PipeLine

USAID

JSI

FPLM

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

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

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SECTION 3 PROGRAM DATA

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Overview

Introduction

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

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

These are the "six rights" of logistics management.

What PipeLine Can Do for You

PipeLine helps you most directly in achieving the *right* quantities at the *right* time.

For each product, PipeLine monitors—

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

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

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

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

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

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

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

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

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

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

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

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

Why Use PipeLine?

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

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

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

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

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

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

You may need to negotiate with many different suppliers and donors to obtain the quantities you require. Such negotiations are best accomplished when specific data on product requirements are available: You must know when you will stockout of each product, how much must be procured to meet future needs, and when you should receive it. You must also know what quantities would exceed your storage capacity or risk wastage due to expiry, so you do not over order.

PipeLine can help you answer these questions.

Who Should Use PipeLine?

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

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

While your managers and decision-makers will be the primary users of PipeLine, the system can also provide information to others:

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

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

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

PipeLine Software Functions

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

Pipeline Monitoring

Pipeline monitoring functions include—

- Monitoring stock balances, in terms of quantities and months of stock on hand in the entire program (aggregate of stock at all levels).

- Comparison of stock balances to maximum and minimum stock policies.

- Automated identification of pipeline problems (quantities needed, stockouts, balances below minimum or above maximum).

- Couple Years of Protection (CYP) conversion graphs.

Procurement Planning

Procurement planning functions include—

- Calculation of shortfalls/surpluses and quantities needed at any time to maintain the program's desired stock levels.

- Automated calculation and tracking of pending pipeline actions, based on lead times (shipments to plan, order, ship, and receive).

- Application of USAID's Contraceptive Procurement Tables (CPT) format for computation of calendar year quantities required and generation of data for USAID's planning requirements.

- Calculation of estimated costs of shipments and freight.

- Comparison of alternative procurement scenarios and analysis.

How to Obtain PipeLine

PipeLine was developed by the United States Agency for International Development (USAID) through the Family Planning Logistics Management Project (FPLM), Contract Number CCP-3038-C-00-5028-00. The software, its documentation, and assistance in installation and use are available from the following sources:

PipeLine Information Systems Manager
Family Planning Logistics Management Project
John Snow, Inc.
1616 North Fort Myer Drive, 11th Floor
Arlington, VA 22209 USA
   Phone: (703) 528-7474
   Fax: (703) 528-7480

Inquiries may also be directed to:

Project Officer
USAID/G/POP/CLM
1300 Pennsylvania Avenue, NW
Washington, D.C. 20523
   Phone: (202) 712-4691
   Fax: (202) 716-3404

GETTING STARTED

Introduction

This section explains how to install, run, restore, backup, and upgrade PipeLine. For questions about running PipeLine, contact the PipeLine Program Associate at the following address:

> Family Planning Logistics Management Project
> John Snow, Inc.
> 1616 North Fort Myer Drive, 11th Floor
> Arlington, VA 22209 USA
> > Phone: (703) 528-7474
> > Fax: (703) 528-7480

Recommended System Requirements

The following resources are recommended for use with PipeLine:

CPU	Pentium II or higher
Operating System	Windows 95/98, Windows NT
Memory	32 MB
Hard Drive Space	50 MB
Video Adapter	SVGA with 800x600 resolution
Miscellaneous	Microsoft Office

PipeLine was developed in Microsoft Access. However, you do not need to know Microsoft Access to use PipeLine. Minimal computer skills and an understanding of Windows 95/98/NT are all that is needed.

How to Install PipeLine

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

Installing PipeLine from a CD

1. Start Microsoft Windows.

2. Insert the PipeLine CD.

3. Click on "Start" on the Windows Taskbar.

4. Click on "Run" from the pop-up menu.

5. In the Command Line box, type *x:setup* ("x" is the letter of your CD-ROM drive).

6. Click on the OK button.

7. Follow the onscreen instructions.

The setup program leads you through the installation process.

Installing PipeLine from the Internet

PipeLine can be downloaded from this Web address:
http://fplm.jsi.com/software/software.html

1. Start Microsoft Windows.

2. Access the Internet and enter the FPLM Software Download Web address.

3. Click on the download link.

4. Follow the onscreen instructions.

> ▤ You must have a valid e-mail address to receive the password
> necessary to install the software.
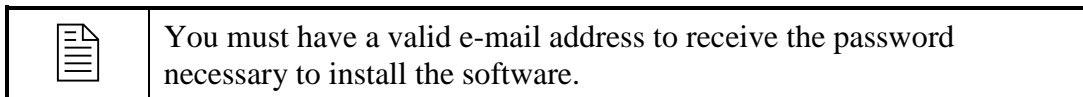
After you download PipeLine—

5. Click on the downloaded executable file.

6. Follow the onscreen instructions.

The setup program leads you through the installation process.

Installing PipeLine from Diskettes

1. Start Microsoft Windows.

2. Insert PipeLine installation diskette one.

3. Click on "Start" on the Windows Taskbar.

4. Click on "Run" from the pop-up menu.

5. In the Command Line box, type *a:setup.*

6. Click on the OK button.

7. Follow the onscreen instructions.

The Setup program leads you through the installation process.

How to Run PipeLine

From the Windows Desktop—

1. Locate and double-click on the PipeLine icon.

This starts PipeLine and displays the Main Menu.

From the Windows Taskbar—

1. Click on Start.

2. Click on Programs.

3. Locate and click on the PipeLine folder.

4. Click on PipeLine.

This starts PipeLine and displays the Main Menu.

	PipeLine supports English, Spanish, and French. You can change the language of the current session by selecting a language from the pull-down menu on the any menu. This temporary change remains in effect for the duration of the session.
	For example: If you select Spanish as the session language, PipeLine's button labels, menu titles, etc., are displayed in Spanish.

Upgrading From an Earlier Version

1. Install the upgrade version of PipeLine explained in the topic *How to Install PipeLine* on page 2-1.

When you use your upgraded PipeLine software for the first time, you will need to upgrade your data files. Upgrading your data files is as simple as restoring a program. See *Restoring a Program* on page 3-7 of Section 3 for information on restoring a program.

> **WARNING!!** After you convert data files from an older version of PipeLine to a newer version, you may not be able to use the converted files with the old system.
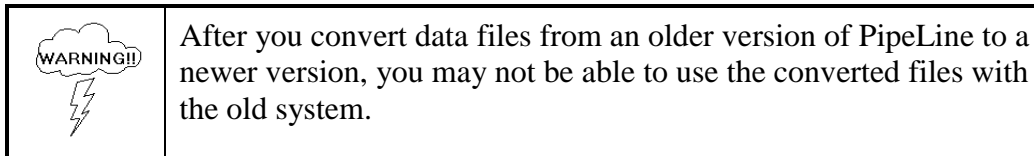
On-Line Help

PipeLine's On-Line Help is a supplement to the *PipeLine User's Manual*. On-Line Help provides information on basic PipeLine functions.

1. Press the <F1> key, at any time, to access On-Line Help.

PipeLine also provides field- and button-related context sensitive help. Place the mouse pointer on a field or button to display basic information on the selected button or field in the status bar at the bottom of the screen. Figure 2-1 shows the context sensitive help message for the Add button on the Consumption Data form.

Add a consumption record for the current product

Figure 2-1 — Context sensitive help message

Navigation Techniques and Conventions

PipeLine screens move from general to detailed. Pressing the Back button returns you to the previous screen.

Buttons

The following buttons are used in PipeLine:

Button	Action
Add	Adds a new record to the database.
Back	Returns to the previous screen.
Cancel	Aborts add/edit operation and returns to the previous screen.
Delete	Deletes a record from the database.
Edit	Updates an existing database record.
EXIT	Exits from PipeLine.
Print	Prints a PipeLine report or graph.
Save	Saves a new or updated record.

Pull-Down Menus

Pull-down menus, similar to Figure 2-2, let you choose from a list.

To use a pull-down menu—

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

Figure 2-2 — Sample pull-down menu

2. Double-click on the item you want to select.

The selected item is displayed in the associated field. Figure 2-2 shows that "English" was selected from the Language pull-down menu on PipeLine's Main Menu.

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

Navigation Bar

The Navigation Bar lets you move from record to record in the associated table. Figure 2-3 shows that the current record is number 1 out of a total of 5 records.
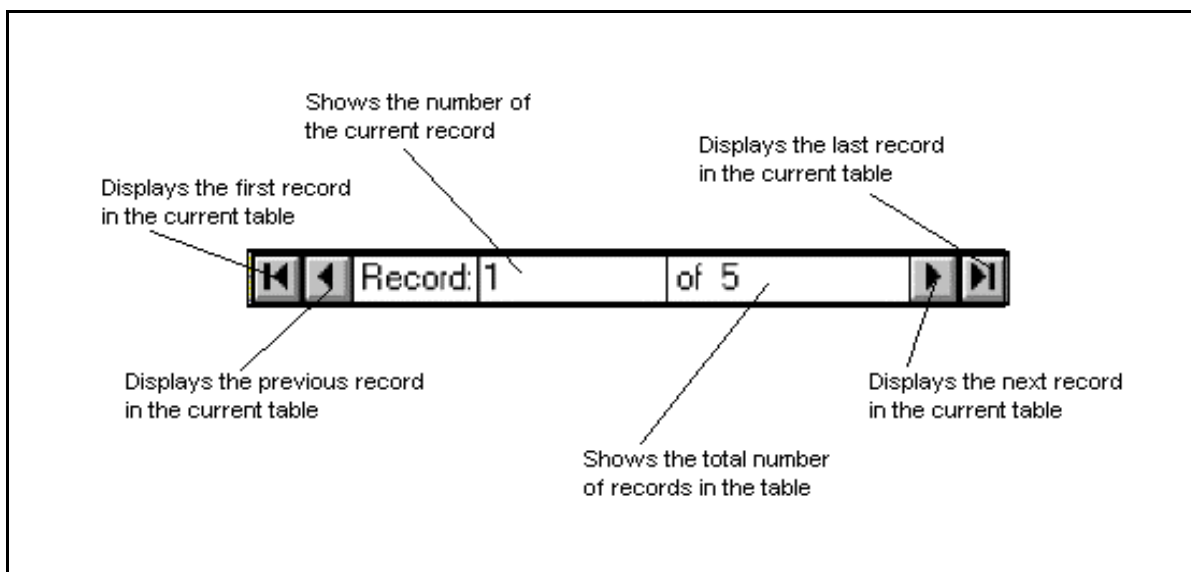
Figure 2-3 — Sample Navigation Bar

Clicking on an arrow button at either end of the navigation bar displays a record as indicated by the labels in Figure 2-3.

Scroll Bars

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

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

    Left   Up
    Right   Down

Figure 2-4 shows an example of vertical and horizontal scroll bars.
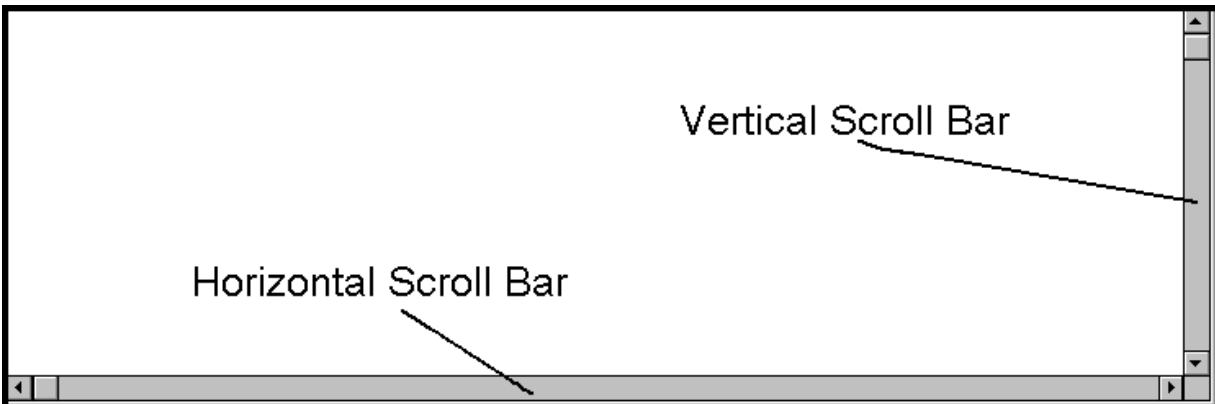
Figure 2-4 — Sample vertical and horizontal scroll bars

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

Keys for Editing Records

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

Keys For Editing PipeLine Records	
F1	Displays On-Line Help.
F2	Switches between cursor and selection.
Backspace	Deletes selection or character to the left of the cursor.
Delete	Deletes selection or character to the right of the cursor.
Escape	*First press*: Undoes changes to a field. *Second press*: Undoes all changes to the record.
Insert	Toggles between insert and overwrite modes.
Tab	Moves the cursor from one field to the next. Also moves the cursor from one button to another without activating buttons.

PROGRAM DATA

Accessing the Program Data Screen

After you install PipeLine and click on the PipeLine icon, the Main Menu appears.

📄	PipeLine supports English, Spanish, and French. To change the language of the current session, select a language from the pull-down menu on the Main Menu. This temporary change remains in effect for the duration of the session. For example: If you select Spanish, PipeLine's button labels, menu titles, etc., are displayed in Spanish.

PipeLine has a sample program database called "Ministry of Health, FPU," which shows how PipeLine displays and organizes data. The sample database can be viewed as follows:

From the Main Menu—

1. Click on the Program Data button to display the Program Data form (Figure 3-1).
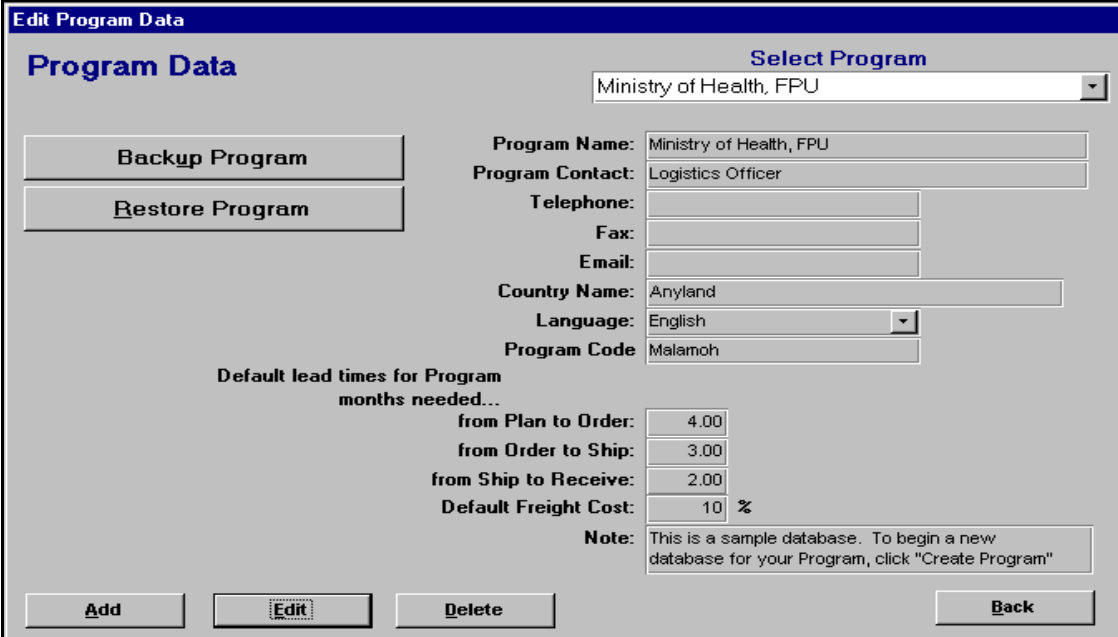
Figure 3-1 — Program Data form

Adding a Program

You can use the Add button to add a new program.

From the Main Menu—

1. Click on the Program Data button to display a blank Program Data form.

2. Click on the Add button to display a blank Program Data form (Figure 3-2).

Figure 3-2 — Blank Program Data form

3. Type the program name and press <Enter>.

4. Type the name of the program's contact person and press <Enter>.

5. Type the contact person's telephone number and press <Enter>.

6. Type the contact person's fax number and press <Enter>. Skip this field if it does not apply.

7. Type the contact person's email address and press <Enter>. Skip this field if it does not apply.

8. Click on the country name field and type the program's country name.

The Language field lets you select the program's default language. The default for this field is "English." You can select a different language as follows:

9. Click on the arrow next to the language field, select a language from the pull-down menu, and click the left mouse button.

> ▤ | The selected language is used when the associated program is active. You can change the language from the Main Menu. However, when you exit and restart PipeLine, the system reverts to the program's default language.
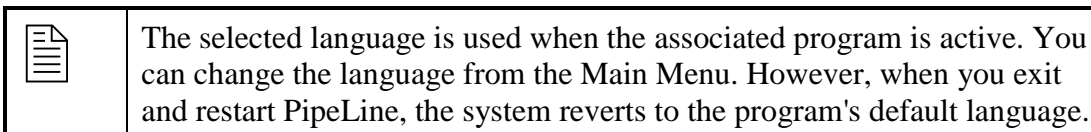
The Program Code field holds the program's identification code (ID). This eight-character code must be unique.

10. Click on the Program Code field and type the program's code.

Default Lead Times

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

The Plan to Order field shows the estimated lead time (in months) expected from the time a shipment is planned to when it is ordered. The default for this field is 6.00 (six-month lead time). You can change the default lead time as follows:

1. Click on the Plan to Order field, type the lead time, and press <Enter>.

The Order to Ship shows the estimated lead time (in months) expected from the time a shipment is ordered to when it is shipped. The default for this field is 4.00 (four-month lead time). You can change the default lead time as follows:

2. Type the Order to Ship lead time and press <Enter>.

The Ship to Receive field shows the estimated lead time (in months) from the time a shipment is shipped to when it is received by the program. The default for this field is 2.00 (two-month lead time). You can change the default lead-time as follows:

3. Type the Ship to Receive lead time and press <Enter>.

Default Freight Cost

The Default Freight Cost field shows the approximate freight cost for a shipment as a percentage of the shipment's product value. Include all costs associated with product delivery (i.e., taxes, clearance fees, etc.). PipeLine uses the default freight cost when calculating freight cost if you do not fill in freight cost estimates for individual suppliers.

1. Type the shipment's Default Freight Cost and press <Enter>.

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

1. Type any relevant notes. Skip this field if it does not apply.

Saving the Data

After you complete the Program Data form—

1. Click on the Save button.

PipeLine displays the Save Database File window, Figure 3-3. The file name (in this case, pmp_Data.mdb) was created by PipeLine.

2. Click on the Save button to accept the default file name.
                    OR
3. Type a new file name and click on the Save button.

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

4. Click on the Back button to exit the Program Data form.
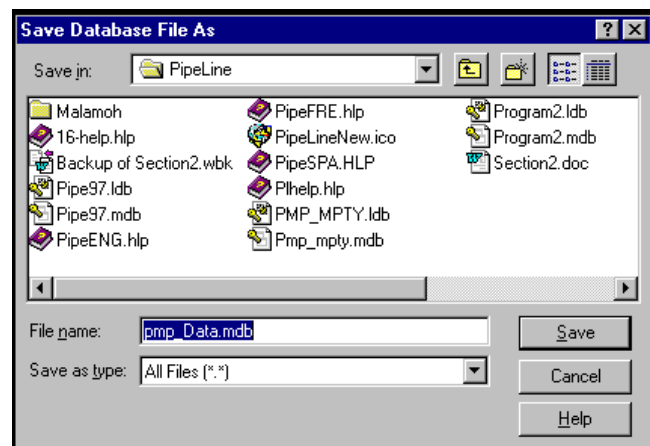
Figure 3-3 — Save Database File window

Selecting a Program

The Program Data form lets you deselect the current database and activate another. When the Program Data form is displayed, it displays information about the current (active) program. You can activate another program (if additional programs exist) by selecting an entry from the Select Program pull-down menu.

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

From the Main Menu—

1. Click on the Program Data button to display the Program Data form for the current program.

2. Click on the arrow next to the Select Program field, select a program from the pull-down menu, and click the left mouse button.

PipeLine displays the selected program's information.

3. Repeat as needed.

4. Click on the Back button to return to the Main Menu.

Editing a Program

You can use the Edit button to change contact information, lead times, or freight costs for a selected program.

From the Main Menu—

1. Click on the Program Data button to display the Program Data form for the current program.

If the displayed program is not the one you need—

2. Click on the arrow next to the Select Program field, select a program from the pull-down menu, and click the left mouse button.

When the program you want to edit is displayed—

3. Click on the Edit button.

4. Make the necessary corrections.

5. Click on the Save button when finished.

6. Click on the Back button to exit the Program Data form.

Deleting a Program

Use the Delete button to remove programs from the Program pull-down menu. The database files are not deleted from the hard drive. Deleted programs can be returned to the Program pull-down menu with the Restore Program option. See Restoring a Program on page 3-7.

From the Main Menu—

1. Click on the Program Data button to display the Program Data form for the current program.

If the displayed program is not the one you need—

2. Click on the arrow next to the Select Program field, select a program from the pull-down menu, and click the left mouse button.

3. Click on the Delete button when the Program Data form is displayed.

Backing Up a Program

The Backup Program button copies the contents of the current program to a floppy diskette or your hard disk. You can use this option to transfer program data from one computer to another—or to archive program data.

From the Main Menu—

1. Click on the Program Data button to display the Program Data form for the current program.

If the displayed program is not the one you need—

2. Click on the arrow next to the Select Program field, select a program from the pull-down menu, and click the left mouse button.

3. Click on the Backup Program button when the data you need is displayed.

PipeLine displays the Backup Files window as shown in Figure 3-4.

4. Select the location you want the program database backed up to, and click on the Open button.

The backup is complete when the Backup Files window is no longer displayed.
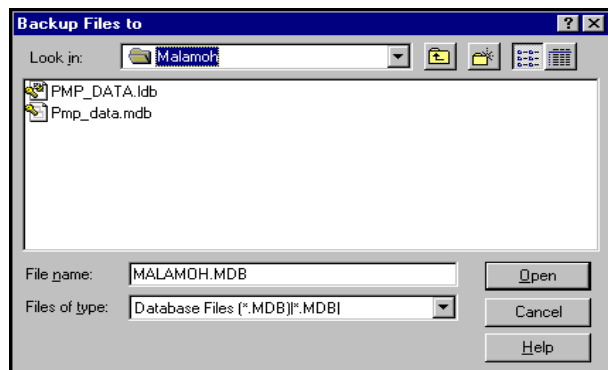
Figure 3-4 — Backup Files window

5. Click on the Back button to exit the Program Data form.

Restoring a Program

You can use the Restore button to return and reactivate a program that has been backed up, deleted, or transferred to another computer.

From the Main Menu—

1. Click on the Program Data button to display the Program Data form.

2. Click on the Restore Program button when the Program Data screen is displayed.

PipeLine displays the Restore Database selection window. Figure 3-5 shows the Restore Database selection window with a file backed up to the A:\ drive.

3. Select the database you want to restore, and click on the Open button.

PipeLine redisplays the Restore Database selection window (Figure 3-5) so you can select the new location of the file you are restoring.
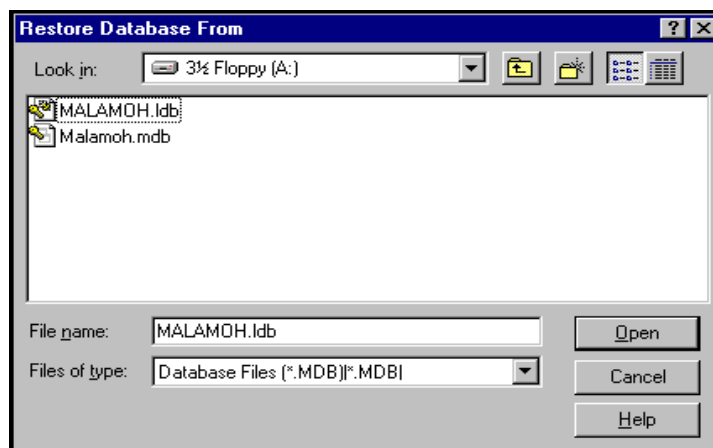
Figure 3-5 — Restore Database selection window

4. Select the location where you want the program stored, and click on the Open button.

When the restore is complete—

5. Click on the Back button to exit the Program Data form.

BACKGROUND DATA

Introduction

The Background Data menu provides options that enable you to modify pull-down menus, program and supplier lead times, product costs, and to establish product minimum and maximum stock levels.

This menu is used to set up a new program database so you can modify the products, methods, suppliers, and data sources appropriate for your program. A new database will not have primary records until you enter them. However, PipeLine has default records you can modify. If the PipeLine defaults are not right for your program, you can delete the defaults and add new records. This section explains how to work with background data files.

Products

The Products menu is used to modify product information, change minimum and maximum stock levels, change a default product supplier, or change a product's category or method.

Viewing Product Data

You can view product data.

From the Main Menu—

1. Click on the Background Data button to display the Background Data menu.

2. Click on the Products button to display the Products Selection form (Figure 4-1).

3. Double-click on the product you want to view.

Figure 4-1 – Products Selection screen

The sample product data is displayed (Figure 4-2).

Figure 4-2 — Sample product data

4. Click on the Note tab to view associated notes (if any).

5. Click on the Cancel button to return to the Products Selection form.

6. Click on the Back button to return to the Background Data menu.

Updating Product Data

You can update product data.

From the Main Menu—

1. Click on the Background Data button to display the Background Data menu.

2. Click on the Products button to display the Products Selection form.

3. Click on the product you want to update.

4. Click on the Edit button.

5. Click on the field you want to update and enter the new data.

6. If the product is no longer active, click on the Active field.

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

7. Click on the Note tab and enter the reason for the update.

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

If necessary—

9. Click on the Case Sizes button to add or modify case sizes. See Entering Case Size Data on page 4-6.

10. Click on the Costs button to add or modify product values. See Entering Product Cost Data on page 4-9.

When you finish updating—

11. Click on the Back button to return to the Background Data menu.

Adding a New Product

You can add a product.

From the Main Menu—

1. Click on the Background Data button to display the Background Data menu.

2. Click on the Products button to display the Products Selection form.

3. Click on the Add button to display a blank Products form (Figure 4-3).

Figure 4-3 — Blank Products form

4. Type the product name and press <Enter>.

The Code field holds the product's code. When adding new products, use a code with less than seven digits that will uniquely identify the product.

5. Type the product code and press <Enter>.

Method refers to a contraceptive method (i.e., condoms, implants, injectables, etc.). It can also refer to a category of similar products (e.g., sexually transmitted infection (STI) treatment drugs).

6. Click on the arrow next to the Method field, select the method from the pull down-menu, and click the left mouse button.

> If the method you need is not on the pull-down menu, you must add it. See Adding a New Method on page 4-14 for more information.

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

7. Click on the arrow next to the Default Supplier field, select the product's default supplier from the pull-down menu, and click the left mouse button.

> If supplier you need is not on the pull-down menu, you must add it. See Adding a New Supplier on page 4-17 for more information.

The Active field lets you show that the product is active (and appears in the Product pull-down menu). New products are active by default.

Months of Stock Tab

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

Program (all levels)

This area lets you set stock levels for the entire program.

The Min field shows the minimum amount of stock (in months). The default for this field is 6 (six months of stock). You can change the default.

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

The Max field shows the maximum amount of stock (in months). The default for this field is 12 (twelve months of stock). You can change the default.

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

The Desired field shows the desired amount of stock (in months). The default for this field is 12 (twelve months of stock). You can change the default.

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

Central Level

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

The Min field shows the minimum amount of stock (in months). The default for this field is 6 (six months of stock). You can change the default.

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

The Max field shows the maximum amount of stock (in months). The default for this field is 12 (twelve months of stock). You can change the default as follows:

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

When you finish—

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

After you complete the Products form—

2. Click on the Case Sizes button to add case size data. See Entering Case Size Data on page 4-6 for more information.

3. Click on the Costs button to add the product's cost. See Entering Product Cost Data on page 4-9 for more information.

When you return to the Products Selection form—

4. Click on the Back button to return to the Background Data Menu.

Deleting a Product

You can delete a product.

From the Main Menu—

1. Click on the Background Data button to display the Background Data menu.

2. Click on the Products button to display the Products Selection form.

3. Select the product you want to delete.

4. Click on the Delete button.

If the product can be deleted, a message similar to the one in Figure 4-4 is displayed.
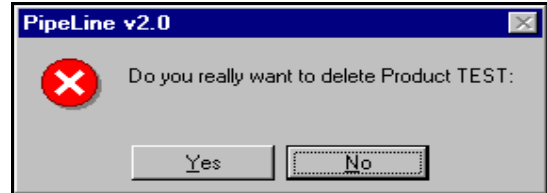
Figure 4-4 — Delete message 1

5. Click on "Yes" to confirm the delete.

6. Click on the Back button to return to the Background Data menu.

If you cannot delete the product (because it is associated with other records), a message similar to the one in Figure 4-5 is displayed.

7. Click on "OK" to close the message window.
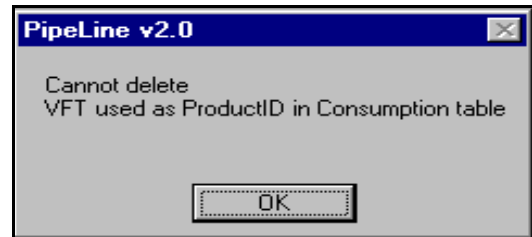
Figure 4-5 — Delete message 2

8. Click on the Back button to return to the Background Data menu.

Case Sizes

Case sizes are accessed through the Products Selection form. They are used to set a product's default case size. Shipment quantities are rounded to the nearest case units.

Entering Case Size Data

You can enter case size data.

From the Main Menu—

1. Click on the Background Data button to display the Background Data menu.

2. Click on the Products button to display the Products Selection form.

3. Click on the Case Sizes button.

The Product Case Sizes form is displayed (Figure 4-6). The product shown on the form is usually the last product accessed through the Product Selection screen.

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

4. Click on the arrow next to the Select Supplier field, select the supplier from the pull-down menu, and click the left mouse button.

5. Click on the arrow next to the Select Product field, select the product from the pull-down menu, and click the left mouse button.

Figure 4-6 – Product Case Sizes form

6. Click on the Add button

The Product Case Sizes information form is displayed (Figure 4-7).

The Supplier and Product Code fields are filled by PipeLine. You cannot change these fields.

The Effective Date field shows the date the case size becomes active. Shipment amounts are calculated based on the active case size on the

Figure 4-7 – Product Case Sizes add form

shipment's order date. The last case size entered remains active until a new case size with a later effective date is entered.

7. Type the effective date and press <Enter>.

The Qty per Case field shows the product amount in a single case from the selected supplier. PipeLine has some default USAID product case sizes.

8. Type the product amount in a single case size and press <Enter>.

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

9. Type any notes about the case size. Skip this field if it does not apply.

10. Click on the Save button when you finish adding case size data.

11. Click on the Back button to return to the Products Selection form.

12. Click on the Back button to return to the Background Data menu.

Updating Case Size Data

You can update case size data.

From the Main Menu—

1. Click on the Background Data button to display the Background Data Menu.

2. Click on the Products button to display the Products Selection form.

3. Click on the product with the case size data you want to change.

4. Click on the Case Sizes button.

PipeLine displays case size records for the selected product.

5. Click on the case data you want to update.

Figure 4-8 shows an example of selected case size data.

Figure 4-8 — Selected Case Sizes data

6. Click on the Edit button.

The Edit Case Size form is displayed (Figure 4-9).

7. Click on the field you want to update, and enter the new data.

When you finish updating—

Figure 4-9 – Edit Case Size form

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

9. Click on the Back button to return to the Products Selection form.

10. Click on the Back button to return to the Background Data menu.

Deleting Case Size Data

You can delete case size data.

From the Main Menu—

1. Click on the Background Data button to display the Background Data menu.

2. Click on the Products button to display the Products Selection form.

3. Select the product with the case size data you want to delete.

4. Click on the Case Sizes button.

5. Click on the case size data you want to delete.

6. Click on the Delete button.

A confirmation message is displayed.

7. Click on "Yes" to delete the selected case size.

8. Click on the Back button to return to the Products form.

9. Click on the Back button to return to the Background Data menu.

Product Costs

Product costs are accessed through the Products Selection form, and used to set a product's default cost.

Entering Product Cost Data
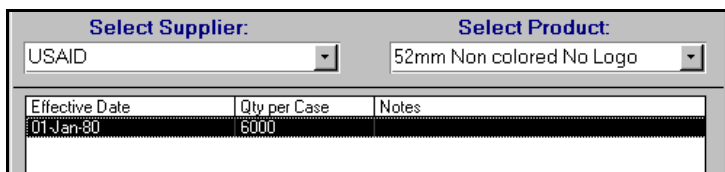
You can enter product cost data.

From the Main Menu—

1. Click on the Background Data button to display the Background Data menu.

2. Click on the Products button to display the Products Selection form.

3. Click on the Costs button.

PipeLine displays cost records for the selected product (Figure 4-10).

Figure 4-10 – Product Cost form

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

4. Click on the arrow next to the Select Supplier field, select the supplier from the pull-down menu, and click on the left mouse button.

5. Click on the arrow next to the Select Product field, select the product from the pull-down menu, and click on the left mouse button.

6. Click on the Add button.

PipeLine displays the Add Product Cost form (Figure 4-11).

PipeLine populates the Product and Supplier fields. You cannot change these fields.

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

7. Type the effective date and press <Enter>.

Figure 4-11 – Add Product Cost form

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

8. Type the product's per unit cost and press <Enter>.

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

9. Enter any relevant notes about the cost. Skip this field if it does not apply.

10. Click on the Save button when you finish adding cost data.

11. Click on the Back button to return to the Products Selection form.

12. Click on the Back button to return to the Background Data menu.

Updating Product Cost Data

You can update cost data.

From the Main Menu—

1. Click on the Background Data button to display the Background Data menu.

2. Click on the Products button to display the Products Selection form.

3. Select the product whose cost data you want to update.

4. Click on the Costs button.

PipeLine displays cost records for the selected product.

5. Click on the cost data you want to update.

Figure 4-12 shows an example of selected cost data.
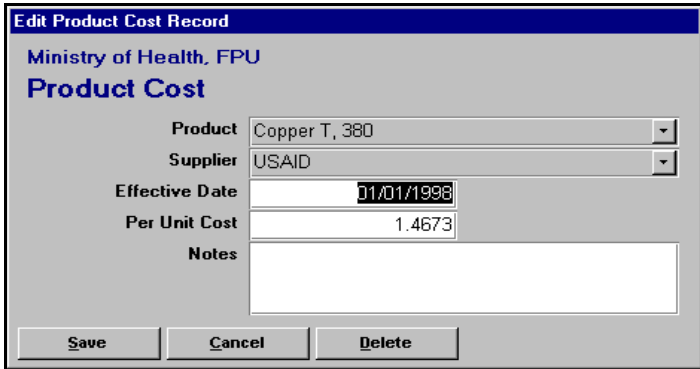
Figure 4-12 — Selected cost data

6. Click on the Edit button.

PipeLine displays the Product Cost form (Figure 4-13).

7. Click on the field you want to update, and enter the new data.

When you finish updating—

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

Figure 4-13 –Product Cost form

9. Click on the Back button to return to the Products Selection form.

10. Click on the Back button to return to the Background Data menu.

Deleting Product Cost Data

You can delete cost data.

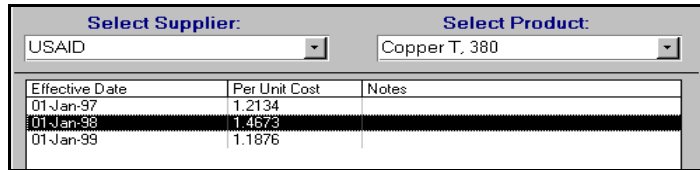From the Main Menu—

1. Click on the Background Data button to display the Background Data menu.

2. Click on the Products button to display the Products Selection form.

3. Select the product whose cost data you want to delete.

4. Click on the Costs button.

PipeLine displays cost records for the selected product.

5. Click on the cost data you want to delete.

6. Click on the Delete button.

A confirmation message is displayed.

7. Click on "Yes" to delete the selected cost record.

8. Click on the Back button to return to the Products Selection form.

9. Click on the Back button to return to the Background Data menu.

Methods

Method refers to a contraceptive method (i.e., condoms, implants, injectables, etc.). It can also be used to categorize similar products (e.g., sexually transmitted infection treatment drugs). You can use the Method button to access method data.

Viewing Method Data

You can view method data.

From the Main Menu—

1. Click on the Background Data button to display the Background Data menu.

2. Click on the Methods button to display the Method Selection form (Figure 4-14).

Figure 4-14 — Sample Methods list

3. Double-click on the method you want to view.

The selected method is displayed (Figure 4-15).

4. Click on Cancel to return to the Method Selection form.

5. Click on the Back button to return to the Background Data menu.
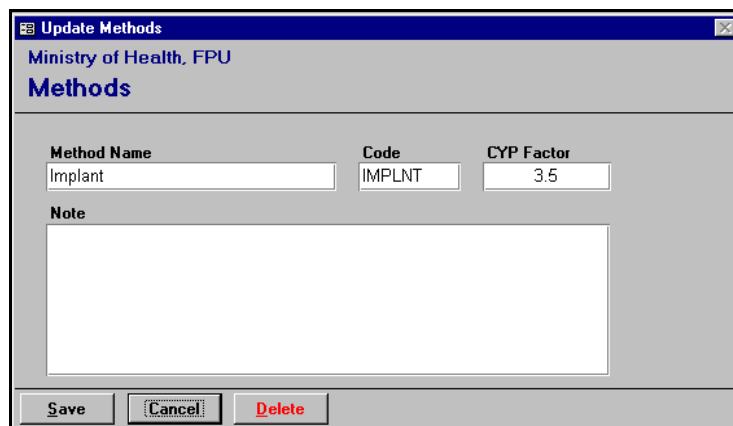
Figure 4-15 — Sample Methods data

Updating Method Data

You can update the method data.

From the Main Menu—

1. Click on the Background Data button to display the Background Data Menu.

2. Click on the Methods button to display the Methods Selection form.

3. Select the method you want to update.

4. Click on the Edit button.

5. Click on the field you want to update, and enter the new data.

When you finish updating—

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

7. Click on the Back button to return to the Background Data menu.

Adding a New Method

You can add a method.

From the Main Menu—

1. Click on the Background Data button to display the Background Data menu.

2. Click on the Methods button to display the Methods Selection form.

3. Click on the Add button.

PipeLine displays a blank Methods form (Figure 4-16).

4. Type the method name and press <Enter>.

The Code field holds the method code. When adding a method, use a code that is less than seven digits and uniquely identifies the method.

Figure 4-16 — Blank Methods form

5. Type the method code and press <Enter>.

The CYP Factor field shows the Couple Years of Protection. This is the fraction of a year of protection provided by one unit of a particular contraceptive.

6. Type the CYP factor and press <Enter>. Skip this field if it does not apply.

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

7. Type any relevant notes in the Note field. Skip this field if it does not apply.

When you finish adding method data—

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

9. Click on the Back button to return to the Background Data menu.

Deleting a Method

You can delete a method.

From the Main Menu—

1. Click on the Background Data button to display the Background Data menu.

2. Click on the Methods button to display the Methods Selection form.

3. Select the method you want to delete.

4. Click on the Delete button.

If the method can be deleted, a message similar to the one in Figure 4-17 is displayed.

5. Click on "Yes" to confirm the delete.

Figure 4-17 — Delete message 1

6. Click on the Back button to return to the Background Data Menu.

If you cannot delete the method (because it is associated with other database records), a message similar to the one in Figure 4-18 is displayed.

7. Click on "OK" to close the message window.
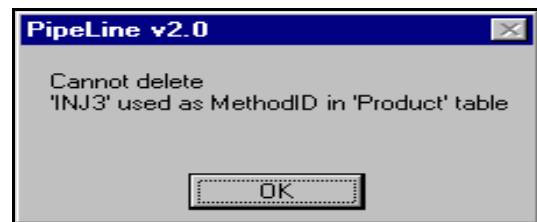
Figure 4-18 — Delete message 2

8. Click on the Back button to return to the Background Data menu.

Suppliers

You can use this option to modify the Supplier pull-down menu, change shipment lead times by supplier, and estimate shipping costs by supplier.

Viewing Suppliers

You can view suppliers.

From the Main Menu—

1. Click on the Background Data button to display the Background Data menu.

2. Click on the Suppliers button to display the Suppliers Selection form (Figure 4-19).

3. Double-click on the supplier you want to view.
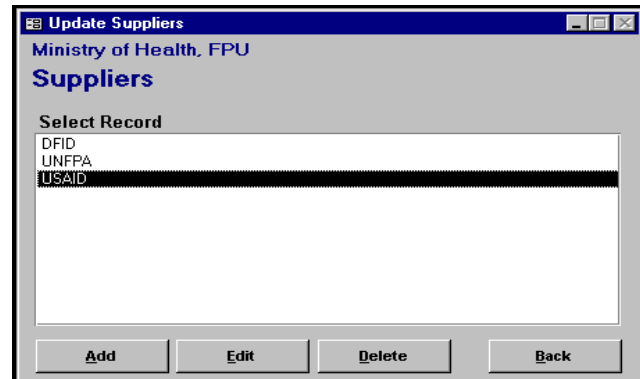
Figure 4-19 — Suppliers Selection form

The selected supplier is displayed (Figure 4-20).
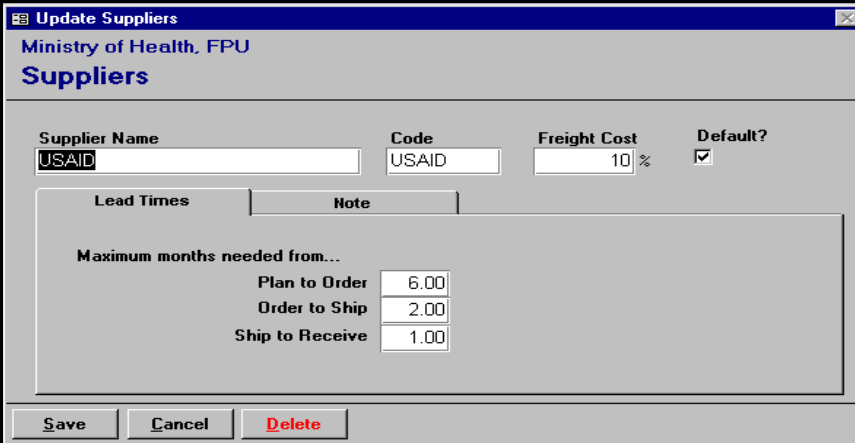
Figure 4-20 — Sample Suppliers form

4. Click on the Cancel button to return to the Suppliers Selection form.

5. Click on the Back button to return to the Background Data menu.

Updating Supplier Data

You can update the supplier data.

From the Main Menu—

1. Click on the Background Data button to display the Background Data menu.

2. Click on the Suppliers button to display the Suppliers Selection form.

3. Select the supplier you want to update.

4. Click on the Edit button.

5. Click on the field you want to update, and enter the new data.

6. Click on the Note tab, and type the reason for the update.

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

8. Click on the Back button to return to the Background Data menu.

Adding a New Supplier

You can add a supplier.

From the Main Menu—

1. Click on the Background Data button to display the Background Data menu.

2. Click on the Suppliers button to display the Suppliers Selection form.

3. Click on the Add button.

PipeLine displays a blank Suppliers form (Figure 4-21).

Figure 4-21 — Blank Suppliers form

4. Type the supplier's name and press <Enter>.

The Code field holds the supplier's code. When adding new suppliers, use a code that is less than seven digits and uniquely identifies the supplier.

5. Type the supplier's code and press <Enter>.

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

> 📄 Always contact the supplier for freight cost estimates.

6. Type the Freight Cost percentage and press <Enter>.

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

7. Click on the Default field if the new supplier is your default supplier.

Lead Times Tab

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

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

The Order to Ship field shows the estimated lead time (in months) expected from the time a shipment is ordered to when it is shipped. The default is 3.00 (three-month lead time). To change the default value—

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

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

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

The Note Tab

You can use the Note tab to add a memo about the supplier.

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

When you finish adding data—

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

2. Click on the Back button to return to the Background Data menu.

Deleting a Supplier

You can delete a supplier.

From the Main Menu—

1. Click on the Background Data button to display the Background Data Menu.

2. Click on the Suppliers button to display the Suppliers Selection form.

3. Select the supplier you want to delete.

4. Click on the Delete button.

If the supplier can be deleted, a message similar to the one in Figure 4-22 is displayed.

5. Click on "Yes" to confirm the delete.

6. Click on the Back button to return to the Background Data menu.
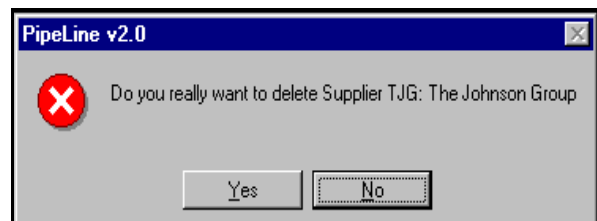
Figure 4-22 — Delete message 1

If you cannot delete the supplier (because it is associated with other database records), a message similar to the one in Figure 4-23 is displayed.

7. Click on "OK" to close the message window.

8. Click on the Back button to return to the Background Data menu.

Figure 4-23 — Delete message 2

Data Sources

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

- **Actual Consumption**
  Lists data sources pull-down menu options for actual consumption records.

- **Forecast Consumption**
  Lists data sources pull-down menu options for forecast consumption records.

- **Inventory**
  Lists data sources pull-down menu options for inventory records, including inventory count and inventory adjustment records.

- **Shipments**
  Lists data sources pull-down menu options for shipment records.

Viewing Data Sources

You can view data sources.

From the Main Menu:

1. Click on the Background Data button to display the Background Data Menu.

2. Click on the Data Sources button.

PipeLine displays the Data Sources Selection form (Figure 4-24) with the current data source displayed.

To view other data sources—

3. Click on the arrow next to the Select Data Sources field, select a data source from the pull-down menu, and click the left mouse button.

4. Click on the Back button to return to the Background Data menu.
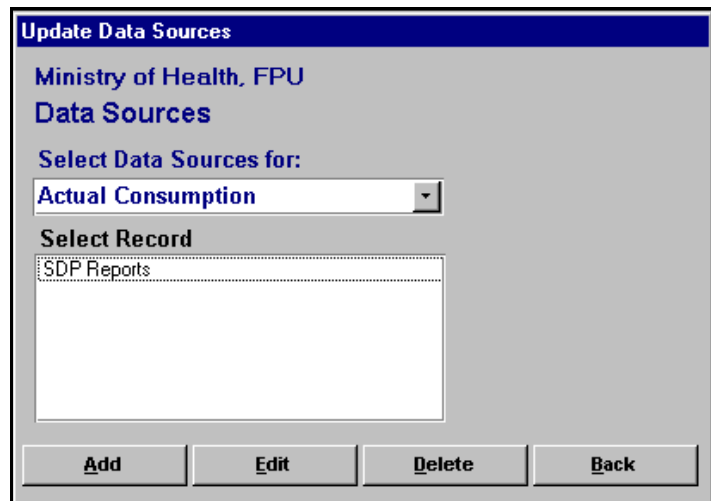
Figure 4-24 — Data Sources Selection form

Updating Data Sources

You can update data sources.

From the Main Menu—

1. Click on the Background Data button to display the Background Data menu.

2. Click on the Data Sources button to display the Data Sources Selection form.

3. Select a data source, then click on the source name you want to update.

4. Click on the Edit button.

The Edit Data Sources form is displayed.

5. Click on the field you want to update, and type the new data.

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

7. Click on the Back button to return to the Background Data menu.

Adding a New Data Source

You can add a new data source.

From the Main Menu—

1. Click on the Background Data button to display the Background Data menu.

2. Click on the Data Sources button to display the Data Sources Selection form.

3. Select the data source you want to add data to.

4. Click on the Add button.

PipeLine displays a blank Data Sources form (Figure 4-25).

Figure 4-25 — Blank Data Source form

5. Type the source name and press <Enter>.

The Code field holds the data source's code. When adding new Data Sources, use a code that is less than seven digits and helps uniquely identify the data source.

6. Type the data source code and press <Enter>.

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

8. Click on the Back button to return to the Background Data menu.

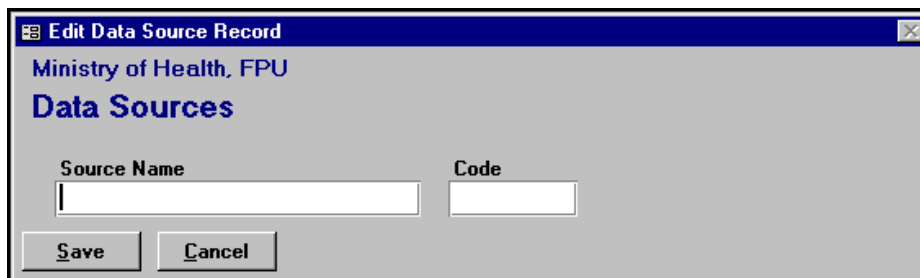# Deleting a Data Source

You can delete a data source.

From the Main Menu—

1. Click on the Background Data button to display the Background Data menu.

2. Click on the Data Sources button to display the Data Sources Selection form.

3. Select the data source you want to delete an entry from.

4. Click on the Delete button.

If the data source can be deleted, a message similar to the one in Figure 4-26 is displayed.

5. Click on "Yes" to confirm the delete.

6. Click on the Back button to return to the Background Data menu.
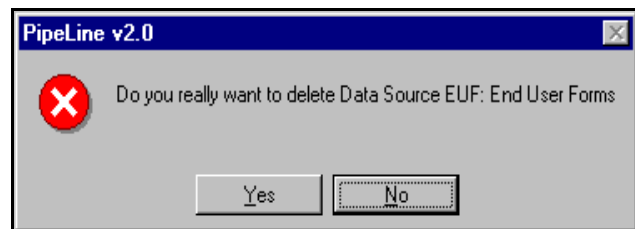
Figure 4-26 — Delete message 1

If you cannot delete the data source (because it is associated with other database records), a message similar to the one in Figure 4-27 is displayed.

7. Click on "OK" to close the message window.

8. Click on the Back button to return to the Background Data menu.
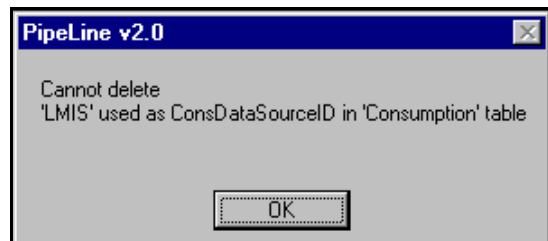
Figure 4-27 — Delete message 2

COMMODITIES DATA

Introduction

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

- **Consumption**
  Stock dispensed by the program to clients

- **Shipments**
  Stock received by the program by suppliers

- **Inventory Count**
  Physical inventory of stock on hand within the entire program

- **Inventory Adjustments**
  Events or transactions that change the stock on hand within the entire program (i.e., loss of expired stock, transfers to or from another program)

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

Consumption

You can use the Consumption option to track actual or forecast consumption quantities of products dispensed to users or sold to clients by the program.

- **Actual Consumption**
  The reported or estimated quantities of product that left the program's logistics system through normal dispense to clients activities.

- **Forecast Consumption**
  The quantities expected to be dispensed in the future.

Viewing Consumption Data

You can view consumption data.

From the Main Menu—

1. Click on the Commodities Data button to display the Commodities menu.

2. Click on the Consumption button to display the Consumption Selection form (Figure 5-1).

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

Figure 5-1 — Consumption Selection form

4. Double-click on the consumption data you want to view.

PipeLine displays the selected data (Figure 5-2).

Figure 5-2 — Sample Consumption data

5. Click on the Cancel button to return to the Consumption Selection form.

6. Click on the Back button to return to the Commodities menu.

Updating Consumption Data

You can update consumption data.

From the Main Menu—

1. Click on the Commodities Data button to display the Commodities menu.

2. Click on the Consumption button to display the Consumption Selection form.

3. Select the consumption data you want to update.

4. Click on the Edit button.

5. Click on the field you want to update, and type the new data.

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

7. Click on the Back button to return to the Commodities menu.

Adding Consumption Data

You can add consumption data.

From the Main Menu—

1. Click on the Commodities Data button to display the Commodities menu.

2. Click on the Consumption button to display the Consumption Selection form.

3. Click on the arrow next to the Select Product field, select the product you want to add consumption data to, and click the left mouse button.

Figure 5-3 — Blank Consumption form

4. Click on the Add button.

PipeLine displays a blank Consumption form (Figure 5-3).

The Product field displays the product you are adding consumption data to. You cannot change this field.

Beginning In

This area lets you set the consumption period. The consumption period can be any number of months.

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

1. Type the four-digit year and press <Enter>.

The Month field shows the month marking the start of the consumption period. For example, "1" shows that the first month of the year is the start of the consumption period.

2. Type the month the consumption period begins and press <Enter>.

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

3. Type the length of the consumption period (in months) and press <Enter>.

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

4. Type the consumption amount and press <Enter>.

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

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

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

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

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

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

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

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

The Display Note field tells PipeLine to include any associated notes in PipeLine reports.

9. Click on the Display Note field if you want PipeLine to include associated notes in reports.

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

11. Click on the Back button to return to the Commodities menu.

Deleting Consumption Data

You can delete consumption data.

From the Main Menu—

1. Click on the Commodities Data button to display the Commodities Menu.

2. Click on the Consumption button to display the Consumption Selection form.

3. Select the consumption data you want to delete.

4. Click on the Delete button.

A confirmation message is displayed.

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

6. Click on the Back button to return to the Commodities menu.

Trend Analysis

You can use the Trend Analysis button to create a report showing a trend analysis of a selected set of consumption data.

> This section provides cursory information on how to create a Trend Analysis report. A complete explanation of this report can be found in Section 7 — PipeLine Reports.

From the Commodities menu—

1. Click on the Consumption button to display the Consumption Selection form.

1. Click on the arrow next to the Select Product field, select a product from the pull-down menu, and click the left mouse button.

2. Select the consumption data that will be used to create a Trend Analysis report.

3. Click on the Trend Analysis button.

PipeLine creates the report and displays the Consumption Trend Analysis form (Figure 5-4).
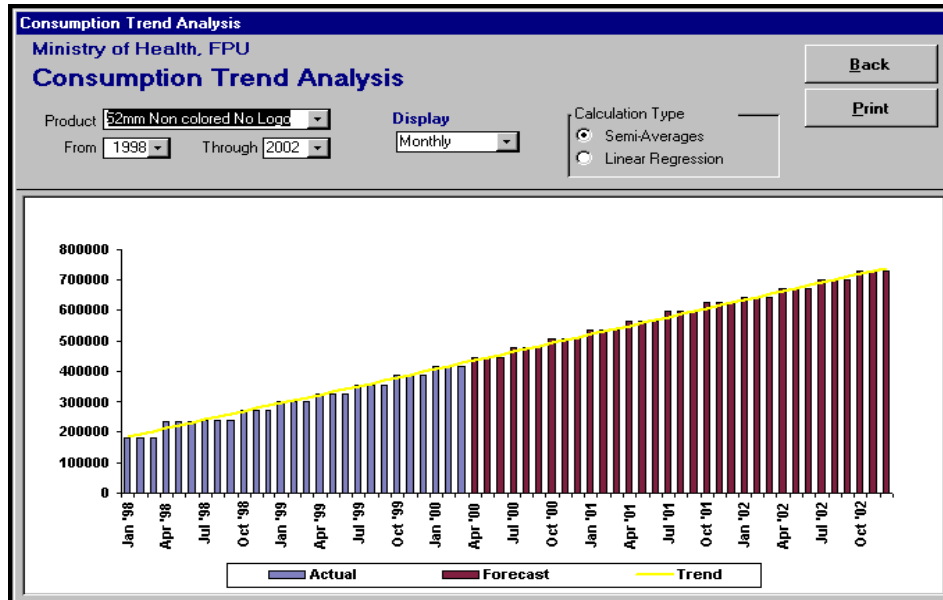
Figure 5-4 — Sample Consumption Trend Analysis form

See *Trend Analysis Report*, in Section 7, for information on printing the report.

When the printout is complete—

4. Click on the Back button to return to the Consumption Selection form.

5. Click on the Back button to return to the Commodities menu.

Shipments

You can use the Shipment option to add and modify shipping data.

Viewing Shipment Data

You can view the shipping data.

From the Main Menu—

1. Click on the Commodities Data button to display the Commodities menu.

2. Click on the Shipments button to display the Shipments Selection form (Figure 5-5).

Figure 5-5 — Shipments Selection form

3. Click on the arrow next to the Select Product field, select the product shipping data you want to view, and click the left mouse button.

4. Double-click on the shipping data you want to view.

PipeLine displays the selected data (Figure 5-6).

5. Click on the Cancel button to return to the Shipments Selection form.

Figure 5-6 — Selected shipment data

6. Click on the Back button to return to the Commodities menu.

Updating Shipment Data

You can update the shipment data.

From the Main Menu—

1. Click on the Commodities Data button to display the Commodities menu.

2. Click on the Shipments button to display the Shipments Selection form.

3. Select the shipment data you want to update.

4. Click on the Edit button.

5. Click on the field you want to update, and type the new data.

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

7. Click on the Back button to return to the Commodities menu.

Adding Shipment Data

You can add shipment data.

From the Main Menu—

1. Click on the Commodities Data button to display the Commodities menu.

2. Click on the Shipments button to display the Shipments Selection form.

3. Click on the arrow next to the Select Product field, select the product receiving the shipment data to, and click the left mouse button.

4. Click on the Add button.

PipeLine displays a blank Shipments form (Figure 5-7).

The Product field shows the product receiving shipment data. You cannot change this field.

Figure 5-7 — Blank Shipments form

5. Type the shipment's quantity (in units) and press <Enter>.

The Status field shows the shipment's status.

6. Click on the arrow next to the Status field, select the shipment status from the pull-down menu, and click the left mouse button.

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

7. Type the shipment's receipt date and press <Enter>.

	Enter the date based on your computer's ***Regional Setting***.
	Always enter a four-digit year (i.e., 1996, 1997, 2001).

The ID field uniquely identifies the shipment. You can use the NEWVERN shipment number, a purchase order number, invoice number, or any other unique identifier.

8. Type the shipment ID and press <Enter>, or skip this field to accept the PipeLine-supplied ID.

9. Click on the arrow next to the Supplier field, select the product's supplier from the pull-down menu, and click the left mouse button.

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

10. Click on the arrow next to the Data Source field, select the data source from the pull-down menu, and click the left mouse button.

Shipment Data Tab

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

Order (actual/estimated)

The top field shows the actual date the shipment was or is to be ordered. The Estimated field (populated by the system when you select the supplier) is calculated based on lead times for the supplier.

1. Click on the top field and type the shipment's order date, or skip this field to accept the computer-generated estimate.

	Enter the date based on your computer's ***Regional Setting***.
	Always enter a four-digit year (i.e., 1996, 1997, 2001).

Ship (actual/estimated)

The top field shows the date the shipment was or is to be shipped. The Estimated field (populated by the system when you select the supplier) is calculated based on lead times for the supplier.

1. Click on the top field and type the ship date, or skip this field to accept the computer-generated estimate.

> Enter the date based on your computer's ***Regional Setting***.
>
> Always enter a four-digit year (i.e., 1996, 1997, 2001).

Value (actual/estimated)

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

1. Click on the Actual field and type the shipment's exact cost. Or skip this field to accept the computer-generated estimate.

Freight (actual/estimated)

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

2. Click on the top field and type the shipment's actual freight cost, or skip this field to accept the computer-generated estimate.

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

3. Click on the Note tab, and type any relevant notes about the shipment.

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

5. Click on the Back button to return to the Commodities menu.

Copying Shipment Data

The Copy option lets you copy existing shipment data. Copied data can be edited to reflect a particular shipment, reducing the amount of data entry required.

From the Main Menu—

1. Click on the Commodities Data button to display the Commodities menu.

2. Click on the Shipments button to display the Shipments Selection form.

3. Select the shipment data you want to copy.

4. Click on Copy button to display the shipment from the selected data.

5. Update the form as needed.
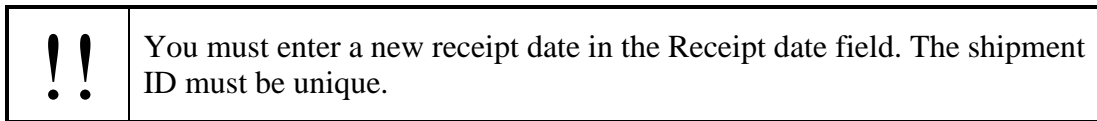
> **! !** You must enter a new receipt date in the Receipt date field. The shipment ID must be unique.

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

7. Click on the Back button to return to the Commodities Menu.

Deleting Shipment Data

You can delete shipment data.

From the Main Menu—

1. Click on the Commodities Data button to display the Commodities menu.

2. Click on the Shipments button to display the Shipments Selection form.

3. Select the shipment data you want to delete.

4. Click on the Delete button.

A confirmation message is displayed.

5. Click on "Yes" to delete the selected shipment data.

6. Click on the Back button to return to the Commodities menu.

Inventory Count

You can use the Inventory Count option to track products that are already in stock or during a physical inventory of your entire program when the stock balances are known or estimated.

Viewing Inventory Count Data

You can view inventory count data.

From the Main Menu—

1. Click on the Commodities Data button to display the Commodities menu.

2. Click on the Inventory Count button to display the Inventory Count Selection form (Figure 5-8).

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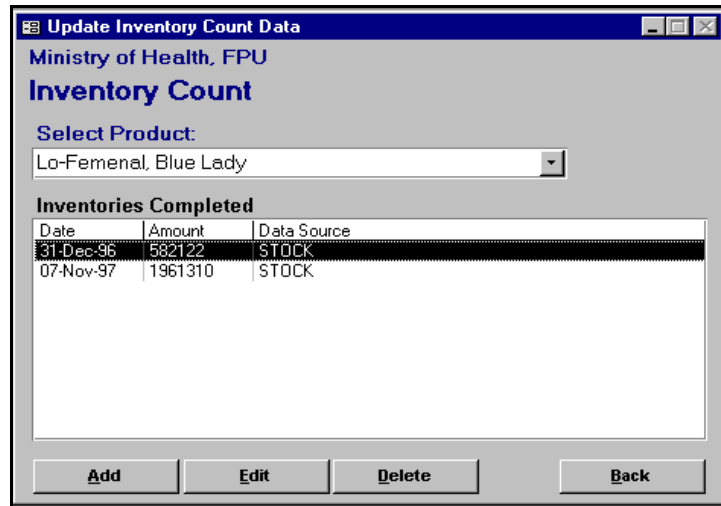

Figure 5-8 — Inventory Count Selection form

4. Double-click on the Inventory Count record you want to view.
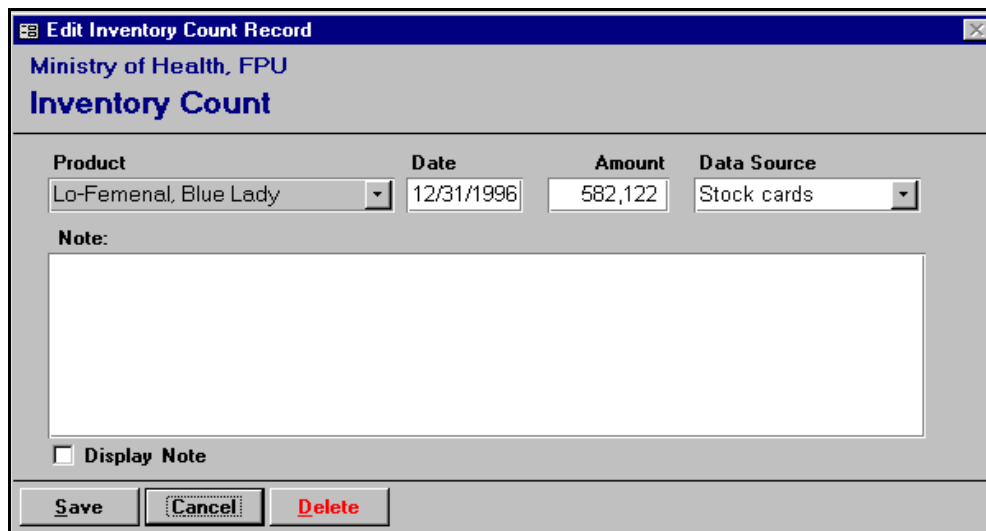
PipeLine displays the selected data (Figure 5-9).

Figure 5-9 — Selected Inventory Count data

5. Click on the Cancel button to return to the Inventory Count Selection form.

6. Click on the Back button to return to the Commodities menu.

Updating Inventory Count Data

You can update inventory count data.

From the Main Menu—

1. Click on the Commodities Data button to display the Commodities menu.

2. Click on the Inventory Count button to display the Inventory Count Selection form.

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

4. Click on the inventory count record you want to update.

5. Click on the Edit button.

6. Click on the field you want to update, and type the new data.

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

8. Click on the Back button to return to the Commodities menu.

Adding Inventory Count Data

You can add inventory count data.

From the Main Menu—

1. Click on the Commodities Data button to display the Commodities menu.

2. Click on the Inventory Count button to display the Inventory Count Selection form.

3. Click on the arrow next to the Select Product field, select the product where you want to add an inventory count record, and click the left mouse button.

4. Click on the add button.

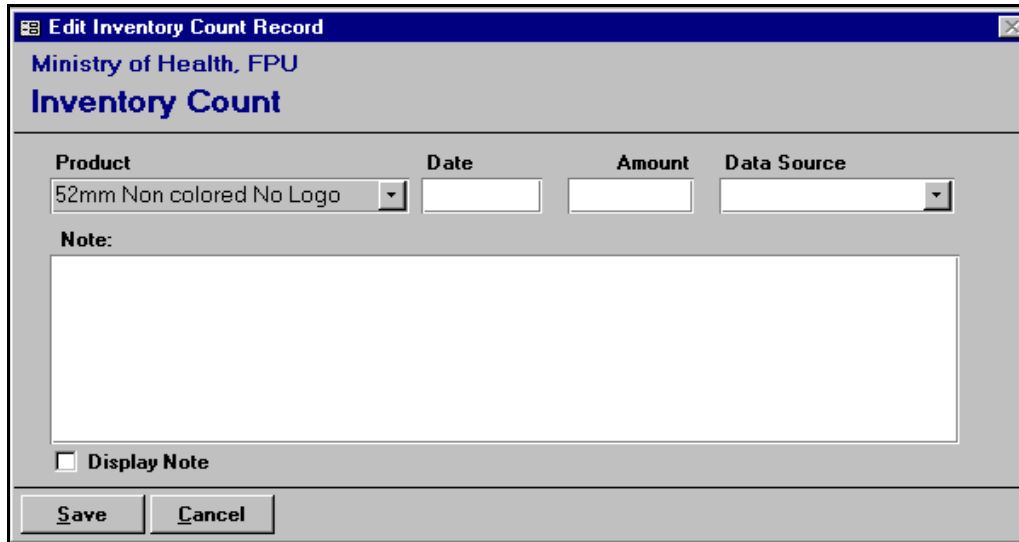A blank Inventory Count form is displayed (Figure 5-10).

Figure 5-10 — Blank Inventory Count form

The Product field displays the product receiving the inventory count record. You cannot change this field.

The Date field displays the date the physical inventory count occurred (or the date of the most accurate count).

5. Type the inventory date and press <Enter>.

	Enter the date based on your computer's *Regional Setting*.
	Always enter a four-digit year (i.e., 1996, 1997, 2001).
	The date in the Date field must be the last day of the month.
	If the Inventory Amount is a mid-month balance, adjust for activity later in the month and enter it. If the Inventory Amount is a beginning month balance, enter it as the ending month balance of the previous month.

The Amount field displays the amount of product in stock (in units) throughout your program. This value includes storage facilities and service delivery points.

6. Type the inventory amount and press <Enter>.

The Data Source field displays the source of the inventory count data.

7. Click on the arrow next to the Data Source field, select the source of the inventory count from the pull-down menu, and click the left mouse button.

The Note field is a memo field for additional information about the inventory count.

8. Click on the Note field, and type any relevant information about the inventory count.

9. Click on the Display Note field if you want the note to be displayed on PipeLine reports.

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

11. Click on the Back button to return to the Commodities menu.

Deleting Inventory Count Data

You can delete inventory count data.

From the Main Menu—

1. Click on the Commodities Data button to display the Commodities menu.

2. Click on the Inventory Count button to display the Inventory Count Selection form.

3. Select the inventory count record you want to delete.

4. Click on the Delete button.

A confirmation message is displayed.

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

6. Click on the Back button to return to the Commodities menu.

Inventory Adjustments

You can use the Inventory Adjustments option to record positive or negative quantities that change a program's stock balance. These changes are not due to consumption or shipment. They are, most often, due to losses or transfers.

Viewing Inventory Adjustments

You can view inventory adjustments.

From the Main Menu—

1. Click on the Commodities Data button to display the Commodities menu.

2. Click on the Inventory Adjustments button to display the Inventory Adjustment Selection form (Figure 5-11).

Figure 5-11 — Inventory Adjustment Selection form

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

4. Double-click on the inventory adjustment data you want to view.

PipeLine displays the selected record (Figure 5-12).

Figure 5-12 — Sample Inventory Adjustment data

5. Click on the Cancel button to return to the Inventory Adjustment Selection form.

6. Click on the Back button to return to the Commodities menu.

Updating Inventory Adjustments Data

You can update inventory adjustments.

From the Main Menu—

1. Click on the Commodities Data button to display the Commodities menu.

2. Click on the Inventory Adjustments button to display the Inventory Adjustment Selection form.

3. Select the inventory adjustment data you want to update.

4. Click on the Edit button.

5. Click on the field you want to update, and type the new data.

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

7. Click on the Back button to return to the Commodities menu.

Adding Inventory Adjustment Data

You can add inventory adjustments.

From the Main Menu—

1. Click on the Commodities Data button to display the Commodities menu.

2. Click on the Inventory Adjustments button to display the Inventory Adjustment Selection form.

3. Click on the arrow next to the Select Product field, select the product you want from the pull-down menu, and click the left mouse button.

4. Click on the Add button.

PipeLine displays a blank Inventory Adjustment form (Figure 5-13).

Figure 5-13 — Blank Inventory Adjustments form

The Product field is populated with the selected product. You cannot change this field.

The Date field shows the date the adjustment occurred or is expected to occur.

5. Type the date of the adjustment and press <Enter>.

> Enter the date based on your computer's *Regional Setting*.
>
> Always enter a four-digit year (i.e., 1996, 1997, 2001).

The Amount field shows the adjustment amount (in units).
- A loss is recorded as a negative number (i.e., -1, -33, -100, etc.). This adjustment is *subtracted* from the month's balance.

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

6. Type the inventory adjustment amount and press <Enter>.

The Data Source field displays the source of the adjustment data.

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

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

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

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

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

10. Click on the Back button to return to the Commodities menu.

Deleting Inventory Adjustment Data

You can delete inventory adjustments.

From the Main Menu—

1. Click on the Commodities Data button to display the Commodities menu.

2. Click on the Inventory Adjustments button to display the Inventory Adjustment Selection form.

3. Select the inventory adjustment data you want to delete.

4. Click on the Delete button.

A confirmation message is displayed.

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

6. Click on the Back button to return to the Commodities menu.

PIPELINE GRAPHS

Introduction

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

Stock Status

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

Consumption

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

Couple Years of Protection (CYP)

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

Stock Status Graph

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

Use this graph in discussions with policymakers, donors, and other suppliers to provide a quick overview of your stock situation. If the graph shows forecast stock levels significantly below your minimum, or if it projects that you will stockout of the product or method, you should initiate plans to obtain additional supplies. You may also need to review your consumption forecast for accuracy.

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

Creating A Graph for the Current Product or Method

You can create a Stock Status graph for the current product or method.

From the Main Menu—

1. Click on the Graphs button to display the Graphs menu.

2. Click on Stock Status button.

The graph is based on the last product or method updated or displayed. The default time period is five years, which includes the current year, previous two years, and following two years. Figure 6-1 shows the Stock Status graph form. Use this form to create graphs for a product or method.
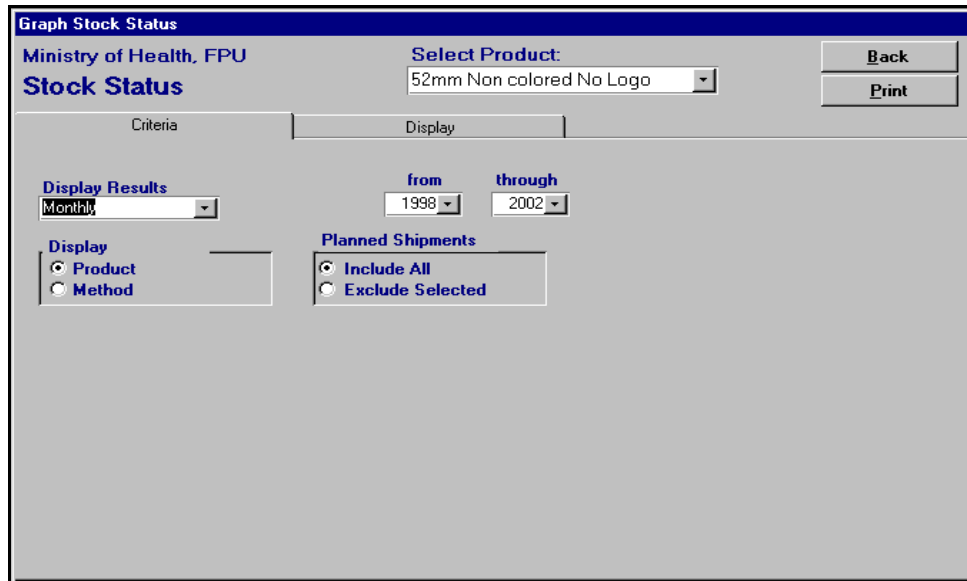

Figure 6-1 – Stock Status graph form

Excluding Planned Shipments

You can exclude planned shipments from the graph.

1. Click on the Exclude Selected field.

The Select Suppliers To Exclude box is opened (Figure 6-2).

2. Click on the suppliers whose planned products you want excluded from the graph.
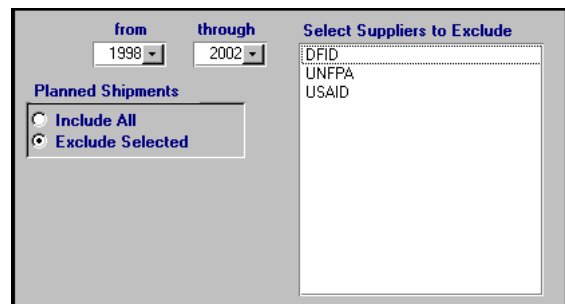

Figure 6-2 — Select Suppliers to Exclude box

Displaying the Stock Status Graph

You can use the Display tab to preview the Stock Status graph.

1. Click on the Display tab.

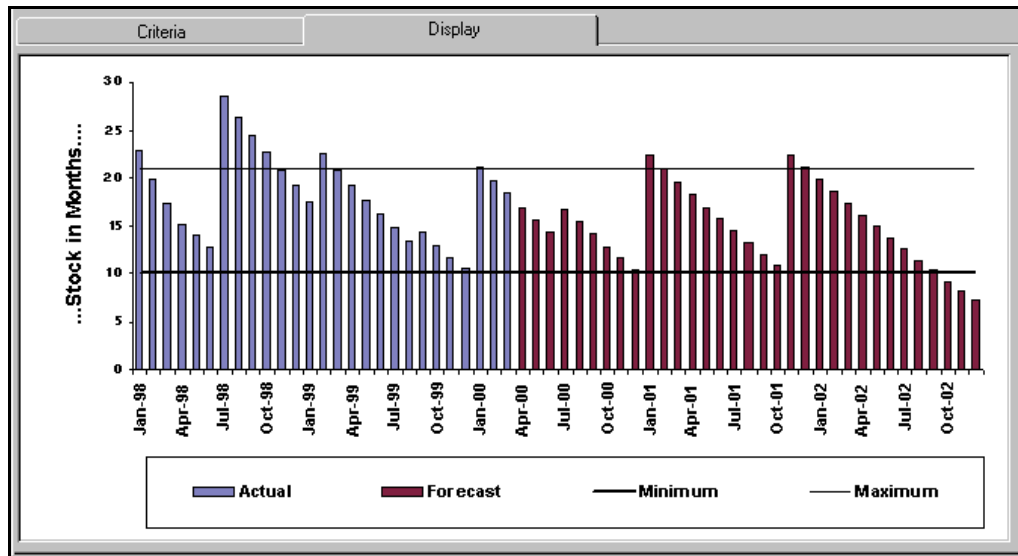The Stock Status graph is created and displayed similar to Figure 6-3.

Figure 6-3 — Sample Stock Status graph display

Printing the Stock Status Graph

You can use the Print button to print the Stock Status graph.

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

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

3. Click on the close icon 🚪 to return to the Stock Status form.

Creating a Graph for a Different Product or Method

You can create a graph for a different product or method by selecting the necessary data from the pull-down menus on the Stock Status form.

1. Click on the Product field (under "Display") to select a product.
                                            OR
2. Click on the Method field (under "Display") to selected a method.

3. Click on the arrow next to the Select Product/Method field, select a product or method from the pull-down menu, and click the left mouse button.

4. Click on the Include All field (under "Planned Shipments") to include all shipments.

OR

5. Click on the Exclude Selected field (under "Planned Shipments") to exclude planned shipments of selected suppliers.

> 📄   If you select Exclude Selected, select the suppliers you do not want included on the graph. See Excluding Planned Shipments on page 6-2.

6. Click on the arrow next to the Display Results field, select "Monthly" to display the data by month or "Quarterly" to display the data by quarter, and click the left mouse button.

7. Click on the arrow next to the From field, select the starting year of the report period, and click the left mouse button.

8. Click on the arrow next to the Through field, select the last year of the report period, and click the left mouse button.

Displaying the Stock Status Graph

You can use the Display tab to preview the Stock Status graph.

1. Click on the Display tab.

The Stock Status graph is created and displayed.

Printing the Stock Status Graph

You can print the new Stock Status Graph at any time.

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

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

3. Click on the close icon 🚪 to return to the Stock Status form

4. Click on the Back button to return to the Graphs menu.

Consumption Graph

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

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

Creating a Graph for the Current Product or Method

You can create a Consumption graph for the current product or method.

From the Main Menu—

1. Click on the Graphs button to display the Graphs menu.

2. Click on the Consumption button.

The graph is based on the last product or method and period updated or displayed. The default period is five years (the previous two years, current year, and following two years). Figure 6-4 displays the Consumption Graph form, which is displayed after the graph is created. Use this form to create graphs for other products/methods.
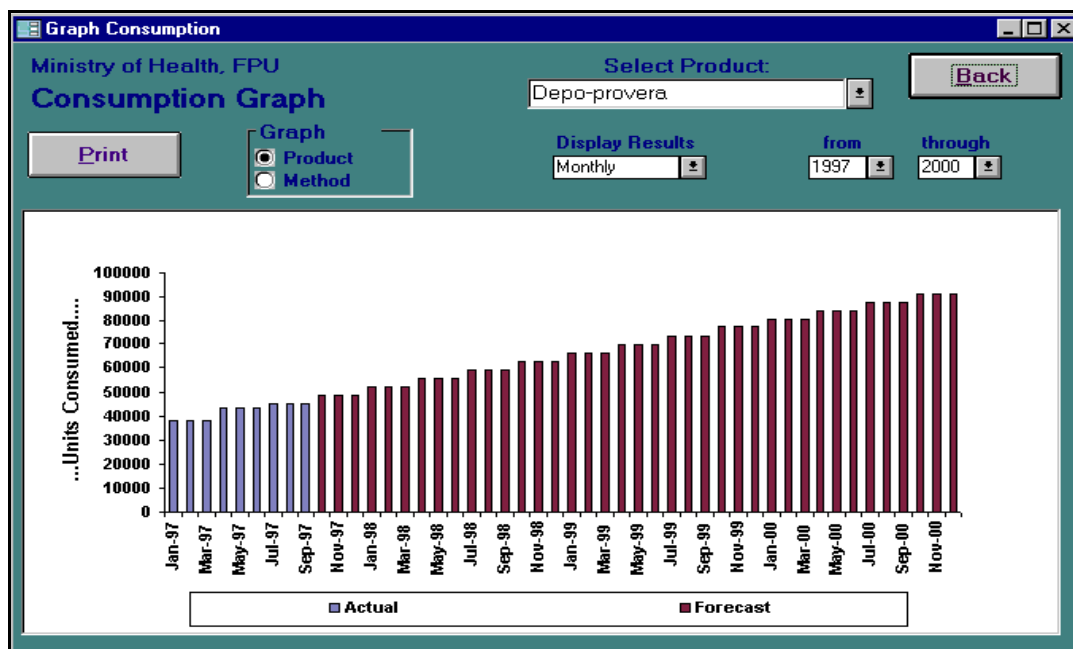

Figure 6-4 – Consumption Graph form

Printing the Consumption Graph

You can print the Consumption Graph.

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

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

3. Click on the close icon 🔲 to return to the Consumption Graph form

4. Click on the Back button to return to the Graphs menu.

Creating a Graph for a Different Product or Method

You can create a graph for a different product or method by selecting the necessary data from the pull-down menus on the Consumption Graph form.

1. Click on the Product field (under "Graph") to select a product.
                                    OR
2. Click on the Method field (under "Graph") to select a method.

> ▤   Each time you select from the Consumption Graph form, PipeLine
>   redraws the Consumption graph, based on your selection.

3. Click on the arrow next to the Select Product/Method field, select a product or method from the pull-down menu, and click the left mouse button.

4. Click on the arrow next to the Display Results field, select "Monthly" to display the data by month or "Quarterly" to display the data by quarter, and click the left mouse button.

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

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

Printing the Consumption Graph

You can print the new Consumption Graph at any time.

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

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

3. Click on the close icon [image] to return to the Consumption Graph form.

4. Click on the Back button to return to the Graphs menu.

Couple Years of Protection (CYP) Graph

The Couple Years of Protection (CYP) graph converts consumption data for the selected product(s) or method(s) to CYP units using the conversion factors in the methods table (Background menu).

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

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

Use this graph in discussions evaluating and monitoring program coverage and achievement. (See the *FPPMES User's Manual* for more information.)

Creating the CYP Graph

You can create a CYP graph.

From the Main Menu—

1. Click on the Graphs button to display the Graphs menu.

2. Click on the Couple Years Of Protection (CYP) button.

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

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

The number of CYPs is calculated by multiplying products/methods dispensed by the appropriate conversion factor. If 100 Depro-Provera injections were dispensed during a quarter, then 25 CYPs were generated (100 x .25). Figure 6-5 shows the Couple Years of Protection Graph form. Use this form to create graphs for a selected product or method.

Figure 6-5 — CYP Graph form

3. Click on the Product field (under "Graph") to select a product.
<div align="center">*OR*</div>
4. Click on the Method field (under "Graph") to select a method.

5. Click on the Product/Method (under "Select") you want included on the graph.

6. Click on the arrow next to the Display Results field, select "Monthly" to display the data by month or "Quarterly" to display the data by quarter, and click the left mouse button.

7. Click on the arrow next to the From field, select the starting year of the report period, and click the left mouse button.

8. Click on the arrow next to the Through field, select the last year of the report period, and click the left mouse button.

Displaying the CYP Graph

You can use the Display tab to preview the CYP graph before you print it.

1. Click on the Display tab.

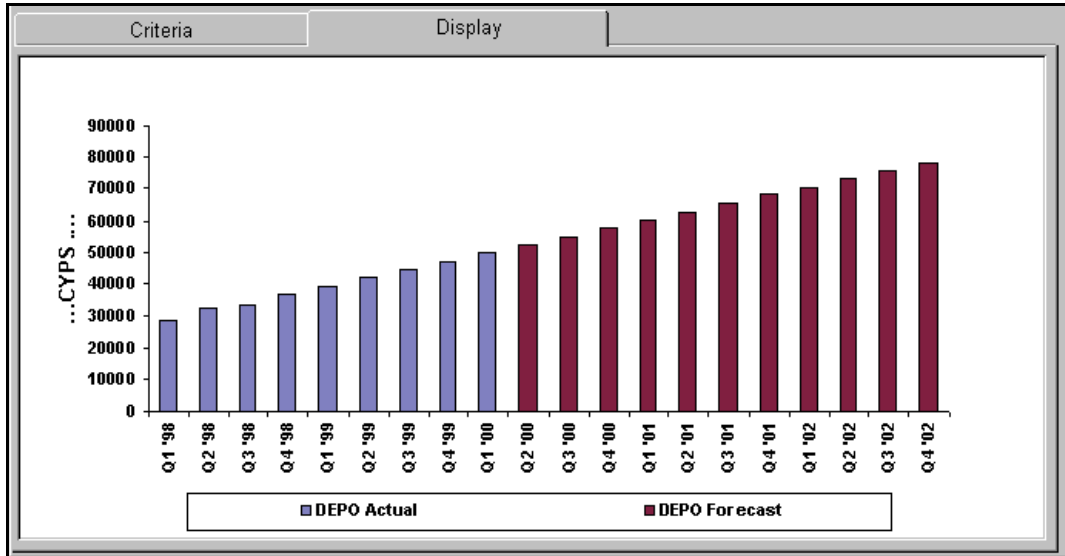The CYP graph is created and displayed as shown in Figure 6-6.

Figure 6-6 — Sample CYP Graph display

Printing the CYP Graph

You can print the CYP graph at any time.

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

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

3. Click on the close icon 🚪 to return to the CYP graph form.

4. Click on the Back button to return to the Graph menu.

Exporting the CYP Graph

You can export a CYP graph.

From the Main Menu—

1. Click on the Graphs button to display the Graphs menu.

2. Click on the Couple Years of Protection (CYP) button.

3. Create a CYP graph for a selected product/method.
   See Creating the CYP Graph beginning on page 6-7.

4. Click on the Display tab to display the graph you created.

5. Click on the Export button.

PipeLine displays the Export CYP Data window
(Figure 6-7). Use the options in this window to
arrange the data in a Microsoft Office Excel
spreadsheet.

Figure 6-7 — Export CYP Data window

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

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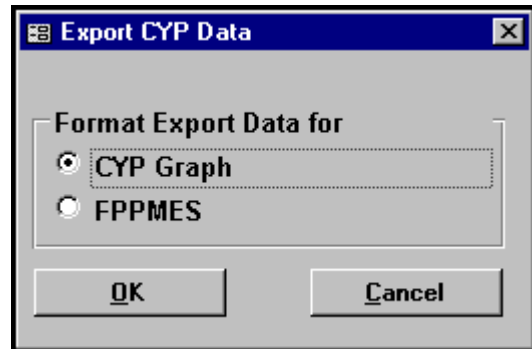 Planning Program Monitoring and Evaluation System.

The default is CYP Graph.

6. Click on the OK button to accept the default.
                        OR
7. Click on FPPMES, and click on the OK button.

PipeLine displays the Output window
(Figure 6-8) with the default file name
(based on your selection) displayed in
the File Name field.

8. Click on the OK button to
   accept the default.
                OR
9. Click on the File Name field
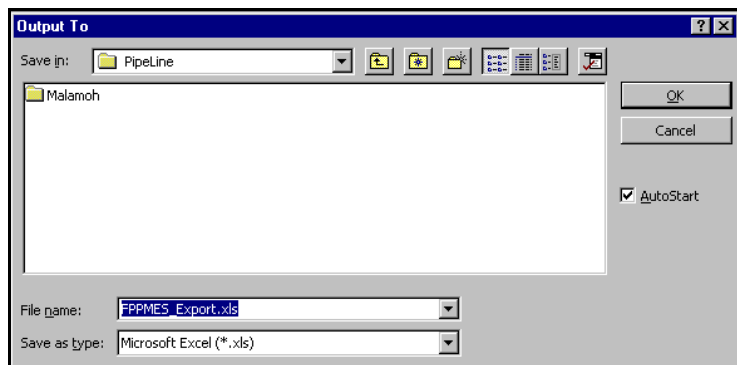   and type the export file's name.

Figure 6-8 — Output window

10. Click on the OK button.

PipeLine exports the data and opens a Microsoft Excel spreadsheet with the exported file
displayed.

▤ Explanations of Microsoft Excel and the Family Planning Program Monitoring and Evaluation System are beyond the scope of this manual. Please see your Microsoft Office documentation and/or the Family Planning Program Monitoring and Evaluation System manual for more information.

11. Click on the File option to display Excel's File pull-down menu.

12. Click on the Exit option to return to PipeLine.

13. Click on the Back button to return to the Graphs menu.

PIPELINE REPORTS

Introduction

This section describes the PipeLine reports. Guidance on how to interpret and use the output for pipeline monitoring and procurement planning is also included.

Stock Status

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

Pipeline Action

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

Pipeline Problem

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

Shipment Action by Supplier

Report showing planned, ordered, and shipped shipments for a selected supplier.

Consumption Trend Analysis

Report/graph showing a straight trend through actual consumption data and reporting the trend by month/year or quarter/year up to ten years into the future.

Shipment Costs by Supplier (*Shipment Reports Menu*)

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

Shipment Costs by Product (*Shipment Reports Menu*)

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

Shipment Order (*Shipment Reports Menu*)

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

Annual Shipment Costs (*Shipment Reports Menu*)

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

Contraceptive Procurement Table (CPT)

Report that generates data in the format used in USAID's Contraceptive Procurement Tables (CPT).

Stock Status Report

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

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

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

Creating a Report for the Current Product or Method

You can create a Stock Status report for the current product or method.

From the Main Menu—

1. Click on the Reports button to display the Reports menu.

2. Click on the Stock Status button.

The report is based on the last updated or displayed product. The default period is five years (the previous two years, current year, and following two years). You can change these parameters after the report is generated by selecting another product or year from the pull-down menus. Figure 7-1 shows the Stock Status report form. Use this form to create reports for other products/methods.

Figure 7-1 – Stock Status report form

> The desired minimum and maximum months of stock for the products are displayed in the report screen header.

Excluding Planned Shipments

You can exclude planned shipments from the report.

1. Click on the Exclude Selected field.

The Select Suppliers to Exclude box is opened (Figure 7-2).

2. Click on the suppliers whose planned products you do not want included in the report.

Figure 7-2 — Select Suppliers to Exclude box

Displaying the Stock Status Report

You can use the Display tab to preview the Stock Status report before you print it.

1. Click on the Display tab.

The Stock Status report is created and displayed similar to the sample (Figure 7-3).

Month	Beginning Balance	----------Shipments----------			Consumption Amount / Actual?		Stock Adjustment	Ending Balance	Stock in Months	Shortfall / Surplus	Desired Stock
		Quantity	Status	Supplier							
Jan-98	4,000,000	270,000	Received	USAID	178,897	☑	0	4,091,103	22.9	334,287	
Feb-98	4,091,103				178,897	☑	0	3,912,206	19.9		
Mar-98	3,912,206				178,896	☑	0	3,733,310	17.4		
Apr-98	3,733,310				232,516	☑	0	3,500,794	15.1		
May-98	3,500,794				232,516	☑	0	3,268,278	13.9		
Jun-98	3,268,278				232,515	☑	0	3,035,763	12.8		
Jul-98	3,035,763	4,002,000	Received	USAID	238,230	☑	0	6,799,533	28.5	1,796,724	
Aug-98	6,799,533				238,230	☑	0	6,561,303	26.4	1,350,825	
Sep-98	6,561,303				238,229	☑	0	6,323,074	24.5	904,927	
Oct-98	6,323,074				267,896	☑	0	6,055,178	22.6	429,362	
Nov-98	6,055,178				267,896	☑	0	5,787,282	20.8		
Dec-98	5,787,282				267,896	☑	0	5,519,386	19.2		
Jan-99	5,519,386				297,562	☑	0	5,221,824	17.5		
Feb-99	5,221,824	2,000,000	Received	DFID	297,562	☑	0	6,924,262	22.5	467,791	
Mar-99	6,924,262				297,563	☑	0	6,626,699	20.9		

Figure 7-3 — Sample Stock Status report display

The Stock Status report may contain more rows than your screen can display at one time.

2. Click on the Vertical Scroll bar arrows ▼ ▲ to scroll up and down.

Printing the Stock Status Report

You can use the Print button to print the Stock Status report.

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

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

3. Click on the close icon ⏻ to return to the Stock Status form.

Creating a Report for a Different Product or Method

You can create a report for a different product or method by selecting the necessary data from the pull-down menus on the Stock Status form.

1. Click on the Product field (under "Display") to select a product.
<p align="center">*OR*</p>
2. Click on the Method field (under "Display") to select a method.

3. Click on the arrow next to the Select Product/Method field, select a product or method from the pull-down menu, and click the left mouse button.

4. Click on the Include All field (under "Planned Shipments") to include all shipments.

OR

5. Click on the Exclude Selected field (under "Planned Shipments") to exclude planned shipments of selected suppliers.

> If you select Exclude Selected, select the suppliers you want included on the report. See Excluding Planned Shipments on page 7-3.

6. Click on the arrow next to the Display Results field, select "Monthly" to display the data by month or "Quarterly" to display the data by quarter, and click the left mouse button.

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

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

Displaying the Stock Status Report

You can use the Display tab to preview the Stock Status report before you print it.

1. Click on the Display tab.

The Stock Status report is created and displayed.

The Stock Status report may contain more rows than your screen can display at one time.

1. Click on the Vertical Scroll bar arrows ▼ ▲ to scroll up and down.

Printing the Report

You can print the new Stock Status report at any time.

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

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

3. Click on the close icon [icon] to return to the Stock Status form.

4. Click on the Back button to return to the Reports Menu.

Pipeline Action Report

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

Plan Shipment

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

Confirm Shipment Ordered

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

Confirm Shipment Dispatched

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

Confirm Shipment Received

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

Surplus, Change

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

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

Creating a Pipeline Action Report

You can create a Pipeline Action report.

From the Main Menu—

1. Click on the Reports button to display the Reports menu.

2. Click on the PipeLine Action button.

The report is generated based on all shipments and needed quantities for active products, and then displayed to the screen. "Received" shipments are not included. Figure 7-4 shows the Pipeline Action form, which is displayed after the report is created.

Figure 7-4 – Pipeline Action form

Printing the Pipeline Action Report

You can print the Pipeline Action report.

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

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

3. Click on the close icon 🚪 to return to the Pipeline Action form.

4. Click on the Back button to return to the Reports menu.

Pipeline Problem Report

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

Below Minimum

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

Stockout

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

Above Maximum

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

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

Creating the Pipeline Problem Report

You can create a Pipeline Problem report.

From the Main Menu—

1. Click on the Reports button to display the Reports menu.

2. Click on the PipeLine Problem button.

The report is based on actual and expected stock levels for active products. Figure 7-5 is an example of the Pipeline Problem form.

Figure 7-5 – Pipeline Problem form

Printing the Pipeline Problem Report

You can print the Pipeline Problem report at any time.

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

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

3. Click on the close icon 🚪 to return to the Pipeline Action form.

4. Click on the Back button to return to the Reports menu.

Shipment Action by Supplier Report

The Shipment Action by Supplier report creates an analysis of a selected supplier's shipments and information on needed procurement actions. It displays planned, ordered, and shipped shipments organized by the date of the next action you must take to ensure timely receipt.

Use this report when negotiating with suppliers and when monitoring pending shipments. Although the supplier is responsible for ensuring each shipment proceeds from planned to ordered to shipped in a timely fashion, you must ensure that they do so. On or before the date an action is required, contact the supplier to discuss the shipment's progress—and needed actions.

Creating a Shipment Action Report for the Current Supplier

You can create a Shipment Action by Supplier Report for the current supplier.

From the Main Menu—

1. Click on the Reports button to display the Reports menu.

2. Click on the Shipment Action by Supplier button.

The report is created based on shipments for the selected supplier (except "Received") for active products, and displayed. Figure 7-6 shows the Shipment Action By Supplier form. Use this form to create shipment action reports for other suppliers.

Figure 7-6 – Shipment Action By Supplier form

Printing the Shipment Action by Supplier Report

You can print the Shipment Action by Supplier report at any time.

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

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

3. Click on the close icon to return to the Shipment Action by Supplier form.

4. Click on the Back button to return to the Reports menu.

Creating a Shipment Action Report for a Different Supplier

You can create a Shipment Action by Supplier report for a different supplier by selecting a different supplier from the pull-down menu on the Shipment Action By Supplier form.

> Each time you pick from the Shipment Action by Supplier form, PipeLine recalculates the report based on your selection.

1. Click on the arrow next to the Select Supplier field, select a supplier from the pull-down menu, and click the left mouse button.

Printing the Shipment Action by Supplier Report

You can print the new Shipment Action by Supplier Action report.

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

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

3. Click on the close icon to return to the Shipment Action by Supplier form.

4. Click on the Back button to return to the Reports menu.

Trend Analysis Report

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

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

- **Linear Regression**
  This method is a statistical formula applied to the actual consumption data series to minimize the distance of the data series points from the trend.

The report shows consumption data in PipeLine and the trend of the actual consumption data. Forecast consumption data are displayed in a bar graph and report, not in the trend calculation.

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

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

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

Creating a Trend Analysis Report for the Current Product

You can create a Trend Analysis report for the current product.

From the Main Menu—

1. Click on the Reports button to display the Reports menu.

2. Click on the Trend Analysis button.

The report is based on the current product. Figure 7-7 shows the Consumption Trend Analysis form, which is displayed after the report is created. Use this form to create analysis reports for other products.
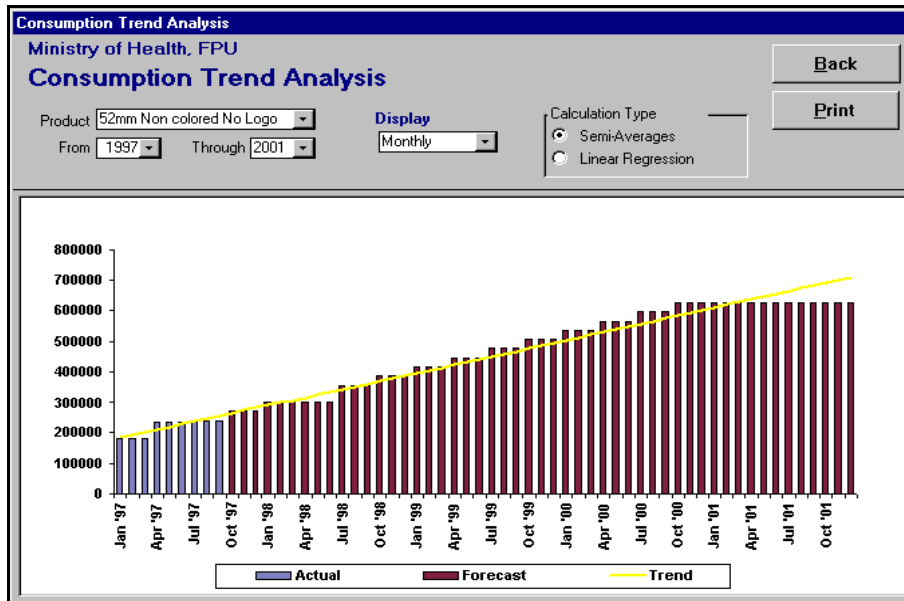
Figure 7-7 – Trend Analysis form

Printing the Trend Analysis Report

You can print the Trend Analysis report.

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

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

3. Click on the close icon ⬚ to return to the Consumption Trend Analysis form.

4. Click on the Back button to return to the Reports menu.

Creating a Trend Analysis Report for a different Product

You can create a trend analysis report for a different product by selecting the necessary data from the pull-down menus on the Consumption Trend Analysis form.

> 📄 Each time you select from the Consumption Trend Analysis form, PipeLine redraws the Trend graph and recalculates the report based on your selection.

1. Click on the arrow next to the Product field, select a product from the pull-down menu, and click the left mouse button.

2. Click on the arrow next to the From field, select the starting year of the report period from the pull-down menu, and click the left mouse button.

3. Click on the arrow next to the Through field, select the last year of the report period from the pull-down menu, and click the left mouse button.

4. Click on the arrow next to the Display Results field, select "Monthly" to display the data by month or "Quarterly" to display the data by quarter, and click the left mouse button.

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

                                    OR

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

Printing the Trend Analysis Report

You can print the new trend analysis report.

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

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

3. Click on the close icon to return to the Consumption Trend Analysis form.

4. Click on the Back button to return to the Reports menu.

The Contraceptive Procurement Table (CPT) Report

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

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

Creating the CPT Report for the Current Product

You can create a CPT report for the current product.

From the Main Menu—

1. Click on the Reports button to display the Reports menu.

2. Click on the Contraceptive Procurement Table (CPT) button.

The report is generated for the current product and year, or the following year if the current date is after April. The default period is five years, which includes the current year, previous two years (historical), and following two years (forecast). Figure 7-8 shows the CPT Report form. Use this form to create a CPT report for other products.

Figure 7-8 – CPT Report form
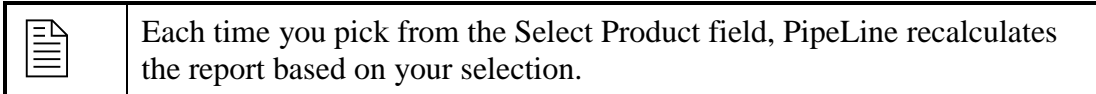
Printing the CPT Report

You can print the new CPT report.

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

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

3. Click on the close icon to return to the CPT Report form.

4. Click on the Back button to return to the Reports menu.

Creating a CPT Report for Selected Data

You can create a report for selected data by making selections from the pull-down menus on the CPT Report form.

> Each time you pick from the Select Product field, PipeLine recalculates the report based on your selection.

1. Click on the arrow next to the Select Product field, select a supplier from the pull-down menu, and click the left mouse button.

The At End of Year field (under Desired Months of Stock) lets you determine how much stock you would like to have on hand at year's end.

2. Click on the arrow next to the At End of Year field, select the desired months of stock form the pull-down menu, and click the left mouse button.

3. Click on the arrow next to the For Year field, select the current CPT year from the pull-down menu, and click the left mouse button.

Printing the CPT Report

You can print the new CPT report.

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

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

3. Click on the close icon to return to the CPT Report form.

4. Click on the Back button to return to the Reports menu.

Shipment Costs Reports

The shipment costs reports calculate the cost of products and freight for selected shipments. These reports are found under the Shipment Costs Menu of the Reports Menu.

Shipment Costs by Supplier

The Shipment Costs by Supplier groups shipments and subtotal costs by supplier. This is useful if you have products with multiple suppliers but you want to look at costs associated with individual suppliers.

Use this report when reviewing shipment information with suppliers, and estimating costs and budgeting.

Shipment Costs by Product

The Shipment Costs by Product report groups shipments by product/method, regardless of supplier. This is useful if you have products with multiple suppliers but want to see costs associated with individual products.

Use this report to review shipments input to PipeLine, check their expected receipt dates, quantities, status, etc.

Annual Shipment Cost

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

Use this report in discussions with suppliers to help assess the annual costs of supplying your program. If you procure your own commodities, you can use this report for budgeting.

Shipment Order

The Shipment Order report groups shipments by supplier and product. This is useful if you have products with multiple suppliers but want to see costs associated with a selected order status.

Use this report to provide a list for donors that can serve as an order for new shipments and confirm information on the donors' previous shipments.

Creating Shipment Costs Report for the Current Supplier

You can create a shipment cost report for the current supplier.

From the Main Menu—

1. Click on the Reports button to display the Reports menu.

2. Click on the Shipment Reports button to display the Shipment Reports menu.

3. Click on the Shipment Costs by Supplier button.

PipeLine displays shipments and their freight and commodity costs. Figure 7-9 shows the Shipment Costs by Supplier form, which is displayed after the report is created. Use this form to create shipment cost reports for other suppliers.

Supplier	Product	Receive Date	ID	Quantity	Status	Cost	Freight	Note
DFID	52mm Non colored No	02/15/1999		2,000,000	Received			
DFID	Depo-provera	06/03/2000		680,000	Shipped			
DFID	Depo-provera	04/22/2001		950,000	Planned			
DFID	Depo-provera	09/01/2001	97	12,000	Planned	500.00	50.00	
DFID	52mm Non colored No	11/10/2001		7,900,000	Planned			
UNFPA	Depo-provera	01/25/1998		200,000	Received			
UNFPA	Conceptrol	10/10/1999		85,000	Received			
UNFPA	Conceptrol	04/20/2000		100,000	Shipped			
UNFPA	Conceptrol	11/02/2000		65,000	Planned			

Figure 7-9 — Shipment Costs by Supplier form

Printing the Shipment Costs by Supplier Report

You can print the Shipment Costs by Supplier report at any time.

1. Click on the Page Break Between Suppliers field to have each supplier's data print on a separate page.

2. Click on the Print button to display the report on your screen.

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

4. Click on the close icon 🚪 to return to the Shipment Costs By Supplier form.

5. Click on the Back button to return to the Shipment Reports menu.

6. Click on the Back button to return to the Reports menu.

Creating Shipment Costs Report for a Different Supplier

You can create a report for a different supplier by selecting the necessary data from the pull-down menus on the Shipment Costs by Supplier form.

1. Click on the arrow next to the Select Supplier field, select a supplier from the pull-down menu, and click the left mouse button.

2. Click on the Select Status field, select the shipment status you want, and click the left mouse button.

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

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

📄	Enter the date based on your computer's *Regional Setting*. Always enter a four-digit year (i.e., 1996, 1997, 2001).

Printing the Shipment Costs by Supplier Report

You can print the Shipment Costs by Supplier report at any time.

1. Click on the Page Break Between Suppliers field to have each supplier's data print on a separate page.

2. Click on the Print button to display the report on your screen.

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

4. Click on the close icon ▯◄ to return to the Shipment Costs by Supplier form.

5. Click on the Back button to return to the Shipment Reports menu.

6. Click on the Back button to return to the Reports menu.

Creating Shipment Costs Report for the Current Product

You can create a shipment cost report for the current product.

From the Main Menu—

1. Click on the Reports button to display the Reports menu.

2. Click on the Shipment Reports button to display the Shipment Reports menu.

3. Click on the Shipment Costs by Product button.

PipeLine displays shipments and their freight and commodity costs. Figure 7-10 shows the Shipment Costs by Product form, which is displayed after the report is created. Use this form to create shipment cost reports for other products.

Figure 7-10 — Shipment Costs by Product form

Printing the Shipment Costs by Product Report

You can print the Shipment Costs by Product report at any time.

1. Click on the Page Break Between Methods field to have each method's data print on a separate page.

2. Click on the Print button to display the report on your screen.

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

4. Click on the close icon ▯◆ to return to the Shipment Costs by Product form.

5. Click on the Back button to return to the Shipment Reports menu.

6. Click on the Back button to return to the Reports menu.

Creating Shipment Costs Report for a Different Product

You can create a report for a different product by selecting the necessary data from the pull-down menus on the Shipment Costs by Product form.

1. Click on the arrow next to the Select Product field, select a supplier from the pull-down menu, and click the left mouse button.

2. Click on the Select Status field, select the shipment status you want, and click the left mouse button.

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

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

> Enter the date based on your computer's *Regional Setting*.
>
> Always enter a four-digit year (i.e., 1996, 1997, 2001).

Printing the Shipment Costs by Product Report

You can print the Shipment Costs by Product report at any time.

1. Click on the Page Break Between Methods field to have each method's data print on a separate page.

2. Click on the Print button to display the report on your screen.

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

4. Click on the close icon ⬜ to return to the Shipment Costs by Product form.

5. Click on the Back button to return to the Shipment Reports menu.

6. Click on the Back button to return to the Reports menu.

Creating an Annual Shipment Costs Report

You can create an annual costs report for all suppliers, products and shipment statuses.

From the Main Menu—

1. Click on the Reports button to display the Reports menu.

2. Click on the Shipment Reports button to display the Shipment Reports menu.

3. Click on the Annual Costs button.

PipeLine displays shipments with freight and commodity costs for the products in your program. Figure 7-11 shows the Annual Shipment Costs form. Use this form to create additional annual cost reports.

Figure 7-11 — Annual Shipment Costs form

Printing the Annual Shipment Costs Report

You can print the Annual Shipment Costs report at any time.

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

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

3. Click on the close icon 🚪 to return to the Annual Shipment Costs form.

4. Click on the Back button to return to the Shipment Reports menu.

5. Click on the Back button to return to the Reports menu.

Creating Annual Shipment Costs Report for Selected Data

You can create a report for selected data by making selections from the pull-down menus on the Annual Shipment Costs form.

1. Click on the arrow next to the Select Suppliers field, select a supplier from the pull-down menu, and click the left mouse button.

2. Click on the arrow next to the Select Product field, select a supplier from the pull-down menu, and click the left mouse button.

3. Click on the Select Status field, select the shipment status you want, and click the left mouse button.

4. Click on the arrow next to the From field, select the starting year of the report period from the pull-down menu, and click the left mouse button.

5. Click on the arrow next to the Through field, select the last year of the report period from the pull-down menu, and click the left mouse button.

Printing the Annual Shipment Costs Report

You can print the Annual Shipment Costs report at any time.

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

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

3. Click on the close icon to return to the Annual Shipment Costs form.

4. Click on the Back button to return to the Shipment Reports menu.

5. Click on the Back button to return to the Reports menu.

Creating Shipment Order Report for the Current Supplier

You can create a shipment order report for the current supplier.

From the Main Menu—

1. Click on the Reports button to display the Reports menu.

2. Click on the Shipment Reports button to display the Shipment Reports menu.

3. Click on the Shipment Order option.

PipeLine displays orders and their associated data. Figure 7-9 shows the Shipment Order Report form. Use this form to create shipment order reports for other suppliers.

Figure 7-12 — Shipment Order Report form

Printing the Shipment Order Report

You can print the Shipment Order report at any time.

1. Click on the Page Break Between Status field to have each shipment status print on a separate page.

2. Click on the Print button to display the report on your screen.

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

4. Click on the close icon 🚪 to return to the Shipment Order Report form.

5. Click on the Back button to return to the Shipment Reports menu.

6. Click on the Back button to return to the Reports menu.

Creating Shipment Order Report for Selected Data

You can create a report for selected data by making selections from the pull-down menus on the Shipment Order Report form.

1. Click on the arrow next to the Select Supplier field, select a supplier from the pull-down menu, and click the left mouse button.

2. Click on the Select Status field, select the shipment status you want, and click the left mouse button.

3. Click on the From field and type the starting date of the report period.

4. Click on the Through field and type the ending date of the report period.

▤	Enter the date based on your computer's *Regional Setting*. Always enter a four-digit year (i.e., 1996, 1997, 2001).

Printing the Shipment Order Report

You can print the Shipment Order report at any time.

1. Click on the Page Break Between Status field to have each shipment status print on a separate page.

2. Click on the Print button to display the report on your screen.

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

4. Click on the close icon 🚪 to return to the Shipment Order Report form.

5. Click on the Back button to return to the Shipment Reports menu.

6. Click on the Back button to return to the Reports menu.

PIPELINE SUMMARY

Introduction

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

Shipments by Supplier Report

This report is similar to the Shipment Costs by Supplier report (found under the Shipment Reports menu in PipeLine). It displays shipment costs, including product and freight costs, for selected supplier/status of selected, aggregated programs.

Shipment Order Report

This report is similar to the Shipment Order report (found under the Shipment Reports menu in PipeLine). It displays quantities and cost of orders for a selected supplier/status of selected, aggregated programs.

Consumption Graph/Export

This graph is similar to the Consumption graph (found under the Graphs Menu in PipeLine). It produces a monthly or quarterly bar chart showing actual and forecast consumption by product or method of selected, aggregated programs. This option also enables you to export the aggregated data in a variety of formats.

Couple Years of Protection (CYP) Graph

This graph is similar to the Couples Years of Protection (CYP) graph (found under the Graphs menu in PipeLine). It produces a monthly or quarterly bar chart showing actual and forecast (CYP) by product or method of selected, aggregated programs.

Access the PipeLine Summary module.

From the Main Menu—

1. Click on the PipeLine Summary button to display the PipeLine Summary menu.

PipeLine displays the PipeLine Summary menu.

Selecting Programs

The Select Programs option lets you select the programs with data you want to aggregate. You must include programs for aggregation before you can create reports or graphs.

From the PipeLine Summary Menu—

1. Click on the Select Programs button.

PipeLine displays the Select Program form (Figure 8-1). This sample shows that no programs were added for selection. Programs must be added before they can be selected.
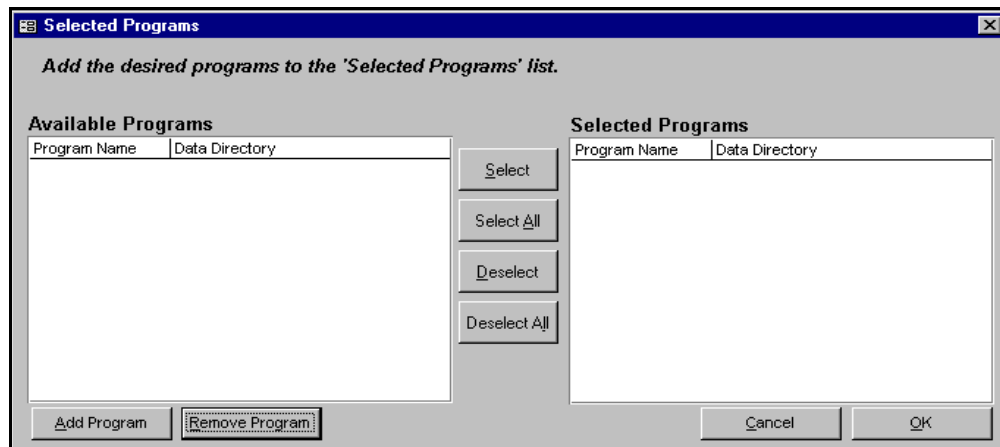

Figure 8-1 — Sample Select Program form

Adding Programs

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

1. Click on the Add Programs button.

PipeLine displays the Load Database window shown in Figure 8-2. Ideally, the programs you want will be in your default directory. If they are not (because the program data was backed up to another location), you will have to access the stored data. After you locate the data, add it as follows:

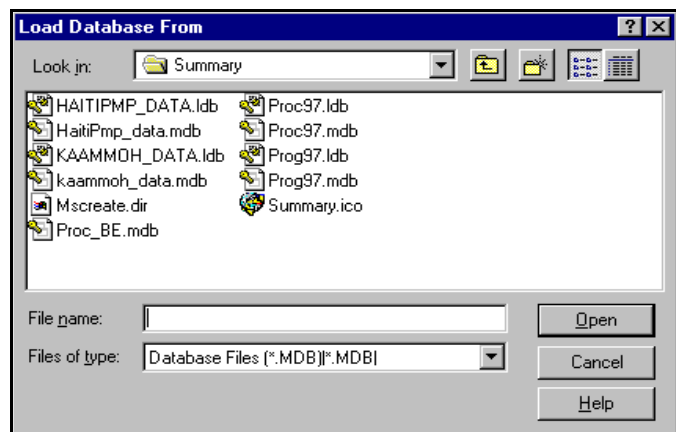1. Click on the program you want to add.

Figure 8-2 — Load Database window

2. Click on the Open button.

PipeLine displays the form in Figure 8-3 so you can associate an ID with the program.

2. Type the program ID and press <Enter>.

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

Figure 8-3 — Name Program form

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

After you add the programs, you must select the ones you want to aggregate for reporting purposes. This can be done in two ways:

> ### Method 1 — Selecting all Programs
> 1. Click on the Select all button to move the programs in the Available Programs window to the Selected Programs window.
>
> ### Method 2 — Selecting Specific Programs
> 1. Click on the program you need, and click on the Select button to move it from the Available Programs window to the Selected Program window.
>
> 2. Repeat as needed.

After you select the programs you need—

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

> If you make changes to a program's data in PipeLine, you must reload the program into PipeLine Summary to ensure that the changes are reflected in the summary reports and graphs.

Creating Reports and Graphs

You can create PipeLine Summary reports as explained below.

Shipments by Supplier Report

You can create a Shipment by Supplier report.

From the PipeLine Summary Menu—

1. Click on the Shipments by Supplier Report button.

PipeLine displays shipments and their associated costs. Figure 8-4 shows the PipeLine Summary Shipment Costs by Supplier form, which is displayed after the report is created. Use this form to create shipment costs reports for other suppliers.

Figure 8-4 — PipeLine Summary Shipment Costs by Supplier form

Printing the Summary Shipment Costs by Supplier Report

You can print the Summary Shipment Costs by Supplier report at any time.

1. Click on the Page Break Between Suppliers field to have each supplier's data print on a separate page.

2. Click on the Print button to display the report on your screen.

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

4. Click on the close icon to return to the Shipment Costs by Supplier form.

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

See *Creating Shipment Cost Report for a Different Supplier* (Section 7) for information on creating the report for selected data.

Shipment Order Report

You can create a Shipment Order report.

From the PipeLine Summary Menu—

1. Click on the Shipment Order Report button.

PipeLine displays orders and their associated data for the selected programs. Figure 8-4 shows the PipeLine Summary Shipment Order Report form. Use this form to create shipment order reports for other suppliers.

Figure 8-5 — PipeLine Summary Shipment Order Report form

Printing the Summary Shipment Order Report

You can print the Summary Shipment Order report at any time.

1. Click on the Page Break Between Status field to have each shipment status print on a separate page.

2. Click on the Print button to display the report on your screen.

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

4. Click on the close icon to return to the Shipment Order Report form.

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

See *Creating Shipment Order Report for Selected Data* (Section 7) for information on creating the report for selected data.

Consumption Graph/Export

You can create a Consumption graph for the current product.

From the PipeLine Summary Menu—

1. Click on the Consumption Graph/Export button.

The graph is based on the last product/method and period updated or displayed. Figure 8-6 shows the PipeLine Summary Consumption Graph form, which is displayed after the graph is created. Use this form to create graphs for other products/methods.
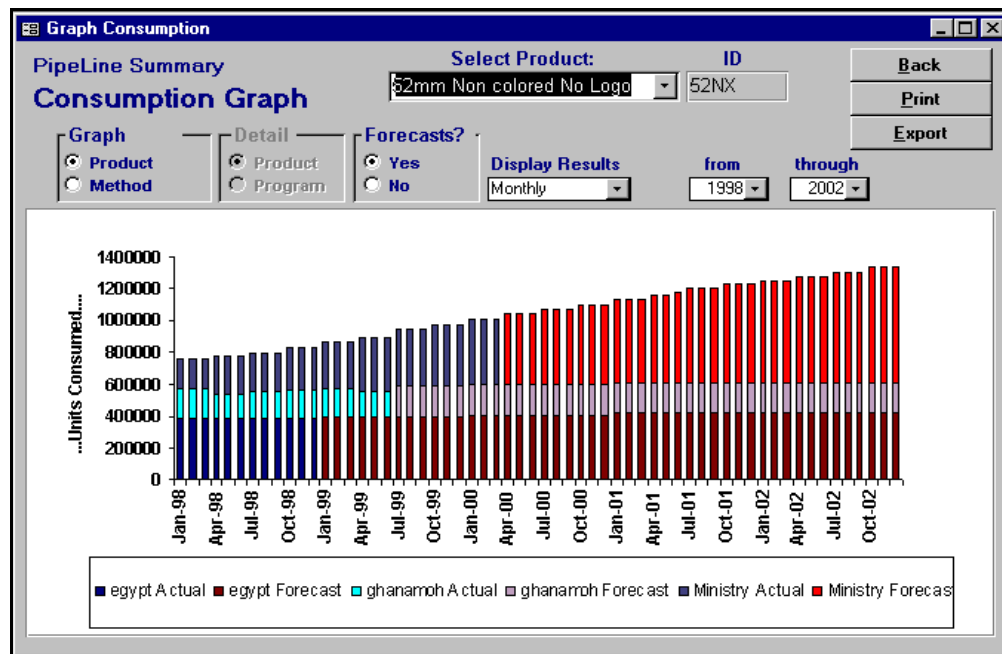

Figure 8-6 – PipeLine Summary Consumption Graph form

Printing the Summary Consumption Graph

You can print the PipeLine Summary Consumption Graph at any time.

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

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

3. Click on the close icon 🚪 to return to the Consumption Graph form.

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

Exporting Summary Consumption Graph Data

Summary Consumption graph data can be exported.

From the PipeLine Summary Menu—

1. Click on the Consumption Graph/Export button.

2. Create a Consumption graph for a selected product/method.

3. Click on the Export button.

PipeLine displays the Output window in Figure 8-7.

4. Click on the file type for the export data.

In the example in Figure 8-7, the Microsoft Excel file format was selected.

5. Click on the OK button.
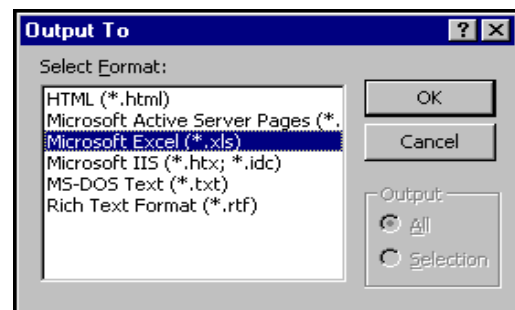
Figure 8-7 — Output window 1

PipeLine opens another Output window (Figure 8-8) so you can name and save the export file.

The default export file name is shown in the File Name field.

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

OR
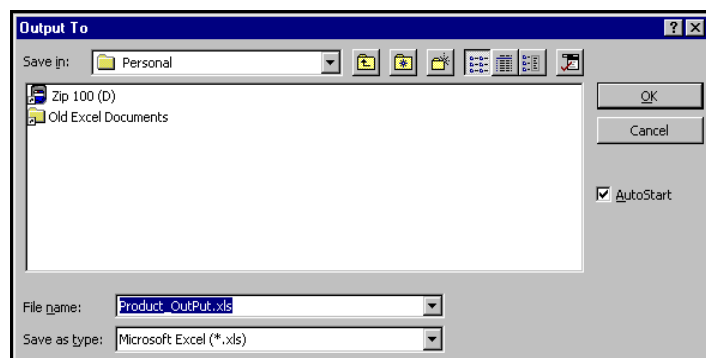
Figure 8-8 — Output window 2

5. Click on the File Name field, and type the new export file name.

6. Click on the AutoStart field to remove the check mark $(\checkmark)$ so the program associated with the selected file type does not open.

7. Click on the OK button.

PipeLine exports and saves the Consumption graph.

8. Click on the Back button to return to the PiepLine Summary menu.

See *Creating a Graph for a Different Product/Method* (Section 6) for information on creating the graph for selected data.

Couple Years of Protection (CYP) Graph

You can create a CYP graph.

From the PipeLine Summary Menu—

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

The number of CYPs is calculated by multiplying products/methods dispensed by the appropriate conversion factor. Figure 8-9 shows the PipeLine Summary CYP graph form. Use this form to create graphs for a selected products or methods.

Figure 8-9 — PipeLine Summary CYP graph form

2. Click on the Product field (under "Graph") to select a product.

<div align="center">*OR*</div>

3.   Click on the Method field (under "Graph") to select a method.

4. Click on the Products/Methods (under "Select") you want included on the graph.

5. Click on the arrow next to the Display Results field, select "Monthly" to display the data by month or "Quarterly" to display the data by quarter, and click the left mouse button.

6. Click on the arrow next to the From field, select the starting year of the report period from the pull-don menu, and click the left mouse button.

7. Click on the arrow next to the Through field, select the last year of the report period from the pull-down menu, and click the left mouse button.

Displaying the Summary CYP Graph

You can use the Display Graph tab to preview the Summary CYP graph before you print it.

1. Click on the Display Graph tab.

The CYP graph is created and displayed (Figure 8-10).
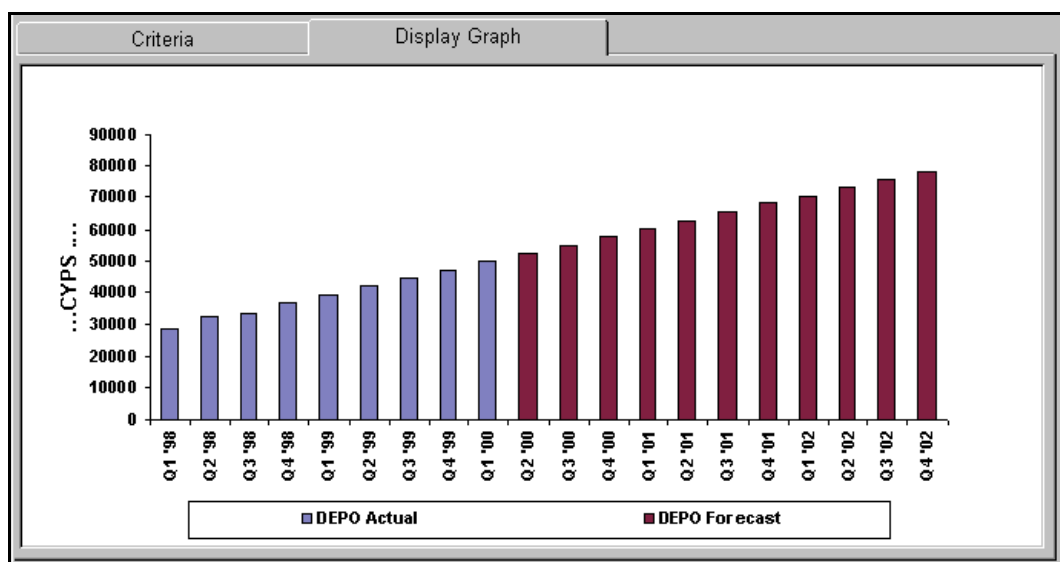
Figure 8-10 — Sample CYP Graph display

Printing the Summary CYP Graph

You can print the Summary CYP graph at any time.

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

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

3. Click on the close icon to return to the CYP graph form.

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

See *Exporting the CYP Graph* (Section 6) for information on exporting the graph.

PIPELINE TERMS AND DEFINITIONS

INTRODUCTION

The following terms are used in the Pipeline Monitoring and Procurement Planning System:

PipeLine Term	Definition
Above Maximum	Stock level is higher than required for the maximum months desired for the program.
Action Required	A needed procurement action based on lead times and shipment status.
Active Product	A product currently in use. Products not marked "active" are not included in multi-product reports or actively monitored by PipeLine.
Adjustment Date	Date an inventory adjustment occurred or is projected to occur.
Backup	Saves PipeLine program data files to a specified location.
Beginning Balance	Stock quantities equal to ending balance for previous period.
Below Minimum	Stock level is lower than required for minimum months desired for the program.
Case Size	Minimum shipping unit quantity.
Code	Identification code used by the database but usually not found in the reports.
Confirm Shipment Ordered	Indicates a planned shipment should be ordered by action date.
Confirm Shipment Dispatched	Indicates an ordered shipment should be shipped by action date.

PipeLine Term	Definition
Confirm Shipment Received	Indicates a shipped shipment should have been received by action date.
Consumption, Actual	Product quantity estimated or known to have been dispensed to clients for any number of months.
Consumption, Forecast	Product quantity forecasted or projected to be dispensed to clients for any number of months.
CPT	Contraceptive Procurement Tables. USAID's format for computation of calendar year quantities required and generation of data for USAID's planning requirements.
CYP	Couple Years of Protection. The percentage used to calculate the amount of pregnancy protection afforded by a contraceptive product or method for one year.
Data Source	The information source for each primary record.
Date of Next Action	The date the procurement status of a shipment should change (e.g., from Ordered to Shipped), based on lead times.
Date of Problem	The date an indicated problem is projected to, or did, occur.
Default Supplier	A product's normal supplier. The default supplier is the first entry in the Supplier pull-down menu on the Shipments update screen.
Desired Months of Stock at End of Year (DEOYS)	Used by the CPT Report to calculate requirements based on the amount, in months of stock, the product should have at the end of the year.
Ending Balance	A beginning period's balance computed by subtracting consumption, adding shipments received (if any), and adding or subtracting inventory adjustments for the period.
Inventory Adjustment	An event other than Consumption or Shipments that changes the program's inventory balance. This is typically a loss (e.g., expiry, damage, theft) or transfer (out of or into the program, such as a loan from or to another program).

PipeLine Term	Definition
Inventory Date	Date the inventory count was made.
Inventory Count	Physical inventory quantity record that creates an adjustment to recalculate ending balance.
Lead Time, Supplier	Months needed for procurement actions entered in the Suppliers screen. The estimated dates in the Shipments screen are based on these lead times.
Lead Time, Program	Months needed for procurement actions entered in the Program screen. The procurement action dates for *needed* shipments are based on these lead times. The estimated dates in the Shipments screen are based on these lead times if supplier lead times are not entered.
Lead Time Dates, Shipment	Dates entered in the Shipments screen for order and/or ship. When a shipment's status is changed from planned to ordered or ordered to shipped, the date on which the status changed must be entered as well. These dates override estimated lead time dates for a particular shipment.
Maximum	Maximum level of stock desired by the program, including storage facilities and service delivery points, expressed as the number of months the quantity is expected to last. Exceeding this level could result in problems related to high storage costs, exceeding storage capacities, and/or loss of product due to expiry or storage conditions.
Method	A product category to group products.
Minimum	Minimum stock level desired by the program, including storage facilities, expressed as the number of months the quantity is expected to last.
Needed to Reach Max	Stock quantity needed in a month to bring the ending balance up to the maximum.
Needed	Quantity needed to reach maximum in a month for which the ending balance is projected to fall below minimum.

PipeLine Term	**Definition**
Order to Ship	Estimated number of months of lead time expected from the time a shipment is ordered to when it is shipped.
Ordered	A shipment for which funds have been allocated, the product has been identified as available, and the order has been placed.
Plan Shipment	Indicates the ending balance for the month is projected to fall below minimum. Thus, the quantity needed to reach the maximum should arrive as a shipment during the month.
Plan to Order	Estimated number of months of lead time expected from the time a shipment is planned to when it is ordered.
Planned	A shipment whose quantity, supplier, and desired receipt date have been determined and entered into PipeLine.
Product	Commodity to be monitored and procured.
Program	Refers to the organization that owns/manages the logistics system and dispenses the products to clients, such as the Ministry of Health or the Family Planning Association.
Received	A shipment that has been received by the program and made available for consumption.
Ship to Receive	Estimated number of months expected from the time a shipment is shipped to the time the program receives it.
Shipped	A shipment that has been dispatched to the program but not yet received.
Shortfall/Surplus	Ending balance quantity that is below the minimum or above the maximum.
Stockout	Ending balance is zero.
Stock in Months	Ending balance divided by the average monthly consumption. Average monthly consumption is calculated by adding the month's consumption to the following two months of consumption. The resulting sum is and dividing by three.

PipeLine Term	**Definition**
Supplier	Donor or other source from whom the program receives a product.
Surplus: Change?	Indicates that receipt of this shipment will cause the ending balance for the month to rise above maximum.
Trend Analysis	Report showing consumption data in PipeLine and the trend of the actual consumption data.
Value, Product	Per unit value of a product.