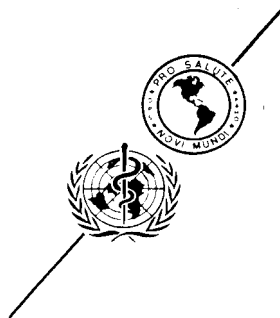


Humanitarian Supply Management System SUMA

SMS Central Level

USER'S MANUAL

VERSION 5.1 for Windows



Pan-American Health Organization
Pan-American Sanitary Bureau •
Regional Office of the World Health
Organization
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May 2000

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SUMA, a system developed by the Pan American Health Organization, acknowledges the generous financial support of the Government of The Netherlands since 1992, and recently the European Community Humanitarian Office (ECHO).



1. Introduction

The Humanitarian Supply Management System (SUMA) was launched as a collective effort by the countries of Latin America and the Caribbean, with the technical support of the Pan American Health Organization (PAHO). Since 1992, it had also enjoyed the financial support of the people and government of the Netherlands. Its objective is to improve relief supply management in the event of a disaster or emergency. The system is meant to work regardless of whether these supplies come from other cities or regions within the affected country, or have been provided by the international community. Recently, the European Union's Office for Humanitarian Assistance (ECHO) has also contributed to the initiative. **SMS** stands for **S**upply **M**anagement **S**oftware.

Problems with the arrival of unsolicited supplies

In the aftermath of a disaster, one of the main problems confronting national or authorities is identifying accurately what relief supplies have arrived, where they have been stored, and how useful they are. Often, well-meaning but misinformed donors send items that are not particularly useful, given the nature of the emergency as well as conditions on the ground.

Strictly speaking, this is a technical problem, but it has serious repercussions for policy implementation¹, given the following factors:

1. All too frequently, the storage space, transport, and human resources dedicated to relief supply management are scarce and must be allocated as efficiently as possible.
2. Technical information about arriving supplies is often lacking, making it harder to allocate them.
3. Because of these problems, the donors and the media get a negative impression of relief management efforts, through no fault of the disaster managers themselves.

SUMA's objective

SUMA's objective is to prevent relief supply management inefficiencies by promoting a systematic approach involving trained staff, sound classification procedures, and a user-friendly, flexible information technology mechanism to ensure that incoming supplies are properly sorted, inventoried, and prioritized at their point of entry. The following steps are taken to maximize supply allocation effectiveness:

¹ *Disasters, Preparedness, and Mitigation in the Americas*. January 1993, SUMA.

- Trained health staff sort and classify supplies as they arrive.
- Labels are attached to the incoming boxes and/or packages with the following information:
 - Distribution priority.
 - Whether the consignment contains health care items, including drugs and other medical supplies.
 - Whether items need refrigeration.
- An inventory is kept of the valuable items that arrive, based on technical and operational criteria.
- Donations are registered at the point of entry using a computerized system.
- National authorities receive daily reports detailing the name of the donors, the recipients, and the type of supplies provided, etc.
- The country's efficiency is demonstrated by the use of advanced technology.
- Visitors obtain a favorable impression of emergency management efforts.
- Donors are sent an immediate confirmation via fax or e-mail as soon as the supplies have reached their intended recipient.

To attain this objective, all donations, regardless of their origin or ultimate recipient, are processed at the point of entry using the SUMA system before they are delivered. This requires that relief management organizations and institutions, whether governmental or non-governmental, cooperate closely to adopt operational policies and strategies before a disaster strikes.

As countries gain experience in the use of SUMA, they often start implementing it to meet goals that were not included in the original SUMA project. A case in point is the use of SUMA to keep track of supplies provided by local, rather than international, donors. Similarly, the system has been implemented at the local level to set up two field units, one to receive incoming donations and the other to distribute them on the ground. Regardless of how the system is adapted to local needs, it must be stressed that SUMA need not be used only for large-scale emergencies that require international support, but also can be used locally whenever the need arises to receive or mobilize supplies.

System components

The system has three levels:

- SUMA CENTRAL
- The Field Unit
- Warehouse Management

SUMA CENTRAL is designed to operate at emergency management headquarters, i.e., the facilities where national authorities are managing a disaster or emergency.

At this level, the main tasks are to:

- Establish the criteria to be used by the Field Units, such as reception sites, consignment directories, definition of the main user, etc.
- Create Field Units.
- Consolidate the information sent by the Field Units.
- Respond to queries and prepare reports to support the decision-making process and promote inter-institutional coordination.
- Maintain the program tables (lists).

FIELD UNITS are designed to work at the points of entry (e.g., borders, ports), and at local collection centers where supplies arrive during an emergency, such as airports, collection sites, etc.

The main tasks at this level are to:

- Sort incoming supplies and label them URGENT – FOR IMMEDIATE DISTRIBUTION, FOR NON-URGENT DISTRIBUTION, and NON-PRIORITY ITEMS.
- Classify supplies by category and subcategory, and itemize them.
- Reply to selective queries about available items.
- Prepare reports on consignments that have arrived at that field unit.
- Provide receipts for recipients to fill as proof of delivery.
- Consolidate all relevant data on diskettes to be sent to SUMA CENTRAL

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

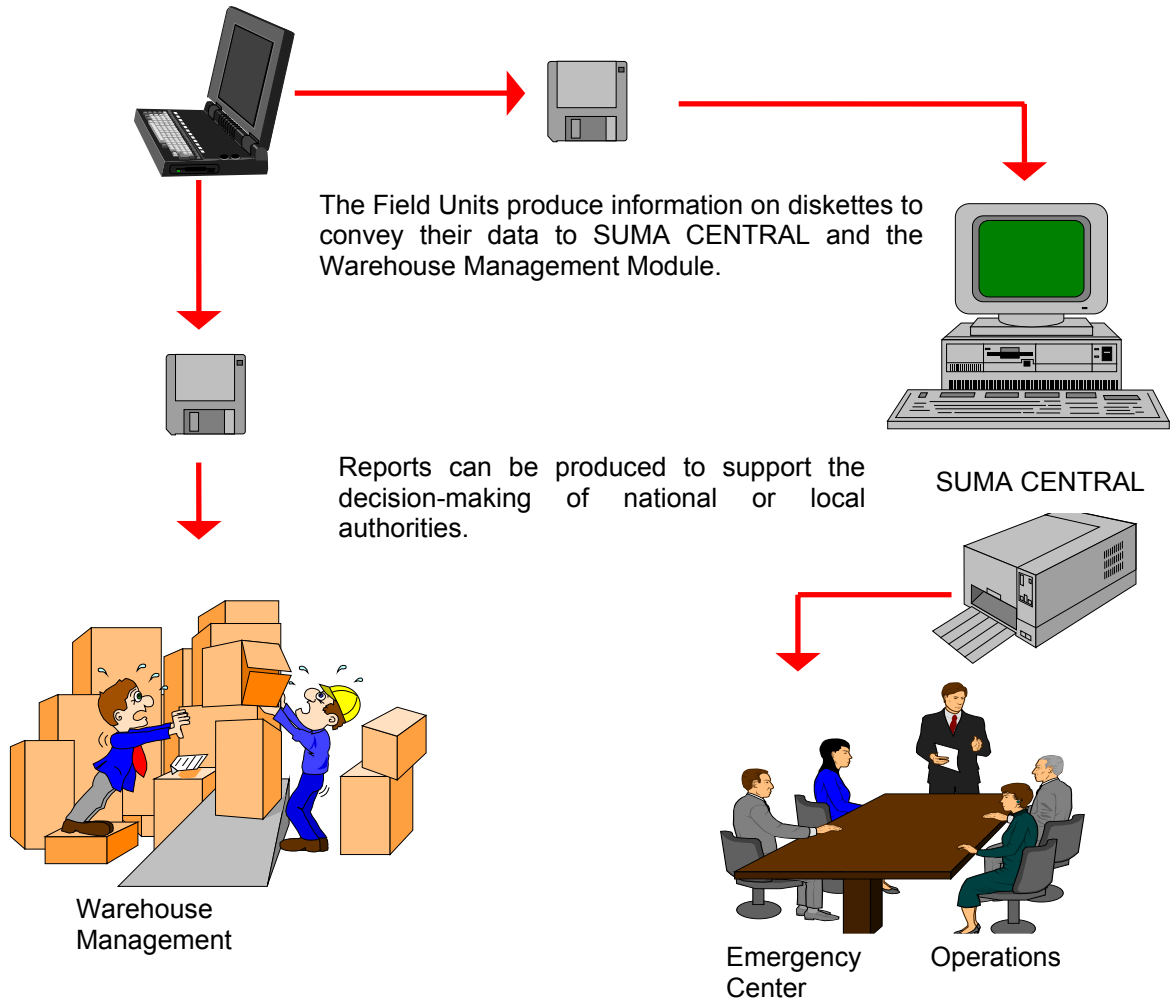
The **WAREHOUSE MANAGEMENT** Module is a tool that registers the arrival of supplies to storage centers or warehouses and their departure for distribution. These warehouses receive supplies as well as electronic tracking information sent by the Field Units or SUMA CENTRAL. In this way, institutions can coordinate the internal management of relief supplies or their distribution to other facilities or organizations involved in disaster relief efforts.

The main tasks carried out at this level are:

- Keeping track of the local inventory.
- Preparing reports on stocks and deliveries, according to several criteria and categories.

- Following up on the inventory in other warehouses, whether they are branches of the current warehouse or separate collection centers.

The following chart provides a functional vision of the system:



The Consignment

A **consignment** is a set of supplies that the same sender sends to the same recipient and that arrives at the same time by the same means of transport. It is the basic unit of reference for the system. The entire process of classifying and manipulating data on incoming supplies focuses on consignments.

The **point of entry** is the place where consignments arrive: sea and river ports, airports, customs offices, warehouses, etc.

The following examples may illustrate these concepts, assuming that the supplies arrive by the same **means of transport**:

- A ship arrives with a load of eight tons of wheat sent by the WFP to the Costa Rican Red Cross. It is a single item, sent by a single sender, and meant for a single recipient; therefore it will be registered as one consignment.
- A plane arrives with consignments for several recipients in Honduras. Three institutions or groups in Mexico have sent them:
 - Civil Defense sends various supplies to the Permanent Emergency Commission.
 - The Mexican Ministry of Health sends medical supplies to their Honduran counterparts.
 - The Honduran community in Mexico City sends food and clothing to the Red Cross for distribution in Honduras.

Facilities Even though they all arrive on **the same flight**, from **the same country**, they come **from different organizations** and **have different recipients**, so they must be registered as **three** separate consignments.

Another case might be that one organization sends supplies to four different recipients within the same country. Alternatively, whether because of their bulk or due to transport limitations, relief supplies are sent to the same recipient by the same organization on four separate flights. In either case, we must record them as **four** consignments.

Activities in the supply reception

Before supplies can be delivered to their intended recipients, three steps must be taken:

- Sorting
- Classification
- Inventory

Sorting

Supply management and distribution priorities are determined by the guidelines set forth by the emergency management agency or the SUMA Team Coordinator. These priorities depend on the type of disaster and the national or local needs. For instance, in the event of an earthquake, medical supplies for the treatment of wounds and fractures would be crucial; in the case of floods, priority items would include food and water.

All incoming boxes and packages must be sorted and then labeled and color-coded so as to show clearly their level of priority. Moreover, health supplies

must be identified with an additional **green label**. SUMA's priority levels and corresponding color codes are the following:

- Priority 1: **URGENT – FOR IMMEDIATE DISTRIBUTION**. These items must be distributed immediately at the site of the emergency. Label color: **Red**.
- Priority 2: **FOR NON-URGENT DISTRIBUTION**. These items are not urgently needed during the critical phase of the emergency, but may be useful later, during the reconstruction or development phases. Label color: **Blue**.
- Priority 3: **NON-PRIORITY ITEMS**. Some supplies may already have expired, or they have been damaged in transit. It may be impossible to identify them, or for any other reason they will be useless in the context of the current emergency. Alternatively, they may have been packed together in such haphazard fashion that it would be impossible to sort them efficiently during the critical stage of the emergency. In these cases, recipients may classify these items later, when human resources are not so pressed for time. Label color: **Black**.

For instance, in the disasters that took place in the Americas in the last decade, donations of pharmaceutical products broke down as follows:

- 15% were used immediately.
- 15% had no immediate use, but were used later after being stored safely.
- Approximately 70% had expired or were otherwise unusable.



Expired drugs may remain effective between three and six months after the expiration date. Depending on the importance of the drugs to the emergency, they might be classified as priority items for immediate distribution, indicating that they have expired and require a laboratory analysis to obtain a new certification. Health authorities should make such decision.

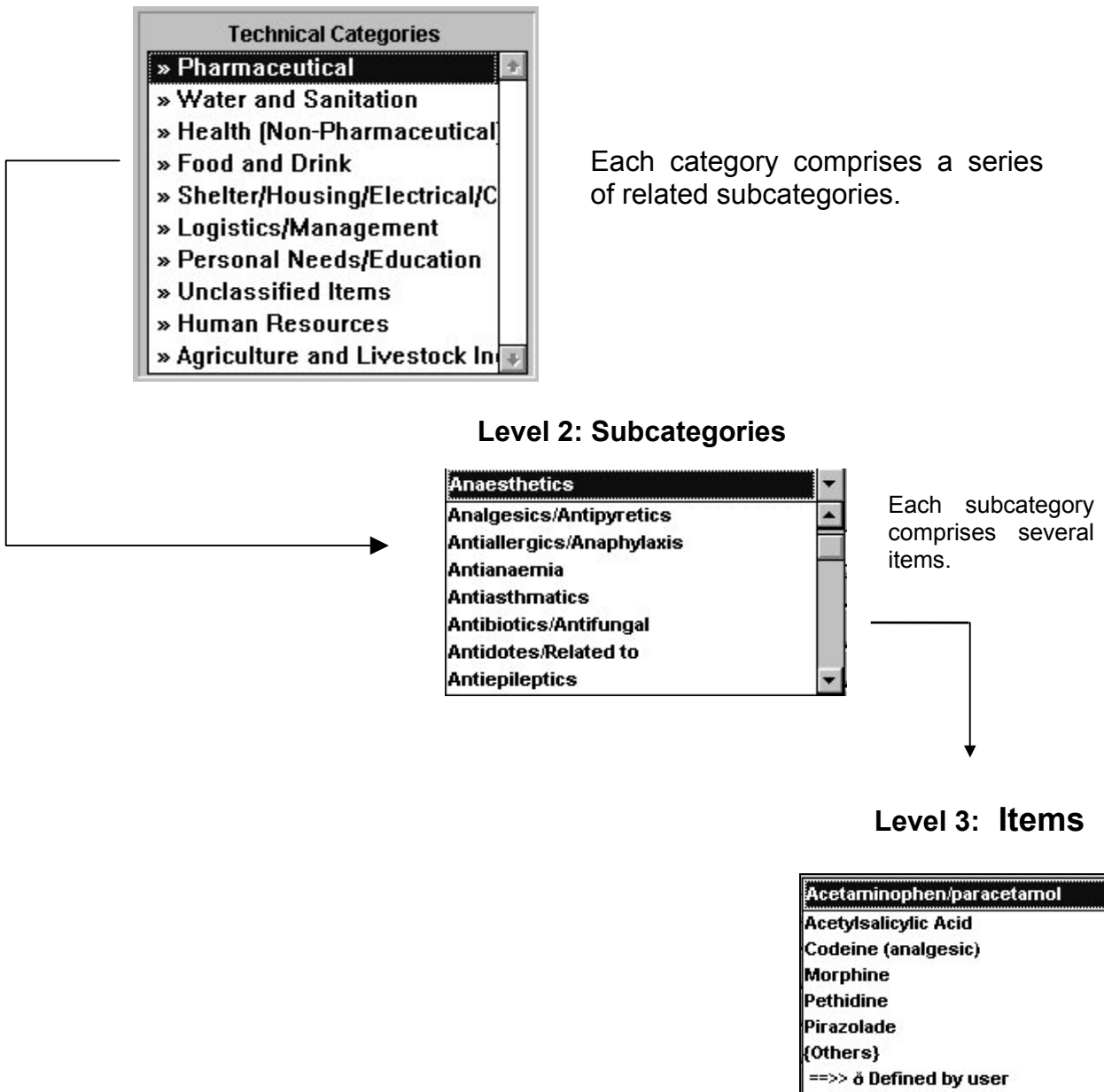
Classification

Within the SUMA system, relief supplies fall into one of the following ten technical categories:

Pharmaceuticals	Shelter/Housing/Electricity/Construction
Water and Environmental Sanitation	Logistics / Administration
Health (Non-Pharmaceutical)	Human Resources
Food and Drink	Agriculture (including Livestock supplies)
Personal Needs/Education	Unclassified Items

The basic recording unit in each consignment is the **item**. Examples include wheat, canned soups, aspirin and lidocaine. Each item can be identified by a series of characteristics such as its generic and brand names, its presentation and packaging unit (pills, kilograms, boxes or bags), and the total quantity received.

Each item falls within a category and a subcategory. For instance, an ambulance would be an item that would fall within the “Health” category and the “Transport of patients” subcategory.



In other words, every record must include the fields Category, Subcategory and Item. The only exception is the Unclassified category, where items are listed according to Category and General Type of Supply.

The Unclassified Items category enables the staff at the point of entry to deal with expired items, items that are unknown or unusable, or items that are too difficult to sort on the spot and must be classified eventually by the recipient when time and manpower allows, during or after the emergency.

Inventory

The inventory stage makes it possible for daily reports to be sent to the relevant national or local authorities on what supplies have been received and other relevant data, including the sender, the intended recipient, the categories of the supplies received, their quantity, and so on. Recipients can then make informed decisions on how to allocate these resources and otherwise manage the emergency. They can also notify donors directly of the arrival of their consignments.

2. Installing the SUMA CENTRAL Module

Technical requirements

1. The minimum hardware and software requirements to install SUMA are:

Computer Requirements	
Processor	486 or higher.
RAM	8 MB or higher.
Use of mouse	Recommended.
Operating System	Windows 3.x, Windows 95, Windows 98
Free space on hard disk	40 MB (minimum)
Printer	Dot matrix, inkjet or laser.
Floppy disk unit	3.5", 1.44 MB
Additional drives	CD ROM Unit.

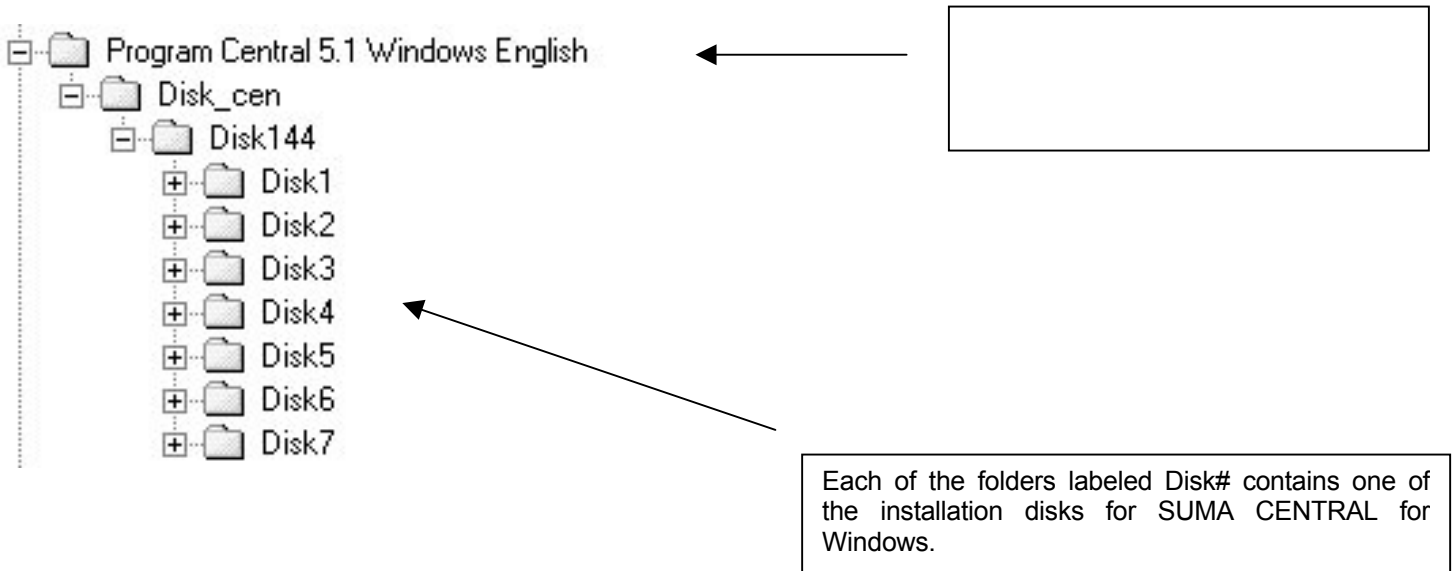
2. Please verify that the date and time reported by the operating system are correct. This is important because SUMA software relies on the computer's date and time to make accurate reports of incoming consignments and other data.

Installing SUMA CENTRAL

There are two ways of installing the SUMA CENTRAL Module. Verify that you have the CD-ROM, or else that you have the five numbered diskettes labeled SUMA CENTRAL. Installation diskettes can be copied from the CD using the SUMA software, as will be explained later.

Installing from a CD-ROM

On the SUMA CD-ROM you will find a folder (directory) with the following structure:



Open the \Disk_cen\Disk144\Disk1 folder, as seen above, and execute (double-click) the **SETUP.EXE** file. The installation process will begin automatically.

You will see a configuration dialogue box that will allow you to change the hard disk where the installation will take place. By default, the software is installed on disk C:.

Installing from the diskettes

1. Verify that you have the installation diskettes handy.
2. Insert installation disk 1 in the 3.5" floppy disk drive, selecting A: or B: as the case may be.
3. Locate the **SETUP.EXE** file on the disk and make it execute by double-clicking on the name with the mouse. A setup screen will appear and guide you in the installation process.
4. The program will ask for the remaining diskettes in sequence in order to complete the installation.

Creating a set of installation diskettes using the CD ROM

Copy **the contents** of each of the Disk# folders onto a different diskette. The diskettes should be numbered exactly like the folders: 1, 2, 3, etc. If you then wish to install from the disks, follow the instructions above.

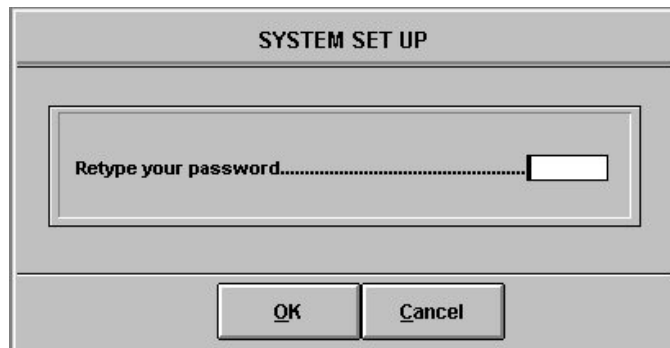
If at some point in the installation the MS-DOS window pops up, close it with a click or by hitting <ENTER> when the cursor is on the **Close** option of the window control icon. If no problem has occurred during the installation, the program should start up. Otherwise, you will get an Error message

When setup is over:

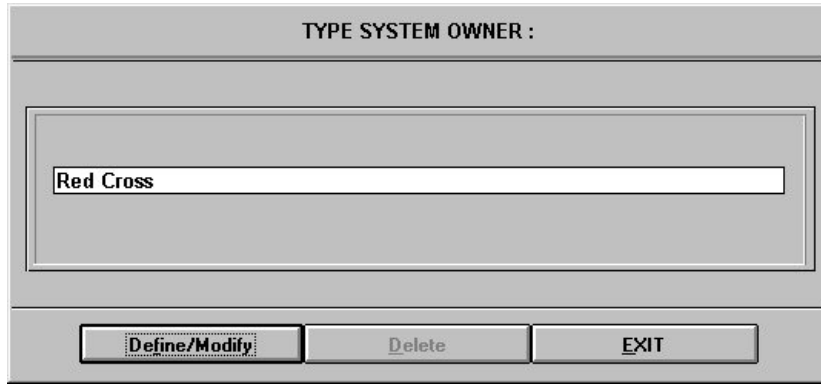
After using the last diskette, the system will be installed on your hard disk, and the screen will show a window requesting the Configuration Password of the CENTRAL Module. Type it in and choose <Accept>.

IMPORTANT: This password will be required later for all SUMA CENTRAL configuration options. Please select a password that is easy to remember.

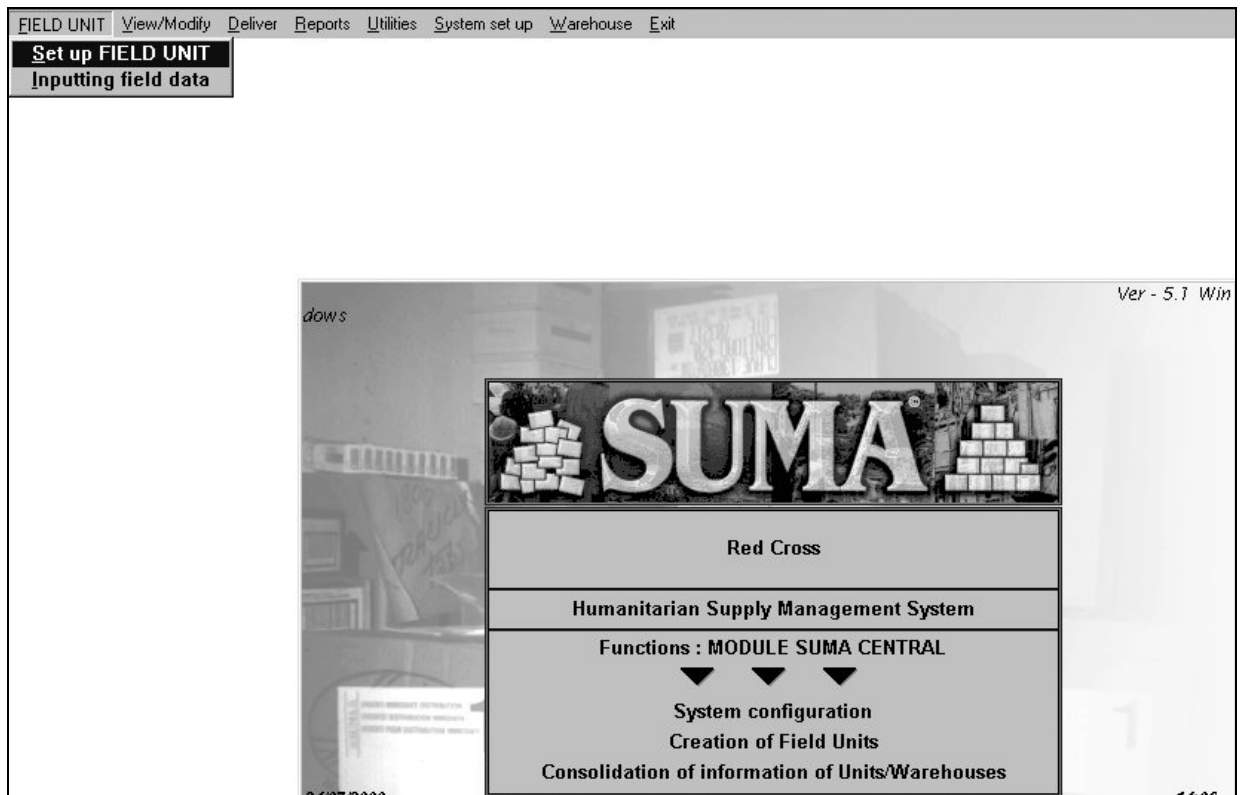
Retype the password and click on <Ok>.



Next the system will ask you for the name of the main user, i.e., the institution in charge of managing the emergency and processing and distributing the information generated by SUMA CENTRAL and the FIELD UNITS under it, for instance the Red Cross, Civil Defense, or the Ministry of Health. Type in the correct name and select the <Exit> button when you are done.



Next you will see the main menu window of the SUMA CENTRAL Module, Version 5.1 for Windows.



The Main menu

The pull-down menus are the means by which you communicate with the application. There you will find most of the operations and actions needed to access the various modules for data input and output. Clicking on them with the mouse or using the keyboard can activate them.

Selecting the various options

With the keyboard

1. When you start the program, the default option will be. **FIELD UNIT**. To select another heading, use the left (←) and right (→) arrow keys on the SUMA FIELD UNIT pull-down menu.
2. Use the Up Arrow (↑) or Down Arrow (↓) keys to move up or down the pull-down menu until you select the option you want, then hit the <Enter> key. Another option is to use “Hot Keys”: type the letter that is underlined in the name of each menu option.

With the mouse

1. Place the mouse pointer over the option you are interested in and click on it to display the pull down menu.
2. Point at the command you want to execute and click on it.

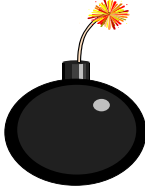
Importance of backing up your data

No computer or software application can offer perfect protection for your data, particularly considering the conditions in which SUMA teams often have to work. The only way to protect your data is to perform regular backups onto diskettes. Version 5.1 of SUMA includes a backup procedure, as well as a Restore Data option in case the data have been accidentally erased from the hard disk. These options are available from the **Utilities** pull-down menu, which will be discussed in a later chapter.

Ending your work session

To end your work session, go to the Exit pull-down menu and select the **Exit this program** option, which appears in the following illustration:

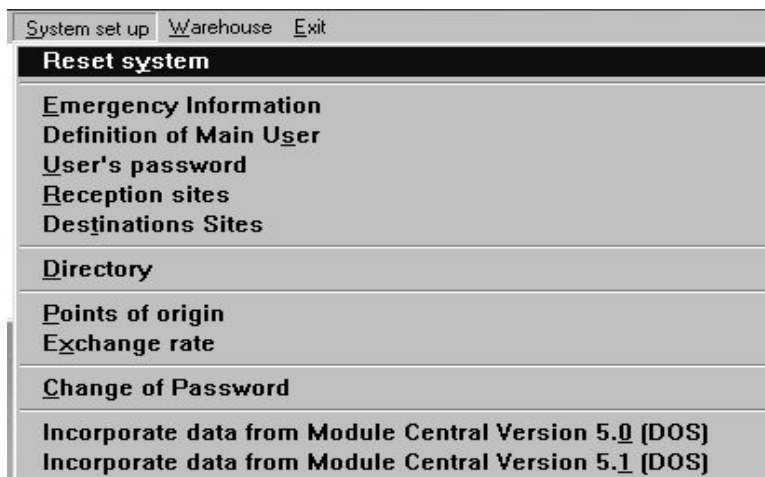




Make sure you always end your work session by selecting the **Exit** option before turning off your computer. If you turn it off before exiting SUMA, your most recent data may be lost or corrupted.

Configuring the SUMA CENTRAL Module

The Module must be configured before the records pertaining to a new emergency or disaster can begin to be kept, so that specific data about the event can be included in the program. It includes such data as the name of the country where the emergency has taken place, the type of emergency and its date, and the definition of the user passwords for accessing the Field Unit Module.. The options available on the **SYSTEM SETUP** pull-down menu are the following:



Reset system

Resetting the system eliminates from the database all the data about a previous emergency or disaster, freeing the system for data input on the current event. Please remember to back up the information about the previous emergency onto diskettes, if necessary.



Be very careful when you select this option. If it is selected after data concerning the current emergency have already been recorded, they will be erased and cannot be restored without a backup.

If data about a previous disaster has been recorded, the program offers the option of creating a backup on diskettes, to store the data for future use.

Emergency information

This is the place to record basic information about the disaster, such as the country in which it happened, the place and date, and the name and type of the disaster. You can also select the language in which you want to work.

The screenshot shows a window titled "INFORMATION ON EMERGENCY". It contains the following fields and values:

- Country affected..... Honduras
- Place and date..... The entire country
- Type/Name of disaster..... Hurricane Mitch
- Set databases in..... ENGLISH (dropdown menu)

At the bottom of the window, there are three buttons: "Define/Modify", "Delete", and "EXIT".

Definition of main user

The main user is the organization in charge of managing the emergency and processing and distributing the information generated by SUMA CENTRAL and the FIELD UNITS under it. Generally, it is a national agency in charge of disaster reduction and management – the National Emergency Commission, Civil Defense, etc. However, if an institution wishes to use the system internally, its name can be typed here. The name that is inserted here will appear on all windows titles and report headings.

User's password

The FIELD UNIT modules require a five-letter password as a security measure, with two goals in mind:

1. Preventing unauthorized access and data input.
2. Facilitating supervision by enabling the administrator to know which users have logged onto the FIELD UNIT modules, and when.

It is in the SUMA CENTRAL Module that these passwords are defined, using the following dialogue box:

The buttons at the base of the dialogue box offer four options to view information concerning registered users:

<Top> will take you to the first record in the users list.

<Previous> will take you to the record immediately preceding the one now on screen, unless the one on screen is the first record.

<Next> will take you to the record immediately following the one now on screen, unless the one on screen is the last record..

<Last> will take you to the last record in the users list.

The option <Browse> shows you a list of all users registered so far.

The other options in the menu have the following functions:

<Add> allows the addition of a new user to the system.

<Modify> allows you to modify an existing record.

<Save> stores the information that has been keyed in.

<Cancel> disregards the current information and keeps you from adding or modifying a record.

<Exit> takes you back to the main menu.

Reception sites

The reception sites are pre-established by the Emergency Manager in charge of the SUMA System. They are those places where consignments will be received and where, therefore, a FIELD UNIT must be set up.

In the Reception Sites dialogue box, select <Add> to add the names of all the places where consignments will be received and classified.

Contact directory

After a disaster strikes, national emergency managers can generally rely on previous experience to know which countries, national or international agencies, or private sector institutions will respond by providing relief supplies. They are also typically aware of which institutions will accept and distribute these supplies. The Directory dialogue box makes it possible for this information to be introduced in advance, saving the FIELD UNITS from having to enter the information again every time they receive a new consignment.

Point of origin

The list of points of origin corresponds to most known countries and some international agencies such as UNDP, FAO, etc. Because supplies can also arrive from regions or provinces within the country, SUMA CENTRAL allows for the inclusion of these new places.

POINTS OF ORIGIN

Dominican Republic

Top Previous Next Last Browse Add Modify Delete EXIT

Exchange rate

Traditionally, the US dollar has been used as the monetary unit of reference in international relief operations. SUMA allows users to record the actual or estimated monetary value of a consignment in a variety of currencies, including the local currency. Conversion into US dollars is performed automatically, based on the exchange rate that you specify here.

EXCHANGE RATE

Name of currency..... \$ US Dollar

Exchange Rate..... 1.00

Last Updated..... //

Top Previous Next Last Browse Add Modify Delete EXIT

Using the **Browse** option in the menu, you can gain access to a list of pre-established currencies and their local exchange rate:

Name of currency	Exchange Rate	Last Updated
\$ US Dollar	1.00	//
Bahamas Dollar	1.00	//
Balboa	1.00	//
Barbados Dollar	2.00	//
Belgian Franc	31.00	//
Belice Dollar	1.00	//
Bolivar	472.00	//
Boliviano	5.00	//
British Pound	1.00	//
Canadian Dollar	1.00	//
Colon (Costa Rica)	207.00	//
Colon (El Salvador)	9.00	//
Cordoba	8.00	//

If you need to modify an exchange rate, select the <Examine> option, find the currency you wish to modify, and then click on <Modify>. Key in the new exchange rate and the current date, then choose <Save> or <Cancel> if you decide against updating the information.

Incorporating data from Central Module version 5.0 and 5.1 for DOS

Using this option, data from the 5.0 and 5.1 for DOS versions of SUMA CENTRAL can be incorporated into version 5.1 for Windows, saving the user the trouble of having to re-enter all the information again.

When using any of these options, the system will present a verification dialogue box. If you decide to go ahead, the program will verify that the MS-DOS version exists and the data is uploaded automatically.

3. Creating FIELD UNITS

FIELD UNITS can only be created after the system has been configured.



Before creating FIELD UNITS, make sure that the user, passwords, reception sites, and information about the emergency have been defined during the initial configuration. Otherwise, an error message will appear and the installation process will be interrupted.

The process is initiated once the user selects the <Set up FIELD UNIT> option from the <FIELD UNIT> pull-down menu.

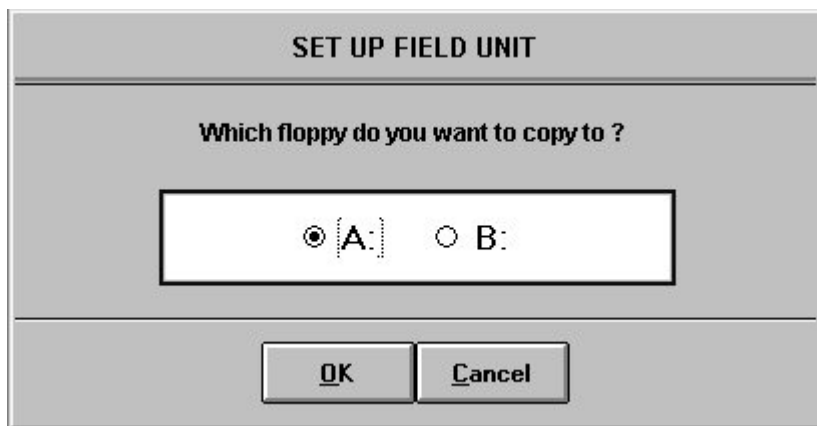


Before starting this process, make sure that you have enough 3-½ 1.44 MB blank and formatted diskettes. You will need one disk for each FIELD UNIT you set up.

Once you have selected <Set up FIELD UNIT>, the program will automatically assign a number to the Field Unit and ask for confirmation before continuing. If you choose “No”, you will return to the Main Menu. Otherwise, the program will ask which floppy drive you wish to use and whether that drive is ready.

In case the disk is defective, has information recorded on it, or is not formatted, or if the disk drive is not ready, an error message will appear, and the program will return to the Main Menu.

The sequence is as follows:



Repeat this procedure for each Field Unit you wish to create. Label the diskette as follows:

Diskette 1/1
SUMA FIELD UNIT #: _____
Reception site: _____

4. Incorporating FIELD UNIT Data

The SUMA CENTRAL Module incorporates the data received from the various Field Units, which is necessary in order to select the following options in the main menu: **View/Modify**, **Deliver** and **Reports**. Without information from at least one Field Unit, SUMA CENTRAL will warn users it has no data to work with.

As stated in the Introduction, the transfer of information between the Field Unit and SUMA CENTRAL modules is done through diskettes. The Field Unit Module's UTILITIES submenu includes an option, <Send data to Central Level>, which will store on diskettes all the data collected so far. This information will be transferred to two diskettes, the second one for backup purposes. SUMA CENTRAL incorporates the data when its user selects the <Inputting Field Data> option from the Field Unit submenu. It will also consolidate the data from all the various Field Units.



Once the < Inputting Field Data> option has been selected, the program will ask which disk drive will be used. After this information is keyed in, the program will copy the information onto the computer's hard disk, re-index the data, and verify that the units of measurement and the consignment information have been filled in correctly. Once this is done, you will automatically return to the Main Menu.

As a security measure, users cannot add new data to a consolidated Field Unit diskette. Attempts to do so will take the user back to the Main Menu after an on-screen message to the effect that the diskette has already been used. The insertion of blank diskettes by mistake will also take the user back to the Main Menu.

It is important to remember two things when restoring data.

- **Diskettes are the means by which the information is transferred.**
- Of the two 1.44 MB diskettes, **you only need to use one**, since the other one is a backup copy in case the first one is defective or gets damaged or lost.

5. Checking and modifying consignments

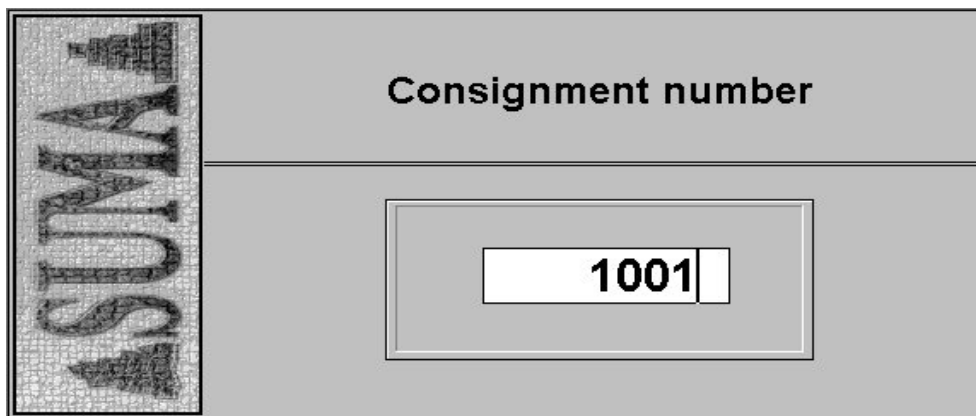
The **View/Modify** menu enables you to look up information about one, several, or all the consignments that have been recorded. If the consignment can be modified, you will be able to edit the data. Otherwise, you will be able to view the data, but a message will be displayed saying, “**The consignment cannot be modified at the CENTRAL level.**”

The **View/Modify** menu includes the following options:



Queries about specific consignments

The **Consignment Number** option gives the user direct access to a consignment by referring to its unique identification number. Remember that the number has five digits: the first two stand for the Field Unit where the consignment was recorded, and the remaining three digits refer to the specific consignment. When you select this option, the <Item Number> dialogue box will appear, including a space where you can enter the appropriate number.



Should the number not correspond to an existing consignment, you will be returned to the Main menu and receive an error message. Verify which is the correct number. If the number is valid, you will see a **POINTS OF ORIGIN** dialogue box.

POINTS OF ORIGIN	
Modify consignment No.....	001001
Date of Consignment D/M/Y.....	21/03/2000
	<input type="button" value="Directory"/>
Point of origin.....	México
Donor category.....	Red Cross Society
Name.....	EDUARDO FERRARA CRUZ
Organization.....	CRUZ ROJA MEXICANA
Address.....	MEXICO D.F
Telephone/Fax No.....	32324565
E-Mail/Others.....	
WEB Site.....	
<input type="button" value="Continue"/> <input type="button" value="Go Items"/> <input type="button" value="Exit"/>	

DESTINATION	
Modify consignment No....	001001
	<input type="button" value="Directory"/>
Recipient category.....	Civil Defense:NationalDisaster Committee
Name.....	MANUEL VEGA SALAS
Organization.....	NATIONAL DISASTER COMMITTEE
Address.....	56 PEACH STREET BALA CITY, SYLVANIA
Telephone/Fax No.....	438485956
E-Mail/Others.....	
WEB Site.....	
<input type="button" value="Continue"/> <input type="button" value="Previous screen"/> <input type="button" value="Exit"/>	

GENERAL INFORMATION	
Modify consignment No.....	001001
Mode of transportation.....	AA156
Shipment document.....	ASD323345
No. of pieces (Box/Bag).....	46
Estimated total weight Kg	>>>> 5,156 KG
Estimated total cost.....	16,000 \$ US Dollar USD: 16,000
Remarks.....	
<u>S</u> ave	Previous screen
Exit	

Remember that consignment identification involves three dialogue boxes: **POINTS OF ORIGIN**, **DESTINATION** and **GENERAL INFORMATION**. If you do NOT wish to view or modify the data on any of these boxes, select **Continue**.



The **Go to Items** option saves you from going over the consignment identification dialogue boxes, taking you directly to the **Item Selection** dialogue box.

In order to view existing items, three options are available:

1. **View summary by category**
2. **View all items in the category.**
3. **View all items in the document.**

There is one option for modifying existing items:

1. **Modify selected item**

Consignment list (all)

When the user does not know the number of a given consignment, the query or modification may be effected by selecting **<Consignment List (all)>**. A list of consignments will be displayed. Find the one you are interested in and hit **<Enter>**. The program will present the following window, and you can scroll down until you find the item you are seeking and hit **<Enter>** to select it.

Consignment fields	Point of origin	Points of Origin:O
001001	México	CRUZ ROJA MEXIC
001002	México	CRUZ ROJA MEXIC
001003	Costa Rica	ACME

Consignments list (Parameters)

You can search for a given consignment by defining parameters such as a range of arrival dates, the name of the sender, or the intended recipient. When looking items up by parameter, a dialogue box will appear, including two main fields:

- Date range: initial date and final date.
- Sender and/or Recipient.

For instance, if you are interested in finding out which supplies have been sent by the government of Venezuela to the local Ministry of Health within a given time frame (say, since the emergency started), the dialogue box will look like this:

CONSIGNMENT LIST (PARAMETERS)

DATE OF CONSIGNMENT D/M/Y

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

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

Points of Origin..... All

Destination..... All

OK Cancel

Once you define the query parameters and click on <OK>, the program will show you a list of the selected items. If you do not have a particular time frame in mind, simply leave the date fields empty and hit <Enter> until you reach the field you are interested in. You may also look up all senders or recipients by selecting **All** in the respective fields.

Items by category

Sometimes it is important to determine whether a particular type of item has come in, in what quantity, and who has it. For instance, it might be necessary to find out if rice or another type of grain has come in, or whether there are enough antibiotics or building materials. Hence the **Items by Category** option. Use it to carry out selective queries concerning all the consolidated consignments, looking for a specific item or sub-category. When you choose this option, you will see the following dialogue box:

The image shows a dialog box titled "ITEMS BY CATEGORY". Inside, there is a section labeled "SELECT FILTER PARAMETERS". This section contains three rows of input fields:

- Category:** A dropdown menu currently showing "Pharmaceutical" and "Yes".
- Subcategory:** A text box containing "All" and a small square button to its right.
- Item:** A text box containing "All" and a small square button to its right.

At the bottom of the dialog box are two buttons: "OK" and "Cancel".

The choice of the item or items of interest is carried out following the same three-level classification procedure discussed in the introduction. When choosing subcategories or items the default option is **All**, which will display all the information recorded in that category or subcategory and respond to queries such as:

- What food has come in? (Choose **all** in the subcategory).
- What types and quantities of grains have come in? (Choose **Grains** in the subcategory and **all** in "item").

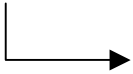
Or you can make specific queries such as:

- How much rice has come in and who has it?

Regardless of the type of query, the program presents a dialogue box similar to the ones above, showing information about the subcategory, item, quantity, presentation unit, date of entry, source, and consignment number. To scroll through the information you have two options:

- Move the various fields (columns) of a given record. You can move towards the right with the <TAB> key, or towards the left by pressing at the same time <SHIFT><TAB>, or
- Changing the data visualization mode by pressing <CONTROL> and <W> at the same time. The window that pops up should look like this:

Information about an item in a specific consignment



Category..... Food and Drink			
Subcategory..... All			
Item..... All			
Items by category - Food and Drink			
Subcategory	Item	Quantity	Remaining
Cereals/Grains/Tuber	Beans	540	540 Ba
Cereals/Grains/Tuber	Rice	5000	4800 Ba
Cereals/Grains/Tuber	Rice	4000	4000 Ba

To move between records use the Up or Down Arrow Keys to advance one record at a time, or <PgDn> and <PgUp> to advance one screen at a time.

If you press the <ESC> key, the program allows you to produce a report on the query. The following window will appear:

Page Preview

<i>HUMANITARIAN SUPPLY MANAGEMENT SYSTEM</i>							
<i>ORGANIZATION: RED CROSS</i>							
<i>ITEMS BY CATEGORY - FOOD AND DRINK</i>							
Country affected	Honduras						
Place and date	THE ENTIRE COUNTRY						
Type/Name of disaster	HURRICANE MITCH						
Category	FOOD AND DRINK						
Subcategory	ALL						
Item	ALL						
Subcategory	Item	Total quantity	Quantity	Presentation unit	Points of	Priority	Temporary
Cereals/Grains/Tuber	Beans	540	540	Bags	ACME	Immediate distributi	Alimentos
		540	540				
Cereals/Grains/Tuber	Rice	5,000	4,800	Bags	CRUZ	Immediate distributi	Alimentos
Cereals/Grains/Tuber	Rice	4,000	4,000	Bags	CRUZ	Immediate distributi	Alimentos
		9,000	8,800				

OK
Next
Previous
Page 1
Zoom In
Zoom Out

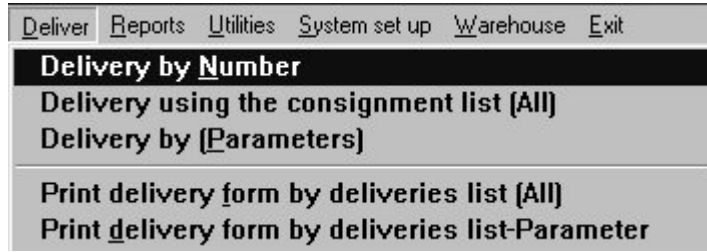
You can view the report on the screen, and press <ESC> when you are done. Alternatively, if you choose <OK>, a new dialogue box will appear to ask you if you want the report sent to the printer.

If you decide to print the report, make sure that the printer is plugged in and ready to print. Otherwise, the program will display an error message.

Details about reports will be discussed later in a later chapter.

6. Consignment deliveries

The Field Unit generally handles the delivery of consignments to their intended recipients, but the Central level can also do it by using the options on the DELIVERIES pull-down menu. The mouse or keyboard can here be used in the same way already described in previous chapters. The options in this menu are the following:



Delivery by consignment number

When you select this option, the program will open a window where you can enter the consignment number. If the number matches an existing consignment, you will see on screen a summary of key data about the consignment, such as the sender, the intended recipient, and the general information that was entered when creating the record:

DELIVER CONSIGNMENT	
POINTS OF ORIGIN	
Consignment No.....	001002
Date of Consignment D/M/Y.....	21/03/2000
Point of origin.....	México
Organization.....	CRUZ ROJA MEXICANA
DESTINATION	
Name.....	MANUEL VEGA SALAS
Organization.....	CNE
GENERAL INFORMATION	
Mode of transportation.....	AA156
Shipment document.....	ASD54355
<input type="button" value="Deliver"/> <input type="button" value="Exit"/>	

If the number does not match any existing consignments, you will get an error message.

If you choose Yes, the delivery will be recorded and the system will immediately present an on-screen report on the delivery. If you now press ESC or click on OK, a dialog box will ask you if you wish to see the report on screen or would prefer to print it.

OUTPUT TO:

Send to printer
 See on screen

REF:DELPRINT/DELPRINT

If you would like to print the report, choose **Sent to Printer**, then **OK**.



Before starting to print, make sure that the printer has enough paper, and that it is on and ready to print (i.e., that it is “online”). Otherwise, the program will display an error message. If, when you correct these errors, the printer still does not respond, check the parallel cable that joins the computer and the printer

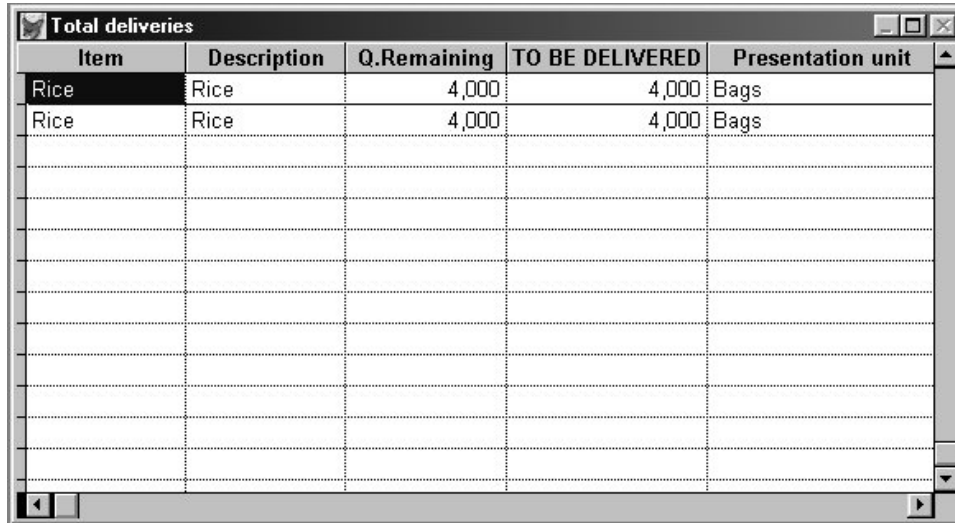
Total deliveries

Full or complete deliveries apply when the full consignment will be delivered to the same recipient.

TYPE OF DELIVERY

Partial deliveries
 Total deliveries

If you choose Total Delivery, the system will display a new window with all the available items in the consignment and will automatically update the Remaining Quantity field.



Item	Description	Q.Remaining	TO BE DELIVERED	Presentation unit
Rice	Rice	4,000	4,000	Bags
Rice	Rice	4,000	4,000	Bags

The previous window shows that the delivery has been made in full, and *may no longer be edited*. No changes can be made, since the system has already allocated all available items in this consignment.

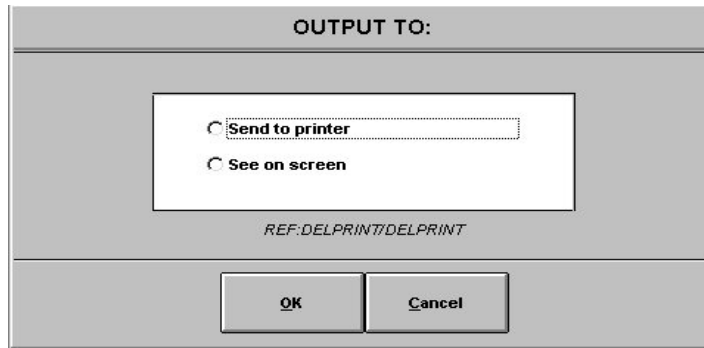
If you now press ESC, the following dialogue box will appear:



If you choose the No option, the delivery will be immediately cancelled and you will return to the Main Menu.

If you choose the Cancel option, you will return to the previous window to make changes or corrections.

If you choose Yes, the delivery will be recorded and the system will present an on-screen report of the delivery. If you now press ESC or click on OK, a dialog box will ask you if you wish to see the report on screen or would prefer to print it.



If you wish to print the report, choose **Sent to Printer**, then **OK**.



Before attempting to print, please make sure the printer is on, has enough paper, and is ready to print (i.e., it is “on line”). Otherwise, the program will show an error message. After checking or fixing any of these problems, if the printer still does not respond, verify that the parallel cable is properly attached to the computer and the printer.

Delivery using the consignment list (all)

The difference between this procedure and the previous one lies in the way the data are accessed. In the first instance, queries are based on the consignment number. When working with the list, you will select the items based on their supplier or place of origin. From this point, all the steps to be followed to enter the delivery information and print the receipt are the same.

list of all donor organizations or recipients. If you select one, you will see a new window with the result of the search. If nothing matches your search, a warning message will appear. Take the same steps already mentioned above in the passages on the different types of deliveries.

Print delivery form by deliveries list (all)

Every time you authorize a partial or complete delivery, the program stores the information about that delivery so as to keep track of past deliveries and current stock. When this option is selected, you will see on screen a summary of all deliveries made so far.

Consignment fields	Delivery No.	Date of this delivery	Date of entry D/M/Y	Time of entry	Des
001001	000001	22/10/1999	22/10/1999	15:53:30	Ca
001001	000002	27/03/2000	27/03/2000	11:39:23	Ca
001001	000003	30/05/2000	30/05/2000	09:39:04	Ca
001001	000004	30/05/2000	30/05/2000	09:41:24	Ca
001001	000005	30/05/2000	30/05/2000	09:55:14	Ca
001002	000001	30/05/2000	30/05/2000	10:01:28	Ca
001002	000002	24/07/2000	24/07/2000	14:59:42	Ca
001002	000003	24/07/2000	24/07/2000	15:04:56	Ca

If you are only interested in a specific delivery, look for it on the list and highlight it with the mouse or by hitting Enter. You will see a window with the delivery identification information described earlier.

DELIVERY FORM	
POINTS OF ORIGIN	
Consignment No.....	001002
Date of Consignment D/M/Y.....	21/03/2000
Point of origin.....	México
Organization.....	CRUZ ROJA MEXICANA
DESTINATION	
Name.....	MANUEL VEGA SALAS
Organization.....	CNE
GENERAL INFORMATION	
Mode of transportation.....	A.A156
Shipment document.....	ASD54355
<input type="button" value="Continue"/> <input type="button" value="Exit"/>	

DELIVERY FORM	
Consignment No.....	001002
Delivery No.....	000002
Date of this delivery.....	24/07/2000
Destination.....	Campamento Uno
Sent by.....	CNE
Driver Name.....	Thomas
I.D.....	22232456
License plate number.....	
Details of authorization.....	Aut. No. 7898
Remarks.....	
<input type="button" value="Continue"/> <input type="button" value="Exit"/>	

When you click on <Continue>, the program will produce a report with information about the delivery, which may be checked onscreen or after printing,

HUMANITARIAN SUPPLY MANAGEMENT SYSTEM			
ORGANIZATION: RED CROSS			
DELIVERY FORM 000002 CONSIGNMENT NO. 001002			
Country affected	Honduras		
Place and date	The entire country		
Type/Name of disaster	Hurricane Mitch		
Date of this delivery	24/07/2000		
Date of entry D/M/Y	24/07/2000		
Time	14:59:42		
Destination	Campamento Uno		
Sent by	CNE		
Transport I. D.	Thomas		
I.D.	22232456		
License plate number			
Details of authorization	Aut. No. 7898		
Remarks			
Category	Item	Quantity	Presentation unit
Food and Drink	Rice	800	Bags
RECEIVER'S SIGNATURE			
Witness No. 1			
Witness No. 2			

If you press ESC or click on the OK button, you will have three options:

1. Print the delivery form.

2. Continue seeing it on-screen.
3. Transfer the delivery data to a diskette, which may be forwarded to a warehouse (more on this later).

Print delivery form by delivery list-parameters

This option allows you to print out a delivery form by locating the delivery by date and recipient.

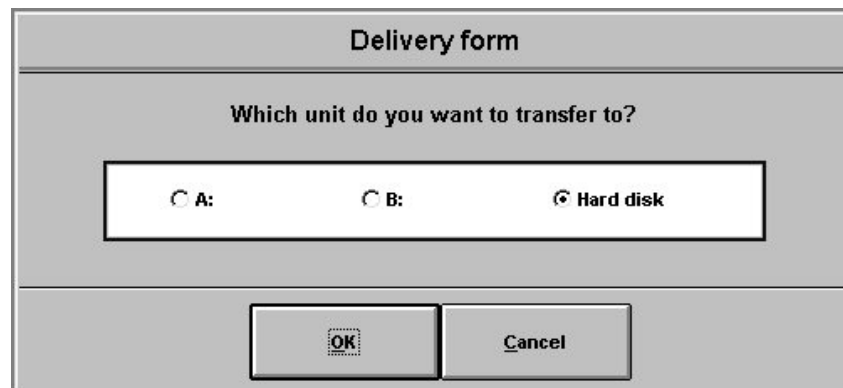
Transferring delivery data to the WAREHOUSE MANAGEMENT Module

The WAREHOUSE MANAGEMENT Module is the tool used to manage the supply received by the Field Units or incorporated into the SUMA CENTRAL Level, in order to allow recipients to keep track of the distribution of supplies and the available stocks.

Accordingly, every time a consignment is delivered, the program enables the user to record the information on a floppy disk so other users do not have to input the same information manually elsewhere. In addition, the disk is sent with an attached printout as additional security, in the event the disk should have bad sectors or is otherwise unreadable.

The procedure to follow is this one:

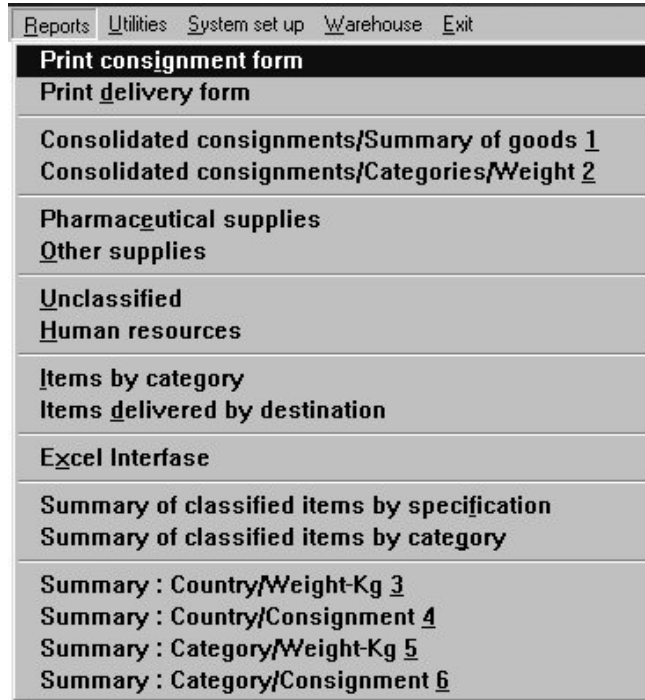
1. Select the delivery information to be transferred by following the same steps outlined above for < Print Delivery form by Deliveries List (all)>.
2. After seeing the form onscreen, press ESC. In the dialogue box that asks if you want the form printed, choose Cancel. The system will open up a dialogue box for you to decide which disc unit will be used for data transfer.



3. Verify that the diskettes are formatted and have no files.
4. Insert the diskette into the A: or B: unit.
5. Follow the onscreen instructions.

7. Reports

The Reports pull-down menu allows you to produce printed reports. The options available are the following:



Before printing your report, make sure that your printer is connected to the computer, that it has paper, and that it is ready to print (online).

Broadly speaking, all reports have the same format, which we have already discussed in the section on Consignment Deliveries.

OUTPUT TO:

Send to printer
 See on screen

REF:CONPRIN2/CONPRIN2

SUMA's reports can either be sent to the printer or reviewed on screen. In the latter case, you will get a preliminary report. Generally speaking, all reports are first seen on screen, and the users can then proceed to print the documents if they so desire.

Consolidated consignments

This print report is a summary that identifies all the consignments consolidated so far by SUMA CENTRAL. It includes information about the sender, the recipient, the items in the consignment and their category (pharmaceuticals, etc.), and the condition of the items upon delivery.

CONSOLIDATED CONSIGNMENTS/SUMMARY OF GOODS

SELECT FILTER PARAMETERS

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

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

Point of origin..... << ALL >>

Donor category..... << ALL >>

Points of Origin..... << ALL >>

Destination..... << ALL >>

Delivered/Not delivered..... << ALL >>

Reception sites..... << ALL >>

This report makes it possible to summarize by category all consignments that have arrived.

Report-selection filters allow you to select **All** Options, which is the default, or else specific types of information. In the on-screen example, users can select all consolidated consignments, those that have been delivered, or those that have not yet been delivered.

Consolidate consignments categories/weight

This report is similar to the previous one, except that it produces a summary of the total weight in Kg of the supplies in each main category.

Pharmaceutical supplies

This report shows each of the pharmaceutical items included in the consignments received over a given period by the Field Units. You may select the range of dates by picking a starting date and an end date, and use other parameters to obtain additional information, as can be seen in the following screenshot.

The way to select your parameters and manage the various fields is similar to that of the previous reports.

Other supplies

This report shows the non-pharmaceutical supplies entered into the various categories. If in the **Category** field you choose **<<All>>**, the report will include information about all the categories except for drugs. If, on the other hand, you select a specific category, you will only see the records for that category.

NON-MEDICINE SUPPLIES

SELECT FILTER PARAMETERS

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

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

Point of origin..... << All >>

Donor category..... << All >>

Category..... << All >>

Subcategory..... << All >>

Item..... << All >>

OK Cancel

Items by category

This option is very similar to the one of the same name in the Field Unit module. You select the category, subcategory, and item through a parameter definition dialogue box. The difference is that in SUMA CENTRAL, similar units of common item are added up, presenting the total consignments received in that category.

ITEMS BY CATEGORY

SELECT FILTER PARAMETERS

Category..... Pharmaceutical

Subcategory..... All

Item..... All

OK Cancel

Excel interface

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

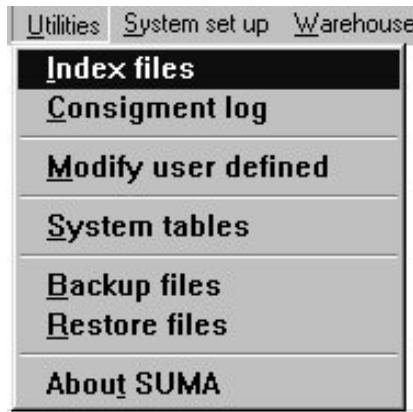
Data to translate	File Name
<input checked="" type="checkbox"/> Consignment	FILEXCEA
<input type="checkbox"/> Consignment - Pharmaceutical	FILEXCEB
<input type="checkbox"/> Consignment - Other supplies..	FILEXCEC
<input type="checkbox"/> Consignment - Unclassified	FILEXCED
<input type="checkbox"/> Consignment - Human resources	FILEXCEE
<input type="checkbox"/> Delivery	FILEXCEF
<input type="checkbox"/> Delivery - Pharmaceutical	FILEXCEG
<input type="checkbox"/> Delivery - Other supplies	FILEXCEH
<input type="checkbox"/> Delivery - Unclassified	FILEXCEI

Continue Cancel

In the previous dialogue box, you can select which files you want to generate by “marking” the small checkbox at left. Please note that the names of the files are predetermined. The files generated will remain in the folder where SUMA CENTRAL is installed on your hard disk, for instance **C: \SUMACW51**.

8. Utilities

SUMA Utilities are commands included in the program to solve specific problems. Think of them as an emergency toolbox. The *Utilities* menu includes the following options:



Index files

This command allows you to give maintenance to the indices of the files in the database. That is, the indices are reorganized, as if they were the content of a paper folder. Anytime you notice a problem in the operation of the program, such as disorganized listings, empty fields, or a slowdown in performance, you should consider this option. The **Index Files** utility is activated automatically every time you restart the program.

Consignment log

This utility allows the program administrator to determine the names of the people who have entered any given record, based on their username, as well as the date in which the record was entered.

The following image shows the two dialogue boxes needed to carry out this query.

The screenshot shows a dialog box titled "CONSIGNMENT LOG". It contains the following fields and options:

- From date (DD/MM/YY)**: Input field with " / /"
- To date (DD/MM/YY)**: Input field with " / /"
- Select user**: Dropdown menu with "All" selected. The dropdown list is open, showing "All", "GABRIEL VENEGAS", and "Módulo Suma Central".
- Select reception sites**: Empty dropdown menu.
- Buttons**: "OK" and "Cancel" buttons at the bottom.

As you can see, the main dialogue box allows you to select a range of dates, the specific program user, and the reception site. Alternatively, you can select all of them.

Modifying user-defined supplies

User-defined supplies are a tool provided by SUMA to classify a supply that is not included in the predefined item lists.

Sometimes, due to a search error, the program user creates a user-defined supply even though it does appear on the list, causing duplications that may affect future queries. SUMA CENTRAL enables you to modify them in order to eliminate duplication or ensure more appropriate classification. When you select this option, the program shows a list of all the items defined by the various users.

System tables

Every time SUMA CENTRAL is configured, the program allows you to add, eliminate or edit the headings or options included in the system tables. For instance, you may modify the name of an item by choosing to call a truck, say, a lorry.



Please do no attempt to use this option before you are thoroughly familiar with the program and you are fully aware of what you intend to do and why.

The first alternative offered by the program is selecting the language in which the tables will be presented. After choosing English, for instance, the following dialogue box will appear.

<input checked="" type="radio"/> General tables <input type="radio"/> Level <input type="radio"/> Pharmaceutical products <input type="radio"/> Other supplies			
<input checked="" type="radio"/> Places <input type="radio"/> Currencies <input type="radio"/> Donors/Cons. <input type="radio"/> Labels	<input checked="" type="radio"/> Categories <input type="radio"/> Subcategory <input type="radio"/> Items	<input checked="" type="radio"/> Form <input type="radio"/> Route <input type="radio"/> Strength	<input checked="" type="radio"/> Units <input type="radio"/> Factor
<input type="button" value="Add"/>	<input type="button" value="Edit"/>	<input type="button" value="Print"/>	<input type="button" value="Exit"/>

General tables

Enables you to add or edit new reception sights, currencies, donor or recipient categories, and the program's title table—all the labels or titles that appear in all the dialogue boxes used by the program to assist the user.

Level

This refers to the classification level. You may add or edit new categories, subcategories, or items.

Pharmaceutical

Enables you to modify the information related to form of intake, concentration, and presentation of a pre-included drug or a newly added one.

Other supplies

Enables you to provide maintenance to the presentation units of all supplies that are not pharmaceutical.

Protecting Information

In the introduction to this manual, we saw the importance of protecting the data that have been fed into the program. There are two key options involving this: **File Backup** and **File Restore**.



You must be careful when you use these tools!!

Using file backup

1. Select in the dialogue box the storage capacity of the diskettes you will be using for backup. They are generally either 360 KB or 1.2 MB for 5 ¼" diskettes, or 720 KB or 1.44 MB for 3 ½" diskettes.
2. Select the disk drive, A: or B:.
3. Verify that the diskette is the right kind, that it is blank, that it has been formatted, and that it has been placed in the correct drive. Once you are certain of this, place the cursor over the **<Agree>** option and hit **<ENTER>**.
4. After the backup is complete, a message to that effect will appear and you will return to the main menu. If the process failed, you will see an error message.



Depending on the amount of information stored and the capacity of the drive, you may need more than one diskette. Have several diskettes ready, blank and formatted, just in case. Label the diskette to identify it as a backup, and write down the date and time on the label.

In order to recover the backup data, use the **Restore Files** command.

1. Insert the diskette in the proper drive.
2. Select the drive in the dialogue box and hit <Enter>.

Wait until the transfer is complete. If it is successful, you will see a confirmation message and return to the main menu.