REPUBLIC OF GHANA

MINISTRY OF HEALTH

GHILMIS SYSTEM END-USER AID

Order Management Functionality

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Acronyms

DHD	District Health Directorate
PO	Purchase Order
RMS	Regional Medical Stores
SOP	Standard Operating Manual
SDP	Service delivery point

Introduction

The procedures described in this manual is for officers at the health facility ordering commodities from the RMS. The requisition(s) are created for the Head of Facility/Facility In-Charge/District Health Directorates to review and approve or reject.

Purpose of the Manual

This SOP Manual is intended to simplify and standardize the functions of order creation at the SDP.

Why should you use this manual?

This manual will enable you to carry out order creation at SDP

Whom to perform this Activity

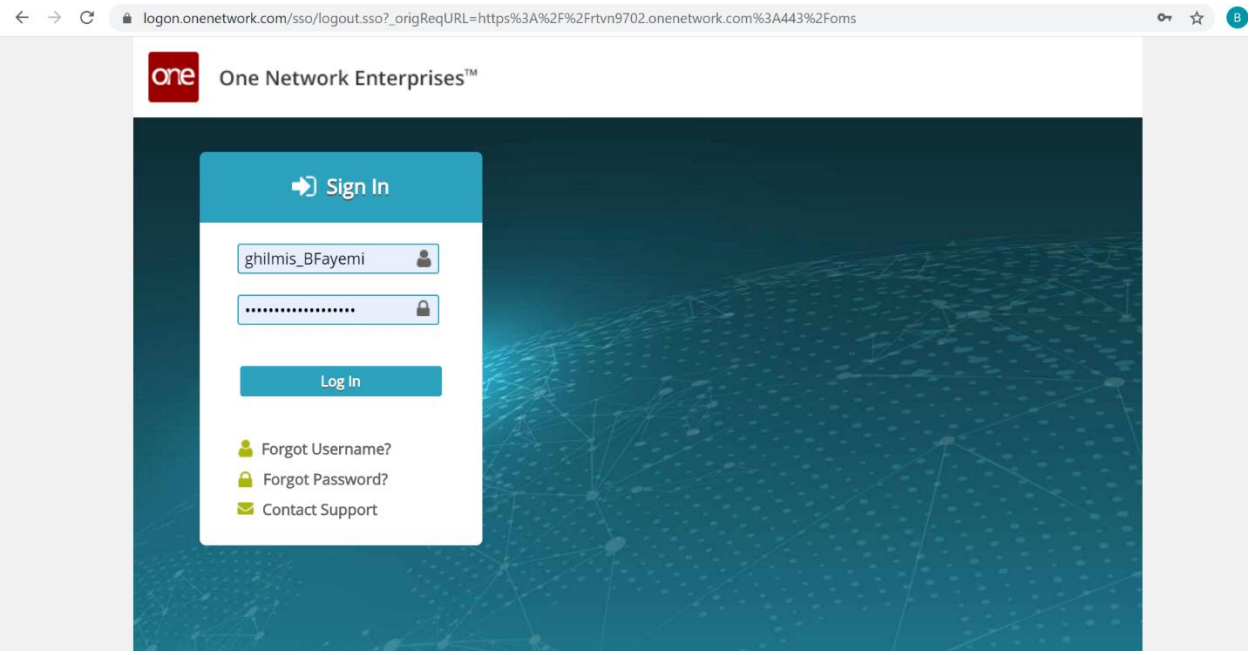
Customer Order Admin

Customer Order Manager

How to perform this Activity

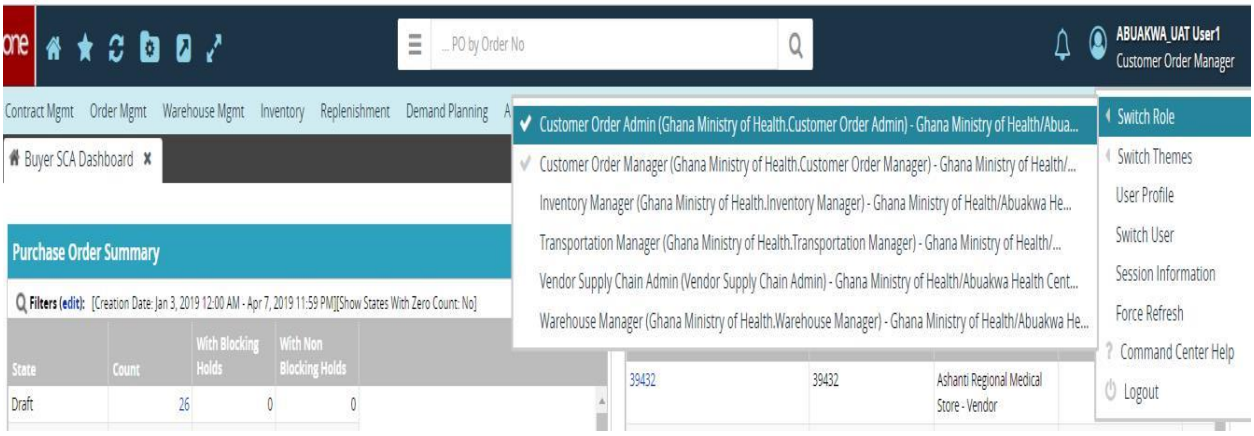
Log in to the url: www.rtvn9702.onenetwork.com

Type in your username and password to log in

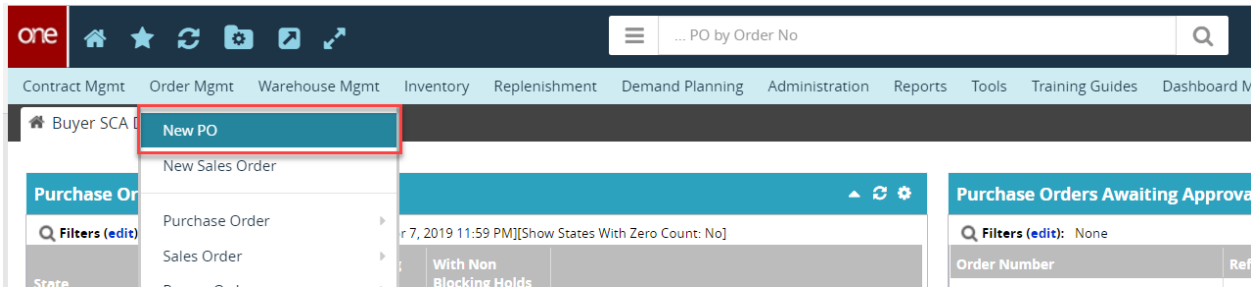


Purchase Order (PO) creation

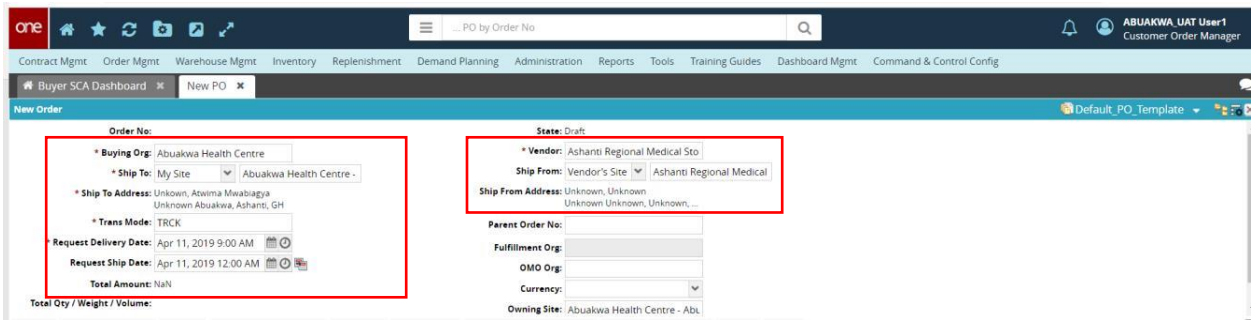
- Log in as a customer order admin at your facility



- To create a new purchase order, navigate to Order Management then select New PO



- To complete the header, populate the mandatory fields marked with asterisks (*) on the order header as shown and explained below:



*Vendor: Click on the space provided type the name of your RMS. you can also select from the list that drops down as you type the name of the RMS

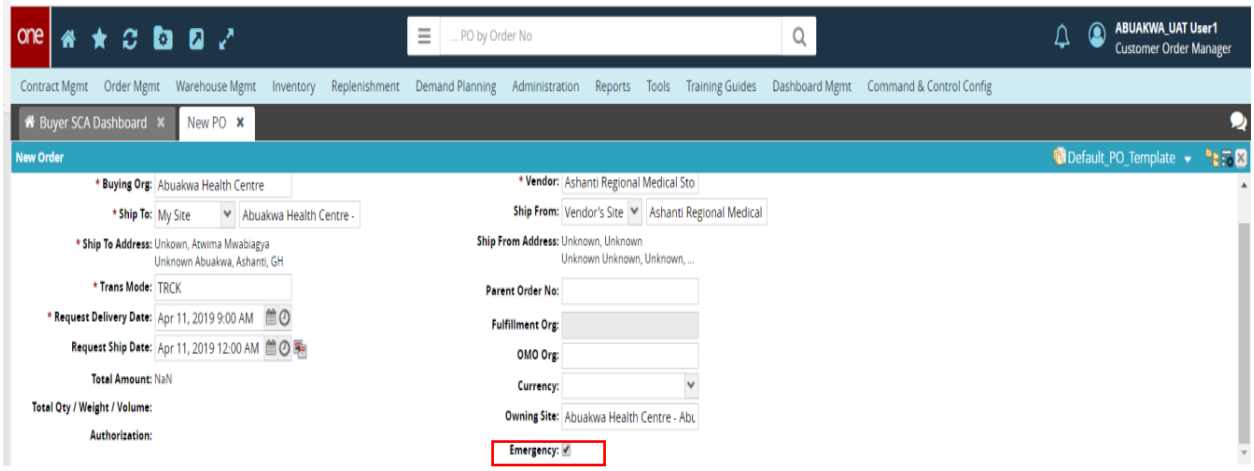
*Ship To: Enter the name of your facility

Ship from: Enter the name of the RMS

*Trans Mode: Enter "TRCK" in this space.

*Request Delivery Date: Click on the calendar by the space provided and select the appropriate Date. Note; this is the date estimated for the RMS to deliver the shipment from the Supplier (RMS) to your facility.

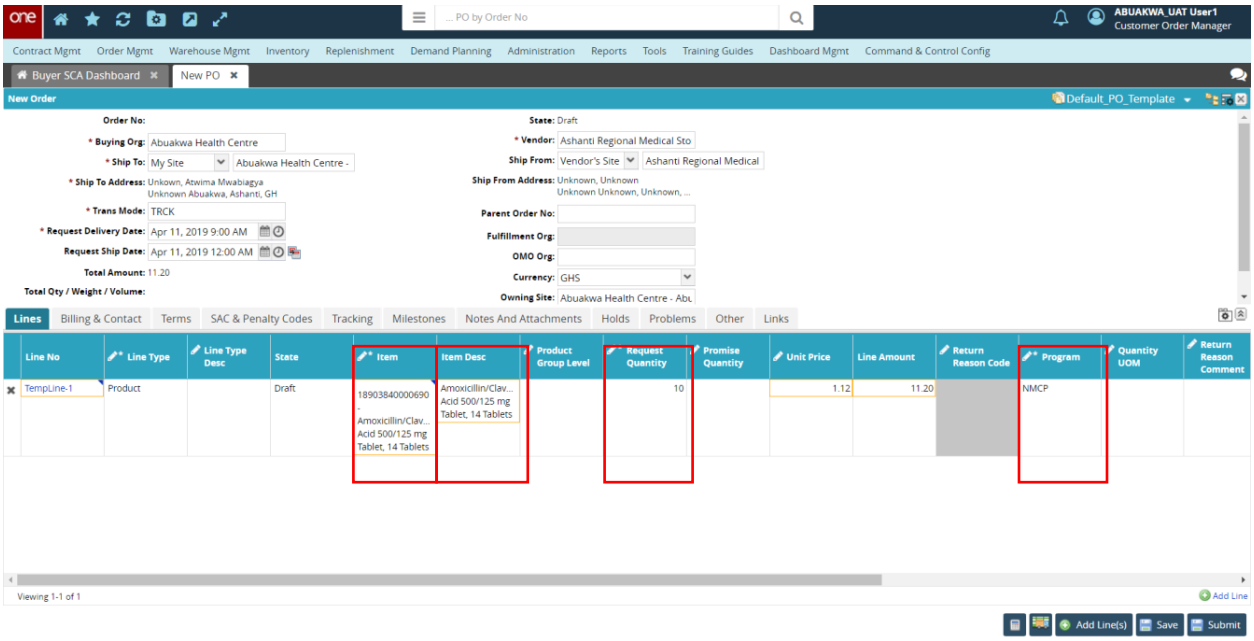
- To create an emergency order, tick the box by "Emergency".



- After filling the above information, next is to complete line details,
-

Note that for every line, there are three key requirements,

- populate Item,
- Request Quantity
- Program



- Saving the order: Save the order immediately you are done populating the first line. At the bottom right corner, click on ***save*** as shown in the picture below
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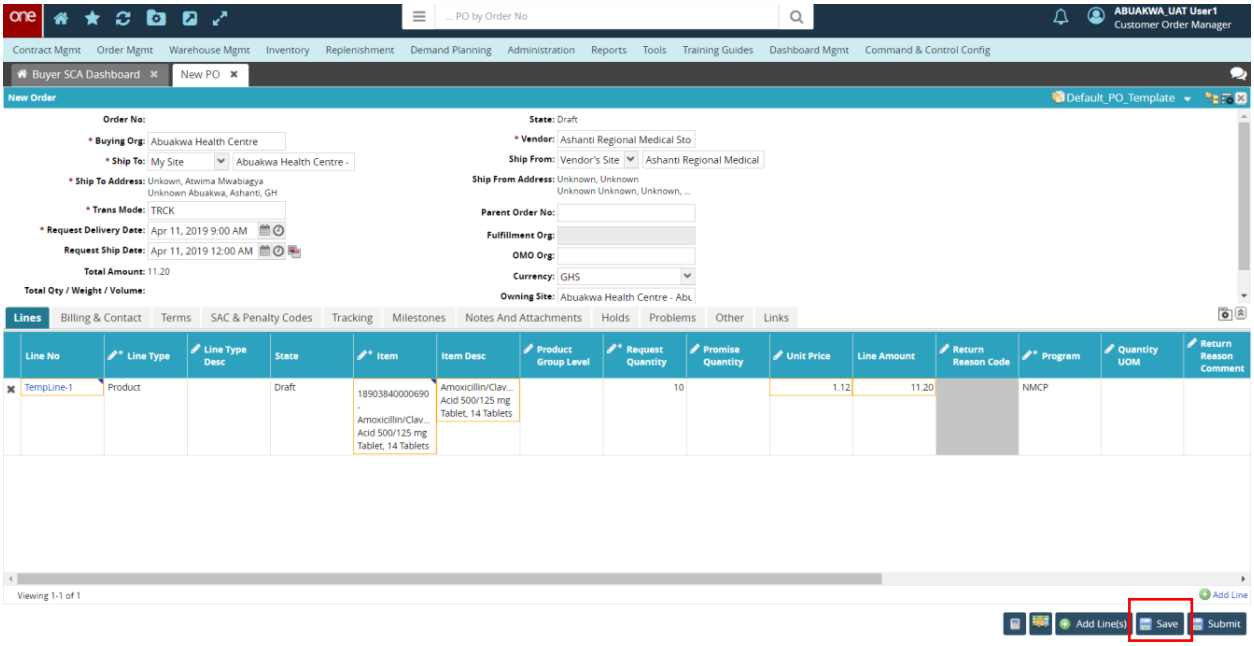
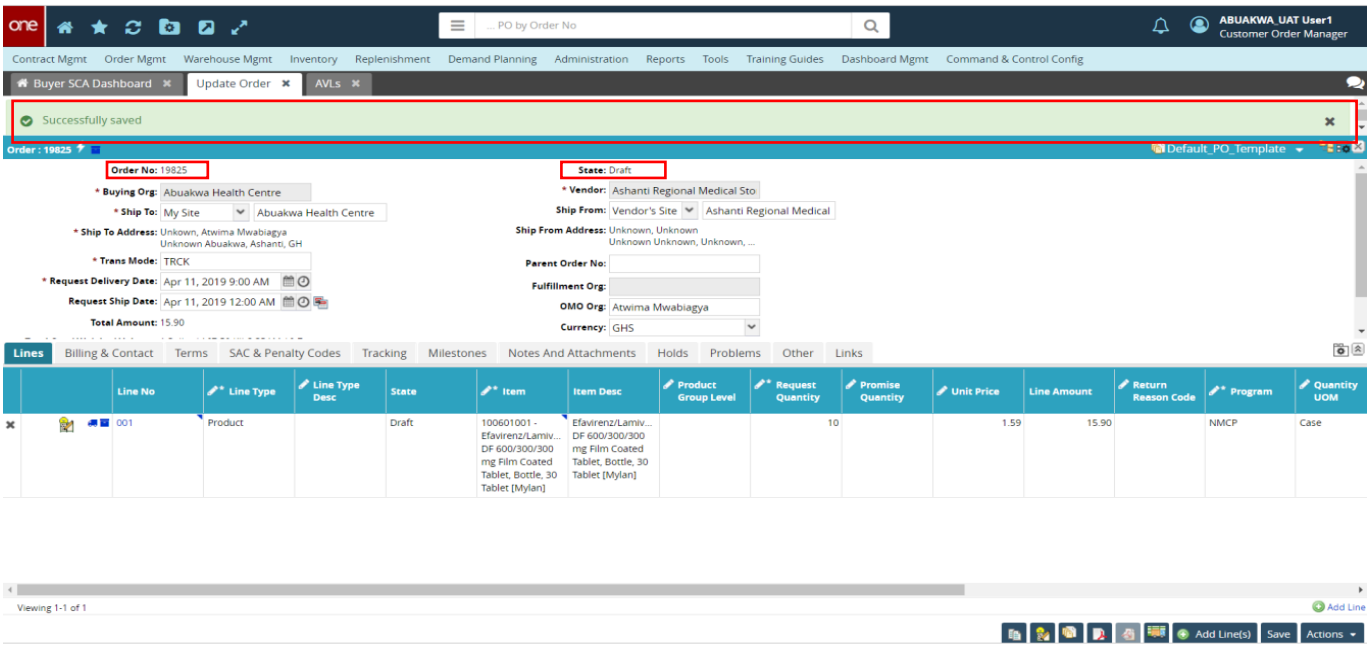
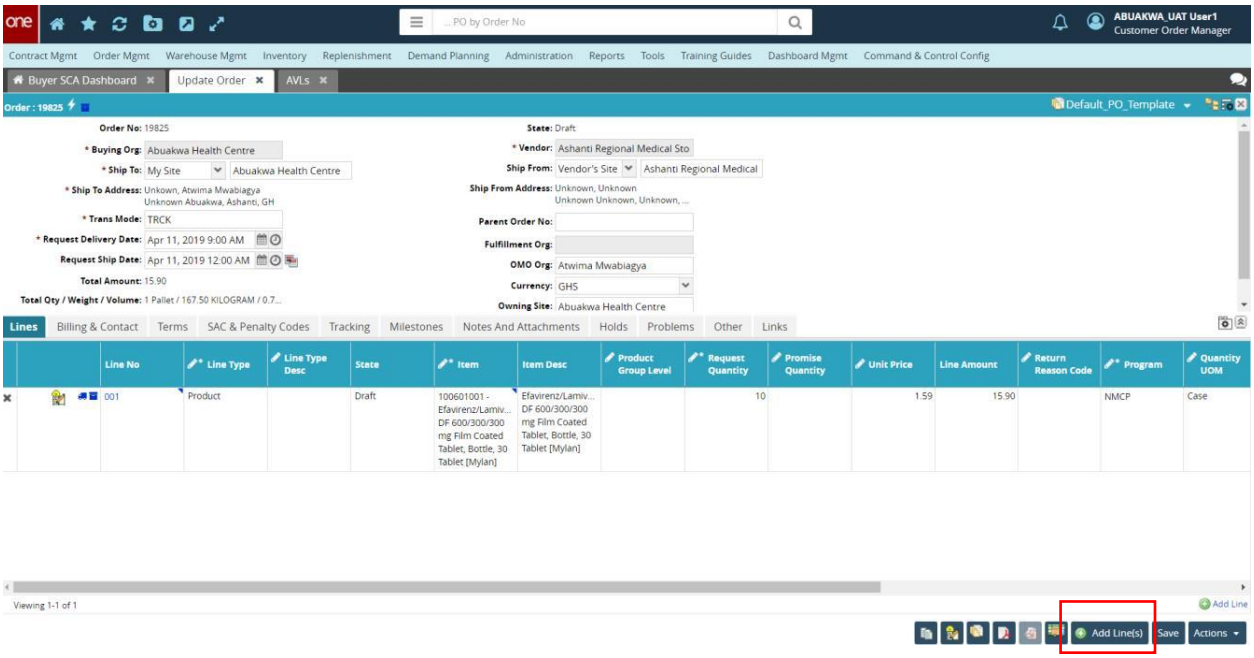


- A "Successfully saved" message will appear on a green band. A new order is created in ***Draft state (Status: Draft)*** with an order number generated

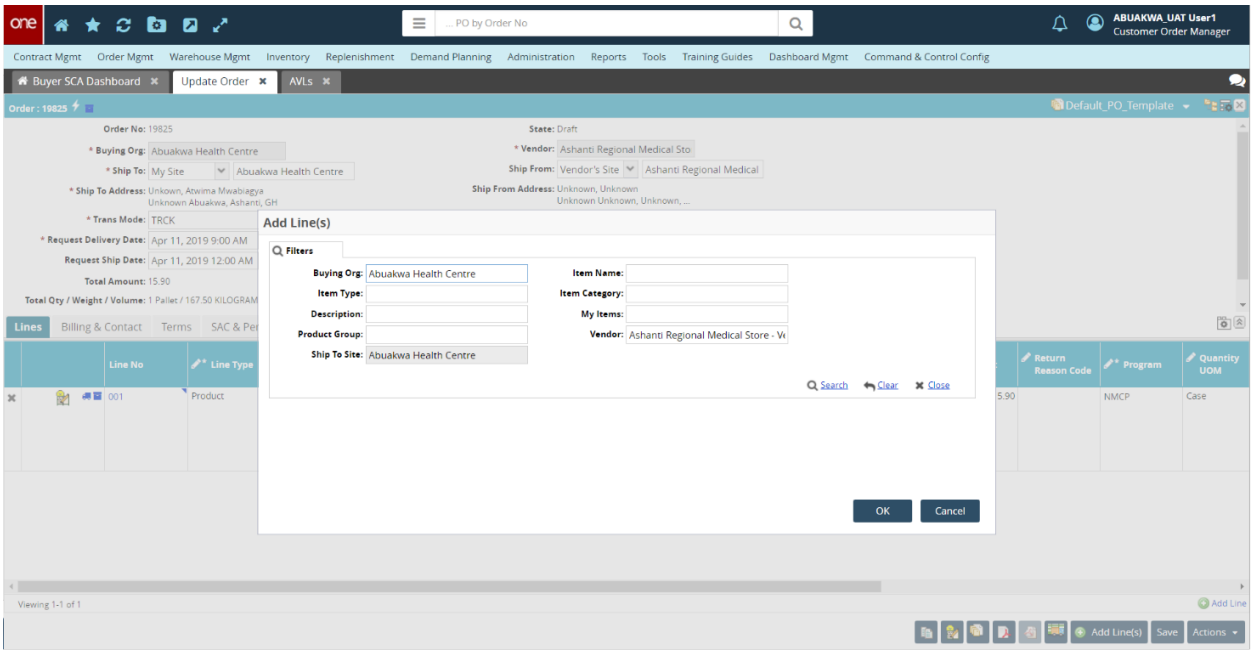


Note: Record or mentally note the ***Order No.*** This will be required to identify this transaction when you go to the next stage of Order Review and Submission.

- In cases where you want to add lines in bulk, on the open order screen click on the ***Add Line(s)*** button at the bottom right of the screen



- A pop-up screen will appear as shown below.



- On the screen, select the ***product group*** to populate the "particular program item" ie. Essential medicine or Family Planning etc. then click ***Search***.
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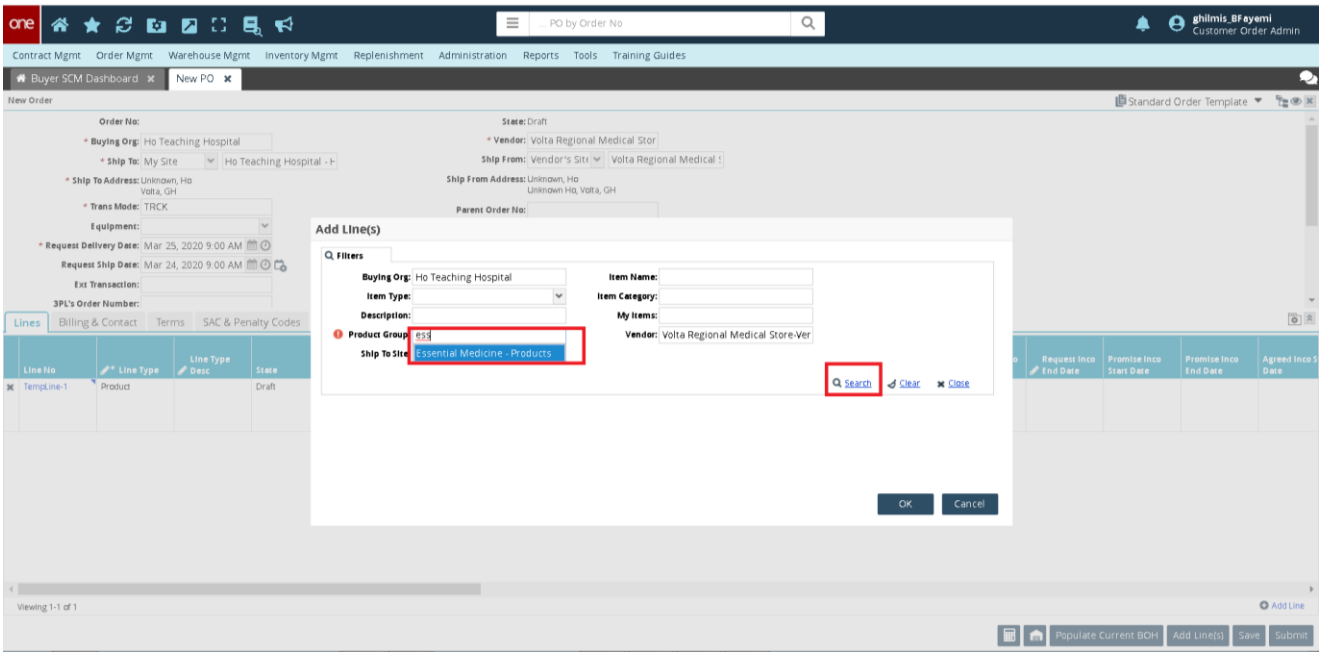
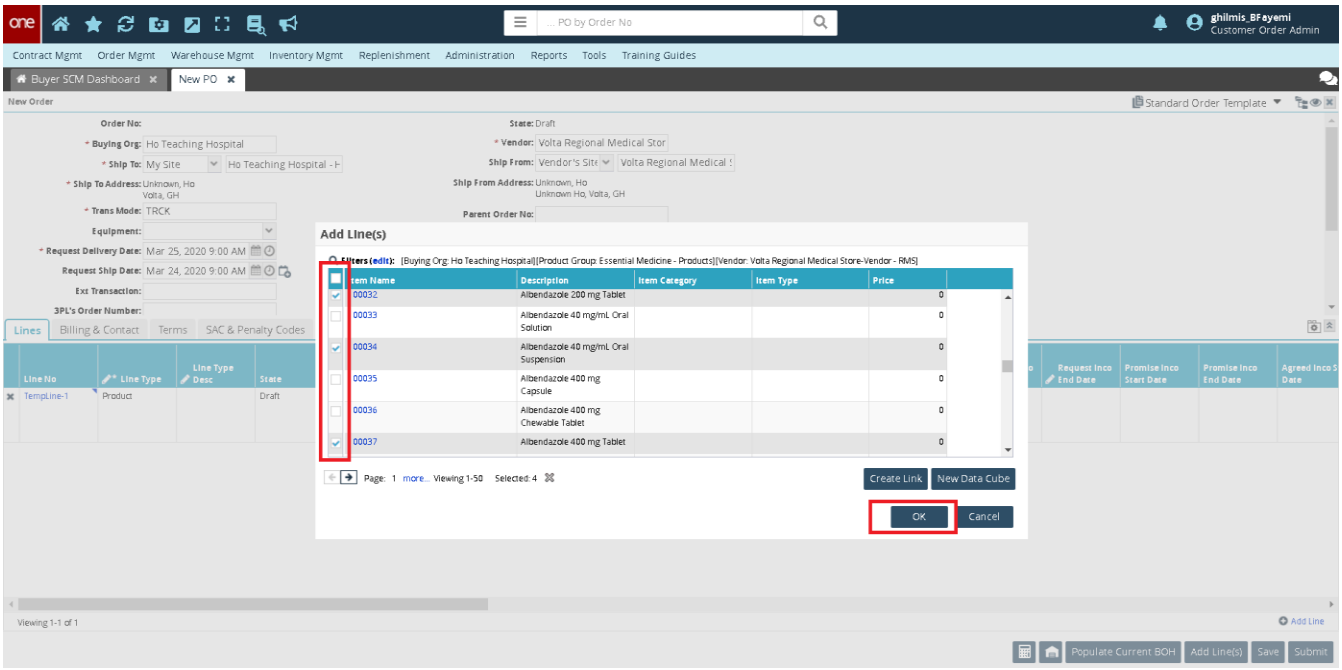


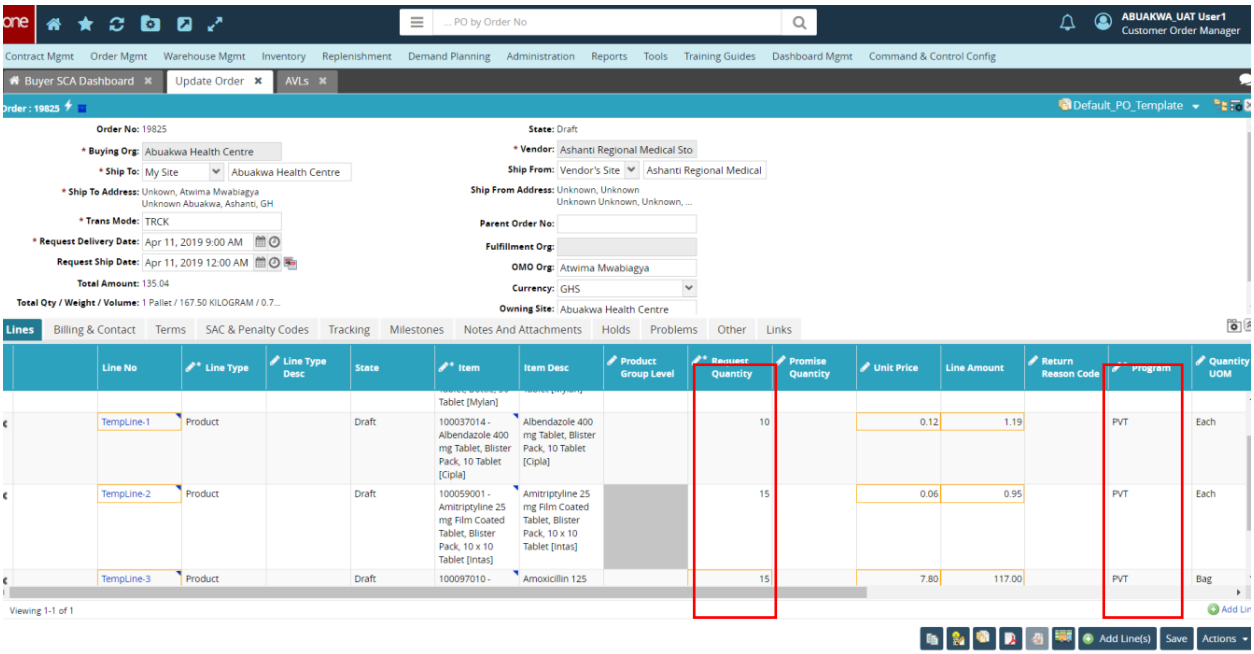
- A list of commodities will appear as per selected filter criteria. On the list, select items by ticking in the box next to the item. To add the lines, click on ***Ok***

The selected item(s) will be added as order lines to the order.

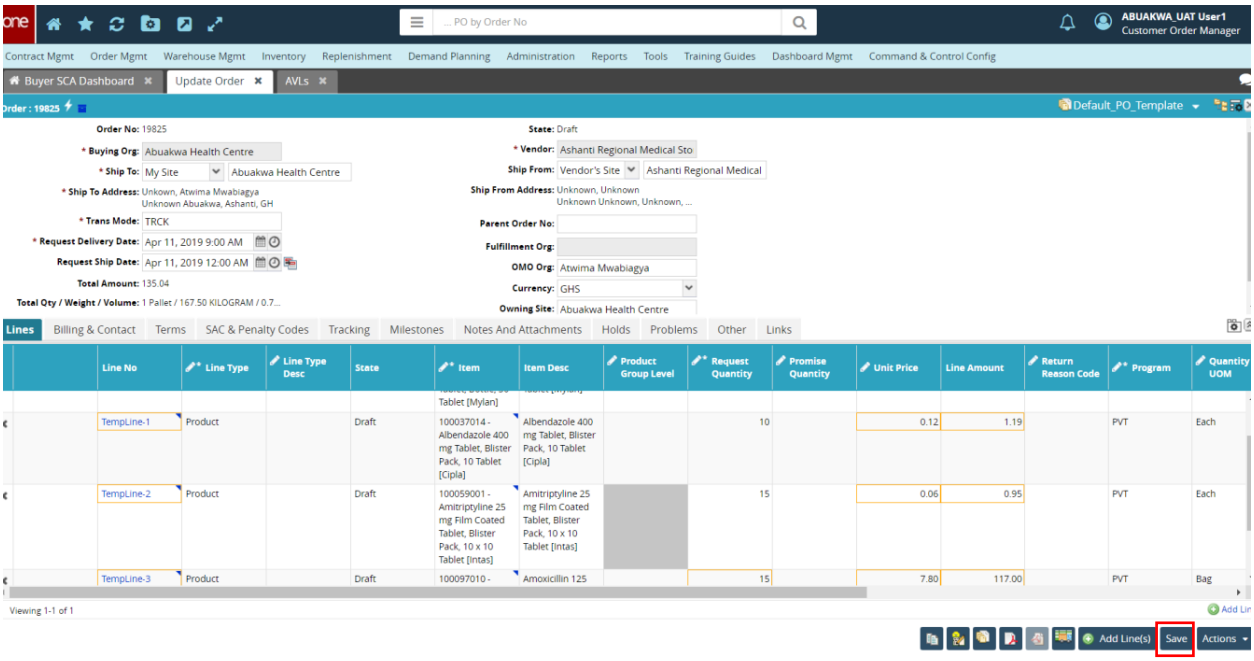


- After lines are added in bulk, ***request quantities*** and ***programs*** for each line must still be added. Add:

- Request Quantity for each line
- Program for each line.

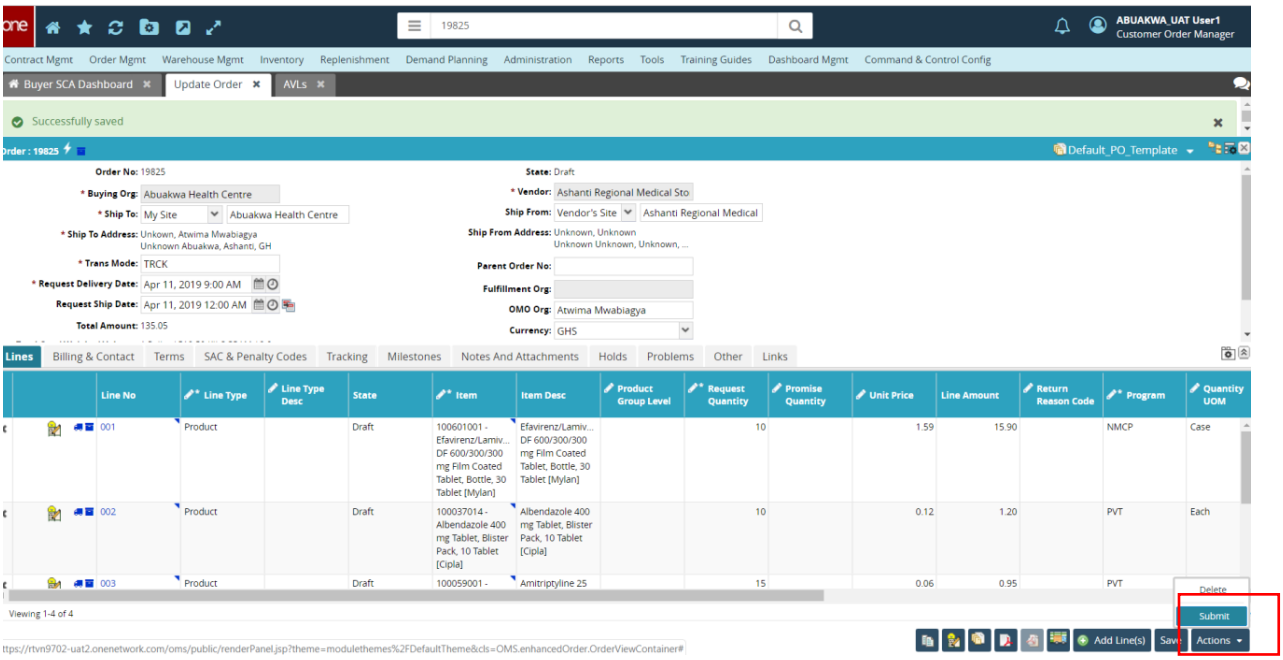


- To save changes, navigate to the bottom right of the screen and click on Save



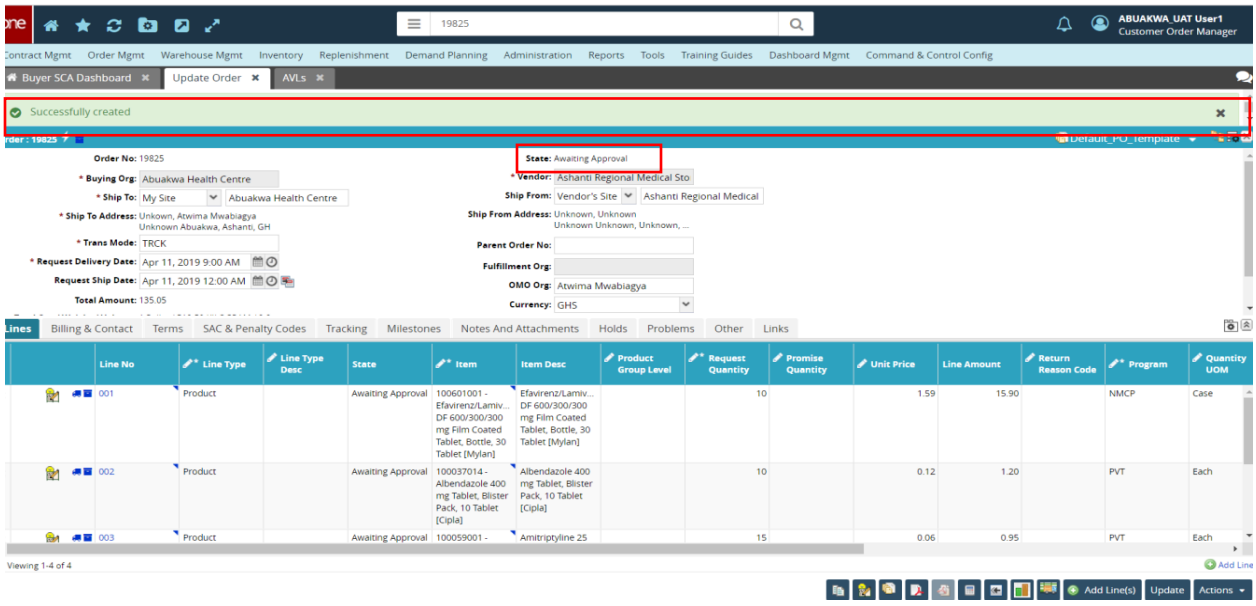
- When all order details have been captured, on the order, save to submit order to the next user for approval.

Submitting order: To submit the order for approval, navigate to Actions on the bottom right corner of the screen and click on ***Submit.***



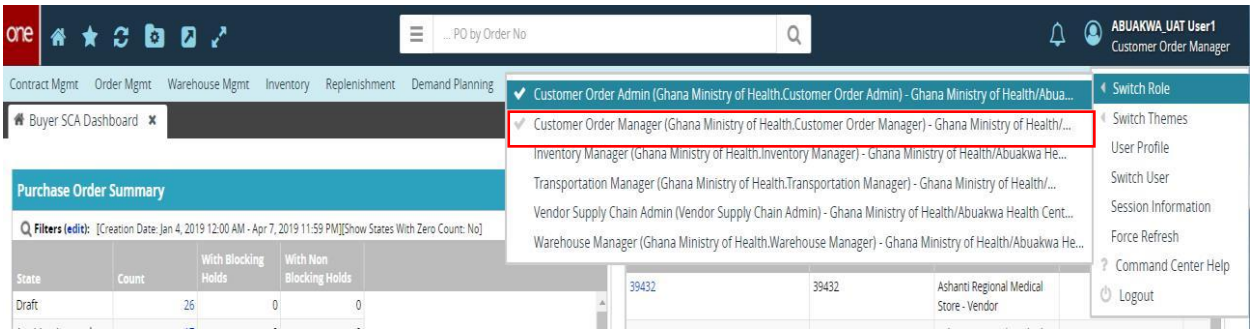
- Once the order has been submitted for approval, a Successfully created message will appear on a green band.

NB: the order status changes from **Draft** to **Awaiting Approval.**



Purchase Order (PO) Review and Submission.

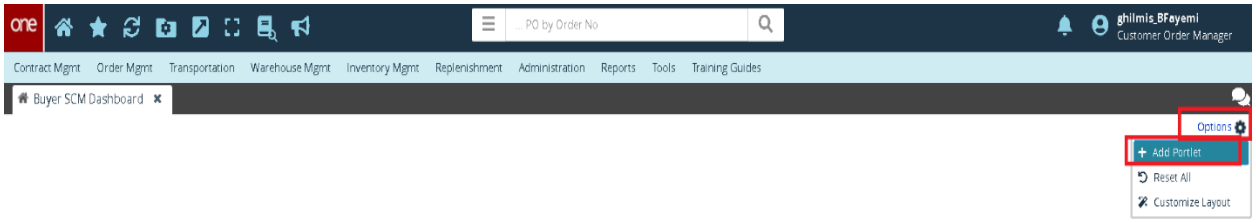
- Log in as a customer order manager at your facility or **DHD**



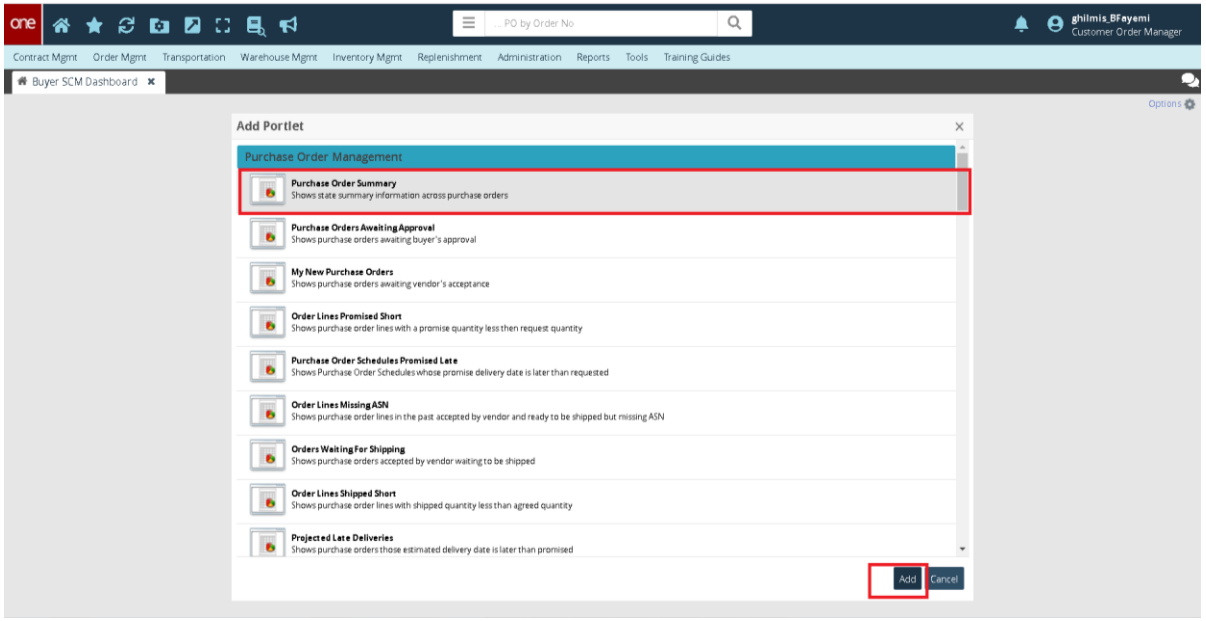
- To review an order for submission, search for the order using the order number
  - There are multiple ways to search for a Purchase Order that requires approval.

a) Searching for Purchase Order via the Portlet

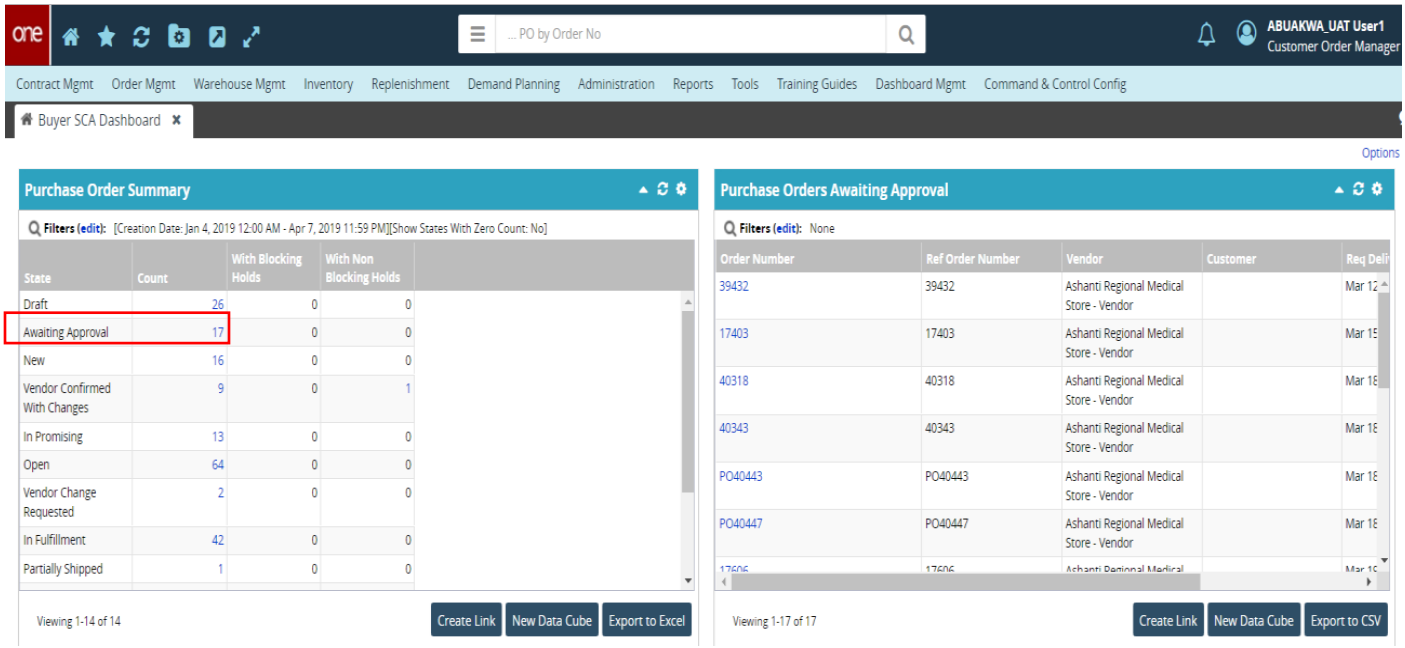
To create a portlet, navigate to options on your dashboard, select ***Add portlet***



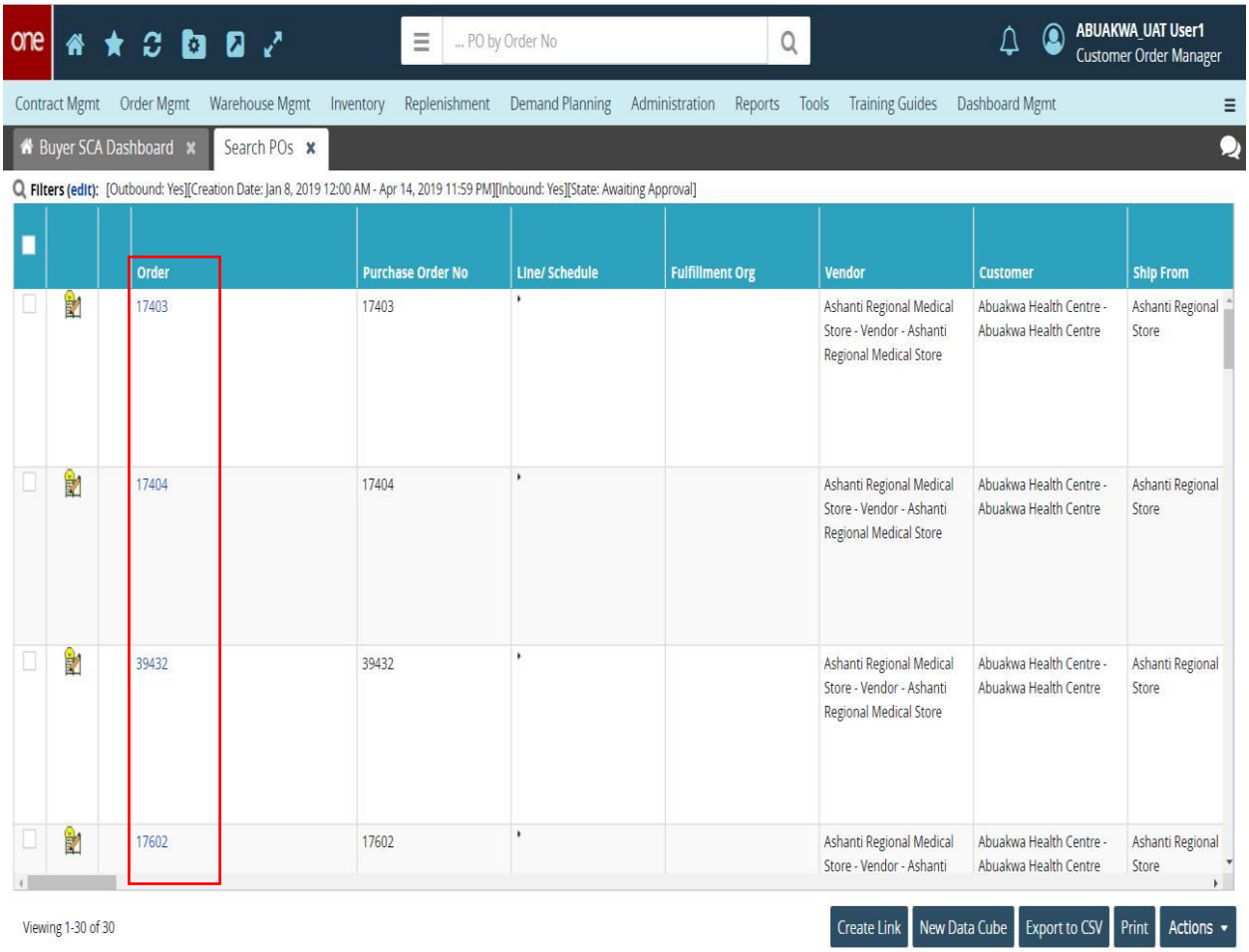
- An add portlet windows opens, select the purchase order summary portlet and click on ***Add***



- On the Purchase Order Summary portlet, click on the number next to the ***Awaiting Approval*** in the count column .

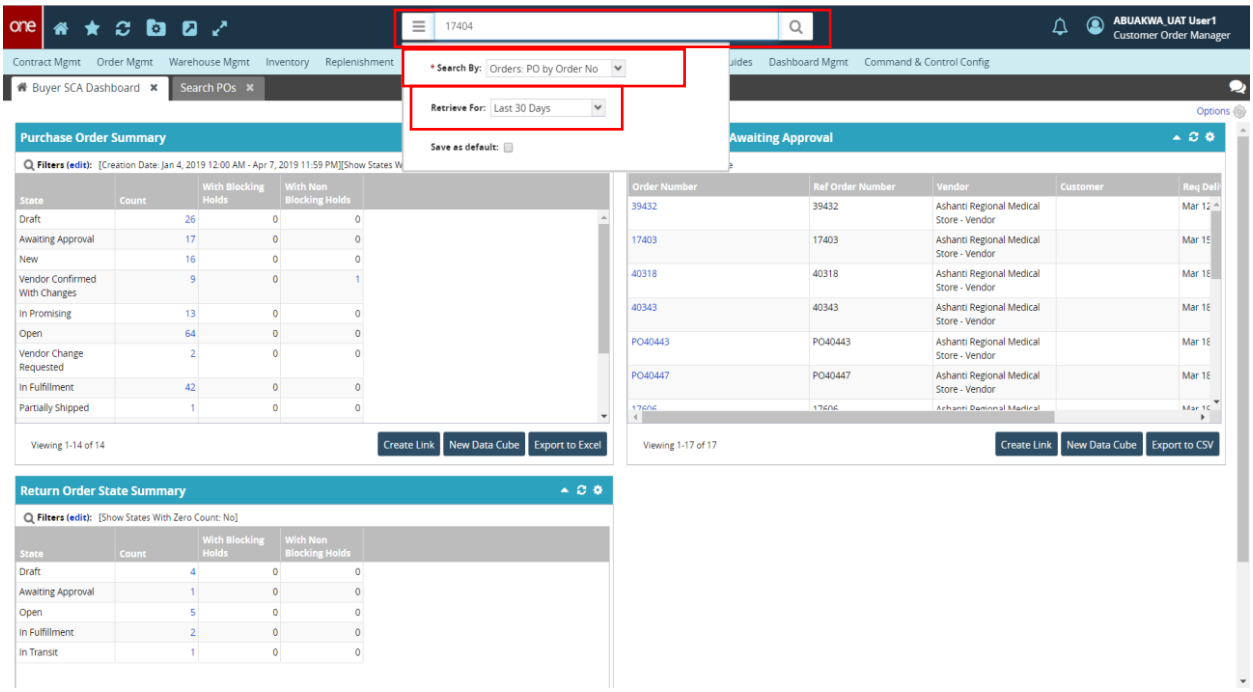


- A list of all orders that are in ***Awaiting Approval State*** will appear.

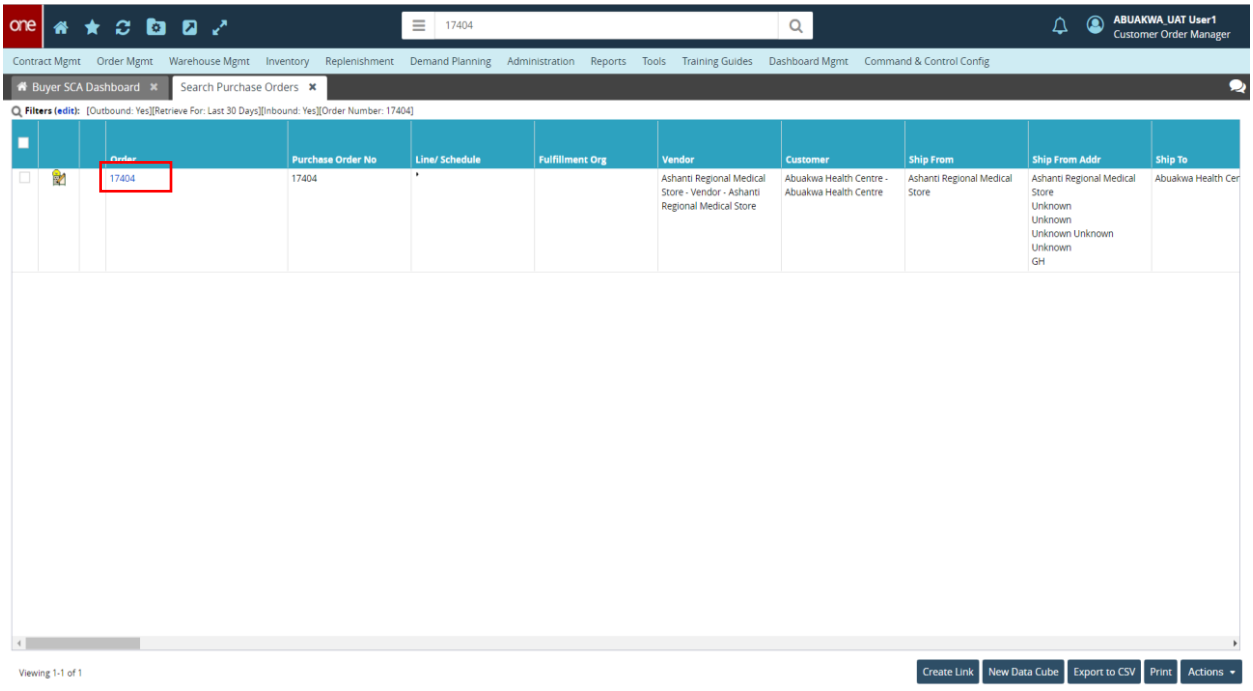


b) Searching for orders using the Search engine.

- In the Search bar, type in the order number that must be approved. Ensure that the Search By filter is selected as "Orders: *PO by Order No*". If not, use the drop down to select the correct filter option. Furthermore, ensure that the order being searched is within the selected Retrieve for period.



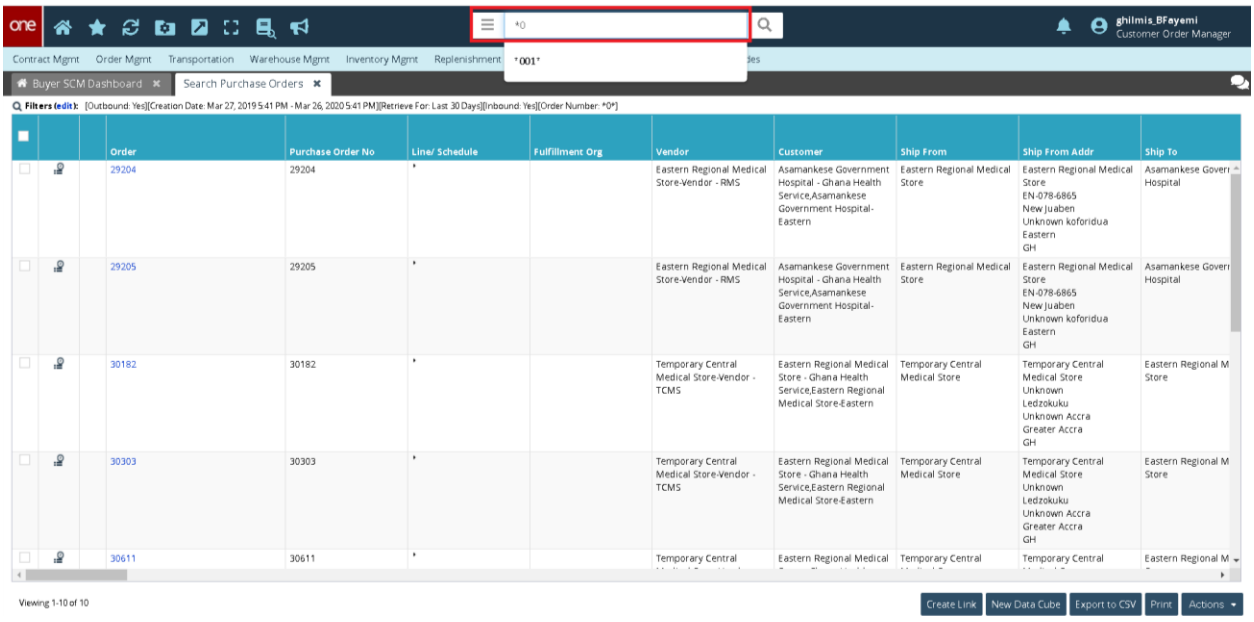
- A search order window will open as below with searched order line.



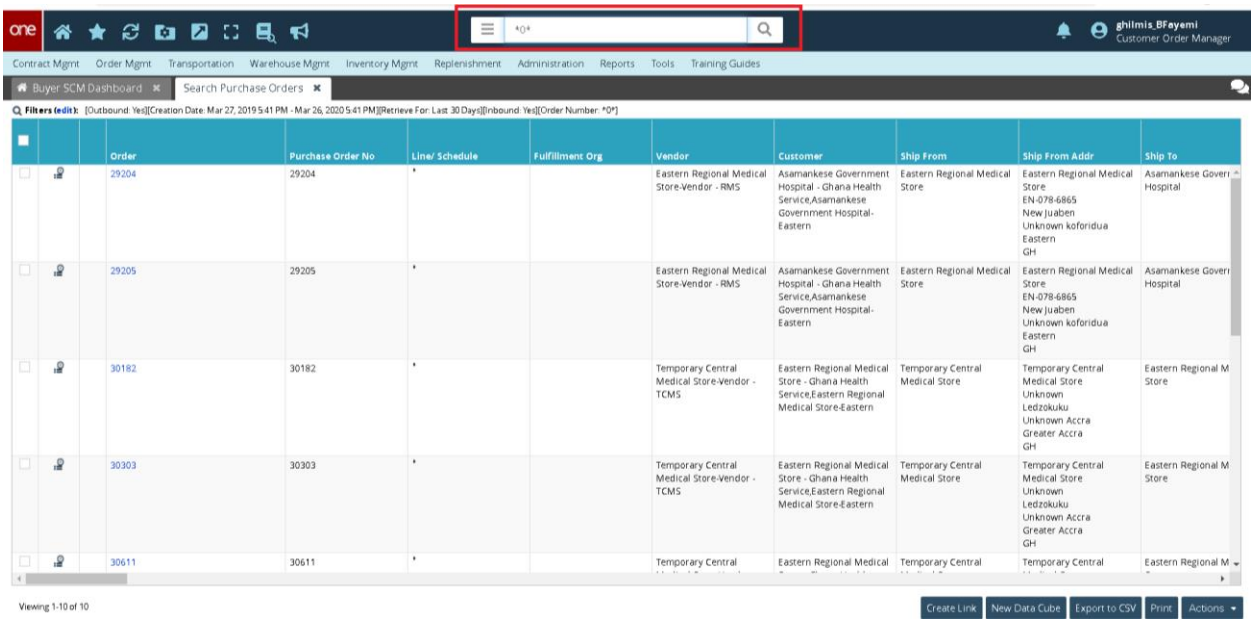
you can add * (known as wild card search) to facilitate your search

for example, if you were searching for an order with number 4572, you can enter 457* if you have forgotten the last digit or *572 if you have forgotten the first digit, you can also enter *57* if you do not remember the first and last digits

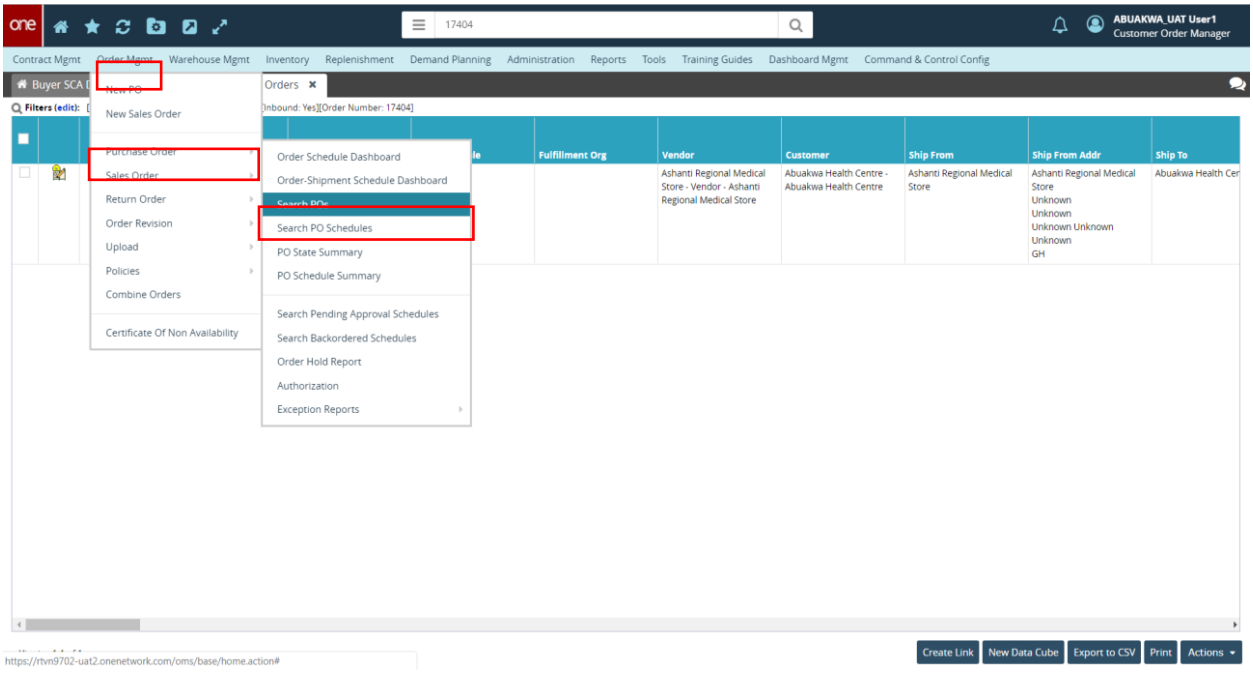
With * at the beginning:



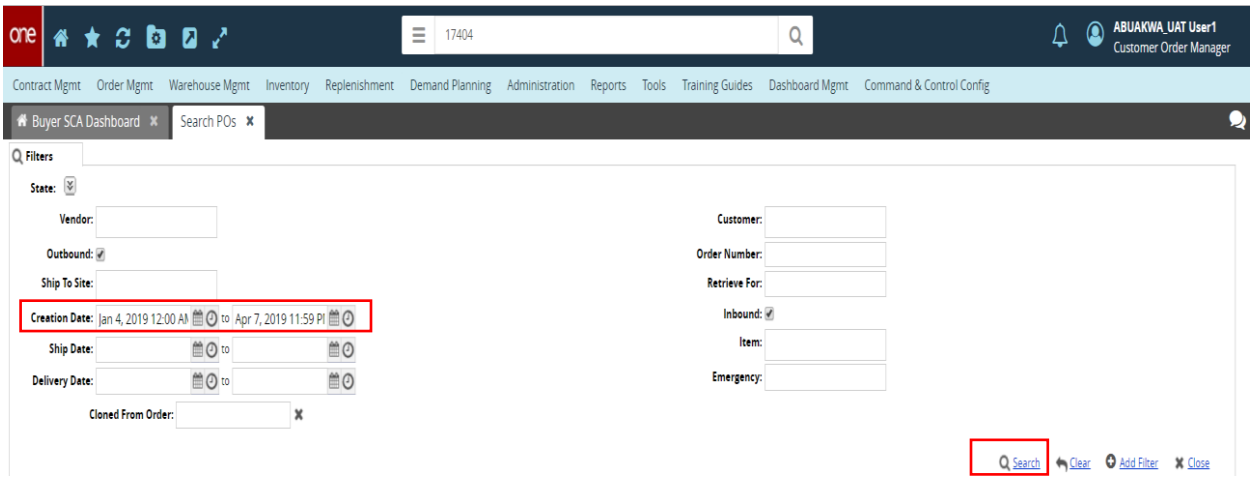
With * at the end



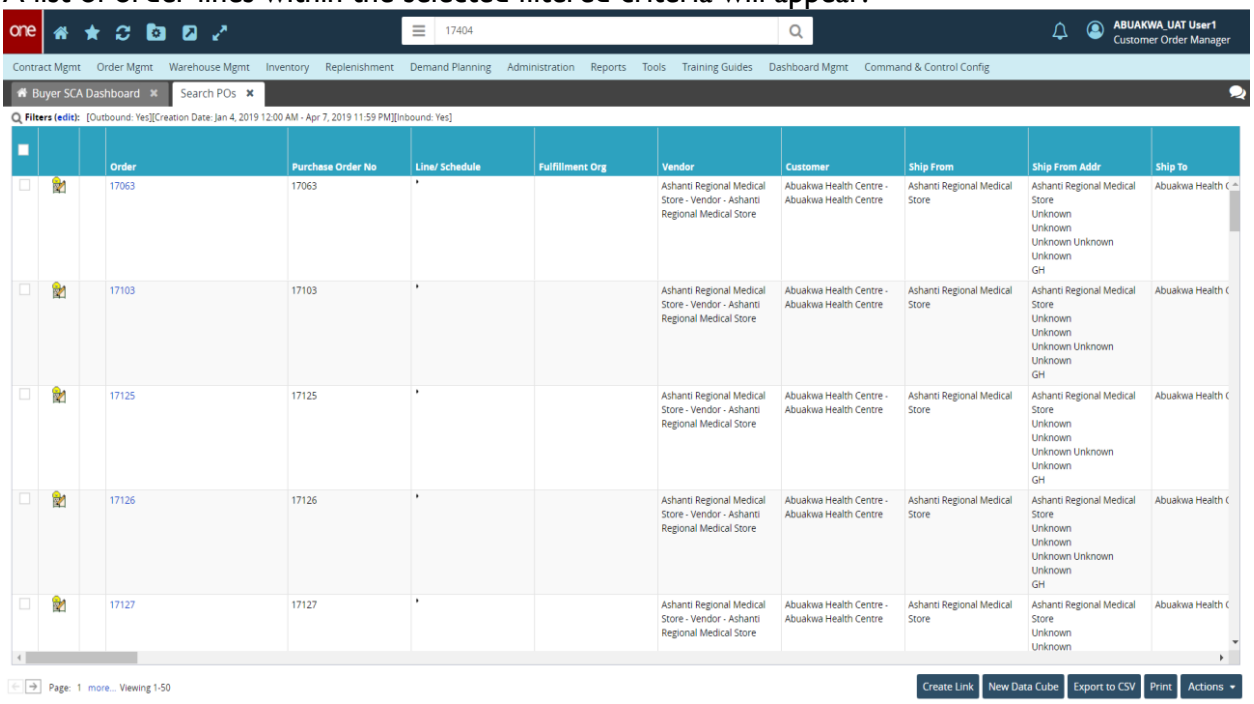
c) The last alternative is to select Order Management then select Purchase Order and click on Search PO.



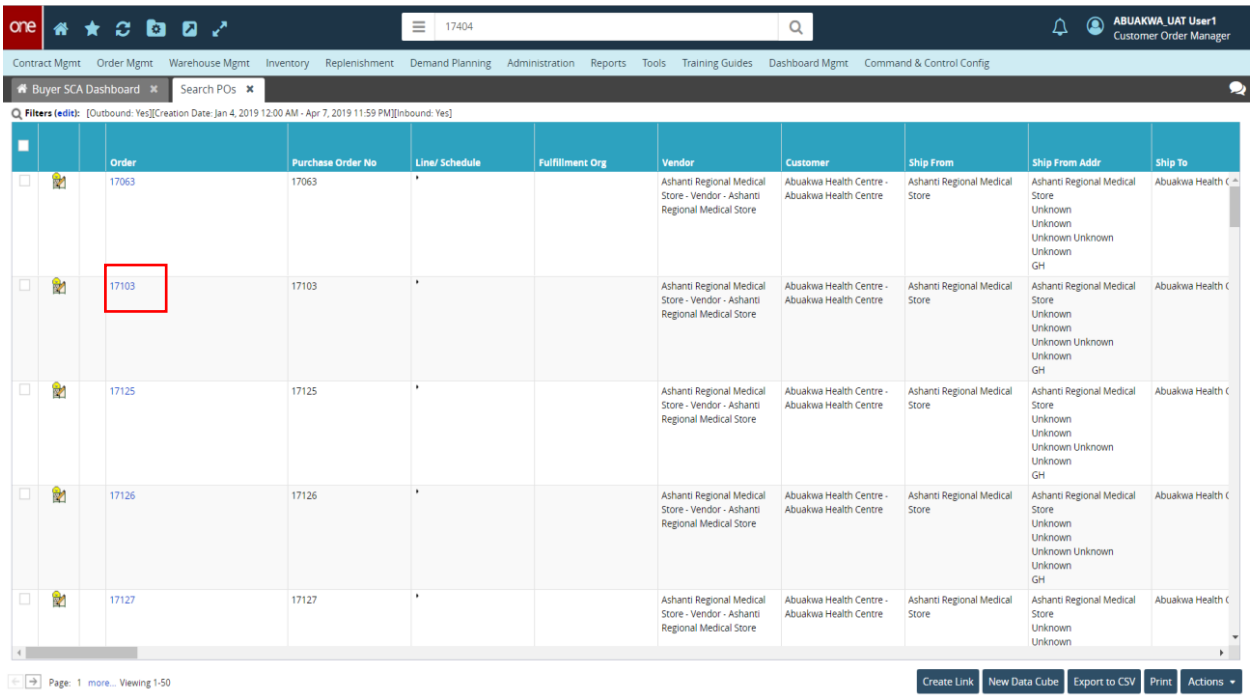
A Search PO window will open. Any of the fields can be used to filter for the purchase order we want to search. Populate any of the fields and click on Search.



A list of order lines within the selected filtered criteria will appear.



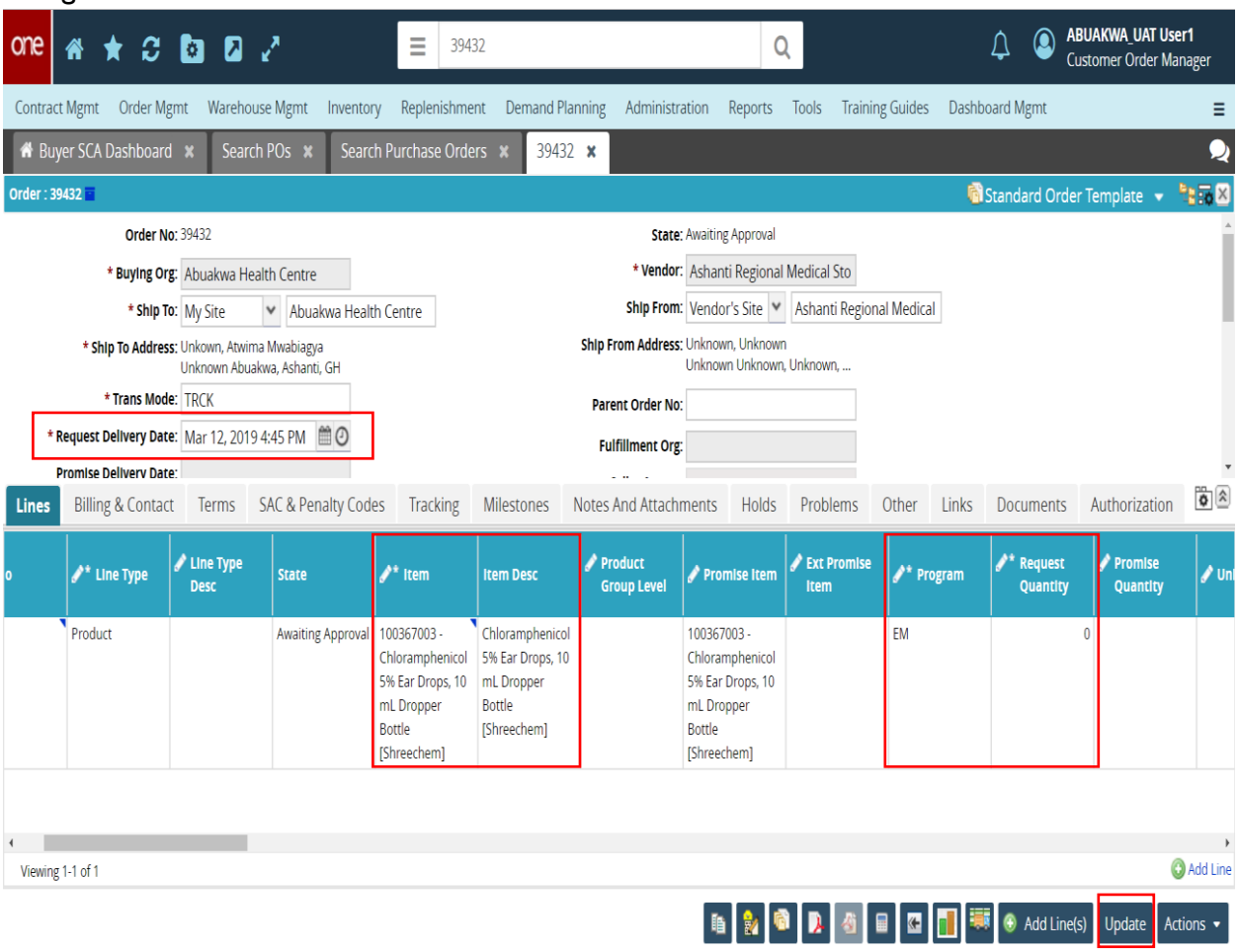
To review an order for completeness, submission and approval, click on the order number that you want to review and submit from the list of retrieved orders after the search



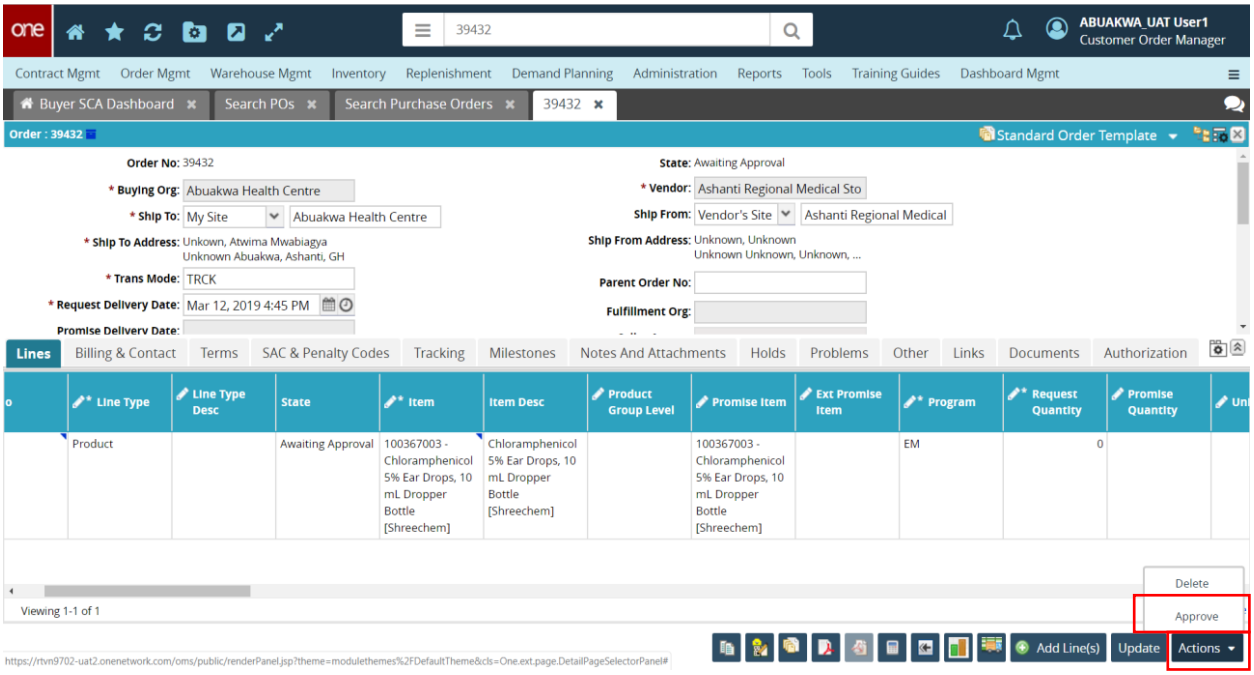
Review the following:

- Item
- Request Quantity
- Program

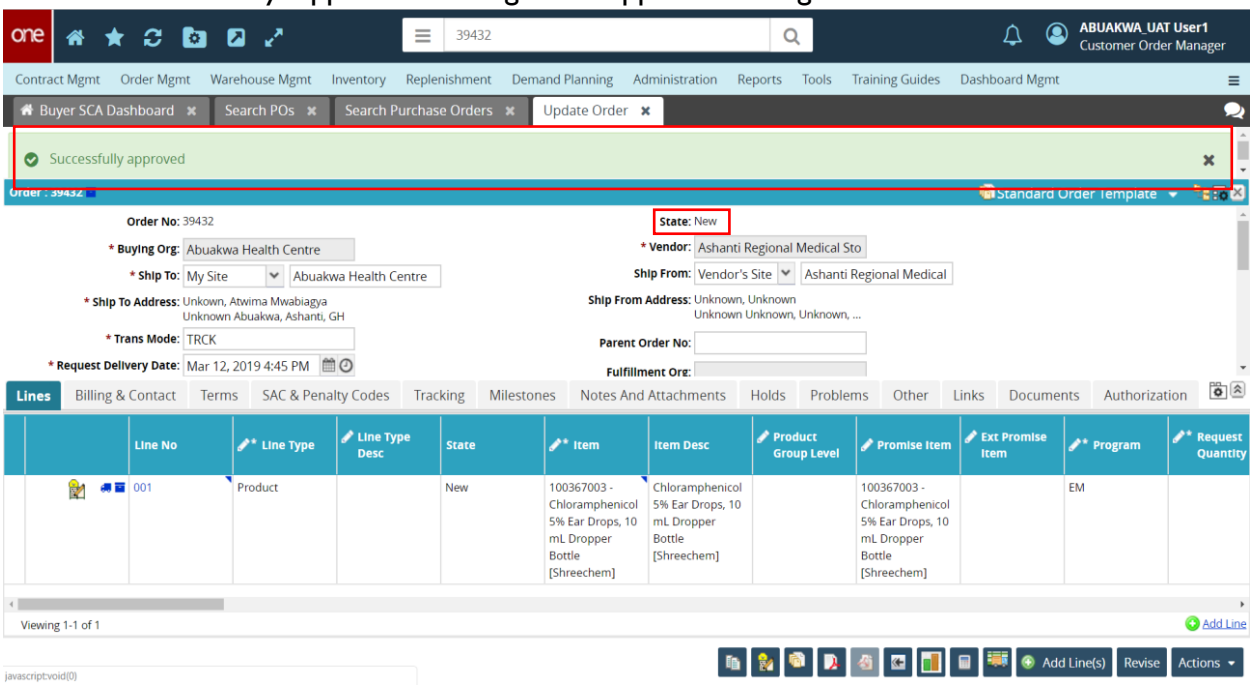
If changes are made on the relevant fields on the order, click the ***update*** button to save the changes.



- To approve the order, navigate to the bottom right corner of the screen and select ***Actions*** then click ***Approve***



- The order state will change from ***Awaiting Approval*** to ***New***.
- A Successfully Approved messages will appear on the green band.



NB: The order has been submitted to the Supplier and the Supplier is now able to action the order.

System Roles and Responsibilities (Health Centre)

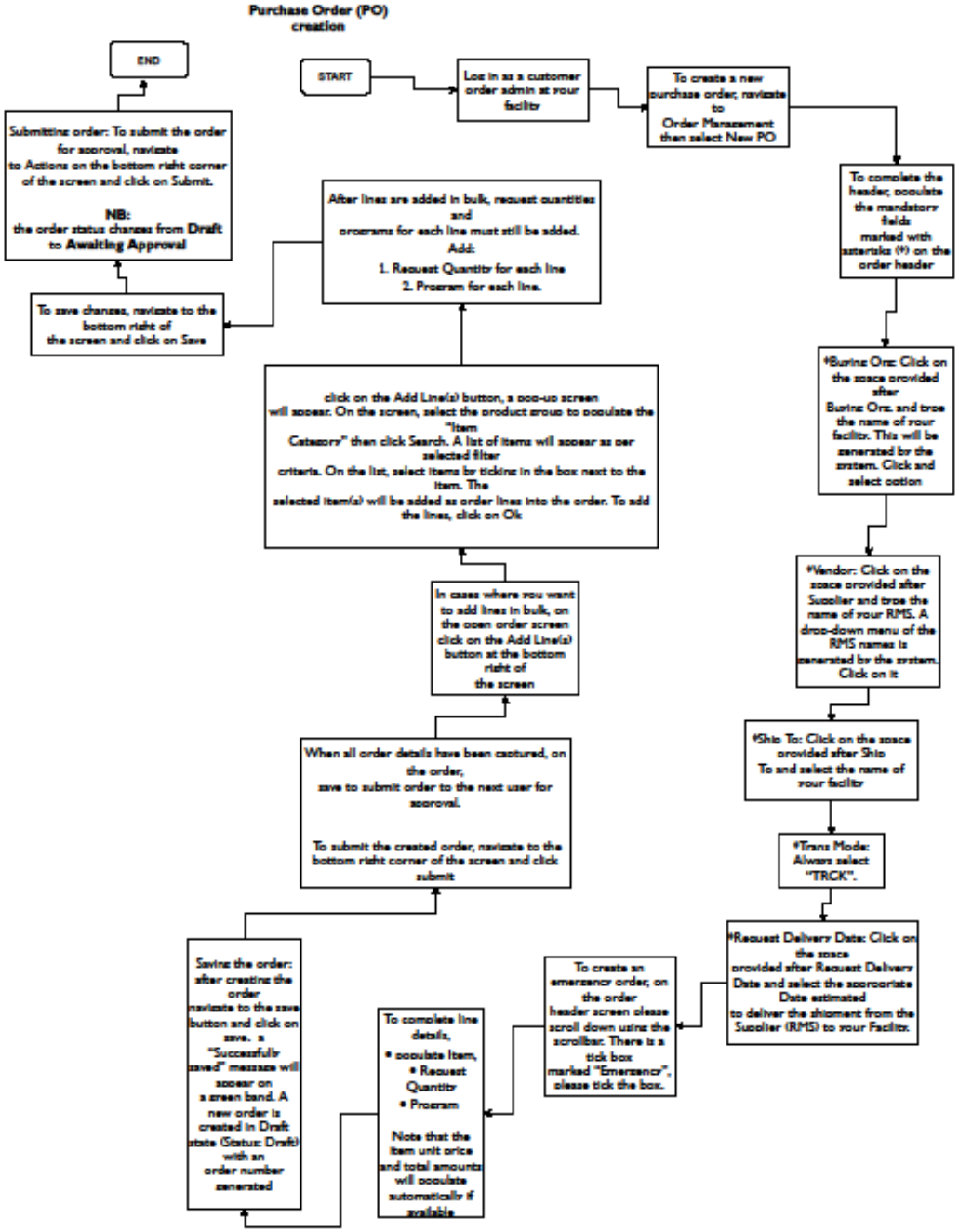
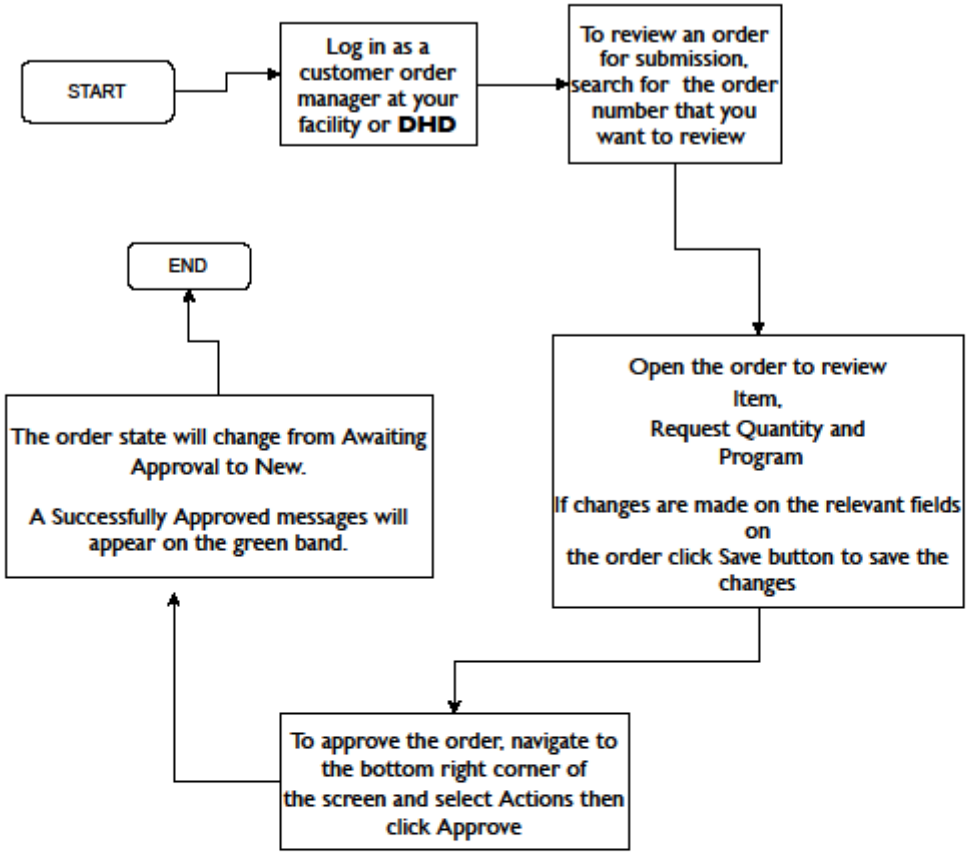
Below is a list of key personnel and their key responsibilities.

Org	Personnel	Roles and Responsibilities
SDP	Customer Order Admin	• The officer at the Health facility that is ordering stock from the next higher-level facility such as Regional Medical Store
SDP	Customer order manager	• The manager reviews the order that has been prepared by the customer order admin at the facility and approves the order which is submitted to the Regional Medical Stores to action the order.

System Roles and Responsibilities (CHPS)

Below is a list of key personnel and their key responsibilities.

Org	Personnel	Roles and Responsibilities
SDP	Customer Order Admin	• The officer at the CHPs that is ordering stock from the next higher-level facility such as Regional Medical Store
DHD	Customer order manager	• The officer at the Directorate responsible for approving and submitting PO to the next higher-level facility such as Regional Medical Store


Purchase Order (PO) creation
START
Log in as a customer order admin at your facility
To create a new purchase order, navigate to Order Management then select New PO
To complete the header, populate the mandatory fields marked with asterisks (*) on the order header
*Buying Org: Click on the space provided after Buying Org. and type the name of your facility. This will be generated by the system. Click and select option
*Vendor: Click on the space provided after Supplier and type the name of your RMS. A drop-down menu of the RMS names is generated by the system. Click on it
*Ship To: Click on the space provided after Ship To and select the name of your facility
*Trans Mode: Always select "TRCK".
*Request Delivery Date: Click on the space provided after Request Delivery Date and select the appropriate Date estimated to deliver the shipment from the Supplier (RMS) to your Facility.
To create an emergency order, on the order header screen please scroll down using the scrollbar. There is a tick box marked "Emergency", please tick the box.
To complete line details,
• populate Item,
• Request Quantity
• Program
Note that the Item unit price and total amounts will populate automatically if available
Saving the order: after creating the order navigate to the save button and click on save. a "Successfully saved" message will appear on a green band. A new order is created in Draft state (Status: Draft) with an order number generated
When all order details have been captured, on the order, save to submit order to the next user for approval.
To submit the created order, navigate to the bottom right corner of the screen and click submit
In cases where you want to add lines in bulk, on the open order screen click on the Add Line(s) button at the bottom right of the screen
click on the Add Line(s) button, a pop-up screen will appear. On the screen, select the product group to populate the "Item Category" then click Search. A list of items will appear as per selected filter criteria. On the list, select items by ticking in the box next to the item. The selected item(s) will be added as order lines into the order. To add the lines, click on Ok
After lines are added in bulk, request quantities and programs for each line must still be added. Add:
1. Request Quantity for each line
2. Program for each line.
To save changes, navigate to the bottom right of the screen and click on Save
Submitting order: To submit the order for approval, navigate to Actions on the bottom right corner of the screen and click on Submit.
NB:
the order status changes from Draft to Awaiting Approval
END

Purchase Order (PO) Review and Submission