

Re-Order Analysis Import

A PharmaClik Rx Inventory User Guide



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Introduction

The **Re-Order Analysis Import** function allows inventory re-order parameters to be loaded into PharmaClik Rx from the **Re-Order Analysis Report**.

Purpose:

- This is useful for pharmacies that wish to begin monitoring inventory.
- Allows existing inventory users to re-evaluate their current re-order parameters.

Re-Order Analysis Report

The **Re-order Analysis Report** recommends inventory re-order points and re-order quantities based on average daily product usage over a selected time period. The report lists all products dispensed during the report period, regardless of whether they are monitored in inventory (the default report period is the previous 3 calendar months). This is useful to pharmacies that wish to begin monitoring inventory and allows existing inventory users to re-evaluate their current re-order parameters.

Set the report criteria

To generate the report, both the **Min On Hand Days** and **Max On Hand Days** must be specified:

- **Min On Hand:** The minimum number of days' worth of stock that the pharmacy would like to keep on hand. The default value is 7. This number will be used to calculate the suggested re-order point.
- **Max On Hand:** The maximum number of days' worth of stock that the pharmacy would like to keep on hand. The default value is 10. This value will be used to calculate the suggested re-order amount.

The extended report option **Only show re-order differences** indicates whether all products should be included on the report.

- When the checkbox is OFF, all products dispensed during the report period will be listed on the report.
- When the checkbox is ON, the report will exclude monitored products where the suggested re-order values equal the current re-order values (i.e. Current Re-Order Point = Suggested Re-Order AND Current Re-Order # Packs = Suggested Re-Order # Packs).



Ex. Only show re-order differences is selected. A monitored product's Current Re-Order Point = 150 and the Current Re-Order # Packs = 1. When the report is generated, the Suggested Re-Order Point = 150 and the Suggested Re-Order # Packs = 1. Since the current and the suggested values are both the same, this product will not be included in the report.

The report can be generated for a specific drug, manufacturer, supplier, custom class, therapeutic class, or for a combination of these criteria. When one or more of these criteria are specified, it will be indicated near the top of the report.

Advanced criteria options can be accessed by selecting the **Advanced** tab. These options allow only specific drug or manufacturer names to be included in the report. This is useful if your shelves are arranged alphabetically by generic name, trade name, or manufacturer. The advanced options are:

- **Generic Names beginning with the letter:** If you would like to see data for drugs that have generic names beginning with a specific letter, enter the letter in this field.
- **Trade Names beginning with the letter:** If you would like to see data for drugs that have trade names beginning with a specific letter, enter the letter in this field.
- **Manufacturers beginning with the letter:** If you would like to see data for drugs that have a manufacturer code beginning with a specific letter, enter the letter in this field.

Decide how to sort the report

Several sort options are available; the selected option will be shown in the **Sorted By** field on the report. The sort options are:

- **Acquisition Cost:** Products will be listed by acquisition cost in descending order. Products with the highest Acq Cost will be at the top of the report and those with no Acq Cost will be at the end of the report.
- **DIN:** Products will be listed by DIN in ascending order.
- **Generic Name:** Products will be listed in alphabetical order based on the drug's generic name. This is the default sort option.
- **Manufacturer, Generic Name:** Products will be listed in alphabetical order based on the manufacturer code. Within each manufacturer, the products will be listed alphabetically by generic name.
- **Manufacturer, Trade Name:** Products will be listed in alphabetical order based on the manufacturer code. Within each manufacturer, the products will be listed alphabetically by trade name.
- **On Hand:** Products will be listed by the On Hand amount in descending order. Products with the highest On Hand amount will be at the top of the report and those that are not monitored will be at the end of the report.
- **Qty Disp:** Products will be listed by the Qty Disp value in descending order. Products with the highest quantity dispensed will be at the top of the report and those with the lowest quantity dispensed will be at the end of the report.
- **Supplier Cost:** Products will be listed by the Sup Cost in descending order. Products with the highest supplier cost will be at the top of the report and those with no supplier cost will be at the end of the report.
- **Trade Name:** Products will be listed in alphabetical order based on the drug's trade name.

Re-Order Analysis

Pro Pharmacy
131 McNabb Street
Markham, Ontario L3R 5V7

Date: Aug 08, 2003

Report Period: Jan 01, 2003 to Jul 31, 2003

Only show products with differences between the current re-order values and the suggested re-order values. Sorted By: Generic Name

Min Days On Hand: 7 Max Days On Hand: 10

DIN	Generic Name	Trade Name	Strength	Form	Mfr	Pack Size	Qty Disp	On Hand	Current		Suggested		Sup Cost	Acq Cost
									Re-Order Point	Re-Order # Packs	Re-Order Point	Re-Order # Packs		
2238704	17-BETA ESTRADIOL	ESTROGEL	0.06%	GEL W/AP	SCH	80	160	240	24	1	5	1	\$0.2356	\$0.2356
2112760	5-AMINOSALICYLIC ACID	SALOFALK	500MG	SUPP.REC	BFI	30	90	100	14	1	3	1	\$1.1440	\$1.1440
2099683	5-AMINOSALICYLIC ACID	PENTASA	500MG	TABLET S	FEI	240	1480	1226	225	1	49	1	\$0.5848	\$0.5848
1997580	5-AMINOSALICYLIC ACID	ASACOL	400MG	TABLET, D	PGP	100	5320	1360	810	9	176	1	\$0.5198	\$0.5198
2112787	5-AMINOSALICYLIC ACID	SALOFALK	500MG	TABLET, D	BFI	150	2240	1092	341	3	74	1	\$0.5082	\$0.5082
2190885	ACARBOSE	PRANDASE	50MG	TABLET	BAH	120	953	264	145	1	31	1	\$0.2259	\$0.2259
2237721	ACEBUTOLOL HCL	GEN-ACEBUTOLOL	100MG	TABLET	GEN	100	488	286	200	1	16	1	\$0.1720	\$0.1720
2237722	ACEBUTOLOL HCL	GEN-ACEBUTOLOL	200MG	TABLET	GEN	100	60	170	15	1	2	1	\$0.2575	\$0.2440
863270	ACETAMINOPHEN	TYLENOL EXTRA STRENGTH SG	500MG	TABLET	MCL	0	30	N/A	0	0	1	1*	\$0.1158	
2163918	ACETAMINOPHEN/CODEINE COM	TYLENOL NO. 4	60MG	TABLET	JNO	100	30	330	142	2	1	1	\$0.1384	\$0.1384
545015	ACETAZOLAMIDE	APO-ACETAZOLAMIDE	250MG	TABLET	APX	100	56	329	43	1	2	1	\$0.0325	\$0.0325
545015	ACETAZOLAMIDE	APO-ACETAZOLAMIDE	250MG	TABLET	APX	500	178	N/A	0	0	6	1	\$0.0987	\$0.0950
216666	ACETYLSALICYLIC ACID	NOVASEN	325MG	TABLET, D	NOP	1000	211	4156	3190	4	7	1	\$0.0147	\$0.0147
569771	ACYCLOVIR	ZOVIRAX	5%	OINT.(GM)	GSK	4	5	16	4	1	0	1	\$3.4375	\$3.4375
634506	ACYCLOVIR	ZOVIRAX	200MG	TABLET	GSK	250	350	242	90	1	12	1	\$1.1310	\$1.1310
803529	ALPHA 1/PROTEINASE INHIB (HU	PROLASTIN	1000MG	VIAL	MIT	40	1200	N/A	0	0	40	1	\$3.5100	
878936	AMLODIPINE	NORVASC	10MG	TABLET	PFI	250	1608	882	382	2	53	1	\$1.9000	\$1.9000
628115	AMOXICILLIN	APO-AMOXI	250MG	CAPSULE	APX	100	60	N/A	0	0	2	1	\$0.1089	
2003	AMPICILLIN	PENBRITIN	250MG	CAPSULE	AYE	0	100	N/A	0	0	3	1*	\$0.1414	
4596	AZATHIOPRINE	IMURAN	50MG	TABLET	GSK	100	200	1	0	1	7	1	\$0.8600	\$0.8600
323071	BETAMETHASONE DIPROPIONAT	DIPROSONE	0.05%	CREAM(G	SCH	450	250	N/A	0	0	8	1	\$0.2273	
1925350	BETAMETHASONE DIPROPIONAT	TARO-SONE	0.05%	CREAM(G	TAR	450	100	N/A	0	0	3	1	\$0.2153	
417246	BETAMETHASONE DIPROPIONAT	DIPROSONE	0.05%	LOTION	SCH	30	30	N/A	0	0	1	1	\$0.2090	
417246	BETAMETHASONE DIPROPIONAT	DIPROSONE	0.05%	LOTION	SCH	75	300	N/A	0	0	10	1	\$0.2090	
344923	BETAMETHASONE DIPROPIONAT	DIPROSONE	0.05%	OINT.(GM)	SCH	450	250	N/A	0	0	8	1	\$0.2273	

* This is the suggested re-order quantity in units. The Re-Order # Packs cannot be determined because the pack size is 0.

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When the Extended report criteria **Only show re-order differences** is ON, a note near the top of the report indicates 'Only show products with differences between the current re-order values and the suggested re-order values. No note is printed when **Only show re-order differences** is OFF.

Min Days On Hand The minimum number of days' worth of inventory to keep on hand, taken from the setting in the **Min On Hand** field in the report criteria.

Max Days On Hand The maximum number of days' worth of inventory to keep on hand, taken from the setting in the **Max On Hand** field in the report criteria.

DIN The DIN for the dispensed drug.

Generic Name The generic name of the drug.

Trade Name The trade name of the drug.

Strength The strength of the drug.

Form The dosage form of the drug.

Mfr	The 3-letter manufacturer code for the drug.
Pack Size	The package size from which prescriptions have been dispensed during the report period.
Qty Disp	The amount of the drug that has been dispensed from the corresponding pack size during the report period.
On Hand	The current on hand amount for the pack size, as taken from Drug > Inventory . If the product is not monitored, N/A will be displayed. This indicates the product has been dispensed during the report period, but it is not monitored in inventory.
Current Re-Order Point	The current re-order point for the pack size. This is taken from the Re-Order Point field in Drug > Inventory .
Current Re-Order # Packs	The current re-order # packs for the pack size. This is taken from the Re-Order # Packs field in Drug > Inventory .
Suggested Re-Order Point	<p>The suggested re-order point, based on the average daily usage for the report period and the minimum number of days of on hand inventory. The final value from the calculation is rounded to the nearest whole number.</p> <p><i>Calculation:</i> $\frac{\text{Qty Disp}}{\text{\# Days in Report Period}} \times \text{Min Days On Hand} = \text{Suggested Re-Order Point}$</p>
Suggested Re-Order # Packs	<p>The suggested re-order # packs, based on the average daily usage for the report period and the maximum number of days of on hand inventory. The final value from the calculation is rounded to the nearest whole number. When the final value is less than 1 (ex. 0.3), the value is rounded up to 1.</p> <p>When the Pack Size is 0, the Suggested Re-Order # Packs cannot be determined, therefore an asterisk is displayed beside the quantity. This indicates that the value is a Suggested Re-Order Qty, not a Re-Order # Packs (the asterisk is referenced at the bottom of each page). If the user wishes to monitor pack sizes for this drug, divide the quantity by the appropriate pack size to determine the Suggested Re-Order # Packs.</p> <p><i>Calculation:</i> $\frac{\text{Qty Disp}}{\text{\# Days in Report Period}} \times \text{Max Days On Hand} = \text{Max On Hand}$</p> <p>$\text{Max On Hand} - \text{Suggested Re-Order Point} = \text{Suggested Re-Order Qty}$</p> <p>$\frac{\text{Suggested Re-Order Qty}}{\text{Pack Size}} = \text{Suggested Re-Order \# Packs}$</p>
Sup Cost	The per unit supplier price for the pack size. This is taken from the Price (ut) field for the Rank 1 supplier in the Pack Detail section of Drug > Inventory .
Acq Cost	The per unit acquisition cost for the pack size. This is taken from the Acq Cost (ut) field in the Pack Detail section of Drug > Inventory . If the Acq Cost (ut) field is blank in PharmaClik Rx, it will be blank on the report.

Using the Re-Order Analysis Import



Re-Order
Analysis
Import
Utility

Before using the **Re-Order Analysis Import** function, verify that the **Reorder Analysis Import** icon is in the **McKesson PTS Utilities** folder on your server's desktop.

This icon is used to import the **Suggested Re-Order Point** and **Suggested Re-Order # Packs** from the **Re-Order Analysis Report**.

If the icon is not located in the folder, contact PTS Customer Care at 1-800-387-6093.

**** YOUR EXPORTED FILE MUST BE NAMED REORDER.TXT ****

PART 1: Generate the Re-Order Analysis Report

1. Open **PharmaClik Rx Reports** on the **SERVER**.
2. Highlight **Re-Order Analysis** in the **Select a Report** window.
3. Select **Next**.
4. Enter the **Start Date** and **End Date**.
5. Enter the **Min On Hand Days**.
6. Enter the **Max On Hand Days** (this defaults to 10).
7. Enter any additional report criteria or advanced report criteria. (Optional)
8. Select the **Sort Options** tab.
9. Select the method in which the report should be sorted.
10. Select **Preview**.
11. Select **Print** once the report displays on the screen.
12. Select **Save**.

13. The **Save As** window opens. The file must be saved in the C: drive on the SERVER in the path:
 - a. **C:\REORDER.TXT**
 - b. Select **(C:)** from the **Save in** drop-down list.
 - c. Enter **REORDER.TXT** in the **File name** field.
 - d. Select **CSV** from the **Save as type** drop-down list.



14. Select **Save**. If a REORDER.TXT file already exists in the folder, a prompt displays to confirm if you want to replace the existing file.
15. Select **Yes**.

PART 2: Review and Edit the Import File

Before importing the file into PharmaClik Rx, review and edit the suggested re-order parameters for each drug listed on the report (**optional**).



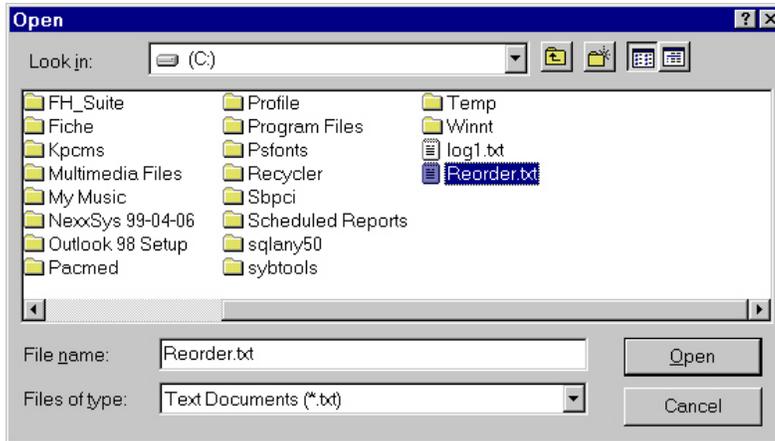
IMPORTANT!

- The report can be edited in a text file or in a Microsoft Excel spreadsheet – instructions for each are provided on the following pages.
- The report **CANNOT** be edited from C:\
- To edit the file, you can modify it from any other file location (e.g. the desktop, My Documents, OneDrive or move it to a different computer).

To Edit the Import File in a Text File

1. Minimize all applications on the server.
2. Select the **Windows** or **Start** button on the Taskbar.
3. Open **Notepad**. Notepad opens in a blank window.
4. Select **File** in the upper left side of the window.

5. Select **Open**. The **Open** window displays. The file is saved in the C: drive on the SERVER.
 - a. Select (C:) from the **Look in** drop-down list.
 - b. Highlight **REORDER.TXT** in the list of folder and files located in center of the window. The **File name** field should say **REORDER.TXT**.



6. Select **Open**. The import file opens in the Notepad window. The products are listed in the same order as they are on the printed version of the report. On the screen, the columns in the report are separated by commas. The Suggested Re-Order Point and Suggested Re-Order # Packs are displayed to the left of the cost information.



Ex. For the drug shown below, the 5.000000 is the **Suggested Re-Order Point** and the 2.000000 is the **Suggested Re-Order # Packs**.

19156,DIAMOX,ACETAZOLAMIDE,WAY,2238073,500MG ,CAPSULE SA,0,0,90.000000,,5.000000,2.000000,,0.735800,0.735800,0,,,,Generic Name



Tip: It is easiest to view the file when **Word Wrap** is turned off. Select **Edit** at the top of the Notepad window. If there is a checkmark to the left of **Word Wrap**, then **Word Wrap** is turned ON. To turn **Word Wrap** off, select **Word Wrap** in the Edit menu. The data in the window resets to display the information for each drug on a single line.

7. Using the printed version of the **Re-Order Analysis report** for reference, review and update the **Suggested Re-Order Point** and the **Suggested Re-Order # Packs**.
8. Save the file periodically by selecting **File > Save**.
9. When you are finished editing the file, save it one more time and then exit Notepad.
10. To exit, select **File > Exit**.

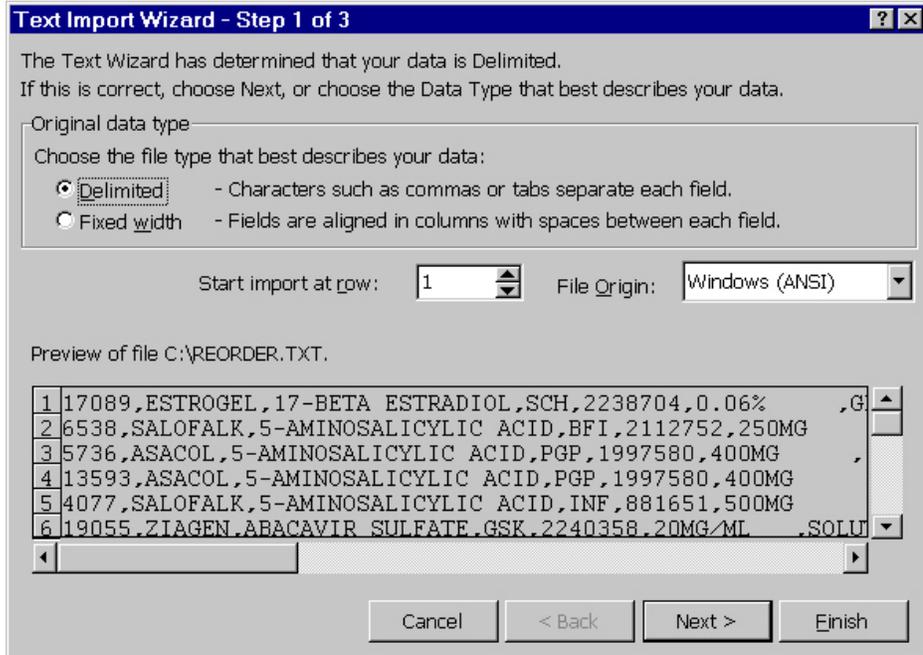
To Edit the Import File in Microsoft Excel

An alternative, and easier, method of editing the import file is to use a Microsoft Excel spreadsheet. If you do not have Microsoft Excel loaded on your server, you can save the file and edit it on a different computer. Once the editing is complete, resave the file on the server.

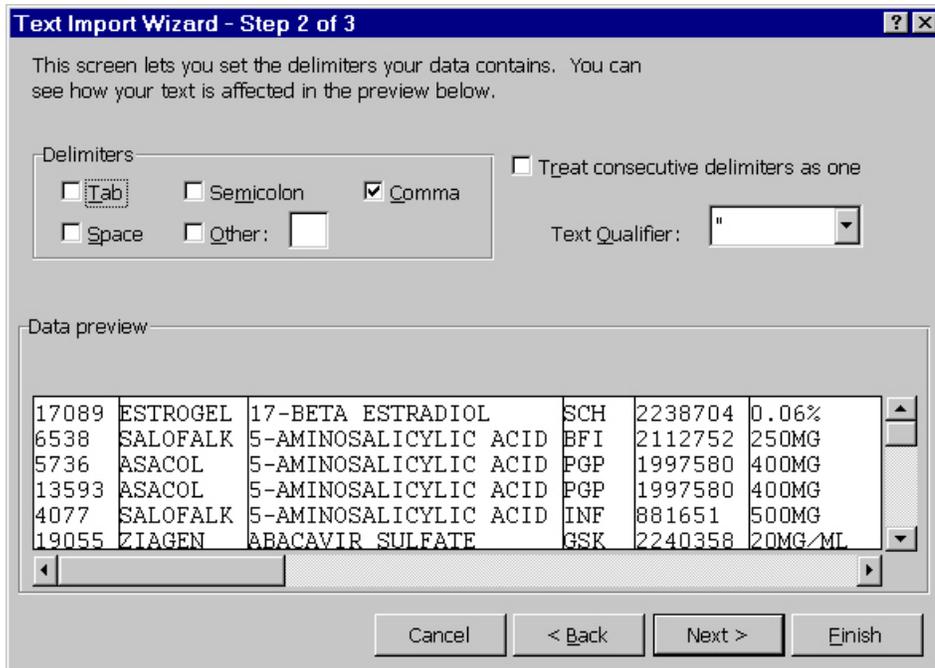
1. Open Microsoft Excel.
2. Select **File** in the upper left side of the Excel window.
3. Select **Open**. The **Open** window displays.
4. Find and highlight **REORDER.TXT** in the list of folder and files located in center of the window. The **File name** field should say **REORDER.TXT**.

5. Select **Open**. The **Text Import Wizard** opens. The first window is Step 1 of 3. As shown in the screen below;

- **Delimited** should be selected under **Original date type**.
- **Start import at row** should be set to **1**.
- **File Origin** should be set to **Windows (ANSI)**.



6. Select **Next**. Text Import Wizard – Step 2 of 3 displays.
- Select **Comma** under *Delimiters*.
 - Deselect any other checkboxes.



7. Select **Next**. Text Import Wizard – Step 3 of 3 displays. Do not make any changes in this window.

Text Import Wizard - Step 3 of 3

This screen lets you select each column and set the Data Format.

'General' converts numeric values to numbers, date values to dates, and all remaining values to text.

Column data format:

- General
- Text
- Date: MDY
- Do not import column (Skip)

Data preview

General	General	General	General	General	General
17089	ESTROGEL	17-BETA ESTRADIOL	SCH	2238704	0.06%
6538	SALOFALK	5-AMINOSALICYLIC ACID	BFI	2112752	250MG
5736	ASACOL	5-AMINOSALICYLIC ACID	PGP	1997580	400MG
13593	ASACOL	5-AMINOSALICYLIC ACID	PGP	1997580	400MG
4077	SALOFALK	5-AMINOSALICYLIC ACID	INF	881651	500MG
19055	ZIAGEN	ABACAVIR SULFATE	GSK	2240358	20MG/ML

Buttons: Cancel, < Back, Next >, Finish

8. Select **Finish**. The import file opens in Microsoft Excel. The Suggested Re-Order Point is displayed in column **N**. The Suggested Re-Order # Packs is displayed in column **P**.
9. Using the printed version of the Re-Order Analysis report for reference, review and update the Suggested Re-Order Point and the Suggested Re-Order # Packs for each product.

 **Tip:** Manual calculations are required when the **Suggested Re-Order # Packs** has an asterisk on the printed report. The asterisk indicates that the amount is a **Re-Order Quantity**. To calculate the appropriate **Re-Order # Packs**, divide the **Re-Order Quantity** by the pack size that you wish to monitor.

10. Save the file periodically by selecting **File > Save**. When you are finished editing the file, save it one more time and then exit Microsoft Excel.
11. To exit, select **File > Exit**.

PART 3: Apply the Import File

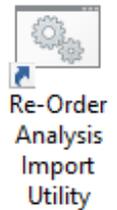
The edited import file must be applied on the server. If the file was edited on a different computer, move the file back to the **SERVER** and resave it as **C:\REORDER.TXT**.



IMPORTANT!

The import runs as soon as you double-click the Re-Order Analysis Import Utility icon. Make sure C:\REORDER.TXT is in place before you start.

1. Minimize all applications on the **SERVER**.
2. Open the **McKesson PTS Utilities** folder.
3. Double-click on the **Reorder Analysis Import Utility** on the desktop. Some windows will flash on the screen.



Note: *Do not touch the computer during this process. The windows will close as soon as the file has been applied.*

In PharmaClik Rx, the **Re-Order Point** and **Re-Order # Packs** will be updated for each **MONITORED** product that was included in the import file and the **Re-Order Analysis Report**.

4. **Verify** some of the drugs that were in your import, to ensure it was successful.