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

User Manual
Pharmacy Inventory – Procurement
(Quotation)

Revision History

Version No	Date of Release	Prepared By	Reviewed / Verified by	List of changes from previous Version
1.0	07/01/2014	Nabilah binti Hanafi	Shamsul-'Ariza (SA)	First submission to MOH
1.1	06/05/2014	Siti Baizura bt Ab. Razak	Shamsul-'Ariza (SA)	Application interface changes (screen)
1.2	05/12/2014	Fitriani Binti Tiro	Shamsul-'Ariza (SA)	Application interface changes (screen)
1.3	21/05/2015	Ahmad Anwar Jaafar	Shamsul-'Ariza (SA)	Update to Version 1.3
1.4	14/04/2016	Nor Hafiz Bin Kamal Baharin	Shamsul-'Ariza (SA)	Change to latest screenshot and add additional features
1.5	01/03/2017	Muhamad Hilmi Bin Mokhtar	Shamsul-'Ariza (SA)	Change to latest screenshot and functions for version 1.5.1

Verified and Acknowledged By:

Name	Role / Designation	Organization	Signature & Date
Muazzam bin Zulzalalin	Team Lead	Pharmaniaga Logistics Sdn. Bhd.	

Name	Role / Designation	Organization	Signature & Date
		Bahagian Perkhidmatan Farmasi (BPF), KKM	

Peer Review

Version No	Reviewed / Verified By	List of changes from Previous Version
1.0	Maxine Wong (QA) Juridah Ayub (QA)	First submission to MOH
1.1	Maxine Wong (QA) Juridah Ayub (QA)	Application interface changes (screen)
1.2	Maxine Wong (QA) Juridah Ayub (QA)	Application interface changes (screen)
1.3	Maxine Wong (QA) Juridah Ayub (QA)	Update to Version 1.3
1.4	Maxine Wong (QA) Juridah Ayub (QA)	Change to latest screenshot and add additional features
1.5	Michelle Foo / Juraidah Ayob (QA)	Change to latest screenshot and functions for version 1..5.1

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Application Reference: PhIS & CPS v1.5.1

Table of Contents

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:
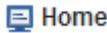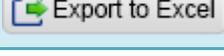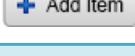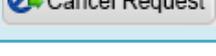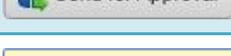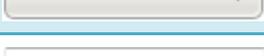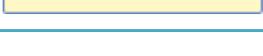
- Quotation

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	**C**	Reset Login Screen
+	Expand Menu	**−**	Collapse Menu
Home	Display Home Tab	**▷**	Expand Module
◢	Collapse Module	**⊠**	Close All Open Tabs
↻	Refresh Screen	**Q Search**	Search Record
+	Add/Create New Record	**i**	Show Help
🖨	Print	*****	Mandatory Field
📅	Calendar Icon	**🔍**	Search Icon
X	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.*

2.2 Latest Enhancement and Updates

Latest Functions	Page

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
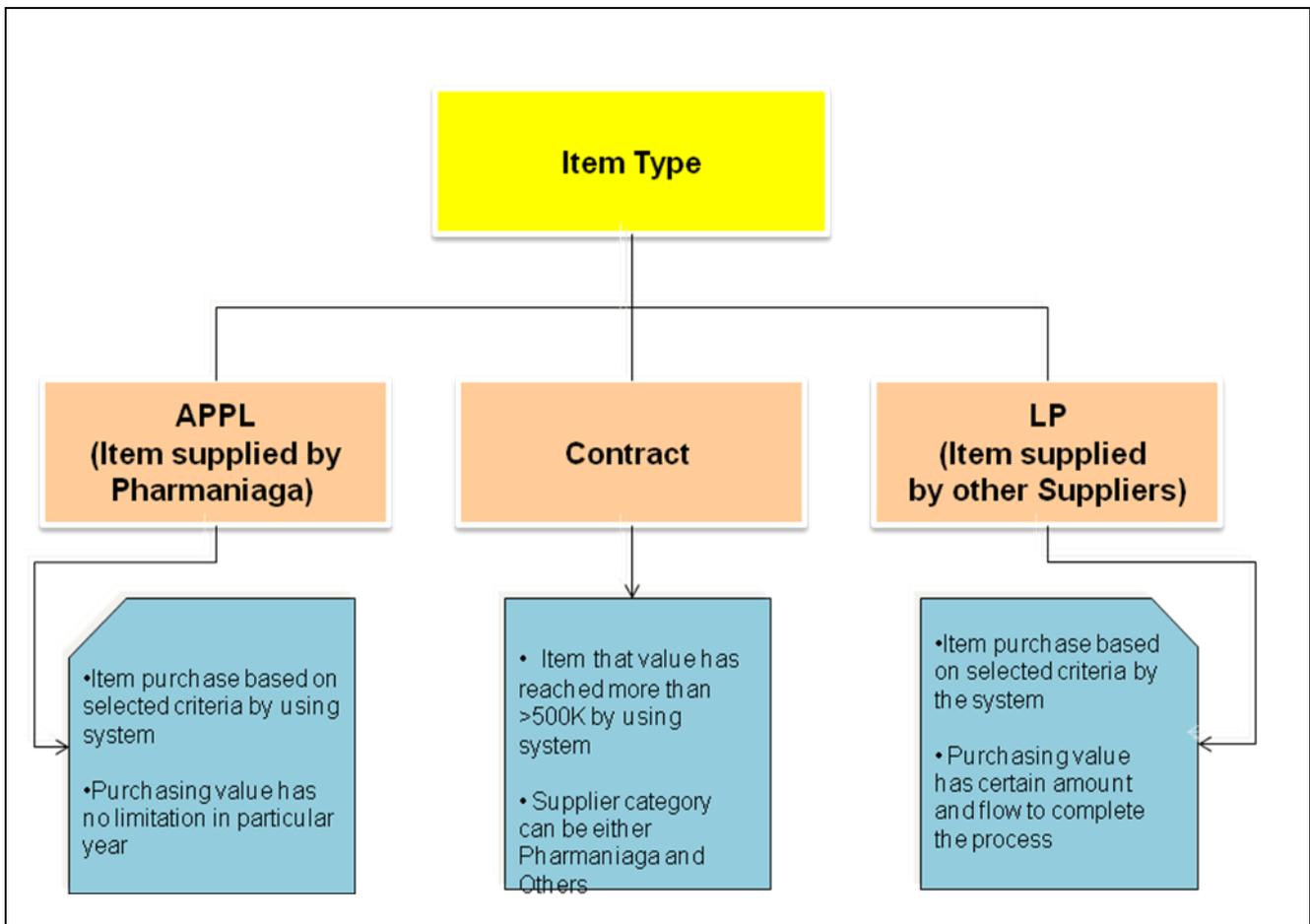
Figure 3.0-1

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 [Q 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*

Note

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*
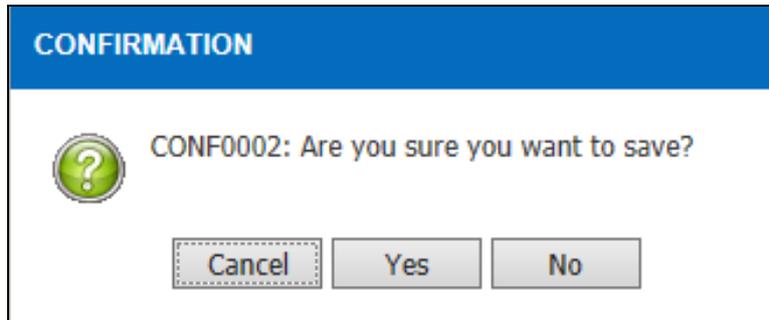
Figure 3.1.2-4 Confirmation Alert Messages

- *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.*
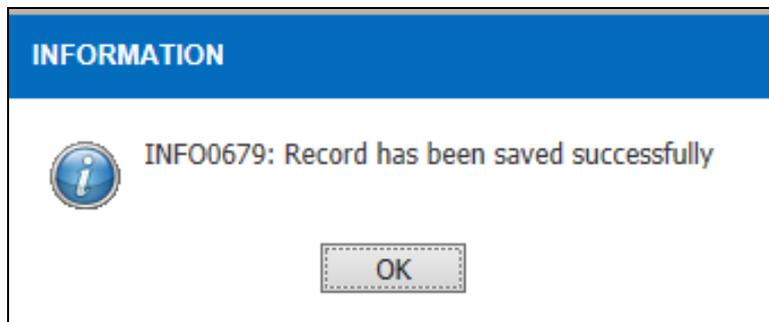
Figure 3.1.2-5 Information Alert Messages

- *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 ![save] button to save the transaction

Note
Winning supplier information updated to proceed in Purchase Order transaction.
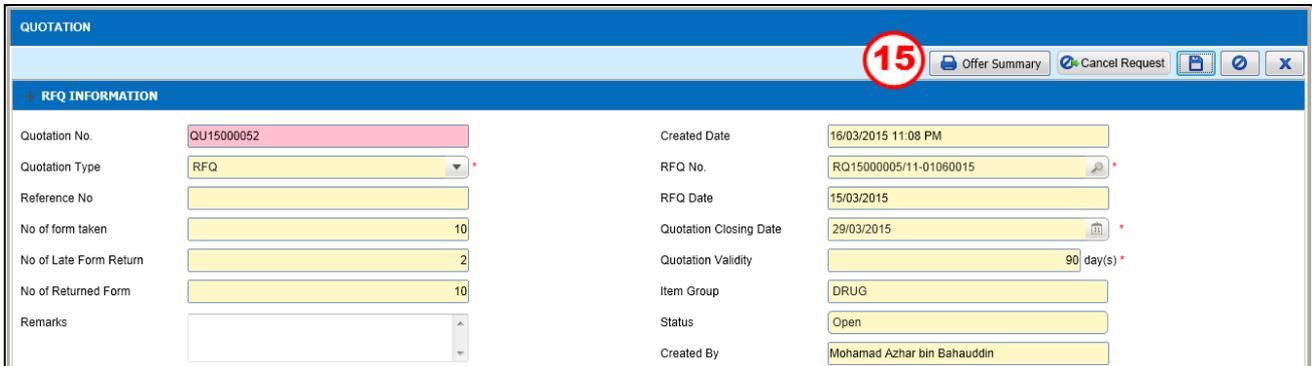
Figure 3.1.2-7 Supplier Quotation Detail

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

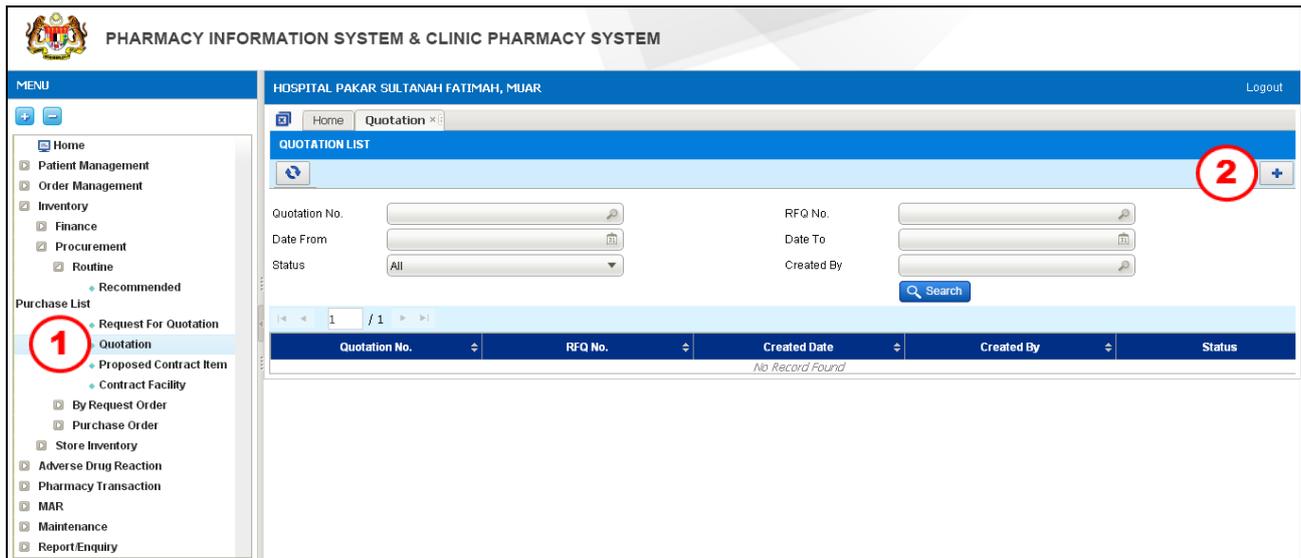This function is used to create new record for Quotation, perform steps below:

Figure 3.1.3-1 Quotation List

STEP 1
Click on 'Inventory' menu followed by 'Procurement' and 'Routine', and select 'Quotation'

STEP 2
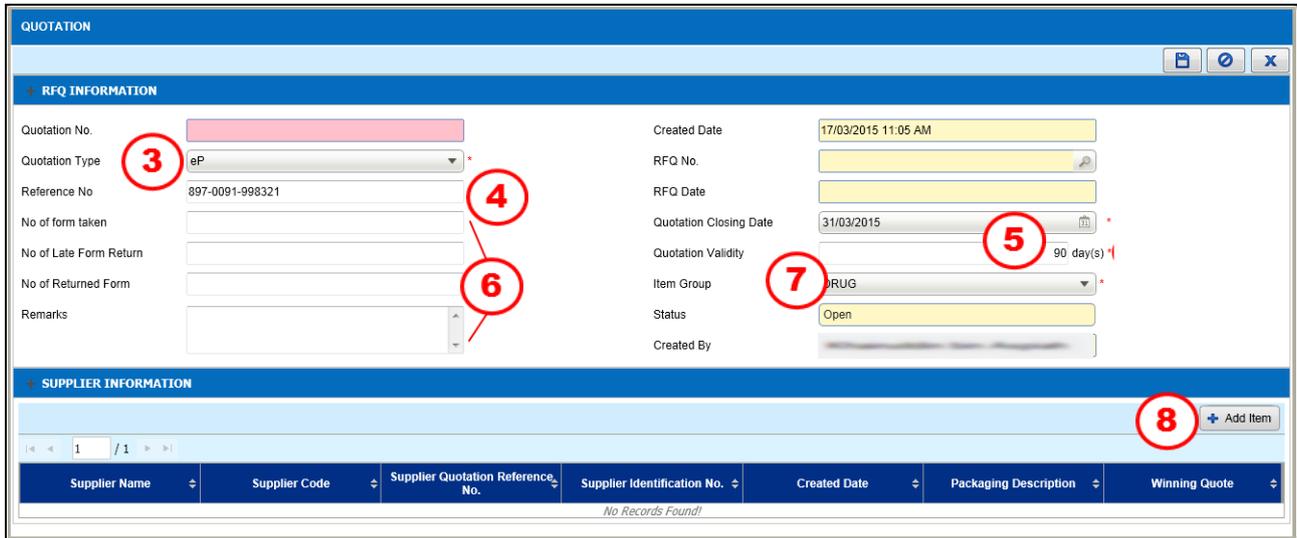Click on the [+] button and screen as per Figure 3.1.3-2 will be displayed

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
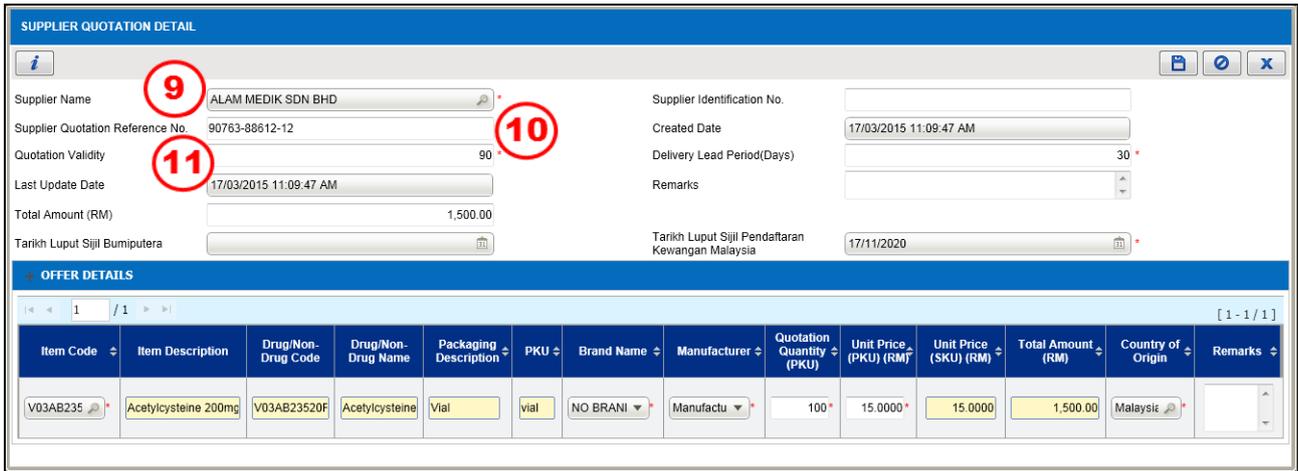- No of Returned Form
- Remarks

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

STEP 8

Click on the [+ Add Item] 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*

CONFIRMATION

CONF0002: Are you sure you want to save?
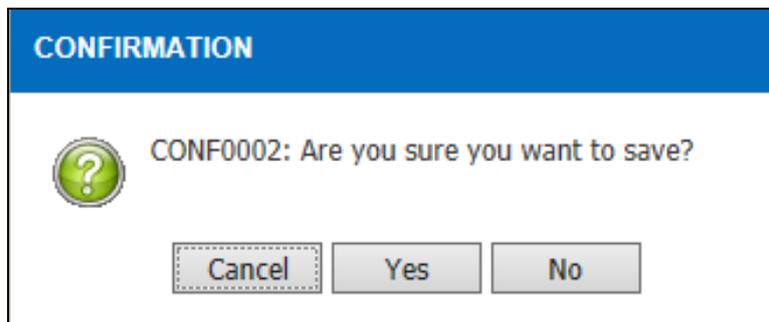
Cancel   Yes   No

Figure 3.1.3-5 Alert Messages

- *If click on the [No] button, record will not be saved and proceed to Purchase Order.*
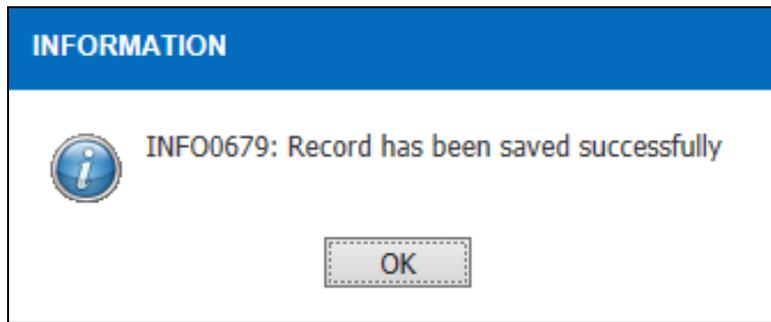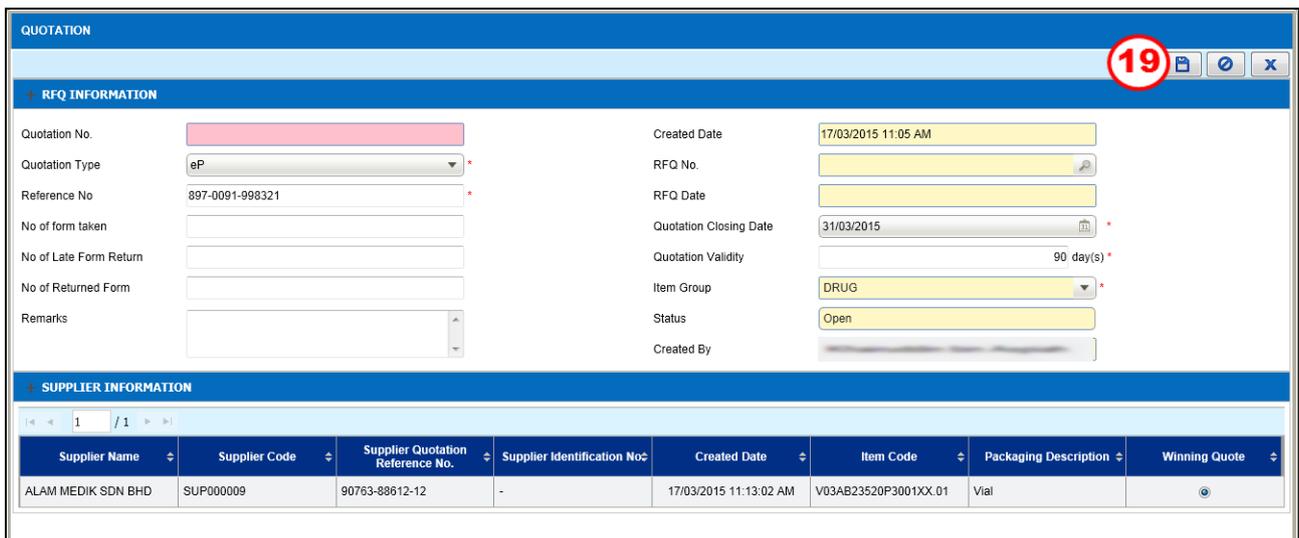
Figure 3.1.3-6 Alert Messages

- *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

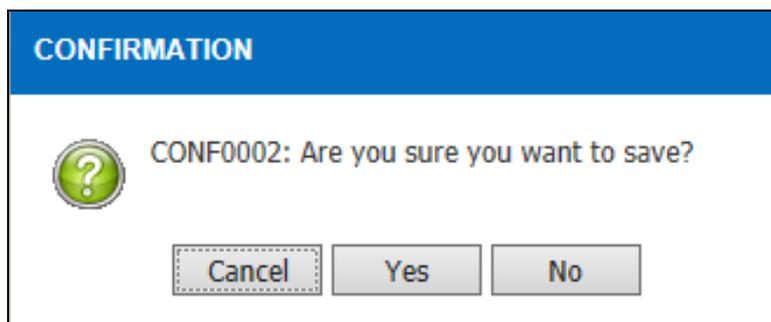- *An alert message will be displayed as shown in Figure 3.1.3-8 and Figure 3.1.3-9.*

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.*

INFORMATION

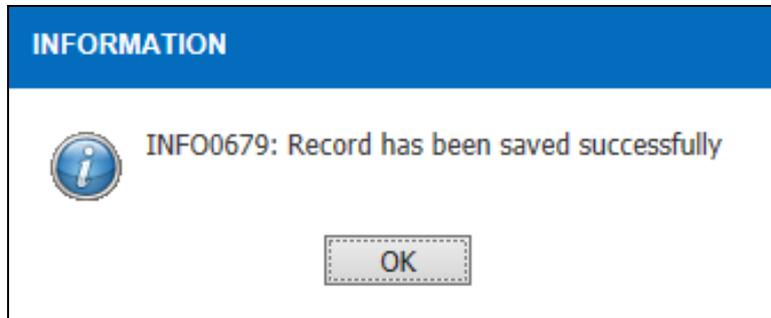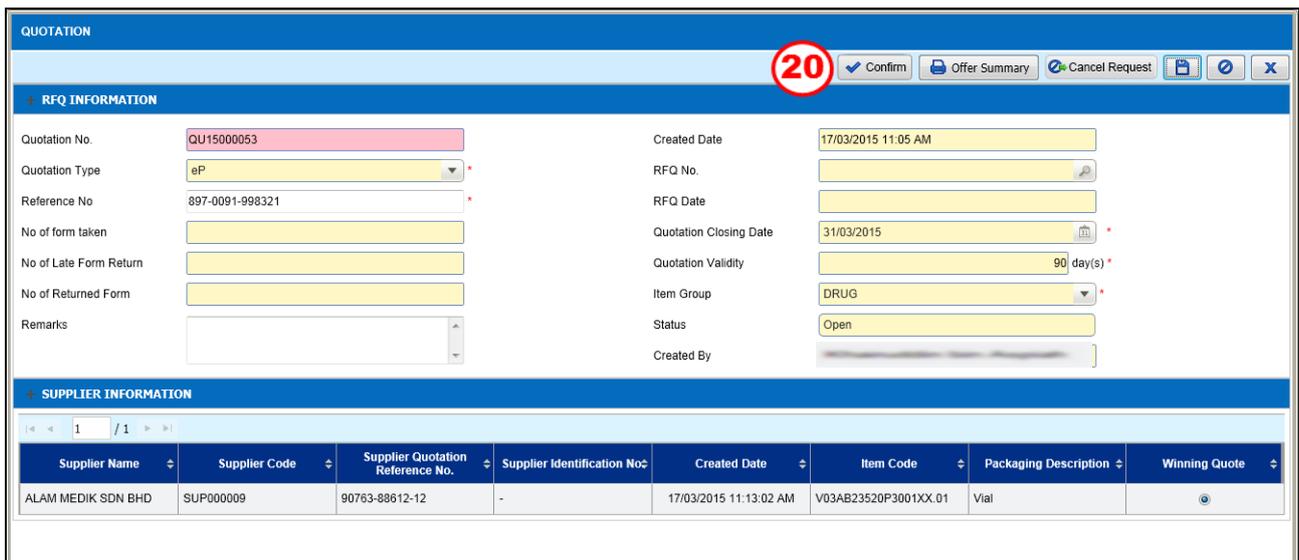INFO0679: Record has been saved successfully

OK

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
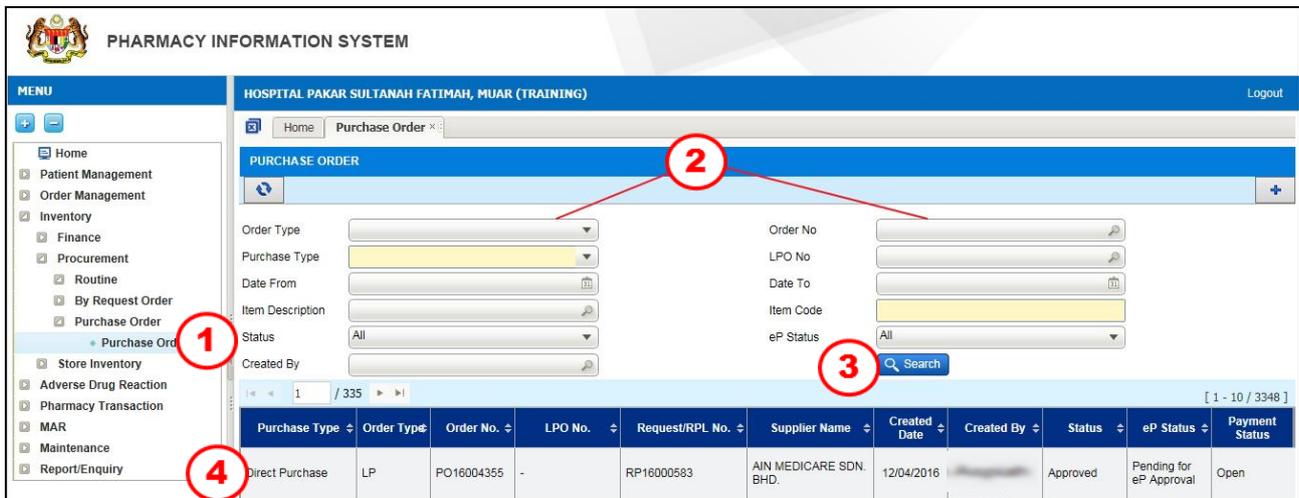
STEP 20

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
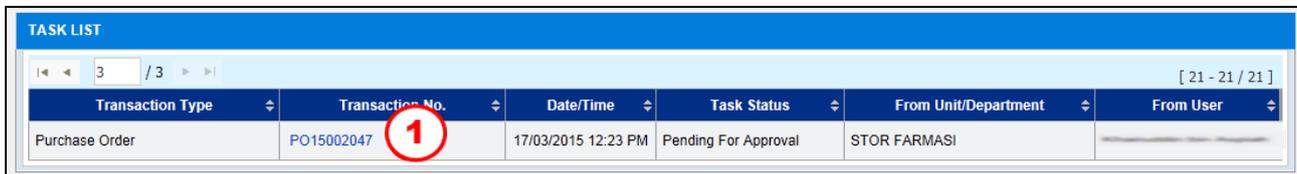- Approved
- Cancelled
- Closed
- Rejected

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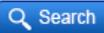
Click on the ![Q Search] button after entered criteria and the result displayed will be based on the entered criteria as per Figure 3.2-1. In circumstances of no criteria is entered, the entire list of transaction will be displayed

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. Please refer to section 4.1 Purchase Order Listing Page to search for any Pending for Approval records

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.

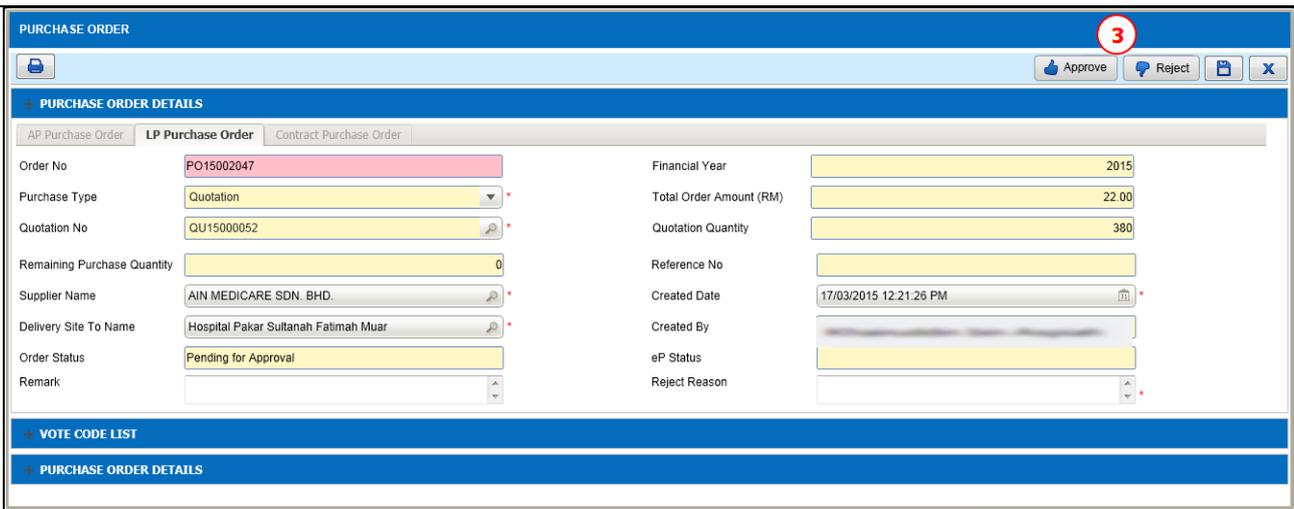**Figure 3.3-2 Purchase Order Approve**

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 [Approve] button to approve the Purchase Order

Click on the [Reject] 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)*
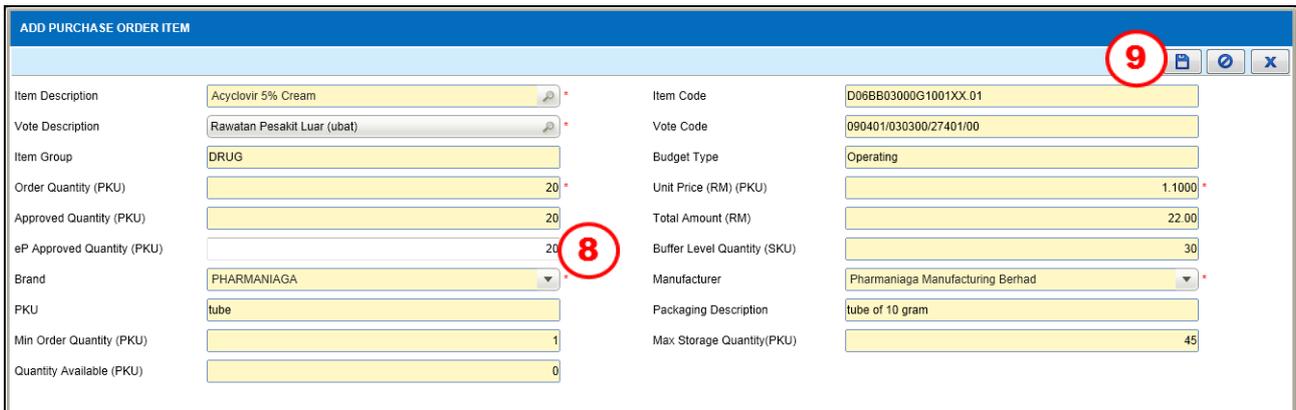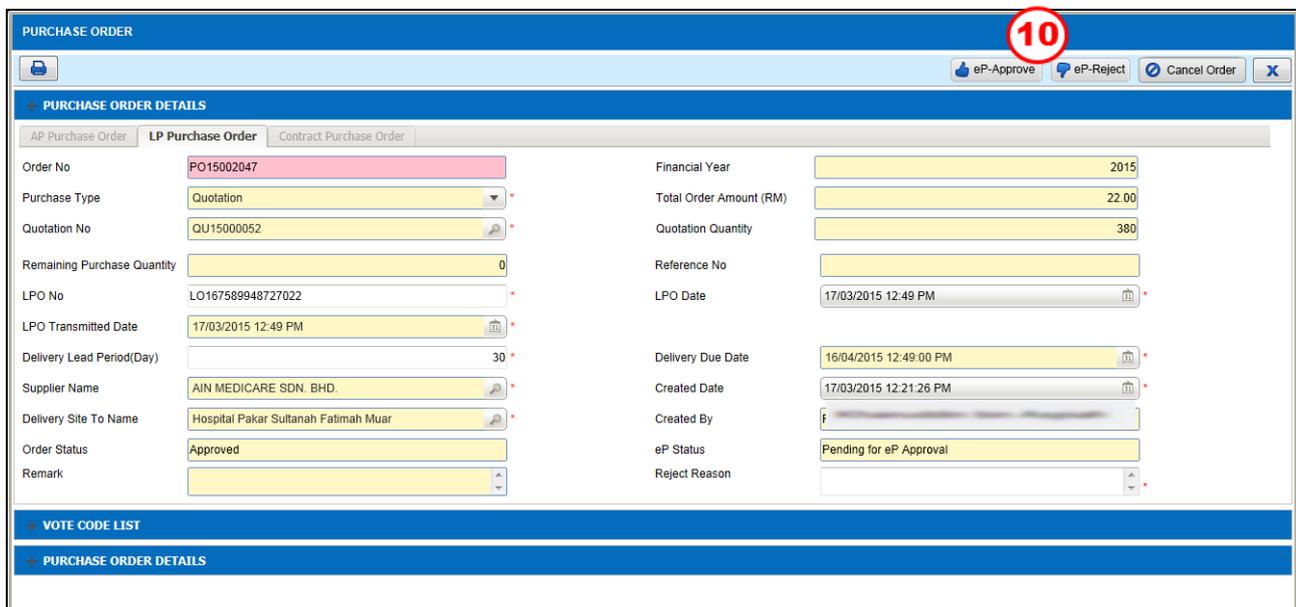
Figure 3.3-6 Add Purchase Order Item
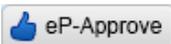
Figure 3.3-7 Purchase Order

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

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 Purchase Order

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

No
Module
PDF Links
No

1

Finance
Click Here

External Indent
Click Here

14

Procurement Standard APPL
Click Here

2

15

Internal Indent
Click Here

Procurement standard LP
Click Here

3

16

Issue
Click Here

4

Procurement Standard Contract
Click Here