

Stock Control

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1. Introduction

- a) Items may be held in stock rather than supplied direct from the supplier. Such items can be entered into the Stock Control section enabling you to
- be warned when stock is getting low
 - run reports to show what needs re-ordering
 - create purchase orders to replace stock
 - produce stock take reports showing quantity and value

There are five stock control systems. This is for trusts that wish to be able to control and monitor stock held in more than one location. In effect, each stock control system acts as another supplier. It just happens that they are in the room next door (or at least quite close)!

We have already set up a supplier for Stock Control 1st System. The reference number is **888** and the supplier name is **STOCK**. If you want to use the 2nd, 3rd, 4th or 5th Systems you will need to create a new supplier in **Utilities – NSI – Suppliers**. Perhaps using reference number 777 for 2nd System and 666 for 3rd System etc. Then, when you are subsequently issuing stock to a patient, you will still create an order for the patient but rather than picking an external supplier in the *Supplier* field, you will select the appropriate Stock supplier. This will all be explained to you fully in the notes that follow.

- b) Each stock item is given a unique stock number (i.e. a code which no other stock item has and which also is not used for OPrice or NSI items) and, before it is entered into the Stock Control section, the

item **must** exist either in OPrice or NSI Items

and the supplier you buy the stock from **must** exist in OPrice or NSI Suppliers

and the price for that item from that supplier **must** exist in OPrice or NSI Prices

- c) You can create multiple entries in Stock Items for one item in OPrice: for instance, the OPrice item M007 (collar) could be entered in Stock Items as

STM007S (collar, small)
STM007M (collar, medium)
STM007L (collar, large)

It is good practice to have separate stock entries for different sizes, in this way, so that when you are warned that stock is getting low you will know which size needs to be re-ordered. Otherwise you need to physically check the stock to find which size is low.

2. Stock items

Menu: Stock Control – 1st System – Items

Each stock item is given a unique stock number (i.e. a code which no other stock item has and which also is not used for OPrice or NSI items) and, before it is entered into the Stock Control section, the

item **must** exist either in OPrice or NSI Items

and the supplier you buy the stock from **must** exist in OPrice or NSI Suppliers

and the price for that item from that supplier **must** exist in OPrice or NSI Prices

The screenshot shows the 'Orthotic Patient Administration System' interface. The main window displays the following information for a stock item:

- Stock No:** LINDA
- Schedule:** M007 Collar in sponge rubber or other material
- Supplier:** 012 Halo Healthcare Ltd
- Description:** SPECIAL COLLAR
- Orthosis Code:** 999999 Other
- UAT Rate:** S **Location:** BIG BIN BY BACK DOOR
- Minimum:** 5 **Maximum:** 30 **Reorder:** 10

At the bottom right, a 'Key' box indicates: Received (white), On Order (green), Cancelled (red).

Below the main information, there are two tables:

Issues				Purchases	
Order:	Date:	Iss:	Ret:	Order No	Qty:
G00259	26/10/1999	11		OPENING27	15
				ST0013	10
				ST0015	10
				ST0019	10

Summary statistics:

Stock:	24	Average	Current
Cost:	£2.01		£2.05
Value:	£48.24		£49.20

Stock being given to patients i.e. Issues.

Replacement stock coming in i.e. Purchases. Orders outstanding are highlighted in green. Cancelled orders are highlighted in red.

Stock level and value of stock based on both current and average cost of the item


Each stock item shows a list of issues and purchases for that item, with transactions that are on order or cancelled shown in different colours, plus the current stock level and values.

Cost is the unit cost; *Value* is the value of the total stock of that item, i.e. $Cost \times Stock$. Purchase prices may change during the shelf life of a stock item: as each item is purchased, its purchase price is remembered by the system and the *Average* figures show the averages for the items currently in stock; the *Current* figures use the most recent purchase price.

Entering a new stock item

Menu: **Stock Control – 1st System – Items**

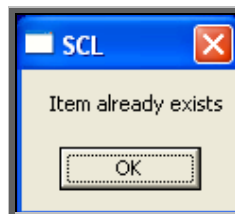
Before you begin to enter new stock items into OPAS it is important to make sure you have all the information at hand. Once you start using the stock item screen you will not be able to exit the screen until all the fields are completed. To ensure this, there is a form in Appendix 7B at the end of this chapter. If this form is completed first for each stock item you wish to add, then you will have all the information required. Appendix 7A shows some examples.

To add a new item, click on the 'enter' icon  (Edit, Enter) and you are first asked at the bottom of the screen for the stock number to be applied to this item:



This is a code, maximum 20 characters, allowing letters, numbers and dashes. The code must not be used for any other stock item, nor a code used in OPrice or NSI. To ensure that the code is not one used in OPrice or NSI, one idea might be to prefix each stock item code with **ST**. Take care when entering this code as it can not be amended later.

If you enter a code that is already being used, you will be told



and the entry will be abandoned. Try again, using a different code.

If the code is indeed unique, you are prompted to continue:



Click on **Yes** if you wish to continue. **DO NOT** continue if you are unsure

- whether the item exists in either OPrice or NSI Items
- whether the supplier you buy the stock from exists in OPrice or NSI Suppliers
- whether the price for that item from that supplier exists in OPrice or NSI Prices
- whether you have entered the stock code correctly (as this cannot be edited later)
- how many of the item you currently have in stock

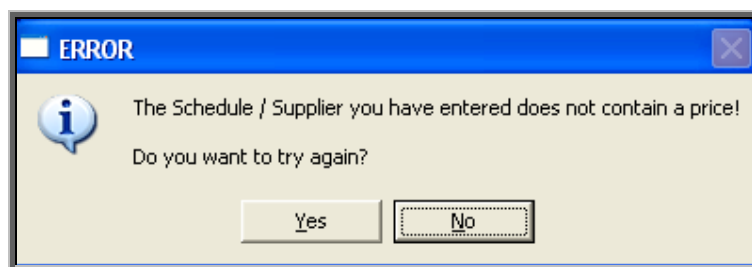
Upon selecting **Yes**, you will be taken into the **Stock Item** screen to complete the fields below. The message **Price not found for this item / supplier** will appear on the screen, but the message can be ignored at this stage.

Schedule select the OPrice or NSI code for the item.

Supplier select the supplier you buy this item from.

If there is not a price within OPrice or NSI for the item from that supplier the warning message **Price not found for this item / supplier** remains and you are returned to *Schedule* to change either the code or the supplier. . As usual, you can press **Tab** to show the list of items and suppliers.

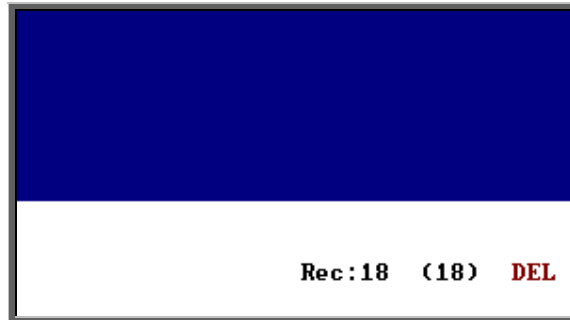
Note: If adding a new item and the supplier/item combination is not valid the following prompt will appear.



Click on **Yes** to return to the screen and try again.

To abandon the screen, click on **No**.

If the screen is abandoned, the incomplete stock item record will be marked as deleted (bottom right corner of the screen).



Once you have set a price up for the item and wish to update the item screen you will need to reactivate (undelete) the record by



clicking on the 'undelete' icon (Edit, Delete). Then the record can be updated.

However, take care – **DO NOT** choose to update the record before the price has been set in OPAS. Once you start editing the stock item screen you will not be able to exit the screen until all the fields are completed successfully.

Once you have selected an item and a supplier which match (i.e. that supplier does supply that item), the warning message disappears and you are prompted for the *Description*.

Description is your description for the stock item and can be anything you like: it does not have to match the description held in OPrice. The *Description* will default to the *Description* of the stock item that was on the screen when you started to add the new item. This is to help cut down on the amount of typing when adding the same item several times with different sizes. Either edit the *Description* or press **F8** and type a new one.

Orthosis Code select the appropriate code from the list.

Vat enter the default vat rate for the item

S standard
E exempt
Z zero-rated
R reclaim.


Location If you have a large stock room you may wish to indicate where the item is stored.

<i>Minimum</i>	enter the minimum stock level required. Items that are at or below this stock level are shown on the low order report for reordering.
<i>Maximum</i>	enter the maximum stock of this item that you wish to hold.
<i>Reorder</i>	this is the suggested minimum quantity to be ordered and will appear as a default quantity when you raise a purchase order for replacement stock.

You are then asked for the *Opening stock*. This is the stock you currently hold of this item. If you do not know, and cannot find out quickly how many are in stock, enter **0** (Zero) and correct the quantity later by doing a manual transaction ([see Stock Control - Note 16. Stock transactions](#))

3. Updating a stock item

Menu: Stock Control – 1st System – Items

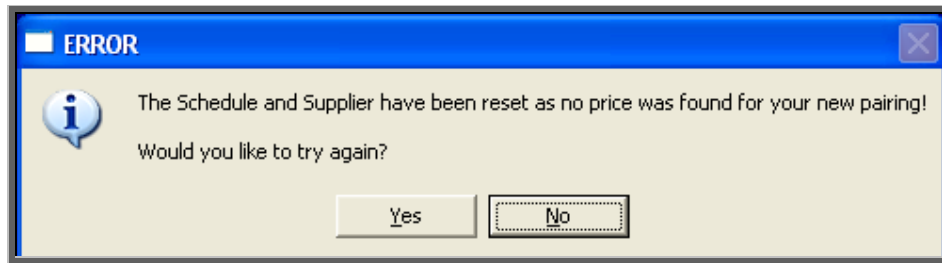
Find the relevant stock item and then click on the ‘update’ icon  (Edit, Update).

The *Stock No.* cannot be changed once created. If you do need to change the *Stock No.* you will have to create a new stock item and then delete the old stock item.

The following fields can be changed:

<i>Schedule</i>	<i>Location</i>
<i>Supplier</i>	<i>Minimum</i>
<i>Description</i>	<i>Maximum</i>
<i>Orthosis Code</i>	<i>Reorder</i>
<i>Vat Code</i>	

If you update the *Schedule* and/or *Supplier* with an invalid combination the following prompt will appear.




To abandon the screen leaving the information as it was before, click on **Yes**.
Click on **NO** to return to the screen and try again.

Note: Amending your current stock level is achieved by adding a manual transaction (see [Stock Control - Note 16. Stock transactions](#))

4. Deleting a stock item

Menu: Stock Control – 1st System – Items


Find the relevant stock item and then click on the 'delete' icon  (Edit, Delete) and the box below will appear.



If you still want to delete this record select **Yes**. Otherwise select **No**.

On confirming deletion, that stock item record is marked as deleted.

Stock:	3	
	Average	Current
Cost:	£49.33	£299.83
Ualue:	£147.99	£899.49
Rec:1 (1) DEL		

The stock item remains in the file and, if deleted by mistake, can be undeleted by simply clicking on the 'delete' icon  (Edit, Delete) again.

If you want to permanently remove the record, then having marked the record for deletion, click on Edit and select Krunch. This procedure cannot be reversed and will permanently remove all stock items that are marked as deleted. It will not, however, remove any orders where the item was used and issues and purchases of that item can still be seen in **Stock Control – 1st System – Transactions**.

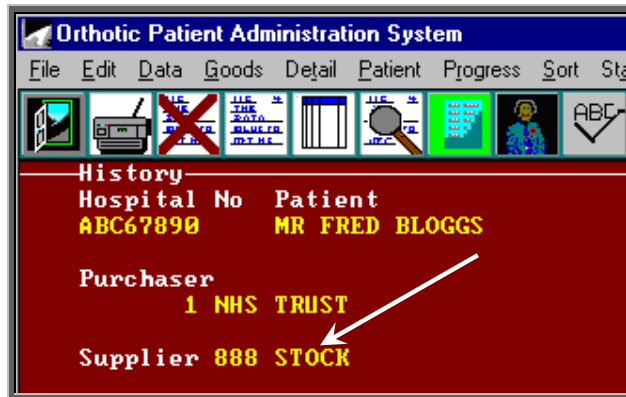
5. Issuing stock

Menu: Patients

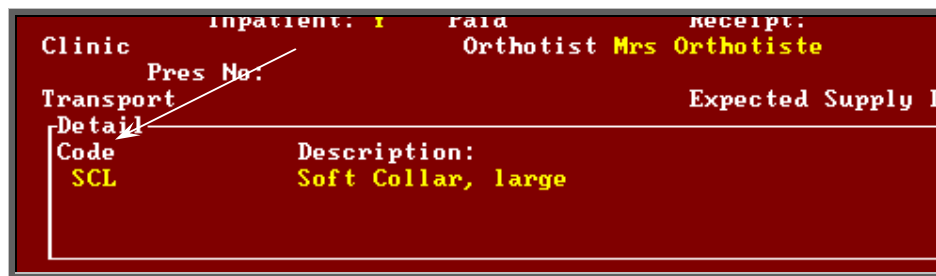
When an item that you hold in stock is issued to patient you still need to add an order from the patient screen (as you would if you were having to order the item from a supplier - **see Orders - Note 2. Adding an order**).

However,

- when you reach the *Supplier* field you need to select the relevant stock system. If you are holding stock in just one location and therefore are only using **1st System**, then this will be supplier (supplier code) 888 (supplier name) Stock.



- when you reach the *Code* field in the Details box you need to select the Stock No for the item (as set up in the **Stock Items** screen – see **Stock Control - Note 2. Stock items**) and not the OPrice/NSI schedule code for that item.



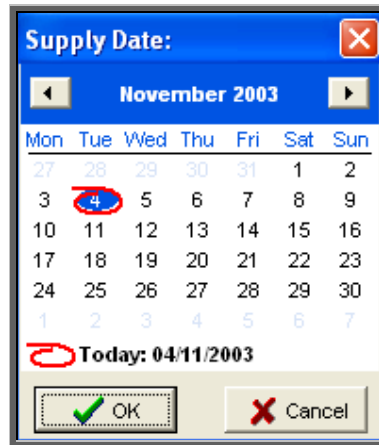
- when you press **Ctrl-Enter** to finish entering the order you will be asked if you wish to update the Stock Control system.



If you select **No**, stock control will not be updated and the *Status* of the order will show as 'On order'. If you subsequently revisit the order and mark the order as being supplied (by clicking on **Goods**, **Supplied** at the top of the **Orders** screen) the *Status* of the order will change to 'Supplied' and stock control will be updated then.

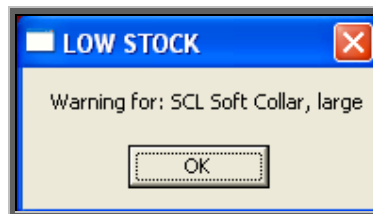
If you select **Yes**, you will then be asked to select the date the goods were supplied. Today's date will be highlighted but this can be

changed if necessary. (Press **Cancel** here if you wish to abandon updating stock control.)

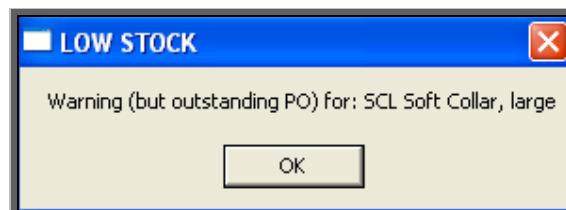


The date entered here will be placed in the *Supplied* field, the *Status* of the order will show as 'Supplied' and the stock control system will be updated by reducing the amount held in stock.

If the stock control system sees that you are below minimum level on that stock item, the following warning message will appear so that some more can be ordered.



If the stock control system sees that you are below minimum level on that stock item but that a stock purchase order has been raised, the following warning message will appear.




If the stock control system sees that you are out of stock on that stock item, regardless of whether there is an outstanding purchase order or not, the following warning message will appear.



6. Raising a stock purchase order

Menu: Stock Control – 1st System – Purchases

It is within the **Purchases** section of **Stock Control** that purchase orders are raised for ordering replacement stock. This is also where goods are marked as received and invoice details entered.

To raise a stock purchase order, click on the 'enter' icon  (Edit, Enter).

<i>Date</i>	shows as today but can be changed if required.
<i>Order No</i>	the next order number in sequence shows, but can be changed if required.
<i>Supplier</i>	is selected from the list of suppliers.
<i>Invoice</i>	at this stage the supplier's invoice has not been received, so leave this blank.
<i>Dated</i>	if <i>Invoice</i> has been left blank, this is bypassed
<i>Call Off</i>	If a call off number has been entered for the Supplier (Utilities – Choices – Finance – Accounts), it will appear here automatically. You can however, enter a call off number manually if necessary.
<i>Stock no</i>	select from the list of items. If the stock item selected is not set up within Stock Control – 1st System – Items as being purchased from the supplier selected above then the following message will appear at the bottom of the screen:



Press any key to remove the error message and then either change the stock item or, by using **F3**, move back to the supplier field and change the supplier.

If the item is valid for the supplier selected, then the *Description*, *Orthosis Code*, *(V)at code* and *Each* (i.e. Cost each) will be filled in for you.

Qty shows as the reorder quantity on the stock item record, but can be changed if required.

Total is calculated for you (*Each* x *Qty*)

You will then be taken onto the next line so that the next item can be selected. When you have finished entering items, press **Esc** to remove the stock item pop-up menu.

Notes: additional information can be entered

Press **Ctrl-Enter** to finish.

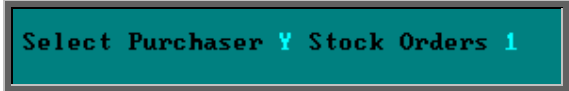
When the order is first raised, the lines on the order will be **highlighted in green** to indicate that they are on order. The green highlight will be removed when you subsequently inform OPAS that the goods have been received.

7. Printing purchase orders

The purchase order can be printed instantly as the order is raised, or manually.

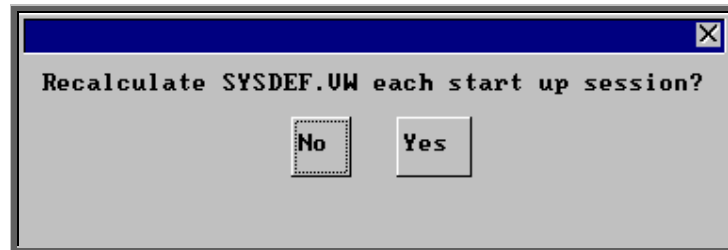
a) Instant printing

If you want each individual order to print automatically when you have finished inputting it, go into **Utilities – Choices – System** and enter the number of copies required in the *Stock Orders* field.




Select Purchaser Y Stock Orders 1

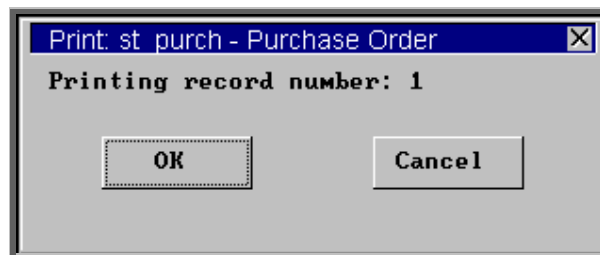
Press **Ctrl-Enter** to save the changes made. The following prompt will appear.



Press the **Enter** key.

b) Printing manually

To print the order, click on the 'print' icon  (File, Print) and select **Purchase Order** from the drop down menu.



OPAS will confirm which stock order it will print. Click on OK to continue.

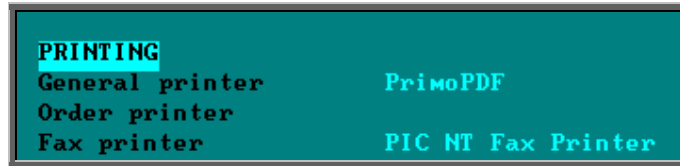
This option is also used for reprinting purchase orders.

8. Faxing purchaser orders

Individual suppliers can be set up to have their orders faxed directly to them.


Note: This uses the same functionality that is used for faxing patient orders, so you do not need to change any settings if faxing is already switched on.

To be able to fax orders direct to the supplier, your computer must have a fax driver and this needs to be entered in the *Fax printer* field in the system parameters screen (Utilities – Choices – System)



Menu: Utilities – Choices – History – Fax

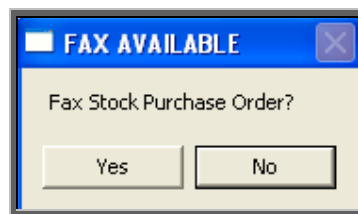
If you wish to fax orders to all suppliers then leave this screen blank. Otherwise, specify those suppliers you wish to fax to by adding them in this screen.

To specify particular suppliers for faxing, click on the 'enter' icon  (Edit, Enter).

Find the supplier in the pop-up list and press **Enter**.

That supplier will be added and the pop-up list will appear again to choose another supplier. Continue to select suppliers until you have specified all those that you wish to fax to. Then press **Esc** to remove the pop-up list and then press **Esc** twice more to come out of the Fax screen.

Once a supplier has been identified as a fax supplier, whenever an order for that company is entered onto OPAS, you will be asked after completing the order if you would like to fax it straight away.



If **No** is selected, you will still have the opportunity to fax the order later individually.

Select **Yes** to fax the order.



On clicking **OK**, your fax software will be launched. The fax number can then be typed into the send fax screen of your fax software.

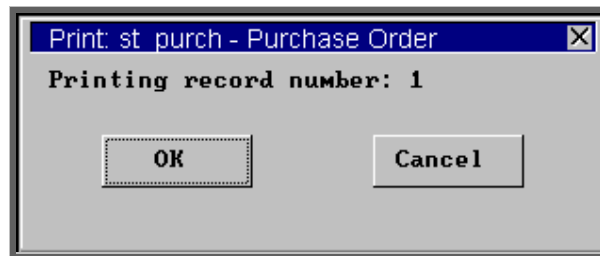
The supplier number should remain at the bottom of the **Order** screen until the fax is sent. We are aware though that some fax software clears the fax number from the **Order** screen prematurely, so it would be advisable to make a note of the fax number when the above box appears in case this should happen. Once you know that the number remains, you will not have to make a note of the number in future.

Re-faxing orders

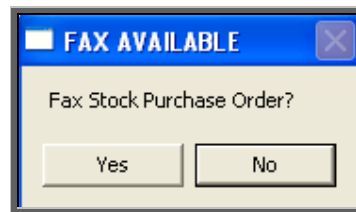
The purchase order can be re-faxed at anytime by clicking on the 'print' icon



(File, Print) and select **Purchase Order** from the drop down menu.



OPAS will confirm which stock order it will print. Click on **OK** to continue.



Select **Yes** to fax the order.



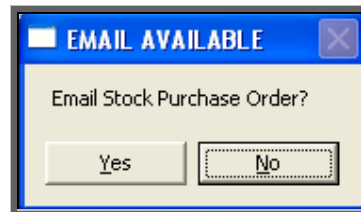
On clicking OK, your fax software will be launched. The fax number can then be typed into the send fax screen of your fax software.

9. Emailing purchase orders

Individual suppliers can be set up to have their orders emailed directly to them.

Note: This uses the same functionality that is used for emailing patient orders, so you do not need to change any settings if emailing is already switched on (*see Orders - Note 11. Emailing Orders*).

Once a supplier has been identified as an email supplier, whenever an order for that company is entered onto OPAS, you will be asked after completing the order if you would like to fax it straight away.



If you do not wish to e-mail the order, click on **No**.

If you do not e-mail the order now, you can always do it later.

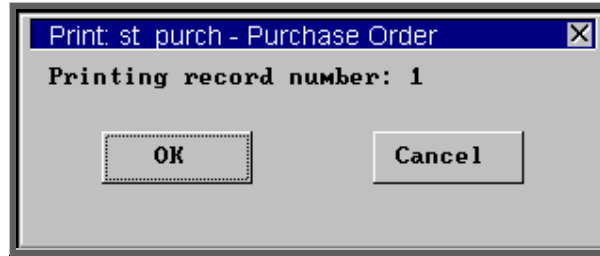
If you wish to e-mail the order, click on **Yes**. The order will be sent to the OPAS Mail Daemon and then on to your e-mail software. If your e-mail software is not currently running, it is likely that it will prompt you to open your e-mail system so that the order/message can be sent.

Re-emailing orders

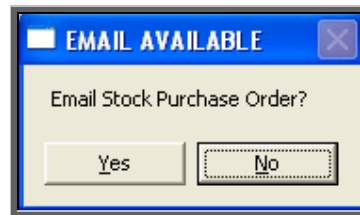
The purchase order can be re-emailed at anytime by clicking on the 'print' icon



(File, Print) and select **Purchase Order** from the drop down menu.



OPAS will confirm which stock order it will print. Click on OK to continue.




Select Yes to email the order.

Note: Orders can only be e-mailed to suppliers that have been set up in **Utilities – Choices – History – E-mails**.

10. Amending a stock purchase order

Menu: Stock Control – 1st System – Purchases

Find the relevant purchase order and then click on the 'update' icon  (Edit, Update).

All the fields can be changed as required; extra items can also be added if they have been missed off the order. Lines can also be deleted from the order by moving down to the relevant line and pressing **Ctrl-F8**.

11. Cancelling a stock purchase order

Menu: Stock Control – 1st System – Purchases

So that the order shows as cancelled in the stock **Purchases** screen and **Items** screen, you need to cancel the order lines individually.

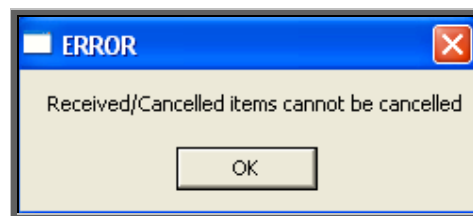
Find the relevant purchase order and then click on **Items** at the top of the screen. You will now see an **Items** screen for each line that is on the order. If there is more than one line on the order, move forwards and backwards through the **Items**

screens using the ‘arrow’ icons  and  (**F6** and **F5**).

Once you are looking at the line that you wish to cancel, click on the ‘delete’ icon

 (**C**ancel).

You cannot cancel lines if the goods have been received (or if you have previously cancelled them).



Once the line has been cancelled, the *Status* field on the **Items** screen will show as **Cancelled** and when you return to the main purchase order screen (by pressing

Esc, clicking on the ‘exit’ icon  (**F**ile, **R**eturn) the lines that you have cancelled will be **highlighted in red**.

Also, when you next go into **Stock Control – 1st System – Items** the order number will be highlighted in red so that you can see from that screen too that the line has been cancelled.

Issues				Purchases	
Order:	Date:	Iss:	Ret:	Order No	Qty:
G00123	20/10/1997	13		OPENING12	12
G00192	27/10/1998	2		ST0009	20
G00199	13/01/1999	1		ST0014	10
				ST0017	10

12. Purchase order numbers

Each stock system can have its own prefix for its purchase order numbers.

Menu: Utilities – Choices – Default



Find default Numbers 66- 70 and click on the 'update' icon (Edit, Update).
At the bottom of the screen you will be asked to type in the New Default.

Type in the formula below where "??" is the prefix required, and press **Enter**.

```
= "??" | right(str(100000) + [count], 4)
```

This should be set for you during your Stock Control training. Contact the OPAS helpdesk if you need help.


13. Booking goods in

Menu: Stock Control – 1st System – Purchases

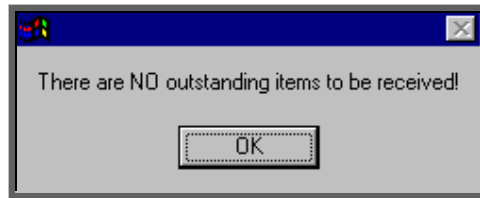
When the goods arrive you need to return to the purchase order and book the goods in so that Stock Control knows that they are now in stock and available.

You have the ability to book the whole order in, the remaining outstanding items or individual lines.

a) Booking in the whole order/remaining outstanding items

Find the purchase order and then click on the 'good in' icon  (Receive).

This will mark all outstanding items on the order as being received. If all the items have already been booked in (i.e. there are no order lines highlighted in green) you will get the following message.



Once items have been marked as received

- the date they were received will be entered in the *Received* field (to the right of the *Total* field) N.B. This may not be visible to some of you without moving to the right of your screen with the right arrow key on your keyboard.
- they will no longer be highlighted in green.

b) Booking in individual lines

Find the purchase order and then click on the word Items at the top of the screen.

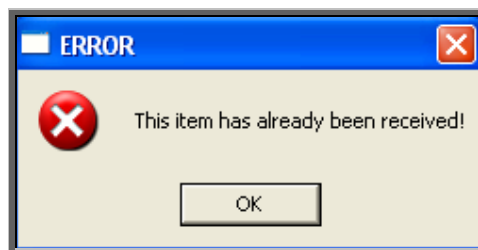
You will now see an Items screen for each line that is on the order. If there is more than one line on the order, move forwards and backwards through the Items

screens using the 'arrow' icons  and  (F6 and F5).

Once you are looking at the line that you wish to book in click on the 'goods in'

icon  (Receive).


If the line has already been booked in the following message will appear.



Once the line has been received

- the *Status* field on the *Items* screen will show as **Received**
- the *Received* field will show today's date
- the *By* field will show who booked the goods in

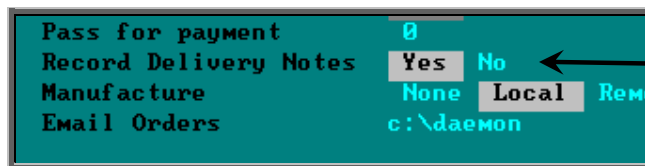
and when you return to the main purchase order screen (by pressing **Esc**,

clicking on the 'exit' icon  (File, Return)

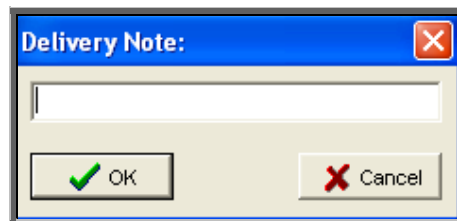
- the date the lines were received will be entered in the *Received* field (to the right of the *Total* field) N.B. This may not be visible to some of you without moving to the right of your screen with the right arrow key on your keyboard.
- the lines that you have booked in will no longer be highlighted in green.

c) Recording delivery notes

If the *Record Delivery Notes* field is switched on in the system parameters (**Utilities – Choices – System**), then delivery notes can be recorded on Stock orders as well as on Patient orders.



If the *Record Delivery Notes* field is set to **Yes**, the following prompt will appear.



Enter the delivery note number and click on **OK**, or if there is no delivery note with that particular order simply click on **Cancel**.


(The delivery note number is held on the item screen, which can be accessed by clicking on the word *Item* above the icons on the **Purchase Order** screen.)

Status	Received
Received:	02/07/2008
By:	LINDA
Delivery Note:	22445

14. Entering invoice details

Menu: Stock Control – 1st System – Purchases

When you receive an invoice from the supplier for the stock, the purchase order can be updated to show those invoice details.

Find the relevant purchase order and then click on the ‘update’ icon  (Edit, Update).

Invoice move down (by pressing **Enter**) to the *Invoice* field and type in the Invoice Number.

Dated type in the invoice date. It will default to today’s date, but this can be changed.

Check that the information is correct in the items box. You can change Stock No., Qty and add additional lines if required. If the details are correct, move the cursor down the Stock No: column (with the down arrow key on the keyboard) until you reach the first blank line. Press **Esc** to remove the pop-up list of Stock Nos: and then press **Enter** to move to the *Discount:* field.

Discount enter any discount that you may have received on the invoice.

Postage enter charges made for postage and/or packing if any, and then press **Ctrl-Enter** to finish.

15. Passing stock invoices for payment

Menu: Stock Control – 1st System – Purchases

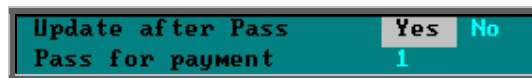
Once the **Purchases** screen has been updated with invoice details the next step is to pass the invoices for payment. There are two purposes for doing this:

1. To produce a report listing those invoices that are being passed for payment.
2. To mark the invoices with today's date so that you know when the invoice was passed on to you Finance Department for payment.

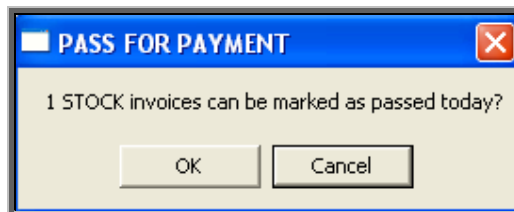


Click on the 'print' icon (File, Print) and select **Pass for payment**.

The system will then find those invoices that can be passed to the accounts department for payment (i.e. those invoices that have an invoice date entered and that have not been passed already) and prints a list of those invoices. As with all reports, the layout of this list can be modified if required. Within the system parameters (**Utilities – Choices – System**) you can set the number of copies of this report needs to be printed. If you do not wish to print this report when running pass for payment, enter a 0 in this option. (Note: this parameter also controls the number of copies of the pass for payment report for non-stock invoices)



You are then asked to confirm that these invoices should be marked as passed for payment:



If you select **OK**, those invoices printed on the list will be marked as passed for payment by inserting today's date in the *Paydate* field on the **Purchases** screen.

Lines:	1	Items:	10	Value:	£170.10
Passed:	02/07/2008	Discount:			
Notes:		Postage:			+ UAT
		UAT:		£29.77	
		Grand:		£199.87	

If you select **No**, those invoices will not be marked as passed and will appear on the report again the next time **Pass for payment** is run

16. Stock transactions

Menu: Stock Control – 1st System – Transactions

Whenever a stock transaction takes place (i.e. by the issuing of items to patients or the purchasing of stock), a transaction record is automatically created that can be viewed here.

There are times, however, when the need arises to raise a transaction manually. For instance, during stock take when a difference is noted between the number shown on the system and the number actually in stock or for moving stock between Stock Control Systems (i.e. from 1st System to 2nd System)

To create a manual stock transaction, click on the 'enter' icon  (Edit, Enter).

Stock No: enter the Stock No that you need to raise a transaction for (pressing **Tab** will show a list to select from

Iss: this means issue, i.e. reducing the number in stock. Type the number of items issued or the number by which the stock is to be reduced by.

Ret: this means return, i.e. increasing the number in stock. Type the number of items received or the number by which the stock is to be increased by.

Iss: and Ret: are alternatives: do not type a number into both of them!

Date: enter the date of the transaction. **F2** will enter today's date.

The following fields may or may not be relevant: e.g. if the change is due to a stock check, there is no particular patient or order, so these fields can be left blank

Purchaser: select from the list or if not relevant, press **Esc** and then **Enter**

Referrer: select from the list or if not relevant, press **Esc** and then **Enter**

Patient: if relevant, press **Tab** and select from the list, otherwise press **Enter**

Order: if relevant, press **Tab** and select from the list, otherwise press **Enter**

A new blank transaction screen will appear. If you have no more transactions to enter then press **Esc**.

Alternatively, press **Ctrl-Enter** to save and exit the screen at any point after the *Date:* field.

17. Low stock

Menu: Stock Control – 1st System – Items

This prints a list of stock items that are at or below the minimum stock levels. A separate page will be produced for each supplier to make purchasing of replacement stock easier.

To produce the report, click on Lowstock at the top of the screen.



Once the data has been found you have the option to see the report on screen, to be printed or sent to a file for exporting into Lotus 123 or MS Excel

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select **Screen**, **Printer** or **File**. Make another selection or press **Esc** again to return to the menu.

Printer

The report will be sent to the printer. You will then have the option to re-select **Screen**, **Printer** or **File**. Make another selection or press **Esc** again to return to the menu.

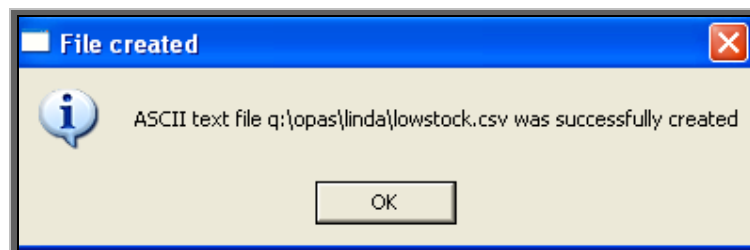
Below is an example of the **Low Stock** report.

Stock No:	Schedule:	Stock:	Minimum:	Maximum:	Reorder:	On Order
TTT111	A1a	-1	1	1	1	1

The report layout (`lowstock.dfr`) can be altered to your requirements. Please contact the OPAS helpdesk.

File

A comma separated variable file will be created called `lowstock.csv`. This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.




This report can also be run from **Reports – Stock – Low Stock**

18. Totals

Menu: Stock Control – 1st System – Items

This shows the total cost of your current stock, both averaged over the actual historical purchase prices and the replacement cost (i.e. using the current purchase prices). It will also show the number of items below minimum and above maximum levels.



Click on the 'totals' icon  (Totals), and the information will be displayed on the screen.

Totals Results	
Average Cost	£1,802.14
Replacement Cost	£1,229.74
Items below minimum	3
Items above maximum	6

This can be printed by pressing **Alt-P**.

19. Stock Values Report

Menu: Stock Control – 1st System – Items

The stock values report will show for each stock item

- the quantity currently in stock
- the value of the stock item (based on the price paid)
- the cost of replacing the stock item (based on current price)



To run the report click on the 'print' icon (File, Print) and select **Custom Report** from the drop down menu.

Click on the word This_view at the top of the screen to show those reports that can be run from this screen.

Highlight ST_VALUE and click on Run.

A print box will appear in the middle of the screen offering to send one copy to the printer. You can amend the number of copies required or select the information to be sent to the screen instead here. To proceed, click on **OK**.

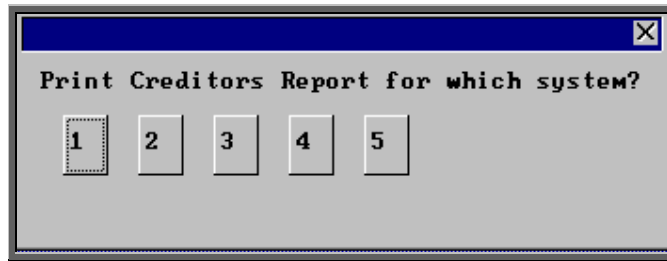
Stock No:	Description:	Qty:	Cost :	Replace:
SCL	Soft Collar, Large	38	£205.58	£77.90
SQM	SOFT COLLAR MEDIUM	44	£111.32	£90.20
SCXL	SOFT COLLAR EXTRA LARGE	26	£69.42	£53.30
MBCM	MEDIUM SOFT COLLAR	32	£91.84	£65.60
A000001	ERI UVERYERUGH	3	£875.34	£886.14
ESK03	SK KNEE BRACE SMALL	3	£69.00	£0.00
ESK05	SK KNEE BRACE MED	0	£0.00	£0.00
AFOBL	Post Op Slipper Large	2	£6.00	£0.00
AFOBM	Post Op Slipper Medium	12	£36.00	£0.00
LINDA	SPECIAL COLLAR	24	£48.24	£49.20
OGB10M	ANALOG HYA	6	£282.00	£0.00
SCS	Surgical Collar Small	4	£7.40	£7.40
SCBL		16	£0.00	£0.00
Grand Total			£1,802.14	£1,229.74

20. Batch Reports

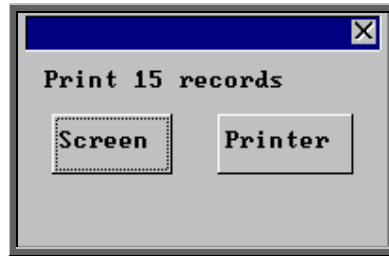
As well as the reports that can be run from various stock screens, the following reports are available from the **Reports** menu.

a) Creditors

Menu: **Reports – Stock – Creditors**



Select which stock system the report is to be run for.



Once the data has been found you have the option to see the report on screen or to be printed

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

Printer

The report will be sent to the printer. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

Below is an example of the **Creditors** report.

Stock Purchases System 1 Orders Received but not invoiced Printed 02/ 07/ 2008						
Order ed	Recei ved	Order No	Suppl ier	Net :	YAT :	Grand :
19/ 05/ 1998	25/ 08/ 2000	ST0011	012	28.70	5.02	33.72
06/ 08/ 1998	25/ 08/ 2000	ST0012	012	57.40	10.05	67.45
26/ 10/ 1999	25/ 08/ 2000	ST0013	012	20.00	3.50	23.50
25/ 08/ 2000	25/ 08/ 2000	ST0014	012	41.00	7.18	48.18
25/ 08/ 2000	25/ 08/ 2000	ST0015	012	20.50	3.59	24.09
25/ 08/ 2000	25/ 08/ 2000	ST0016	012	20.50	3.59	24.09
25/ 08/ 2000	11/ 10/ 2000	ST0017	012	61.50	10.76	72.26
10/ 10/ 2000	10/ 10/ 2000	ST0019	012	790.48	138.33	928.81
06/ 07/ 2004	Part only	ST0021	012	823.20	144.06	967.26
13/ 01/ 2008	13/ 01/ 2008	ST0024	001	12.34	2.16	14.50
13/ 01/ 2008	13/ 01/ 2008	ST0025	001	12.34	2.16	14.50
13/ 01/ 2008	13/ 01/ 2008	ST0026	001	12.34	2.16	14.50
13/ 01/ 2008	20/ 04/ 2008	ST0027	001	61.70	10.80	72.50
06/ 02/ 2008	Part only	ST0019.1	012	340.20	59.54	399.74
19/ 04/ 2008	02/ 07/ 2008	ST0028	012	170.10	29.77	199.87
Grand Total				2,472.30	432.66	2,904.96

The report layout (stcredit.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

b) Low Stock

Menu: Reports – Stock – Low Stock

This prints a list of stock items that are at or below the minimum stock levels. A separate page will be produced for each supplier to make purchasing of replacement stock easier.

Print Creditors Report for which system?

1 2 3 4 5

Select which stock system the report is to be run for.

Print 5 records

Screen Printer File

Once the data has been found you have the option to see the report on screen, to be printed or sent to a file for exporting into Lotus 123 or MS Excel

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select **Screen**, **Printer** or **File**. Make another selection or press **Esc** again to return to the menu.

Printer

The report will be sent to the printer. You will then have the option to re-select **Screen**, **Printer** or **File**. Make another selection or press **Esc** again to return to the menu.

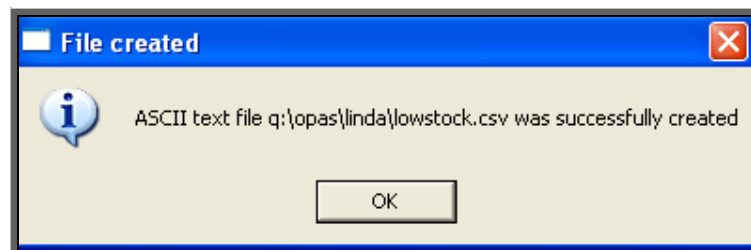
Below is an example of the **Low Stock** report.

Stock (1) at or below minimum level for :						
001 Arden Orthotics						
Lowstock Report Stock System 1						
Stock No:	Schedule:	Stock:	Minimum:	Maximum:	Reorder:	On Order
Description:						
TTT111	A1a	-1	1	1	1	1

The report layout (`lowstock.dfr`) can be altered to your requirements. Please contact the OPAS helpdesk.

File

A comma separated variable file will be created called `lowstock.csv`. This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



c) Progress

Menu: Reports – Stock – Progress

This report interrogates your Stock Purchase Orders and finds those that have not yet been received.

- select the Stock System required
- select the Supplier required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Supplier field empty will result in all suppliers being selected
- enter the Start date of the required date range in the format DD MM YYYY
- enter the End date of the required date range in the format DD MM YYYY

Once the data has been found you have the option to see the report on screen or to be printed

Below is an example of the Progress report.

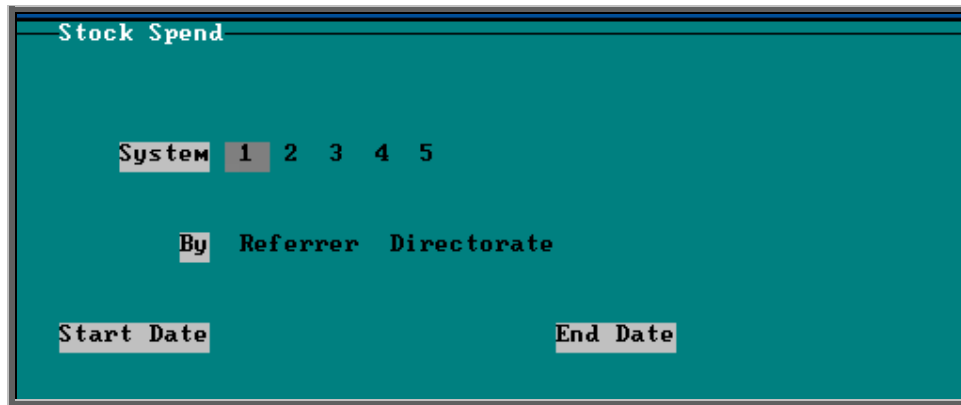
Stock Progress - System 1						
ALL SUPPLIERS						
01/01/2000 - 05/06/2008						
Supplier	Order Date	Order No	Stock No:	Description:	Qty:	
Arden Orthotics	04/06/2008	ST0029	TEST	TEST	25	
Halo Healthcare Ltd	06/02/2008	ST00181	SCL	Soft Collar, Large	10	
Halo Healthcare Ltd	06/02/2008	ST00191	SCM	SOFT COLLAR MEDIUM	10	

The report layout (st_prog.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

d) Spend

Menu: Reports – Stock – Spend

This report lists items that have been supplied.



Stock Spend

System 1 2 3 4 5

By Referrer Directorate

Start Date End Date

- select the Stock System required
- select whether the report should be analysed by Referrer or Directorate
- enter the Start date of the required date range in the format DD MM YYYY
- enter the End date of the required date range in the format DD MM YYYY



Once the data has been found you have the option to see the report on screen or to be printed

Below is an example of the Spend report selecting Referrer.

Stock Spend Report - Stock System 1				
02/ 01/ 2008 - 31/ 01/ 2008				
By Referrer				
Referrer	Date:	Patient	Stock No:	Price
	13/ 01/ 2008	BFTRDSX1457	TEST	12.34
	13/ 01/ 2008	NG0325118	TEST	12.34
			Total	<u>24.68</u>
Mr Surgeon	10/ 01/ 2008	NX232323	TEST	12.34
	13/ 01/ 2008	NG0325228	TEST	12.34
			Total	<u>24.68</u>
Direct Access GP	10/ 01/ 2008		STM25X16A	12.34
	10/ 01/ 2008		TEST	12.34
	13/ 01/ 2008	NS7654321	TEST	12.34
			Total	<u>37.02</u>
			Grand Total	<u>86.38</u>

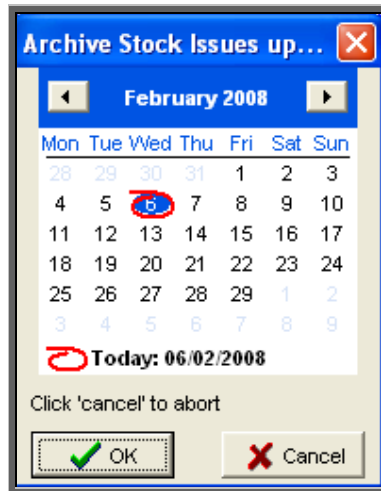
The report layouts (st_sp_co.dfr and st_tr_di.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

21. Archiving

Once you have been using stock control for several years, you may notice that going into the stock **Items** screen becomes increasingly slow. This is due to all the transactions that are held on the **Items** screen in the **Issues** and **Purchases** tables. For this reason, we have an archive facility in the stock control system which should be run on a regular basis (like the appointment archive).

Menu: **Stock Control – Archive.**

A calendar prompt will appear. Select the date transactions should be archived up until.



Having selected the date, all manual and issue transactions before that date will be archived, **and** any purchase orders that have a *Passed* date (so only purchase orders that have been passed for payment) prior to that date.

The **Issues** and **Purchases** tables on the **Items** screen will be updated with a brought forward archive balance to represent those transactions that have been archived.

Issues				Purchases	
Order:	Date:	Iss:	Ret:	Order No	Qty:
Archived	01/01/2008	45		Archived	53
				ST0012	10
				ST0014	10
				ST0017	10
				ST0018	10
				ST0020	10

Archived transactions can still be viewed using **Stock Control – 1st System – Archived – Purchases** and **Stock Control – 1st System – Archived – Transactions**.

