USAID | DELIVER PROJECT

PIPELINE 4 USER'S GUIDE

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Abstract
The pipeline monitoring and procurement planning system (PipeLine) is a software tool that helps program managers—

- gather critical forecasting information
- ensure that products arrive on time
- maintain consistent stock levels at the program or national level
- prevent stockouts.

This guide provides basic information on how to use PipeLine.

Cover Photo: Pharmaceutical Advisor Cecil Jacques and Operations Manager Zobaida Sakoor, both staff of the Supply Chain Management System, participate in a PipeLine workshop in Georgetown, Guyana, on July 12, 2007.

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CONVENTIONS

Introduction

This table lists conventions used in this manual. The list is provided to help make the manual easier to understand.

CONVENTION	MEANING
< >	Identifies keyboard keys (i.e., <Enter>, <Esc>, <F10>, <Alt>, <Ctrl>, <Back Space>, etc.).
	Note Identifies points of importance.
	Helpful Hint Identifies points that can speed up or ease an operation.
! !	Important Indicates points you must consider before taking any action.
WARNING!!	Warning Indicates actions that will permanently change the data, or adversely effect the system.
Italic Print	Words that need special attention.

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1 OVERVIEW

Introduction

The Pipeline Monitoring and Procurement Planning System (PipeLine), a software tool, was designed to help program managers monitor the status of their product pipelines and product procurement plans. PipeLine provides information needed to initiate and follow-up actions to ensure the regular and consistent stock of products at the program or national level. Consistency of stock is the first step in meeting the basic objective of any logistics system, which is to provide—

- the *right* quantities
- of the *right* commodities
- in the *right* condition
- in the *right* place
- at the *right* time
- for the *right* cost.

These are the *six rights* of logistics management.

What PipeLine Can Do for You

PipeLine helps you achieve the *right* quantities at the *right* time.

For each product, PipeLine monitors—

1. Total quantities *consumed* (i.e., amounts dispensed to users or sold to clients)

2. *Shipments* of new products (planned, ordered, shipped, or received) into your program and the values of your products

3. *Inventory levels* for each product in your program's logistics system (desired and actual)

4. *Inventory level changes* (e.g., product losses or transfers out of or into your program)

With these data and an understanding of the *lead time* required for each step in the procurement process, PipeLine can—

1. Show what actions you need to take for procurement planning and management, and when these actions should be taken.

2. Identify impending problems (i.e., surpluses, shortfalls, or stockouts) *before* they occur.

3. Calculate procurement quantities needed to keep your pipeline in balance.

4. Calculate the estimated value of shipments or maintain the actual value (if known).

You can use this information with program policymakers, product suppliers, and donors to provide a rational basis for planning future product needs.

PipeLine is *not* the answer to every logistics question. It helps monitor the *aggregate* quantity of each product entering and leaving your program's distribution system (preferably using data from a logistics management information system [LMIS]).

PipeLine's utility is enhanced if your program has a well-functioning LMIS and forecasting procedures. Even without these underlying systems, use PipeLine with whatever data are available. By beginning a rational and systematic product monitoring and planning process, you take the first step toward ensuring consistent stock levels.

Why Use PipeLine?

Ensuring adequate supplies of commodities is difficult for most programs. As a program manager, you face a complex procurement planning environment, characterized by—

1. Multiple suppliers of many products (local and private suppliers, bilateral and multi-lateral donors, etc.), each with its own products, lead times, costs, information needs, and bureaucratic constraints

2. Proliferation of service delivery points, in many cases in an integrated service delivery setting, and/or with multiple service delivery organizations served by a single logistics system

3. Increasing volume (and costs) of commodities, which must be managed and moved through complex distribution channels

4. Increasing emphasis on accountability, cost-effectiveness, and sustainability from donors who fund product procurement and from policymakers.

You need to monitor the quantity and timing of multiple products entering your logistics system from multiple suppliers. Because procurement lead times may be long—years, in many cases—you need to take action months or years before commodities are needed to receive them on time.

You may need to negotiate with many different suppliers and donors to obtain the quantities you require. Such negotiations are best accomplished when specific data on product requirements are available. You must know when you will stock out of each product, how much must be procured to meet future needs, and when you should receive it. To prevent overordering, you must also know what quantities would exceed your storage capacity or risk wastage due to expiry.

PipeLine can provide this information.

Who Should Use PipeLine?

In a multi-product, multi-supplier environment, procurement planning and pipeline monitoring functions cannot be donor driven. It is increasingly necessary that local program managers be empowered to do their own forecasting, pipeline monitoring, and procurement planning; they must also take charge of coordinating the activities of donors and local suppliers, as well as those of their own logistics management staff. Donor staff often have other priorities and little time to devote to the details of logistics management. Commercial suppliers have interests that may or may not correspond to the interests of your organization.

If you are the logistics manager or program manager for your organization, you should manage your own pipeline. PipeLine can help.

While your managers and decision makers will be the primary users of PipeLine, the system can provide information to—

Suppliers of commodities
PipeLine provides reports on the current status and the cost of pending shipments from a specific supplier, which that supplier can use to monitor product flow.

Purchasers/donors of commodities
Staff who finance the purchase of commodities can use PipeLine reports and graphs to understand the current pipeline status and future requirements.

Host-country policymakers
PipeLine reports and graphs can be used to help policymakers understand issues with the levels of particular commodities and the implications of different decisions on the availability of the product.

PipeLine Software Functions

PipeLine can help you with pipeline monitoring and procurement planning functions, as explained below.

Pipeline Monitoring

Pipeline monitoring functions include—

- Monitoring stock balances, in terms of quantities and months of stock on hand in the entire program (aggregate of stock at all levels)
- Comparing stock balances to maximum and minimum stock policies
- Automating the identification of pipeline problems (quantities needed, stockouts, balances below minimum or above maximum)
- Providing couple-years of protection (CYP) conversion graphs.

Procurement Planning

Procurement planning functions include—

- Calculation of shortfalls/surpluses and quantities needed to maintain the program's desired stock levels
- Automated calculation and tracking of pending pipeline actions, based on lead times (shipments to plan, order, ship, and receive)
- Application of USAID's contraceptive procurement tables (CPT) format for the computation of calendar year quantities required and the generation of data for USAID's planning requirements
- Calculation of estimated costs of shipments and freight
- Comparison of alternative procurement scenarios and analysis
- Alternative unit of measure calculation displays products in Basic Units. Basic Units are used to quantify patient or consumer needs and usually refers to tablets, capsules, or milliliters, rather than packs or bottles.

How to Obtain PipeLine

PipeLine was first developed by the Family Planning Logistics Management project. It is now maintained by the USAID | DELIVER PROJECT, Task Order 1, and is funded by the U.S. Agency for International Development under contract no. GPO-I-00-06-00007-00, beginning September 29, 2006. Task Order 1 is implemented by John Snow, Inc., in collaboration with the Program for Appropriate Technology in Health, Crown Agents Consultancy, Inc., Abt Associates, Fuel Logistics Group (Pty) Ltd., UPS Supply Chain Solutions, Family Health International, Manoff Group, Inc., and 3i Infotech. The project improves essential health commodity supply chains by strengthening logistics management information systems, streamlining distribution systems, identifying financial resources for procurement and supply chain operation, and enhancing forecasting and procurement planning. The project encourages policymakers and donors to support logistics as a critical factor in the overall success of their health care mandates.

The PipeLine software, its documentation, and assistance in installation and use are available from the following sources:

PipeLine Product Manager
USAID | DELIVER PROJECT
John Snow, Inc.
1616 Fort Myer Drive, 11th Floor
Arlington, VA 22209 USA

Phone: 703-528-7474
Fax: 703-528-7480

2 GETTING STARTED

Introduction

PipeLine now allows you to monitor and procure more than contraceptives. You can use it to monitor and procure commodities for a variety of public health purposes. This can be done with PipeLine's new classification feature.

This section explains how to install PipeLine and presents some of its new features. For questions about *running* PipeLine, contact the PipeLine Product Manager at this address:

USAID | DELIVER PROJECT
John Snow, Inc.
1616 Fort Myer Drive, 11th Floor
Arlington, VA 22209 USA

Phone: 703-528-7474
Fax: 703-528-7480

System Requirements

The following resources are recommended for use with PipeLine—

CPU	Pentium III or higher
Operating System	Windows 2000/XP
Memory	256 MB
Hard Drive Space	500 MB
Video Adapter	SVGA with 800x600 resolution
Miscellaneous	Microsoft Office 2003 Service Pack 2

	Although PipeLine will run without Microsoft Office® 2003 installed on your computer, having Office 2003 installed will enhance PipeLine's usefulness by allowing PipeLine to export data files to Word® or Excel®.

How to Install PipeLine

PipeLine can be installed from a CD-ROM or the Internet.

Before You Begin

You can run PipeLine 2 and PipeLine 4. on the same computer, but we recommend that you uninstall PipeLine 2 BEFORE installing PipeLine 4.

	All other previous versions of PipeLine cannot be run on the same computer as PipeLine 4. When you install PipeLine 4, the installer will automatically remove the previous version of PipeLine prior to installing PipeLine 4.

To uninstall PipeLine 2—

1. Click on Start.
2. Click on the Settings option.
3. Click on the Control Panel option.

After the Control Panel window opens—

4. Click on the Add/Remove Programs option.

Locate and click on PipeLine in the Currently Installed Programs list.

5. Click on the Change/Remove button.

The PipeLine 2 setup program will start, and will prepare your computer to uninstall PipeLine 2.

6. Click on the Remove All Button.

A message is displayed asking if you want to remove PipeLine.

7. Click on the Yes button to begin the uninstall procedure.

	Data files created with previous versions of PipeLine are not removed from your system. See Converting Your Existing Data Files on page 2-5 for information on converting your existing PipeLine 2 data files.

When the uninstall procedure is completed, you will be prompted to restart windows.

8. Click on the Restart Windows button.

Installing PipeLine from a CD

1. Start Microsoft Windows.
2. Insert the PipeLine CD.

The PipeLine installation should begin automatically.

3. Follow the on-screen instructions.
4. If the installation does not begin automatically—
   a. Click on Start on the Windows Taskbar.
   b. Click on Run from the pop-up menu.
   c. In the Command Line box, type *x:setup* ("x" is the letter of your CD-ROM drive).
   d. Click on the OK button, and follow the on-screen instructions.

After PipeLine is successfully installed, the PipeLine shortcut (shown at right) will be displayed on your desktop.

Installing PipeLine from the Internet

PipeLine is available on the USAID | DELIVER PROJECT website at the following web address:

http://deliver.jsi.com.

	If your Internet connection is slow and/or unreliable, order the PipeLine CD-ROM.

To download PipeLine—

1. Access the Internet, and enter the USAID | DELIVER PROJECT web address.
2. Locate the PipeLine download page, and follow the on-screen instructions to download PipeLine.

	The Internet copy of PipeLine requires a password to begin the install process. The password will be sent by email. You must have a valid email address to receive the password.

How to Start PipeLine

PipeLine can be started from the Windows desktop or the Windows taskbar.

Starting PipeLine from the Windows desktop

From the Windows desktop—

1. Locate and double-click on the PipeLine icon to start the application.

Starting PipeLine from the Windows taskbar

From the Windows taskbar—

1. Click on Start.
2. Click on Programs.
3. Locate and click on the PipeLine 4.0 link.

Reinstalling PipeLine

To reinstall PipeLine—

1. Place the PipeLine CD in your CD-ROM drive.

If you do not have the PipeLine CD, you can use the copy of PipeLine you downloaded from the USAID | DELIVER PROJECT website.

	The Internet version of PipeLine requires a password to start the install process. That password was sent to you by email when you downloaded PipeLine. If you no longer have the email containing the PipeLine password, redownload PipeLine from the USAID | DELIVER PROJECT website: (http://deliver.jsi.com).

2. Start the install process, and follow the instructions on your screen.

During the process, a message box is displayed instructing you to remove PipeLine from your computer.

1. Click on the Remove button to remove PipeLine from your computer.
2. Click on the Finish button when prompted.

After PipeLine has been removed—

3. Repeat the PipeLine installation procedure.

See page 2-3 for information on installing PipeLine.

Converting Your Existing Data Files

This version of PipeLine allows you to convert data created with previous versions of PipeLine.

From the Program Data screen—

1. Click on the File Menu Bar option, and select the Open option from the pull-down menu.

PipeLine opens a window so you can locate the data you need to convert.

2. Locate and select the data file you need, and click on the Open button.

	PipeLine files have the data file extension **.mdb**

After you select the data file you need to convert, PipeLine displays a message similar to the one in the text box below.

WARNING!!	The current program's data file is not the current version. You can allow PipeLine to upgrade the file now. If you do not, some of PipeLine's features may not work properly.

3. Click on the Yes button to convert the selected data.

PipeLine opens a window, and allows you to rename the file you selected to upgrade. This safeguards the original data by saving the upgraded data under a different name.

4. Type the new name in the File Name field, and click on the Open button.

PipeLine converts the selected data, renames the file, and displays its associated program data on the Program Data screen. You can now work with the converted data file.

	Remember, your original data remains in its original directory with its original name. The converted data is a copy of the original.

On-Line Help

PipeLine's On-Line Help is a supplement to the *PipeLine 4 User's Guide*. On-Line Help provides information about basic PipeLine functions.

1. Press the <F1> key to access On-Line Help.

Navigation Features

PipeLine has navigation features that help you move easily and quickly from one part of the system to another. These features are the Tree View and the Menu Bar's Window utility.

Tree View

This feature offers a quick way to navigate through the system. The Tree View is fully expanded when you start PipeLine, and it remains open on the left side of the screen. Figure 2-1 shows an example of the Tree View.

	The Tree View cannot be closed.

To use the Tree View—

1. Click on the option you need, to display its associated screen.

To collapse a group of Tree View options—

2. Click on the "**-**" next to a Tree View option to collapse the option and hide its sub-options.

To expand a group of Tree View options—

3. Click on the "**+**" next to a Tree View option to expand and show its sub-options.

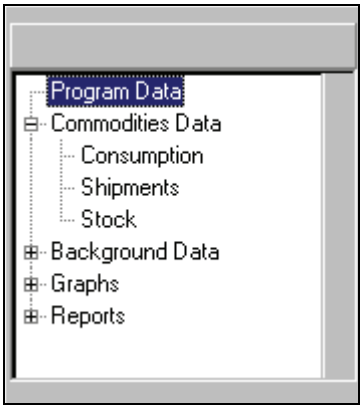


Figure 2-1—The Tree View

Menu Bar

PipeLine's Menu Bar provides access to utilities and features that enhance the system's functionality. See appendix A, PipeLine Utilities, for information on these features and utilities.

PipeLine's Window Utility

The PipeLine Window utility enables you to quickly view a list of programs that are currently open. It also allows you to switch between open programs. Figure 2-2 shows an example of the Window drop-down menu.

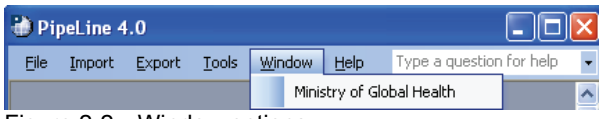


Figure 2-2—Window options

To switch between open programs—

1. Click on the Window option of the Menu Bar.
2. Click on the name of any program file listed in the drop-down menu.

PipeLine displays the Program Data screen, which shows the data associated with the selected program.

Buttons

The following buttons are most commonly used in PipeLine:

BUTTON	ACTION
Add	Adds a new record to the database.
Copy	Copies a record.
Delete	Deletes a selected record from the database.
Print	Prints a PipeLine report or graph.
Save	Saves a new or updated record.
Preview	Displays a preview of the data of a graph or report before printing.
Show Data	Displays data associated with a particular report on-screen.
Hide Data	Hides the data of a particular report.
PDF	Saves the graph or report as a PDF file.

Scroll Bars

Vertical and horizontal scroll bars are displayed on some PipeLine screens if there is more data than your screen can display at one time.

1. Click on one of the arrow buttons to move in the indicated direction:

Figure 2-3 displays an example of vertical and horizontal scroll bars.

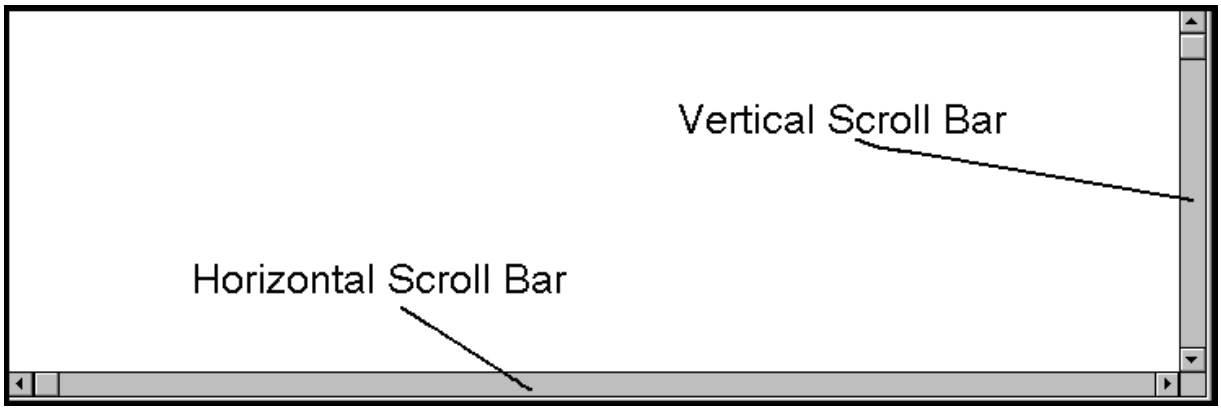


Figure 2-3—Vertical and horizontal scroll bars

To quickly scroll through a screen, click on the square button on the horizontal or vertical scroll bar, and hold down the left mouse button, while moving your mouse left and right or up and down.

Pull-Down Menus

Pull-down menus let you choose from a list. To use a pull-down menu—

1. Click on the arrow next to the menu to display its list.

2. Click on the item you want to select.

The selected item is displayed in the associated field. Figure 2-4 shows that "DFID" was selected from the Supplier pull-down menu.

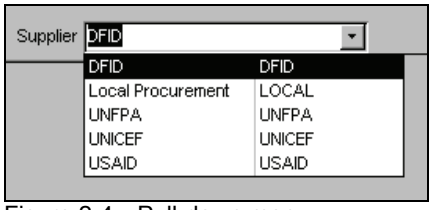


Figure 2-4—Pull-down menu

You can also select an item from a pull-down menu by clicking on the menu and typing the first letter of the item you need.

Keys for Editing Records

The following table lists keys you can use when editing records in PipeLine.

KEYS FOR EDITING PIPELINE RECORDS	
F1	Displays On-Line Help.
Backspace	Deletes selection or character to the left of the cursor.
Delete	Deletes selection or character to the right of the cursor.
Esc	*First press*: Undoes changes to a field. *Second press*: Undoes all changes to the record.
Insert	Toggles between insert and overwrite modes.
Tab	Moves the cursor from one field to the next, and moves the cursor from one button to another without activating buttons.

3 PROGRAM DATA

Accessing the Program Data Screen

After you install PipeLine and click on the PipeLine icon, the Program Data screen is displayed.

PipeLine has a sample program database called “Ministry of Global Health,” which shows how PipeLine displays and organizes data. The sample database is displayed on PipeLine’s initial startup (see Figure 3-1).

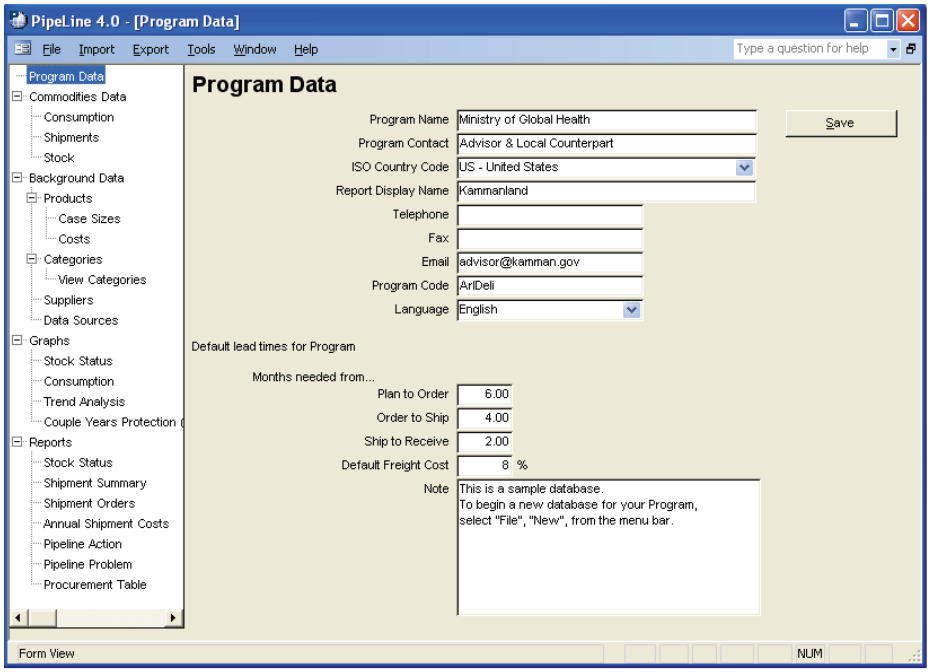


Figure 3-1—Program Data screen

Adding a Program

The File option of the PipeLine Menu Bar enables you to add a program to PipeLine. To add a new program—

1. Click on the File Menu Bar option.

2. Click on the New option of the File drop-down-menu.

PipeLine displays a blank Program Data screen similar to Figure 3-2.

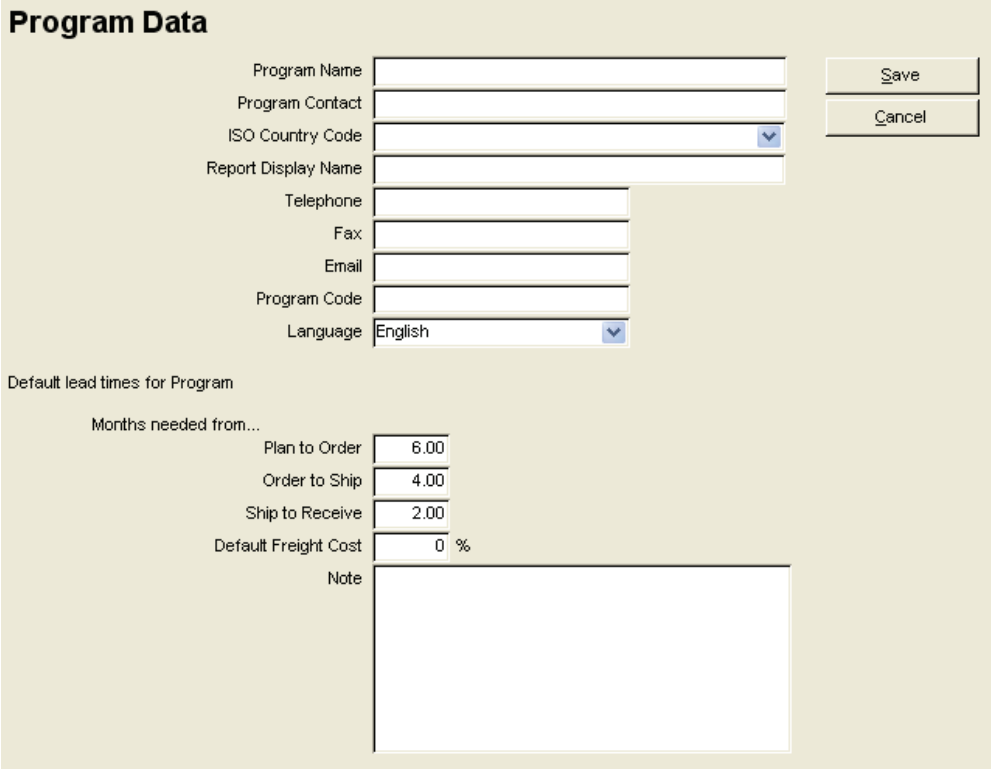


Figure 3-2—Blank Program Data screen

	The Program Name, ISO Country Code, Report Display Name, and Program Code fields are required. The remaining fields are optional or may retain their default values.

3. Click in the Program Name field, and type the new program's name.
4. Click in the Program Contact field, and type the name of the program's contact person.
5. Click on the pull-down menu arrow in the ISO Country Code field. Scroll down to find the country, click on the country to select. The Report Display Name will be automatically filled in.
6. Click in the Telephone field, and type the contact person's telephone number.
7. Click in the Fax field, and type the contact person's fax number.
8. Click in the Email field, and type the contact person's email address.

The Program Code field holds the program's identification code. This ten-character code must be unique.

9. Click in the Program Code field, and type the program's code.

PipeLine supports English, Spanish, French, Arabic, and Portuguese. The Language field enables you to set the default language for the program you are creating.

PipeLine's default language is English; all PipeLine's screens and messages are initially displayed in English. To change the default language of the new program—

10. Click on the arrow next to the language field and select the program's default language from the pull-down menu.

	The selected language is used when the associated program is active. To temporarily change the language of an active program, select Language from the Tools option on the Menu Bar. However, after you exit and restart PipeLine, the system will revert to the program's selected default language.

Default Lead Times

Program default lead times are used to calculate procurement actions for needed quantities. They are also used for shipments from suppliers without lead times entered and without shipment lead time dates entered.

The Plan to Order field shows the estimated lead time (in months) expected from the time a shipment is planned to when it is ordered. The default is 6.00 (six-month lead time). To change the default—

11. Click in the Plan to Order field, delete the default value, and type the lead time.

The Order to Ship field shows the estimated lead time (in months) expected from the time a shipment is ordered to when it is shipped. The default is 4.00 (four-month lead time). To change the default—

12. Click in the Order to Ship field, delete the default value, and type the order to ship lead time.

The Ship to Receive field shows the estimated lead time (in months) from the time a shipment is shipped to when it is received by the program. The default is 2.00 (two-month lead time). To change the default—

13. Click in the Ship to Receive field, delete the default value, and type the ship to receive lead time.

Default Freight Cost

The Default Freight Cost field shows the approximate freight cost for a shipment as a percentage of the shipment's product value. Include all costs associated with product

delivery (i.e., taxes, clearance fees, etc.). PipeLine uses the default freight cost when calculating freight cost if you do not fill in freight cost estimates for individual suppliers.

14. Click in the Default Freight Cost field, and type the default freight cost as a percentage of the shipment's product value.

The Note field is a memo field for additional information about the program, which you may want to store for future reference.

15. Click in the Note field, and type any relevant notes.

Saving the Data

After you complete the Program Data form—

1. Click on the Save button.

PipeLine displays the Save Database File window so you can save the current program. PipeLine creates the program's default file name based on the program code.

2. Click on the Save button to accept the default file name.

   Or, type a new file name and click on the Save button.

WARNING!!	Never save the data to your A:\ drive.

The Program Data form is redisplayed after the data is saved.

Selecting a Program

PipeLine allows you to deselect the current program and activate another. When the Program Data form is displayed, it displays information about the current (active) program. You can activate another program if additional programs exist, as explained below.

	The active program is the current program. The program's name is displayed on PipeLine screens, reports, and graphs. Only one program can be active at a time.

Opening and Activating a Program

The Open option in the drop-down menu of the File Menu Bar option enables you to select and open a program, which will make the selected program the current or active program. To open and activate a program—

1. Click on the File Menu Bar option.
2. Click on the Open option on the drop-down menu.

PipeLine displays a window showing the programs available for activation.

WARNING!!	Never open a program from your A:\ drive. Move the data from the A:\ drive to your hard disk, then use the Open option to select the program.

3. Click on the program you need to open, then click on the Open button.

Program information associated with the selected file is displayed on the Program Data screen.

Switching between Programs

Although you can only have one program active at a time, PipeLine "remembers" the previous programs you worked with. The program names are kept in a pull-down menu, allowing you to switch between them.

To switch between programs—

1. Click on the Window option of the PipeLine Menu Bar.
2. Click on any of the programs listed in the drop-down menu.

Program information associated with the selected program is displayed on the Program Data screen. This program becomes the current or active program.

Editing Program Data

You can edit program data for a selected program at any time. If the program you need to edit is not the current program—

1. Select the program you need to edit using one the methods in Selecting a Program beginning on page 3-4.

After the program you need to edit is displayed on the Program Data screen—

2. Highlight each field you need to edit and enter the new data.

3. Click on the Save button when you finish.

The data is saved and redisplayed on your screen.

Copying a Program

The Copy option of the File option of the PipeLine Menu Bar allows you to make a copy of the current program. The copy can only be saved to your hard disk. Use this option to archive the data.

	This feature can also be used to backup your program data.

If the program you need to save is not the current program—

1. Select the program you need to copy using one of the methods in Selecting a Program beginning on page 3-4.

With the current program you need to save displayed on the Program Data screen—

2. Click on the File option of the PipeLine Menu bar.
3. Click on the Copy option in the File drop-down menu.

PipeLine displays a window so that you can select where the copy will be stored.

	Never save the data to your A:\ drive.

4. Select the location where you want to store the copy.
5. Click on the Open button to save the data to the selected location.

The data is saved.

Closing a Program

Use the Close option of the File Menu Bar option to close any open program.

Closing a program removes it from the open program list. You can reopen any closed program by following the instructions in Opening and Activating a Program on page 3-5.

To close a program—

1. Select the program you want to close.

2. Click on the File option of the PipeLine Menu Bar.
3. Click on the Close option of the File drop-down menu.

PipeLine displays a message window so you can confirm that you want the selected program closed.

4. Click on the Yes button to close the selected program.

4 BACKGROUND DATA

Introduction

The Background Data Tree View options enable you to modify pull-down menus, program and supplier lead times, and product costs; and to establish product minimum/maximum stock levels. PipeLine has default records you can modify. If the PipeLine defaults are not right for your program, delete the defaults and add new records.

Products, Categories, and Types

A *product* is a commodity whose supply status you monitor. Previous versions of PipeLine let you classify products by method. Now you can include groups within groups by assigning each product to a category and assigning these categories to other categories.

Each product is assigned to a *Type*, which is a category with products assigned to it. A product can only be assigned to one Type. After you define categories and assign products to Types, you can limit the products included in reports and pull-down menus.

Products

The Products Tree View option enables you to modify product data; and change min/max stock levels, a default product supplier, or a product's category or type.

1. Click on the Products Tree View option.

PipeLine opens the Products screen (see Figure 4-1).

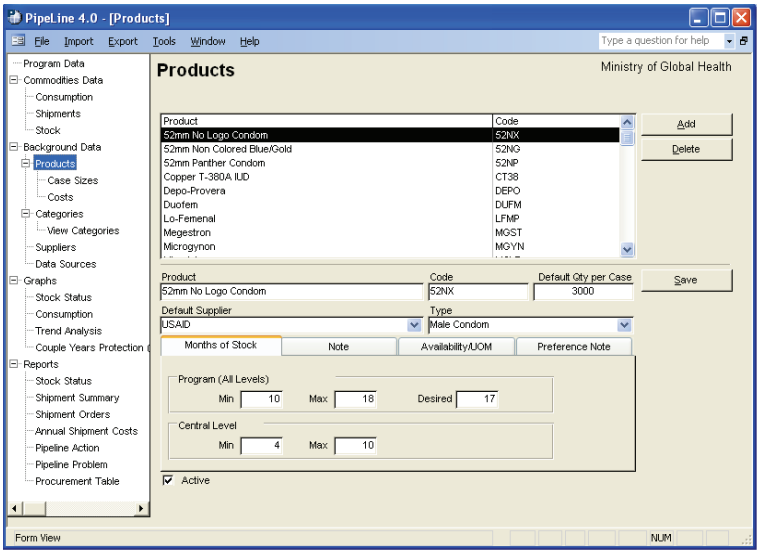


Figure 4-1—Products screen

Adding a Product

Use the Add button to add a product. To add/update products from a file generated by an external procurement system see the PipeLine Utilities-Import Product Data section.

With the Products screen displayed—

1. Click on the Add button to display a blank Products screen (see Figure 4-2).

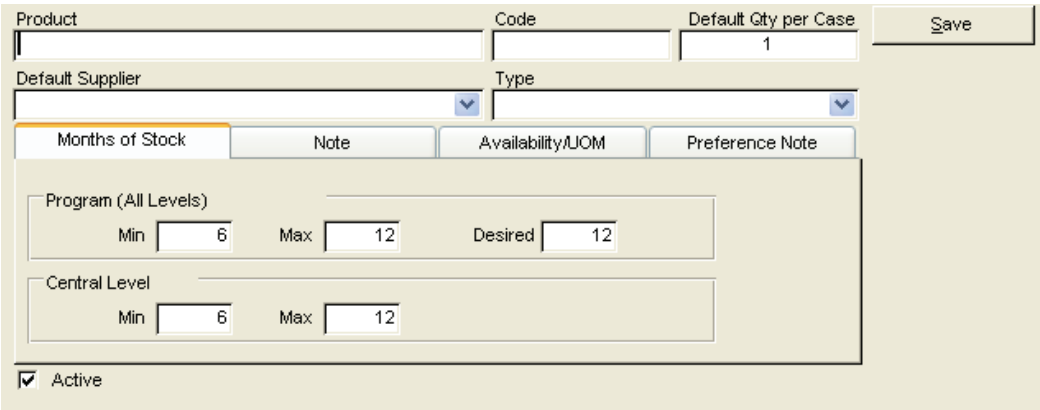


Figure 4-2—Products screen data entry area

2. Type the product name.

The Code field holds the product's code, which is used to help identify the product. Data in the Code field is created based on the name you give the product.

You may keep the PipeLine-generated code or use your own coding system.

To change the PipeLine-generated code—

3. Highlight the PipeLine-generated code, and type the new code.

	You are limited to 10 characters, which can be numbers, letters, spaces, or a combination of these.

The Default Qty per Case field shows the default product amount in a single case.

4. Click on the Default Qty per Case field, and type the default product amount of a single case.

The Default Supplier field shows the product's default supplier.

5. Click on the arrow next to the Default Supplier field, and select the product's default supplier from the pull-down menu.

	If the supplier you need is not listed, you must add it. See Adding a Supplier on page 4-15.

Type refers to the group to which a product belongs (for example, contraceptives, HIV/AIDS test kits, etc.). It can also refer to a category of similar products (for example, sexually transmitted infection [STI] treatment drugs).

6. Click on the arrow next to the Type field, and select the type (category) from the pull-down menu.

	If the type (category) you need is not listed, you must add it. See Adding a Category on page 4-11.

The Active field shows that the product is active. New products are active by default.

Months of Stock Tab

These fields enable you to set the product's minimum, maximum, and desired stock levels.

Program (all levels)

This area enables you to set stock levels for the entire program.

The Min field shows the minimum amount of stock (in months). The default is 6 (six months of stock). To change the default—

7. Click on the Min field, and type the product's minimum stock level.

The Max field shows the maximum amount of stock (in months). The default is 12 (twelve months of stock). To change the default—

8. Click on the Max field, and type the product's maximum stock level.

The Desired field shows the desired amount of stock (in months). The default is 12 (twelve months of stock). To change the default—

9. Click on the Desired field, and type the product's desired stock level.

Central Level

This area enables you to set the stock level for your central facility.

The Min field shows the minimum amount of stock (in months). The default is 6 (six months of stock). To change the default—

10. Click on the Min field, and type the product's minimum stock level.

The Max field shows the maximum amount of stock (in months). The default is 12 (twelve months of stock). To change the default—

11. Click on the Max field, and type the product's maximum stock level.

The Note Tab

The Note Tab opens a memo field that enables you to enter additional information about the product.

12. Click on the Note Tab, and enter any additional information about the product.

Availability/UOM Tab

These fields enable you to set the product's availability, pack size, and basic unit of measure.

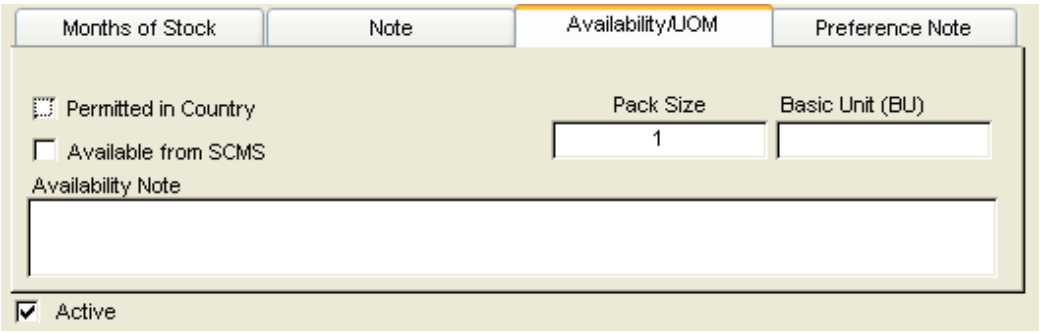


Figure 4-3—Products screen Availability/UOM tab

13. Click on the Availability/UOM tab.

The Permitted in Country field shows whether the product is permitted in the county. The default is False. To change the default—

14. Click on the Permitted in Country field.

	If Permitted in Country is unchecked, then the product is either not permitted in the country or its permission is unknown.

The Available from SCMS field shows whether the product is available for procurement from SCMS. The default is False. To change the default—

15. Click on the Available from SCMS field.

The Pack Size field shows the product's quantity of basic units per pack. The default is 1 (one unit per pack). To change the default—

16. Click on the Pack Size field, and type the product's quantity of basic units per pack.

The Basic Unit (BU) field shows the product's basic unit of measure.

17. Click on the Basic Unit (BU) field, and type the product's basic unit of measure.

The Availability Note is a memo field that holds information about the product's availability.

18. Click on the Availability Note field, and enter any information about the availability of the product.

Preference Note Tab

The Preference Note Tab opens a memo field that enables you to enter information about product preferences.

19. Click on the Preference Note Tab, and enter any information about product preference.

When you finish—

20. Click on the Save button to save the data, and return to the Products Selection form.

See Adding Case Size Data on page 4-6 for information about entering product case size data.

See Adding Cost Data on page 4-9 for information about entering product cost data.

Editing Product Data

Existing product data can be edited, as explained below.

	If the product was imported from the SCMS product list, only a few fields can be edited.

With the Products screen displayed—

1. Click on the product in the Product window that you want to edit.

Data associated with the selected product is displayed in the lower half of the Products screen.

2. Click on the field you want to edit, and enter the new data.
3. If the product is no longer active, click on the Active field.

	A product should be marked inactive if you no longer monitor or procure it (i.e., a discontinued product).

4. Click on the Note Tab, and enter the reason for the edit.
5. Click on the Save button to save the data.

Deleting a Product

Use the Delete button to delete a product.

With the Products screen displayed—

1. Select the product you want to delete.
2. Click on the Delete button.

If the product can be deleted, PipeLine will display a confirmation message.

3. Click on Yes to confirm the delete.

If you cannot delete the product (because it is associated with other records), PipeLine will display a message window.

4. Click on OK to close the message window.

Case Sizes

Case sizes are used to set a product's case size for a specific supplier. Shipment quantities are rounded up to the nearest case.

	Default Case Size, shown on the products screen, will be used if the case size is not entered for a specific supplier.

Adding Case Size Data

Use the Case Sizes option of the Tree View to access case size data.

! !	When adding Case Size records, you must first select the supplier and product from the pull-down menus.

1. Click on the Case Sizes Tree View option.

The Product Case Sizes screen is displayed (see Figure 4-4).

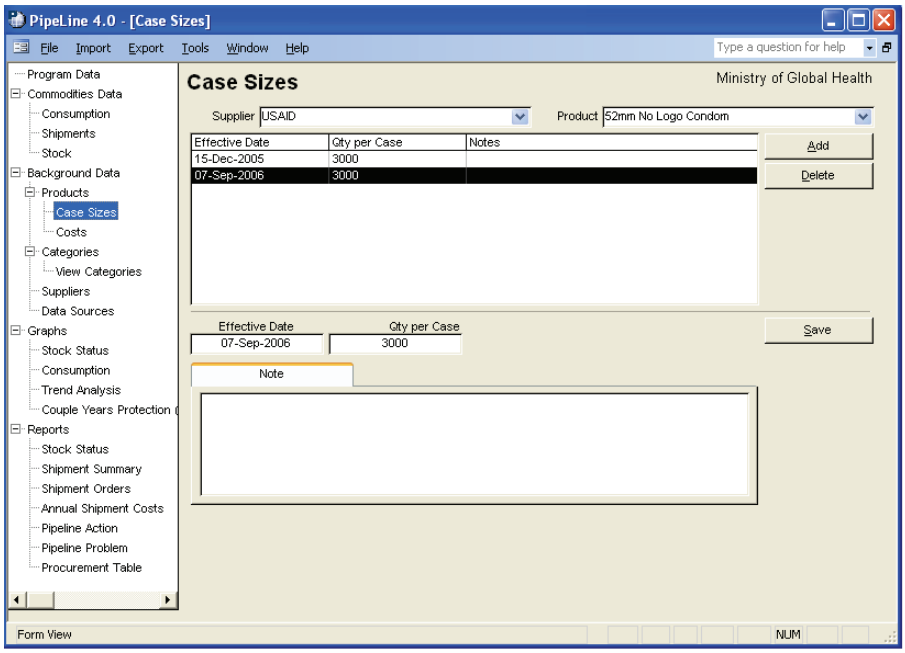


Figure 4-4—Case Sizes screen

2. Click on the arrow next to the Supplier field, and select the supplier from the pull-down menu.

3. Click on the arrow next to the Product field, and select the product from the pull-down menu.

4. Click on the Add button.

The Effective Date field displays the date the case size becomes active. For a new product, the default Effective Date is the system date. Shipment amounts are calculated based on the active case size on the shipment's order date. The last case size entered remains active until a new case size with a later effective date is entered.

5. Type the date the case size becomes effective.

The Qty per Case field shows the product amount in a single case from the selected supplier.

6. Type the product amount of a single case.

The Note field is a memo field that holds additional information about the case size.

7. Type any notes about the case size, if needed.
8. Click on the Save button when you finish adding case size data.

Editing Case Size Data

Use the Case Sizes Tree View option to access case size data.

1. Click on the Case Sizes Tree View option.
2. Click on the arrow next to the Supplier field, and select the supplier from the pull-down menu.
3. Click on the arrow next to the Product field, and select the product you want to edit from the pull-down menu.
4. Select the case size data you need to edit.
5. Click in the field you need to edit, and enter the new data.
6. Click on the Save button to save your changes.

Deleting Case Size Data

Use the Case Sizes Tree View option to access case size data.

1. Click on the arrow next to the Supplier field, and select the supplier from the pull-down menu.
2. Click on the arrow next to the Product field, and from the pull-down menu, select the product with the case size data you want to delete.
3. Click on the case size data you want to delete.
4. Click on the Delete button.

A confirmation message is displayed.

5. Click on Yes to delete the selected case size data.

Costs

Product costs are used to set a product's default cost.

Adding Cost Data

Use the Costs Tree View option to access the Costs screen.

1. Click on the Costs Tree View option.

! !	When you add product cost data, first select the supplier and product from the pull-down menus.

PipeLine displays cost records for the selected supplier/product, if such data exists (see Figure 4-5).

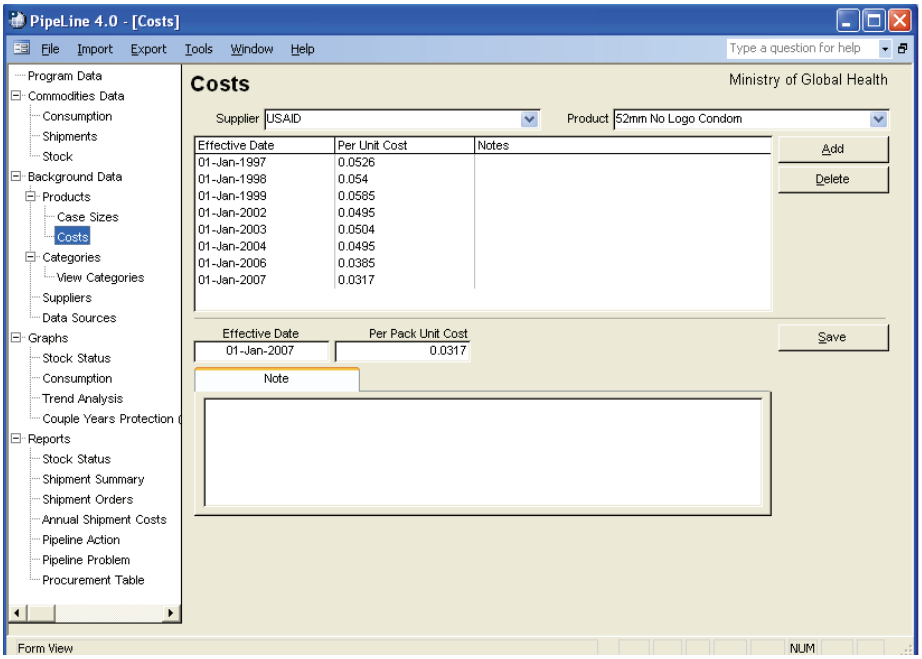


Figure 4-5—Costs screen

2. Click on the arrow next to the Supplier field, and select the supplier from the pull-down menu.
3. Click on the arrow next to the Product field, and select the product from the pull-down menu.
4. Click on the Add button.

The Effective Date field shows the date on which the cost becomes active. Shipment costs are calculated based on the active cost on the ship date. The amount entered remains active until a new amount, with a later effective date, is entered.

5. Type the date when the new cost becomes effective.

The Per Unit Cost field shows the product's unit cost. For the Cost reports to calculate complete costs, all products from each supplier must have cost data entered in this field and have an effective date prior to the shipment's ship date.

6. Click in the Per Unit Cost field, and type the product's per unit cost.

The Note field is a memo field for additional information about the product's cost.

7. Enter any relevant notes about the cost, if needed.

8. Click on the Save button.

Editing Cost Data

Cost data can be edited, as explained below.

1. Click on the Costs Tree View option.

2. Click on the arrow next to the Supplier field, and select the supplier from the pull-down menu.

3. Click on the arrow next to the Product field, and select a product from the pull-down menu.

Data associated with the selected product and supplier are displayed.

4. Select the cost data you want to edit.

5. Click in the field you need to edit, and enter the new data.

6. Enter any relevant notes in the Note field about the changes made.

7. Click on the Save button to save your changes.

Deleting Cost Data

Cost data can be deleted, as explained below.

1. Click on the arrow next to the Supplier field, and select the supplier from the pull-down menu.

2. Select the product with the cost data you need to delete.

Data associated with the selected product and supplier is displayed.

3. Select the cost record you need to delete, and click on the Delete button.

A confirmation message is displayed.

4. Click on Yes to delete the selected record.

Categories

Category refers to a group of related products (i.e., contraceptives, HIV/AIDS test kits, malaria drugs, etc.). It can also be used to categorize similar products (e.g., sexually transmitted infection treatment drugs). Use the Categories Tree View option to access Category data.

1. Click on the Categories Tree View option.

The Categories screen is displayed. See Figure 4-6.

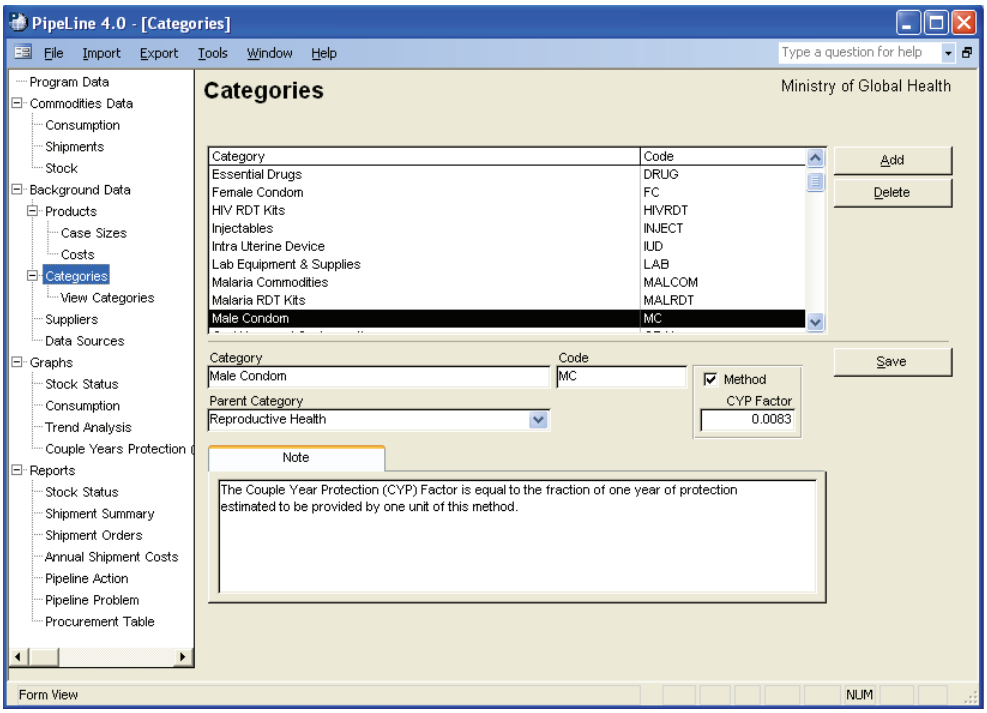


Figure 4-6—Categories screen

Adding a Category

Use the Add button to add a new category.

With the Categories screen displayed—

1. Click on the Add button.

PipeLine blanks out the data entry area of the Categories screen as shown in Figure 4-7.

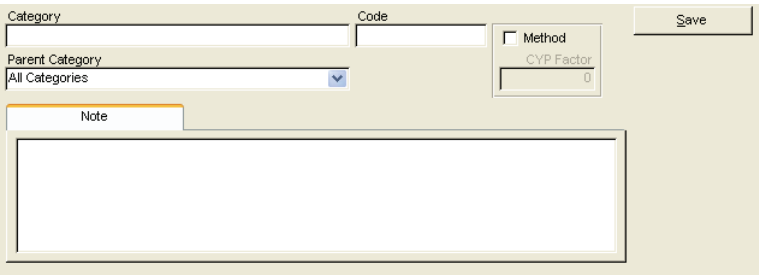


Figure 4-7—Categories screen data entry area

2. Type the category name.

The Code field holds the category's code, which is used to help identify the category. Data in the Code field is created based on the name you give the category.

You may keep the PipeLine-generated code or use your own coding system.

To change the PipeLine-generated code—

3. Highlight the PipeLine-generated code, and type the new code.

	You are limited to 10 characters, which can be numbers, letters, spaces, or a combination of these.

The Parent Category field identifies the primary group to which the new category belongs.

4. Click on the arrow next to the Parent Category field, and select an appropriate category from the pull-down menu.

The Method field allows you to associate the new category with a CYP Factor.

A CYP factor is the couple-years of protection. The CYP factor is the fraction of a year of protection provided by one unit of a particular contraceptive product. The CYP factor field can only be used if the category you are creating has been designated a *Method*.

5. Click on the Method field if you want to designate the category as a method.

6. Type the CYP factor.

The Note field is a memo field for additional information about the new category.

7. Type any relevant notes in the Note field.

When you finish adding category data—

8. Click on the Save button to save the data.

Editing Category Data

Use the Categories Tree View option to edit the category data.

With the Categories screen displayed—

1. Select the category you want to edit.
2. Click in the field you want to edit, and enter the new data.

When you finish editing—

3. Enter any relevant notes in the Note field about the changes made.
4. Click on the Save button to save the changes.

Deleting a Category

Use the Delete button to delete a category.

With the Categories screen displayed—

1. Click on the category you want to delete.
2. Click on the Delete button.

If the category can be deleted, PipeLine will display a confirmation message.

3. Click on Yes to confirm the delete.

If you cannot delete the category (because it is associated with other database records), PipeLine will display a message window.

4. Click on OK to close the message window.

Viewing Category Relationships

The View Categories option of the Tree View enables you to view all existing categories and their relationships (if any).

1. Click on the View Categories option of the Tree View.

All existing categories and types are listed. See Figure 4-8.

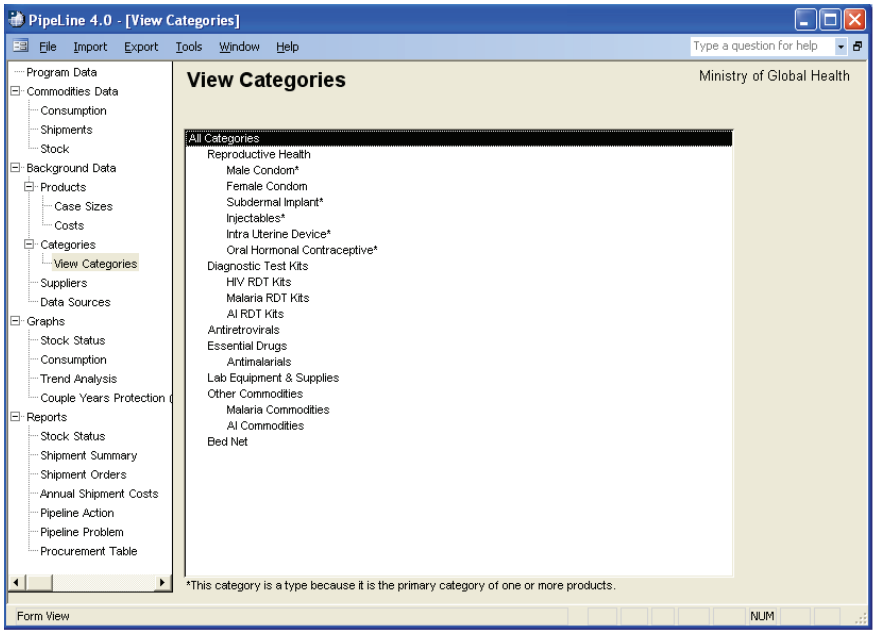


Figure 4-8—View Categories screen

	Categories designated as types in product records are displayed with an asterisk (*).

Suppliers

Use the Suppliers option of the Tree View to modify the Supplier pull-down menu, change shipment lead times by supplier, and to estimate shipping costs by supplier.

1. Click on the Suppliers Tree View option.

Pipeline displays the Suppliers screen. See Figure 4-9.

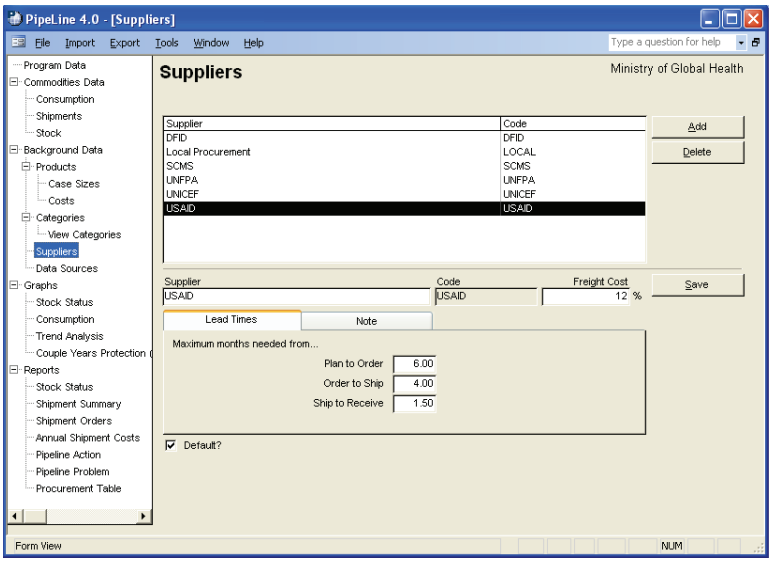


Figure 4-9—Suppliers screen

Adding a Supplier

Use the Add button to add a supplier.

With the Supplier screen displayed—

1. Click on the Add button.

PipeLine blanks out the lower half of the Suppliers screen (see Figure 4-10).

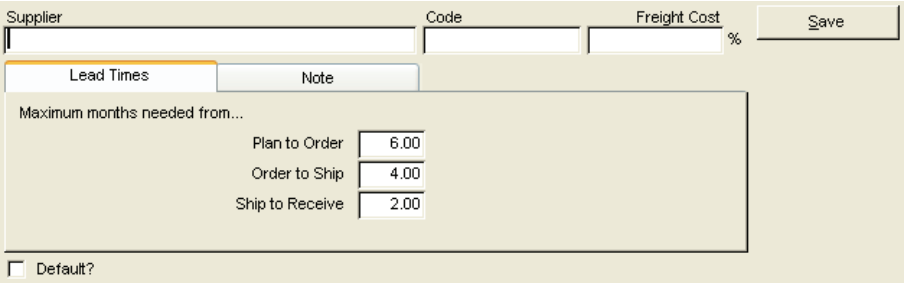


Figure 4-10—Suppliers screen data entry area

2. Click in the Supplier field, and type the supplier's name.

The Code field holds the supplier's code, which identifies the supplier. Data in the Code field is created based on the name you give the supplier.

You may keep the PipeLine-generated code or use your own coding system.

To change the PipeLine-generated code—

3. Highlight the PipeLine-generated code, and type the new code.

	You are limited to 10 characters, which can be numbers, letters, spaces, or a combination of these.

The Freight Cost field shows the approximate freight cost for a shipment as a percentage of the shipment's value. If you do not fill in this field, PipeLine uses the program's default freight cost.

4. Click in the Freight Cost field, and type the freight cost percentage.

The Default field shows that the supplier is the default supplier for your program. PipeLine chooses the default for a product when no supplier is specified.

5. Click in the Default field if the new supplier will be your default supplier.

Lead Times Tab

The Plan to Order field shows the estimated lead time (in months) expected from the time a shipment is planned to when it is ordered. The default is 6.00 (six-month lead time). To change the default—

6. Click on the Plan to Order field, and type the plan to order lead time.

The Order to Ship field shows the estimated lead time (in months) expected from the time a shipment is ordered to when it is shipped. The default is 4.00 (four-month lead time). To change the default—

7. Click on the Order to Ship field, and type the order to ship lead time.

The Ship to Receive field shows the estimated number of months expected from the time a shipment is shipped until it is received. The default is 2.00 (two-month lead time). To change the default—

8. Click on the Ship to Receive field, and type the ship to receive lead time.

The Note Tab

Use the Note Tab to add a memo about the supplier.

9. Click on the Note tab, and type any relevant note about the new supplier.

10. Click on the Save button to save your data.

Editing Supplier Data

With the Suppliers screen displayed—

1. Select the supplier you want to edit.
2. Click in the field you want to edit, and enter the new data.
3. Click on the Note tab, and type the reason for the edit.
4. Click on the Save button to save your changes.

Deleting a Supplier

Use the Delete button to delete a supplier.

With the Suppliers screen displayed—

1. Select the supplier you want to delete, and click on the Delete button.

If the supplier can be deleted, PipeLine will display a confirmation message.

2. Click on Yes to confirm the delete.

If you cannot delete the supplier (because it is associated with other database records), PipeLine will display a message window.

3. Click on OK to close the message window.

Data Sources

The Data Sources option of the Tree View enables you to indicate sources from which pipeline data is gathered. Data Source records are grouped as follows:

- **Actual Consumption**—sources for actual consumption records
- **Forecast Consumption**—sources for forecast consumption records
- **Stock**—sources for stock records, including stock count and adjustment
- **Shipments**—sources for shipment records.

1. Click on the Data Sources Tree View option to access the Data Sources screen.

PipeLine displays the Data Sources screen (see Figure 4-11).

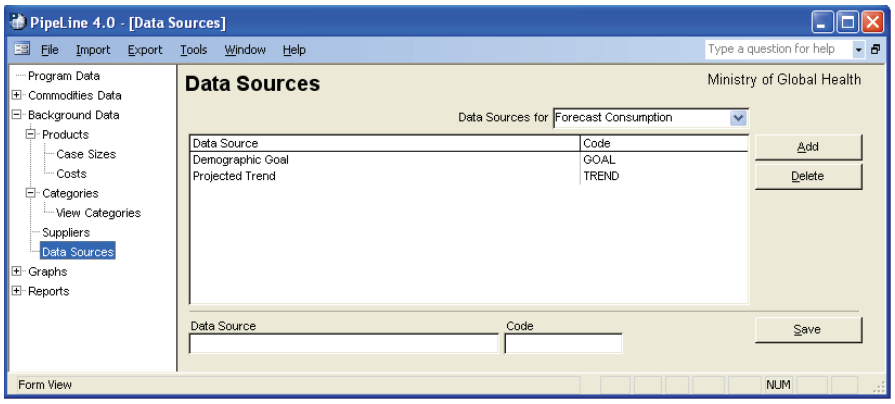


Figure 4-11—Data Sources screen

Adding a Data Source Option

Use the Add button to add a new data source option.

1. Click on the arrow next to the Data Sources For field, and from the pull-down menu, select the data source group where you want to add a new option.

2. Click on the Add button.

PipeLine blanks out the lower half of the Data Sources screen (see Figure 4-12).

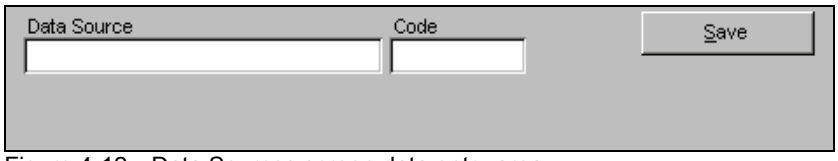


Figure 4-12—Data Sources screen data entry area

3. Type the source name.

The Code field holds the code for the data source's code, which identifies the data source option. Data in the Code field is created based on the name you give the data source option.

You may keep the PipeLine-generated code, or use your own coding system.

To change the PipeLine-generated code—

4. Highlight the PipeLine-generated code, and type the new code.

	You are limited to 10 characters, which can be numbers, letters, spaces, or a combination of these.

5. Click on the Save button to save the data.

Editing Data Source Options

You can edit Data Sources information as described below.

With the Data Sources screen displayed—

1. Click on the arrow next to the Data Sources For field, and select the data source group from the pull-down menu.

2. Click on the data source option you need to edit.

3. Click in the field you need to edit, and type the new data.

4. Click on the Save button to save the changes.

Deleting a Data Source Option

Use the Delete button to delete a data source option.

With the Data Sources screen displayed—

1. Click on the arrow next to the Data Sources field, and from the pull-down menu, select the data source group with the information you want to delete.

2. Click on the data source option you need to delete.

3. Click on the Delete button.

If the data source option can be deleted, PipeLine will display a confirmation.

4. Click on Yes to confirm the delete.

If you cannot delete the data source option (because it is associated with other database records), PipeLine will display a message window.

5. Click on OK to close the message window.

5 COMMODITIES DATA

Introduction

The Commodities Data option helps you track the movement of stock within your pipeline. Stock movements are events that change the stock quantity of a product in a program's entire logistics system. Stock movements belong to one of the following categories:

- **Consumption—**stock dispensed by the program to clients
- **Shipments**—stock received by the program from suppliers
- **Stock—**amount of product on hand, expressed in two ways:
  - **Stock count—**physical inventory of stock on hand within the entire program.
  - **Stock adjustments**—events or transactions that change the stock on hand within the entire program (i.e., loss of expired stock, transfers to or from another program, and others).

	PipeLine does not track a transfer or distribution of stock within the program. These movements must be recorded in the program's logistics management information system.

Consumption

Use the Consumption Tree View option to track actual or forecast consumption quantities of products dispensed to users, or sold by the program to clients.

- **Actual Consumption—**reported or estimated quantities of product that left the program's logistics system through normal dispense to clients activities.
- **Forecast Consumption**—quantities expected to be dispensed in the future.

1. Click on the Consumption Tree View option.

PipeLine displays the Consumption screen (see Figure 5-1).

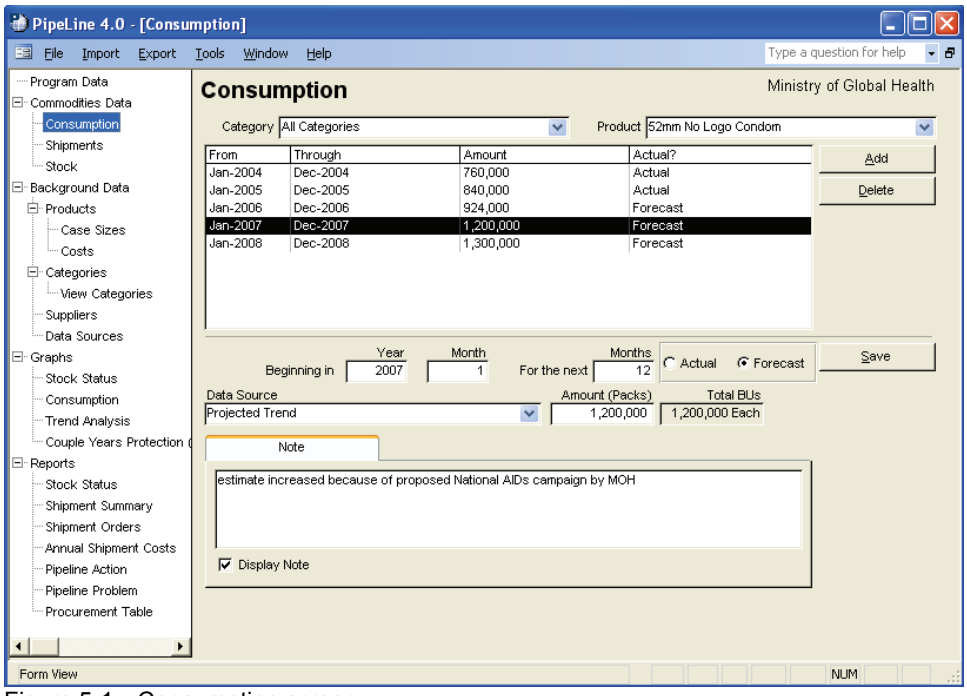


Figure 5-1—Consumption screen

Adding Consumption Data

To add consumption data from a file generated by an external forecasting system, see PipeLine Utilities – Import Consumption Data section. Use the Add button to add consumption data for a particular product.

With the Consumption screen displayed—

1. Click on the arrow next to the Category field, and select a category from the pull-down menu.
2. Click on the arrow next to the Product field, and select the product you want to add consumption data to.
3. Click on the Add button.

PipeLine blanks out the lower half of the Consumption screen (see Figure 5-2).

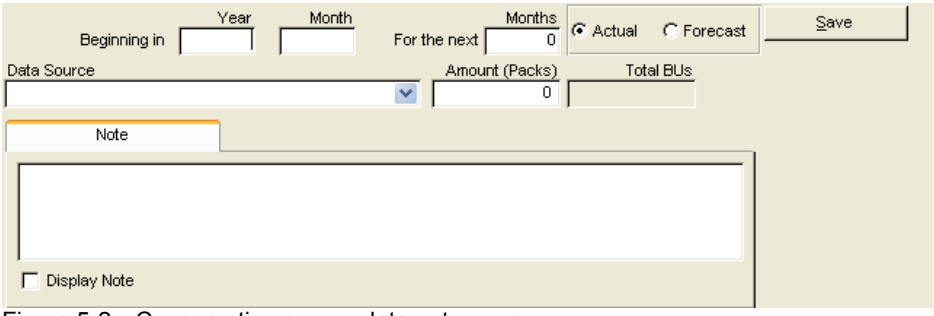


Figure 5-2—Consumption screen data entry area

Beginning In

This area enables you to set the consumption period, which can be any number of months.

The Year field shows the calendar year when the consumption period begins.

4. Type the four-digit year.

The Month field shows the month that marks the start of the consumption period. For example, “1” shows that the first month of the year is the start of the consumption period.

5. Click in the Month field, and type the month when the consumption period begins.

For the Next

The For the Next Months field shows the number of consecutive months in the consumption period. For example, “3” indicates a period of three months (one quarter).

6. Click in the For the Next Months field, and type the length of the consumption period (in months).

The Actual field shows that the consumption data comes from an actual source (for example, physical inventory records, dispense logs, etc.).

7. Click on the Actual field if the consumption data comes from an actual source.

The Forecast field shows that the consumption data is an estimated projection.

8. Click on the Forecast field if the consumption data comes from a forecast estimate.

The Data Source field shows the type of data used to compute consumption.

9. Click on the arrow next to the Data Source field, and select a data source from the pull-down menu.

The Amount field shows the amount of consumption for this period. To calculate consumption for reports and graphs, this amount is divided by the number in the For the Next Months field.

10. Click in the Amount field, and type the consumption amount.

	Total BUs (Basic Units) Total consumption Basic Units (BUs) are displayed. This is your consumption amount converted to basic units. (Pack times pack size.)

The Note field is a memo area used to include additional information about the data.

11. Click on the Note field, and type any relevant notes about the consumption data.

The Display Note field tells PipeLine to include the note in PipeLine reports.

12. Click on the Display Note field to include the note in reports.

13. Click on the Save button to save the data.

Editing Consumption Data

Consumption data for a particular product can be edited.

With the Consumption screen displayed—

1. Select the Category for the product you want to edit.

	If you do not recall the name of the category for the product you need to edit, select All Categories from the Category pull-down menu to access all the products in your program.

2. Click on the arrow next to the Product field, and select the product you need to edit from the pull-down menu.
3. Click on the consumption data you need to edit.
4. Click in the field you need to edit, and type the new data.
5. Click on the Save button to save the data.

Deleting Consumption Data

Use the Delete button to delete the consumption data for a particular product.

With the Consumption screen displayed—

1. Click on the Category field, and select the category from the pull-down menu.

2. Click on the arrow next to the Product field, and select the product that you need to delete consumption data from.

3. Click on the consumption data you need to delete.

4. Click on the Delete button, and a confirmation is displayed.

5. Click on Yes to delete the selected consumption data.

Shipments

Use the Shipment Tree View option to add, modify and delete shipping data.

1. Click on the Shipments Tree View option to display the Shipments screen (see Figure 5-3).

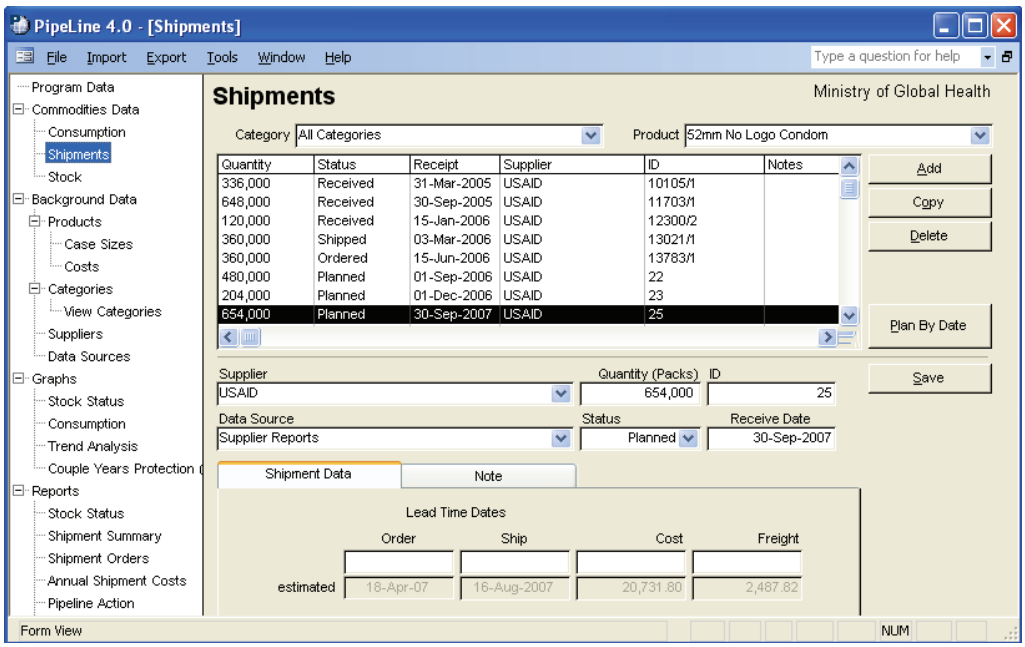


Figure 5-3—Shipments screen

Adding Shipment Data

Use the Add button to add shipment data to a particular product.

With the Shipments screen displayed—

1. Click on the arrow next to the Category field, and select the category from the pull-down menu.

2. Click on the arrow next to the Product field, and from the pull-down menu, select the product receiving the shipment data.

3. Click on the Add button.

PipeLine blanks out the lower half of the Shipment screen (see Figure 5-4). The Supplier values will drop down (not shown), and the Status field will display a default value of "Planned."

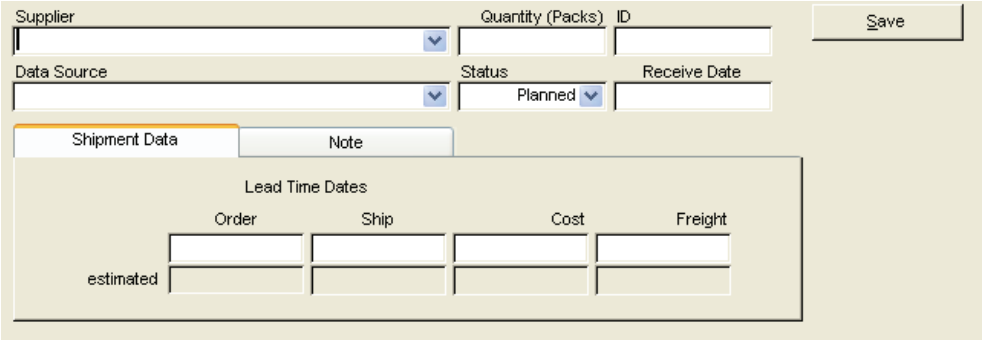


Figure 5-4—Shipments screen data entry area

4. Select the shipment's supplier from the pull-down menu.

5. Click in the Quantity field, and type the shipment quantity (in units).

The ID field uniquely identifies the shipment. You can use the NEWVERN shipment number, a purchase order number, an invoice number, or any other unique identifier. You can also accept the PipeLine-generated code.

To enter a code of your choice—

6. Click in the ID field, and type the shipment ID.

The Data Source field shows the data source associated with the shipment record.

7. Click on the arrow next to the Data Source field, and select the data source from the pull-down menu.

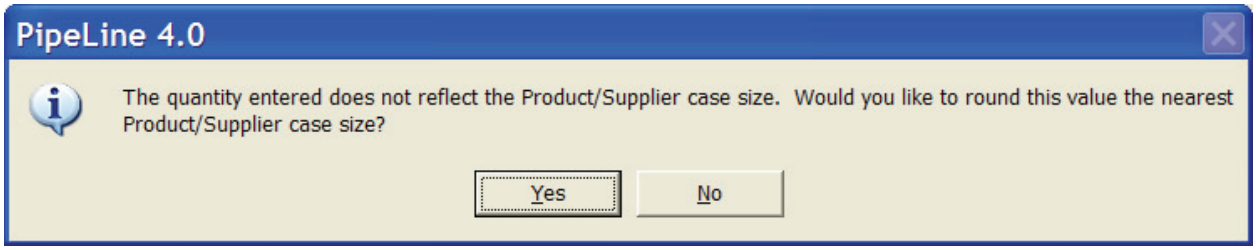
The Status field shows the shipment's status. The default value for this field is Planned. To change the default value—

8. Click on the arrow next to the Status field, and select the shipment status from the pull-down menu.

The Receive Date field shows the date the shipment was or is expected to be received. **Each shipment record must have a receipt date.**

9. Click in the Receive Date field, and type the shipment's receipt date.

After entering a value in the Receive Date field, depending on the quantity entered and the background product information, a message window be displayed, which notes that the quantity entered does not reflect the Product/Supplier case size. PipeLine will prompt you to round the value to the nearest Product/Supplier case size. Select "Yes" or "No."



Shipment Data Tab

The Shipment Data tab displays the shipment's actual or estimated lead times, and the shipment and freight cost.

Order (actual/estimated)

The top field shows the actual date the shipment was or is to be ordered. The Estimated field is calculated based on lead times for the supplier. To override the estimate—

10. Click on the top field, and type the shipment's order date.

Ship (actual/estimated)

The top field shows the date the shipment was or is to be shipped. The Estimated field is calculated based on lead times for the supplier. To override the estimate—

11. Click on the top field, and type the ship date.

Cost (actual/estimated)

The top field shows the shipment's actual cost. The Estimated field is calculated based on the product's current effective product cost on the ship date. To override the estimate—

12. Click on the top field, and type the shipment's exact cost.

Freight (actual/estimated)

The top field shows the actual freight cost. This amount includes any additional charges (i.e., clearance fees) incurred while getting the product delivered. The estimated field shows a calculation based on a percentage of the product cost. To change the estimate—

13. Click on the top field, and type the shipment's actual freight cost.

The Note Tab has a memo field for additional information about the shipment.

14. Click on the Note Tab, and type any relevant notes about the shipment.

The Display Note field tells PipeLine to include the note in the PipeLine reports.

15. Click on the Display Note field to include the note in PipeLine reports.

16. Click on the Save button to save the data.

Editing Shipment Data

Shipment data for a particular product can be edited.

With the Shipments screen displayed—

1. Select the Category for the product you want to edit.

> If you do not remember the category for the product you need to edit, select All Categories from the Category pull-down menu to access all the products in your program.

2. Click on the arrow next to the Product field, and from the pull-down menu, select the product you need to edit.
3. Click on the shipment record you need to edit.
4. Click in the field you need to edit, and type the new data.
5. Click on the Save button to save the data.

Copying Shipment Data

The Copy button enables you to copy shipment data. Copied data can be edited to reflect a particular shipment, which reduces the amount of data entry required.

With the Shipments screen displayed—

1. Click on the arrow next to the Category field, and select the category for the product you need to copy shipment data from.
2. Click on the arrow next to the Product field, and select the product you need to copy shipment data from.
3. Select the shipment data you need to copy.
4. Click on the Copy button.

! !	You must enter a new receipt date in the Receive Date field. PipeLine assigns an ID number to the copied data.

5. Edit the shipment record, as needed.
6. Click on the Save button to save the changes.

Plan Shipments By Date

PipeLine enables you to add shipments based on the amount of stock needed to reach a desired stock level on a date you specify for selected products. Use the Plan By Date button to plan shipments.

With the Shipments screen displayed—

1. Click on the Plan By Date button.

The Plan By Date window is displayed (see Figure 5-5). This window includes every product in the currently selected category for the current program.

2. Click on the product(s) you want to plan based on the product's receipt date.
3. Click in the Receive Date field, and type the date you want the shipment(s) delivered.
4. Click on the OK button.

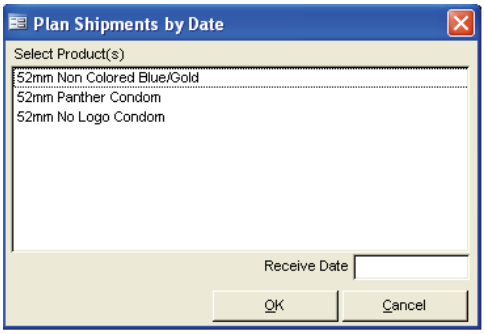
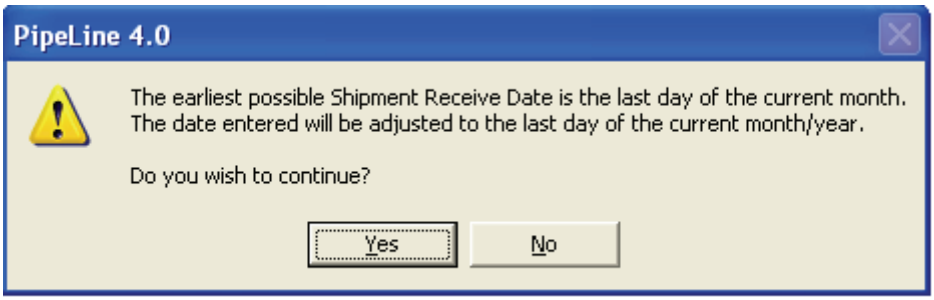


Figure 5-5—Plan By Date window

If the receipt date you enter is not the last day of the current month, a message is displayed.



5. Click on the Yes button.

Deleting Shipment Data

Use the Delete button to delete the shipment data of a particular product.

With the Shipments screen displayed—

1. Click on the arrow next to the Category field, and select the category from the pull-down menu.
2. Click on the arrow next to the Product field, and select the product from the pull-down menu.
3. Select the shipment record you need to delete.
4. Click on the Delete button, and a confirmation message is displayed.
5. Click on Yes to delete the selected shipment data.

Stock

Use the Stock Tree View option to track products already in stock, or to track products during a physical inventory of your entire program when the stock balances are known or estimated.

1. Click on the Stock Tree View option.

PipeLine displays the Stock screen (see Figure 5-6).

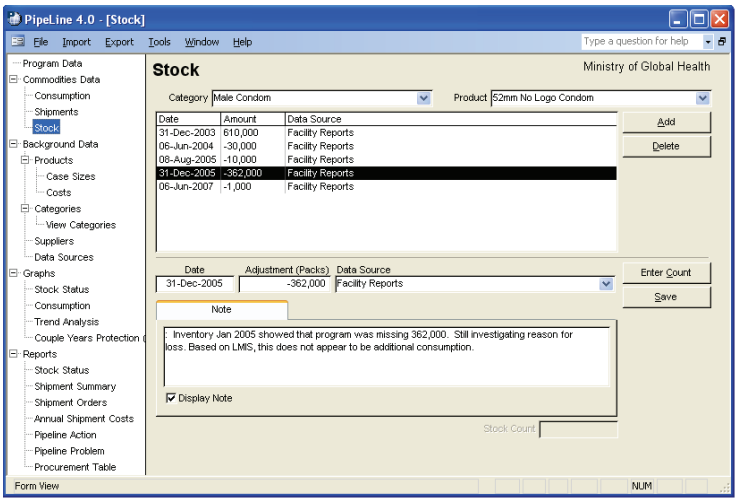


Figure 5-6—Stock screen

Adding Stock Data

Use the Add button to record positive or negative quantities that would change a program's stock balance. These changes are not due to consumption or shipments. They are, most often, due to losses or transfers.

With the Stock screen displayed—

1. Click on the arrow next to the Category field, and select the category from the pull-down menu.
2. Click on the arrow next to the Product field, and select the product from the pull-down menu.
3. Click on the Add button.

PipeLine blanks out the lower half of the Stock screen (see Figure 5-7).

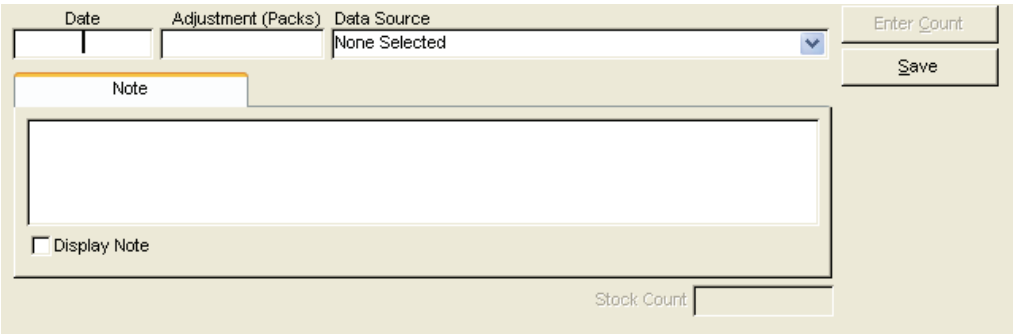


Figure 5-7—Stock screen data entry area

The Date field displays the date the adjustment occurred, or when it is expected to occur.

4. Type the date of the adjustment.

The Adjustment (Packs) field shows the adjustment amount (in units).

- A loss is recorded as a negative number (i.e., -1, -33, -100, etc.). This adjustment is *subtracted* from the month's ending balance.

- A transfer into your program from another program is recorded as a positive number (for example, 1, 33, 100, etc.). This adjustment is *added* to the month's ending balance.

5. Click in the Adjustment (Packs) field, and type the adjustment amount.

Entering Stock Count Data

Use the Enter Count button to calculate an adjustment based on the inventory count data.

	You must enter a date before you can use the Enter Stock Count feature.

6. Click on the Enter Count button.

The Stock Count window is displayed (see Figure 5-8).

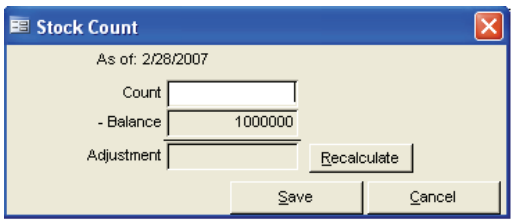


Figure 5-8—Stock Count window

The Count field displays the amount of the product in stock (in units) as of the date you specified. This value includes storage facilities and service delivery points.

7. Type the stock count.

The Recalculate button allows PipeLine to calculate the adjustment by subtracting the current balance from the entry in the count field. Figure 5-9 displays the Stock Count window, and shows an adjustment based on supplied data.

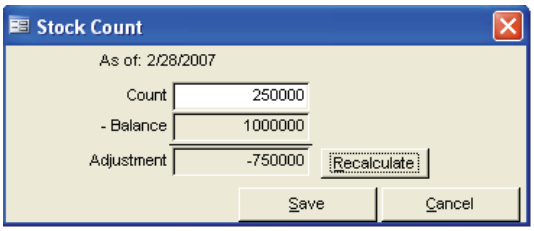


Figure 5-9—Stock Count window with adjustment

8. Click on the Save button to save the data.

PipeLine populates the Adjustment and Stock Count fields based on the data you enter.

The Data Source field displays the source of the adjustment.

9. Click on the arrow next to the Data Source field, and select the data source from the pull-down menu.

The Note field is a memo field where you can enter additional information about the adjustment.

!!	Always explain the adjustment. • If a loss, note the reason for the loss. • If a transfer, note the source or destination of the transfer.

10. Click on the Display Note field to include the note in the PipeLine reports.
11. Click on the Save button to save the data.

Editing Stock Data

Stock data for a particular product can be edited.

With the Stock screen displayed—

1. Select the Category for the product you want to edit.

> If you do not remember the category for the product you need to edit, select All Categories from the Category pull-down menu to access all the products in your program.

2. Click on the arrow next to the Product field, and select the product you need to edit from the pull-down menu.
3. Select the stock record you need to edit.
4. Click in the field you want to edit, and type the new data.
5. Click on the Save button to save the data.

Deleting Stock Data

Use the Delete button to delete selected stock data from a selected product.

With the Stock screen displayed—

1. Click on the arrow next to the Category field, and select the category from the pull-down menu.
2. Click on the arrow next to the Product field, and select the product from the pull-down menu.

3. Select the record you want to delete and click on the Delete button.

A confirmation message is displayed.

4. Click on Yes to delete the selected data.

6 PIPELINE GRAPHS

Introduction

This section lists the PipeLine graphs and provides a brief description of each. Also included is guidance on how to use the output from the graphs for pipeline monitoring and procurement planning.

PipeLine Graphs

PipeLine can create the following graphs.

Stock Status

Monthly or quarterly bar chart showing the actual and projected months of stock for a product or type, compared to the program's maximum and minimum levels.

Consumption

Monthly or quarterly bar chart showing actual and forecast consumption by product or type.

Trend Analysis

Monthly or quarterly bar chart showing a trend analysis of a selected set of consumption data for a particular product.

Couple-Years of Protection (CYP)

Monthly or quarterly bar chart showing actual and forecasted couple-years of protection (CYP) by product or method.

	The couple-years of protection (CYP) graph can only be created for products that belong to a *Method* with a CYP factor.

Stock Status Graph

The Stock Status graph provides a quick view of your program's actual and forecasted stock levels. It creates a bar chart, by month or quarter, showing months of stock for a selected product or type that is expected to be available in your logistics system at the end of the month or quarter. If you enter the maximum and minimum desired stock levels for a product, these are displayed and compared to estimated stock balances.

When you talk with policymakers, donors, and other suppliers, use this graph to show an overview of your stock situation. If the graph shows forecast stock levels that are far below your minimum, or if it projects that you will stock out of the product or type, you should begin plans to obtain additional supplies. You may also need to review your consumption forecast for accuracy.

If the graph shows actual stock levels that are far below minimum or above maximum, review past procurement plans and your inventory control procedures to determine why stock levels are out of balance. Better inventory control procedures, or more accurate stock data, may prevent future problems.

Creating a Stock Status Graph

The Stock Status graph is based on the last product or method that was updated or displayed. The default time period is five years, which includes the current year, previous two years, and following two years. Using stock data, you can create a stock status graph for any product in your program.

	The procedure for creating a Stock Status graph is the same regardless of the product you choose.

The following explains how to create a Stock Status graph.

From the Tree View—

1. Click on the Stock Status Tree View option (under Graphs) to display the Stock Status screen (see Figure 6-1).

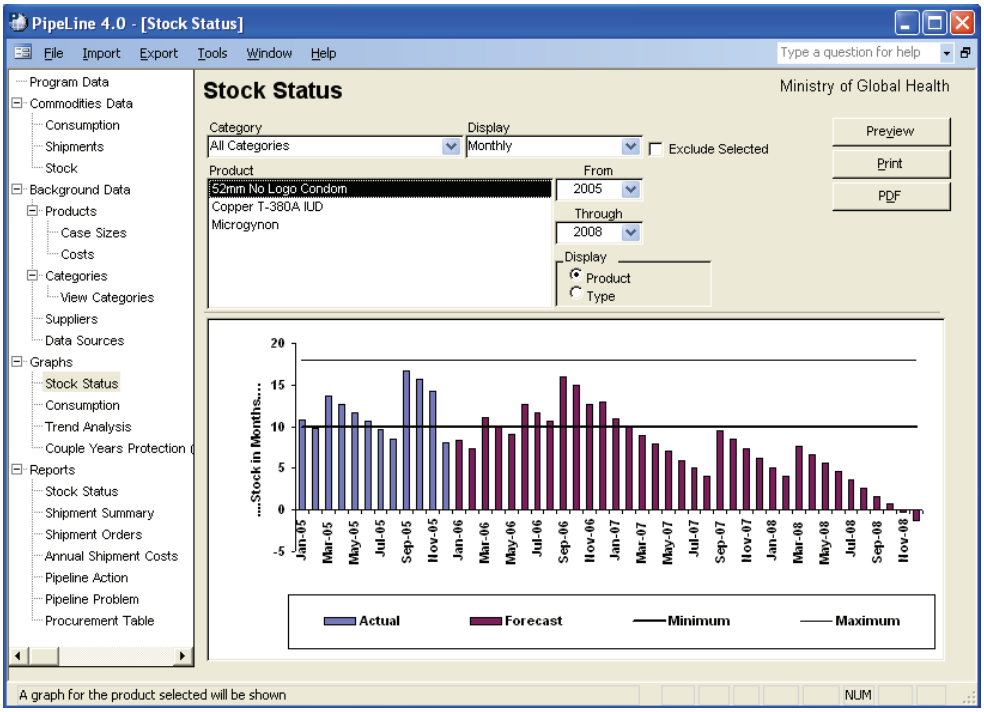


Figure 6-1—Stock Status screen

2. Click on the arrow next to the Category field, and select a category from the pull-down menu.

   Or, select All Categories from the Category pull-down menu to access all the products in your program.

The Display field enables you to create a graph that displays stock data on a monthly or quarterly basis.

3. Click on the arrow next to the Display field, and select Monthly to display the data by month or Quarterly to display the data by quarter.

Products and Types

Using PipeLine, you have the option of selecting items by Product or Type (see Figure 6-2).

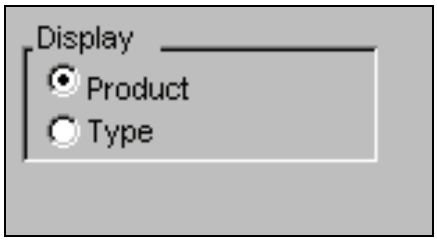


Figure 6-2—Display options

The Product option is selected by default. To display data by Type, which is a list of Types filtered by Category,—

4. Click on the Type option.

PipeLine changes the label of the Product box to Type, and it displays all Types associated with the selected category (see Figure 6-3).

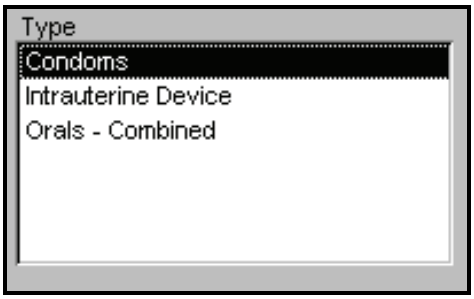


Figure 6-3—Display options

The Product/Type box shows the product(s) you can select to create a stock status graph.

5. Click on the Product or Type you need to create the graph.

The From and Through fields let you determine the span of time the graph will cover.

6. Click on the arrow next to the From field, and select the starting year for the report period.

7. Click on the arrow next to the Through field, and select the last year of the report period.

Excluding Planned Shipments

The Exclude Selected field enables you to exclude planned shipments from the Stock Status graph by letting you exclude the suppliers of these shipments from the output.

8. Click on the Exclude Selected field.

The Select Suppliers to Exclude box opens, displaying the suppliers of your products (see Figure 6-4).

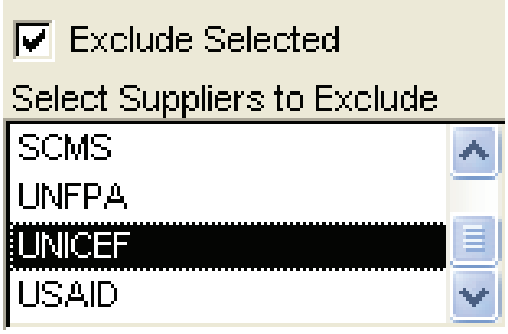


Figure 6-4—Select Suppliers to Exclude box

9. Click on the suppliers whose planned shipments you want to exclude from the graph.

To select more than one supplier—

10. Hold down the Control key <Ctrl>, and click on each supplier you want excluded from the graph.

See page 6-11 for information on previewing, printing, and creating a PDF of the Stock Status graph.

Consumption Graph

The Consumption graph shows actual and forecast consumption (quantity dispensed to clients) of a selected product/type. This graph can display monthly or quarterly consumption.

Use this graph when you discuss the reasonableness and reliability of your consumption forecasts. If the pattern or quantity of the forecast consumption is different from the actual consumption, ask why. If future growth is projected to be more rapid than past growth, have good justification based on program plans and evidence that other necessary resources (staff, facilities, money) will be available.

Creating a Consumption Graph

The graph is based on the last product or method and the period updated or displayed. The default period is five years (the previous two years, current year, and following two years). A graph can be created for a specific product or type.

From the Tree View—

11. Click on the Consumption Tree View option.

The Consumption Graph screen is displayed (see Figure 6-5).

12. Click on the arrow next to the Category field, and select a category from the pull-down menu.

    Or, select All Categories from the Category pull-down menu to access all the products in your program.

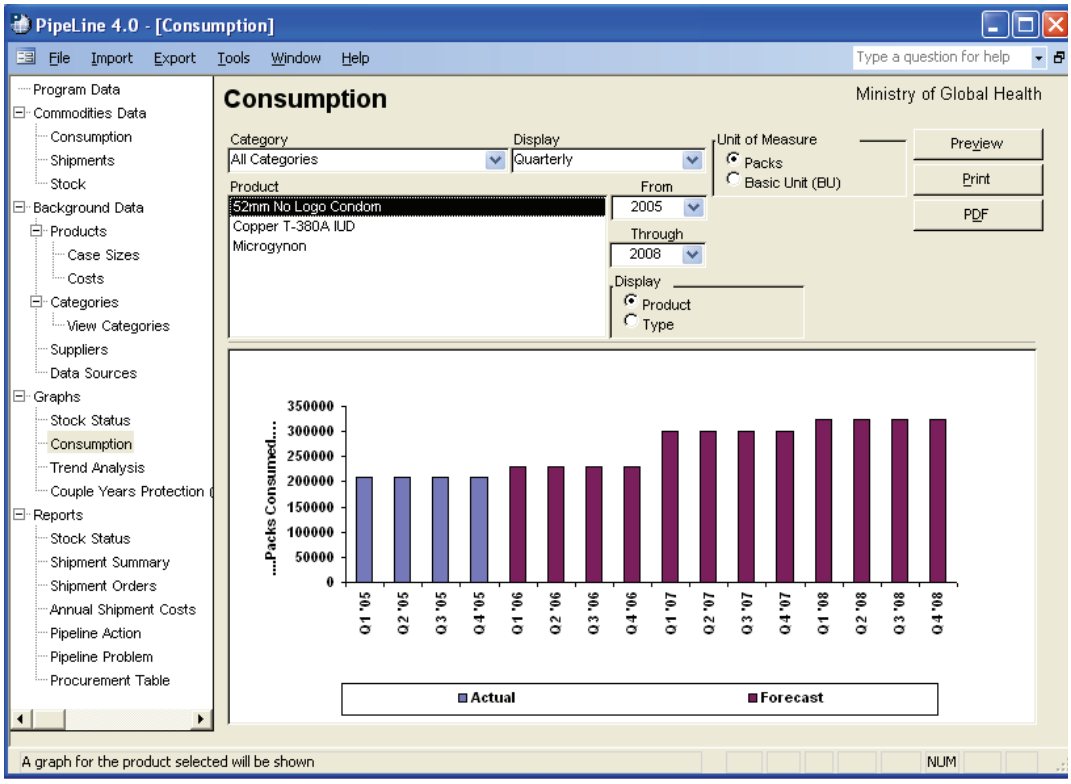


Figure 6-5—Consumption screen

The Display field lets you create a graph that displays stock data on a monthly or quarterly basis.

3. Click on the arrow next to the Display field, and select Monthly to display the data by month or Quarterly to display the data by quarter.

Products and Types

Using PipeLine, you can select items by Product or Type (see Figure 6-6).

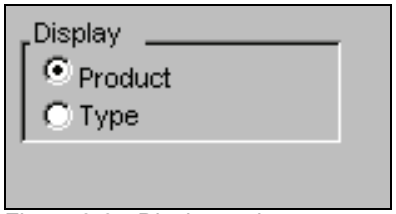


Figure 6-6—Display options

The Product option is selected by default. To display data by Type, which is a list of Types filtered by Category,—

4. Click on the Type option.

PipeLine changes the label of the Product box to Type and displays all Types associated with the selected category (see Figure 6-7).

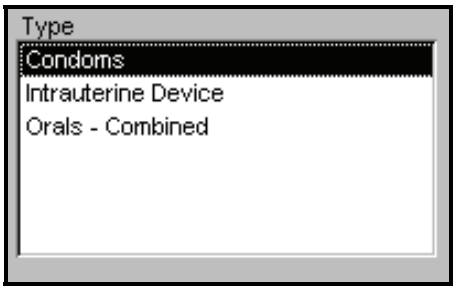


Figure 6-7— Display options

The Product/Type box shows the products that you can select to create a stock status graph.

5. Click on the Product or Type you need to create the graph.

The From and Through fields enable you to determine the span of time the graph will cover.

6. Click on the arrow next to the From field, and select the starting year of the report period.
7. Click on the arrow next to the Through field, and select the last year of the report period.

The Unit of Measure area (see figure 6-10) lets you select whether Packs or Basic Units are displayed.

8. Click on the Packs field to create a report based on packs.

   Click on the Basic Unit (BU) field to create a report based on the basic units.

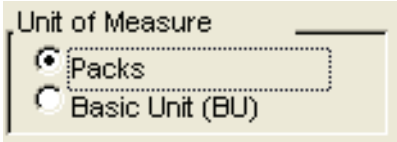


Figure 6-10—Unit of Measure Values

See page 6-11 for information on previewing, printing, and creating a PDF of the Consumption graph.

Trend Analysis Graph

The Trend Analysis Tree View option plots a straight line trend through actual consumption data and calculates the quantity on the trend line that corresponds to each month, quarter, and year up to ten years from the first trend year. The trend is based on the *Semi-Average* or *Linear Regression* calculation method.

Semi-Average

Divides the actual consumption data into the first and second half, and calculates the average of each. If the series is an odd number, the middle number is included in both averages. The trend is calculated to intercept these averages.

Linear Regression

Is a statistical formula applied to the actual consumption data series to minimize the distance of the data series points from the trend.

The trend is calculated based on actual consumption by month, as reported in the Stock Status report. However, a report showing the data by quarter may be more useful. Use the Monthly display if you entered monthly consumption data, and if you want to see the seasonality or variation of the data compared to the straight trend.

The first year of the report must have actual consumption records because the trend is calculated based on *actual* consumption records in the first year and subsequent actual consumption records up to ten years (if they exist). The trend is calculated and displayed for a period up to ten calendar years from the first year.

Use this report to compare your forecast to the trend of actual data, or use it as a starting point for or analysis of, a new forecast.

Creating a Trend Analysis Graph

This graph shows consumption data in PipeLine and the trend of the actual consumption data. Forecast consumption data are displayed in a bar graph that is not in the trend calculation.

From the Tree View—

1. Click on the Trend Analysis Tree View option.

The Trend Analysis screen is displayed (see Figure 6-8).

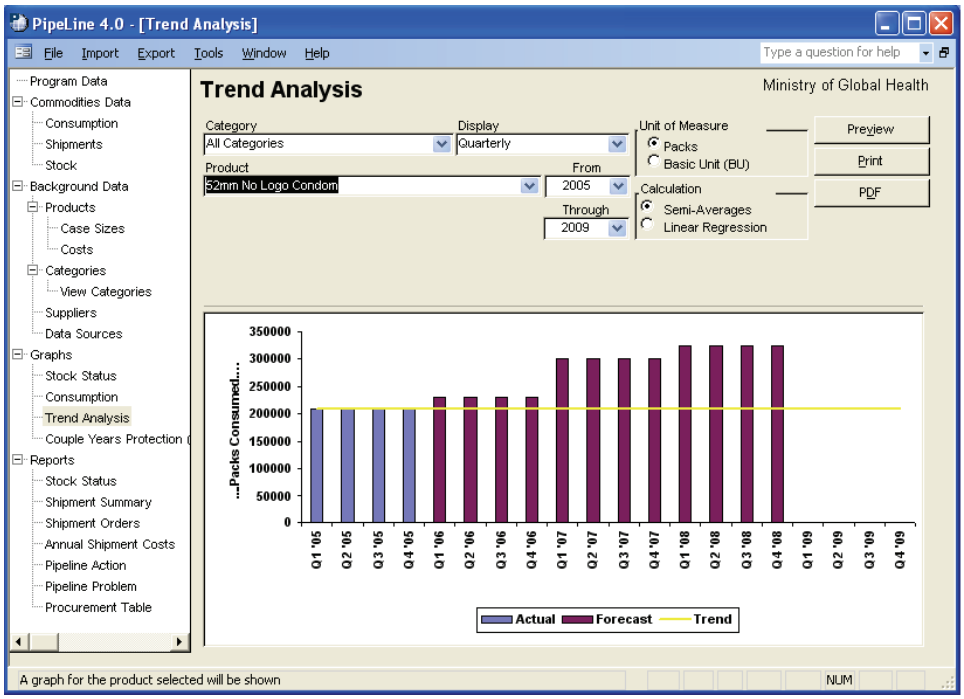


Figure 6-8—Trend Analysis screen

2. Click on the arrow next to the Category field, and select a category from the pull-down menu.

   Or, select All Categories from the Category pull-down menu to access all the products in your program.

3. Click on the arrow next to the Product field, and select a product from the pull-down menu.

4. Click on the arrow next to the Display field, and select Monthly to display the data by month or Quarterly to display the data by quarter.

5. Click on the arrow next to the From field, and select the starting year of the report period from the pull-down menu.
6. Click on the arrow next to the Through field, and select the last year of the report period from the pull-down menu.

The Calculation area of the Consumption Trend Analysis screen (see Figure 6-9) lets you create a trend graph based on semi-averages or linear regression.

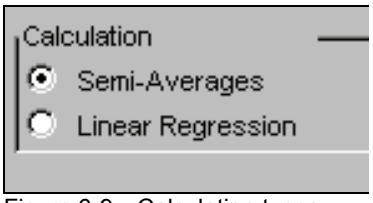


Figure 6-9—Calculation types

7. Click on the Semi-Averages field (under Calculation) to create a report based on semi-averages.

   Click on the Linear Regression field (under Calculation) to create a report based on linear regression.

The Unit of Measure area (see figure 6-10) lets you select whether Packs or Basic Units are displayed.

8. Click on the Packs field to create a report based on packs.

   Click on the Basic Unit (BU) field to create a report based on the basic units.

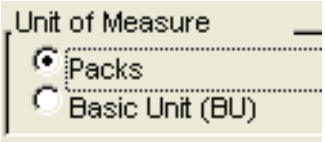


Figure 6-10—Unit of Measure values

See page 6-11 for information on previewing, printing, and creating a PDF of the Trend Analysis graph.

Couple-Years of Protection (CYP) Graph

The couple-years of protection (CYP) graph uses the conversion factors in the Categories table of the Background Data menu to convert consumption data for selected product(s) or method(s) to CYP units.

	The couple-years of protection (CYP) graph can only be created for products that belong to a *Method* with a CYP factor.

The graph lets you measure and compare the extent of coverage provided across methods. For example, you will need approximately 120 condoms to protect one couple for one year but you will need only four units of Depo-Provera. The coverage you achieve from 120 condoms consumed is comparable to four Depo-Provera injections.

You can compare coverage achievement over time despite changes in the method mix. You may dispense fewer units of contraceptives in the future, but if these units have higher CYP factors, you could provide greater coverage.

Use this graph to evaluate and monitor program coverage and achievement. (See the *FPPMES User's Manual* for more information.)

Creating the CYP Graph

This graph is based on the percentage of one year during which each counted unit of a product/method provides protection from pregnancy.

> *For example:* Four Depo-Provera injections are needed to provide one year of protection. Therefore, a single injection provides protection for .25 of a year (three months).

The number of CYPs is calculated by multiplying products/methods dispensed by the appropriate conversion factor. If 100 Depo-Provera injections were dispensed during a quarter, then 25 CYPs were generated (100 ×.25). To create a CYP graph—

From the Tree View—

1. Click on the Couple-Years of Protection (CYP) Tree View option.

The Couple-Years of Protection (CYP) screen is displayed (see Figure 6-10).

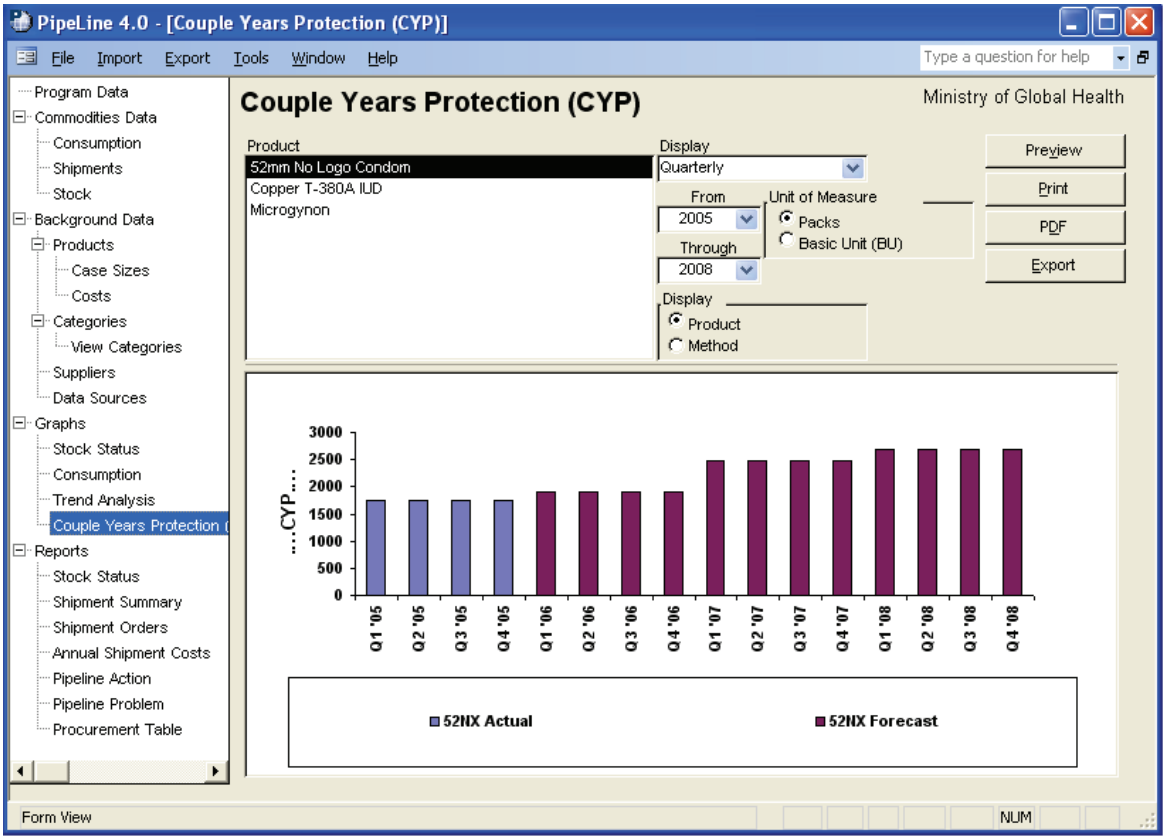


Figure 6-10—Couple-Years of Protection (CYP) screen

The Product option is selected by default. To display data by Method—

2. Click on the Method option.

PipeLine changes the label of the Product box to Method and displays all Methods associated with the selected category (see 6-11).

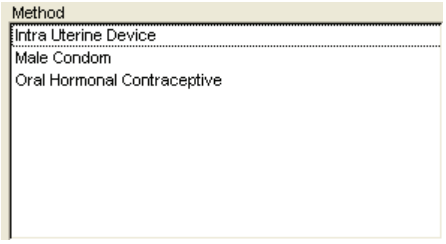


Figure 6-11— Display options

The Product/Method box shows which product you can select to create a stock status graph.

3. Select the Product(s)/Method(s) you want included on the graph.

4. Click on the arrow next to the Display field, and select Monthly to display the data by month or Quarterly to display the data by quarter.

5. Click on the arrow next to the From field, and select the starting year of the report period.

6. Click on the arrow next to the Through field, and select the last year of the report period.

   The Unit of Measure area (see figure 6-12) lets you select whether Packs or Basic Units are displayed.

7. Click on the Packs field to create a report based on packs.

   Click on the Basic Unit (BU) field to create a report based on the basic units.

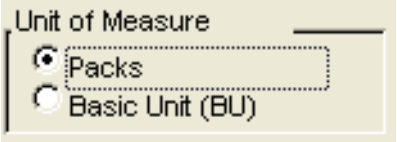


Figure 6-12—Unit of Measure Values

See page 6-11 for information on previewing, printing, and creating a PDF of the CYP graph.

Exporting the CYP Graph

Use the Export button to export the data of a CYP graph.

With the Couple-Years of Protection (CYP) screen displayed—

1. Create a CYP graph for a selected product/method.

See Creating the CYP Graph beginning on page 6-9.

2. Click on the Export button.

PipeLine displays the Export CYP Data window (see Figure 6-13). Use the options in this window to arrange the data in a Microsoft Office Excel spreadsheet.

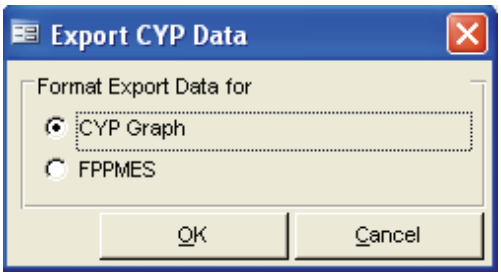


Figure 6-13—Export CYP Data window

CYP Graph

Incorporates the CYP factors into the consumption totals for use in ad hoc reports and graphs.

FPPMES

Arranges the data for use with the Family Planning Program Monitoring and Evaluation System.

The default is CYP Graph.

3. Click on the OK button to accept the default.

   Or, Click on FPPMES, and click on the OK button.

PipeLine displays the Output window with the default file name (based on your selection) displayed in the File Name field.

4. Click on the OK button to accept the default.

   Or, click on the File Name field, and type the export file's name.

5. Click on the OK button to save the data in the selected format.

Previewing, Printing, and Creating a PDF of PipeLine Graphs

The procedure for previewing and printing PipeLine graphs is the same regardless of the type of graph you create.

Previewing a Graph

A compact version of the graph (regardless of the type you create) is continually displayed on the lower half of your screen. To preview the entire graph—

1. Click on the Preview button.

The selected graph is displayed onscreen for you to review. If you are satisfied with the data as presented, you can print the graph from the preview screen.

2. Click on the print icon to send the graph to your default printer.

3. Click on the close icon to return to the previous screen.

Printing a Graph

To send a graph directly to your default printer, without previewing it—

1. Click on the Print button.

Creating a PDF of a Graph

To create a PDF of a graph without previewing it—

1. Click on the PDF button.

To create a PDF of a graph from the preview of the graph—

2. Click on the Preview button.

3. Click on the PDF icon to create a PDF of the graph.

! !	To create a PDF, you must first choose a PDF writer. For more information on choosing a PDF writer, see page A-16.

7 PIPELINE REPORTS

Introduction

This section describes the PipeLine reports and provides guidance on how to interpret and use these reports for pipeline monitoring and procurement planning.

The following PipeLine reports are available:

Stock Status

Spreadsheet by month or quarter showing detailed figures on which the Stock Status graph is based.

Shipment Summary

Report showing shipment costs, including product and freight costs, for selected supplier/status or product/status.

Shipment Orders

Report showing quantities and cost of orders for a selected supplier/status.

Annual Shipment Costs

Report showing the actual or estimated cost of shipments received or expected during a calendar year.

Pipeline Action

Report showing the next procurement action needed for products in your system.

Pipeline Problem

Report highlighting actual, or expected serious pipeline problems (e.g., stockouts, shortfalls, or surpluses), for products in your program.

Procurement Table

Report that generates data in the format used in USAID‘s contraceptive procurement tables (CPT).

Stock Status Report

This report is PipeLine's primary output. It includes the data maintained by PipeLine for a single product or type and for a selected period of calendar years. This report (on which a Stock Status graph is based) displays detailed figures for a selected product or type. Based on the product's commodities records, the report calculates the months of stock represented by the ending balance for each period, with shortfalls or surpluses, based on the product minimum and maximum levels.

Each row represents one period and displays the beginning balance, details (quantity, status and supplier) regarding shipments received or due, actual or forecast consumption, stock adjustments, stock in months, desired stock, shortfall/surplus, and ending balance. The desired stock shows the quantity needed in the period for the ending balance to meet the product's maximum desired quantity, and the Shortfall/Surplus is equal to the difference between the ending balance and minimum desired quantity, or the maximum desired quantity. Shortfalls are expressed in negative numbers. Surpluses are expressed in positive numbers. Shipments are displayed on the row of the period they have been (or are expected to be) received, regardless of the shipment's status or lead time.

Use this report for detailed procurement planning for each product. The Stock Status report displays the supplier and shipment status for each shipment. If shortfalls are projected, plan additional shipments, or advance the receipt date of expected shipments. If a surplus is projected, postpone a shipment, or reduce the quantity you expect to receive. If there are excessive unexplained adjustments, investigate the quality of your data.

Creating the Stock Status Report

The Stock Status report is based on the last product or method updated or displayed. The default time period is five years, which includes the current year, previous two years, and following two years. Using stock data, you can create a stock status report for any product in your program.

	The procedure for creating a Stock Status report is the same for every product you choose.

The following explains how to create a Stock Status report.

From the Tree View—

1. Click on the Stock Status Tree View option (under Reports) to display the Stock Status screen (see Figure 7-1).

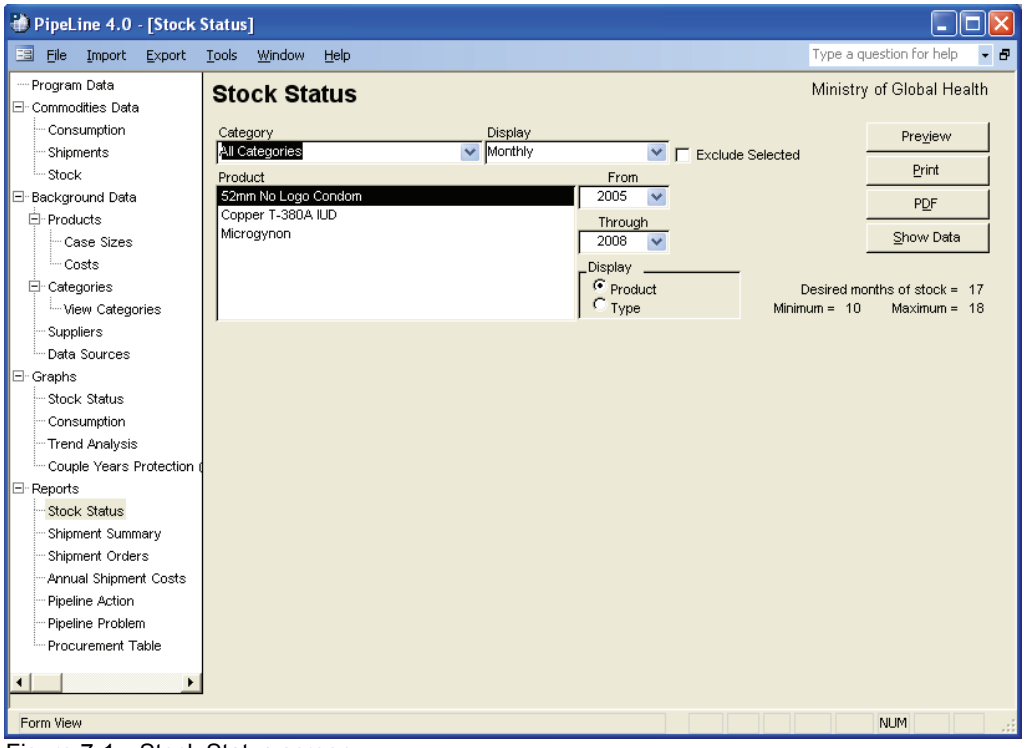


Figure 7-1—Stock Status screen

2. Click on the arrow next to the Category field, and select a category from the pull-down menu.

   Or, select All Categories from the Category pull-down menu to access all products in your program.

The Display field enables you to create a report displaying stock data on a monthly or quarterly basis.

3. Click on the arrow next to the Display field, and select Monthly to display the data by month or Quarterly to display the data by quarter.

Products and Types

PipeLine gives you the option of selecting items by Product or Type (see Figure 7-2).

The Product option is selected by default. To display data by Type, which is a list of Types filtered by Category,—

4. Click on the Type option.

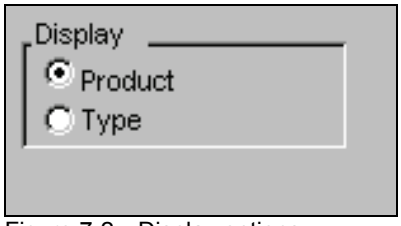


Figure 7-2—Display options

PipeLine changes the label of the Product box to Type and displays all Types associated with the selected category (see Figure 7-3).

The Product/Type box shows which product(s) you can select to create a stock status report.

Figure 7-3—Display options

5. Click on the Product or Type you need to create the report.

The From and Through fields let you determine the span of time the report will cover.

6. Click on the arrow next to the From field, and select the starting year of the report period.
7. Click on the arrow next to the Through field, and select the last year of the report period.

Excluding Planned Shipments

The Exclude Selected field enables you to exclude planned shipments from the Stock Status report by excluding the suppliers of these shipments from the output.

8. Click on the Exclude Selected field.

The Select Suppliers To Exclude box opens, showing the suppliers of your products (see Figure 7-4).

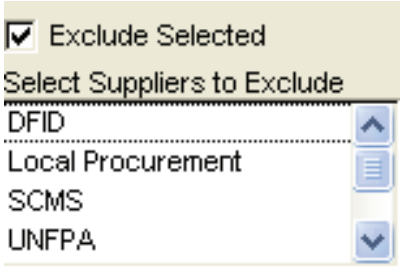


Figure 7-4—Select Suppliers to Exclude box

9. Click on the suppliers whose planned shipments you want excluded from the report.

To select more than one supplier—

10. Hold down the Control key <Ctrl>, and click on each supplier you want excluded from the report.

See page 7-15 for information on using the Show Data and Hide Data buttons.

See page 7-16 for information on previewing, printing, or creating a PDF of the Stock Status report.

Shipment Summary Report

The Shipment Summary report calculates the cost of products and freight for selected shipments. Data in this report can be displayed by supplier or product.

Shipment Summary by Supplier

This report groups shipments and subtotals costs by supplier. This is useful if you have products with multiple suppliers but you need to look at costs associated with individual suppliers. Use this report when you review shipment information with suppliers and estimating costs and budgeting.

Shipment Summary by Product

This report groups shipments by product, regardless of supplier. This is useful if you have products with multiple suppliers but you need to see costs associated with individual products. Use this report to review shipments input to PipeLine and to check their expected receipt dates, quantities, status, etc.

Creating a Shipment Summary Report

You can use PipeLine to create a Shipment Summary report (grouped by supplier or product).

From the Tree View—

1. Click on the Shipment Summary Tree View option to display the Shipment Summary report screen (see Figure 7-5).

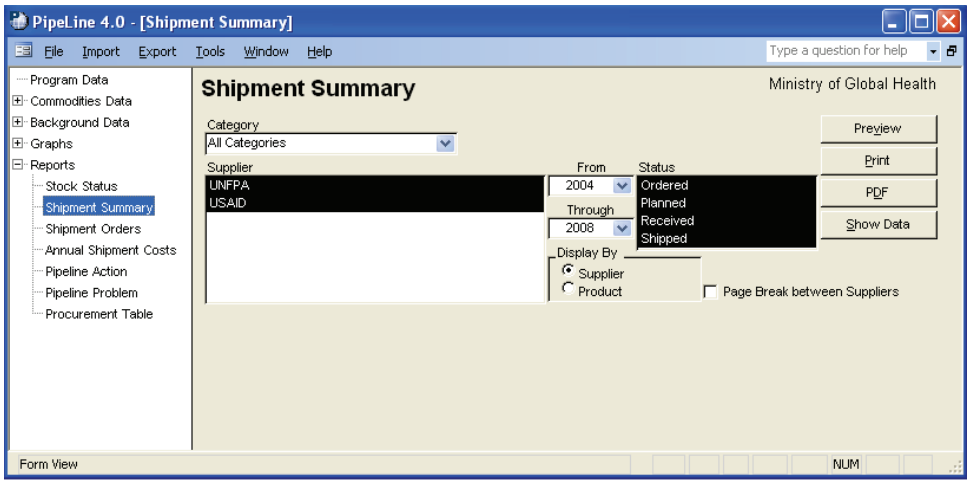


Figure 7-5—Shipment Summary screen

2. Click on the arrow next to the Category field, and select a category from the pull-down menu.

   Or, select All Categories from the Category pull-down menu to access all the products in your program.

By default, the Shipment Summary report is set for all suppliers, with all shipment status types pre-selected.

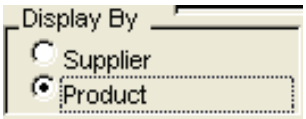


Figure 7-6—Display options

To create a report grouped by products—

3. Click on the Product field in the Display By area of the Shipment Summary report screen (see Figure 7-6) to create a report grouped by products.

Regardless of the type of report you choose to create, you can fine-tune the report.

4. For reports by supplier, click on the Page Break Between Suppliers field to include a page break after each supplier included in the report.

   Or, for reports by products, click on the Page Break Between Types field to include a page break after each Type included in the report.

Limiting the Report's Scope

You can limit the scope of the report.

To limit the number of suppliers or products included in the report—

5. For Suppliers, click on the supplier you want included in the report.

   Or, for Products, click on the product you want included in the report.

To select multiple suppliers or products—

6. Hold down the <Ctrl> key, and click on each supplier you want included in the report.

   Or, hold down the <Ctrl> key, and click on each product you want included in the report.

To limit the shipment statuses included in the report—

7. In the Status field, click on the status you want included in the report.

To select multiple statuses—

8. Hold down the <Ctrl> key, and click on each status you want included in the report.

The From and Through fields define the reporting period. By default, the reporting period begins on the year of your first shipment and ends on the year your last shipment was received, or is expected to be received.

To change the reporting period—

9. Click on the From field, and select the start year from the pull-down menu.
10. Click on the Through field, and select the end year from the pull-down menu.

See page 7-15 for information on using the Show Data and Hide Data buttons.

See page 7-16 for information on previewing, printing, or creating a PDF of the Shipment Summary report.

Shipment Orders Report

This report can be used as a draft order for new shipments, and it can be used to confirm information on previous shipments.

Creating a Shipment Orders Report

You can use PipeLine to create the Shipment Orders report.

From the Tree View—

1. Click on the Shipment Orders Tree View option.

The Shipment Orders report screen is displayed (see Figure 7-7).

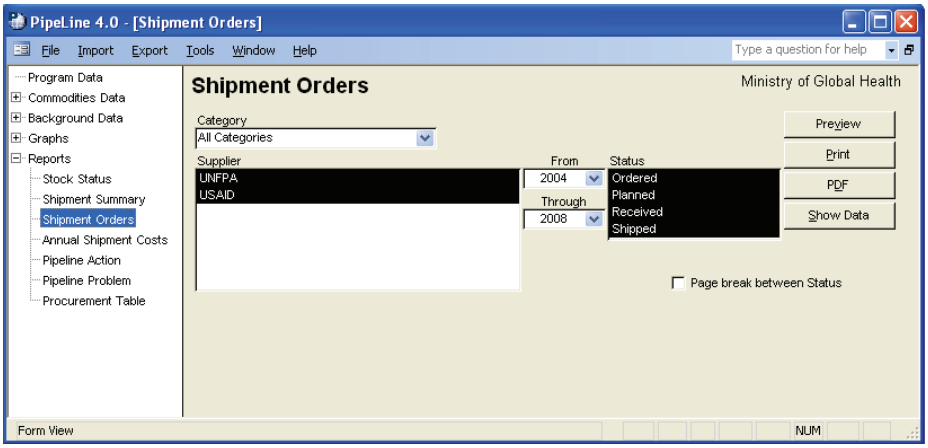


Figure 7-7—Shipment Orders screen

By default, the Shipment Orders report is set for all suppliers, with all shipment statuses selected.

To create a report for a specific supplier—

2. Click on the arrow next to the Category field, and select a category from the pull-down menu.

   Or, select All Categories from the Category pull-down menu to access all the products in your program.

3. In the Supplier field, click on the supplier you want included in the report.

To select multiple suppliers—

4. Hold down the <Ctrl> key, and click on each supplier you want included in the report.

To limit which shipment statuses are included in the report—

5. In the Status, click on the status you want included in the report.

To select multiple statuses—

6. Hold down the <Ctrl> key, and click on each status you need included in the report.

The From and Through fields define the reporting period. By default, the reporting period begins on the year of your first shipment and ends on the year your last shipment was received, or is expected to be received.

To change the reporting period—

7. Click on the From field, and select the start year from the pull-down menu.
8. Click on the Through field, and select the end year from the pull-down menu.

The Page Break between Status field enables you to include page breaks in the report.

9. Click on the Page Break Between Status field to include a page break after each shipment status included in the report.

See page 7-15 for information on using the Show Data and Hide Data buttons.

See page 7-16 for information on previewing, printing, or creating a PDF of the Shipment Order report.

Annual Shipment Costs Report

The Annual Shipment Cost report calculates annual shipment costs, by supplier. It calculates the total cost (product value and freight) of shipments received, or expected to be received, in a calendar year. It shows yearly totals, not the cost of individual shipments. Costs associated with the procurement and delivery of a shipment (e.g., taxes, customs clearance fees) should be included in the freight cost. Use this report when you talk to suppliers to help assess the annual costs of

supplying your program. If you procure your own commodities, this report may be helpful for budgeting.

Creating an Annual Shipment Costs Report

By default, the Annual Shipment Costs report is set for all suppliers, products, and shipment statuses.

From the Tree View—

1. Click on the Annual Shipment Costs Tree View option.

The Annual Shipment Costs screen is displayed (see Figure 7-8).

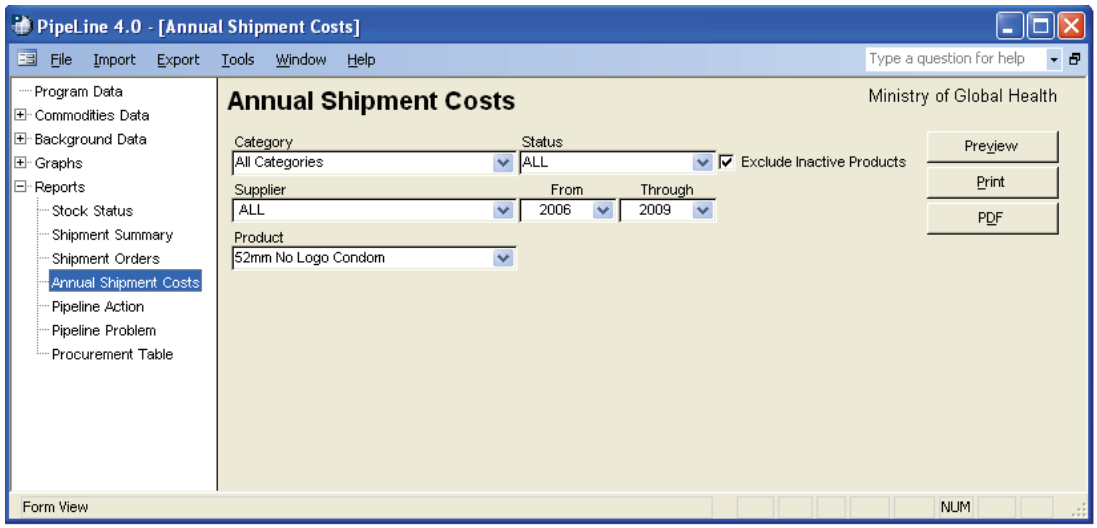


Figure 7-8—Annual Shipment Costs screen

Limiting the Report's Scope

You can limit the scope of the report.

2. Click on the arrow next to the Category field, and select a category from the pull-down menu.

   Or, select All Categories from the Category pull-down menu to access all the products in your program.

3. Click on the arrow next to the Supplier field, and select a supplier from the pull-down menu.

4. Click on the arrow next to the Product field, and select a product from the pull-down menu.

5. Click on the Exclude Inactive Products field to have the report list only those products that are currently active.

6. Click on the Status field, and select the shipment status you need.

	You may choose one or all items from the category, supplier, product, and status menus.

The From and Through fields show the reporting period. The default reporting period for an Annual Shipment Cost report is five years.

To change the reporting period—

7. Click on the arrow next to the From field, and from the pull-down menu, select the starting year of the report period.

8. Click on the arrow next to the Through field, and from the pull-down menu, select the last year of the report period.

See page 7-16 for information on previewing, printing, or creating a PDF of the Annual Shipment Costs report.

Pipeline Action Report

The Pipeline Action report creates a comprehensive analysis of product pipelines and information on needed actions. It shows the procurement actions needed next for the products you monitor, organized by the date of the action needed next. Possible actions include—

Plan Shipment

A shipment needs to arrive in the month specified to prevent stock levels from dropping below minimum and to bring them back to the maximum level. Based on lead times, this planning should be done no later than the action date. Before taking action, review the Stock Status report to determine the impact this will have on future stock status.

Confirm Shipment Ordered

A shipment planned to arrive on the receive date should be ordered no later than the action date. Ensure that the shipment was ordered. Update the status and date ordered on the Shipments form.

Confirm Shipment Dispatched

A shipment ordered to arrive on the receive date should be shipped no later than the action date. Ensure that the shipment was dispatched. Update the status and date shipped on the Shipments form.

Confirm Shipment Received

A shipment shipped to arrive on the receive date should be confirmed upon arrival. Ensure that the shipment was received. Update the status and date received on the Shipments form.

Surplus, Change

An arriving shipment will push stock levels above the maximum desired level. Determine if you should cancel or postpone the shipment, or transfer stock to another program. Update the PipeLine data accordingly.

Use this report to guide your pipeline monitoring activities. With good data, you can take each required action on or before the date the action is required to prevent stock imbalances before they occur. You should, however, review the Stock Status report and graph before taking procurement actions.

Creating a Pipeline Action Report

This report is generated based on all shipments and needed quantities for active products, and it is displayed on the screen. *Received* shipments are not included.

From the Tree View—

1. Click on the Pipeline Action Tree View option.

The Pipeline Action screen is displayed (see Figure 7-9).

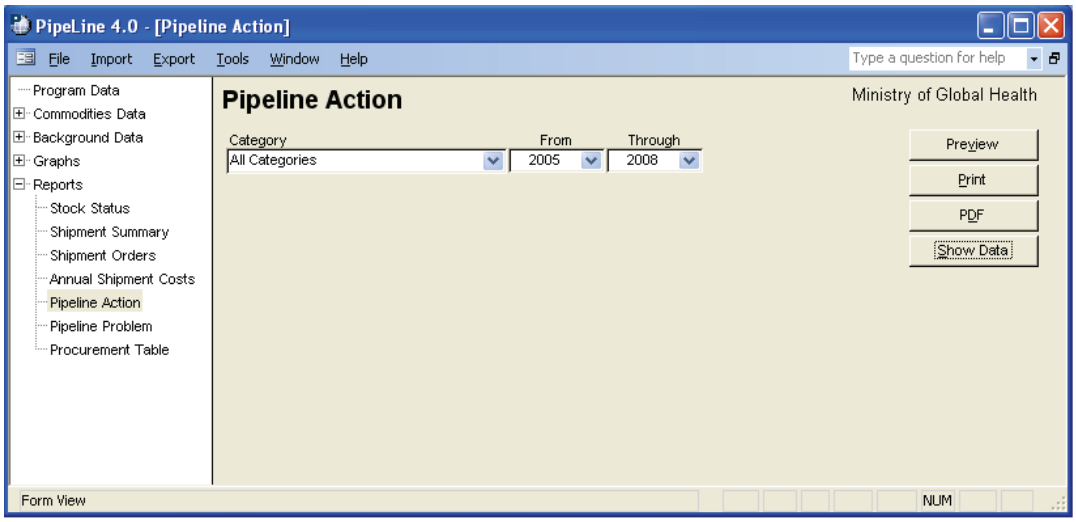


Figure 7-9—Pipeline Action screen

Limiting the Report's Scope

You can limit the scope of the report.

2. Click on the arrow next to the Category field, and select a category from the pull-down menu.

   Or, select All Categories from the Category pull-down menu to include all the products in your program.

The From and Through fields show the reporting period.

To change the reporting period—

3. Click on the arrow next to the From field, and, from the pull-down menu, select the starting year of the report period.
4. Click on the arrow next to the Through field, and, from the pull-down menu, select the last year of the report period.

See page 7-15 for information on using the Show Data and Hide Data buttons.

See page 7-16 for information on previewing, printing, or creating a PDF of the Pipeline Action report.

Pipeline Problem Report

The Pipeline Problem report summarizes pipeline problems that were observed in an analysis of active products. A problem is defined when the actual or expected ending stock balance falls below minimum, reaches zero, or rises above maximum on the problem date. This report highlights actual or expected serious pipeline problems for the products you track. It does not consider lead times, only the dates that problems will occur if actions are not taken. This report alerts you to the following problems:

Below Minimum

A product will fall below the desired minimum stock level before the date of the problem. The problem corresponds to an action to plan shipment in the Pipeline Action report.

Stock Out

A product's stock level will reach zero before the date of the problem if no procurement actions are taken, and the primary data entered for the product are accurate.

Above Maximum

A shipment arriving on the date of the problem will cause a product to be above the desired maximum stock level at the end of the month. The problem corresponds to the Surplus, Change action in the Pipeline Action report.

Use this report to identify problems that require urgent action. If the report shows many problems, you may need to review your maximum/minimum stock policies, lead time estimates, suppliers' performance, and amount of resources devoted to commodities. This report can help you negotiate with donors and suppliers to mitigate anticipated pipeline problems.

Creating the Pipeline Problem Report

The report is based on actual and expected stock levels for active products.

From the Tree View—

1. Click on the Pipeline Problem Tree View option.

The Pipeline Problem report screen is displayed (see Figure 7-10).

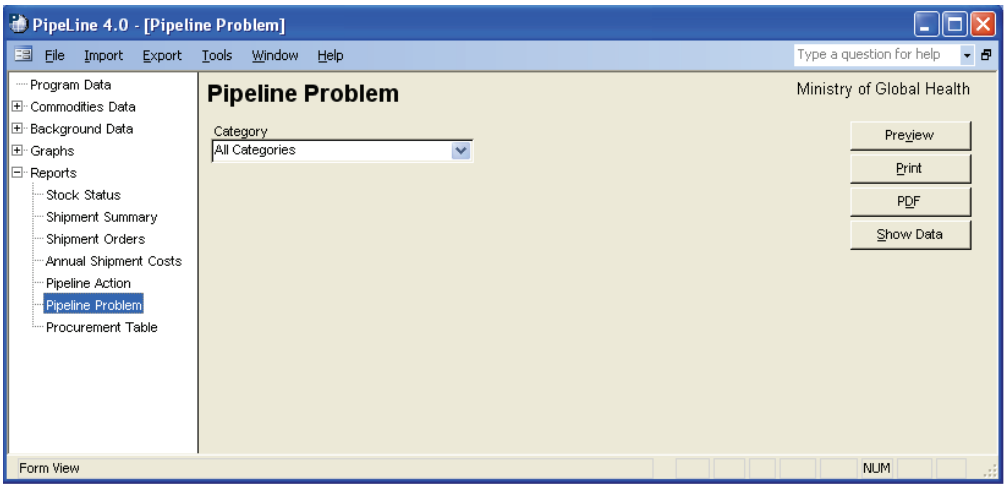


Figure 7-10—Pipeline Problem report screen

Limiting the Report's Scope

You can limit the scope of the report.

2. Click on the arrow next to the Category field, and select a category from the pull-down menu.

   Or, select All Categories from the Category pull-down menu to include all the products in your program.

See page 7-15 for information on using the Show Data and Hide Data buttons.

See page 7-16 for information on previewing, printing, or creating a PDF of the Pipeline Problem report.

Procurement Table Report

This report displays data in the USAID CPT calendar year format. It applies the same formulas to calculate desired end of year stock, net supply, and supply shortfall for the CPT year and the following year. See the *CPT Guidance Manual* (available from USAID) for information on how these calculations are made. Request the product from USAID with the support of this report. If USAID agrees to supply the product, plan your shipments so that the supply shortfall is near zero.

Use this report when you talk to contacts familiar with the CPT format. It can be used to complete manual CPTs requested in USAID's CPT Guidance as supporting documentation for USAID orders.

Creating a Procurement Table Report

The default period is five years, which includes the selected year, previous two years (historical), and following two years (forecast).

From the Tree View—

1. Click on the Procurement Table Tree View option.

The Procurement Table report screen is displayed (see Figure 7-11).

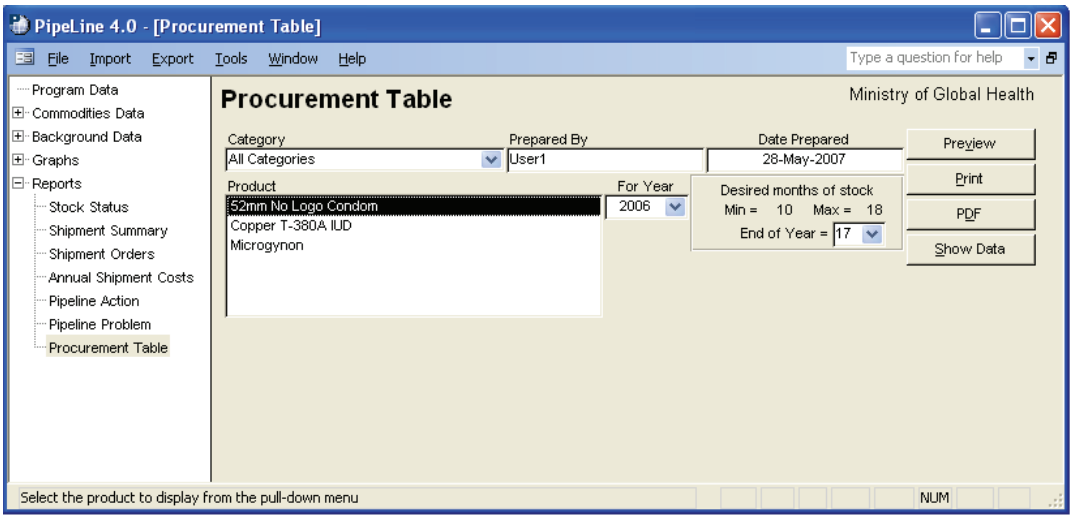


Figure 7-11—Procurement Table screen

Limiting the Report's Scope

You can limit the scope of the report.

To select a specific category—

2. Click on the arrow next to the Category field, and select a category from the pull-down menu.

   Or, select All Categories from the Category pull-down menu to include all the products in your program.

Products associated with the selected category are displayed in the Product box.

3. Click on the product you want included in the report.

   Or, hold down the <Ctrl> key, and click on each product you want included in the report.

The Prepared By field shows the username of the person preparing the report. By default, PipeLine displays the username of the person currently logged into the system. To change the username—

4. Highlight the entry in the Prepared By field, and type the name of the person preparing the report.

The Date Prepared field shows the date the report was prepared. By default, PipeLine displays the current system date. To change the entry—

5. Highlight the entry in the Date Prepared field, and type the date the report was prepared.

	Always use a four-digit year (for example, 2002, 2003, 2004, etc.).

The End of Year field (see Figure 7-12) enables you to determine how much stock you want to have on hand at the end of the year.

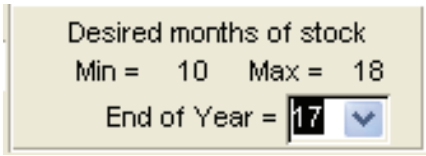


Figure 7-12—End of Year field

6. Click on the arrow next to the End of Year field, and select the desired months of stock from the pull-down menu.

The For Year field displays the reporting year.

7. Click on the arrow next to the For Year field, and select the desired CPT year from the pull-down menu.

See page 7-15 for information on using the Show Data and Hide Data buttons.

See page 7-16 for information on previewing, printing, or creating a PDF of the Procurement Table report.

Showing and Hiding Report Data

With the exception of the Annual Shipment Costs report, PipeLine report screens have a Show Data button that enables you to quickly view a sampling of the data to be included in a given report. This feature only works when one data set (product, type, supplier, etc.) is selected for a given category.

Showing Report Data

To use the Show Data feature—

1. Select the criteria for a report based on the report's instructions.
2. Click on the Show Data button.

Data associated with the selected report are displayed on a screen similar to Figure 7-13. This example represents data generated by the Shipment Summary report.

Supplier	Product	Receive Date	ID	Quantity	Status	----------Costs---- Product	Freight
UNFPA	Microgynon	15-Jun-04	Xrq56	12,000	Received	2,640	317
UNFPA	Microgynon	28-Feb-05	Xrq39	9,600	Received	2,112	253
UNFPA	Microgynon	15-Jan-06	Xrq91	4,800	Received	1,056	127
UNFPA	Microgynon	15-Jun-06	Xrq12	2,400	Ordered	528	63
UNFPA	Microgynon	01-Sep-06	20	7,200	Planned	1,584	190
UNFPA	Microgynon	28-Mar-07	21	9,600	Planned	2,112	253
USAID	Copper T-380A IUD	30-Mar-04	9684/1	1,600	Received	2,623	315
USAID	Copper T-380A IUD	15-Jun-04	9684/2	1,600	Received	2,623	315
USAID	Copper T-380A IUD	03-Mar-06	13022/1	2,200	Shipped	3,416	410
USAID	Copper T-380A IUD	01-Sep-06	28	1,600	Planned	2,484	298
USAID	52mm No Logo Condo	30-Mar-04	9685/1	336,000	Received	16,632	1,996
USAID	52mm No Logo Condo	15-Jun-04	9685/2	336,000	Received	16,632	1,996
USAID	52mm No Logo Condo	15-Dec-04	10105/2	336,000	Received	16,632	1,996
USAID	52mm No Logo Condo	31-Mar-05	10105/1	336,000	Received	16,632	1,996
USAID	52mm No Logo Condo	30-Sep-05	11703/1	648,000	Received	32,076	3,849

Figure 7-13—Example of Show Data display

Use the Scroll bar (if needed) to view all the generated data.

Hiding Report Data

The Hide Data button becomes active when report data is displayed on a given report form.

To hide the report data—

1. Click on the Hide Data button.

Previewing and Printing PipeLine Reports

The procedure for previewing and printing PipeLine reports is the same for all types of reports.

Previewing a Report

To preview a report—

1. Click on the Preview button.

The report is displayed onscreen. If you are satisfied with the data as presented, you can print the report from the preview screen.

2. Click on the print icon to send the report to your default printer.

3. Click on the close icon to return to the previous screen.

Office Links

The PipeLine Report Viewer Menu has a feature that enables you to export a displayed report to one or more of the programs associated with Microsoft Office. This feature is called Office Links.

	You must have Microsoft Office 2000 or above installed on your computer to use the Office Links feature.

To use the Office Links feature—

1. Select the report criteria, and click on the Preview button.

2. Click on the Office Links option of the Tool Bar to display the Office Links pull-down menu.

3. Select the file format you want to export to from the pull-down menu.

PipeLine prompts you to name the export file.

4. Type the export file's name in the name field, and click on the OK button.

PipeLine opens the Microsoft Office product associated with the file type where you exported the report.

Printing a Report

You can send a report directly to your default printer, without previewing it.

1. Click on the Print button.

Creating a PDF of a Report

To create a PDF of a report without previewing it—

1. Click on the PDF button.

To create a PDF of a report from the preview of the report —

2. Click on the Preview button.

3. Click on the Office Links option of the Tool Bar to display the Office Links pull-down menu.
4. Click on the Send to PDF menu option to create a PDF of the report.

! !	To create a PDF, you must first choose a PDF writer. For more information on choosing a PDF writer, see page A-16.

8 PIPELINE SUMMARY

Introduction

This option (only available in English) is intended for program managers and/or consultants who are responsible for managing multiple programs tracked by PipeLine. It aggregates PipeLine data from selected programs, and arranges the data so it can be presented in a selected graph or report.

The following graphs and reports are available:

Shipments by Supplier Report

This report is similar to the PipeLine Shipment Summary report. It displays shipment costs, including product and freight costs, for selected supplier/status of selected, aggregated programs.

Shipment Orders Report

This report is similar to the PipeLine Shipment Orders report. It displays quantities and cost of orders for a selected supplier/status of selected, aggregated programs.

Consumption Graph/Export

This graph is similar to the PipeLine Consumption graph. It produces a monthly or quarterly bar chart showing actual and forecast consumption by product or method of selected, aggregated programs. This option enables you export aggregated data.

Couple-Years of Protection (CYP) Graph

This graph is similar to the PipeLine couple-years of protection (CYP) graph. It produces a monthly or quarterly bar chart showing actual and forecast CYP by product or method of selected, aggregated programs.

Access the PipeLine Summary Module

The PipeLine Summary Module is accessed through PipeLine.

From the Menu Bar—

1. Click on the Tools option of the Menu Bar to display the Tools pull-down menu.
2. Click on the PipeLine Summary pull-down menu option to display the PipeLine Summary menu screen.

Selecting Programs

The Select Programs option enables you select the program(s) to aggregate. You must select a program or programs for aggregation before you create reports or graphs.

From the PipeLine Summary Menu—

1. Click on the Select Programs button.

PipeLine displays the Select Program screen (see Figure 8-1).

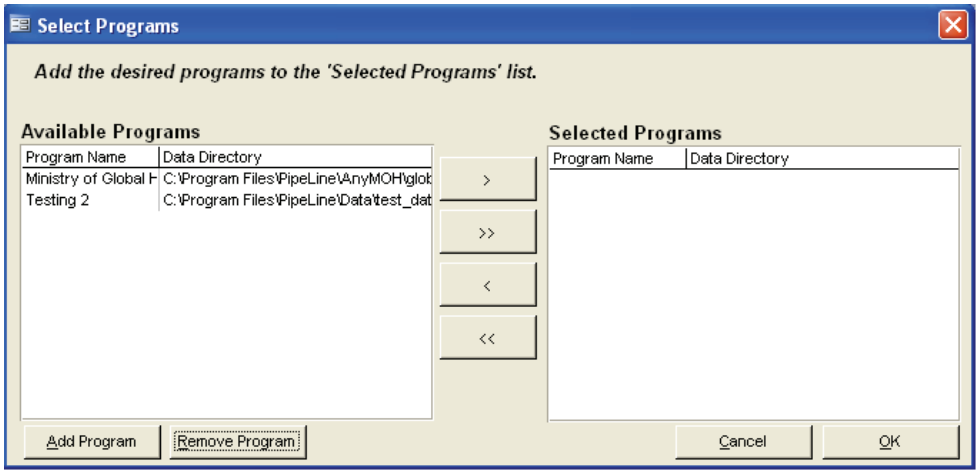


Figure 8-1—Select Programs screen

If the program (or programs) you need to aggregate does not appear on the list of available programs, you can add them.

Adding Programs

Use the Add Program button to add programs for selection and aggregation.

1. Click on the Add Programs button.

PipeLine displays the Load Database window.

2. Locate the data file corresponding to the program you want to add.

3. Click on the program you need, then click on the Open button.

PipeLine displays a window similar to Figure 8-2 to enable you to associate an eight-character ID with the selected program.'

4. Type the program's eight-character ID.

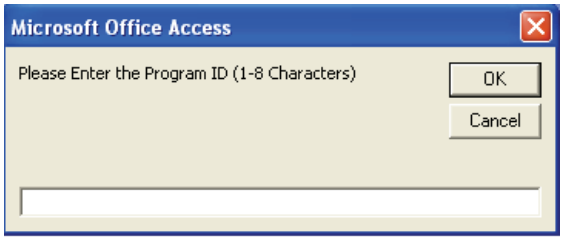


Figure 8-2—Program ID window

5. Click on the OK button to save the ID, and close the Program ID window.

The selected program is displayed in the Available Programs window on the Select Program screen.

6. Repeat the process until you have added all the programs you need.

After your list is complete, you must select the programs you need to aggregate for reporting. This can be done in two ways:

7. Click on the Select All button to move the programs in the Available Programs window to the Selected Programs window.

   Or, click on the program you need, and click on the Select button to move it from the Available Programs window to the Selected Program window.

8. Repeat, as needed.

After you select the programs you need—

9. Click on the OK button to aggregate the data and return to the PipeLine Summary menu.

	If you make changes to a program's data in PipeLine, you must reload the program into PipeLine Summary to ensure that the changes are reflected in the summary reports and graphs. To do this, reselect the program and regenerate the aggregated PipeLine Summary to reflect the changes you made.

Creating Reports and Graphs

PipeLine can create summary reports and graphs.

Shipment Costs by Supplier Report

The Shipment Costs by Supplier report groups shipment quantities and costs by supplier, method, product, program, and status.

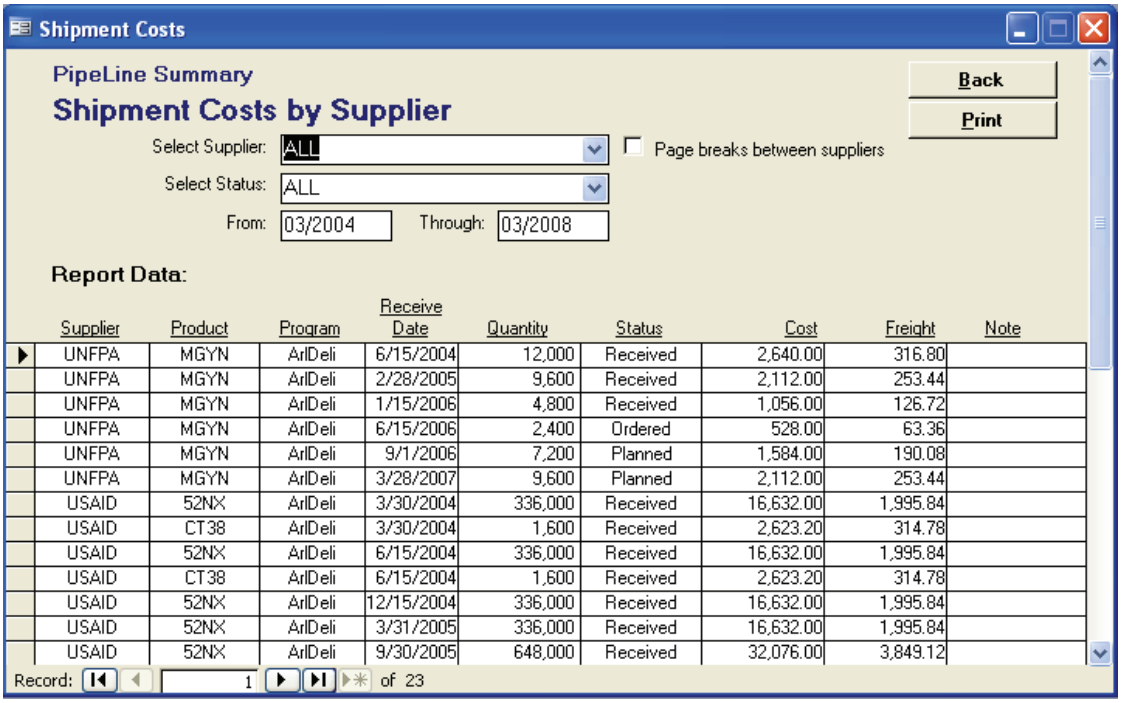
This is useful if you have shipments going to multiple programs from the same supplier and you need to look at total shipments and associated costs for each supplier.

Use this report to review shipment information (including schedules and budgets) for a selected set of programs.

From the PipeLine Summary Menu—

1. Click on the Shipments by Supplier Report button.

PipeLine displays shipments and their associated costs. Figure 8-3 shows the Shipment Costs by Supplier screen, which is displayed after the report is created. Use this screen to create shipment cost reports for other suppliers.



Supplier	Product	Program	Receive Date	Quantity	Status	Cost	Freight	Note
UNFPA	MGYN	ArlDeli	6/15/2004	12,000	Received	2,640.00	316.80	
UNFPA	MGYN	ArlDeli	2/28/2005	9,600	Received	2,112.00	253.44	
UNFPA	MGYN	ArlDeli	1/15/2006	4,800	Received	1,056.00	126.72	
UNFPA	MGYN	ArlDeli	6/15/2006	2,400	Ordered	528.00	63.36	
UNFPA	MGYN	ArlDeli	9/1/2006	7,200	Planned	1,584.00	190.08	
UNFPA	MGYN	ArlDeli	3/28/2007	9,600	Planned	2,112.00	253.44	
USAID	52NX	ArlDeli	3/30/2004	336,000	Received	16,632.00	1,995.84	
USAID	CT38	ArlDeli	3/30/2004	1,600	Received	2,623.20	314.78	
USAID	52NX	ArlDeli	6/15/2004	336,000	Received	16,632.00	1,995.84	
USAID	CT38	ArlDeli	6/15/2004	1,600	Received	2,623.20	314.78	
USAID	52NX	ArlDeli	12/15/2004	336,000	Received	16,632.00	1,995.84	
USAID	52NX	ArlDeli	3/31/2005	336,000	Received	16,632.00	1,995.84	
USAID	52NX	ArlDeli	9/30/2005	648,000	Received	32,076.00	3,849.12	

Figure 8-3—PipeLine Summary Shipment Costs by Supplier screen

By default, the Shipment Costs by Supplier report is set for all products and all shipment statuses, with a reporting period of five years. To limit the report's scope—

2. Click on the arrow next to the Select Supplier field, and select a supplier from the pull-down menu.

3. Click on the Select Status field and select the shipment status you want.

4. Click on the From field, and type the beginning date of the report.

5. Click on the Through field, and type the ending date of the report.

	Always enter a four-digit year (e.g., 2003, 2004, 2005, etc.).

The Page Breaks Between Suppliers fields enable you to include page breaks between suppliers listed in the report (when the report is generated for more than one supplier).

6. Click on the Page Breaks Between Suppliers field to include page breaks between suppliers.

See page 8-11 for information on printing the Shipment Costs by Supplier report.

Shipment Order Report

The Shipment Order report groups shipments by status, supplier, method, and product. Shipments with status *planned* are grouped under "New shipments requested this order." Shipments with status *shipped* or status *ordered* are grouped under "Confirmation of shipments previously ordered and expected." Shipments with status *received* are grouped under "Shipments received (in report range)."

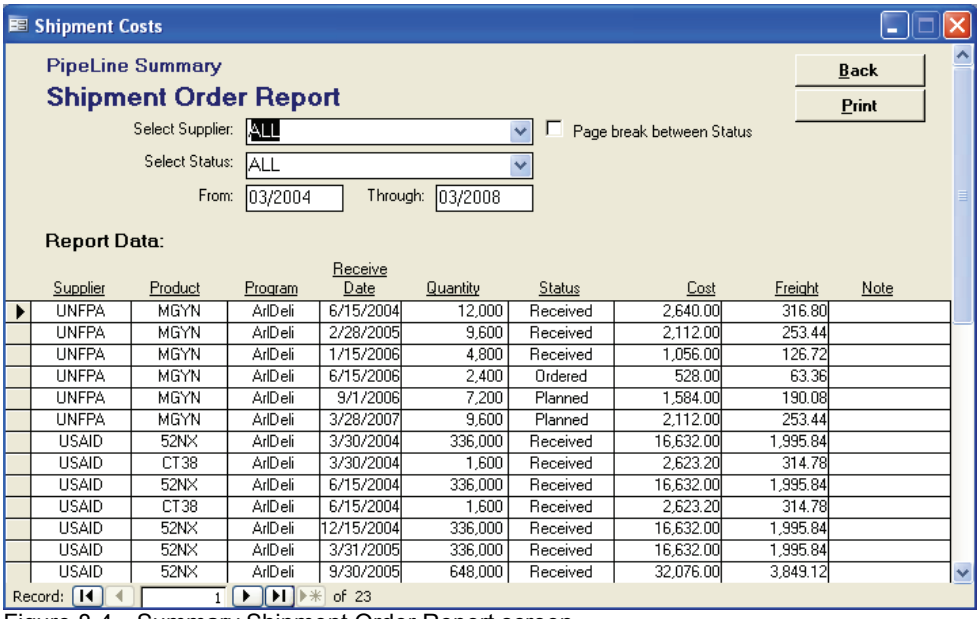
This is useful if you have shipments to multiple programs and you need to look at which shipments need to be ordered or confirmed with the suppliers or donors.

Use this report to review shipment status information (including schedules and costs) for a selected set of programs. Select a single supplier. Present this report to that supplier to order planned shipments, confirm previously ordered shipments, and confirm receipt of shipments received from the supplier during the report period.

From the PipeLine Summary Menu—

1. Click on the Shipment Order Report button.

PipeLine displays orders and associated data for the selected programs. Figure 8-4 shows a sample of the Shipment Order report screen. By default, the Shipment Order report is set for all products and all shipment statuses with a five-year reporting period.



Supplier	Product	Program	Receive Date	Quantity	Status	Cost	Freight	Note
UNFPA	MGYN	ArlDeli	6/15/2004	12,000	Received	2,640.00	316.80	
UNFPA	MGYN	ArlDeli	2/28/2005	9,600	Received	2,112.00	253.44	
UNFPA	MGYN	ArlDeli	1/15/2006	4,800	Received	1,056.00	126.72	
UNFPA	MGYN	ArlDeli	6/15/2006	2,400	Ordered	528.00	63.36	
UNFPA	MGYN	ArlDeli	9/1/2006	7,200	Planned	1,584.00	190.08	
UNFPA	MGYN	ArlDeli	3/28/2007	9,600	Planned	2,112.00	253.44	
USAID	52NX	ArlDeli	3/30/2004	336,000	Received	16,632.00	1,995.84	
USAID	CT38	ArlDeli	3/30/2004	1,600	Received	2,623.20	314.78	
USAID	52NX	ArlDeli	6/15/2004	336,000	Received	16,632.00	1,995.84	
USAID	CT38	ArlDeli	6/15/2004	1,600	Received	2,623.20	314.78	
USAID	52NX	ArlDeli	12/15/2004	336,000	Received	16,632.00	1,995.84	
USAID	52NX	ArlDeli	3/31/2005	336,000	Received	16,632.00	1,995.84	
USAID	52NX	ArlDeli	9/30/2005	648,000	Received	32,076.00	3,849.12	

Figure 8-4—Summary Shipment Order Report screen

To limit the report's scope—

2. Click on the arrow next to the Select Supplier field, and select a supplier from the pull-down menu.
3. Click on the Select Status field, and select the shipment status you need.
4. Click on the From field, and type the beginning date of the report.
5. Click on the Through field, and type the ending date of the report.

	Always enter a four-digit year (e.g., 2003, 2004, 2005, etc.).

The Page Breaks Between Status fields enable you to include page breaks between the shipment statuses listed in the report (when the report is generated for more than one shipment status).

6. Click on the Page Breaks Between Status field to include page breaks between shipment statuses.

See page 8-11 for information on printing the Shipment Order report.

Consumption Graph/Export

The Consumption graph groups consumption data by product ID or method ID.

Use this graph to compare relative shares and trends of distribution by product or method for multiple programs.

If you choose Method, the colors and legend will indicate what products and what programs are represented by each Method ID bar. If you choose Method and Program Detail, you will see the relative shares of each program, but not the product.

This is useful when programs use different but comparable products, so the method distinction is more useful than the product distinction.

From the PipeLine Summary Menu—

1. Click on the Consumption Graph/Export button.

The graph is based on the last product/method and period updated or displayed. Figure 8-5 shows the Consumption Graph screen, which is displayed after the graph is created. Use this screen to create graphs for other products/methods.

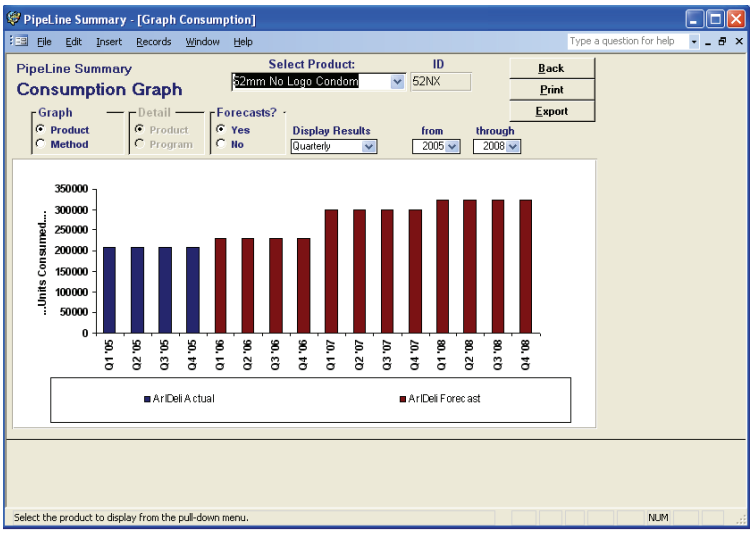


Figure 8-5—PipeLine Summary Consumption Graph screen

Graph Type

This section of the screen enables you to determine the type of graph you will produce. Your options are Product or Method.

2. To create a graph by product, click on the arrow next to the Select Product field, and select a product from the pull-down menu.

   Or, click on the Method field (under Graph, see Figure 8-6). Click on the arrow next to the Select Method field, and select a method from the pull-down menu to create a graph by method.

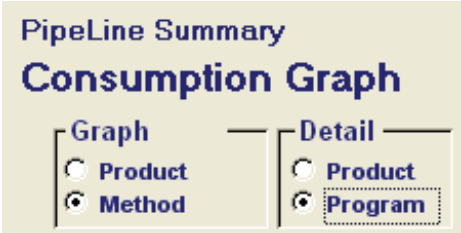


Figure 8-6—Graph options

When you create a consumption graph by method, the Detail section of the Consumption Graph screen becomes active (see Figure 8-6). Product is selected by default, enabling you to create a graph for products associated with a selected method.

To create a graph for all products of a particular method through an aggregation of programs—

3. Click on the Program field (under Detail, see Figure 8-6).
4. Click on the arrow next to the Select Method field, and select a method from the pull-down menu.

Regardless of the type of graph you choose, select the remaining options.

By default, the graph includes consumption forecasts. To create a graph that excludes forecast data—

5. Click on the No field (see Figure 8-7).
6. Click on the arrow next to the Display Results field, and select Monthly to display the data by month, or Quarterly to display the data by quarter.

Figure 8-7—Forecast options

The default reporting period is five years (the previous two years, current year, and following two years). To change the default reporting period—

7. Click on the arrow next to the From field, and select the starting year of the report period.
8. Click on the arrow next to the Through field, and select the last year of the report period.

See page 8-11 for information on printing the Consumption graph.

Exporting Summary Consumption Graph Data

Summary Consumption graph data can be exported for use with Microsoft Excel or other analysis software. After you create a consumption graph for a product or method—

1. Click on the Export button.

PipeLine displays the Output window (see Figure 8-8).

2. Click on the file type for the export data.
3. Click on the OK button.

PipeLine opens another Output window, so you can name and save the export file.

4. Click on the OK button.

   Or, click on the File Name field, and type the new export file name.

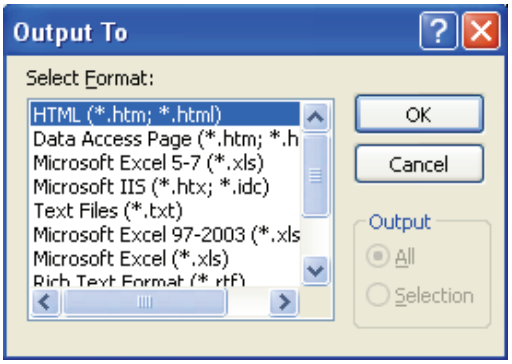


Figure 8-8—Output window

5. Click on the OK button to export and save the Consumption graph.
6. Click on the Back button to return to the PipeLine Summary menu.

Couple-Years of Protection (CYP) Graph

The CYP Graph converts consumption data by the CYP factor associated with a method.

Use this graph to measure and compare the extent of coverage provided by product or method across programs. The CYP factor is based on the percentage of one year where one unit of the method would provide one couple with contraception, if used properly.

You can compare coverage achievement over time between programs despite differences in method mix. A social marketing program may distribute more units and more volume and, perhaps, more value with methods like condoms and orals. But, a CYP analysis may indicate that a clinic NGO or MOH program may achieve more coverage because of the greater CYP factors of long-term methods such as Norplant, Depo-Provera, and IUDs.

Use this graph to evaluate and monitor relative program coverage or national coverage and achievement.

Creating the CYP Graph

Create the CYP graph as follows.

From the PipeLine Summary Menu—

1. Click on the Couple-Years of Protection (CYP) Graph button.

Figure 8-9 is a sample PipeLine Summary CYP graph screen.

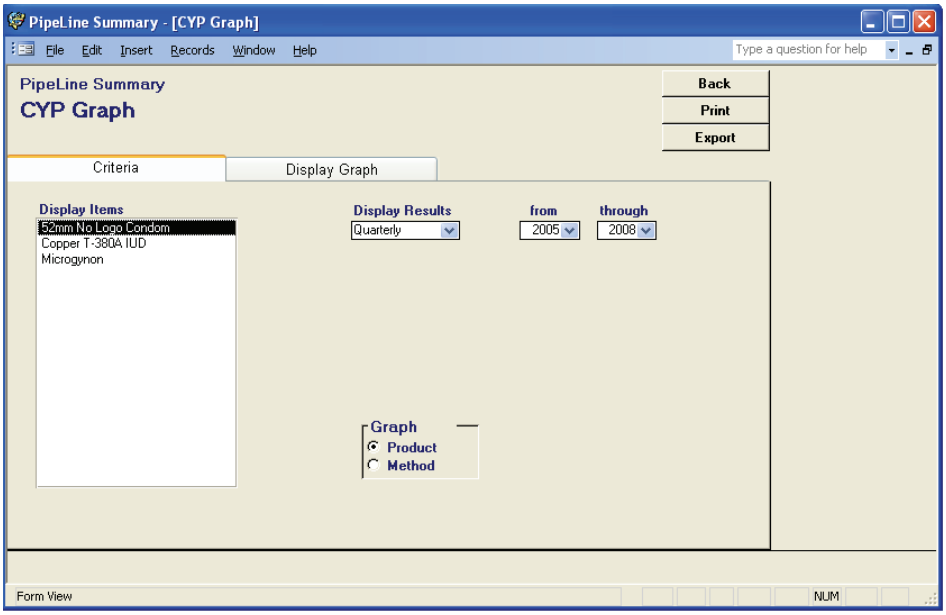


Figure 8-9—PipeLine Summary CYP graph screen

The Display Items field shows the products or contraceptive methods that can be included in the graph.

2. Click on the Method option (Under Graph, see Figure 8-10) to create a graph by method.

   Or click on the Product option (Under Graph, see Figure 8-10) to create a graph by product.

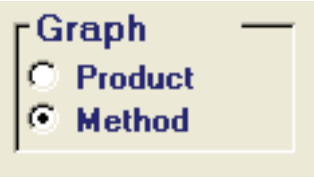


Figure 8-10—Graph type selection

   After you set the graph for products or methods—

3. Click on the product (or method) you want to include.

To select multiple products (or methods)—

4. Hold down the Control key (<Ctrl>) and click on each product or method you want to include.
5. Click on the arrow next to the Display Results field, and select Monthly to display the data by month or Quarterly to display the data by quarter.
6. Click on the arrow next to the From field, and select the starting year of the report period from the pull-down menu.
7. Click on the arrow next to the Through field, and select the last year of the report period from the pull-down menu.

Displaying the Summary CYP Graph

Use the Display Graph tab to preview the CYP graph before printing it.

1. Click on the Display Graph tab.

The CYP graph is created and displayed (see Figure 8-11).

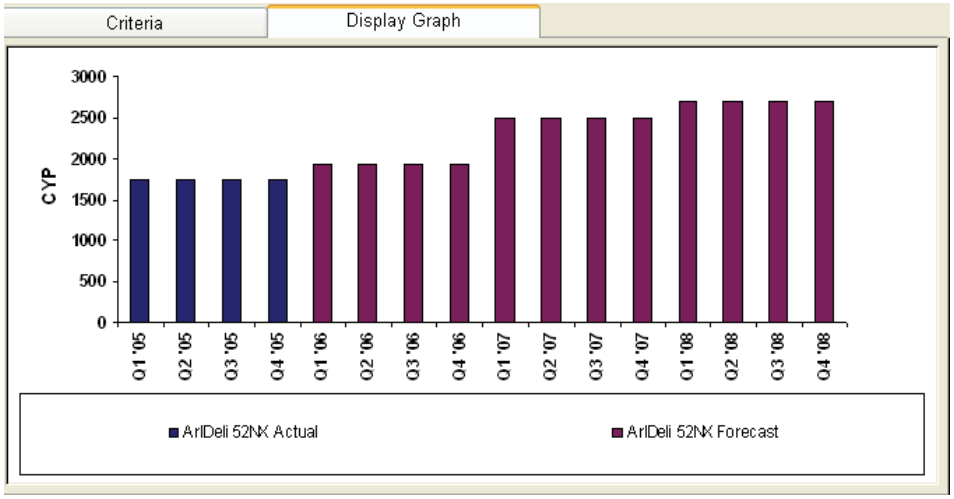


Figure 8-11—CYP Graph display

See page 8-11 for information on printing the PipeLine Summary CYP graph.

Exporting the CYP Graph

The Export button enables you to export the data of a completed PipeLine Summary CYP graph. After you create a CYP graph, you can export the data as follows—

1. Click on the Export button.

PipeLine displays the Export CYP Data window (see Figure 8-12). Use the options in this window to arrange the data in a Microsoft Office Excel spreadsheet.

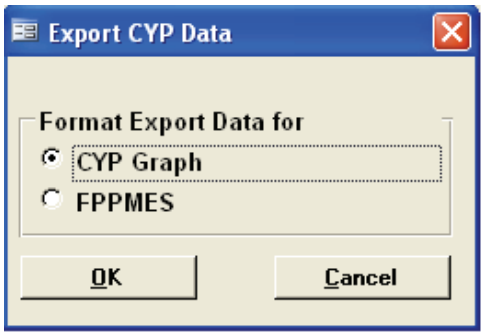


Figure 8-12—Export CYP Data window

CYP Graph

Incorporates the CYP factors into the consumption totals for ad hoc reports and graphs.

FPPMES

Arranges the data for the Family Planning Program Monitoring and Evaluation System.

The default is CYP Graph.

2. Click on the OK button to accept the default.

   Or, click on FPPMES, and click on the OK button.

PipeLine opens another Output window where you can name and save the export file. The default export file name is shown in the File Name field.

3. Click on the OK button to accept the default.

   Or, click on the File Name field, and type the new export file name.

4. Click on the OK button to export, and save the Consumption graph.

5. Click on the Back button to return to the PipeLine Summary menu.

Previewing and Printing a Report or Graph

The procedure for printing a PipeLine Summary report or graph is the same regardless of the type you choose. To print a completed report or graph—

1. Click on the Print button to display the report or graph on your screen.

2. Click on the print icon to send the report or graph to your default printer.

3. Click on the close icon  to return to the previous screen.
4. Click on the Back button to return to the PipeLine Summary menu.

APPENDIX A PIPELINE UTILITIES

Introduction

PipeLine's collection of utilities can be accessed from the Menu Bar. These utilities give you access to features that can enhance PipeLine's usefulness. Sample Figure A-1 shows the PipeLine Menu Bar.

Figure A-1—PipeLine Menu Bar

PipeLine's File Utilities

The File option of the PipeLine Menu Bar enables you to add, open, copy, and close program data files. It also enables you to display the properties of the current program and to exit PipeLine.

The first four options of the File option's drop-down menu (New, Open, Copy, and Close) are explained in section 3 of this guide.

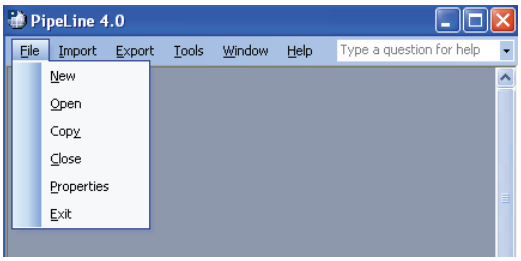


Figure A-2—File options

Program Properties

The Properties option displays basic information about the program file you are currently using.

To display the properties of the current program—

1. Click on the File Menu Bar option.
2. Click on the Properties option.

PipeLine displays the Properties window (see Figure A-3).

3. Click on the Close button to close the Properties window.

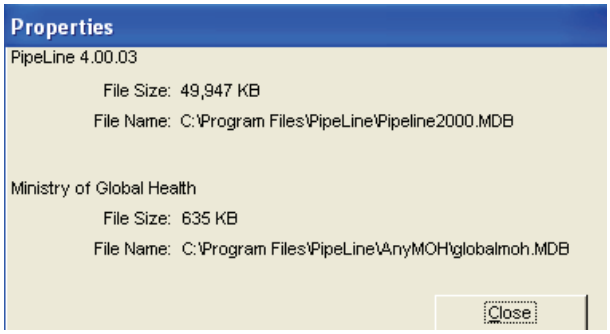


Figure A-3—Program properties

Exiting PipeLine

You can exit PipeLine at any time.

To exit PipeLine—

1. Click on the File Menu Bar option.
2. Click on the Exit option.

PipeLine's Import Utilities

The Import option of the Menu Bar enables you to import product, consumption, and shipment data.

Importing Product Data

PipeLine allows you to either import new product data or update product data previously imported. Figure A-4 shows the selections available through the drop-down menu.

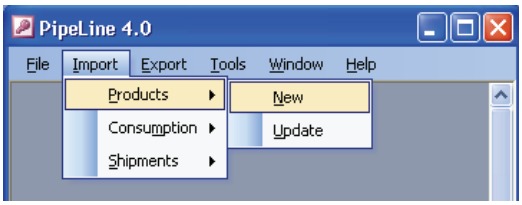


Figure A-4—Import Product options

Import New Product Data

To import new products generated by other procurement systems.—

1. Click on the Import Menu Bar option.
2. Click on the Product option.
3. Click on the New option.

The Import Product List window is displayed (see Figure A-5—Import Product List window).

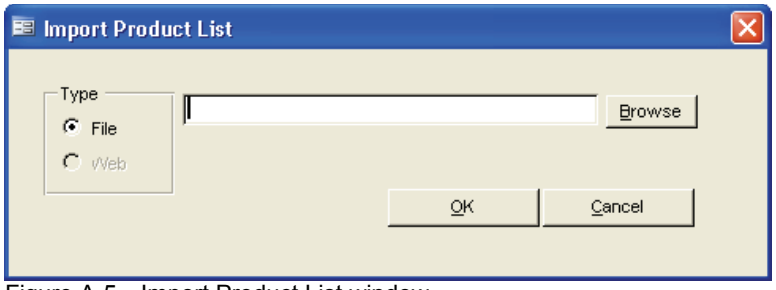


Figure A-5—Import Product List window

! !	Inside the Type box, be sure that the File radio button is selected. The functionality for the Web option is currently not available.

4. Type the location of the product file you need to import, and click on the OK button.

	If you are not sure where the file is located, use the Browse button. Click on the Browse button, and use Windows Explorer to locate the file you need. Click on the file, and Click Open.

PipeLine displays a warning message if the XML file is not valid for this Country Program.

WARNING!!	Never import a file from the A:\ drive. Move the data from the A:\ drive to your hard disk, then use the Import Option to select the data.

After validating the file, PipeLine displays the Product Import Reconciliation window (see Figure A-6).

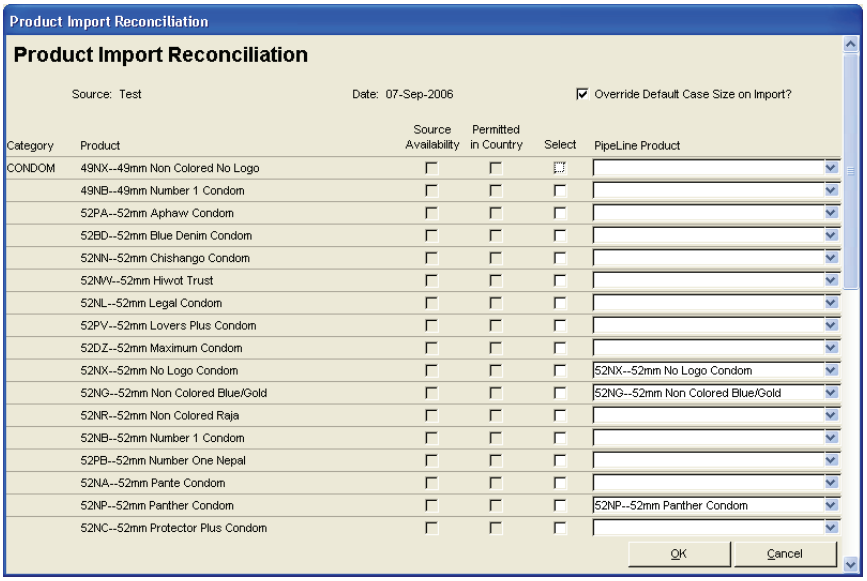


Figure A-6—Product Import Reconciliation window

Reconciling Imported Product Data

The Product Import Reconciliation screen shows a list of all potential products to be imported. The Source field is filled with the source of the import data.

For example: If the data was imported from SCMS, the name is displayed in the Source field in the Product Import Reconciliation window (see Figure A-6).

The Date field contains the date the import file was created. The Override Default Case Size on Import? field identifies if the import values will overwrite the default case size in the database.

5. Deselect "Override Default Case Size in import?" if you do not want the default Case Size overwritten with what is in the import file.

The Category column displays the category for the product in the import file, and the Product column displays the Product Code and Product Name for the product values in the import file. The next two columns are marked with a check only if a particular product in the import file is available from the source of the import file and if it is permitted in the country. The final two columns are used to select a product to be imported, and to map products to existing PipeLine products, if necessary.

	Products that are available from the source and are permitted in the country will automatically be selected for import. Also, all products with a code that matches a PipeLine product will automatically be mapped; the mapping cannot be modified.

To select a product for import—

6. Click on the Select column for each product you would like to import into PipeLine.

To associate a product being imported with existing PipeLine products—

7. Click on the arrow next to a blank data field, and select the PipeLine product that corresponds to the imported product.
8. Repeat the process for each product that needs to be associated with an existing PipeLine product.

WARNING!!	Mapping a new product to an existing PipeLine product will not import it. You must also check the Select column in the new product's row.

After you select the products to be imported and associate the product where applicable—

9. Click on the OK button to complete the import.

After the selected products are imported into PipeLine, the Import Report will be displayed. This report shows all the products that were imported, and also lists any errors for the products that were selected but not imported. Using the toolbar, you can export the report to Word, Excel, or PDF.

! !	The system does not save these reports, so is strongly recommended that you either export or print the report (before closing it).

After the report is closed, you will return to the main screen and will be able to view the newly imported products in the Product form.

Update Product Data

To update information, including cost data, for products previously imported from other procurement systems.—

1. Click on the Import Menu Bar option.
2. Click on the Product option.
3. Click on the Update option.

The Update Product List window is displayed (see Figure A-7).

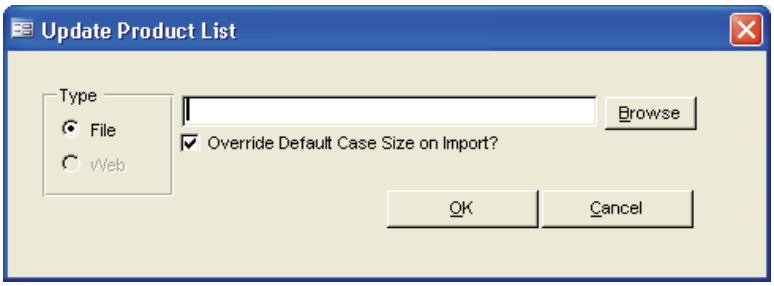


Figure A-7—Update Product List window

! !	Inside the Type box, be sure that the File radio button is selected. The functionality for the Web option is currently not available.

4. Type the location of the product file you need to import, and click on the OK button.

If you are not sure where the file is located, use the Browse button. Click on the Browse button, and use Windows Explorer to locate the file you need. Click on the file, and click Open.

5. Deselect “Override Default Case Size in import?” if you do not want the default Case Size overwritten with what is in the import file.

PipeLine displays a warning message if the XML file is not valid for this Country Program.

WARNING!!	Never import a file from the A:\ drive. Move the data from the A:\ drive to your hard disk, then use the Import Option to select the data.

PipeLine will automatically update information for all corresponding products. After the products are updated into PipeLine, the Import Report will be displayed. This report shows all the products that were updated. Using the toolbar, you can export the report to Word, Excel, or PDF.

! !	The system does not save these reports, so is strongly recommended that you either export or print the report (before closing it).

After the report is closed, you will return to the main screen, and will be able to view the newly updated products in the Product form.

Importing Consumption Data

PipeLine enables you to import forecast and actual consumption data generated by other logistics management systems (see Figure A-8).

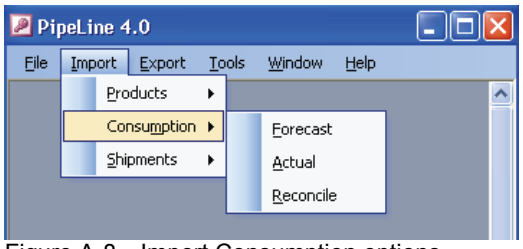


Figure A-8—Import Consumption options

Import Forecast Consumption Data

To import forecast consumption data.—

1. Click on the Import Menu Bar option.
2. Click on the Consumption option.
3. Click on the Forecast option.

PipeLine displays the Import Forecast Data window so you can select the data files to import (see Figure A-9).

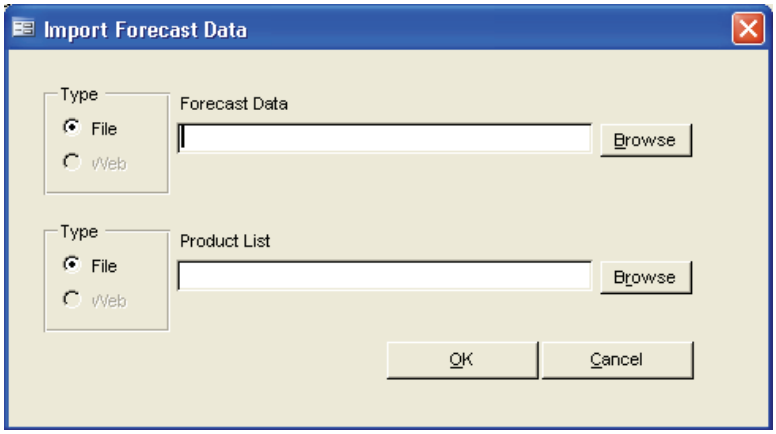


Figure A-9—Import Forecast Data window

! !	Inside both Type boxes be sure that the File radio button is selected. The functionality for the Web option is currently not available.

4. Type the location of the Forecast Data file you need to import.

> If you are not sure where the forecast data file is located, use the Browse button. Click on the Browse button, and use Windows Explorer to locate the file you need. Click on the file and click Open.

5. Type the location of the Product List file you need to import.

> If you are not sure where the product list file is located, use the Browse button. Click on the Browse button, and use Windows Explorer to locate the file you need. Click on the file and click Open.

6. Click OK.

PipeLine displays a warning message if the XML files are not valid for this Country Program.

WARNING!!	Never import a file from the A:\ drive. Move the data from the A:\ drive to your hard disk, then use the Import Option to select the data.

After validating the file, PipeLine displays the Forecast Data Import Reconciliation window (see Figure A-10).

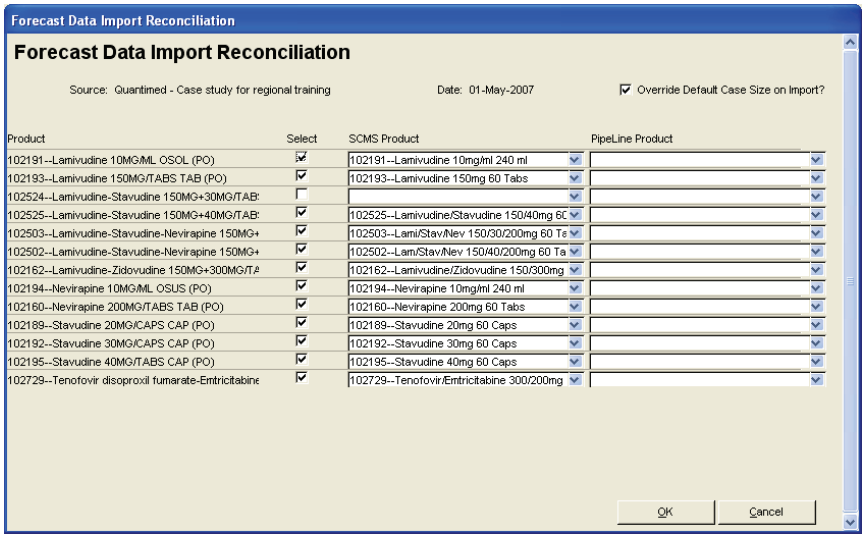


Figure A-10—Forecast Data Import Reconciliation window

Reconciling Imported Forecast Consumption Data

The Forecast Data Import Reconciliation screen shows a list of all potential forecast data and products to be imported. The Source field displays the source of the import data.

For example: If the data were imported from SCMS, the name is displayed in the Source field on the Forecast Data Import Reconciliation window (see Figure A-6—Product Import Reconciliation window).

The Date field displays the date on which the import file was created. The Override Default Case Size on Import? field identifies if the import values will overwrite the default case size in the database.

7. Deselect "Override Default Case Size in import?" if you do not want the default Case Size overwritten with what is in the import file.

The Product column displays the Product Code and Product Name for the products in the imported forecast data file. The Select field is used to select which product forecast consumption data will be imported. The final two columns are used to map forecast data file products to the product displayed in the selected product list and to existing PipeLine products, if necessary.

	All products that match a product in either the product list file or in PipeLine will automatically be mapped; the mapping cannot be modified.

To select consumption data for import—

8. Click on the Select column for each product whose consumption data you would like to import into PipeLine.

To associate consumption data to be imported with product in the Product List—

9. Click on the arrow next to a data field in the SCMS Product column, and select the product that corresponds to the imported consumption data.
10. Repeat the process for each product that needs to be associated with a product in the Product List.

WARNING!!	Mapping consumption data to a product in the Product List will not import it. You must also check the Select column in the corresponding row to import it.

To associate a product being imported with existing PipeLine products—

11. Click on the arrow next to a blank data field, and select the PipeLine product that corresponds to the imported consumption data.
12. Repeat the process for each product that needs to be associated with an existing PipeLine product.

WARNING!!	Mapping a new product to an existing PipeLine product will not necessarily import it. You must also check the Select column in the corresponding row to import it.

After you select the products to be imported and associate the products where applicable—

13. Click on the OK button to complete the import.

	If you check the Select column for a product and then leave both the SCMS Product and PipeLine Product columns blank, a brand new product in PipeLine will be created with this product's forecast consumption data. If you check the Select column for a product and then select a SCMS Product but not a PipeLine Product, the SCMS Product will be imported into PipeLine and all corresponding forecast consumption data will be associated with this SCMS Product's name. If you check the Select column for a product and then select a SCMS Product and a PipeLine Product, the SCMS Product will be imported into PipeLine replacing the existing PipeLine Product and all corresponding forecast consumption data will be associated with this new SCMS Product's name. If you check the Select column for a product and then select a PipeLine Product but not a SCMS Product, the forecast consumption data will be associated with this PipeLine Product's name.

After the selected consumption data is imported into PipeLine, the Import Report will be displayed. This report shows all the products which were imported with associated forecast consumption data, and also lists any errors for the products that were selected but not imported. Using the toolbar, you can export the report to Word, Excel, or PDF.

! !	The system does not save these reports, so is strongly recommended that you either export or print the report (before closing it).

After the report is closed, you will return to the main screen, and will be able to view the newly imported products and consumption data.

Import Actual Consumption Data

To import actual consumption data—

1. Click on the Import Menu Bar option.
2. Click on the Consumption option.
3. Click on the Actual option.

The Import Consumption Data window is displayed (see Figure A-11).

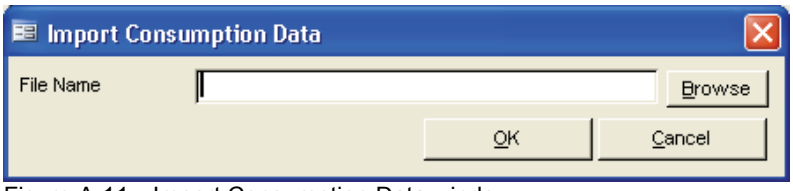


Figure A-11—Import Consumption Data window

4. Type the location of the file you need to import, and click the OK button.

> If you are not sure where the file is located, use the Browse button. Click on the Browse button, and use Windows Explorer to locate the file you need. Click on the file, and click Open.

PipeLine displays a confirmation message, so you can confirm that the selected data can be imported.

WARNING!!	Never import a file from the A:\ drive. Move the data from the A:\ drive to your hard disk, then use the Import Option to select the data.

After you locate and import the file, PipeLine displays the Import Reconciliation window (see Figure A-12).

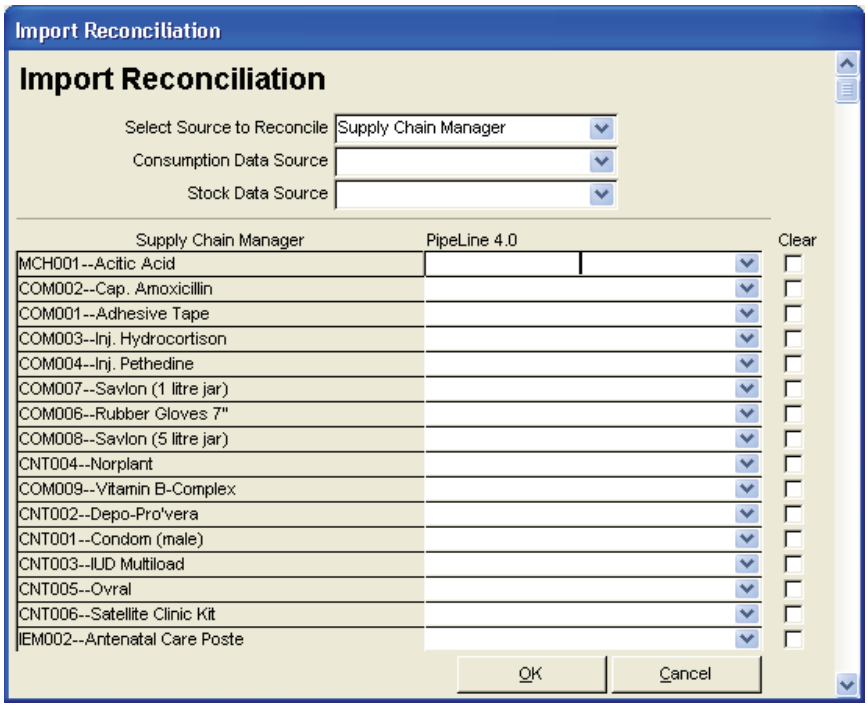


Figure A-12—Import Reconciliation window

Reconciling Imported Data

The imported actual consumption data can be reconciled.

The Source to Reconcile field displays the source of the import data.

For example: If the data were imported from a tool such as Supply Chain Manager, the name of the tool is displayed in the Select Source To Reconcile field on the Import Reconciliation window (see Figure A-12).

If the entry in the Select Source to Reconcile field does not reflect the imported data's origin—

5. Click on the arrow next to the Select Source to Reconcile field, and select the import data's source from the pull-down menu.

The Consumption Data Source field identifies the source of consumption data (e.g., reports, estimates, etc.).

6. Click on the arrow next to the Consumption Data Source field and select the consumption data source from the pull-down menu.

The Stock Data Source field identifies the source of stock level data (e.g., physical inventories, reports, etc.).

7. Click on the arrow next to the Stock Data Source field, and select the stock data source from the pull-down menu.

After you select the appropriate data sources, you must associate the products of the imported data set with products in PipeLine.

For example: Figure A-13 shows that the imported product CNT003—IUD Multiload is associated with PipeLine product CT38—Copper T, 380.

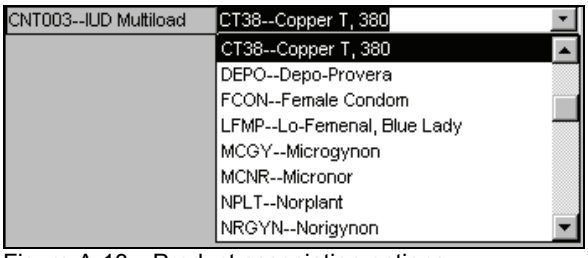


Figure A-13—Product association options

To associate imported products with PipeLine products—

8. Click on the arrow next to a blank data field, and select the PipeLine product that corresponds to the imported product.

9. Repeat the process until all imported products are associated with corresponding PipeLine products.

After you associate all products—

10. Click on the OK button to reconcile the data.

Reconcile Consumption Data

The Reconcile option of the Consumption Menu Bar option performs the same operation as the reconcile step of the Import Actual Consumption Data function. To reconcile actual consumption data—

1. Click on the Import Menu Bar option.
2. Click on the Consumption option.
3. Click on the Reconcile option.

See Reconciling Imported Data on page A-11 for instructions on reconciling PipeLine data.

Importing Shipment Data

The Shipment Import option of the Import Menu Bar option becomes available after you create and save a new program. This option enables you to import data from other commodity management systems.

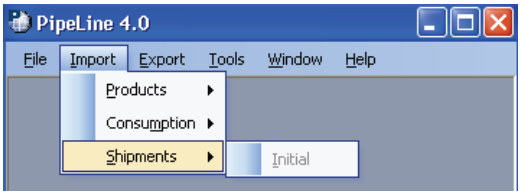


Figure A-14—Import Shipment options

	You will only be able to use this option if you have access to an exported data file, and the program you are currently working with does not have any USAID shipments associated with it. **This option can only be used once per program.**

To import shipment data—

1. Click on the Import Menu Bar option.
2. Click on the Shipment option.
3. Click on the Initial option.

A window is displayed, showing the file(s) available for import. Files are identified by the **.d** extension (e.g., woo1120.d, 0201020.d, 03021r00.d, etc.).

4. Click on the file you need to import.
5. Click on the Open button to import the file.

A window is displayed, asking if the file you selected contains SCMS shipments.

6. Click Yes if the file being imported contains SCMS shipments, otherwise click No.

The selected data is imported into PipeLine.

PipeLine's Export Utilities

The Export option of the Menu Bar lets you export program data (see Figure A-15).

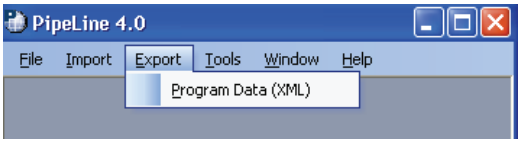


Figure A-15—Export options

Exporting Program Data

To export program data—

1. Click on the Export Menu Bar option.
2. Click on the Program Data (XML) option.

PipeLine displays the Save Output Data To window so you can save the current program data as an XML file (see Figure A-16). The default file name is created by PipeLine based on the Program Code and the date.

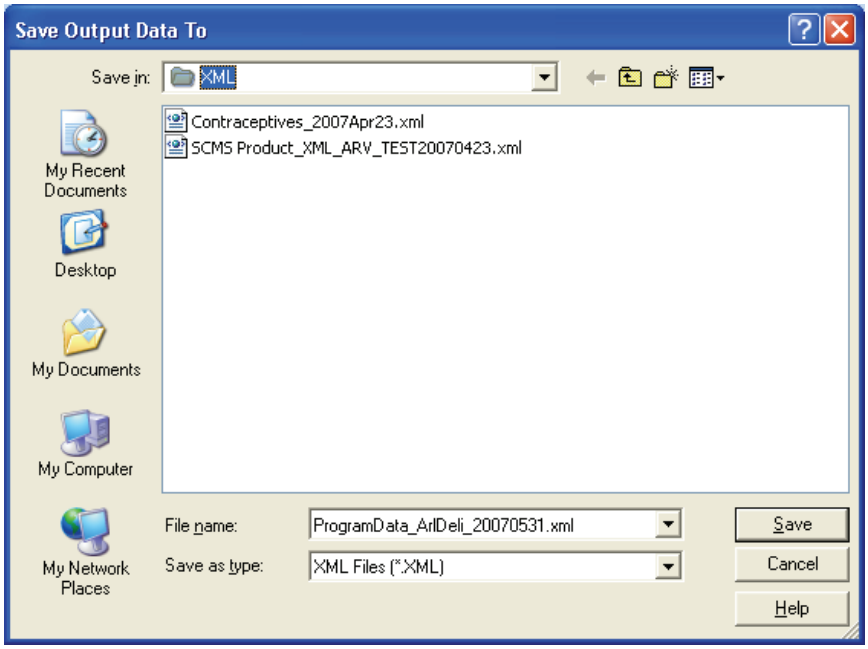


Figure A-16—Save Output Data To window

If Export -> Program Data (XML) is selected by accident, you can go back to the previous screen by clicking the Cancel button on the Save Output Data To screen.

3. Click on the Save button to accept the default file name.

   Or, type a new file name and click on the Save button.

WARNING!!	Never save the data to your A:\ drive.

PipeLine displays the Program Data Export (XML) window as notification that the export of program data was successfully completed. This window shows the location of the newly created file.

4. Click OK.

Your previous location in PipeLine is redisplayed after the data is saved.

PipeLine's Tools Utilities

The PipeLine Tools Menu Bar option lets you change PipeLine's display language, access the PipeLine Summary module, compact the PipeLine database, and choose a PDF printer.

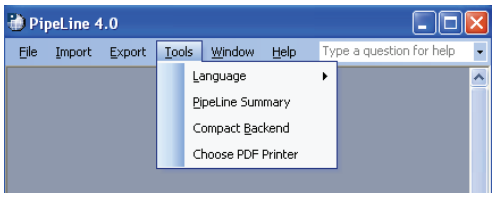


Figure A-17—Tools options

Changing the Display Language

PipeLine supports English, Spanish, French, Arabic, and Portuguese. To change the display language at any time, use the Language option of the Tools Menu Bar option. This temporary change remains in effect for the duration of the session.

	Only PipeLine's screens, buttons, and messages are converted to the selected language. Data entered into PipeLine remains in the language it was entered in. *For example:* Data entered into PipeLine in English remains in the English language. This, however, does not prevent you from entering data in any of PipeLine's supported languages.

To change the language of the current session—

1. Click on the Tools Menu Bar option.
2. Click on the Language option.

The Language pop-up menu is displayed (see Figure A-18).

3. Click on the desired language.

PipeLine's screens, buttons, etc., are displayed in the selected language until the current session is closed.

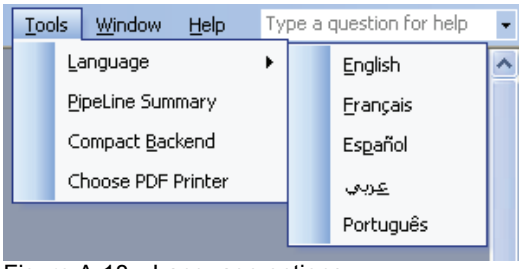


Figure A-18—Language options

Accessing the Summary Module

The PipeLine Summary module (only available in English) is intended for program managers and/or consultants responsible for managing multiple programs tracked by PipeLine. It aggregates PipeLine data from selected programs, and arranges the data so it can be presented in a graph or report.

To access the PipeLine Summary Module—

1. Click on the Tools Menu Bar option.
2. Click on the PipeLine Summary option.

See Section 8, PipeLine Summary, for detailed information on the PipeLine Summary Module.

Compacting the PipeLine Database

PipeLine provides a function to compact the current program file, often referred to as *compacting the backend*. The Compact Backend option is useful if you use PipeLine on a laptop and are running out of disk space.

To compact the PipeLine database—

1. Click on the Tools Menu Bar option.
2. Click on the Compact Backend option.

PipeLine compacts the database and displays a confirmation message.

3. Click on OK.

Choose PDF Printer

The Choose PDF Printer option enables you to define your PDF writer so you can create PDF PipeLine graphs and reports within the software (see Figure A-19).

To choose your PDF writer—

1. Click on the Tools option of the Pipeline Menu Bar.
2. Click on the Choose PDF Printer option in the pull-down menu.

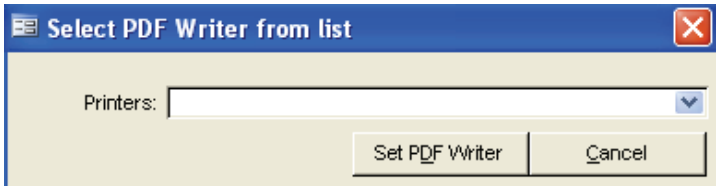


Figure A-19—Select PDF Writer from list

A window is displayed, showing the printers available on your machine.

3. Click on the arrow next to the Printers field, and select the PDF writer from the pull-down menu.
4. Click on the Set PDF Writer button to set the printer.

PipeLine's Help Utility

The PipeLine Help utility provides access to PipeLine's online help system. It also provides access to PipeLine's About feature. This feature lets you see what version of PipeLine you are running. Figure A-20 shows an example of the Help drop-down menu.

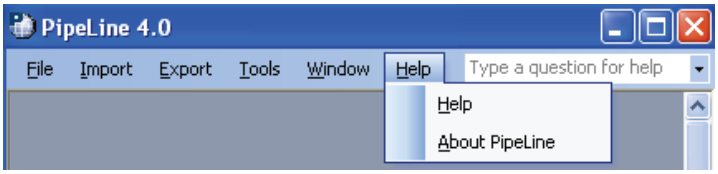


Figure A-20—Help options

PipeLine's About Feature

The About PipeLine option of the Help drop-down menu displays the PipeLine version you are using.

To view the version of PipeLine you are currently using—

1. Click on the Help option on the PipeLine Menu Bar.
2. Click on About PipeLine.

PipeLine displays the About window (see Figure A-21).

3. Click on the Close button to close the About window.

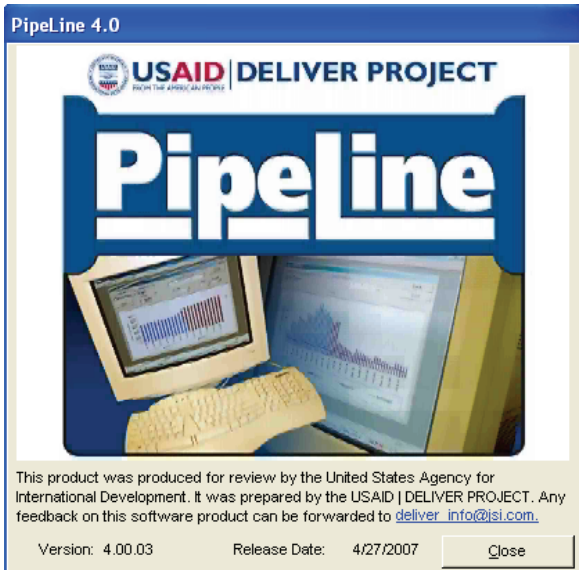


Figure A-21—PipeLine's About window

APPENDIX B TERMS AND DEFINITIONS

INTRODUCTION

The following terms are used in PipeLine:

PIPELINE TERM	DEFINITION
Above Maximum	Stock level is higher than required for the maximum months desired for the program.
Action Required	Needed procurement action based on lead times and shipment status.
Active Product	Products currently in use. PipeLine does not monitor or include in multi-product reports any products that are not marked "active."
Adjustment Date	Date on which an inventory adjustment occurred or is projected to occur.
Backup	Saves PipeLine program data files to a specified location.
Basic Unit (BU) UOM	UOM is used to count the products at the usage level. This may or may not be the same as the Pack UOM: for example, bottle, tablet, test, box, ml, gram, co-pack, or pair of gloves.
Beginning Balance	Stock quantities equal to ending balance for previous period.
Below Minimum	Stock level is lower than required for minimum months desired for the program.
Case Size	Minimum shipping unit quantity.
Category	Group where products and other categories can be assigned. If a category has products assigned directly to it, then it is also a type.
Case Qty	Number of packs per carton.
Case UOM	Minimum shipping unit: for example, carton, case, shipping carton, carton of gloves.

PIPELINE TERM	DEFINITION
Code	Identification code used by the database but usually not found in the reports.
Confirm Shipment Ordered	Indicates a planned shipment should be ordered by the action date.
Confirm Shipment Dispatched	Indicates an ordered shipment should be shipped by the action date.
Confirm Shipment Received	Indicates a shipped shipment should have been received by the action date.
Consumption, Actual	Product quantity estimated or known to have been dispensed to clients for any number of months.
Consumption, Forecast	Product quantity forecasted or projected to be dispensed to clients for any number of months.
CPT	Contraceptive procurement tables. USAID's format for computation of calendar year quantities required and generation of data for USAID's planning requirements.
CYP	Couple-years of protection. The percentage used to calculate the amount of pregnancy protection afforded by a contraceptive product or method for one year. *This only applies to contraceptives.*
Data Source	Information source for each primary record.
Date of Next Action	Date the procurement status of a shipment should change (for example, from Ordered to Shipped), based on lead times.
Date of Problem	Date an indicated problem is projected to occur or did occur.
Default Supplier	Product's normal supplier.
Desired End of Year Stock [in Months] (DEOYS)	Used by the CPT Report to calculate requirements based on the amount, in months of stock, the product should have at the end of the year.
Ending Balance	Beginning period's balance computed by subtracting consumption, adding shipments received (if any), and adding or subtracting inventory adjustments for the period.
Inventory Adjustment	Event other than Consumption or Shipments that changes the program's inventory balance. This is typically a loss (for example,

PIPELINE TERM	DEFINITION
	expiry, damage, theft) or transfer (out of or into the program, such as a loan from or to another program).
Inventory Date	Date an inventory count was made.
Inventory Count	Physical inventory quantity record that creates an adjustment to recalculate ending balance.
Lead Time, Supplier	Months needed for procurement actions. Estimated dates are based on these lead times.
Lead Time, Program	Months needed for procurement actions. Procurement action dates for *needed* shipments are based on these lead times. Estimated shipment dates are based on these lead times if supplier lead times are not in PipeLine.
Lead Time Dates, Shipment	Dates entered for order and/or shipping. When a shipment's status is changed from planned to ordered or ordered to shipped, the date the status changed must be entered. These dates override estimated lead time dates for a particular shipment.
Maximum	Maximum level of stock desired by the program, including storage facilities and service delivery points, expressed as the number of months the quantity is expected to last. Exceeding this level could result in problems related to high storage costs, exceeding storage capacities, and/or loss of product due to expiry or storage conditions.
Method	Category that has a CYP factor defined for it. If products are assigned to a Method, then the Method is also a Type and CYP graphs will be available for the products assigned to it.
Minimum	Minimum stock level desired by the program, including storage facilities, expressed as the number of months the quantity is expected to last.
Needed to Reach Max	Stock quantity needed in a month to bring the ending balance up to the maximum.
Needed	Quantity needed to reach maximum in a month for which the ending balance is projected to fall below minimum.
Order to Ship	Estimated lead time (in months) expected from the time a shipment is ordered to when it is shipped.
Ordered	Shipment for which funds have been allocated, the product has been identified as available, and the order has been placed.

PIPELINE TERM	DEFINITION
Parent Category	Category that another Category is assigned to. Each Category can have only one Parent Category.
Pack Size	Number of BUs per pack. When the UOM is the same as the BU, the pack size is equal to one.
Pack UOM	UOM is used when ordering and counting the products at the stockkeeping level: for example, bottle, co-pak, box, kit, carton, case, or box of gloves.
Permitted in Country	At least one manufacturer has importation permission for a country for a specified product.
Plan Shipment	Indicates that the ending balance for the month is projected to fall below the minimum. Thus, the quantity needed to reach the maximum should arrive as a shipment during the month.
Plan to Order	Estimated lead time (in months) expected from the time a shipment is planned to when it is ordered.
Planned	Shipment whose quantity, supplier, and desired receipt date have been determined and entered into PipeLine.
Product	Specific commodity to be monitored and procured.
Program	Refers to the organization that owns/manages the logistics system and dispenses the products to clients, such as the Ministry of Health or the Family Planning Association.
Received	Shipment that has been received by the program and made available for consumption.
Ship to Receive	Estimated number of months expected from the time a shipment is shipped to the time the program receives it.
Shipped	Shipment that has been dispatched to the program but not yet received.
Shortfall/Surplus	Ending balance quantity that is below the minimum or above the maximum.
Stockout	Ending balance is zero.
Stock in Months	Ending balance divided by the average monthly consumption. Average monthly consumption is calculated by adding the month's consumption to the following two months of consumption. The resulting sum is divided by three.

PIPELINE TERM	DEFINITION
Supplier	Donor or other source that supplies a product to a program.
Surplus: Change	Indicates that receipt of this shipment will cause the ending balance for the month to rise above maximum.
Trend Analysis	Report showing consumption data in PipeLine and the trend of the actual consumption data.
Type	Category that has products assigned to it. Each product can be assigned to only one type.
UOM	A unit of measure.
Value, Product	Per unit value of a product.

For more information, please visit deliver.jsi.com.

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