

Upazila Inventory Management System USER GUIDE



Prepared for



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Introduction

According to the Directorate General of Family Planning (DGFP)'s logistics supply procedure, the logistics supply or commodities flow (see Figure A) from the Central Warehouse (CWH) to the Regional Warehouses (RWHs) to the Upazila Stores. The Upazila Stores distribute directly to both Family Welfare Centers (where Family Welfare Visitors [FWVs] work) and Family Welfare Assistants (FWAs). From each of these points, service providers distribute directly to the acceptors. Information flows (see Figure B) back up through the system from the lowest level to the central level. FWAs fill out an MIS Form 1, which describes service and logistics data for the month, and submit the form manually to the Family Planning Inspector (FPI). An FPI manages five to six FWAs. FPI aggregates the service and logistics data and completes MIS Form 2, then submits the form manually to the Upazila Family Planning Store. FWVs complete MIS Form 3 and submit it to the Upazila Family Planning Store. In the Upazila Family Planning Store, the Store Keeper has to coalesce all of the reports to generate the field portion of MIS Form 7B. In addition, Store Keepers calculate their own stock position and produce the supply plan for supplying commodities to FWAs, FWVs, etc. On average, each Store Keeper has to work with 25–30 Forms to prepare Form 7B and the Supply Plan. Add to this the uncertainty in availability, the system's tight timeline, and all of the other Store Keepers' responsibilities and it is clear that the Store Keeper finds it very difficult to produce a quality report on schedule. Therefore, reducing effort at this level can have a positive impact on the overall system's performance.

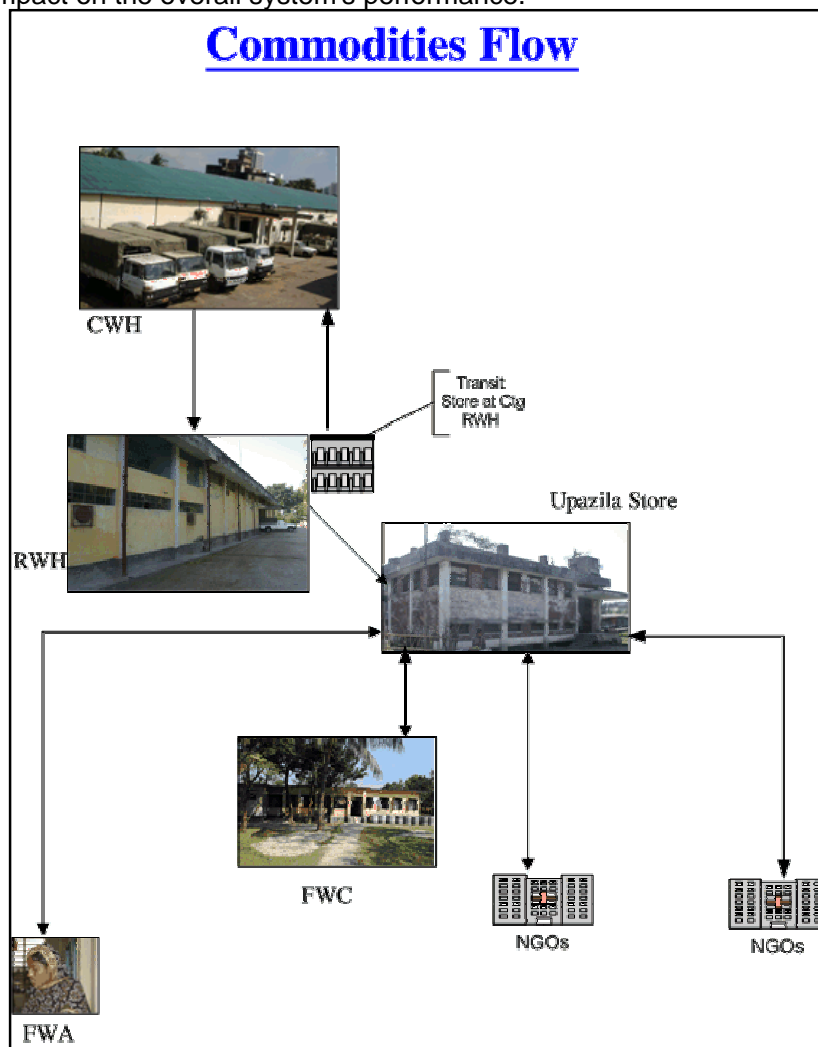


Figure A

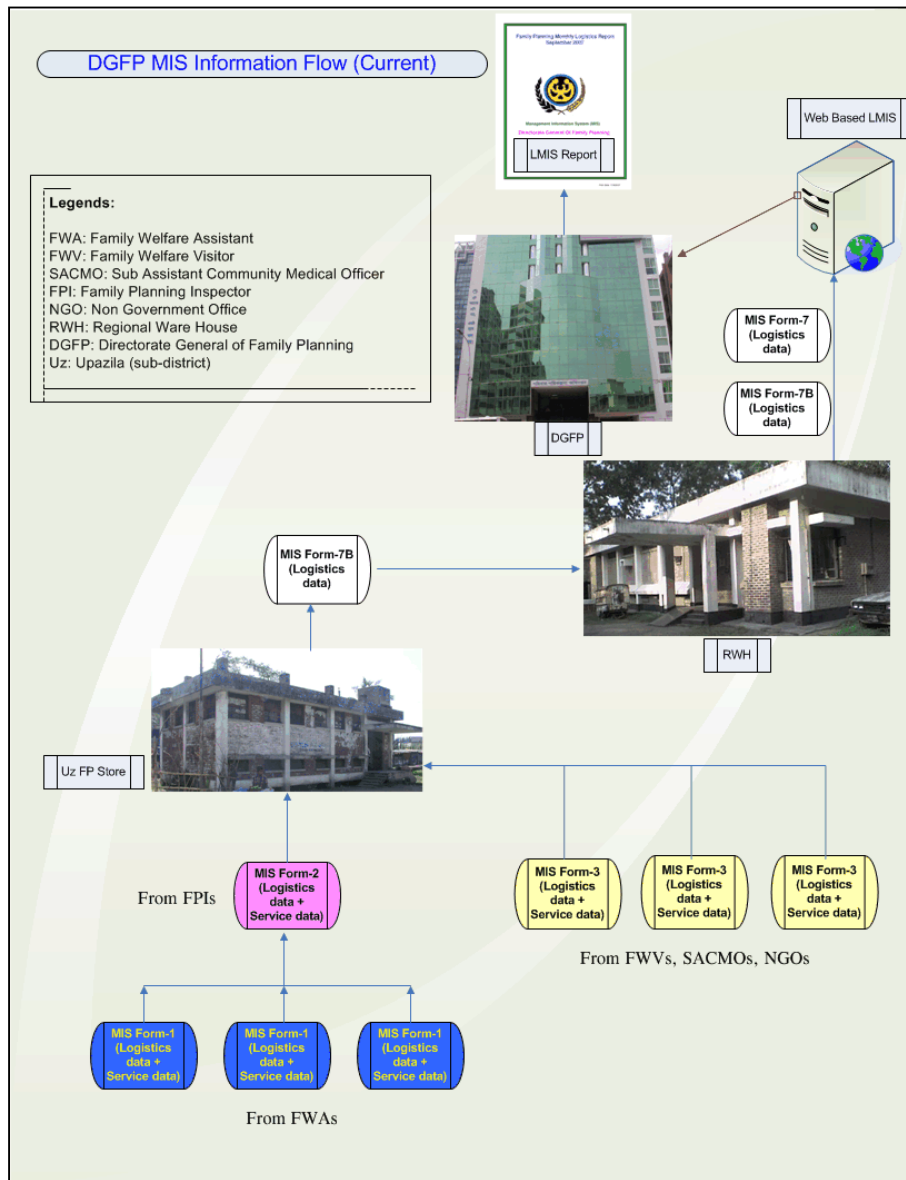


Figure B

Considering the above condition, an **Upazila Inventory Management System (UIMS)** has been developed to help the Upazila Family Planning Office, and especially the Store Keeper, by greatly reducing the latter's workload. This computerized system will maintain records for receipt and issue of commodities as well as product stock, whose saved records include batch number, manufacturing and expiry dates. In addition, the system can keep track of stock issued by the FEFO (First Expiry First Out) method and stock adjustment (expiry, damage, return from other facility, etc.). MIS forms 2 and 3 can be entered here. Finally, the system will generate Form 7B and Supply Plan automatically. In addition, the stock balance of commodities on any particular date can be determined at any time, as can a list of SDPs, a facility's transactions for a particular period, an item's transactions for a specific period, and dates when transactions took place, among others.

This software has been developed using Visual Basic 6 as the front-end tool, Crystal Reports 8 as the report tool, and SQL Server 2000 as the database.

Users and their Responsibilities

This software will be used primarily by the Upazila Family Planning Assistant (UFPA), the store (or whoever is in charge of it), and the Upazila Family Planning Officer (UFPO) (or whoever is in charge). Their respective tasks are as follows:

UFPO: The system administrator of this software, the UFPO is responsible for the following tasks:

1. Add new employees to the system with required permissions.
2. Add/delete/modify any new/existing Union or SDP to/from the system.
3. Add/delete/modify items to/from the Supply Plan; Forms 2, 3, and 7B; and employee designation.
4. Ensure the Store Keeper makes daily backups and keeps them in a safe place, e.g., on a pen drive/flash drive.
5. Ensure the software works smoothly in the upazila.

UFPA, store: The software is designed and developed to reduce the workload of this main user of the software. This person's primary responsibilities are as follow:

1. Enter MIS Form-2 and 3 accurately.
2. Issue/receive commodities to/from the SDPs/RWHs and print invoices.
3. Print Form 7B and the Supply Plan.
4. Print Stock Balance Report as required.
5. Make backups daily and keep them in a safe place, e.g., on a pen drive/flash drive .
6. Inform the UFPO about any problems with the software.



People at work in an Upazila FP Office



Inside an Upazila Store



An Upazila Store



Inside an Upazila Store

Chapter 1

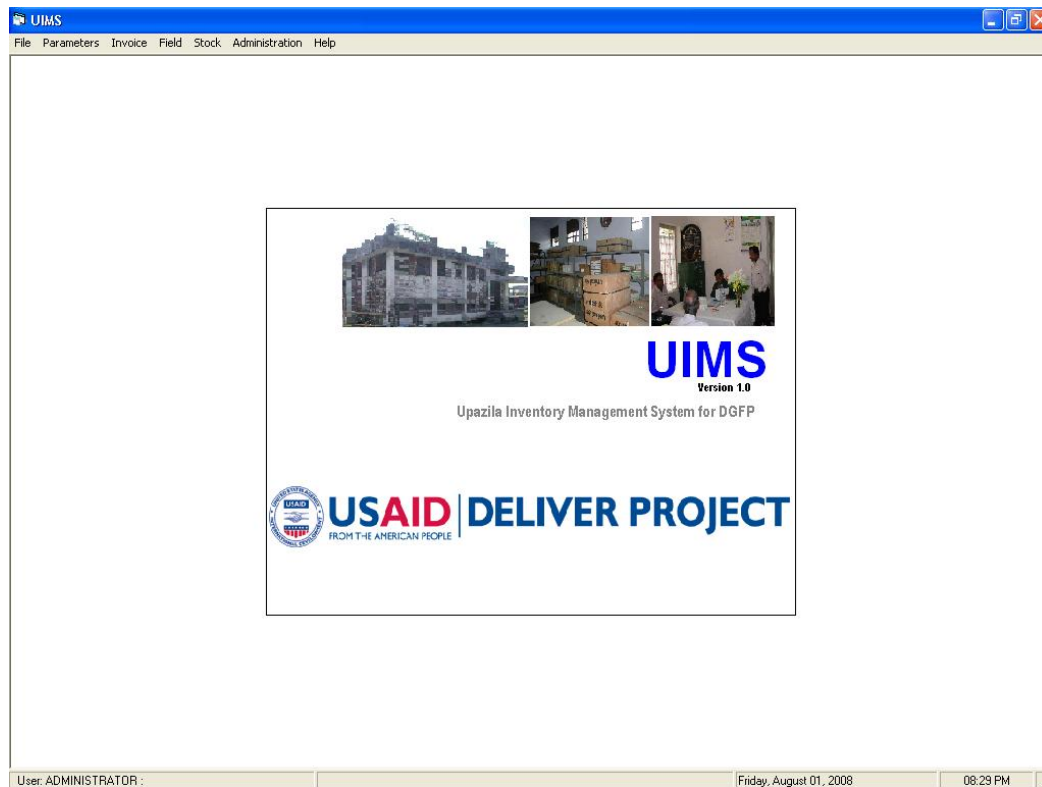
How to Operate the UIMS

1.1. How to start UIMS

- Double-click on the UIMS icon in your desktop, or
- Select Start > Programs > UIMS > UIMS from the taskbar to run UIMS.
- The following screen appears:

A screenshot of the UIMS Login dialog box. The title bar reads "UIMS Login". It contains two input fields: "User ID:" with the text "MIA" and a dropdown arrow, and "Password:" with masked characters "XXXXXXXXXX". Below the fields are two buttons: "OK" and "Cancel".

- Type your User ID and Password in the appropriate boxes and press <Enter> or click on OK.
- If your User ID and Password are correct, the UIMS main form will be visible.
- At the bottom left of the main form, you will see your User ID and Name.



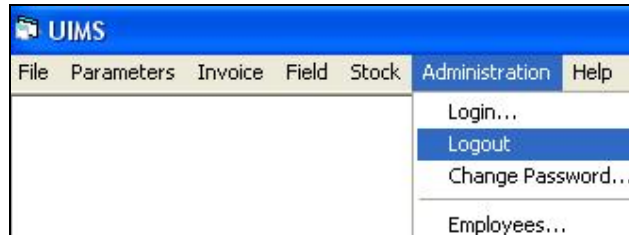
1.2. How to exit UIMS

- Select File > Exit from main menu bar, or
- Click on the topmost right X button to exit UIMS.

Note: Before you exit, make sure no forms are open.

1.3. How to log out

After your work is done and you temporarily want to suspend working with UIMS but do not want to Exit, then you should log out. This makes sure that another person cannot use UIMS without your permission when you are out. To log out from UIMS, select Administration > Logout from main menu bar.

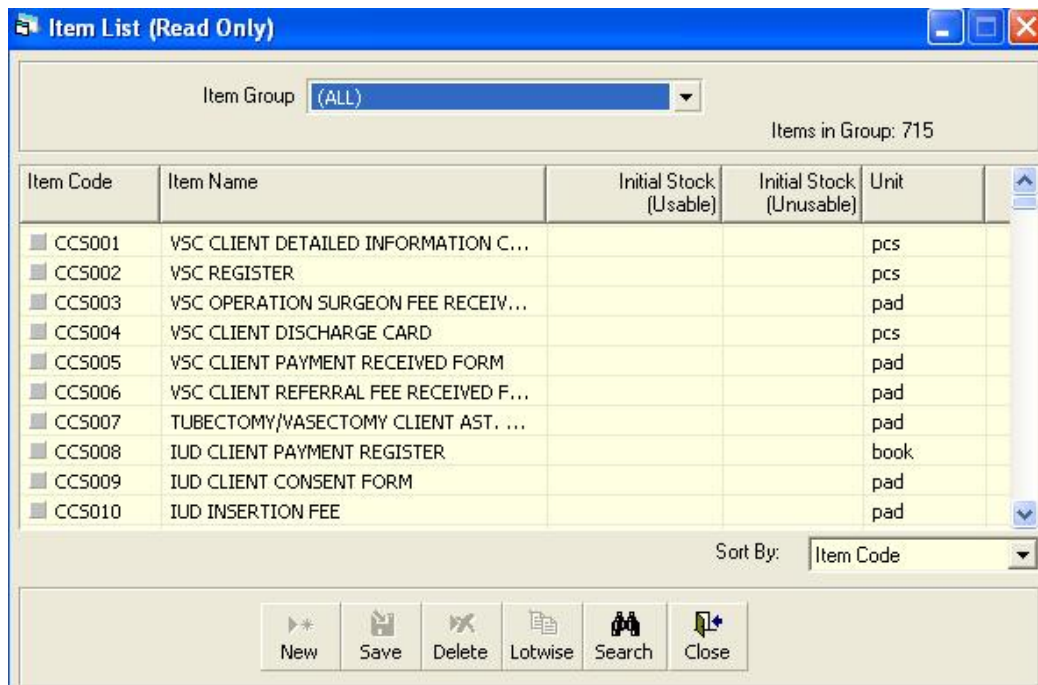


If you want to resume your work after logging out, log in again from Administration > Login menu.

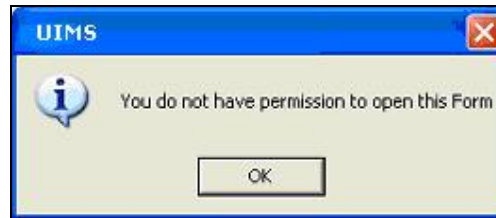
1.4. User permissions in Forms

Based on the permissions set by the Administrator, UIMS users are allowed to access only certain parts of the software. The Administrator uses three types of permissions to access the forms:

- *Edit*: Users with edit permission on any form are able to enter new data, edit data, delete data, and print in the specific form.
- *View*: Users with view permission will only be able to browse the data in the form but will not be able to edit. A typical form opened by a user with View access only appears below:



- *No permission:* If a user does not have Edit or View permission on any form and tries to open the form, the following error message appears:



1.5. How to change your Password

Every user has a User ID and Password provided by the Administrator. For security reasons, users can change their password at any time.

- Select Administration > Change Password from menu.
- Change Password form will be visible.
- The User Name box will show your logon user name.
- Provide your current password in Old Password box.
- Now enter the new password you want to use in the New Password and Confirm Password boxes.
- Click on OK to continue.

To check that the new password is in effect, log on again from Administration > Login dialog box.

1.6. Form elements and general editing guidelines

A typical entry form can be divided into three specific areas:

- *Block A:* This block generally consists of a list of IDs or names from which users can select a specific record to view its details.
- *Block B:* The data entry fields of a record make up this block.
- *Block C:* This block consists of a number of buttons to enter, edit, delete, and print the records.

Here is a list of common command buttons seen in UIMS:



Insert a new record of any type



Save the current editing



Delete the current record in a form



Preview a report before printing



Close any data entry form

Chapter 2

Parameters

2.1. Item Groups

The screenshot shows a window titled "Item Groups". At the top, there is a dropdown menu labeled "Item Groups" with "CONTRACEPTIVE" selected. To the right of the dropdown is the text "Total Item Groups: 8". Below this, there are two input fields: "Group Code" with the value "CON" and "Group Name" with the value "CONTRACEPTIVE". At the bottom, there is a toolbar with six buttons: "New", "Save", "Delete", "Preview", "Items", and "Close".

Store commodities are classified into a number of groups. Each group has a unique Group Code and a descriptive Group Name. Normally, Group Codes are three characters in length and abbreviated from their descriptive name.

2.1.1. View Item Groups

- Run UIMS.
- Select Parameters > Item Groups from menu.
- The Item Groups form appears.

2.1.2. General description of Item Groups form

The screenshot is annotated with three callout blocks:

- A**: A green circle pointing to the "Item Groups" dropdown menu.
- B**: A red circle pointing to the "Group Code" and "Group Name" input fields.
- C**: A purple circle pointing to the toolbar buttons.

This form is used to edit, create, delete, and print Item Groups. Controls in the form are grouped into three blocks:

- A. *Item Groups*: Shows a list of current Item Groups in database; a label below shows the total number.
- B. *Entry Fields*: To describe a group, two fields are required.
 - Group Code—A three-digit alphanumeric code that can represent the group.


- Group Name—A descriptive name for the group.
Both of these fields are compulsory.

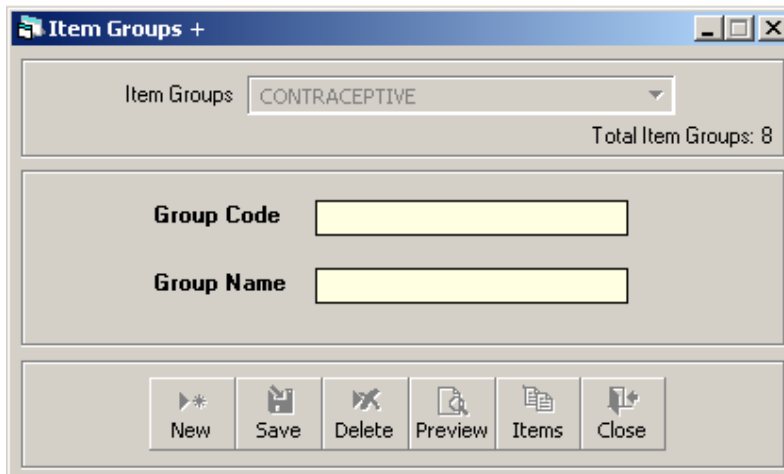
C. *Command Buttons*: Buttons available to manipulate Item Groups.

2.1.3. View information about a specific group

- Select the group you want to view from Item Groups list.
- Group Code and Group Name of the corresponding group will be shown.

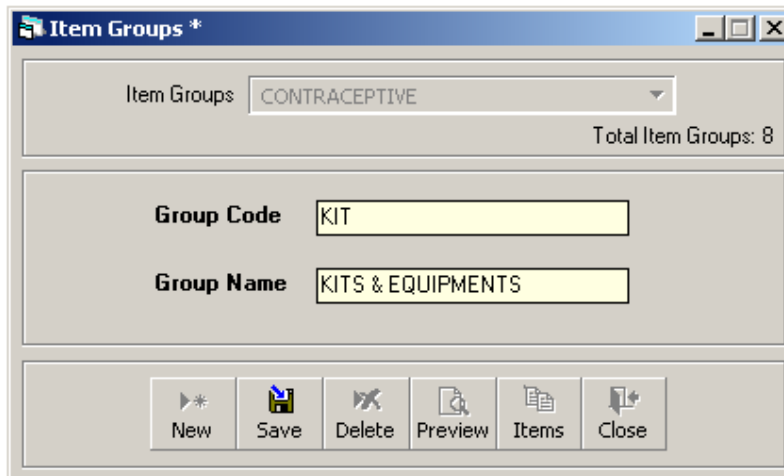
2.1.4. Enter a new group

- Click on  in the command buttons block, and the following form appears:




The screenshot shows a dialog box titled "Item Groups +". At the top, there is a dropdown menu labeled "Item Groups" with "CONTRACEPTIVE" selected. To the right of the dropdown, it says "Total Item Groups: 8". Below this, there are two text input fields: "Group Code" and "Group Name", both of which are currently empty. At the bottom of the dialog, there is a row of six buttons: "New" (with a right-pointing arrow and a star), "Save" (with a floppy disk icon), "Delete" (with a trash can icon), "Preview" (with a magnifying glass icon), "Items" (with a document icon), and "Close" (with a window icon).

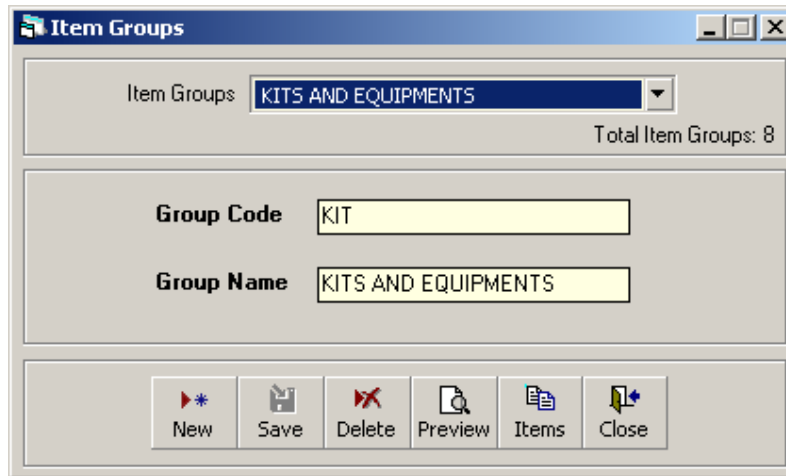
- Enter a three-character Group Code.
- Enter a descriptive Group Name.



This screenshot shows the same "Item Groups" dialog box, but now it is titled "Item Groups *". The "Group Code" field now contains the text "KIT" and the "Group Name" field contains "KITS & EQUIPMENTS". All other elements, including the dropdown menu and the command buttons, remain the same as in the previous screenshot.

- Click on 

- Your new group name is visible in the Item Groups list.




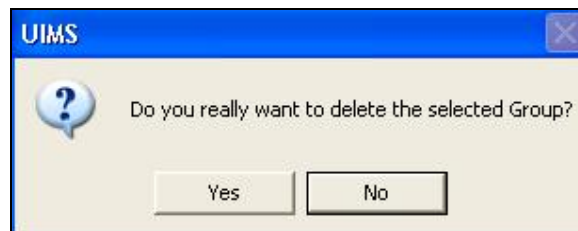
- If your new group code matches that of an existing group, an error message is shown. Change the group code and click on Save again.
- If the new group name conflicts with an existing group, an error message is shown. Change the group name and click on Save again.
- If you want to cancel the new Item Group entry, press Esc during editing to undo.

2.1.5. Edit an existing group

- Select the group you want to edit from Item Groups list.
- Change the Group Code or Group Name field as needed.
- When done with editing, click on Save.
- If your group code matches an existing group, then an error message is shown. Change the group code and click on Save again.
- If the new group name conflicts with an existing group, an error message is shown. Change the group name and click on Save again.
- If you want to cancel the current editing, press Esc to undo the changes.
- It is only possible to change a Group Code when there are no items under the group.


2.1.6. Delete an existing group

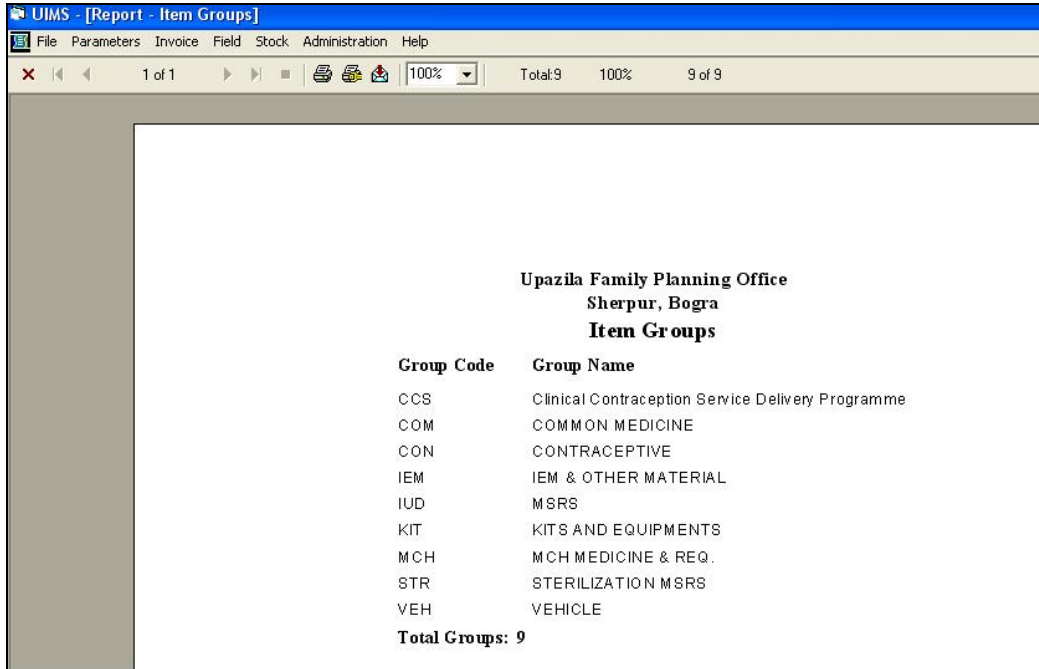
- Select the group you want to remove from Item Groups list.
- Click on  , and a confirmation dialog box appears:



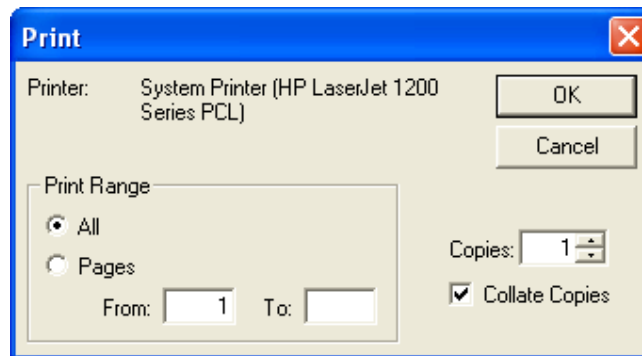
- Click on Yes if you really want to delete the group.
- You will not be able to delete groups that have items under them.

2.1.7. Print Item Groups

- Click on  to view a printable list of Item Groups.




- Click on the printer icon. The print dialog box appears:

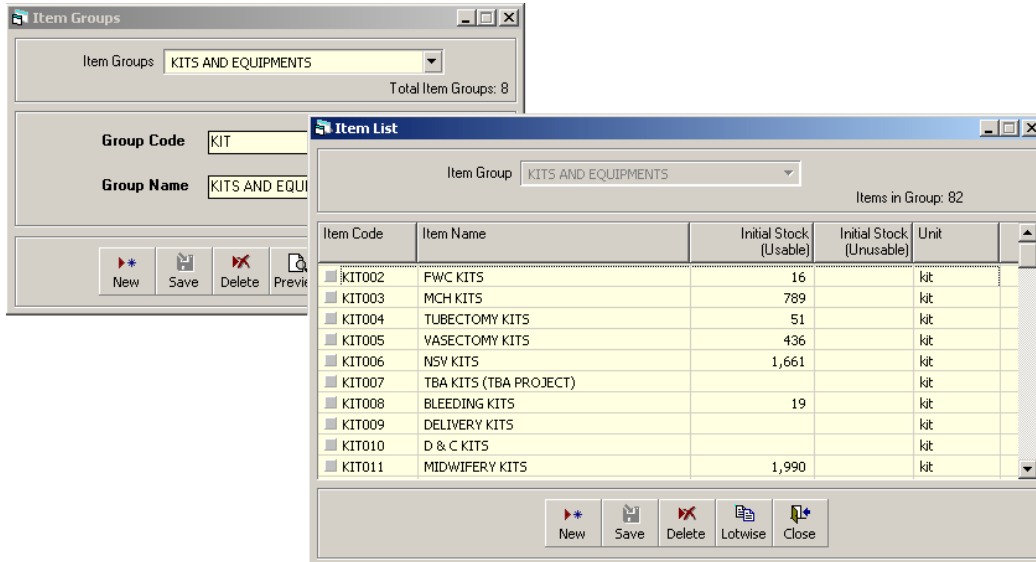


- Provide Print Range, Copies and click on OK. If you want to print only one copy of the whole report, then click on OK.
- After printing, click on the leftmost X button to close the preview window.




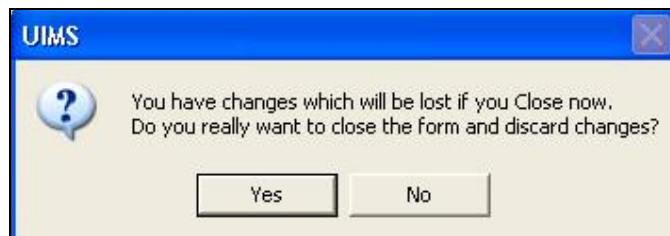
2.1.8. View items under each group

- Select the group from Item Groups list.
- Click on  to see the items under the selected group.



2.1.9. Close Item Groups form

- Click on  to exit the Item Groups form.
- You can also exit by clicking on the X button at the top right of the form.
- If you have unsaved groups when you attempt to exit, you will be informed that your changes will be lost if you exit:



- Click on Yes if you want to exit without saving. Click on No if you don't want to close the form at this time.

2.2. Item List

Item Code	Item Name	Initial Stock (Usable)	Initial Stock (Unusable)	Unit
COM001	ACITIC ACID			bottle
COM002	ADHESIVE TAPE - 3"			roll
COM003	AMBU BAG	884	5	nos.
COM004	APPRON UTILITY	95		pcs
COM005	APRONE PLASTIC			pcs
COM006	B.P. MACHINE	5,497		nos.
COM007	CAP. AMPICILLIN			capsule
COM008	FORCEP OBSTRETIC			pcs
COM009	INJ. ERGOMATRINE			amp.
COM010	INJ. HYDROCORTISON			amp.

Store commodities are classified into a number of groups. Every item has a distinct Item Code in the form of XXXYYY, where XXX is the Group Code and YYY is a sequence number. Every item has a distinct Item Name.

2.2.1. View Item List

- Run UIMS.
- Select Parameters > Item List from menu.
- The Item List form is displayed.

or

- Run UIMS.
- Select Parameters > Item Group from menu.
- Select an Item Group.
- Click on Items button to view the items of the specific group.


2.2.2. General description of Item List form

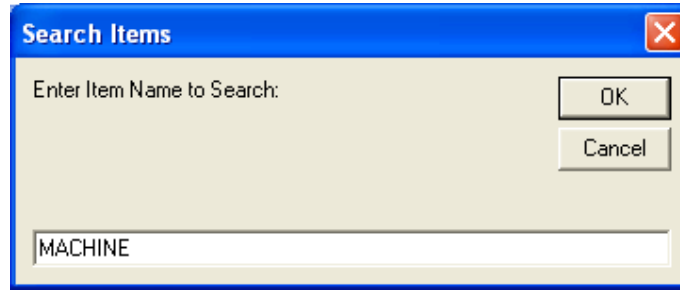
Item Code	Item Name	Initial Stock (Usable)	Initial Stock (Unusable)	Unit
COM001	ACITIC ACID			bottle
COM002	ADHESIVE TAPE - 3"			roll
COM003	AMBU BAG	884	5	nos.
COM004	APPRON UTILITY	95		pcs
COM005	APRONE PLASTIC			pcs
COM006	B.P. MACHINE	5,497		nos.
COM007	CAP. AMPICILLIN			capsule
COM008	FORCEP OBSTRETIC			pcs
COM009	INJ. ERGOMATRINE			amp.
COM010	INJ. HYDROCORTISON			amp.

This form is used to edit, create, delete, and print items. Controls in this form are grouped into three blocks:

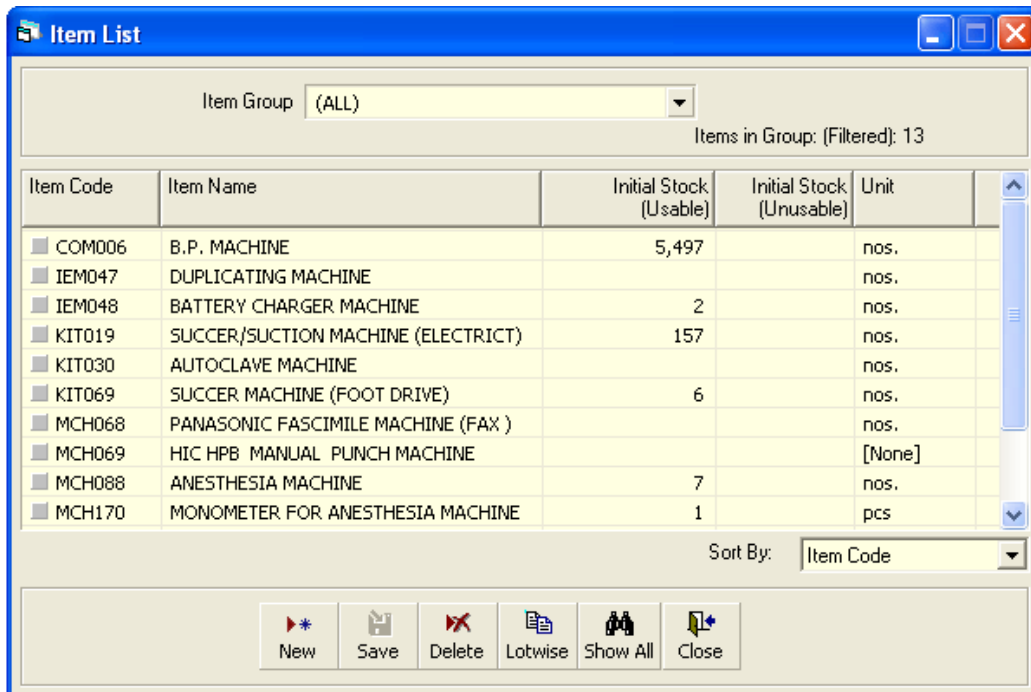
- A. *Item Group*: Shows a list of current Item Groups in the database. A label below shows the total number of items in the selected group.
- B. *List of Items*: Shows details about every item in the selected group. To describe an item, five fields are required.
 - **Item Code**: A unique six-digit code that can be used to identify the item. The code is generated automatically, but you can change it if you wish.
 - **Item Name**: A descriptive name for the item.
 - **Initial Stock (Usable)**: Initial stock that is available when we include the item in the inventory system.
 - **Initial Stock (Unusable)**: Initial unusable quantity of the item.
 - **Unit**: Unit of measurement of the item.
 Item Code, Item Name, and Unit fields are compulsory. Items can be sorted in the list by Item Code or Item Name, which is done through Sort By combo selection.
- C. *Command Buttons*: Buttons available to manipulate Item List.


2.2.3. Search and find an item

- Click on  in the command buttons Block C.
- A new dialog box appears asking you to give the name of the item to search. You can provide partial Item Name.



- After you provide the Item Name, click on OK.
- Items that match the search text are displayed in the list.



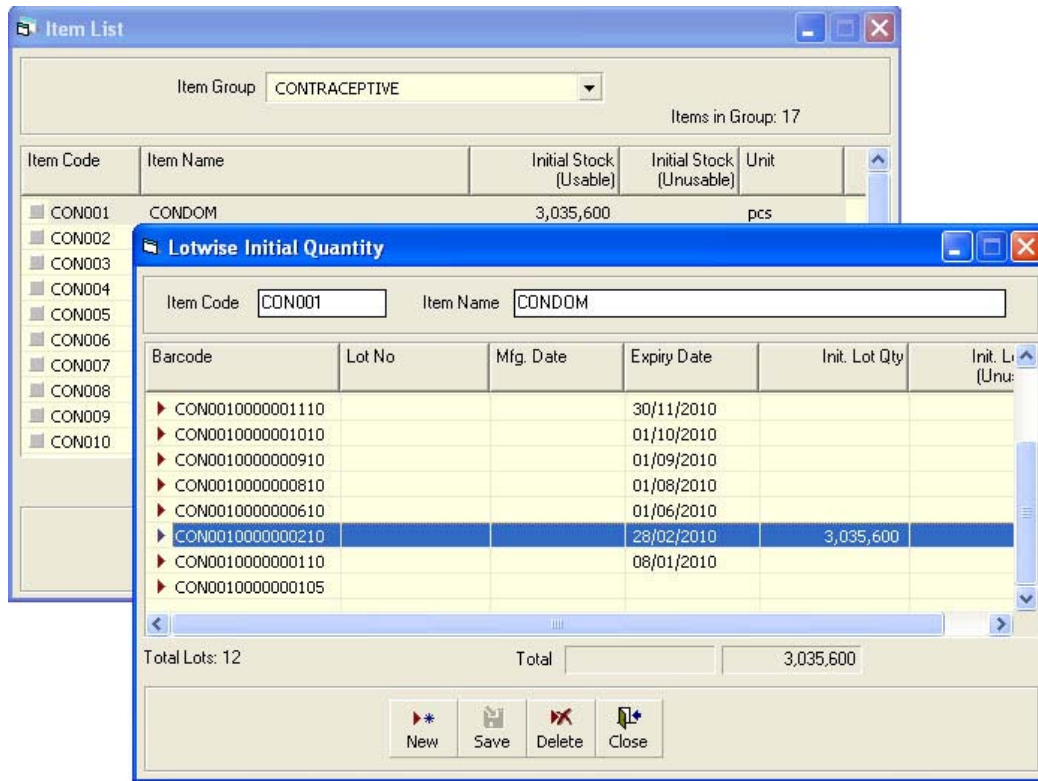
- To see all of the items again, click on  Show All

2.2.4. View information about a specific item


- Select the group of the item from Item Group list.
- All the items under the group will be shown in the middle list.
- Scroll through the list to find the item you are looking for.

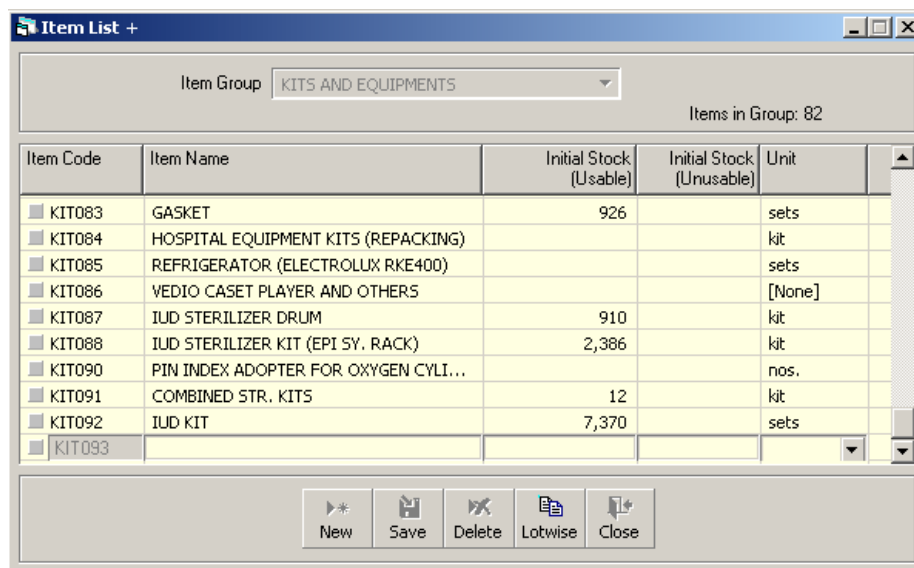
2.2.5. View Lotwise information about a specific item

- Select the item for which you want to view Lotwise information.
- Click on Lotwise in the command button block, and the following dialog box appears:



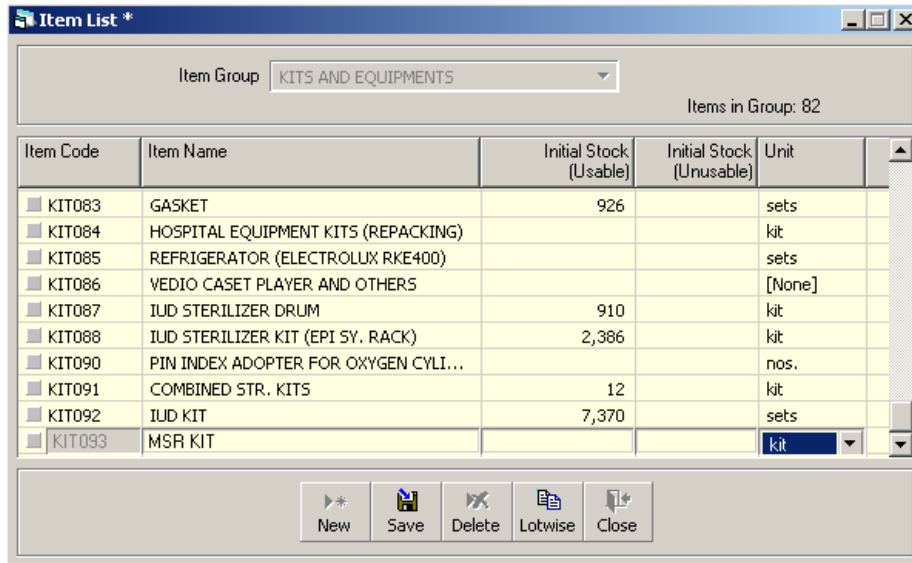
2.2.6. Enter a new item


Click on  from the command buttons block, and the following form appears:

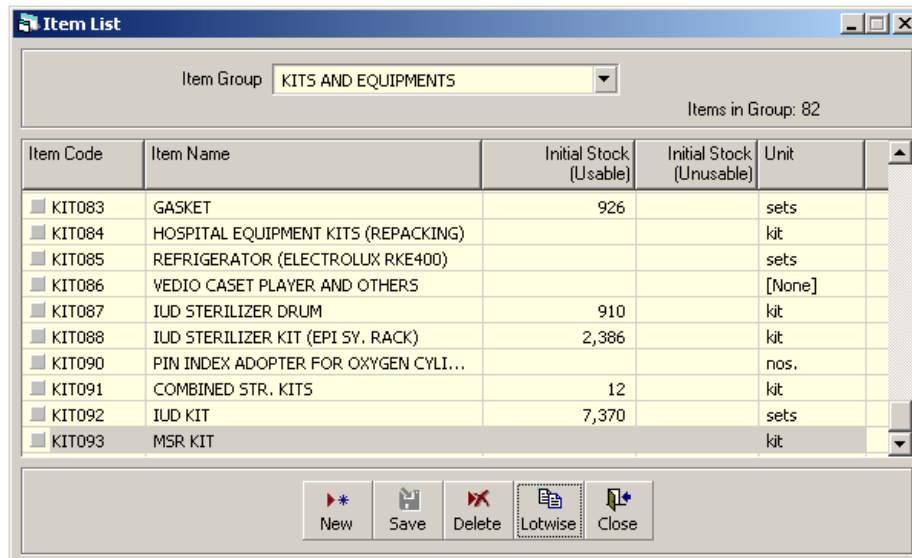


- The Item Code, which is generated automatically, consists of the group code and a number that is one greater than the maximum item code in the group. But you can change the Item Code to another Code that is not yet present in database.

- Enter the name of the item.
- If the item has initial stock in the inventory, then enter both Usable and Unusable quantity.
- Enter measurement unit of the item.



- Click on  , and your new item is highlighted in the list:




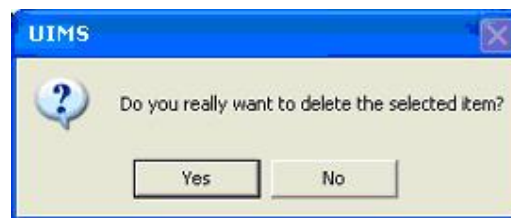
- If the new item name conflicts with an existing item name, then an error message will be shown. Change the item name and try saving again.
- If you want to cancel the new item entry, press Esc during editing to undo.

2.2.7. Edit an existing item

- Select the group under which the item is listed.
- Change the Item Name, Initial Usable Stock, Initial Unusable Stock, and/or Unit fields as required.
- When done with editing, click on Save.
- If the new item name conflicts with an existing item, then an error message will be shown. Change the item name and try saving again.
- If you want to cancel the current editing, press Esc to undo the changes.


2.2.8. Delete an existing item

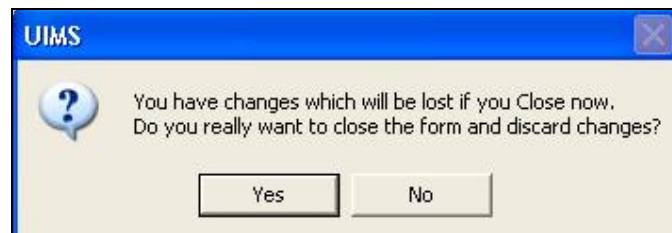
- Select the item you want to remove from Item list.
- Click on  , and a confirmation dialog box appears:



- Click on Yes if you really want to delete the item.
- You will not be able to delete items that have transactions (have been received/issued in the past).

2.2.9. Close Item List form

- Click on  to exit the Item List form.
- You can also exit by clicking on the X button at the top right of the form.
- If you have any unsaved item during exit, you will be informed that your changes will be lost if you exit.



- Click on Yes if you do want to exit without saving. Click on No, if you don't want to close the form at this time.

Chapter 3

Invoice

3.1. Local Purchase

When items are received from suppliers, they are logged into the system. This form is used when items are received from external supplier. Item quantities entered here add up to the total stock. This form is used to enter new receive invoices, edit, or print or delete old invoices.

3.1.1. Open Local Purchase form

- Run UIMS.
- Select Invoice > Local Purchase from menu.
- The Local Purchase form is displayed.

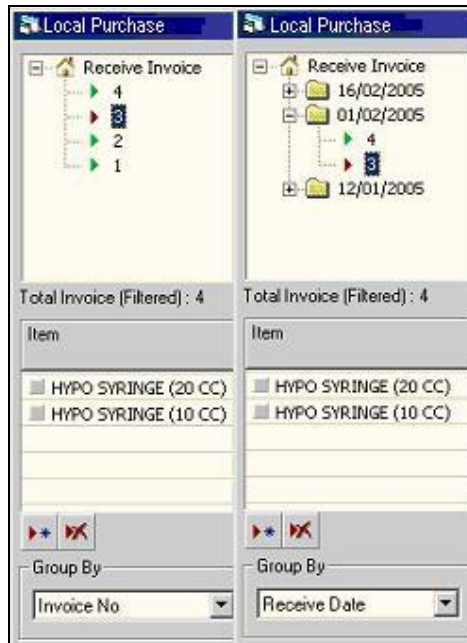
3.1.2. General description of Receive Invoice form

Item	Received Qty	Unit	Lot No	Mfg. Date	Expiry Date
BED SHEET	500	pcs			
1ML. DISPOSABLE SYRINGE	2,000	pcs			
2ML. DISPOSABLE SYRINGE	400	pcs			

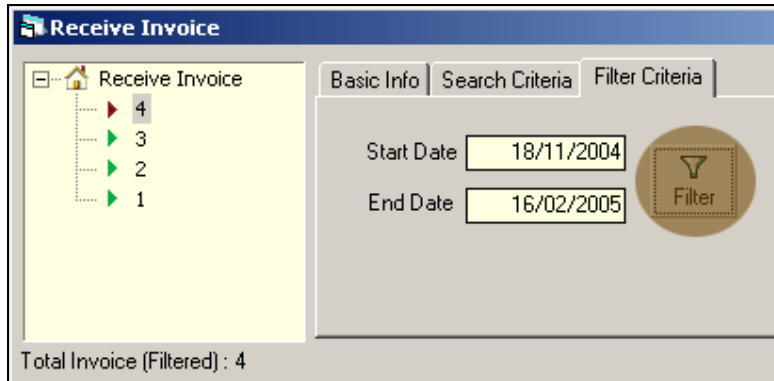
This form is used to edit, create, delete, and print Receive Invoices. Controls in the form are grouped into four blocks:

- A. *Invoice List*: Invoices can be listed grouped by Invoice No. or Invoice Date. A label shows the total number.
- B. *Invoice Entry Fields*: To describe an invoice, six fields are required.
 - Invoice No.—A unique sequence to represent the invoice
 - Receive Date—Date goods are received
 - Received By—Name of receiving officer
 - Supplier—Name of supplier
 - Local Purchase Invoice No.—Voucher number of local supplier
 - Local Purchase Invoice Date—Date of local supplier voucher
 First four fields are compulsory.
- C. *Invoice Items Entry Fields*: Invoices consist of line items, with one line for every item received. Every line has the following eight fields:
 - Item—Name of item received
 - Unit—Unit of measurement of item
 - Lot No.—Lot number of the received goods
 - Mfg. Date—Manufacturing date of the received goods
 - Received Qty.—Total quantity of received goods
 - Expiry Date—Date of expiry of received goods
 Item and Received Qty. are compulsory; Unit field is shown automatically; and all other fields are optional.
- D. *Command Buttons*: Buttons available to manipulate the Invoices


3.1.3. View information about a specific invoice

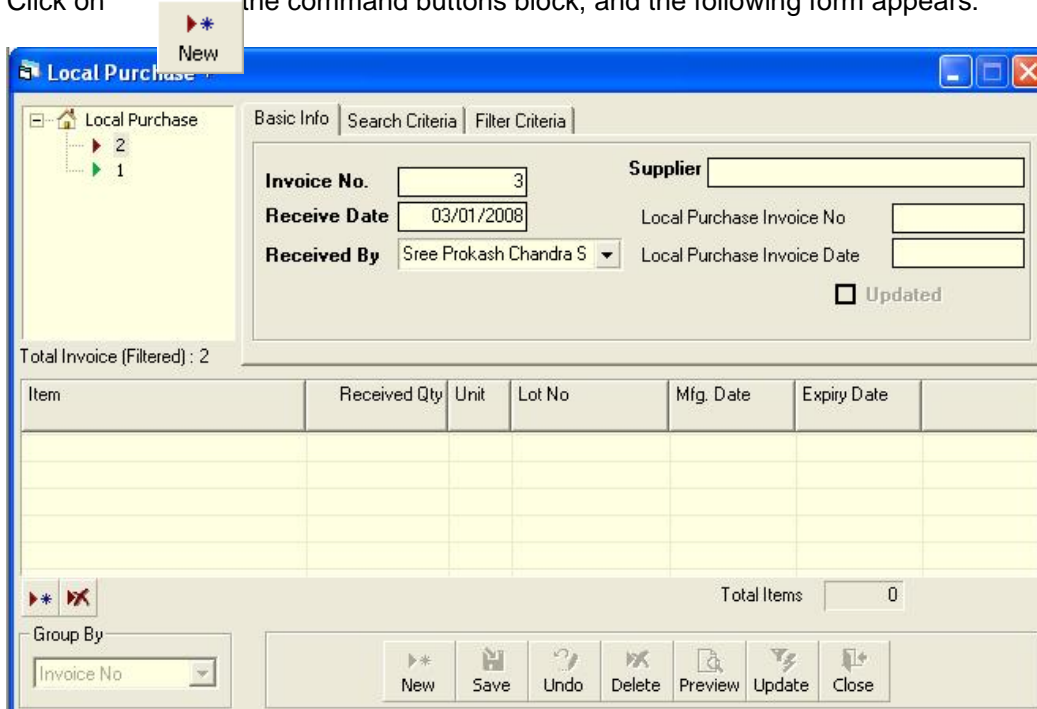



- Select the invoice to view from the tree-like list in Block A. Invoices can be grouped in two ways: the Group By combo box, which allows you to search by Invoice No. or by Receive Date.
- After an invoice number is selected, corresponding information is shown in blocks B and C.
- At any time a partial list of invoices is shown based on the Filter Criteria. Only invoices that fall between Start Date and End Date are listed. You can change the dates and click on Filter to list fewer or more invoices.

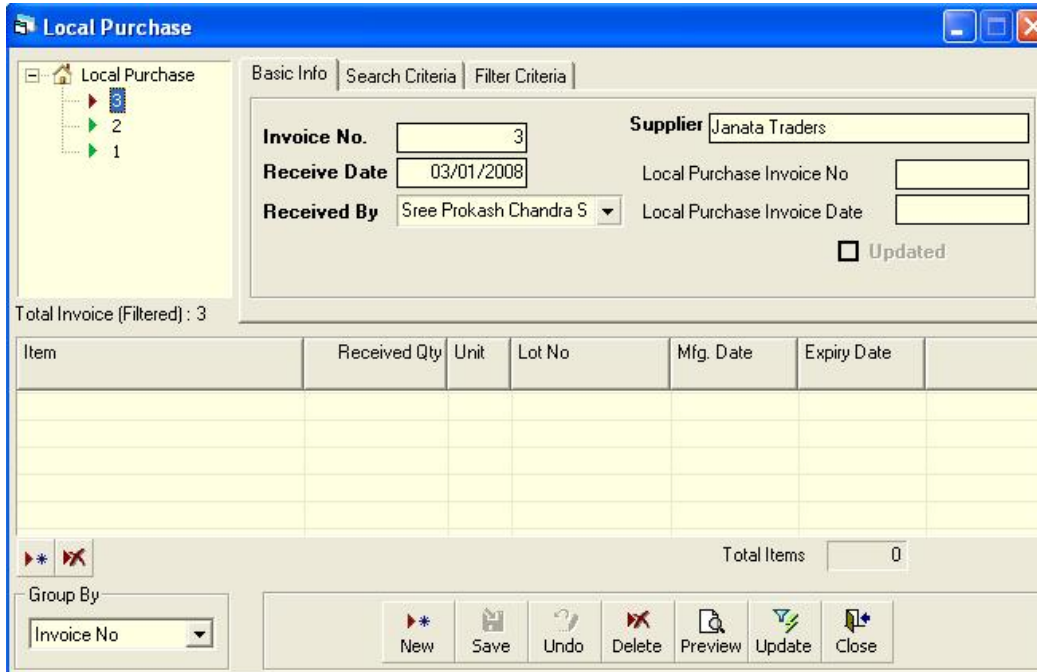


3.1.4. Enter a new invoice

Click on  in the command buttons block, and the following form appears:




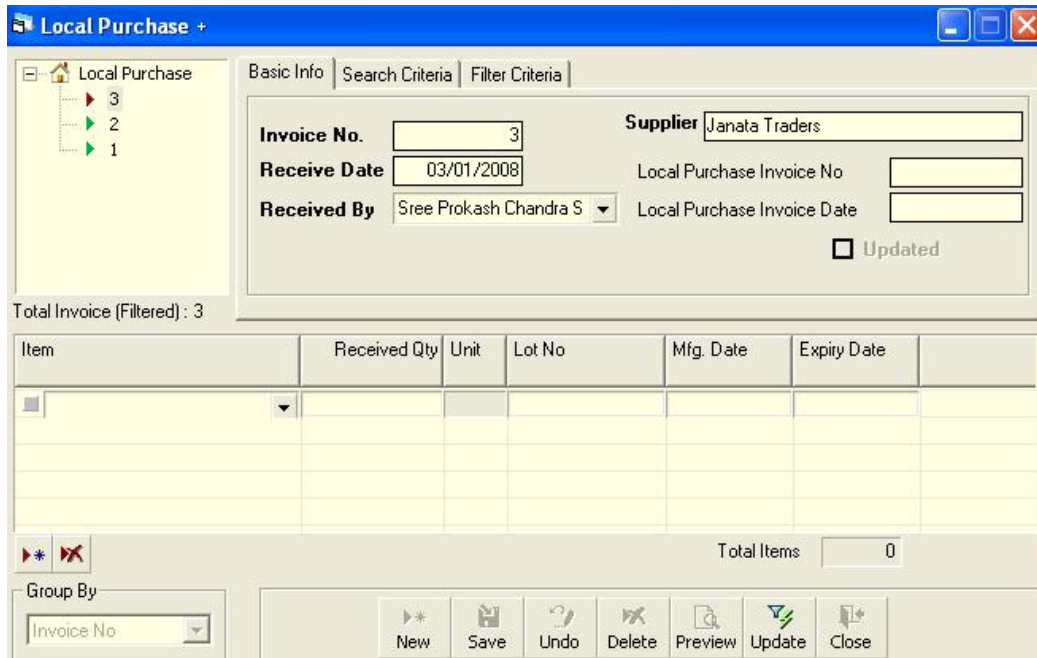
- The Invoice No. is generated automatically.
 - Receive Date shows current date, which you can change if necessary.
 - Select the employee who is receiving the goods.
 - Enter the supplier name.
 - Provide Invoice No. and date from local supplier's invoices (not compulsory).
-
- Click on , and your new Invoice No. is visible in the invoice list.



- If you want to cancel the new invoice entry, press Esc during editing to undo.

3.1.5. Invoice Items Entry

- Click on  in the command buttons block, and the following form appears:



- Select an item name from Item combo box.
- Unit field is filled automatically.

- Enter Lot No., Mfg. Date, Received Qty., and Expiry Date fields.

Local Purchase

Basic Info | Search Criteria | Filter Criteria

Invoice No. Supplier

Receive Date Local Purchase Invoice No.

Received By Local Purchase Invoice Date

Updated

Total Invoice (Filtered) : 3

Item	Received Qty	Unit	Lot No	Mfg. Date	Expiry Date
1ML. DISPOSABLE SYRINGE	1000	pcs			

Total Items

Group By:

New Save Undo Delete Preview Update Close

- Click on  Save

Local Purchase

Basic Info | Search Criteria | Filter Criteria

Invoice No. Supplier

Receive Date Local Purchase Invoice No.

Received By Local Purchase Invoice Date

Updated

Total Invoice (Filtered) : 3

Item	Received Qty	Unit	Lot No	Mfg. Date	Expiry Date
1ML. DISPOSABLE SYRINGE	1,000	pcs			

Total Items


Group By:

New Save Undo Delete Preview Update Close

3.1.6. Updating the Stock

Entering a new invoice does not update current stock position automatically. After the invoice entry is complete, click on UPDATE to recalculate the balance of items from the current invoice.


Note: After the invoice figures are updated to stock, the invoice will be locked, and you will not be allowed to change any figure.

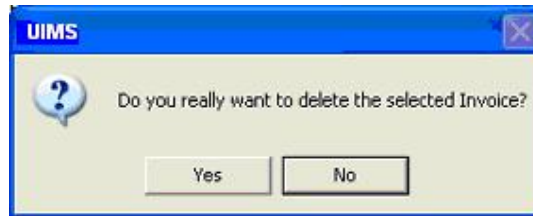
- Click on  , and a confirmation dialog box appears.
- Click on Yes if you are sure the invoice figures are correct.
- A confirmation dialog box shows the number of items for which stock was updated.

3.1.7. Edit an existing invoice

- Select the invoice you want to edit from the list of invoices.
- Change the fields as necessary.
- When done with editing, click on Save.
- If you want to cancel the current editing, press Esc to undo the changes.

3.1.8. Delete an existing invoice

- Select the invoice you want to remove from invoices list.
- Click on  , and a confirmation dialog box appears:



- Click on Yes if you really want to delete the invoice.
- You will not be able to delete an invoice that has items under it. First delete the items and then delete the invoice.

3.1.9. Edit an existing invoice item

Item	Received Qty	Unit	Lot No	Mfg. Date	Expiry Date
STEEL TRUNK	2,000	pcs			

- Select the invoice item you want to edit from the items list in Block C.


Item	Received Qty	Unit	Lot No	Mfg. Date	Expiry Date
STEEL TRUNK	8000	pcs			

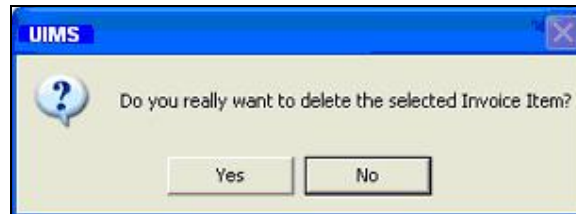
- Press F2 or click on any field to start editing.

Item	Received Qty	Unit	Lot No	Mfg. Date	Expiry Date	
STEEL TRUNK	8,000	pcs				

- Change the fields as necessary.
- When done with editing, click on Save.
- If you want to cancel the current editing, press Esc to undo the changes.

3.1.10. Delete an invoice item

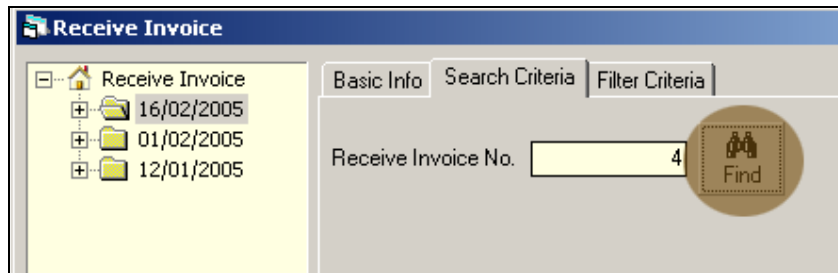
- Select the invoice item you want to edit from the items list in block C.
- Click on , and a confirmation dialog box appears:



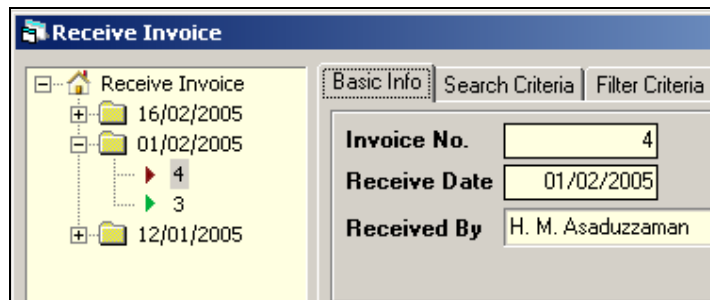
- Click on Yes if you really want to delete the invoice item.

3.1.11. Search a Receive Invoice


- Click on Search Criteria tab to find a specific invoice.




- Enter the invoice no you want to find in 'Receive Invoice No.' box.
- Click on FIND to start searching.
- If the invoice is found then it will display as selected.

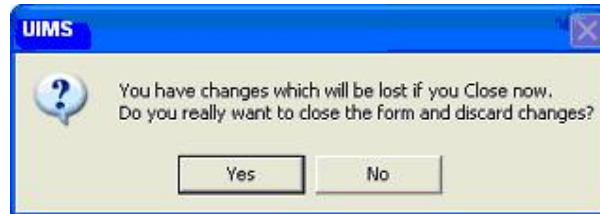


3.1.12. Print Receive Invoice

- Click on  Preview to preview the invoice.
- Click on the printer icon, and The print dialog box appears.
- Optionally provide Print Range, Copies and click on OK. If you want to print only one copy of the whole report, then click on OK.
- After printing, click on the leftmost X button to close the preview window.

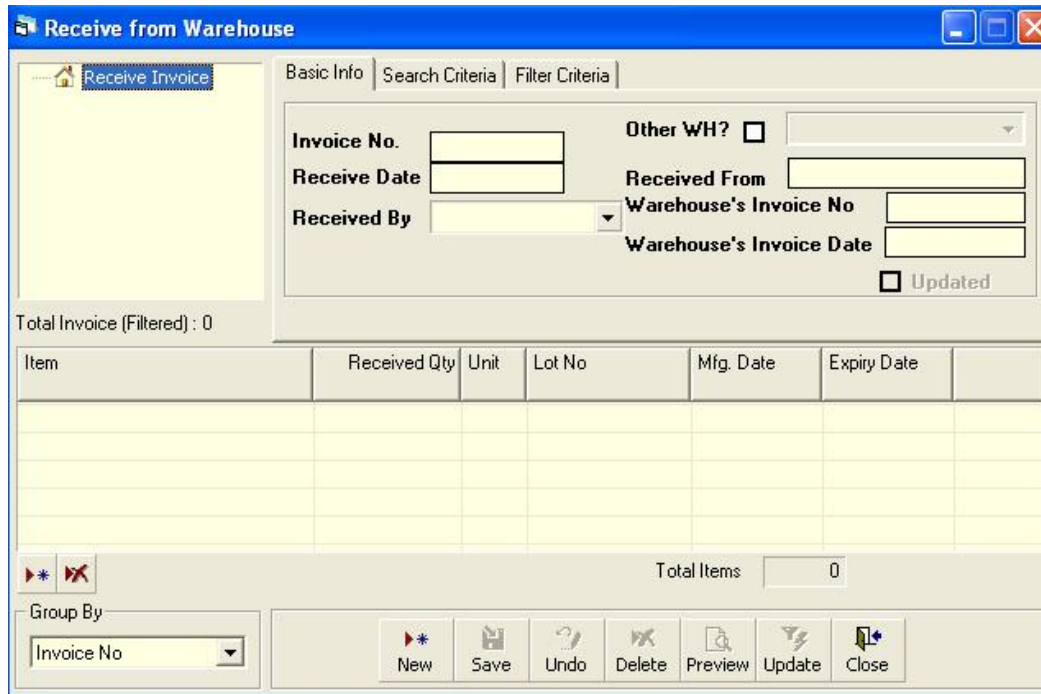
3.1.13. Close Receive Invoice form

- Click on  Close to exit from the receive Invoice form.
- You can also exit by clicking on the X button at the top right of the form.
- If you have unsaved invoice during exit, you will be informed that your changes will be lost if you exit.



- Click on Yes if you do want to exit without saving. Click on No, if you don't want to close the form at this time.

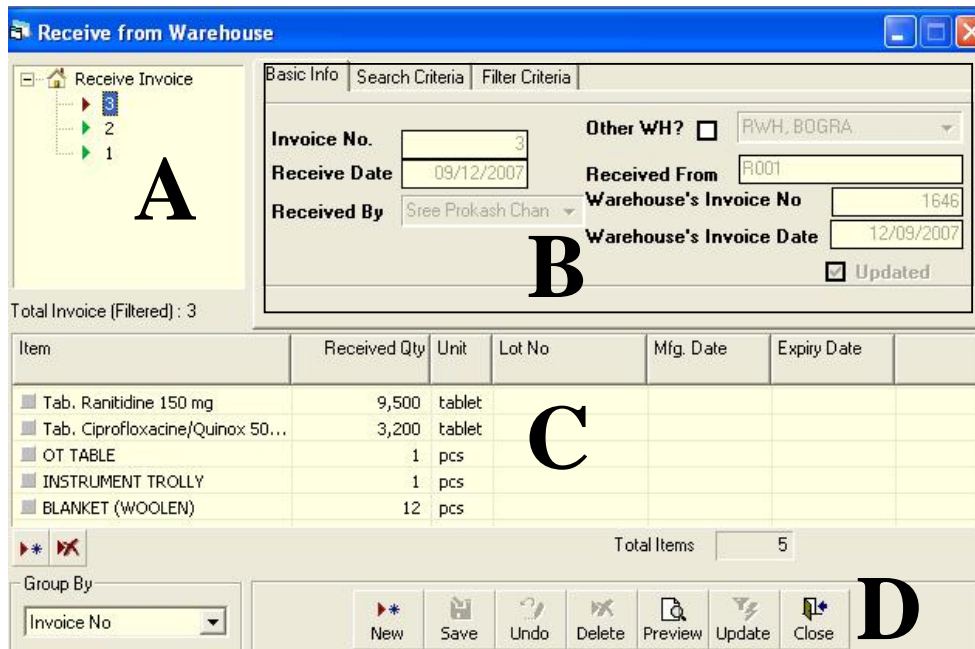
3.2. Receive Invoice from Warehouse



3.2.1. Open Receive Invoice form

- Run UIMS.
- Select Invoice > Receive Invoice from menu.
- The Receive Invoice form appears.

3.2.2. General description of Receive Invoice form



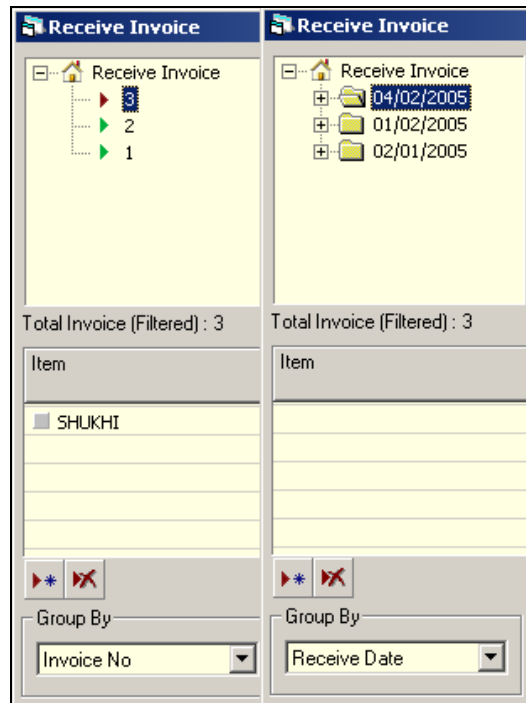
This form is used to edit, create, delete, and print Receive Invoices. Controls in the form are grouped into four blocks:

- A. *Invoice List*: Invoices are listed by item group. Invoice Group combo filters the invoices according to their group, and invoices can also be listed grouped by Invoice No. or Invoice Date. A label shows the total number.
- B. *Invoice Entry Fields*: To describe an invoice, six fields are required.
 - Invoice No.—A unique sequence to represent the invoice
 - Receive Date—Date of receipt of goods
 - Received By—Name of receiving officer
 - Received From —Name of warehouse from where goods were sent
If goods received from other WH under which the upazila does not belong, check Other WH checkbox and select the WH.
 - WH's Invoice No.—Voucher number of WH
 - WH's Invoice Date—Date of WH's voucher

All of the fields are compulsory.
- C. *Invoice Items Entry Fields*: Invoices consist of line items, with one line for every item received. Every line has the following six fields:
 - Item—Name of item received
 - Unit—Unit of measurement of item
 - Lot No.—Lot number of goods received
 - Mfg. Date—Manufacturing date of goods received
 - Received Qty.—Total quantity of goods received
 - Expiry Date—Date of expiry of received goods

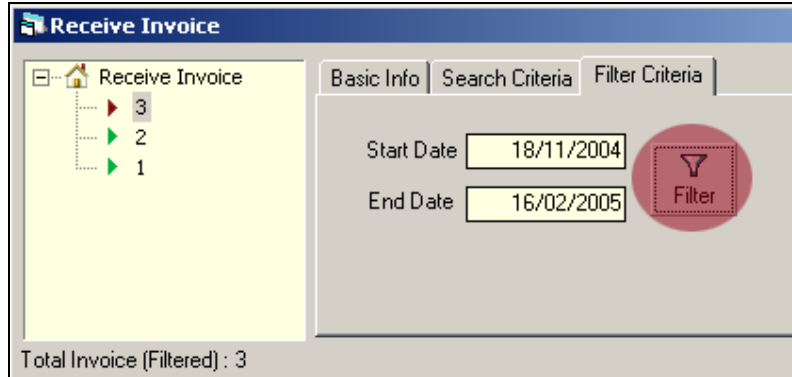
Item and Received Qty. are compulsory; unit field is shown automatically; and all other fields are optional.
- D. *Command Buttons*: Buttons available to manipulate Invoices.

3.2.3. View information about a specific invoice



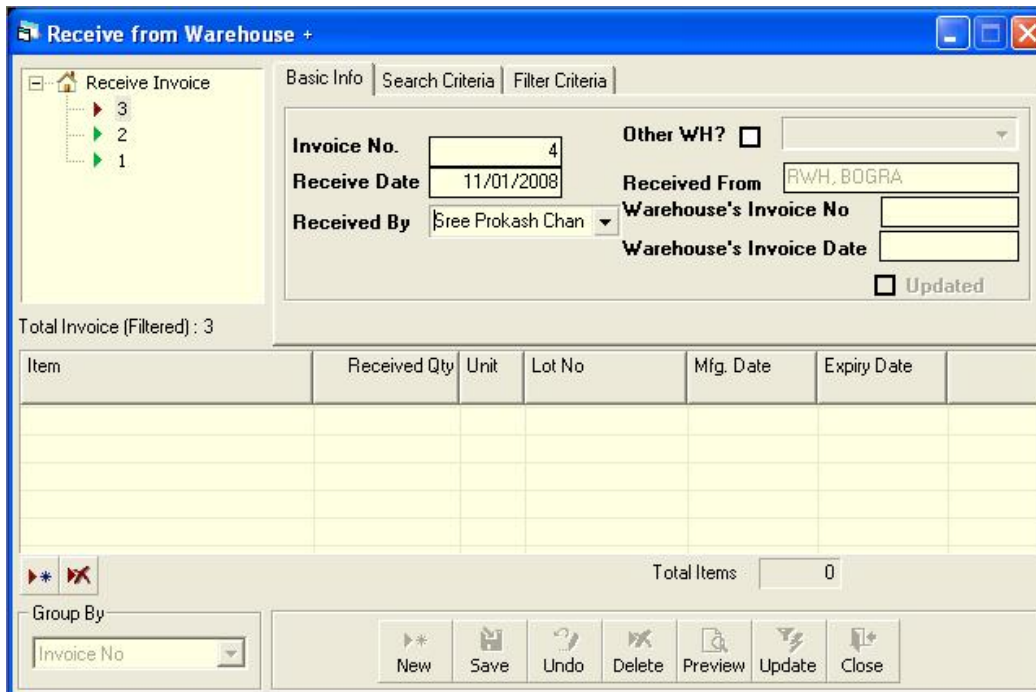
- Select the invoice to view from the tree-like list in Block A. Invoices can be grouped in two ways: by Invoice No. or by Receive Date.

- After an invoice number is selected, corresponding information is shown in blocks B and C.
- At any time, a partial list of invoices is shown based on the Filter Criteria. Only invoices that fall between Start Date and End Date are listed. You can change the dates and click on Filter to list fewer or more invoices.

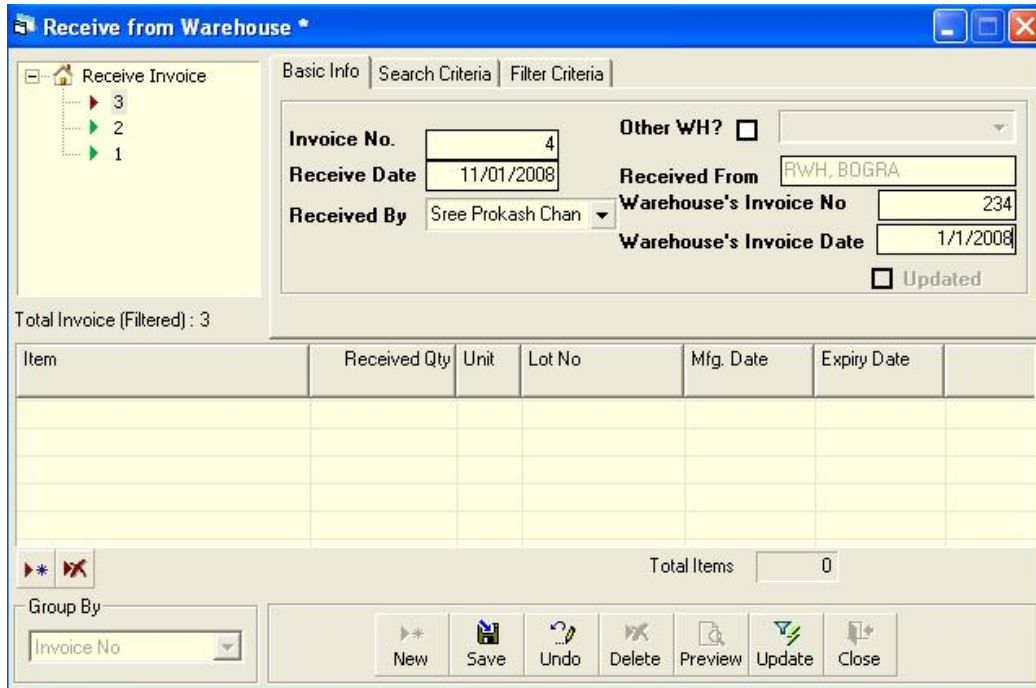


3.2.4. Enter a new invoice

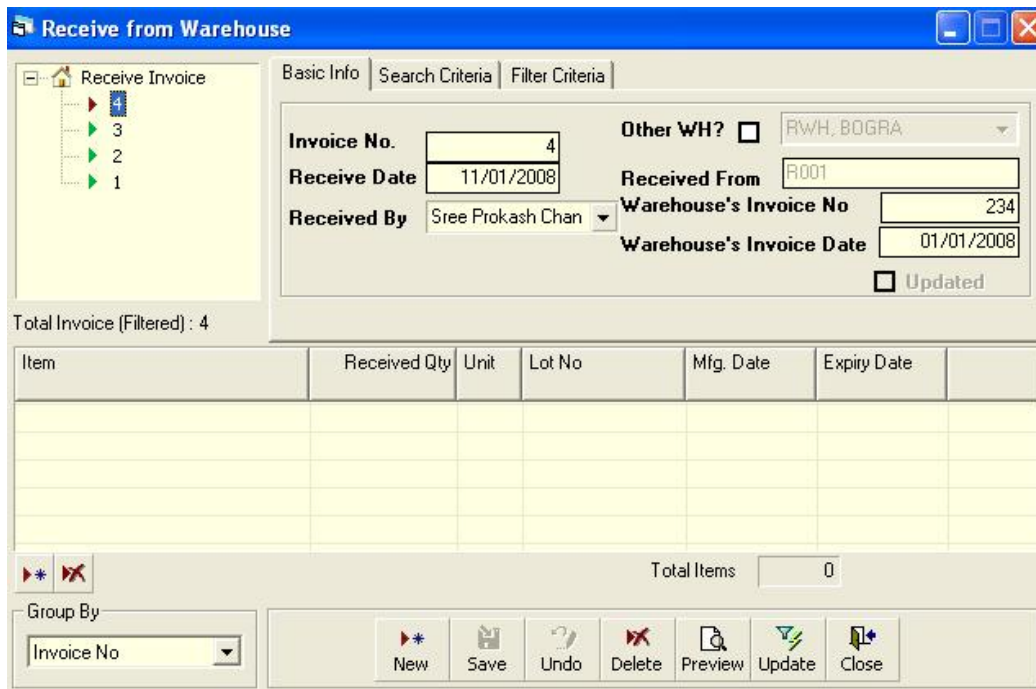
Click on  the command buttons block, and the following form appears:



- The Invoice No. is generated automatically.
- Receive Date displays current date, which you can change if necessary.
- Select the employee who is receiving the goods.
- Respective WH name appears automatically. If item is received from other WH, then select Other WH and select the WH.
- Provide invoice number and date from WH's challan.




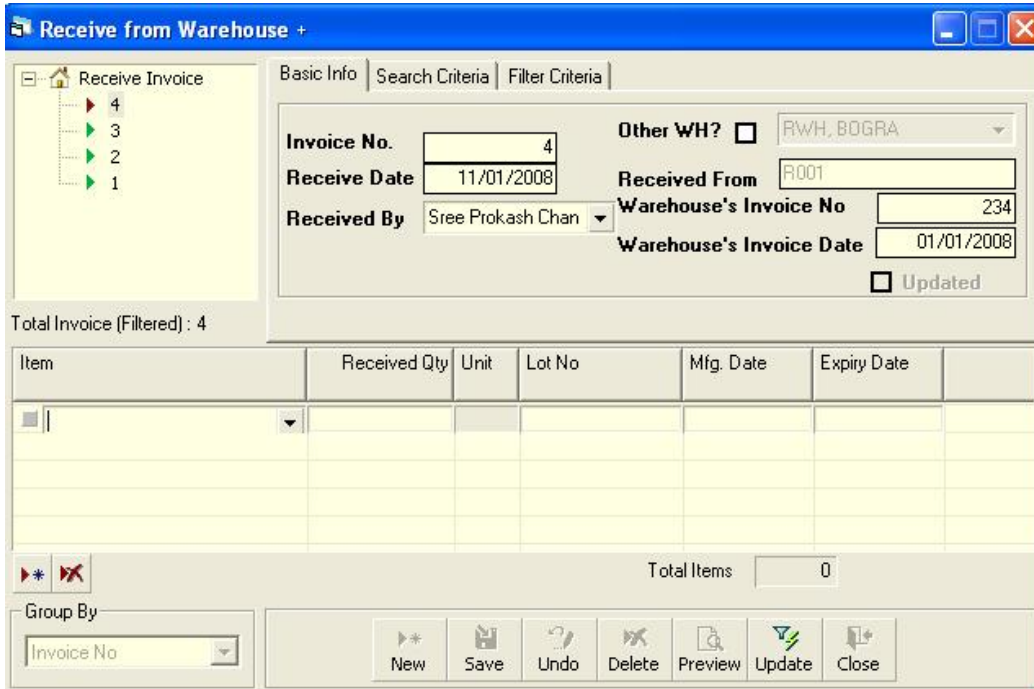
- Click on  , and your new invoice number is visible in the invoice list.



- If you want to cancel the new invoice entry, press Esc during editing to undo.

3.2.5. Invoice Items Entry

- Click on  in the command buttons block, and the following dialog box appears:



Receive from Warehouse +

Basic Info | Search Criteria | Filter Criteria

Invoice No. Other WH? RWH, BOGRA

Receive Date Received From

Received By Warehouse's Invoice No.

Warehouse's Invoice Date Updated

Total Invoice (Filtered) : 4

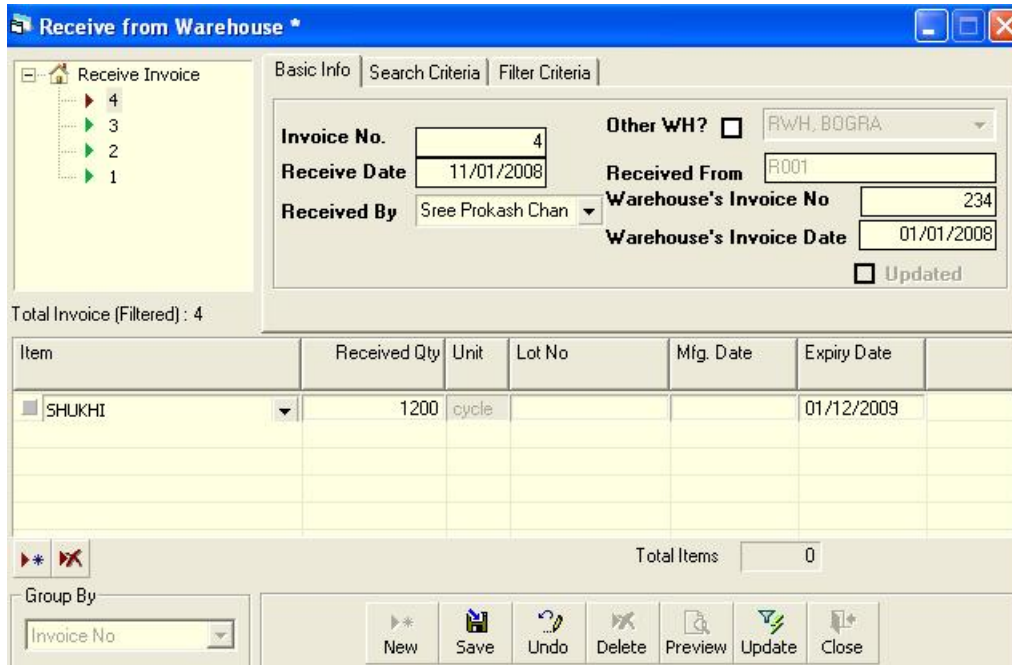
Item	Received Qty	Unit	Lot No	Mfg. Date	Expiry Date

Total Items

Group By

New Save Undo Delete Preview Update Close

- Select an item name from Item combo box.
- Unit field is filled automatically.
- Enter Lot No., Mfg. Date, Received Qty., and Expiry Date fields.



Receive from Warehouse *

Basic Info | Search Criteria | Filter Criteria

Invoice No. Other WH? RWH, BOGRA

Receive Date Received From

Received By Warehouse's Invoice No.

Warehouse's Invoice Date Updated


Total Invoice (Filtered) : 4

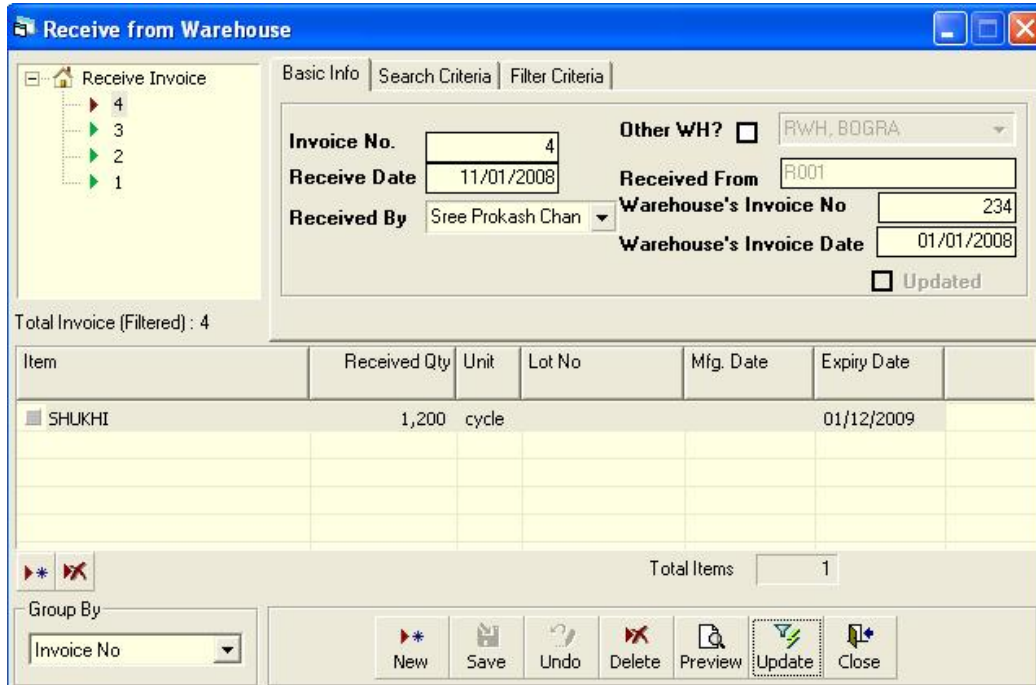
Item	Received Qty	Unit	Lot No	Mfg. Date	Expiry Date
SHUKHI	1200	cycle			01/12/2009

Total Items

Group By

New Save Undo Delete Preview Update Close

- Click on  Save



Receive from Warehouse

Basic Info | Search Criteria | Filter Criteria

Invoice No. Other WH? RWH, BOGRA

Receive Date Received From

Received By Warehouse's Invoice No.

Warehouse's Invoice Date Updated

Total Invoice (Filtered) : 4

Item	Received Qty	Unit	Lot No	Mfg. Date	Expiry Date
SHUKHI	1,200	cycle			01/12/2009

Total Items


Group By:

New Save Undo Delete Preview Update Close

3.2.6. Updating the Stock

Entering a new invoice does not update current stock position automatically. After the invoice entry is complete, click on UPDATE to recalculate the balance of items from the current invoice.


Note: After the invoice figures are updated to stock, the invoice will be locked, and you will not be allowed to change any figure.

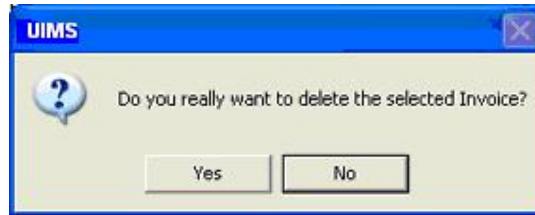
- Click on  Update, and a confirmation dialog box appears.
- Click on Yes if you are sure that the invoice figures are correct.
- A confirmation dialog box shows the number of items for which stock was updated.

3.2.7. Edit an existing invoice

- Select the invoice you want to edit from the list of invoices.
- Change the fields as necessary.
- When done with editing, click on Save.
- If you want to cancel the current editing, press Esc to undo the changes.

3.2.8. Delete an existing invoice

- Select the invoice you want to remove from invoices list.
- Click on  Delete, and a confirmation dialog box appears:



- Click on Yes if you really want to delete the invoice.
- You will not be able to delete an invoice that has items under it. Instead, first delete the items and then delete the invoice.

3.2.9. Edit an existing invoice item

Item	Received Qty	Unit	Lot No	Mfg. Date	Expiry Date
STEEL TRUNK	2,000	pcs			

- Select the invoice item you want to edit from the items list in Block C.


Item	Received Qty	Unit	Lot No	Mfg. Date	Expiry Date
STEEL TRUNK	8000	pcs			

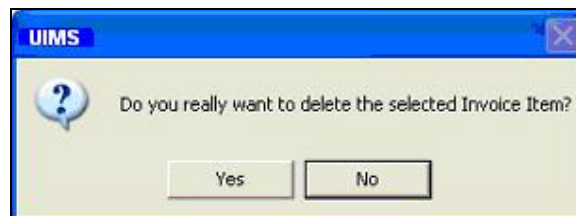
- Press F2 or click on any field to start editing.

Item	Received Qty	Unit	Lot No	Mfg. Date	Expiry Date
STEEL TRUNK	8,000	pcs			

- Change the fields as necessary.
- When done with editing, click on Save.
- If you want to cancel the current editing, press Esc to undo the changes.

3.2.10. Delete an invoice item

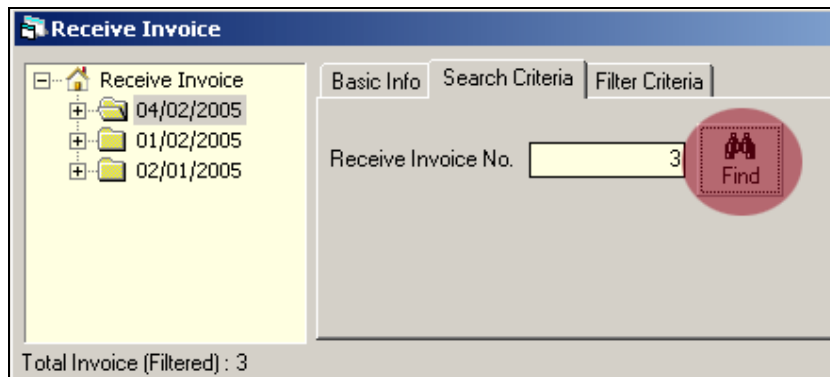
- Select the invoice item you want to edit from the items list in Block C.
- Click on , and a confirmation dialog box appears:



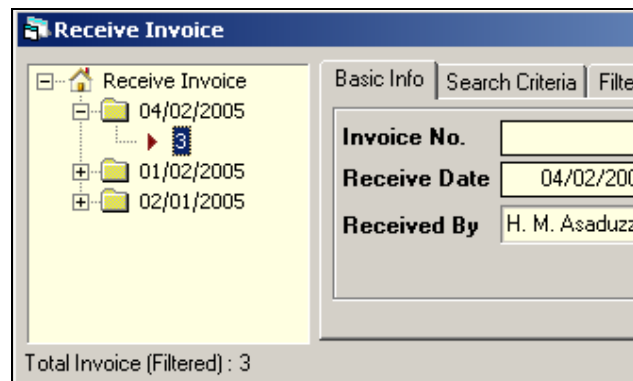
- Click on Yes if you really want to delete the invoice item.

3.2.11. Search a Receive Invoice


- Click on Search Criteria tab to find a specific invoice.




- Enter the invoice number you want to find in Receive Invoice No. box.
- Click on FIND to start searching.
- If the invoice is found, then it will be displayed as selected.

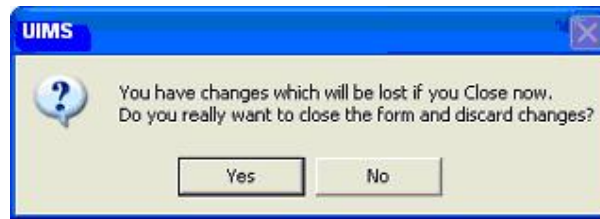


3.2.12. Print Receive Invoice

- Click on  to preview the invoice.
- Click on the printer icon, and the print dialog box appears.
- Optionally provide Print Range and Copies and click on OK. If you want to print only one copy of the whole report, then just click on OK.
- After printing, click on the leftmost X button to close the preview window.

3.2.13. Close Receive Invoice form

- Click on  to exit the receive Invoice form.
- You can also exit by clicking on the X button at the top right of the form.
- If you have unsaved invoices during exit, you are told that your changes will be lost if you exit.



- Click on Yes if you do want to exit without saving. Click on No, if you don't want to close the form at this time.

3.3. Issue Voucher

Issue Vouchers

Basic Info | Search Criteria | Filter Criteria

Invoice No. 82 SDP Group FWA

Union Union Updated

SDP 3/ Kha, Eliza Khatun, Arulia

Prepared By Md. Azahar Ali Date 11/07/2008

Approved By Shahnaz Parvin Date 11/07/2008

Issued By Md. Azahar Ali Date 11/07/2008

Remarks

Item	Issued Qty	Unit	Stock Qty	Lot No	Mfg. Date	Expiry Date
SHUKHI	10,000	cy...	37,725	48		

Received By Mian Abdul Kader Designation Store Keeper Total Items 1

Group By Invoice No

New Save Undo Delete Preview Update Close

This form is used when distributing items to facilities. Item quantities issued through this invoice are deducted from the total stock. This form is used to enter new Issue Vouchers and edit, print, or delete old invoices.

3.3.1. Open Issue Voucher form

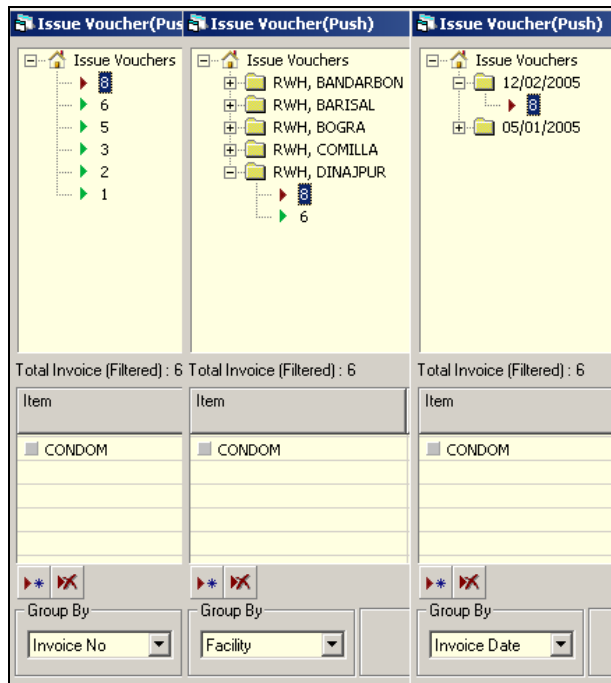
- Run UIMS.
- Select Invoice > Issue Voucher from menu.
- The Issue Voucher form is displayed.

3.3.2. General description of Issue Voucher form

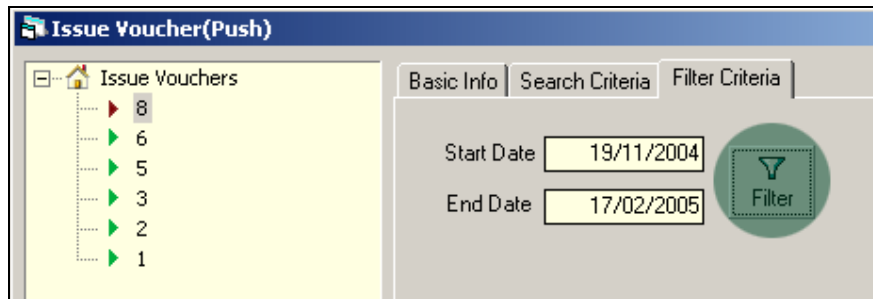
This form is used to edit, create, delete, and print Issue Vouchers. Controls in the form are grouped into four blocks:

- A. *Invoice List*: Invoices can be listed grouped by Invoice No or Invoice Date or Facility. A label shows the total number.
- B. *Invoice Entry Fields*: To describe an invoice, the following fields are required.
 - Invoice No.—A unique sequence to represent the invoice
 - SDP Group—Group of the Facility receiving the items
 - Union—Union of the Facility receiving the items
 - SDP—Name of the Facility receiving the items
 - Prepared By, Approved By, Supplied By—Names of employees who are responsible for issuing items. There are three date fields related to the names.
 - Prepared By Date, Approved By Date, Supplied By Date—Dates on which invoices are prepared and approved and supplies are provided
 - Remarks—Any comments about the supply
 Invoice No., Facility, Prepared By, Approved By, Supplied By, and their related date fields are compulsory.
- C. *Invoice Items Entry Fields*: Invoices consist of line items; there is one line for every item received. Every line has the following seven fields:
 - Item—Name of item requested
 - Unit—Unit of measurement of item
 - Stock Qty.—Current stock quantity in issuing facility
 - Issued Qty.—Quantity issued to facility
 - Lot No.—Lot number of item issued
 - Mfg. Date—Manufacturing date of item lot issued
 - Expiry Date—Expiry date of goods in lot
 Item and Issued Qty. fields are compulsory. Unit, Stock Qty., Lot No., Mfg. Date, and Expiry date are picked automatically from item's lot information.
- D. *Command Buttons*: Buttons available to manipulate Invoices.


3.3.3. View information about a specific invoice

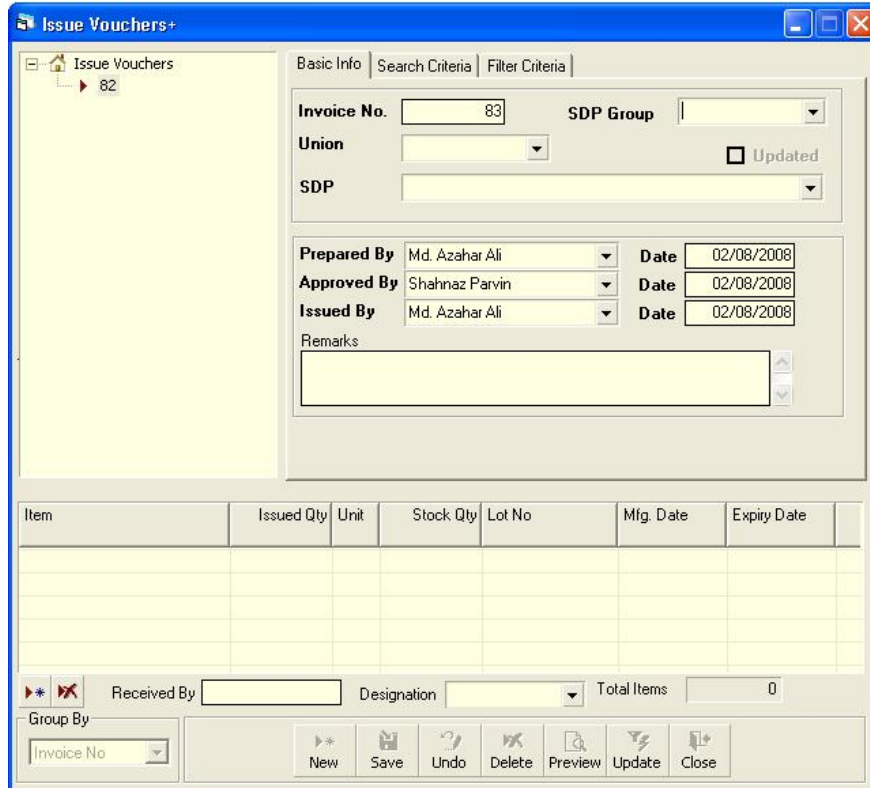


- Select the invoice to view from the tree-like list in Block A. Invoices can be grouped in three ways: by Invoice No., Facility, or Invoice Date.
- After an invoice number is selected, the corresponding information is shown in blocks B and C.
- At any time, a partial list of invoices is displayed based on the Filter Criteria. Only invoices that fall between Start Date and End Date are listed. You can change the dates and click on Filter to list fewer or more invoices.

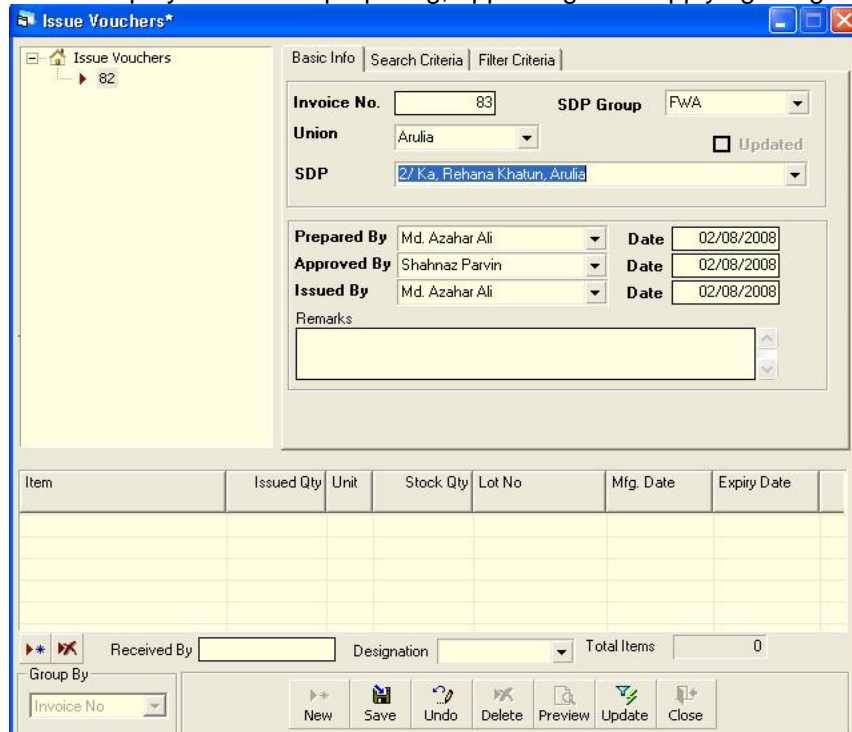



3.3.4. Enter a new invoice

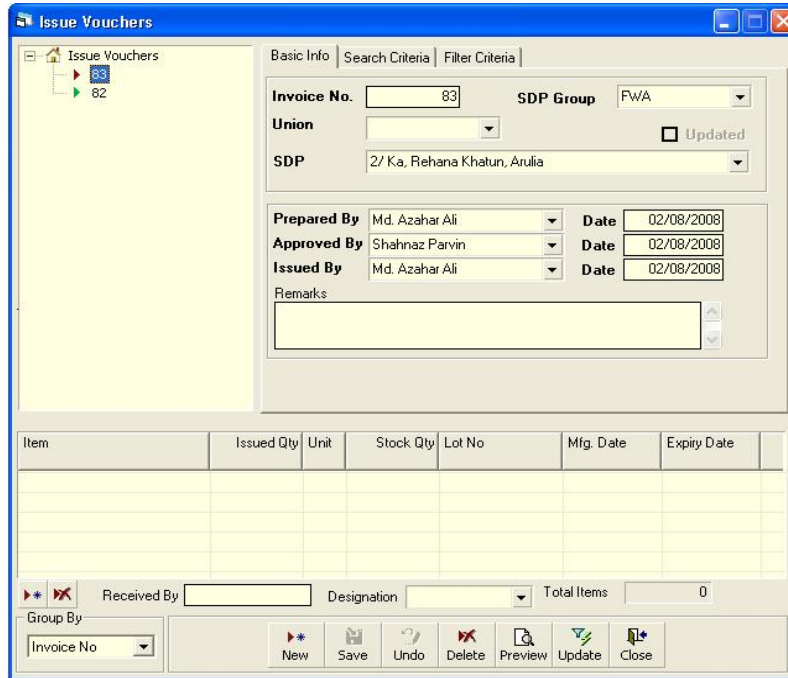
- Click on  in the command buttons block, and the following form appears:



- The Invoice No. is generated automatically.
- Select SDP Group, Union and the SDP
- Date fields reflect current date, which you can change if necessary.
- Select the employee who are preparing, approving and supplying the goods.




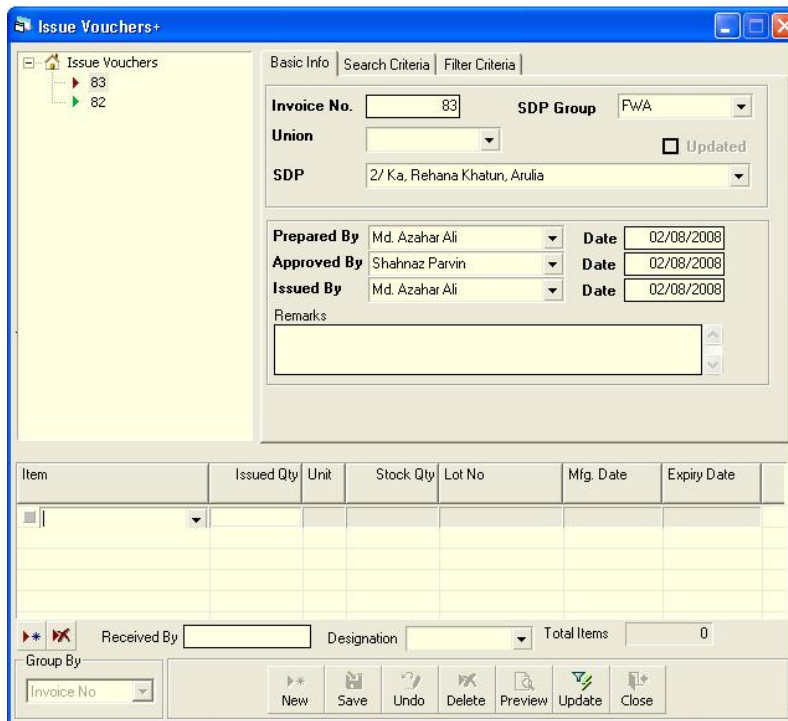
- Click on  , and your new invoice number appears in the invoice list.



- If you want to cancel the new invoice entry, press Esc during editing to undo.

3.3.5. Invoice Items Entry

- Click on  in the command buttons block, and the following form appears:




- Select an item name from Item combo box.
- Unit field is filled in automatically.

- Enter Issued Qty.
- The Stock Qty, Lot No., Mfg. Date, and Expiry Date, if available, are picked from the lot information.

The screenshot shows the 'Issue Vouchers' application window. The 'Basic Info' tab is active. The 'Invoice No.' is 83, 'SDP Group' is FWA, and 'SDP' is 2/ Ka, Rehana Khatun, Arulia. The 'Prepared By', 'Approved By', and 'Issued By' are all Md. Azahar Ali, with dates of 02/08/2008. The 'Remarks' field is empty. Below the form is a table with the following data:

Item	Issued Qty	Unit	Stock Qty	Lot No	Mfg. Date	Expiry Date
SHUKHI	1440	cycle	27725	48		

The 'Received By' field is empty, and the 'Total Items' counter is 0. The 'Group By' dropdown is set to 'Invoice No'. The 'Save' button is highlighted.

- Click on 

The screenshot shows the 'Issue Vouchers' application window after clicking the 'Save' button. The 'Issued Qty' field now contains 1,440. The 'Total Items' counter is now 1. The table data is updated as follows:


Item	Issued Qty	Unit	Stock Qty	Lot No	Mfg. Date	Expiry Date
SHUKHI	1,440	cy...	50400	718		31/05/2012

The 'Received By' field is still empty, and the 'Group By' dropdown remains 'Invoice No'. The 'Update' button is now highlighted.

3.3.6. Updating the Stock

Entering a new invoice does not update current stock position automatically. After the invoice entry is complete, click on UPDATE to recalculate the balance of items from the current invoice.


Note: After the invoice figures are updated to stock, the invoice will be locked, and you will not be allowed to change any figure.

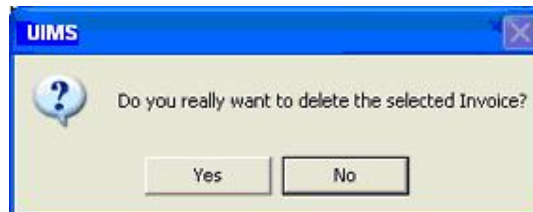
- Click on  , and a confirmation dialog box appears.
- Click on Yes if you are sure the invoice figures are correct.
- A confirmation dialog box shows the number of items for which stock was updated.

3.3.7. Edit an existing invoice

- Select the invoice you want to edit from the list of invoices.
- Change the fields as necessary.
- When done with editing, click on Save.
- If you want to cancel the current editing, press Esc to undo the changes.

3.3.8. Delete an existing invoice

- Select the invoice you want to remove from invoices list.
- Click on  , and a confirmation dialog box appears:



- Click on Yes if you really want to delete the invoice.
- You will not be able to delete an invoice that has items under it. You have to delete the items and then delete the invoice.

3.3.9. Edit an existing invoice item

Item	Unit	Stock Qty	Issued Qty	Lot No	Mfg. Date	Expiry Date
CONDOM	pcs	700,000	90,000			01/12/2007

- Select the invoice item you want to edit from the items list in Block C.


Item	Unit	Stock Qty	Issued Qty	Lot No	Mfg. Date	Expiry Date
CONDOM	pcs	700,000	90,000			01/12/2007

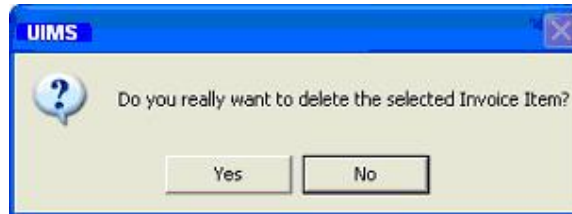
- Press F2 or click on any field to start editing.

Item	Unit	Stock Qty	Issued Qty	Lot No	Mfg. Date	Expiry Date
CONDOM	pcs	700,000	90,000			01/12/2007

- Change the fields as necessary.
- When done with editing, click on Save.
- If you want to cancel the current editing, press Esc to undo the changes.

3.3.10. Delete an invoice item

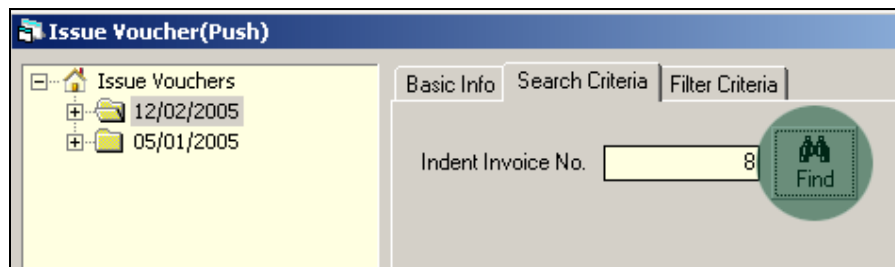
- Select the invoice item you want to edit from the items list in Block C.
- Click on , and a confirmation dialog box appears:.



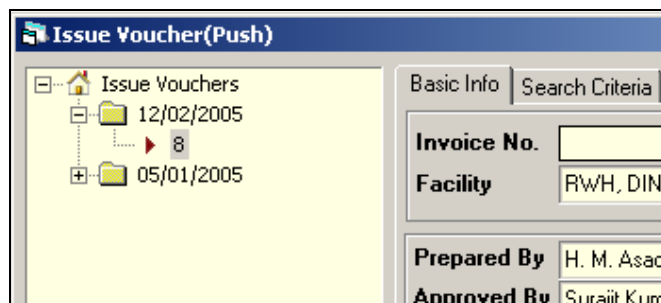
- Click on Yes if you really want to delete the invoice item.

3.3.11. Search a Issue Voucher


- Click on Search Criteria tab to find a specific invoice.



- Enter the invoice no you want to find in Indent Invoice No. box.
- Click on FIND to start searching.
- If the invoice is found, it displays as selected.




3.3.12. Print Issue Voucher

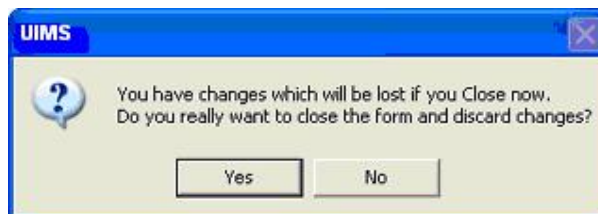
- Click on  to preview the invoice, and the invoice appears like the following:

Upazila Family Planning Office Bogra, Bogra <u>Issue Voucher</u> *						Office Copy	
ISSUING OFFICE: Bogra, Bogra				Invoice No: 83			
ISSUED TO: 2/ Ka, Rehana Khatun, Arulia				Print date: 02/08/2008			
Sl#	Code	Article	Quantity Issued		Unit	Lot No.	Exp. Date
			In Number	In Words			
1	CON002	SHUKHI	1,440	One thousand four hundred forty	CYCLE	T18	31/05/2012
Prepared & Issued By Store in charge		Approved By Upazila Family Planning Officer		Received By 2/ Ka, Rehana Khatun, Arulia			
Upazila Family Planning Office Bogra, Bogra <u>Issue Voucher</u> *						Recipient Copy	
ISSUING OFFICE: Bogra, Bogra				Invoice No: 83			
ISSUED TO: 2/ Ka, Rehana Khatun, Arulia				Print date: 02/08/2008			
Sl#	Code	Article	Quantity Issued		Unit	Lot No.	Exp. Date

- Print the Invoice

3.3.13. Close Issue Voucher form

- Click on  to exit from the Issue Voucher (Push) form.
- You can also exit by clicking on the X button at the top right of the form.
- If you have unsaved invoices during exit, you are told that your changes will be lost if you exit.



- Click on Yes if you do want to exit without saving. Click on No if you don't want to close the form at this time.

3.4. Adjustment Invoice

This form is used for various stock adjustments, such as adjustment after physical stock, item expiry, destruction of expired items, and return from facility. This form is used to enter Adjustment Invoices and edit, print, or delete old invoices.

3.4.1. Open Adjustment Invoice form

- Run UIMS.
- Select Invoice > Adjustment Invoice from menu.
- The Adjustment Invoice form is displayed.

3.4.2. General description of Adjustment Invoice form

This form is used to edit, create, delete, and print Adjustment Invoices. Controls in the form are grouped into four blocks:

- A. *Invoice List*: Invoices can be listed grouped by Invoice No., Adjustment Type, or Invoice Date. A label shows the total number.
- B. *Invoice Entry Fields*: To describe an invoice, following fields are required.
 - Invoice No.—A unique sequence of numbers to represent the invoice
 - Adjustment Type—A list of adjustment types to select from. Possible adjustment types are:

<i>Add to Stock</i>	▪ If after physical inventory or any instance, it is found that an item is shown less than actual quantity in stock
<i>Remove from Stock</i>	▪ If after physical inventory or any instance, it is found that an item is shown excess than actual quantity in stock
<i>Return from Facility (Usable)</i>	▪ When an item is returned from a facility
<i>Return from Facility (Unusable)</i>	▪ When an unusable item is returned from a facility
<i>Unusable</i>	▪ Expiry date of item has passed
<i>Unusable Destroy</i>	▪ Expired items are destroyed

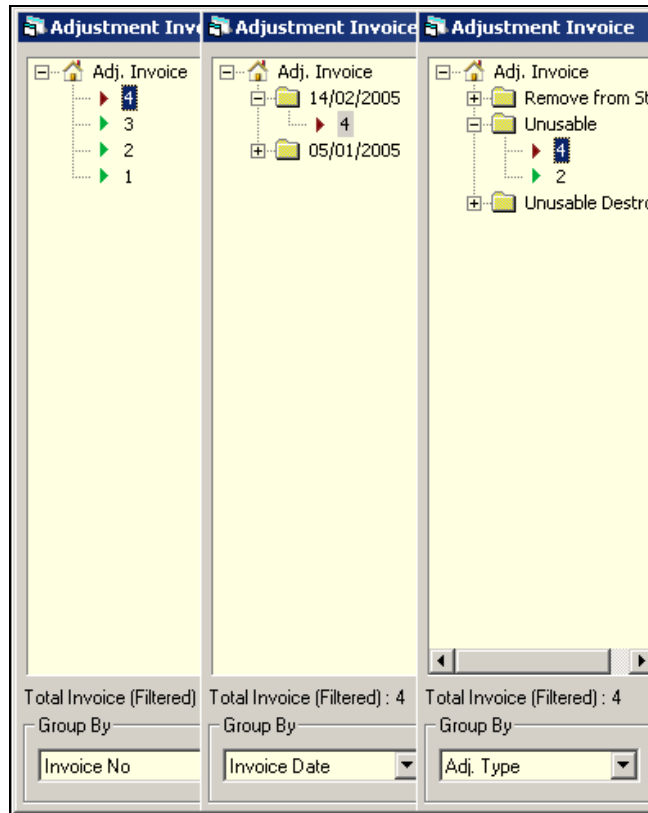
- To/From—Facility distributing the items
- Remarks—Comments about the adjustment reasons, outcome, etc.
- Prepared By, Approved By, and Supplied By—Employees who are responsible for adjusting items
- Prepared By Date, Approved By Date, and Issued By Date—Relevant dates of preparing, issuing, and approving adjustment invoice

Invoice No., Adjustment Type, To/From, Prepared By, Approved By, and their related date fields are compulsory.

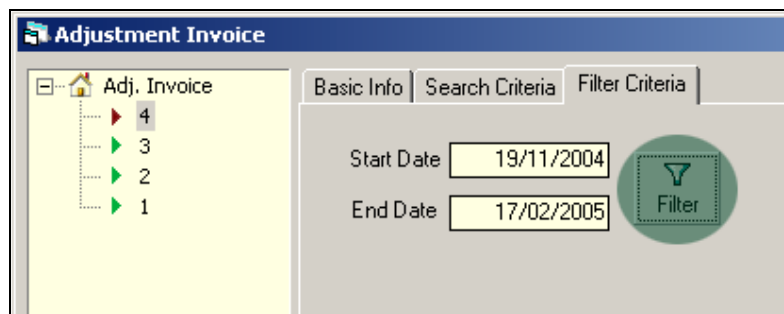
- C. *Invoice Items Entry Fields*: Invoices consist of line items; there is one line for every item received. Every line has the following seven fields:
 - Item—Name of item adjusted
 - Unit—Unit of measurement of item
 - Stock Qty.—Current stock quantity in facility performing the adjustment
 - Qty.—Quantity of goods adjusted
 - Lot No.—Lot number of item adjusted
 - Mfg. Date—Manufacturing date of item lot adjusted
 - Expiry Date—Expiry date of goods in lot

Item and Qty. fields are compulsory; other fields are optional.
- D. *Command Buttons*: Buttons available to manipulate the Invoices.

3.4.3. View information about a specific invoice




- Select the invoice to view from the tree-like list in Block A. Invoices can be grouped in three ways: by Invoice No., Adj. Type, or Invoice Date.
- After an invoice number is selected, corresponding information is shown in Block B and C.
- At any time a partial list of invoices is displayed based on the Filter Criteria. Only invoices that fall between Start Date and End Date are listed. You can change the dates and click on Filter to list fewer or more invoices.



3.4.4. Enter a new invoice

- Click on  in the command buttons block, and the following form appears:

- The Invoice No. is generated automatically.
- Date fields reflect current date, which you can change if necessary.
- Select any Adjustment Type from list.
- If available, select To/From
- Select the employees preparing and approving the invoice and mention preparation and approval dates.

- Click on , and your new invoice number is visible in the invoice list:

The screenshot shows the 'Adjustment Invoice' window with the following details:


- Invoice No.:** 1
- Adjustment Type:** Add to Stock
- To/From:** Sherpur, Bogra
- Remarks:** In the physical inventory more Condoms were found
- Prepared By:** Sree Prokash Chandra Sa, **Date:** 11/01/2008
- Approved By:** A. K. M. Sanaul Mostafa, **Date:** 11/01/2008
- Issued By:** Sree Prokash Chandra Sa, **Date:** 11/01/2008

Item	Unit	Stock Qty	Qty	Lot No	Mfg. Date	Expiry Da

At the bottom, the status bar shows 'Total Invoice (Filtered) : 1' and 'Total Items : 0'. The command buttons block includes New, Save, Undo, Delete, Preview, Update, and Close.

- If you want to cancel the new invoice entry, press Esc during editing to undo.

3.4.5. Invoice Items Entry

- Click on  in the command buttons block, and the following form appears:

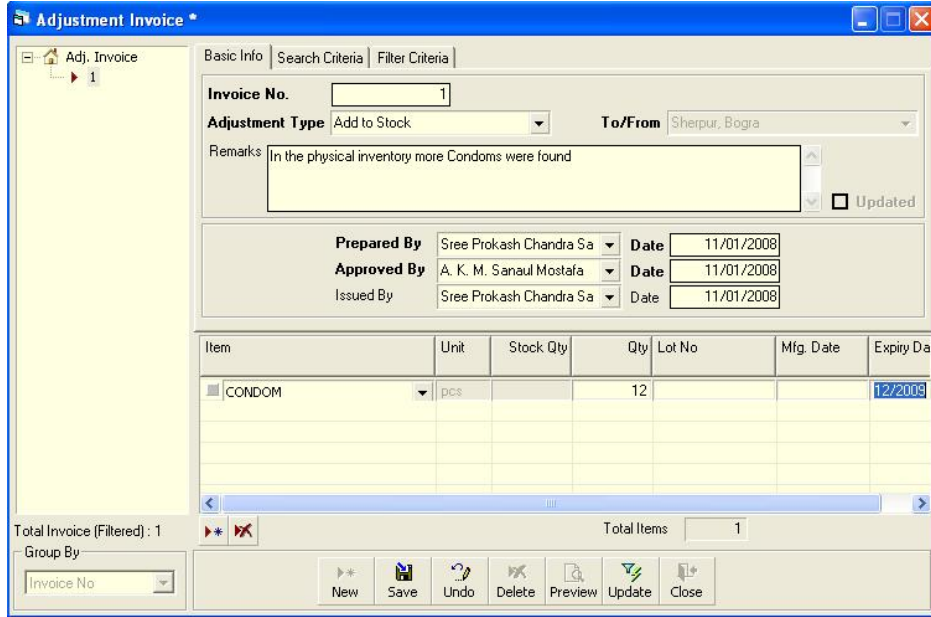
The screenshot shows the 'Adjustment Invoice' window with the following details:


- Invoice No.:** 1
- Adjustment Type:** Add to Stock
- To/From:** Sherpur, Bogra
- Remarks:** In the physical inventory more Condoms were found
- Prepared By:** Sree Prokash Chandra Sa, **Date:** 11/01/2008
- Approved By:** A. K. M. Sanaul Mostafa, **Date:** 11/01/2008
- Issued By:** Sree Prokash Chandra Sa, **Date:** 11/01/2008

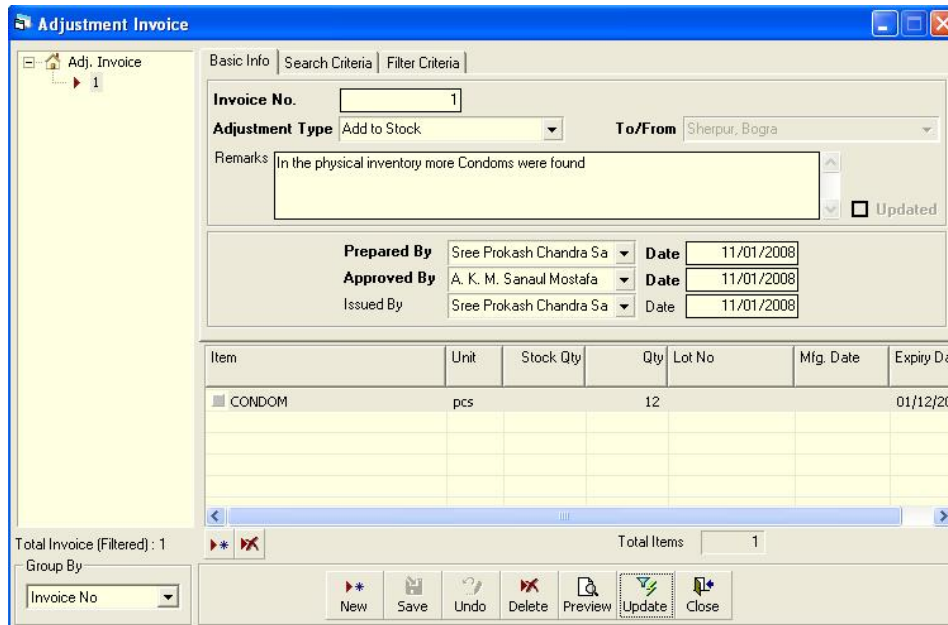
Item	Unit	Stock Qty	Qty	Lot No	Mfg. Date	Expiry Da

At the bottom, the status bar shows 'Total Invoice (Filtered) : 1' and 'Total Items : 1'. The command buttons block includes New, Save, Undo, Delete, Preview, Update, and Close.

- Select an item name from Item combo box.
- Unit field is filled automatically.
- Enter Qty.
- Unit and Stock Qty, are filled in automatically.
- The Lot No., Mfg. Date, and Expiry Date fields may be available for editing. If these are available, fill them in if necessary.




- Click on  Save



3.4.6. Updating the Stock

Entering a new invoice does not update current stock position automatically. After the invoice entry is complete, click on UPDATE to recalculate the balance of items from the current invoice.


Note: After the invoice figures are updated to stock, the invoice will be locked, and you will not be allowed to change any figure.

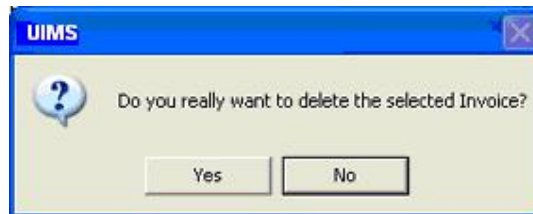
- Click on  , and a confirmation dialog box appears.
- Click on Yes if you are sure the invoice figures are correct.
- A confirmation dialog box shows the number of items for which stock was updated.

3.4.7. Edit an existing invoice

- Select the invoice you want to edit from the list of invoices.
- Change the fields as necessary.
- When done with editing, click on Save.
- If you want to cancel the current editing, press Esc to undo the changes.

3.4.8. Delete an existing invoice

- Select the invoice you want to remove from invoices list.
- Click on  , and a confirmation dialog box appears:.



- Click on Yes if you really want to delete the invoice.
- You will not be able to delete an invoice that has items under it. You must delete the items and then delete the invoice.

3.4.9. Edit an existing invoice item

Item	Unit	Stock Qty	Qty	Lot No	Mfg. Date	Expiry Da
NORPLANT	pcs	76,700	9,000			

- Select the invoice item you want to edit from the items list in Block C.


Item	Unit	Stock Qty	Qty	Lot No	Mfg. Date	Expiry Da
NORPLANT	pcs	76,700	9,000			

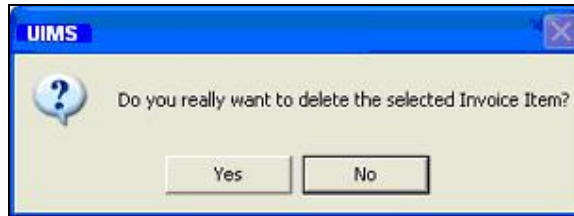
- Press F2 or click on any field to start editing.

Item	Unit	Stock Qty	Qty	Lot No	Mfg. Date	Expiry Da
NORPLANT	pcs	76,700	9,000			

- Change the fields as necessary.
- When done with editing, click on Save.
- If you want to cancel the current editing, press Esc to undo the changes.

3.4.10. Delete an invoice item

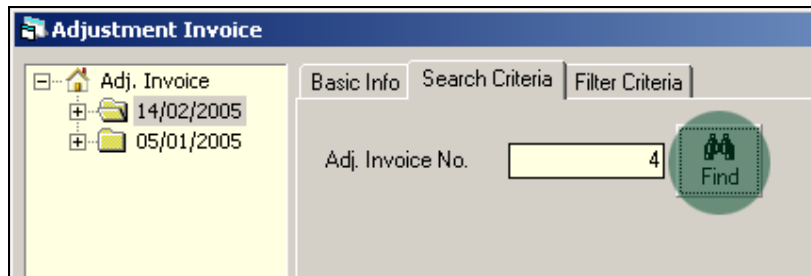
- Select the invoice item you want to edit from the items list in Block C.
- Click on , and a confirmation dialog box appears:.



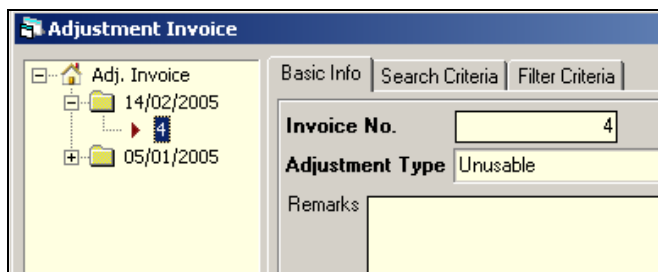
- Click on Yes if you really want to delete the invoice item.

3.4.11. Search a Adjustment Invoice


- Click on Search Criteria tab to find a specific invoice.



- Enter the invoice number you want to find in Adj. Invoice No. box.
- Click on FIND to start searching.
- If the invoice is found, it is displayed as selected.




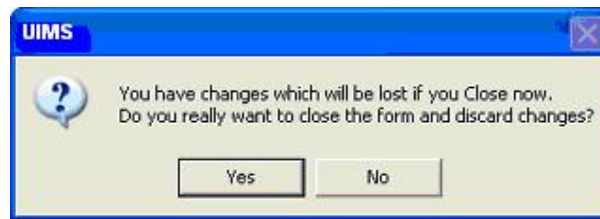
3.4.12. Print Adjustment Invoice

- Click on  to preview the invoice.
- Click on the printer icon, and the print dialog box appears.

- You can provide Print Range, Copies and click on OK. If you want to print only one copy of the whole report, then just click on OK.
- After printing, click on the leftmost X button to close the preview window.

3.4.13. Close Adjustment Invoice form

- Click on  to exit from the Adjustment Invoice form.
- You can also exit by clicking on the X button at the top right of the form.
- If you have unsaved invoices during exit, you will be informed that your changes will be lost if you exit.



- Click on Yes if you do want to exit without saving. Click on No, if you don't want to close the form at this time.

Chapter 4

Field

4.1. Form 3

Basic Info

ID: 29 SDP Group: FwV

SDP: Afroja Begum, Shakharia

Reported Month: May Entry Date: 08/05/2008

Reported Year: 2008

Total Form 3 (Filtered) : 3

	Oral Pill (Sukhi) (Cycles)	Condom (Nirapad) (Pcs)	Injectables (o-Provera) (Vials)	Disposable Syringe (nos)	IUD (Pcs)	Implant (Set)	ECP (Dose)	DDS Kit (nos)
Opening Balance	60		1,000	500	20			2
Received this Month								
Balance this Month	60		1,000	500	20			2
Adjustment (+)								
Adjustment (-)								
Total this Month	60		1,000	500	20			2
Distribution this Month								
Closing Balance this Month	60		1,000	500	20			2
Stock Out Reason Code								
Days Stock Out								

Group By: Month:Year > SD

Buttons: New, Save, Undo, Delete, Close

Form 3 is used to enter FWV, Sub Assistant Community Medical Officer (SACMO), NGO and Multi-sectoral data for each commodity.

4.1.1. Open Form 3

- Run UIMS.
- Select Field > Form 3 from menu.
- Form 3 is displayed.

4.1.2. General description of Form 3

Basic Info

ID: SDP Group: SDP: Reported Month: Entry Date: Reported Year:

Total Form 3 (Filtered) : 3

	Oral Pill (Sukhi) (Cycles)	Condom (Nirapad) (Pcs)	Injectables (o-Provera) (Vials)	IUD (Pcs)	Implant (Set)	ECP (Dose)	DDS Kit (Nos)	IUD MSR Kit (Nos)

Group By: Month:Year > SD


Buttons: New, Save, Undo, Delete, Close

This form is used for entering FWV, SACMO, NGO, and Multi-sectoral data of all the items. Controls in the form are grouped into four blocks:


- A. *List of SDPs by Month*: Shows list by month of the FWVs, SACMOs, NGOs, and Multi-sectorals.
- B. *Form 3 Entry Option*: Shows various options for selecting the SDP name, month, and year for which Form 3 is submitted.
- C. *Details of Item*: Details of Items—i.e., Received in this month, Issue of this month, etc.—are entered based on which closing balance is to be calculated.
- D. *Command Buttons*: Buttons available to manipulate Form 3.

4.1.3. Enter a new Form 3

- Click on  in the command buttons block, and the following form appears:

- The ID is generated automatically.
- Entry Date field reflects current date, which you cannot change.
- Select SDP Group and the name of the SDP.
- Select the reported month and year for which Form 3 is being entered.
- Click on , and the following form appears:

4.1.4. Form 3 Details Entry

- Click on  in the command buttons block, and the following dialogue box appears:


- Click on Yes to continue, and the following form appears:

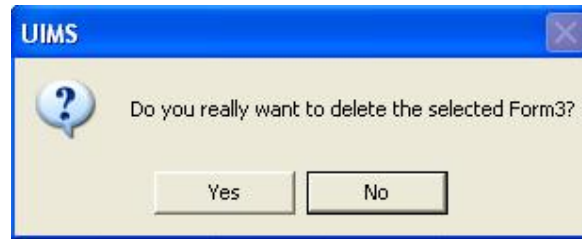
- In this form you have to enter the Distribution figure only. In very few cases you might have to make some Adjustments. Opening balance, Receive of this month, etc. appears automatically and, by default, balance, total, and closing balance of this month are equal to opening balance + receive of this month.
- After entering the distribution figure Closing balance is calculated automatically.
- If there are any stockouts, select the Stock Out Reason from select box in the Stock Out Reason Code field.
- As you go forward by clicking on Tab, data are saved automatically, and the following form appears:

4.1.5. Edit an existing Form 3

- Select the SDP you want to edit from the list of SDPs (Block A).
- Change the fields as necessary.
- When done with editing, click on Save.
- If you want to cancel the current editing, press Esc to undo the changes.

4.1.6. Delete an existing Form3

- Select the SDP you want to remove from SDP list.
- Click on  , and a confirmation dialog box appears:



- Click on Yes if you really want to delete Form 3.
- You will not be able to delete a Form 3 that has items under it. You have to delete the items and then delete Form 3. (How to delete items from Form 3 is explained below.)

4.1.7. Edit an existing Form 3 item

- Select the SDP you want to edit from the list in Block C.

	Oral Pill (Sukhi) (Cycles)	Condom (Nirapad) (Pcs)	Injectables (Provera) (Vials)	IUD (Pcs)	Implant (Set)	ECP (Dose)	DDS Kit (Nos)	IUD MSR Kit (Nos)
Opening Balance	600	600	600	600				
Received this Month	900	900	900	900				
Balance this Month	1,500	1,500	1,500	1,500				

- Press F2 or click on any field to start editing.

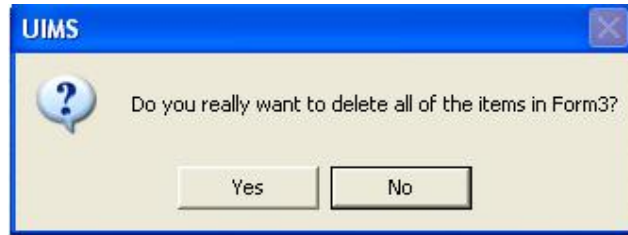
	Oral Pill (Sukhi) (Cycles)	Condom (Nirapad) (Pcs)	Injectables (Provera) (Vials)	IUD (Pcs)	Implant (Set)	ECP (Dose)	DDS Kit (Nos)	IUD MSR Kit (Nos)
Opening Balance	600	600	600	600				
Received this Month	900	900	900	900				
Balance this Month	1,500	1,500	1,500	1,500				

- Change the fields as necessary.
- When done with editing, click on Save.
- If you want to cancel the current editing, press Esc to undo the changes.

4.1.8. Delete an item from Form 3

- Select the SDP you want to delete from the SDP list in Block A.

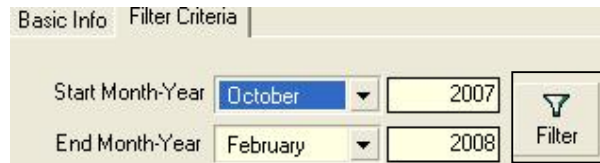
- Click on  , and a confirmation dialog box appears:



- Click on Yes if you really want to delete the invoice item.

4.1.9. Search Forms

- Click the tab, Filter Criteria and select the start and end month and year.
- Then click on Filter, as shown in the following figure:



- Only the filtered months are displayed.

4.2. Form 2

Form 2 is used to enter FWAs' data for each commodity.

4.2.1 Open Form 2

- Run UIMS.
- Select Field > Form 2 from menu.
- Form 2 is displayed.

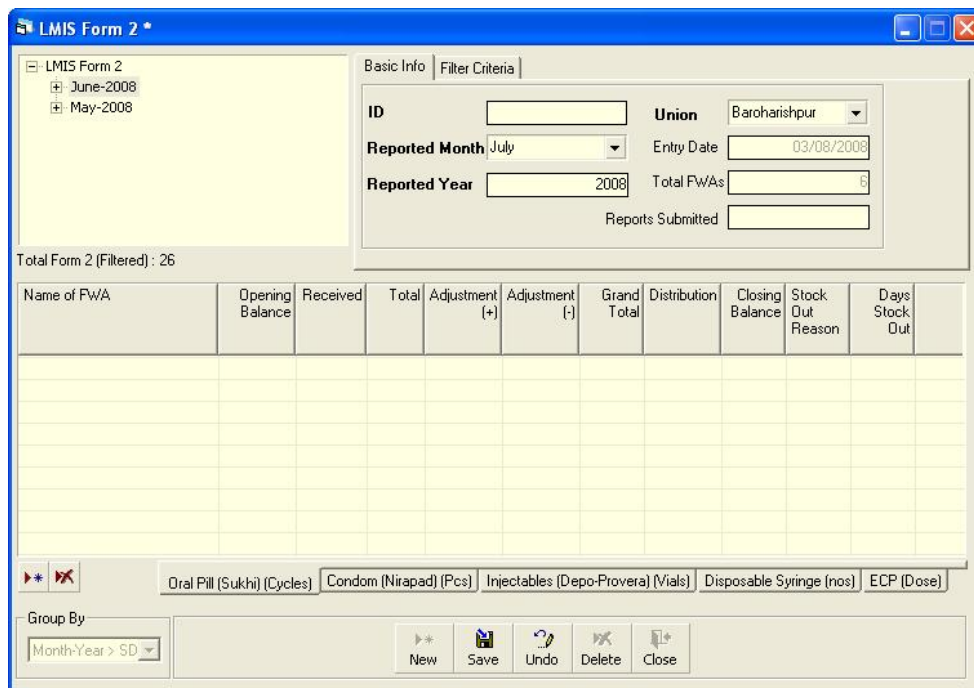
4.2.2. General description of Form 2


This form is used to enter an FWA's data for all of the items. Controls in the form are grouped into four blocks:

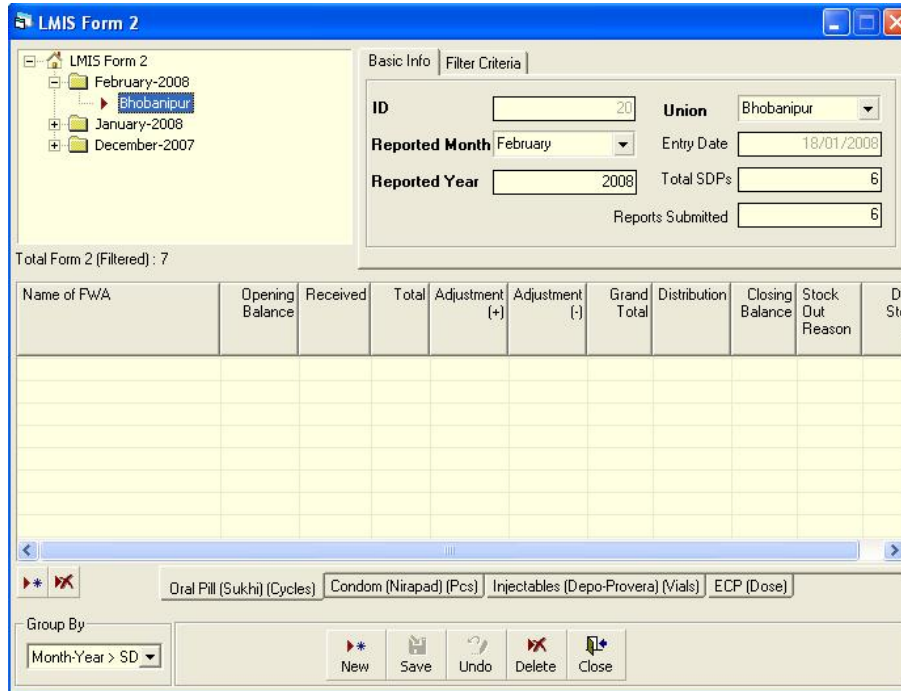
- A. *List of Unions by Month*: Shows the list of union. If you select any of the unions, FWAs of that union are displayed in Block C.
- B. *Form 2 Entry Option*: Shows options for selecting union's name and month and year for which Form 2 is submitted.
- C. *Details of FWAs*: Details of FWAs— i.e., Opening balance, Received in this month, Issue of this month, etc.—are entered based on which closing balance is to be calculated.
- D. *Command Buttons*: Buttons available to manipulate Form 2.

4.2.3. Enter a new Form 2


- Click on  in the command buttons block, and the following form appears:

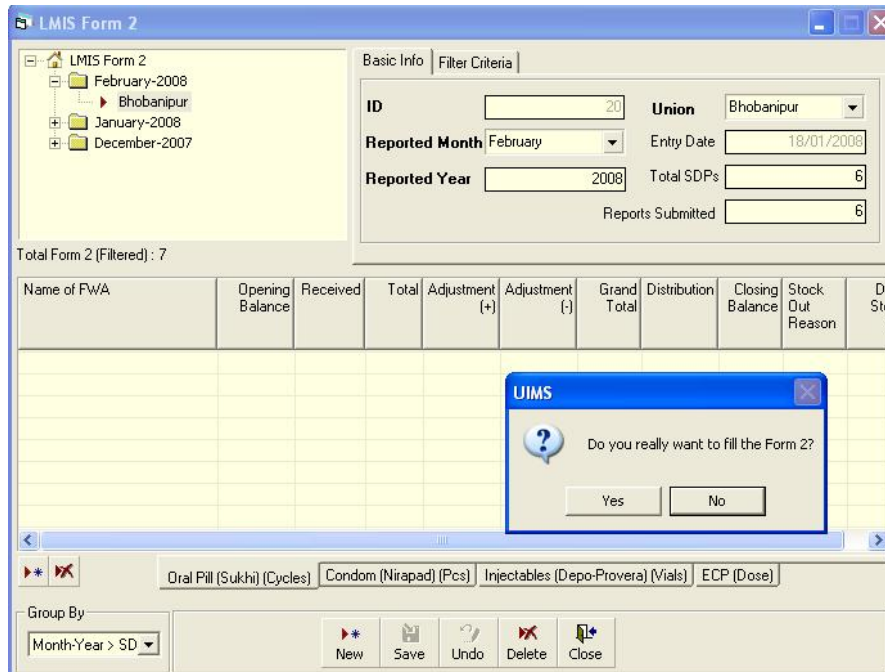


- The ID is generated automatically.
- Entry Date field reflects current date, which you cannot change.
- Select union. Total FWAs of the selected union will appear automatically.
- Select reported month and year for which Form 2 is being entered.
- Enter Total number of FWAs who submitted the Reports (optional).
- Click on , and the following form appears:



4.2.4 Form 2 Details Entry

- Click on  in the command buttons block, and the following dialogue box appears:



- Click on Yes to continue, and the following form appears.

Basic Info | Filter Criteria

ID: 19 Union: Bhobanipur
 Reported Month: February Entry Date: 18/01/2008
 Reported Year: 2008 Total SDPs: 6
 Reports Submitted: 6

Total Form 2 (Filtered) : 7

Name of FWA	Opening Balance	Received	Total	Adjustment (+)	Adjustment (-)	Grand Total	Distribution	Closing Balance
Aleya Khatun, 3/Kha, Bhobanipur	137		137			137		137
Julekha Begum, 3/Ka, Bhobanipur	2,610		2,610			2,610		2,610
Nasrin Sultana, 2/Kha, Bhobanipur	1,700		1,700			1,700		1,700
Saleha Khatun, 1/Ka, Bhobanipur	80		80			80		80
Sheheli Khatun, 1/Kha, Bhobanipur	50		50			50		50
Sufia Begum, 2/Ka, Bhobanipur	121		121			121		121

Group By: Month-Year > SD

Oral Pill (Sukhi) (Cycles) | Condom (Nirapad) (Pcs) | Injectables (Depo-Provera) (Vials) | ECP (Dose)

New Save Undo Delete Close

- Name of the FWAs of the selected union appear automatically.
- In this form you have to enter the Distribution figure only. In very few cases you might have to make some Adjustments. Opening balance, Receive of this month, etc. appears automatically and, by default, balance, total, and closing balance of this month are equal to opening balance + receive of this month.
- Closing balance is calculated automatically.
- If there any stockouts, select the Stock Out Reason from select box in the Stock Out Reason Code field.
- As you go forward by pressing the Tab button, data are saved automatically and the following form below appears.
- Same procedures have to be followed for all contraceptives, i.e. pills, condoms, injectables, and emergency contraceptive pills (ECPs). Data will appear automatically for disposable syringes.

Basic Info | Filter Criteria

ID: 19 Union: Bhobanipur
 Reported Month: February Entry Date: 18/01/2008
 Reported Year: 2008 Total SDPs: 6
 Reports Submitted: 6

Total Form 2 (Filtered) : 7

Name of FWA	Opening Balance	Received	Total	Adjustment (+)	Adjustment (-)	Grand Total	Distribution	Closing Balance	St O R C o d e
Aleya Khatun, 3/Kha, Bhobanipur	137	100	237			237	56	181	
Julekha Begum, 3/Ka, Bhobanipur	2,610	1,563	4,173			4,173	3,000	1,173	
Nasrin Sultana, 2/Kha, Bhobanipur	1,700	1,000	2,700			2,700	2,000	700	
Saleha Khatun, 1/Ka, Bhobanipur	80	100	180			180	123	57	
Sheheli Khatun, 1/Kha, Bhobanipur	50	156	206			206	203	3	
Sufia Begum, 2/Ka, Bhobanipur	121	1,000	1,121			1,121	650	471	

Group By: Month-Year > SD


Oral Pill (Sukhi) (Cycles) | Condom (Nirapad) (Pcs) | Injectables (Depo-Provera) (Vials) | ECP (Dose)

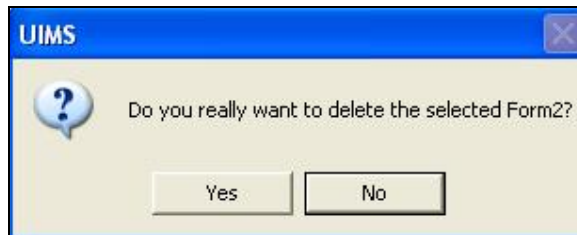
New Save Undo Delete Close

4.2.5. Edit an existing Form 2

- Select the union you want to edit from the list of unions (Block A).
- Change the fields as necessary.
- When done with editing, click on Save.
- If you want to cancel the current editing, press Esc to undo the changes.

4.2.6. Delete an existing Form2

- Select the union you want to remove from union list.
- Click on  , and a confirmation dialog box appears:



- Click on Yes if you really want to delete Form 2.
- You will not be able to delete a Form 2 that has items under it. Delete the items first and then delete Form 2. (How to delete items from Form 2 is explained below.)

4.2.7. Edit an existing Form 2 item

- Select the invoice item you want to edit from the items list in Block C.


Name of FWA	Opening Balance	Received	Total	Adjustment (+)	Adjustment (-)	Grand Total	Distribution	Closing Balance	Stock Out Reason	D Str I
Aleya Khatun, 3/Kha, Bh...	2,000	1,000	3,000			3,000	1,963	1,037		
Julekha Begum, 3/Ka, Bh...	4,000	500	4,500			4,500	1,890	2,610		

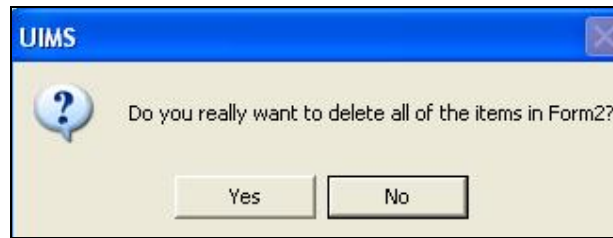
- Press F2 or click on any field to start editing.

Name of FWA	Opening Balance	Received	Total	Adjustment (+)	Adjustment (-)	Grand Total	Distribution	Closing Balance	Stock Out Reason	D Str I
hatun, 3/Kha, Bhobanipur	2,000	1,000	3,000			3,000	1,963	1,037		
Julekha Begum, 3/Ka, Bh...	4,000	500	4,500			4,500	1,890	2,610		

- Change the fields as necessary.
- When done with editing, click on Save.
- If you want to cancel the current editing, press Esc to undo the changes.

4.2.8. Delete an item from Form 2

- Select the union you want to delete from the union list in Block A.
- Select the item— i.e. pill, condom, injectable, or ECP.
- Click on  , and a confirmation dialog box appears:



- Click on Yes if you really want to delete the invoice item.

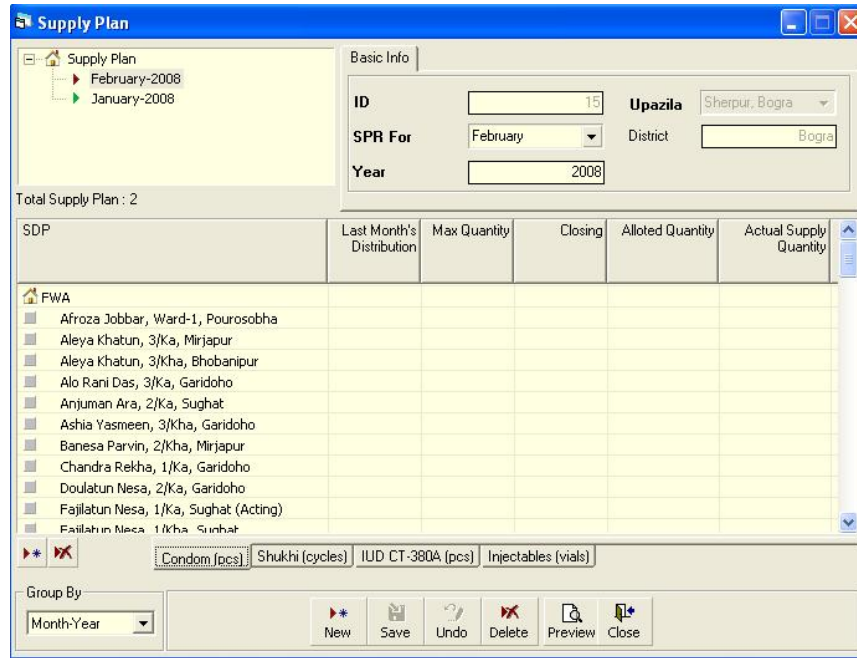
4.2.9. Search Forms

- Click the tab, Filter Criteria, and select start and end month and year.
- Then click on Filter, as shown in the following figure:

A screenshot of the "Filter Criteria" tab in the UIMS application. The tab is selected and highlighted. Below the tab, there are two rows of input fields. The first row is labeled "Start Month-Year" and contains a dropdown menu with "October" selected, a text box with "2007", and a "Filter" button with a funnel icon. The second row is labeled "End Month-Year" and contains a dropdown menu with "February" selected, a text box with "2008", and the same "Filter" button.

- Only the filtered months are displayed in the Block A

4.3. Supply Plan

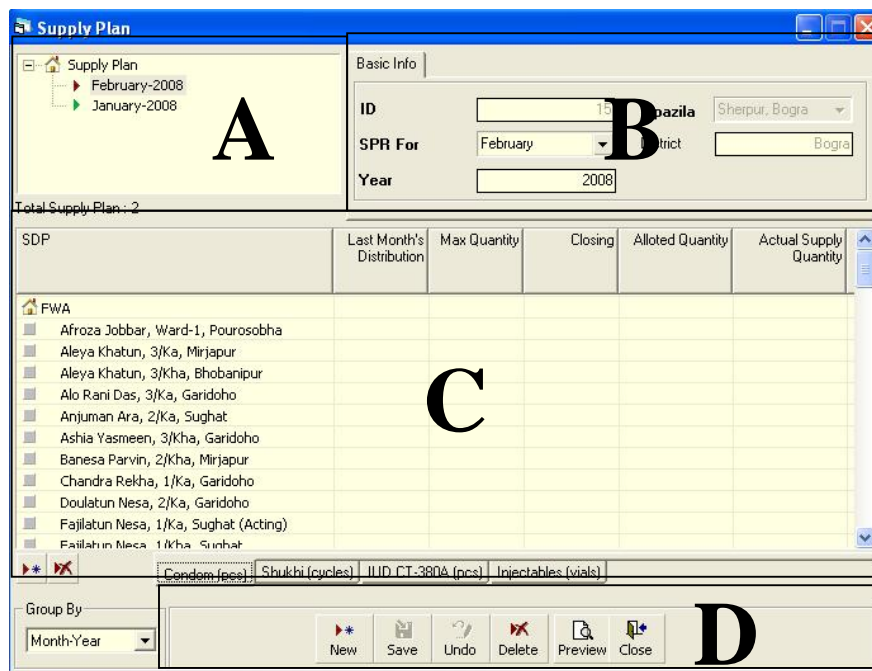


Based on the inputs from various SDPs, this module generates a supply plan automatically.

4.3.1 Open Supply Plan

- Run UIMS.
- Select Field > Supply Plan from menu.
- The Supply Plan Screen is displayed.


4.3.2. General description of Supply Plan Screen

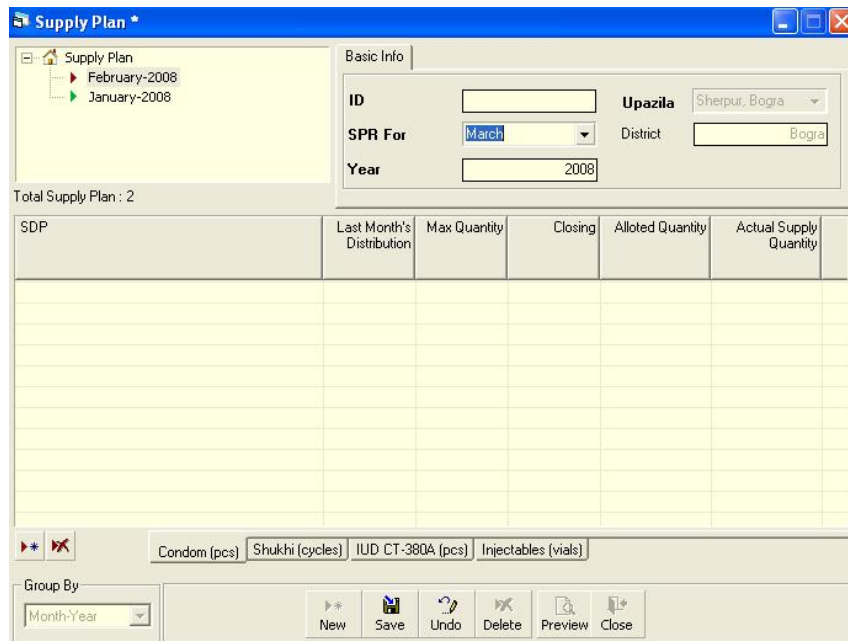



Controls in the form are grouped into four blocks:

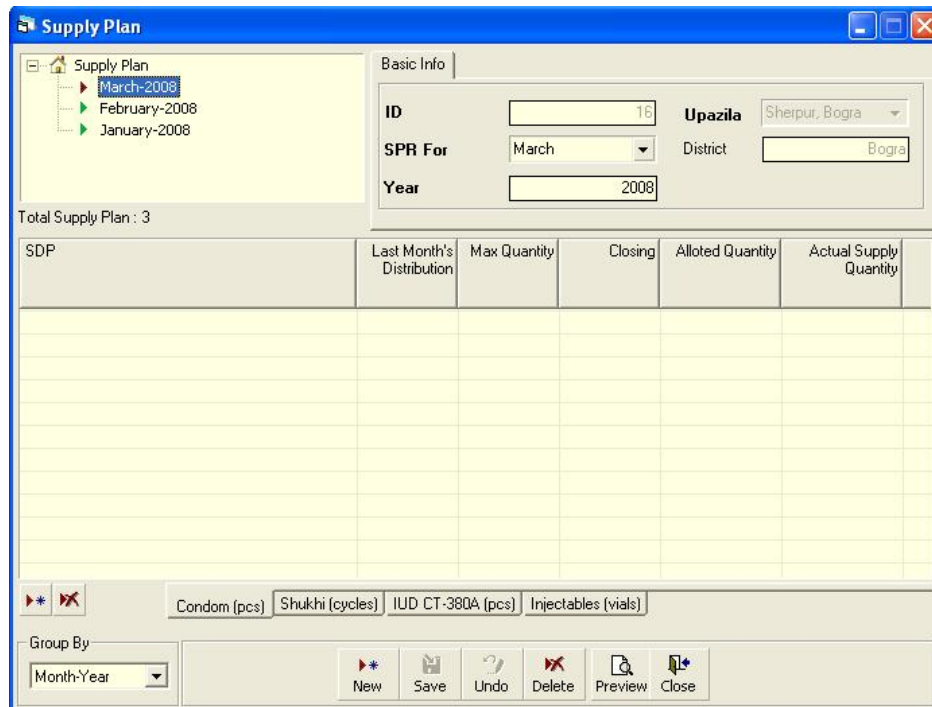
- A. *List of Months*: Shows the months for which Supply Plan is to be generated.
- B. *Supply Plan Entry Option*: Shows options for selecting month and year for which Supply Plan is to be generated
- C. *Details of SDPs*: Details of FWAs, FWVs, SACMOs, NGOs—i.e. how much they have distributed last month, their closing balance, what should be the allotted quantity, etc.—are shown here
- D. *Command Buttons*: Buttons available to manipulate the Supply Plan.

4.3.3. Generate a new Supply Plan


- Click on  in the command buttons block, and the following form appears:

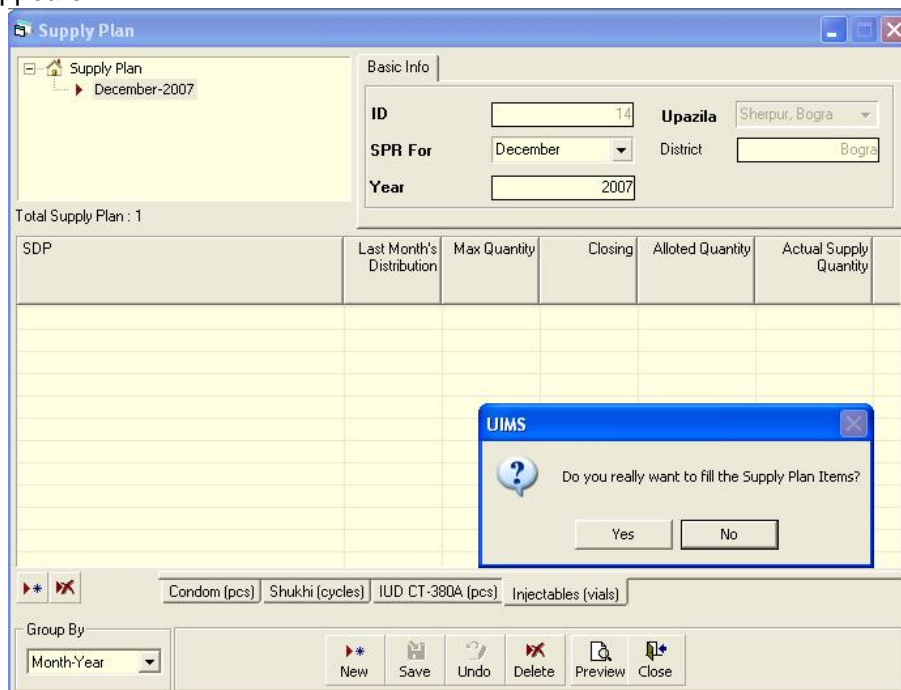


- The ID, Upazila, and District are generated automatically.
- Select the month and year for which Supply Plan is to be generated.
- Click on , and the following form appears:

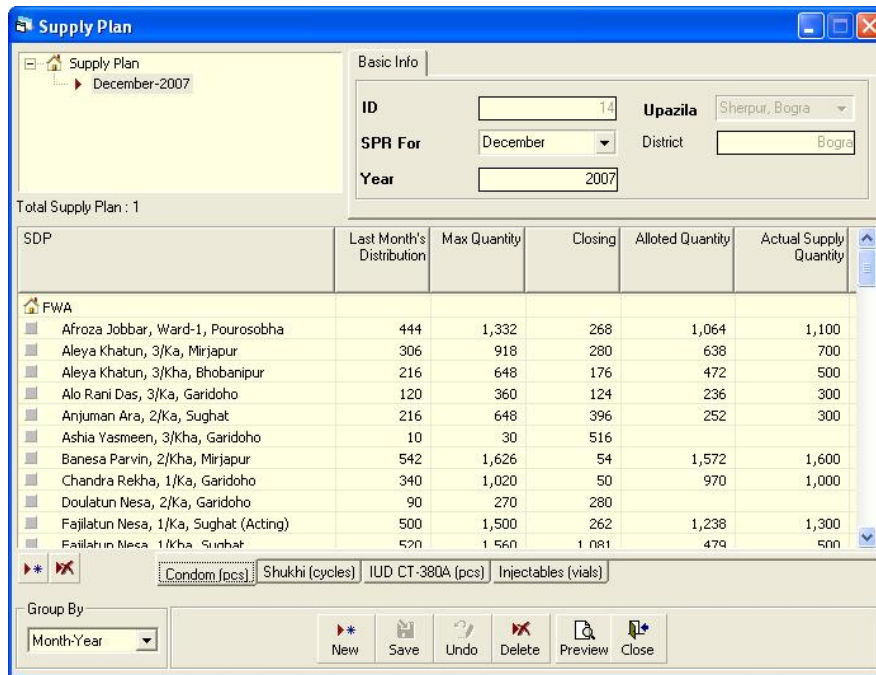


4.3.4. Generation of Supply Plan Details

- Click on  in the command buttons block, and the following dialogue box appears:




- Click on Yes to continue, and the following form appears:



- All data are generated and shown automatically.
- Only Actual supply Quantity can be edited.
- Enter the actual quantity that has been supplied to the SDPs.
- As you go forward by pressing Tab button, data are saved automatically.

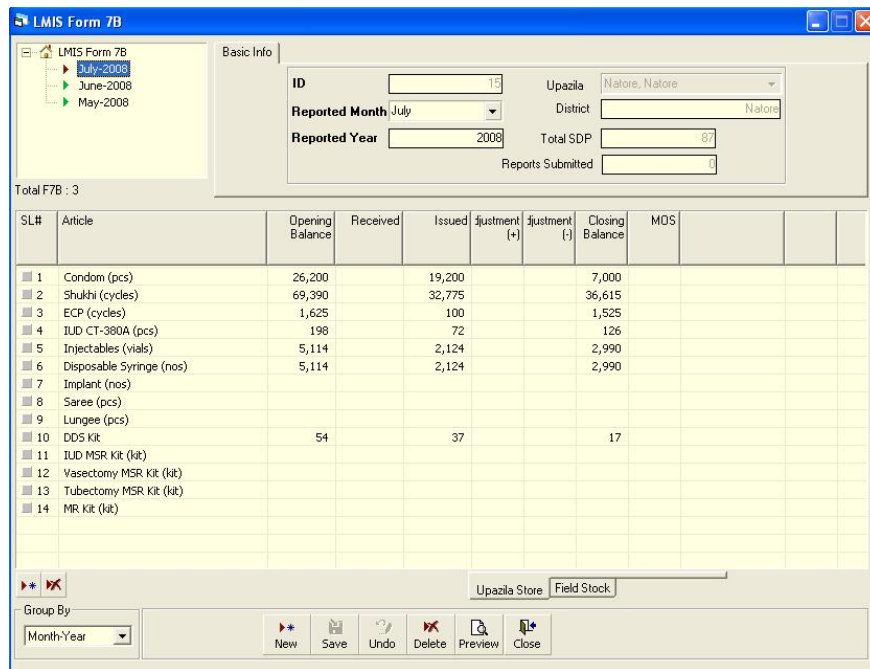
4.3.5. Preview and Print the Supply Plan

- Click on  to preview the supply plan, which is similar to the following figure:

Supply Plan Register														
Upazila: Sherpur Month: December Year: 2007														
Condom Shukhi Depo-Preve														
Name of the Worker	Designation	LMD	MaxQty	CBL	QtyTBS	QtyAS	LMD	MaxQty	CBL	QtyTBS	QtyAS	LMD	MaxQty	CBL
Afroza Jobbar, Ward-1, Pourosobha	FWA	444	1,332	268	1,064	1,100	258	774	460	284	285	5	15	4
Aleya Khatun, 3/Ka, Mirjapur	FWA	306	918	280	638	700	311	933	654	379	390	5	15	2
Aleya Khatun, 3/Kha, Bhoanipur	FWA	216	648	176	472	500	276	828	796	32	45	0	10	10
Alo Rani Das, 3/Ka, Garidoho	FWA	120	360	124	236	300	363	1,089	719	370	375	5	15	10
Anjuman Ara, 2/Ka, Sughat	FWA	216	648	396	252	300	476	1,428	1,183	246	255	0	7	7
Ashia Yasmeen, 3/Kha, Garidoho	FWA	10	30	516	0	0	328	984	605	379	390	10	30	16
Banesa Parvin, 2/Kha, Mirjapur	FWA	542	1,626	54	1,672	1,600	591	1,773	883	910	915	1	3	9
Chandra Rekha, 1/Ka, Garidoho	FWA	340	1,020	50	970	1,000	522	1,566	533	1,033	1,035	17	51	7
Doulatun Nesa, 2/Ka, Garidoho	FWA	90	270	280	0	0	325	975	425	650	555	6	18	24
Fajilatun Nesa, 1/Ka, Sughat (Acting)	FWA	500	1,500	262	1,238	1,300	644	1,932	1,130	802	810	0	8	8
Fajilatun Nesa, 1/Kha, Sughat	FWA	520	1,560	1,081	479	500	542	1,626	939	687	690	1	3	9
Fatema Khatun, 1/Kha, KhamarKandi	FWA	48	144	20	124	200	140	420	168	252	255	15	45	6
Forida Yasmeen, 1/Ka, KhamarKandi	FWA	116	348	364	0	0	192	576	685	0	0	30	90	6
Hajera Khatun, 1/Ka, Bishalpur	FWA	48	144	167	0	0	438	1,314	1,403	0	0	3	9	3
Hajera Khatun, 1/Kha, Bishalpur (Acting)	FWA	48	144	323	0	0	600	1,800	1,042	758	765	0	5	5
Hosne Ara Begum, 2/Kha, Garidoho	FWA	100	300	60	240	300	616	1,848	229	1,619	1,620	30	90	0
Hosne Ara, 1/Ka, Khanpur	FWA	442	1,326	665	661	700	538	1,614	1,109	505	510	8	24	2
Iron Nesa, 2/Kha, KhamarKandi	FWA	629	1,887	1,325	662	600	303	909	780	119	120	5	15	10
Isnot Ara, 3/Kha, KhamarKandi	FWA	216	648	271	377	400	662	1,986	355	1,331	1,335	0	10	10
Jahanara Hoque, Ward-3, Pourosobha	FWA	528	1,584	926	658	700	286	858	538	320	330	0	10	10
Jakia Sultana, 2/Kha, Sughat	FWA	288	864	444	420	500	324	972	846	127	135	0	10	10
Jinat Rehana, 3/Kha, Khanpur	FWA	338	1,014	679	335	400	538	1,614	674	940	945	3	9	7
Julekha Begum, 3/Ka, Bhoanipur	FWA	368	1,104	464	640	700	353	1,059	523	536	540	2	6	16
Kohinur Begum, 1/Ka, Mirjapur	FWA	180	540	149	391	400	474	1,422	887	635	640	2	6	13
Kulsum Begum, 2/Ka, KhamarKandi	FWA	72	216	227	0	0	302	906	342	564	570	2	6	7
Mahmuda Khatun, 1/Kha, Simabari	FWA	108	324	180	144	200	172	516	646	0	0	5	15	5
Majeda Khatun, 1/Kha, Garidoho	FWA	160	480	60	420	500	355	1,065	455	610	615	9	27	63
Mohsena Banu, Ward-2, Pourosobha	FWA	60	180	101	79	100	228	684	672	112	120	7	21	11

- Click on the printer icon, and print dialog box appears.
- You can provide Print Range, Copies and click on OK. If you want to print only one copy of the whole report, then just click on OK.
- After printing, click on the leftmost X button to close the preview window.

4.4. Form 7B

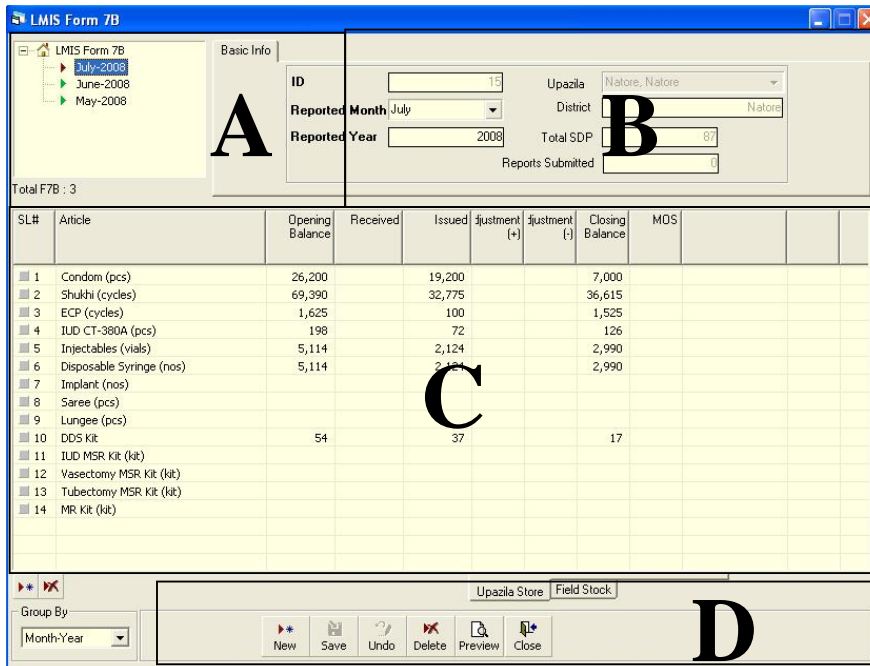


Based on the inputs given from various SDPs and items received and issued by the Upazila MIS, this module generates Form 7B automatically.

4.4.1. Open Form 7B

- Run UIMS.
- Select Field > Form 7B from menu.
- Form 7B Screen is displayed.

4.4.2. General description of Supply Plan Screen




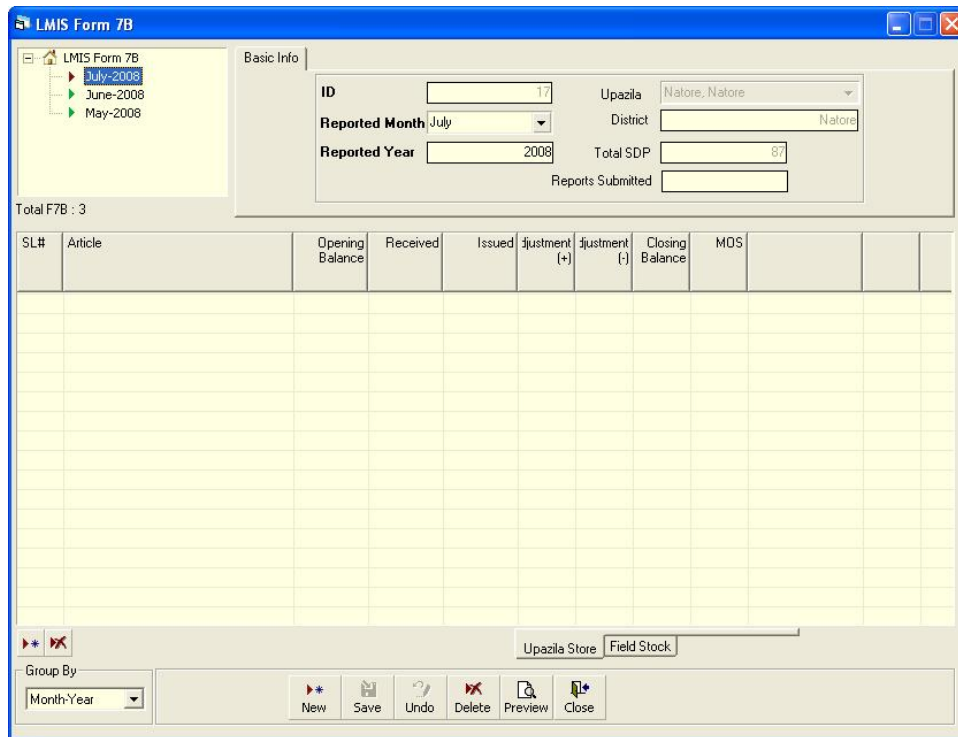
Controls in the form are grouped into four blocks:

- A. *List of Months*: Shows the months for which Form 7B is to be generated.
- B. *Form 7B Entry Option*: Shows options for selecting month and year for which Form 7B is to be generated
- C. *Details of Items*: Details of all 14 commodities—i.e., Opening Balance; how much has been received, issued, and adjusted; Closing Balance; months of supply (MOS), etc. —are displayed here
- D. *Command Buttons*: Buttons available to manipulate Form 7B.


4.4.3. Generate a new Form 7B

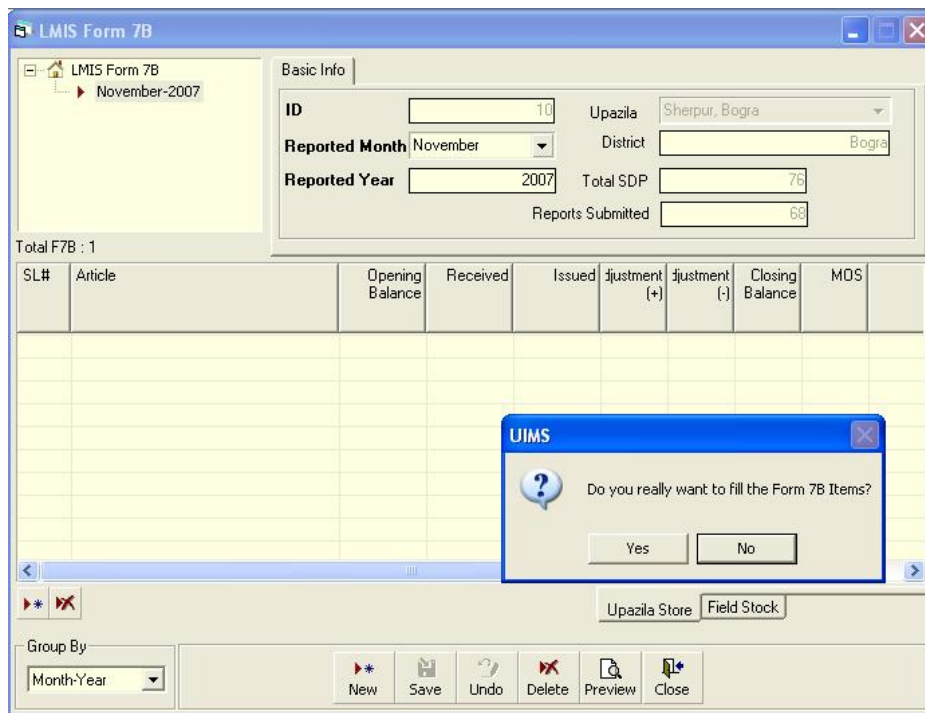
- Click on  in the command buttons block, and the following form appears:

- Each option except month and year are generated automatically.
- Select the month and year for which Form 7B is to be generated.
- Click on , and the following form appears:



4.4.4. Generation of Form 7B Details


- Click on  in the command buttons block, and the following dialogue box appears:




- Click Yes to continue, and the following form appears.

- All data are generated automatically.

4.4.5. Preview and Print Form 7B

- Click on  to preview the supply plan, and a form similar to the

<p style="text-align: center;">  GOVERNMENT OF THE PEOPLE'S REPUBLIC OF BANGLADESH DIRECTORATE GENERAL OF FAMILY PLANNING MIS Unit, Karwanbazar, Dhaka </p>																	
Form 7B																	
UPAZILA MONTHLY SUPPLY, DISTRIBUTION & STOCK BALANCE REPORT																	
WH: BOGRA District: Bogra Upazila: Sherpur Month: November Year: 2007 Total SDP*: 76 Report Submitted: 68																	
SN	Article	Closing Balance	Upazila Storeroom (Usable Articles)						Field Stock: From MIS Form 2,3 and NGOs Taking Supplies From Upazila FP Store						Total Usable Stock Balance (9+16)		
			Opening Balance	Received (+)	Issued (-)	Adjustment		Closing Balance	MOS	Opening Balance	Received (+)	Distributed to Acceptors (-)	Adjustment			Closing Balance	MOS
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
1	Condom (pcs)	1,200						1,200	0.1	31,241	10,700	16,074			25,867	1.6	27,067
2	Shukhi (cycles)	174,360						174,360	7.5	48,294	18,046	23,334			43,005	1.8	217,365
3	ECP (cycles)	1,550						1,550	34.4	946	60	45			961	21.4	2,511
4	IUD C.T-380A (pcs)	129						129	2.2	86	45	60			71	1.2	200
5	Injectables (vials)	2,871						2,871	1.7	3,574	740	1,673			2,641	1.6	5,512
6	Disposable Syringe (nos)	2,871						2,871									
7	Implant (nos)	0						0	0.0	94	50	50			94	1.9	94
8	Saree (pcs)	0						0									
9	Lunges (pcs)	0						0									
10	DDS Kit (kit)	206						206	12.1	10	21	17			14	0.8	220
11	IUD MSR Kit (kit)	0						0									
12	Vasectomy MSR Kit (kit)	0						0									
13	Tubectomy MSR Kit (kit)	0						0									
14	MR Kit (kit)	10						10									

*SDP=FWAs, FWVs/SACMOs, NGOs and Multi-sectoral

- Click on the printer icon, and the print dialog box appears.
- You can provide Print Range, Copies and click on OK. If you want to print only one copy of the whole report, then just click on OK.
- After printing, click on the leftmost X button to close the preview window.

Chapter 5

Stock

5.1. Stock Balance

Stock Balance

Item Group: (ALL) Balance Date: 11/01/2008
Items in Group: 717

Item Code	Item Name	Usable Qty	Unusable Qty	Unit
COM012	GAUZE	15		roll
COM028	INJ. PATHEDINE 50 MG			amp.
COM025	INJ. PENTAZOCINE (30MG)			amp.
COM004	INSTRUMENT TROLLY	1		pcs
COM027	IRON COT			pcs
COM005	IUD KITS			kit
COM018	MATRESS FOAM			pcs
COM017	RUBBER GLOVES 6.5"	280		pair
COM016	RUBBER GLOVES 7"			pair
COM022	SAREE			pcs
COM006	SAVLON/CITRIMIDE SOLUTI...			jar
COM014	STETHESCOPE	2		pcs
COM009	TAB. IRON	11,862		tablet
COM007	TAB. METRONIDAZOL			tablet
COM008	TAB. PARACETAMOL	2,580		tablet

Details Preview Lotwise Search Close

Show Only Non-Zero Stock
 Show Only Zero Stock
 Show All Items

Stock Balance form presents the current status of stock items at any time. Initially, the form shows stock balance of all stock items up to current date. Stock balance of any date can be viewed by changing the Balance Date.

5.1.1. View Stock Balance

- Run UIMS.
- Select Stock > Stock Balance from main menu.
- Stock Balance form is displayed.

5.1.2. General description of Stock Balance form

Stock Balance

Item Group: (ALL) Balance Date: 11/01/2008
Items in Group: 717

Item Code	Item Name	Usable Qty	Unusable Qty	Unit
COM012	GAUZE	15		roll
COM028	INJ. PATHEDINE 50 MG			amp.
COM025	INJ. PENTAZOCINE (30MG)			amp.
COM004	INSTRUMENT TROLLY	1		pcs
COM027	IRON COT			pcs
COM005	IUD KITS			kit
COM018	MATRESS FOAM			pcs
COM017	RUBBER GLOVES 6.5"	280		pair
COM016	RUBBER GLOVES 7"			pair
COM022	SAREE			pcs
COM006	SAVLON/CITRIMIDE SOLUTI...			jar
COM014	STETHESCOPE	2		pcs
COM009	TAB. IRON	11,862		tablet
COM007	TAB. METRONIDAZOL			tablet
COM008	TAB. PARACETAMOL	2,580		tablet

Details Preview Lotwise Search Close

Show Only Non-Zero Stock
 Show Only Zero Stock
 Show All Items


This form presents current stock position of all the items. Controls in the form are grouped into three blocks:

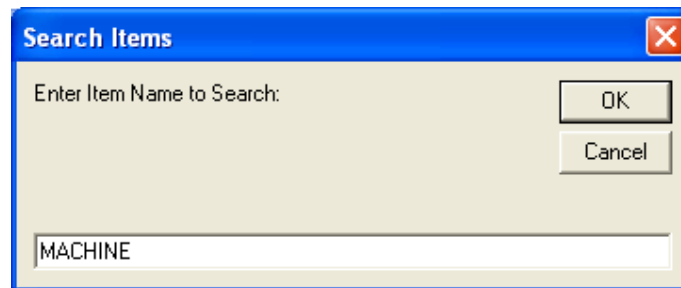
- E. *Item Group & Balance Date*: Shows a list of current item groups in database. A label below shows the total number of items under the selected group. Balance Date gives a filter date for which stock position is shown.
- F. *List of Items*: Shows status of every item under the selected group. To describe an item, five fields are required.
 - Item Code—Unique Item Code
 - Item Name—Name of item
 - Usable Qty.—Usable stock quantity of item on balance data
 - Unusable Qty.—Unusable quantity of item on balance date
 - Unit—Unit of measurement of item
- G. *Command Buttons*: Buttons available to manipulate the stock status.

5.1.3. View stock balance of a specific date

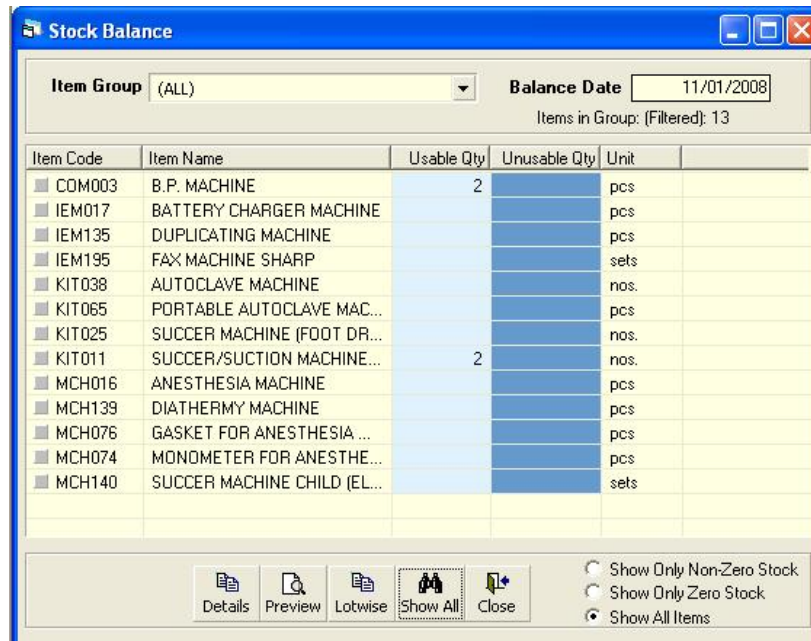
- If you want to view stock status of all items, select (ALL) from Item Group combo in Block A. If you want to view a specific group, select the group name from the combo.
- Initially, Balance Date reflects today's date, and stock status for that date is displayed.
- Type in the desired date in Balance Date field and press Enter to get the stock status of that date.
- To exclude the items that are out of stock, select Show Only Non-Zero Stock.

5.1.4. Search and find an Item

- Click on  in command buttons Block C, and a new dialog box appears asking you to give item name to search. You can provide a partial item name.



- After you provide the item name, click on OK.
- Items that match the search text are displayed in the list, as shown below:

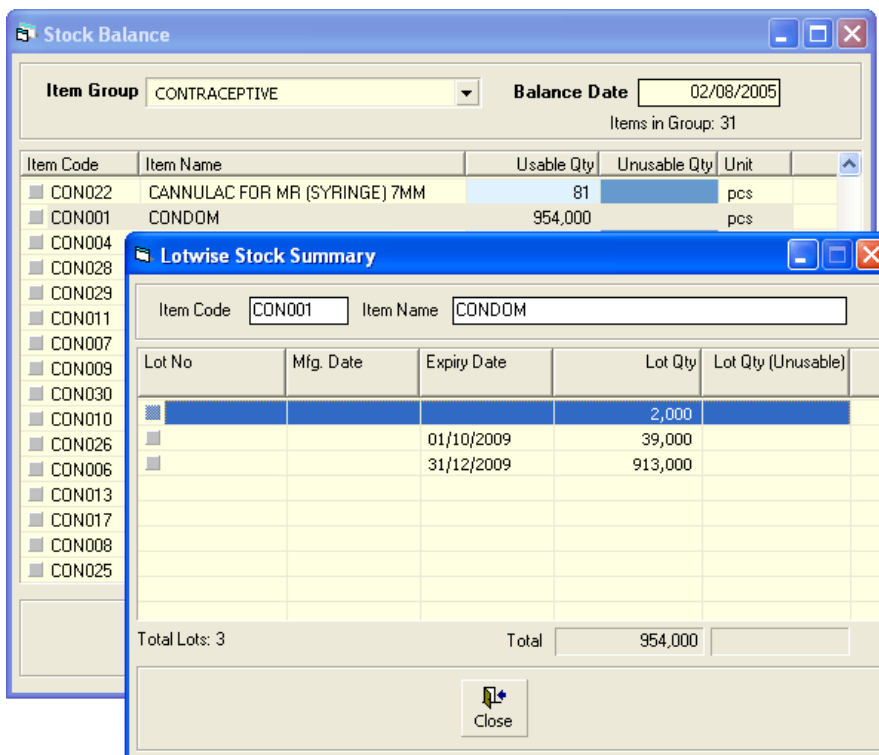


- To see all of the items again, click on



5.1.5. View Lotwise information about a specific item

- Select the item for which you want to view Lotwise information.
- Click on Lotwise in the command button block, and the following dialog appears:



5.1.6. Print Stock Balance



Click on **Preview** to view a printable list of stock balance.

**Upazila Family Planning Office
Sherpur, Bogra**

Stock Balance

As on : December 29, 2007

<i>Group</i>	<i>Item Code</i>	<i>Item Name</i>	<i>Usable Qty</i>	<i>Unusable Qty</i>	<i>Unit</i>
COMMON MEDICINE					
	COM001	AMBU BAG	2		pcs
	COM003	B.P. MACHINE	2		pcs
	COM010	COTTON (100 GRAM)	808		roll
	COM012	GAUZE	15		roll
	COM006	SAVLON/CITRIMIDE SOLUTION (1 LITRE JAR)	9		jar
	COM014	STETHESCOPE	2		pcs
	COM009	TAB. IRON	18,728		tablet
	COM008	TAB. PARACETAMOL	3,670		tablet
COMMON MEDICINE Total: 8					

- Click on the printer icon, and the print dialog box appears.
- You can provide Print Range, Copies and click on OK. If you want to print only one copy of the whole report, then just click on OK.
- After printing, click on the leftmost X button to close the preview window.

5.1.7. Close Stock Balance form



- Click on **Close** to exit the Stock Balance form.
- You can also exit by clicking on the X button at the top right of the form.


5.2. Stock Reports

The form is used to view stock reports based on specific criteria. Both summary and detailed stock information can be printed. A typical view of the Stock Summary form appears below:

The controls in the form are grouped in five blocks:

- A. *List of Reports*: Currently there are three reports; the first is a summary report and the others reflect transaction details.
- B. *Filter Dates*: Provide the date(s) used to filter the report data.
- C. *Zero/Non-Zero Stock*: Provide option to select Show Only Zero Stock or Show Only Non-Zero Stock.
- D. *Group/Item and Facility Criteria*: A number of optional filter criteria control the report's output.
- E. *Command Buttons*: A Preview and Close button.

5.2.1. How to print a report

- Select a report from the List of Reports.
- Provide date(s) in the Filter Date(s) block.
- You can select options from Group/Item and Facility Criteria (Block D).
- Click on  to preview the invoice.
- Click on the printer icon, and the print dialog box appears.
- You can provide Print Range, Copies and click on OK. If you want to print only one copy of the whole report, then just click on OK.
- After printing, click on the leftmost X button to close the preview window.

5.2.2. Stock Summary

This report shows stock status on a certain date. To print the report, follow these steps:

- Select Stock Summary in List of Reports block, and the following dialog box appears:

- The Summary Date box reflects current date, and (ALL) is selected in the Item Group box. If you click on Preview now, stock summary of all the items on current date is printed.
- If you want to know the stock status of a previous date, type the date in Summary Date box.
- To print stock status of a specific group, select the group from Item Group box, and the following form may appear:

- Click on Preview to continue.

Upazila Family Planning Office Sherpur, Bogra Stock Balance As on : January 12, 2008					
Group	Item Code	Item Name	Usable Qty	Unusable Qty	Unit
CONTRACEPTIVE					
	CON017	1ML. DISPOSABLE SYRINGE	1,087		pos
	CON003	CT-380A	20		pos
	CON016	DDS KIT FOR FP & MCH-SERVICES (27 ITEMS).	206		carton
	CON004	DEPO-PROVERA/ PETOGEN	1,087		vials
	CON007	MR KITS (SYRINGE)	11		pos
	CON015	POSTINOR-2 (ECP)	1,520		dose
	CON002	SHUKHI	160,050		cycle
CONTRACEPTIVE Total: 7					
Grand Total Items: 7					

5.2.3. Stock Summary by Lot

This report shows the stock status by lot at a certain date. To print the report, follow these steps:

- Select Stock Summary by Lot in List of Reports block, and the following form appears:

The screenshot shows a window titled "Stock Reports" with the following fields and options:

- List of Reports:**
 - Stock Summary
 - Stock Summary by Lot
 - Stock Details by Product
 - Stock Details by Facility
- Filter Date(s):**
 - Summary Date:
 - Show Only Non-Zero Stock
 - Show Only Zero Stock
 - Show All Items
- Group/Item and Facility Criteria:**
 - Item Group:
- Buttons:** Preview, Close

- The Summary Date box reflects current date, and (ALL) is selected in Item Group box. If you click on Preview now, stock summary of all the items on current date is printed.
- If you want to know the stock status of a previous date, type the date in Summary Date box.

- To print stock status of a specific group, select the group from Item Group box, and the following form may appear:

- Click on Preview to continue.

Upazila Family Planning Office Sherpur, Bogra							
Lotwise Stock Balance							
As on : January 12, 2008							
Item Code	Item Name	Lot No	Mfg Date	Exp Date	Usable Qty	Unusable Qty	Unit
CONTRACEPTIVE							
CON017	1ML. DISPOSABLE SYRINGE	1		30/09/2011	287		pcs
					800		pcs
1ML. DISPOSABLE SYRINGE Total:					1,087		
CON003	CT-380A	1			20		pcs
CON016	DDS KIT FOR FP & MCH-SERVICES (27 ITEMS).	1			206		carton
CON004	DEPO-PROVERA/ PETOGEN	1		30/06/2010	287		vials
					800		vials
DEPO-PROVERA/ PETOGEN Total:					1,087		
CON007	MR KITS (SYRINGE)	1			10		pcs

5.2.4. Stock Details by Product

This report shows the details transaction of items between specific dates. To print the report, follow these steps:

- Select Stock Details by Product in List of Reports block, and a form similar the one below appears:



Stock Reports

List of Reports

- Stock Summary
- Stock Summary by Lot
- Stock Details by Product
- Stock Details by Facility

Filter Date(s)

Start Date

End Date

Group/Item and Facility Criteria

Item Group

Item Name

- The End Date box reflects current date, and (ALL) is selected in the Item Group box. If you click on Preview now, stock details of all the items on current date are printed.
- To view report between two dates, provide the dates in Start Date and End Date boxes.
- You can select an Item Group and then an Item Name, after which the following form may appear:



Stock Reports

List of Reports

- Stock Summary
- Stock Summary by Lot
- Stock Details by Product
- Stock Details by Facility

Filter Date(s)

Start Date

End Date

Group/Item and Facility Criteria

Item Group

Item Name

- Click on Preview to continue

Upazila Family Planning Office Sherpur, Bogra Stock Details between January 01, 2007 and January 12, 2008										
Group: CONTRACEPTIVE										
CON001 - CONDOM										
Supplier	Receiver	Invoice No	Stock Date	Received Qty	Issued Qty	Unusable In	Unusable Out	Usable Balance	Unusable Balance	
-	-	PREV BALANCE J 1 W 07 H 1		1200				1200		
-	Meherun Nesa, Sadar	13	D/08H1		500			700		
-	Bilbis Begum, Kushumbi	14	D/08H1		100			600		
-	Roksana Parvin, Bhekanipur	15	D/08H1		200			400		
-	Nasima Akhter, Bishalpur	16	D/08H1		100			300		
-	Nurun Nahar Begum, Simabari	17	D/08H1		200			100		
<i>Item Total:</i>				1,200	1,200					

5.2.5. Stock Details by Facility

This report shows the details of issued items by facility between specific dates. To print the report, follow these steps:

- Select Stock Details by Facility in List of Reports block, and a form similar to the following appears:

- The End Date box reflects current date, and (ALL) is selected in Item Group box. If you click on Preview now, stock details of all the items on current date are printed.
- To view report between two dates, provide the dates in Start Date and End Date boxes.
- You can select an Item Group and then an Item Name.
- You can also provide a specific facility, and the following form may appear:

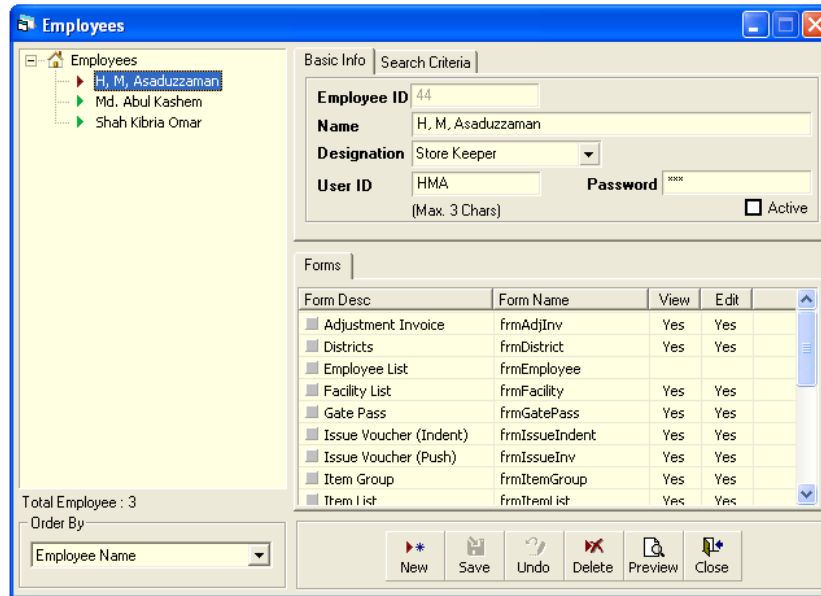
- Click on Preview to continue.

Upazila Family Planning Office
Sherpur, Bogra
Stock Details by Facility
between January 01, 2007 and January 12, 2008

<i>Facility</i>	<i>Item Code</i>	<i>Item Name</i>	<i>Invoice No</i>	<i>Issue Date</i>	<i>Issued Qty</i>
Bilkis Begum, Kushumbi	CON001	CONDOM	60	13/12/2007	100
<i>Facility Total:</i>					100
<i>Grand Total:</i>					100

Chapter 6
Administration

6.1. Employees

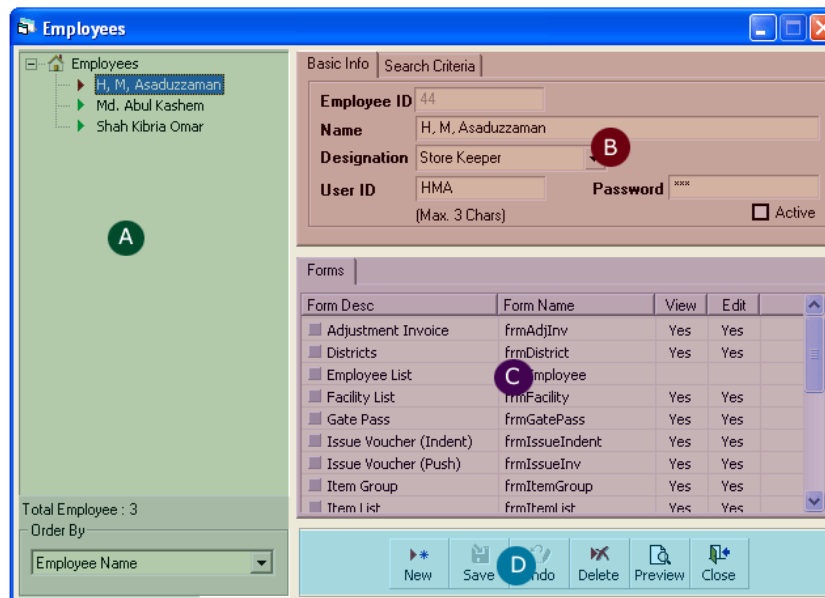


The Employees form contains the names of employees and their permissions in different data entry forms. Employees who are relevant to the UIMS software should be listed using this form. Every user has one User Id and Password they use to enter the software.

6.1.1. View Employees

- Run UIMS.
- Select Administration > Employees from menu.
- Employees form is displayed.

General description of Employees form




This form is used to edit, create, delete, and print list of employees. Controls in the form are grouped into four blocks:

- A. *List of Employees*: Shows a list of current employees in database. A label shows the total number.
- B. *Entry Fields*: To describe an employee, five fields are required.
 - Employee ID—Automatically generated ID for each employee
 - Name—Name of employee
 - Designation—Designation of employee
 - User ID—Three-character User ID for each employee, which is used to log on to the software
 - Password—Password employee uses to log on to software
 All of these fields are compulsory.
- C. *Forms Tab*: List of form names. In each form, users are given permission to view or edit data.
- D. *Command Buttons*: Buttons available to manipulate employees.

6.1.2. View information about a specific employee

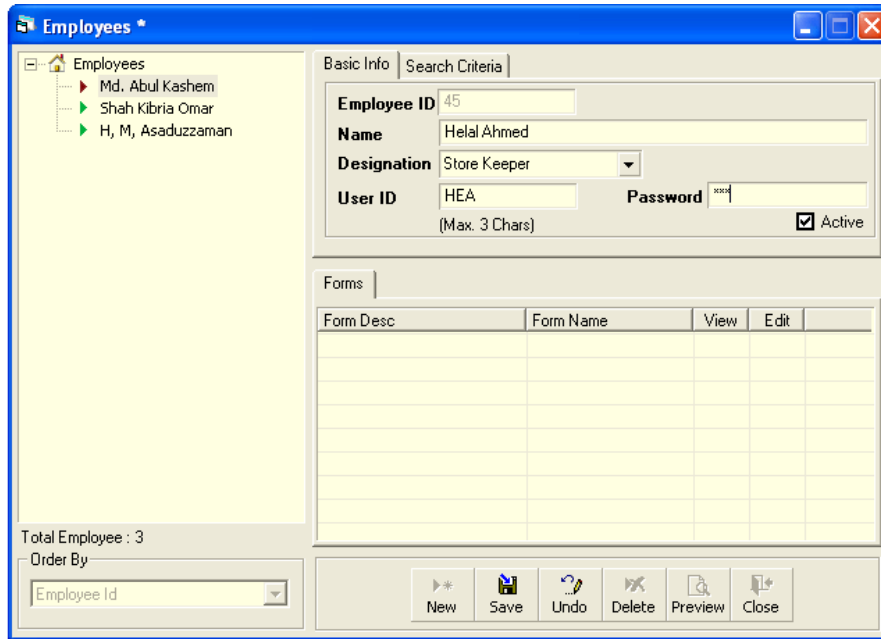
- Select the employee you want to view from the tree-like list in Block A. Using the Order By combo box, employees can be sorted in two ways: by Employee ID or Employee Name.
- After an employee name is selected, all of the fields are shown in Block B.


6.1.3. Enter a new employee

- Click on  in the command buttons block, and the following form appears:

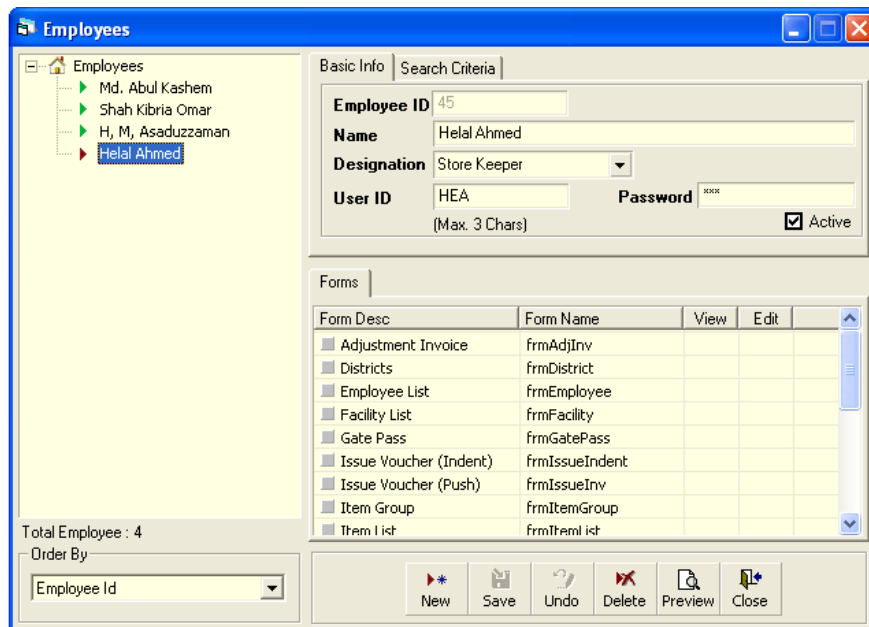
- The Employee ID is given automatically.
- Type Employee Name.
- Select Designation of the employee from list.

- Enter a three-digit User ID.
- Enter a Password for the employee, which is shown as *** for security reasons.



- Click on  , and your new employee name is visible in the employees list in

Block A.

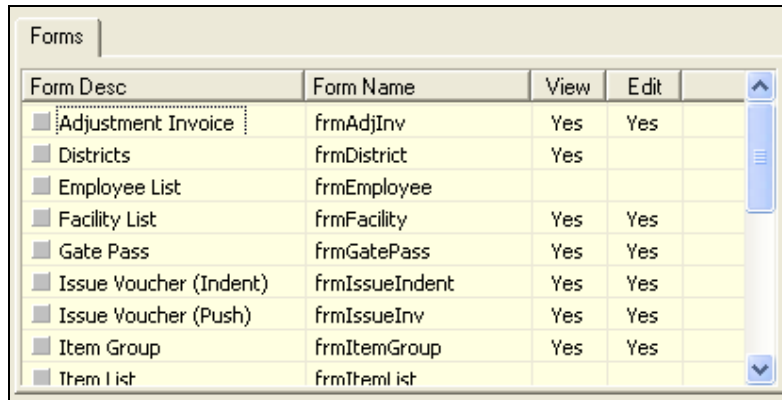


- If the new User ID conflicts with an existing ID, then an error dialog appears. Change the User ID and try saving again.

- If you want to cancel the new employee entry, press Esc during editing to undo.

6.1.4. Enter permissions in data entry forms

- Select the employee for whom you want to provide access to data entry forms.
- If you do not want an employee to access different forms, then do not give him or her permission to do so.




Form Desc	Form Name	View	Edit
Adjustment Invoice	frmAdjInv	Yes	Yes
Districts	frmDistrict	Yes	
Employee List	frmEmployee		
Facility List	frmFacility	Yes	Yes
Gate Pass	frmGatePass	Yes	Yes
Issue Voucher (Indent)	frmIssueIndent	Yes	Yes
Issue Voucher (Push)	frmIssueInv	Yes	Yes
Item Group	frmItemGroup	Yes	Yes
Item List	frmItemlist		

- If you want an employee to see data only but not change anything, then click on the View column. A Yes then appears beside the form name under the View column.
- If you want to give an employee access to data entry in the form, click on View and Edit columns beside the form name. A Yes then appears beside the form name under View and Edit column.


6.1.5. Edit an existing Employee

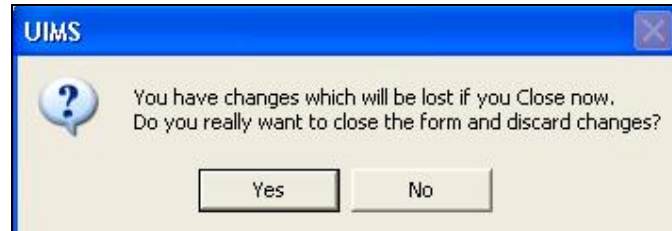
- Select the employee you want to edit from the list of employees.
- Change the Employee Name, Designation, User ID, and Password fields as needed.
- When done with editing, click on Save.
- If the new User ID conflicts with the ID of an existing employee, then an error dialog box appears. Change the User ID and try saving again.
- If you want to cancel the current editing, press Esc to undo changes.

6.1.6. Delete an existing Employee

- Select the employee you want to remove from list of employees.
- Click on  , and a confirmation dialog box appears.
- Click on Yes if you really want to delete the employee.
- You will not be able to delete employees who have been granted access to different forms. You must remove the permissions in different forms first, then remove the employee's name.

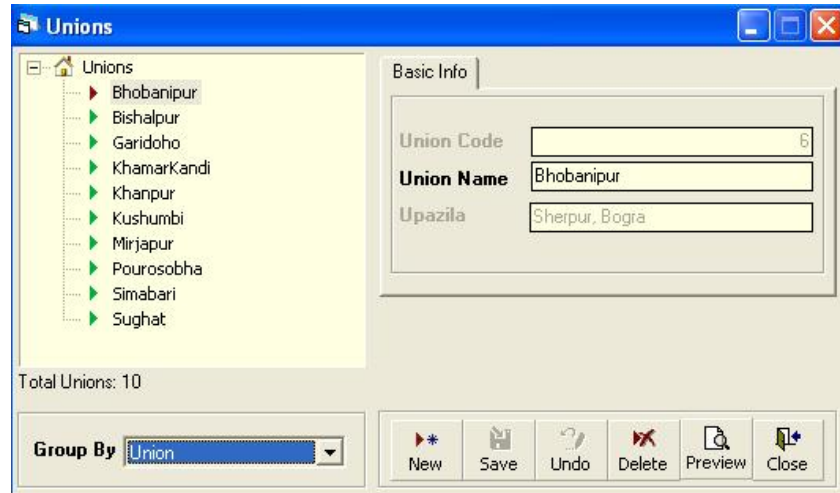
6.1.7. Close Employees form

- Click on  to exit from the Employees form.
- You can also exit by clicking on the X button at the top right of the form.
- If you have unsaved Employee data during exit, you are informed that your changes will be lost if you exit.



- Click on Yes if you do want to exit without saving. Click on No, if you don't want to close the form at this time.

6.2. Unions

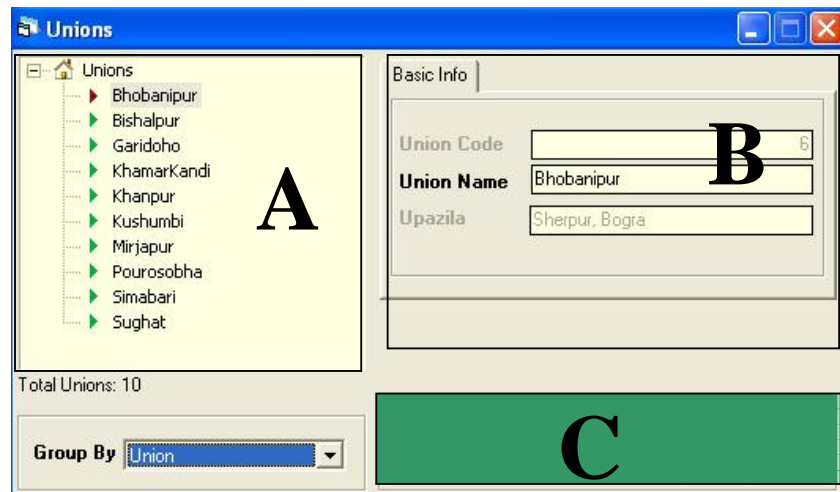


The Unions form contains the names of an upazila's unions.

6.2.1. View Unions

- Run UIMS.
- Select Administration > Unions from menu.
- Unions form is displayed.

6.2.2. General description of Unions form

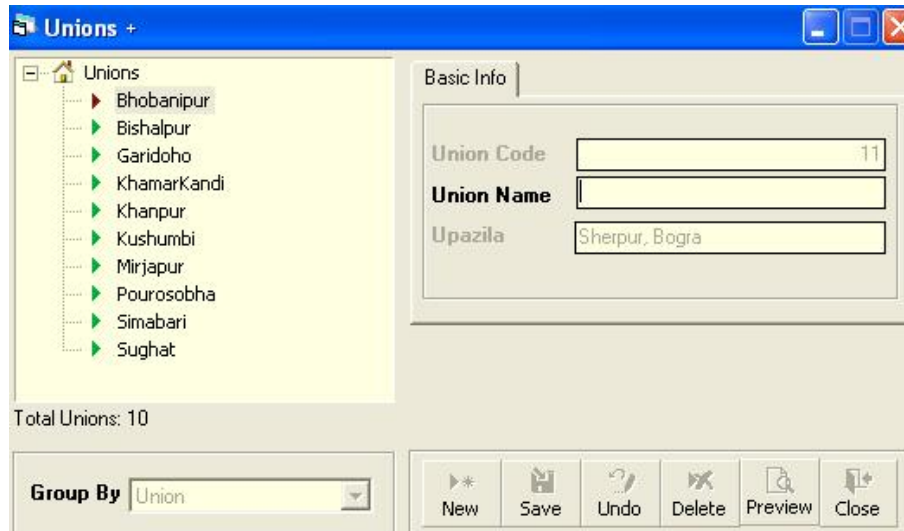


This form is used to add, edit, delete, and print a list of unions. Controls in the form are grouped into three blocks:

- A. *List of Unions*: Shows a list of an upazila's unions. A label shows the total number.
- B. *Entry Fields*: To enter a union, only Union Name is required.
 - Union Code—Code is generated automatically for each union
 - Union Name—Name of the union
 - Upazila—Auto generated
- C. *Command Buttons*: Buttons available to manipulate the unions.

6.2.3. Enter a new union

- Click on  in the command buttons block, and the following form appears:

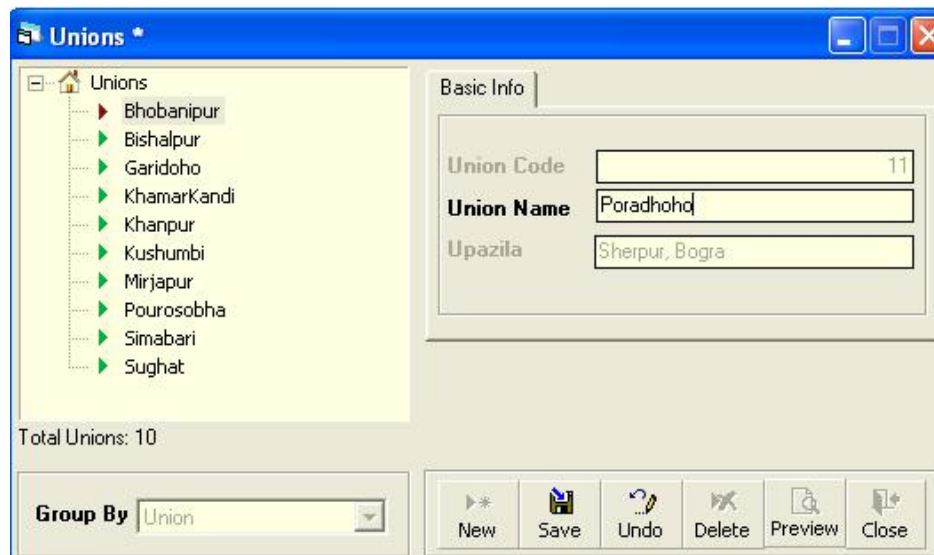


The screenshot shows a window titled "Unions +". On the left, there is a tree view of unions: Bhubanipur, Bishalpur, Garidoho, Khamarkandi, Khanpur, Kushumbi, Mirjapur, Pourosobha, Simabari, and Sughat. Below the tree, it says "Total Unions: 10". At the bottom left, there is a "Group By" dropdown menu set to "Union". At the bottom right, there is a toolbar with buttons: New, Save, Undo, Delete, Preview, and Close. The "New" button is highlighted.


The "Basic Info" section contains the following fields:

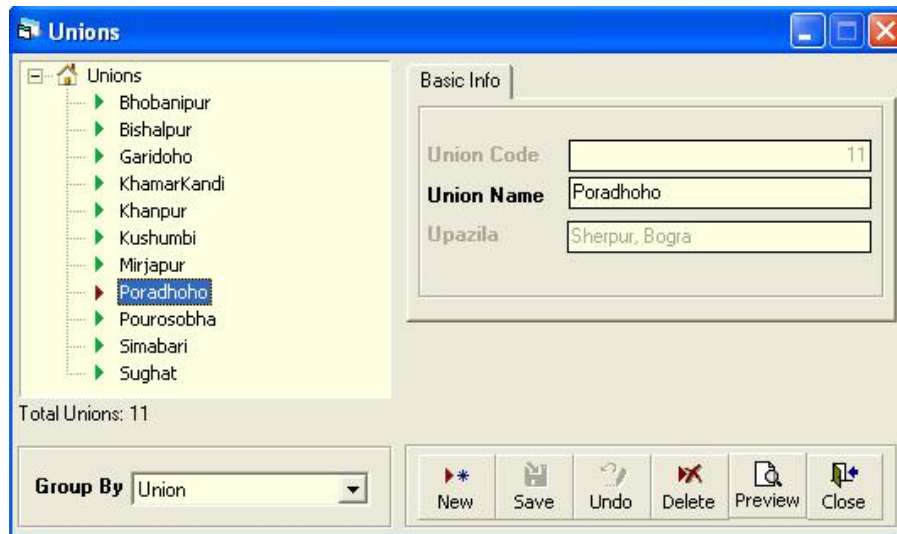
- Union Code: 11
- Union Name: (empty)
- Upazila: Sherpur, Bogra

- The Union Code is generated automatically.
- Type Union Name.
- Upazila name is also generated automatically.



The screenshot shows the same "Unions +" window. The "Union Name" field now contains the text "Poradhohd". The "New" button in the toolbar is no longer highlighted, and the "Save" button is highlighted.


- Click on , and your new union name is visible in the union list in Block A.

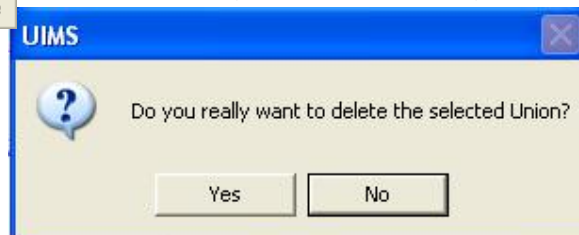


6.2.4. Edit an existing union

- Select the union you want to edit from the list of unions.
- Change the Union Name, then click on Save.
- Union name is updated.

6.2.5. Delete an existing Employee

- Select the Union you want to remove from list of unions.
- Click on  , and the following confirmation dialog box appears:



- Click on Yes if you really want to delete the union.
- You will not be able to delete unions that have used in different forms. You must remove the unions first, then remove the union.

6.3. SDP List

The SDP List contains the names of different workers to whom commodities are issued. Names from this list are picked during invoice preparation.

6.3.1. View SDPs


- Run UIMS.
- Select Administration > SDP List from menu.
- SDP List form is displayed.

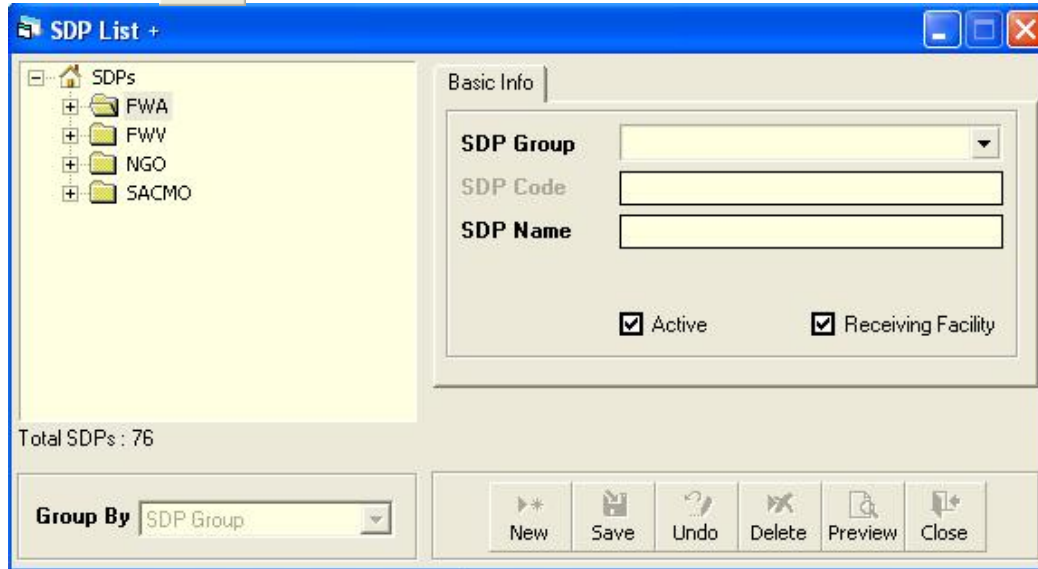
6.3.2. General description of Facility List form

This form is used to edit, create, delete, and print list of SDPs. Controls in the form are grouped into three blocks:

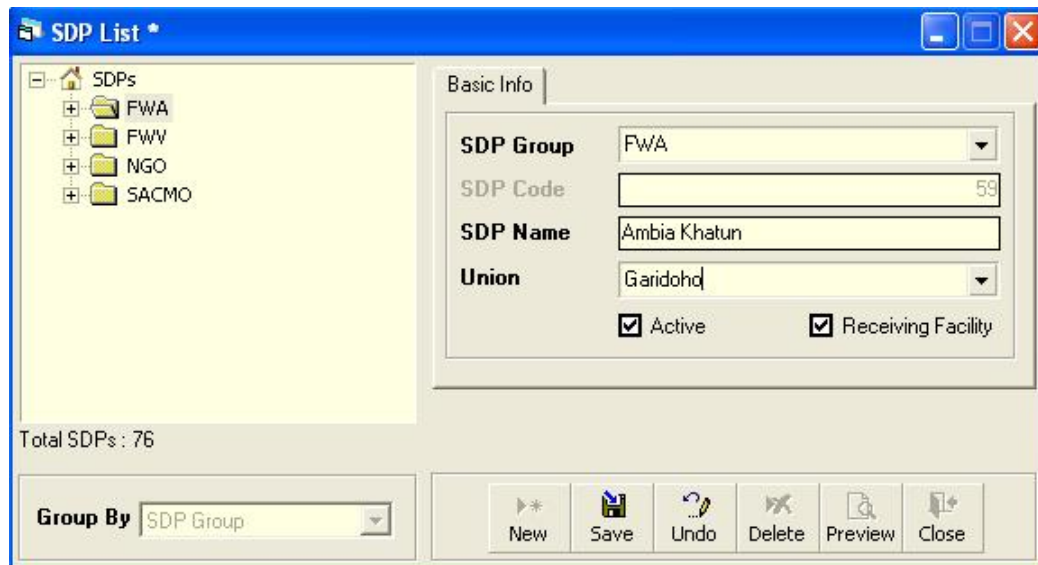
- A. *List of SDPs*: Shows a list of current SDPs in database. A label shows the total number.
- B. *Entry Fields*: To describe an SDP, three fields are required:
 - SDP Group—Facilities are classified into different groups
 - SDP Name—Name of the SDP
 - SDP Code—Unique sequence to represent the SDP under the group; it is generated automatically
- C. *Command Buttons*: Buttons available to manipulate the facilities.


6.3.3. Enter a new SDP

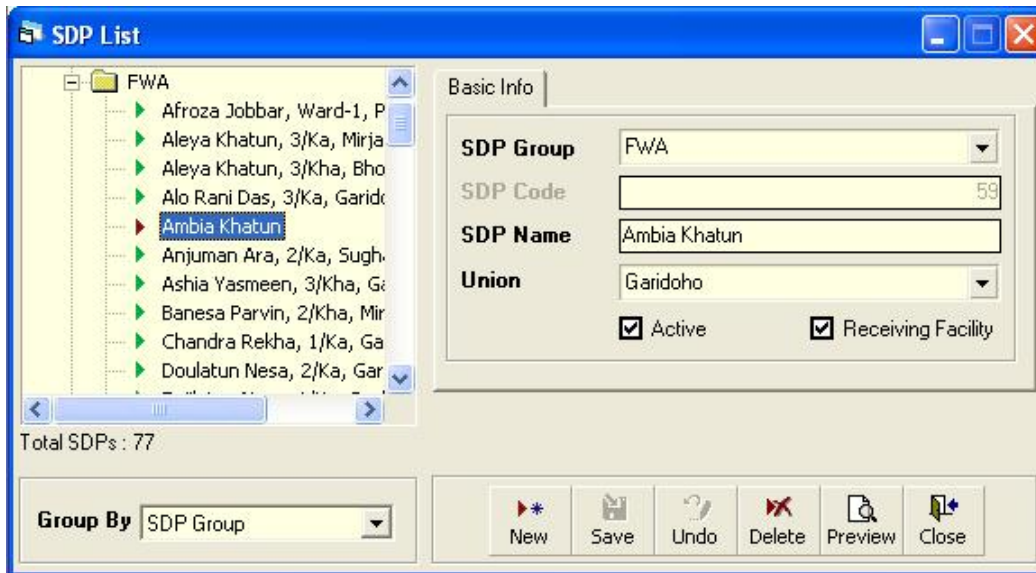
- Click on  in the command buttons block, and the following form appears:



- Select an SDP Group from the combo.
- SDP Code is appeared automatically.
- Enter Name of the SDP and Union (only for FWA and FWV group).



- Click on , and your new SDP name is visible in the SDP list in Block A.




- If the new SDP name conflicts with an existing SDP, then an error dialog box appears. Change the SDP name and try saving again.
- If you want to cancel the new district entry, press Esc during editing to undo.


6.3.4. Edit an existing SDP

- Select the SDP you want to edit from the list of SDPs.
- Change the SDP Group, SDP Name, and Union fields as needed.
- When done with editing, click on Save.
- If the new SDP name conflicts with an existing SDP, then an error dialog box appears. Change the SDP name and try saving again.
- If you want to cancel the current editing, press Esc to undo the changes.

6.3.5. Delete an existing Facility

- Select the SDP you want to remove from list of SDPs.
- Click on  , and a confirmation dialog box appears.
- Click on Yes if you really want to delete the SDP.
- **You will not be able to delete SDPs that have invoices linked to them.**

6.3.6. Print SDPs

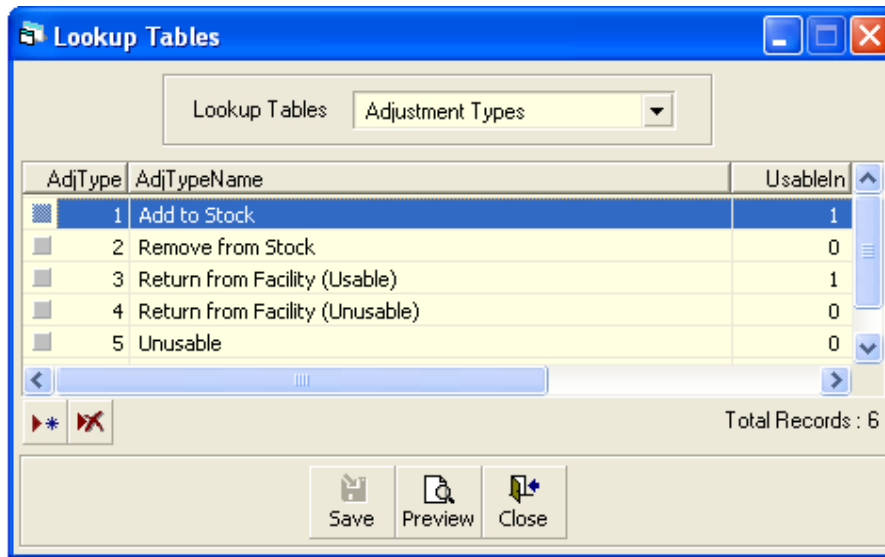
- Click on  to view a printable list of SDPs.

**Upazila Family Planning Office
Sherpur, Bogra
SDP List**

Type	SDP ID	SDP Name
<i>FWA</i>	F001	Afroza Jobbar, Ward-1, Pourosobha
	F033	Aleya Khatun, 3/Ka, Mirjapur
	F040	Aleya Khatun, 3/Kha, Bhobanipur
	F014	Alo Rani Das, 3/Ka, Garidoho
	F049	Anjuman Ara, 2/Ka, Sughat
	F015	Ashia Yasmeen, 3/Kha, Garidoho
	F031	Banesa Parvin, 2/Kha, Mirjapur
	F010	Chandra Rekha, 1/Ka, Garidoho
	F012	Doulatun Nesa, 2/Ka, Garidoho
	F048	Fajilatun Nesa, 1/Ka, Sughat (Acting)
	F047	Fajilatun Nesa, 1/Kha, Sughat
	F017	Fatema Khatun, 1/Kha, Khamarkandi

- Click on the printer icon; the print dialog box appears.
- You can provide Print Range, Copies and click on OK. If you want to print only one copy of the whole report, then just click on OK.
- After printing, click on the leftmost X button to close the preview window.

6.4. Lookup Tables

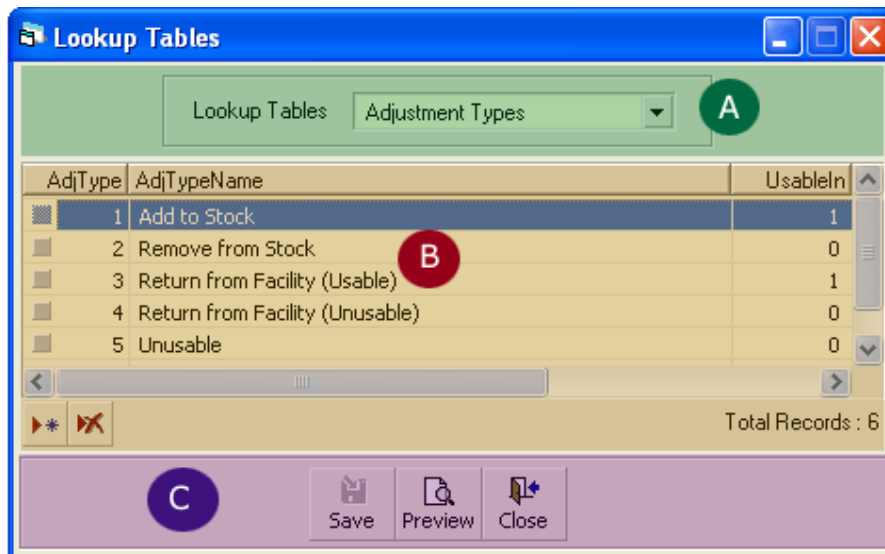


Some data tables that rarely need to be changed are listed on Lookup Tables form. Data entry of information, such as Adjustment Types, Employee Designation, Divisions of Bangladesh, Facility Group, List of Forms, List of Reports and Units of Measurement, are listed here.

6.4.1. View Lookup Tables

- Run UIMS.
- Select Administration > Lookup tables from menu.
- Lookup tables form is displayed.

6.4.2. General description of Lookup Tables form




This form is used to edit, create, and delete some basic data entry tables. Controls in the form are grouped into three blocks:

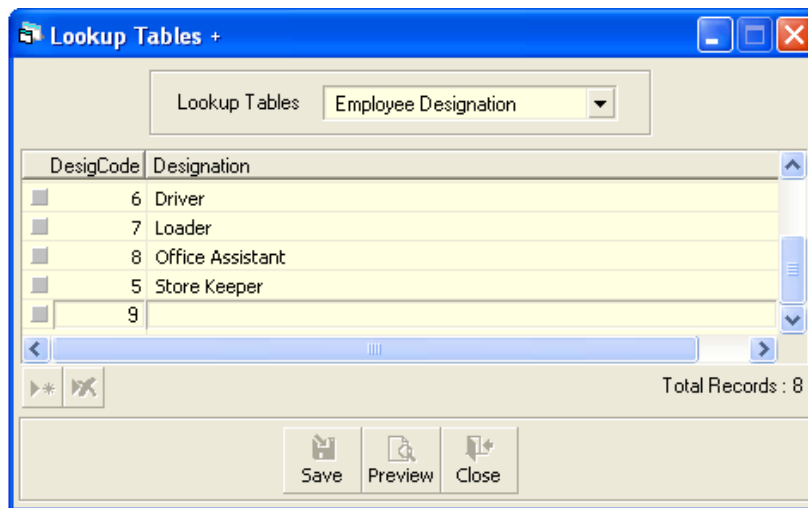
- A. *List of Lookup Tables*: Shows a list of current tables managed by this form.
- B. *Entry Fields*: List of records in the current lookup table.
- C. *Command Buttons*: Buttons available to manipulate the records.

6.4.3. View information about a specific lookup table

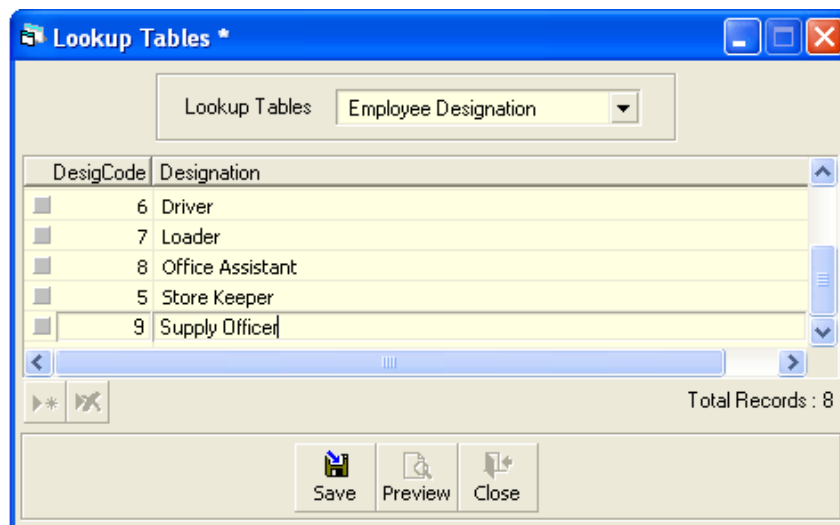
Select table you want to view from list in Block A; records are shown in Block B.


6.4.4. Enter a new record in any lookup table

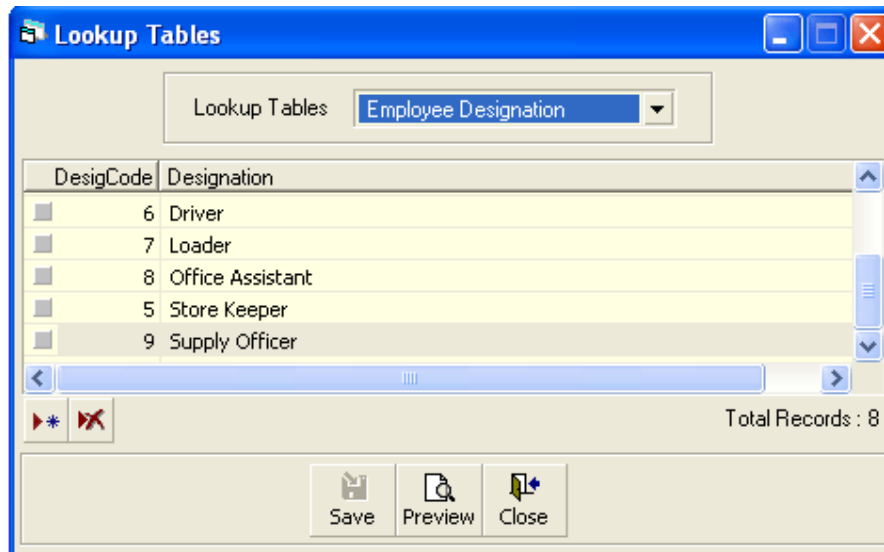
- After the table name is selected in Block A, click on  in the command buttons block, and the following form appears:



- Enter data entry fields as necessary.



- Click on  , and your new record appears in Block B.




- If you want to cancel the new record entry, press Esc during editing to undo.


6.4.5. Edit an existing record

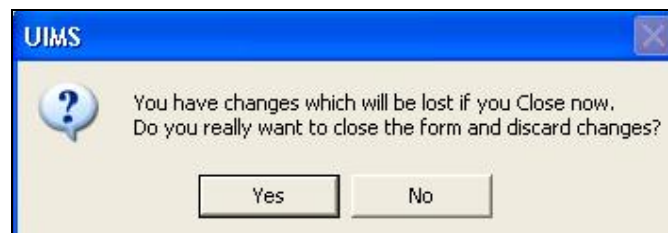
- Select table name in Block A
- Change fields of any record if necessary.
- When done with editing, click on Save.
- If you want to cancel the current editing, press Esc to undo the changes.

6.4.6. Delete an existing record

- Select table name in Block A
- Click on  , and a confirmation dialog box appears.
- Click on Yes if you really want to delete the record.

6.4.7. Close Lookup Tables form

- Click on  to exit Employees form.
- You can also exit by clicking on the X button at the top right of the form.
- If you have unsaved data during exit, you are informed that your changes will be lost if you exit.



- Click on Yes if you do want to exit without saving. Click on No if you don't want to close the form at this time.

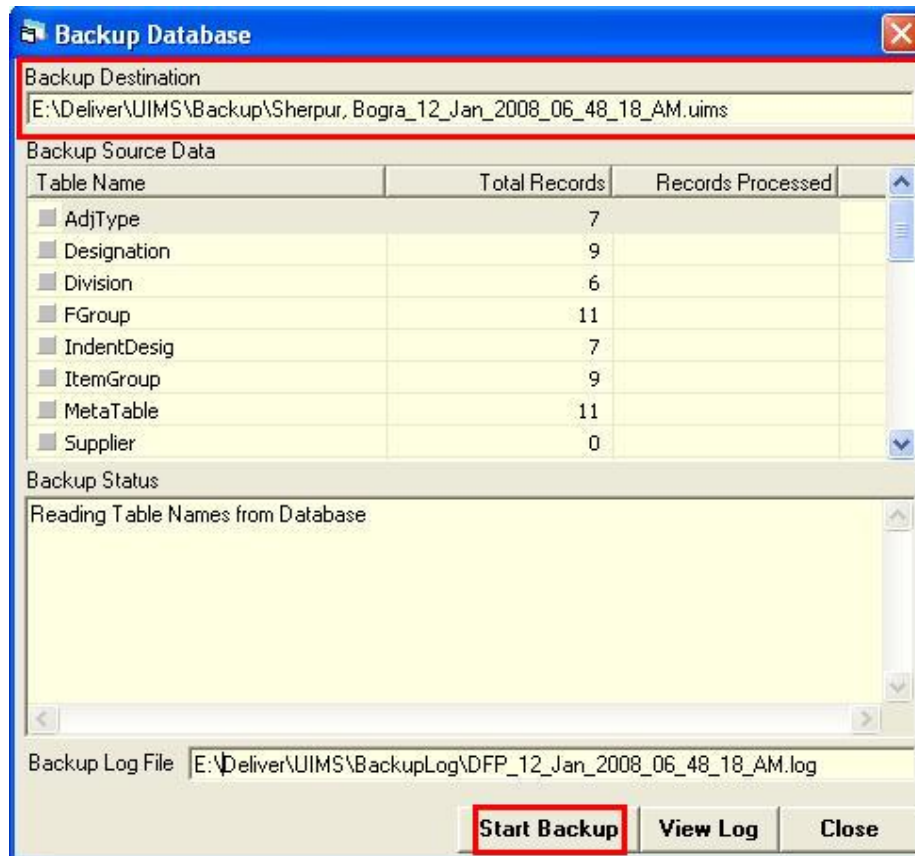
6.5. Backup Database

Table Name	Total Records	Records Processed
AdjType	7	
Designation	9	
Division	6	
FGroup	11	
IndentDesig	7	
ItemGroup	9	
MetaTable	11	
Supplier	0	

From this form, you can back up the entire database. The backup is generated as a computer-generated file in a pre-defined directory. The file can be copied or moved to another folder in the same computer or to another computer or emailed to CWH. If the computer crashes or data become corrupted, this backup can be used to retrieve all data.

6.5.1. How to back up database

- Run UIMS.
- Select Administration > Backup Database from menu.
- Backup Database form is displayed.
- Click on Start Backup at the bottom of the form.



- The data are backed up in a file whose name is specified in Backup Destination text box. After backup is complete, you will see a message, Backup Completed without Error. Click on OK in this dialog box.
- To make a copy of the file or email it, you have to find the file by its location, which is normally the Backup folder under the software installation folder.
- To make a copy of the file to a pen drive/flash drive, locate the file by its location, and copy it to a pen drive/flash drive.
- After backup is complete, you can close the form using Close button.

Technical Help

We hope users of the system will be able to work with the system successfully by following this manual and that the system will be useful for the users. However, if users any guidance or technical support, they should contact to their respective logistics support officer (LSO) or one of the following for support and assistance.

The Directorate General of Family Planning
Ministry of Health and Family Welfare
6, Karwan Bazar, Dhaka, Bangladesh
Tel: 880.2.9146262
Email: fpmis@yahoo.com

Contact Person: Abul Kalam Azad
Deputy Program Manager

USAID | DELIVER PROJECT
John Snow, Inc.
House # NE(O) 6, Road # 92
Gulshan-2, Dhaka 1212, Bangladesh
Tel: 880.2.886.0812-16
Email: zakir@deilver-bd.com

Contact Person: Mohammad Zakir Hossain Sarker
MIS Specialist

Conclusion

This manual is a guide for end users of the system. Such users do not need technical knowledge to use and operate the system. Keeping this in mind, we have written this manual in such a way so that end users can easily follow the guidelines included. We strongly believe that successful development of software depends on user satisfaction. We hope users will be able to use the software to their ultimate satisfaction with the help of this user manual.