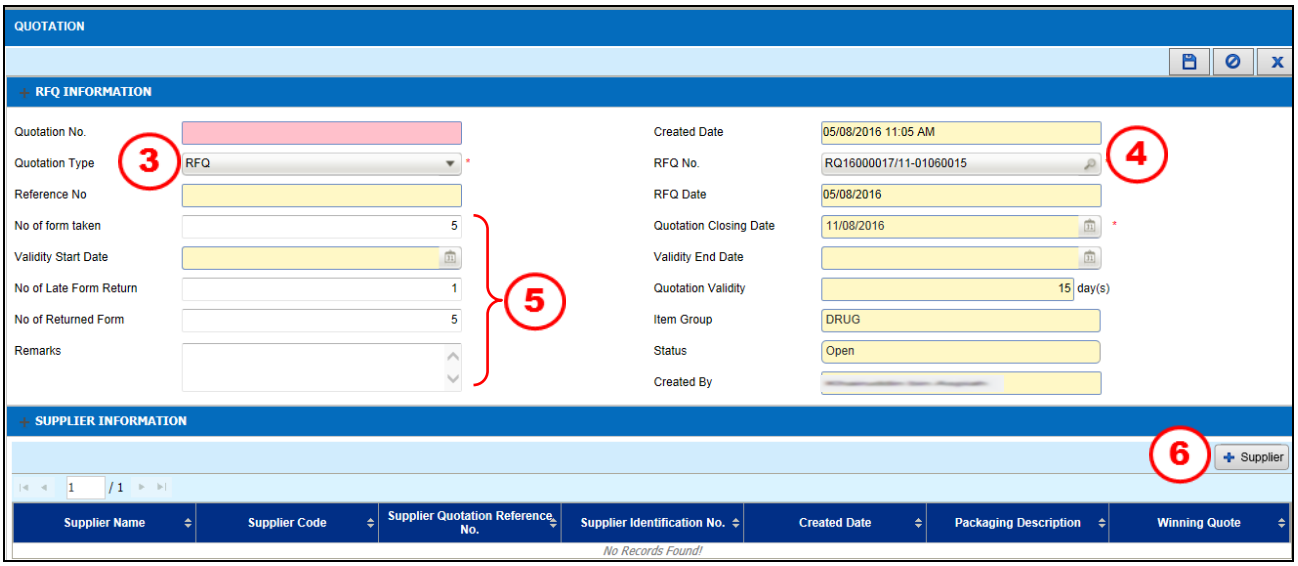

Figure 3.1.2-2 Quotation (RFQ Information)

STEP 3

Select ***Quotation Type*** as RFQ

STEP 4

Click on the to search for ***RFQ No***

<u>Note</u>

RFQ Date, Quotation Closing Date, Quotation Validity and ***Item Group*** will be auto displayed base on information from RFQ No. Selected.

STEP 5
Insert ***No of form taken, No of Late Form Return, No of Returned Form*** and ***Remarks*** (if any).

STEP 6
Click on the [+ Supplier] button to add supplier details

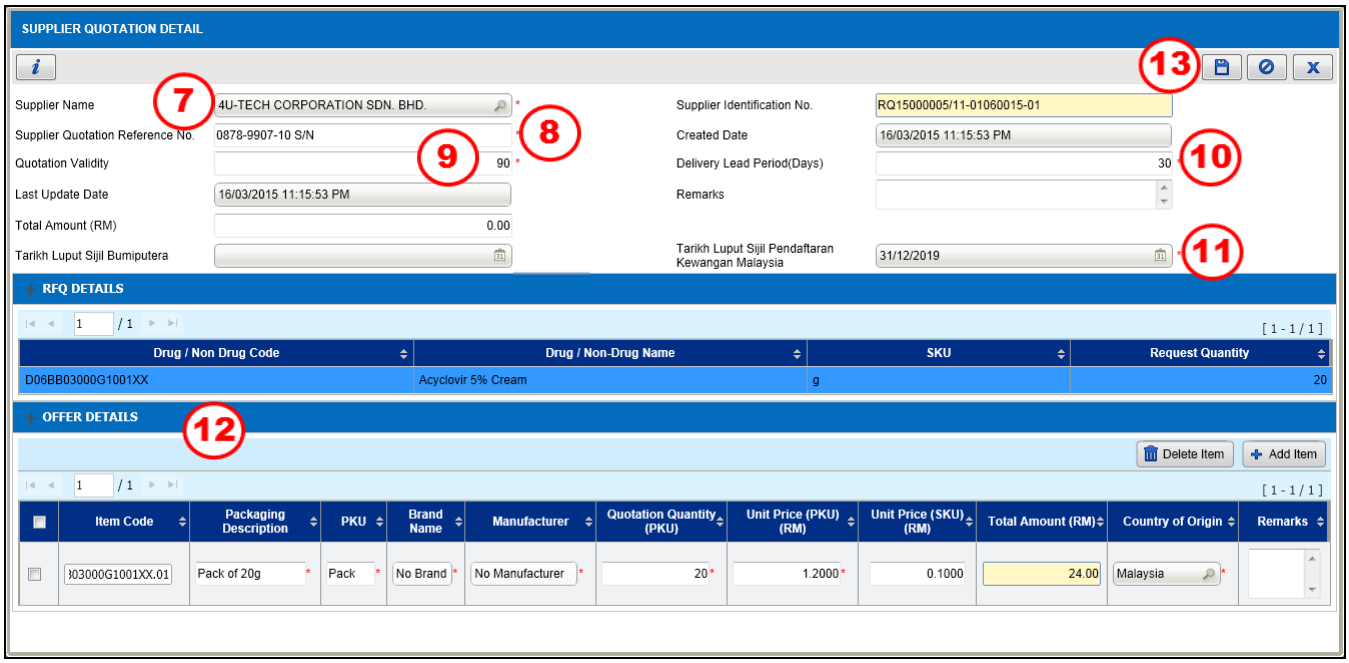

Figure 3.1.2-3 Supplier Quotation Detail

STEP 7
Click on the [🔍] to search for ***Supplier Name***

STEP 8
Enter ***Supplier Quotation Reference No.***

STEP 9
Enter ***Quotation Validity***

STEP 10
Enter ***Delivery Lead Period (Days)***

STEP 11
Select ***Tarikh Luput Sijil Bumiputera*** and ***Tarikh Luput Sijil Pendaftaran Kewangan Malaysia***

STEP 12
Enter this following fields under the 'Order Details' section:

- Item Code
- Packaging Description
- PKU
- Brand Name
- Manufacturer
- Quotation Quantity (PKU)
- Unit Price (PKU)(RM)
- Unit Price (SKU)(RM)
- Country of Origin
- Remarks

STEP 13

Click on the button to save the transaction

Note

- *An alert message will be displayed as shown in Figure 3.1.2-4 and Figure 3.1.2-5*

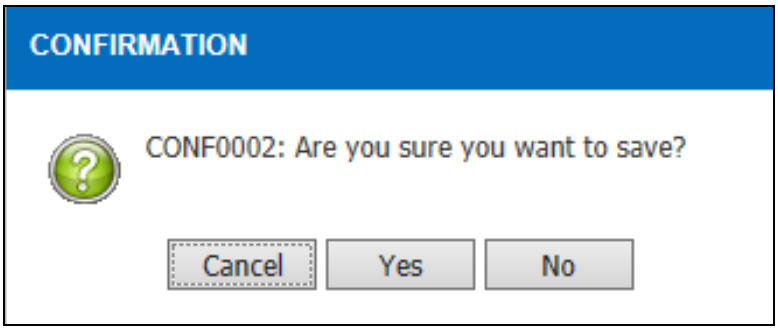

Figure 3.1.2-4 Confirmation Alert Messages

- *If click on the* Yes *button, record will be saved and appeared at Offer Details.*
- *If click on the* No *button, record will not be saved and proceed to Offer Details.*

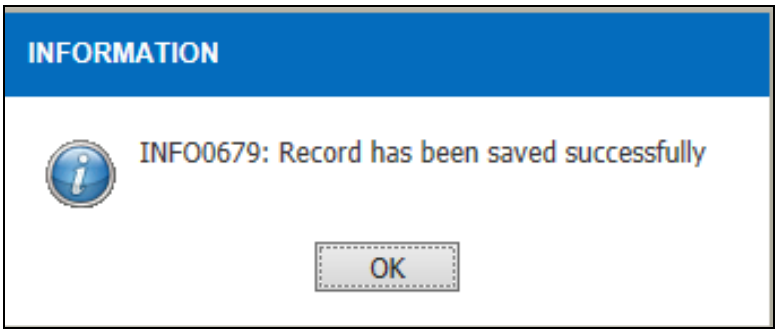

Figure 3.1.2-5 Information Alert Messages

- *Click on the* OK *button, record will be successfully saved and updated.*

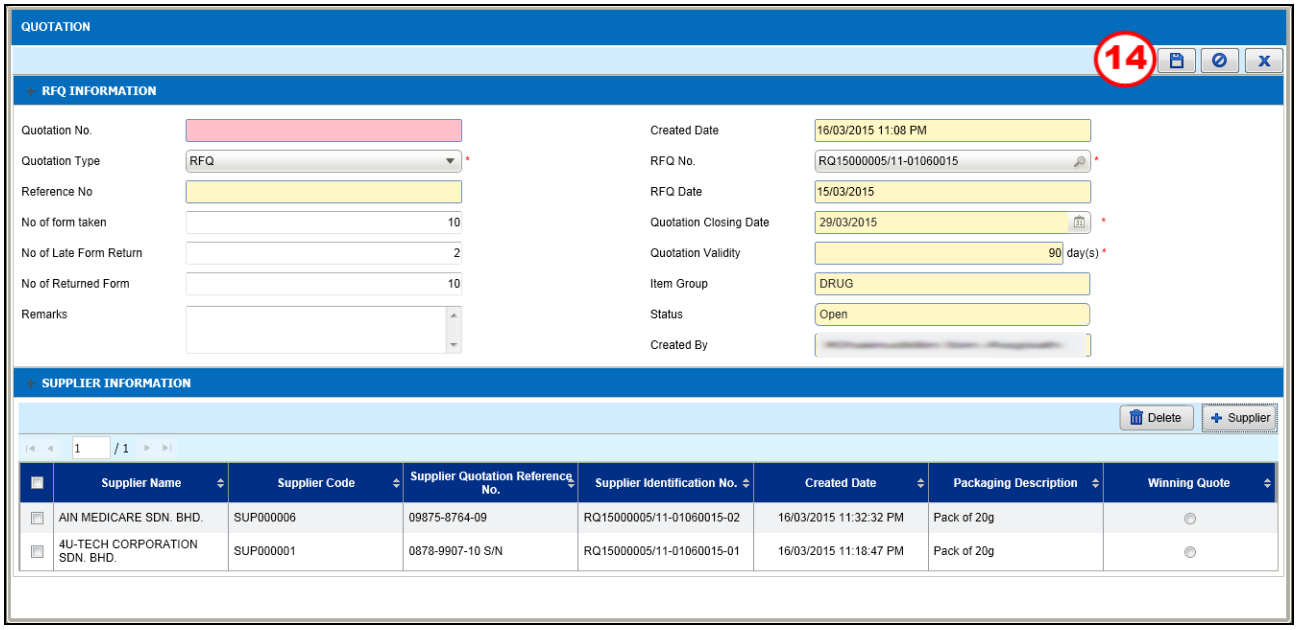

Figure 3.1.2-6 Supplier Quotation Detail

STEP 14

Click on the button to save the transaction

Note

Winning supplier information updated to proceed in Purchase Order transaction.

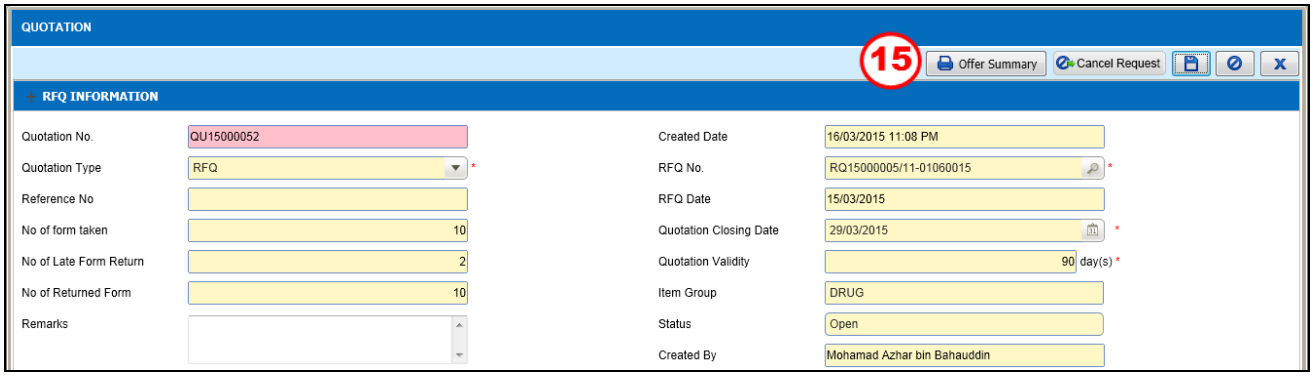

Figure 3.1.2-7 Supplier Quotation Detail

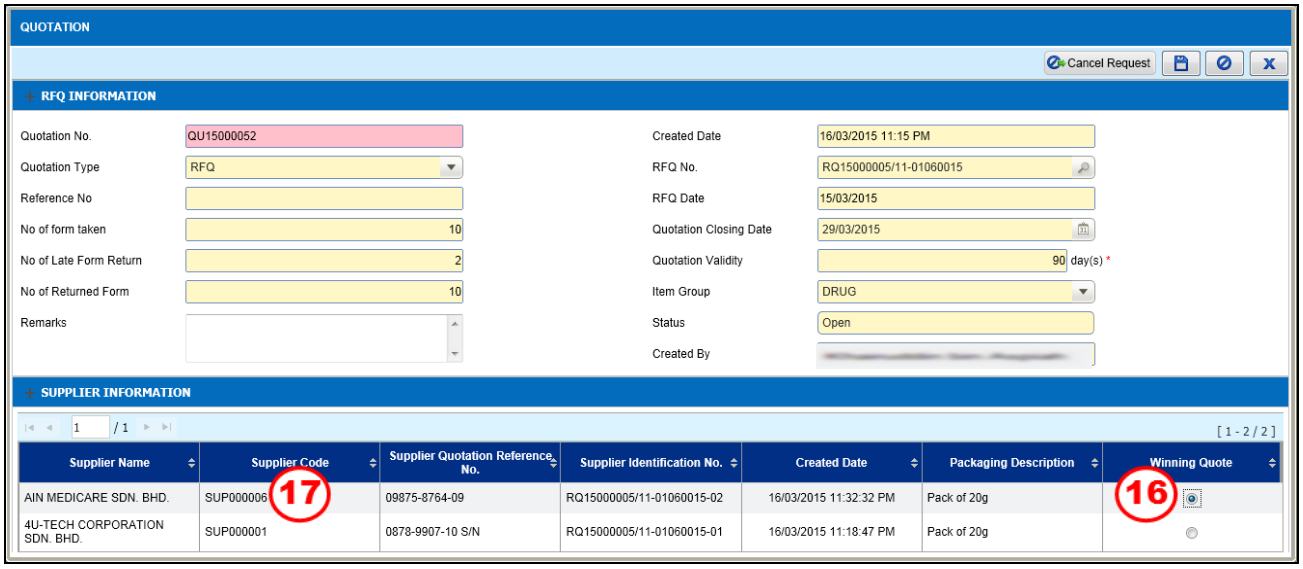

Figure 3.1.2-8 Supplier Quotation Detail

STEP 15
Click on the '***Offer Summary'*** button

Note

- *Facility will generate the 'Offer Summary' form before quotation committee decides the winning supplier.*
- *Committee will decide the winning supplier for the quotation during the committee meeting.*
- *Remarks for 'Offer Summary'*
  - *a) Click on the* Offer Summary *button.*
  - *b) Committee will meet to decide who will be chosen as supplier.*
  - *c) Select winning quotation in the system.*

STEP 16
Click on the button to choose the winning quotation based on the decision made in the committee meeting

STEP 17
Double click on the '***Winning Quote***' information to enter the winning quotation details

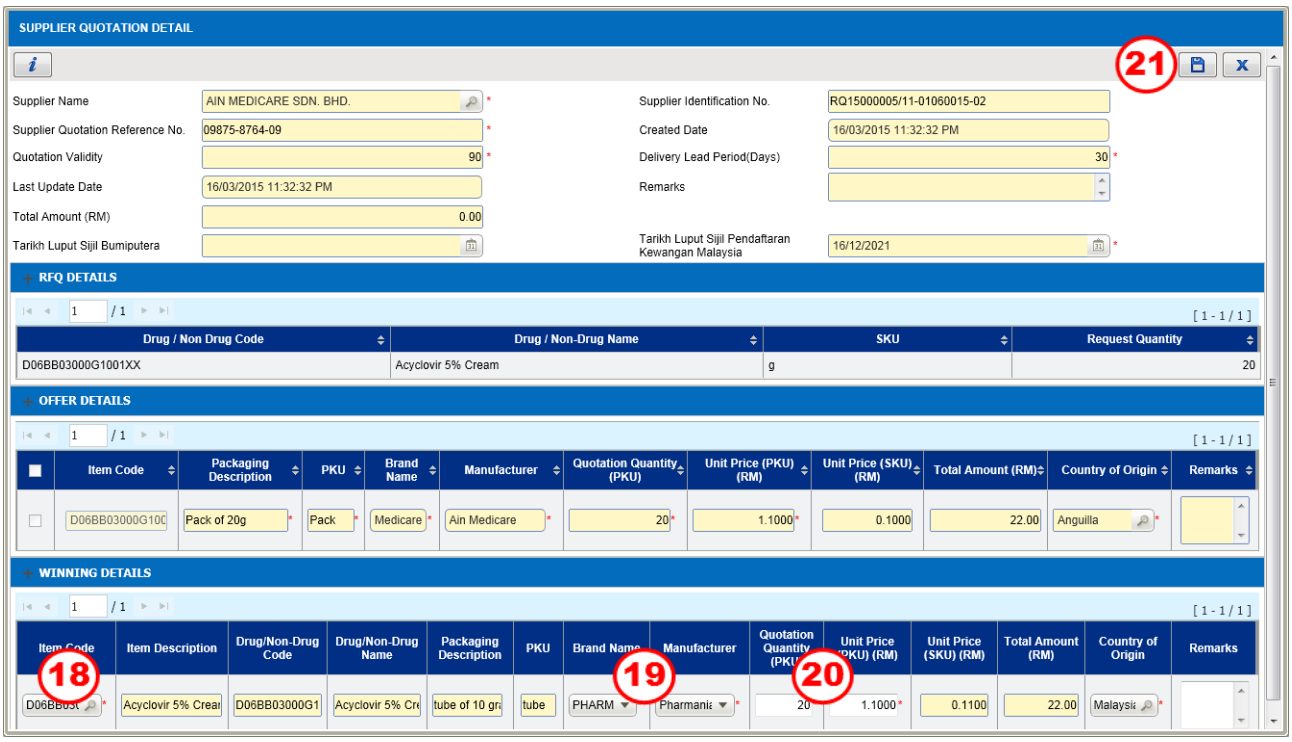

Figure 3.1.2-9 Supplier Quotation Information

STEP 18
Select ***Item Code***

Note
Item Description, Drug/Non Drug Code, Drug/Non Drug Name, Packaging Description *and* ***PKU*** *will be auto displayed base on the Item Code selected.*

STEP 19
Select ***Brand Name*** *from the drop down box*

Note
Manufacturer *will be display base on selected* ***Brand Name***

STEP 20
Enter ***Quotation Quantity (PKU)*** and ***Unit Price (PKU)(RM)***

Note
Unit Price (SKU)(RM) *and* ***Total Amount (RM)*** *will be auto calculated*

STEP 21

Click on the button to save the record

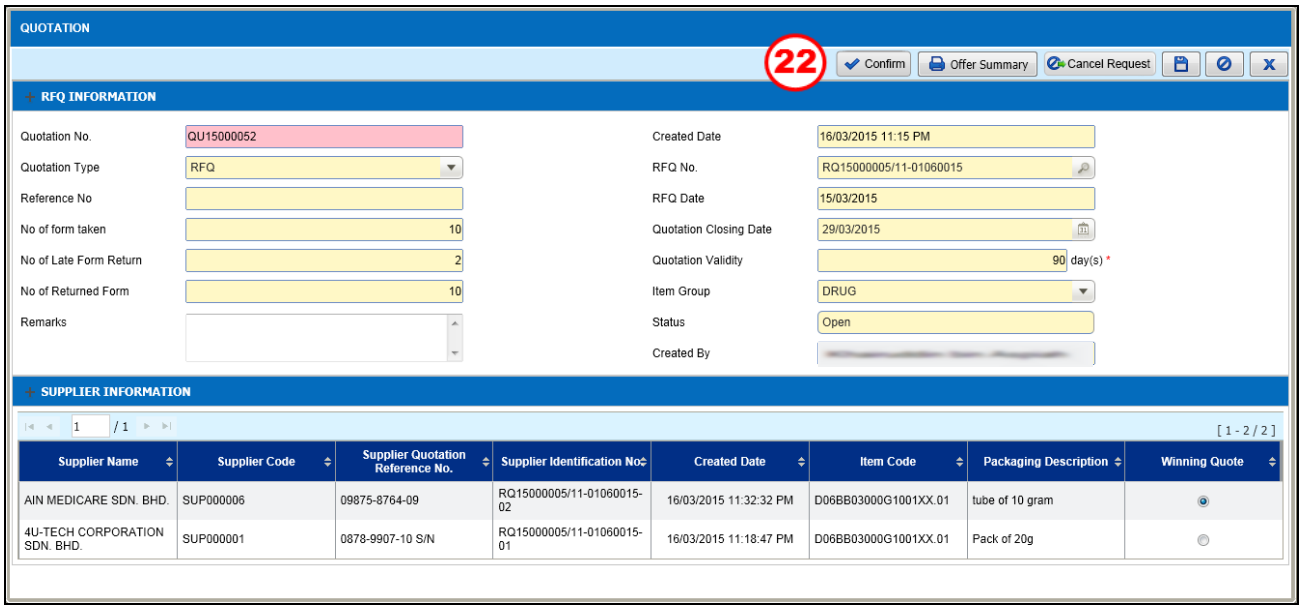

Figure 3.1.2-10 Quotation Confirmation

STEP 22

Click on the Confirm button to confirm the quotation transaction

Note

- *After click on the Confirm button, 'Status' will change to 'Confirm' and the quotation will flow to the Purchase Order screen.*
- *User may click on the Offer Summary button to reprint Borang Sebutharga*

3.1.3 Create Quotation: eP

This function is used to create new record for Quotation, perform steps below:

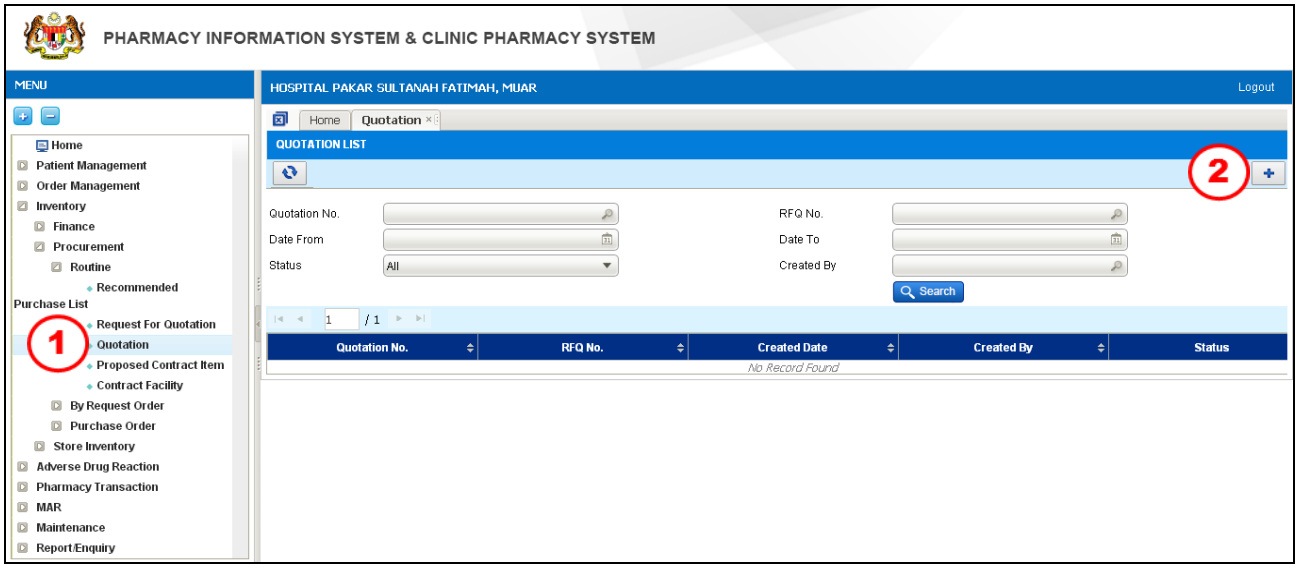

Figure 3.1.3-1 Quotation List

STEP 1

Click on 'Inventory' menu followed by 'Procurement' and 'Routine', and select 'Quotation'

STEP 2

Click on the button and screen as per Figure 3.1.3-2 will be displayed

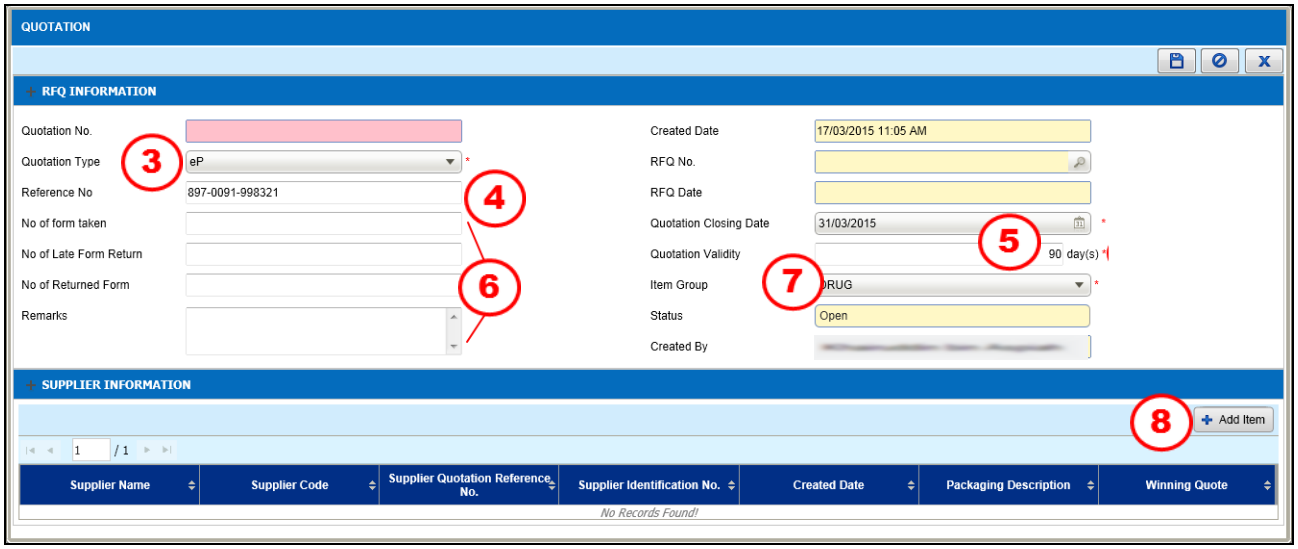

Figure 3.1.3-2 Add Drug

STEP 3
Select ***Quotation Type***: eP

STEP 4
Enter ***Reference No***

STEP 5
Select ***Quotation Closing Date*** and enter ***Quotation Validity (days)***

STEP 6
Enter this following fields if applicable
- No of Late Form Return
- No of Returned Form
- No of Returned Form
- Remarks

STEP 7
Select ***Item Group*** from dropdown box:
- Drug
- Non Drug

STEP 8

Click on the

button to add item

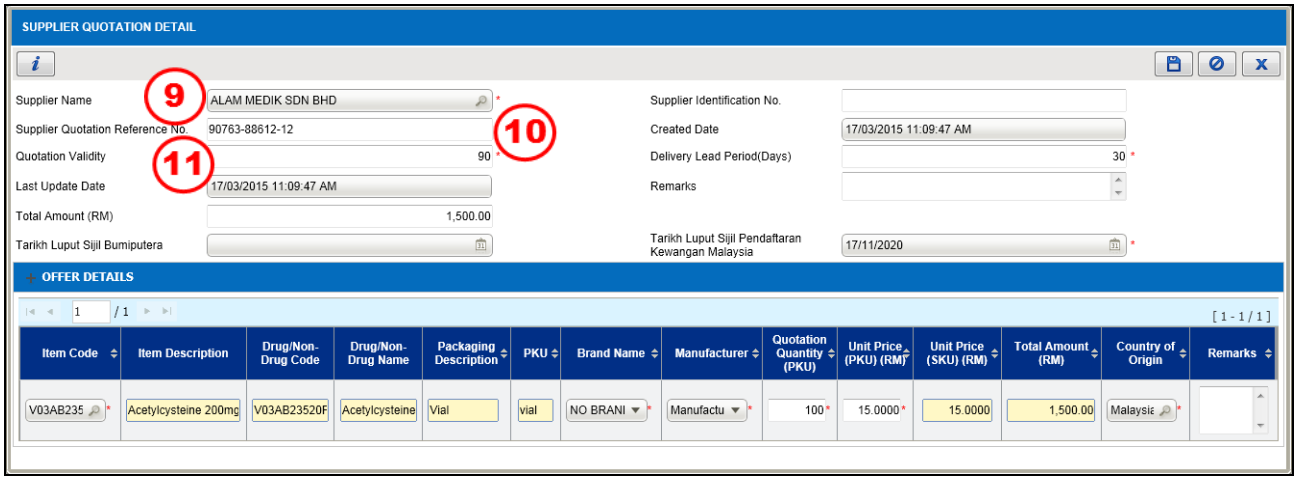

Figure 3.1.3-3 Supplier Quotation Detail

STEP 9
Search for ***Supplier Name***

STEP 10
Enter ***Supplier Quotation Reference No.***

STEP 11
Enter ***Quotation Validity***

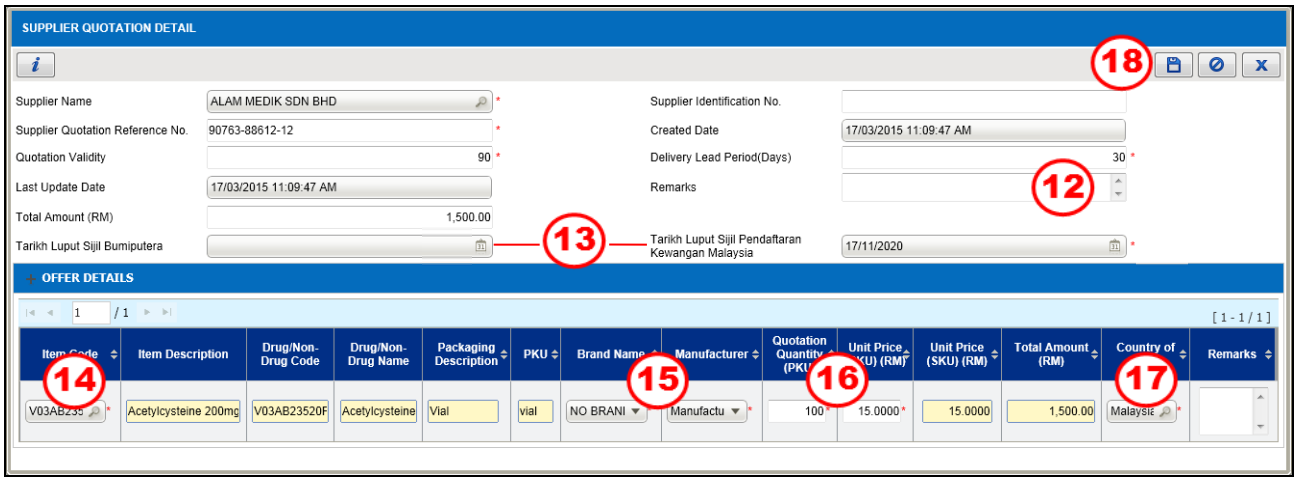

Figure 3.1.3-4 Supplier Quotation Detail

STEP 12
Enter ***Delivery Lead Period (Days)*** and ***Remarks*** if required

STEP 13
Select ***Tarikh Luput Sijil Bumiputera*** and ***Tarikh Luput Sijil Pendaftaran Kewangan Malaysia***

STEP 14
Select ***Item Code*** *from the drop down box*

Note
Item Description, Drug/Non Drug Code, Drug/Non Drug Name, Packaging Description *and* ***PKU*** *will be displayed base on the Item Code selected.*

STEP 15
Select ***Brand Name***

Note
'Manufacturer' will be displayed based on the selected Brand Name.

STEP 16
Enter ***Quotation Quantity (PKU)*** and ***Unit Price (PKU)(RM)***

Note
Unit Price (SKU)(RM) and Total Amount (RM) will be auto calculated.

STEP 17
Select ***Country of Origin*** *and enter* ***Remarks*** *if applicable*

STEP 18
Click on the button to save the transaction

Note
- *An alert message will be displayed as shown in Figure 3.1.3-5 and Figure 3.1.3-6*

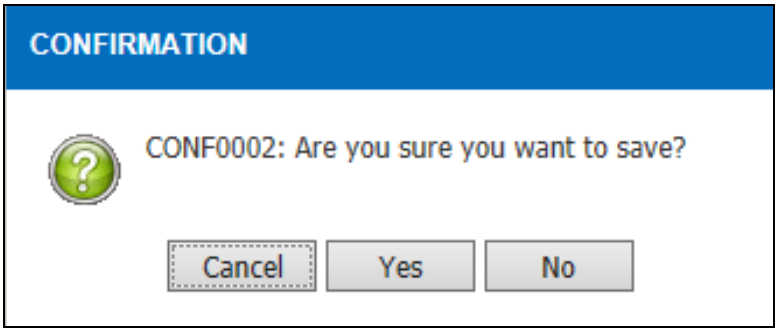

Figure 3.1.3-5 Alert Messages

- *If click on the* No *button, record will not be saved and proceed to Purchase Order.*

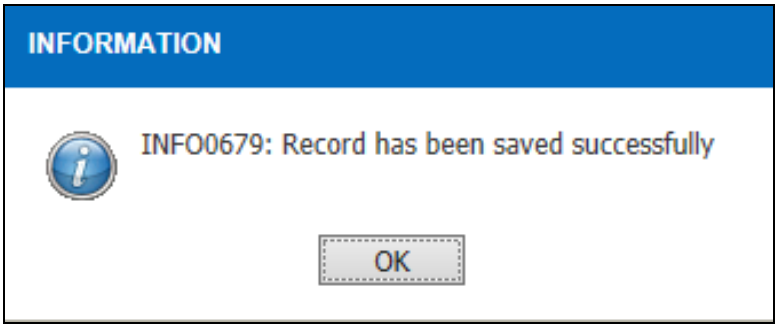

Figure 3.1.3-6 Alert Messages

- *Click on the* OK *button, record will be successfully saved and updated.*
- *System will be automatically selected in the 'Winning Quote' check box to proceed with Purchase Order process as per Figure 3.1.3-7.*

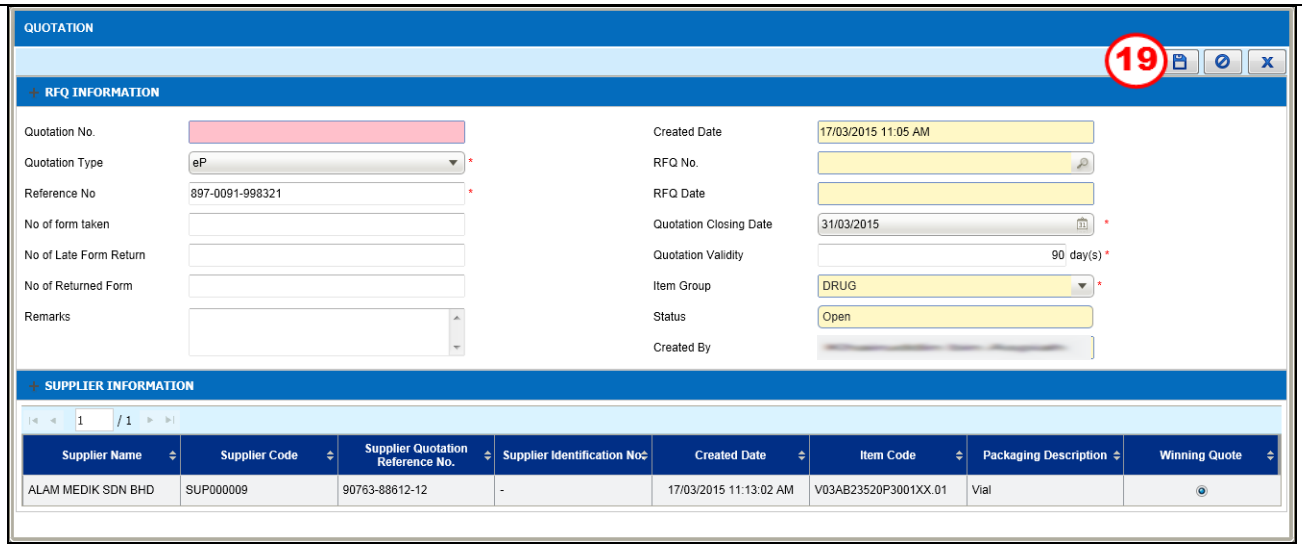

Figure 3.1.3-7 Quotation (RFQ Information)

STEP 19

Click on the button to save the transaction

Note

- *An alert message will be displayed as shown in Figure 3.1.3-8 and Figure 3.1.3-9.*

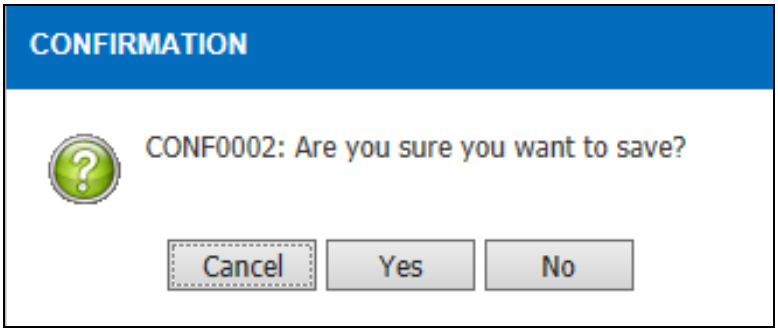

Figure 3.1.3-8 Confirmation Alert Messages

- *If click on the* Yes *button, record will be saved and proceed with Purchase Order.*
- *If click on the* No *button, record will not be saved and proceed to Purchase Order.*

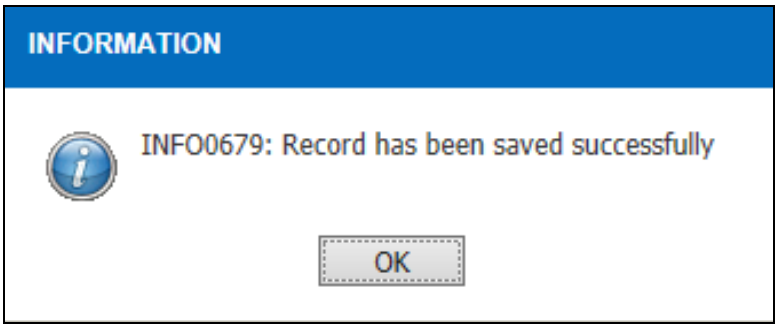

Figure 3.1.3-9 Information Alert Messages

- *Click on the* OK *button, record will be successfully saved and updated. As a result, data will be successfully saved and Quotation updated.*

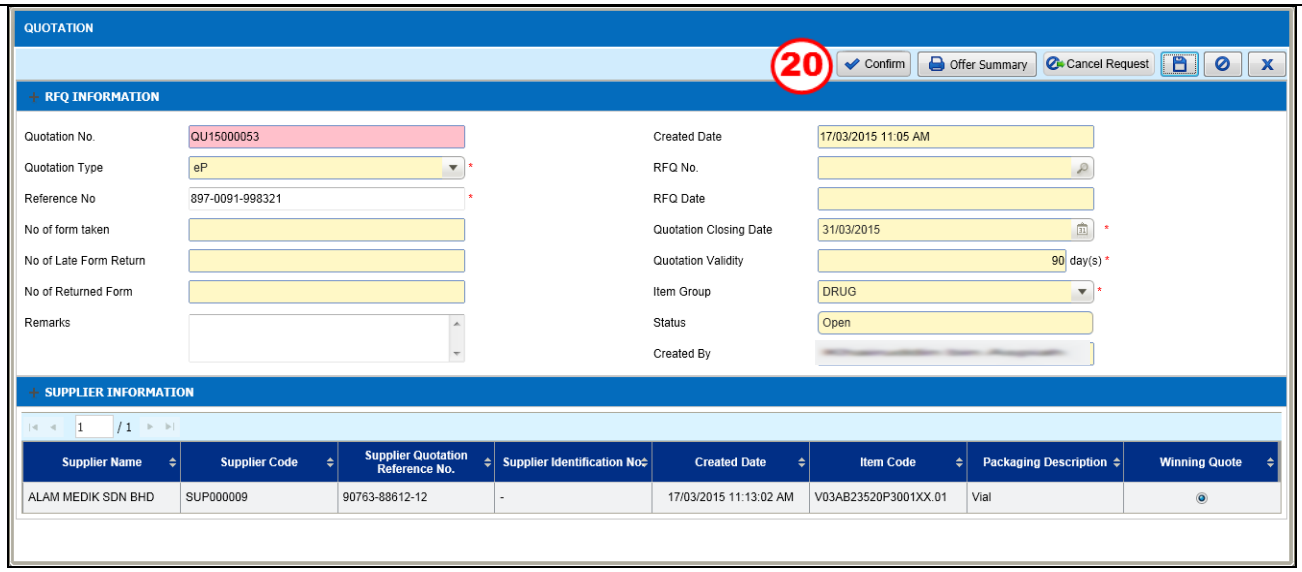

Figure 3.1.3-10 Offer Summary

STEP 20

Click on the Confirm button to confirm the quotation transaction

Note

- *After click on the Confirm button, Status will change to 'Confirm' and the Quotation No. will proceed to the Purchase Order screen.*
- *Click on the Offer Summary button to print 'Borang Sebutharga'.*
- *Click on the Cancel Request button to cancel the Quotation transaction.*

3.2 Purchase Order Listing Page

To view existing Purchase Order record, perform the steps below:

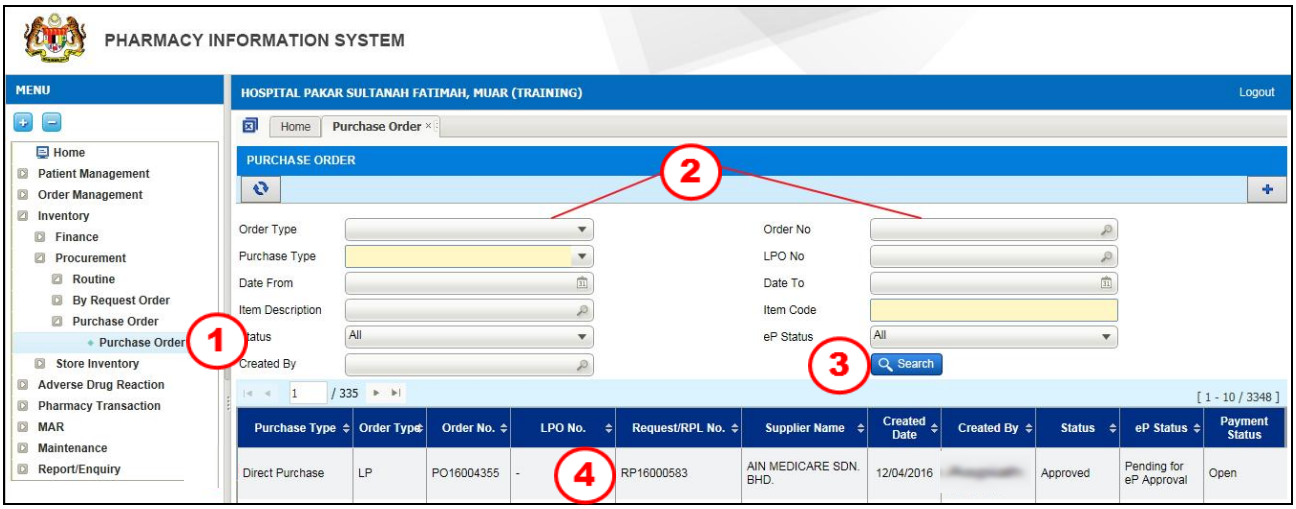

Figure 3.2-1 LP Quotation Purchase Order

STEP 1
Click on 'Inventory' menu followed by 'Inventory' and 'Procurement', and select 'Purchase Order'

STEP 2
To search for existing purchase order transaction, you may search by criteria as follow:

a) Order Type
   - APPL
   - Contract
   - LP
b) Order No
c) Purchase Type
   - Direct
   - Quotation
d) LPO No
e) Date From
f) Date To
g) Item Description
h) Item Code
i) Ep Status
   - Ep Approved
   - Ep Rejected
   - Pending for Ep Approval
j) Status
   - ALL
   - Open
   - Pending to Approval
   - Approved
   - Cancelled
   - Closed
   - Rejected

STEP 3
Click on the Search button after entered criteria and the result displayed will be based on the entered criteria as per Figure 3.2-1. In circumstances of no criteria is entered, the entire list of transaction will be displayed

STEP 4
Double click on the selected record and the details will be displayed

3.3 Purchase Order Approval

Pharmacist will receive notification in Task List for any Purchase Order that needs to be approved.

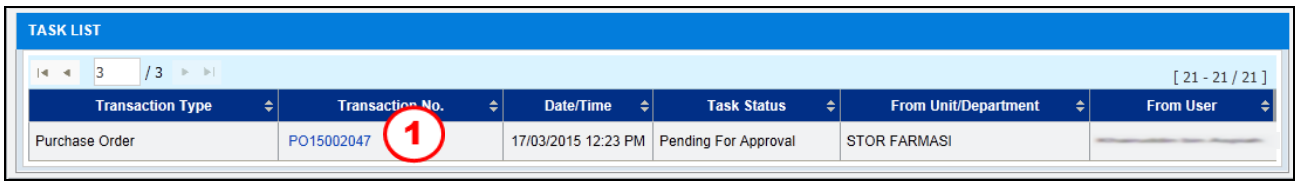

Figure 3.3-1 Task List

STEP 1
Click on the ***Transaction No hyperlink***

Note
Pharmacist has option to go to the listing page and search for 'Pending for Approval' Purchase Order.

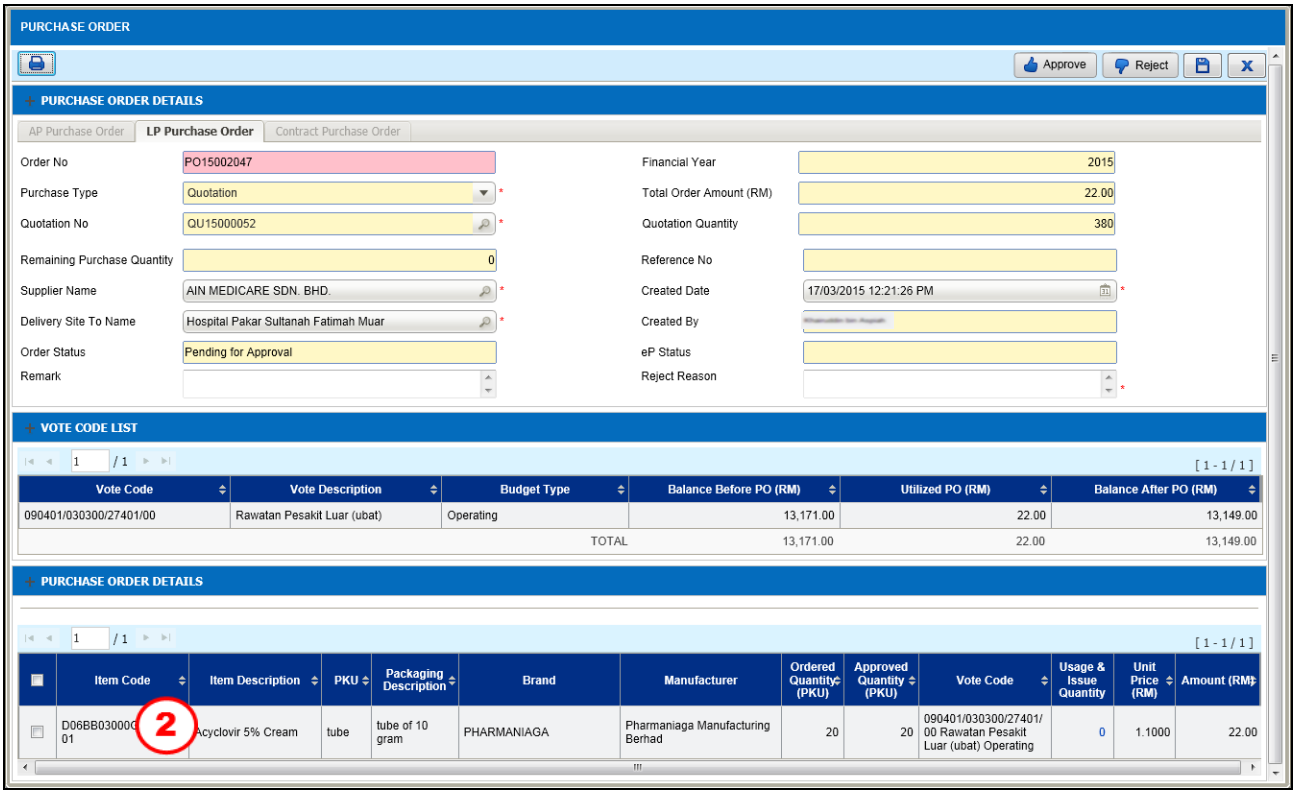

Figure 3.3-2 Purchase Order Approve

STEP 2
Double click on item details in the '***Purchase Order Details***' section and system will display screen as shown in Figure 3.3-3. Amend 'Approved Quantity (PKU) and Unit Price (RM) if necessary

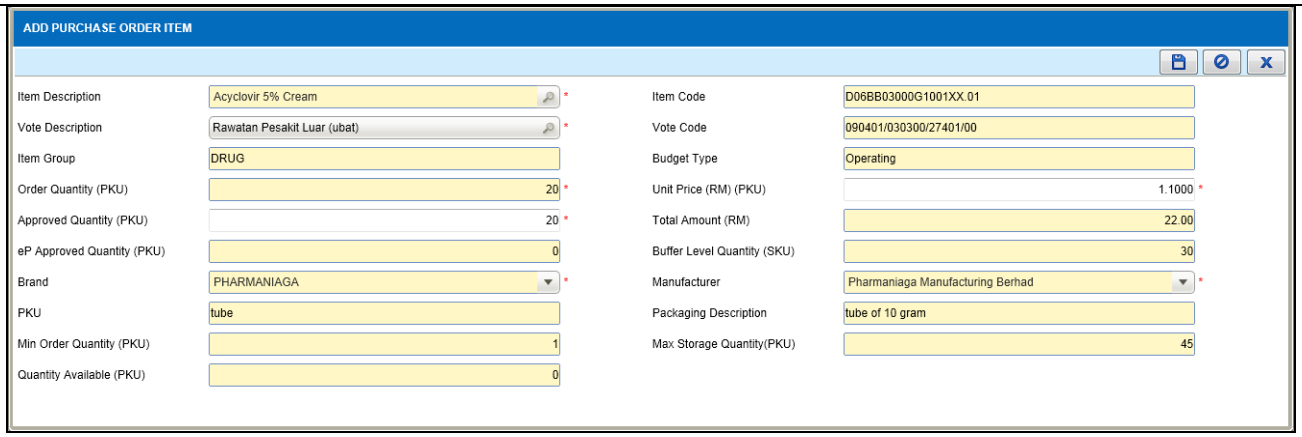

Figure 3.3-3 Add Purchase Order Item

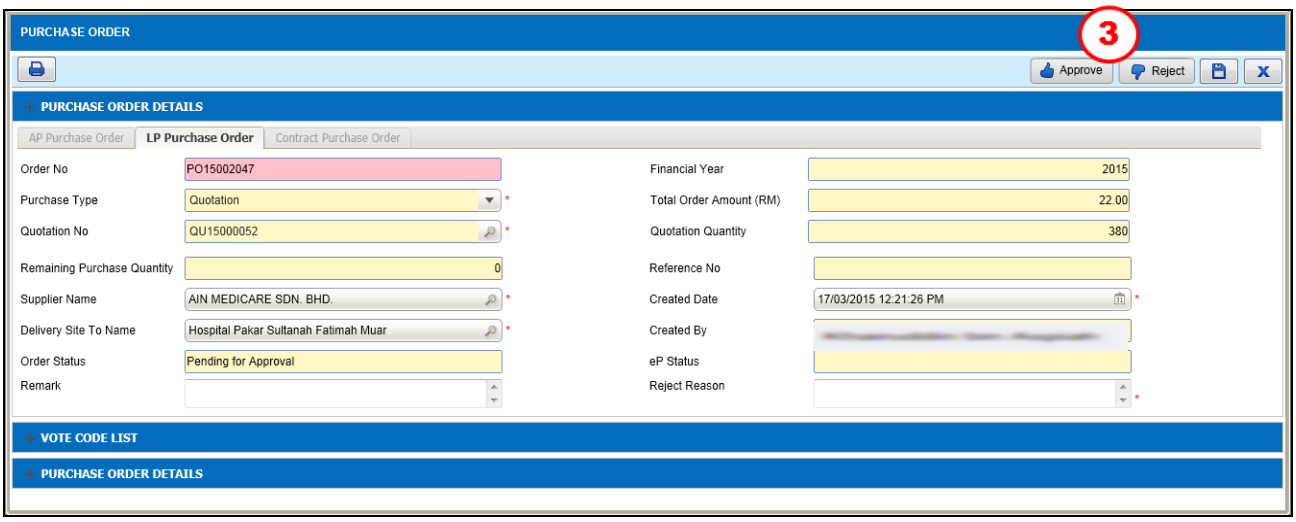

Figure 3.3-4 Purchase Order Approval

STEP 3

Click on the

button to approve the Purchase Order or

Click on the

button to reject the Purchase Order

Note

After the Purchase Order is approved, Pelulus for eP will lodge into the eP system manually and get approval from eP. Once the order is approved in eP, details of the LPO need to be entered back into the PhIS system.

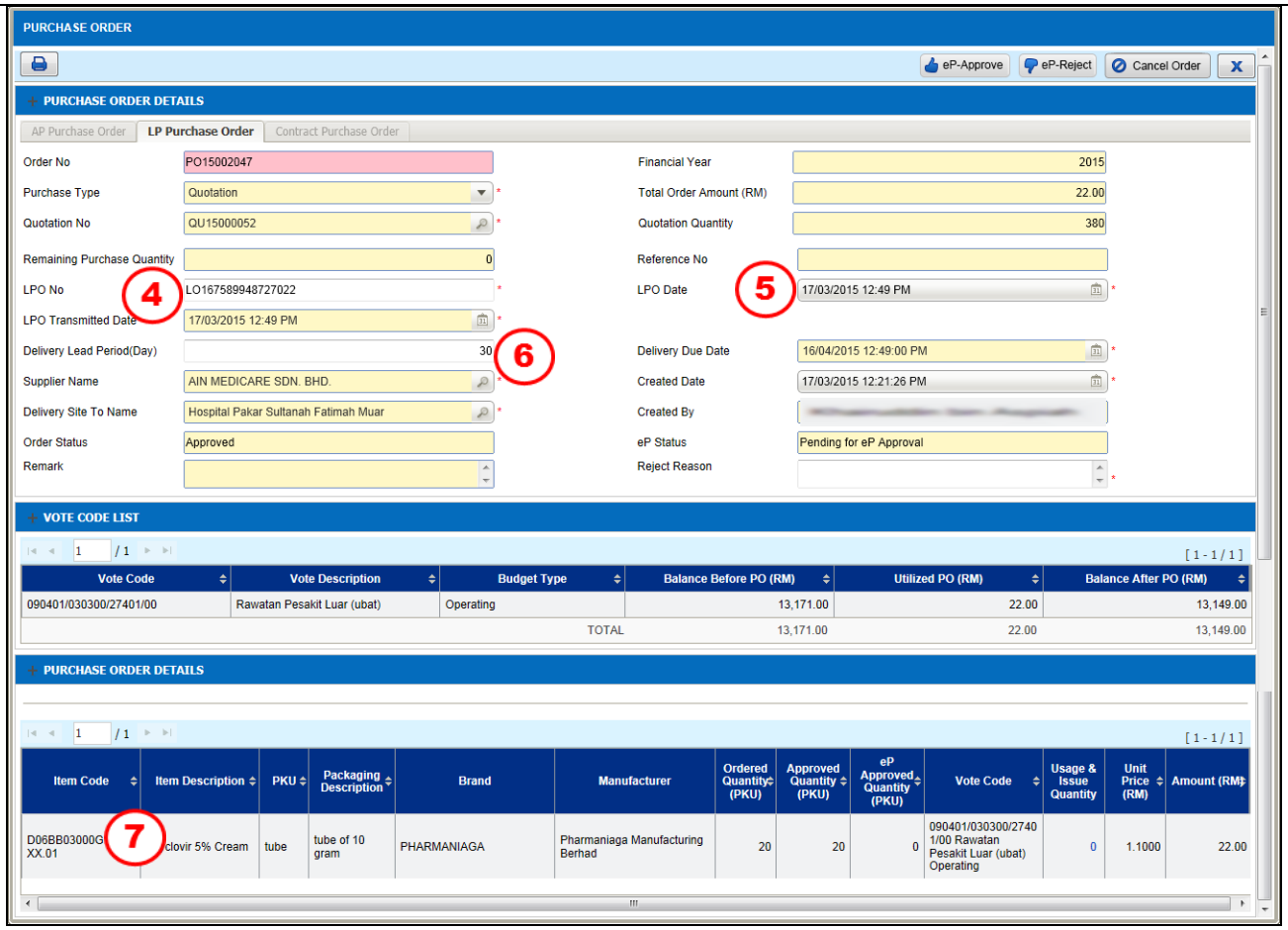

Figure 3.3-5 eP Approval

STEP 4
Enter ***LPO No.***

STEP 5
Select ***LPO Date***

STEP 6
Enter ***Delivery Lead Period(Day)***

Note
Delivery Due Date *will be auto generated*

STEP 7
Double Click on item details to update ***eP Approved Quantity (PKU)***

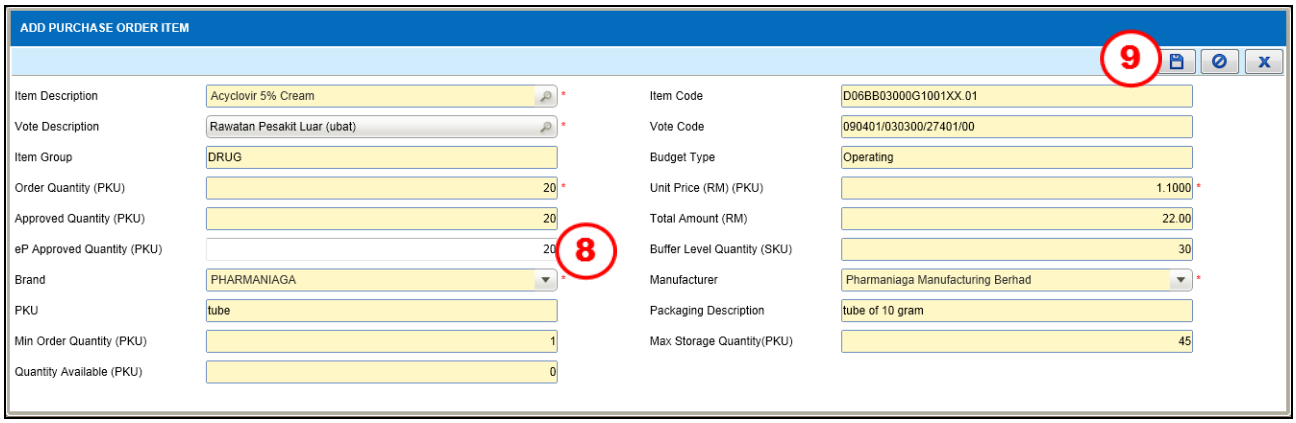

Figure 3.3-6 Add Purchase Order Item

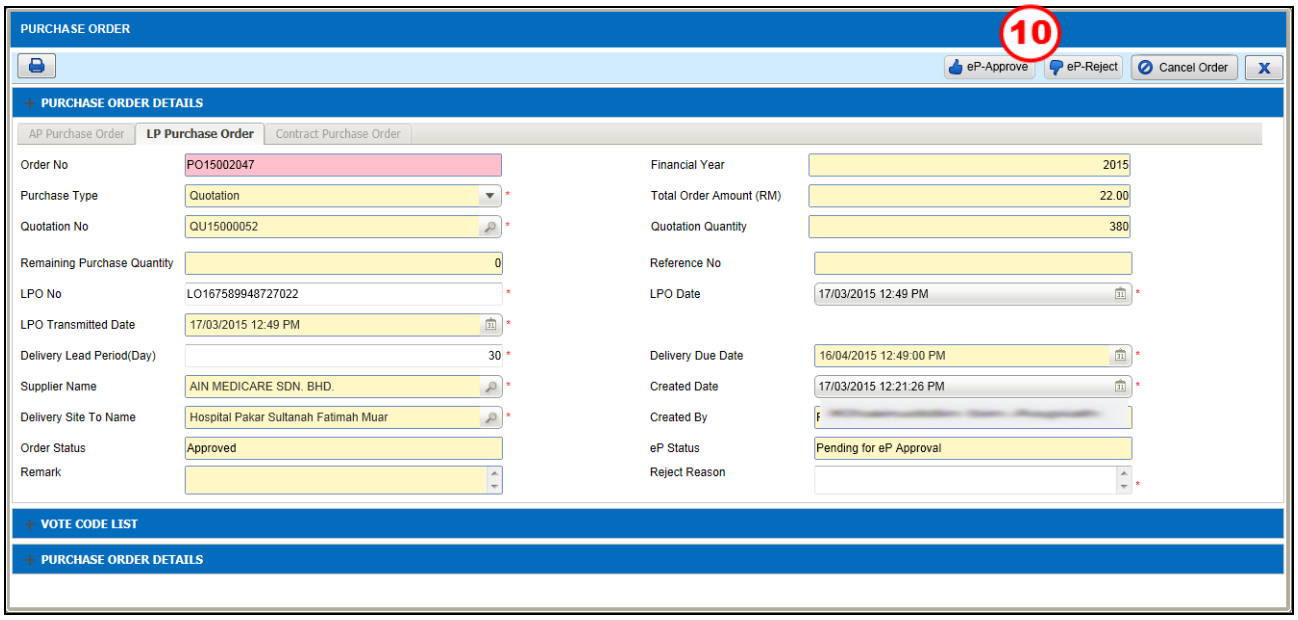

Figure 3.3-7 Purchase Order

STEP 8

Enter ***eP Approved Quantity (PKU)***

STEP 9

Click on the button to save the transaction

STEP 10

Click on the eP-Approve button if eP approve the order or

Click on the eP-Reject button if eP rejects the order

Note

Order that approved by eP will flow to the receiving process.

4.0 Acronyms

Abbreviation	Definition
PhIS	Pharmacy Information System
CPS	Clinical Pharmacy System
MOH	Ministry Of Health
HQ	Headquarters
UOM	Unit Of Measure
SKU	Store Keeping Unit
PKU	Packaging Keeping Unit
RFQ	Request for Quotation

5.0 Links To Inventory Modules

No	*Module*	*PDF Links*	*No*	*Module*	*PDF Links*
1	*Finance*	Click Here	*15*	*Internal Indent*	Click Here
2	*Procurement Standard APPL*	Click Here	*16*	*Issue*	Click Here
3	*Procurement standard LP*	Click Here	*17*	*Receive From Supplier*	Click Here
4	*Procurement Standard Contract*	Click Here	*18*	*Receive Inter Facility*	Click Here
5	*Procurement Standard Quotation*	Click Here	*19*	*Receive Intra Facility*	Click Here
6	*Procurement Standard (RFQ)*	Click Here	*20*	*Return to Supplier*	Click Here
7	*Procurement Non Standard (Requisition Order)*	Click Here	*21*	*Return to Supplying Unit*	Click Here
8	*Quarantine*	Click Here	*22*	*Slow Moving*	Click Here
9	*Product Complaint*	Click Here	*23*	*Stock Taking And Verification*	Click Here
10	*Recalculate Buffer Level*	Click Here	*24*	*Stock Transfer*	Click Here
11	*Expiration And Condemn*	Click Here	*25*	*Year End*	Click Here
12	*Recall Product*	Click Here	*26*	*Penalty*	Click Here
13	*Payment*	Click Here	*27*	*IWP Budget*	Click Here
14	*External Indent*	Click Here	*28*	*IWP Order Authorization*	Click Here