

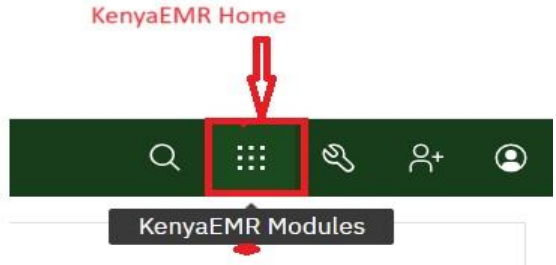
SOP: Inventory Stock Setup Operations Guide

(Last update: March 2024)

TASK:	Stock Setup Operations
OBJECTIVE:	Effective setup of Stock operations
WHO:	Facility System Admin, Partner supporting site HIS staff
REQUIRED MATERIALS:	Functional KenyaEMR

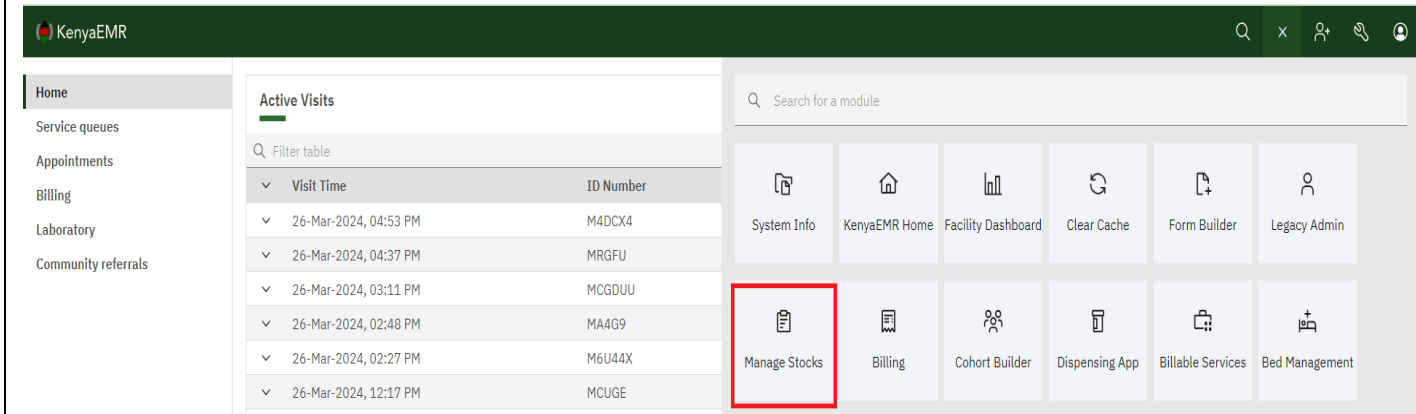
SECTION 1: Assigning stock user Roles

Permissions Assignment: Assign specific permissions to each role based on the tasks they need to perform. These permissions typically include actions like creating, editing, deleting, and viewing certain types of content or data.

<p>Navigate to KenyaEMR Modules On Click you should see the modules.</p>	
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Opening Stock management panel

Navigate to Patient Home. On click, it should take you to Legacy home

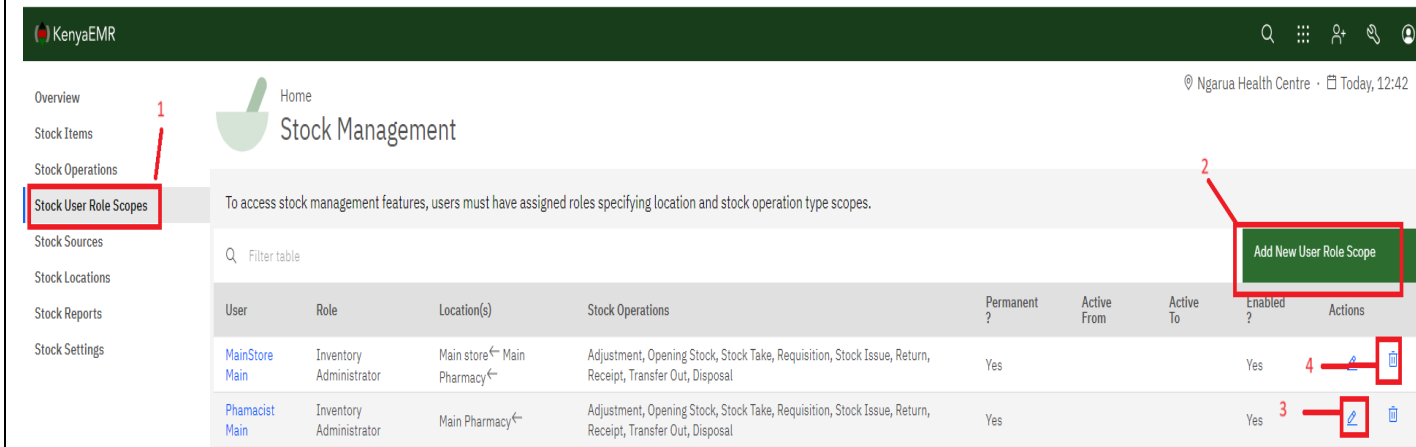


The screenshot shows the KenyaEMR Home dashboard. On the left is a navigation menu with 'Home' selected. The main content area is titled 'Active Visits' and contains a table of recent visits. On the right is a grid of application tiles. The 'Manage Stocks' tile is highlighted with a red box.





Visit Time	ID Number
26-Mar-2024, 04:53 PM	M4DCX4
26-Mar-2024, 04:37 PM	MRGFU
26-Mar-2024, 03:11 PM	MCGDUU
26-Mar-2024, 02:48 PM	MA4G9
26-Mar-2024, 02:27 PM	M6U44X
26-Mar-2024, 12:17 PM	MCUGE

Stock Management Home

1. Click on stock user Role Scopes to issue roles to a user.
2. Click on Add New User Role Scope to add a new user.
3. For an existing user click on the edit button to edit the roles.
4. To remove a user from accessing the stock operation functionality, click on the remove button.



The screenshot shows the KenyaEMR Stock Management Home page. The left navigation menu has 'Stock User Role Scopes' highlighted with a red box and a red number '1'. The main content area has a green 'Add New User Role Scope' button highlighted with a red box and a red number '2'. Below is a table of user role scopes.

User	Role	Location(s)	Stock Operations	Permanent ?	Active From	Active To	Enabled ?	Actions
MainStore Main	Inventory Administrator	Main store ← Main Pharmacy ←	Adjustment, Opening Stock, Stock Take, Requisition, Stock Issue, Return, Receipt, Transfer Out, Disposal	Yes			Yes	4  
Pharmacist Main	Inventory Administrator	Main Pharmacy ←	Adjustment, Opening Stock, Stock Take, Requisition, Stock Issue, Return, Receipt, Transfer Out, Disposal	Yes			Yes	3  

User Roles Review

1. User search filter helps with the searching of users in the system. Click on the username to proceed.
2. Select the user's role.
3. Ensure you check both enabled and permanent users. Users working on a short-term period ensure you click on enabled and select the period from calendar.
4. Select the user roles based on the tasks handled by the user.
5. Select the location where the user will be based and ensure to activate the location.
6. Click on save to submit.

KenyaEMR
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Add Stock User Role Scope

User
nsiza nsiza nsiza

Role
Inventory Manager

Enabled ?
 Permanent ?

Active From
Active To

DD/MM/YYYY 📅
DD/MM/YYYY 📅

Stock Operations
The role will be applicable to only selected stock operations.

Adjustment
 Disposal
 Transfer Out
 Receipt
 Return
 Stock Issue
 Requisition
 Stock Take
 Opening Stock

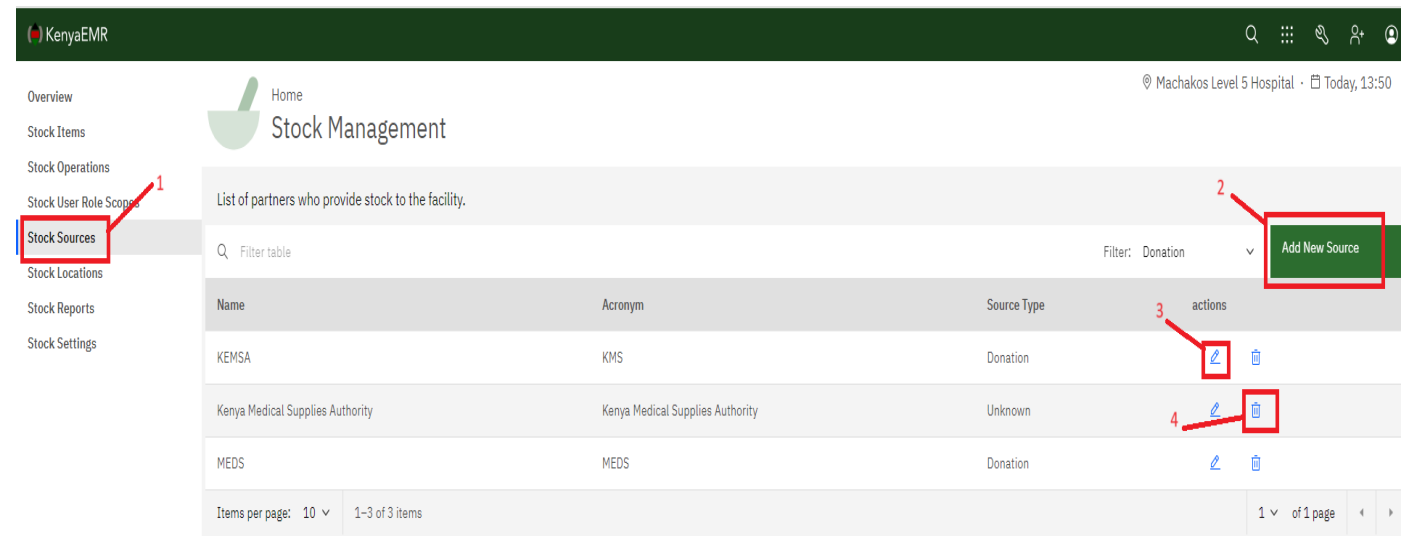
Locations
Use the toggle to apply this scope to the locations under the selected location.

Main Store
 1 Pharmacy

Cancel
Save

SECTION 2: Stock Sources

1. Click on stock sources to access the source list page.
2. Click on Add New Source to add a new source.
3. For existing stock sources, click on the pencil button if you want to edit.
4. Click on the remove button if you want to remove a source.









KenyaEMR Home Stock Management

Machakos Level 5 Hospital · Today, 13:50

Overview
 Stock Items
 Stock Operations
 Stock User Role Scopes
Stock Sources
 Stock Locations
 Stock Reports
 Stock Settings

List of partners who provide stock to the facility.

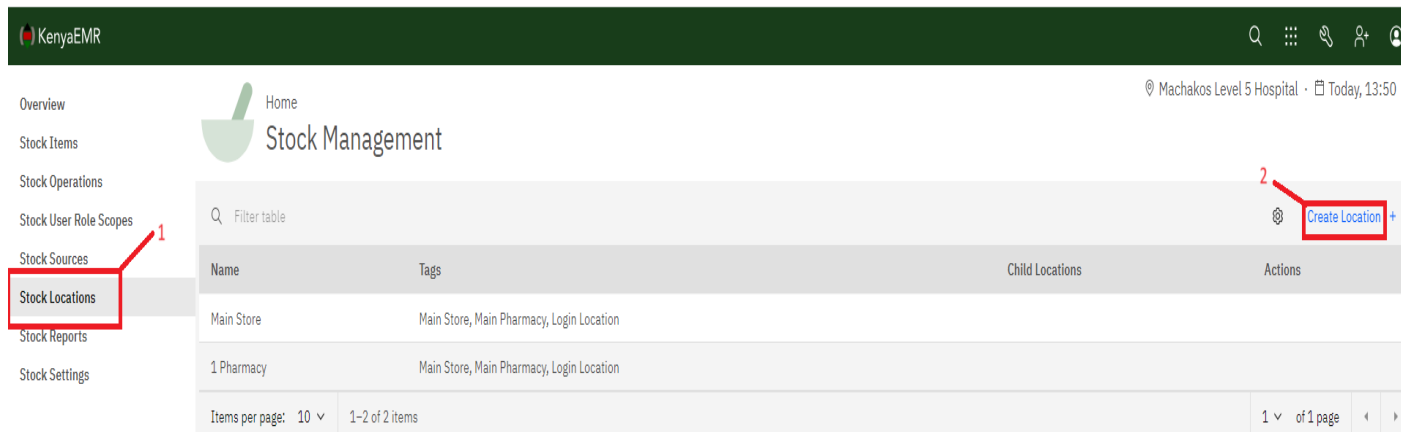
Filter table Filter: Donation Add New Source

Name	Acronym	Source Type	actions
KEMSA	KMS	Donation	 
Kenya Medical Supplies Authority	Kenya Medical Supplies Authority	Unknown	 
MEDS	MEDS	Donation	 

Items per page: 10 1-3 of 3 items 1 of 1 page

SECTION 3: Stock Locations

1. Click on stock locations to load the locations page.
2. Click on Create location add new receiving or dispensing locations.



KenyaEMR Home Stock Management

Machakos Level 5 Hospital · Today, 13:50

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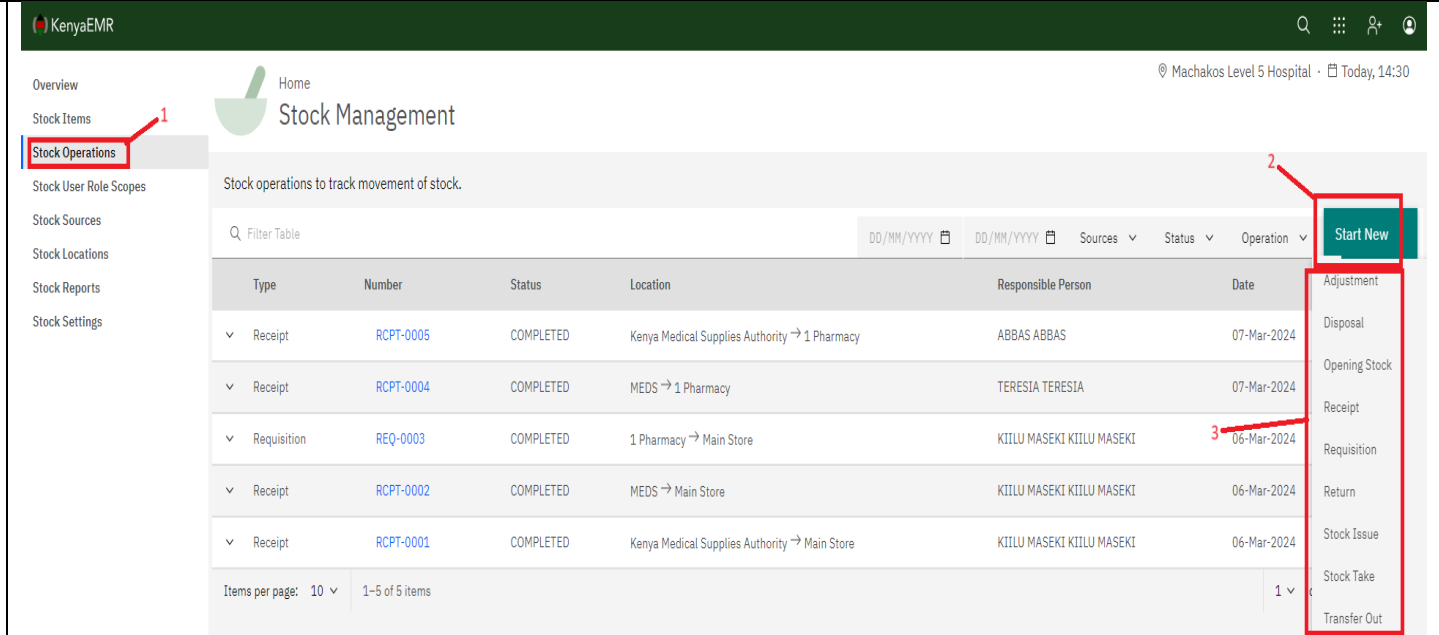
Filter table Create Location +

Name	Tags	Child Locations	Actions
Main Store	Main Store, Main Pharmacy, Login Location		
1 Pharmacy	Main Store, Main Pharmacy, Login Location		

Items per page: 10 1-2 of 2 items 1 of 1 page

SECTION 4: Stock Operations

1. Click on stock operations to launch the stock operations page.
2. Click on start new to get the stock operations.
3. Select a stock operation and proceed.



KenyaEMR Home Stock Management

Stock operations to track movement of stock.

Type	Number	Status	Location	Responsible Person	Date
Receipt	RCPT-0005	COMPLETED	Kenya Medical Supplies Authority → 1 Pharmacy	ABBAS ABBAS	07-Mar-2024
Receipt	RCPT-0004	COMPLETED	MEDS → 1 Pharmacy	TERESIA TERESIA	07-Mar-2024
Requisition	REQ-0003	COMPLETED	1 Pharmacy → Main Store	KIILU MASEKI KIILU MASEKI	06-Mar-2024
Receipt	RCPT-0002	COMPLETED	MEDS → Main Store	KIILU MASEKI KIILU MASEKI	06-Mar-2024
Receipt	RCPT-0001	COMPLETED	Kenya Medical Supplies Authority → Main Store	KIILU MASEKI KIILU MASEKI	06-Mar-2024

Items per page: 10 | 1-5 of 5 items

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