Stockie - User guide

User guide for the Cath Lab stock and requisition web app (Items, should-order, orders, receive, stock take, vendors, settings).

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Getting started

Getting started

What Stockie is

Stockie is a stock and requisition web app.

The replenishment loop

1. Keep the catalogue up to date (on-hand, target/par, location, vendor, price).
2. Review **Should order** (target − on-hand − back order).
3. Fill the ordering session and create purchase orders (one per vendor).
4. Raise each requisition in hospital iProc and record the iProc number in Stockie.
5. Receive stock (full or partial) when deliveries arrive.

Two requisition numbers

ID	Meaning
Internal req no	Allocated by Stockie when you create an order.
iProc	Hospital procurement number, entered after the buy is raised outside Stockie.

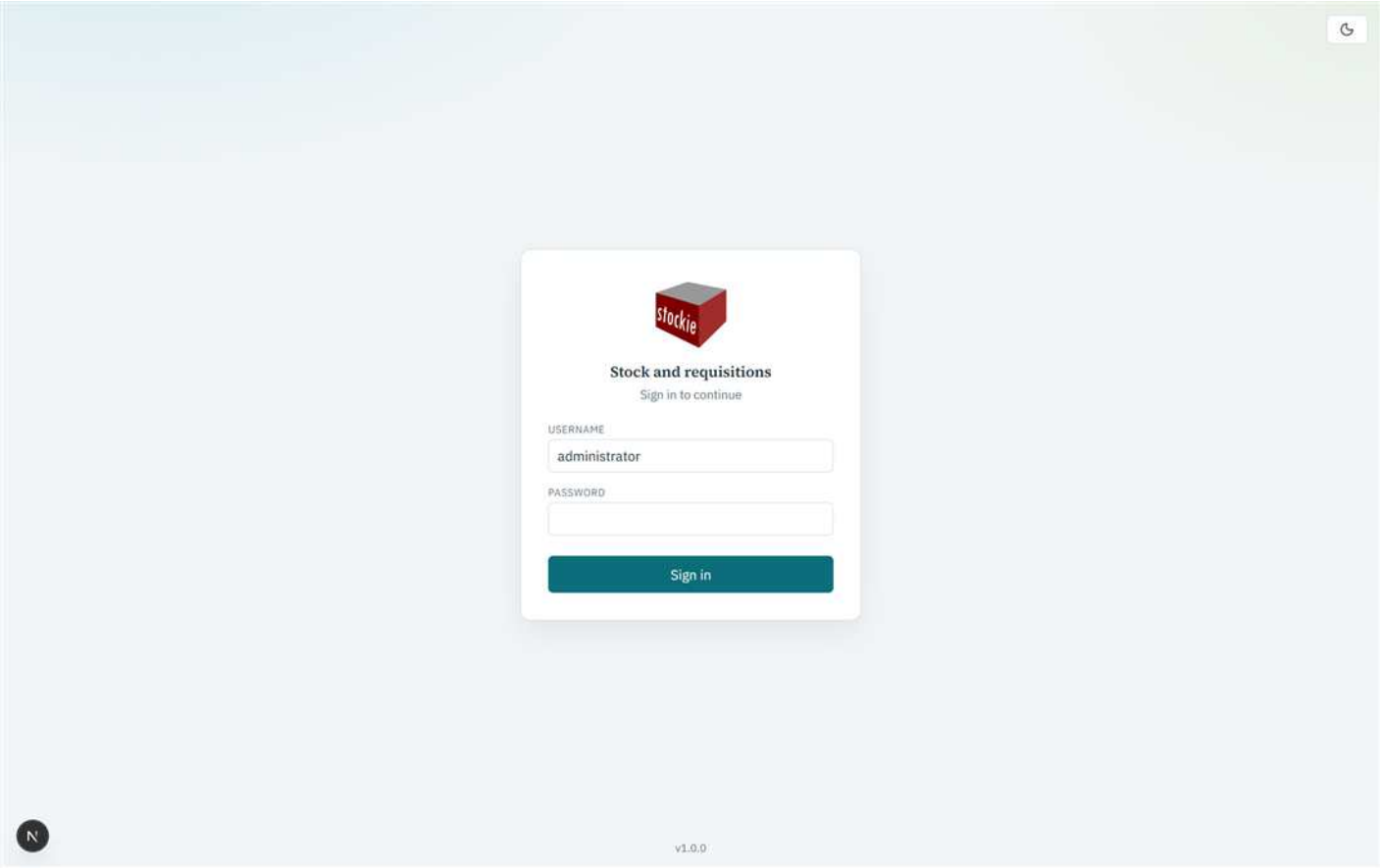
Receive lookup works with **either** number.

Getting started

Sign in & MFA

Sign in & MFA

Open the Stockie web address provided by your site. Sign in with your **username** and **password**.



Login screen

Multi-factor authentication (MFA)

If MFA is enabled for the site, you may be asked to:

- **Set up email** the first time (enter a work email), then enter the code sent to that address; or
- **Enter a verification code** sent to your registered email on each sign-in.

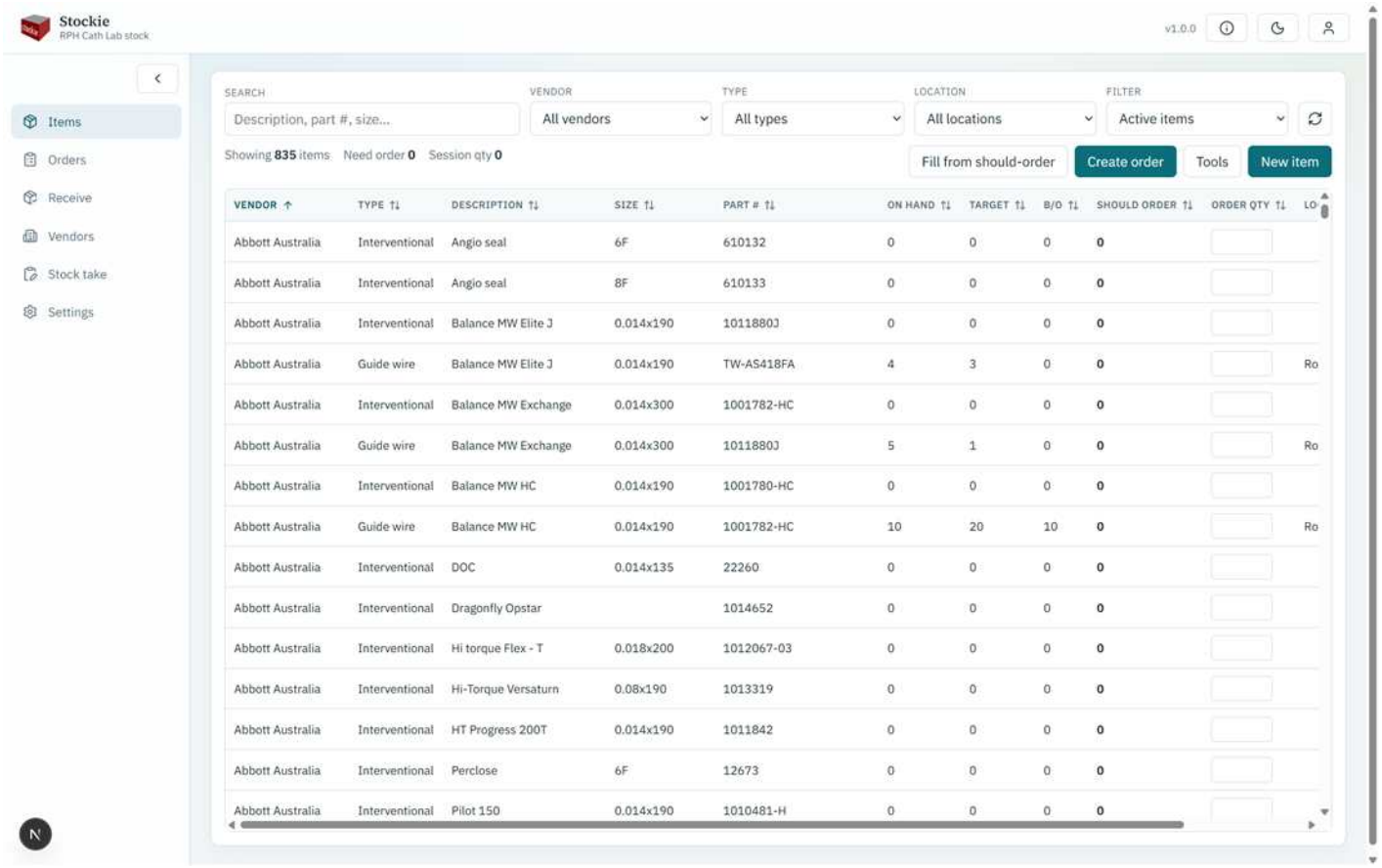
You can resend the code from the login screen if needed. After a successful sign-in you land on the Items catalogue.

Accounts are managed in Stockie (Settings → Security for administrators).

Getting around

Getting around

After sign-in, every screen uses the same shell: a collapsible side navigation, a top bar with site subtitle and version, and the main work area.



Side navigation with Items selected

Navigation

Menu	Purpose
Items	Catalogue, should-order, ordering session

Menu	Purpose
Orders	Purchase orders / internal requisitions
Receive	Look up an order and receive stock
Vendors	Supplier list used by items and order split
Stock take	Count stock and update on-hand
Settings	Administrators only — site coding, email, users, lookups, audit

Top bar

- **About** — app version and release notes
- **Theme** — light or dark
- **Account menu** — Profile and Sign out. Read-only users see an indication that they cannot change stock.

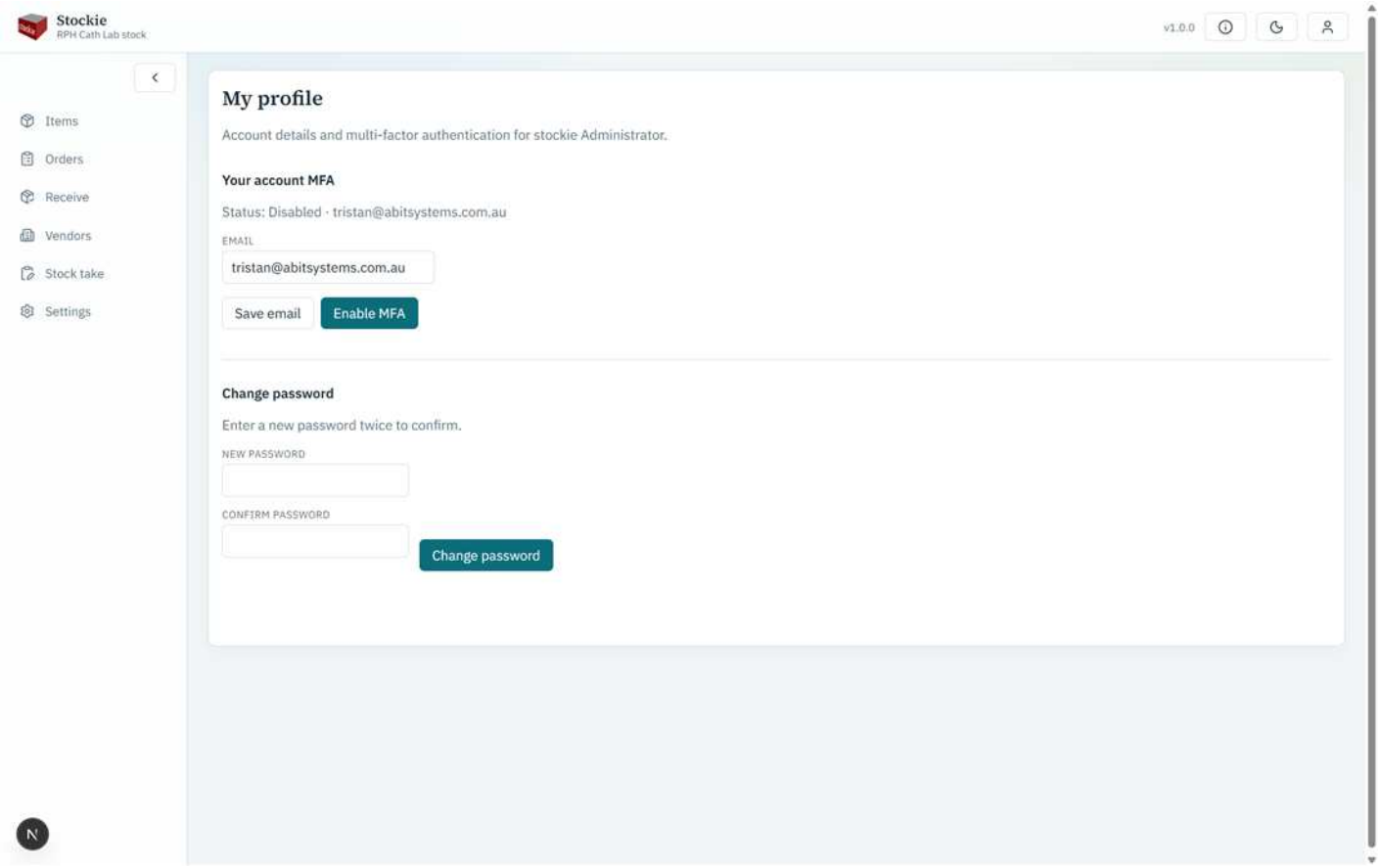
On small screens, open the menu with the hamburger control. Collapse the sidebar on desktop when you want more grid space.

Getting started

Your profile

Your profile

Open the account menu (your name) → **Profile**.



Profile: email, password, and MFA

What you can change

- **Email** — used for MFA codes when MFA is enabled
- **Password** — if site MFA is on, you may need a verification code to confirm the change
- **MFA for your account** — enable or disable (when the site allows MFA)

Roles & permissions

Roles & permissions

Access is controlled per staff member. The catalogue and orders remain visible for read-only users; write actions are hidden when you do not have write access.

Level	Typical access
Reader	View Items, Orders, Vendors, Receive lists. Cannot change quantities, create orders, receive, or save stock take.
Write	Update items, run the ordering session, create orders, receive stock, save stock take.
Administrator	Everything above, plus Settings (users, MFA/SMTP, hospital coding, lookups, audit). Administrators always have write access.

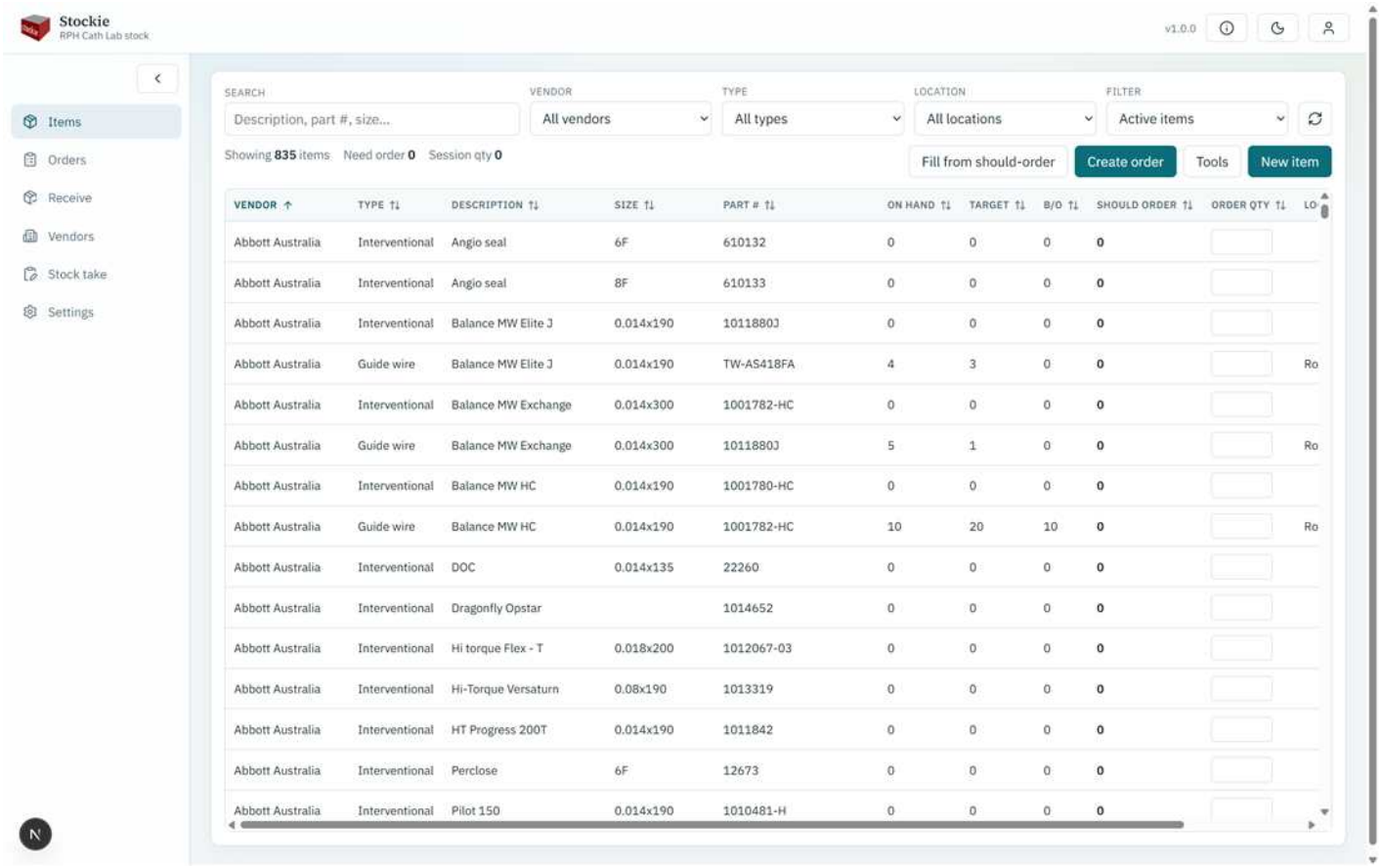
Module grants are configured under **Settings → Security**.

Items

Catalogue grid

Catalogue grid

Items is the home screen. It shows the live catalogue: vendor, type, description, size, part number, on-hand, target, back order (B/O), should-order, order qty, location, and price.



Items catalogue with filters and session actions

Filters and sorting

- Search by description, part number, and related text.
- Filter by type, location, and list mode (for example active items, or items that need ordering).
- Click column headers to sort.

- Use the refresh icon at the end of the filter row to reload.

Opening an item

Click a row to open the item detail / edit screen. With write access you can also create a new item from the actions area.

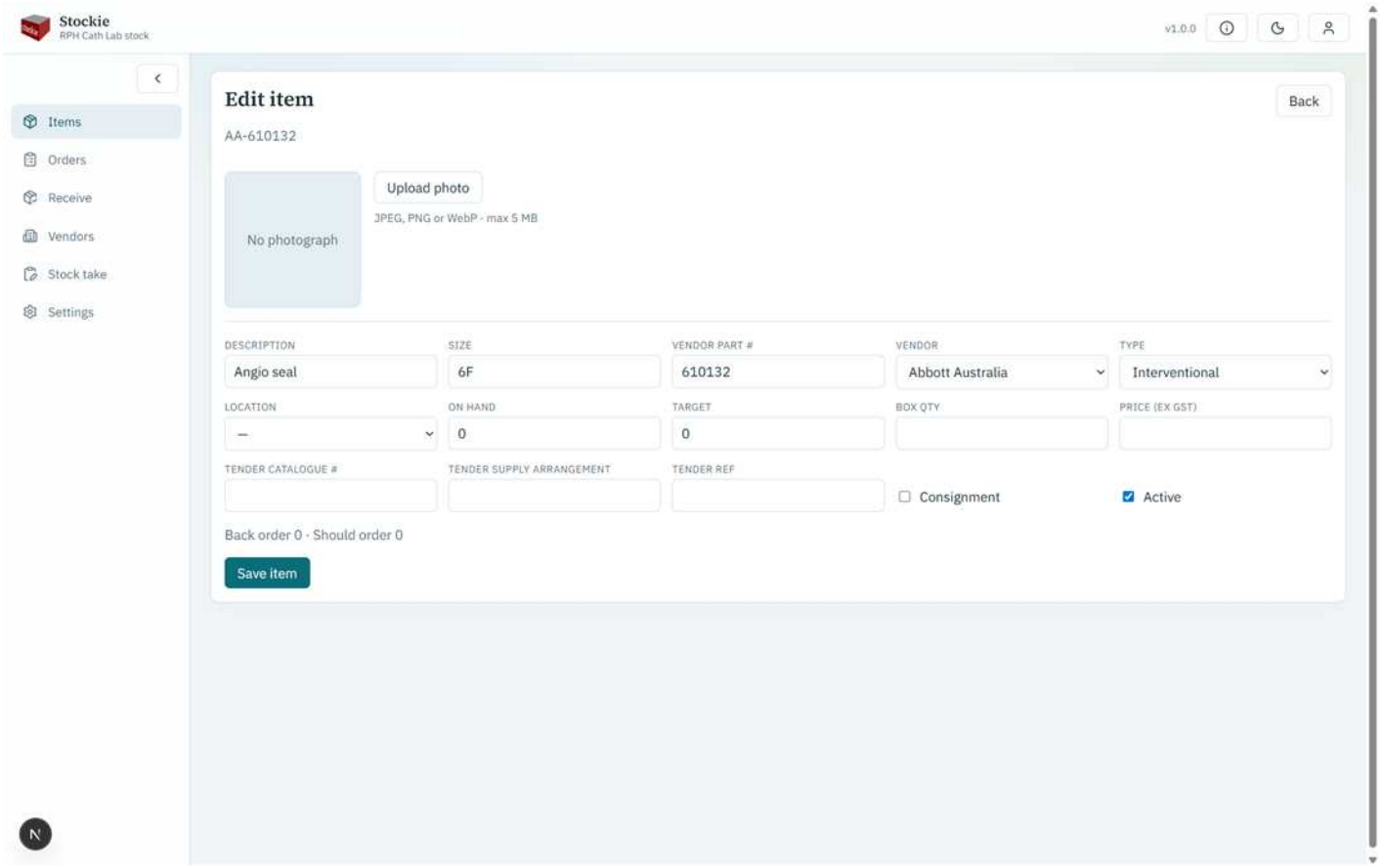
Key quantities

Column	Meaning
On hand	Current stock count in the lab.
Target	Par / target level you want to hold.
B/O	Back order — quantity already on open purchase orders and not yet received.
Should order	How many more to order (see next topic).
Order qty	Your session cart quantity for this item.

Create & edit items

Create & edit items

From Items, choose **New item** or open a row. With write access you can save changes; readers can view details only.



Item form: catalogue fields and optional photograph

Main fields

- Description, size, vendor, type, location
- Vendor part number (important for matching supply lines)
- On hand and target quantities
- Box quantity and price (ex GST)

- Tender catalogue / supply arrangement / reference (when used)
- Consignment flag and Active flag

On edit, Stockie also shows derived **back order** and **should-order** for the item. You can attach or replace a photograph on edit.

There is no general document store on items in this web version — only an optional photo.

Should-order & ordering session

Should-order & ordering session

Should-order formula

For each item:

Should order = Target − On hand − Back order

- The grid displays the need as **zero or more** (negative values are shown as 0).
- **Back order** is calculated from open purchase-order lines: sum of (ordered − received) on lines that are not void and not fully received. It is not a separately typed field on the item.

Do not treat “target − on hand” alone as the order quantity. Ignoring back order overstates what you still need to buy.

Ordering session

With write access, enter quantities in the **Order qty** column. Values are saved to your personal session cart.

- **Fill from should-order** copies only *positive* should-order amounts into Order qty.
- The toolbar shows a session total when lines have quantity.
- When ready, choose **Create order** to review and confirm (see Orders).

Import / export

Import / export

On the Items screen, open **Tools** for Excel-oriented catalogue helpers (write access required to import).

- **Export** — download the catalogue for offline review or backup.
- **Import** — upload a spreadsheet to create or update items. Follow the dialog instructions and review any reported errors before relying on the result.

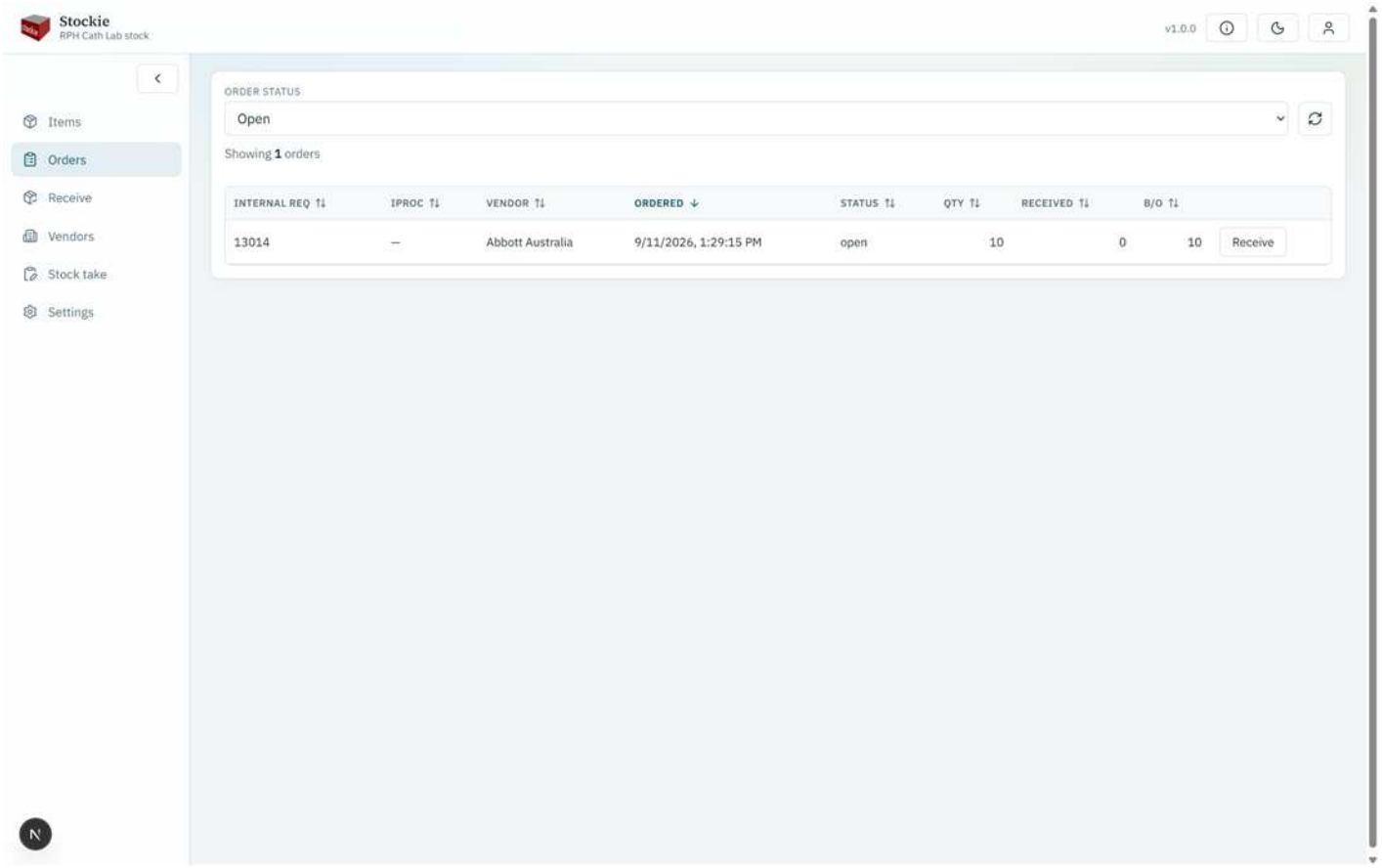
Prefer editing single items in the app for day-to-day corrections; use import for bulk catalogue maintenance.

Orders

Orders list

Orders list

Orders lists purchase orders created from ordering sessions. Each order has an internal requisition number, vendor, status, and optional iProc number.



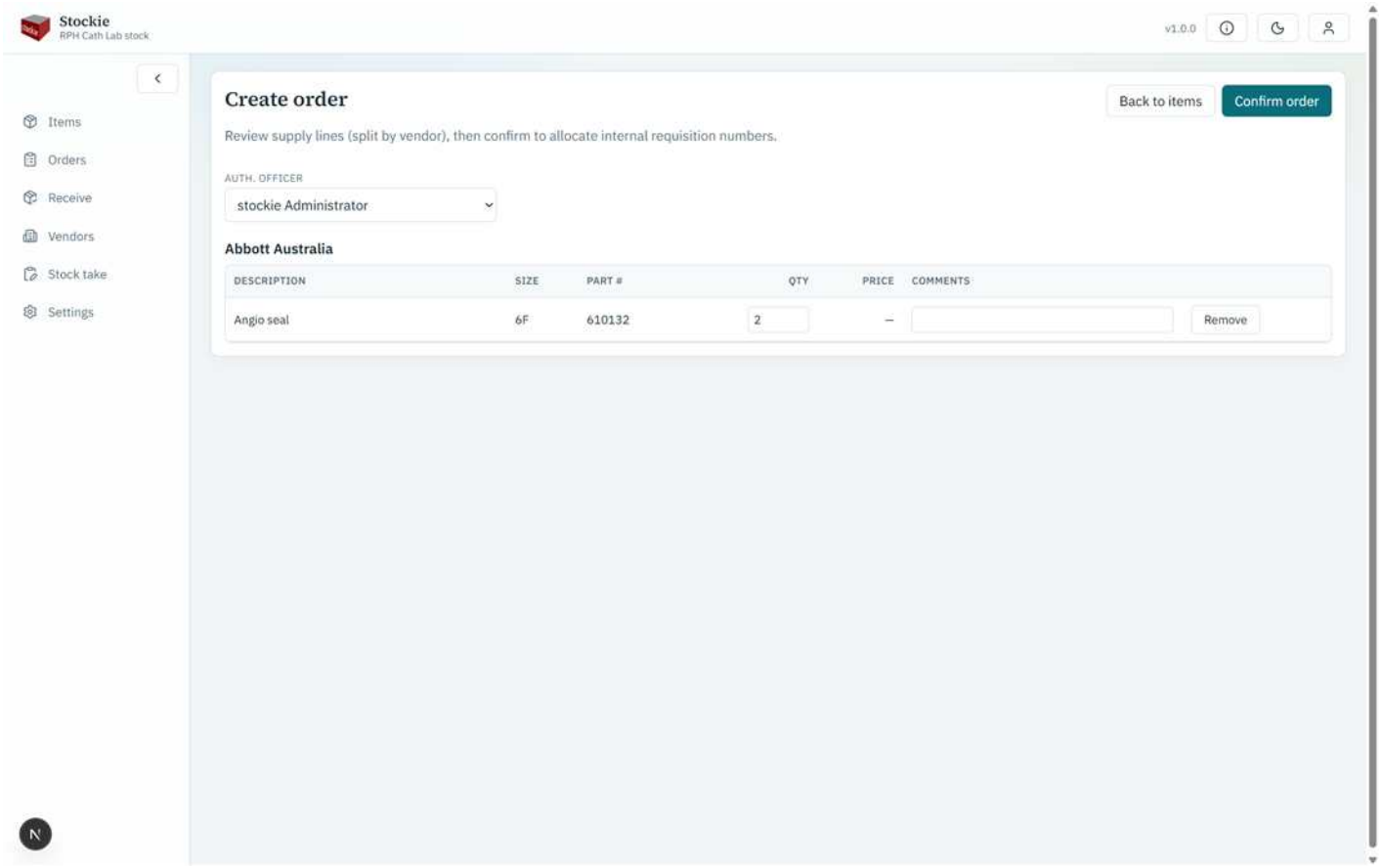
Orders filtered to open requisitions

- Filter open, closed, or all orders.
- Search and sort as needed.
- Open a row for order detail, iProc entry, and a path to receive.

Create order

Create order

From Items, after filling Order qty, choose **Create order**. Stockie opens a review screen grouped **by vendor**.



Session cart reviewed and split by vendor

Confirming

1. Check quantities and optional line comments.
2. Select the **Auth. officer** (staff list; defaults to you).
3. Confirm. Stockie creates one purchase order per vendor and allocates an internal req no to each.

Hospital coding (deliver-to, cost centre, next internal req number, site subtitle) comes from **Settings**, not from fields typed on this screen. The session cart is cleared after a successful create.

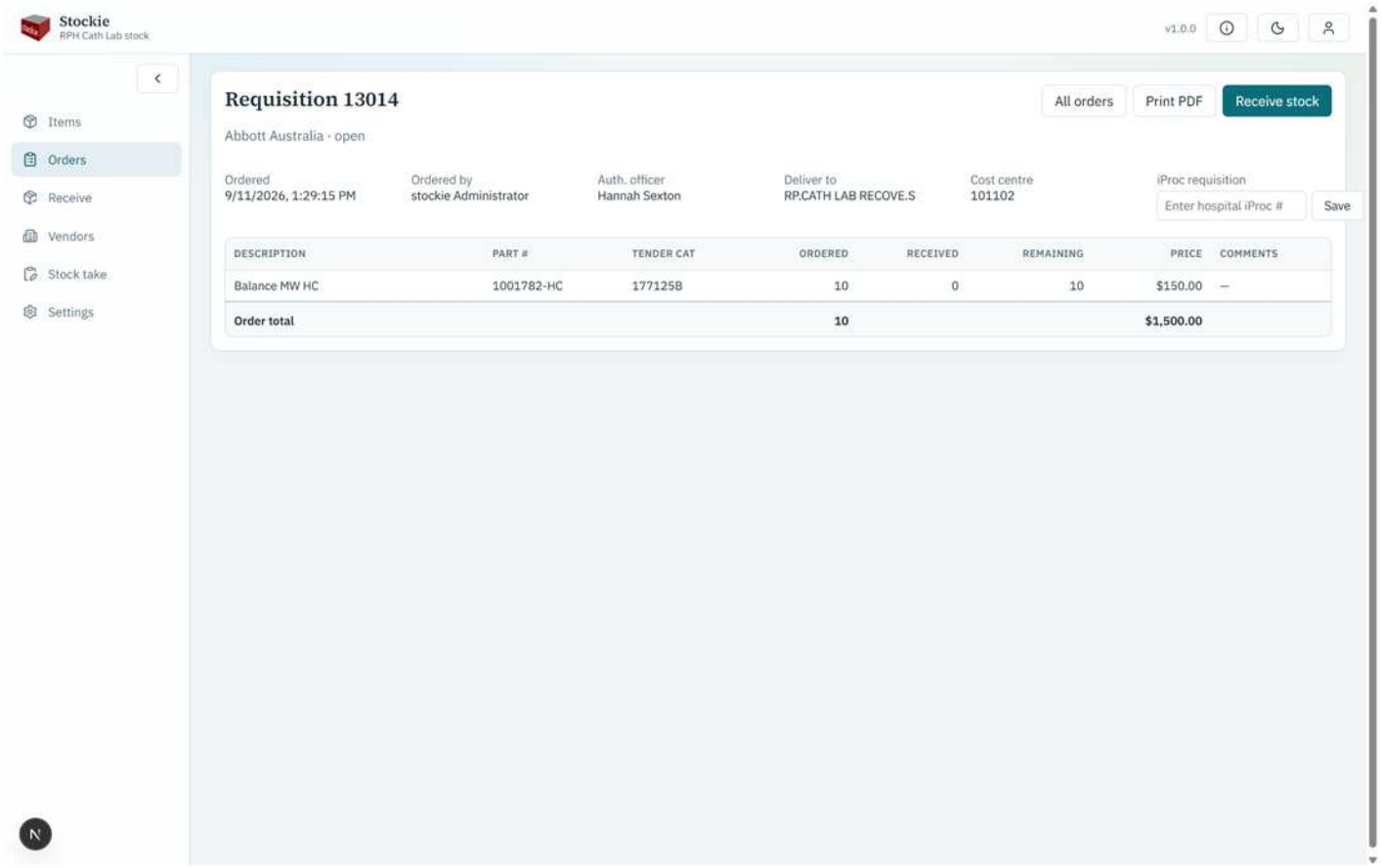
If several vendors were in the cart, you return to the Orders list. If there was only one vendor, you open that order.

Orders

iProc number

iProc number

After you create Stockie orders, raise the matching requisitions in the hospital iProcurement system. Then open each order in Stockie and enter the **iProc** number.



Order detail — record the hospital iProc number

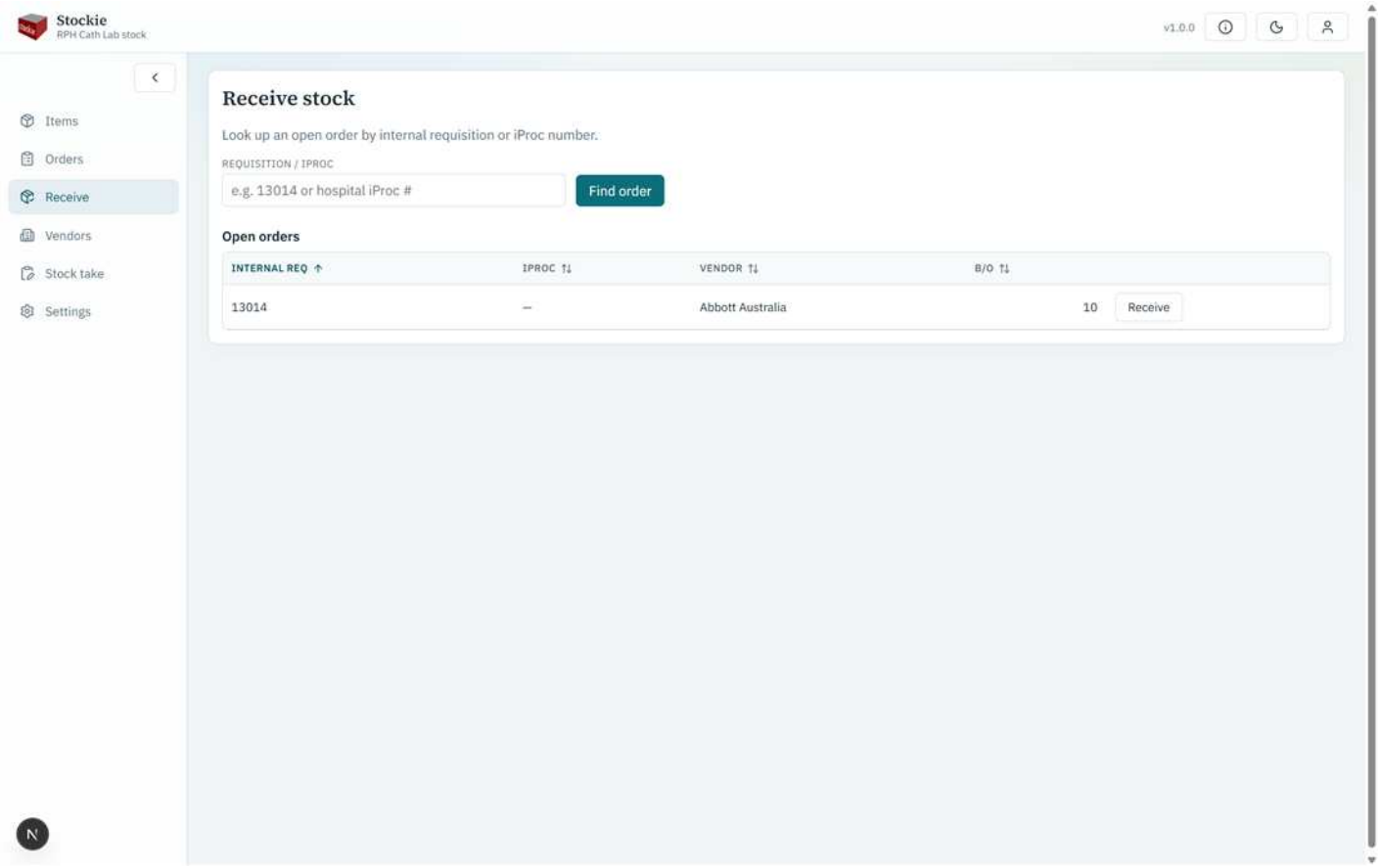
Stockie does not call Oracle. Recording iProc lets colleagues look up the order later by either the internal req no or the hospital number when receiving.

Receive

Receive stock

Receive stock

Use **Receive** in the side menu when a delivery arrives.

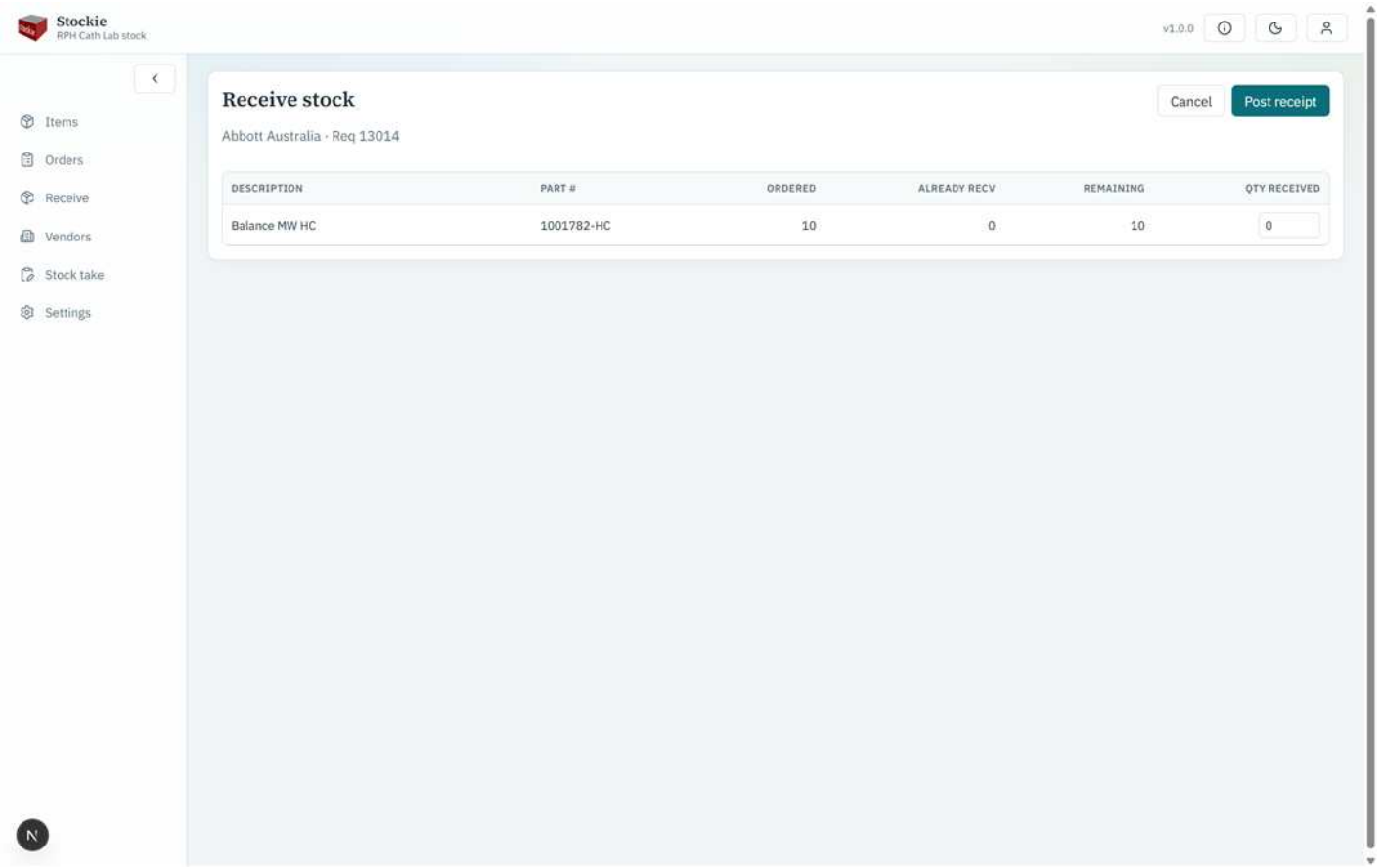


Look up by internal req or iProc; open orders listed below

Lookup

Enter the **internal req no** or the **iProc** number and continue. You can also pick an open order from the list on the page.

Entering quantities



Enter received quantities per line

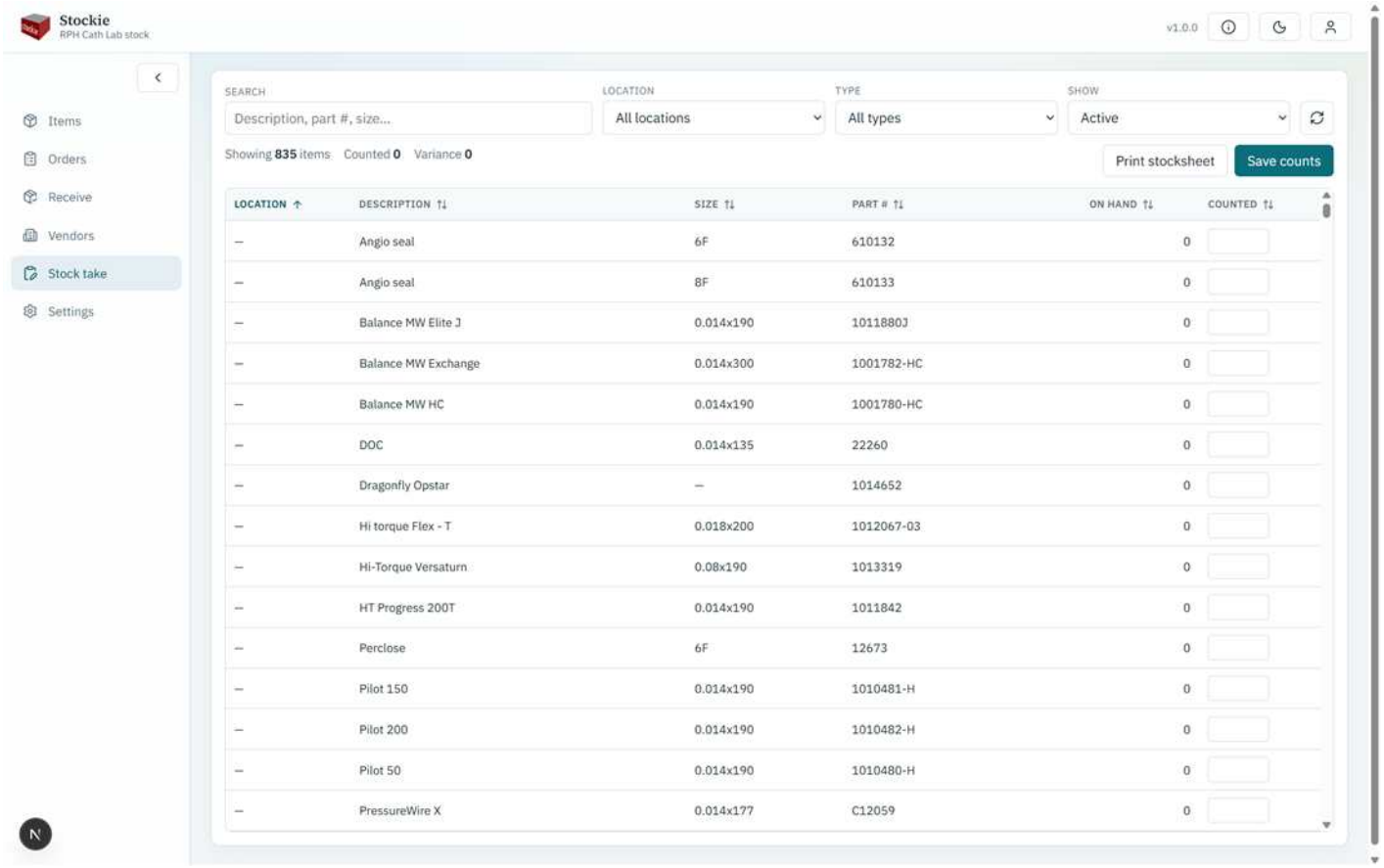
- Enter how many arrived on each line. Partial receipts are allowed.
- Remaining quantity stays on back order until later receives.
- On-hand increases by the received amount.
- When everything is received, the order can close; otherwise receive again when the rest arrives.

Stock take

Stock take

Stock take

Stock take is a dedicated screen (not started from Items as in the old Windows app).



Count against the catalogue and save

1. Filter or search to the area you are counting (type, location, active items).
2. Enter the counted quantity for each item.
3. Save. With write access, on-hand is updated to the counted values.

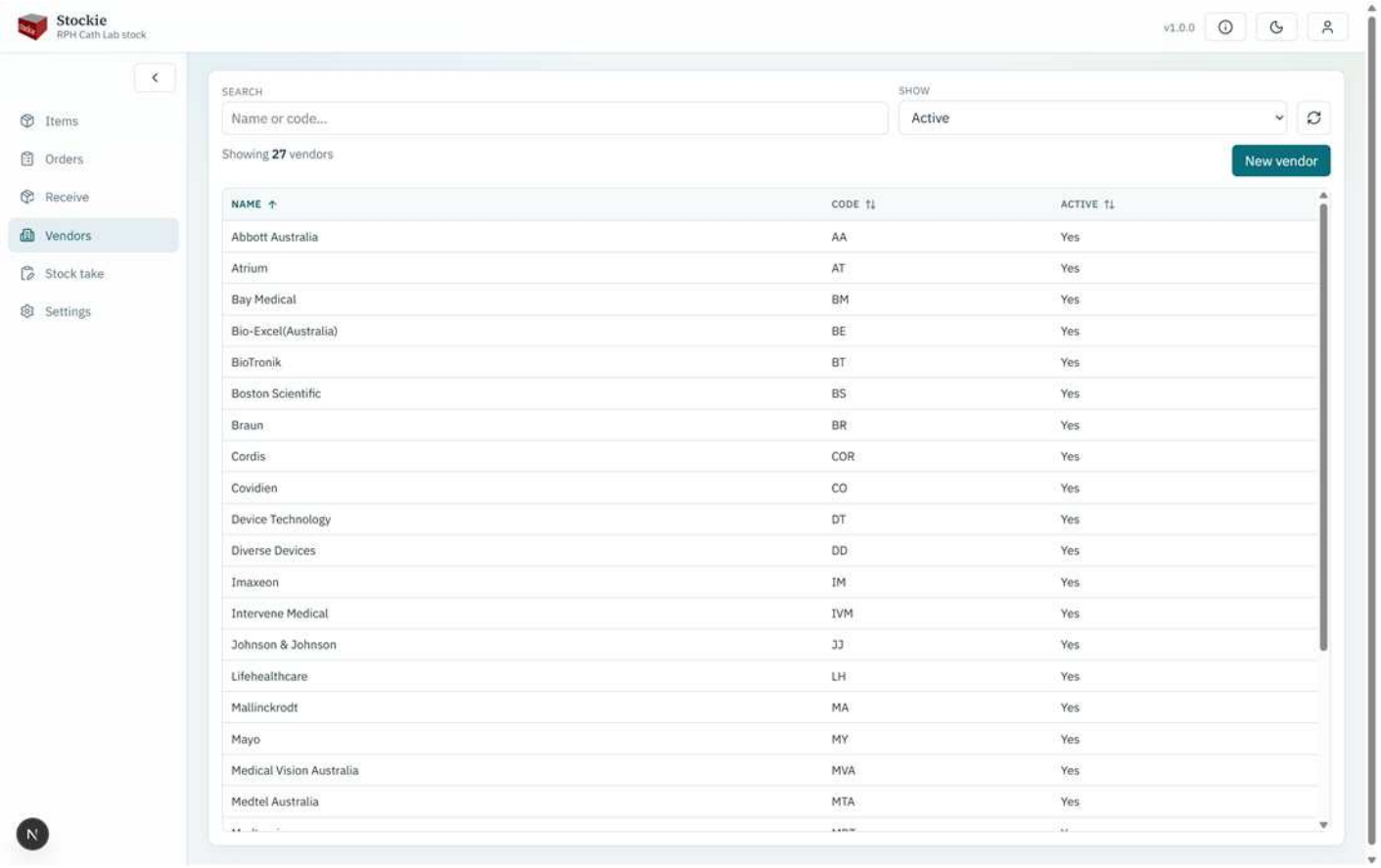
Readers can view the list but cannot save counts.

Vendors

Vendors

Vendors

Vendors supply the catalogue and drive the split when you create orders (one PO per vendor).



Vendors list

- Filter active / inactive / all.
- Create or edit a vendor (name, code, active). If code is left blank, Stockie can generate one.

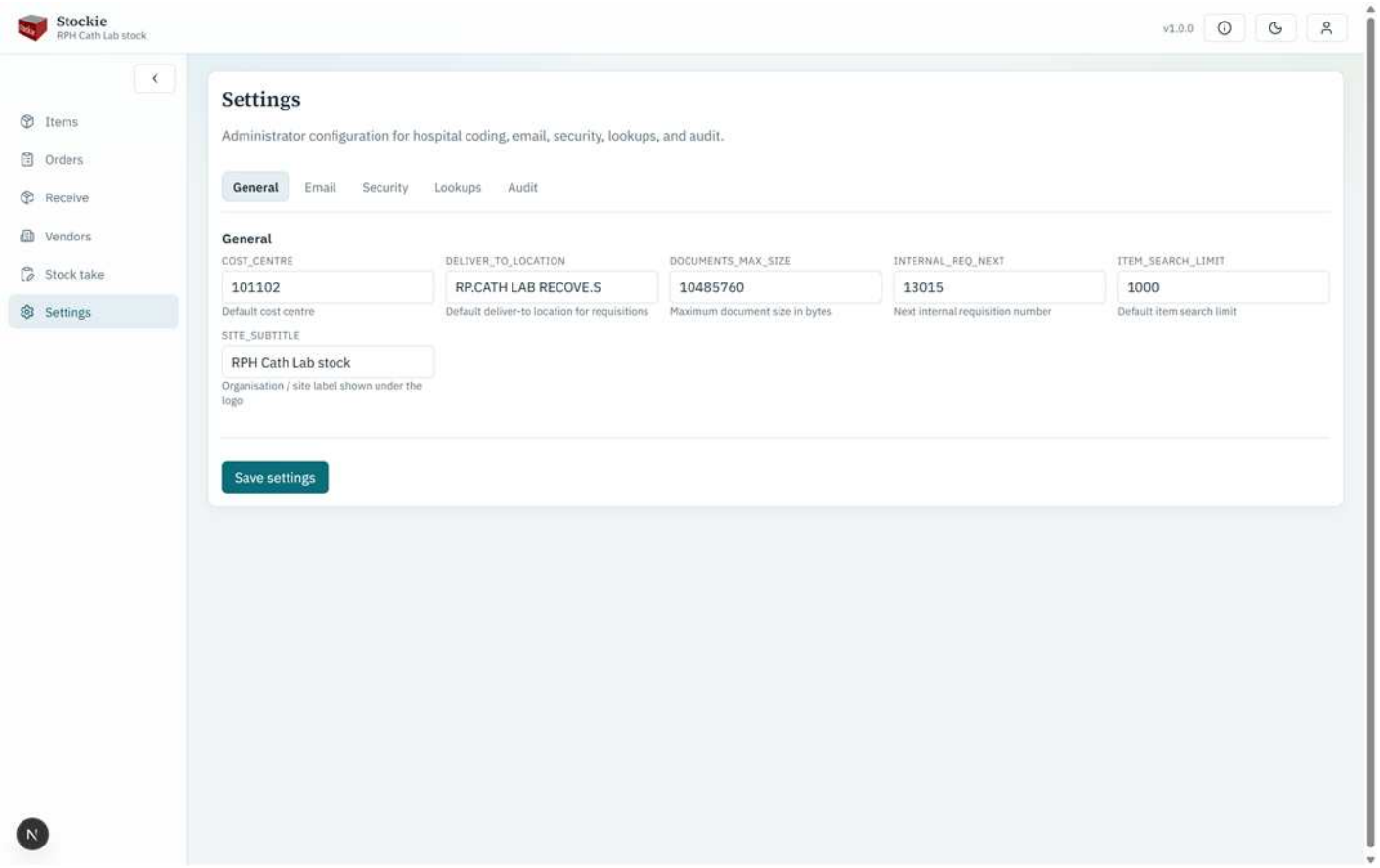
This web version does not include vendor communication logs or a vendor document library.

Settings

Settings

Settings

Settings is visible only to administrators. Use it for general settings, email, security, lookups, and audit



General settings — site subtitle and hospital coding

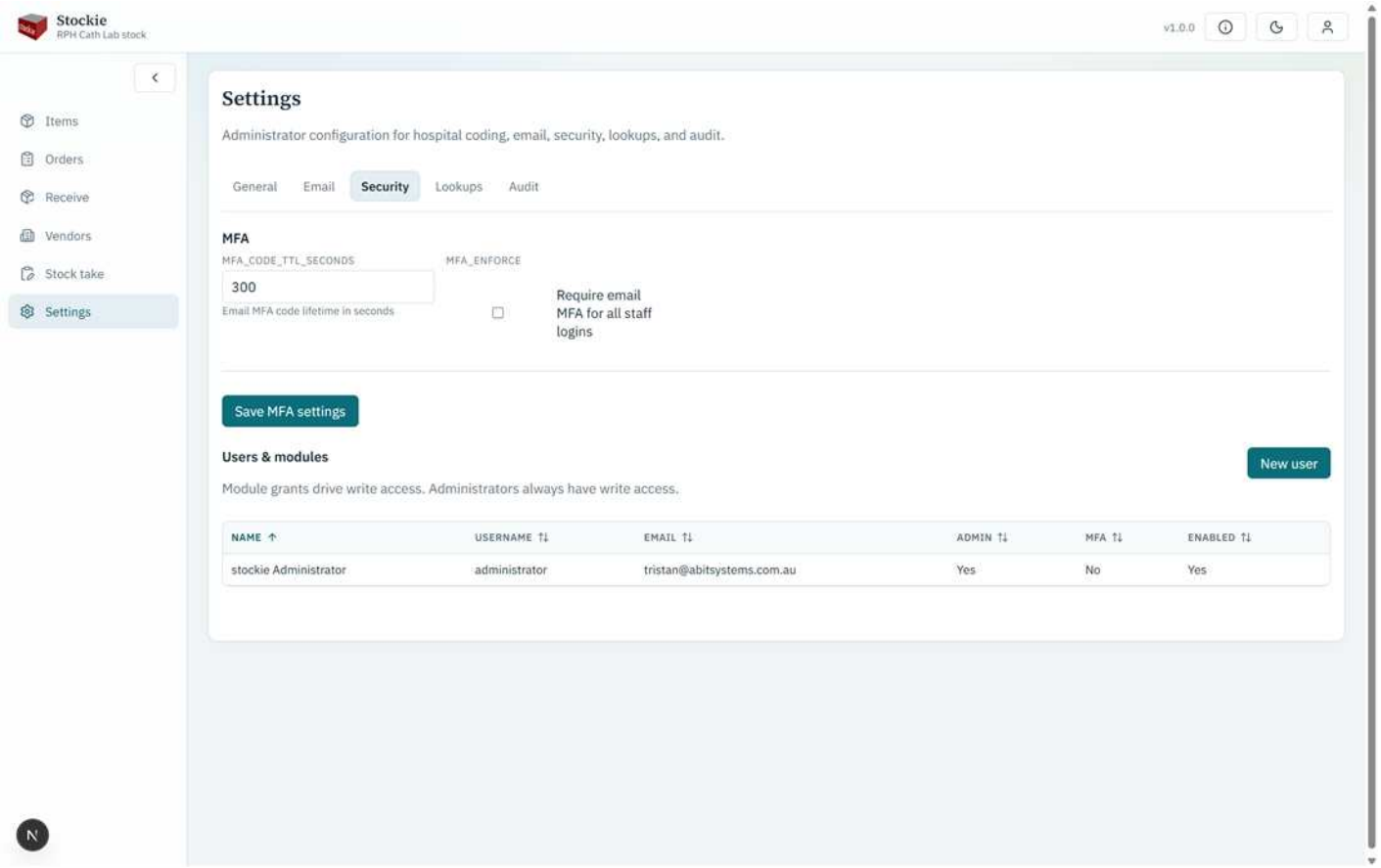
General

Site subtitle (shown in the shell), deliver-to, cost centre, next internal requisition number, and related coding used when creating orders.

Email

SMTP settings for MFA and system mail, plus a test send.

Security



Security — MFA and users

Site MFA options, staff users, passwords/enablement, and module write grants.

Lookups

Maintain item types and locations used on the catalogue.

Audit

Review system audit entries (who changed what). This replaces a separate “History” menu from the old Windows product.