NHS Supply Chain

Online Catalogue and Ordering

Guidance Notes

Version 2.8
August 2017

NHS Supply Chain

Contents

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General information

What's new?

It is now possible to request an email notification when an out-of-stock item becomes available. This option is only available for stock products (not Blue Diamond, eDirect or Framework products). See 'Out of stock' on page 20.

The email notification is sent to the email address of the person requesting it (currently logged in to Online Catalogue) as recorded in that person's user account at the time the request is generated. This means that if you change your email address between making the request and the product becoming available, the notification will go to the previously recorded email address.

Key to icons

Product information icons	
	Blue Diamond – non-stock item delivered by NHS Supply Chain – lead time is specified
	eDirect – processed by NHS Supply Chain, delivered by supplier – lead time is specified
	item that has been classified as using sustainable resources
	electro medical item
	ethically sourced product
	product subject to COSHH
	commitment discount scheme
	WEEE directive
	product information is available
Order management and general icons	
	authorise an order
	edit an order
	delete line from order or favourite, delete order or favourite
	display calendar
	cancel date

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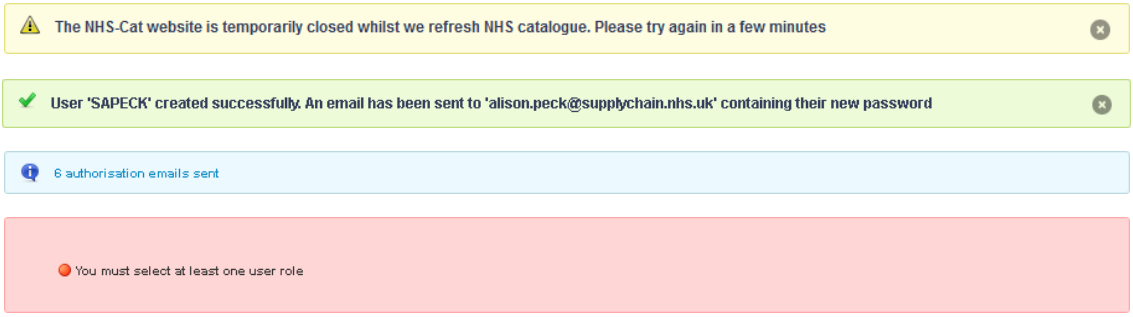
System messages

System messages are shown towards the top of the web page. Notifications are shown in yellow, confirmation messages in green, information in blue and errors in red.



Abbreviations and glossary

AWSL	Available While Stocks Last
consignment stock	Products ordered and held by trusts but that are still owned by suppliers. Invoices are raised for these products when they are used.
COSHH	Control of Substances Hazardous to Health
EDI	Electronic Data Interchange (orders received from customers' purchase order systems)
GLN	Global Location Number – a number that uniquely identifies a physical location, such as a requisition point
GTIN	Global Trade Item Number – a globally unique number (up to 14 digits) used to identify trade items, products or services
HDS	Home Delivery Service
MPC	Manufacturer's Product Code
NCP	Nationally Contracted Products
NPC	National Product Code
PAN	Priced Advice Note

Examples used in this document

Information in this document is taken from our test system. Any correlation to actual orders is purely coincidental. Product codes, descriptions, images and prices are not to be used when ordering.

Overview

Online Catalogue & Ordering enables you to browse the catalogue of items available to you and to create an order by adding items to your shopping trolley. As well as adding items from the catalogue, you can request products using their unique NPC (National Product Code). For frequently ordered products, you can:

- Save them as favourites, so you can find them again quickly
- Create standing orders, simplifying the order process.

Who uses it?

Online Catalogue & Ordering is used by authorised individuals within your trust to order supplies for a designated area.

Individuals are granted access to a trust, and then to specific locations (requisition points) within that trust – they can only create orders for those requisition points.

Each user of the system is granted one or more 'roles' – these enable that person to carry out various tasks. For example, some people can authorise their own orders (up to a specified amount), while others require authorisation from someone else before the order can be submitted. The allocation of these roles is under the control of the trust, and the roles are described in more detail in 'Roles' on page 55.

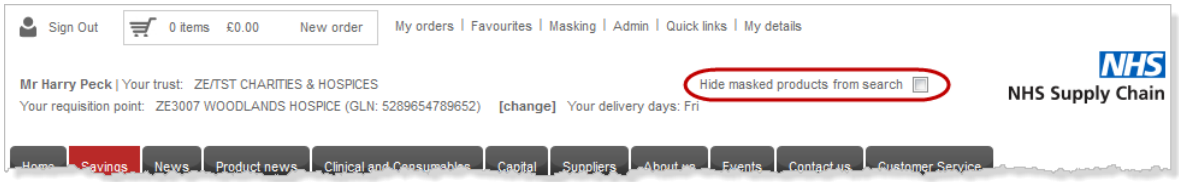
Trust administrators must ensure that only authorised individuals have active user accounts and must amend those accounts when necessary to reflect changes in working practice or job role. For more information, see 'What are the responsibilities of trust administrators?' on page 56.

Entering and viewing information

Similar methods for viewing and entering information into the Online Catalogue & Ordering application are used throughout it. These are summarised in this section.

Hide masked products

An option at the top of the page (above the black menu) enables you to hide masked products from search results. Masked products are those products that your trust does not enable you to order but which do exist in the catalogue. Depending on your position, you may wish to see these products (so you can ask for a change in policy) or hide them to reduce the number of items returned from a search.



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Select items from a list

If you need to select multiple entries from a list, you can:

- Click the first item you want, hold down the SHIFT key and then click the last item to select a range
- Hold down the CTRL key while you click items to select multiple items that are not next to each other in the list

Some lists only allow you to select a single item.

Move items between one box and another

To move items between lists of available items (not yet selected) and selected items:

1. Select the items you want to move.
2. Click the arrow (**<** or **>**) to move the items in the appropriate direction.

If you want to move all the items, click the **> All >** or **< All <** buttons.

Sort a list

In many cases, you can click on the column heading to sort information by that column value. For example, if the column contains dates, earlier dates will be shown at the top of the list.

Click the column heading again to reverse the order. Using the same example, later dates will now be shown at the top of the list.

You can sort a listing by any column heading that is underlined.

View additional information about products

If additional information is available for a product, this is often provided as a PDF file. You must have a PDF reader (for example, Acrobat Reader from Adobe) installed on your computer to read it.

Stock and non-stock products

Stocks are held at the distribution centres of many of the products available for order through NHS Supply Chain. When you place an order, stock held at your local centre is used to fulfil your requirements.

Some products that are delivered by NHS Supply Chain are not stocked by us. When you place an order, the supplier packs the products you have ordered and sends them to your local distribution centre for shipping with the rest of your order. These products are known as 'Blue

Diamond' products and are marked in the catalogue with a small blue diamond ◆. You usually have to allow a little extra time to get Blue Diamond products as there is an extra step in the process.

Finally, you can order some items that are not stocked or delivered by NHS Supply Chain. These products are delivered directly to you by the supplier, are known as eDirect products and are marked with a small purple icon e.

Managing your local settings

Parts of the **Admin** menu – where local settings are managed – are only available to people with appropriate roles (*Trust administrator*, *Requisition point maintenance* and *User maintenance*).

Trusts can maintain some details themselves to reflect their internal structure and working practices. These details include:

- User accounts – the trust can create and amend user accounts, giving access to appropriate parts of the system to individuals. See 'User accounts' on page 53 for more information.
- Requisition points – as a trust changes, new requisition points may be required and others may be need to be de-activated. See 'Requisition points' on page 61 for more information.
- Catalogue masking – the trust may wish to prevent the ordering of some items to reflect its internal financial and procurement policies. See 'Masking parts of the catalogue' on page 65 for more information.

Financial coding

The **Financial coding** menu is only available to those with either the *Financial coding* or *Financial coding administration* roles.

Online Catalogue & Ordering enables you to code purchases for financial reporting purposes, associating requisition points with cost centres and expense code with products. For more details, see 'Financial coding' on page 70.

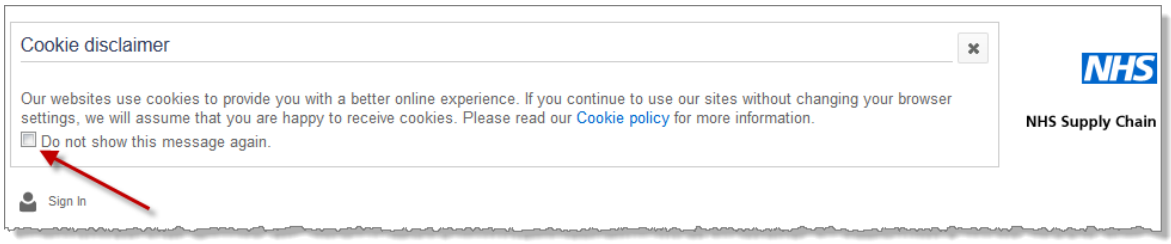
Logging into the online systems

You can log into Online Catalogue & Ordering from any computer with an internet connection.

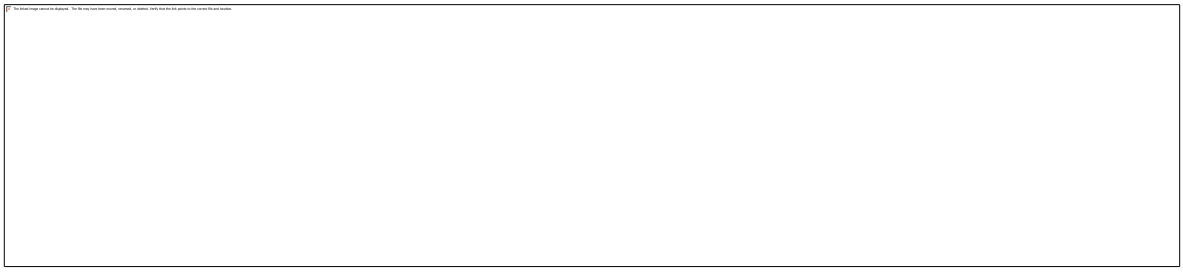
You can browse the catalogue without logging into Online Catalogue & Ordering – but you cannot place orders or access any information relating to your trust, including previous orders.

1. If necessary, connect to NHSNet so you can connect to the internet.
2. Open your web browser.
3. Type **http://www.supplychain.nhs.uk** into the address bar at the top of the browser. Press ENTER.

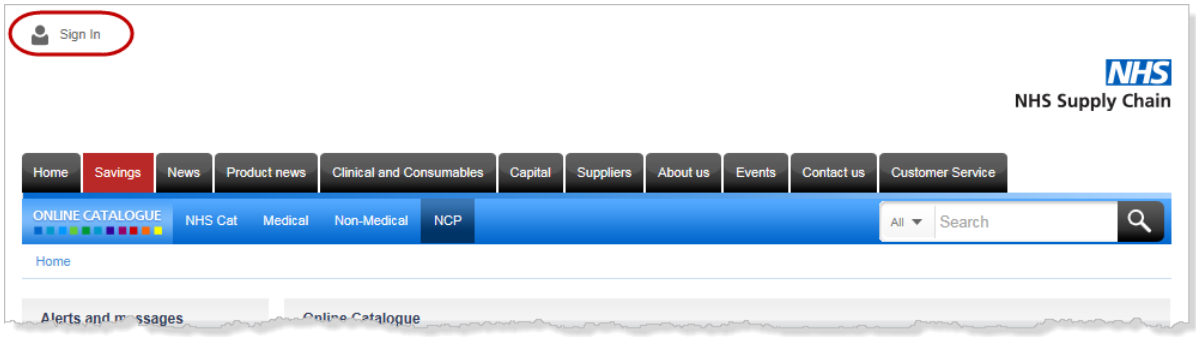
   The NHS Supply Chain Home page opens, with a 'Cookie disclaimer' at the top of the page – you can select **Do not show this message again** to prevent this message being shown every time you visit the site.



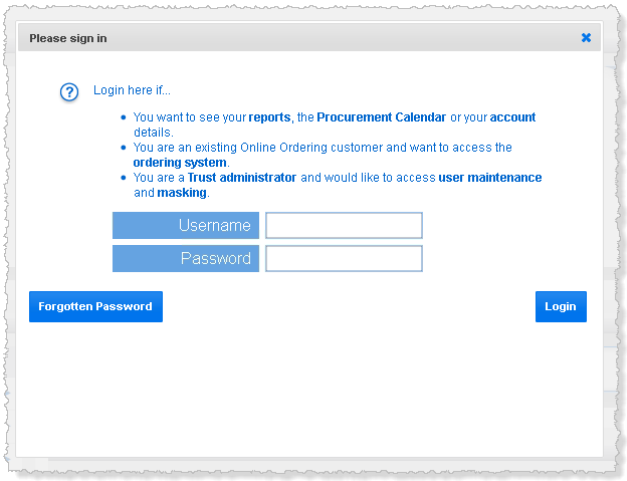
4. Select **Online Catalogue & Ordering** from the blue menu bar.



5. Click **Sign in** in the top left of the web page that opens.



6 Type your username and password into the boxes provided.



7 Click **Login**.

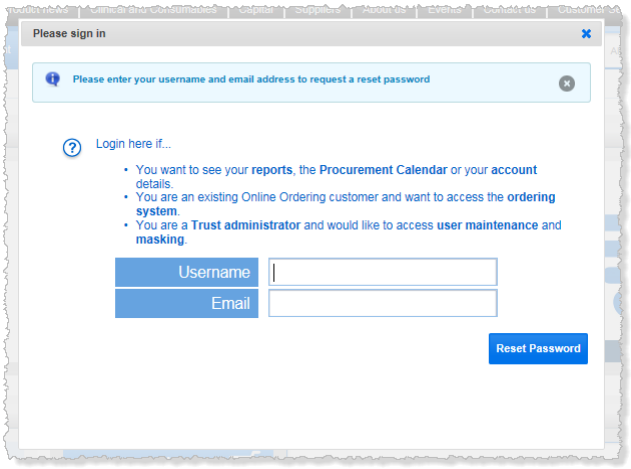
If you see a message offering to 'remember' your password for you, select the option that does not remember it. This is very important for security.

Forgotten your password?

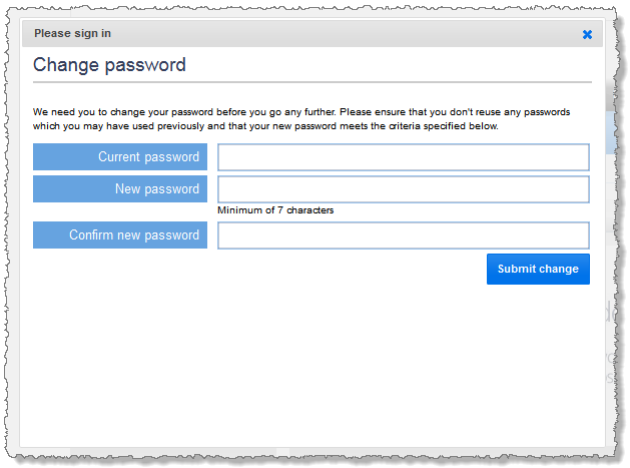
Type your username into the box and click **Forgotten Password**.

Password is replaced with **Email**. Type your email address into the box and click **Reset Password**.

You must specify the email address associated with your user account.



A new password is emailed to you. Click the link in the email and enter your new password to logon. Before you can do anything else, you have to change your password to something you have not used before. Click **Submit change** to change your password.



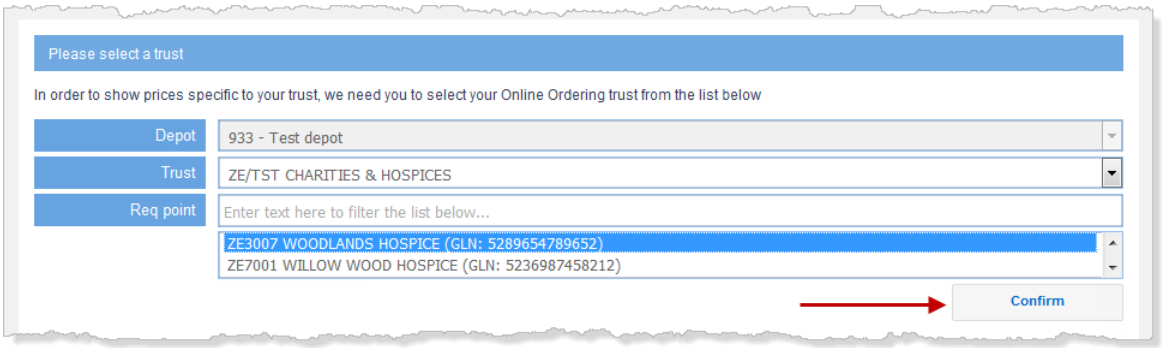
Selecting your trust and requisition point

The first time you log on to Online Catalogue & Ordering, you will have to select your trust and requisition point. Most people only have access to one trust, and it is shown automatically. If you have access to more than one trust, choose one from the drop-down list.

Below the trust is a list of requisition points that you can access. You can only work with one requisition point at a time, and you cannot do anything until you have selected one. If you only have access to one requisition point, this is selected for you.

At the bottom of this page is a list of the roles you have been assigned (see 'Roles' on page 55). The options available to you throughout the rest of Online Catalogue & Ordering depend on these roles – you may be able to see different menu options to a colleague, for example.

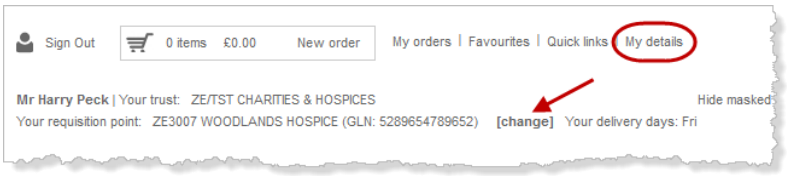
Click **Confirm** – your selections will be used every time you login to Online Catalogue & Ordering until you change them.



You can double-click a requisition point to select it instead of clicking **Confirm**.

Once you have selected your trust and requisition point, Online Catalogue & Ordering remembers this information and displays it at the top of the page, immediately below your name.

If you have access to more than one trust or requisition point, click **change** to open the page that enables you to select a different one to work with.



Viewing your details

The options available to you at the top of the page vary depending on the roles you have been assigned, but the one on the right is always **My details**. Select this option to see information about your access and any financial limits that have been set.

Your trust administrators are listed below your details, together with email addresses and telephone numbers should you need to contact them.

Signing out

You must sign out of Online Catalogue & Ordering when you are not using it. The **Sign out** option is available in the top left corner of every page.

Browsing and searching the catalogue

You can access the catalogue in a number of different ways on the **Home** page, highlighted on the image below.

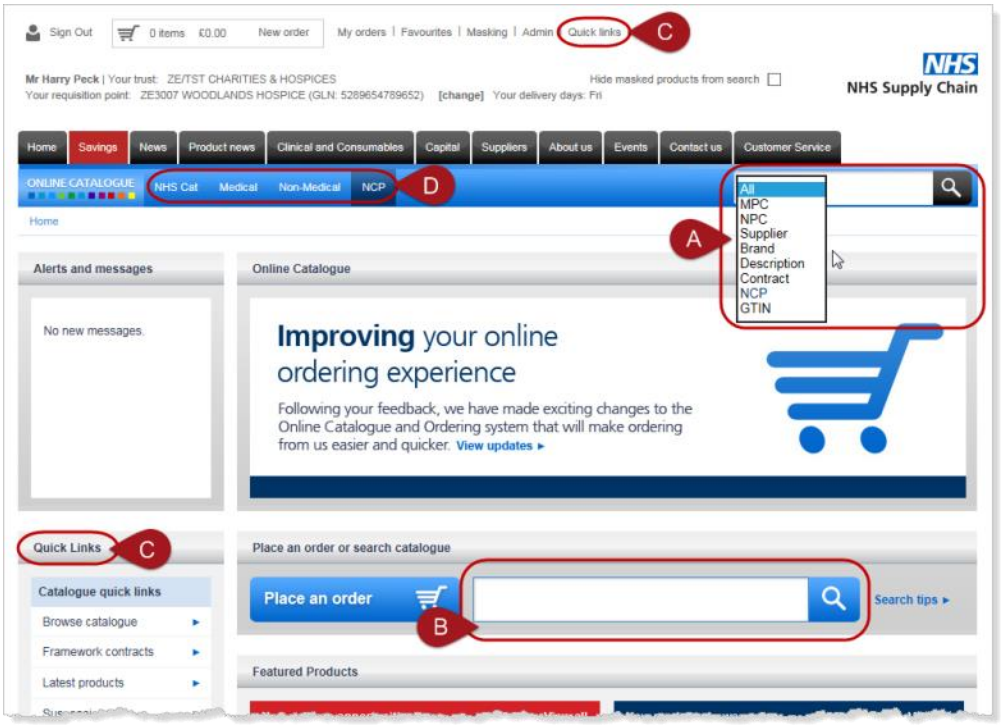
To search the catalogue, do one of the following:

- Select the information you want to use to search from the drop-down list and type the relevant information into the box at the top right of the page. (**A**)
- Type a product's National Product Code (NPC) or its name into the box towards the middle of the page (**B**), to the right of the **Place an order** button.

In both cases, click the adjacent **Search** icon to start the search.

To browse the catalogue, select a 'Quick link' (**C**) either from the list on the left of the page or the link at the top and then select a section of the catalogue. The **Catalogue Quick Links** on the left and the **Quick link** options are the same.

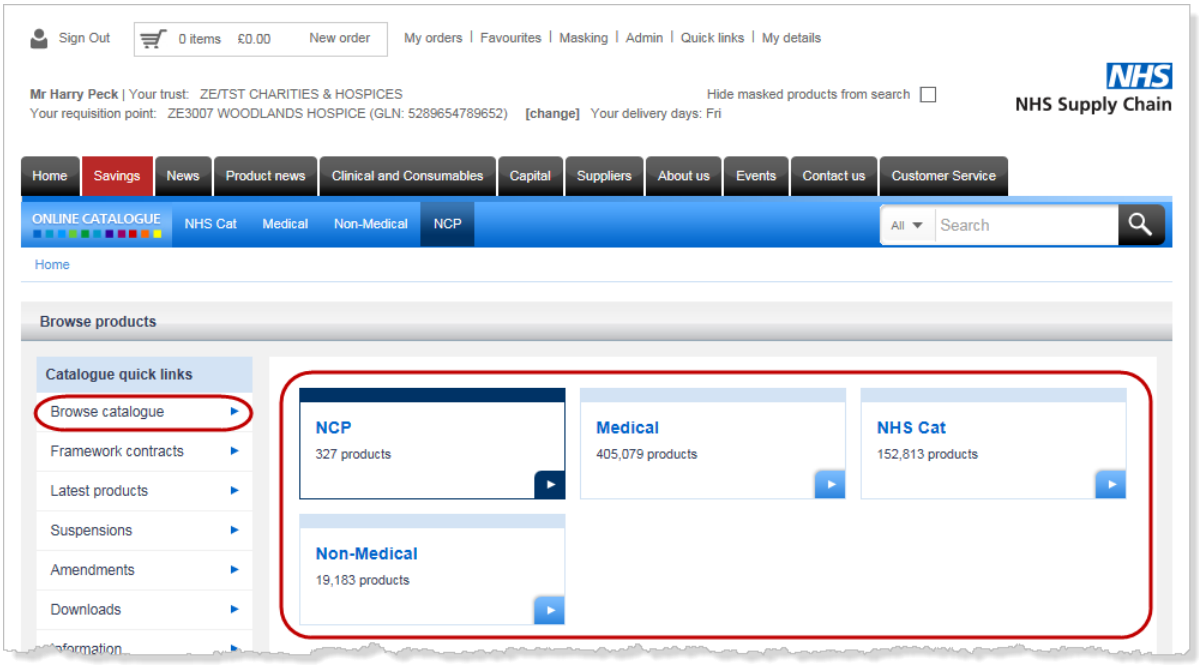
- **Medical** and **Non Medical** are the two top-level divisions of products supplied by NHS Supply Chain. See 'Viewing the medical and non-medical sections' below for more information.
- **NHS Cat** products are those made available to trusts by suppliers where the orders are *not* processed by NHS Supply Chain. See 'Viewing NHS Cat (Framework) products' on page 16 for more information.
- **NCP** contains only nationally contracted products.



You can also select the section of the catalogue from the options on the blue menu bar (**D**) and then immediately select the area you want from the menu.

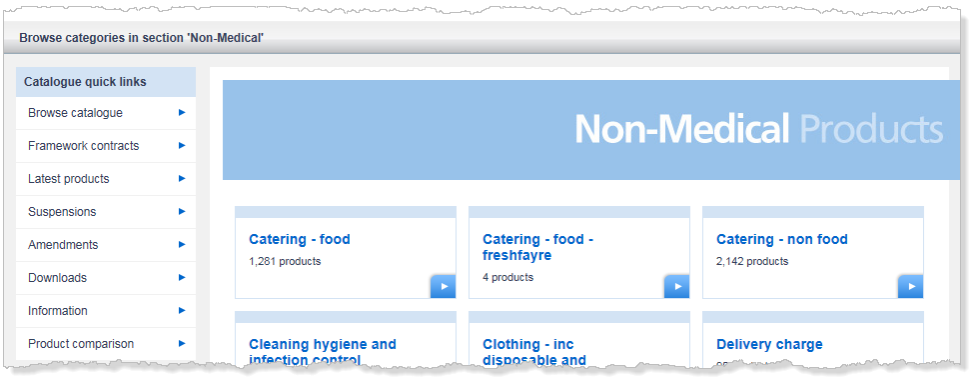
Selecting a catalogue section

After clicking **Browse catalogue** in 'Quick Links', select the section of the catalogue you want to browse from main part of the page.



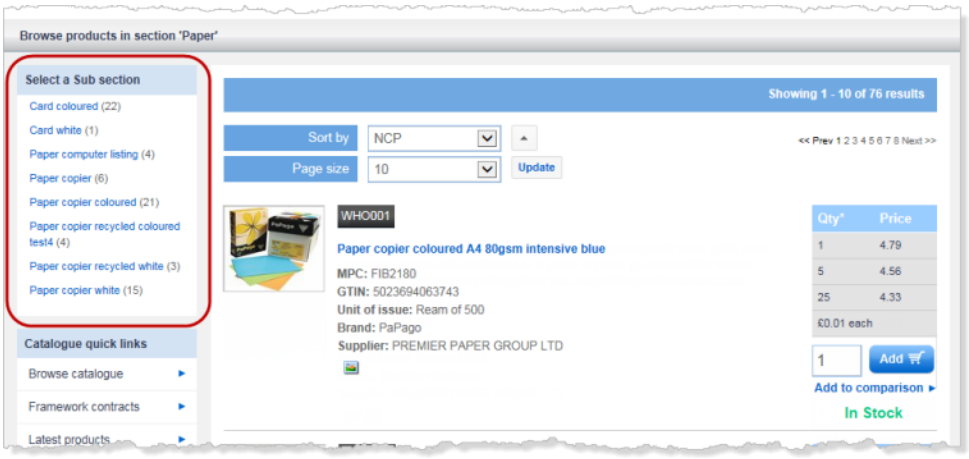
Viewing the medical and non-medical sections

After selecting either **Medical** or **Non-Medical**, all the categories it contains are displayed. The example below shows the categories in the non-medical sub-section.



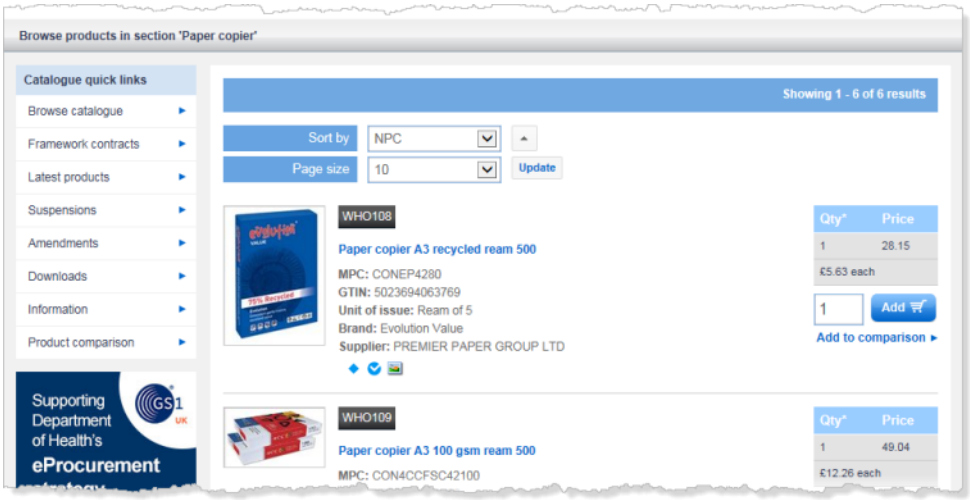
Selecting a category displays the sub-categories of products within that category. This set of sub-categories shows the number of products each contains.

When you select a sub-category, further divisions are shown in the list on the left of the page.



Continue to narrow the range of products until you are in a sub-category that contains a manageable list or no further sub-divisions are possible.

The example below shows **Paper Copier**, selected from the options above. Further sub-divisions are now available.



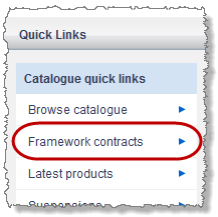
If an image of the product is available, it is displayed on the left of the product details. The product NPC is in a dark box, and icons indicating that the product belongs to a particular category are shown below the product details.

Viewing NHS Cat (Framework) products

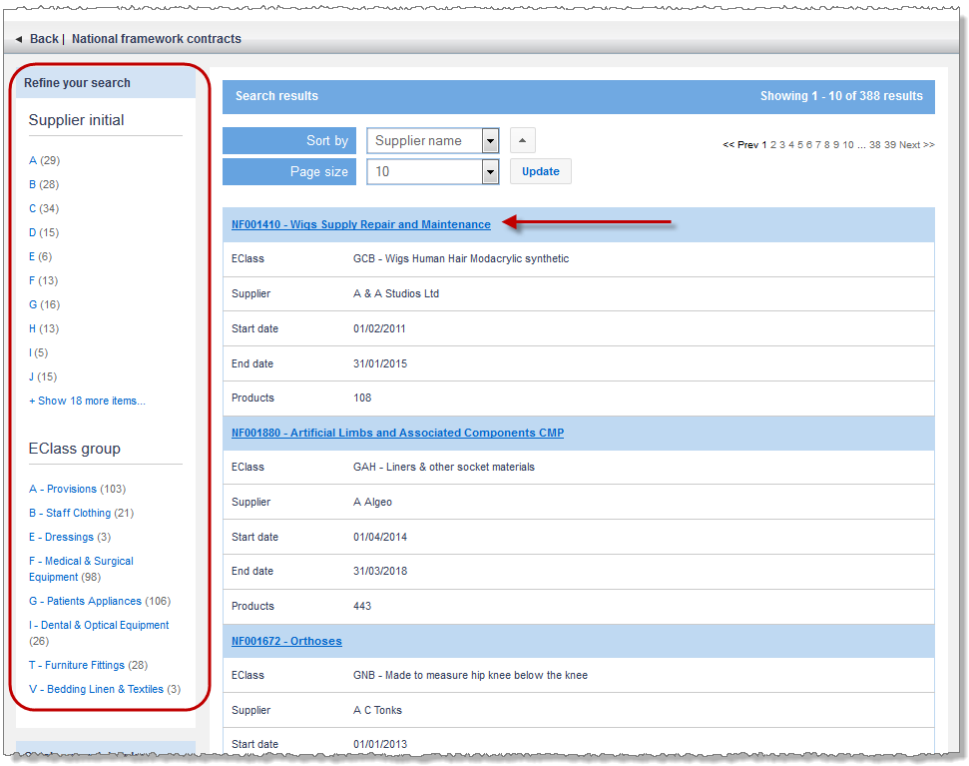
NHS Cat products are also known as Framework products.

Although NHS Cat products can be accessed from the **NHS Cat** section of the catalogue, there are no sub-divisions when accessed in this way.

To see categories for these products, select **Framework contracts** from **Quick Links**.



Refine your selection using the options shown on the left of the page, then select a category (indicated by the arrow below). The products in that category are shown in the same way as medical and non-medical products are shown.



Viewing NCP products

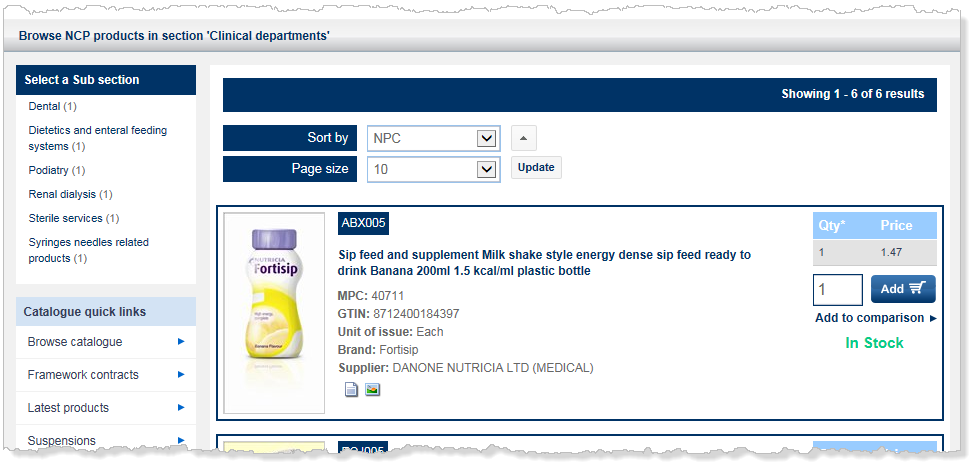
Nationally contracted products (NCP) are highlighted in dark blue wherever they appear in the catalogue.

Nationally contracted products are a core set of NHS products to be used by all NHS provider trusts. This means they are also seen when **Medical**, **Non-Medical** or **NHS Cat** are selected.

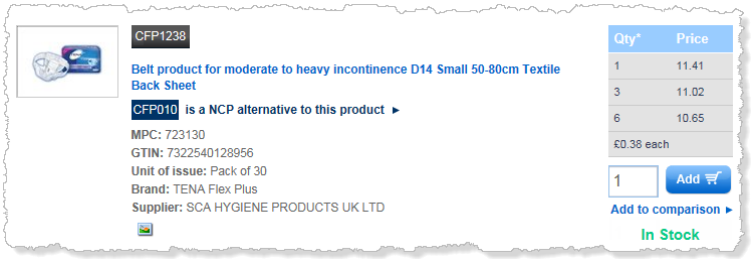
To browse **only** NCP products, either:

- Select **NCP** on the blue menu bar, and then select the category of NCP products from the list displayed.
- From **Quick Links**, select **Browse Catalogue**, and then select **NCP**. Select a product type from the tiles in the main part of the window.

Once a product type has been selected, sub-sections of that product type are show in the box on the left of the page.



Any alternative products that are on the NCP list are automatically offered, as shown in the example below.

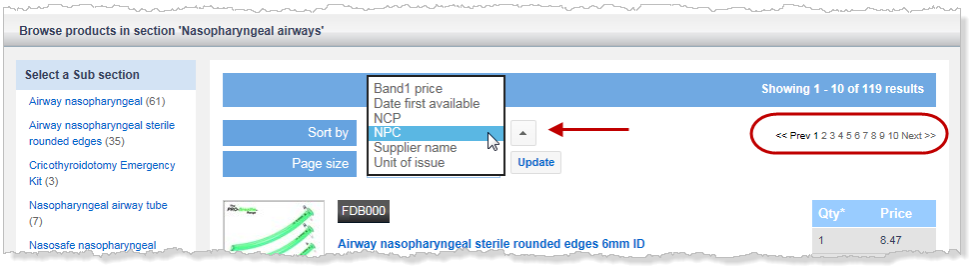


Sorting products

You can choose how you want the display to be sorted and how many products you want to see on each page.

Click the button indicated by the arrow below to switch between ascending and descending sorting by the selected criterion.

Moving from one page of entries to another is done by clicking on the page numbers on the right above and below the list of products.



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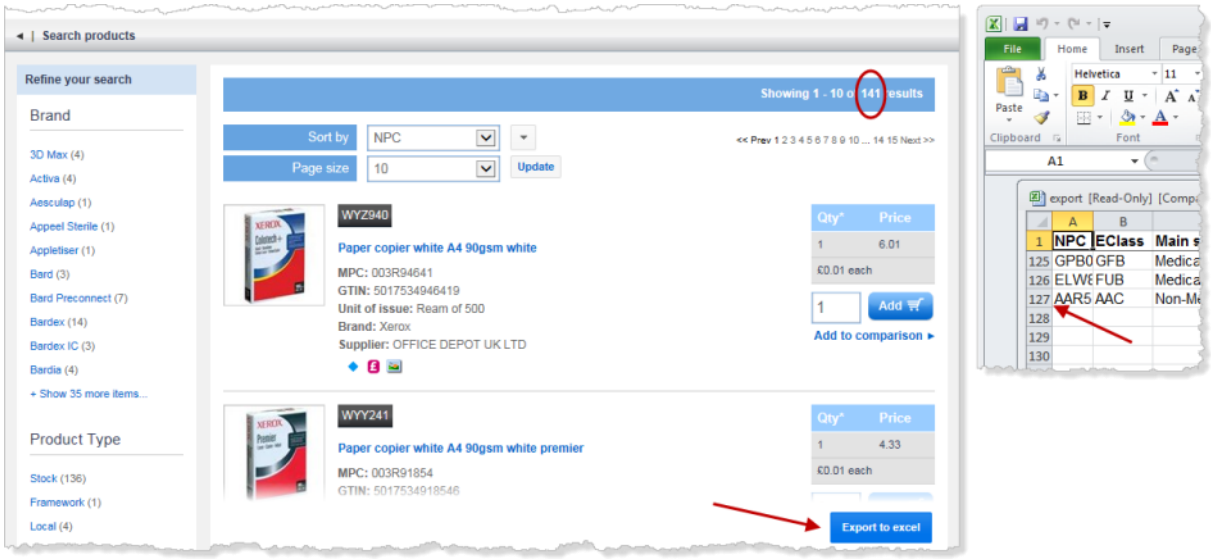
Products that your trust does not normally allow you to order (masked products)

Masked products are those that your trust does not normally (unless you have the *Mask override* role) allow you to order. If you are including masked products in search results, they are clearly identified by a statement – in red – immediately below the product name.

Exporting product details

You can export products in a category or from search results in Excel format. The option to export to Excel is at the bottom of the list of products. You are given the option of opening the exported information immediately or of saving it for future use.

Unavailable products are not exported so the number exported may be lower than the number reported as present in the category or found by the search. In the example below, the web page shows 141 results for the search but the spreadsheet only shows 126 products (127 minus the heading row).



Adding products to an order

You can add products to an order from here by clicking the **Add** button, assuming you have logged in to the Online Catalogue & Ordering application – see 'Adding products to your shopping trolley' on page 22.

Out of stock

Whether a stock product (not Blue Diamond, eDirect, local or Framework products) is currently available is clearly indicated. An 'Out of Stock' message in red or an 'In Stock' message in green is clearly shown.

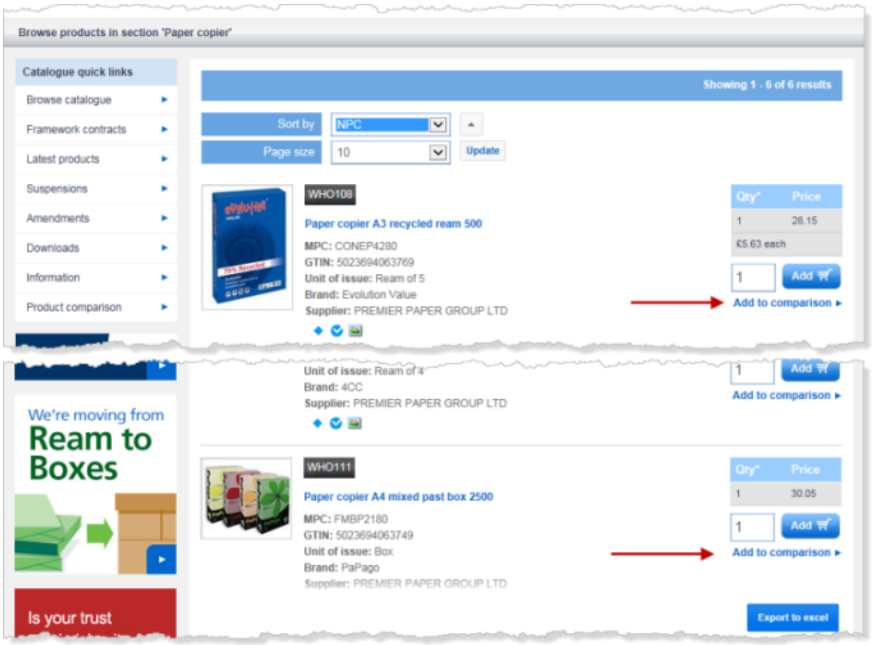
Stock status is calculated hourly, so actual stock levels may differ from those displayed at the time of ordering.

You can still order a product marked as 'Out of Stock', but delivery may be delayed. This gives you the opportunity to order an alternative instead.

If you prefer, instead of ordering now, you can click **Email me**. An email message will be sent to you when the product becomes available. The email address used is the one recorded in your account when the request is made – if you change your email address, you will not be notified unless you click **Email me** again.

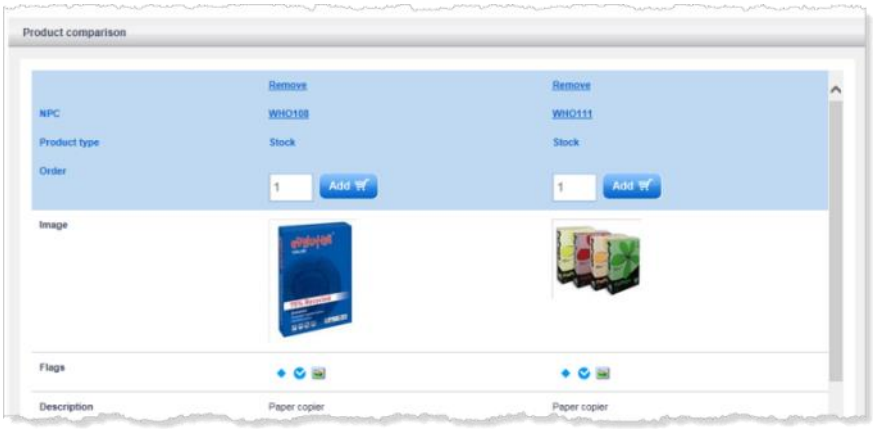
Comparing products

You can also compare multiple products by clicking **Add to comparison** below the **Add** button. You can compare up to 10 products.



To view the products you have chosen to compare, click **Product comparison** in the list of **Catalogue quick links** on the left of the page.

A table shows the products you have selected for comparison. From here you can add them to your order.



Creating an order

If you have the *Favourite only ordering* role, you will only be able to create orders from a favourite.

You can create orders in a number of ways:

- You can order directly from the catalogue, adding items to your trolley (see ‘Adding products to an order’ on page 19).
- You can complete an online order form.
- You can select a favourite as the basis for your order (see ‘Favourites’ on page 41 for more information).

You can only work on one order at a time. If you click **New order** without either saving or submitting the order you are working on, you will lose the information it contains.

Adding products to your shopping trolley

You can browse the catalogue as described in ‘Browsing and searching the catalogue’ on page 14. Assuming you have logged in, you can add products to your trolley by specifying the quantity and clicking the **Add** button to the right of the product description.

‘In Stock’ and ‘Out of Stock’ messages are not shown for Blue Diamond, eDirect, local or Framework products. Stock status is calculated hourly, so actual stock levels may differ from those displayed at the time of ordering.

From the order form, you can search for products in the catalogue by using the **Search catalogue** option in the blue band above the order form on the right.

To see the current contents of your shopping trolley (which opens as the order form described below), click the trolley or **View Order** at the top of the page:

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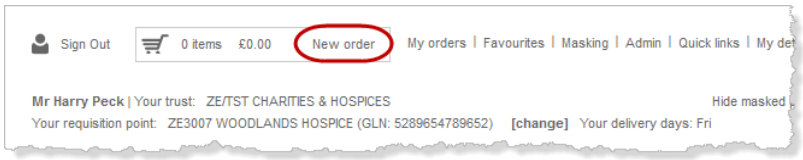
Completing the online order form

If you are familiar with the codes of the products you order frequently, or are perhaps entering details on behalf of someone else from a list he or she has supplied, this is probably the quickest option.

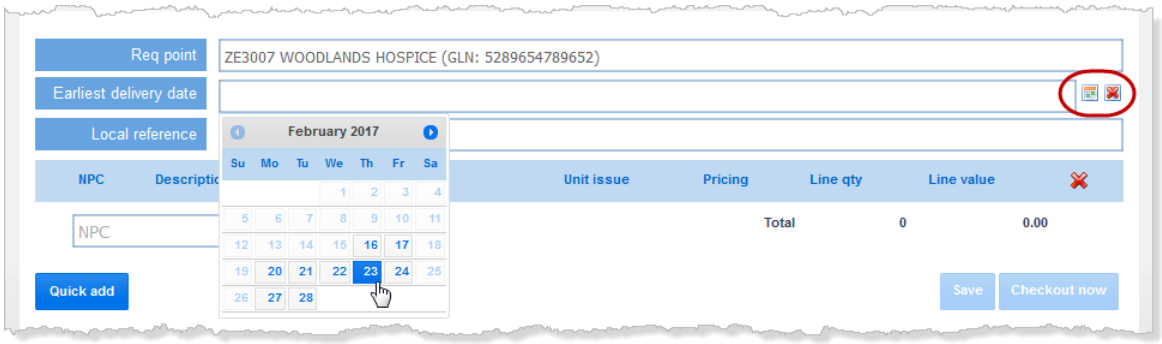
1 Select **New Order** from the options at the top of the page.



Or click the **Place an order** button in the middle of the **Home** page:

The order form opens showing your current **Req point**.

2 Optionally specify an **Earliest delivery date**. Use the calendar to do this, which is shown if you click in the date box or select the icon immediately to the right of it.



To remove a delivery date specified in error, click the icon to the right of the box.

3 Optionally give the order a **Local reference** to identify this particular order again.

4 If you add an eDirect product (indicated by the icon) to the order, an additional box is shown called **Notes**.

This **Notes** box does not appear until an eDirect item is added to the order. See ‘Sending suppliers additional information about an order or an order line’ on page 24 for a more detailed explanation.

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Sending suppliers additional information about an order or an order line

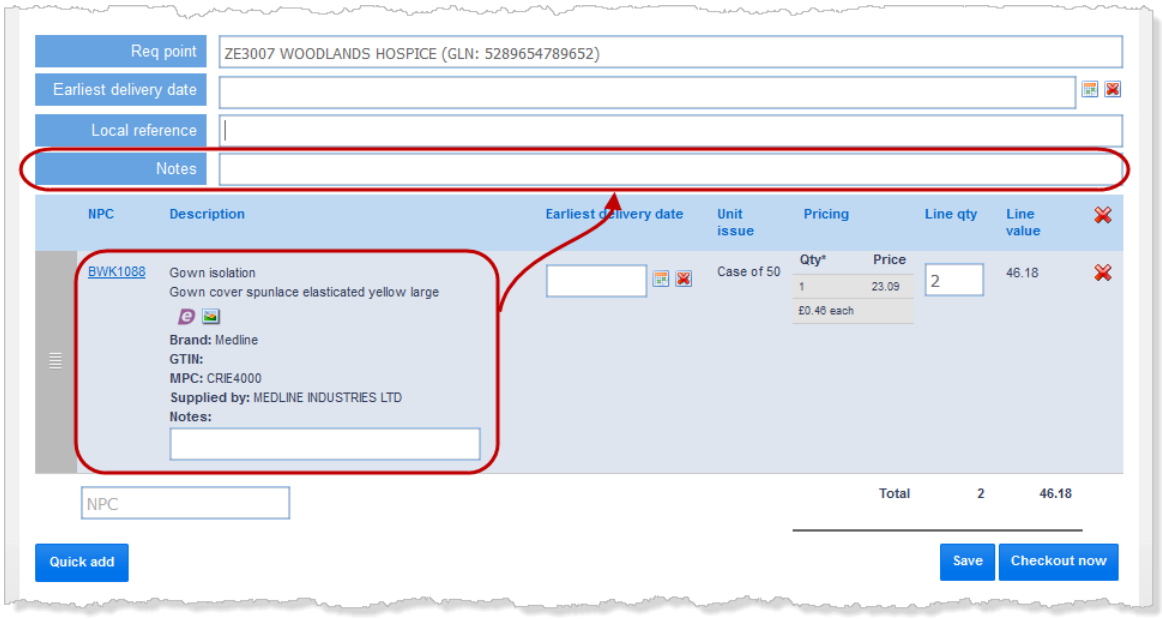
The information in **Notes** is sent to the supplier as part of the order. If an order contains multiple products from different suppliers:

- All suppliers are sent **Notes** associated with the whole order
- Only the supplier providing the product is sent **Notes** associated with an order line

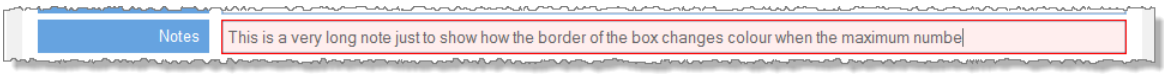
For example, you can record:

- Serial or batch numbers for products you have 'on consignment'. These products are still owned by the supplier and you are invoiced when you issue them. Suppliers may need to track the issue of consignment products and this is a way of letting them know.
- Additional information about a product – such as colour or size – when a single product code covers a number of variants.
- Information about the order as a whole – for example "Clinical trial – invoice only"

So that you do not accidentally re-use a serial number, a warning is given if text in the box is repeated. You can ignore this warning if appropriate.



You can enter a maximum of 100 characters in this box, and if you exceed this number as you are typing, the border of the box changes to red.



Add individual lines to the order

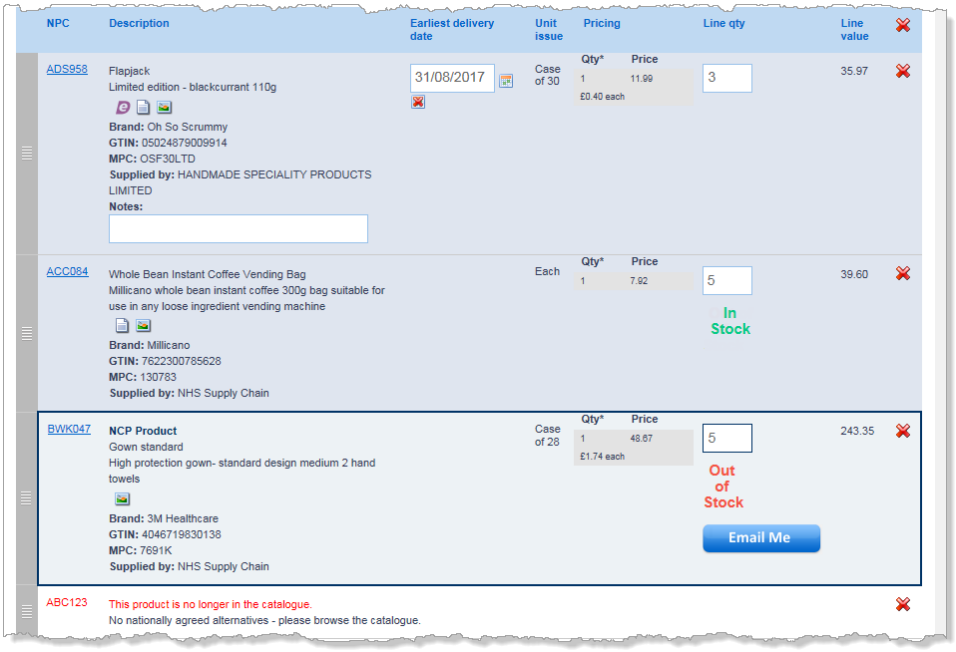
You can add products to the order one product at a time by typing the product number in the **NPC** box and pressing either the TAB key or the ENTER key.

- If the product does not currently exist, a message is displayed as shown for product code **ABC123** in the example below.

- If the product exists, a short description of it appears, including any icons that give additional information about the product.

  For example, the top line below is an eDirect product (indicated by the icon) – if you hover your mouse cursor over this icon, the lead time you need to allow is displayed. See ‘Key to icons’ on page 5 for an overview of the icons and their meanings and ‘Stock and non-stock products’ on page 8 for an explanation of the different product categories.

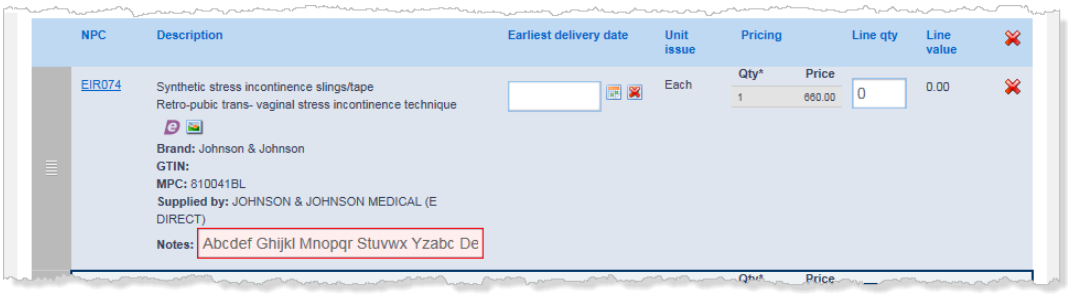
  The third product on the order is an NCP product – from the Nationally Contracted Product list – indicated by the dark blue box and text. It is also out of stock and there is an option to send an email message when it becomes available again.



If a message is displayed stating that a product is no longer in the catalogue, make sure you have typed the correct NPC code.

- If the product is an eDirect product (indicated by the icon), an additional box labelled **Notes** is displayed at the line level for that product that you can use to send additional details to the supplier (see ‘Sending suppliers additional information about an order or an order line’ on page 24).

  You can also use this box to specify any other details about the item being ordered – for example, size or colour where these options are available within the same product code.



You can type a maximum of 160 characters into the **Notes** box. The border of the box changes to red as you are typing if you exceed this number.

You must specify a quantity for an order line by typing a number into the **Line qty** box.

You can optionally specify a different **Earliest delivery date** for an eDirect product: enter it in the same way as for the whole order. The earliest delivery date set for the order applies if you leave this blank.

When you press TAB or ENTER after entering the product code, you are automatically moved to the **Line qty** box. Use your mouse to access any of the other areas.

Add multiple lines to the order

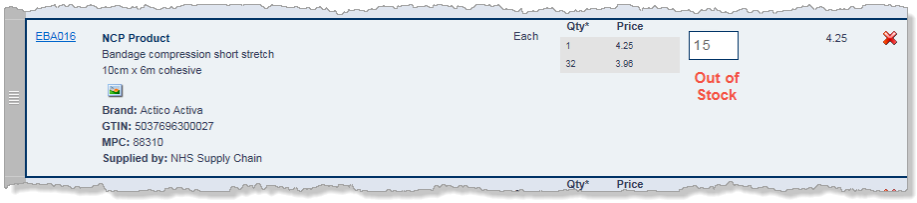
Click the **Quick add** button to add multiple items to the order, with optional quantities. Type (or paste) product codes and quantities into the box, using a space to separate them.

The example below will add two products (**AAA158** and **AAA157**), with quantities of **50**.

The example below will add three products (**AAR338**, **AAR339** and **AAR337**). The quantity of **AAR339** will be set at **20** – you will have to set quantities for the others once they have been added to the order.

Out-of-stock products

You can still add out-of-stock products to your order, but delivery may be delayed. If any items you have added are out of stock, this is clearly indicated on the order form.



If a product is marked as ‘In Stock’ but you set the order quantity to more than the number available (for example, if 10 of an item are in stock and you set the order quantity to 15), then the message changes to ‘Out of Stock’.

Stock status is calculated hourly, so actual stock levels may differ from those displayed at the time of ordering. The **Unsatisfied Lines** report (see ‘Unsatisfied lines’ on page 39) – available the day before your order is due for delivery – shows any items that were not available for your order.

Choosing alternatives

If an item you want to order is no longer available but there are suitable alternatives, these are displayed on the order form for you to select.

Delete lines from an order

To delete lines from an order, click the ✖ icon to the right of that line.

Save your order or checkout

You can save your order and complete it later, or you can proceed to checkout to submit it.

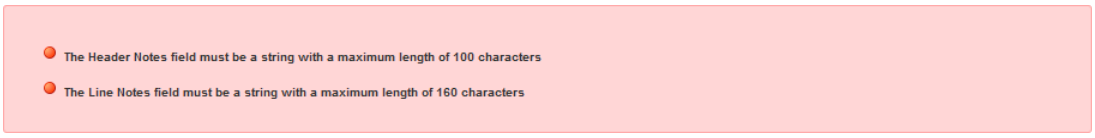
Save your order

Click **Save** to save your order in its current state – you will be able to return to it later (see ‘Re-open and change a saved order’ on page 31).

Save your order to make sure you do not lose it. If you are automatically logged out because you have not used the system for a period of time, you will lose any unsaved orders.

If you have entered too many characters in either of the **Notes** boxes, an error message is shown and you cannot save the order.

The **Notes** boxes are only available for eDirect products – see ‘Sending suppliers additional information about an order or an order line’ on page 24 for an explanation of their use.



Checkout your order

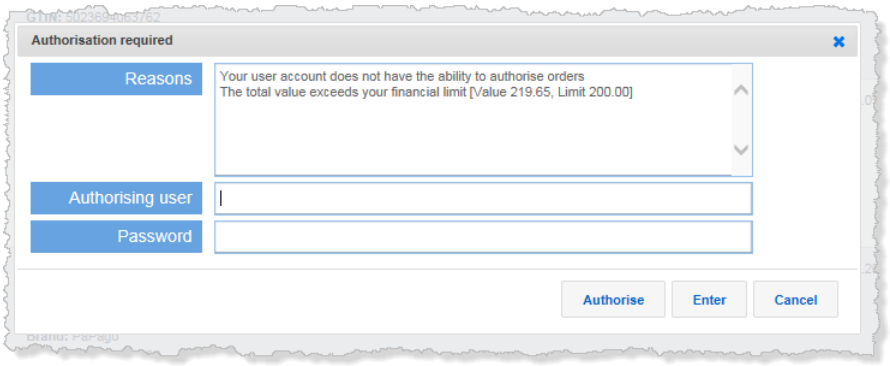
Click **Checkout now** to submit your order.

- If you have recorded **Notes** as part of the order – either at the order level or line level – and have repeated text in these fields, you are warned about the duplication.

  The NPC/MPC of the product is shown for duplicate entries at the line level (highlighted in the example above).

  You can choose to **Continue to checkout** if the duplication is irrelevant, or **Cancel** to investigate and correct the error.

- If the order is within the amount that you are permitted to authorise (and you have the *Authorise and send role*), the order is submitted immediately.
- If the order requires authorisation from someone else, the opportunity is given for that person to enter his or her username and password at that time:

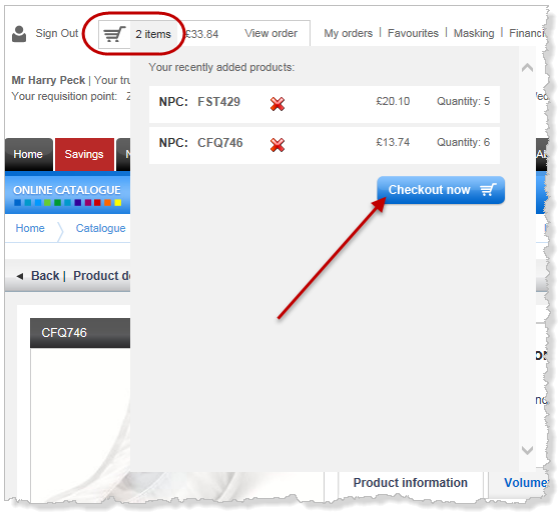


  Click **Authorise** if the required information has been entered, or click **Enter** to save the order for authorisation later (see ‘Authorising orders’ on page 34).

  You can still make changes to an order before it is authorised – see ‘View or change an order waiting for authorisation’ on page 33.

Quick checkout

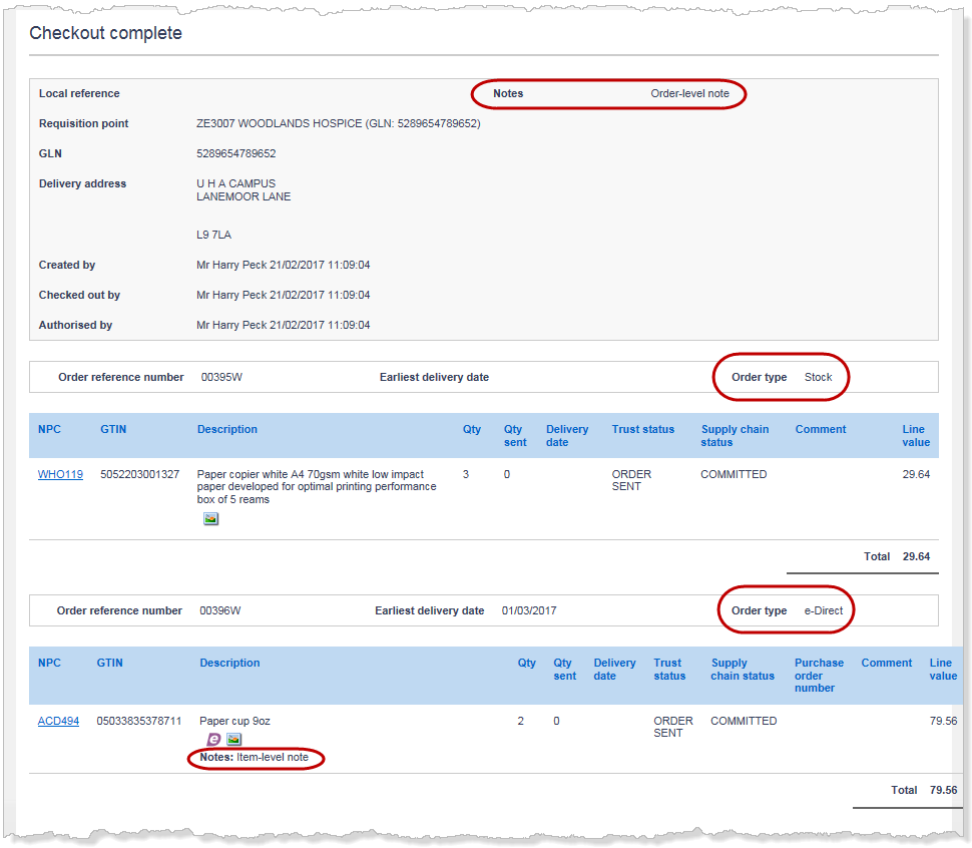
You can also checkout your order by clicking on the indication of the number of items that are in your shopping trolley. A list is displayed showing minimal information – click **Checkout now** to complete the process.



Orders containing a mixture of stock, Blue Diamond and eDirect products

When orders contain a mixture of products, the order may be split into sub-orders when checked out, one for each type.

NHS Supply Chain



Checkout complete

Local reference		Notes	Order-level note
Requisition point	ZE3007 WOODLANDS HOSPICE (GLN: 5289654789652)		
GLN	5289654789652		
Delivery address	U H A CAMPUS LANEMOOR LANE L9 7LA		
Created by	Mr Harry Peck 21/02/2017 11:09:04		
Checked out by	Mr Harry Peck 21/02/2017 11:09:04		
Authorised by	Mr Harry Peck 21/02/2017 11:09:04		

Order reference number 00395W Earliest delivery date Order type Stock

NPC	GTIN	Description	Qty	Qty sent	Delivery date	Trust status	Supply chain status	Comment	Line value
WHO119	5052203001327	Paper copier white A4 70gsm white low impact paper developed for optimal printing performance box of 5 reams	3	0		ORDER SENT	COMMITTED		29.64
								Total	29.64

Order reference number 00396W Earliest delivery date 01/03/2017 Order type e-Direct

NPC	GTIN	Description	Qty	Qty sent	Delivery date	Trust status	Supply chain status	Purchase order number	Comment	Line value
ACD494	05033835378711	Paper cup 9oz Notes: Item-level note	2	0		ORDER SENT	COMMITTED			79.56
									Total	79.56

For example, the order above was created as a single order but when it was checked out, the sub-orders were created: one for stock items and one for eDirect items. This order did not contain any Blue Diamond products.

EDirect items are always listed separately. Blue diamond items *may* be listed separately if they have a greater lead time than for stock items.

Viewing and changing an order

You can change a saved order until it is authorised and submitted. You cannot make changes after that point – you have to cancel the order by contacting Customer Services.

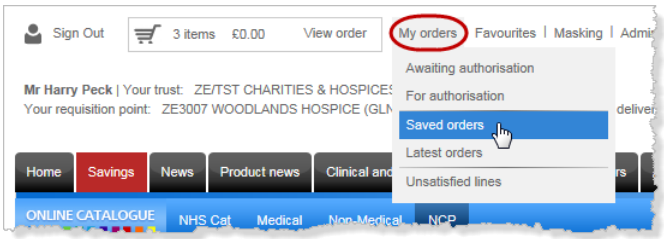
All of the orders shown using options in the **My orders** section are linked to you as the person who created the order – you can see orders for every requisition point that you can access. Information for orders older than 6 weeks ago is not shown.

Re-open and change a saved order

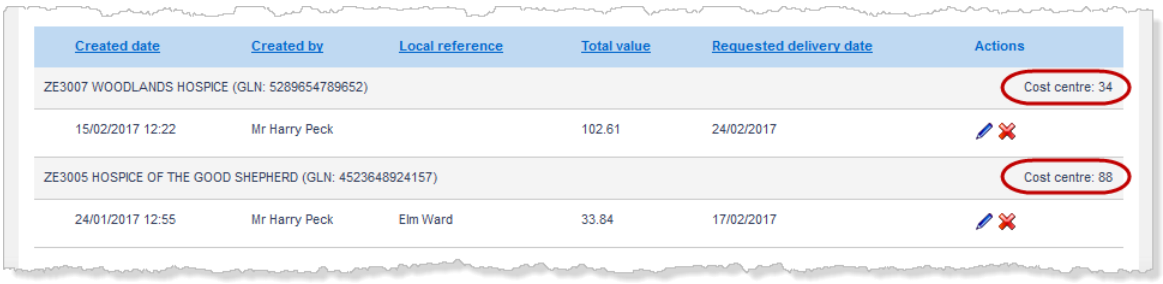
Saved orders have not yet been submitted to NHS Supply Chain, so you can make changes.

To re-open a saved order and (optionally) make changes to it:

1 Select **My orders**, and then **Saved orders** from the menu at the top of the page.



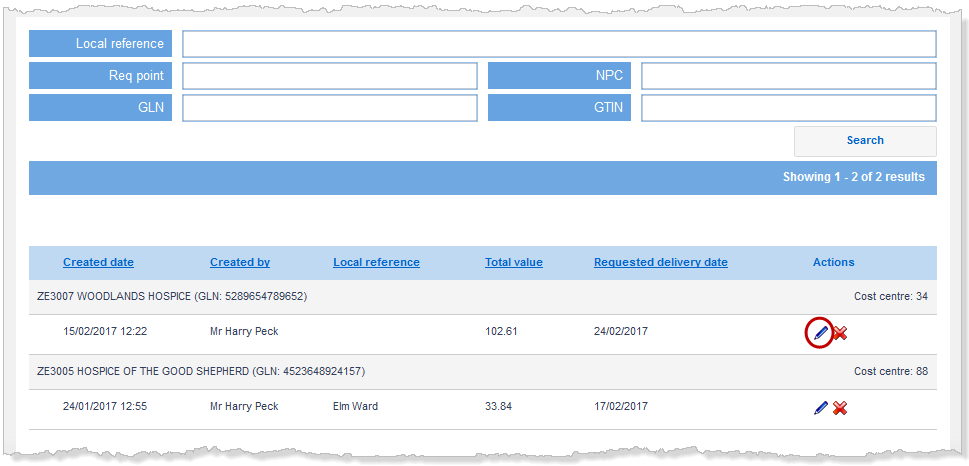
All of your saved orders (those not yet submitted or waiting for authorisation) are shown in a list, grouped by requisition point and showing the cost centre associated with it.



2 Search for a particular order by specifying one or more of the following and then clicking **Search**:

- All or part of the **Local reference**
- All or part of the **Req point** code associated with the order
- The **GLN** of the **Req point** associated with the order
- The **NPC** or **GTIN** of an item – all saved orders including that product are listed (assuming other criteria are met)

Orders that match all of the specified criteria are displayed.



3 Click the pencil in the **Actions** column.

The order opens in the same order page as used to create it originally. Make any required changes, including changing delivery dates, quantities or removing lines from the order.

If your order contains eDirect products, you can edit the **Notes** associated with the order as a whole or any information held in the line-level **Notes** field.

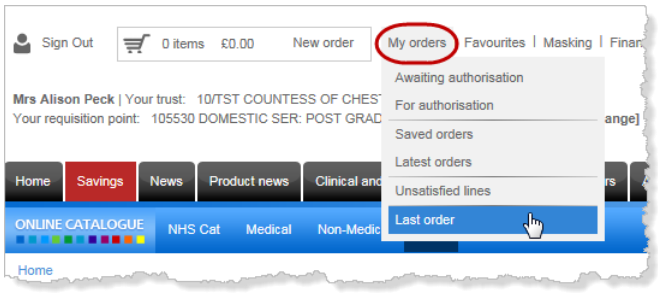
If you remove the only line containing eDirect products from the order, both the line-level and the order-level **Notes** fields are removed. If you intend to replace the eDirect product with another, find the replace and add it first to keep the order-level **Notes**.

4 You can search the catalogue to find products to add to the order. When you have found the product you want, specify the quantity and click **Add to order** to add this product to the order you are editing.

Do not click the **Add** button – this adds the product to your basket, which starts a new order.

5 To view the order you are editing, select **Last order** from the **My orders** menu. This option is only present when you are editing an existing order.

Do not select the **View order** option – this displays the contents of your basket (an unsaved order).

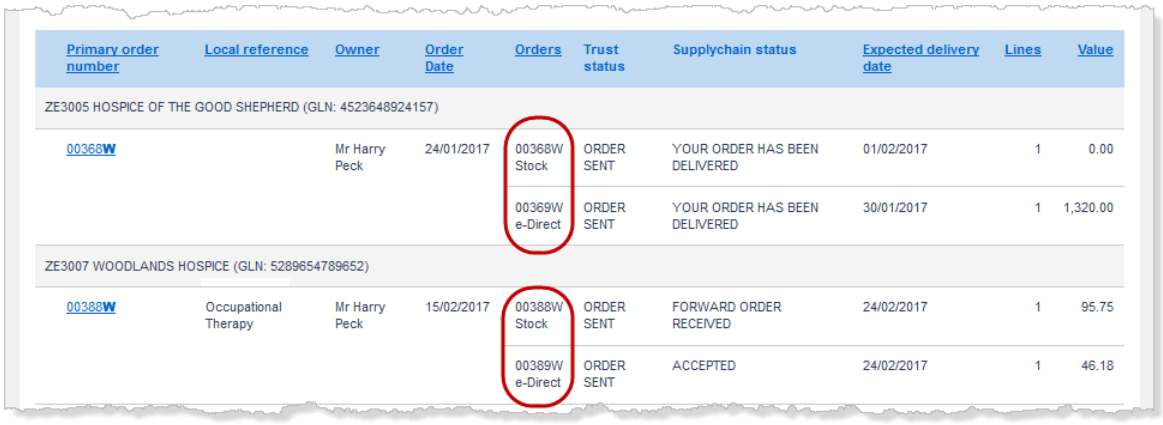


6 Save the order again or click **Checkout**.

See 'Checkout your order' on page 28 for further information.

Orders containing a mixture of stock, Blue Diamond and eDirect products

The sub-orders for each of the different order types are shown in the order list, and the categories are also separated when viewing order details.



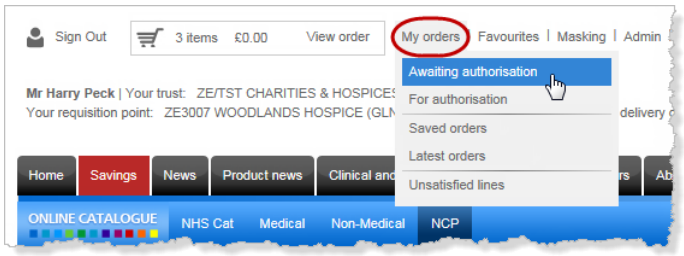
Primary order number	Local reference	Owner	Order Date	Orders	Trust status	Supplychain status	Expected delivery date	Lines	Value
ZE3005 HOSPICE OF THE GOOD SHEPHERD (GLN: 4523648924157)									
00368W		Mr Harry Peck	24/01/2017	00368W Stock	ORDER SENT	YOUR ORDER HAS BEEN DELIVERED	01/02/2017	1	0.00
				00369W e-Direct	ORDER SENT	YOUR ORDER HAS BEEN DELIVERED	30/01/2017	1	1,320.00
ZE3007 WOODLANDS HOSPICE (GLN: 5289654789652)									
00388W	Occupational Therapy	Mr Harry Peck	15/02/2017	00388W Stock	ORDER SENT	FORWARD ORDER RECEIVED	24/02/2017	1	95.75
				00389W e-Direct	ORDER SENT	ACCEPTED	24/02/2017	1	46.18

View or change an order waiting for authorisation

Orders awaiting authorisation have not yet been sent to NHS Supply Chain. You can make changes.

To re-open an order awaiting authorisation and (optionally) make changes to it:

1 Select **My orders**, and then **Awaiting authorisation** from the menu at the top of the page.



2 Select the order from the list of orders shown and edit it as described in 'Re-open and change a saved order', above.

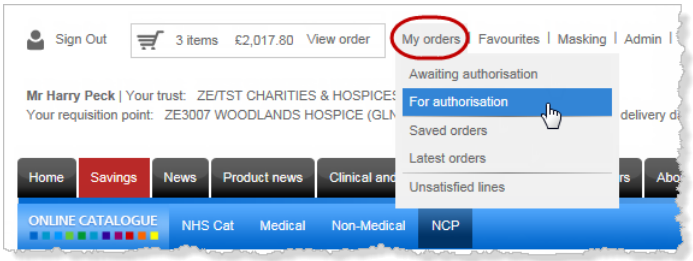
Authorising orders

You must have the *Authorise and send* role (see 'Roles' on page 55) to authorise orders. You can authorise orders up to your financial limit. You will only receive an email telling you that orders are waiting to be authorised if you have the *Authorisation email recipient* role.

Orders are not sent to NHS Supply Chain until they are authorised. If you have the *Authorise and send* role, you authorise your own orders (up to your financial limit) as you create them.

Orders associated with every requisition point that you can access are listed here, not just those for the requisition point you chose when you logged in to NHS Supply Chain.

1 Select **My orders**, and then **For authorisation** from the menu at the top of the page.

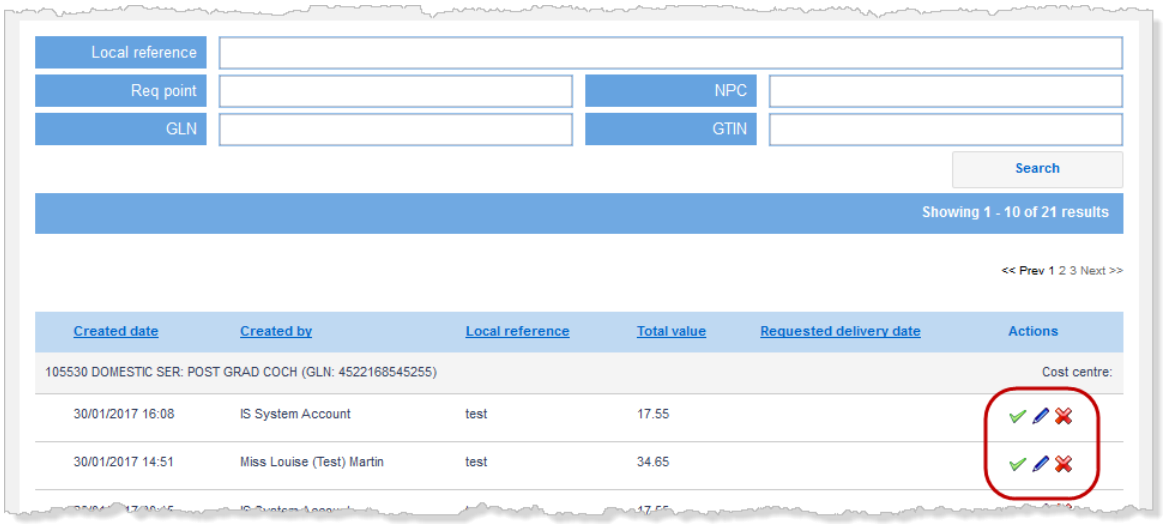


A list of orders awaiting authorisation is shown.

2 Search for a particular order by specifying one or more of the following and then clicking **Search**:

- All or part of the **Local reference**
- All or part of the **Req point** code associated with the order
- The **GLN** of the **Req point** associated with the order
- The **NPC** or **GTIN** of an item – all saved orders including that product are listed (assuming other criteria are met)

Orders that match all of the specified criteria are displayed.



3 When you have found the order you are looking for, you can:

- Authorise an order without checking any more details by clicking the green tick ✔ in the **Actions** column.
- View details of the order or edit it by clicking the pencil in the **Actions** column.
- Delete the order by clicking the cross ✖ in the **Actions** column.

Deleting an order is irreversible.

4 Review the order, make necessary changes – adding products, changing quantities or deleting (denying) lines – and then click **Checkout now**.

Authorising standing orders

Standing orders are authorised in a different way, from the **Favourites** menu. See 'Authorising a standing order' on page 47 for details.

Denying authorisation

To deny authorisation for a line within an order, click the delete icon ✖ to the right of that line. When the person who created the order views it in **Latest orders**, the status for that line is shown as **DENIED** (see 'Order status' on page 38 for more information).

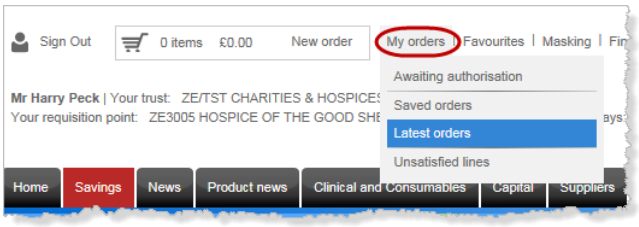
If you choose not to authorise an entire order for some reason, click the delete icon ✖ to the right of that order. An email about the denial is sent to the person who created the order.

Tracking an order

The progress of your orders can be tracked from the time it is submitted until your goods arrive.

Detailed tracking information may be available for eDirect orders if this has been provided by the supplier – see 'Tracking information for eDirect orders' on page 39.

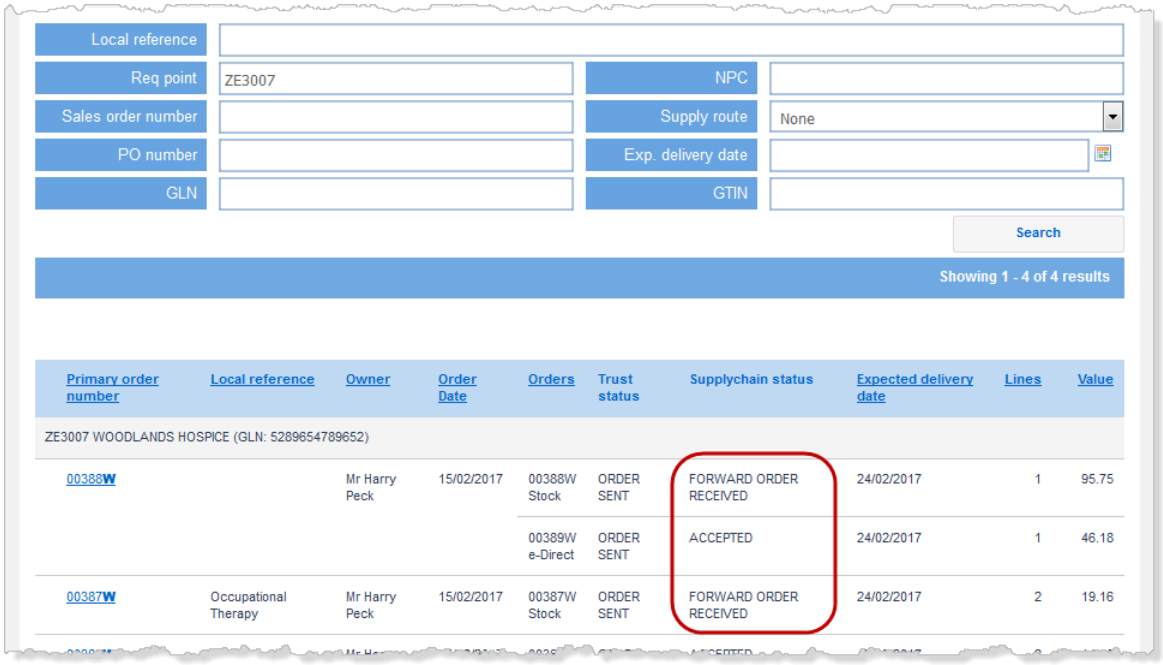
Once orders have been authorised and submitted to NHS Supply Chain, they can be seen in your list of latest orders:



Orders are included in this list if they were authorised and sent within the last three weeks. Orders that were sent longer ago are included if they have not yet been shipped. They are listed in reverse chronological order with the most recently authorised order at the top of the list. Recently created orders may be further down the list than you expect if they were saved for some time before being authorised and sent.

If orders are deleted before they are authorised, they are removed from the system and are not shown on this list at all.

Select **My orders** and then **Latest orders** from the menu to see orders that you have previously created. The search options at the top of the list enable you to find a particular order easily.



Find an order by specifying all or part of one or more of the following and then clicking **Search**:

- The **Local reference**
- The **Req point** code associated with the order
- The **Sales order number** – orders with a **Primary order number** that match are included
- The **PO number** - visible when viewing an order: all orders with a matching **Purchase order number** are included
- The **GLN** of the **Req point** associated with the order
- The **NPC** of an item – all orders including that product are included
- The **Supply route** – selecting from **None** (which means none selected), **Stock**, **eDirect** and **External**
- The **Exp. Delivery** date – all orders that contain sub-orders with that delivery date are included
- The **GTIN** of an item – all orders including that product are included

Orders that match *all* of the specified criteria are displayed.

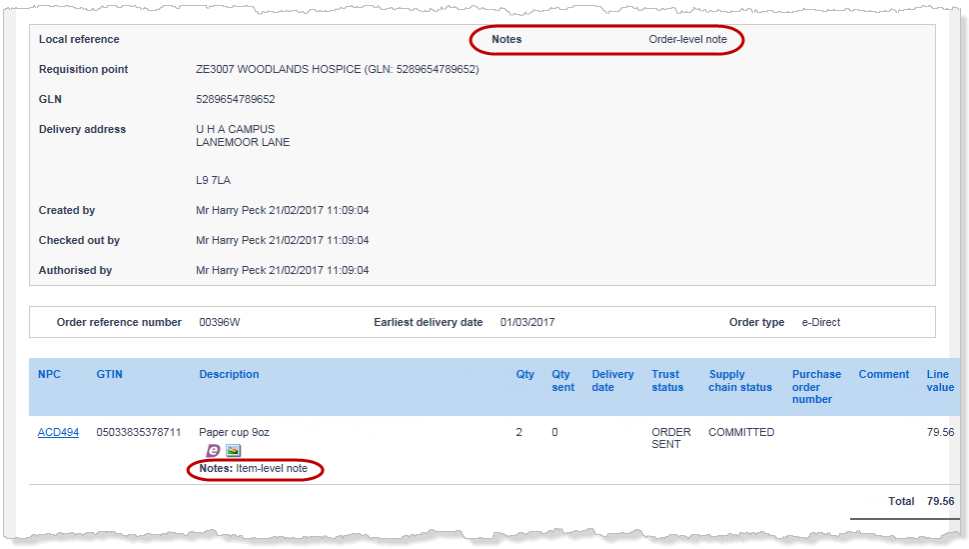
Sort the list by clicking any of the underlined column headings. Click the same heading again to reverse the sort order.

The suffix of the **Primary order number** (final letter) indicates the order type or how it was placed:

C	Blue Diamond order reDirected
M	orders placed using e-DC
U	orders entered by Customer Services
W	orders placed manually using the online ordering system
X	order placed using EDI
Y	residual stock

Details of an order

To see details of an order, click the **Primary order number**. Information is updated as the order is progressed through the system. For example, when the order is delivered, the quantity sent (**Qty sent**), the delivery date (**Del date**) and the **Supply chain status** are all updated. If your order contains eDirect products, any order-level and line-level notes are shown (highlighted below).



Local reference		Notes	Order-level note
Requisition point	ZE3007 WOODLANDS HOSPICE (GLN: 5289654789652)		
GLN	5289654789652		
Delivery address	U H A CAMPUS LANEMOOR LANE L9 7LA		
Created by	Mr Harry Peck 21/02/2017 11:09:04		
Checked out by	Mr Harry Peck 21/02/2017 11:09:04		
Authorised by	Mr Harry Peck 21/02/2017 11:09:04		

Order reference number	00396W	Earliest delivery date	01/03/2017	Order type	e-Direct

NPC	GTIN	Description	Qty	Qty sent	Delivery date	Trust status	Supply chain status	Purchase order number	Comment	Line value
ACD494	05033835378711	Paper cup 9oz Notes: Item-level note	2	0		ORDER SENT	COMMITTED			79.56
									Total	79.56

Order status

The **Trust status** refers to processing of the order done locally before it was submitted to the NHS Supply Chain. The only possible entry here is **ORDER SENT**, which means that the order has been successfully submitted to NHS Supply Chain.

The **Supplychain status** shows progress of the order through the NHS Supply Chain systems. The possible entries here are:

- **COMMITTED**: the order has been received but processing has not yet started.
- **ACCEPTED**: your order has been accepted and work has begun.
- **WE ARE PACKING YOUR ORDER**
- **PACKED AND LOADED ONTO LORRY**: on the lorry, awaiting delivery paperwork.
- **READY FOR DELIVERY**: on its way.
- **YOUR ORDER HAS BEEN DELIVERED**
- **BLUE DIAMOND – WILL FOLLOW SOON**: Blue Diamond items are those that are delivered by NHS Supply Chain but are not stocked at the distribution centre. They have different lead times to stocked items: the usual lead time is 2 days. The expected date of delivery is shown in the **Comment** column.
- **TEMPORARILY OUT OF STOCK** – shown against an individual line item when stocks are not available at the distribution centre. Depending on the requirements of your trust, these items may automatically be sent when stock is available or may need to be re-ordered.
- **SUPPLIER OUT OF STOCK** – shown against an individual line when the supplier is out of stock of a Blue Diamond product.
- **INCOMPLETE** – an order line has not been accepted by NHS Supply Chain for one of the following reasons, specified in the **Comment** column:
  - **Invalid GL code** – no financial code has been set up for this product line.

- **InactNSVSTC** – an inactive product code has been requested.

- **FORWARD ORDER RECEIVED** – shown if the earliest delivery date is more than 8 days in the future. Processing is suspended until nearer the delivery date, when it will be automatically processed.

You may see three other statuses – **FINANCIALLY CODED**, **PROCESSED** and **SUBMITTED**. These are shown before the track and trace process has run, so before any other status is known.

Comments shown against orders and order lines

As well as the uses described above, the **Comment** column is used to provide other information about your order. For example: **AWSL – See 06294W/14** means that the item is available while stocks last (AWSL) and that an extra line has been added to the order (at line 14) either for a designated alternative or for the outstanding quantity.

Tracking information for eDirect orders

If an eDirect order is being delivered by a courier and tracking information is available, a link is shown below the order reference number and above the order details in the list of orders.

Click the link to go to the courier's website and see tracking details.

If you have recorded a batch or serial number for the order or for selected products, these are displayed as shown above.

Unsatisfied lines

The **Unsatisfied lines** report is available from the **My Orders** menu.

1. Select the relevant **Warehouse** and **Trust**, if not already selected for you.
2. In **Select date**, select the date that you are interested in from the list available.
3. Click **Search**.

Any unsatisfied lines are listed:

- To see the order containing them, click the order number.
- To see details of the product, click the NPC.
- To export the unsatisfied lines to a spreadsheet, click **Export** and then choose whether to save or open the file.

Automatically generating an order for unsatisfied lines

To automatically generate another order for the unsatisfied items:

1. In the **Actioned by** column, select the items you still require .
2. Click **Process**.

An order is automatically generated, and the **Unsatisfied lines** report is updated to show who has processed this and when it was done.

It is only possible to generate an order for the unsatisfied lines on the day you are notified of them. From then on, the option is disabled and a new order must be created.

Using a recent order as a template for a favourite

From here, you can create a new order based on this existing one, or you can create a favourite order if this order is one you will want to repeat.

If your order contained eDirect stock, both the order-level and line-level **Notes** fields are present but contain no information.

- **Create new order from this order** copies all the details from this order with the exception of the earliest delivery date. You can then set an earliest delivery date, change any quantities, delete lines or add more lines as described in ‘Completing the online order form’ on page 22. This enables you to create ad hoc orders based on favourites.
- **Create favourite from this order** copies the contents of this order (the products and quantities) into a **Favourites** order. You only need to give it a name and save it.

For more information on creating and using favourites, see ‘Favourites and standing orders’ on page 41.

Creating an order or a favourite from any order creates it for the requisition point you selected when you logged on to NHS Supply Chain.

Exporting details of an order

You can export details of the order to:

- A PDF file

  Click the **Print** button then select whether to save or open the PDF file that is generated.
- An Excel spreadsheet

  Click the **Export** button to generate an Excel spreadsheet containing details of the order.

Favourites and standing orders

If you have the *Favourite only ordering* role, you can only create orders based on an existing favourite.

Creating favourites or standing orders can significantly speed up the order process.

- A favourite is a list of items that you order repeatedly.

  A favourite can be used to create an order, acting as a template, but is not an order itself. A favourite contains details of products and the quantities of each product that you have specified.

  You must manually create an order from a favourite, when you can amend quantities and specify other order information (see 'Creating an order from a favourite' on page 45).

- Standing orders are also groups of regularly ordered items, but in this case they do form actual orders.

  Options selected when the standing order is created determine how frequently the order is repeated. Depending on both selections made when creating the order and the authorisation level of the person creating it, a standing order may be generated and saved for further processing, may be sent for authorisation or may be submitted to NHS Supply Chain.

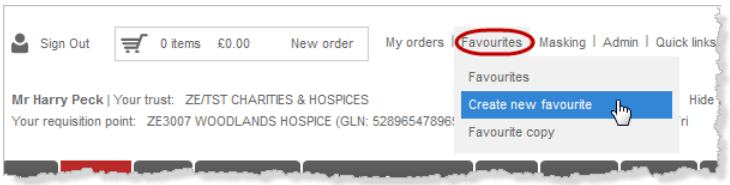
Although favourites and standing orders work differently, you can convert one to the other very easily using an option on the **Favourites** page.

Favourites

You can create and modify favourites, copy them (including all the items they contain) to other requisition points and use them as the basis for an order.

Creating favourites

- From an order in your **Latest orders** list (see 'Using a recent order as a template' on page 39). The **Favourites** page is opened containing details of the order you are using as a basis – you just need to give it a name and save it.
- By selecting the **Favourites** menu and then the **Create new favourite** option.



To create a favourite:

1. Give the favourite a name so you can easily identify it later.

2 Add products to the favourite in exactly the same way as you would create an order. You can, if you wish, leave the quantities at **0** – you can amend these when you create an order from the favourite.

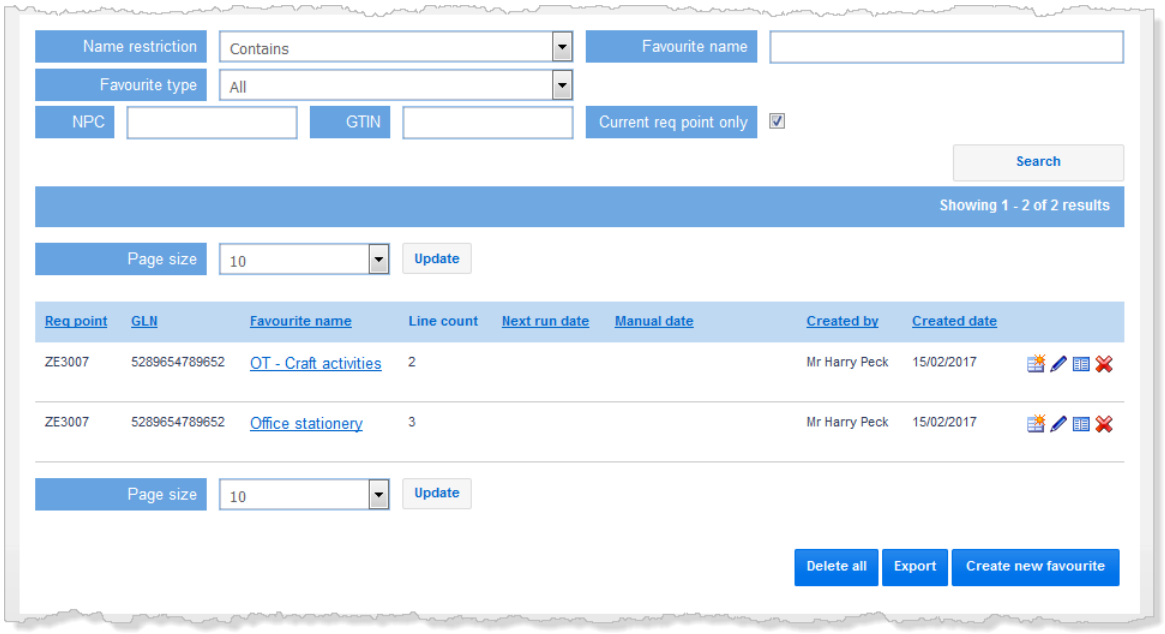
3 Save your favourite.

You can also create a new favourite by clicking the **Create new favourite** button when viewing the list of existing favourites – see 'Changing favourites', below.

Changing favourites

Search for a favourite by typing part of its name in the **Favourite name** box, and then reduce the list of potential matches by selecting **Favourites** from the options in **Favourite type**.

Select the **Favourites** menu and then the **Favourites** option. Any favourites you have already defined are listed.



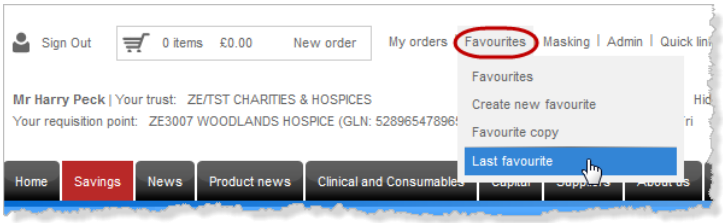
To find a particular favourite, use the search options at the top of the page. You can search using all or part of the name of the favourite, choose to include only favourites or only standing orders (by selecting an option in **Favourite type**), or search for lists containing specific products (by **NPC** or **GTIN**).The final option enables you to restrict your search to favourites and standing orders associated with your current requisition point.

You can change the contents of a favourite at any time – click its name or click the pencil image to open the same form that was used to create it originally. Make any required changes and save them.

If you search the catalogue to find products to add to your favourite, click the **Add to favourite** link when you find them.

Do not click the **Add** button – this adds the product to your basket and not to the favourite.

To return to the favourite you were editing – to review and save it – select **Last favourite** from the **Favourites** menu. This option is only present when you are editing a favourite.

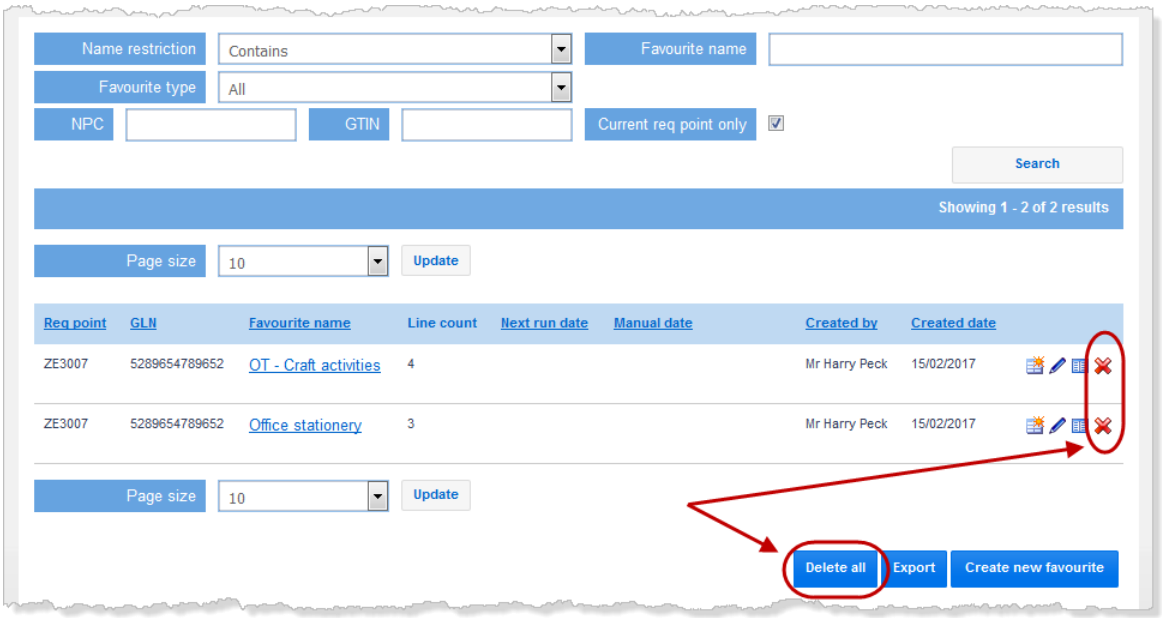


Generating a report of a favourite

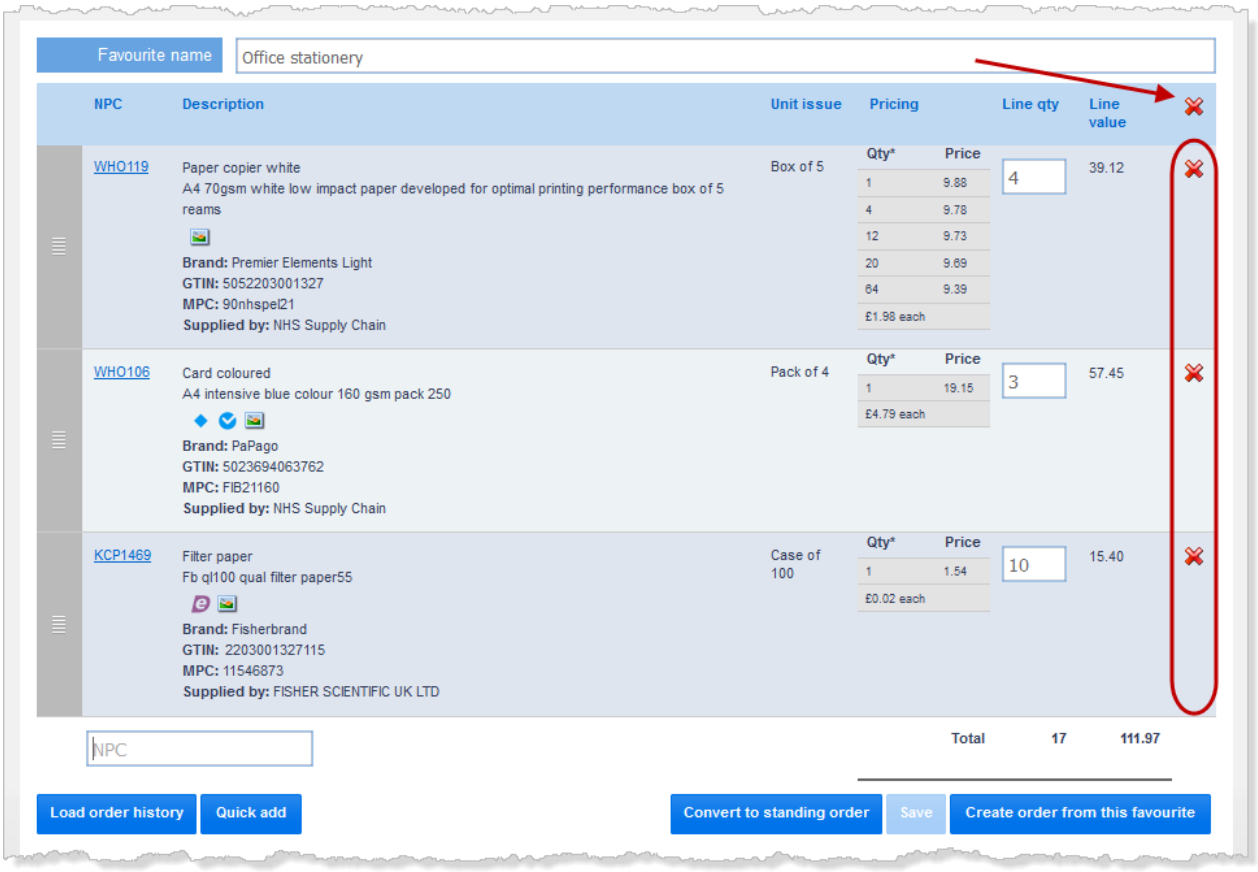
Between the pencil and the red cross is an image that creates a PDF containing information about the products that make up the favourite.

Deleting favourites

You can delete individual favourites by clicking the red cross to their right or you can delete every favourite associated with a requisition point by clicking **Delete all** at the bottom of the page.



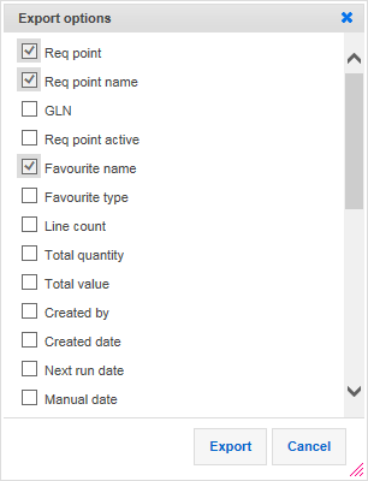
If you want to delete specific items from a favourite, open the favourite to edit it, and then use the red cross to the right of an item to delete it. To delete all items from a favourite, click the red cross in the column heading row (see arrow in image below).



Exporting favourites

You can export your favourites and standing orders as a file that can be opened by Microsoft Excel.

1. Click **Export** at the bottom of the page.
2. Select the information that you want to include in the report from the list displayed, then click **Export**.



You may be asked to choose whether you want to open or save the file. Where this is shown depends on the web browser you are using.

Creating an order from a favourite

When you have found the list you want, click **Create order** to the right of the row. Your favourite is shown – all products and quantities are shown as saved in the favourite.

Click **Create order from this favourite**. You can now change the quantities, and add or delete products as for any other order. If your order contains eDirect products, **Notes** boxes are shown at the order level, and against each eDirect product. See 'Completing the online order form' on page 22 for more information.

If you change the products or quantities when creating an order (after clicking **Create order from this favourite**), the order contains the new details. The information stored in the favourite is not changed.

Standing orders

Standing orders are created using the **Favourites** page. Both favourites and standing orders contain a collection of products that are ordered together.

Orders must be created manually from a favourite but are generated automatically from a standing order. A standing order can even be authorised (either by you or someone else with the *Authorise and send role*) so that deliveries take place as scheduled without any further intervention.

A standing order takes 72 hours so if you want it to be delivered on a particular day of the week and your requisition point receives deliveries on multiple days, create the order 72 hours before the date of the first delivery.

- If you create it sooner, you may receive your order early.

- If you create it later, it will be delivered on the first available day after processing (and on that day from then on).

If you need help to ensure you meet specific delivery days, contact Customer Services.

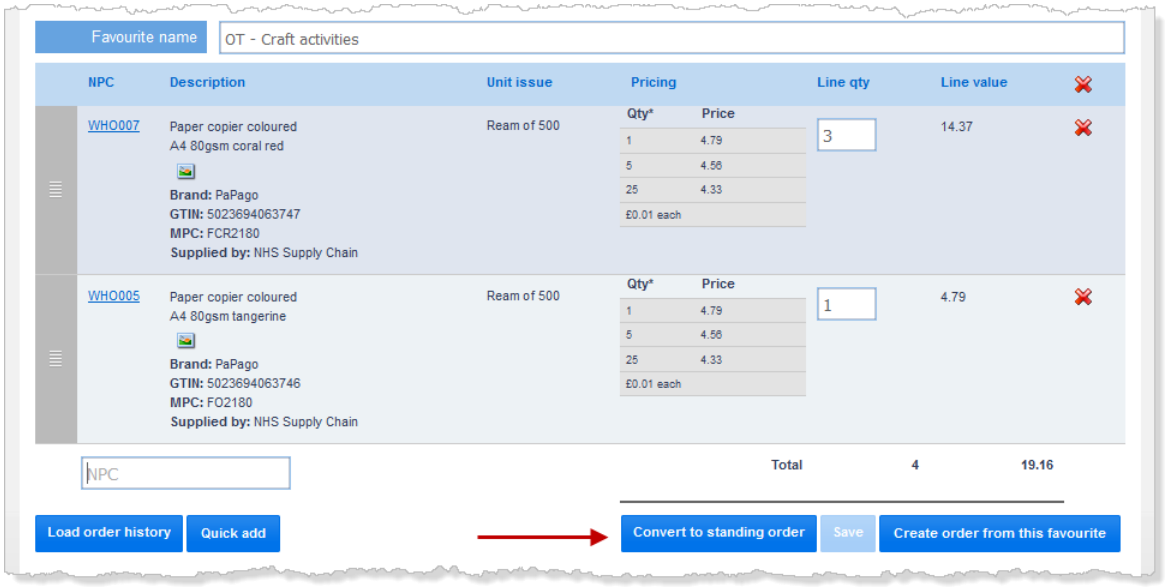
Creating a standing order

A standing order is created from a favourite.

- If you are using an existing favourite as the basis for your standing order, click its name in the list of favourites to edit it.
- If you are creating a new favourite as the basis for your standing order, follow the instructions in 'Creating favourites' on page 41 to create it.

A standing order does not contain the order-level and line-level **Notes** boxes that appear when an order contains an eDirect product.

When you can see the contents of the favourite, make any required changes and then click **Convert to standing order**.



If you are creating a new favourite, you can save it after you have converted it to a standing order.

A new set of options are displayed at the top of the page for you to provide the information required for this favourite to become a standing order.

1. If this standing order is to be submitted without further intervention, select **Auto send**.
   - An authorised order marked to be sent automatically is submitted to NHS Supply Chain when it is due.
   - An order that is not authorised but is marked to be sent automatically is generated and placed in the **For authorisation** list.

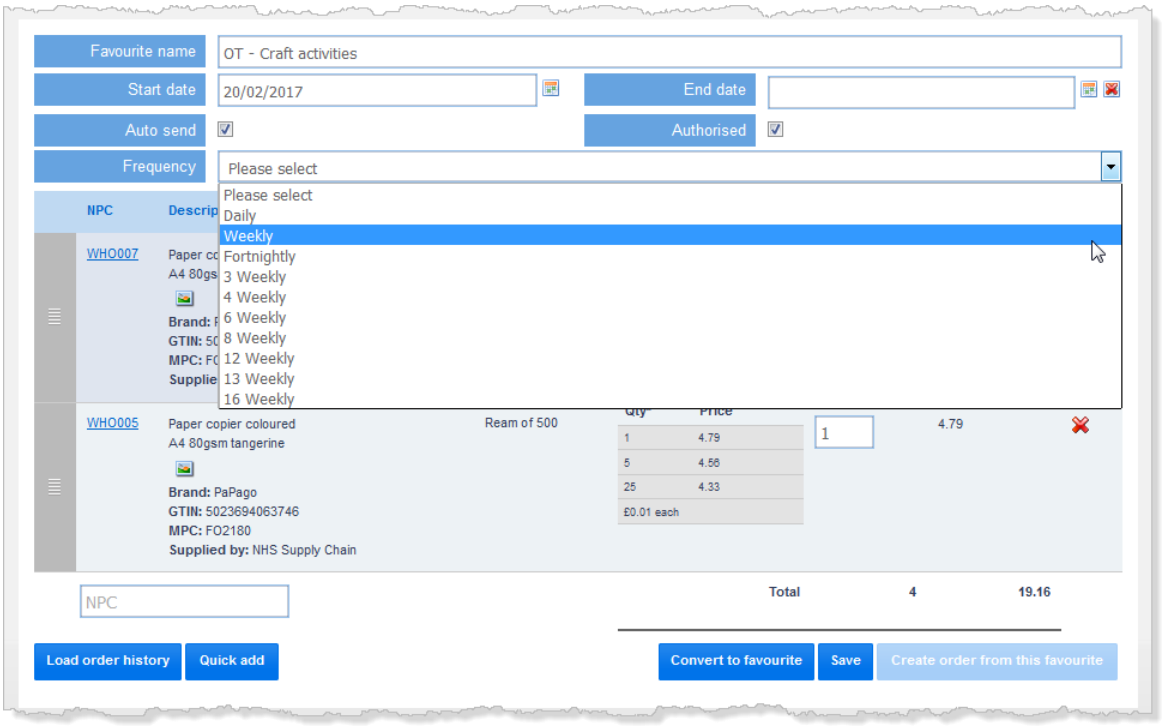
2 If you can authorise this order yourself, you can select **Authorised** – when the order is submitted it will automatically be sent to NHS Supply Chain for processing.

If you cannot authorise this order yourself, it can either be authorised by someone else as a standing order or each time the order is generated it can be authorised in the same way as other standing orders.

3 Use the calendar to specify when this order is valid from (the **Start date**). If you do not set an **End date**, it will be submitted at the required interval indefinitely.

The first delivery of this order will take place on the first available delivery date for your trust *after* the date you specify and *after* processing is complete (which takes 72 hours).

4 Choose the **Frequency** from the drop-down list.



5 Click **Save** to create the standing order.

Changing a standing order

A standing order is changed in exactly the same way as a favourite is changed – see 'Changing favourites' on page 42 for details.

Authorising a standing order

You can only authorise standing orders if you have the *Authorise and send* role. Standing orders can be authorised as they are created if the person creating them has this role.

Standing orders must be authorised before they can be processed.

1 Log on to the requisition point associated with the standing order.

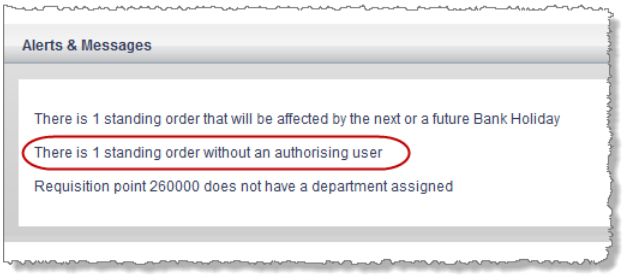
2 Select **Favourites** from the menu and find the standing order in the list.

3 Click the name of the standing order to open it.

4 Select the **Authorised** box. If you want the standing order to be submitted on the due date without any more intervention, select **Auto send**.

5 **Save** the changes.

If a standing order was authorised by someone who no longer has this role, a message is displayed on the **Home** page in the **Messages and Alerts** area.



Converting a standing order to a favourite

Open a standing order for editing and click **Convert to favourite**.

All frequency and other information that related specifically to the standing order are permanently deleted.

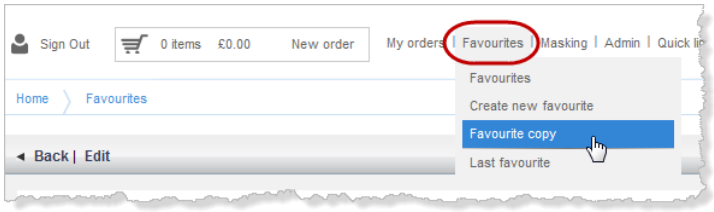
Copying favourites or standing orders to other requisition points

You can only copy favourites and standing orders to requisition points that you can access. All information stored as part of that favourite or standing order is copied, including frequency and authorisation.

If you copy a favourite or a standing order to a requisition point that already has one with that name, the existing one is overwritten. You are told that this has happened but are not warned beforehand.

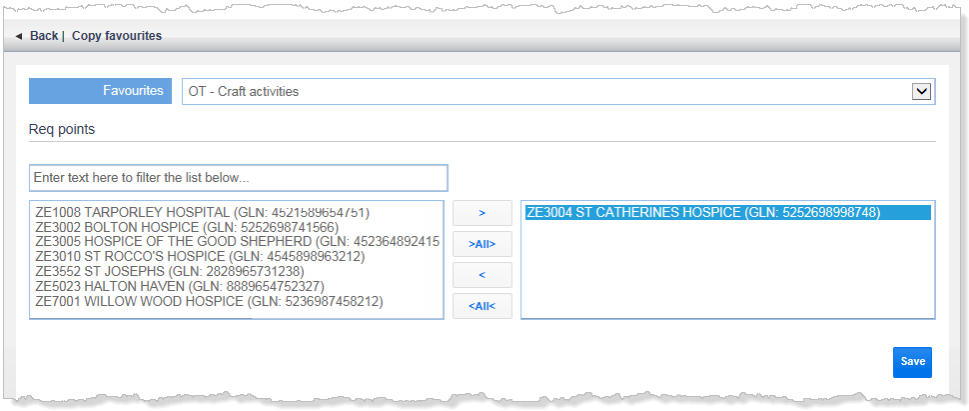
1 Log on to a requisition point that has the favourite you want to copy.

2 Select **Favourite copy** from the **Favourites** menu.



3 Select the favourite you want to copy from the drop-down list.

4 Select all the requisition points in the list on the left to which you want to copy this favourite and use the buttons to move them into the box on the right.



5 Click **Save** to save the changes.

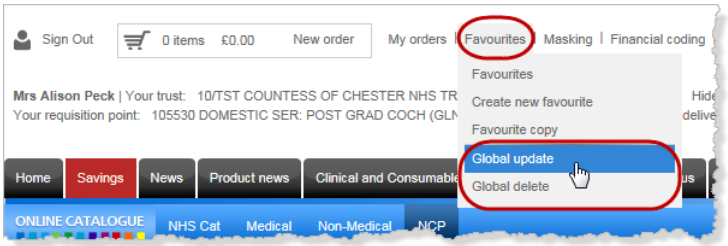
Favourites and standing orders are *copied* to requisition points. You can then make changes to any of the copies without affecting the others.

Making global changes to favourites and standing orders

You need the *Trust administrator* and *All requisition points* roles to be able to make global changes (updates or deletions) to favourites and standing orders.

Sometimes products that are included in favourites or standing orders may become obsolete. You may want to change them for an alternative or simply to delete them without having to open every favourite or standing order containing them.

You can do this using the **Global update** or the **Global delete** option on the **Favourites** menu.



Replacing a product with an alternative

1 Select the **Global update** option on the **Favourites** menu.

2 In **Existing product**, select the type of information you are going to use to find the product from the list: **All** to search all the product information or specify **MPC**, **NPC**, **Supplier**, **Brand**, **Description**, **Contract** or **GTIN** to focus the search.

3 Type the NPC, MPC, GTIN or part of the description, supplier, brand or contract of the product that you want to replace.

4 Select the correct product from the list of possible matches that is displayed after a few seconds.

Details of the product, including the pack size and GTIN (if available), are shown.

5 In **Replacement product**, search for and select the product (as in steps 2–4, above).

A list of all favourite lines that contain the source product is shown after a few seconds.

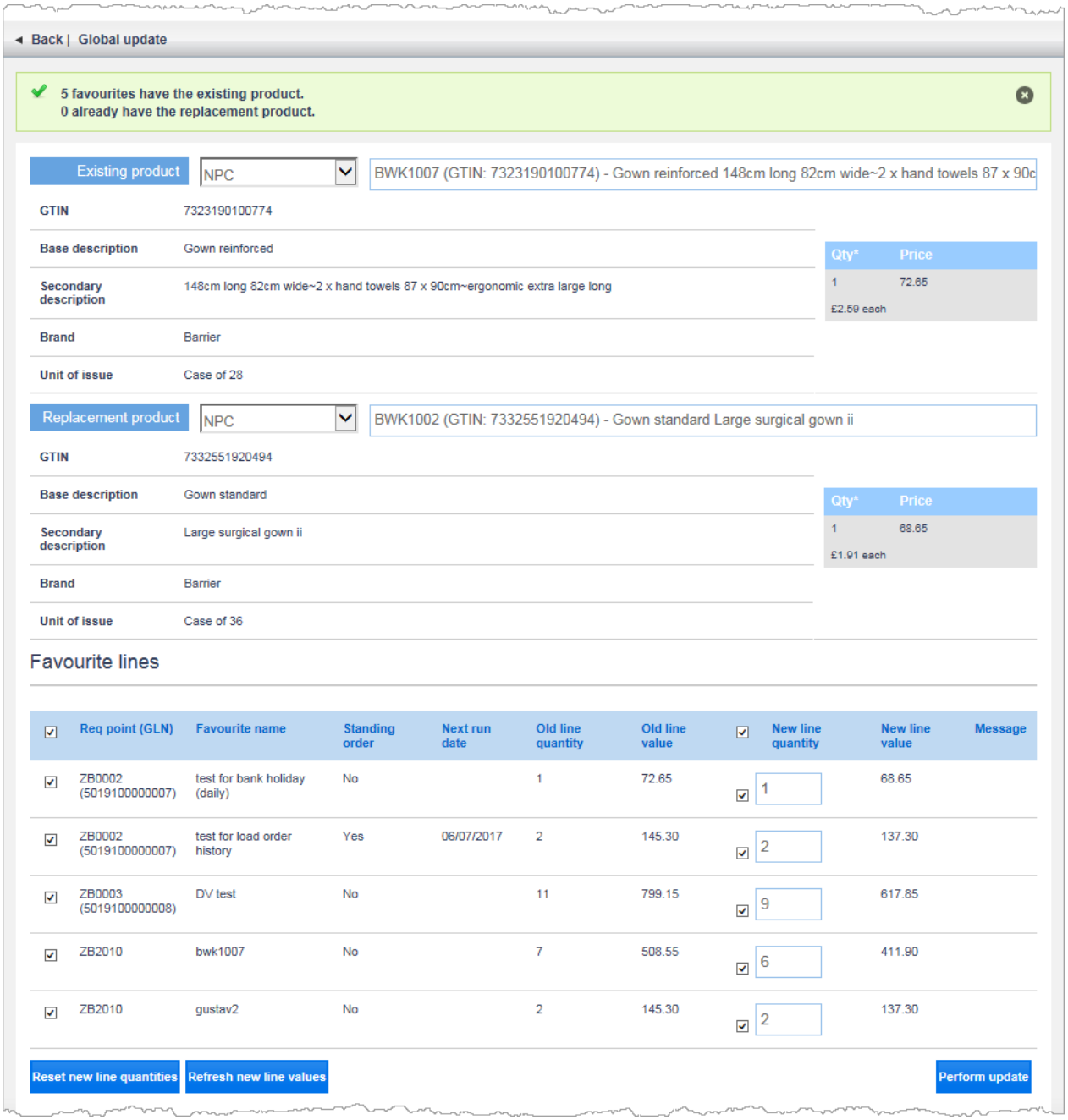
If the pack sizes of the two products are different, the line quantity is adjusted to account for the change – the **New line quantity** is set to the minimum needed to obtain *at least* the same quantity.

In the example overleaf, the original product was supplied in cases of 28 and the replacement product is in cases of 36: to get *at least* the same amount, the number of cases has been decreased in two cases.

6 If you want to change the **New line quantity** that has been automatically calculated, change it on an individual line basis.

- Click **Refresh new line values** to recalculate the cost of the replacement for any quantities you have changed.
- Click **Reset new line quantities** to return to the automatically calculated quantities.

7 All entries in favourites for the source product (the original product) are selected automatically and will be changed if you click **Perform update**. If you do not want to change an entry, click the box on the left of the row to clear it.



Removing a product from all favourites and standing orders

To delete a product from all favourites and standing orders:

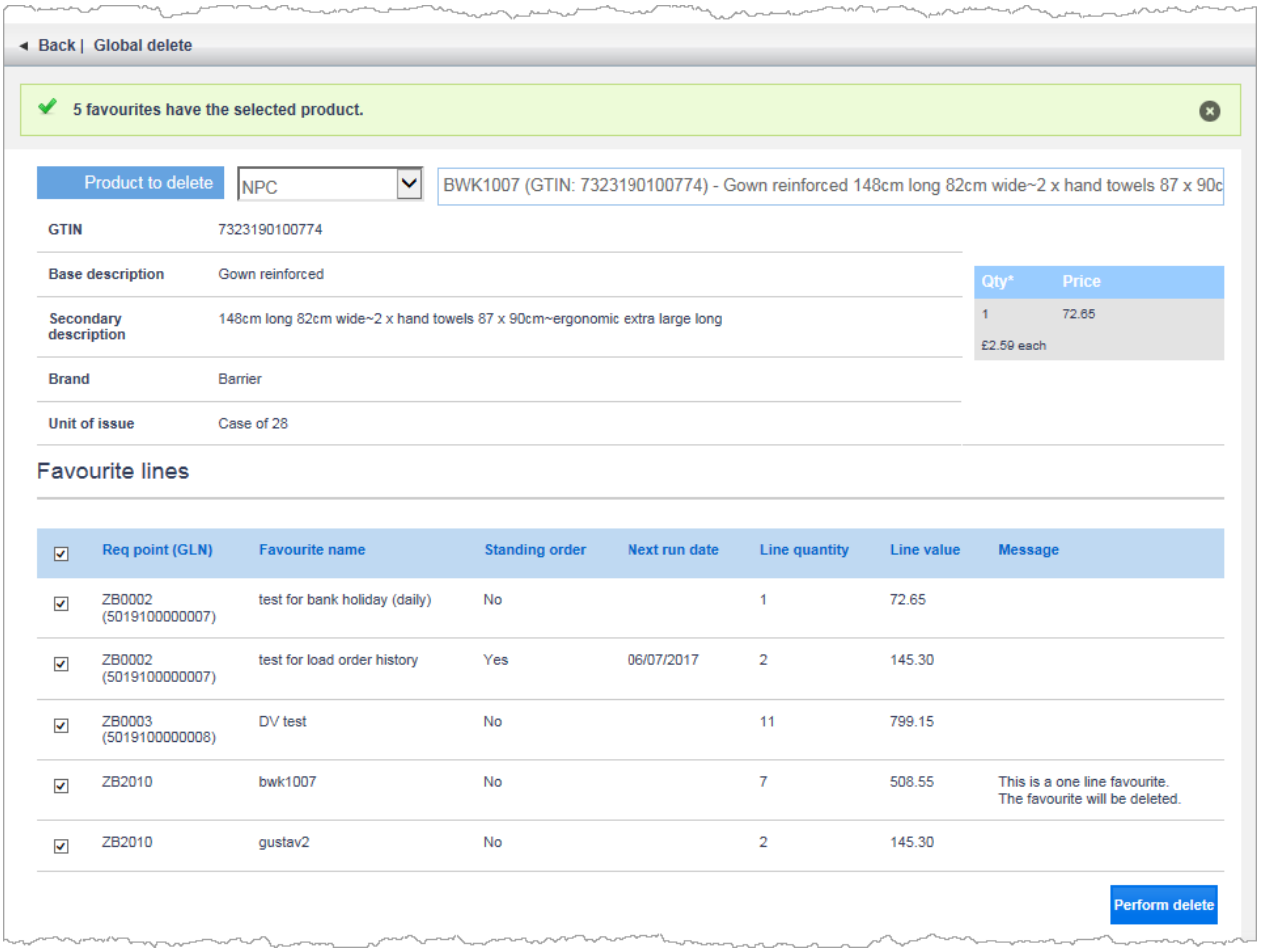
1. Select the **Global delete** option on the **Favourites** menu.
2. In **Product to delete**, find and select the product following steps 2–4 in ‘Replacing a product with an alternative’ on page 49.

   Details of the product, including the pack size and GTIN (if available), are shown.

A message at the top of the page tells you the number of favourites that will be affected if you proceed.

3 Click **Perform delete** to remove the product from the favourites.

4 Click **OK** to confirm the deletion.

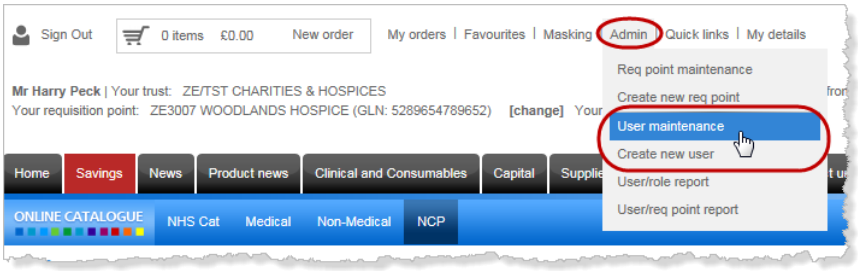


User accounts

You must have the *Trust administrator* or *User maintenance* role to be able to change other people's user accounts. If you do not have one of these roles, you cannot see this area.

You can only give people access to trusts and requisition points and assign roles that you have yourself. Unless you have the *Trust administrator* role, you cannot change your financial limit, your roles, or the trusts or requisition points associated with your account. You can change your password, email address, name and telephone number.

- Creating a user record is done from the **Create user** option on the **Admin** menu.
- Amending a user record is done using a similar set of pages: select **User maintenance** from the **Admin** menu.



The menu options you can see depend on the roles you have been assigned.

Resetting a user's password

Passwords are reset on the **User maintenance** page, accessed from the **Admin** menu.

- At the top of the page is a set of optional criteria that can be completed to create a filter to help find a particular record. See 'Finding a user account' on page 58, for more information.
- Below the set of filter criteria is a list of the users who meet the filter criteria. If you have not set any criteria, all users are shown.

  Click a column heading to sort the list by that value, and click the same column again to reverse the order. You can use the page number option on the right above and below the list to go to the next page of people.

To the right of a user's record are two icons.

User name	Full name	Email address	Telephone no	Financial limit	Last access	Date created
PECKH	Mr Harry Peck	[illegible]	01234 567890	No limit	23/01/2014	22/10/2013

- The icon on the left displays details of that user's access (trusts, roles and requisition points) and any financial limits.

The icon on the right resets the person's password.

Click the icon and a confirmation message is shown. As soon as you click **OK**, an email message is sent to that user with a new password. (The email address and telephone number in the example above have been blurred for security reasons.)

You can also reset someone's password when viewing details of that user account – there is a **Reset password** button at the bottom of the first page.

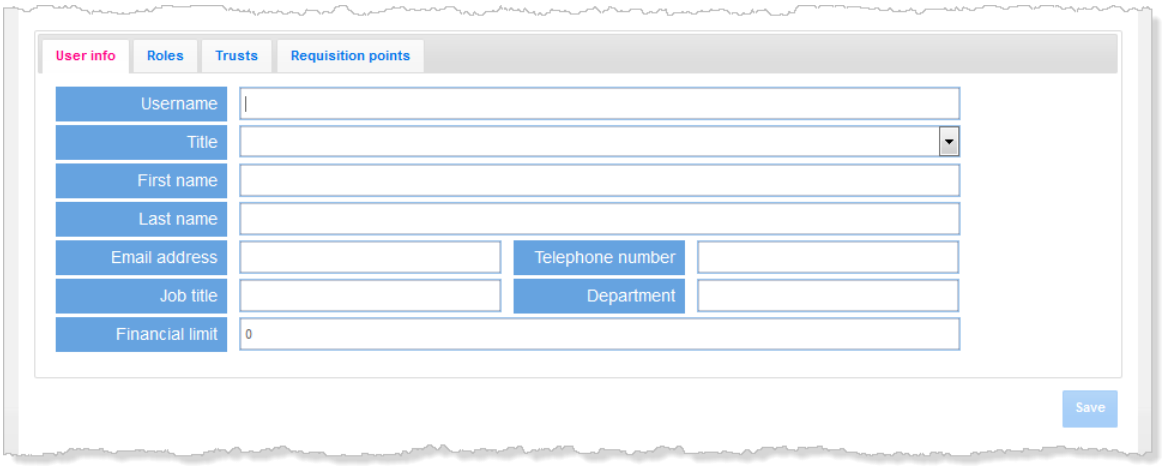
Creating a new user

To create a new user account, select **Create new user** on the **Admin** menu. An empty user record is shown, which is completed as described below.

An email containing this person's password is sent to him or her when the record is saved.

User details

Enter the personal details of the individual associated with this account on the **User info** page.



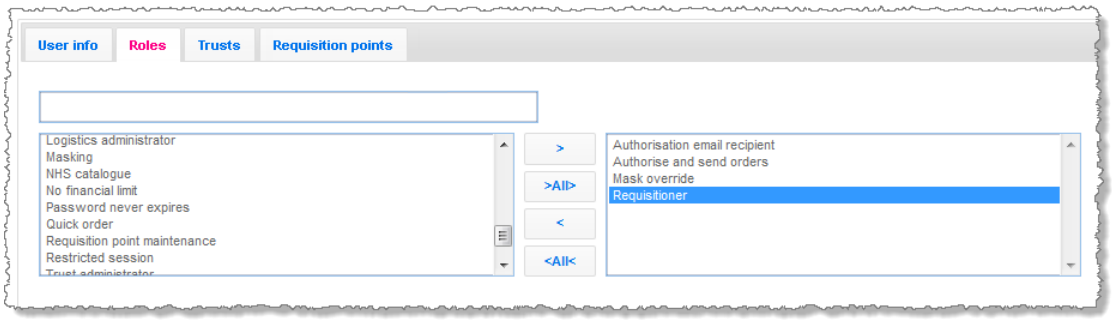
- You must specify a username. Usernames must be unique and cannot be re-used, as old ones are saved for reporting purposes.
- The **Email** address is used to send the password – please check it carefully.
- Select the person's **Title** from the drop-down list.
- Specify the user's full name, splitting it between **First name** and **Last name** (important when searching for the person later).
- In **Telephone no**, give the full phone number, including the STD code. Leave a space between the STD code and the rest of the number.
- **Job title** and **Department** are free text fields.
- Specify a **Financial limit** (in pounds) that the user can reach when authorising his or her own orders.

If you are going to give this person the 'No Financial Limit' role (see 'Roles', below) set this to **0**.

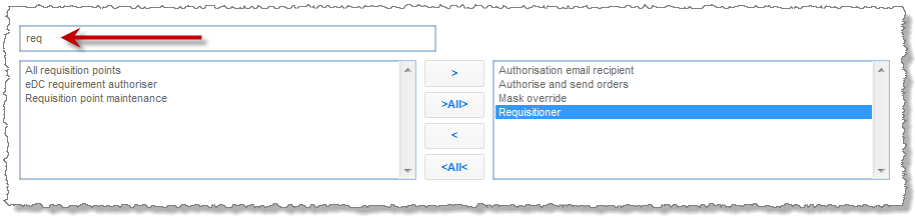
Roles

NHS Supply Chain assigns the *Trust administrator* role to an appropriate person. The trust is now responsible for allocating roles that enable people to perform their duties but not go beyond them.

Roles determine what a person can do when logged on to Online Catalogue & Ordering. Move roles between the two boxes using the arrow buttons between them (see 'Move items between one box and another' on page 8 if you need some help).



You can use the filter box to reduce the number of entries shown, which is useful when looking for an entry in a long list. In the example below, the list of available roles shows only those containing the letters 'req'.



A summary of the roles and what they enable people to do is given in Table 1.

Table 1: Summary of roles

People with this role…	can do this…
All requisition points	Access all requisition points within the trust. The records of people with this role do not need to have their details updated if new requisition points are created: they automatically get access.
Authorisation email recipient	Receive emails indicating that an order is awaiting authorisation.
Authorise and send orders	Authorise and send orders up to the financial limit set in their record. People with this role must also have the *Requisitioner* role.
eDC… (various roles)	Use the electronic demand capture (e-DC) system, which enables orders to be created from information captured using a handheld device – see separate guidance notes.

People with this role…	can do this…
Favourite only ordering	May only create orders based on existing favourites.
Financial coding	Maintain expense codes and entity/cost centres, and run reports.
Financial coding administrator	As *Financial coding*, plus creation and amendment of the trust's coding structure and defaults. This role is assigned by NHS Supply Chain.
HDS… (various roles)	Use the home delivery service (HDS) system, which enables bulky products (incontinence products) to be delivered directly to a patient's home or a care home – see separate guidance notes.
Mask override	Raise orders for items that have been masked.
Masking	Mask (prevent ordering) products from a trust or from particular requisition points within a trust.
No financial limit	Order without any financial limit.
Order acknowledgement recipient	Receive an email acknowledging receipt of an order.
Requisition point maintenance	Create, amend and deactivate requisition points – this information is automatically updated in other systems across NHS Supply Chain.
Requisitioner	Create or amend an order, but not authorise it.
Trust administrator	Modify their own user details, including roles and requisition points. This role is initially assigned by NHS Supply Chain, and has specific responsibilities (see below).
User maintenance	Create new users and modify existing user records but cannot grant roles or access to requisition points or trusts that they do not have.

What are the responsibilities of trust administrators?

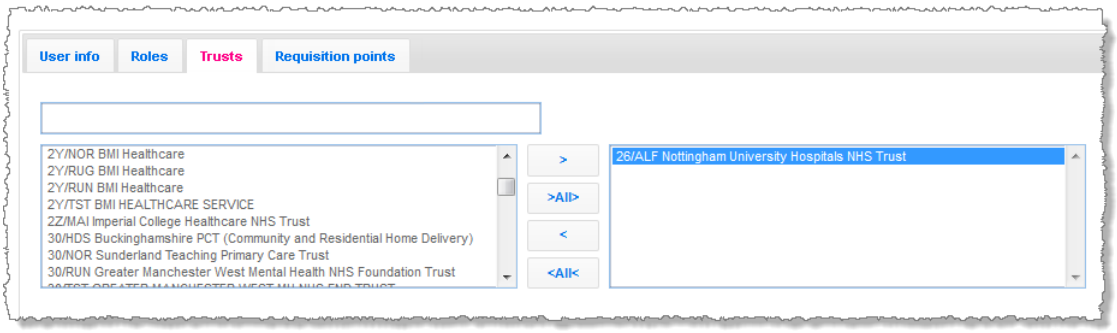
Trust administrators have overall responsibility for the use of the online ordering applications within their organisation. This includes:

- Ensuring people have the roles and access to the appropriate requisition points they need to be able to work efficiently.
- Proactively amending and deleting user accounts as people's jobs change or they cease employment with the trust to ensure only authorised individuals can order products.
- Maintaining a register of users within their trust.
- Acting as the main point of contact for communication of IT issues and initiatives from NHS Supply Chain.
- Informing NHS Supply Chain if their own roles within the trust change, or they cease employment.
- Controlling the masking of products in the catalogue.

The tasks may be delegated to others, but responsibility remains with trust administrators.

Trusts

Select the trusts that this person can access. You will only be able to allocate those that you can access yourself.

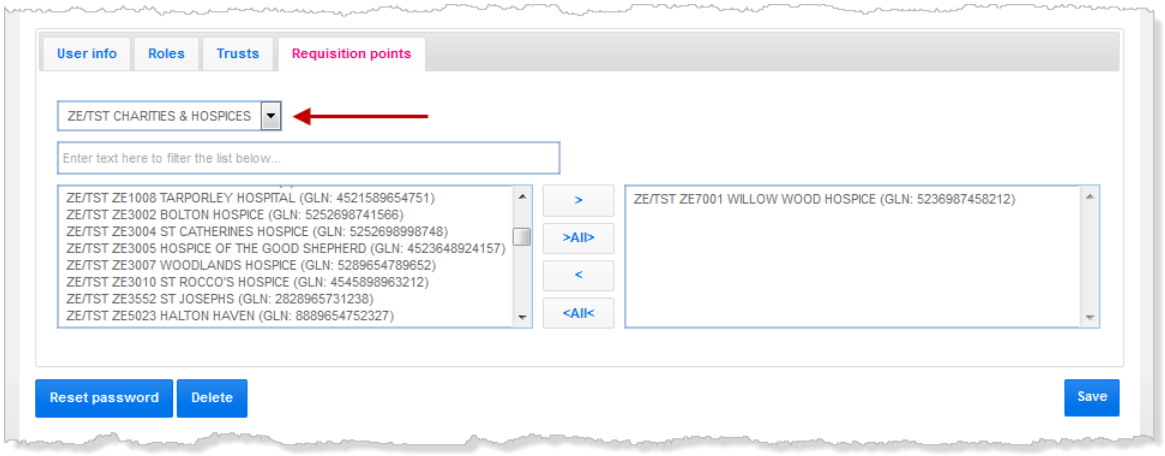


Requisition points

For each trust that this person can access, specify which requisition points should be available to him or her.

1. Select a trust that you have associated with this person from the drop-down list of trusts.
2. All of the requisition points for this trust are shown. Move the ones you want this person to be able to see and access into the box on the right.

Repeat for any other trusts that this person can access.



If this person has been given the *All requisition points* role, requisition points cannot be added or removed using this section. If you need to remove access to a requisition point, you must first remove that role.

Saving the new account

When you save the new user account, a message is displayed at the top of the page, and the options available at the bottom enable you to make any changes.

An email is sent to the email address you provided containing a temporary password. When this person logs in for the first time, he or she must change that password.

Viewing and making changes to a user account

To make changes to someone's account, select **User maintenance** from the **Admin** menu. A list of user accounts is shown.

To see all details related to an account or to make changes to it, click the username in the list of people displayed. The information you can change is explained in the sections within 'Creating a new user', beginning on page 54.

For instructions on changing someone else's password, see 'Resetting a user's password' on page 53.

You can export details of all the user accounts by clicking the **Export list** button at the bottom of the page. Details of the user accounts can be saved or viewed in a spreadsheet.

Finding a user account

The filter at the top of the page can be used to reduce the number of user accounts displayed. The example below shows the person's username being used to filter the records, which results in just one record (as usernames are unique).

If you do not know the person's username, you can use the person's real name. Both **Username** and **Full name** can be used to display a list of people whose names contain the letters you specify, in that order. There are some additional rules that determine whether you are searching using surname or forename, and you can optionally include the person's title in the search.

- Type the forename followed by a space to search for everyone with that forename (the space is important – without it the system will search surnames.

  For example, typing **anne** followed by a space will find anyone whose first names(s) include the letters 'anne' in that order (such as Anne, Joanne and Jeannette).

- Type a name *without* a space at the end to search for someone with that as a surname. You must not add a space – if you do, the system will search forenames.

  For example, typing eck without a space will find anyone whose surname includes the letters 'eck' in that order (such as Beckham, Peck and Eckington).

- If you type a title anyone with a match title is shown. Titles are any of Mr, Mrs, Ms, Miss, Prof, Dr or Rev.

  For example, typing **Mr eck** without a space after 'eck') will find Mr Beckham and Mr Peck but not Dr Eckington).

- You can combine the options above, in the order title, forename, surname – separating each with a space.

You can also choose to display only users who have been granted a particular role, or who are associated with a warehouse, trust or requisition point.

The options to specify a **Warehouse**, **Trust** and **Requisition point** are only shown if you have access to more than one.

When you have completed the filter information – what the record must contain to be included – click **Filter**.

Viewing user details

After finding a user account in the list of accounts, you will see two icons on the right of the user's information.

Click the icon on the left to see details of that user's access (trusts, roles and requisition points) and any financial limits.

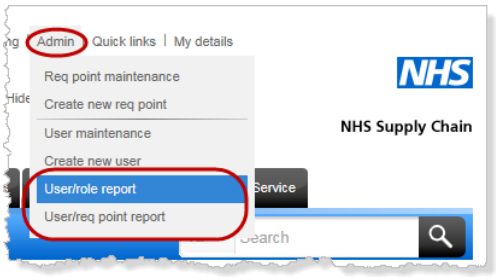
Deleting user accounts

If you have the *User maintenance* role, you can delete a user whose access levels are the same as yours or lower. You must locate and open the account details (see above) – the option to delete is at the bottom of the page.

If the deleted account has been used to authorise a standing order, alert messages are displayed to inform people of the change. These messages appear in the **Alerts** section on the **Home** page. Any affected standing orders must be re-authorised immediately by a valid authoriser.

Reports

Two reports help you to keep track of user accounts and how the system is accessed. Both reports can be accessed from the **Admin** menu.



Both reports can be opened in Microsoft Excel (or other compatible applications) or saved to your local machine.

- The **User/role report** lists the username, first name, surname, email address, date of last logon and role for each user account associated with your trust. The report is downloaded in Microsoft Excel format, and a separate entry is shown for each user role. This means, for example, that a user with four roles will have four entries in the report.
- The **User/reqpoint report** shows (for each requisition point) the username, full name, email address and financial limit of every user account associated with that requisition point. It also shows whether that account has the *Requisitioner* role and the *Authoriser* role, and the date that account was last used to connect to the system.

Inactive requisition points are included in this report if active users are associated with them.

Requisition points

You must have the *Requisition point maintenance* role to be able to create or change requisition points. If you do not have one of these roles, you cannot see this area.

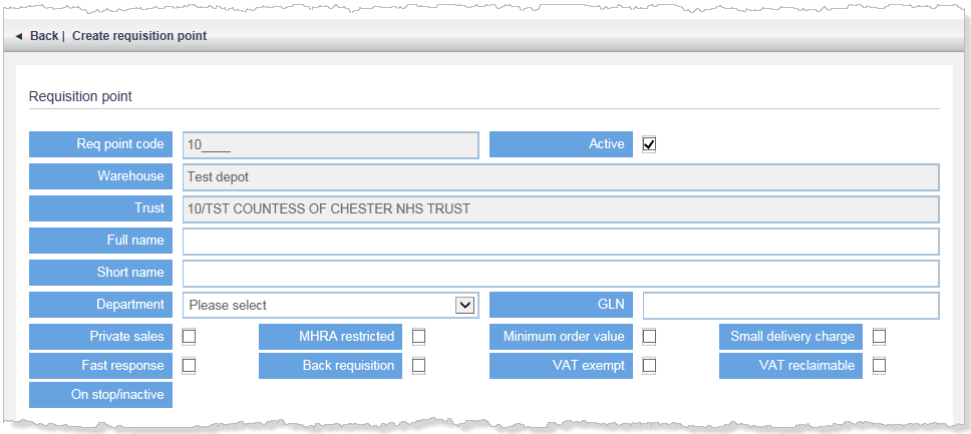
Requisition points are the places for which orders are generated – they are the lowest level in the hierarchy and are associated with the trusts in which they are located. The information stored as part of a requisition point includes the delivery locations for orders and details of other options that are available to your trust.

Changes you make to requisition points are passed to the warehousing system immediately.

Creating a requisition point

Create a requisition point when you need to add somewhere that is responsible for ordering its own supplies.

1. Select **Create new req point** from the **Admin** menu. The page that opens contains two sections.
2. In the first section, specify basic information about the requisition point. If requisition points for your trust are maintained by the NHS Supply Chain Customer Service team, you cannot enter any details in this section.

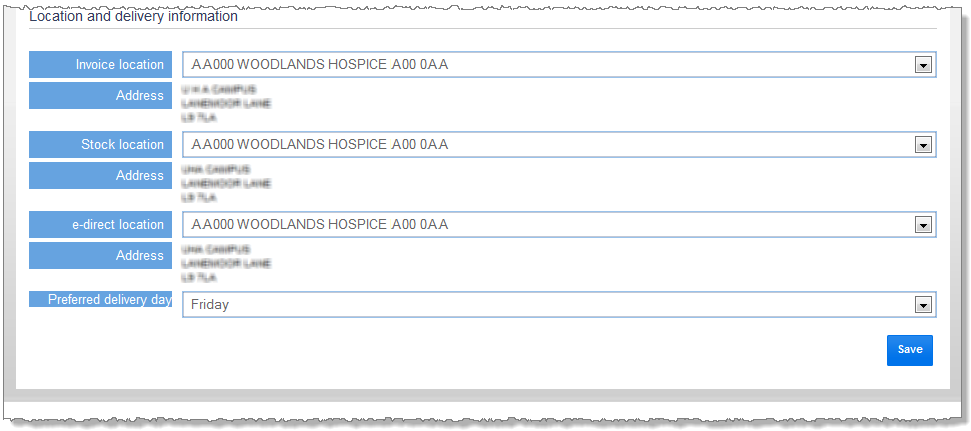


- The **Req point code** for the requisition point is created automatically when the information is saved.
- Select **Active** if you want this requisition point to be available for people to use when logging in and creating orders.
- Type the **Full name** of the requisition point (maximum of 30 characters), and a **Short name** (maximum of 12 characters) to be used whenever space is short, for example on some labels in the warehouse.
- Associate the requisition point with a **Department** by selecting one from the drop-down list. Departments are used when reporting.

- **GLN** stands for Global Location Number – if you know this information you should enter it here. It is 13 digits and is used to uniquely identify this location across systems.
- The name of the next option (**VAT invoice** or **Private sales**) depends on your organisation type. The name of the option and whether it is selected or not are determined automatically – you cannot make changes.
- The remaining settings in this section enable you to specify some financial information – if you are not sure what needs to be specified, please contact Customer Services at NHS Supply Chain.

  Small delivery indicates that orders under a certain limit (which is different for private and NHS customers) are accepted and processed. If this option is not selected, small orders will be rejected. This option is set by Customer Services – you cannot amend it.

3 The lower section contains location and delivery day information.



- Select the address where invoices should be sent that relate to orders for this requisition point.
- Select delivery addresses – one for deliveries by NHS Supply Chain (stock and Blue Diamond products) and one for suppliers (eDirect products).
- Choose your preferred delivery day from the drop-down list. The days you can select from are those specified by your local distribution centre for your area.

  You can only select one delivery day. If you need more flexibility than this, please contact Customer Services who can advise which options are available.

4 When you have finished, click **Save** to create the new requisition point.

If you make a mistake (the name you allocate is too long or you select an option that is not available for your trust), the form will clear and details for the requisition point you selected when you logged on are displayed instead. If you continue to make changes, these will be to that requisition point's details and *not* the one you were previously editing. You need to start again by selecting the correct option from the menu.

Amending an existing requisition point

To amend an existing requisition point:

1 Select **Req point maintenance** from the **Admin** menu. The **Req point maintenance** page opens.

2 Use the filter options at the top of the page to find the requisition point you want to change:
- You can specify all or part of a requisition point code or name.
- You can restrict the list to those requisition points that are active or are inactive.
- You can restrict the list to those associated with a particular trust or a depot.

3 Click the name or code of the requisition point you want to change.

You can change any of the details apart from the **Code** that identifies the requisition point and its **Invoice location**.

4 Click **Save**.

If you need to change the delivery date, contact Customer Services. You cannot change this yourself.

De-activating and re-activating a requisition point

Requisition points are never deleted as they are required for reporting purposes but they can be de-activated. To de-activate a requisition point:

1 Edit the requisition point as described above.

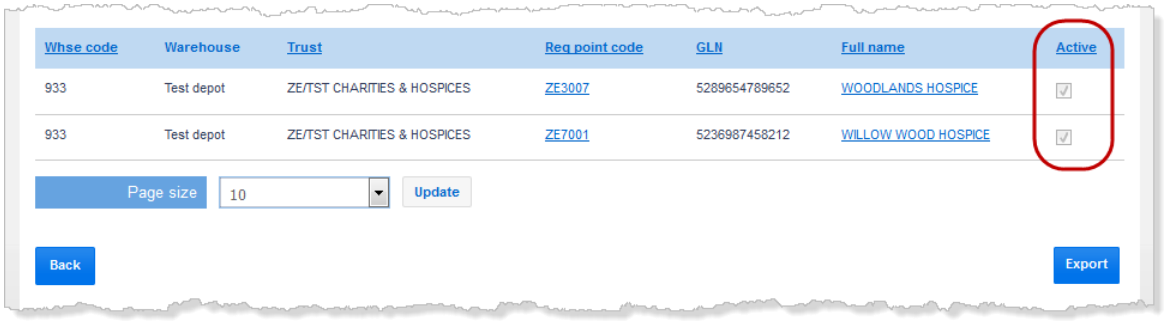
2 Clear the **Active** box.

3 Click **Save**.

De-activating requisition points removes them from the drop-down list displayed when logging on to Online Catalogue & Ordering, but they can still be accessed from the drop-down list on the requisition point maintenance page.

To re-activate a de-activated requisition point, edit it and select **Active**, then click **Save**.

The status of a requisition point – whether it is active or not – is shown on the **Req point maintenance** screen.



Whse code	Warehouse	Trust	Req point code	GLN	Full name	Active
933	Test depot	ZE/TST CHARITIES & HOSPICES	ZE3007	5289654789652	WOODLANDS HOSPICE	☑
933	Test depot	ZE/TST CHARITIES & HOSPICES	ZE7001	5236987458212	WILLOW WOOD HOSPICE	☑

Page size 10 Update

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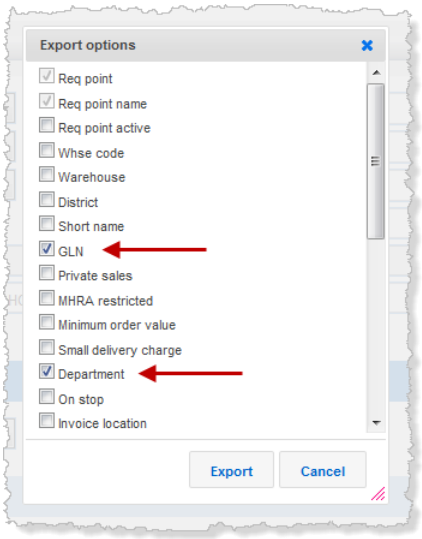
Exporting requisition point details

To export multiple requisition points to a spreadsheet, follow the steps in ‘Amending an existing requisition point’ on page 62. When the requisition point (or list of requisition points) matching your search criteria is displayed:

1. Click **Export** at the bottom of the list.
2. Select the fields you want to be included in the spreadsheet – the values for each selected field are exported into a column, so you can filter and sort them.



3. You can choose whether to open the file immediately or save it to disk.

Masking parts of the catalogue

You must have the *Masking* role to be able to change mask part of the catalogue. If you do not have this role, you cannot see this area.

Masking prevents the ordering of products that your trust does not want all of its staff to be able to order. The products can still be seen, and someone with the *Mask Override* role can order masked products.

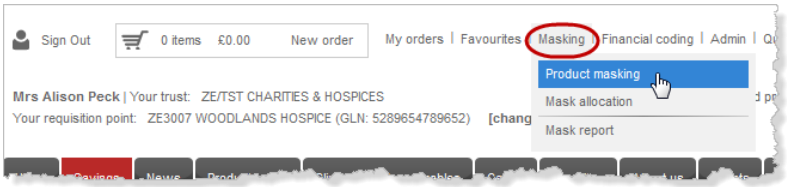
Masks are named collections of products. Each mask can be associated with one or more requisition points, but a requisition point can only be associated with one mask.

The trust-wide mask is applied automatically. This mask is associated with every requisition point, so should only contain products that no-one in the trust is permitted to order. The mask must exist, but you can remove all products from it so it has no effect.

A product cannot be ordered for a requisition point if it is masked in either a mask specifically applied to a requisition point or in the trust-wide mask (unless the person ordering has the *Mask Override* role).

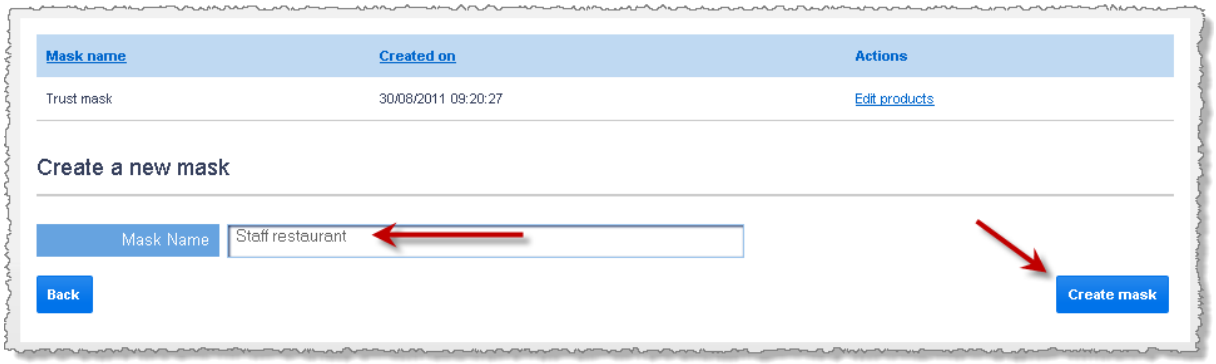
If you have access to product masking, you will find all associated options under the **Masking** option in the menu immediately below the shopping trolley.

- Select **Product masking** to create or amend product masks
- Select **Mask allocation** to apply masks to requisition points
- Select **Mask report** to get a report in PDF format showing which products are masked.



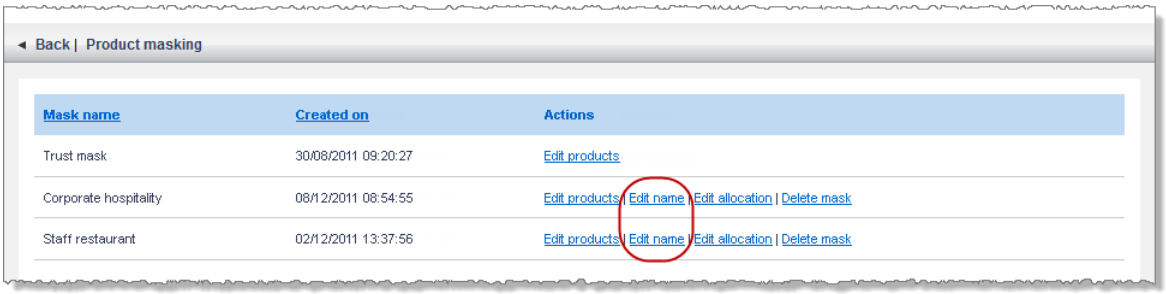
Creating a mask

Type a **Mask name** that will identify the mask in the box and click **Create mask**.



The editing page for the new mask is opened and you can begin selecting products to include. See 'Viewing and editing the products in a mask', below, for information.

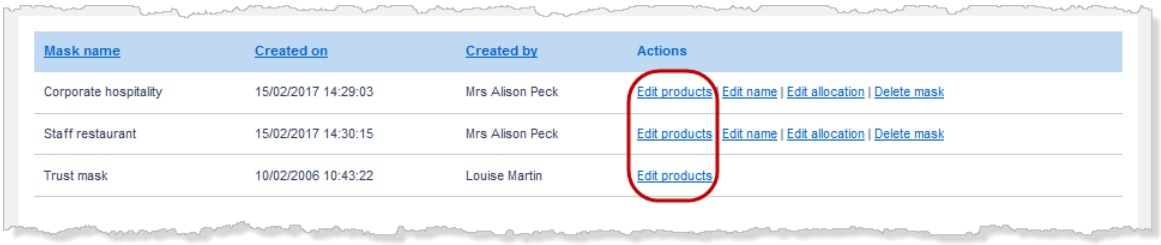
You can change the name of any mask apart from the **Trust mask** by selecting **Edit name** on the **Product masking** page.



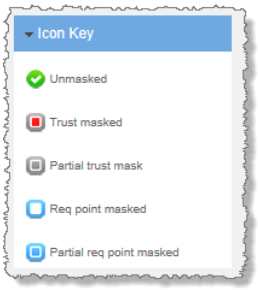
Viewing and editing the products in a mask

The page used to edit products opens automatically when a new mask is created.

To change the products in a mask, select **Product masking** from the **Masking** menu and click **Edit products** for the mask you want to edit.



A hierarchy of products is shown, with any already masked indicated by changes to the icon on their left. A key to the meanings of the icons is given on the left side of the page.



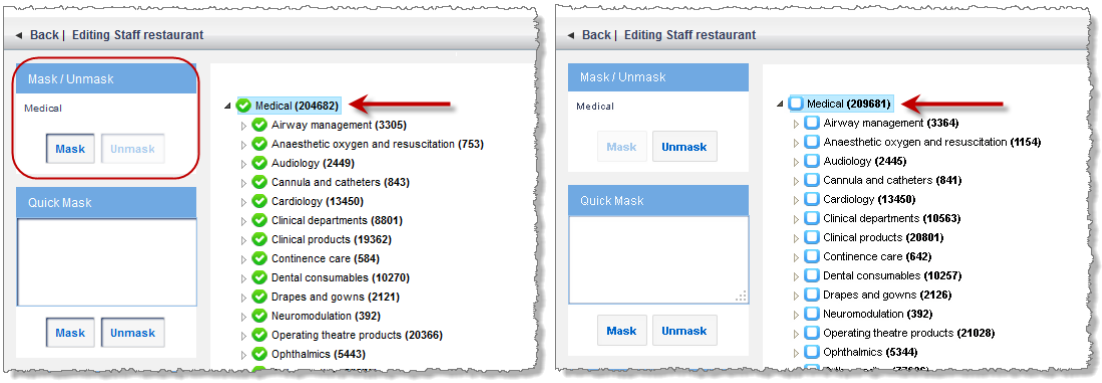
The partial icons mean that at least one item within the group is masked.

Masking or unmasking products and product groups using the hierarchy

You cannot unmask products in an individual mask that have been masked at trust level.

Using the product hierarchy display enables you to mask whole sections of the product catalogue very quickly. For example, you may want to mask all medical supplies from areas that are not medical.

1. Use your mouse to expand the product hierarchy to the level you want to see.
2. Select either an individual product or group of products that you want to mask or unmask. Details of your selection are shown in the **Mask / Unmask** box in the top left corner of the page.
3. Click **Mask** or **Unmask**.

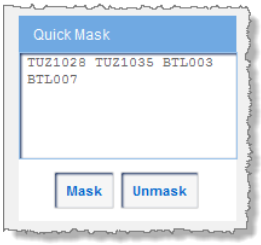


In the before-and-after examples above, the **Medical** group is selected and masked. You could, if required, then select subgroups or individual items within the **Medical** group and unmask them.

Masking and unmasking products using their product codes

If you know the NPC codes of the products you want to mask or unmask, you can type them directly into the **Quick mask** box, which is on the left of the page below the **Mask / Unmask** box.

Separate the codes from each other using spaces and click **Mask** or **Unmask**.

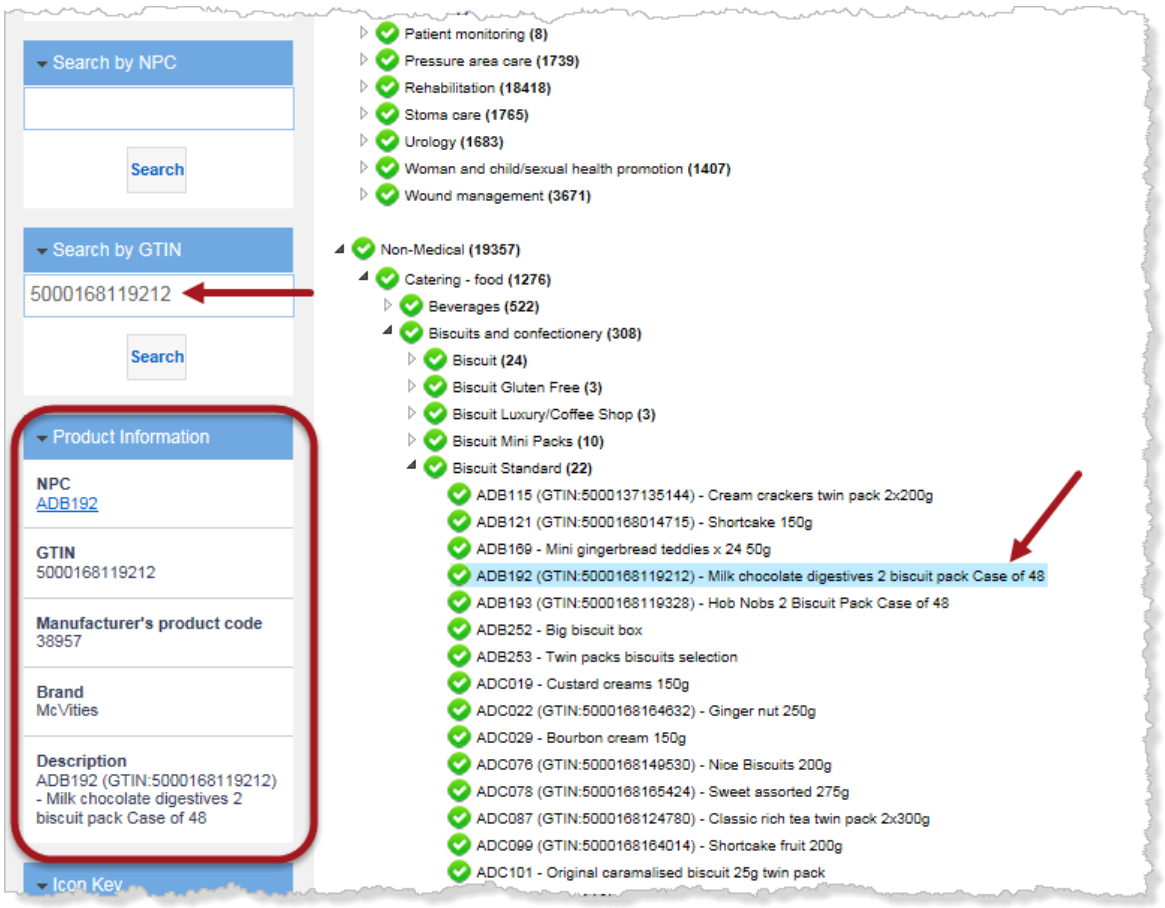


There is no confirmation of products with the **Quick mask** method – you must be sure that you are using the correct codes.

NHS Supply Chain

Searching for products using their product codes

Sometimes finding a product in the product hierarchy can be difficult, but if you have the NPC or GTIN code, you can use the appropriate **Quick search** option to locate it.



Type the NPC code into the **Search by NPC** box or the product's GTIN in the **Search by GTIN** box, and then click **Search**.

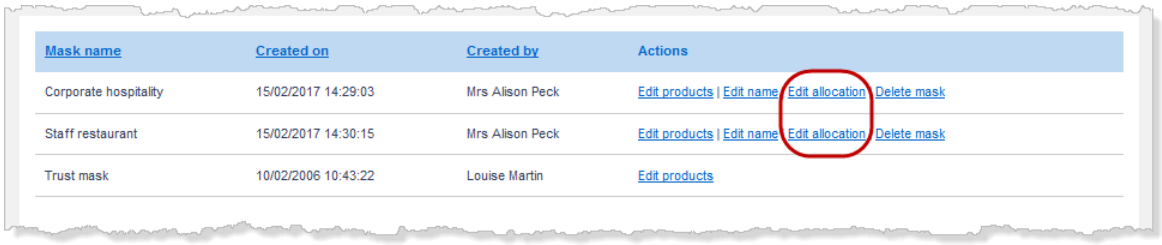
If it exists, the product is highlighted in the hierarchy and details about it are displayed in the **Product information** box. Click the NPC code in this box to open the catalogue page for the product.

If the product cannot be found, an appropriate message is displayed.

Associating masks with requisition points

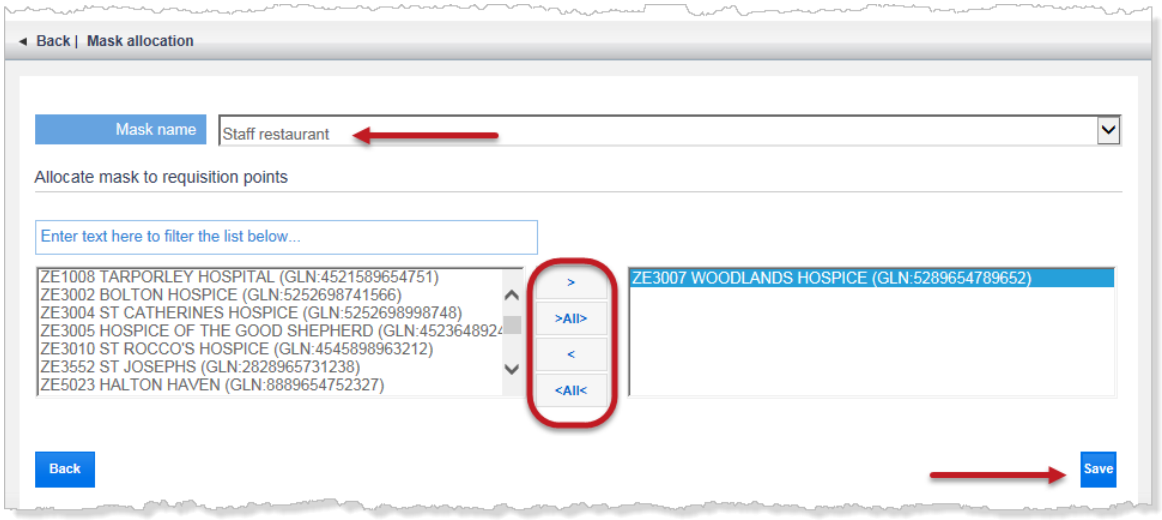
Masks are associated with requisition points on the **Mask allocation** page. To access this page, either:

- Select **Masking** and then **Mask allocation** from the menu.
- Click **Edit allocation** on the **Product masking** page.



Make sure that the correct mask is showing in the **Mask name** box at the top of the page.

Move the requisition points to which you want to apply this mask into the box on the right. If you want to stop applying a mask to a requisition point, move it back into the box on the left. Click **Save** to save your changes.



If you cannot find a requisition point in the list on the left, either it is inactive or another mask must already have been applied to it – a requisition point can only have one mask.

Mask report

A **Mask Report** is available on the **Masking** menu. It is created as a PDF document and you will need a PDF reader (such as Acrobat Reader to be able to view it.

The report shows all of the products masked for the requisition point you are currently logged on to, organised and displayed as a hierarchy.

Financial coding

You will only be able to see the **Financial coding** menu if you have either the *Financial coding* role or the *Financial coding administrator* role.

If your trust wants to produce reports that map the orders placed through the Online Catalogue & Ordering system to cost centres and expense codes, you can use the financial coding options within Online Catalogue & Ordering to do so.

The first step is to specify the trust-wide settings (the format to use for the various codes and the defaults to be applied should any values not be available). Once that has been done, you can assign codes to products. Reports enable you to monitor purchases.

Defining trust-wide settings

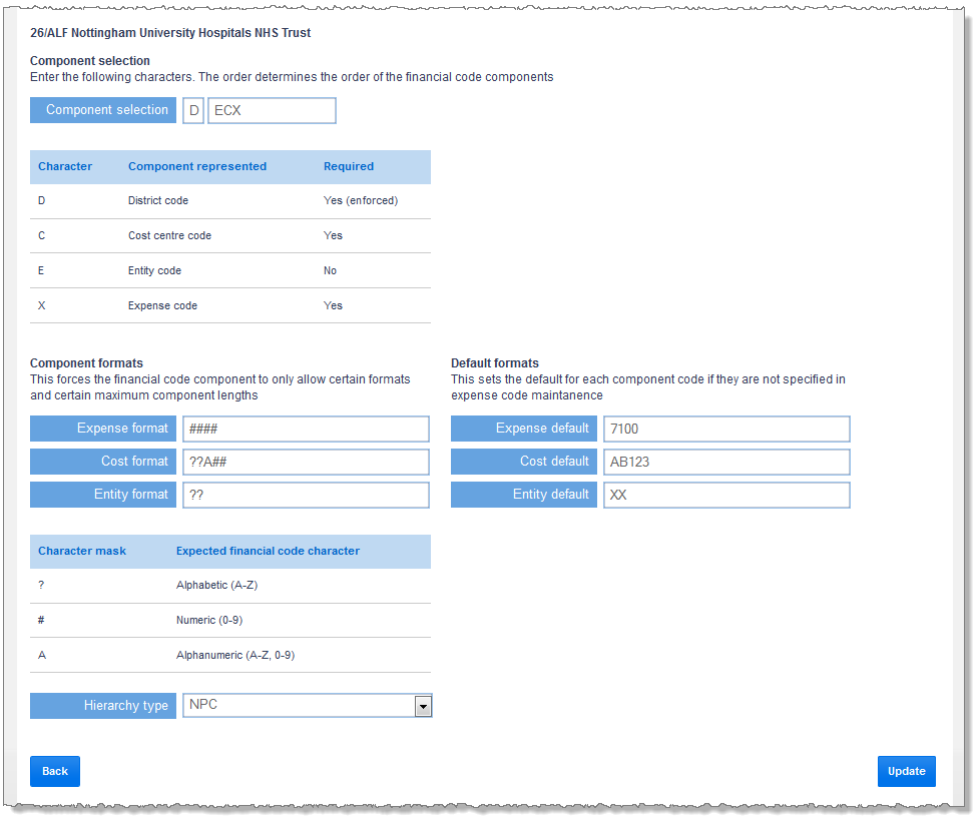
This option is only available if you have the *Financial coding administrator* role.

Trust-wide settings enable you to define the codes that you want to be allocated to products and to requisition points to ensure the resulting reports are compatible with other systems you may have in place.

The **Trust maintenance** page contains two groups of boxes:

- The upper set of boxes define the format for the financial coding used by your trust.
- The financial code comprises four elements:
  - Trust code – you cannot change this code and it must be the first element.
  - Cost centre – associated with requisition points.
  - Entity – groups of cost centres (optional).
  - Expense codes – associated with products.
- The lower set of boxes specify default values to be used for each element if none is available.

1. Select **Trust maintenance** from the **Financial coding** menu.
2. In **Component selection**, specify the order in which the cost centre, entity (if used) and expense codes should be placed in the financial code. The key to the characters representing each component are shown in the box immediately below this area.


26/ALF Nottingham University Hospitals NHS Trust

Component selection
Enter the following characters. The order determines the order of the financial code components

Component selection D ECX

Character	Component represented	Required
D	District code	Yes (enforced)
C	Cost centre code	Yes
E	Entity code	No
X	Expense code	Yes

Component formats
This forces the financial code component to only allow certain formats and certain maximum component lengths

Expense format ####
Cost format ??A##
Entity format ??

Default formats
This sets the default for each component code if they are not specified in expense code maintanence

Expense default 7100
Cost default AB123
Entity default XX

Character mask	Expected financial code character
?	Alphabetic (A-Z)
#	Numeric (0-9)
A	Alphanumeric (A-Z, 0-9)

Hierarchy type NPC

Back Update

3 Using the explanations in the box at the bottom left of the page as a guide, specify the format of each component. In the example above:

- **Expense format** has been specified as ####. This means it must comprise four numerals (**1234**, **0039** and **9000** are all valid codes).
- **Cost format** has been specified as **??A##**. This means it must be five characters long, the first two must be letters, the last two must be numerals and the middle one can be either (**AAA12**, **AB234** and **ZZ099** are all valid).
- **Entity format** has been specified as **??**. This means it must comprise two numerals (**12**, **99** and **03** are all valid).

If you have not included a particular component, the corresponding format boxes are disabled.

4 Complete the **Expense default**, **Cost default** and **Entity default** with the codes you want to be used if a specific one does not exist (for example, if no cost code has been associated with a particular requisition point).

5 Select the **Hierarchy type** from the list – you can either set expense codes by NPC or by e-class.

6 Click **Update**.

The default codes must comply with the formats you defined for codes of that type.

NHS Supply Chain

Associating cost centres (and entities) with requisition points

To ensure that purchases are linked to the correct budgets, cost centres can be linked to requisition points.

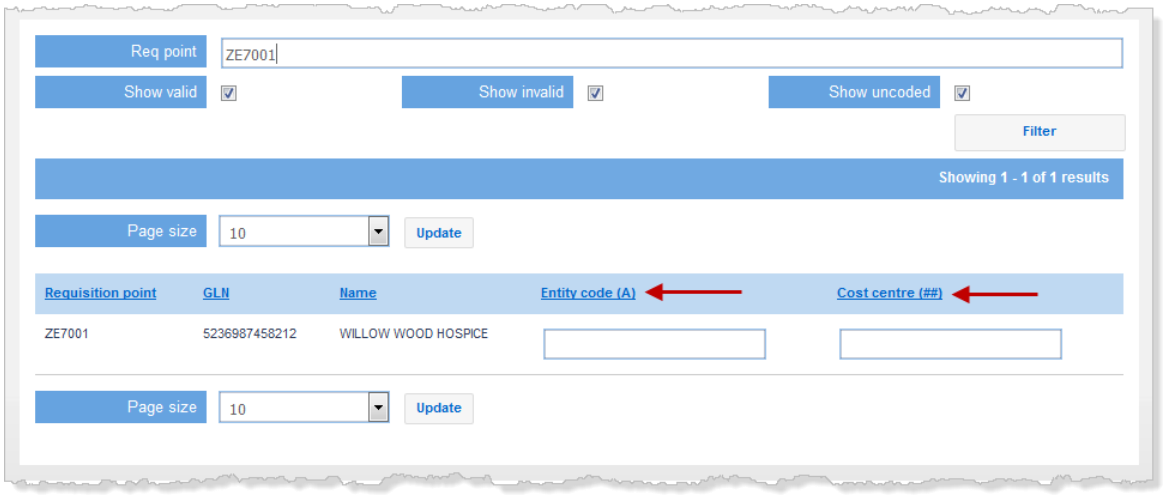
Cost centres can optionally be grouped together into entities for reporting purposes.

If a requisition point is not allocated to a cost centre, the default cost centre (and entity, if your trust is using entities) is used automatically.

1 Select **Entity/cost maintenance** from the **Financial coding** menu.

2 A list of all requisition points for your trust is shown. To reduce the number of requisition points displayed, you can:

- Type all or part of the code or name of a requisition point and click **Filter** to show only those with matching names or codes.
- Decide whether you want to **Show valid**, **Show invalid** and **Show uncoded** requisition points. Select all three to show all requisition points, or select just **Show invalid** or **Show uncoded** to display requisition points that are not correctly coded.



3 Type the entity codes (if used) and cost centre codes into the boxes, making sure they comply with the formats that have been specified for your trust.

Reminders of the formats for entity codes and cost centre codes are shown at the top of the respective columns.

You can use the same cost centre code for more than one requisition point, if that is appropriate.

Using the same **Entity code** for more than one requisition point groups them together for reporting purposes. If **Entity code** has not been listed as a component of the financial code by your trust, that column is not displayed.

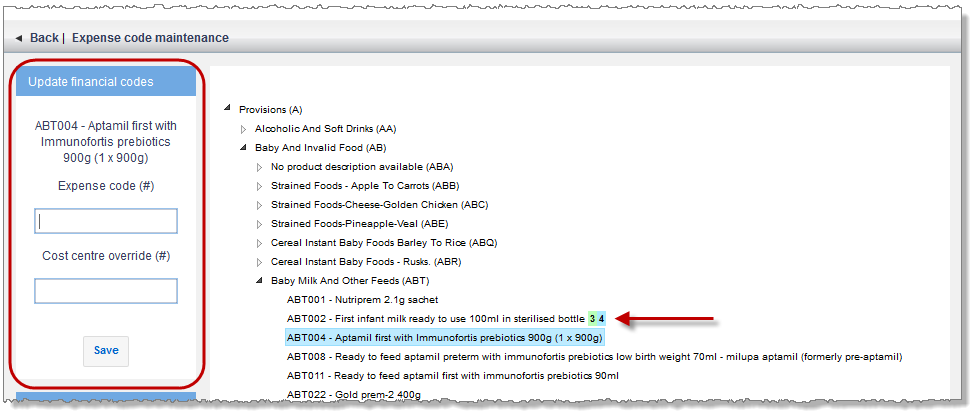
The information entered into this page is saved automatically.

Associating expense codes with products

Expense codes can be allocated to individual products. You can also set a cost centre override, so that no matter which requisition point orders a particular product, it will always be associated with a particular cost centre.

1 Select **Expense code maintenance** from the **Financial coding** menu.

2 After a few seconds, a list of products is displayed on the **Expense code maintenance** page.



- Click the small hollow triangle to the left of a category to expand it – in the example above, the **Alcoholic and Soft Drinks** category can be expanded.
- To collapse a list again, click the solid triangle to its left – in the example above, **Baby And Invalid Food** and **Baby Milk And Other Feeds** can be collapsed.

3 Select an individual product or a group of products – in the example above, **Aptamil first with Immunofortis prebiotics** has been selected.

4 Type an expense code for this product in the box on the left. Above the box the format that your trust uses for expense codes is shown, and a key to these characters is given in the section entitled **Use the following characters**.

When an expense code has been linked to a product or group of products, it is displayed to the right of the entry in the list (as shown for **First infant milk ready to use** in the example above).

5 If you want this product to always be charged to a particular cost centre, type the code of that cost centre in the second box (a **Cost centre override**). If you leave this box blank, the cost centre associated with the requisition point is used.

6 Click **SAVE**.

Importing financial coding data

Although you could manually set all of the formats and codes to meet your financial coding requirements, a quicker option can be to create the codes in a spreadsheet and then import the data.

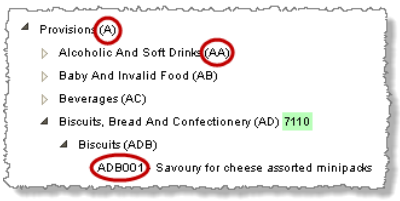
Downloading and populating the spreadsheet

1 Select **Import data** from the **Financial coding** menu.

2 Click **Download** to download a template for completion. When prompted, choose to save the template in an easily accessible location.

3 Open the template and complete the information required on the three pages:

- **Trust maintenance** – corresponds to the information on the **Trust maintenance** page.
- **Cost maintenance** – corresponds to information on the **Entity/cost maintenance** page.
- **Expense maintenance** – corresponds to information on the **Expense code maintenance** page. The alpha segment/product code column refers to the code associated with each product or product group, circled in the example below.



4 Save the file when you have finished making changes.

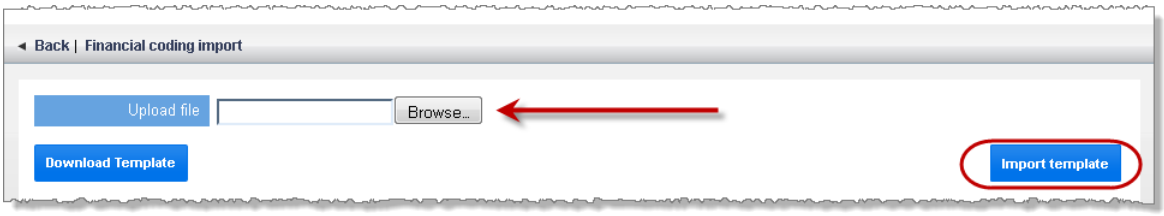
Importing the data

Any changes you make to the spreadsheet will overwrite current details when the file contents are imported.

1 Select **Import data** from the **Financial coding** menu.

2 Click **Browse**. Find and select the Excel file you have updated.

3 Click **Import template**.



Financial coding reports

Two financial coding reports are available from the **Financial coding** menu. Both are generated as PDF files and are simple listings. Invalid codes are indicated by an asterisk (*).

- **Expense code report** – lists products or product categories, the expense codes allocated and any cost centre overrides.
- **Entity/cost centre report** – lists requisition points with their associated cost centres and (if used) entity codes.