QUICK REFERENCE GUIDE

Item Velocity Report

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MEDICAL CENTER

Learn how to create a report to support facilities replenishment and to avoid stockouts or overstock.

WAYS TO REPORT

There are two primary ways to analyze Item Velocity. The first is through customized search results in the Location Items activity and the second is with Inventory reporting tools which are pre-structured inventory reports within Tecsys.

Customized Search Results

- 1. To customize the search results in the Location Items activity, navigate to the Location Items resource under the POU (SMS) Masters menu.
- 2. Select the **Personalize** button at the bottom right of the screen.



- 3. In the first tab, add **Search Criteria** options. In the second tab, add **Search Results** options to view specific data.
- 4. Select an Available Field.

Note: Some ideas for possible options for researching Item Velocity include Days on Hand, Six Months Usage Quantity, and Total Number of Replenishments – 30 Days.

- 1. Select the Add button.
- 2. Select Save As.

Search Criteria Search Results 3 Options			
Display Search Results With Details Only	~		
Show Only Fields Containing	Exclude Depreca	ted and Obsoleted Fields	
Available Fields		Show These Fields in This Order	
To Location Total Inventory Quantity Total Inventory Value (Items) Total Inventory Value (Items) Total I 4 of Replenishments (Critical Replenishment Loca Total Value of Replenishments (Standard Replenishment Loca Total Number of Replenishments - Last 30 Days (Critical Repl Total Number of Replenishments - Last 30 Days (Standard Rep Total Number of Replenishments - Last 60 Days (Critical Repl Total Number of Replenishments - Last 60 Days (Locations)	Add Remove	Par Location (Locations) Result Details Item Description 1 (Items) In Location Quantity Base UOM (Items) Urage UOM 5 UV Order Very Received Quantity Minimum Quantity	1 Up

3. The Location Items pop-up window appears. Enter a name for the new View into the **New Title** box.

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- 4. Select **Submit**. The personalized search criteria and results displays.
- 5. Select **Search**. The results display.
- 6. Select the **Export to Excel** button. The Excel spreadsheet downloads to your device with the list of results.

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	Search Crite	eria 🗎 Sav	re F 10 Jes 🕀 More							
				~						
	Records 1-5	0 of 400+							1 ~ >	Show All
		ltem ^	Description 1 (Items)	In Location Quantity	Base UOM	Usage UOM	Supply Order	Delivery	Received Quantity	Minimum Quantity
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		100100	Insulin Delivery Device	16	EA	EA	<u>o</u> *	<u>0</u> *	0	з
	∎∎	100103	Needle 23g1	400	EA	EA	<u>0</u> *	<u>0</u> *	0	200
		100104	Sutures 2-0 Sofsilk 18" 45cm	96	EA	EA	<u>o</u> *	<u>o</u> *	0	48
		100105	BD 20GA 1.16", 1.1X30mm IV Catheter	100	EA	EA	<u>o</u> *	<u>0</u> *	0	5C
	9	100106	Syringe 3cc, 0.50 x 25mm; 25g x 1"	100	EA	EA	<u>o</u> *	<u>o</u> *	0	5C 🗸
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Inventory Reporting Tools

- 1. To research Item Velocity using the inventory reporting tools, start in the Analytics menu.
- 2. Expand Inventory Activity Reports and select a report.
- 3. Expand Dashboards to launch the needed report(s), such as **Inventory Optimization**.

Expiration	Management
Quota Opti	imization
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	y Values Reports
	<u>y Activity Reports</u>
Supply	
Open S	upply Orders by Status
1±1 Supp	oly Order Fill Reports
Tracked	<u>I Item Activity (Last 30 Days)</u>
Two-Bir	Replenishment Activity by Location (Last 30 Days)
+ Procedu	Iral Area
Dashbo	ards
Case C	osting
Case Pi	icking
Invento	Γ <u>γ</u>
Invento	ry Optimization
POU Tr	ansaction Trends
Prefere	nce Card Optimization
ROI Mo	nitoring
ROI For	m
Supply	Order Performance