viedoc learning™

Viedoc Logistics User Guide

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Overview of Viedoc Logistics

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1 Introduction

Viedoc Logistics is the interface for supply managers and all users with permission to manage the Investigational Products (IP) of a study. In Viedoc Logistics you can overview and monitor your IP (kits) as well as ship, receive and return kits between the depots and the participating sites.

Allocation of kits is managed from Viedoc Clinic and the feature is fully integrated with Viedoc Logistics, meaning that kits allocated by the site staff are instantly synchronized with and visible in the stock list.

1.1 System languages

Viedoc Logistics is available in the following languages:

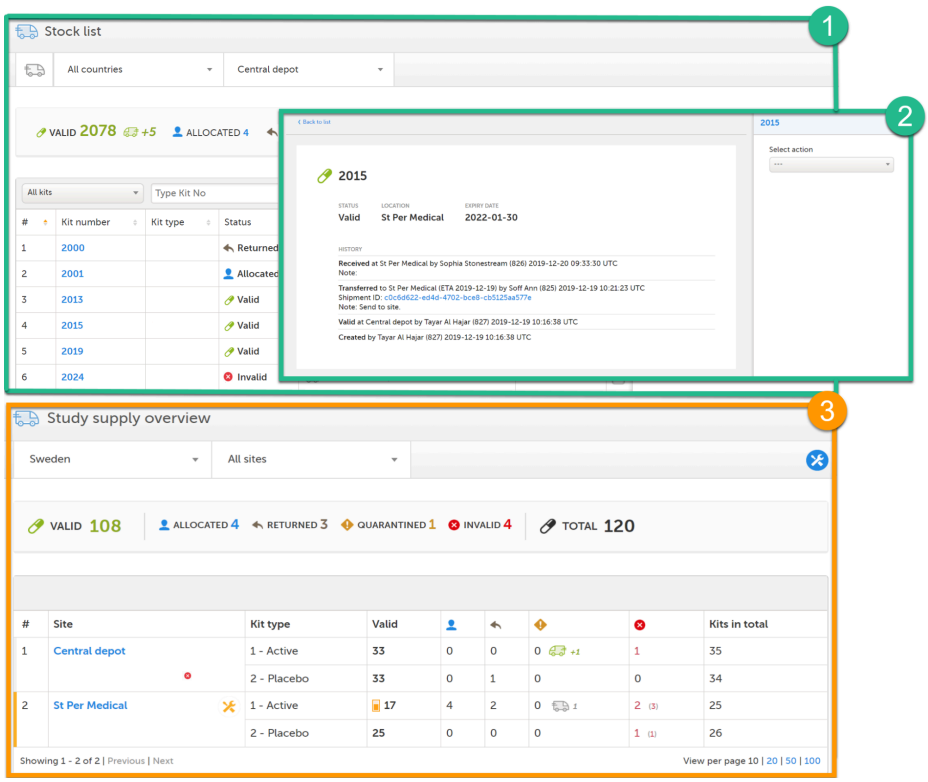
- Chinese (Simplified and Traditional)
- English
- French
- German
- Japanese
- Portuguese
- Spanish
- Swedish

1.2 Access to Viedoc Logistics

A valid license is required to use Viedoc Logistics. Access is then given by a Study Manager or a Site Manager who invites the user to the study. For information on how to log in to Viedoc Logistics, see Launching Viedoc Logistics.

1.3 Overview of the interface

Viedoc Logistics consists of the following pages: Stock list (1), kit details view (2) and Study supply overview (3). The Study supply overview is only accessible for users with permission to manage kits on study level, this is also the landing page for those users. See Main functions below to read more about the interface.



1.4 Scope of allocation

The scope of the allocation determines what depots and sites are enabled and used in Viedoc Logistics. The scope can be set to study, country or site level which is reflected in the interface as the available locations. Allocation of kits is also dependent on the scope, see section *Scope of allocation* in lesson Managing kits.

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2 User roles

The user roles of Viedoc Logistics are configurable and the permission settings can be adjusted according to your study needs. There are two default roles:

- Site Supply Manager - for managing kits on site level
- Study Supply Manager - for managing kits on study level

Your permission settings determine what depots, sites and features are available to you. Usually, the Study Supply Manager monitors the supply for the whole study and transfers kits from the central depot to the participating (country) depots and sites. The Site Supply Manager usually manages the individual kits at the clinic (site).

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3 Main functions

The following table summarizes the main functions of Viedoc Logistics:

Page	Main functions	Accessible for users managing kits	Covered by lessons
Stock list	Transfer kits between depots and sites Set status to kits Track kits and shipments	On site level (landing page) On study level	Stock list and kit details view Kit status Managing kits Tracking shipments
Kit details view	View audit trail of a kit Set status to a kit View shipment ID of a kit		

Page	Main functions	Accessible for users managing kits	Covered by lessons
Study supply overview	Overview and monitor the study supply Set thresholds (alerts) for when kits are low in stock and define expiry period	On study level (landing page)	Study supply overview Setting low supply alerts

4 Terminology

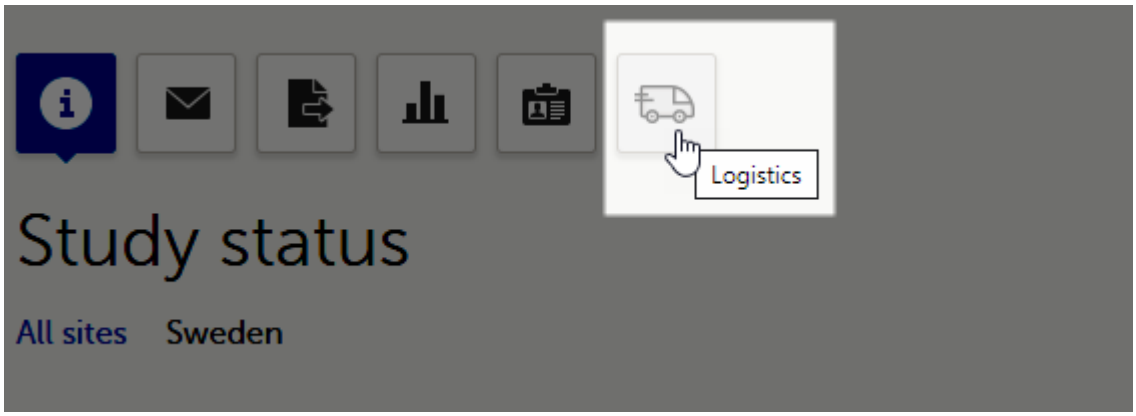
For more terms, see our Glossary.

Action	The activity that changes the kit status or location: Transfer - Receive - Cancel - Return - Invalidate - Quarantine - Restore - Edit expiry date
Central depot	The main supply depot of a study from where all kits are distributed.
Country depot	If the study is conducted in several countries, a country depot can be used as a distribution central to the sites within those countries.
ETA	Estimated Time of Arrival. The estimated day that a kit will arrive to destination when performing a transfer. The date is optionally added to the transfer and will be visible in the stock list and saved in the audit trail.
Global allocation list	The list of kits that is imported into Viedoc Logistics and constitutes the stock list in the Stock list page.
IP	Investigational Product. In Viedoc this is commonly named as kit.
Kit	The investigational product of a study.
Site supply manager	Default role for users managing kits on site level.
Shipment ID	The identification number that is created for each shipment. That is, for every transfer action a shipment ID is created and associated with the transfer.
Stock list	The stock list is the list of kits visible in the Stock list page, which is based on the global allocation list. The Stock list page is the landing page for site supply users.
Study supply manager	Default role for users managing kits on study level.
Study supply overview	The landing page for study supply users and interface for monitoring the study supply.

Launching Viedoc Logistics

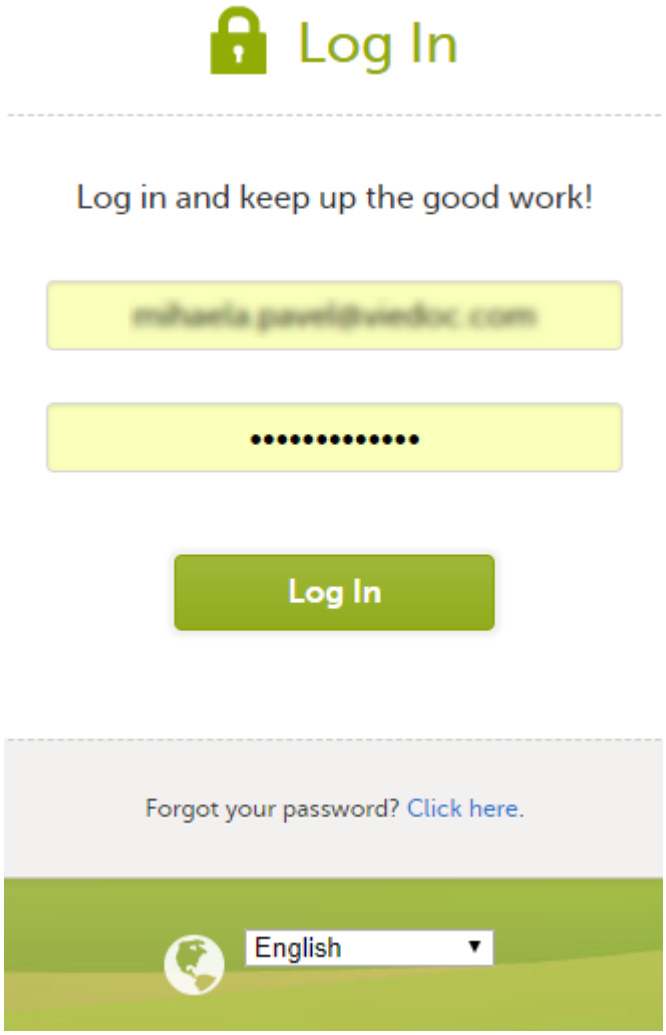
Published by Viedoc System 2020-04-23

Viedoc Logistics is launched from the landing page. If you have access to Viedoc Logistics, the truck icon is visible next to the other features you have access to in the study start page:



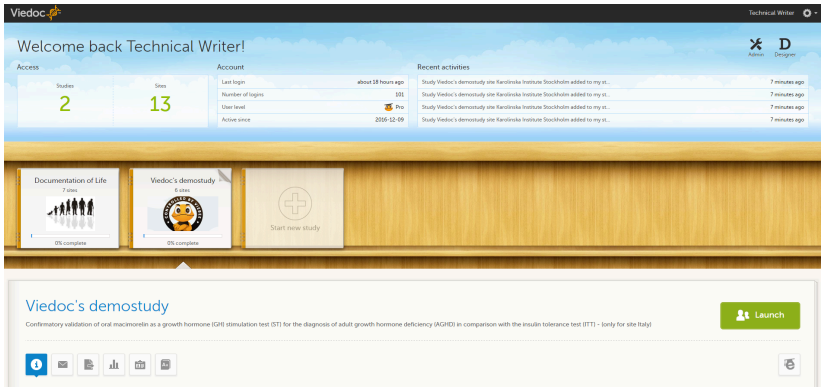
To launch Viedoc Logistics:

1 Log in to Viedoc:

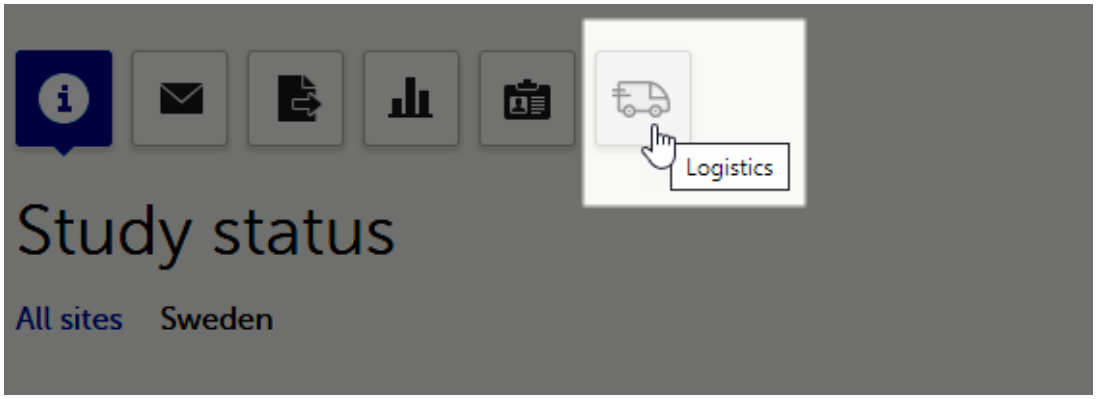


For more information, see Managing your Viedoc account.

2 Select the study to work with in the bookshelf:

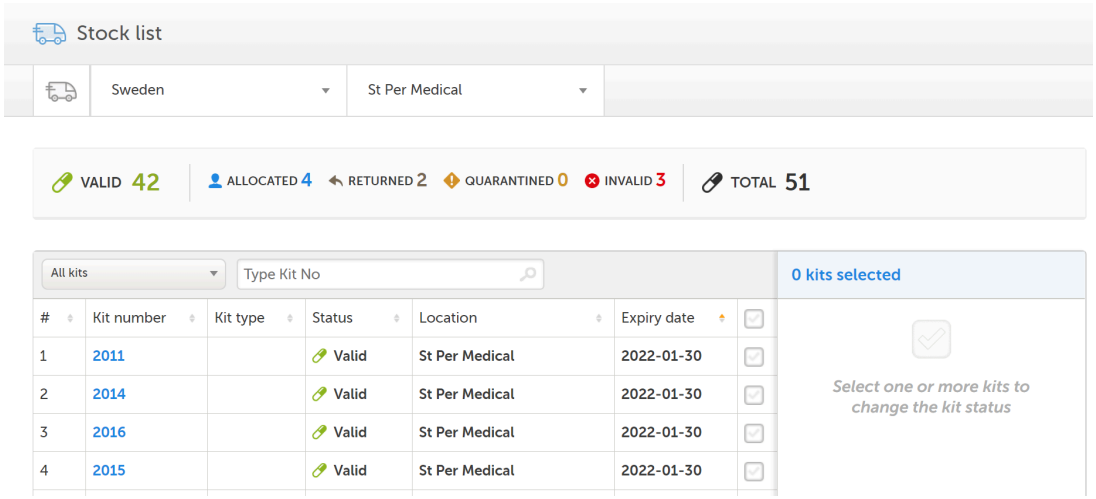


3 Click the truck icon in the study start page:

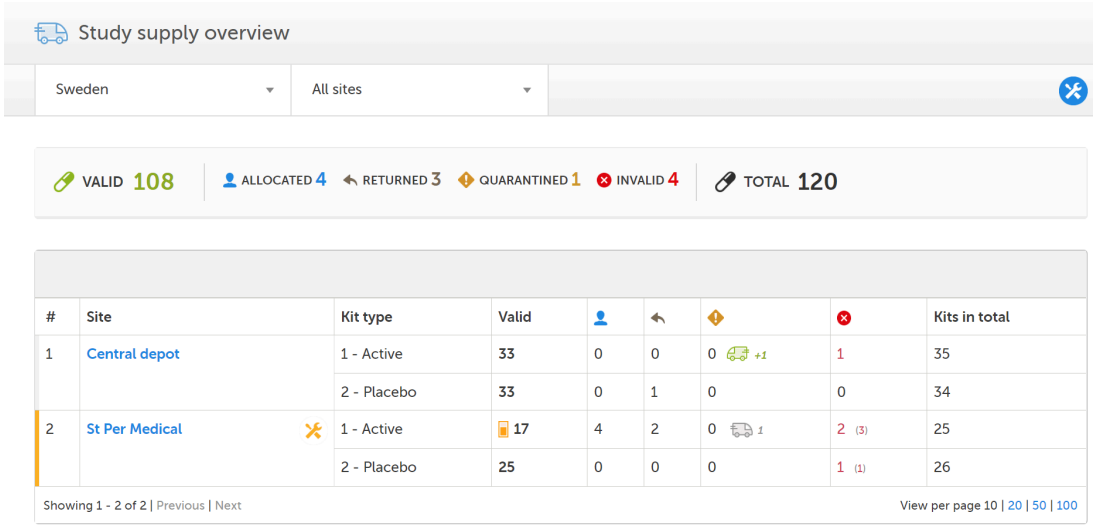


Depending on your role, one of the following pages of Viedoc Logistics will launch:

- Stock list page - for users with permission to manage kits on site level



- Study supply overview - for users with permission to manage kits on study level



Stock list and kit details view

Stock list and Kit details view

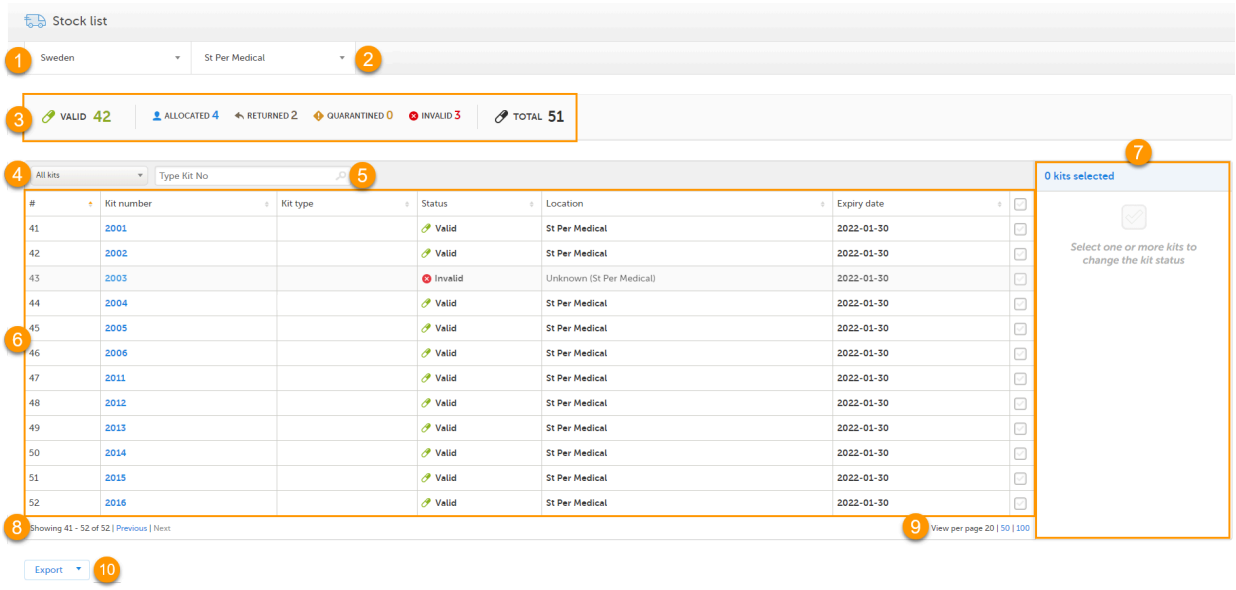
Published by Viedoc System 2020-10-06

1. Introduction
2. Overview
    2.1 Truck icon
3. Kit details
4. Export
    4.2 File structure

1 Introduction

The Stock list page is the landing page for users with site level permissions. Users with study level permissions can also access the Stock list page from the Study supply overview. See Study supply overview for more information.

2 Overview



In the Stock list page, you find the following functions:

1. Filter the stock list on country. The countries you have access to are listed in the drop-down list.
2. Filter the stock list on site. The sites you have access to are listed in the drop-down list.
3. Metrics pane showing the number of kits based on the selected country and site filters.
The green truck icon with a plus symbol indicates the number of valid kits that are incoming to the filtered locations. If no location filter is set, the total number of kits in transit are shown (**All countries/All sites**).
4. Filter the stock list on kit status in the drop-down list. You can also select the filter **In transit** to show kits that are in transit, that is, kits that are shipped from a location but has not yet arrived.
5. Search the stock list for a specific kit number or Shipment ID by typing or scanning the number into the search field. Use comma to search for multiple kits at once, for example *1000,1001,1002.*
6. Stock list with columns showing the following information:

- # - list item number
- Kit number - number identifying each kit
- Kit type - only visible for users with permission to view blinded info
- Status - status of the kit (**Valid / Allocated / Returned / Quarantined / Invalid / Expired**)
- Location - location of the kit: at location or in transit (truck icon)
- Expiry date - date of when the kit expires
- Checkbox - select all kits by checking the top box, select individual kits per row, to make actions in the action pane (7)

The columns of the stock list can be sorted by clicking the small arrows:

7. Action pane, where all the kits are managed. For more information, see Managing kits.
8. Number of list items showing out of the total amount of items, click **Previous** or **Next** to browse page.
9. Select the number of kits per page to be shown.
10. Export the stock list, see Export.

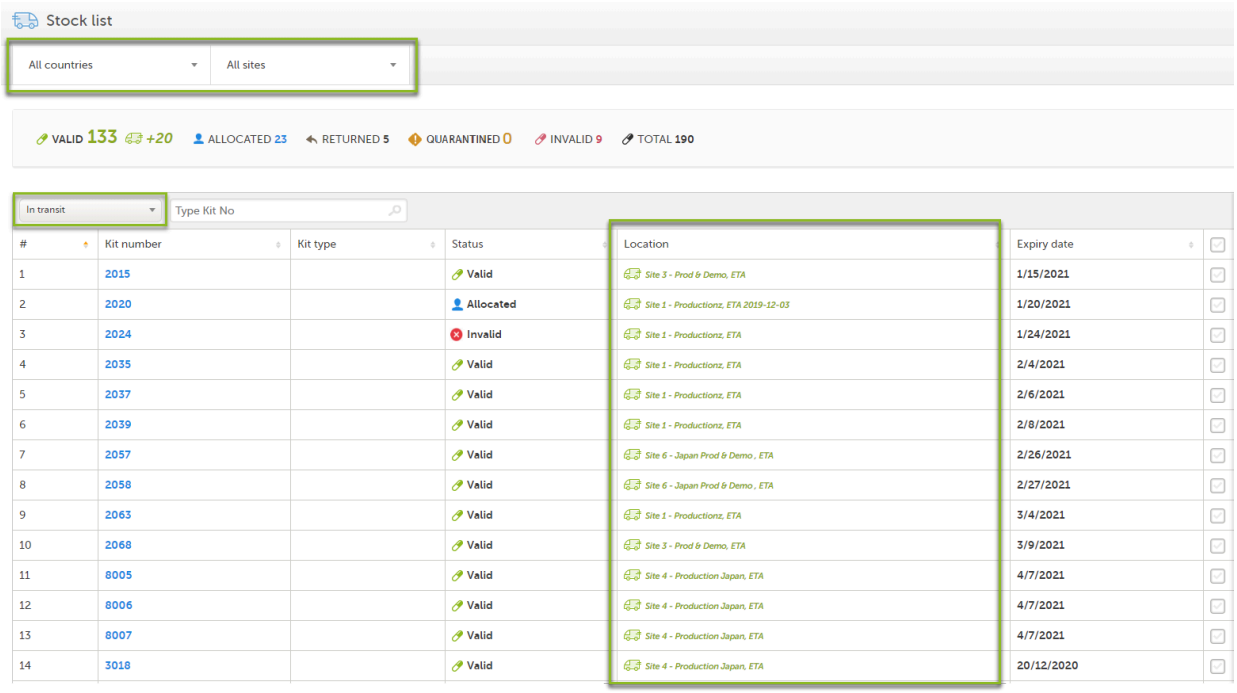
2.1 Truck icon

The truck icon represents kits that are in transit:

A green truck icon with a destination next to it indicates incoming kits to the filtered location.

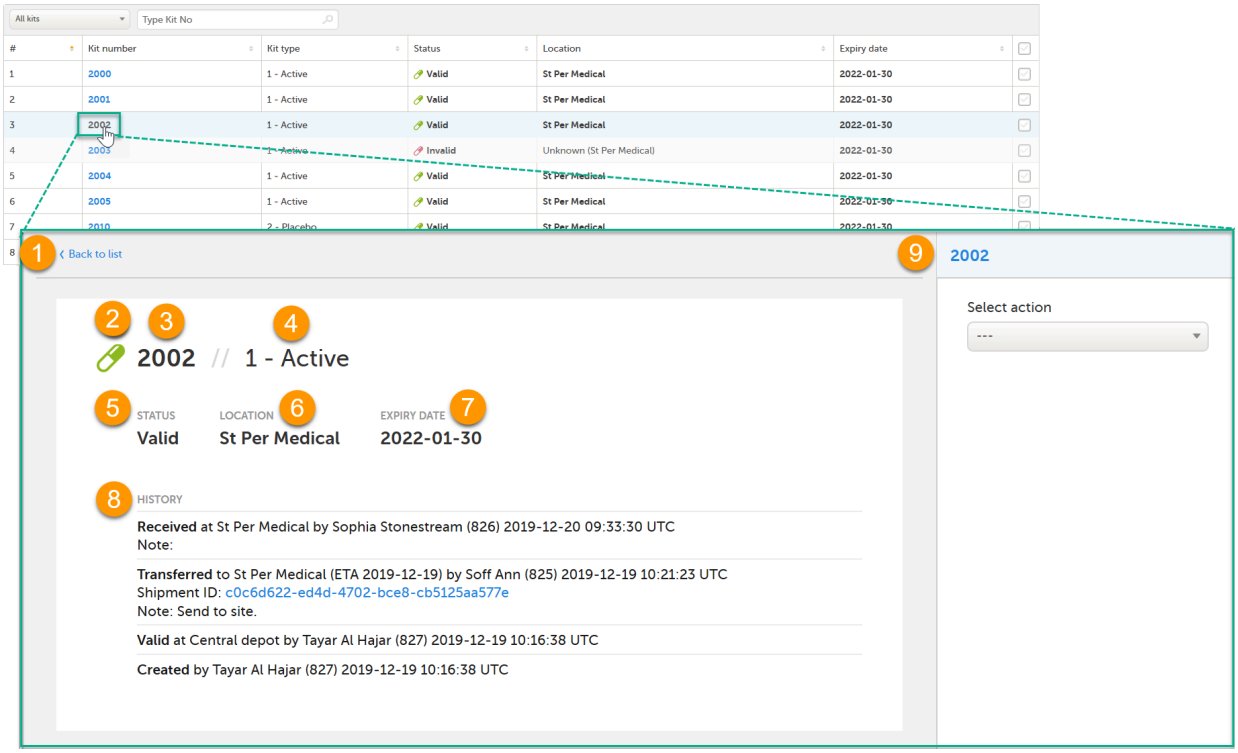
A grey truck with a destination next to it indicates outgoing kits from the filtered location.

Note! If no location filter is set, kits in transit are shown as incoming to the respective site.



3 Kit details

When you click on a kit in the **Kit number** column, the Kit details view opens:



In the Kit details view, you find the following functions:

1. Clickable link - click **Back to list** to go back to the Stock list page
2. Symbol reflecting the status of the kit. See Kit status for more information.
3. Kit number
4. Kit type - only visible for users with permission to view blinded info
5. Kit status
6. Location
7. Expiry date
8. History showing the audit trail of the kit. All actions performed to the kit are saved with information about when and by whom the action was done. The system automatically registers **User action** for the following actions: *Transfer, Recieve, Cancel, Return*. Any notes added to those actions are also registered. If the transfer action was performed to the kit, then the related Shipment ID is listed, as a clickable link. For more information, see Tracking shipments. For the actions *Quarantine, Restore, Invalidate, Edit expiry date,* the mandatory reason entered by the user is registered.
9. Action pane for managing the kit. For more information, see Managing kits.

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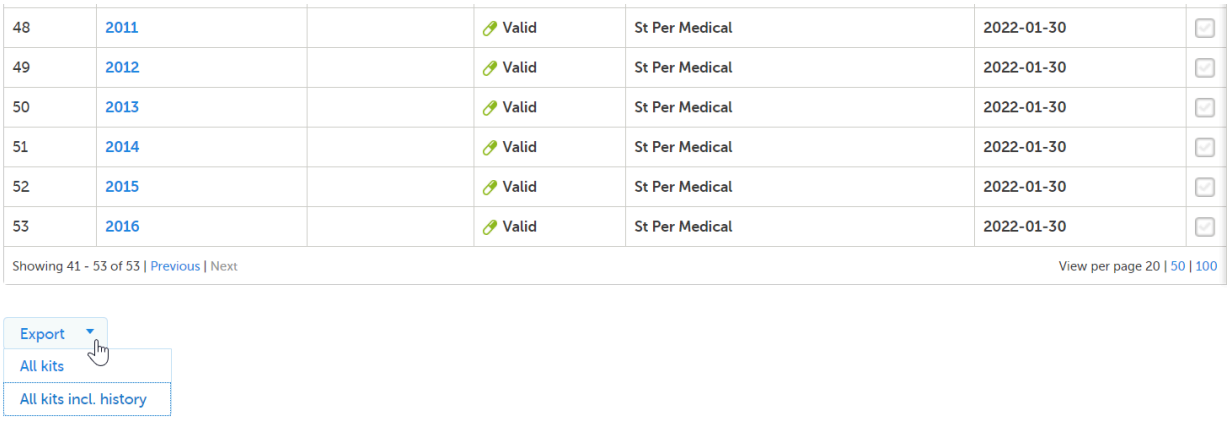
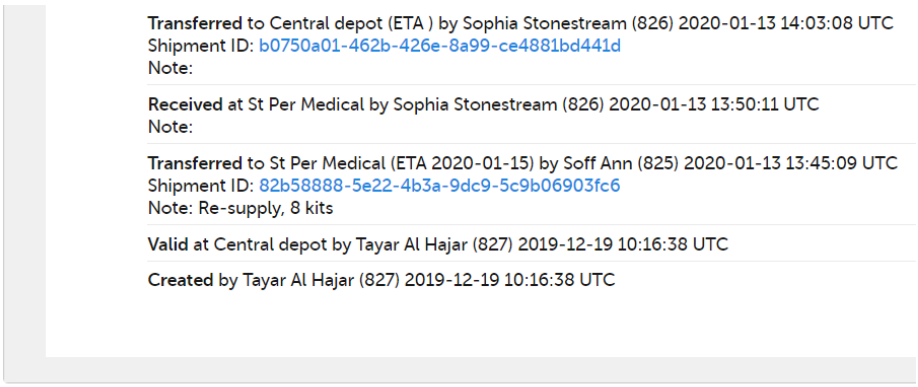
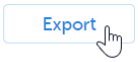
4 Export

At the bottom left of the Stock list page, there is an option to export the stock list into an Excel file. The export is based on the current filter on Country and Site. All kits on all pages are included in the export.



The export option is also accessible from the Kit details view:

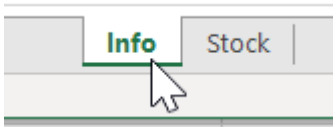




Selecting All kits generates a basic reflection of the stock list with all kits in their current kit status.
Selecting All kits incl. history generates a detailed file with all kits and their complete history records.
Selecting Export in the Kit details view generates a file with a history record of the selected kit.

4.1 File structure

The Excel export contains the following sheets:



- **Info** - showing which user made the export at what date and time
- **Stock** - showing the exported data

Depending on the type of export, the following information is listed in the **Stock** sheet:

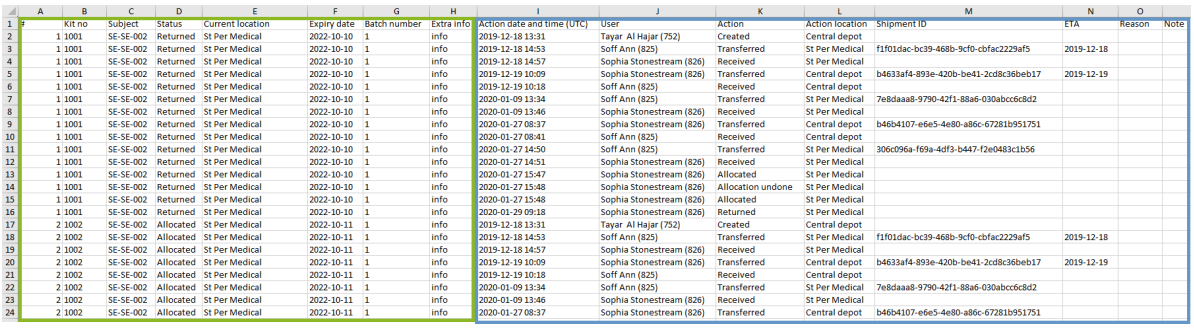
All kits export:

- **#** - list item
- **Kit no** - kit number
- **Kit type** - type of kit treatment. This column is only visible if the user has permission to view blinded information.
- **Subject** - subject ID. This column is only visible if the user has permission to view the subject ID when allocated.
- **Status** - kit status at the time of the export
- **Current location** - kit location at the time of the export
- **Shipment ID** - ID connected to kits in transit
- **Expiry date** - date when the kit expires
- Other column - any other kit property that is part of the uploaded kit list is also included in the export

All kits incl. history export and Export from the kit details view:

- **#** - list item
- **Kit no** - kit number
- **Kit type** - type of kit treatment. This column is only visible if the user has permission to view blinded information.
- **Subject** - subject ID. This column is only visible if the user has permission to view the subject ID when allocated.
- **Status -** kit status at the time of the export
- **Current location -** kit location at the time of the export
- **Expiry date -** date when the kit expires
- **Action date and time (UTC)** - date and time when the action was performed
- **User** - name and user ID of the user that performed the action
- **Action** - action performed
- **Action location** - location where the action was performed
- **Shipment ID** - ID connected to the kits if transferred
- **ETA** - Estimated Time of Arrival entered by the user when performing the transfer
- **Reason** - data entered by the user performing an action that demanded a reason for the action
- **Note** - optional note entered by the user performing an action
- Other column - any other kit property that is part of the uploaded kit list is also included in the export

The data on the **Stock** sheet is organized as follows:



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	
1	#	kit no	Subject	Status	Current location	Expiry date	Batch number	Extra info	Action date and time (UTC)	User	Action	Action location	Shipment ID	ETA	Reason	Note
2	1	1001	SE-SE-002	Returned	St Per Medical	2022-10-10	1	info	2019-12-18 13:31	Tayar Al Hajar (752)	Created	Central depot				
3	1	1001	SE-SE-002	Returned	St Per Medical	2022-10-10	1	info	2019-12-18 14:53	Soff Ann (825)	Transferred	St Per Medical	f1f01dac-bc39-468b-9cf0-cbfac2229af5	2019-12-18		
4	1	1001	SE-SE-002	Returned	St Per Medical	2022-10-10	1	info	2019-12-18 14:57	Sophia Stonestream (826)	Received	St Per Medical				
5	1	1001	SE-SE-002	Returned	St Per Medical	2022-10-10	1	info	2019-12-19 10:09	Sophia Stonestream (826)	Transferred	Central depot	b4633af4-893e-420b-be41-2cd8c36beb17	2019-12-19		
6	1	1001	SE-SE-002	Returned	St Per Medical	2022-10-10	1	info	2019-12-19 10:18	Soff Ann (825)	Received	Central depot				
7	1	1001	SE-SE-002	Returned	St Per Medical	2022-10-10	1	info	2020-01-09 13:34	Soff Ann (825)	Transferred	St Per Medical	7e8daaa8-9790-42f1-88a6-030abcc6c8d2			
8	1	1001	SE-SE-002	Returned	St Per Medical	2022-10-10	1	info	2020-01-09 13:46	Sophia Stonestream (826)	Received	St Per Medical				
9	1	1001	SE-SE-002	Returned	St Per Medical	2022-10-10	1	info	2020-01-27 08:37	Sophia Stonestream (826)	Transferred	Central depot	b46b4107-e6e5-4e80-a86c-67281b951751			
10	1	1001	SE-SE-002	Returned	St Per Medical	2022-10-10	1	info	2020-01-27 08:41	Soff Ann (825)	Received	Central depot				
11	1	1001	SE-SE-002	Returned	St Per Medical	2022-10-10	1	info	2020-01-27 14:50	Soff Ann (825)	Transferred	St Per Medical	306c096a-f69a-4df3-b447-f2e0483c1b56			
12	1	1001	SE-SE-002	Returned	St Per Medical	2022-10-10	1	info	2020-01-27 14:51	Sophia Stonestream (826)	Received	St Per Medical				
13	1	1001	SE-SE-002	Returned	St Per Medical	2022-10-10	1	info	2020-01-27 15:47	Sophia Stonestream (826)	Allocated	St Per Medical				
14	1	1001	SE-SE-002	Returned	St Per Medical	2022-10-10	1	info	2020-01-27 15:48	Sophia Stonestream (826)	Allocation undone	St Per Medical				
15	1	1001	SE-SE-002	Returned	St Per Medical	2022-10-10	1	info	2020-01-27 15:48	Sophia Stonestream (826)	Allocated	St Per Medical				
16	1	1001	SE-SE-002	Returned	St Per Medical	2022-10-10	1	info	2020-01-29 09:18	Sophia Stonestream (826)	Returned	St Per Medical				
17	2	1002	SE-SE-002	Allocated	St Per Medical	2022-10-11	1	info	2019-12-18 13:31	Tayar Al Hajar (752)	Created	Central depot				
18	2	1002	SE-SE-002	Allocated	St Per Medical	2022-10-11	1	info	2019-12-18 14:53	Soff Ann (825)	Transferred	St Per Medical	f1f01dac-bc39-468b-9cf0-cbfac2229af5	2019-12-18		
19	2	1002	SE-SE-002	Allocated	St Per Medical	2022-10-11	1	info	2019-12-18 14:57	Sophia Stonestream (826)	Received	St Per Medical				
20	2	1002	SE-SE-002	Allocated	St Per Medical	2022-10-11	1	info	2019-12-19 10:09	Sophia Stonestream (826)	Transferred	Central depot	b4633af4-893e-420b-be41-2cd8c36beb17	2019-12-19		
21	2	1002	SE-SE-002	Allocated	St Per Medical	2022-10-11	1	info	2019-12-19 10:18	Soff Ann (825)	Received	Central depot				
22	2	1002	SE-SE-002	Allocated	St Per Medical	2022-10-11	1	info	2020-01-09 13:34	Soff Ann (825)	Transferred	St Per Medical	7e8daaa8-9790-42f1-88a6-030abcc6c8d2			
23	2	1002	SE-SE-002	Allocated	St Per Medical	2022-10-11	1	info	2020-01-09 13:46	Sophia Stonestream (826)	Received	St Per Medical				
24	2	1002	SE-SE-002	Allocated	St Per Medical	2022-10-11	1	info	2020-01-27 08:37	Sophia Stonestream (826)	Transferred	Central depot	b46b4107-e6e5-4e80-a86c-67281b951751			

Current kit data at the time of the export

Kit history data

Study supply overview

Study supply overview

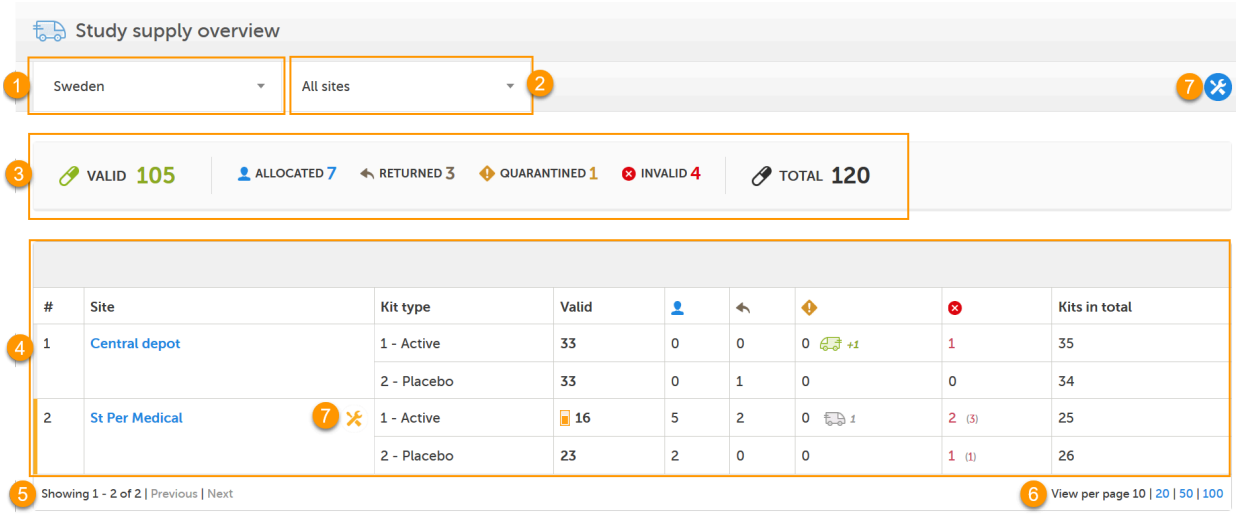
Published by Viedoc System 2020-09-09

1. Introduction
2. Overview
   2.1 Truck icon
   2.2 Access from the Stock list page

1 Introduction

The Study supply overview is the landing page for users with permission to manage kits on study level. Here, you can monitor the supply and see the accumulated number of the kits sorted on status, for each site that you have access to. To check the status of individual kits and make actions, for example transfer kits between depots and sites, simply click on a site to enter the Stock list page. See Stock list and kit details view and Managing kits for more information about handling kits.

2 Overview



In the Study supply overview, you find the following functions:

1. Filter the study supply on country. The countries you have access to are listed in the drop-down list.
2. Filter the study supply on site. The sites you have access to are listed in the drop-down list. The **Central depot** is always accessible for users that manage kits on study level.
3. Metrics pane showing the number of kits per status and the total number of kits, based on the selected country and site filters. The green truck icon with a plus symbol indicates the number of valid kits that are incoming to the filtered locations.
4. Study supply overview with columns showing the following information:

   - # - list item number
   - Site - study site name
   - Kit type - the content of the kit (blinded information)
   - Valid / Allocated / Returned / Quarantined / Invalid / Expired - number of kits per status for each kit type. The number in parenthesis in the **Invalid** column indicates the accumulated (total) number of invalidated

kits.
- Kits in total - total number of kits including incoming kits

5. Number of list items showing out of the total amount of items, click **Previous** or **Next** to browse between the pages.
6. Select the number of kits per page to be shown.
7. Logistics settings: Set the expiry period and set alerts and thresholds for your supply. The alert settings are also accessible for the individual sites in the **Site** column. The settings you make on a specific site overrides the general settings you make. See Setting an expiry period and Setting low supply alerts for more information.

2.1 Truck icon

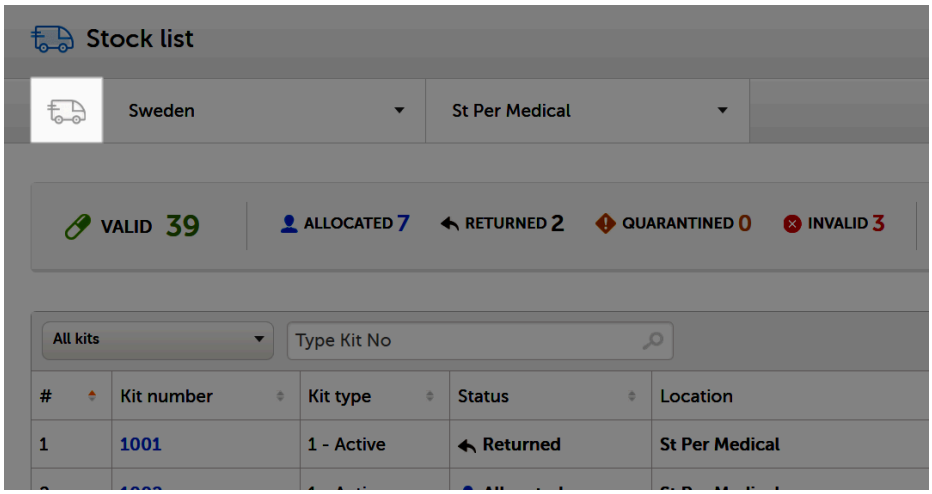
The truck icon represents kits that are in transit:

A green truck icon with a plus symbol indicates incoming number of kits to the location.

A grey truck indicates outgoing number of kits from the location.

2.2 Access from the Stock list page

To access the Study supply overview from the Stock list page, click the truck icon in the left corner. The button is only visible for users with permission to manage kits on study level.



Kit status

Kit status

Published by Viedoc System 2020-10-06

1. Introduction
    1.1 Kit status definitions
2. Where can I see the kit status?
    2.2 Filtering the stock list

1 Introduction

The kit status defines what state the kit is currently in. You manage the kits by changing the kit status — this is performed from the Stock list page. For instructions on how to change the kit status, see Managing kits.

1.1 Kit status definitions

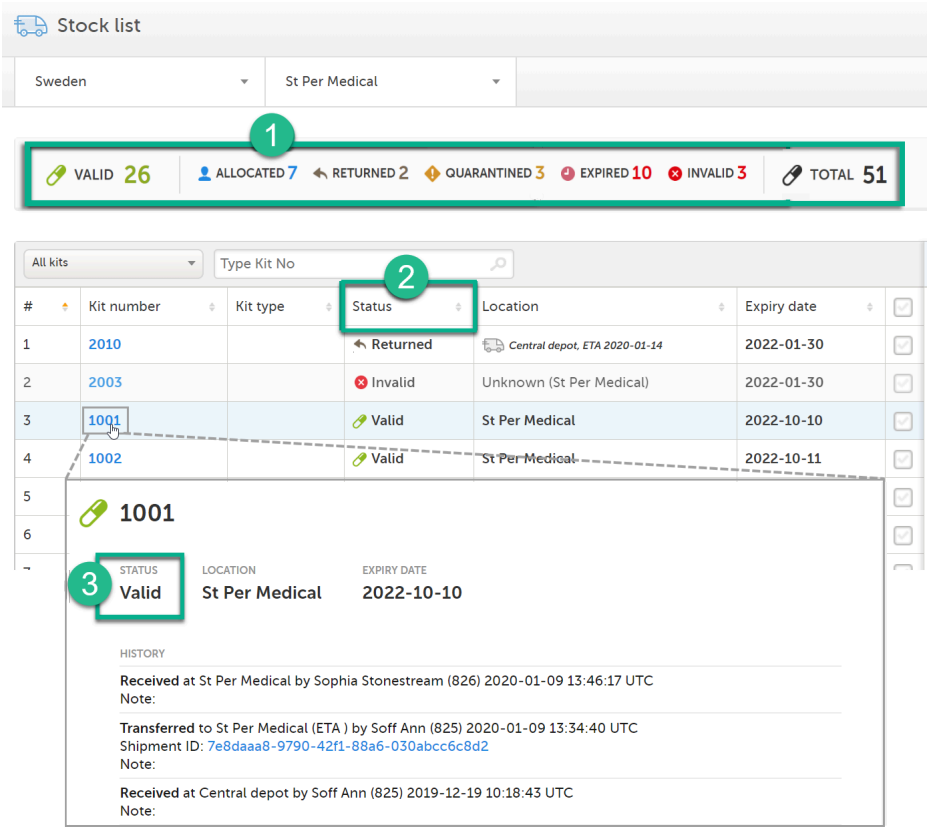
Valid	The kit is in good condition and can be allocated to the subject. All kits are set as Valid when uploaded from the global allocation list setup.
Allocated	The kit is allocated to the subject.
Returned	The kit is handed back to the site by the subject and is set to Returned in the system.
Quarantined	The kit is temporarily set aside for investigation and is not available for allocation.
Invalid	The kit is invalid and will not be used (the kit is lost, broken, or other).
Expired	The kit has expired and is not valid for allocation.

2 Where can I see the kit status?

You can see the kit status in the following places in Viedoc Logistics:

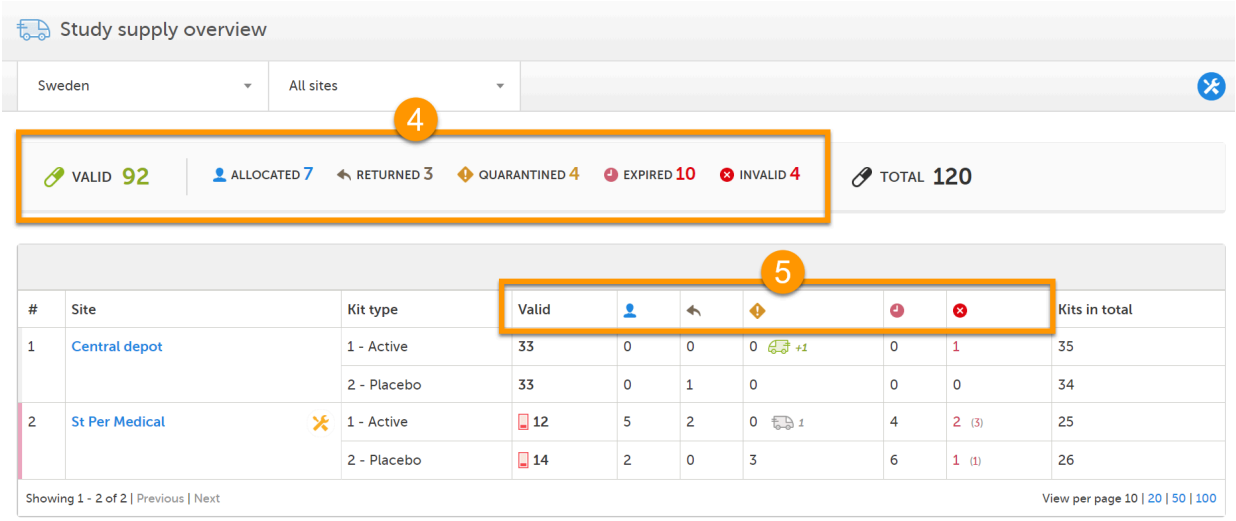
In the Stock list

1. In the metrics field, showing a summary of all kits on the filtered location.
2. In the **Status** column, showing the status of each kit.
3. In the kit details view, when clicking on a kit in the **Kit number** column, showing the status of the selected kit.



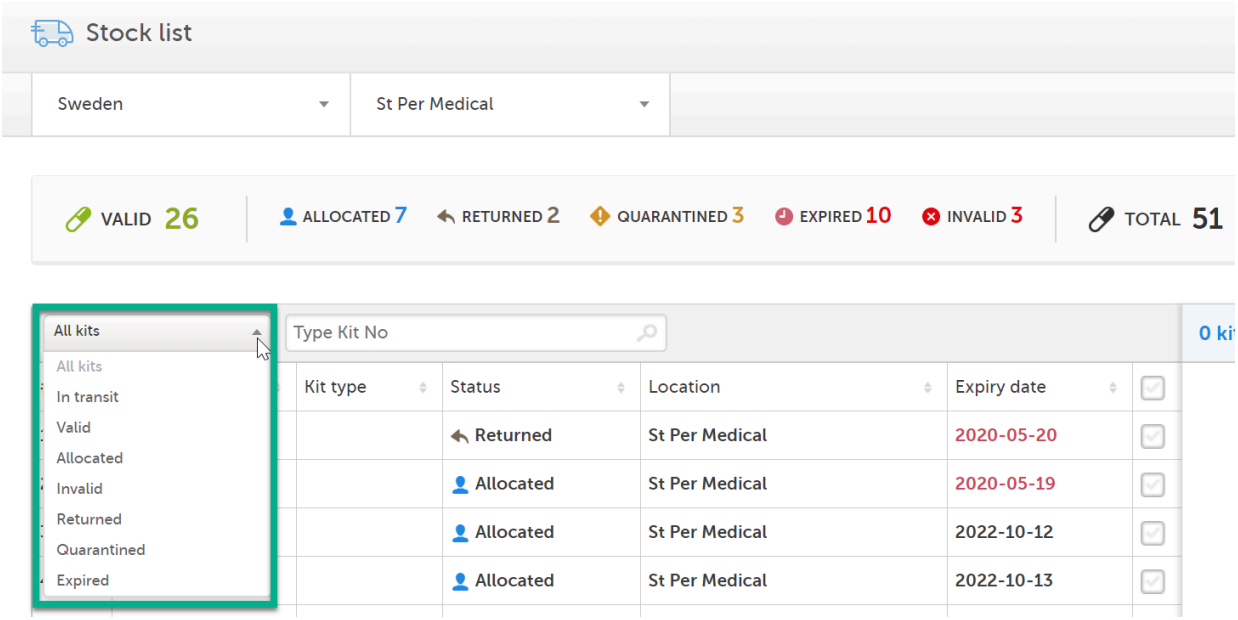
In the Study supply overview

4. In the metrics field, showing a summary of all kits on the filtered location.
5. In the table, showing the number of kits per site and kit type, sorted on kit status.



2.1 Filtering the stock list

You can filter the stock list to show kits of a certain status. Simply click the arrow and select a status in the drop-down menu:


Stock list
Sweden
St Per Medical
VALID 26
ALLOCATED 7
RETURNED 2
QUARANTINED 3
EXPIRED 10
INVALID 3
TOTAL 51
All kits
Type Kit No
0 ki
All kits
In transit
Valid
Allocated
Invalid
Returned
Quarantined
Expired
Kit type
Status
Location
Expiry date
Returned
St Per Medical
2020-05-20
Allocated
St Per Medical
2020-05-19
Allocated
St Per Medical
2022-10-12
Allocated
St Per Medical
2022-10-13

Managing kits

Published by Viedoc System 2020-10-06

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1 Introduction

You manage the kits by changing the kit status. Changing the kit status is done by selecting an action, to a single kit or to a selection of multiple kits at once. The available actions depend on the current kit status.

You can perform the following actions in Viedoc Logistics: Transfer - Receive - Cancel - Return - Quarantine - Restore - Invalidate - Edit expiry date

The following table shows what happens to the kit(s) when performing the actions:

Action	Result
Transfer	Initiates a kit shipment to the selected destination. The kit is in transit, illustrated by a truck icon in the stock list.
Receive	Completes a kit shipment. The new location is set.
Cancel	Cancels a kit shipment. The previous location is set.
Return	Sets the kit status of an allocated kit as returned from the study subject.
Quarantine	Sets the kit in quarantine, making it temporarily unavailable for allocation.
Restore	Restores a kit from quarantine and makes it valid for allocation.

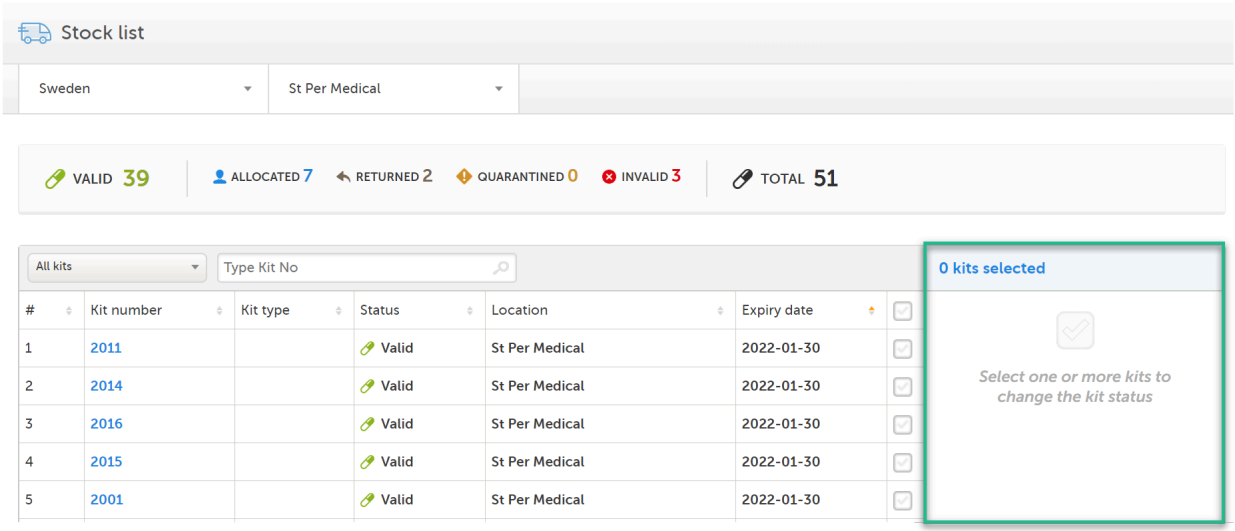
Action	Result
Invalidate	Makes a kit not available for allocation.
Edit expiry date	Changes the expiry date of the kit.

2 Kit management

2.1 Action pane

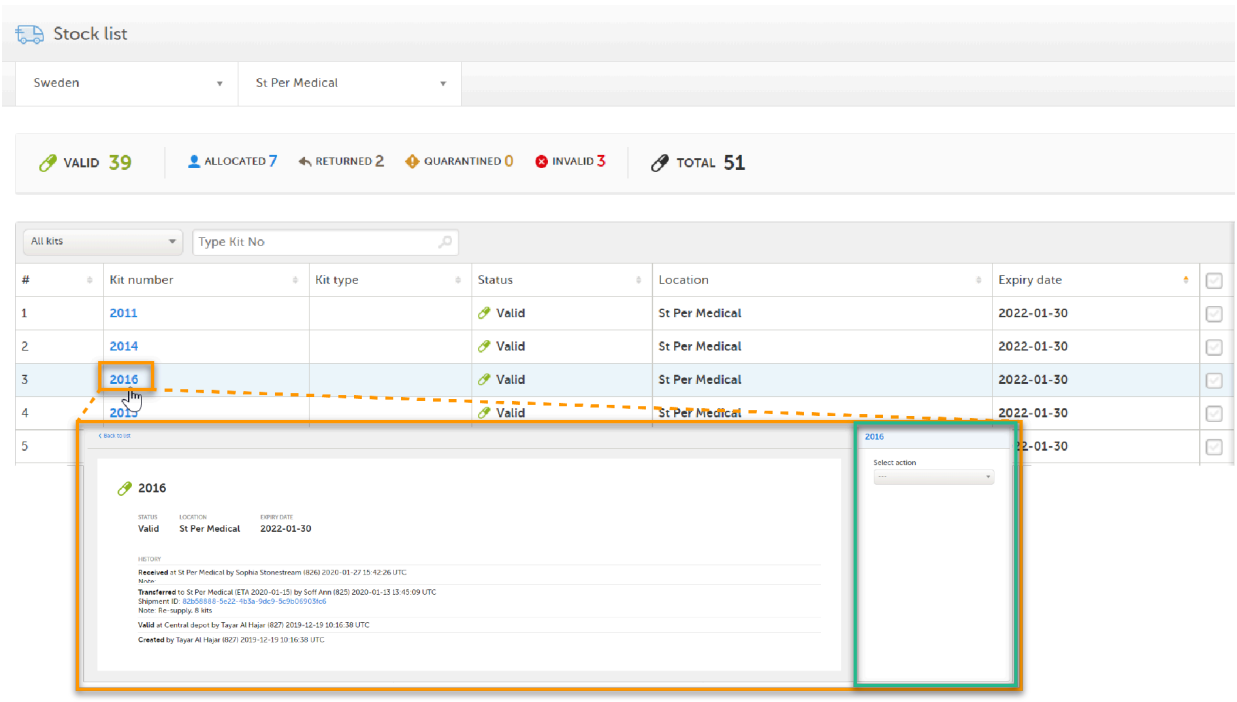
You manage the kits from the action pane. The pane is available in two places:

1. On the Stock list page, to the right:



#	Kit number	Kit type	Status	Location	Expiry date
1	2011		Valid	St Per Medical	2022-01-30
2	2014		Valid	St Per Medical	2022-01-30
3	2016		Valid	St Per Medical	2022-01-30
4	2015		Valid	St Per Medical	2022-01-30
5	2001		Valid	St Per Medical	2022-01-30

2. In the kit details view, by clicking on a **Kit number** in the stock list:

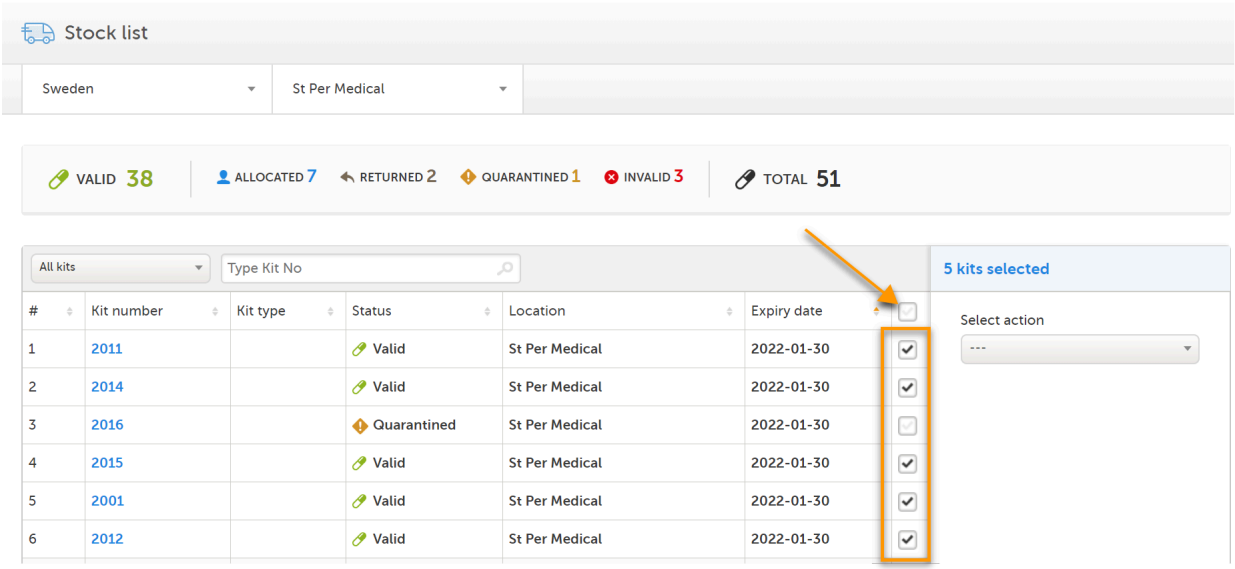


#	Kit number	Kit type	Status	Location	Expiry date
1	2011		Valid	St Per Medical	2022-01-30
2	2014		Valid	St Per Medical	2022-01-30
3	2016		Valid	St Per Medical	2022-01-30
4	2015		Valid	St Per Medical	2022-01-30
5					2-01-30

In the kit details view, you can only manage the kit you've selected. When you manage kits from the Stock list page, you can manage a selection of kits at once, see Selecting multiple kits below.

2.2 Selecting multiple kits

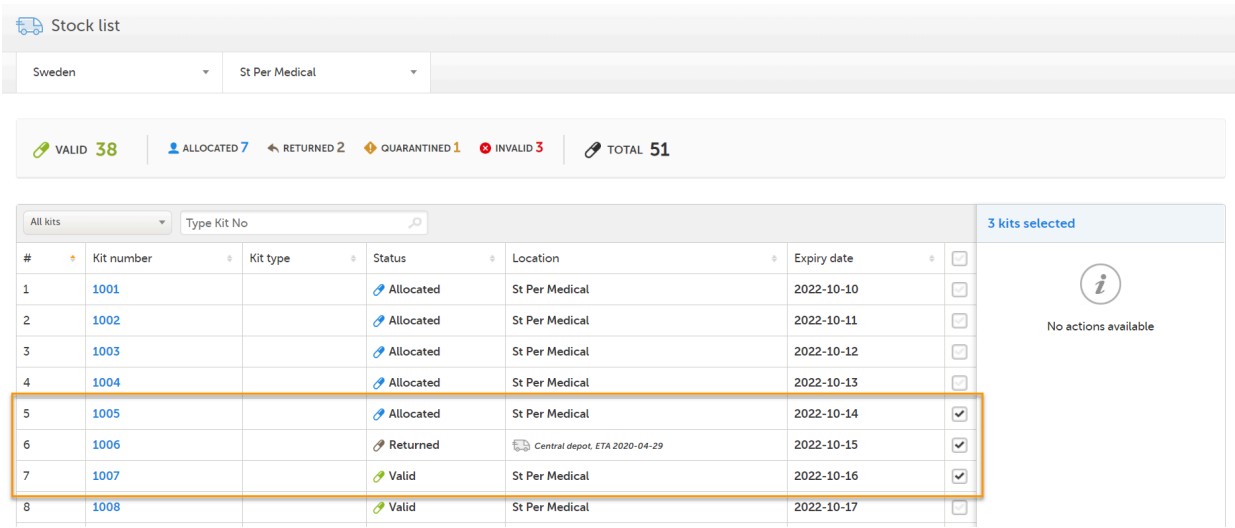
You can manage multiple kits at once if you want to perform the same action to a selection of kits. To select multiple kits, check the boxes in the rightmost column of the stock list. To select all kits, check the top box of the column.



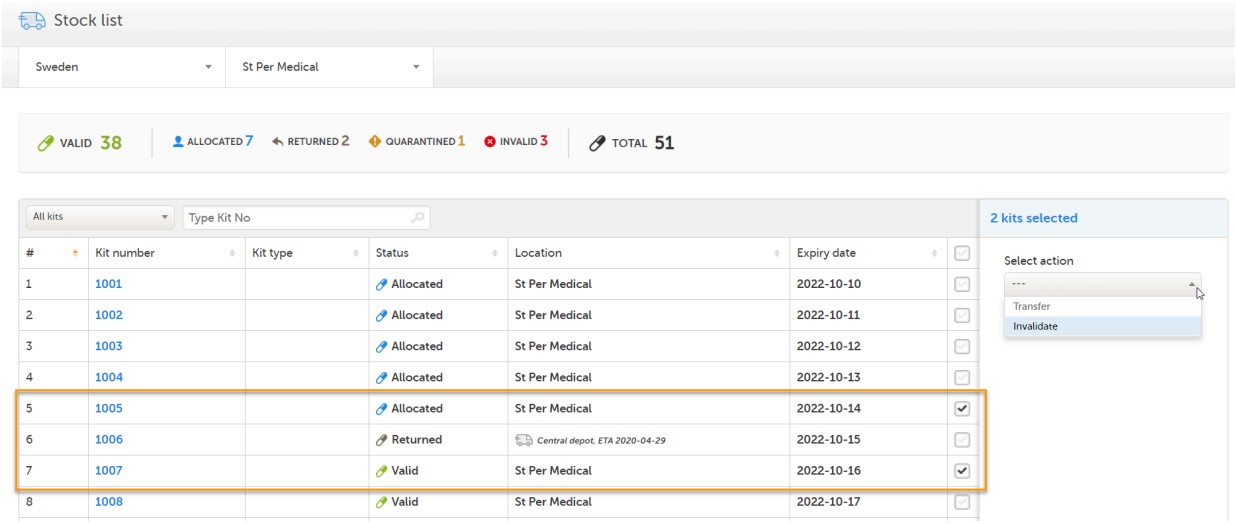
2.2.1 No actions available

Depending on your selection of kits in the stock list, there may be no applicable actions available. The available actions depend on the current status and/or location of the selected kits. If an action is not available, adjust the selection so that only kits that are applicable for the intended action are selected. Let's look at an example:

1. Three kits are selected, giving us the message **No actions available**:



2. Now, let's uncheck kit 1006 (in transit with status Returned). The actions **Transfer** and **Invalidate** becomes selectable, since these actions are both applicable for kit 1005 (Allocated) and 1007 (Valid):



For an overview of the conditions for setting actions, see Summary.

---

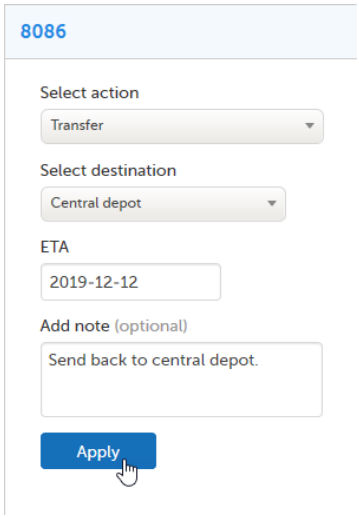
3 Performing actions

All actions that are performed to the kits are logged in the audit trail, which is visible in the kit details view. See Stock list and kit details view for more information.

3.1 Transferring a kit

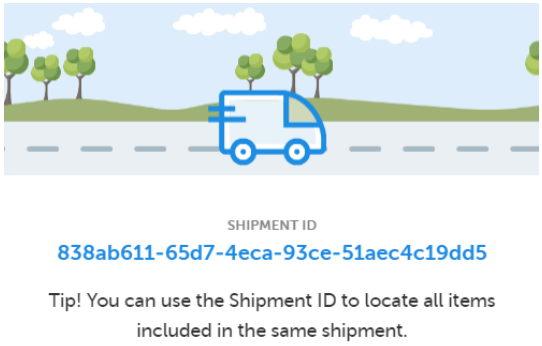
1. Select the kit(s) to transfer.
2. In the action pane, select **Transfer** in the action drop-down list.
3. Select the destination in the drop-down list.
4. *Optional:* Click on the field and select the date of the Expected Time of Arrival (ETA) in the date picker.
5. *Optional:* Enter a note.

6 Click **Apply**.



Now, two things happen:

1. A Shipment ID is generated, making it possible to keep track of the shipment:



The Shipment ID is also found in the audit trail in the kit details view. See Tracking shipments for more information on Shipment ID.

2. The location is set to **In transit**—illustrated with a truck icon in the **Location** column of the stock list—until the kit(s) are received or canceled.

A kit in transit can also be invalidated, which has the following effects:

- The kit status is set to **Invalid**.
- The kit is in transit until it is received or canceled. However, invalidated kits with the reason **Missing** will not be in transit. See Missing kits for more information.

The action **Transfer** can be performed if the conditions are as follows (the settings may vary depending on study setup):

To perform action...	The kit must have status...	And be located at...	So that study users can...	And site users can...
Transfer	• Valid • Invalid • Allocated • Returned • Quarantined	• Central depot • Country depot • Site	**Transfer** from Central depot to: • Country depot • Site **Transfer** from Country depot to: • Central depot • Site	**Transfer** from Site to: • Central depot • Country depot

3.1.1 Transfer kits from site to site

If there is a need to transfer valid kits from one site to another, for example in a scenario where Site A has remaining kits that will not be used, and the supply at Site B is running low, the user on site A can send the kits to Central or Country depot, where the Study Supply Manager or other user with permission to manage the kits in turn sends the kits to site B.

3.2 Receiving a kit

1. Select the kit(s) to receive.
2. In the action pane, select **Receive** in the drop-down list.
3. *Optional:* Enter a note.
4. Click **Apply**.
   The kit is now located at target destination.

The action Recieve can be performed if the conditions are as follows:

To perform action...	The kit must have status...	And be located at...	So that study supply users can...	And site supply users can...
Receive	• Valid • Invalid • Allocated • Returned • Quarantined	• In transit	Receive transfer to: • Central depot • Country depot	Receive transfer to: • Site

3.3 Cancelling a kit transfer

To cancel a kit transfer:

1. Select the kit(s) for which the transfer should be cancelled.
2. In the action pane, select **Cancel** in the drop-down list.
3. *Optional:* Enter a note.
4. Click **Apply**.
   The kit is now located at the previous location (from which it was transferred).

The action Cancel can be performed if the conditions are as follows:

To perform action...	The kit must have status...	And be located at...	So that study users can...	And site users can...
Cancel	• Valid • Invalid • Allocated • Returned • Quarantined	• In transit	Cancel transfer from: • Central depot • Country depot	Cancel transfer from: • Site

3.4 Allocating a kit

Kit allocation is the process of designating a kit to a specific subject. Kit allocation is performed in Viedoc Clinic and the feature is integrated with Viedoc Logistics. When a kit is allocated in Viedoc Clinic, the kit is immediately set as **Allocated** in Viedoc Logistics. Only kits with status **Valid** can be allocated, and there must be sufficient kits in stock at the location where the allocation will take place. Allocating kits is also dependent on the study set up, see Scope of allocation below.

3.4.1 Workflows for kit allocation

The regular workflow for kit allocation is as follows:

Order	Kit status	Description	Action
1	Valid	The kit is valid and available for allocation.	Allocate (in Viedoc Clinic)
2	Allocated	The kit is allocated to a specific subject.	Return
3	Returned	The kit is returned to the site.	

However, there can also be variations to the regular workflow of allocating a kit, as in the following three scenarios.

1. The kit allocation is undone:

Order	Kit status	Description	Action
1	Valid	The kit is valid and available for allocation.	Allocate (in Viedoc Clinic)
2	Allocated	The kit is allocated to a specific subject.	Undo (in Viedoc Clinic)
3	Valid	The kit is valid and available for allocation.	

2. The kit is invalidated after allocation and then returned:

Order	Kit status	Description	Action
1	Valid	The kit is valid and available for allocation.	Allocate (in Viedoc Clinic)
2	Allocated	The kit is allocated to a specific subject.	Invalidate
3	Invalid	The kit is invalid.	Return
4	Invalid	The kit is returned to the site (kit status **Invalid** remains).	

3. The kit is allocated, returned and then invalidated:

Order	Kit status	Description	Action
1	Valid	The kit is valid and available for allocation.	Allocate (in Viedoc Clinic)
2	Allocated	The kit is allocated to a specific subject.	Return
3	Returned	The kit is returned to the site.	Invalidate
4	Invalid	The kit is invalid.	

Note! Kits that have been allocated and then become invalidated or returned, as in scenario 2 and 3, are shown in the stock list as **Invalid** or **Returned**. It is only possible to identify if an invalid or returned kit was previously allocated by checking the kit details view of each kit.

3.4.2 Scope of allocation

The option for where a kit can be allocated from is dependent on the study setup. In the most flexible setup, kits can be allocated from the Country and/or Central depot if no kits are available at Site. There are three possible scopes for allocation:

1. The scope is set to allocation at Site (S*tudy site*) only. The kit must be valid and located at site in order to allocate the kit.

2. The scope is set to allocation at Site and Country depot *(Country)*. If no valid kit is available at site, allocation is performed with the next available kit from the country depot. After allocation, the kit is transferred to site and physically delivered to the study subject.

3. The scope is set to allocation at Site and Central depot *(Study)*. If no valid kit is available at site, allocation can be performed from the central depot. After allocation, the kit is transferred to site and physically delivered to the study subject.

3.5 Returning a kit after allocation

1. Select the kit to return.
2. In the action pane, select **Return** in the drop-down list.
3. *Optional:* Enter a note.
4. Click **Apply**.
   The kit status is set to Returned.

The action Return can be performed if the conditions are as follows:

To perform action...	The kit must have status...	And be located at...	So that study users can...	And site users can...
Return	• Allocated • Invalid (after allocation)	Site	N/A	Return allocated kit on: • Site

3.6 Setting a kit in quarantine

In some scenarios, it could be unclear if a kit is valid for allocation. The kit action Quarantine can then be used, setting the kit as **Quarantined** until further actions are taken. The kit can be restored, invalidated or transferred when in quarantine.

To set a kit in quarantine:

1. Select the kit to set in quarantine.
2. In the action pane, select **Quarantine** in the drop-down list.
3. Enter the reason for setting the kit in quarantine.
4. Click **Apply**.
   The kit status is set to **Quarantined**.

The action Quarantine can be performed if the conditions are as follows:

To perform action...	The kit must have status...	And be located at...	So that study users can...	And site users can...
Quarantine	• Valid	• Central depot • Country depot • Site • In transit	Quarantine kits on: • Central depot • Country depot • Site • In transit	Quarantine kits on: • Site • In transit (to the site where the user has permission)

3.7 Restoring a kit from quarantine

To restore a kit and set it as valid:

1 Select the quarantined kit to restore.

2 In the action pane, select **Restore** in the drop-down list.

3 Enter the reason for restoring the kit.

4 Click **Apply**.
The kit status is set to **Valid**.

The action Restore can be performed if the conditions are as follows:

To perform action...	The kit must have status...	And be located at...	So that study users can...	And site users can...
Restore	• Quarantined	• Central depot • Country depot • Site • In transit	Restore kits on: • Central depot • Country depot • Site • In transit	Restore kits on: • Site • In transit (to the site where the user has permission)

3.8 Invalidating a kit

During the course of the study, if a kit for some reason is not valid before or after allocation, for example if it is lost or broken, the action Invalidate sets the kit as **Invalid**. A kit can be invalidated at any time during the study.

Important! Invalidating a kit is an irreversible action - the kit will always have the status **Invalid**, irrespective of its allocation status or whether it is returned after invalidating the kit.

To set a kit as invalid:

1 Select the kit to invalidate.

2 In the action pane, select **Invalidate** in the drop-down list.

3 Select **Missing** / **Broken** / **Other** in the reason drop-down list.
If reason Other was selected: Enter the reason for invalidating the kit.

4 Click **Apply**.
The kit status is set to **Invalid**.

The action Invalidate can be performed if the conditions are as follows:

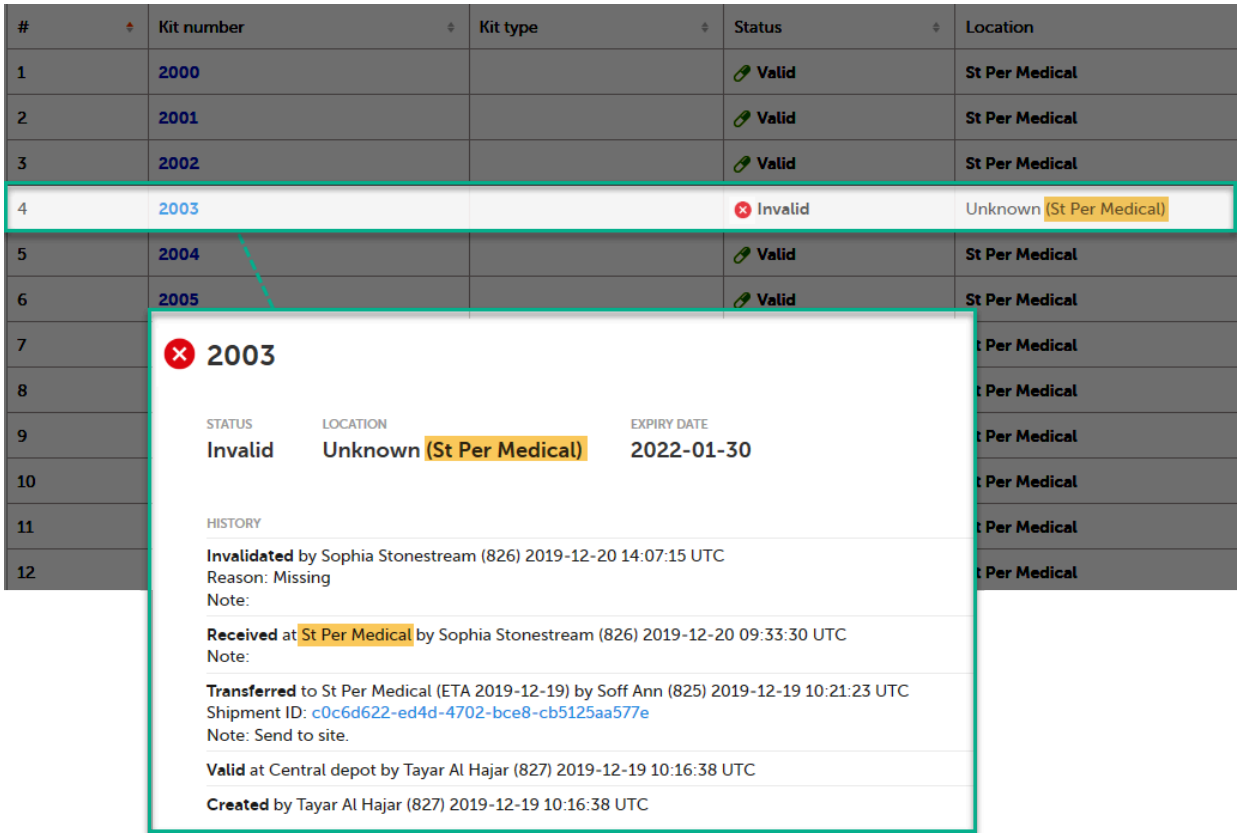
To perform action...	The kit must have status...	And be located at...	So that study users can...	And site users can...
Invalidate	• Valid • Allocated • Returned • Quarantined	• In transit • Central depot • Country depot • Site	Invalidate kit: • In transit from/to Central depot • In transit from/to Country depot • In transit from/to Site • At Central depot • At Country depot • At Site	Invalidate kit: • At Site • In transit from/to Site

3.8.1 Missing kits

When a kit is invalidated and the reason is set to **Missing**, the following happens:

- The kit is outgrayed in the stock list and becomes unselectable.
- The location is set to **Unknown** in the stock list and in the kit details view, with the last known location stated in parenthesis.
- No further transfer is possible.

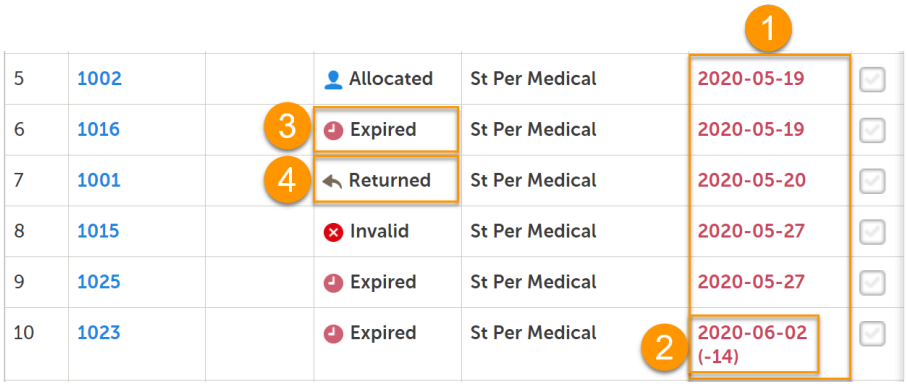
In the below example, the last known location was on site, at St Per Medical, where the kit was received:



3.9 Editing the expiry date

Note! The action to edit the expiry date is only available for users that manage kits on study level.

In the stock list, expired kits are shown with a red expiry date in the Expiry date column (1), for example 2020-05-19. If an expiry period was set by a Study Supply Manager, and the expiry date is within that period, the number of days of the expiry period is shown in parentheses next to the expiry date (2), for example 2020-06-02 (-14). In this example, the expiry period is set to 14 days. For more information on expiry period, see Setting an expiry period.



Only kits that have kit status **Valid** prior to expiry will get the new kit status **Expired** (3). If the expiry date is then edited so that the kit is no longer expired, the kit status will return to **Valid**.

Kits with status other than **Valid** can also expire but their kit status remain (4). All expired kits can however always be identified with a red-colored date in the Expiry date column.

To edit the expiry date:

1 Select the kit for which you want to edit the expiry date.

2 In the action pane, select **Edit expiry date** in the drop-down list.

3 Select a date in the date picker.

4 Enter the reason for editing the expiry date.

5 Click **Apply**.

The new expiry date of the kit(s) is saved.

The action Edit expiry date can be performed if the conditions are as follows:

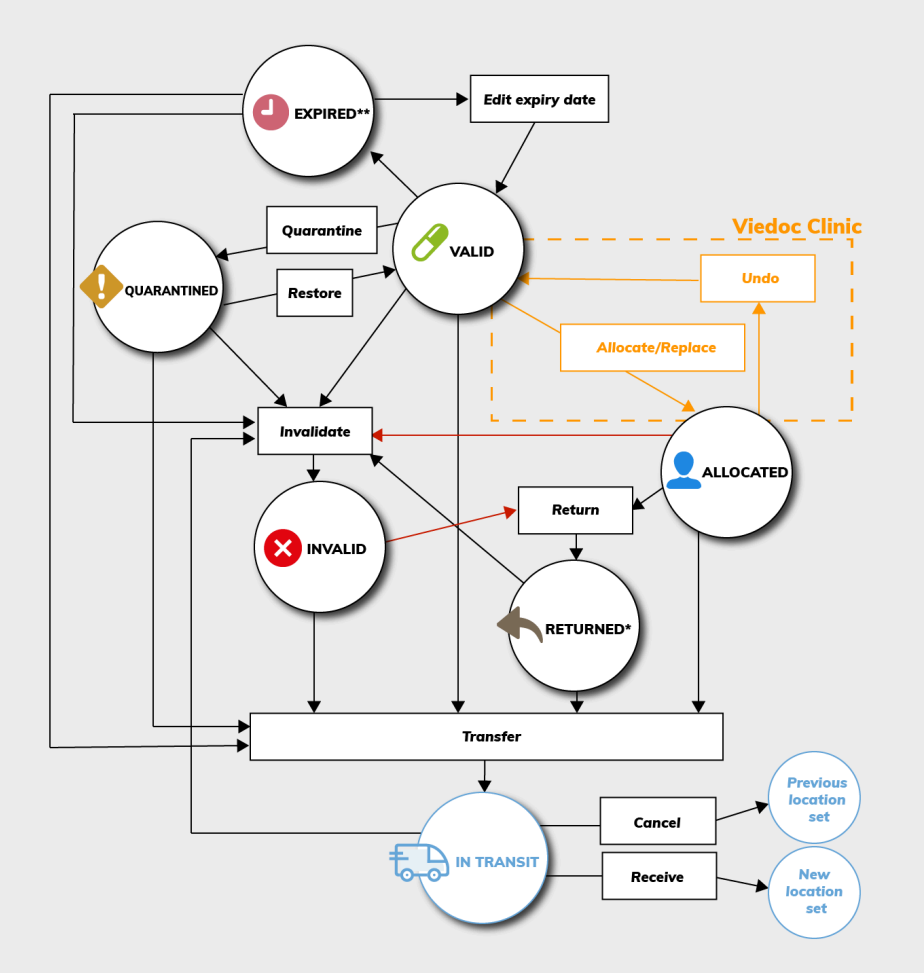
To perform action...	The kit must have status...	And be located at...	So that study users can...	And site users can...
Edit expiry date	• Valid • Allocated • Returned • Quarantined • Invalid • Expired	• In transit • Central depot • Country depot • Site	Edit expiry date on kits: • In transit from/to Central depot • In transit from/to Country depot • In transit from/to Site • At Central depot • At Country depot • At Site	

4 Workflows

4.1 Chart

The actions available depend on the current kit status. Below is a chart illustrating the possible workflows depending on kit status.

Tip! Start at the circle with kit status VALID and follow the arrows to see what actions are available from there.



*A returned kit that has been invalidated will remain as **Invalid**. That is, it will not be set as **Returned**.

An expired kit is set to **Expired only if it was **Valid** at the time of expiry. See Editing the expiry date for more information.

4.2 Summary

To sum it all up, actions are dependent on kit status, location, and user role permissions. Your user role determines which sites you have access to and where you can handle kits. But in general, and as set up with the default roles Study Supply Manager and Site Supply Manager, the following applies:

To perform action...	The kit must have status...	And be located at...	So that study users can...	And site users can...
Transfer	• Valid • Invalid • Allocated • Returned • Quarantined	• Central depot • Country depot • Site	Transfer from Central depot to: • Country depot • Site Transfer from Country depot to: • Central depot • Site	Transfer from Site to: • Central depot • Country depot
Receive	• Valid • Invalid • Allocated • Returned • Quarantined	• In transit	Receive transfer to: • Central depot • Country depot	Receive transfer to: • Site

To perform action...	The kit must have status...	And be located at...	So that study users can...	And site users can...
Cancel	• Valid • Invalid • Allocated • Returned • Quarantined	• In transit	Cancel transfer from: • Central depot • Country depot	Cancel transfer from: • Site
Return	• Allocated • Invalid (after allocation)	• Site	N/A	Return allocated kit on: • Site
Quarantine	• Valid	• Central depot • Country depot • Site • In transit	Quarantine kits on: • Central depot • Country depot • Site • In transit	Quarantine kits on: • Site • In transit (to the site where the user has permission)
Restore	• Quarantined	• Central depot • Country depot • Site • In transit	Restore kits on: • Central depot • Country depot • Site • In transit	Restore kits on: • Site • In transit (to the site where the user has permission)
Edit expiry date	• Valid • Allocated • Returned • Quarantined • Invalid • Expired	• In transit • Central depot • Country depot • Site	Edit expiry date on kits: • In transit from/to Central depot • In transit from/to Country depot • In transit from/to Site • At Central depot • At Country depot • At Site	
Invalidate	• Valid • Allocated • Returned • Quarantined	• In transit • Central depot • Country depot • Site	Invalidate kit: • In transit from/to Central depot • In transit from/to Country depot • At Central depot • At Country depot • At Site	Invalidate kit: • At Site • In transit from/to Site

Tracking shipments

Tracking shipments

Published by Viedoc System 2020-04-23

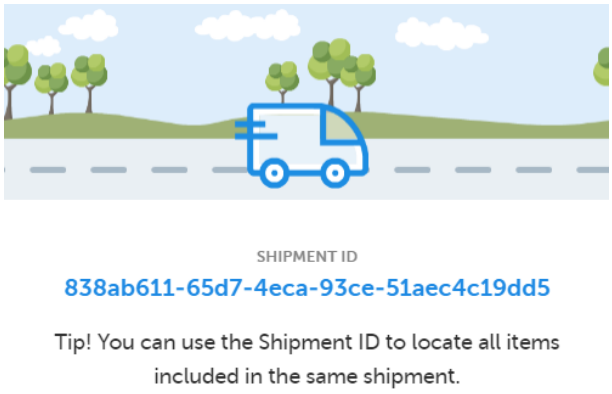
1. Introduction
2. Where can I see the Shipment ID?
3. Searching kits using the Shipment ID
4. Same kit in multiple shipments
5. Canceled transfers

1 Introduction

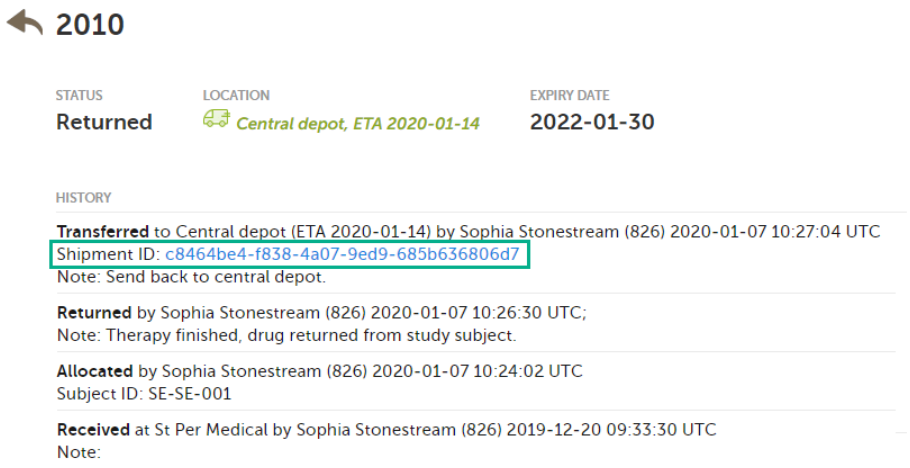
A Shipment ID is generated when you perform a transfer of a single or multiple kits, making it possible to keep track of the shipments during the study. All kits ever included in a transfer have a Shipment ID related to them.

2 Where can I see the Shipment ID?

When performing a transfer, a pop-up is displayed showing the Shipment ID:



You can also find the Shipment ID in the kit details view, under every transfer action performed:



In both views, the Shipment ID is a clickable link, see Searching kits using the shipment ID for more information.

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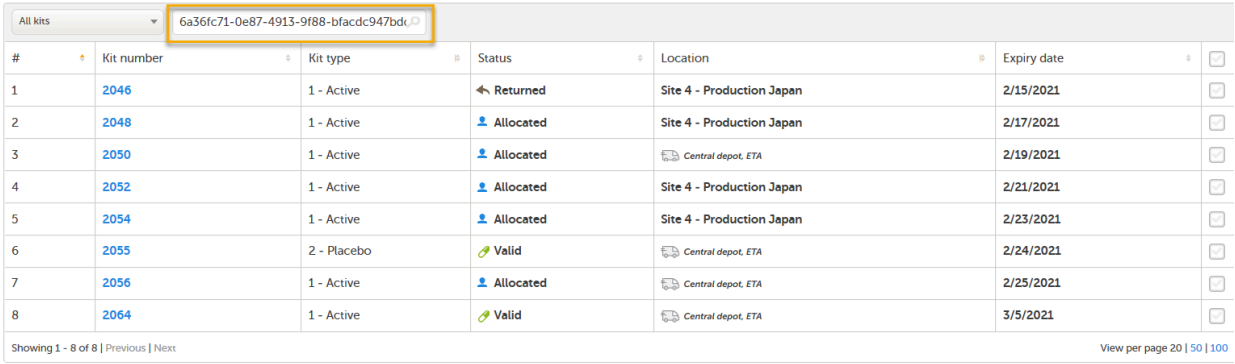
3 Searching kits using the Shipment ID

When clicking the Shipment ID link, you will be redirected to the Stock list page. Here, the Shipment ID is automatically filled into the search field and all kits that belong to that shipment are listed:



#	Kit number	Kit type	Status	Location	Expiry date
1	2046	1 - Active	Returned	Site 4 - Production Japan	2/15/2021
2	2048	1 - Active	Allocated	Site 4 - Production Japan	2/17/2021
3	2050	1 - Active	Allocated	Central depot, ETA	2/19/2021
4	2052	1 - Active	Allocated	Site 4 - Production Japan	2/21/2021
5	2054	1 - Active	Allocated	Site 4 - Production Japan	2/23/2021
6	2055	2 - Placebo	Valid	Central depot, ETA	2/24/2021
7	2056	1 - Active	Allocated	Central depot, ETA	2/25/2021
8	2064	1 - Active	Valid	Central depot, ETA	3/5/2021

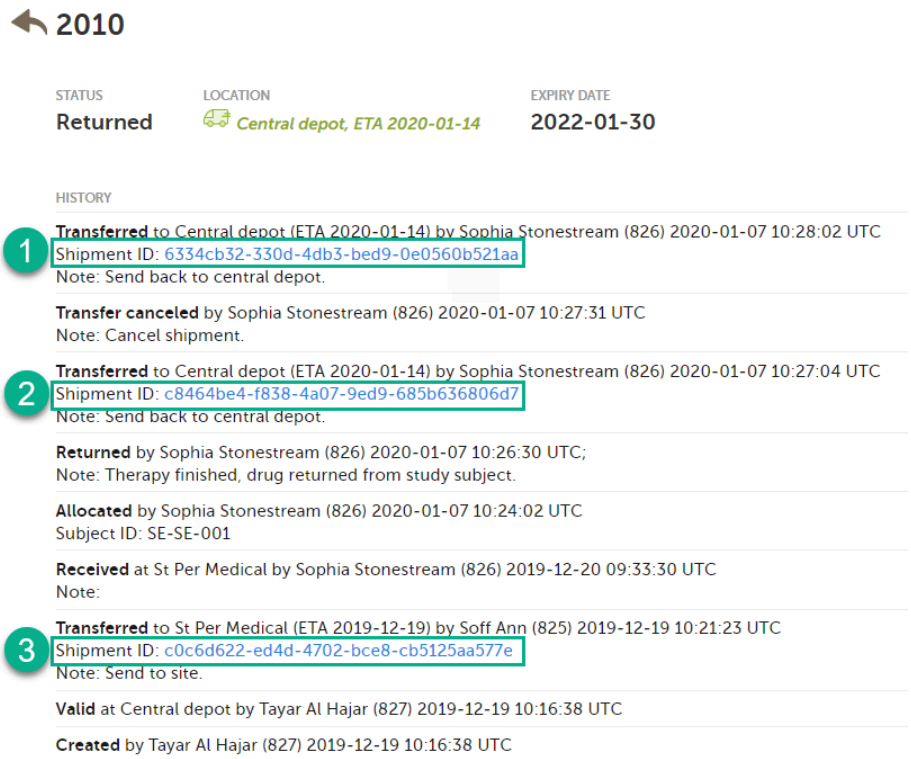
Showing 1 - 8 of 8 | Previous | Next
View per page 20 | 50 | 100

You can also manually enter or scan a Shipment ID into the search field. To search for multiple kits, enter commas between the numbers (*for example 1001,1002,1003*).

---

4 Same kit in multiple shipments

A kit can belong to several shipments, because the ID is created each time a transfer is performed. In the following example, kit number 2010 was transferred three times and is therefore included in three shipments:



Kit 2010 will be listed in each search that is done in the stock list with the Shipment IDs related to it. However, the second shipment (2) was subsequently canceled and will therefore not appear in the stock list when searching for that Shipment ID. See Canceled transfers below for more details.

---

5 Canceled transfers

When a transfer is performed and a Shipment ID is created, and then the shipment is canceled, the Shipment ID will not list the kit in the search result. The Shipment ID is still visible in the kit details view but the clickable link will not show the kit in the search result.

2010

STATUS
Returned

LOCATION
Central depot, ETA 2020-01-14

EXPIRY DATE
2022-01-30

HISTORY

Transferred to Central depot (ETA 2020-01-14) by Sophia Stonestream (826) 2020-01-07 10:28:02 UTC
Shipment ID: 6334cb32-330d-4db3-bed9-0e0560b521aa
Note: Send back to central depot.

Transfer canceled by Sophia Stonestream (826) 2020-01-07 10:27:31 UTC
Note: Cancel shipment.

Transferred to Central depot (ETA 2020-01-14) by Sophia Stonestream (826) 2020-01-07 10:27:04 UTC
Shipment ID: c8464be4-f838-4a07-9ed9-685b636806d7
Note: Send back to central depot.

Returned by Sophia Stonestream (826) 2020-01-07 10:26:30 UTC;
Note

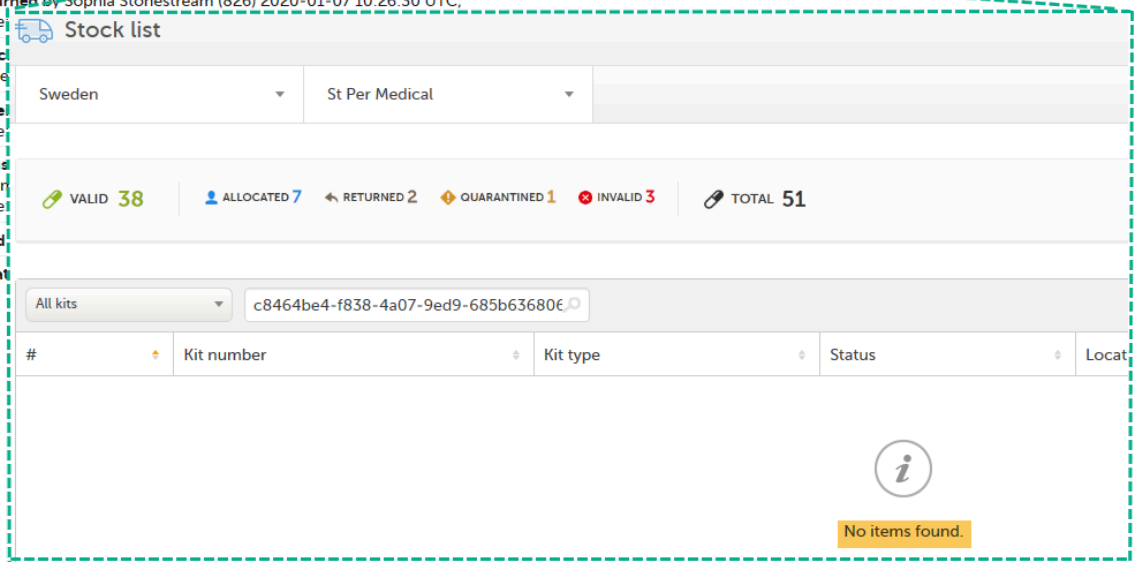
Alloc
Subje

Recei
Note

Trans
Shipr
Note

Valid

Creat



Setting an expiry period

Setting an expiry period

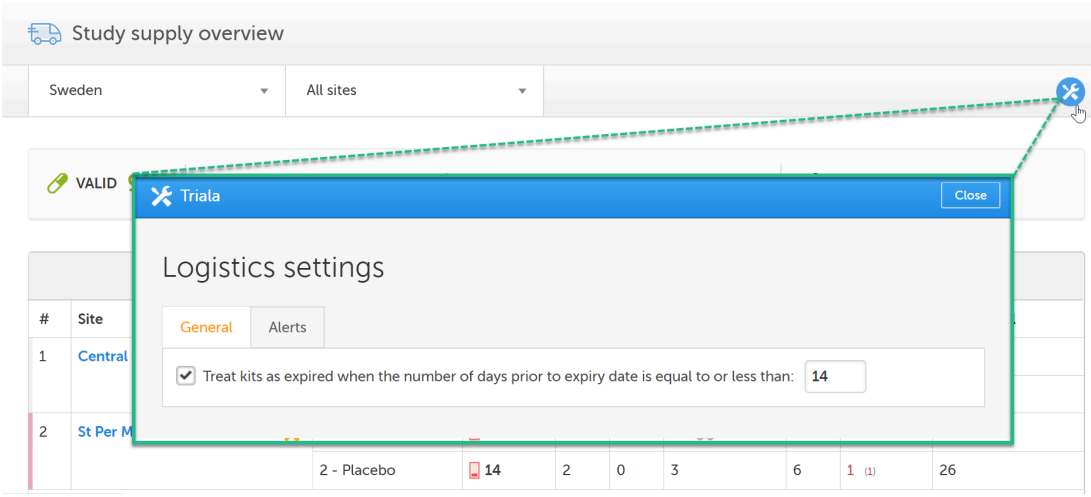
Published by Viedoc System 2020-06-03

This lesson applies to users with access to the Study supply overview.

For better control of your inventory, you can define an expiry period so that the system sets kits as expired when they get close to the actual expiry date. You define this period by setting how many days prior to the expiry date the kits should expire.

To set an expiry period:

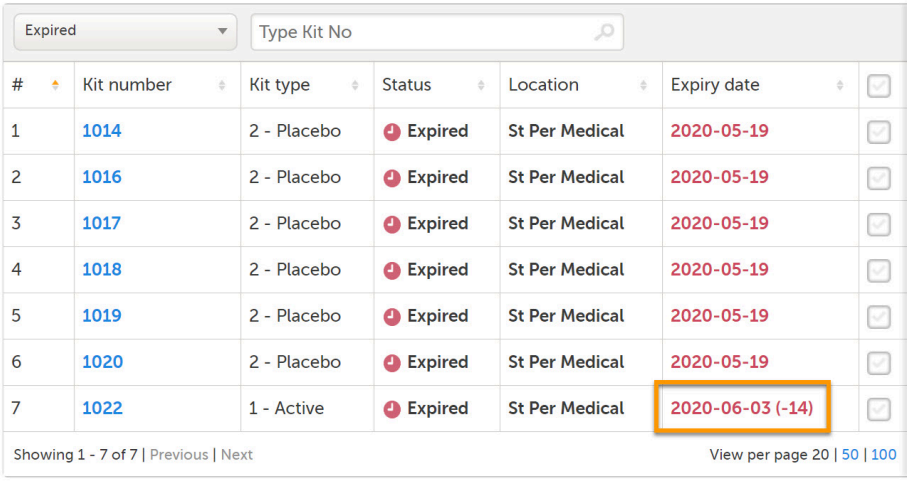
1 In the Study supply overview, click the **Edit** button in the top right corner:



2 In the pop-up window, select the option **Treat kits as expired when the number of days prior to expiry date is equal to or less than** and enter the number of days.

3 Click **Save changes**.

In the stock list, the defined expiry period is shown in parentheses for kits that expired in the expiry period:



Setting low supply alerts

Setting low supply alerts

Published by Viedoc System 2020-08-27

1. Introduction
    1.1 Alert symbols
2. Alert settings
    2.2 Setting alerts for all sites
    2.3 Setting alerts for individual sites
3. Email alerts

This lesson applies for users with access to the Study supply overview.

1 Introduction

To ensure that there is sufficient supply during the study, you can set alerts and be notified when the supply is running low. Thresholds can be set for all sites in the study or for specific sites. The settings you make for individual sites always override the general settings you make.

> Important! Once you make individual alert settings for a specific site, this is an irreversible action. You can never go back and apply the general alert settings for that site. You can however always *edit* the alert levels for the site, including enabling/disabling the settings. Note that the tools symbol next to the site will remain lit (orange), even if you have disabled the settings for the site.

1.1 Alert symbols

When alerts are activated, and the amount of kits are lower than the set level, a symbol appears in the **Valid** column:

#	Site	Kit type	Valid
1	Central depot	1 - Active	1005 +1 8
		2 - Placebo	1010 +2 9
		A - Vitamin A	16
		B - Vitamin B	16 +1 1
		C - Vitamin C	16 +1 1
		D - Vitamin D	15 1
2	Country depot (JP)	1 - Active	1 1
		2 - Placebo	5 1
		A - Vitamin A	0
		B - Vitamin B	0
		C - Vitamin C	0
		D - Vitamin D	0
3	Country depot (SE)	1 - Active	0 +1

A colored bar in the far left column is also lit to indicate that there is an alert (yellow/red).

There are two alert levels that can be activated:

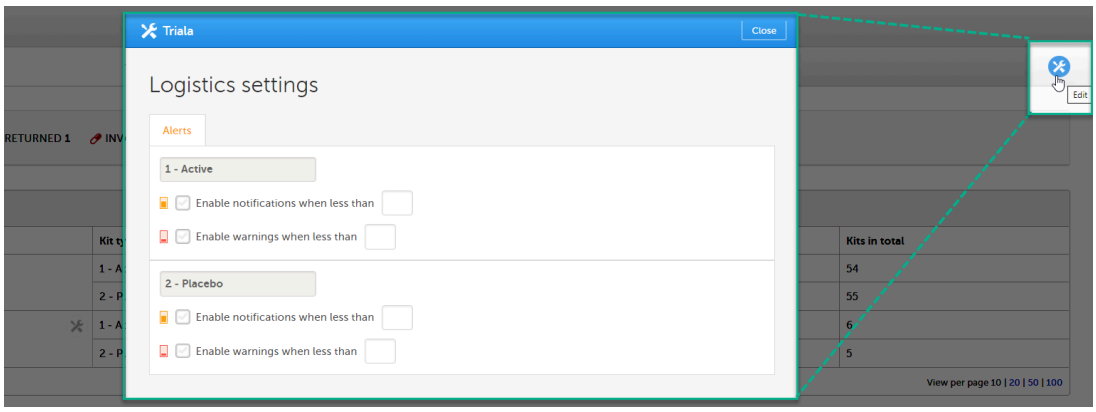
	Notifications	To notify the user that the supply is running low.
	Warnings	To warn the user that the supply is running critically low.

2 Alert settings

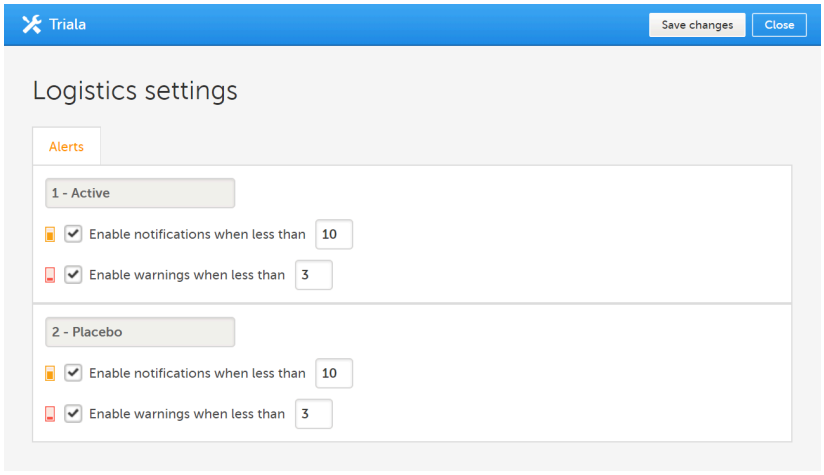
2.1 Setting alerts for all sites

To set alerts for all sites:

1 In the Study supply overview, click the **Edit** button in the top right corner:



2 In the pop-up window, for each kit type, select the option to enable notifications and/or alerts, and enter the values for when alerts shall trigger.

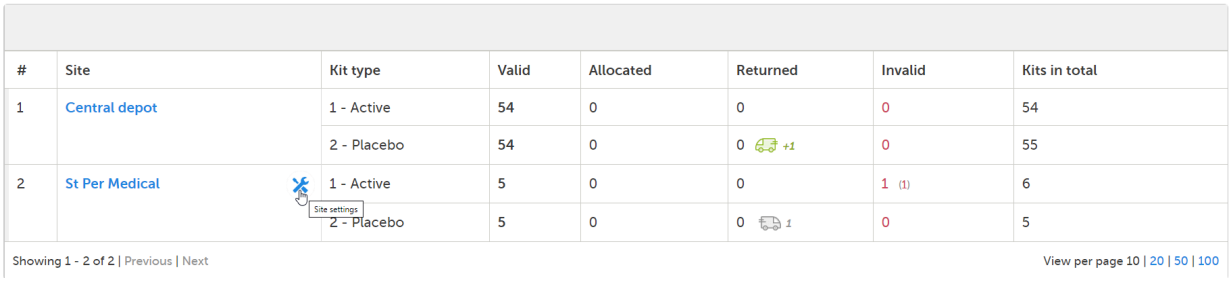


3 Click **Save changes**.

The alert symbols will appear when the supply is less than the set values.

2.2 Setting alerts for individual sites

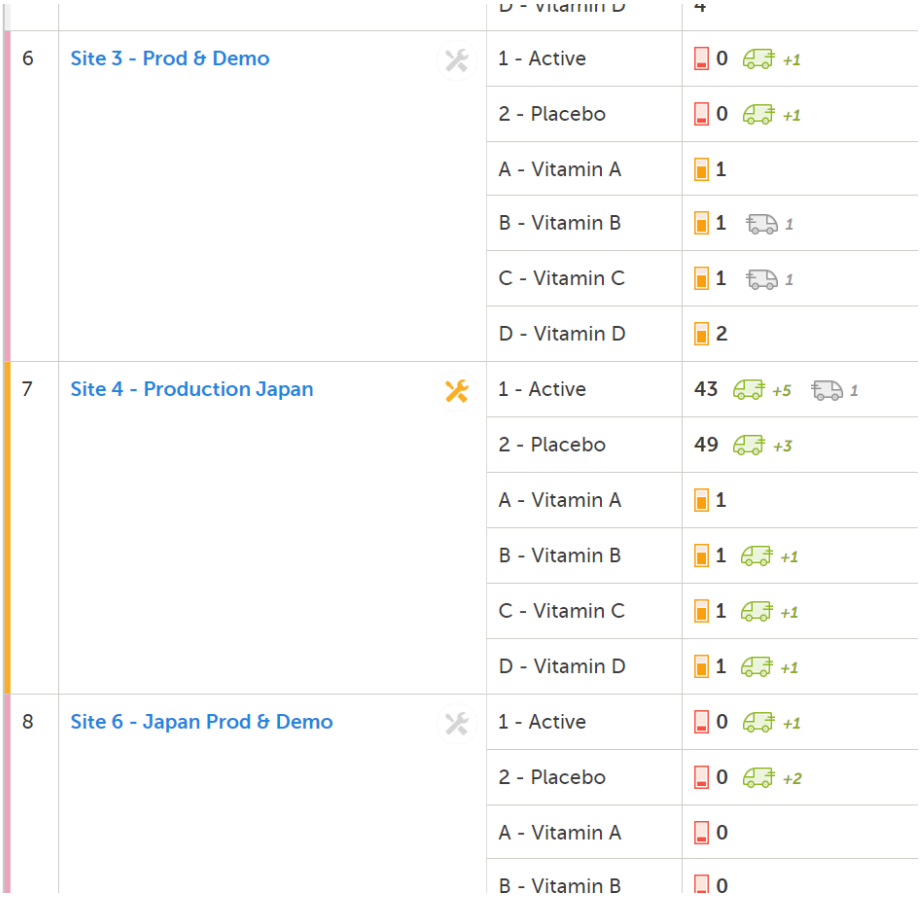
To set alerts for a specific site, click on the tools symbol next to the site in the **Site** column and then follow step 2-3 in Setting alerts for all sites.



#	Site	Kit type	Valid	Allocated	Returned	Invalid	Kits in total
1	Central depot	1 - Active	54	0	0	0	54
		2 - Placebo	54	0	0 +1	0	55
2	St Per Medical	1 - Active	5	0	0	1 (1)	6
		2 - Placebo	5	0	0 1	0	5

Note! Settings of specific sites always override the general settings.

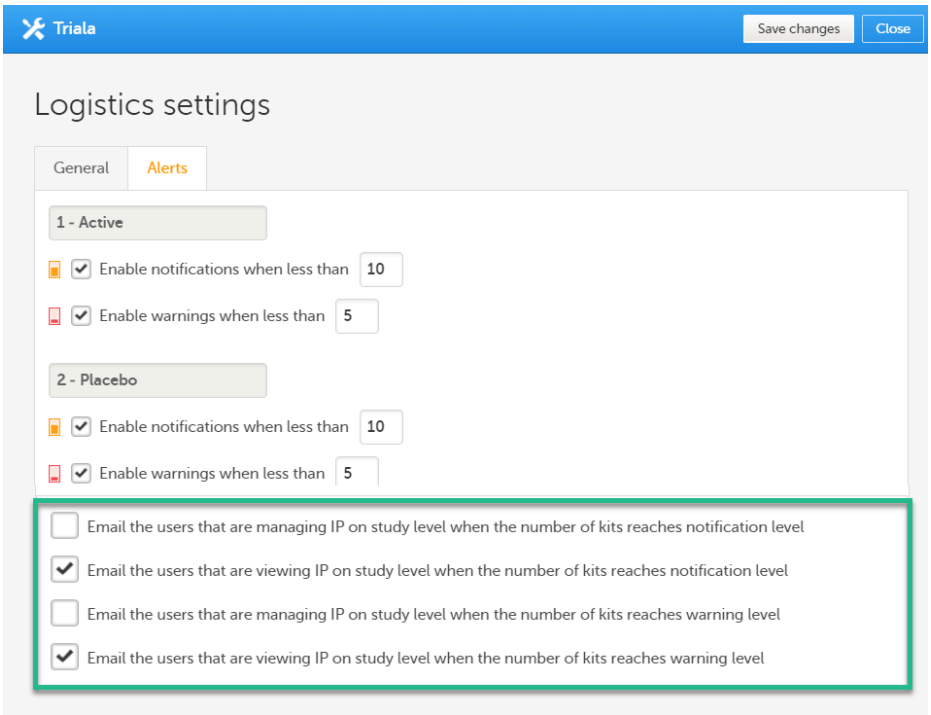
The tools symbol turns orange when there are individual settings activated for a particular site. The tools symbol remains gray if no individual settings are set and the general settings apply at the site. It also remains gray if there are no alert settings configured.



		D - Vitamin D	4
6	Site 3 - Prod & Demo	1 - Active	0 +1
		2 - Placebo	0 +1
		A - Vitamin A	1
		B - Vitamin B	1 1
		C - Vitamin C	1 1
		D - Vitamin D	2
7	Site 4 - Production Japan	1 - Active	43 +5 1
		2 - Placebo	49 +3
		A - Vitamin A	1
		B - Vitamin B	1 +1
		C - Vitamin C	1 +1
		D - Vitamin D	1 +1
8	Site 6 - Japan Prod & Demo	1 - Active	0 +1
		2 - Placebo	0 +2
		A - Vitamin A	0
		B - Vitamin B	0

3 Email alerts

You can configure email alerts to easily keep track of the supply status. The email is sent out to the users that have permission to manage or view kits on study level. You configure the thresholds for when the emails should be triggered in **Logistics settings** (the same pop-up where the general thresholds are set).

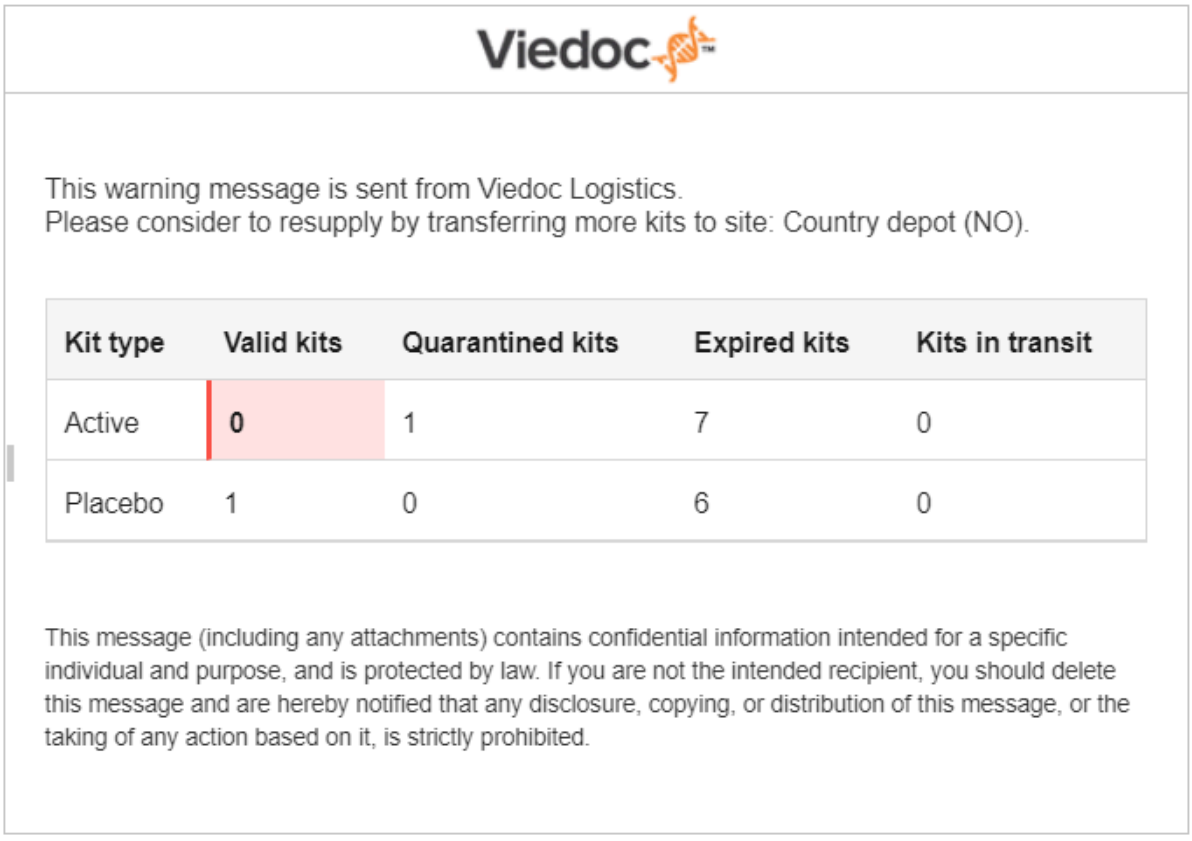


With the above thresholds as an example, an email is triggered when:

The following option is selected: **Email the users that are viewing IP on study level when the number of kits reaches notification level** and the number of Active and/or Placebo in stock is lower than 10.

The following option is selected: **Email the users that are viewing IP on study level when the number of kits reaches warning level** and the number of Active and/or Placebo in stock is lower than 5.

The email looks as follows:



The number of quarantined kits, expired kits, as well as kits in transit are also shown in the email so that you can estimate and plan the inventory accordingly.

Note! It is not possible to make email settings per site—the email settings are general and apply to all sites. The emails are however triggered per site and you can see in the email for which site the email was triggered.

Resupplying kits to sites

Resupplying kits to sites

Published by Viedoc System 2023-04-25

1. Introduction
2. User roles
3. Scenario

1 Introduction

This use case illustrates what the workflow can look like when kits are low in stock at site and it's time to re-supply.

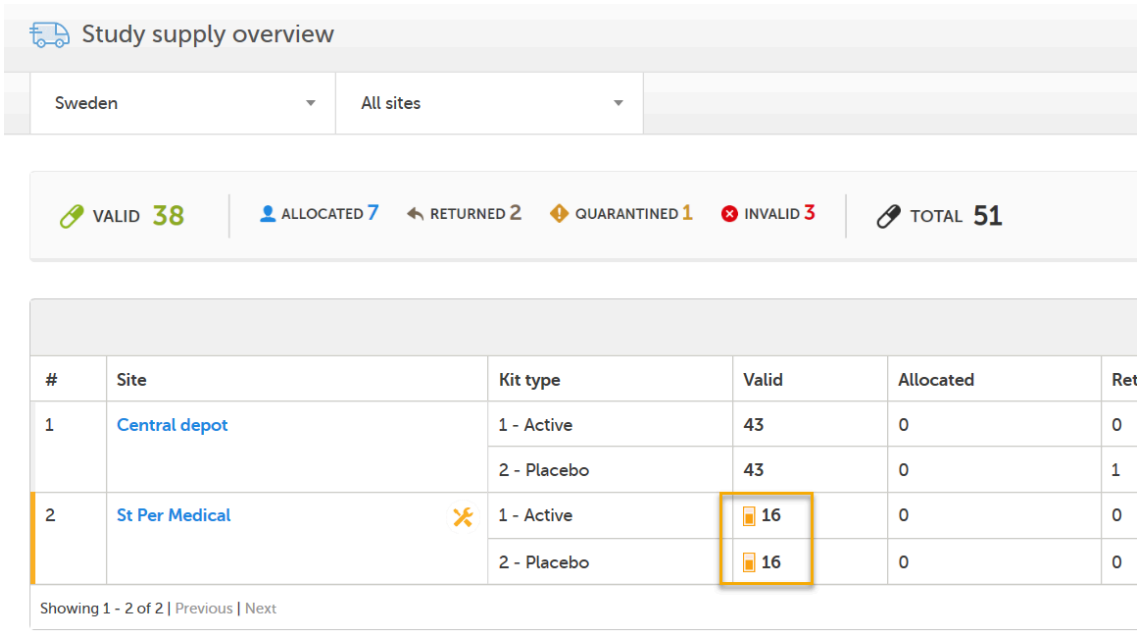
2 User roles

Site Supply Manager

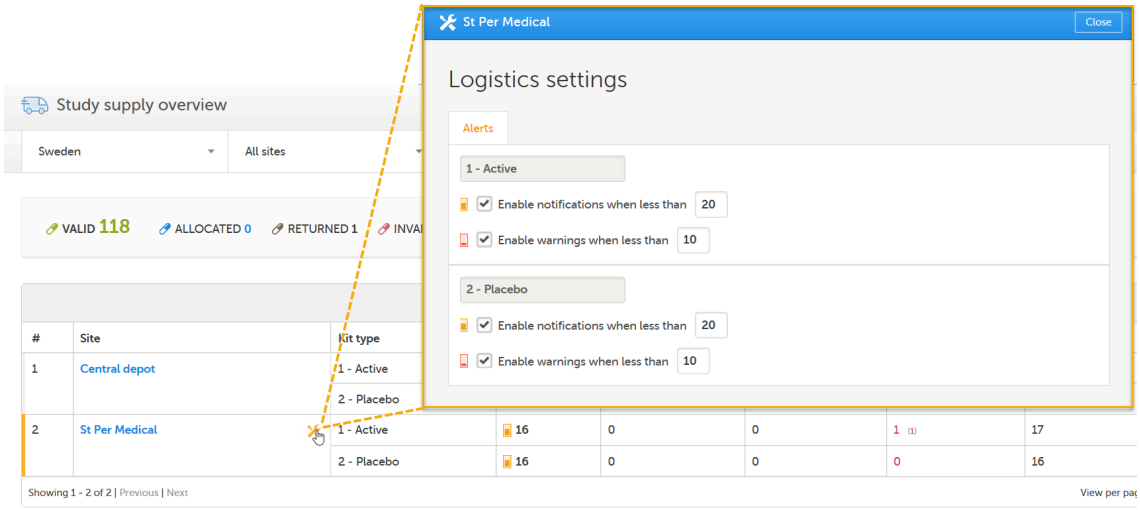
Study Supply Manager

3 Scenario

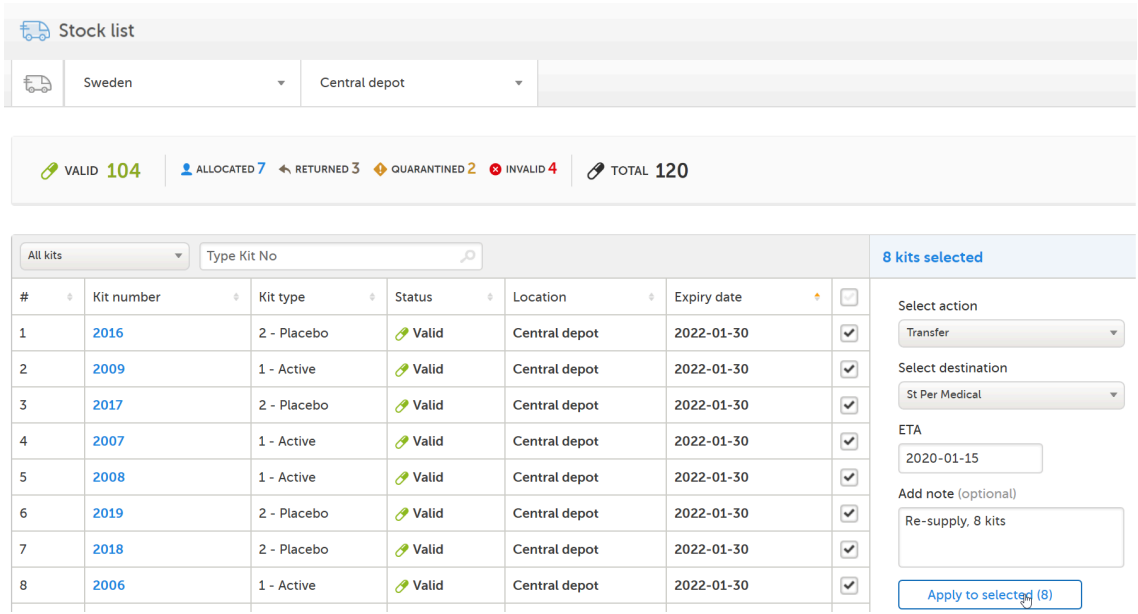
1 The Study Supply Manager views alert notifications for site St Per Medical:



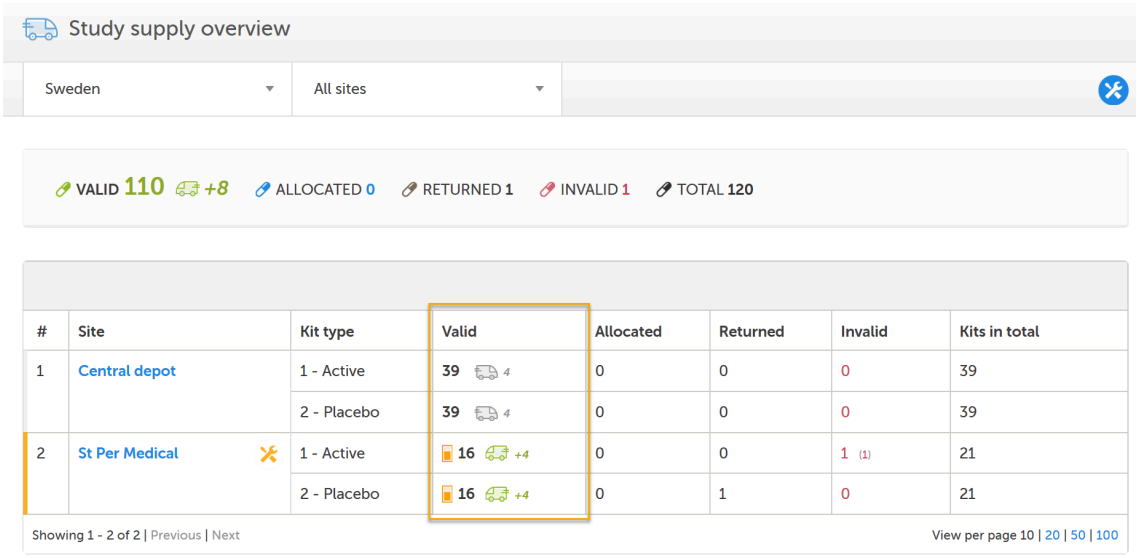
The notifications are enabled to alert when there are less than 20 kits at site St Per Medical (for both kit types):



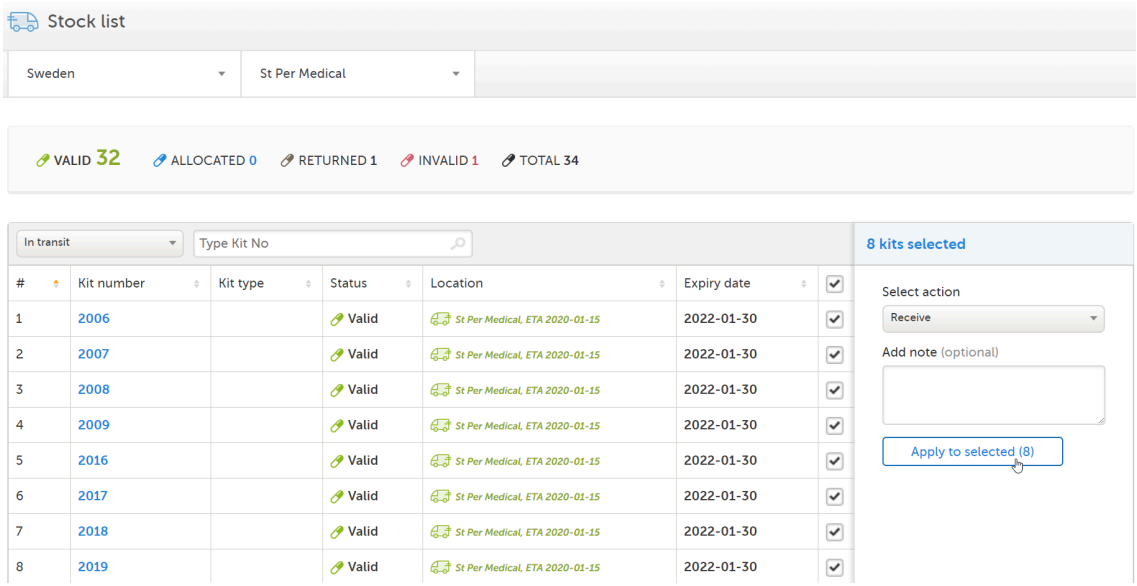
2 The Study Supply Manager transfers 8 kits to site St Per Medical, 4 of each kit type:



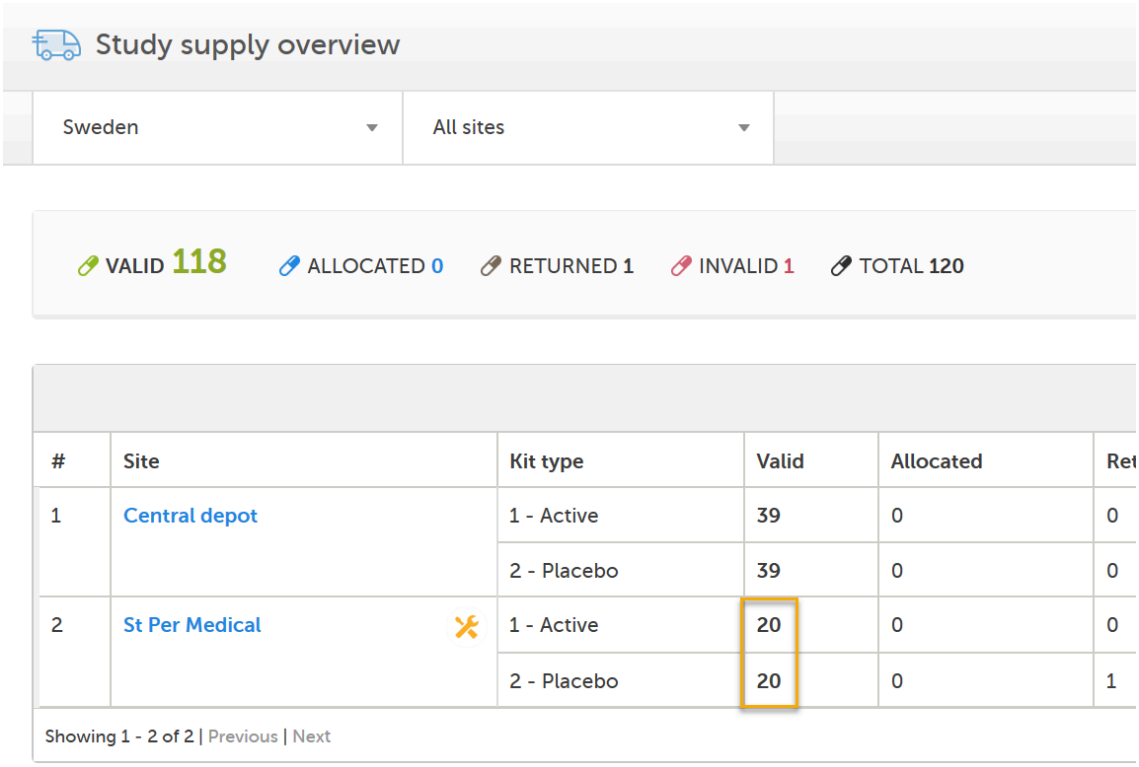
3 Now, if the Study Supply Manager checks the Study supply overview, the 8 kits in transfer are shown in the **Valid** column, as 8 outgoing kits from Central depot, and 8 incoming kits to St Per Medical:



4 The Site Supply Manager can see the incoming kits to St Per Medical in the stock list. When the kits arrive at St Per Medical, the Site Supply Manager sets the kits as received:



5 The Study Supply Manager can now see that the kits are valid at St Per Medical and the alert notifications are no longer visible:



Allocating and returning a kit

Published by Viedoc System 2023-04-25

1. Introduction
2. User roles
3. Scenario

1 Introduction

This use case illustrates what the workflow can look like when allocating a kit to a study subject (from Viedoc Clinic), how to handle the used kit handed back by the subject and finally how to transfer the kit to Central depot for destruction.

2 User roles

Site Supply Manager
Investigator

In this use case, a user with two roles—Site Supply Manager and Investigator—have access and permission to handle randomization, allocation and supply management at site level.

3 Scenario

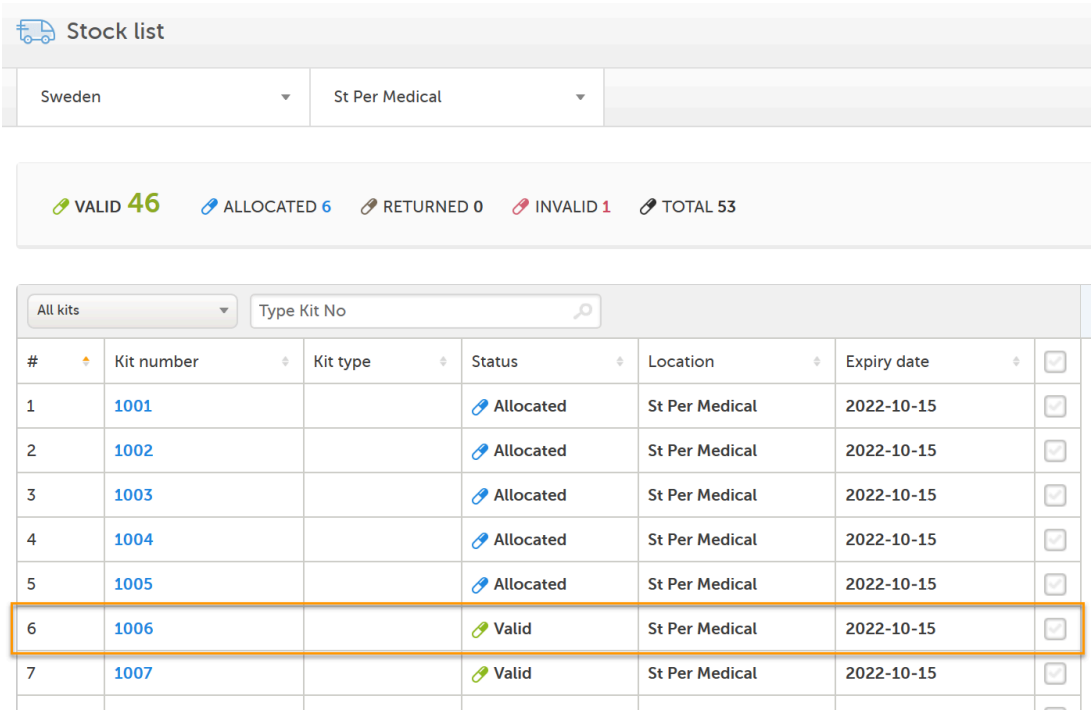
Randomization and allocation is performed in Viedoc Clinic. In this use case, two separate forms are used but it can also be done in one form, depending on the study design. To learn more about randomization and allocation, see the lesson Randomization, allocation and emergency unblinding in Viedoc User Guide for Site Users.

1 The subject is first randomized to be assigned a treatment. The treatment is blinded and not visible to the user.

Then a kit is allocated in the allocation form.

2 The kit allocated is the first available/valid kit containing the treatment the subject was assigned to in the randomization. Here we have kit number 1006 picked from the stock list (which is based on the global allocation list):

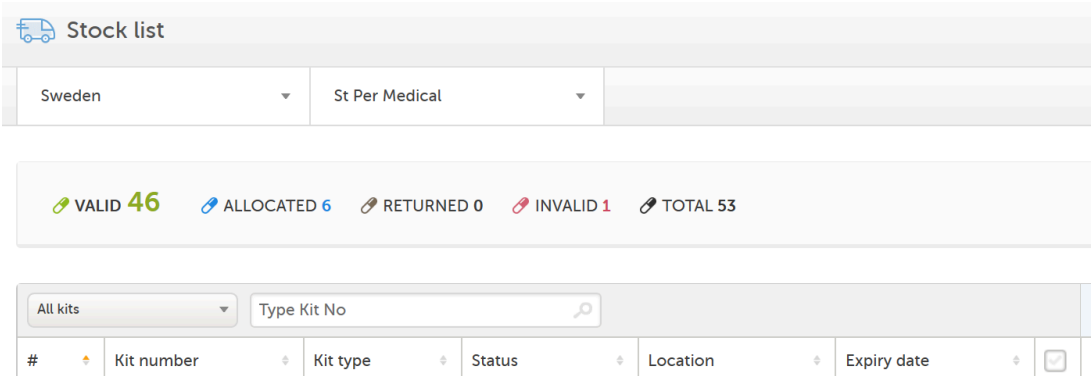
3 Let's follow the journey of kit number 1006 in Viedoc Logistics. Before clicking **Allocate** in Viedoc Clinic, kit number 1006 can be seen as **Valid** in the stock list:



#	Kit number	Kit type	Status	Location	Expiry date
1	1001		Allocated	St Per Medical	2022-10-15
2	1002		Allocated	St Per Medical	2022-10-15
3	1003		Allocated	St Per Medical	2022-10-15
4	1004		Allocated	St Per Medical	2022-10-15
5	1005		Allocated	St Per Medical	2022-10-15
6	1006		Valid	St Per Medical	2022-10-15
7	1007		Valid	St Per Medical	2022-10-15

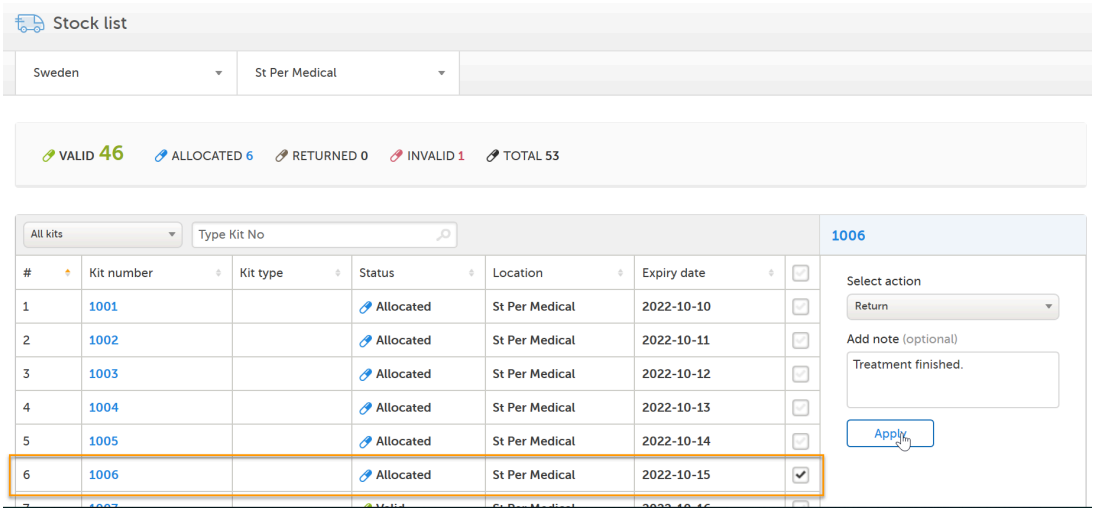
As we can see, the **Kit type** column is empty since this is blinded information. The user does not know which kit is containing what treatment.

4 Now, after clicking **Allocate** in Viedoc Clinic, let's refresh the page - the kit is now seen as **Allocated** in the stock list:

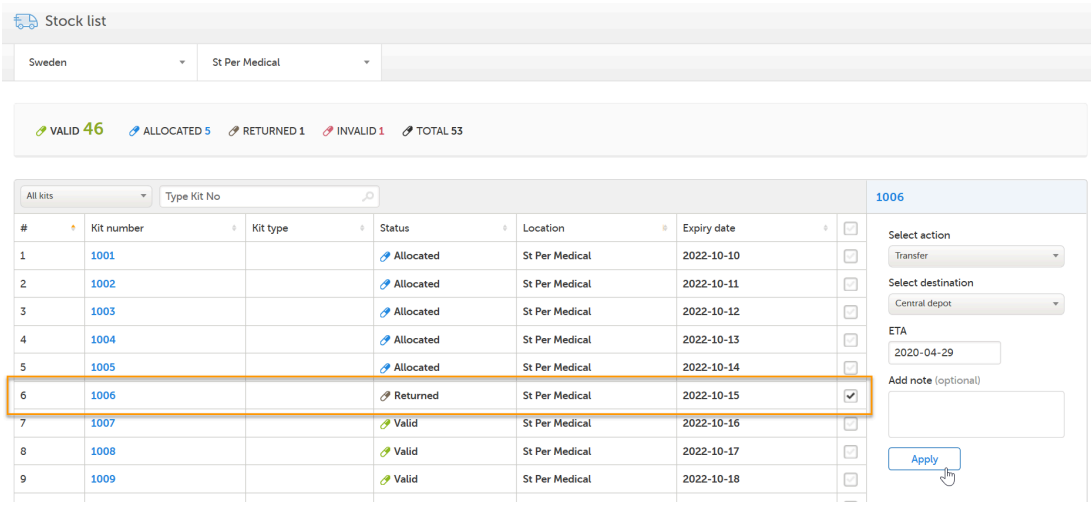


#	Kit number	Kit type	Status	Location	Expiry date
1	1001		Allocated	St Per Medical	2022-10-15
2	1002		Allocated	St Per Medical	2022-10-15
3	1003		Allocated	St Per Medical	2022-10-15
4	1004		Allocated	St Per Medical	2022-10-15
5	1005		Allocated	St Per Medical	2022-10-15
6	1006		Allocated	St Per Medical	2022-10-15
7	1007		Valid	St Per Medical	2022-10-15

5 To continue through the whole workflow, let's pretend some time passes and the study subject hands over the used kit to the site who in turn sets the kit as **Returned**:

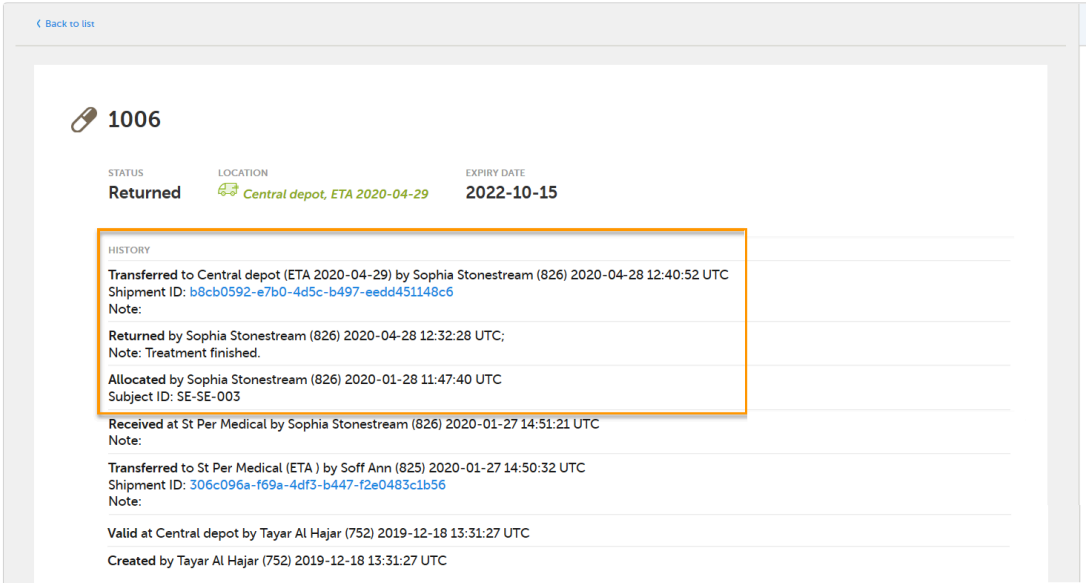


6 Now that the kit has correct status - the user transfers it back to Central depot:



Eventually a user with permission to manage kits on study level will set the kit as **Recieved** and the kit's journey through the workflow is completed.

If we click on kit 1006, we can see the history of all the actions that was ever performed to the kit, with the actions included in this use case highlighted in the orange frame. Among information about when and by whom the actions were performed, we can also see that kit number 1006 is connected to subject ID *SE-SE-003* (registered below **Allocated**).



How to set up Viedoc Logistics

How to set up Viedoc Logistics

Published by Viedoc System 2021-03-24

This video gives an overview of how to set up Viedoc Logistics to ship your investigational product between sites and depots and how to allocate kits to patients.

If you have difficulties in viewing this video, click here.

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Version 2.1