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# Humanitarian Supply Management System SUMA

## Module Warehouse Management

### USER'S MANUAL

### VERSION 5.1 for Windows



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# Introduction

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The Humanitarian Supply Management System, SUMA, is a collective effort of Latin American and Caribbean countries, with the sponsorship of the Pan American Health Organization and the financial support of the Government and the People of the Netherlands, to improve the management of relief supplies, whether they come from provinces or cities in the disaster-affected country or from the international community.

## Problems with the Arrival of Unsolicited Supplies

One of the main problems confronting national authorities in the aftermath of a disaster is identifying accurately what supplies have been received, where they are, and determining exactly how useful they are. Often, following a well-meaning but inadequate impulse of solidarity from possible donors, useless items take up attention and resources at the expense of other urgently needed articles. This situation presents a variety of problems with political repercussions<sup>1</sup>, including:

1. The space and means of transportation are limited.
2. Technical information on the supplies is often lacking.
3. The donors and the mass media receive a negative impression.

## SUMA objectives

The objective of SUMA is to provide a systematic approach to supply management problems, involving training personnel who, using a variety of materials and an easy-to-use and flexible electronic tool, ensure that the supplies are classified, inventoried, and prioritized at their point of entry. The following aspects of SUMA aid in solving the basic problems:

- \* Trained health personnel to sort and classify supplies
- \* Labels are attached to the boxes and/or packages with the following information:
  - Distribution priority
  - Whether the shipment contains health items and/or medicines
  - Whether items need refrigeration
- \* Inventory is made of valuable items, based on technical and operational criteria
- \* Donations are registered at the point of entry using a computerized system

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<sup>1</sup> (1)Disasters, preparedness and Mitigation in the Americas, January 1993. SUMA special issue

- \* Daily reports for national authorities detail donors, addressees, type of supplies, etc.
- \* Donors receive immediate proof of delivery (via e-mail, Fax, etc.), when the addressee receives the shipment.

To attain this objective, all donations, regardless of their origin or addressee, should be processed by SUMA at their points of entry, before they are delivered to the addressee. This implies the adoption of operation policies and strategies by those organizations and institutions involved in relief management, whether governmental or non-governmental, before a disaster occurs.

As countries gain experience in operating SUMA, they use it to satisfy certain requirements, which perhaps were not foreseen in the original SUMA System, as in the case of local donors, or using a reception site both for receiving donations and administering distributions of the donations. Whatever the case may be, it should be emphasized that SUMA is not used only for large-scale emergencies that require international support, but also can be used locally when there is a need to mobilize supplies.

## Components of the System

The system is composed of three levels:

- \* SUMA CENTRAL
- \* SUMA Field Unit
- \* Warehouse Management

**SUMA CENTRAL** is designed to operate at the site where national authorities are managing a disaster or emergency.

At this level, the principal tasks are to:

- \* Establish parameters to be used by the Field Units, such as reception sites, shipment directories, define the main user, etc.
- \* Create Field Units
- \* Consolidate information sent by the Field Units
- \* Preparing reports to support the decision-making process and promote inter-institutional coordination.
- \* Maintain the system tables (lists).

The **FIELD UNIT** is designed to work at the points of entry where supplies arrive during emergencies, such as borders, harbors, airports, etc.).

The main tasks at this level are to:

- \* Sort supplies and identify them using labels in the categories of: **URGENT- IMMEDIATE DISTRIBUTION; NON-URGENT DISTRIBUTION; and NOT A PRIORITY ARTICLES.**
- \* Classify supplies by categories, subcategories and items
- \* Conduct consultations on selected items
- \* Prepare various reports on the contents of the shipments registered at that Field Unit
- \* Provide proof of delivery receipts for the addressees
- \* Consolidate data on diskettes to be sent to SUMA CENTRAL

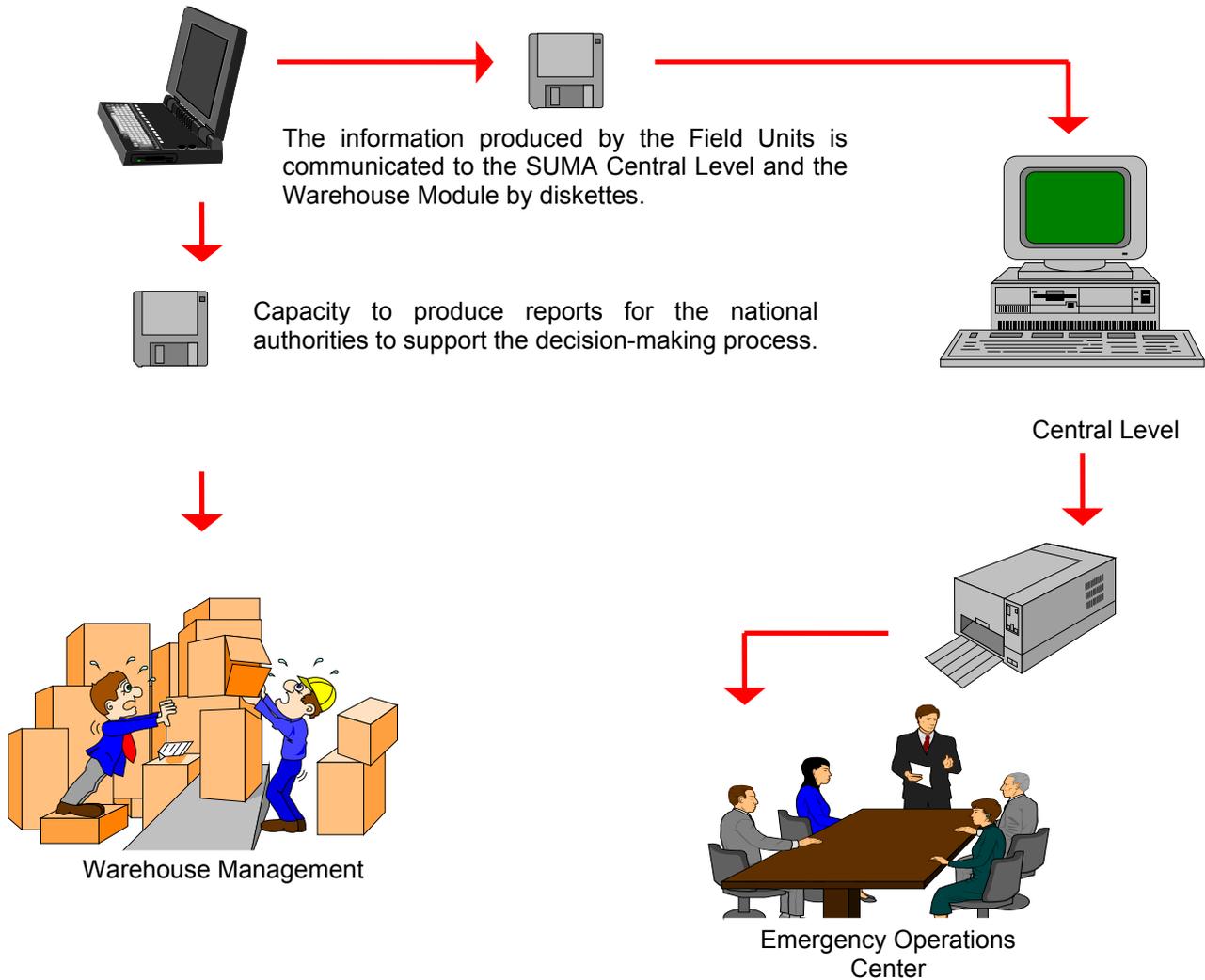
The SUMA Field Unit team also uses paper forms in case the computers fail, or if data collection requires their use.

The **WAREHOUSE MANAGEMENT MODULE** is a tool that registers the arrival and departure of supplies from storage centers or warehouses. The warehouses receive the supplies and related data by diskettes from the Field Units and Central level. In this way the organizations can manage and control the supplies that receives and coordinate with other organizations. For example, of a shipment of medicines belonging to the Red Cross being assigned to the Ministry of Health.

The main tasks carried out at this level are:

- \* Balancing the local inventory
- \* Preparing reports on existing supplies and deliveries, using a variety of parameters
- \* Following up on the inventory of subsidiary warehouses

The following diagram shows how the system works:



### The Consignment:

A consignment (or shipment) is a group of supplies, which arrive by the **same means of transport**, at the **same time**, with the **same sender**, and the **same addressee**. It is the basic reference unit for the System.

The **point of entry** is the place where all the consignments arrive: airports, harbors, land borders, warehouses, etc.

Let's take a look at some examples to illustrate these concepts, assuming that the supplies arrive **by the same means of transport**:

- ◆ A ship arrives with a load of eight tons of wheat, sent by the World Food Program to the Costa Rican Red Cross. It is a single article for a single organization, therefore it will be registered as one consignment.

- ◆ A plane arrives with consignments for several different addressees in Honduras, from various senders in Mexico.
  - \* The Civil Defense sends various supplies to the Honduras Emergency Commission.
  - \* The Mexican Ministry of Health sends medical supplies to its Honduran counterparts.
  - \* Honduran residents in Mexico City send to the Red Cross food and clothing.

Even though all supplies arrive on the same flight, from the same country, **they come from different organizations and have different addressees**, and must therefore be registered as **three different consignments**.

One organization might send supplies to four different destinations within the same country. Or because the size, the quantity of parcels or to facilitate the cargo, donations might be sent to a single consignee on four different flights. In both cases the supplies are registered as **four different consignments**.

## Activities in the work area

Before delivering supplies to the addressees, there are three general phases of work:

- Sorting
- Classification
- Taking inventory

## Sorting supplies

Supply management and distribution priorities are assigned in accordance with the supply requirements given by the Emergency Management Administration or by the Team Coordinator in the SUMA work area. These priorities depend on the type of disaster and the needs at that moment. For example, in case of an earthquake, medical supplies for the treatment of wounds and fractures would be priority, while in the case of floods the priority items would be food and water.

All the boxes and packages will be labeled, showing clearly their priority level. Additionally, health supplies will have green labels. The SUMA priority levels and colors are:

Priority 1 **URGENT - IMMEDIATE DISTRIBUTION:** These items require immediate distribution at the site of the emergency. Label color: **Red**.

Priority 2 **NON-URGENT DISTRIBUTION**: These items are not of immediate use in the emergency phase, but they may be of use later during reconstruction or development. Label color: **Blue**.

Priority 3: **NOT A PRIORITY ARTICLES**: Some supplies may be expired, damaged, useless or unidentifiable. They may arrive in combination with needed articles, making it difficult to classify them in the area of operations. The addressee should do classification of non-priority items after the emergency phase when time permits. Label color: **Black**.

In example, from the pharmaceutical products donated in the past decade in disasters occurring in the Americas:

- \* 15% were used immediately
- \* 15% were used after the emergency phase, having been stored in safe and appropriate places. This allows ulterior use.
- \* Approximately 70% were useless.



Medicines generally maintain their effectiveness from three to six months after the expiration date indicated. Depending on their importance in relation to the emergency, they could still be considered a priority item for immediate distribution. The fact that they are expired must be indicated and lab analysis must be done to certify their effectiveness. Health authorities will be called on to determine whether they should be distributed.

## Classifying supplies

The items, which can be received, will be classified according to ten predefined technical categories:

Pharmaceutical	Shelter/Housing/Electrical/Construction
Water and Sanitation	Logistics/Management
Health (Non Pharmaceutical)	Human Resources
Food and Drink	Agriculture/Livestock Industry
Personal Needs/Education	Unclassified

The consignment is conformed by items, which are its base unit. I.e., wheat, canned soup, aspirin and lidocaine are examples of items. A series of characteristics identify an item, such as commercial or brand name, presentation unit and packaging (tablets, kilograms, boxes or bags), total quantity received, etc.

Every item is related to a category or a sub-category specific. I.e., an item as an Ambulance will be classified into the category Health and the sub-category Patient Transport.



## Level 1: Categories

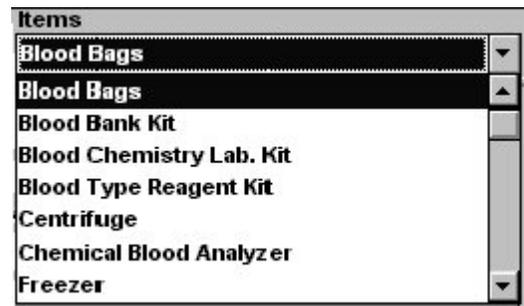
Each category is composed of a series of related subcategories

## Level 2: Subcategories



Each subcategory is composed of various items

## Level 3: Items



Registration will always be done on these three levels: category, subcategory and Item. Exceptions will be categorized under Unsorted, which only has two levels: category and general type of item

The Unsorted option, allows the operator to classify shipments with expired, useless items, or items that are too varied to classify on the spot. As mentioned previously, the addressee classifies these items once the human resources and time are made available, which could be during or after the emergency phase.

## Taking Inventory

This stage allows preparing daily reports to the national or local authorities on supplies received, specifying the consignee, the sender, classification categories, quantities, etc. This allows the addressee to make appropriate emergency management decisions, and to confirm the receipt of the donations to donors.

## 2. Installing and configuring the Warehouse Management Module

### Technical Requirements

1. The minimum computer requirements for implementing the Warehouse Management Module are as follows:

Computer Requirements	
Processor	486 or higher
RAM	12 Mb
Mouse	Required
Windows	3.1 or higher
Free space on Hard Disk Drive	40 Mb (minimum)
Printer	Your PC's Default
Floppy Disk Drive	3.5 in., 1.44 MB

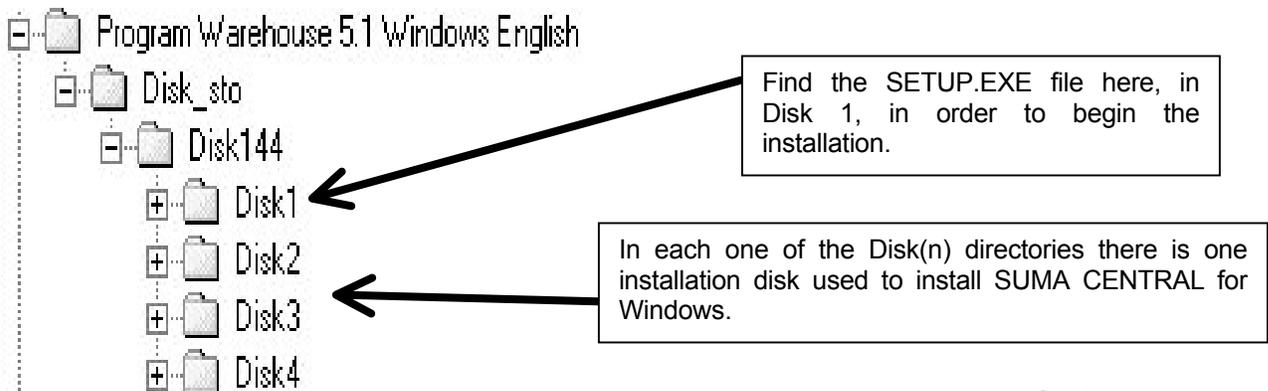
2. Verify that the time and date indicated by your computer are correct. This verification is important because the program will use these settings when saving and searching for information.
3. Verify that you have enough memory on your hard disk drive to install the Warehouse Management Module. If you do not have the minimum required memory, the program will not install and your computer will indicate an error message.
4. It is recommended that the computer on which you install the Warehouse Module be used only for SUMA operations. You can also maintain a word processor, spreadsheet software, labeling software and any other software that may be necessary.

### Installing SUMA STOCK

The SUMA Warehouse Management Module can be installed using diskettes or a CD ROM.

#### Installation using a CD ROM:

If you are using a CD to install the SUMA software, after accessing the CD ROM you will find a directory with the following structure:



**To install SUMA using a CD ROM, do the following:**

- a) Go to the directory \Disk\_sto\Disk144\Disk1, as shown in the picture on the last page, and execute the file **SETUP.EXE**. This will start the installation process for SUMA Central.

You will see a configuration screen that allows you to change the location on the hard disk drive where you will initiate the installation. The default location is the C Drive.

To create a series of installation disks from the SUMA CD ROM, do the following:

Copy the contents of each of the Disk(n) directories (1 through 7), as shown in the picture on the last page, to 3½-inch diskettes which will have the installation files for **SUMA**. Then, to install **SUMA**, place each of the diskettes into the A: drive, in sequential order, and execute the SETUP.EXE file.

To install the **SUMA STOCK** Module, verify that you have the four numbered diskettes labeled **SUMA STOCK**.

**Installation using Diskettes:****For Windows 95:**

Insert installation diskette N° 1 in the floppy disk drive, selecting the A: or B: drive depending on your computer.

Click on the Start button and select the Explore option (or go to Programs and choose the Windows Explorer program). Select the 3 ½ Disk Drive and press Enter.

Double click on SETUP.EXE to start the installation process.

The installer will ask where you would like the SUMA program to be installed on your hard disk. The default path is C:\SUMAWS51. The default name of the programs in this archive will be SUMA. If this is acceptable, click on Continue to complete the installation. The program will ask for the remaining diskettes as is necessary.

**If at some point during installation the MS-DOS window appears, click on Exit in the upper left-hand corner of the window to return to Windows. The SUMA application should now be installed. If not, you will get an Error message.**

## Alternatively, in Windows 95 or 98:

Select the My PC icon on the main Windows desktop by double clicking on it with the left Mouse button. Double click on the 3½-inch disk icon and select Setup. Follow the steps outlined above.

You may also click on Start and select Control Panel. Next, select **Add New Software** and follow the on-screen instructions, choosing **A:\SETUP.EXE**. Follow the steps outlined above.

## In Windows 3.x:

Go to the main menu of the **Windows Program Manager** and select **File / Run**. Click on the **Browse** button, choose A: \ and click on SETUP.EXE. This will launch the installation process.

After the last disk has been installed, the software will be fully installed on your hard disk drive, and the screen will open a window asking for the **Configuration Password** for the Warehouse Management Module. Type the password and press Enter.

**IMPORTANT:** This password will be required for process. Try to select a password that you can remember easily.

**IMPORTANT:** If you leave the SUMA program and you would like to restart it, do the following:

In Windows 95/98, press Start, then Programs. Look for SUMA in the list of programs and click on SUMA STOCK. In Windows 3.x, look for the SUMA program group and press Enter or double click on the SUMA STOCK icon.

## Starting a work session

To start a work session, select **START**, then **PROGRAMS**. Select **SUMA** and then **SUMA STOCK** from the Windows Taskbar.

The program presentation screen will appear as follows:

## Set Up Warehouse

Set Up Warehouse is the most important step when setting up the Module. Here, you must define a password, reset the program (if necessary) and identify the warehouse. The first step is to define a password:

The password is a safety device used to minimize the risk of unauthorized personnel making modifications or deleting data. After entering the selected password, the program will request confirmation. Enter the password a second time. If it does not match the original password, the program will return to the Main Menu.

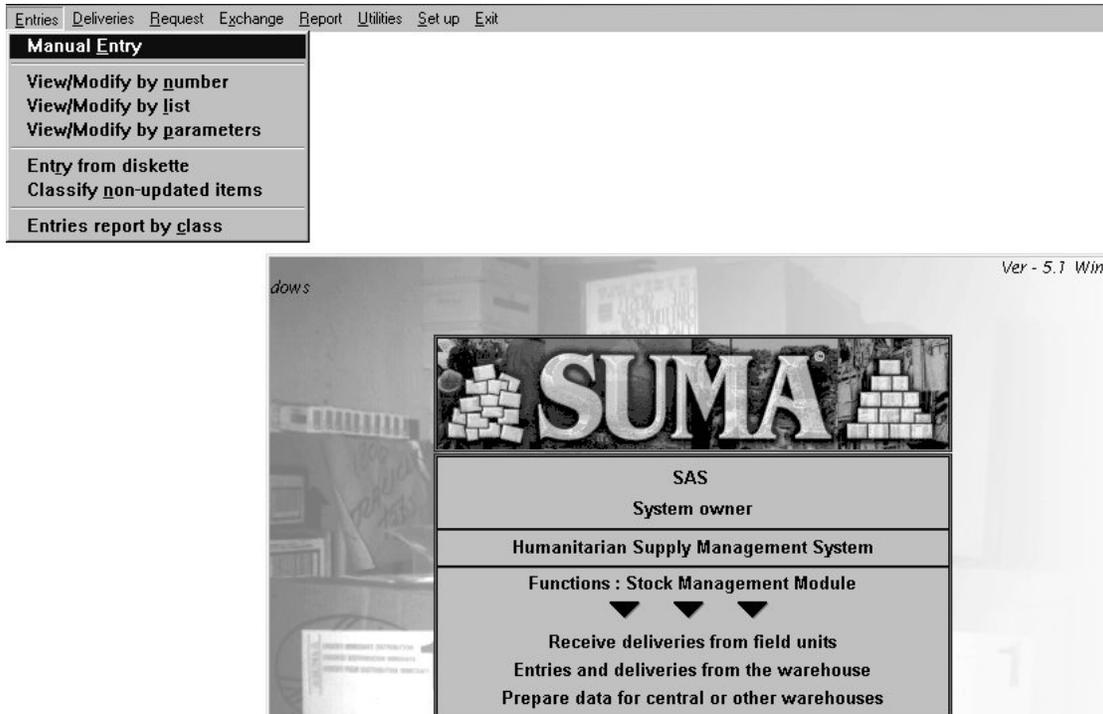
Once the password is confirmed, the specific information about the warehouse should be entered on the following screen:

- \* The SUMA program will automatically set the date.
- \* **Next issue:** is assigned by the program. This number corresponds to the next consignment of supplies to be registered.
- \* **Next receipt:** is assigned by the program. This number corresponds to the next arrival or delivery of supplies.

If you choose the option **<Save>**, the Warehouse Module will use the data entered on this screen as the default information.

## The Main Menu

On the Main Menu, you will find most of the necessary commands used in the different modules on incoming and outgoing data collected in the work area. They can be activated either with the keyboard or a mouse.



## Choosing Options

### Using the keyboard:

1. The first predefined option is **Entries**. To select another option, press the left arrow key (←) or the right arrow key (→) to move on the bar menu and to choose the desired command.
2. Press the down arrow (↓) or up arrow key (↑) to choose a command and then press <ENTER>. Alternatively, you can use the letters highlighted in the option titles (Hot Keys) to access command options directly.

### With the Mouse:

1. Position the mouse cursor on the heading of your choice and press the left button once to display the list of options.
2. Position the cursor on the desired command and press the left button on the mouse once.



You can adjust the colors of the Warehouse Module display by choosing **Utilities** on the menu bar. Select the option **Colors**, and choose the color you prefer.

## The Importance of Protecting Data

No software can offer total security for data and programs, especially considering the conditions under which SUMA teams work. The only way to protect data is to back up the data regularly on diskettes. The Warehouse Module has a backup mechanism and a tool to restore data in case of problems. These options are covered in the section on **Utilities**.

## Ending the Work Session

To end the work session, select **Exit** from the menu bar, and then the option **Exit this program**, as shown below:



Always end a work session with the option **Exit this program**. If you turn the computer off without exiting correctly, you may damage or destroy the files and archives of the program being used.

## Setting Up the Warehouse Management Module

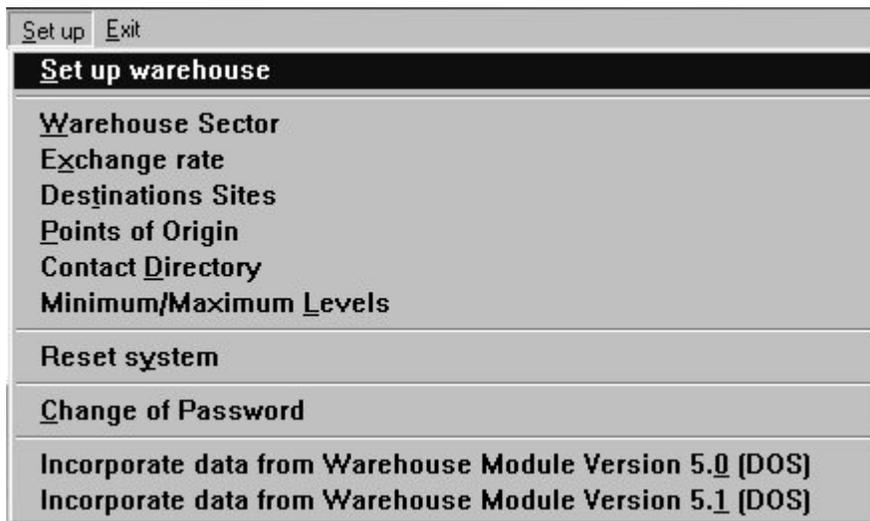
The Set up heading includes the necessary steps to provide the program with important specifications.



### **IMPORTANT . . .**

In order to use this Module you must first access the "Set Up" option that appears in the heading of the Main Menu.

The options available under **Set Up** are shown below:



## Warehouse Sector

The different Warehouse Sectors are defined with this option; for example: Medicine Sector, or sector G2.



### **IMPORTANT**

When receiving consignments, the program will ask you to name their location. For this reason, it is very important to have the sectors well defined. You can use the SUMA technical classification categories described in the introduction of this manual to classify different sectors.

When the screen for identifying warehouse sectors appears, select the <Add option>.

**WAREHOUSE SECTOR**

**Define warehouse sectors**

Medicine Sector

The menu at the bottom of the screen has four options that allow you to review registered sectors:

- <Top>**: Takes you to the first registry on the list of sectors
- <Previous>**: Takes you to the preceding registered sector (unless you are at the top of the list)
- <Next>**: Takes you to the next registered sector (unless you are at the end of the list)
- <Last>**: Takes you to the last registered sector

The option **<Browse>** allows you to see the entire list of sectors.

The other options have the following functions:

- <Add>**: allows the addition of a new sector
- <Save>**: saves the information entered
- <Cancel>**: cancels the information entered by the last registered user
- <Exit>**: takes you to the main menu

## Exchange rate

Traditionally the US dollar is the monetary unit of reference. SUMA allows you to access several exchange rates and will make automatic conversions.

In the WAREHOUSE MANAGEMENT MODULE, this value is incorporated in the following screen:

EXCHANGE RATE	
Name of currency.....	\$ US Dolar
Exchange Rate.....	1.00
Last Updated.....	/ /

Top	Previous	Next	Last	Browse	Add	Modify	Delete	EXIT
-----	----------	------	------	--------	-----	--------	--------	------

The conversion value results from dividing:

1 US dollar / Local exchange rate

## Destinations Sites

This option allows you to create a directory of destination or distribution points. This information is mainly used to fill in delivery forms.

MAIN DESTINATION OR DISTRIBUTION SITES	
DESTINATIONS SITES	
DILI HOSPITAL	

Top	Previous	Next	Last	Browse	Add	Modify	Delete	EXIT
-----	----------	------	------	--------	-----	--------	--------	------

## Points of Origin

The list in this section contains the majority of known countries, but because assistance can arrive from regions or provinces within a country, this module allows you to enter new places of origin.

**POINTS OF ORIGIN**

---

Coming from..... DARWIN

Sent by..... CARITAS AUSTRALIA

Top Previous Next Last Browse Add Modify Delete EXIT

## Contact Directory

Due to the management of emergencies from preceding events, it is often possible to predict which national and international organizations or companies may send assistance when a disaster occurs. It is also possible to predict which organizations typically receive this aid. The Contact Directory allows you to create a list of those contacts, as shown in the following screen:

**CONTACT DIRECTORY**

---

Category..... Organización No Gubernamental (ONG) ▼

Organization..... MSF

Name.....

Address.....

Telephone/Fax No.....

E-Mail/Others.....

Country..... <<< Desconocido >>> ▼

Remarks.....

Top Previous Next Last Browse Add Save Cancel EXIT

## Minimum/Maximum Level

There are three administrative concepts used to determine the minimal and maximal stock levels of items according to, among others, their frequency of use, importance, availability of transport, and possibility of acquisition. These concepts are the:

- **Minimum stock level:** the minimally acceptable quantity of a product
- **Reorder point:** the minimal quantity of a product below which more must be procured, (not necessarily the minimum stock level).
- **Maximum stock level:** the maximum quantity that the warehouse is able to stock based on storage capacity, rotation, importance and administrative / production costs.

The Warehouse Module allows you to use these critical administrative criteria to assign Minimal/Maximal Levels. This is accomplished using the standard supply classifications of categories, sub categories and items. Two basic procedures are used to do this:

1. Selection of items
2. Determination of minimal and maximal levels and reorder points for the selected supplies

This procedure is done on the following screen:

The screenshot shows a dialog box titled "MINIMUM/MAXIMUM LEVELS". Inside, there is a section titled "SELECT FILTER PARAMETERS". This section contains three labels: "Category.....", "Subcategory.....", and "Item.....". The "Category" dropdown menu is open, displaying a list of categories: "Pharmaceutical", "Water and Sanitation", "Health (Non-Pharmaceutical)", "Food and Drink", "Shelter/Housing/Electrical/Construction", "Logistics/Management", and "Personal Needs/Education". At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

At any level you can choose the option **ALL** to access all the subcategories or items of a given category.

Once the parameters are defined, the minimum and maximum levels and the reorder points can be entered in their cells, as shown in the following screen:

Category.....Pharmaceutical  
 Subcategory.....All  
 Item.....All

Subcategory	Item	<<MINIMUM>>	<<REORDER>>
Anaesthetics	Bupivacaine		
Anaesthetics	Bupivacaine		
Anaesthetics	Bupivacaine		
Anaesthetics	Ketamine		
Anaesthetics	Lidocaine		
Anaesthetics	Thiopental		

29/07/2000      Ctrl-W = Switch    Press <ESC> to exit      17:31

As you can see in the above example, for each kind of item there are several measuring units that can be used to define the stock inventory. These depend on the measuring units defined by the warehouse administrators according to local norms.

Once the criteria are defined, the system will ask you to confirm the changes:

**Do you want to save the new stock levels?**

## Resetting the System

Resetting the system prepares the system to receive information on a new emergency, eliminating all data on the previous emergency. The warehouse module will then be ready to initiate the set-up process again.



Be very careful when using this option. It will delete all data entered. It is not possible to retrieve these data afterwards.

To reset the system, type the password that you initially entered during set-up.



If the correct password is entered and **<OK>** is chosen, the program will present two more confirmation screens. Following the confirmation, all warehouse data previously registered will be deleted and it will be necessary to set up the system again.



If there are data on a previous emergency, the program allows you to save this information on diskettes.

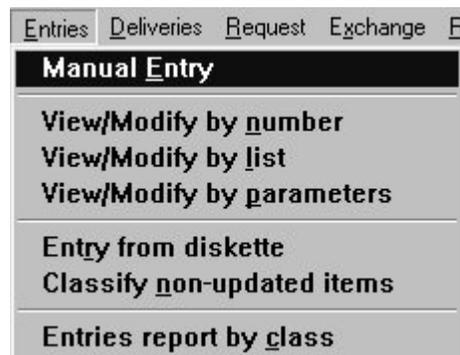
### **Incorporating data from the Warehouse Management Module 5.0/5.1**

Version 5.1 allows you to incorporate data from the DOS version 5.0 or 5.1. This will enable you to update the system without entering all information again. The system will display the following screen:



### 3. Registering Incoming Supplies

The options under the **Entries** heading on the Main Menu are:



#### Manual Entry

There are two ways to register incoming supplies to a warehouse:

1. **Manual Entry:** Supply data are entered individually as they enter the warehouse.
2. **Entry from Diskette:** Supply data are entered from a diskette. You will learn this process later in this section.

The first step in manual entry is to record information about the delivery for each entry. Consider the **Entry** process in the Warehouse Management Module to be nearly identical to the send process you learned in the Field Unit Module. It is used to register one or more consignments, which arrive by the **same means of transport**, at the **same time**, and from the **same consignee or donor**.

WAREHOUSE.....SAS	
Receipt No.....000001	Direct input
Date of this entry D/M/Y.....29/07/2000	
<input type="radio"/> Purchase <input checked="" type="radio"/> Donation <input type="radio"/> Reenter	
Precedence Directory	
Coming from.....	
Sent by.....	
Driver Name.....	
I.D.....	
License plate number.....	
Receiver's name.....	SAS
Remarks.....	
Estimated total weight Kg >>	0 KG
<input type="button" value="Save"/>	
<input type="button" value="Exit"/>	

Partial deliveries registered at the Field Unit or Central Level can be entered using the **Incoming** option. In the Warehouse Module, it is not necessary to know the consignment number assigned by the Field Unit to proceed with the process.

The program automatically assigns a Registration Number, the Date, and the Hour of Arrival.

Once the entry is defined by these criteria, you can begin to enter information about the specific supplies. This screen operates the same way as that used in the Field Unit for making deliveries.

The screenshot shows the 'Items details' window. At the top, it displays 'Entry No.....000001' and 'Coming from.....DARWIN'. Below this, there are two lists for category selection: 'Alphabetical List' with options like 'Pharmaceutical products', 'Other supplies', 'Human resources', and 'Unclassified items'; and 'Technical Categories' with options like 'Pharmaceutical', 'Water and Sanitation', 'Health (Non-Pharmaceutical)', 'Food and Drink', 'Shelter/Housing/Electrical/C', 'Logistics/Management', 'Personal Needs/Education', 'Unclassified Items', 'Human Resources', and 'Agriculture and Livestock In'. To the right, there are input fields for 'Category', 'Subcategory', and 'Items'. At the bottom, there is an 'Options' section with buttons for 'Add an item', 'Modify selected item', 'Erase selected item', 'Category Overview', 'View all items in this Category', 'View all items in document', 'Return to Entry data', and 'Return to Main Menu'.

Searching for categories, subcategories and items can be done with the keyboard or the Mouse, as described:

#### With the keyboard:

1. Press the left arrow key (←) or the right arrow key (→) to move through the list of options.
2. When you wish to select something, press <ENTER>.
3. Once an option is chosen, the other two options are deactivated and it will be impossible to access them with the arrow keys.

**With the mouse:**

1. Position the cursor on the desired option and press the left button once to activate this field.
2. Point on the field, which will identify the option you have chosen, and press the Mouse's left button once to begin entering data.

**Data input by Alphabetical Listing**

When you select one of the four fields and press <Enter>, you will have the option to begin inputting data by **Alphabetical Listing**:



To classify an item using this option, do the following:

**With the keyboard:**

1. Move the down arrow key (↓) or the right arrow key (→) until you reach the selection box (note that it will change color or tone). Press <ENTER>.
2. Note that you will have to choose one of the four categories in the Alphabetical List. (Note however, that items listed as OTHER SUPPLIES are grouped into seven categories.) Again, press <ENTER> to choose one of the options under any of the headings, if you have not already.
3. An alphabetized list will appear with the names of the items in this category.
4. Press the down arrow key (↓) or the up arrow key (↑) to move through the options and stop on the desired item. Press <ENTER> to make your selection or press <ESC> to cancel the operation and return to the Main Menu.



There is a more efficient alternative to this kind of search. It is called an **Incremental Search**. See below for more information.

An **Incremental Search** allows you to find an item that requires classification from any position on the list by typing the **first letters** of its name.

As you type each letter, the selection bar will move through the list. The selection bar will move to the end of the list if an item is not listed. For example, if you type **amp**, to register a consignment of Ampicillin, you will get closer to the ampicillin option with each letter that you type. The result of this search is as follows:

Definition of Search Criteria Screen

The screenshot shows a window titled 'Items details' with the following content:

Entry No.....000001  
 Cor.....

Select item and press ENTER

Items	Subcategory
Amidotrizoate	Radiocontrast Media
Amikacin	Antibiotics/Antifungal
Amiloride	Diuretics
Aminophylline	Antiasthmatics
Amitriptyline	Psychotherapeutic
Amoxicillin	Antibiotics/Antifungal
Amphotericin B	Antibiotics/Antifungal
Ampicillin	Antibiotics/Antifungal
Anti-D Immunoglobulin	Vaccines/Immunologicals
Antihaemorrhoidal Drugs	Gastrointestinals
Antiscorpion Sera	Vaccines/Immunologicals
AntitetanusImmunoglobulin	Vaccines/Immunologicals

» Human Resources  
 » Agriculture and Livestock In

Return to Entry data  
 Return to Main Menu

A selection bar is visible on the left side of the list, currently highlighting the row for 'Amphotericin B'. A line points from the text 'Selection bar' below to this bar.

You can observe what you have typed in a window above and to the right of the Selection Box. If you make a mistake and the bar goes to the end of the list, or if you want to change what you have typed, use the **<BACKSPACE>** key to delete characters. Press **<ENTER>** to select an item and return to the

main editing screen, or press <ESC> to end the operation and return to the Main Registration Screen.

**With the mouse:**

1. Place the cursor on the selection box.
2. Press the left button on the mouse and maintain pressure.
3. Move through the list and place the cursor on the name you are looking for, and release the button. The list of items related to the chosen option will appear on the screen.
4. The mouse will only let you select one option on the list. Press <ENTER> to select it. In order to make it possible to do an Incremental Search, you must release pressure from the button on the Mouse.



Please note that when you return to the Main Registration Screen, you will see your selected item and its code, as well as the three-level classification for that item.

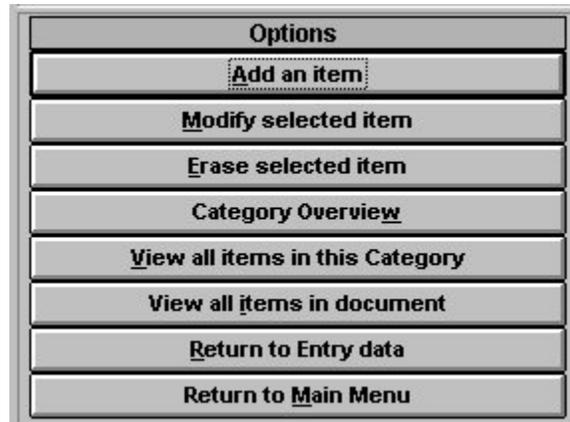
## Data Input using Technical Categories

When selecting this option you may choose items from one of the numerous Technical Categories. The Technical Categories box is as follows. Choose items accordingly.



## Registering Item Information

Once an item is classified, either by using the Alphabetical List or Technical Categories box, place the cursor on the **Add an item** option:



This menu bar is divided into two general schemes:

- 1) Processing; which allows you to create, consult, modify or erase the classification, and classification of items
- 2) Consultation by category; which allows you to select an item previously registered, to modify it using the above options, or to obtain information about the category.

The menu options are:

- **Add an item:** This allows you to include a selected item on the database. After pressing <ENTER> the **characteristics screen** will request brand, presentation unit, total quantity, etc. The following figure shows the characteristics for pharmaceutical products:

Category.....	Pharmaceutical			Entry No.:000001
Subcategory.....	Antibiotics/Antifungal			
Items.....	Amphotericin B			
Brand name.....	Amphotericin B			
	<b>Form</b>	<b>Route</b>	<b>Strength</b>	
Presentation unit.....	Vial	Injection	50 mg in vial	
Total quantity.....	556   Vial(Injection)50 mg in vial			
Packaging information.....	556 UNITS			
Items Estimated Value.....	0.00	\$ US Dolar	USD:	0.00
Expiration date D/M/Y.....	/ /			
Remarks.....				
	<b>Warehouse sector</b>	<b>Label language</b>	<b>Priority</b>	<b>Refrigeration</b>
	Medicine Sector	English	Immediate distribution	Not required
Save item		Return		

- **Modify selected item:** If an item has already been registered as part of a consignment, this option allows you to consult general information on it, such as its name and its presentation units. To modify this information, press <ENTER> while the item is highlighted. The characteristics screen will display its data.



Be very careful when modifying data using this option. Remember that supplies with different presentation units, and/or different administration methods, are not the same items. For example, Ampicillin in ampoules is not the same as Ampicillin in tablets. There are also different types of ampoules and tablets.

- **Erase an item selected:** Allows you to delete information about a registered item. To erase, select the item and press <ENTER>. The characteristics screen will appear, but you will not have access to the editing fields. You will only have access to two options shown at the bottom of the screen, from which you must make your choice.
- **View all items in this Category:** Allows you to see the contents of a category of a specific shipment. If you wish to check or modify the information, select the item and press <ENTER>. Then choose any of the options to process the item.
- **Category Overview:** Presents a screen indicating, by category, which of the items have been registered. This facilitates the consultation and search for information.
- **View all items of the document:** Allows you to see a summary list of all items in the entry.
- **Return to entry data:** This option returns you to the header of the entry.
- **Return to main menu:** Returns to the Main Menu.

## Registering Pharmaceutical Products<sup>2</sup>

A significant addition to Version 5.1 of the SUMA software allows you to add new pharmaceutical items. You can do this by entering the pharmaceuticals in the Technical Categories box and selecting "Defined by user", one of the listed options.

<sup>2</sup> Categories, definition of presentation units, route and strength are based on the publication: The Use of Essential Drugs: Sixth Report of the WHO Expert Committee. WHO Technical Report Series - 850. Geneva: 1995.

Once you have selected **Add**, you will access the item's characteristics screen. In the space marked **Brand Name**, register the brand or commercial name of the registered item.

If it does not have a commercial name, the program will use the item name. In this case, press <ENTER> again and proceed.

The spaces for the **Presentation Unit** have three fields with **obligatory registration: Form, Route and Strength**. (See below).

Category.....	Pharmaceutical		
Subcategory.....	Antibiotics/Antifungal		
Items.....	Amphotericin B		
Brand name.....	Amphotericin B		
Entry No.:000001			
	<b>Form</b>	<b>Route</b>	<b>Strength</b>
Presentation unit.....	Vial	Injection	50 mg in vial

Under the heading **Form**, the most common presentation units for that particular medication will be displayed in alphabetical order (e.g., ampoules, cream, drops, gel, etc.) Additionally, you can insert your own units under **<Defined by user>**.

In the case that the standard presentation units do not correspond to the item being processed, select **<Defined by User>** and another list of possible presentation units will be displayed. If you still do not find the units you want, go to the end of this second list and press enter on **<New Form>**, which allows you to enter a new unit of measure.



Search thoroughly before defining a new form, route, strength and presentation unit on the list. Do not make duplicates of existing choices. If you are not sure, ask team co-workers or specialists in the work area for help.

Any choice you make here will affect the other two. For example, if the pharmaceutical is defined as **Tablets**, the **Route** field will list the option **Oral**, and the **Strength** field will show some of the most common potencies of that medicine. **Route** and **Strength** are used respectively to **Form** field.

The field **Total Quantity** is part of the **obligatory registration** and shows the amount of a medicine received, starting from the smallest units, which are defined in the **Form** field. Assuming the defined unit is tablets, the total quantity should be calculated in tablets. Note that the program automatically provides the unit of measurement for the total quantity based on the information entered under the Form, Route, and Strength fields.

Under **Packaging Conditions**, you should register units beginning with the smallest and ending with the largest. For example, if the medicine comes in 5 boxes with a thousand ampoules in each, the registration should be:

1000 units (or ampoules) X box X 5

The general information cells have four fields for item information:

Warehouse sector	Label language	Priority	Refrigeration
Medicine Sector	English	Immediate distribution	Not required
<b>Save item</b>		<b>Return</b>	

The option **Warehouse Sector** corresponds to the area/region where supplies are stored.

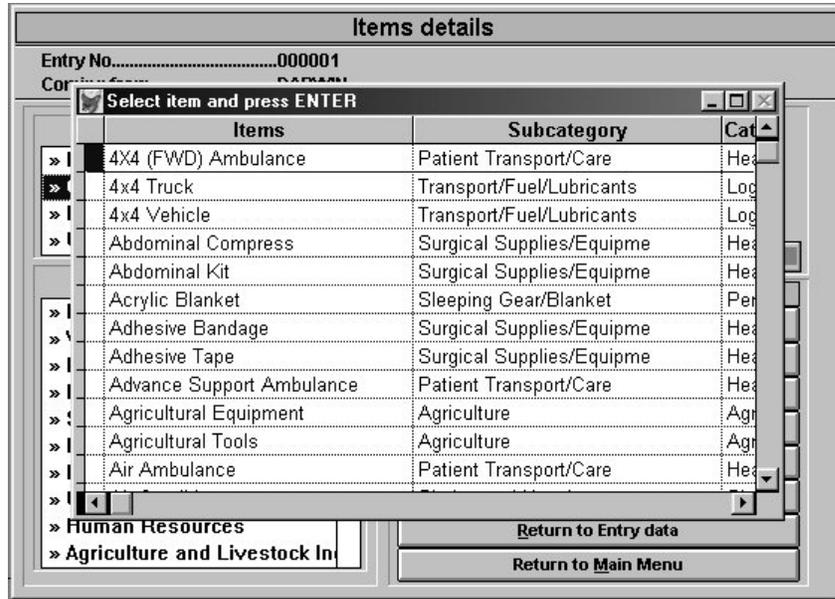


Once the information has been registered, the program provides the options **Save Item** and **Return**, which allow you to save information on the item and to return to the Main Registration screen. If you choose **Return** without saving the information first, you lose the information entered up to that point. Be careful!

## Registering other supplies

The following entries should be made using the Alphabetical List option. Non-Pharmaceutical items are registered similarly and have the same kinds of registration screens. The categories are:

- \* Water and Sanitation
- \* Health (Non Pharmaceutical)
- \* Food and Drinks
- \* Shelter/Housing/Electrical/Construction
- \* Logistics/Administration
- \* Personal Needs/ Education
- \* Agriculture/Livestock Industry
- \* Unclassified (Medicines)
- \* (Human Resources)



Once you have initiated the search mode, locate the desired item, and press <ENTER>. After you select **Add** on the **Options** menu, you will see the characteristics screen for items under the **Other Supplies** heading:

Category.....Health (Non-Pharmaceutical)  
 Subcategory.....Patient Transport/Care  
 Items.....4X4 (FWD) Ambulance  
 Description.....4X4 (FWD) Ambulance

Entry No.:000001

---

Presentation unit.....Units

Total quantity.....0 Units

Packaging information.....

Weight Presentation Unit.....0.0000 (Weight in KG)

Total Weight in KG.....0.00

Items Estimated Value.....0.00 \$ US Dolar USD: 0.00

Expiration date D/M/Y...../ /

Brand/Model.....

Serial number.....

Capacity/Unit of capacity.....

Cycles/Voltage.....

Remarks.....

Warehouse sector  
FOOD

Priority  
Immediate distribu

Save item      Return

To define the presentation unit, various options are available, according to the type of item. If the unit options are not adequate, either because they do not correspond to the actual unit or because you want to be more specific in describing the item, use the **<Defined by User>** option.

For example, when registering water pumps, you can either choose to record the presentation unit as **“Units”** or **<Defined by User>**. If you decide on the latter, you will see a list with existing definitions or you have the option to create a new unit:

The new unit will be registered in the program list and can be reused for other categories within the group.

You must enter a quantity under **Total Quantity**. If you do not, the program will not allow you to save the information.

Technical information corresponds to specific characteristics of an item. If one or several of these cells are not applicable, simply press <ENTER> on each one, or move the cursor with the arrow keys (or Mouse) to bypass them.

The Weight, Presentation of Unit and Total Weight are all associated with the table of measures that is defined at SUMA CENTRAL and the total weight is calculated automatically based on the total quantity.

Once the information has been registered, the system will ask if you wish to **Save** the item.



Remember, if you choose **Return**, you will lose the information entered up to that point if you have not already saved it. Be careful!

## Items Defined by the User

In previous sections, we mentioned that the Field Unit, Central Level and the Warehouse Module that comprise the SUMA system have a predefined list of items, ordered by categories and subcategories. In emergency situations, where SUMA has been implemented, this list has proved to be complete enough to register the majority of emergency supplies. However, there are always exceptions.

The option **<Defined by User>** can be used if an item does not appear on the list or if you want to provide more specific information.

Some items, because of their unique use, have not been defined individually but are listed as generic items. For example, the item “drill” has not been defined in the subcategory **Construction** as a specific item. However, it can be registered under the description: **Tool Kit**. Other articles can be registered in a single generic group. For example, if you receive markers of various colors, sizes and brands, it is not necessary to define them separately (red markers, black markers, fluorescent markers etc.) It is sufficient to define an item **marker** and later specify details in the appropriate fields.



Before registering an item in the <Defined by User> heading, be sure that you are classifying it correctly and that existing definitions are inadequate. If you have doubts, ask another team member. Avoid duplicating information. It will cause problems when locating and interpreting consultations and reports.

## General Remarks about the <Defined by User> Option

- The category **Unclassified** does not have this option.
- The option can only be used at the item level. The user cannot define new categories or subcategories. This option should not be confused with the definition of new storage sectors.
- From the "**Item Details Screen**", the option can only be accessed by choosing **Technical Categories. - Unclassified**
- Once the item has been defined, it is incorporated into the program lists so that it will be available for later use.

To define an item:

- Select the option **Technical categories** from the Main Menu (under managing items) and press <ENTER> to select it.
- Select the category and subcategory.
- In the item selection area, choose **Defined by User**. This will appear as follows:

**Items details**

Entry No.....00001  
Coming from.....DARWIN

<p><b>Alphabetical List</b></p> <ul style="list-style-type: none"> <li>» Pharmaceutical products</li> <li>» Other supplies</li> <li>» Human res</li> <li>» Unclassifi</li> </ul> <p><b>Techni</b></p> <ul style="list-style-type: none"> <li>» Pharmace</li> <li>» Water and</li> <li>» Health (No</li> <li>» Food and</li> <li>» Shelter/Housing/Electrical/C</li> <li>» Logistics/Management</li> <li>» Personal Needs/Education</li> <li>» Unclassified Items</li> <li>» Human Resources</li> <li>» Agriculture and Livestock In</li> </ul>	<p><b>Category</b> Water and Sanitation</p> <p><b>Subcategory</b></p>
--	---

<<< New item >>>

\_\_\_\_\_

Category Overview
View all items in this Category
View all items in document
Return to Entry data
Return to Main Menu

When selecting **Add an item** from the menu, a window will appear in which you can enter the name of the new item. Type it and press <ENTER>.

## Registering Unclassified Items

The Unclassified option allows you to classify expired, unidentifiable or useless items. This option is also meant for items that are difficult to be classified in the work area. You will hopefully have time to classify these items once there are sufficient human resources and time, during or after the emergency.



You must **always** register Unclassified Items no matter how useless they seem to be. The information on them is important for notifying the donors of their delivery, collecting statistics on what was received, and for defining national policy for solicitation, reception and handling of supplies.

Items in the Unclassified category are handled differently than other supplies. There are two levels: Category and Item.

<p><b>Alphabetical List</b></p> <ul style="list-style-type: none"> <li>» Pharmaceutical products</li> <li>» Other supplies</li> <li>» Human resources</li> <li>» <b>Unclassified items</b></li> </ul>	<p><b>Category</b> Unclassified Items</p> <p><b>Subcategory</b> Mixed</p> <p><b>Items</b> Mixed</p>
---	---

Registering information on these items requires:

- A brief description of the content, the condition and any observation that you consider to be important. These should be entered in the **Details** field.
- Registration of the quantity of the item received in two fields:
  - **Number of pieces:** the total quantity of bags, boxes, etc.
  - **Total quantity:** the weight of the packages in Kilograms, if known.

For example, if you receive a load of assorted wet clothes, you should do the following:

- Using the mouse or keyboard, move the cursor to the **Alphabetical list or Categories** section and select Unclassified (best done if you access this through the Technical Categories box).
- After you select Unclassified, go to the Subcategory field and choose the item that corresponds best to wet clothes. The program will deactivate the Items field. Remember that the classification is done at only two levels.
- Press <ENTER> on the **Add** option in the Options menu.
- Finish the registration by including entries on the following fields: **Details, weight kg, number of pieces, warehouse sector and priority.**

The characteristics screen will look like this:

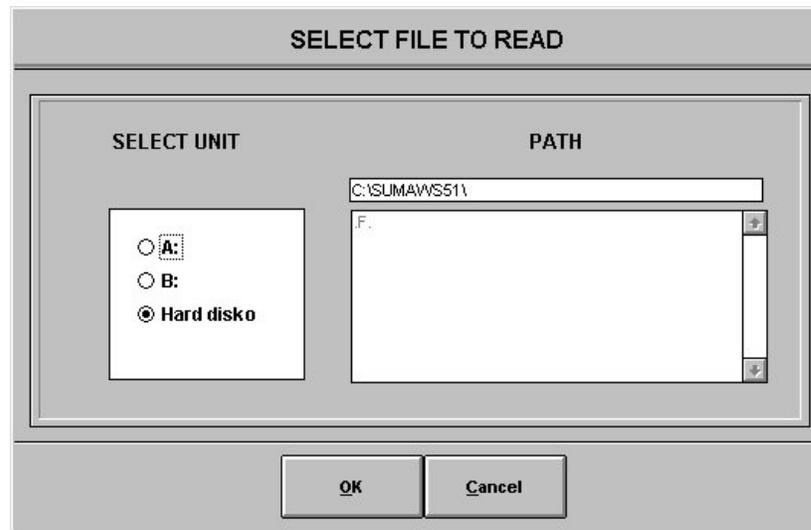
Category.....Unclassified Items	Entry No.:000003
Subcategory.....Mixed	
Items.....Mixed	
<b>Details</b>	
<input type="text" value="MIXED"/>	
Weight-Kg.....	<input type="text" value="250"/>
Pieces/Boxes/Bags.....	<input type="text" value="56"/>
Warehouse sector.....	<input type="text" value="FOOD"/>
Priority.....	<input type="text" value="Non-priority"/>
<input type="button" value="Save item"/> <input type="button" value="Return"/>	

## Registering Information Using a Diskette

Shipments of supplies may arrive accompanied by diskettes that contain information on the deliveries. SUMA allows you to load and read this information automatically. The data may come from a Field Unit or from another Warehouse. If there are items that cannot be classified, they should be temporarily stored and processed when conditions permit.

You must begin by choosing the disk drive where you will download information. Be sure that the unit is ready and that you have a large enough diskette. You must determine the files are on the hard drive of your computer (which drive), and then specify the path to access the appropriate directory.

**Important:** Specify the path to the subdirectory and remember to insert a backslash (\) at the end of the designated path. If there are files in this subdirectory, they will be displayed. The following screen illustrates how to access files on the hard drive:



Once the file is accepted, the program will display a window identifying the entry:



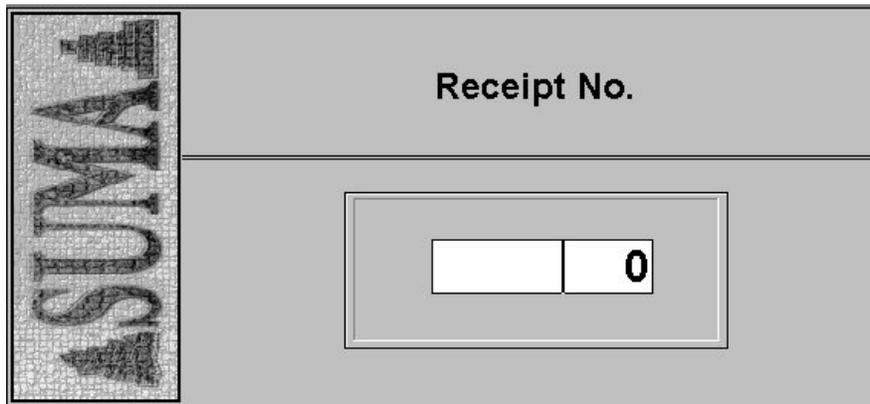
## 4. Consulting and Modifying Entries

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The options **View/Modify by number**, **View/Modify by list** and **View/Modify by parameters** permit access to the same screens you have learned to use for Manual Entry.

### Consultations and Modifications on Specific Entries

The option **View/Modify by number** allows you to access an entry if its entry number is known. The following screen allows you to key in the number of the entry:



The screenshot shows a software interface with a grey background. On the left side, there is a vertical banner with the word 'SUMA' written vertically in a stylized, textured font. The main area of the screen is divided into two horizontal sections. The top section is a header with the text 'Receipt No.' centered. Below this header is a large rectangular input field. Inside this input field, there is a smaller white rectangular box containing the number '0'.

If the number does not correspond to any of those registered, the program will return to the Main Menu and will display a message indicating an error in the search. Check the number. If you are unsure of the number, note the other means of consultation described in this section. If the number is valid, the program will present a screen identifying the entry.

To conduct consultations or modifications from the main screen to manage items, follow the same procedure used for creating item entries:

To check the details about a specific item, select the item, go to the option **Modify by item selected** and press <ENTER>. You will have accessed a screen that lists the item's characteristics and the total quantity. If you press <ENTER> again, you will go to the characteristics screen. Use the option **View all items of document** to get here more efficiently.

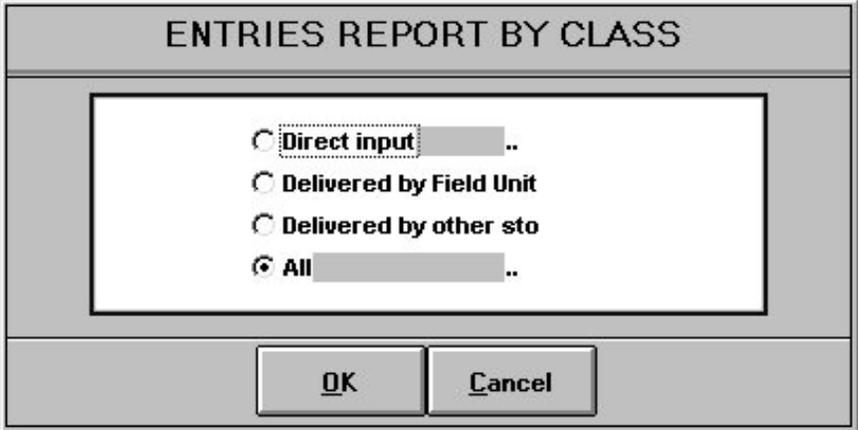


After you define the parameters and select OK, the program will display a list of selected entries.

If you wish to make a query or edit without considering date ranges, simply press <ENTER> in the blank fields, or select **All**.

## Entries Report by Class

This is the same as a search/edit/report by parameters. The option **Entries Report by Class** makes it possible for you to see what types of supplies have arrived in a given time period and in a specific class:



The screenshot shows a dialog box titled "ENTRIES REPORT BY CLASS". It contains a list of four radio button options: "Direct input ..", "Delivered by Field Unit", "Delivered by other sto", and "All ..". The "All .." option is selected. At the bottom of the dialog are two buttons: "OK" and "Cancel".

For example, if you want to know what types of supplies have arrived in the Personal/Education category during a certain timeframe, you need only define the selection parameters as shown on the following screen.

Remember that if you choose **All**, the program will list the entire contents of the category or subcategory.



Page Preview

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**HUMANITARIAN SUPPLY MANAGEMENT SYSTEM**

---

**ORGANIZATION : SAS**

---

**NAME OF THE WAREHOUSE : SAS**

---

**ENTRIES REPORT BY CLASS**

---

Report at date DMA 29/07/2000  
 From date (DD/MM/YY) / /  
 To date (DD/MM/YY) / /  
 Category PHARMACEUTICAL  
 Subcategory ALL  
 Item ALL

---

Mode of entry: 1= Delivered by Field Unit 2= Delivered by other stock 3= Direct input

Subcategory	Item	Sent	Received	Available	Presentation unit	Brand name	Input
Antibiotics/Antifungal	Amphotericin B	566	566	566	Vial Injection 50	Amphotericin	29/00
		<b>566</b>	<b>566</b>	<b>566</b>			
Diagnostic Agents	Fluorescein	56	56	56	Eye Drops Topical	Fluorescein	29/00
		<b>56</b>	<b>56</b>	<b>56</b>			

**OUTPUT TO:**

---

**Send to printer**

**See on screen**

REF:REPOENTVM\_REMD1

# 5. Direct Deliveries

Using this option, items can be delivered directly, as shown below:



To make a direct delivery, select the **Deliveries** option at the main menu, and then select the **Deliver Items** option.

Complete the form (illustrated below) by filling in *all* required information and then select **SAVE** to enter details on the items to be delivered:

 A screenshot of a 'DELIVERY FORM' input screen. The form contains the following fields:
 

- Request No.....000000
- Delivery No.....000001
- Date of this delivery.....29/07/2000
- Destination.....DILI HOSPITAL (dropdown menu)
- Sent by.....ANN JONES
- Driver Name.....ANN JONES
- I.D.....C. 2323256
- License plate number.....
- Details of authorization.....UNIMET
- Remarks.....

 At the bottom of the form are two buttons: 'Save' and 'Cancel'.


 A screenshot of a continuation screen for the 'DELIVERY FORM'. It shows:
 

- Delivery No..... 000001
- Destination..... DILI HOSPITAL (dropdown menu)
- Order By:
  - F2:Category
  - F4:Item
  - F6:Locate Item

 Below these fields are two buttons: 'Items to deliver' and 'Continue'. At the bottom of the screen is a logo for 'SUMA' with a stylized 'S' and 'A' containing mountain-like shapes.

Select **Items to deliver** to enter the quantities to be delivered. Fill in the "TO BE DELIVERED" column with the quantities. Then press **Esc** to exit.

**DELIVERY FORM**

Delivery No..... 000001

Destination..... DILI HOSPITAL

Order By:  
F2:Category  
F4:Item  
F6:Locate Item

Type the quantities to deliver to this destination Press <ESC> to Exit

Item	Description	Category	Q.Remaining	TO BE DELIVERED	Pre
Amphotericin B	Amphotericin B	Pharmaceutical	556	0	Via
Fluorescein	Fluorescein	Pharmaceutical	56	0	Eys
Clothing	Clothes	Unclassified Items	200	0	Pie

The program will ask you the following confirmation: "**Did you finish delivery?**" You must press **Continue** to confirm the quantities to be delivered.

When you have finished the confirmation, you will be able to print the delivery form.

## Entering Requests

The heading **Request**, on the Main Menu, has options for registering requests for items. However, you cannot **fulfill** requests for items in this heading. The available options are:

Request Exchange Report Utilities Set up Exit

**Enter a request**

View/Modify by request number

View/Modify by request list

Consult/print request

REPLY REQUEST ▶

You must begin by identifying the organization that is requesting goods. Then, you must define the characteristics of the request.

**REQUEST**

Request No..... 000001

Request status..... Requested

Date of this request..... 31/07/2000

Organization..... CARITAS

Destination..... DILI MUNICIPAL HOSPITAL

Remarks..... URGENTLY NEEDED FOR PEDIATRIC WARD

Save      Cancel

The options **View/Modify by request number** and **View/Modify by request list** permit you to access the same screens you used for Manual Entries.

## To Create a Request

The first step in creating a request is to provide information about the request. As with the “Entries” option, the program will assign a consecutive number automatically for each request. It will also assign the date and time of registration.

The **Organization** should be filled with the name of the requesting organization. If you cannot find an organization in the list provided, select **New Organization** to enter a new name. This field will also be available for later requests. Follow the same procedure for the **Destination** field. Now you must list the supplies that are being requested. The screen is the same as that used for Manual Entry. You can use **Alphabetical Lists** or **Technical Categories** to record information about each item. When a new item is added, the following screen will appear:

**Items details**

Request No.....000001

Destination.....DILI MUNICIPAL HOSPITAL

Category.....Pharmaceutical

Subcategory.....Antiparasitics/Malaria

Items.....Albendazole

Description/Quantity..... 1 tin of 1,000 tabs

Save item      Return

When you select **Save item** at the bottom of the box, the program will return to the registration screen to repeat the process. To return to the main menu, choose **Return to Main Menu**.

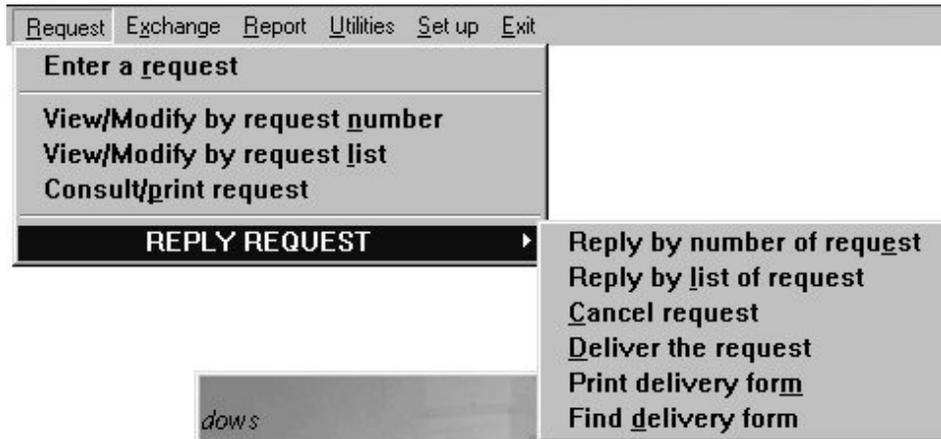
## **Printing the Request**

The procedure for printing requests is done in the following way:

1. Choose a range of dates in the date range parameter, or leave it blank in order to consider all dates.
2. Choose an organization.
3. Highlight the desired request from the list of requests displayed by the system, and press <ENTER>.
4. Print the desired document.

## 6. Authorizing the Delivery of Supplies

The options under the **Request** heading allow you to respond to requests for supplies that have already been registered in the system, based on existing stock levels. The available options are:



### The Reply/Authorization Process

You can reply to a request for supplies in one of two ways:

1. By using the Request Number to make the authorization
2. By using a list of requests, you can select a specific request for authorization.

The screenshot shows the following form fields:

- REQUEST**
- Request No..... 000001
- Request status..... Requested
- Date of this request..... 31/07/2000
- Organization..... CARITAS
- Destination..... DILI MUNICIPAL HOSPITAL
- Remarks..... URGENTLY NEEDED FOR PEDIATRIC WARD

Buttons: Continue, Exit

Press **Continue** to respond to the request, as shown in the following screen:

The menu at the center of the screen is used to manage responses to requests. The other fields provide information about the request. For example, if the request is for family rations, kitchen utensils, and personal hygiene kits, the system will respond to each request individually. The menu options are as follows:

- <Previous>** Returns to the previous item on the request list (unless you are at the beginning of the list).
- <Next>** Advances to the next item on the request list (unless you are at the end of the list).
- <Respond>** Will begin the verification process of existing supply stock in order to respond to the request.

Once you select **Respond**, the system will ask you if you will match the request with exactly what was requested, or if you will use alternative items from the subcategory:

Once you have selected an option, a list will appear in the lower half of the main screen with all existing items and their available quantities. You should enter the quantity **to be assigned** in the space labeled **“TO BE DELIVERED:**

Type the quantities to deliver to this destination Press <ESC> to Exit				
Item	Description	Q.Remaining	TO BE DELIVERED	Presentation unit
Albendazole	Albendazole	5,000	0	Chewable Tablet Oral 200

Next, you will be prompted to select whether this will be a **partial delivery** or a **total delivery**.

Authorizing Request No.....000001

Pharmaceutical	1 tin of 1,000 tabs.	<input type="radio"/> Refused .....
Antiparasitics/Malaria		<input type="radio"/> Partially delivered
Albendazole		<input checked="" type="radio"/> Completely delivered
		<input type="radio"/> Not available.....

Previous      Next      Respond      Save      Cancel

To access a specific request, move the cursor onto the desired request and press <ENTER>. Follow the procedure described above for printing the delivery form.

**Delivering an Authorized Request**

This option allows you to access a list of authorized but undelivered requests. To print an authorization, use the following procedure:

1. From the list of authorized requests, select the request you would like to print.
2. Follow the procedure described below.

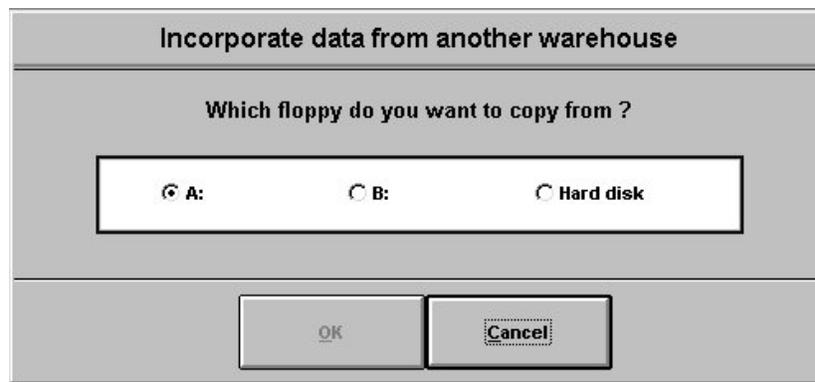


## Incorporating Data from another Warehouse

This option allows you to incorporate data sent from another Warehouse. Keep in mind that this data will be read-only, for the purpose of writing reports, and cannot be modified.

Before incorporating data from another source, note that the files will be read from the A: or B: drives, or from the hard disk in **C:\SUMASTO\IN\_OUT**. This directory was created automatically by the program during installation.

When using the **Incorporate** option, the system will display this screen:



You must choose the desired directory/drive.

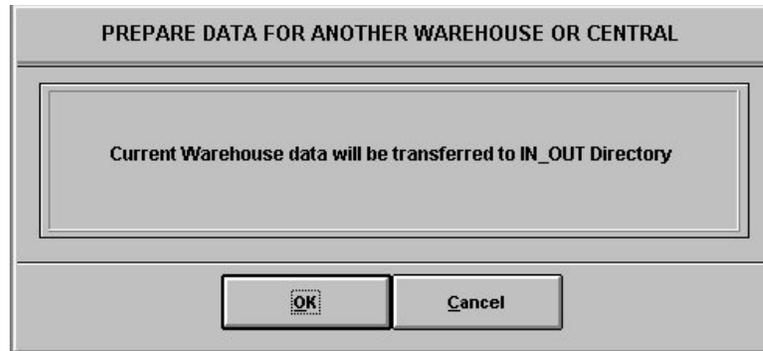
The screen should display the identification code of the warehouse to be incorporated (assigned by the system), the name of the warehouse and the date of registration for these data. Be sure to confirm this before continuing.

By answering **Yes** on the next screen, the data will be incorporated. Any existing data from the same warehouse will be replaced by the new incoming data.

## Preparing Data for another Warehouse or SUMA Central

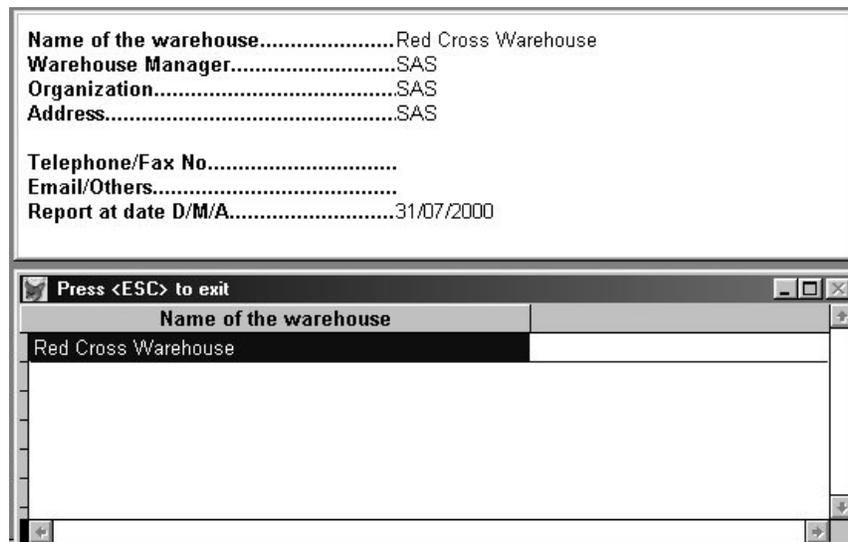
This option is used to prepare reports about existing stock in your warehouse to be sent to SUMA CENTRAL or to another warehouse. The process is automatic and the files will remain saved in the directory **C:\SUMASTO\IN\_OUT, A: or B:**.

When using this option, the following screen will appear:



## View Incorporated Data from another Warehouse

This option allows you to view data from the list of warehouses that have been incorporated into your warehouse database. This will enable you to examine existing stock in a variety of places. You will see the following screen:

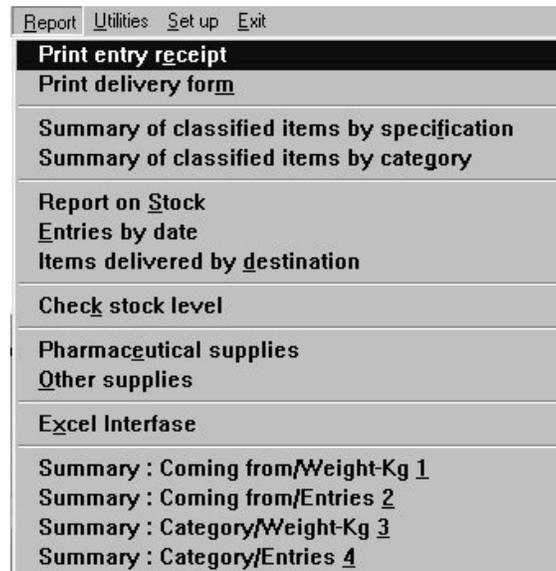


In this example there is only one warehouse with incorporated data. When there is more than one, you can examine details on each one by placing the cursor on and selecting it.

To exit and return to the main menu, press **<Esc>**.

## 7. Reports

The **Report** subheadings from the Main Menu allow you to prepare and print reports about existing data.



Before creating and printing a report, check that your printer is in working order and that it is connected to the computer. Make sure it is loaded with paper, and that the printer on-line. Remember that Warehouse Module reports should be printed using printers with 80 or 132 columns. (See your printer documentation for Specifications).

SUMA uses a standard presentation mode for all reports whether they are being printed or viewed on-screen:

Page Preview

---

**HUMANITARIAN SUPPLY MANAGEMENT SYSTEM**

ORGANIZATION : SAS

NAME OF THE WAREHOUSE : SAS

ENTRY FORM: 000001

---

**Entry information**

Date of this entry DMY 29/07/2000  
 Date of entry DMY 29/07/2000  
 Time of entry 17:34:46  
 Entries type Donation  
 Coming from DARWIN  
 Sent by CARITAS  
 Driver Name OJSA  
 LD. 3243235  
 License plate number CL3535  
 Receiver's name SAS

**Remarks**

---

**Summary of goods**

Pharmaceutical Yes  
 Water and Sanitation No  
 Health (Non-Pharmaceutical) No  
 Food and Drink No  
 Shelter/Housing/Electrical/Construction No  
 Logistics/Management No  
 Personal Needs/Education No  
 Unclassified Items No  
 Agriculture and Livestock Industry No

Category	Item	Quantity	Presentation unit	Temporary
Pharmaceutical	Amphotericin B	556	Vial Injection 50 mg in v	Medicine Sect

RECEIVER'S SIGNATURE :

**OUTPUT TO:**

Send to printer

See on screen

REF: CONPRI2/CONPRI2

## Reports on Stock

These reports summarize the existing stock level for a specific item or group of items in a specific warehouse.

To a stock report, you should:

1. Select the desired warehouse.

**Select warehouse to print out**

**WAREHOUSES LIST**

▼

2. Select the filter parameters for your search.

3. If the supply has been registered, the following screen will display a valid search result.

Subcategory	Item	Remaining	Form
Antibiotics/Antifungal	Amphotericin B	556	Vial
Antiparasitics/Malaria	Albendazole	4000	Chewable Tablet
Diagnostic Agents	Fluorescein	56	Eye Drops

### Entries by Date and Items Delivered by Destination

These options make it possible for you to list all the entries registered in the warehouse, based on the selection of several parameters, such as range of dates, category, subcategory and item. The same procedure is used for both options.

**ENTRIES BY DATE**

From date (DD/MM/YY)..... / /

To date (DD/MM/YY)..... / /

Sent by..... All

Category..... Pharmaceutical..... Yes

Subcategory..... All

Item..... All

Purchase  
 Donation  
 Reenter  
 All

OK Cancel



Remember that if you leave the date field blank and press <ENTER> in the spaces, information for **all** registered dates will be listed.

Select the presentation mode (to the printer, to a text file, or to view on the screen).

## Verifying Stock

Warehouse management requires that you define the minimum levels, maximum levels, and reorder points (when you must reorder an item because the inventory is low) of your stock. This ensures that important supplies will be available at any given moment. Using this reporting option, you can confirm the inventory for each item based on the definition of the levels you have assigned.

To prepare this report:

- A) Define the minimum and maximum values based on the parameters and the criteria for the specific supply items.
- B) Review the list you have just created, paying special attention to the columns referring to the criteria for minimum and maximum levels and reorder points.

## Excel Interfase

SUMA's Version 5.1 for Windows enables the information to be generated in Excel type files, which increases flexibility in the handling of the information, since the user can manipulate these data in Excel in order to produce new reports or graphs.

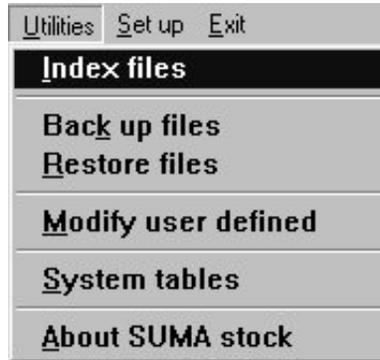
**EXCEL INTERFASE**

Data to translate	File Name
<input checked="" type="checkbox"/> Entries .....	FSSEXCEA
<input type="checkbox"/> Entries - Pharmaceutical .....	FSSEXCEB
<input type="checkbox"/> Entries - Other supplies .....	FSSEXCEC
<input type="checkbox"/> Entries - Unclassified .....	FSSEXCED
<input type="checkbox"/> Entries - Human resources (Does	FSSEXCEE
<input type="checkbox"/> Delivery .....	FSSEXCEF
<input type="checkbox"/> Delivery - Pharmaceutical .....	FSSEXCEG
<input type="checkbox"/> Delivery - Other supplies .....	FSSEXCEH
<input type="checkbox"/> Delivery - Unclassified .....	FSSEXCEI

In the previous dialogue box, you can select which files you want to generate by “marking” the small checkbox at left. Please note that the names of the files are predetermined. The files generated will remain in the folder where SUMA CENTRAL is installed on your hard disk, for instance **C: \SUMAWS51**.

## 8. The Utilities Menu

The **Utilities** heading on the main menu will display the following submenu:



### Index files

The index files option allows you to maintain the database index files. You should access it if you experience operational problems.

### Protection of information

In the introduction of this manual, we stressed the importance of protecting program data. To help you protect data, there are two options for backing up and restoring data that have been installed in the Warehouse Module. These options are **Back-up files**, and **Restore files**. They can help you reconstruct a great deal of information that would otherwise be due to a virus, errors on the hard drive, or other problems.



You should be very cautious when using these tools!

To use the Back-up Files option, you should:

1. Select the data storage capacity that the disk unit requires for the back-up. Generally the capacity is 360 KB or 1.2 MB for 5 ¼" diskettes or 720 KB or 1.44 MB for 3 ½" diskettes.
2. Select the A: or B: disk drive.
3. Once you confirm the selected drive, and that your disk is blank, formatted, and placed in the correct drive, place the cursor on the option **YES** and press <ENTER>.

4. Wait for the process to begin. If successful, the program will display a message and return to the main menu. If it does not work, it will display an error message.



- Depending on the amount of stored information and the capacity of the selected unit, the process might require more than one diskette. Be prepared with additional blank and formatted diskettes.
- Label the diskettes clearly as back up diskettes, with the date, time of initiation, and field unit number.

To recover data with the **Restore Files** command, you should:

1. Insert the diskette in the disk drive.
2. Select disk drive (A: or B:) and press <ENTER>.

Wait for the transfer to be carried out. If it is successful, a message will appear and you will return to the main menu.

## About SUMA

The option **About SUMA** gives background information on the development of SUMA, such as the current version, development team, etc.

