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Set up SOS on the workstation

1. Install SOS into "C:\SOS" as described in the "SOS Installation Instructions" document available on our website at www.ch2.net.au
2. Open SOS and enter your login id as described in the "SOS Installation Instructions" document (click "Setup", "Connect").
3. Login to SOS by clicking "Online", "Connect to CH2" from the menu bar and enter your supplied password. Login id's and passwords are supplied by CH2 upon request.
4. Log out of SOS by selecting "Online", "Disconnect from CH2".

5. Select "Setup", "Ordering" from the menu bar and click the check boxes next to "Send Order Files" and "Create Acknowledgements". The "Order Processing Parameters" screen is shown below.

6. The "Order Process Parameters" and "Acknowledgement Parameters" fields should have the SOS folder highlighted as shown below.

7. Detailed explanations of the various options available in this screen are covered in the documents "SOS File Transfer Instructions" and "SOS Special Profile Settings" available from our website or by request.

8. SOS is now ready to process orders from iPharmacy.

Order Processing Parameters

Account: 567203 THEATRE

Default Special Instructions: [Empty]

Enter Product Comments
 Send Order Files

Confirm Order Creation
 Create Order Acknowledgements

Order Process Parameters

File Format: ANSI-X12

File Filter: x*.*

File Directory: c: (C:\SOS selected)

Allow Manual Additions
 Automatic Processing
Price Difference Warning %: 10

Automatic Price Check
 Automatic Stock Check

Accept Backorders

Acknowledgement Parameters

File Format: ANSI-X12

File Filter: a*.*

File Directory: c: (C:\SOS selected)

For EDI Orders Only
 Invoice Acknowledgements
 Advanced Shipping Notices

Invoice/ASN Checks: Once Daily Every Login

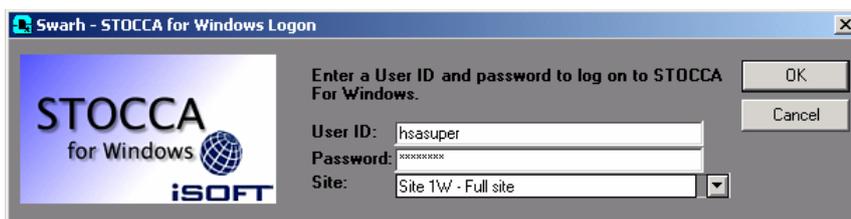
GLN Number: [Empty]

Save Cancel

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Create a new supplier for electronic ordering in iPharmacy.

1. Start iPharmacy from the icon and log in.

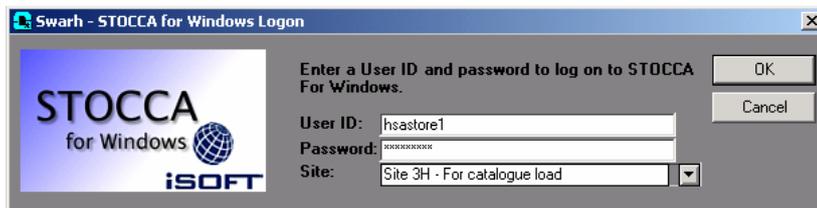


2. Choose Maintenance / Inventory / Supplier from the menus.
3. Click the [New] icon to create a new supplier and enter mandatory details, including a free text Supplier name. Alternatively you can use the current CH2 account. Ensure that your CH2 account number is entered in the "Account with Supplier" field.

4. The "Send Process" option should be set to "Electronic Data Interchange".
5. Click the "EDI" Tab.
6. "EDI Method Code" should be "HSA SOS".
7. "EDI to File Location" and "EDI from File Location" should both be "c:\sos" (or the folder where SOS is installed).
8. "EDI Access Type" should be "Executable Application".
9. "EDI Access Path" should be "c:\sos\sos.exe" (or the folder where SOS is installed).
10. [Save] the new supplier details.

Import an electronic supplier catalogue

1. Login to iPharmacy.



2. A file named 'cat.txt' is emailed to clients by CH2. The hospital is responsible for copying it to the path determined in the "STOCCA.ini" file.
3. Make sure that the cat.txt file exists in the folder to which iPharmacy is installed before continuing.
4. Choose Maintenance / Inventory / Electronic Catalogue from the menus.
5. Select the CH2 supplier from the drop down list.
6. Select the [Import] button. The full set of data from the catalogue should appear in the list.
7. [Save] – This may take a minute or two, then close the window.

Note: At a new site, no iPharmacy products will have been linked to this catalogue. Check this by choosing Maintenance / Inventory / Supplier Catalog from the menus. Try a [Retrieve] of linked products, then unlinked products.

Check to see how these catalogue items appear in iPharmacy

1. Choose Maintenance / Inventory / Supplier Catalog from the menus.
2. Select CH2 from the supplier drop down list.
3. Try a [Retrieve] of linked products, then unlinked products.
4. Put "Zyrtec" in Supplier's product description and unlinked, then [Retrieve] You will see a few there including "ZYRTEC TAB 10MG 10"

Link a product through supplier catalogue maintenance.

You can try and link an item to a iPharmacy product by selecting (double-clicking) it from the list of unlinked products and completing the next window.

[Save] it after entering all of the mandatory information. Once saved, it is LINKED and would not show up in an "unlinked" search.

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Create an electronic order to CH2 – linked products

1. Select Inventory / Order from the menus
2. [New]
3. Choose CH2 as the supplier, and Main Pharmacy store.
4. [Product] button to add a product to the order. *Hint ... you might like to have the CH2 linked products retrieved in another window, so you know which ones to select.*
5. Add two products to the order using this mechanism.
6. You could [Save] this order without actually ordering it at this point. It stays 'In process' until you [Order] it.
7. Select the [Order] button and authorise it with a valid User ID and password.
8. Note the order number in the top LH corner. You will need this to identify that order in the next task.
9. This order has NOT been sent anywhere yet. It is just queued up ready to be sent via the EDI to supplier process.

Sending Orders from iPharmacy to SOS (EDI to supplier)

This process creates the electronic order and saves the resulting file on the hard disk. Once created, SOS is invoked and transfers the file to CH2.

An acknowledgment file is created, transmitted back to the PC and saved on the hard disk.

1. Select Inventory / EDI to supplier from the menus.
2. Choose HSA SOS as the EDI format.
3. [Retrieve] the queued one/s. Your order number should be there, perhaps with some others which are yet to go.
4. You can choose just one, or [CTRL] + click or [SHIFT] + click to multi-select.
5. Once you have the order highlighted, [Generate]
6. This creates an order file in the C:\SOS folder (as identified in the supplier maintenance window)
7. Click [Connect] and iPharmacy will open the SOS application.
8. Connect to SOS. The order will now be processed in SOS.

Retrieving order information from SOS (EDI from supplier)

This process interrogates the returned Purchase Order Acknowledgement file. Price changes are recorded in both the order and supplier catalogue.

1. Select Inventory / EDI from supplier from the menus.
2. Choose HSA SOS as the EDI method
3. [Import] to bring the information for the text file into the list area of this window.
4. Remove, or add any items you wish.
5. [Update] to update the order. The status becomes 'Outstanding', as it is yet to be received.
 - The Variation Area tab will display any variations between the information ordered, and the details received back in the POA
 - The Error tab will display any anomalies with the structure of the POA file
6. If you now retrieve this order from the Inventory / Order area, you will see it is ready to be received.