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<td>Louise Martin</td>
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<td>2.2</td>
<td>09/02/2011</td>
<td>Paul Moss</td>
<td>Bug Fixes</td>
</tr>
</tbody>
</table>
Bug Fixes

Requirements
- The NPC search now accepts the enter/return key when searching for products. (DE951)
- The requirement report now displays all demand for live and inactive products and displays the correct Reorder Level, Reorder Quantity and Maximum Stock Levels of all requirements. (DE1146)
- When a user deletes a product from page 2 (or greater) they are no longer returned to the first page of requirements. (DE1159)

Demand
- When adding manual demand, the NPC search now accepts the enter/return key when searching for products. (DE951)
- Additional messaging has been added to highlight suspended products and available alternatives can now be selected to replace the suspended item. See page 78 below. (US1591)
- When amending the stock or order qty or marking for deletion the default number of records per page is now retained. (DE1160)

Reports
- The correct maximum stock level is now displayed on the barcode catalogue sheet. (DE1129)
1 General principles

1.1 What is e-DC

Electronic Demand Capture (e-DC) enables you to manage stock and non-stock levels simply by using state-of-the-art PDA’s (Personal Digital Assistant) to scan product bar codes. Over 45% of our orders are already sent to us using this method. This system can be used to monitor and generate order information for all ward stocks, not just those products sourced via NHS Supply Chain.

1.2 Understanding the benefits

e-DC is the most cost effective way of managing stock levels. It makes the ordering process easy, so there is less chance of errors. It releases nursing time back to the wards and it improves communication between wards and the procurement departments. e-DC provides management information and enables you to forecast demand. Features include fast uploads, a notebook facility, a Dictaphone and 128mb of upgradeable memory and our experts are constantly working behind the scenes to improve the e-DC technology.

1.3 Communications and networking

The PDA connects directly to your local network. The benefits of this are:
Fast uploads
Automatic software updates
Downloadable NHS Supply Chain catalogue
Downloadable requirements
No need to be logged into system to upload/download data

If direct network communications are not available within your network, we have a USB alternative connection. This requires Microsoft Activesync loading onto your PC and is a free download from the Microsoft web site.

Your local IT departments input will be required for either set up

1.4 Support and training

The PDA rollout programme provides full training for Trusts using this new technology. Your local NHS Supply Chain IT Helpdesk will provide ongoing support.

If you would like more information about our e-DC service or have suggestions for its further improvement, please contact your local Account Manager or log a call with the IT Help Desk on 01773 724255 or email IT.Helpdesk@supplychain.nhs.uk
1.5 User roles

There are four levels of access within e-DC which can be allocated as required by the Trust Administrator.

e-DC user
This role allows access to the e-DC software and needs to be given to any user who requires access to e-DC.

Requirements Authoriser
This role is to be allocated to users who are required to authorise requirements and perform Global edits

e-DC Administrator
This allows users to access Configuration screens ie MMD maintenance/external location

e-DC Catalogue Management
This allows users to maintain the local catalogue

Full access provides the following options:

Home – click on Home to take you back to this screen
Catalogue – This is where all Non NHS Supply Chain items are managed
Requirements – This is where you will manage your stock levels by requisition point
Demand – Click on here to amend and process your requisitions
Reports – For all Material Management reports and Bar codes, click here
My Details – Your LOL user account details
Configuration – To set up a MMD or an External location feed
Log off
1.6 System Conventions

e-DC uses some standard functions to make the system more user-friendly. Some of these will be familiar to users of windows and other browser-based applications.

- Functions can be accessed by clicking on options displayed on the menu bar at the top of the main e-DC screen. These are displayed in white text on a blue background.
- Guidance notes are available from the NHS Supply Chain Online ordering launch page, and also within the application by clicking on the help tab.
- Clicking on these options will present the text in dark blue and offer further options, where available, from a dropdown, these in turn can be activated by clicking on them.
- Fields displayed in blue text are either hyperlinks or action buttons.
- The size of the main display area of the screen is increased by hitting the F11 key on the keyboard. This will maximise the e-DC window. Key F11 to return the display to the original format.
- The CTRL F5 function will remove any latent caching within your e-DC session, which may resolve minor screen display issues.
- When details have been entered, save screens if instructed before exiting.
- The windows find facility Ctrl F is available on all screens to enable you to locate a specific record on the current page more efficiently.
- The PDA has a standard windows mobile touch screen navigation.
### 1.7 Key to system icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🌞</td>
<td>Add/edit supplier</td>
</tr>
<tr>
<td>❔</td>
<td>denotes an error with a demand line</td>
</tr>
<tr>
<td>🔴</td>
<td>COSHH item (click on icon to display COSHH data sheet)</td>
</tr>
<tr>
<td>🔹</td>
<td>denotes Cross Dock item with variable lead time displayed in hover text</td>
</tr>
<tr>
<td>🌿</td>
<td>denotes eco-friendly item</td>
</tr>
<tr>
<td>🌱</td>
<td>denotes e-Direct item with lead time displayed in hover text</td>
</tr>
<tr>
<td>🌿</td>
<td>denotes electro medical item</td>
</tr>
<tr>
<td>🌿</td>
<td>WEEE directive</td>
</tr>
<tr>
<td>🌿</td>
<td>ethically sourced product</td>
</tr>
<tr>
<td>🌿</td>
<td>commitment discount scheme</td>
</tr>
<tr>
<td>🌿</td>
<td>denotes item captured via PDA</td>
</tr>
<tr>
<td>🌿</td>
<td>denotes item entered manually via the edc application</td>
</tr>
</tbody>
</table>
2.1 PDA functionality

The Motorola MC70 PDA

- **Scan LED & indicators.**
- **On/Off button**
- **Left scanner trigger**
- **Right scanner trigger**
- **SC card slot**
- **Alpha/Numeric Keypad**
- **Touch Screen**
- **Centre scanner trigger**
The Intermec 700 series colour PDA (Personal Digital Assistant)

Extra functionality includes:

- Can use as a voice recorder
- Make notes
- Set an alarm
- Change scanner configuration, vibrates instead of bleeps
- Microsoft Excel and Word
- Can link up to your own Trust email
3 Electronic Data Capture (e-DC)

3.1 Logging on to e-DC

- From your PC connect to NHSNet through your local network
- Connect to NHS Supply Chain homepage by entering www.supplychain.nhs.uk
- The above will open the NHS Supply Chain Online home page as shown below.

3.2 The my supply chain home page

Users have the following four button selection options from the home page:

- Online ordering – ordering application including financial coding (guidance notes for financial coding are available separately)
- NHS-Cat - online catalogue which includes visibility of all our National Framework Contracts and NHS Supply Chain stock catalogue items
- EDC - Electronic demand capture – materials management application
- Home delivery – patient and Care Home delivery application
Users may also have the following options for selection from the left hand side of the home page:

- TR Reports – Trust transaction reporting suite
- Billing – online self serve billing application
- Knowledge Centre – an online repository for supply chain related subjects
- Speed test – this checks the speed of your network
- Product Forums – a forum for members to discuss supply chain topics
- Contact us
- Helpdesk

In addition users have access to print application guidance notes.

- Click on the EDC button at the bottom and this will display the EDC log-on screen.
3.3 Passwords and login

The Trust administrator creates the username and password for e-DC users. If the user already has a login and password for Online ordering this can simply be amended to include the e-DC roles.

The login screen requires a unique username and password, forcing the letters to be in uppercase as you key them in. User names that have become inactive can not be re-used as inactive user data is retained for an indefinite period.

If your existing password is still valid, once you have entered your user name and password, click login or enter return.

If you are using the system for the first time, or if your password has expired, you will be asked to enter a new password and once the new password is confirmed, you will be logged onto the system.
If you are a new user with the Authorise and Send role for Online ordering, you will also be prompted to enter a PIN (Authorisation Code)

As you click the save changes button, a window may appear asking if you want Windows to remember your password. Select the don’t offer to remember any more passwords option, and then click on the no option – this is very important for security reasons.

If you have forgotten your password then click the blue ‘Forgotten your password?’ text and enter the details as required on the screen shown below. The system will verify your username with the email address, reset the password and email this to you.

The application information on the screen above should be noted, it will be updated as system requirements dictate.
As shown above there are 2 key areas to this screen, the menu bar and the main display screen.

From the drop down bar, select the Depot from which you are served.

Then select your required MMD, once selected the MMD will be displayed in the top right hand corner of the screen and the menu bar options are now available to use.
4.1 Password Changes

The system will force you to change your password every 30 days. As the PDA and Supply Chain passwords are the same, be aware that any Online ordering password changes won’t be updated on the PDA until an MMD download is performed. It is good practice that every time you change your Online ordering password, you re-download all MMDs to keep your PDA and Online ordering synchronised.

When performing an upload the PDA will check for password changes since the last download. It will allow the use of either the new password or the old one to access the PDA. Once a proper download has taken place, only the new password will be available.
4.2 Configuration

4.2.1 Adding a new MMD

To add a new MMD, select the Configuration option from the Menu bar.

Then select MMD option from the drop down menu, the details of all MMD’s you have access to is displayed.

To add a new MMD, click on the “Add New MMD” button.
The following screen will be displayed

Complete the following fields:

- **MMD short name**
  This is a mandatory 6 character field that will identify the MMD on the PDA e.g. DISTXX
  - **MMD name**
    This is a 40 character field; enter the MMD name and description.
    - **Depot**
      Select the depot you wish to assign this MMD to. It will automatically default to the depot you are currently logged into but you can select any depot you have access to.
    - **District**
      Select the Trust ID you wish to assign this MMD to. It will automatically default to the Trust you are currently logged into but you can select any Trust you have access to.
    - **Catalogue**
      Select Use default catalogue unless using a specific shared catalogue

On completion of the required fields, click on “Save changes” button at the bottom of the screen.

You will notice once this data has been registered on the database the MMD identifier in the top right hand corner of the screen will have changed to your new MMD name.
You must now add the requisition points you wish to assign to this MMD.

To add the Requisition points, click on “Create New Req Point” button. bar and select the required requisition point.
The following screen will be displayed:

**NB – Only requisition points that are not assigned to other MMD’s will be available for selection.**

Select the required requisition point and enter data in all the relevant fields, please note:

- **Replenishment method**

See section 4.2.1.1 for an explanation of the replenishment methods available
- **External location**

This is the external destination for any Non-stock feeds. Data only to be entered in this field if using e-DC for Non-stock.

- **Price breaks**

Enter a tick in this box if you wish to automatically round up requisition quantities to the next price band. By entering a tick in this field the system will force you to enter a % in the Price breaks percentage field.

- **Price breaks percentage**

If the order quantity falls within the value entered in this field the system will automatically round up your order to the next price band e.g. If you have an order quantity of 8 and a price break percentage of 25% and the next price band is 10, the system will automatically order you a quantity of 10. If you have an order quantity of 7, because this doesn't fall within 25% of the next price band (i.e. 10) the system will only order you 7.

- **Local reference**

The Local reference is a look up field between our system and Trust purchase order systems i.e. different requisition points. Only complete this field if your external non-stock feed requires this data.

Click on the “Save” button to confirm.

This will display the information saved.

To make amendments, select the “Edit” button.

**Import requirements**

If you wish to copy a requirement list from one requisition point to another you select the “Import Requirements” button.

The following pop up box is displayed.

Select the source MMD and Requisition point from the drop down box and select “Import”
As shown below, a message will be displayed at the bottom of the screen confirming how many requirements have been copied across.

Select the X in the top right hand corner of the pop up box to close it.

### 4.2.1.1 Replenishment methods

- **Top – up**

  For each product a maximum stock level is entered. When collecting data on the ward the quantity in stock is entered onto the PDA. If the quantity in stock is less than the pre set maximum, the difference will be requisitioned. This option is very useful if there is very little storage space on the ward.

- **Automatic**

  For each product a predetermined Re-order Level (ROL) and predetermined Re-order Quantity (ROQ) are mandatory entries. When collecting data on the ward the quantity in stock is entered onto the PDA. If the quantity in stock is less than or equal to the pre set ROL, the ROQ is requisitioned. This option is very useful if you wish to take advantage of our price break quantities.

- **Manual**

  For each product a predetermined re-order level (ROL), which is mandatory and predetermined re-order quantity (ROQ) may be entered, but is NOT mandatory for Manual replenishment. However, when collecting data on the ward the quantity required is entered onto the PDA, based on the stock levels on the bar-code label. This option is useful if there are no consistent ordering patterns for the department or if you wish to order more than the maximum stock figure.

### 4.2.2 Editing MMD’s

From the “Home” page, select the required MMD, and click on the “Edit” link in the top right hand corner of the menu bar.
Amend as necessary and “save” changes.

To amend requisition point details, select “MMD Configuration” from the menu bar and all the MMD’s available to you will be displayed.

Select the MMD link on the left hand side of the screen.
All the Requisition Points assigned to the MMD will be displayed.

To view the Requisition Point parameters select the Requisition point link on the left hand side of the screen.

To edit, select the “Edit” link on the right hand side of the screen.
Make your changes and select “save”

4.2.3 External Locations

If sending an interface file to your Trust Purchase Order system for Non-stock items captured in e-DC, you are required to set up an external location. This is where all the Non-stock data is held until file transfer.

To set up: From the Configuration option on the menu bar, select External Locations.

Click on the “Add New External Location” button at the bottom left-hand corner of the screen.

The following screen will be displayed:

You will then need to complete the fields:

- **External location**
  This is the name you wish to give this location, normally the MMD name.

- **IP address**:
  This is the IP address of the computer you are sending the data to.
• Username:
   This is Username of the account on the computer you are sending the data to.

• Password:
   A password will be required

• Confirm password:
   Confirm your password. The IP address, username and password will be agreed with your local IT department prior to system set-up.

• Feed type:
   This is the format of the feed and will be pre-agreed between the Trust and NHS Supply Chain IT Department.

• Filename attribute
   This information will be pre-agreed between your local IT and NHS Supply Chain, and the batch number that appears in the file name (if required) will reset to 001 when it reaches 999.

• Batch transmission
   If you wish to consolidate all your requisitions for the day and send them altogether, tick this box. You will then be asked to input a time (24hr clock) when the file will be sent. Otherwise a file will be sent automatically every time you process the demand.

• Active
   While this location is live, there should always be a tick in this field. If you remove the tick, feeds will no longer be sent.

Once complete, click on the “Save Changes” button. Your Location will then be listed on the screen shown below.

---

4.2.3.1 Amending & Deactivating External Locations

From the “Home” page, select the required MMD, from Configuration Menu, External Locations

Click the “Edit” link at the right hand side of the screen.

Make your changes. Click on the “save” button to confirm all changes. To deactivate an External Location select the relevant External Location from the Summary screen and remove the tick from the active box.
4.3 Requirements

In order to requisition an item in e-DC, each product should be linked to a requisition point with a given stock level (dependant upon which replenishment method you are using), this is known as setting a requirement.

4.3.1 Setting new requirements

From the e-DC home page select requirement from the menu bar, the following page will be displayed.

From the drop down menu select summary, the following page will be displayed.
This screen shows all requisition points assigned to the selected MMD and the number of requirements set against each requisition point. Note: the replenishment method for each requisition point is also shown.

The filter option at the top of the screen allows you to refine the display.

You can filter for:

- Stock Products (NHS Supply Chain)
- Local Products (Internal & External)
- Missing Products (Where no NHSSC Catalogue code is found)
- Unauthorised Products (Where the requirement is not authorised)
- Specific Requisition Point
- Specific Product Code

Where no filter is applied the complete list is displayed.

Select the required filter from the drop down box and then click filter.

To add requirements to a new Requisition point without any requirements, click on the "create requirement" link.

To add requirements to a Requisition point with requirements, click on the "records in total " link on the right hand side of the screen. Then click on "New requirement"
The following screen will be displayed:

The cursor appears in the “Product selector” field where you can search for the NPC code by using between the first and sixth character of the NPC code e.g. A, AB, ABT, ABT1, ABT12 or ABT123. The wildcard (%) may only be used in conjunction with other characters. For example if you selected “A%” the following screen would be displayed:

From the drop down box, select the product you wish to add.
Items that already have a requirement set are displayed in blue text. Clicking on the blue text takes you directly to the “Edit” screen. Local items are displayed in red text.
If you select the full NPC code, it will automatically default to the next screen.
All the NPC catalogue information is displayed including all price bands where relevant. The cursor defaults to the scaling factor field.

What is scaling factor?
If the product is a slow moving item and/or is a large unit of issue e.g. pack of 1000, you can set reordering stock levels within the pack size e.g. rather than wait until you have no stock left before reordering, you can reorder when there are 50 left in the box of 1000 by setting a scaling factor. The scaling factor value will default to 1. To utilise this function, enter a value in the scaling factor field, which must be equivalent to the pack size units e.g. 1000. The stock levels you then set have to be in relation to the units within the pack size. The system will automatically round up any reorder quantities that are not multiples of the pack size units.

In 'Re-order Level' enter the agreed ROL

**NB The ROL is the Maximum Stock Level when using Top up Replenishment.**

In 'Re-order quantity' enter the quantity required dependant on the replenishment method, If Top up replenishment has been set then you will not be prompted to enter a ROQ.

The 'Maximum stock level' will be calculated automatically.

If you have the Requirements Authoriser role, any new requirements will be automatically authorised and a tick will appear in this field. Users without this role will need to get their requirements authorised by an authorised user.

In 'Group' key enter up to an 15 digit stock location for the product, e.g A101 shelf A, row 1, item 1.

The 'Bin Full Quantity' is used for information purposes only. It may be left blank or used as a guide to the quantity of an item that can be stored in a storage location. Enter the quantity if required. This figure is printed on the bar codes.
Internal item – if the requirement you are setting is from an internal store (CSSD, linen store etc) enter a tick in this field and you will be prompted to select a supplier from a drop down box.

On completion of all fields, click “save changes”.

Continue adding the NPC codes to the requisition point as applicable until the ward stock requirements are complete.

To add an additional requirement, select the “New Requirement” button
4.3.2 Amending an existing requirement

On the right hand side of the Requirement summary screen, the number of requirements for each requisition point is displayed.

Click the requirements list required

With a filter applied clicking on this text will take you into the requirements list and the following screen will be displayed:
To amend a specific item click on the NPC code, the following screen will be displayed:

Amend fields as required and click on “save changes” to update.
NB If you do not have the “Requirement authoriser” role, these changes will need to be re-authorised.

To abandon any changes click back until the filter option is re-displayed, the selected NPC will remain in the filter until you click clear which will refresh the requirements screen to show all records.

4.3.3 Deleting an existing requirement

From the requirement summary screen, click on the number of requirements in total and the following image will be displayed.

To delete all requirements click the delete all button.

A warning message will appear for confirmation as shown below.
To delete selected requirements click the delete all button. Check the header box to select all the items on the screen or select individual boxes. Then click the delete selected button.

Note that the delete selected button will only delete the items from the page shown. Once deleted the screen will refresh to enable further page deletion.
4.3.4 Removing Invalid codes

Where an NPC code is no longer active, they are displayed on the requirements summary screen as “Missing requirements.”

Select this link and the following screen is displayed.

![Image of the requirement summary screen](image)

Tick the items you wish to delete and then click on the delete button.
4.3.5 Global edit

To replace one product with another, on one or more requirement, you can utilise the Global Edit function.
From the EDC homepage, click on the requirement menu option and select the Global Edit function.

The following screen will be displayed

In the source product code, enter the NPC code you wish to replace. (You can use the search facility if required).
All details of the product will be displayed. The system will prompt you to enter the destination NPC code which again you can search for if required.
For internal items click the internal box to select a supplier from the dropdown. Only those requisitions that have a requirement for the old product code will be displayed. You can either amend all by clicking on the update button or select individual requisition points as required. Once updated, the following confirmation screen displays which requisition points have been affected.

Note:
Unit of issue pack size changes are calculated and stock levels automatically amended on update. The demand type will be changed to reflect that of the new product ie S-Stock, E-External, I-Internal
4.3.6 Global deletes

To delete a product, on one or more requirement, you can utilise the Global delete function. From the EDC homepage, click on the requirement menu option and select the Global delete function.

The following screen will be displayed

Enter the NPC code you wish to delete, which may include products no longer in the catalogue. (You can use the search facility if required).
Click the Delete button and the following screen is then displayed. Reqpoints without this item in their requirements are highlighted in red. Those successfully deleted are shown with a tick.
5 System set up and maintenance

5.1 Accessing e-DC

Switch on the PDA by pressing the yellow I/O button on the keypad

The following screen will be displayed
Select the “Start” button:
Select “e-DC” from the drop down menu:

The following screen will be displayed:
5.2 Downloading MMD’s and requirements

To start an auto download:

Place the PDA in the cradle  
On the PDA device, select “Comms”

The following screen will be displayed:

Enter your Online ordering username in the username field and your password and select “Get MMD list”.  
This will log onto Online ordering and identify which MMD’s you have access to. When the download is complete you will get the “end” message and the background will turn green. If the background turns red, there is an error, the detail of which will be displayed on the screen. e.g. invalid user name, password etc.
You can download individual MMD's by selecting the specific MMD or select “all MMD's” to download them all.

Select “Load MMD + R”. By default all requirements set for this MMD will be downloaded to the PDA.

The number of Users within the MMD will be displayed, followed by the number of Requisition Points. “End” is displayed once all data is downloaded and the background turns green.
5.3 Downloading the NHS Supply Chain catalogue to the PDA

From the EDC main menu, select “Comms”

The following screen will be displayed

Enter your Online ordering username and password and from the MMD dropdown box select “Stock catalogue” then select the “Load Stock Cat” button.

The stock Catalogue will now download. Be aware this takes approximately 5 minutes. On completion the “End” message will appear and the background will turn green. It is advisable to perform this task weekly to ensure catalogue is up to date.
The PDA is now ready for use.
To return to the main menu select the “OK” in the top right hand corner of the screen.

**NB** – The stock catalogue will only download if the device has sufficient memory on the storage card and there is a storage card in place.

If the device does not have sufficient memory you will receive the following error message when trying to download the catalogue.

Should you receive this error, please contact the NHS Supply Chain Helpdesk.
5.3.1 Memory Check

To check how much free memory is available on the storage card

Select “Functions” and then “Device Information” from the logon screen.

The amount of free memory is displayed.
5.4 Catalogue browse & search

Select “Catalogue” from the main menu.

The following screen will be displayed

You can search for products in the NHS Supply Chain catalogue and/or your local Non stock catalogue by the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NPC [Full]</td>
<td>National product code</td>
</tr>
<tr>
<td>NPC [Start]</td>
<td>Description of the product</td>
</tr>
<tr>
<td>MPC [Full]</td>
<td>Manufacturers product code</td>
</tr>
<tr>
<td>MPC [Start]</td>
<td>Brand name</td>
</tr>
<tr>
<td>Brand [Full]</td>
<td>European article number</td>
</tr>
</tbody>
</table>

NB – Using the [Full] or [Start] search options are significantly quicker then using the [Part] option. 1 – 2 seconds rather than 1 – 2 minutes.
Enter the criteria and select “Search”

The following screen will be displayed

Once your item has been found, select it to display all product details.

The “Show” option at the bottom of the screens allows the user to see exactly what search criteria has been entered via the “Query” option.
The Query Stats option allows the user to see how many records the search has returned and the search time.

Deleting a MMD from the PDA
Select the MMD you wish to delete from the Dropdown menu.
Select the “Functions” option.
Select “Delete MMD”
Confirm you wish to delete the MMD
The MMD will have been deleted from the PDA.
5.5 PDA software updates

As the PDA software is constantly being developed, new versions of software will need to be released to update your PDA. An advantage of the new network comms is that we are able to remotely update the software on the PDA’s. Each time you perform either an upload or download the PDA will check for any upgrades. If there is, on exiting the comms screen you will automatically be taken into the program updater.

Program update available

Select OK and the following screen will be displayed
Click on update
The program will load automatically

You will be advised that the e-DC software already exists and are asked to re-install it. Confirm ‘Yes’
The software will re-install automatically and be available the next time you select the application. Occasionally we may force a software release due to database structure amendments. In this case the following screen will be displayed.

Follow the steps above to install the new software.
6 Data capture

6.1 Escape/Action key scanning

Your PDA can be set up to enable you to use the “Escape” and “Action” keys as barcode scanner triggers, to do this:

Select the “Options” tab

Select “Esc/Act Scan”

NB The original scan triggers will not be disabled by this procedure.
6.2 Scanning barcodes with spaces in the product code

This option enables the PDA to read barcodes with spaces in and is enabled by default.

To disable this option:

Select the Options tab from the requisition screen and select "Allow spaces in NPC"

The option will be disabled and any characters after a space will be ignored when scanning.
6.3 Raising a requisition

Logon to the PDA:

MMD - select the required MMD from the dropdown list.
Username - select from the dropdown list or input via the keyboard.
Password - enter using the “Pop Up” keyboard.
Once your password has been entered, select “Login” or press “Enter”

Once the correct username & password has been entered the “Login” box will change to “Logged In” and the “Pop Up” keyboard will disappear.
Select “Req Data” to collect requisition data.

Either scan the Requisition Point Barcode or select it from the dropdown list.

If using Topup replenishment and you do not wish to enter quantities, remove the tick from the “Enter Qty” box. The tick is removed by default for Automatic (ROL/ROQ) replenishment.

6.3.1 Raising a requisition using bar codes or keying in

Scan the product barcode or key in the NPC code.
Enter the quantity (where required)
Select the “ADD” button on screen or select the “ENTER” key.
Continue entering products and quantities until the requisition is complete.
All products and quantities are displayed on screen.
Use the vertical scroll bar to view items ordered.
To amend a quantity, select the line or re scan the barcode and enter the new quantity.

You will notice that the product description and stock levels appear on the screen, any amendments to this information are updated when an MMD download/stock catalogue is performed.
You can amend either the stock quantity or the order quantity dependant on your replenishment method.
The system records both stock quantity & order quantity. Amending the order quantity on the PDA has the same effect as amending the quantity after upload.

IMPORTANT
If using Manual replenishment, only the order quantity can be amended.
If using Top Up or Automatic replenishment, amending the order quantity will override all stock levels set within e-DC and order the amount selected.

An amended line will display an “A” next to the quantity. A deleted line will display a “D” next to the quantity amended to zero.
To collect data for another Requisition Point, either choose from the dropdown list or select the Requisition Point field and scan another Requisition Point barcode.
To close the window and return to the main menu, select the “OK” in the top right hand corner of the screen.

The following additional details are displayed
Group Key
Manufacturers Product Code
Brand
Stock Qty and/or Order Qty depending on ordering method
The other buttons are:

- **Next >** - Takes you to the next record in the current view (Requirements or Order)
- **< Prev** - Takes you to the previous record in the current view (Requirements or Order)
- **>>>** - Takes you to the last record in the current view (Requirements or Order)
- **<<<** - Takes you to the first record in the current view (Requirements or Order)
- **↑** - To redisplay the amendment box
6.3.2 Auto Full Screen Mode

For users wishing to view all product detail on capture, “auto full screen” mode can be activated.

To activate:

From the requisition screen, select the “options” tab and select “Auto Full Screen”.

Once activated, all product details will be displayed after the product code has been entered (by scanning or manual entry).

After the Order/Stock quantity has been entered the screen reverts back to data view until the next item is entered.

NB – Once this option is set it will be saved until deactivated.
To deactivate:

Select the “options” tab and select “Auto Full Screen”

6.3.3 Creating a requisition from requirements

Another way to capture data rather than using bar codes is to create a requisition from the requirements.
Select the “Req Data” button

Either scan the Requisition Point barcode or select it from the dropdown list.
Select the “view” option from the bottom of the screen and then select “requirements”
NB The requirements listed will only be as up to date as the last MMD download.
All requirements for the selected Requisition point will be displayed on screen. To order, tap the item required.

You will then be prompted to enter a quantity. Enter a quantity and tap OK or press enter.

**NB** - If you use manual or automatic replenishment, you will be prompted for an order quantity. If using top-up you will be prompted for a stock quantity.

Continue adding lines until your requisition is complete then select the “view” option at the bottom of the screen and select “data”.

This will then take you back to the normal ordering screen as below:
6.3.4 Auto Advance Mode (Requirements view only)

To automatically select the next item in requirements view, you can enable “Auto Advance” mode.

To activate:

From the requisition screen, select the “options” tab and select “Auto Advance”

When activated the next item in the requirements list is automatically selected once the Order/Stock quantity has been entered.

On completion the screen automatically selects the next item
To skip to the next item select “Skip”
To revert back to the requirements view select “Cancel”

NB – Once this option is set it will be saved until deactivated.

To deactivate:
Select the “options” tab and select “Auto Advance”

6.3.5 Ordering using the search facility

To add items to a requisition using the search facility:
Select the “catalogue” option.
The following screen is displayed. Enter your search criteria and select “Search”
Select the item you wish to view.

The following screen is displayed.

Select the “Add” button to add the item to your requisition.

If you wish to display only the Requisition Points that have data in them.
NB this option is available on both the requisitioning and the stocktaking screens.

Select the “Options” tab at the bottom left of the screen, select “Show only Reqnpts with Data”

When you select the requisition point drop down only the Requisition Points with data in are displayed.
A * is displayed to highlight that you have selected this option

If duplicate records are generated, there is a way of identifying and deleting them. Select “Req Data” from the main menu on the PDA. Select “Options” then “Show only req points with Data”

Select a req point. This will locate the first instance of a duplicate record and displays the following message.
The duplicate record is displayed. The duplicate line can be deleted by following point 5.3 below.

There is also the ability to manually check for a duplicate line.

From the Requisition Data screen, select “Options” and then “Locate Duplicate”
If a duplicate record is found, follow steps above.

NB the upload will error if there is a duplicate record and it has not been deleted. Error message reads as follows.

6.3.7 Deleting a requisition line

There is the ability to permanently delete a single Requisition Data line by selecting "Delete" for a line already marked for deletion.

Select the line you wish to delete from the requisition data screen on the PDA.

From the "amend" screen, select the "Delete" button
This will flag the line for deletion but not physically delete it.

To physically delete the line, select the item again and select "Delete" again.

You will receive the following confirmation message.

<table>
<thead>
<tr>
<th>Delete Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>This will permanently remove the item. Are you sure you wish to delete it?</td>
</tr>
</tbody>
</table>

Confirm "Yes" and the line will be deleted.

### 6.3.8 Copying Requisition data.

In the event of a user collecting requisition data against the incorrect Requisition Point, it is possible to copy the data to another Requisition Point.

From the Requisition Data screen, select "Options"
Then select “Copy Requisition Data”
Select the Requisition Point you wish to copy the data to.
Select “Options”
Select “Paste Requisition Data”
Once the data has been copied, the following message is displayed

Select “OK” to confirm

6.3.9 Deleting Requisition data.

In the event of a user collecting requisition data against the incorrect Requisition Point, it is possible to copy the data to another Requisition Point and then delete the original data.
From the Requisition Data screen, select “Options”
Then select “Clear Requisition Data”. The following message is displayed:

Select “Yes”. A second confirmation is displayed:

Select “Yes” to confirm. Once deleted, select OK to the following message.

6.4 Uploading requirements to e-DC

Place the PDA in the cradle.
Ensure you are logged into the correct MMD on the PDA
On the PDA, select “Comms”
The following screen will be displayed:

Select the “send MMD data” button and the data will be transferred. When complete the background turns green with the “end” message at the top of the screen.

An alternative way of sending data is from the requisitioning screen

Select the “send” option and select “MMD data”.

Select “yes” and this will automatically take you into the “Comms” screen and perform the upload.
When upload is complete, a back up copy of all collected data is stored on the PDA. If any data loss happens during upload, the collected data can be re-covered for upload.
6.5  Restoring requisition data

Select the “Functions” option

Select “Restore Requisition Data”

Confirm you wish to restore the data at the YES/NO prompt.
The restored data is now available to upload.

6.6  Clearing requisition data

Should you wish to delete all the requisition data.
Select the “Functions” option
Select “Clear Requisition Data”
Confirm you wish to delete all your requisition data. If you select “yes” the following screen will be displayed:

The data will be deleted and archived away, but can be restored via the “Restore Requisition data” option should this be necessary.
7 Demand management

7.1 Validating demand

This screen allows you to verify data uploaded from the PDA and make amendments / additions / deletions as necessary. Once this validation process has been completed you can then commit the demand to NHS Supply Chain and/or your Purchase Order system.

Click on “Demand” from the menu bar. The following screen will be displayed.

![Demand Management Screen]

This screen will display all requisition points that have uploaded demand against them, it will also show a summary of the number of records against each requisition point. Click on the number of records in total to view the details. The following screen will be displayed.
To create manual demand select the reqpoint. If demand already exists the above demand details screen will automatically be displayed.

This screen shows:

How the demand was entered
NPC code
Description
Demand type
VLT Days (lead time other than the normal 48hr cycle)
Group key
Scaling factor
Unit of Issue
Reorder level
Reorder Qty
Adjustment, any error messages will be flagged in this screen
Stock Qty
Order Qty
Requisition Qty
Line Value

The preferred delivery day(s) are shown at the top of the page.

There are also a filter box at the top of the screen, this enables you to customise the view.

Both the Stock Qty or Order Qty can be amended by editing the relevant field.
To add a new line, click on the “New line” button, the following screen will be displayed:

Select all or part of the NPC code required. If part code entered, select code from drop down box, if full code entered this will be automatically displayed.

The following screen will be displayed:

Select “Add new line” to confirm.
Enter the order quantity required and click on save changes.

All products added to the demand screen manually must have a requirement set.

If there is no requirement the following screen will be displayed.
Click on the “Create Requirement” link and you will automatically be sent to the “Requirements” screen to set stock levels for the product. Once you have created a requirement, click on “Save Changes” and the screen will take you back to the demand screen where you enter the Order Qty.

To delete a product, enter a tick in the box next to the demand type icon. This will flag the item for deletion and will be deleted when the requisition is processed.
Suspended lines

Items suspended from the catalogue are highlighted showing the reason they are suspended and when they are due to be available. Where an alternative product is available it is displayed on screen.

Clicking on the link to the alternative product, replaces the original product and adjusts the quantity to be ordered in line with existing requirement settings for the replacement product.

Where an alternative product does not have a requirement a link to create one is displayed.
7.2 Processing Demand

Once you have validated all the uploaded data and made your amendments, you should then "Process" the demand to send the requisition to NHS Supply Chain and/or your Purchase Order system.

From the “demand management” screen, click on the “Process” button at the bottom of the screen.
The following screen will be displayed.

This screen shows a summary of what will and what will not be processed.

To create a print out of your demand, click on the blue hyperlink(s) on the left hand side of the page. e.g. “stock requisition” will create a print of all the NHS Supply Chain items and a summary will be displayed as follows:

To print it either “right click” the mouse and select “Print” or press “ctrl + P” and select your printer.

Select the “X” in the top right hand corner to close the report and take you back to the process page.

Click on the “Process” button to commit the demand.
The system will generate an order id and a requisition number XXXXM. See following screen.

Any demand that have any of the following will be deleted when the process button has been clicked. The number of records deleted is displayed on screen.

**Missing requirements**

**Unauthorised requirements**

**Invalid catalogue record**

**Zero quantity**

**Manually flagged for deletion**

All processed demand will be sent to Online ordering where its progress can be viewed using “Track and Trace”. See Online ordering Guidance notes.

**NB** If items with missing requirements are not set up and authorised, these are classed as “ad hoc” requisitions and the demand is sent to saved orders within Online ordering where additional authorisation is required prior to the demand being checked out and sent to Resus. The following warning message is displayed on the processing screen.
7.3 Track and trace

The progress of all NHS Supply Chain demand captured within e-DC can be seen within LOL latest orders. All e-DC requisitions can be identified by the suffix “M” and standard LOL requisitions as “W”.

Full instructions on Track and Trace can be found in the Online ordering guidance notes.

See example screen below:
8 Reports

The following route accesses all e-DC reports:
From the e-DC menu bar, select “Reports”, the following screen will be displayed.

Select the Report you require.

8.1 Authorisation Report

The image below shows the screen that would be displayed if you select “Authorisation”

Select the filters for print order, type of requisition, enter range of NPCs and if required group keys.

Select the Requisition points required and click on the “generate” button, the report will be generated and displayed on screen.

To export the report directly to Microsoft Excel, select the export button.
The Authorisation Report is a specific list of products to be managed and is specific to a given Requisition Point. It includes all items where requirements have been set against specific NPC codes, whether they be stock, non-stock or internal lines. The Authorisation Report contains the following information.

- MMD number and name
- Requisition Point number and name
- Methodology of data capture
- NPC code
- Product description
- Manufacturers Product Code
- Unit of issue
- Brand name
- Variable Lead Time days
- Group key (local bin location)
- Item type, Stock, Non-stock or Internal
- Current price
- Reorder level
- Reorder quantity
- Maximum stock
- Maximum stock value per NPC code
- Finance code

At the foot of the report, the total number of lines where stock levels have been agreed and the total maximum stock value of those lines. There is also narrative to allow the authorised budget holder to sign off the report as a binding document between the budget holder and the procurement department, indicating the stock level parameters to be observed when replenishing stock.
The Authorisation Report should be agreed and authorised by the budget holder at least every 3 months to ensure the current requirements are reflected.

A sample of an Authorisation report is shown below:

Click on the “printer” icon at the top of the screen to print the report.

8.2 Authorisation Summary Report

To view the total lines and total value only use the Authorisation Summary report.

The image below shows the screen that would be displayed if you select “Authorisation Summary”

Select the Requisition points required and click on the “generate” button, the report will be generated and displayed on screen.

To export the report directly to Microsoft Excel, select the export button.
A sample of an Authorisation Summary report is shown below:

```
<table>
<thead>
<tr>
<th>Req Point</th>
<th>Req Point Name</th>
<th>Total Lines</th>
<th>Total Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>YC2001</td>
<td>CUERDEN HALL MEDICAL</td>
<td>452</td>
<td>340,764.10</td>
</tr>
<tr>
<td>YC2002</td>
<td>CUERDEN HALL DOMESTIC</td>
<td>154</td>
<td>1,959.94</td>
</tr>
<tr>
<td>YC2010</td>
<td>BIRCHLEY HALL MEDICAL</td>
<td>10</td>
<td>262.50</td>
</tr>
<tr>
<td>YC2011</td>
<td>BIRCHLEY HALL DOMESTIC</td>
<td>205</td>
<td>112,457.93</td>
</tr>
<tr>
<td>YC2003</td>
<td>CUERDEN HALL CATERING</td>
<td>151</td>
<td>47,079.50</td>
</tr>
<tr>
<td>YC2004</td>
<td>CUERDEN HALL STATIONERY</td>
<td>296</td>
<td>4,077.83</td>
</tr>
<tr>
<td>YC2005</td>
<td>CUERDEN HALL COFFEE SHOP</td>
<td>176</td>
<td>3,064.21</td>
</tr>
<tr>
<td>YC2012</td>
<td>BIRCHLEY HALL CATERING</td>
<td>347</td>
<td>313,278.90</td>
</tr>
<tr>
<td>YO1002</td>
<td>JONATHON WEST</td>
<td>307</td>
<td>474,851.58</td>
</tr>
<tr>
<td>YO1001</td>
<td>LOUISE MARTIN</td>
<td>319</td>
<td>476,080.72</td>
</tr>
<tr>
<td>Totals</td>
<td></td>
<td></td>
<td>2,417.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>1,784,877.31</td>
</tr>
</tbody>
</table>
```

EDC - Authorisation Summary Report
8.3 Printing bar codes

Once all requirements have been created, you can now produce your Bar Codes. From the main e-DC menu, select “Reports” then select “Bar Code”.

The following screen will then be displayed

There are currently three bar code templates;

Bin Code labels
Bin Code labels with Requisition point bar code
Catalogue sheets

Make your selection from the template drop down box

You can select the print order by selecting an option from the drop down box:

NPC code
Group Key
Description

It is mandatory to enter an NPC from and to range (by selecting From: A - To: Z, will list all NPC’s within the range)

NB If using numeric codes for Non-stock, entering, From 0 (zero) – To Z, will list all you catalogue items.

To print bar codes within a specific “group key”, enter the appropriate “group key” to and from range.
To print bar codes amended since a given date, click on the calendar icon and the following screen will appear:

Select a date and this will populate the field.

The requisition points you have access to will be displayed. Select the requisition point/s that you wish to produce bar codes for, then select “generate” to produce all bar codes for your selection.

This will produce a “Pop up” PDF document that requires ADOBE reader installed on your PC to view.

If your Internet settings do not allow Pop Ups, hold down the Ctrl key when selecting “run”, this will allow the pop up to be displayed.

The following will then be displayed:

To print the bar codes, select the “print” icon at the top of the screen.
To ensure that the barcode labels print off in the correct format, the Page scaling should be set to “None” and the “Auto Rotate and Center” option should not be ticked.

Also, check that the paper size in the printer properties is set to A4.

8.4 Requirements report

The following image is the screen displayed when you select the Requirement report. Red text indicates mandatory fields. Select the print order from the drop down, and enter NPC selection and group key criteria as required. Select the relevant Requisition Point/s and click on generate or to export to Microsoft Excel, click on the Export button.
This requirements report summarises actual purchase history against individual NPC codes and formatted with the following information and displayed by lines ordered. The report provides data on products which have been purchased from all ordering sources not just eDC over a full 12 month period not including the current month. The financial periods are in line with the NHS Financial calendar which is published on the NHS Supply Chain website; there is a link to the financial calendars from the customer reports page.

MMD number and name
Requisition point number and name
NPC code
Product description
Unit of issue
Previous monthly issues

- Quantities purchased in the last complete financial period.
- Quantities purchased in the previous complete financial period
- 7-12 Quantities purchased in the six financial periods prior to the last 6 months.
- NPCs with no demand will be shown with zero quantities

The recommended reorder level based on the total purchases for the last 12 RESUS periods and divided by 52 weeks. This figure is always rounded up and is an average figure only.

The weekly average issue quantity is shown to 2 decimal places.
Reorder level. This will only be shown where requirements have been defined within RESUS, otherwise N/A will appear.
Reorder quantity. Dependent on which method of data capture is chosen, this will either be the fixed quantity for automatic replenishment or the difference between reorder level and maximum stock for top-up ordering.
Maximum stock level. This is the sum of the Re-order level + the Re-order quantity.
Average weekly issue quantity
Average weekly issue value

NB – products with a scaling factor applied are highlighted with an asterisk.
An example of the Requirements report is shown below:

Click on the printer icon at the top of the screen to print the report.

Export the file to Excel and the following additional information is displayed:
Group key, Max stock value, brand and MPC.
8.5 Requisition report

The requisition reports are split into five categories:

Stock  
Non-stock  
Internal  
Ad Hoc  
All

These reports show demand history for all the selected requisition points.

The following image shows the screen displayed when the Requisition Report is selected.

From the report type drop down box, select the report required. The demand created “from” and “to” fields are mandatory, by clicking on the calendar icon, select the dates required.

Click on requisition points required, and click on “generate” to create the report. To export the report to Microsoft Excel, click on the Export button.

The non-stock report sub-totals by supplier.
8.6 Local Catalogue Report

Select supplier or NPC from the print order dropdown, and NPC range to produce a list of the Trust's local products (see example below).

<table>
<thead>
<tr>
<th>NPC</th>
<th>Base description</th>
<th>Supplier ref</th>
<th>Supplier</th>
<th>UID</th>
<th>Price</th>
<th>E-class</th>
<th>Expense code</th>
</tr>
</thead>
<tbody>
<tr>
<td>002</td>
<td>Paper clipper</td>
<td></td>
<td></td>
<td>Box</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>002</td>
<td>Tilt</td>
<td></td>
<td></td>
<td>Box</td>
<td>10.00</td>
<td>ADT</td>
<td></td>
</tr>
<tr>
<td>002</td>
<td>Helix</td>
<td></td>
<td></td>
<td>Each</td>
<td>55.00</td>
<td>AAA</td>
<td></td>
</tr>
<tr>
<td>002</td>
<td>chicken medium range</td>
<td></td>
<td></td>
<td>Each</td>
<td>6.07</td>
<td>EVH</td>
<td></td>
</tr>
<tr>
<td>002</td>
<td>chicken</td>
<td></td>
<td></td>
<td>Each</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>002</td>
<td>alice</td>
<td></td>
<td></td>
<td>Each</td>
<td>1.00</td>
<td>AAA</td>
<td></td>
</tr>
<tr>
<td>002</td>
<td>world</td>
<td></td>
<td></td>
<td>Wallet</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>002</td>
<td>greenage jelly</td>
<td>0015</td>
<td>maidstone</td>
<td>Each</td>
<td>0.50</td>
<td>AEG</td>
<td></td>
</tr>
<tr>
<td>002</td>
<td>redcurrant jelly</td>
<td>0013</td>
<td>ROD JAYNE &amp; FREDDY</td>
<td>Box</td>
<td>0.80</td>
<td>ADU</td>
<td></td>
</tr>
<tr>
<td>002</td>
<td>lemon jelly</td>
<td>000033</td>
<td>johnson &amp; johnson</td>
<td>Each</td>
<td>0.10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>002</td>
<td>raspberry jelly</td>
<td>001</td>
<td>B &amp; Q</td>
<td>Each</td>
<td>0.50</td>
<td>AAB</td>
<td></td>
</tr>
</tbody>
</table>
8.7 **Stock Reports**

From the Reports option as shown below, click or hover on Stock Reports to provide a further selection menu to the right.

8.7.1 **Inventory Status Report**

Select Inventory status from the stock reports menu dropdown, click on generate. This is the value of items waiting to be processed in demand management. This report is for Trusts using automatic or top-up replenishment, where the report gives a stock value of the demand to be processed.

```
<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Item type</th>
<th>UOI</th>
<th>ROL</th>
<th>ROG</th>
<th>Max value</th>
<th>Stock quantity</th>
<th>Stock value</th>
</tr>
</thead>
<tbody>
<tr>
<td>8701</td>
<td>chair and its orange</td>
<td>Ext NIS</td>
<td>Each 1</td>
<td>10</td>
<td>1</td>
<td>110.00</td>
<td>25</td>
<td>265.00</td>
</tr>
<tr>
<td>8704</td>
<td>stove</td>
<td>Ext NIS</td>
<td>Pack 120</td>
<td>7</td>
<td>9</td>
<td>15.00</td>
<td>2</td>
<td>30.00</td>
</tr>
<tr>
<td>8709</td>
<td>Needle for insulin pen 20 gauge x 12mm</td>
<td>Stock</td>
<td>Pack 100</td>
<td>1</td>
<td>1</td>
<td>20.00</td>
<td>3</td>
<td>60.00</td>
</tr>
</tbody>
</table>
```

**EDC - Inventory status report**
8.7.2 Stock Take Report

The stock take report will value the items captured in the stock take.

Select “Stock take” from the “Reports” menu within “Stock reports”.

The report can be produced in either NPC code or Group Key order. Select the relevant Requisition Point/s and click on generate or to export to Microsoft Excel, click on the Export button.

The last 4 stocktakes are displayed for comparison purposes.

An example report is displayed below.

Click on the printer icon at the top of the screen to print the report. In the exported version of the report the types Stock, External or Internal are expressed in two columns:

<table>
<thead>
<tr>
<th>Local Item</th>
<th>Internal</th>
<th>Equals:</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRUE</td>
<td>TRUE</td>
<td>Internal</td>
</tr>
<tr>
<td>FALSE</td>
<td>FALSE</td>
<td>Stock</td>
</tr>
<tr>
<td>TRUE</td>
<td>FALSE</td>
<td>External</td>
</tr>
</tbody>
</table>
### 8.7.3 Stock Analysis Report

Select Stock Analysis from the stock reports menu dropdown, as shown above, click on generate. This report is based on the last 26 weeks of issues and displays weeks cover and stock turn calculations at product level within requisition point. This report is designed to assist Trusts with their efficient stock control.

<table>
<thead>
<tr>
<th>NRC</th>
<th>Full description</th>
<th>UOH</th>
<th>Avg weekly usage</th>
<th>Avg weekly value</th>
<th>ROSL</th>
<th>Max stock qty</th>
<th>Max stock value</th>
<th>Weeks cover</th>
<th>Stock turn</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAB169</td>
<td>Alcohol Whisky 70cl (24fl oz)</td>
<td>Each</td>
<td>0.24</td>
<td>0.47</td>
<td>10</td>
<td>11</td>
<td>124.75</td>
<td>275.00</td>
<td>0.20</td>
</tr>
<tr>
<td>AAZ202</td>
<td>Alcohol Whisky Cooking White</td>
<td>Each</td>
<td>1.64</td>
<td>9.88</td>
<td>10</td>
<td>10</td>
<td>124.20</td>
<td>12,390</td>
<td>2.00</td>
</tr>
<tr>
<td>AAB010</td>
<td>Soft drinks Juice natural</td>
<td>Each</td>
<td>50.43</td>
<td>24.79</td>
<td>1,080</td>
<td>500</td>
<td>1,500</td>
<td>1,005.00</td>
<td>59.04</td>
</tr>
<tr>
<td>ABD018</td>
<td>Baby meal service from 4 months &amp; over infant</td>
<td>Each</td>
<td>0.00</td>
<td>0.00</td>
<td>10</td>
<td>10</td>
<td>9.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>ABT022</td>
<td>Prepared food SM/Ready to feed grid cap 100ml</td>
<td>Pack 24</td>
<td>5.77</td>
<td>52.44</td>
<td>0</td>
<td>150</td>
<td>1,418.04</td>
<td>27.04</td>
<td>0.00</td>
</tr>
<tr>
<td>ABT008</td>
<td>K</td>
<td>Bag</td>
<td>0.00</td>
<td>0.00</td>
<td>10</td>
<td>10</td>
<td>8.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>ABT112</td>
<td>All-in-one padded absorbency plus</td>
<td>Pack 1</td>
<td>0.08</td>
<td>0.88</td>
<td>1</td>
<td>1</td>
<td>22.05</td>
<td>25.00</td>
<td>1.04</td>
</tr>
<tr>
<td>ABT145</td>
<td>Twin Pack FairyFloss 50g</td>
<td>Each</td>
<td>0.15</td>
<td>0.72</td>
<td>5</td>
<td>4</td>
<td>42.21</td>
<td>60.00</td>
<td>0.43</td>
</tr>
<tr>
<td>ABT081</td>
<td>Confectionary/Dessert Chocolate</td>
<td>Pack 48</td>
<td>0.80</td>
<td>0.90</td>
<td>2</td>
<td>7</td>
<td>109.97</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>AD7007</td>
<td>Confectionary Biscuits</td>
<td>Pack 16</td>
<td>0.27</td>
<td>1.43</td>
<td>14</td>
<td>7</td>
<td>111.72</td>
<td>77.78</td>
<td>0.53</td>
</tr>
</tbody>
</table>
8.7.4  Stock Analysis Summary

Select Stock analysis Summary from the stock reports menu dropdown, click on generate. This report is based on the last 26 weeks of issues and displays weeks cover and stock turn calculations summarised at requisition point level. This report is designed to assist Trusts with their efficient stock control.

<table>
<thead>
<tr>
<th>Req point</th>
<th>Req point name</th>
<th>Av wk issue</th>
<th>Av wk value</th>
<th>Max stock qty</th>
<th>Max stock value</th>
<th>Weeks cover</th>
<th>Stock turn</th>
</tr>
</thead>
<tbody>
<tr>
<td>YC0000</td>
<td>HOLLY HUNTER TEST</td>
<td>38.68</td>
<td>2,837.97</td>
<td>5,900</td>
<td>303,200.03</td>
<td>100.01</td>
<td>0.26</td>
</tr>
<tr>
<td>YC0001</td>
<td>LOUISE MARTIN</td>
<td>30.92</td>
<td>947.50</td>
<td>2,731</td>
<td>323,077.16</td>
<td>340.90</td>
<td>0.08</td>
</tr>
<tr>
<td>YC0027</td>
<td>NEWRECPON J-2</td>
<td>0.54</td>
<td>0.96</td>
<td>1,069</td>
<td>150,540.44</td>
<td>185,621.44</td>
<td>0.00</td>
</tr>
<tr>
<td>YC2001</td>
<td>CUERDEN HALL MEDICAL</td>
<td>157.32</td>
<td>18,294.44</td>
<td>5,047</td>
<td>352,929.53</td>
<td>21.87</td>
<td>1.20</td>
</tr>
<tr>
<td>YC2002</td>
<td>CUERDEN HALL DOMESTIC</td>
<td>13.88</td>
<td>557.62</td>
<td>390</td>
<td>19,690.00</td>
<td>26.14</td>
<td>0.74</td>
</tr>
<tr>
<td>YC2003</td>
<td>CUERDEN HALL CATERING</td>
<td>13.34</td>
<td>38.96</td>
<td>177</td>
<td>40,221.67</td>
<td>1,296.84</td>
<td>0.02</td>
</tr>
<tr>
<td>YC2004</td>
<td>CUERDEN HALL STATIONERY</td>
<td>14.10</td>
<td>351.33</td>
<td>944</td>
<td>6,016.25</td>
<td>22.32</td>
<td>1.14</td>
</tr>
<tr>
<td>YC2006</td>
<td>CUERDEN HALL COFFEE SHOP</td>
<td>1.42</td>
<td>98.36</td>
<td>79</td>
<td>1,296.81</td>
<td>14.72</td>
<td>1.77</td>
</tr>
<tr>
<td>YC2010</td>
<td>BIRCHLEY HALL MEDICAL (FRI)</td>
<td>1.50</td>
<td>1.53</td>
<td>4,009</td>
<td>310,070.50</td>
<td>208,549.75</td>
<td>0.00</td>
</tr>
<tr>
<td>YC2011</td>
<td>BIRCHLEY HALL DOMESTIC</td>
<td>3.851.07</td>
<td>23,337.18</td>
<td>256</td>
<td>114,178.20</td>
<td>4.90</td>
<td>5.31</td>
</tr>
<tr>
<td>YC2012</td>
<td>BIRCHLEY HALL CATERING (FRI)</td>
<td>9.22</td>
<td>397.88</td>
<td>2,416</td>
<td>260,848.75</td>
<td>705.50</td>
<td>0.04</td>
</tr>
<tr>
<td>YC2013</td>
<td>BIRCHLEY HALL STATIONERY</td>
<td>1.18</td>
<td>74.12</td>
<td>154</td>
<td>27,167.94</td>
<td>350.54</td>
<td>0.07</td>
</tr>
</tbody>
</table>
9  Stock-taking

9.1  Stock-taking data capture

There is a separate screen to collect stock take data.

A stock check can be performed without the worry of creating an order by mistake. The stock check screen works exactly the same as the requisition data screen but is a completely different colour to be obviously different.

Collect Stock Take data:
Select the “Stock Check” option from the main screen.

Either scan the Requisition Point Barcode or select it from the dropdown list.

Scan the product barcode and enter the quantity in stock.
To amend the quantity in stock either re scan the barcode or tap the product on screen

Enter the new quantity and select “OK” Continue until all codes are completed

When amending a stock quantity you will notice that the order quantity is automatically set to zero and cannot be amended

**Uploading the stock-take data**

Place PDA back in the cradle
Select “Comms” then select “Send MMD data”, the upload will commence automatically

When the upload is complete, the “End” message will appear and the screen will turn green

To return to the main menu select the “OK” in the top right hand corner of the screen.
9.2 Processing Stock Take Data

Click on “Demand” from the menu bar. The following screen will be displayed.

This screen will display all requisition points that have uploaded demand against them, it will also show a summary of the number of records against each requisition point.

NB – Please note all stock-take items are automatically flagged for deletion in the box next to the NPC. If you wish to use the stock-take data to create an order, you must remove the tick from each line.
From the “demand management” screen, click on the “Process” button at the bottom of the screen. The following screen will be displayed.

Click on the “Stock Take” button to convert the data to stock take data. A Stock Take ID will be generated.

To clear the data from the demand management screen click on the “Process” button.

9.3 Stock Take Report

The stock take report will value the items captured in the stock take

Select “Stocktake” from the “Reports” menu within “Stock reports”

The report can be produced in either NPC code, Group Key or base description order. Select the relevant Requisition Point/s and click on generate or to export to Microsoft Excel, click on the Export button.
The last 4 stocktakes are displayed for comparison purposes.

An example report is displayed below.

Click on the printer icon at the top of the screen to print the report. In the exported version of the report the types Stock, External or Internal are expressed in two columns:

<table>
<thead>
<tr>
<th>Local Item</th>
<th>Internal</th>
<th>External</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRUE</td>
<td>TRUE</td>
<td>Internal</td>
</tr>
<tr>
<td>FALSE</td>
<td>FALSE</td>
<td>Stock</td>
</tr>
<tr>
<td>TRUE</td>
<td>FALSE</td>
<td>External</td>
</tr>
</tbody>
</table>
10 Non-stock

10.1 Local catalogue

e-DC can be used to manage items sourced from other suppliers as well as NHS Supply Chain Authority. In order to identify these items they must be added and maintained in the “Local Catalogue”

10.1.1 Creating catalogue items

To create a local catalogue item, from the e-DC menu bar click on “Catalogue”. The following screen will be displayed.

Click on the “Add new product” button and enter the code you wish to enter in the “Product” box. This field is Alphanumeric with a maximum of 20 characters.

NB The catalogue code can not contain spaces, commas (,) or quotation marks (“)
Complete all fields as required: Mandatory fields in red.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base description</td>
<td>Up to 255 characters of text may be entered to describe the item.</td>
</tr>
<tr>
<td>Secondary description</td>
<td>Up to 255 characters of text may be entered to further describe the item.</td>
</tr>
<tr>
<td>E-Class</td>
<td>Used to assign a classification to the product for reporting purposes. You can perform a search on this field by clicking on the dropdown list for all codes or searching on part of the code e.g. A, AA, AAB</td>
</tr>
<tr>
<td>Brand</td>
<td>Enter as required, to a maximum of 40 characters</td>
</tr>
<tr>
<td>European Article Number</td>
<td>Enter as required to a maximum of 14 characters</td>
</tr>
<tr>
<td>Unit of issue</td>
<td>Select the pack size from the drop down box. Defaults to “Each”</td>
</tr>
<tr>
<td>Units</td>
<td>Enter the unit of issue units. Defaults to “1”</td>
</tr>
<tr>
<td>Supplier</td>
<td>Select from the drop down box. (see 10.2 on creating a new supplier)</td>
</tr>
<tr>
<td>VAT Rate</td>
<td>This should be set to the correct VAT rate for the product e.g. 0, 5% or 17.5%</td>
</tr>
<tr>
<td>Contract Reference</td>
<td>Enter as required</td>
</tr>
<tr>
<td>Expense Code</td>
<td>Enter as required</td>
</tr>
<tr>
<td>Ad-Hoc Product</td>
<td>Entering a tick in this field enables this product to be used for free text ordering in Online ordering. NB. you can only have ONE Ad-Hoc product per catalogue</td>
</tr>
<tr>
<td>Manufacturers Product Code</td>
<td>Enter as required to a maximum of 30 characters</td>
</tr>
<tr>
<td>Lead time</td>
<td>Enter as required</td>
</tr>
<tr>
<td>Price</td>
<td>This is a mandatory field and must be inclusive of VAT</td>
</tr>
</tbody>
</table>
Searching for a catalogue item

From the e-DC home page click on “Catalogue”. The following screen will be displayed:

You can search by:

- Scrolling through the pages to find a specific item.
- Entering all or part of the product code in the “Query” box

10.1.2 Amending a catalogue item

From the e-DC home page click on “Catalogue”.

Select all or part of the code required. Select the “Edit” button, make the amendments as required and click on “Save Changes”
10.1.3 Deleting a catalogue item

From the e-DC home page click on “Catalogue”. The following screen will be displayed.

Select all or part of the code required. When product detail is displayed, select the “Delete” button.

Click on the “ok” to confirm deletion and remove any corresponding requirements.
10.2  Supplier maintenance

10.2.1 Adding a supplier

Ensure that the supplier field is blank and then click on the “Add/edit Supplier” icon to the right of the supplier field.

The following screen will be displayed.

Enter details as required and click on “Save”

10.2.2 Amending an existing supplier

Ensure that the supplier you wish to amend is in the supplier field and then click on the “Add/edit Supplier” icon to the right of the supplier field.

Amend details as required and click on “Save”
10.3 Download local Non-stock catalogue

Select MMD, enter your username and password and click on the comms icon

Select download options and then select:

“Download Local Catalogue”

Click on “Load MMD + R.LC”

Your local catalogue details will then be downloaded. It is good practice to do this on a weekly basis to ensure all details are up to date.
10.4 Local Catalogue Report

Select “Local Catalogue” from the “Reports” menu

You can select the print order by selecting an option from the drop down box:

NPC code
Supplier

It is mandatory to enter an NPC from and to range (by selecting From: A - To: Z, will list all NPC’s within the range)

NB If using numeric codes for Non-stock, entering, From 0 (zero) – To Z, will list all you catalogue items.

Click on generate or to export to Microsoft Excel, click on the Export button.
An example report is displayed below.

<table>
<thead>
<tr>
<th>NPC</th>
<th>Base Description</th>
<th>Supplier</th>
<th>Supplier</th>
<th>UOI</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAD072</td>
<td>Highland spring water</td>
<td>0000023</td>
<td>johnson &amp; johnson</td>
<td>Bottle 1</td>
<td>0.85</td>
</tr>
<tr>
<td>ABC12345678901234</td>
<td>long description for a long 17 character code</td>
<td>001</td>
<td>Rod, Jane &amp; Freddy</td>
<td>Bundle 1000</td>
<td>5.00</td>
</tr>
<tr>
<td>ABT002</td>
<td>Prepared feed Cow &amp; Gate</td>
<td>09865765</td>
<td>greene king brewery</td>
<td>Pack 1</td>
<td>9.61</td>
</tr>
<tr>
<td>ABT112</td>
<td>All-in-one pads absorbency banc D17</td>
<td>0000023</td>
<td>johnson &amp; johnson</td>
<td>Pack 1</td>
<td>11.03</td>
</tr>
<tr>
<td>ABT282</td>
<td>Testninnn</td>
<td>0000023</td>
<td>johnson &amp; johnson</td>
<td>Each 1</td>
<td>5.56</td>
</tr>
<tr>
<td>AVM2338</td>
<td>BASE DESCRIPTION</td>
<td>supplier</td>
<td>Each 1</td>
<td></td>
<td>10.00</td>
</tr>
<tr>
<td>BASE679</td>
<td>base</td>
<td>supplier</td>
<td>Pack 1</td>
<td></td>
<td>4.00</td>
</tr>
<tr>
<td>BTB017A</td>
<td>Apron polythene blue</td>
<td>0001</td>
<td>test supplier</td>
<td>Roll 200</td>
<td>5.00</td>
</tr>
<tr>
<td>BTB017B</td>
<td>Apron polythene blue</td>
<td>001</td>
<td>001 again</td>
<td>Roll 200</td>
<td>5.00</td>
</tr>
</tbody>
</table>

Click on the printer icon at the top of the screen to print the report.