



## Publication information

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☰ Revision history

### Edition notice

This publication is intended for users of the Roche Inventory Solution application.

Not all functionality described in this publication may be available to all users.

Every effort has been made to ensure that all the information contained in this publication is correct at the time of publishing. However, the manufacturer of this product may need to update the publication information as output of product surveillance activities, leading to a new version of this publication.

### Where to find information

The **User Assistance** and the **User Guide** contain all information about the Roche Inventory Solution application including the use of the hand-held device. Both publications have the same content.

The **Quick Reference Guide** gives a brief introduction to important routine tasks.

### General attention

Ensure that you are familiar with the instructions and safety information in the **User Assistance** and **User Guide**.

- ▶ Pay particular attention to all safety notices.
- ▶ Always follow the instructions in the **User Assistance** and **User Guide**.
- ▶ Do not use the application in a way that is not described in the **User Assistance** and **User Guide**.
- ▶ Store all publications in a safe and easily retrievable place.

### Training

Do not carry out operation tasks unless you have received training from Roche Diagnostics or from your local key user. Leave tasks that are not described in the user documentation to trained Roche Service representatives.

<b>Screenshots</b>	The screenshots in this publication have been added exclusively for illustration purposes. Configurable and variable data, such as products, orders, or path names visible therein must not be used.
<b>User interface elements</b>	The displayed elements depend on your user role's access rights. Some elements described in this publication may not appear in your user interface.
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<b>Feedback</b>	Every effort has been made to ensure that this publication fulfills the intended use. All feedback on any aspect of this publication is welcome and is considered during updates. Contact your Roche representative, should you have any such feedback.

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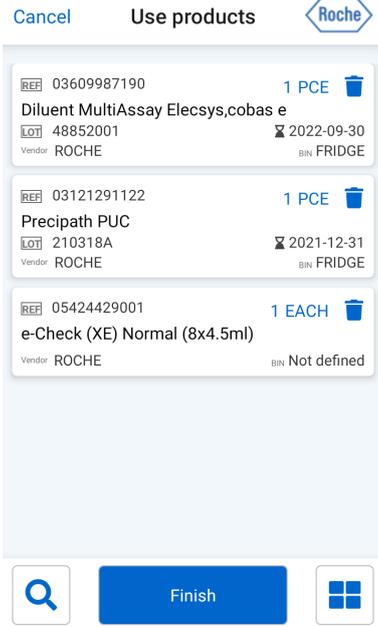
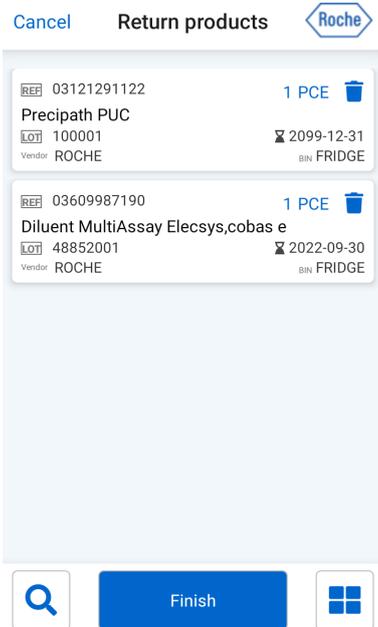
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# Quick reference: Using products

To use products, use the hand-held device to:

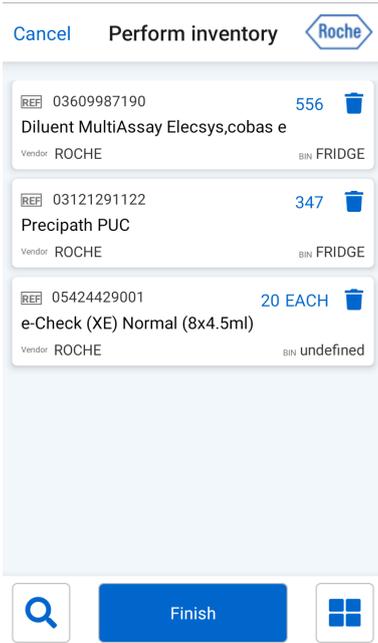
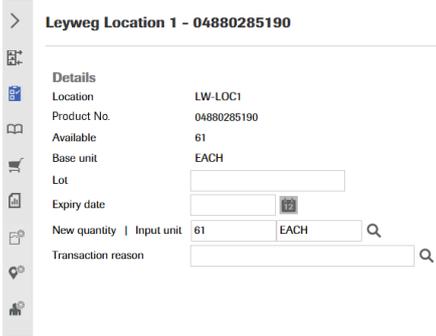
- Remove products from storage.
- Return any unused product to storage.

Steps	User action
<p><b>1 Removing products</b></p> 	<ol style="list-style-type: none"> <li>1. Choose  &gt; <b>Use products</b>.</li> <li>2. Remove the product from storage and scan the barcode. <ul style="list-style-type: none"> <li>– Alternatively, search for the product using the  search function.</li> </ul> </li> <li>3. If multiple lots are displayed: <ul style="list-style-type: none"> <li>– Choose the correct lot number.</li> <li>– Or, scan the lot barcode (if available).</li> </ul> </li> <li>4. To remove another product from storage, repeat steps <b>2–3</b>.</li> <li>5. When you have finished removing products from storage: <ul style="list-style-type: none"> <li>– Ensure all products are listed with the correct quantity and lot number.</li> <li>– To remove a product from the list, choose  &gt; <b>Confirm</b>.</li> </ul> </li> <li>6. Choose the <b>Finish</b> button.</li> </ol>
<p><b>2 Returning products</b></p> 	<ol style="list-style-type: none"> <li>1. Choose  &gt; <b>Return products</b>.</li> <li>2. Scan the product barcode of the product you want to return to storage. <ul style="list-style-type: none"> <li>– Alternatively, search for the product using the  search function.</li> </ul> </li> <li>3. If multiple lots are displayed: <ul style="list-style-type: none"> <li>– Choose the correct lot number.</li> <li>– Or, scan the lot barcode (if available).</li> </ul> </li> <li>4. To return another product to storage, repeat steps <b>2–3</b>.</li> <li>5. When you have finished scanning all products that you are returning to storage: <ul style="list-style-type: none"> <li>– Ensure all the products are listed with the correct quantity and lot number.</li> <li>– To delete a product from the list, choose  &gt; <b>Confirm</b>.</li> </ul> </li> <li>6. Choose the <b>Finish</b> button.</li> </ol>

## Removing and returning products from the inventory

# Quick reference: Performing and adjusting inventory

Periodically perform inventory to keep product quantities up to date.

Steps		User action
<p><b>1</b> Hand-held device: <b>Performing inventory</b></p>	 <p>The screenshot shows a hand-held device interface with a 'Perform inventory' screen. At the top, there are 'Cancel' and 'Perform inventory' buttons, and a Roche logo. Below, there is a list of products:</p> <ul style="list-style-type: none"> <li>REF: 03609987190, Diluent MultiAssay Elecsys,cobas e, Vendor: ROCHE, BIN: FRIDGE, Quantity: 556</li> <li>REF: 03121291122, Precipath PUC, Vendor: ROCHE, BIN: FRIDGE, Quantity: 347</li> <li>REF: 05424429001, e-Check (XE) Normal (8x4.5ml), Vendor: ROCHE, BIN: undefined, Quantity: 20 EACH</li> </ul> <p>At the bottom, there is a search icon, a 'Finish' button, and a grid icon.</p>	<ol style="list-style-type: none"> <li>Choose <b>☐ &gt; Perform inventory</b>. <ul style="list-style-type: none"> <li>If warned, cancel the desktop application count before continuing (see <b>User Assistance</b>).</li> </ul> </li> <li>Scan a product barcode. <ul style="list-style-type: none"> <li>Alternatively, search for the product using the <b>Q</b> search function.</li> </ul> </li> <li>Count the product: <ul style="list-style-type: none"> <li>Enter the quantity in the displayed field.</li> <li>Choose the <b>DONE</b> button.</li> </ul> </li> <li>If the product is lot-controlled: <ul style="list-style-type: none"> <li>Count and enter the product quantity for <b>each lot</b> (<b>▲</b>).</li> <li>Choose the <b>Finish</b> button.</li> </ul> </li> <li>To check the inventory of another product, perform steps <b>2-4</b>.</li> <li>When your inventory count is complete, choose the <b>Finish</b> button.</li> </ol>
<p><b>2</b> Desktop application: <b>Adjusting product quantities</b></p> <p> Use this procedure for the following reasons:</p> <ul style="list-style-type: none"> <li>Product quality issue</li> <li>Product disposal</li> <li>Product quantity deviations</li> <li>To create a new lot</li> </ul>	 <p>The screenshot shows a desktop application interface for adjusting product quantities. It displays details for 'Leyweg Location 1 - 04880285190'.</p> <p>Details:</p> <ul style="list-style-type: none"> <li>Location: LW-LOC1</li> <li>Product No.: 04880285190</li> <li>Available: 61</li> <li>Base unit: EACH</li> <li>Lot: [input field]</li> <li>Expiry date: [input field]</li> <li>New quantity: 61   Input unit: EACH</li> <li>Transaction reason: [input field]</li> </ul>	<ol style="list-style-type: none"> <li>Choose <b>Maintenance tasks &gt; Adjust inventory</b>.</li> <li>Search for the product number.</li> <li>Open the details of the product (<b>&gt;</b>).</li> <li>For lot-controlled products, enter the lot number in the <b>Lot</b> field and press the Tab key.</li> <li>In the <b>New quantity</b> field, enter the new quantity of the product.</li> <li>In the <b>Transaction reason</b> field, enter a reason for the change.</li> <li>Choose the <b>Submit</b> button.</li> </ol>

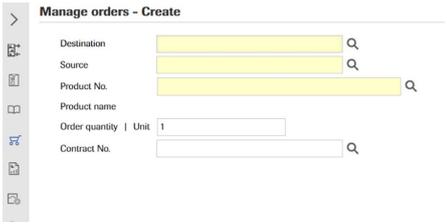
 Performing and adjusting inventory

Steps		User action
<b>3</b> Hand-held device: <b>Disposing of expired lots</b>	<p>To dispose of an expired lot, scan the product barcode</p> 	<ol style="list-style-type: none"><li>1. Choose  &gt; <b>Disposal of expired lots</b>.</li><li>2. Scan the product barcode.<ul style="list-style-type: none"><li>– Alternatively, search for the product using the  search function.</li></ul></li><li>3. From the list of expired lots, choose the lot you want to dispose of.</li><li>4. Choose the <b>OK</b> button.</li></ol>

 Performing and adjusting inventory

# Quick reference: Ordering products

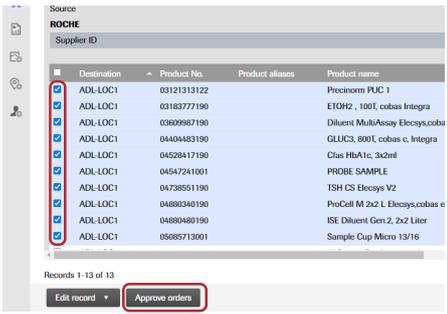
Typically, orders are created automatically by the Roche Inventory Solution application. However, you can also create orders manually using the desktop application.

Steps	User action
<p><b>1 Creating orders manually</b></p> 	<ol style="list-style-type: none"> <li>1. Choose <b>Orders &gt; Manage orders</b>.</li> <li>2. Choose the <b>Create</b> button.</li> <li>3. Enter the fields <b>Destination</b>, <b>Source</b>, <b>Product No.</b>, and <b>Order quantity</b>. <ul style="list-style-type: none"> <li>– <b>Contract no.</b> is an optional field.</li> </ul> </li> <li>4. Choose <b>Continue &gt; Submit</b>.</li> <li>5. To order more products, repeat steps <b>3-4</b>.</li> </ol>
<p><b>2 Generating orders manually using reorder groups</b> This is only required if orders need to be generated outside the reorder group schedule.</p> 	<ol style="list-style-type: none"> <li>1. Choose <b>Location settings &gt; Reorder groups</b>.</li> <li>2. Search for the reorder group and select the check box.</li> <li>3. Choose <b>Edit record &gt; Generate order</b>.</li> </ol>

☰ Creating orders manually using the desktop application

## Reviewing and approving orders

All orders must be approved before they are submitted to the vendor.

Steps	User action
<p><b>1 Reviewing and approving orders</b></p> 	<ol style="list-style-type: none"> <li>1. Choose <b>Orders &gt; Approve orders</b>.</li> <li>2. Search for the orders that need approval.</li> <li>3. If necessary, edit the <b>Order quantity</b> by double clicking on the value.</li> <li>4. Select the orders that need approval and choose the <b>Approve orders</b> button.</li> <li>5. Choose the <b>Submit</b> button.</li> <li>6. When connected to Roche SAP, Roche and MLS orders are automatically submitted and no further action is required.</li> <li>7. If the application is not connected to Roche SAP, or you are ordering from a third-party vendor: <ul style="list-style-type: none"> <li>– Either, manually export and send the order (follow the next procedure).</li> <li>– Or, configure order emails for third-party products (see <b>User Assistance</b>).</li> </ul> </li> </ol>

☰ Reviewing and approving orders using the desktop application

Steps	User action
<b>2 Exporting and sending orders</b>	<ol style="list-style-type: none"> <li>1. Choose <b>Orders &gt; Export orders</b>.</li> <li>2. Search for the orders to be exported.</li> <li>3. Choose the <b>Export as Excel</b> button.</li> <li>4. Manually send the Excel file to the vendor (e.g., via email).</li> </ol>

Product No.	Product name	Product alias	Order quantity	Unit	Vendor order No.	Invoiced PO No.	First delivery date	Order No.
83213122	Precision PUC		10	PCK				365
859271281	Sample Cup Micro 1216		25	PCK				242

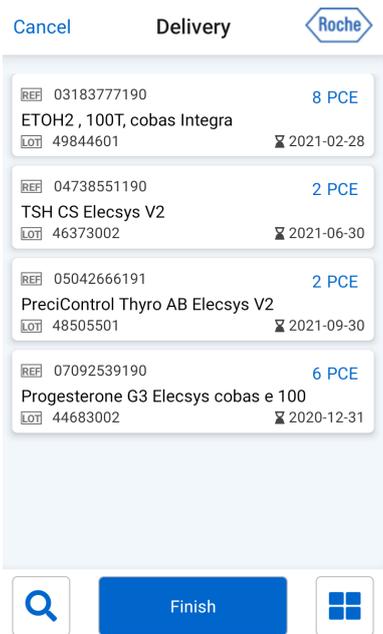
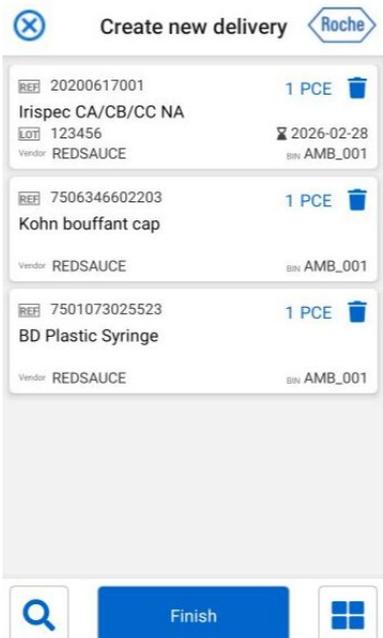
Records 1 2 of 2

Export as Excel

☰ Reviewing and approving orders using the desktop application

# Quick reference: Receiving deliveries

After a product is delivered to a location, use the hand-held device to check and confirm the delivery.

Steps		User action
<p><b>1 Receiving deliveries of Roche products coming from Roche SAP</b></p> <p> This procedure is applicable if there is a shipment ID associated with the delivery.</p>	 <p>The screenshot shows a mobile application interface for receiving deliveries. At the top, there are buttons for 'Cancel', 'Delivery', and the Roche logo. Below this is a list of four products:</p> <ul style="list-style-type: none"> <li>Product 1: REF 03183777190, ETOH2, 100T, cobas Integra, LOT 49844601, 8 PCE, expiry 2021-02-28.</li> <li>Product 2: REF 04738551190, TSH CS Elecsys V2, LOT 46373002, 2 PCE, expiry 2021-06-30.</li> <li>Product 3: REF 05042666191, PreciControl Thyro AB Elecsys V2, LOT 48505501, 2 PCE, expiry 2021-09-30.</li> <li>Product 4: REF 07092539190, Progesterone G3 Elecsys cobas e 100, LOT 44683002, 6 PCE, expiry 2020-12-31.</li> </ul> <p>At the bottom of the screen, there is a search icon, a blue 'Finish' button, and the Roche logo.</p>	<ol style="list-style-type: none"> <li>1. Choose  &gt; <b>Delivery</b>.</li> <li>2. Scan the shipment barcode. <ul style="list-style-type: none"> <li>– Alternatively, enter the shipment ID using the  search function.</li> </ul> </li> <li>3. Ensure the products, lot numbers, and quantities listed match the delivery.</li> <li>4. If an  icon is displayed, choose the icon and enter the missing lot information.</li> <li>5. If the received quantity differs from the displayed quantity, choose the quantity to update it.</li> <li>6. Choose the &gt; <b>Finish</b> button.</li> </ol>
<p><b>2 Creating a new delivery after receiving MLS or third-party products</b></p> <p> This procedure is also applicable to Roche deliveries that have <b>not</b> come from the Roche SAP interface.</p>	 <p>The screenshot shows a mobile application interface for creating a new delivery. At the top, there are buttons for 'Cancel', 'Create new delivery', and the Roche logo. Below this is a list of three products:</p> <ul style="list-style-type: none"> <li>Product 1: REF 20200617001, Irispec CA/CB/CC NA, LOT 123456, 1 PCE, expiry 2026-02-28, Vendor REDSAUCE, BSN AMB_001.</li> <li>Product 2: REF 7506346602203, Kohn bouffant cap, Vendor REDSAUCE, BSN AMB_001.</li> <li>Product 3: REF 7501073025523, BD Plastic Syringe, Vendor REDSAUCE, BSN AMB_001.</li> </ul> <p>At the bottom of the screen, there is a search icon, a blue 'Finish' button, and the Roche logo.</p>	<ol style="list-style-type: none"> <li>1. Choose  &gt; <b>Create new delivery</b>.</li> <li>2. Optionally, insert a <b>Shipment ID</b>.</li> <li>3. Scan the products or use  to search for third-party products.</li> <li>4. For lot-controlled products, scan or enter the requested details and adjust the quantity.</li> <li>5. For products that are not lot controlled, adjust the quantity.</li> <li>6. Choose <b>Finish</b> to finalize the creation of the delivery.</li> </ol>

 Receiving deliveries

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