

EPIC TRAINING



Review Inventory Item Information Quick Start Guide

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Review Usage Information for an Inventory Item

Reviewing historical usage information can help you:

- Determine whether inventory is being reordered with the right frequency and quantity.
- Determine whether inventory is stocked at appropriate levels in various locations.
- Identify and predict usage trends.

To see usage information for a specific inventory item:

1. Open the **Inventory** activity for any location.
2. Click  **Inventory Item Report** and select the inventory item you're looking for. By default, the report shows usage information for the inventory location you selected.
 - a. Click **Add Location** to include data for other locations.
 - b. Click  next to a location name to remove the location.
3. Optionally, filter the data that appears in the report using the following fields in the **Usage section**:
 - **Daily usage by:** Select actions, such as **Dispense** or **Received**, to show usage data only for those actions.
 - **For the last:** Select the number of months for which usage data appears.
 - **Averaged over every __ days:** Click the  and  icons to adjust the number of days over which usage data is averaged.

Review Par and Optimum Levels

Defining appropriate par and optimum levels for each inventory item is the key to successful inventory management. The system periodically calculates these levels based on historical usage data.

You can review these calculated levels in a few different ways.

If you want to review levels for a specific inventory location, open that location and click  **Adjust Par Levels**. In this activity, you can review every balance for which the system has suggested a different par or optimum level. If you want to take the same action on the listed items, click the **Apply to Remaining** button and select an action from the menu that appears.

If you want to review levels for more than one location, run a **Reporting Workbench** report to identify items



with calculated par and optimum levels that differ from the current levels by 10% or more that might need those levels adjusted.



For definitions of par and optimum levels, refer to [Understand par, critical, and optimum levels.](#)

1. Go to **Epic button > Reports > My Reports.**
2. Click the **Library** tab and hover over the name of the **Rx Inventory Balances with Calculated Levels Needing Review** report.
3. Click **▶ Run.**
4. Review the current and calculated par and optimum values for each item.
5. Select the items for which you want to set new par and optimum levels and click **⚙️ Adjust Par Levels.**



Press **Shift** to select multiple items at once, or click the **☰** button to select all items at once.

6. In the **Action** column, select one of the following values for each item:
 - Keep current – Continue using the current par and optimum levels.
 - Set manually – Set the par and optimum levels to the values you enter manually.
 - Use calculated – Set the par and optimum levels to the calculated values.



You can also select an option from the **Use Calculated** menu to select the same value for all items.

7. If you chose to set levels manually, enter values in the **New Par** and **New Optimum** columns.
8. Click **Accept.**