



# STOCCA, CH2 and SOS User Guide.

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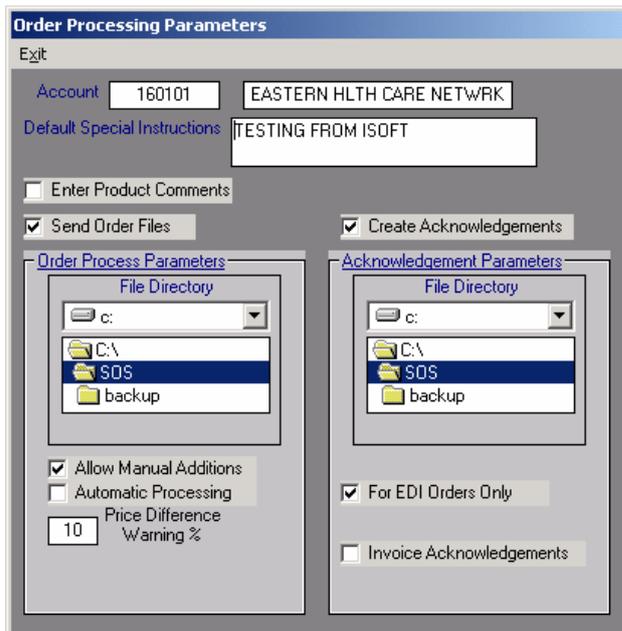
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# COMMERCIAL-IN-CONFIDENCE

## Set up SOS on the workstation

1. Install SOS into "C:\SOS" as described in the "SOS Installation/Upgrade Instructions" document available on our website at [www.ch2.net.au](http://www.ch2.net.au)
2. The SOS.pif file should be loaded into C:\SOS. This is called from the STOCCA application.
3. Check the properties of the SOS.pif file. It runs "sos.exe gst turbo"
4. Set up SOS to run via the internet, send order files and create acknowledgements. These options are available by selecting "Setup" from the menu bar and clicking "Connect/Modem" and "Ordering" (Ordering screen shown below).

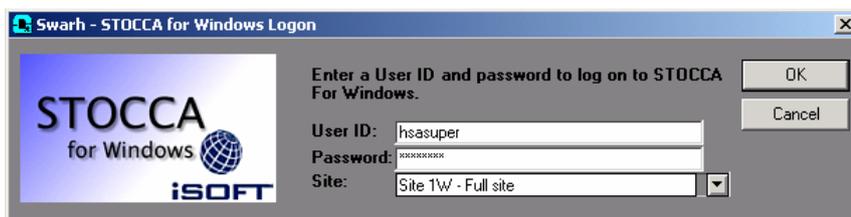


5. Connect to SOS with your supplied user name and password.

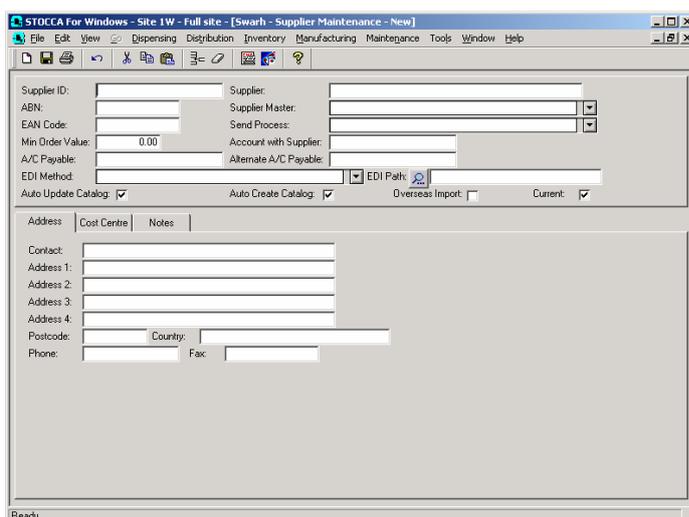
**Create a new supplier for electronic ordering.**

Information on logins to the STOCCA application.

6. Start STOCCA from the icon and log in



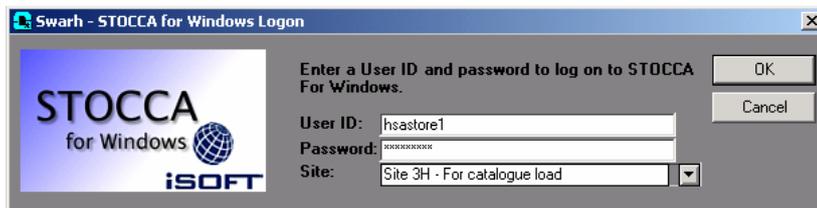
7. Choose Maintenance / Inventory / Supplier from the menus.
8. Click on the [New] icon, and enter mandatory details. Use the [SHIFT] + [F1] for on-line help if needed.



9. Choose a unique Supplier ID, or if you wish, you can use the current CH2 account if it already exists.
10. Put in a free text supplier name
11. Send process MUST BE “Electronic Data Interchange”
12. EDI Method MUST BE “VHA SOS”
13. EDI Path MUST BE “C:\Sos”
14. [Save] the new supplier details.

## ***Import an electronic supplier catalogue***

1. Close STOCCA and log back.



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 STOCCA 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 STOCCA 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 STOCCA***

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 STOCCA 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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## COMMERCIAL-IN-CONFIDENCE

### ***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 STOCCA 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 VHA 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. Where has the order gone? It should have been created in the C:\SOS folder (as identified in the supplier maintenance window)
7. [Connect] and SOS fires up
8. The order can 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 VHA 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.