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

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# User Manual
# Pharmacy Inventory
# Procurement Standard (LP)

*Reference ID  : U.MANUAL_INV_PROCUREMENT STANDARD (LP)-8th EDITION*

*Application reference: PhIS & CPS v1.8.1*

## 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. 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 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 (PN), 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 – Procurement standard LP 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:

• Create RPL Standard Procurement LP

• RPL Approval
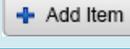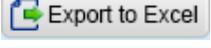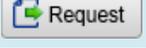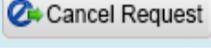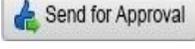
• Create Purchase Order LP

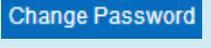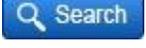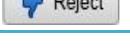• Purchase Order Approval

### 1.3   Organised Sections

These are the sections within this document:

• Section 1 : Introduction

• Section 2 : Application Standard Features

• Section 3 : Procurement Standard LP

• Section 4 : Acronyms

• Section 5 : Links to Inventory Modules

## 2.0 Application Standard Features

### 2.1 PhIS Legend

| Standard Legend | | | |
|---|---|---|---|
| **LOGIN** | Login to PhIS | **Logout** | Logout from PhIS |
| C | Reset Login Screen | + | Expand Menu |
| Home | Display Home Tab | ▶ | Expand Module |
| ⊠ | Close All Open Tabs | ↻ | Refresh Screen |
| ✚ | Add/Create New Record | *i* | Show Help |
| * | Mandatory Field | 31 | Calendar Icon |
| X | Close Window | ○ | Radio Button |
| ✏ | Edit Record | ⊘ | Cancel |
| 💾 | Save | ✚ Add Item | Add Item to the list |
| Export to Excel | Export and Open Report in Excel Format | | Automatically Display/Retrieve Box |
| Request | Request for Approval | Cancel Request | Cancel the Request |
| Send for Approval | Send for Approval | 👍 Approve | Approve Transaction |
| Change Password | Change Login Password | − | Collapse Menu |
| ◩ | Collapse Module | Q Search | Search Record |
| 🖨 | Print | 🔍 | Search Icon |
| ☐ | Checkbox | 🗑 | Delete Record |
| 🗑 Delete | Delete Item from the list | | Empty Text Box |
| ▼ | Dropdown Box | 👎 Reject | Reject Transaction |

| Module Legend | | | |
|---|---|---|---|
| Generate RPL | Generate Request Purchase List | + Vote Code | Add Vote Code |
| Verify | Verify record | + Add Item | Add Drug/Non Drug |
| Send for Approval | Send for Approval | Approve | Approve record |
| Reject | Reject record | | |

***Note***

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

## 3.0   Procurement Standard LP

### Overview

Procurement Standard-LP is item supplied by supplier other than Pharmaniaga. Items are purchased based on selected criteria using the system. Purchasing value has a limit in a particular year. Purchasing item via Recommended Purchase List (RPL) is for the routine activity at the main store level. Before using Recommended Purchase List (RPL), the facility has to set a buffer level of minimum and maximum stock level. The system will then calculate the difference in the current stock level and buffer to suggest a list of items that needs to be purchased via Recommended Purchase List (RPL).

### User Group

This module is intended for inventory user at the Pharmacy Store (subject to user assigned by the facility).

### Functional Diagram
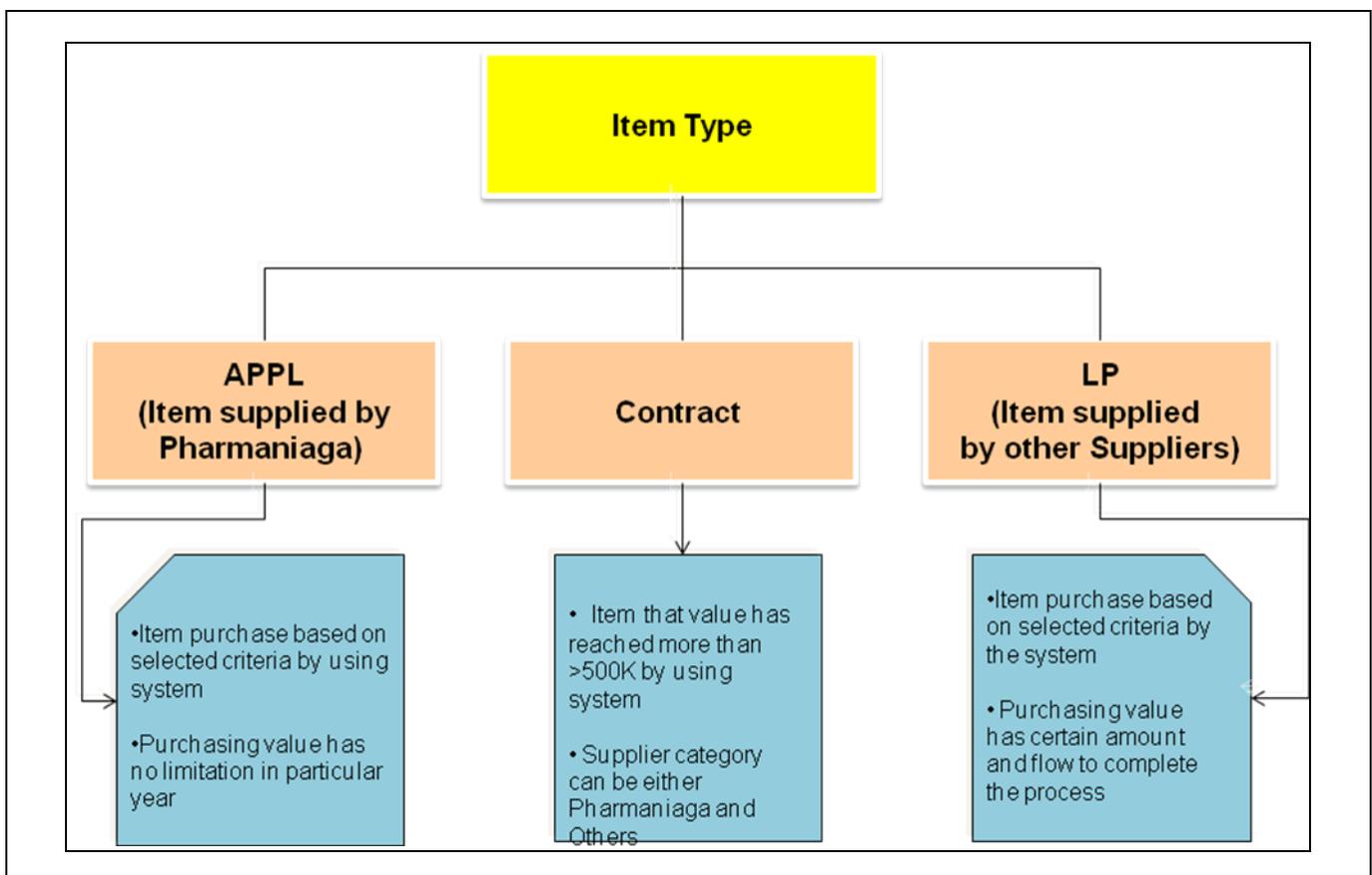


**Figure 3.0-1**

### Functional Description
Slow Moving comprises of three (2) main functions:

- **Recommended Purchase List (RPL)**

- **Purchase Order**

## 3.1 Recommended Purchase List (RPL) Listing Page
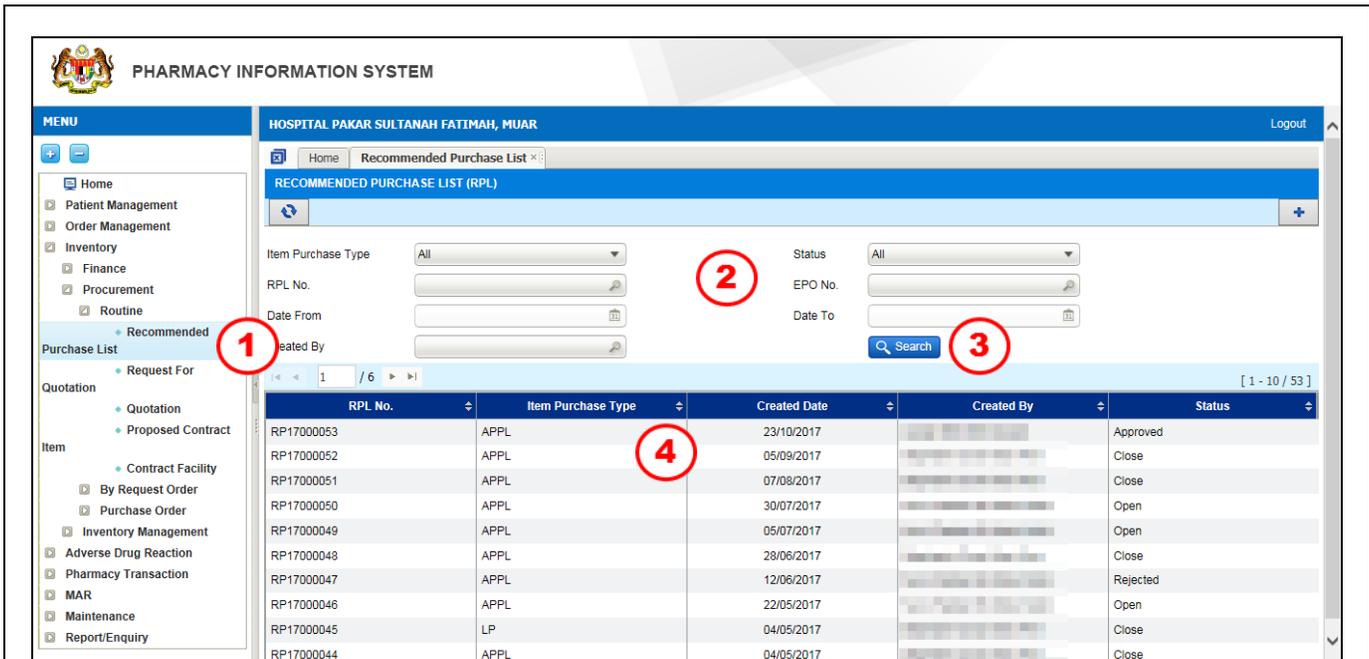


**Figure 3.1-1 Recommended Purchase List (RPL) Listing Page**

Recommended Purchase List (RPL) is a list generated item by the system based under buffer level to help user to proceed with the purchase

**STEP 1**
Click on the 'Inventory' menu followed by 'Procurement' and 'Routine', and select 'Recommended Purchase List'

**STEP 2**
To search for existing Recommended Purchase List (RPL) transaction, these search criteria can be used:

| No | Field | Description | Remark |
|---|---|---|---|
| a | Item Purchase Type | Item Type<br>- All<br>- APPL<br>- Contract<br>- LP | Allow user to search existing transaction based on Item Type |
| b | RPL No. | Search by selecting a number from the RPL | Will be automatically displayed once a RPL no is selected |
| c | ePO No. | Search by selecting a number from the ePO | Will be automatically displayed once a ePO no is selected |
| d | Date from | Search by selecting a date from the calendar | Filter and search existing records based on date. The date format will be 'dd/mm/yyyy'. i.e. 31/12/2015 |
| e | Status | Select Status from the drop down menu:<br>- Open<br>- Approved<br>- Pending for Approval<br>- Cancelled<br>- Pending for Verification | Filter and search existing records based on Status |

| f | Created by | Select created from the drop down menu | Filter and search existing records based on creator |
|---|---|---|---|

**Table 3.1-1**

## STEP 3

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

## ***Note***
*In circumstances of no criteria is input, the entire list of previous transaction will be not displayed.*

## STEP 4
Double click on the selected record and the details will be displayed as figure 3.1-2
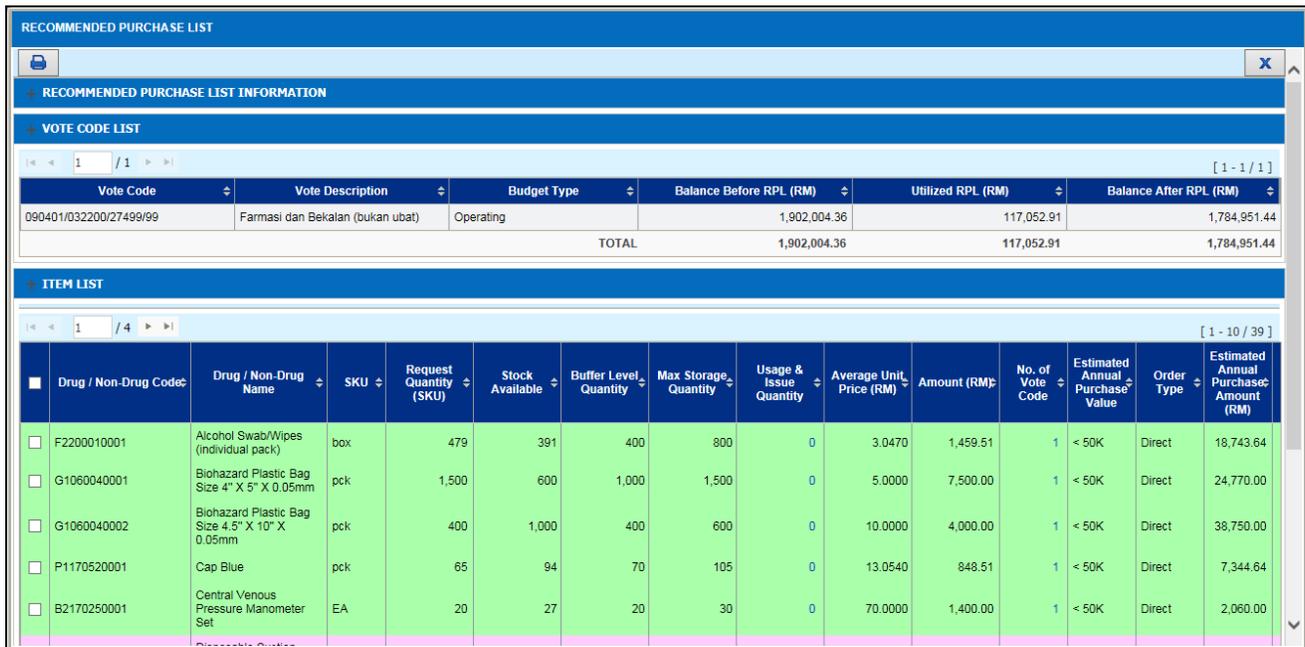


**RECOMMENDED PURCHASE LIST**

**RECOMMENDED PURCHASE LIST INFORMATION**

**VOTE CODE LIST**

| Vote Code | Vote Description | Budget Type | Balance Before RPL (RM) | Utilized RPL (RM) | Balance After RPL (RM) |
|---|---|---|---|---|---|
| 090401/032200/27499/99 | Farmasi dan Bekalan (bukan ubat) | Operating | 1,902,004.36 | 117,052.91 | 1,784,951.44 |
| | | TOTAL | 1,902,004.36 | 117,052.91 | 1,784,951.44 |

**ITEM LIST**

[ 1 - 10 / 39 ]

| ☐ | Drug / Non-Drug Code | Drug / Non-Drug Name | SKU | Request Quantity (SKU) | Stock Available | Buffer Level Quantity | Max Storage Quantity | Usage & Issue Quantity | Average Unit Price (RM) | Amount (RM) | No. of Vote Code | Estimated Annual Purchase Value | Order Type | Estimated Annual Purchase Amount (RM) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | F2200010001 | Alcohol Swab/Wipes (individual pack) | box | 479 | 391 | 400 | 800 | 0 | 3.0470 | 1,459.51 | 1 | < 50K | Direct | 18,743.64 |
| ☐ | G1060040001 | Biohazard Plastic Bag Size 4" X 5" X 0.05mm | pck | 1,500 | 600 | 1,000 | 1,500 | 0 | 5.0000 | 7,500.00 | 1 | < 50K | Direct | 24,770.00 |
| ☐ | G1060040002 | Biohazard Plastic Bag Size 4.5" X 10" X 0.05mm | pck | 400 | 1,000 | 400 | 600 | 0 | 10.0000 | 4,000.00 | 1 | < 50K | Direct | 38,750.00 |
| ☐ | P1170520001 | Cap Blue | pck | 65 | 94 | 70 | 105 | 0 | 13.0540 | 848.51 | 1 | < 50K | Direct | 7,344.64 |
| ☐ | B2170250001 | Central Venous Pressure Manometer Set | EA | 20 | 27 | 20 | 30 | 0 | 70.0000 | 1,400.00 | 1 | < 50K | Direct | 2,060.00 |

**Figure 3.1-2 Recommended Purchase List**

### 3.2 New Recommended Purchase List (RPL): LP

To create new Recommended Purchase List (RPL) transaction for LP, perform the steps below:



**Figure 3.2-1 Recommended Purchase List**

**STEP 1**

Click on the 'Inventory' menu followed by 'Procurement' and 'Routine', and select 'Recommended Purchase List'

**STEP 2**

Click on the [+] button and the Recommended Purchase List screen will be displayed as shown below
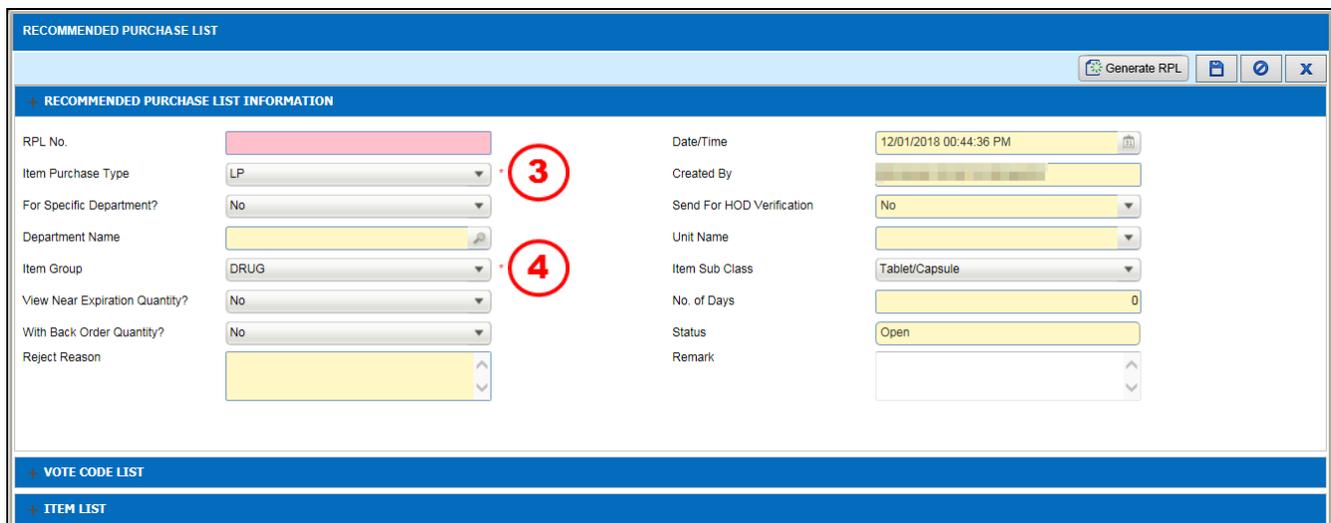


**Figure 3.2-2 Recommended Purchase List**

**STEP 3**

Select **Item Purchase Type** as LP

**STEP 4**
Select Item Group from the drop down box:
- DRUG
- NON DRUG

***Note***
- *User is allowed to select **For Specific Department**. If user select as 'Yes', **Send For HOD Verification** field will be enable.*

- *Refer 3.2.1 and 3.2.2 section for function **For Specific Department** and **Send For HOD Verification.***

- *User is allowed to select **View Near Expiration Quantity?** As 'Yes'. If the selection is 'Yes', user has to enter value in the 'No of Days' field as shown in Figure 3.2-3*

| View Near Expiration Quantity? | Yes ▼ | No. of Days | 30 * |
|---|---|---|---|

**Figure 3.2-3 View Near Expiration Quantity?**

- *User is allowed to select **With Back Order Quantity?** As 'Yes'. Back Order Quantity represents the pending receive quantity that has not been supply yet by the suppliers.*
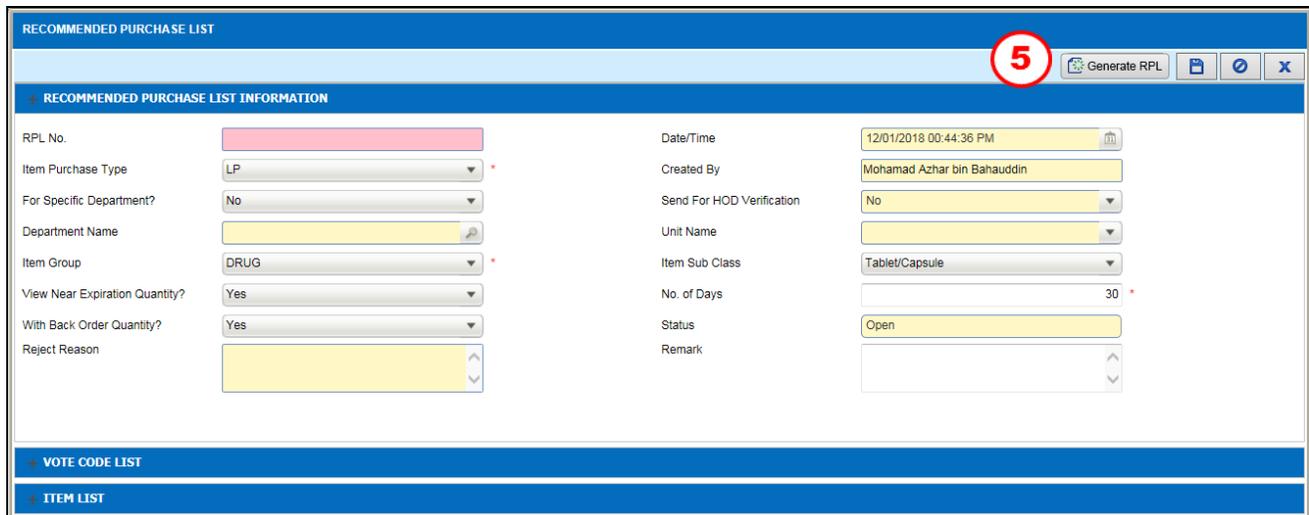


**Figure 3.2-4 Recommended Purchase List**

**STEP 9**
Click on the [Generate RPL] button to generate item based on selection criteria

***Note***
- *System will be able to generate a list of items where the stock's quantity is less than the buffer level quantity as shown in Figure 3.2-6.*

- *Buffer Level Quantity is set up at Item/Product Buffer Level master.*

- *System will be able to cater for 'With Back Order Quantity' that is still not delivered by the Supplier*

- *Vote Code List will contain summary information of Vote Code based on the items list generated from the RPL as shown in Figure 3.2-5.*

**VOTE CODE LIST**

|◄ ◄| 1 | / 1 | ► ►| | | | | [ 1 - 4 / 4 ]

| Vote Code | Vote Description | Budget Type | Balance Before RPL (RM) | Utilized RPL (RM) | Balance After RPL (RM) |
|---|---|---|---|---|---|
| 090401/031200/27401/99 | ENT (Ubat) | Operating | 4.24 | 12,069.46 | -12,065.22 |
| 090401/030700/27401/99 | Obstetik dan Ginekologi (ubat) | Operating | 45.70 | 7,683.98 | -7,638.28 |
| 090401/030500/27401/01 | Perubatan Am (ubat) | Operating | 38.43 | 13,596.80 | -13,558.37 |
| 090401/032700/27401/99 | Psikiatrik (Ubat) | Operating | 265.96 | 4,623.91 | -4,357.95 |
| | | **TOTAL** | 354.33 | 37,974.16 | -37,619.83 |

**Figure 3.2-5 Vote Code List**

<u>Note</u>
***Vote Code List*** *content an information of:*
- *Vote Code*
- *Vote Description*
- *Budget Type*
- *Balance Before RPL (RM)*
- *Utilized RPL (RM)*
- *Balance After RPL (RM)*

**ITEM LIST**

🗑 Delete Item     ➕ Add Item

|◄ ◄| 1 | / 1 | ► ►| | [ 1 - 7 / 7 ]

| ☐ | Drug / Non-Drug Code | Drug / Non-Drug Name | SKU | Request Quantity (SKU) | Stock Available | Buffer Level Quantity | Max Storage Quantity | Usage & Issue Quantity | Back Order | Quantity To Expire | Average Unit Price (RM) | Amount (RM) | No. of Vote Code | Estimated Annual Purchase Value |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | N06AA04110T1001XX | Clomipramine HCl 25mg Tablet | tablet | 1 | 0 | 1 | 1 | 0 | 0 | 0 | 0.6613 | 0.66 | 1 | < 50K |
| ☐ | G03CA57000T1001XX | Conjugated Oestrogens 0.625mg Tablet | tablet | 7,840 | 560 | 5,600 | 8,400 | 0 | 0 | 0 | 0.9801 | 7,683.98 | 1 | < 50K |
| ☐ | R01BA52988T1001XX | Loratadine 5 mg and Pseudoephedrine Sulphate 120 mg Tablet | tablet | 16,000 | 2,000 | 12,000 | 18,000 | 0 | 0 | 0 | 0.7543 | 12,068.80 | 1 | < 50K |
| ☐ | C09DA03935T1001XX | Valsartan 80 mg and Hydrochlorothiazide 12.5 mg Tablet | tablet | 9,156 | 5,964 | 10,080 | 15,120 | 280 | 0 | 0 | 0.8259 | 7,561.94 | 1 | < 50K |
| ☐ | N06AX16110C2001XX | Venlafaxine HCl 75 mg Extended Release Capsule | capsule | 1,148 | 532 | 1,120 | 1,680 | 0 | 0 | 0 | 4.0278 | 4,623.91 | 1 | < 50K |
| ☐ | B01AA03520T1004XX | Warfarin Sodium 5 mg Tablet | tablet | 10,600 | 13,400 | 16,000 | 24,000 | 0 | 0 | 0 | 0.2721 | 2,884.26 | 1 | < 50K |
| ☐ | J05AF01000C1001XX | Zidovudine 100 mg Capsule | capsule | 3,000 | 0 | 2,000 | 3,000 | 0 | 0 | 0 | 1.0502 | 3,150.60 | 1 | < 50K |

**Figure 3.2-6 Item List**

<u>Note</u>
- ***Item List*** *content an information of:*
  - *Drug/Non-Drug Code*
  - *Drug/Non-Drug Name*
  - *SKU*
  - *Request Quantity (SKU)*
  - *Stock Available*
  - *Buffer Level Quantity*
  - *Max Storage Quantity*
  - *Usage & Issue Quantity*
  - *Back Order*
  - *Quantity To Expire*
  - *Average Unit Price (RM)*
  - *Amount (RM)*
  - *Vote Code*
  - *Estimated Annual Purchase Value*
  - *Order Type*

- *Estimated Annual Purchase Amount (RM)*
- *YTD Purchase Amount (RM)*

- *'Estimated Annual Purchase Value' will show the 'Order Type' of the item whether Direct, Quotation or Request for Contract*



**Figure 3.2-7 Item List**

**STEP 6**
Click on the Usage & Issue Quantity hyperlink and Usage Quantity details window will be display as Figure 3.2-8

***Note***
- *There are two category of Usage Quantity:*
  - *Periodic Quantity (refer Figure 3.2-8)*
  - *Accumulated Quantity (refer Figure 3.2-9)*



**Figure 3.2-8 Usage Quantity Details: Periodic Quantity**

**USAGE QUANTITY DETAILS**

| Category | ○ Periodic Quantity ● Accumulated Quantity | |
|---|---|---|
| **Date Range** | **Issue Quantity(SKU)** | **Usage Quantity(SKU)** |
| 12/12/2017 - 12/01/2018 | 0 | 0 |
| 12/11/2017 - 12/01/2018 | 280 | 0 |
| 12/10/2017 - 12/01/2018 | 280 | 0 |
| **Monthly Average** | 93 | 0 |

**Figure 3.2-9 Usage Quantity Details: Accumulated Quantity**

**_Note_**

*Click on the* [ X ] *button to close Usage Quantity Details*

**STEP 7**
Click on the No. of Vote Code and Vote Information window will be display as Figure 3.2-10

**VOTE INFORMATION**

| Vote Description | Vote Code | Budget Type | Request To Purchase Quantity(SKU) |
|---|---|---|---|
| 090401/031200/27401/99 | ENT (Ubat) | Operating | 1 |

**Figure 3.2-10 Vote Information**

**_Note_**

*Click on the* [ X ] *button to close Usage Quantity Details*

**STEP 8**
Double click on the selected item list to view item information as shown in Figure 3.2-11

**Figure 3.2-11 Item Information**

## Note

- *User can view details information of the selected item*

- *User is allowed to edit the Average Unit Price (RM). By editing Average Unit Price (RM) value will impact the total Amount (RM)*

## STEP 9

Click on the [+ Vote Code] button to add Vote Code and Vote Information screen will be display as Figure 3.2-12



**Figure 3.2-12 Vote Information**

## STEP 10
Select **Vote Description** and enter **Request To Purchase Quantity**

## STEP 11

Click on the [💾] button to save the record and confirmation message will be display as Figure 3.2-13

PhIS & CPS Project
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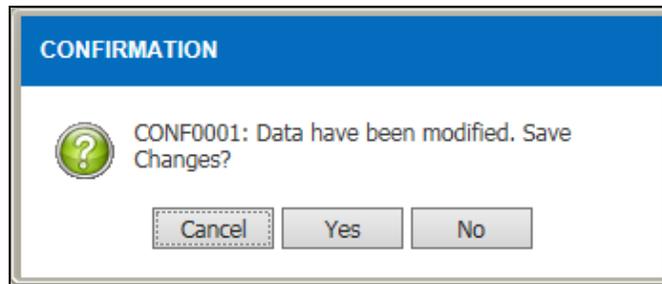
**Figure 3.2-13 Confirmation Message**

*Note*

- *Click on the [Yes] button so save the record*

- *After saved, system will update the information under the Vote Code List section as shown in Figure 3.2-14*



**Figure 3.2-14 Vote Code List**

*Note*
*User is allowed to delete the Vote Code by following the step below:*
- *Check on the check box of the selected Vote Code*

- *Click on the [Delete] button and confirmation message will be display as shown in Figure 3.2-15*
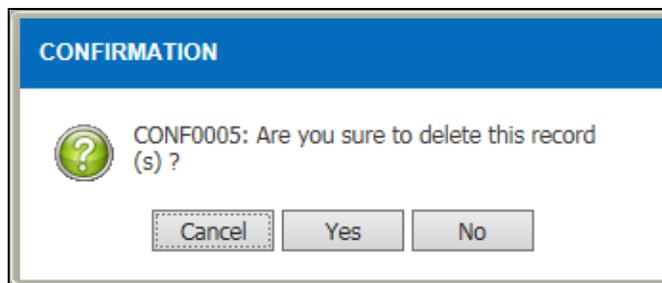


**Figure 3.2-15 Confirmation Message**

- *Click on the [Yes] button and the information of the vote code will be removed from the list*

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**Figure 3.2-16 Item Information**

**STEP 12**

Click on the [X] button to close the screen and confirmation message will be display as Figure 3.2-17



**Figure 3.2-17 Confirmation Message**

***Note***
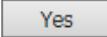
- *Click on the [Yes] button so save the modified record*

- *After save, system will go back to main screen as shown in Figure 3.2-18*

**RECOMMENDED PURCHASE LIST**

Generate RPL | 🖫 | ⊘ | X

**RECOMMENDED PURCHASE LIST INFORMATION**

**VOTE CODE LIST**

|◄ ◄ 1 /1 ► ►|  [ 1 - 4 / 4 ]

| Vote Code | Vote Description | Budget Type | Balance Before RPL (RM) | Utilized RPL (RM) | Balance After RPL (RM) |
|---|---|---|---|---|---|
| 090401/031200/27401/99 | ENT (Ubat) | Operating | 4.24 | 12,069.46 | -12,065.22 |
| 090401/030700/27401/99 | Obstetik dan Ginekologi (ubat) | Operating | 45.70 | 7,683.98 | -7,638.28 |
| 090401/030500/27401/01 | Perubatan Am (ubat) | Operating | 38.43 | 13,596.80 | -13,558.37 |
| 090401/032700/27401/99 | Psikiatrik (Ubat) | Operating | 265.96 | 4,623.91 | -4,357.95 |
| | | TOTAL | 354.33 | 37,974.16 | -37,619.83 |

⑬

**ITEM LIST**

🗑 Delete Item | ➕ Add Item

|◄ ◄ 1 /1 ► ►|  [ 1 - 7 / 7 ]

| ☐ | Drug / Non-Drug Code | Drug / Non-Drug Name | SKU | Request Quantity (SKU) | Stock Available | Buffer Level Quantity | Max Storage Quantity | Usage & Issue Quantity | Back Order | Quantity To Expire | Average Unit Price (RM) | Amount (RM) | No. of Vote Code | Estimated Annual Purchase Value |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | N06AA04110T1001XX | Clomipramine HCl 25mg Tablet | tablet | 1 | 0 | 1 | 1 | 0 | 0 | 0 | 0.6613 | 0.66 | 1 | < 50K |
| ☐ | G03CA57000T1001XX | Conjugated Oestrogens 0.625mg Tablet | tablet | 7,840 | 560 | 5,600 | 8,400 | 0 | 0 | 0 | 0.9801 | 7,683.98 | 1 | < 50K |
| ☐ | R01BA52988T1001XX | Loratadine 5 mg and Pseudoephedrine Sulphate 120 mg Tablet | tablet | 16,000 | 2,000 | 12,000 | 18,000 | 0 | 0 | 0 | 0.7543 | 12,068.80 | 1 | < 50K |
| ☐ | C09DA03935T1001XX | Valsartan 80 mg and Hydrochlorothiazide 12.5 mg Tablet | tablet | 9,156 | 5,964 | 10,080 | 15,120 | 280 | 0 | 0 | 0.8259 | 7,561.94 | 1 | < 50K |
| ☐ | N06AX16110C2001XX | Venlafaxine HCl 75 mg Extended Release Capsule | capsule | 1,148 | 532 | 1,120 | 1,680 | 0 | 0 | 0 | 4.0278 | 4,623.91 | 1 | < 50K |
| ☐ | B01AA03520T1004XX | Warfarin Sodium 5 mg Tablet | tablet | 10,600 | 13,400 | 16,000 | 24,000 | 0 | 0 | 0 | 0.2721 | 2,884.26 | 1 | < 50K |
| ☐ | J05AF01000C1001XX | Zidovudine 100 mg Capsule | capsule | 3,000 | 0 | 2,000 | 3,000 | 0 | 0 | 0 | 1.0502 | 3,150.60 | 1 | < 50K |

**Figure 3.2-18 Recommended Purchase List**

**STEP 13**

Click on the ➕ Add Item button to add additional item to be purchased and Add Item screen will be display as Figure 3.2-19

**ADD ITEM**

ⓘ  ⑰ 🖫 ⊘ X

| | | | |
|---|---|---|---|
| Item Group | DRUG ▼ | Item Sub-group | Tablet/Capsule |
| Drug Name | Clomipramine HCl 25mg Tablet 🔍 ⑭ | Drug Code | N06AA04110T1001XX |
| Vote Description | ⑮ ENT (Ubat) 🔍 * | Vote Code | 090401/031200/27401/99 |
| Request To Purchase Quantity | 1 * ⑯ | Stock Available | 0 |
| Unit Price (RM) | 0.6613 | SKU | tablet |
| Amount (RM) | 0.66 | Max Storage Quantity | 1 |
| Usage Quantity | 0 | Estimation Price (RM) | 11,090.1354 |
| Buffer Level Quantity | 1 | | |

**Figure 3.2-19 Add Item**

**STEP 14**
Select **Drug Name**

**STEP 15**
Select **Vote Description**

*Note*
- **Drug Name** *will display drug that is above buffer level.*

- *System will auto calculate* **Request To Purchase Quantity** *and user is allowed to edit the value.*

- **Unit Price** *will be automatically display and user is allowed to edit the value.*

**STEP 16**
Enter **Request To Purchase Quantity** if necessary

**STEP 17**

Click on the [💾] button to save the record and confirmation message will be display as Figure 3.2-20
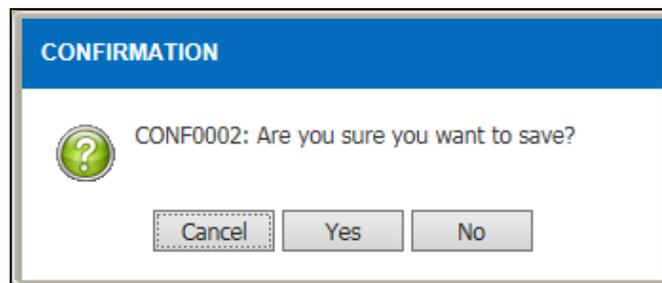


**Figure 3.2-20 Confirmation Message**
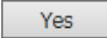
*Note*
- *Click on the* [ Yes ] *button to save record*

- *After saved, the record will be updated on the Item List*
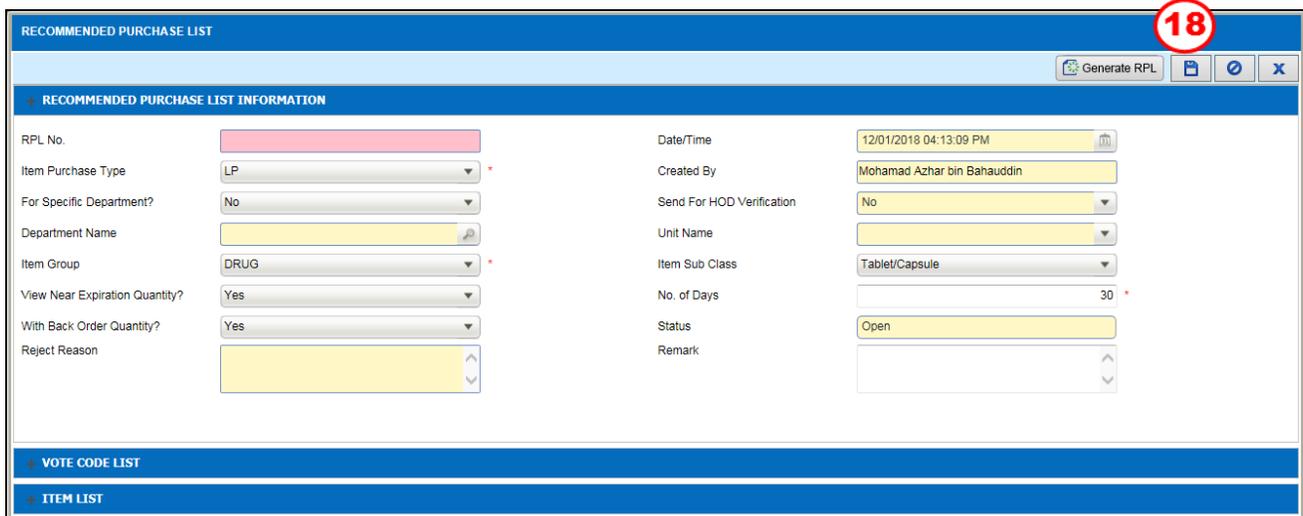


**Figure 3.2-21 Recommended Purchase List**

**STEP 18**

Click on the [💾] button to save the RPL transaction and information message will be display as Figure 3.2-22
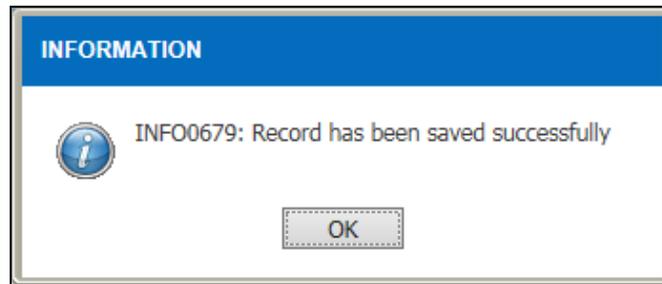
**Figure 3.2-22 Information Message**

***Note***

- *Click on the* OK *button to successfully save the record*

- ***RPL No*** *will be auto generated after successfully saved the record*

- *Button* 👍 Approve *,* 👎 Reject *and* Cancel Request *will be enable after successfully saved the record as shown in Figure 3.2-23*
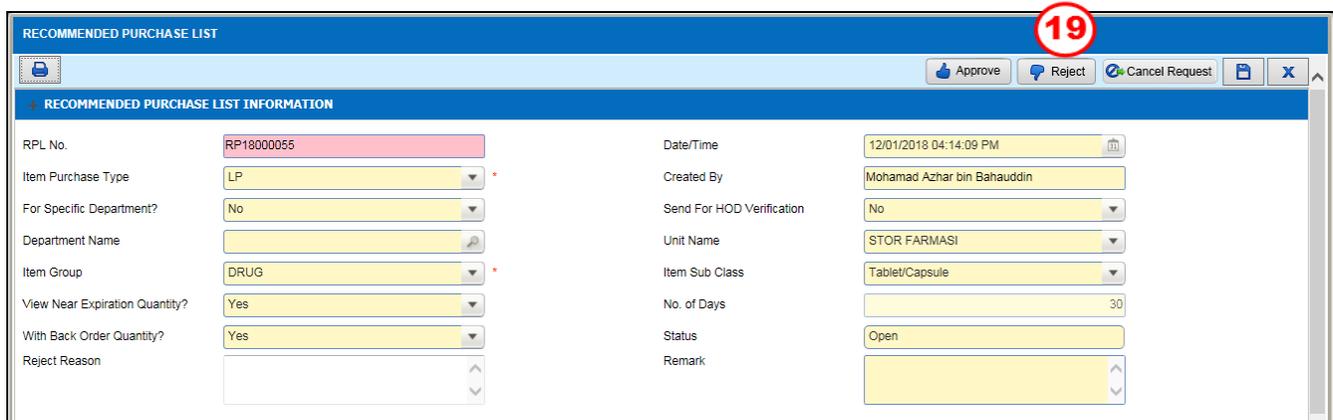


**Figure 3.2-23 Recommended Purchase List**

**STEP 19**

a) Click on the 👍 Approve button to approve the record and confirmation message will be display as Figure 3.2-24
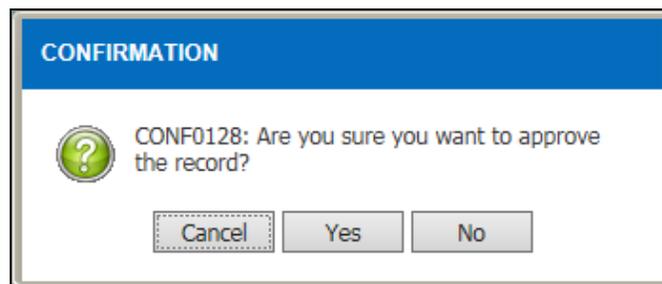


**Figure 3.2-24 Confirmation Message**

***Note***
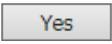
- *Click on the* Yes *button to approved record and information message will be display as Figure 3.2-25*
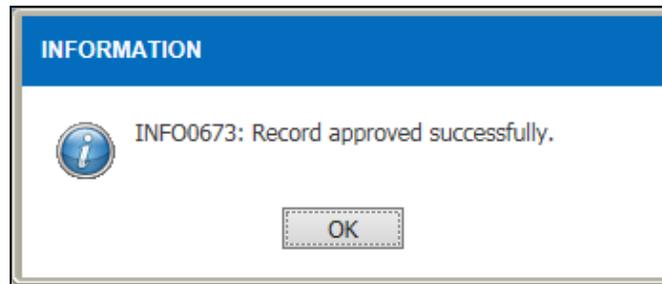
**Figure 3.2-25 Information Message**

*Note*

- *Click on the* OK *button to successfully approved the record*

b) Click on the Reject button to reject the record and confirmation message will be display as Figure 3.2-26

*Note*

*User need to enter* **Reject Reason** *before click on the* Reject *button*
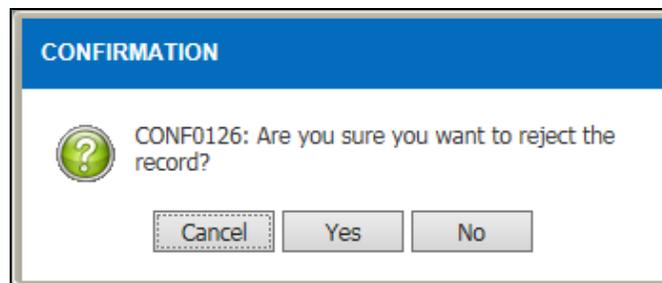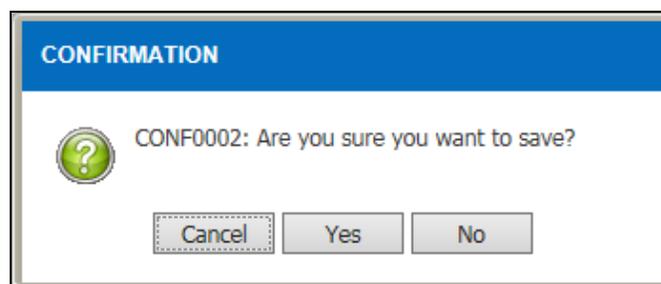


**Figure 3.2-26 Confirmation Message**

*Note*

- *Click on the* Yes *button to reject record and information message will be display as Figure 3.2-27*
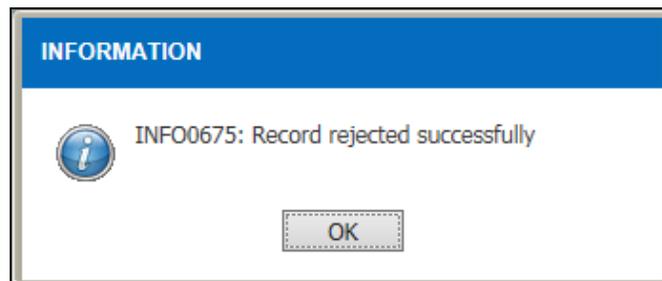


**Figure 3.2-27 Information Message**

*Note*

- *Click on the* OK *button to successfully rejected the record*

c) Click on the [Cancel Request] button to cancel the record and confirmation message will be display as Figure 3.2-28
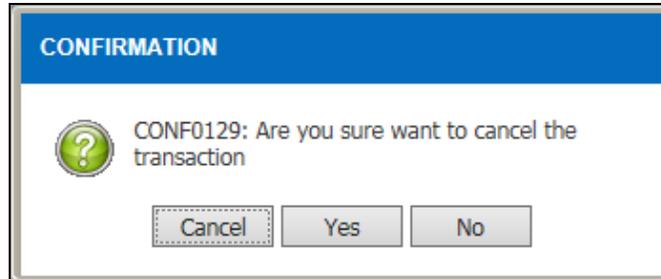


**Figure 3.2-28 Confirmation Message**

*Note*
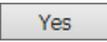
*Click on the [Yes] button to cancel the transaction*

### 3.3 Purchase Order
#### 3.3.1 Purchase Order Listing Page
To view existing Purchase order Record, perform the steps below:
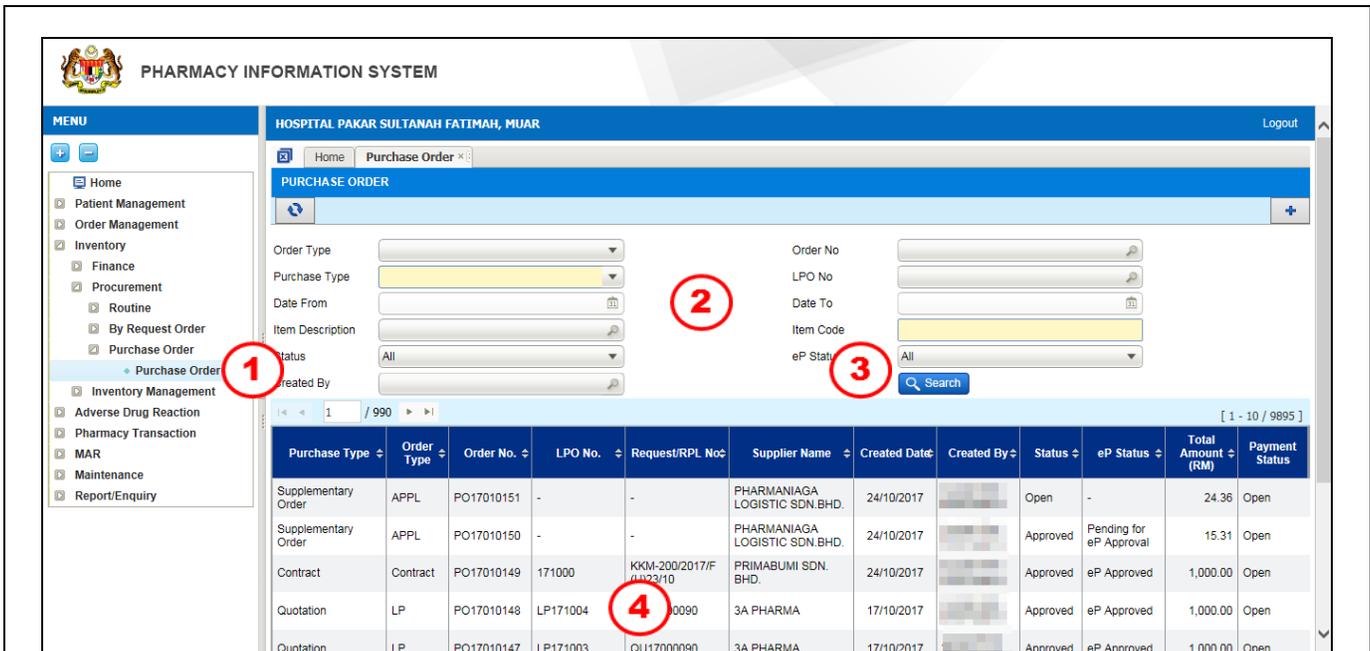


**Figure 3.3.1-1 Purchase Order Listing Page**

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

**STEP 2**
To search for existing Purchase Order transaction, these search criteria can be used:

| No | Field | Description | Remark |
|---|---|---|---|
| a | Order Type | Order Type<br>All<br>APPL<br>LP<br>Contract | Allow user to search existing Purchase Order record based on the 'Order Type' |
| b | Order No. | Order No generated after user save the Purchase Order transaction | Allow user to search existing Purchase Order record based on the 'Order No.' |
| c | LPO No. | LPO No. will be retrieved automatically by the system from eP for AP PO and is entered manually by user for LP PO and Contract PO | Will be automatically displayed once a EPO No. is selected |
| d | Date From | Select 'Date From' from the calendar | Filter and search existing records based on date. The date format will be 'DD/MM/YYYY'. i.e. 31/12/2015 |
| f | Date To | Select 'Date To' from the calendar | Filter and search existing records based on date. The date format will be 'DD/MM/YYYY'. i.e. 31/12/2015 |
| g | Item Description | Select by Item Description | Allow user to search existing Purchase Order record(s) based on the 'Item Description' |

| | | | |
|---|---|---|---|
| h | Status | Select Status from the drop down menu:<br>All<br>Approved<br>Cancelled<br>Cancelled LPO<br>Cancelled Order<br>Closed<br>LPO Cancelled By eP<br>Open<br>Pending for Approval<br>Rejected | Filter and search existing records based on 'Status' |
| i | eP Status | Select eP Status from the drop down menu:<br>All<br>Pending for eP Approval<br>eP Approved<br>eP Cancelled<br>eP Rejected | Filter and search existing records based on 'eP Status' |
| j | Created By | Filter and search for record by entering User First Name and/or User Last Name | Filter and search existing records based on 'Created By' |

**Table 3.3.1-1**

**STEP 3**

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

**STEP 4**
Double click on the selected record and the details will be displayed as figure 3.3.1-2
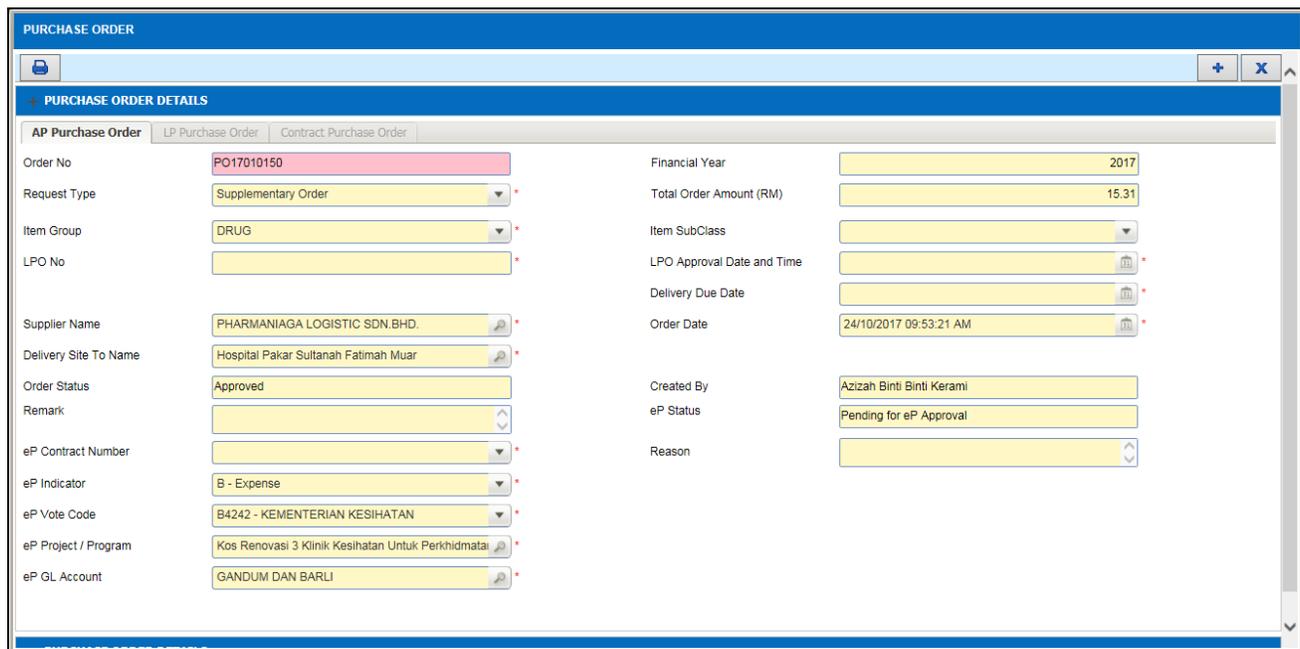


**PURCHASE ORDER**

**PURCHASE ORDER DETAILS**

AP Purchase Order | LP Purchase Order | Contract Purchase Order

| | | |
|---|---|---|
| Order No | PO17010150 | |
| Request Type | Supplementary Order | |
| Item Group | DRUG | |
| LPO No | | |
| Supplier Name | PHARMANIAGA LOGISTIC SDN.BHD. | |
| Delivery Site To Name | Hospital Pakar Sultanah Fatimah Muar | |
| Order Status | Approved | |
| Remark | | |
| eP Contract Number | | |
| eP Indicator | B - Expense | |
| eP Vote Code | B4242 - KEMENTERIAN KESIHATAN | |
| eP Project / Program | Kos Renovasi 3 Klinik Kesihatan Untuk Perkhidmatai | |
| eP GL Account | GANDUM DAN BARLI | |

| | |
|---|---|
| Financial Year | 2017 |
| Total Order Amount (RM) | 15.31 |
| Item SubClass | |
| LPO Approval Date and Time | |
| Delivery Due Date | |
| Order Date | 24/10/2017 09:53:21 AM |
| Created By | Azizah Binti Binti Kerami |
| eP Status | Pending for eP Approval |
| Reason | |

**Figure 3.3.1-2 Purchase Order Listing Page**

### 3.3.2 New Purchase Order LP Direct Purchase: RPL
To create new Purchase Order LP Direct Purchase for RPL, perform the steps below:



**Figure 3.3.2-1 LP Purchase Order**

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

**STEP 2**
Click on the [+] button and the Purchase Order screen will be displayed.



**Figure 3.3.2-2 LP Purchase Order**

**STEP 3**
Select 'LP Purchase Order' tab

**Figure 3.3.2-3 LP Purchase Order**

**STEP 4**
Select on **Purchase Type** as Direct Purchase

**STEP 5**
Select **Request Type** as RPL

**STEP 6**
Select **RPL No**

**STEP 7**
Select **Supplier Name**

**Note**
**Delivery Site To Name** *will be default to the facility Delivery Site to Name.*

**STEP 8**

Click on the [+ Add Item] button to add item to be procure and Add Purchase Order Item screen will be display as Figure 3.3.2-4

**Figure 3.3.2-4 Add Purchase Order Item**

**STEP 9**
Select *Item Description* and Search Item Description window will be display as Figure 3.3.2-5



**Figure 3.3.2-5 Search Item Description**

**_Note_**

- *List of item display is the list from approved RPL*

- *Click on the selected item*

**Figure 3.3.2-6 Add Purchase Order Item**

## Note

- **Vote Description** will be display after selecting **Item Description** and user is allowed to change the **Vote Description.**

- **Order Quantity** will be display value based on the approved quantity at RPL stage.

- **Brand** and **Manufacturer** will be based on the selected **Item Description** and user is allowed to change the value. If there is no value for **Brand** and **Manufacturing**, user needs to select from the drop down box.

**STEP 10**
Enter **Unit Price (RM) (PKU)**

**STEP 11**

Click on the [💾] button to save the record and confirmation message will be display as Figure 3.3.2-7



**Figure 3.3.2-7 Confirmation Message**

## Note
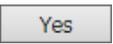
Click on the [ Yes ] button to save the record and information message will be display as Figure 3.3.2-8

**Figure 3.3.2-8 Information Message**

<u>*Note*</u>

*Click on the* [ OK ] *button to successfully saved the record and the details will be appeared on Purchase Order Details as shown in the Figure 3.3.2-9*



**Figure 3.3.2-9 LP Purchase Order**

<u>*Note*</u>

- *To add more items to purchase, please repeat form STEP 8 to STEP 11.*

- *User is allowed to delete the list of Purchase Order Details by click on the check box then click the* [ Delete Item ] *button.*

- *User can view the vote code in the section Vote Code List as shown in figure 3.3.2-10*



**Figure 3.3.2-10 Vote Code List**

**Figure 3.3.2-11 LP Purchase Order**

**STEP 12**

Click on the [💾] button to save the record and confirmation message will be display as Figure 3.3.2-12
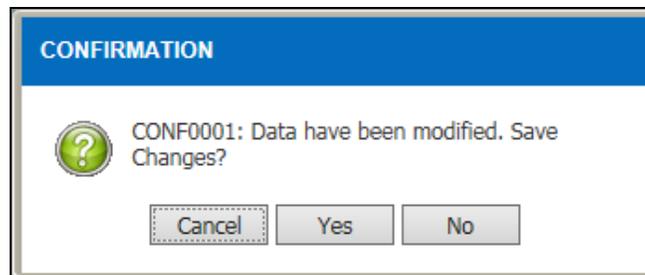


**Figure 3.3.2-12 Confirmation Message**

***Note***
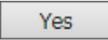
*Click on the [Yes] button to save the record and information message will be display as Figure 3.3.2-13*
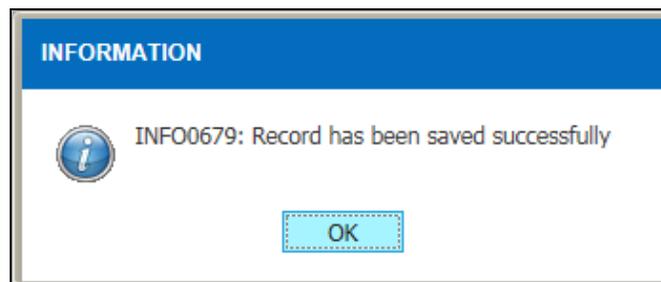


**Figure 3.3.2-13 Information Message**

***Note***

- *Click on the [OK] button to successfully save the record*

- **Order No** will be auto generated after successfully saved the record
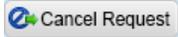
- **Button** Approve , Reject and Cancel Request will be enable after successfully saved the record as shown in Figure 3.3.2-14
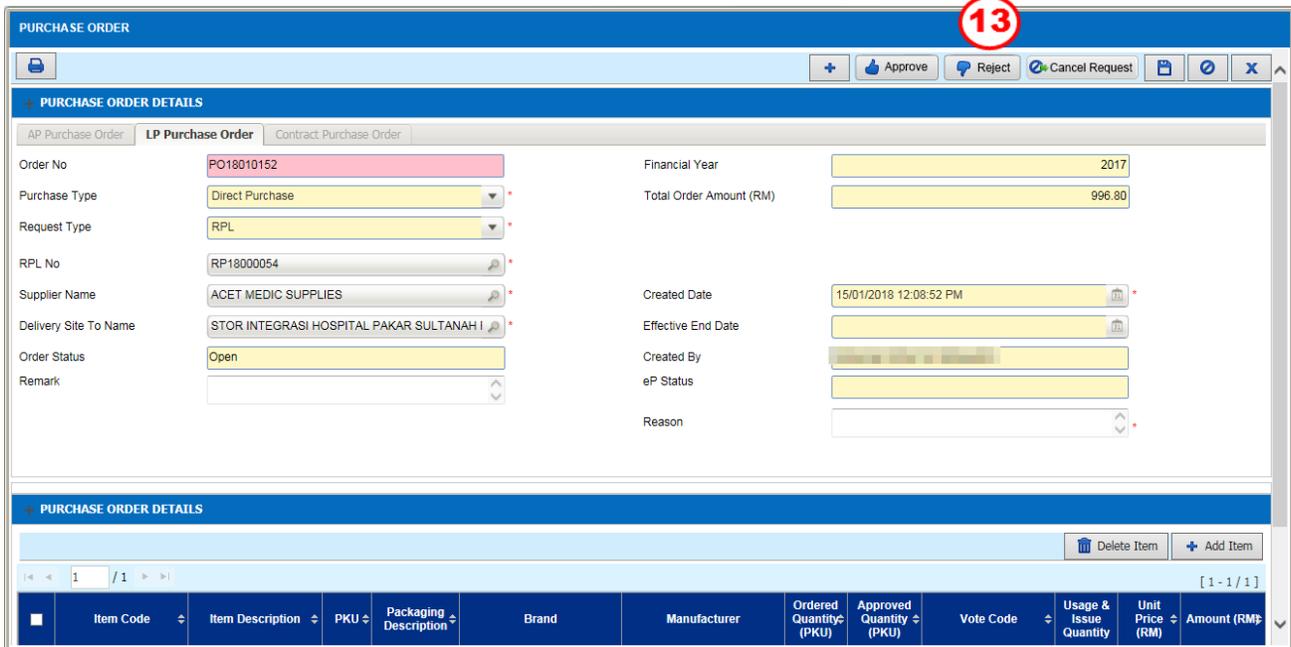


**Figure 3.3.2-14 LP Purchase Order**

**STEP 13**
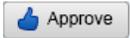
a) Click on the Approve button to approve the record and confirmation message will be display as Figure 3.3.2-15
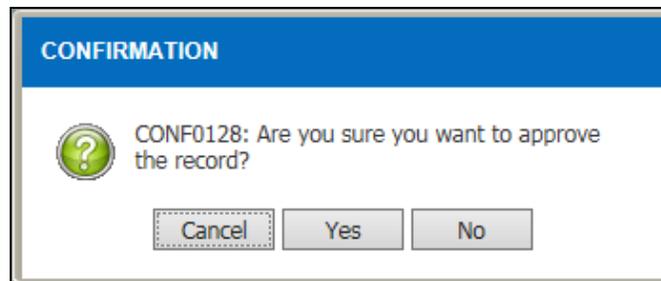


**Figure 3.3.2-15 Confirmation Message**

**Note**
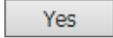
- Click on the Yes button to approved record and information message will be display as Figure 3.3.2-16
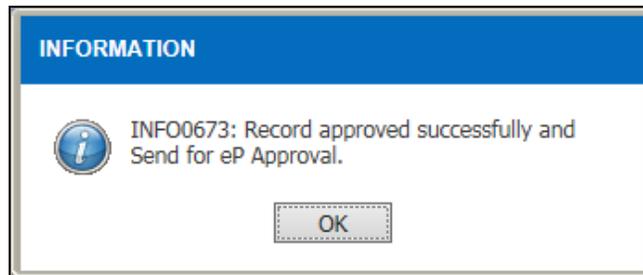
**Figure 3.3.2-16 Information Message**

*Note*
- *Click on the* [OK] *button to successfully approved the record*


b) Click on the [Reject] button to reject the record and confirmation message will be display as Figure 3.3.2-17

*Note*
User need to enter **Reject Reason** before click on the [Reject] button
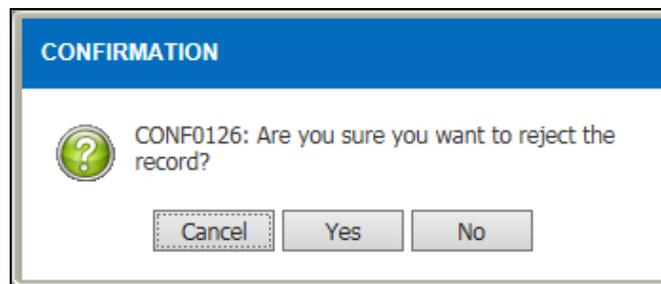


**Figure 3.3.2-17 Confirmation Message**
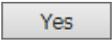
*Note*
- *Click on the* [Yes] *button to reject record and information message will be display as Figure 3.3.2-18*
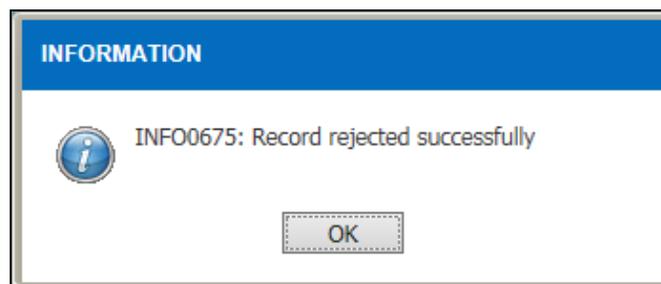


**Figure 3.3.2-18 Information Message**
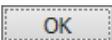
*Note*
- *Click on the* [OK] *button to successfully rejected the record*

c) Click on the [Cancel Request] button to cancel the record and confirmation message will be display as Figure 3.3.2-19

**CONFIRMATION**

CONF0129: Are you sure want to cancel the transaction

Cancel    Yes    No
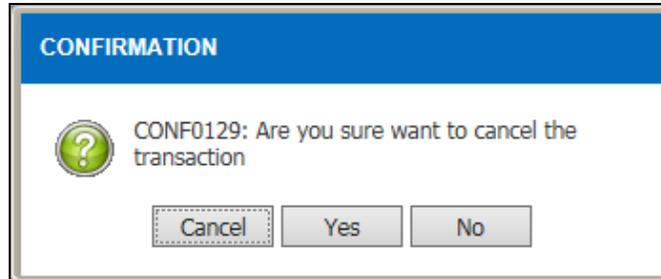
**Figure 3.3.2-19 Confirmation Message**

**_Note_**
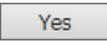
_Click on the_ [Yes] _button to cancel the transaction_

### 3.3.3 New Purchase Order LP Direct Purchase: Supplementary

To create new Purchase Order LP Direct Purchase for Supplementary, perform the steps below:



**Figure 3.3.3-1 LP Purchase Order**

**STEP 1**

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

**STEP 2**

Click on the [+] button and the Purchase Order screen will be displayed.



**Figure 3.3.3-2 LP Purchase Order**

**STEP 3**

Select 'LP Purchase Order' tab

**Figure 3.3.3-3 LP Purchase Order**

**STEP 4**
Select on *Purchase Type* as Direct Purchase

**STEP 5**
Select *Request Type* as Supplementary Order

**STEP 6**
Select *Item Group*
- Drug
- Non-Drug

***Note***
*Select **Item SubClass** if required*

**STEP 7**
Select *Supplier Name*

***Note***
***Delivery Site To Name** will be default to the facility Delivery Site to Name.*

**STEP 8**

Click on the [+ Add Item] button to add item to be procure and Add Purchase Order Item screen will be display as Figure 3.3.3-4

**Figure 3.3.3-4 LP Add Purchase Order Details**

**STEP 9**
Select *Item Description* and Search Item Description window will be display as Figure 3.3.3-5



**Figure 3.3.3-5 Search Item Description**

<u>***Note***</u>
- *List of item display is the list from the Item/Product Buffer Level*

- *Click on the selected item*
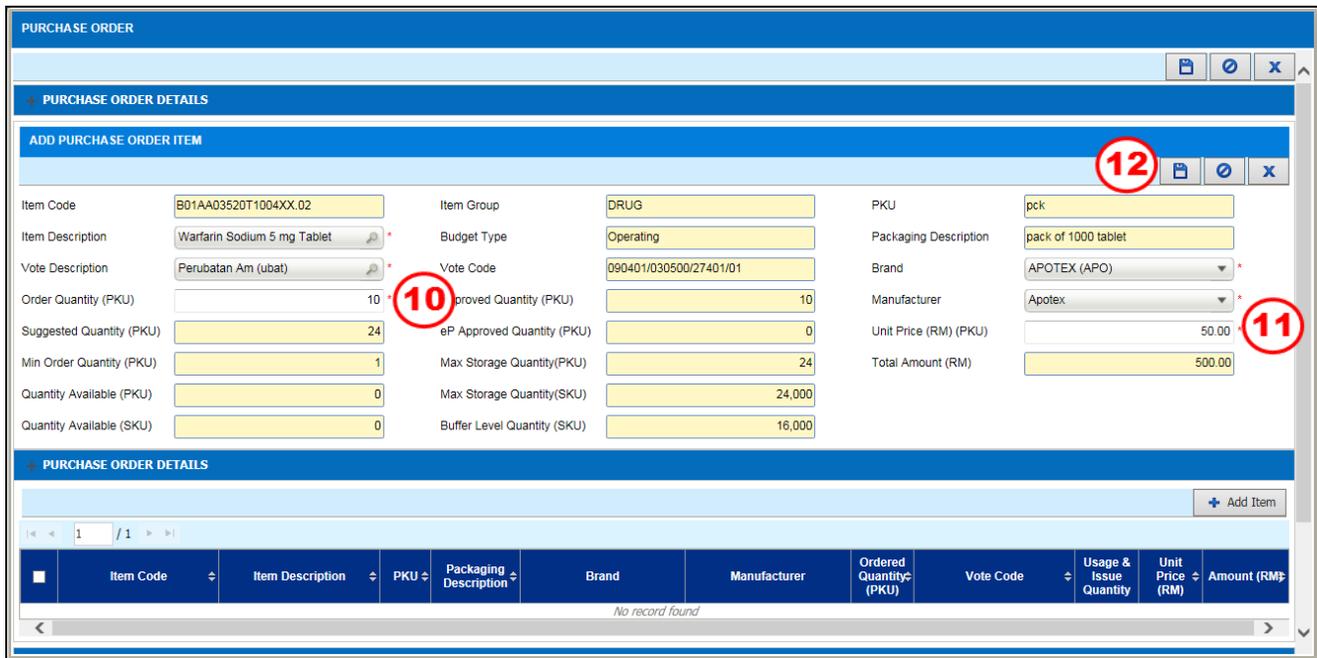
**Figure 3.3.3-6 LP Add Purchase Order Details**

*Note*
- *Vote Description will be display after selecting **Item Description** and user is allowed to change the **Vote Description.***

- *Brand and **Manufacturer** will be based on the selected **Item Description** and user is allowed to change the value. If there is no value for **Brand** and **Manufacturing**, user needs to select from the drop down box.*

**STEP 10**
Enter **Order Quantity (PKU)**

**STEP 11**
Enter **Unit Price (RM) (PKU)**

**STEP 12**

Click on the [icon] button to save the record and confirmation message will be display as Figure 3.3.3-7
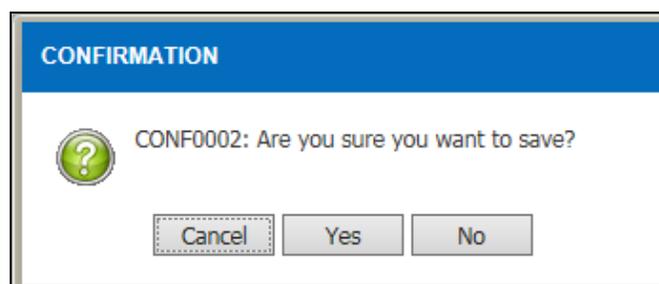


**Figure 3.3.3-7 Confirmation Message**

*Note*
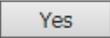
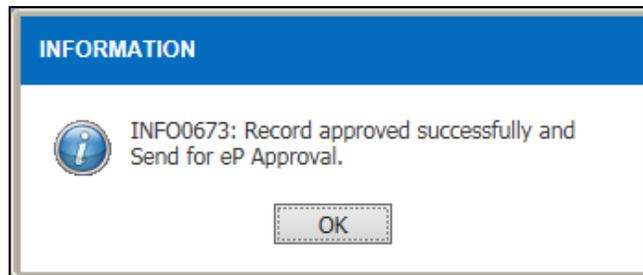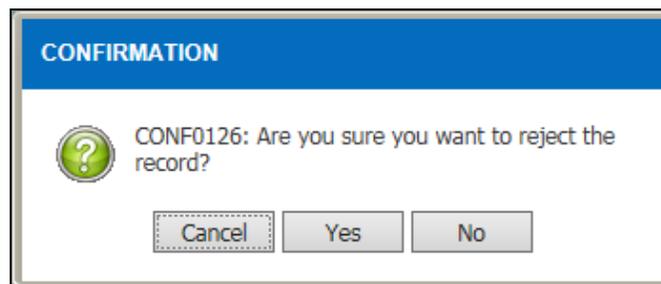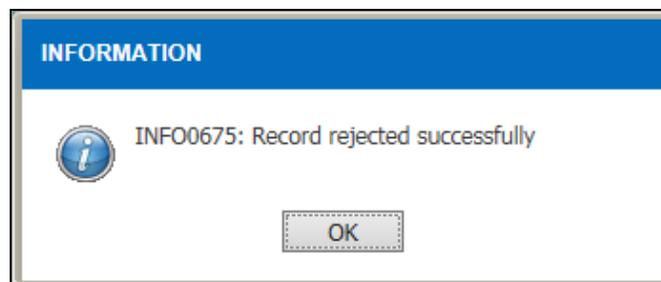Click on the [Yes] button to save the record and information message will be display as Figure 3.3.3-8
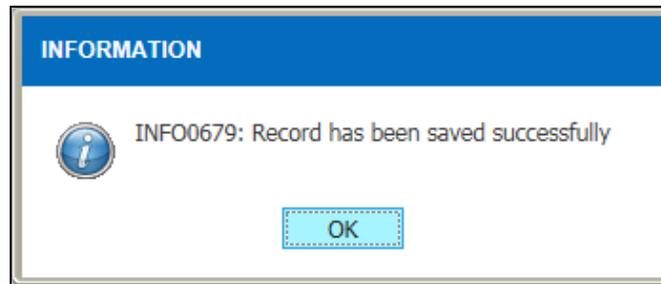
**Figure 3.3.3-8 Information Message**
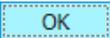
***Note***

*Click on the* **OK** *button to successfully saved the record and the details will be appeared on Purchase Order Details as shown in the Figure 3.3.3-9*
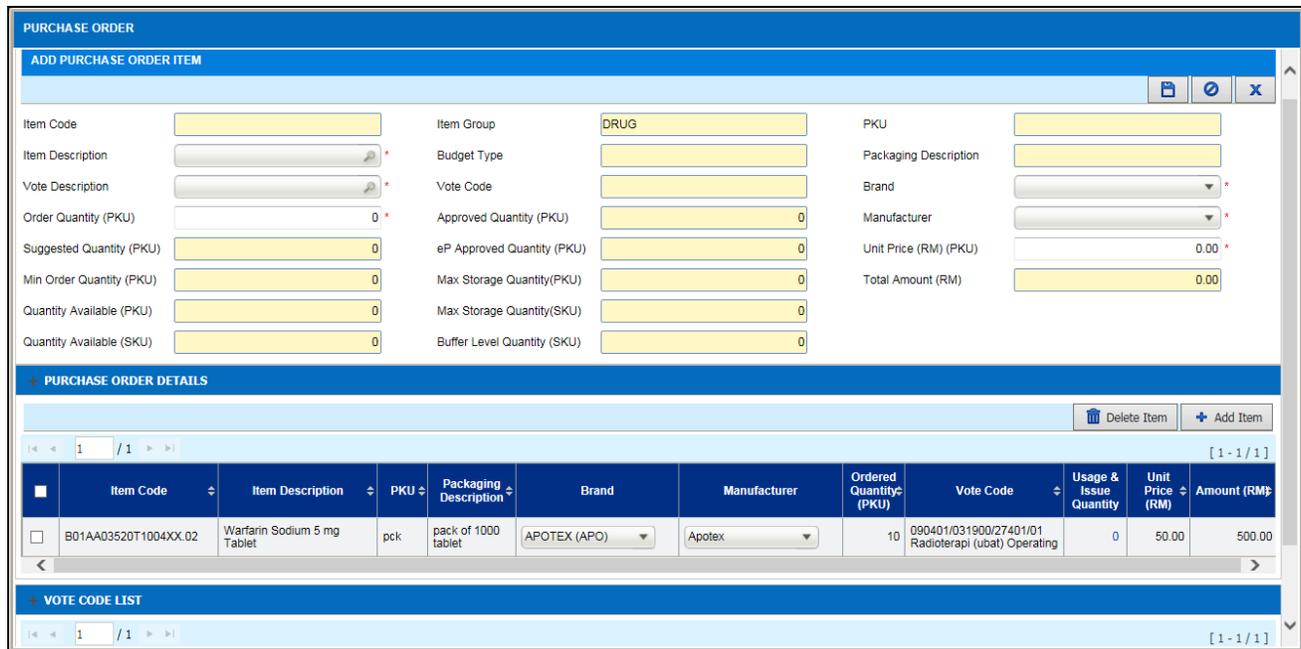


**Figure 3.3.3-9 Purchase Order Details**

***Note***

- *To add more items to purchase, please repeat form STEP 8 to STEP 12.*

- *User is allowed to delete the list of Purchase Order Details by click on the check box then click the* **Delete Item** *button.*

- *Click on the* **X** *button to close the Add Purchase Order Details screen*

- *User can view the vote code in the section Vote Code List as shown in figure 3.3.3-10*

**Figure 3.3.3-10 Vote Code List**



**Figure 3.3.3-11 LP Purchase Order**

**STEP 13**

Click on the [💾] button to save the record and confirmation message will be display as Figure 3.3.3-12



**Figure 3.3.3-12 Confirmation Message**

**_Note_**
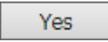
_Click on the [Yes] button to save the record and information message will be display as Figure 3.3.3-13_
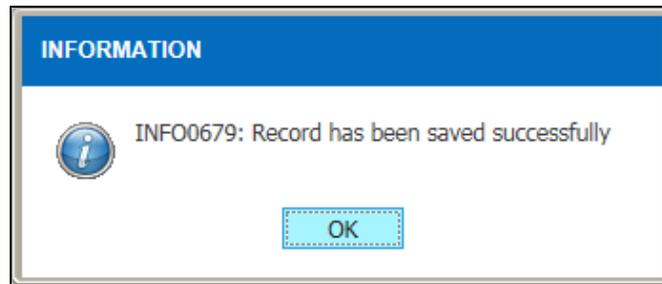
**Figure 3.3.3-13 Information Message**

## Note

- *Click on the* OK *button to successfully save the record*

- ***Order No*** *will be auto generated after successfully saved the record*

- *Button* Approve *,* Reject *and* Cancel Request *will be enable after successfully saved the record as shown in Figure 3.3.3-14*
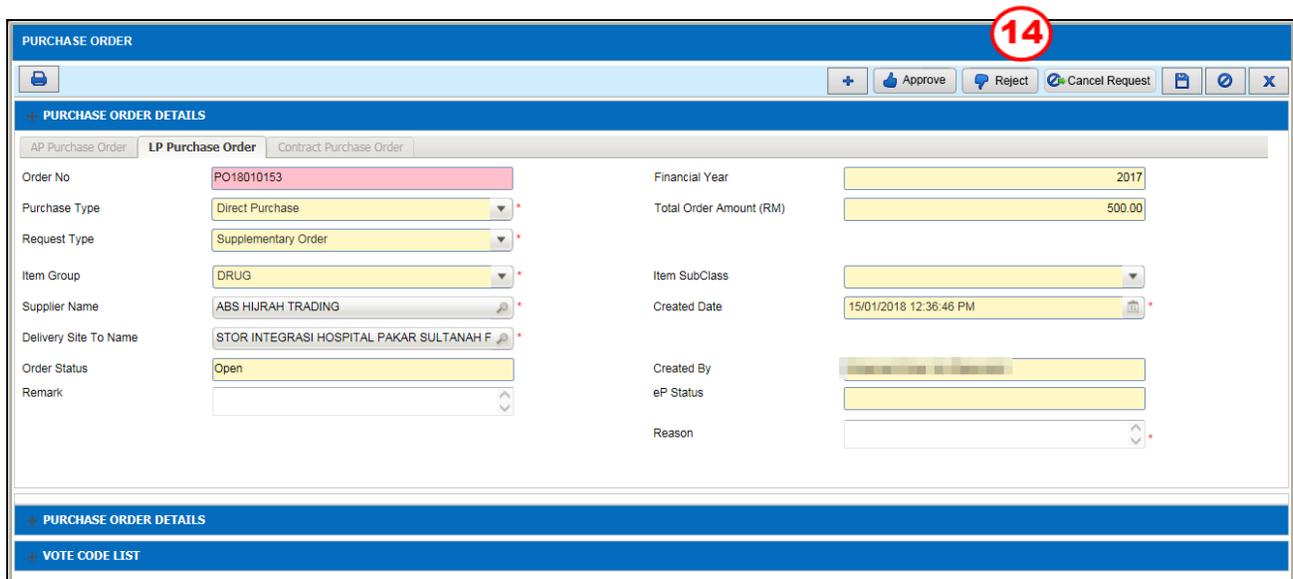


**Figure 3.3.3-14 LP Purchase Order**

## STEP 14

a) Click on the Approve button to approve the record and confirmation message will be display as Figure 3.3.3-15
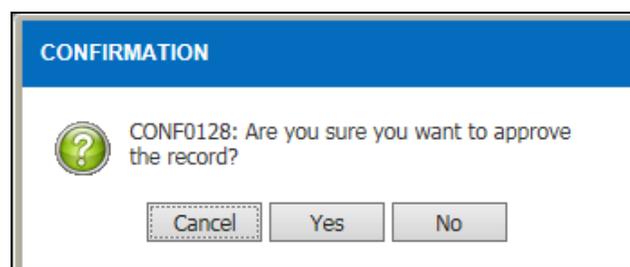


**Figure 3.3.3-15 Confirmation Message**

*Note*
- *Click on the* <kbd>Yes</kbd> *button to approved record and information message will be display as Figure 3.3.3-16*



**Figure 3.3.3-16 Information Message**

*Note*
- *Click on the* <kbd>OK</kbd> *button to successfully approved the record*

b)  Click on the <kbd>⚑ Reject</kbd> button to reject the record and confirmation message will be display as Figure 3.3.3-17

*Note*

User need to enter **Reject Reason** before click on the <kbd>⚑ Reject</kbd> button



**Figure 3.3.3-17 Confirmation Message**

*Note*
- *Click on the* <kbd>Yes</kbd> *button to reject record and information message will be display as Figure 3.3.3-18*



**Figure 3.3.3-18 Information Message**

*Note*
- *Click on the* <kbd>OK</kbd> *button to successfully rejected the record*

c) Click on the [Cancel Request] button to cancel the record and confirmation message will be display as Figure 3.3.3-19
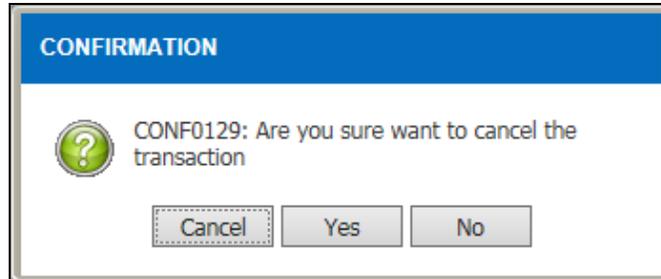


**Figure 3.3.3-19 Confirmation Message**

*Note*
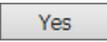
*Click on the [Yes] button to cancel the transaction*

### 3.3.4 New Purchase Order LP Direct Purchase: Indent

To create new Purchase Order LP Direct Purchase for Indent, perform the steps below:



**Figure 3.3.4-1 LP Purchase Order**

**STEP 1**

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

**STEP 2**

Click on the [+] button and the Purchase Order screen will be displayed.



**Figure 3.3.4-2 LP Purchase Order**

**STEP 3**

Select 'LP Purchase Order' tab

**Figure 3.3.4-3 LP Purchase Order**

**STEP 4**
Select on **Purchase Type** as Direct Purchase

**STEP 5**
Select **Request Type** as Indent

**STEP 6**
Select **External Indent No**

**Note**
After selecting **External Indent No**, the list of item will be display at the Purchase Order Details section as shown in Figure 3.3.4-4

**STEP 7**
Select **Supplier Name**

**STEP 7**
Select **Delivery Site To Name**

**Figure 3.3.4-4 Purchase Order Details**

**STEP 9**
Double click on the list of item to update the necessary information



**Figure 3.3.4-5 Add Purchase Order Item**

**STEP 10**
Select *Vote Description*

***Note***
- ***Order Quantity*** *will be display value based on the external indent*

- *Brand* and *Manufacturer* will be based on the selected *Item Description* and user is allowed to change the value. If there is no value for *Brand* and *Manufacturing*, user needs to select from the drop down box.

**STEP 11**
Enter *Unit Price (RM) (PKU)*

**STEP 12**
Click on the [icon] button to save the record and confirmation message will be display as Figure 3.3.4-6
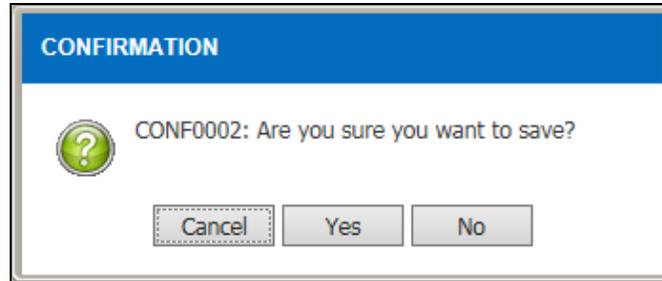


**Figure 3.3.4-6 Confirmation Message**
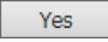
<u>*Note*</u>
Click on the [Yes] button to save the record and information message will be display as Figure 3.3.4-7
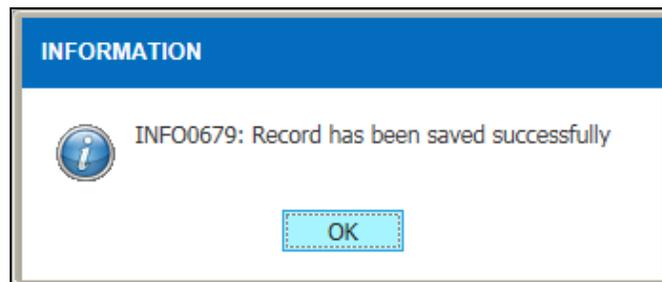


**Figure 3.3.4-7 Information Message**

<u>*Note*</u>
- *Click on the [OK] button to successfully save the record.*

- *User is allowed to delete the list of Purchase Order Details by click on the check box then click the [Delete Item] button.*

- *Repeat from STEP 9 to STEP 12 for updating the order information.*

- *Click on the [X] button to close the Add Purchase Order Details screen*
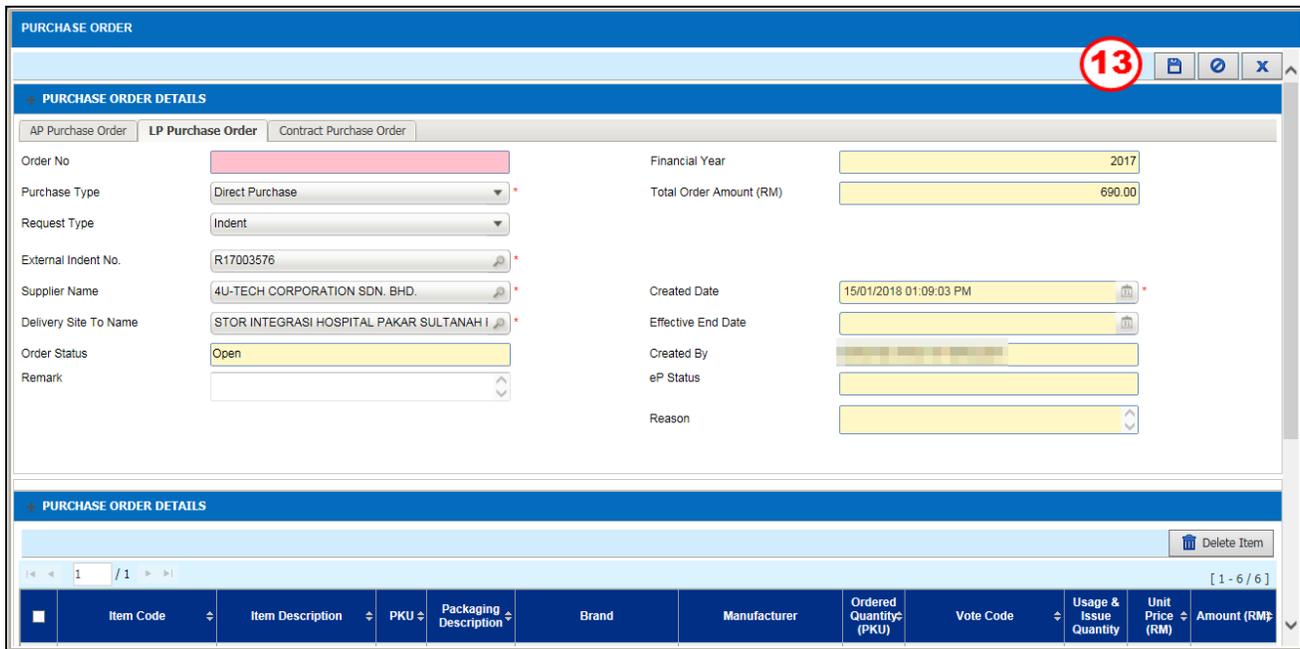
**Figure 3.3.4-8 LP Purchase Order**

**STEP 13**

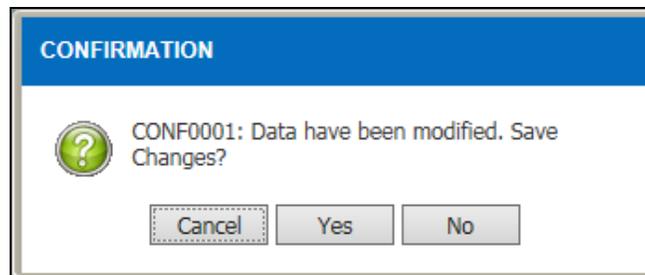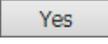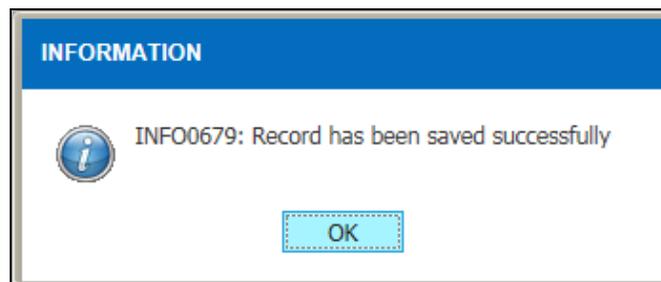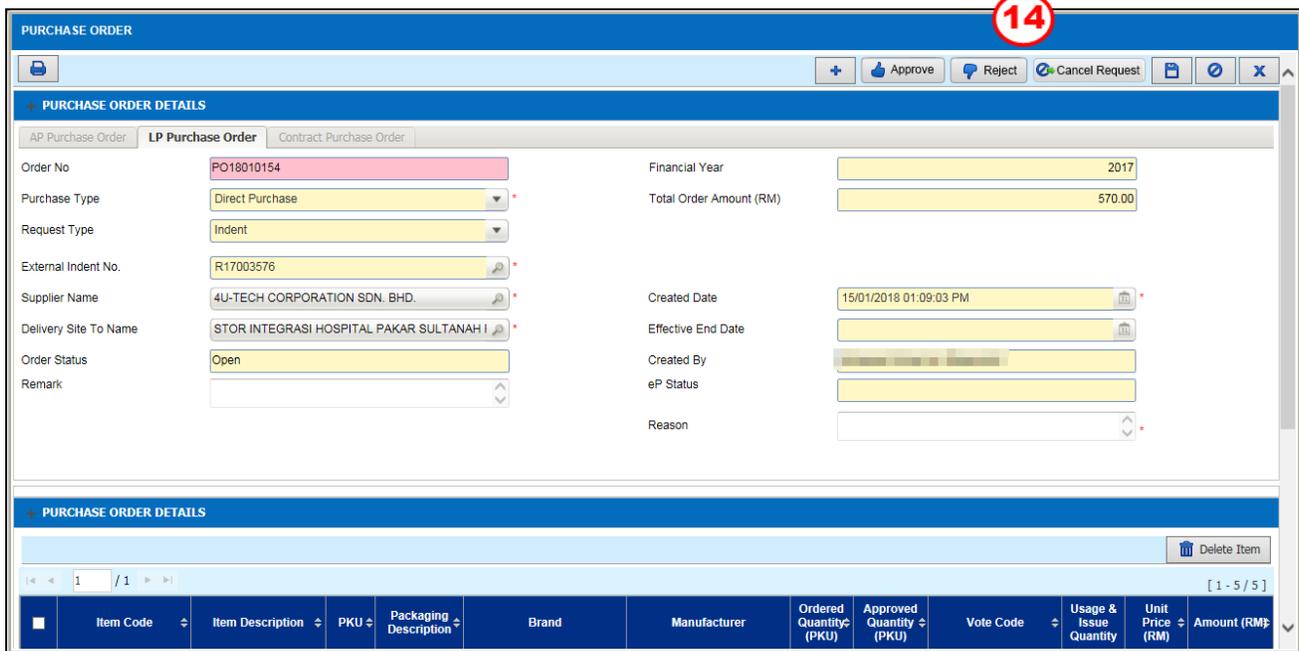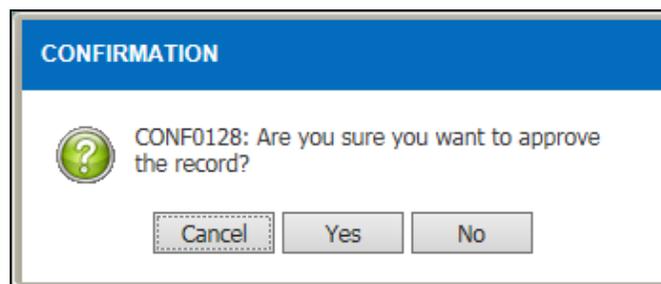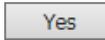Click on the [💾] button to save the record and confirmation message will be display as Figure 3.3.4-9



**Figure 3.3.4-9 Confirmation Message**

***Note***

*Click on the* [Yes] *button to save the record and information message will be display as Figure 3.3.4-10*



**Figure 3.3.4-10 Information Message**

***Note***

- *Click on the* [OK] *button to successfully save the record*

- **Order No** will be auto generated after successfully saved the record

- *Only five (5) item is allowed for each order*

- *Button* [Approve] , [Reject] *and* [Cancel Request] *will be enable after successfully saved the record as shown in Figure 3.3.4-11*



**Figure 3.3.4-11 LP Purchase Order**

**STEP 14**

a) Click on the [Approve] button to approve the record and confirmation message will be display as Figure 3.3.4-12



**Figure 3.3.4-12 Confirmation Message**

***Note***

- *Click on the* [Yes] *button to approved record and information message will be display as Figure 3.3.4-13*
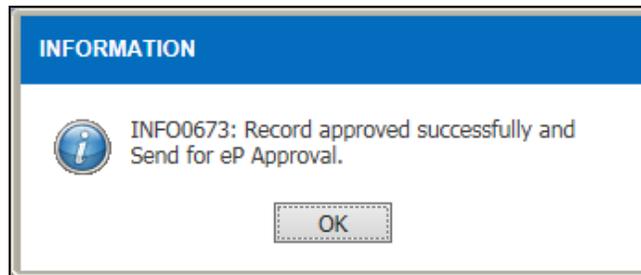
**Figure 3.3.4-13 Information Message**

*Note*

- *Click on the* OK *button to successfully approved the record*

b) Click on the Reject button to reject the record and confirmation message will be display as Figure 3.3.4-14

*Note*
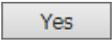
*User need to enter **Reject Reason** before click on the* Reject *button*
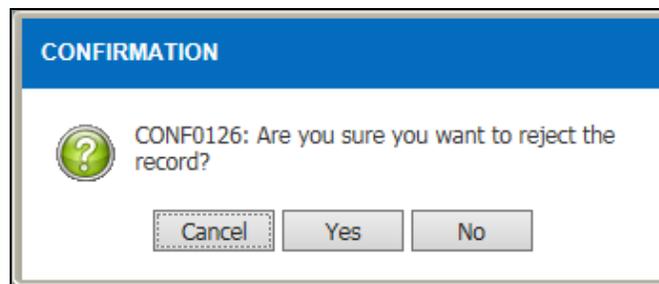


**Figure 3.3.4-14 Confirmation Message**

*Note*

- *Click on the* Yes *button to reject record and information message will be display as Figure 3.3.4-15*
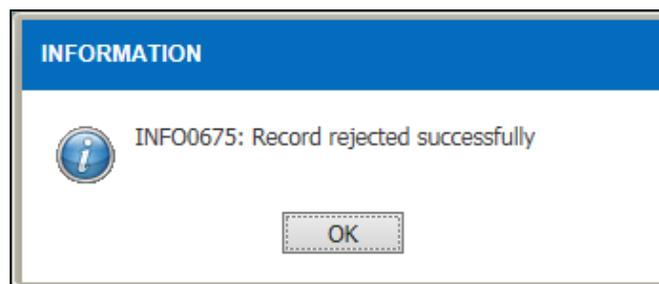


**Figure 3.3.4-15 Information Message**

*Note*
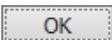
- *Click on the* OK *button to successfully rejected the record*

### 3.3.5 Purchase Order LP: eP Approval

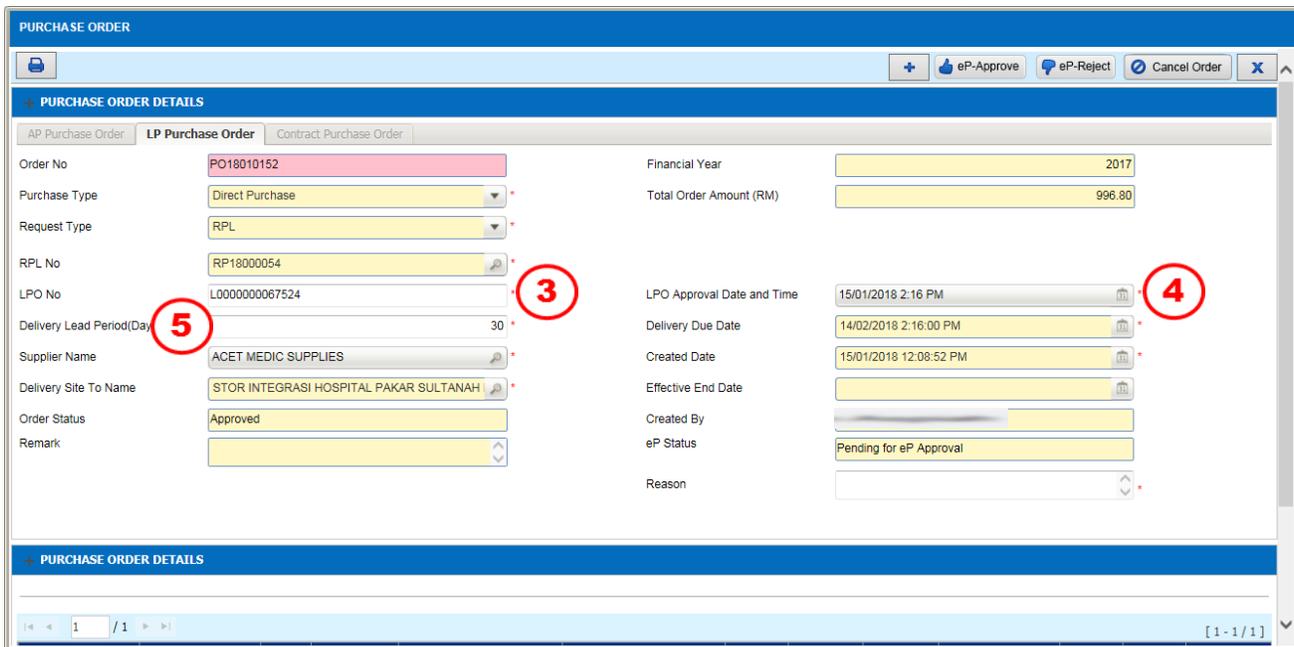To proceed with eP Approval process, perform the steps below:



**Figure 3.3.5-1 LP Purchase Order Listing Page**

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

**STEP 2**
Search for LP Order Type with status 'Pending for eP Approval' and double click on the record



**Figure 3.3.5-2 LP Purchase Order**

**STEP 3**
Enter *LPO No*

**STEP 4**
Select *LPO Approval Date and Time*

**STEP 5**
Enter *Delivery Lead Period (Day)*

*Note*
*Delivery Due Date* will be auto calculated

| PURCHASE ORDER | | | | |
|---|---|---|---|---|
| Request Type | RPL | | | |
| RPL No | RP18000054 | | | |
| LPO No | L0000000067524 | LPO Approval Date and Time | 15/01/2018 2:16 PM | |
| Delivery Lead Period(Day) | 30 | Delivery Due Date | 14/02/2018 2:16:00 PM | |
| Supplier Name | ACET MEDIC SUPPLIES | Created Date | 15/01/2018 12:08:52 PM | |
| Delivery Site To Name | STOR INTEGRASI HOSPITAL PAKAR SULTANAH | Effective End Date | | |
| Order Status | Approved | Created By | | |
| Remark | | eP Status | Pending for eP Approval | |
| | | Reason | | |

**PURCHASE ORDER DETAILS**

| Item Code | Item Description | PKU | Packaging Description | Brand | Manufacturer | Ordered Quantity (PKU) | Approved Quantity (PKU) | eP Approved Quantity (PKU) | Vote Code | Usage & Issue Quantity | Unit Price (RM) | Amount (RM) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| G03CA57000T1001 XX.01 | Conjugated Oestrogens 0.625mg Tablet | box | box of 28 tablet | NO BRAND ⑥ | Manufacturer Unknown | 280 | 280 | 0 | 090401/031900/2740 1/01 Radioterapi (ubat) Operating | 0 | 3.56 | 996.80 |

**Figure 3.3.5-3 LP Purchase Order**

**STEP 6**
Double click on the selected item and Add Purchase Order Item screen will be display as Figure 3.3.5-4

**Figure 3.3.5-4 Add Purchase Order Item**

**STEP 7**
Enter *eP Approved Quantity (PKU)*

**STEP 8**

Click on the [save icon] button to save the record and confirmation message will be display as Figure 3.3.5-5



**Figure 3.3.5-5 Confirmation Message**

**<u>Note</u>**
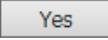
*Click on the* [Yes] *button to save the record and information message will be display as Figure 3.3.5-6*
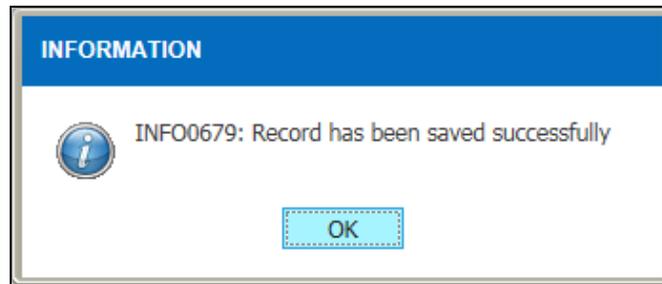
**Figure 3.3.5-6 Information Message**

*Note*

- *Click on the* OK *button to successfully saved the record*

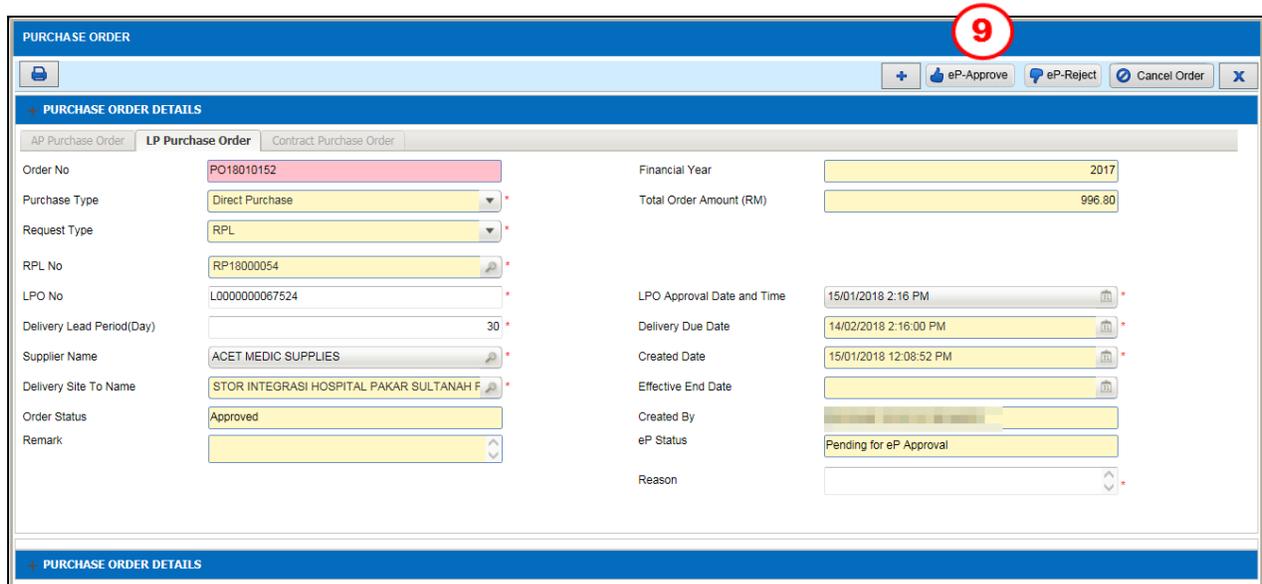- *Click on the* X *button to close the Add Purchase Order Item screen*



**Figure 3.3.5-7 LP Purchase Order**

**STEP 9**

Click on the eP-Approve button to approve the transaction and confirmation message will be display as Figure 3.3.5-8
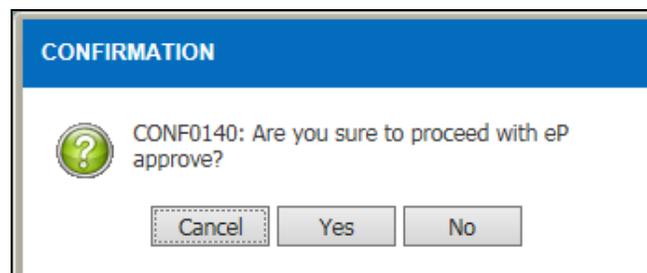


**Figure 3.3.5-8 Confirmation Message**

### Note

Click on the [ Yes ] button to save the record and information message will be display as Figure 3.3.5-9
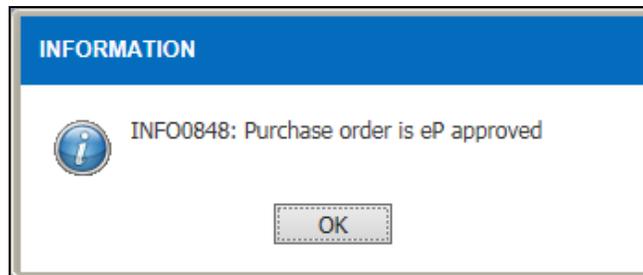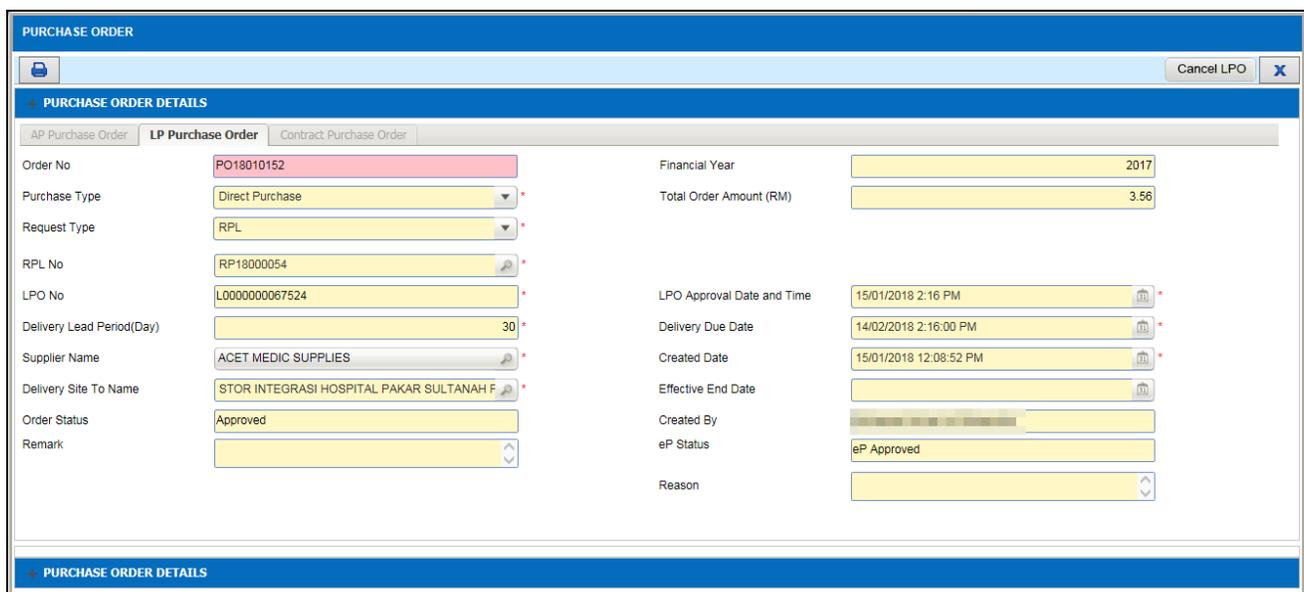


**Figure 3.3.5-9 Information Message**

### Note

- Click on the [ OK ] button to approve the purchase order

- **ep status** of the order will change to 'eP Approved'

- Button [ Cancel LPO ] will be enable after eP approval as Figure 3.3.5-10



**Figure 3.3.5-10 LP Purchase Order**

### Note

Click on the [ Cancel LPO ] button to cancel the approved LPO

### 3.3.6 Purchase Order LP: eP Reject/Cancel
To proceed with eP Reject/Cancel process, perform the steps below:
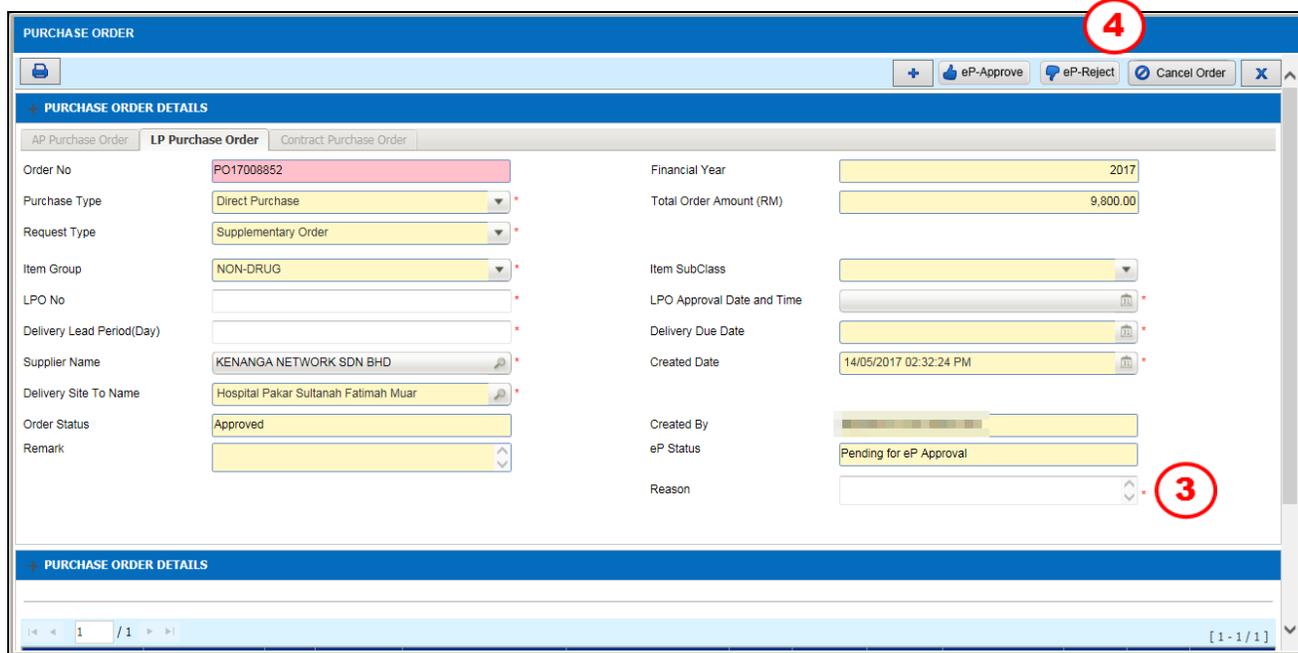


**Figure 3.3.6-1 LP Purchase Order Listing Page**

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

**STEP 2**
Search for LP Order Type with status 'Pending for eP Approval' and double click on the record



**Figure 3.3.6-2 LP Purchase Order**

**STEP 3**
Enter **Reason**

**STEP 4**

a) Click on the [eP-Reject] button to reject the record and confirmation message will be display as Figure 3.3.6-3



**Figure 3.3.6-3 Confirmation Message**

**Note**

- *Click on the* [Yes] *button to reject record and information message will be display as Figure 3.3.6-4*



**Figure 3.3.6-4 Information Message**

**Note**

- *Click on the* [OK] *button*

- ***eP Status*** *will change to eP Rejected*

b) Click on the **Cancel Request** button to cancel the record and confirmation message will be display as Figure 3.3.6-5
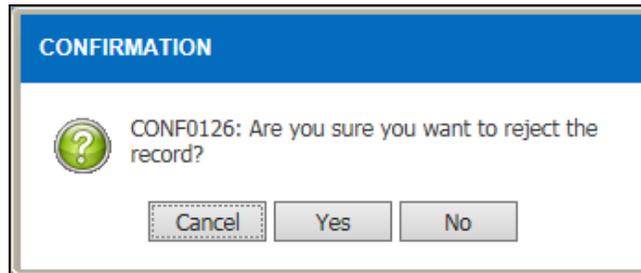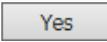


**Figure 3.3.6-5 Confirmation Message**

*Note*

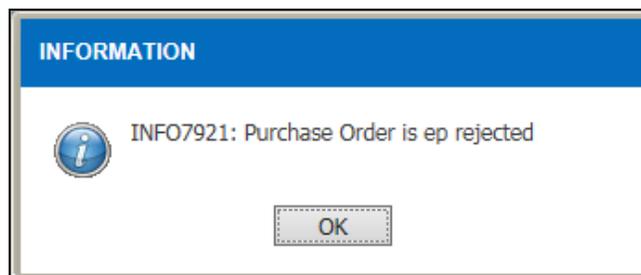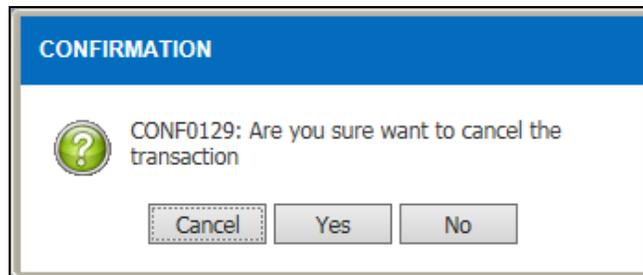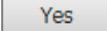- *Click on the* Yes *button to cancel record and information message will be display as Figure 3.3.6-6*
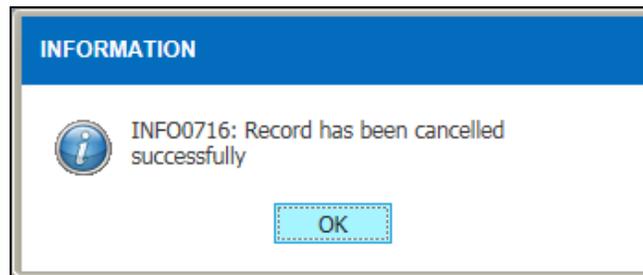


**Figure 3.3.6-6 Information Message**

*Note*

- *Click on the* OK *button to successfully cancelled the record*

- *eP Status will change to eP Cancelled*

## 4.0   Acronyms

| Abbreviation | Definition |
|---|---|
| MOH | Ministry of Health |
| KKM | Kementerian Kesihatan Malaysia |
| PhIS | Pharmacy Information System |
| CPS | Clinical Pharmacy System |
| PKU | Packaging Keeping Unit |
| SKU | Store Keeping Unit |
| TDM | Therapeutic Drug Monitoring |
| CDR | Cytotoxic Drug Reconstitution |
| APPL | Approved Product Purchase List |
| RPL | Recommended Purchase List |
| EPO | Electronic Purchase Order |

## 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 |