

# Overview of MaxIMS Inventory Management provided by EDI Plus Limited

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## Document Control

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## **1. Introduction**

This document introduces the collaborative Inventory Management service provided by EDI Plus Limited. It incorporates a summary of our credentials, a view of the wider services we offer and, importantly, provides a high-level description of the MaxIMS service, along with extracts from Case Studies provided by long-term users of the service.

We hope you find this initial document of interest and we look forward to working with you to understand more about your specific requirements so that we can adapt and implement our MaxIMS service to be fully compliant with your requirements. We would encourage you to contact us so that we can demonstrate the full capabilities of MaxIMS.

To arrange a more detailed discussion, or if you have any queries relating to the document, please contact Paul O'Sullivan of EDI Plus Limited.

## 2. EDI Plus Limited Credentials

EDI Plus Limited provide a series of potentially interlinked data management services from our offices in Plymouth. These services include all forms of Electronic Data Interchange (EDI), automated Invoice Approval processes (Didos), specialised printing processes and, as detailed in this document, our MaxIMS service.

We are experts in providing these services to clients in a range of business sectors, including, Retail & Wholesale, Healthcare, Hospitality Manufacturing & Distribution and Utilities. As well as being functionally comprehensive, all our services have inbuilt flexibility so that they can be easily and safely adapted to the specific needs of our clients.

Our reputation for excellence has been built over many years, working with a number of prestigious and high-profile clients. We are keen to protect and enhance the client's reputation and maintain full client discretion when publicising our relationships.

Organisations using one or more of our EDI Services include:



We are a profitable and growing business, with a dedicated workforce incorporating many years of experience in the provision of services to a wide variety of environments. We specialise in continuing to enhance these services in line with the changing business needs of our clients. Of paramount importance in this pursuit is the provision of a cost-effective, reliable and adaptable service which ensures the longevity of our commercial relationships.

### 3. Overview of MaxIMS Functionality

#### 3.1 Process Summary

MaxIMS is a fully functional Stock management system which monitors and maintains appropriate local stock levels across individual organisations or selected departments/environments of an organisation. It is a hosted and administrated web application which provides inventory management facilities using internet browser access combined with local smart devices which exchange data with the central system.

MaxIMS was originally developed over 10 years ago in conjunction with a multinational pharmaceutical organisation and implemented across numerous laboratories in which their equipment and processes are used for various testing and diagnostic purposes under laboratory conditions. The critical nature of these requirements provides MaxIMS with a secure and fully reliable pedigree for stock management within the specific environment of the Healthcare sector.

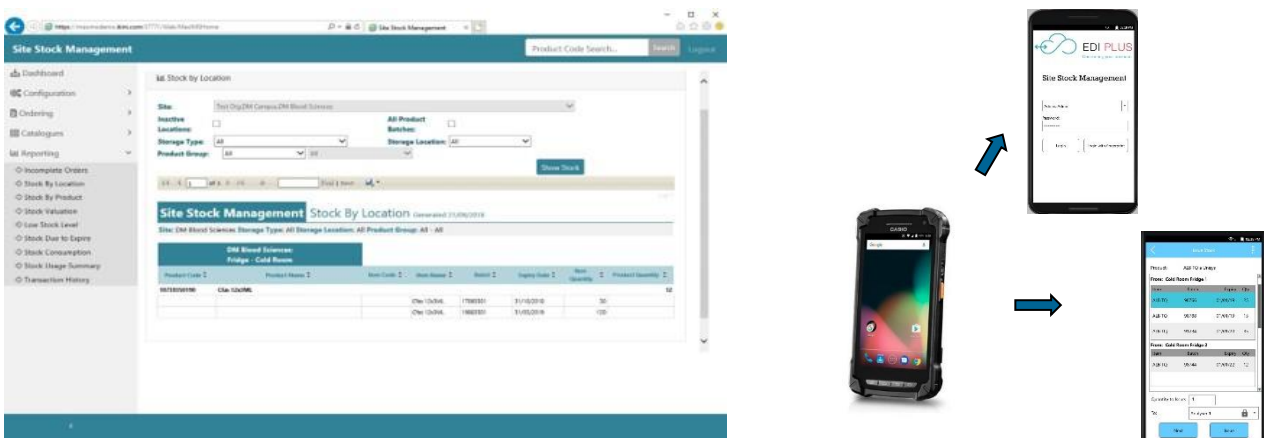
Different barcodes can be used to identify individual products, including both 1D and 2D barcodes.

Continuous improvement, including the ability to use Smart Phones as well as the original Handheld devices, means that MaxIMS is a reliable service to be applied within all areas of Healthcare.

#### 3.2 Equipment

MaxIMS processes are based on a central website supported by mobile devices. Importantly, the mobile devices can operate successfully even where no internet connections are available – e.g. in walk-in refrigeration units – as updates can be stored within the devices until the central process is again available.

The processes work with Handheld Terminal, Android mobile phones and, most recently, with iOS Mobile Phones. Handheld terminals use the inbuilt Barcode Scanner, while Mobile Phones use their camera facilities to pick up the barcodes.



### 3.3 Ordering Stock

The Stock Ordering process comprises the following features:

Suggested Orders are generated to restock products to predefined maximum stock levels. The individual products can be selected from verified and approved vendor catalogues if required.

An Automatic Replenishment option allows all products that require replenishment to be listed, with a single-button confirmation to activate the appropriate orders.

Where long lead-times are a factor, future expiry dates can be included in the ordering process to enable early identification of stock that is due to expire.

Order quantities can be amended as required to plan for seasonal patterns, promotional runs, etc.

If required, replenishment stock lists can be exported to other processes (usually via Excel) so that existing ordering processes can continue to be used.

### 3.4 Receipting Stock

When receipting stock, the service operates as follows:

Suppliers' electronic delivery notes can be imported to enable the rapid and fully accurate population of delivery details, including specialised factors such as Lot Numbers and Expiry Dates.

Where suppliers are able to send Advanced Shipping Notes (ASNs) these enable early notification of the goods to be delivered.

Where electronic delivery notes or ASNs are not available, the mobile devices can be used to easily receive the delivered stock.

Automatic storage assignment enables stock to be instantly registered in the specific locations that are set up for individual products or product types.

### 3.5 Issuing Stock

Mobile devices are used to record stock usage quickly and easily. Staff will be encouraged to always use this methodology in order to maintain accurate stock records and to achieve appropriate levels of inter-dependence within a teamwork structure. For 'locked cabinet' stock, this can be fully mandated.

Multiple points of consumption can be identified where appropriate, recording these different points to provide accurate stock consumption reporting.

Specific configuration options support the Stock Issue process, including the identification of 'sister' sites, multiple storage locations sites, and precisely where and/or to whom stock is issued.

### 3.6 Stock Checks

Stock levels in all assigned locations can be checked using the central website User Interface, with real-time reports showing individual product details, storage locations and usage. Reporting on Low or Excess Stock can be provided, along with appropriate alerts when stock is issued or receipted. Separate reports showing expired or expiring stock can also be provided.

Stock reports can be easily exported in a variety of formats for use in other systems.

Full stocktakes can be undertaken, adjusting stock levels where necessary to ensure accuracy, using either the central website User Interface or the mobile device.

### 3.7 Vendor Management Option

MaxIMS supports vendor management relationships with suppliers whereby suppliers are given responsibility for ensuring appropriate stock levels are maintained. This is achieved using the same functionality as is described above, but with the suppliers given a 'window' into real-time stock levels so that they can be responsible for appropriate replenishment schedules.

### 3.8 Reporting

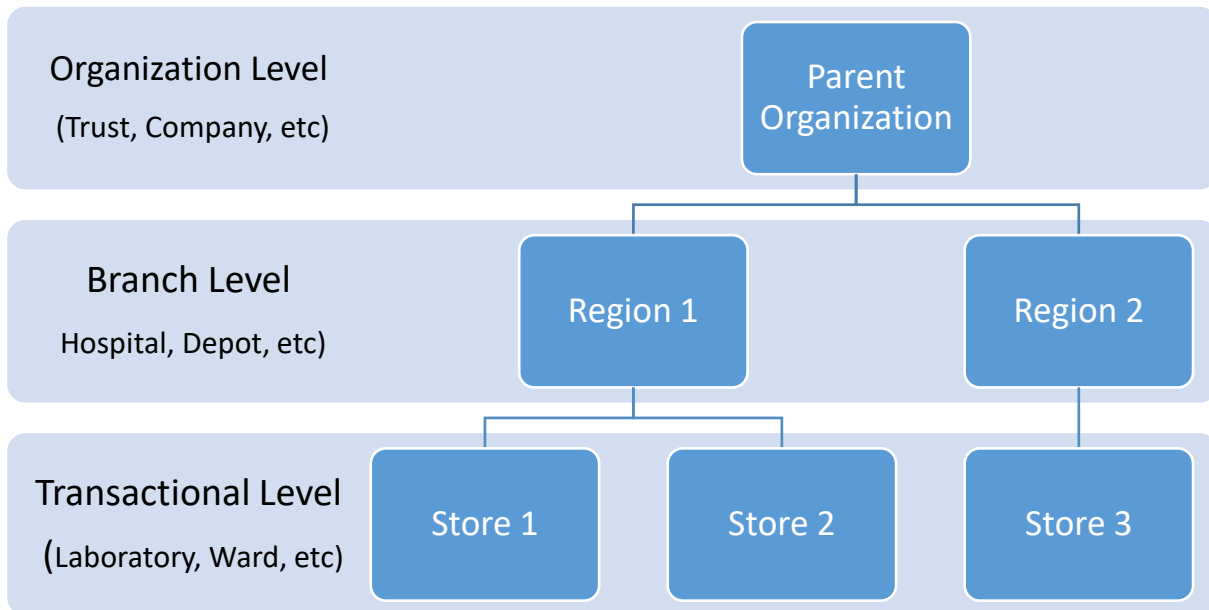
In addition to the reporting processes outlined on Section 3.6, a series of standard reports, include Current Stock Levels, Low Stock warnings, Stock valuations and usage history.

One of the most useful reports is the Transaction History which gives users a searchable and detailed transaction record of every action performed against their system – in effect a searchable audit history which can identify selected transactions, potentially going back to the point of implementation.

And, of course, daily activities can be reported, including delivery/receipting details and other forms of stock movement such as return to vendor and where stock has been destroyed.

### 3.9 System Management & Typical Structure

The following provides an overview of how MaxIMS can be integrated with the specific structure of different organisations:



Each Store has its own logon criteria. Therefore, individual users can log in at their appropriate Store and are restricted to that level, whilst 'Superusers' can log in at the Organization or Branch level and view all the levels below.

Organizations can be arranged based upon the required hierarchy size, covering numerous Branch (optional) and Store configurations.

In the example shown:

- Store 1 and Store 2 can transfer stock between each other.
- Store 3 has no sibling sites to transfer to (as it belongs to Region 2)
- Each Store has their own configurable number of storage locations and points of consumption
- All transactions (usage, deliveries, stock levels, ordering etc.) are carried out at Store level
- Users of Region 1 can run reports against Store 1 and Store 2
- Users of the Parent Organization can run reports against Store 1, Store 2 and Store 3
- Store 1 Administrator users can add / remove / manage / view users of Store 1 only.

#### 4. Customer Experiences

MaxIMS has been running in large number of NHS Trusts in the UK for over 10 years – often in multiple departments within those Trusts. The service has also been implemented in a number of Healthcare facilities in Europe, including in Norway, Sweden, Finland and Austria. Inevitably therefore, it has built up an excellent reputation for the effectiveness and efficiency of its stock management capabilities.

Although client confidentiality prevents us from providing detailed Case Studies, here are a few details relating to experience of using the service:

##### **Scarborough District General Hospital Pathology Laboratory.**

Scarborough invested in the system as a means of both cutting the time spent in manually recording reagent stock movement and improving the pathology laboratory's data quality and transparency.

The savings achieved have been quantified as follows:

"From typically taking our technician up to 1 hour per day to manage all elements of our reagent stock, we can now do all of that and more in around 5 minutes. I would never ever want to return to a manual system."

Scarborough is a busy pathology laboratory and, in common with other NHS institutions, is under pressure to deliver efficiency savings whilst maintaining quality standards. As an organisation, they are fully convinced of the positive role the system plays for them in this regard.

The efficiency improvements were gained immediately following implementation. Time spent with stock reagent management was reduced immediately the technician had completed training and used the system properly. The reporting suite which enable detailed reviews of stock usage etc would never have been possible with their old manual system given the time available.

Stock wastage has been difficult to quantify accurately, principally because they did not previously record and account for stock loss due to wastage, but this area in particular has improved substantially.

##### **Royal Preston Hospital Pathology Laboratory**

In terms of stock checking in, there has been no real change as goods still need storing in date order ready to be used. However, the principal advantage has been in the process of the recording of goods in. Previously this activity took a technician around 1 hour per week, but this has been reduced to between 1 minute and 10 minutes, depending on the content of the goods received. For many of these deliveries, the laboratory receives an electronic receipt, whilst other suppliers may need batch numbers and date details to be keyed manually into the system and confirmed.

Recording of goods consumed used to take over 2 hours per week, but this has been reduced to less than 45 minutes. Most stock can be issued via bar code scanner although a small amount of stock needs to be manually booked out.



There is also an efficiency with determining which goods to order and in what quantities. Following implementation, the staff have reduced this to no more than 10 minutes per week from 60 minutes and regard it as very accurate. This is because all staff have 'bought into' the imperative of keeping stock records up to date so that the system data is reliable.

Finally, because the creation of stock reports and data trends was never done due to the length of time it would take, it is very easy to track patterns of usage, movement between lot number and available stock levels. This provides an enormous sense of reassurance and confidence for all laboratory staff.