COMMODITY TRACKING TOOL

User Manual

Version 1.0

Created on:

24 August 2005

Last Updated on:

4 November 2005

Revisions

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1. INTRODUCTION

The purpose of this document is to describe how the *HIV/AIDS Commodity Tracking Tool* functions and provides for the necessary instructions which the user should follow to ensure successful work with the application. Use of this document and compliance with the standards specified herein is mandatory for anyone working with the above-mentioned application.

The document consists of the following sections:

Section 2 – provides overview of the *HIV/AIDS Commodity Tracking Tool* application.
Section 3 – gives instructions on how the user can log into the *HIV/AIDS Commodity Tracking Tool* application.
Section 4 – gives a description of the *List* module of the application and provides necessary instructions on the action which the user can take in the module.
Section 5 - describes the *Chart* module of the application and provides necessary instructions on the action which the user can take in the module.
Section 6 - describes the *Map* module of the application and provides necessary instructions on the action which the user can take in the module.
Section 7 - describes the *Report* module of the application and provides necessary instructions on the action which the user can take in the module.
Section 8 - describes the *Dashboard* module of the application and provides necessary instructions on the action which the user can take in the module.
Section 9 – describes the filtering opportunities that the system provides.
Section 10 – provides instructions on how to save the reports created.
Section 11 – gives instructions on how to organize the reports created.
Section 12 – describes the steps that are necessary to take when exporting the reports created.
Section 13 - describes the steps that are necessary to take when printing the reports created.

2. OVERVIEW

The *HIV/AIDS Commodity Tracking Tool (CTT)* application is an automated information management system which is designed to track and report pertinent information on various types of commodities throughout the delivery process from initial request submitted by a country up to the fulfillment and final shipment for the corresponding order. Analogously, the system tracks and reports on unsolicited donations.

The *HIV/AIDS Commodities Tracking Tool (CTT)* was developed in response to the numerous donor programs that are providing HIV/AIDS pharmaceuticals and other commodities to developing countries. It is critical that this dynamic information base be effectively catalogued, monitored, and shared, so that policy makers and program managers in donor organizations, recipient countries and institutions, and international support groups can make the most appropriate decisions and policies related to program funding and implementation.

The purpose of the tool is to track funds requested and expended on HIV/AIDS-related pharmaceuticals and other commodities as well as the quantities of pharmaceuticals arriving in countries (including donated products) in support of global HIV/AIDS initiatives. The CTT currently tracks information on the Rational Pharmaceutical Management (RPM) Plus Program’s HIV/AIDS commodity procurement initiatives funded by the U.S. President’s Emergency Plan for AIDS Relief, monitoring the flow of medicines into selected Emergency Plan target countries.

Development of the *HIV/AIDS Commodities Tracking Tool* is a Management Sciences for Health Center for Pharmaceutical Management activity funded by the Bill & Melinda Gates Foundation (for software licensing and development) and the U.S. Agency for International Development (for data entry/maintenance) through the SEAM and RPM Plus Programs, respectively.

3. LOGGING INTO THE COMMODITY TRACKING TOOL

The starting screen of the *HIV/AIDS Commodity Tracking Tool* application is the *Login Screen*. The application requires the user to enter a valid username and password and then to submit them. The section below provides for the necessary instructions on how the user can log into the *HIV/AIDS Commodity Tracking Tool* application.

In order to log into the application, the user should follow the steps described below.

Steps:

1. Provide the username and password in the appropriate fields on the *Login Screen* shown in Figure 1 below.
2. Click the **Login** button. **Note:** The password is case sensitive.

Figure 1: HIV/AIDS Commodity Tracking Tool Application Login Screen

A successful login directs the user to the *List* module of the *HIV/AIDS Commodity Tracking Tool* application.

4. LIST MODULE

In the *List* module of the *HIV/AIDS Commodity Tracking Tool* application, the user can create and execute ad-hoc queries on projects data, and acquire results in the form of a list. The *List* module is shown in Figure 2 below.

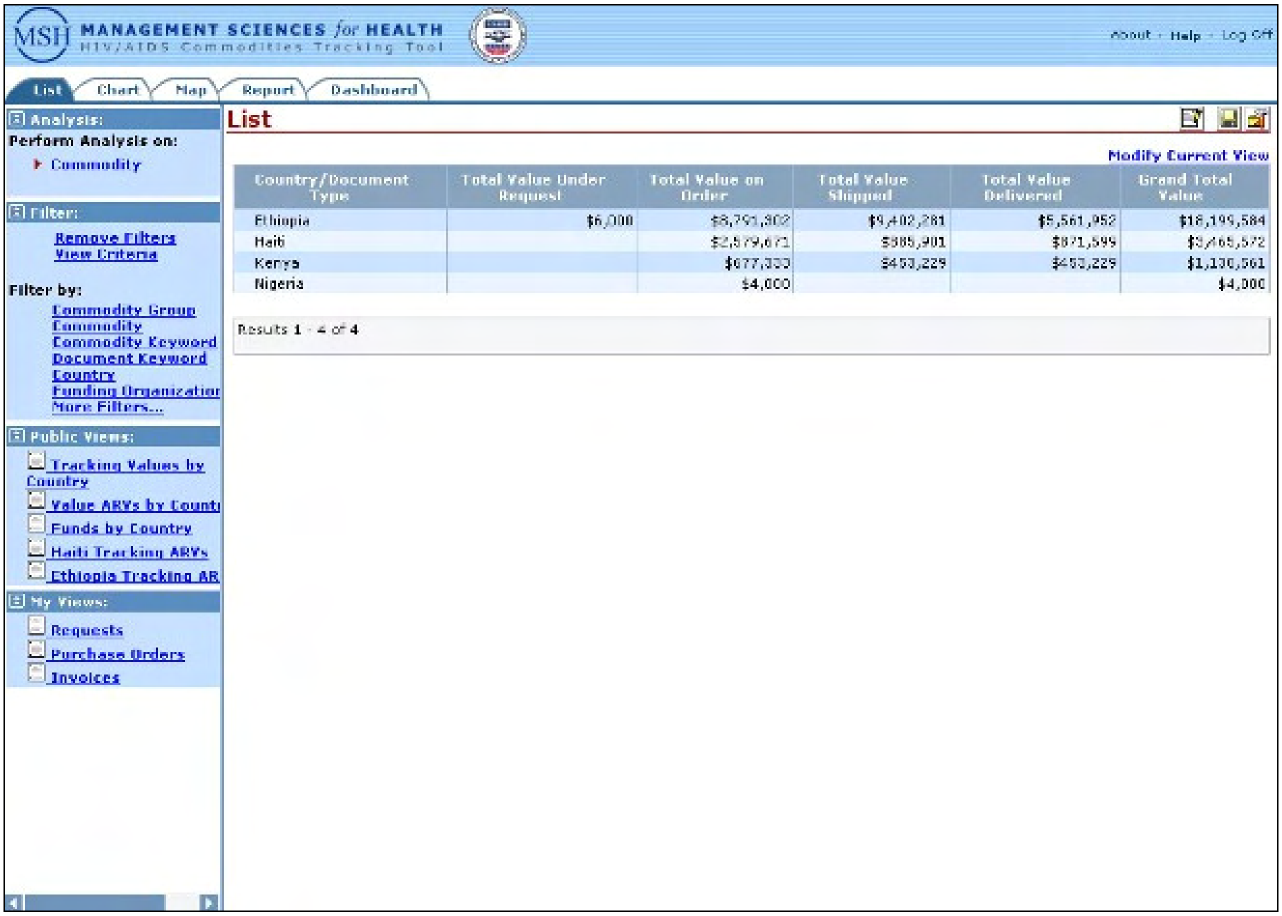


Figure 2: CTT Application List Module

In the left frame of this screen, the user is able to view the following sections:

- **Analysis**
  Perform Analysis on:
  This option allows the user to define the object of the analysis. By defining an appropriate object, the user specifies to the application which data the following ad-hoc queries will be run on. If the analysis object is changed, the system will reset the list of categories and measures on the user's screen accordingly. In the current design, only one option is possible:
  - ***Commodity***
- **Filtering**
  This section contains the list of categories/hierarchies by which the user may define filters for ad-hoc queries. For user's convenience, the most frequently used filtering categories are constantly present on the screen, whereas others become available when the user clicks on the *More Filters* hyperlink.

- **Public Views** and **My Views**
  This section contains a number of predefined list reports that are stored in the database. Two options are available in this section:
  - ***Public Views:***
    This section contains the list reports available to all users of the application.
  - ***My Views:***
    This section contains the list reports available to the current user only.

4.1 Accessing the *List* Module

As it has been stated above, the project data can be presented in a form of a list. A list consists of at least one group and one column, but the actual quantity of groups and columns is defined by administrator's choice of the view. Please refer to the ***Modifying the Current View*** of the present document for more details on how to define more groups / columns for the list.

In order to access the *List* module of the system, the user should follow the steps described below.

Steps:

1. Click on the **List** tab. The administrator will be navigated to the *List* module.
2. In this module, the administrator can view the data organized into a view according to the selected groupings and columns, modify the currently used list, save it as a pre-defined report, include it under a definite group, print it, etc.

4.2 Expanding the List Item

It is possible to expand the list item level to view the information of the sub-level(s). In order to expand the list item level, the user should click on the "+" sign next to the name of the list item s/he would like to expand. This will expand the list item group level displaying the first sub-level as shown in Figure 3 below. This can further be expanded unless there are no more sub-levels to be displayed.

Note: It should be mentioned that the user can expand one group level at a time. In the event that the user wants to expand the group level of another list item, the previously expanded group level will collapse.

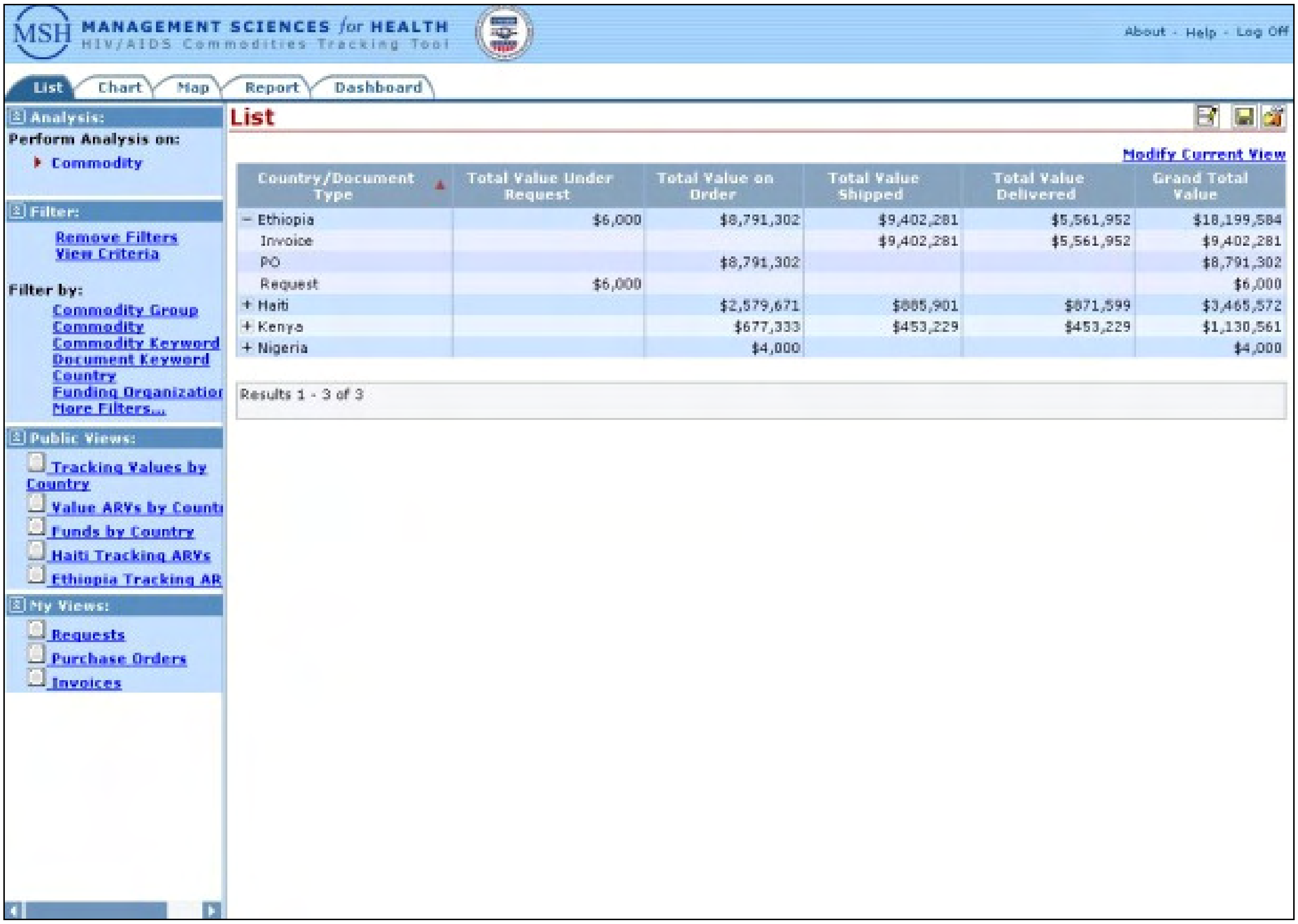


Figure 3: Expanding the List Item Level

4.3 Browsing among List Items

The user can browse among the list items by clicking on the number link of the page s/he would like to navigate to. Also, the user can make use the **Previous** and **Next** buttons to move to the page of his/her choice.

4.4 Instructions for Modifying the Current View

It is possible to modify the list that is currently displayed in the *List* module. The user can add new groupings to it or remove the selected ones, (un-) select columns, re-order them, etc. The steps described below provide for the necessary instructions for modifying the current view.

Steps:

1. Click on the Modify Current View link at the top right corner of the *List* screen. A *Modify Current View* window shown in Figure 5 will appear presenting the administrator with the groupings/columns selected and available for the list view.
2. In the *Groupings* section, add / re-order / remove groups.

3. In the *Columns* section, add / re-order / remove columns.
4. Set the view as default, if necessary.
5. After finishing making changes in the view, click the **Ok** button for the changes to take effect. Or, click the **Cancel** button to discard the changes made.

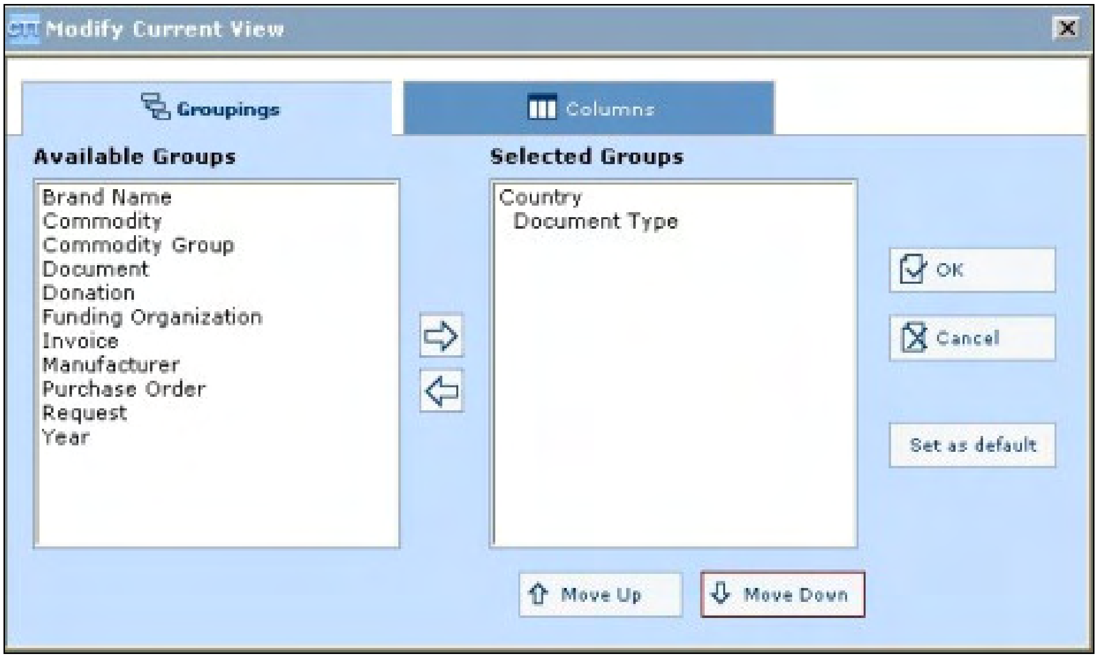


Figure 4: Modifying the Current View

4.4.1 Adding List Groups / Columns

In order to add a group / column to the list, the user should follow the steps described below.

<u>Steps:</u>

1. In the *Available Groups / Columns* panel, select the group / column to be added to the list. **Note:** It is possible to select several groups / columns by means of the **Shift** or **Ctrl** keyboard buttons.
2. Click the  **(Select)** button. The selected group(s) / column(s) will appear in the *Selected Groups / Columns* panel.

4.4.2 Re-ordering Groups / Columns

In order to re-order the selected groups / columns, the user should follow the steps described below.

<u>Steps:</u>

1. Select the group / column that needs to be re-ordered in the *Selected Groups / Columns* panel.
2. Click the **Move Up / Move Down** button.

4.4.3 Removing Groups / Columns

In order to remove the selected groups / columns from the list, the user should follow the steps described below.

Steps:

1. In the *Selected Groups / Columns* panel, select the group / column that needs to be removed from the list.
2. Click the  **(Unselect)** button. The selected group(s) / column(s) will be removed from the *Selected Groups / Columns* panel.

4.4.4 Setting a View as Default

After making changes in the view currently displayed in the *List* module, the user can set the newly created view as default. This means that the new view will be displayed when the user accesses the *List* module.

In order to set a view as default, the user should follow the steps described below.

Steps:

1. Make the necessary changes in the current view as described in the sections above.
2. After finishing, click the **Set as Default** button in the *Modify Current View* window.

Example View

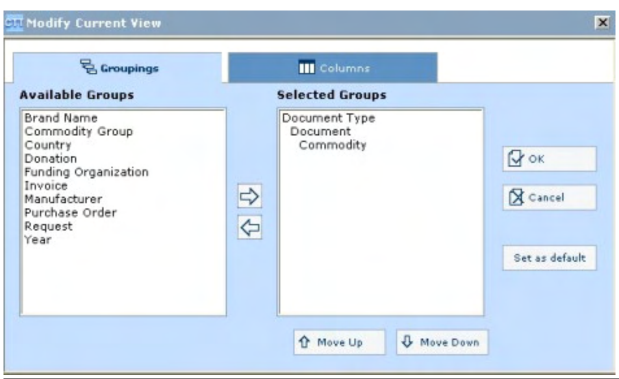


Figure 5: Defining List View Groupings

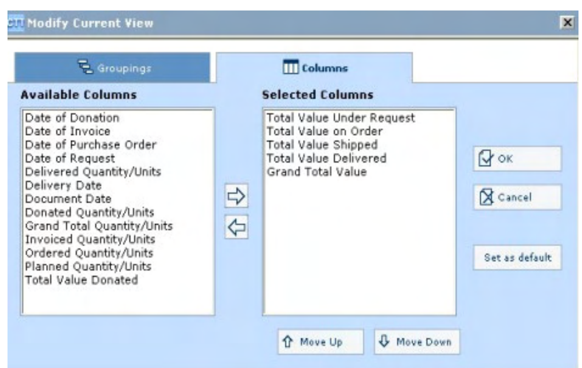


Figure 6: Defining List View Columns

In the event the user indicates:

- Country / Request / Commodity hierarchy as a grouping as shown in Figure 5; and,
- Requested Quantity / Total Value under Request as columns as shown in Figures 6 above,

s/he will acquire a view as shown in Figure 7 below.

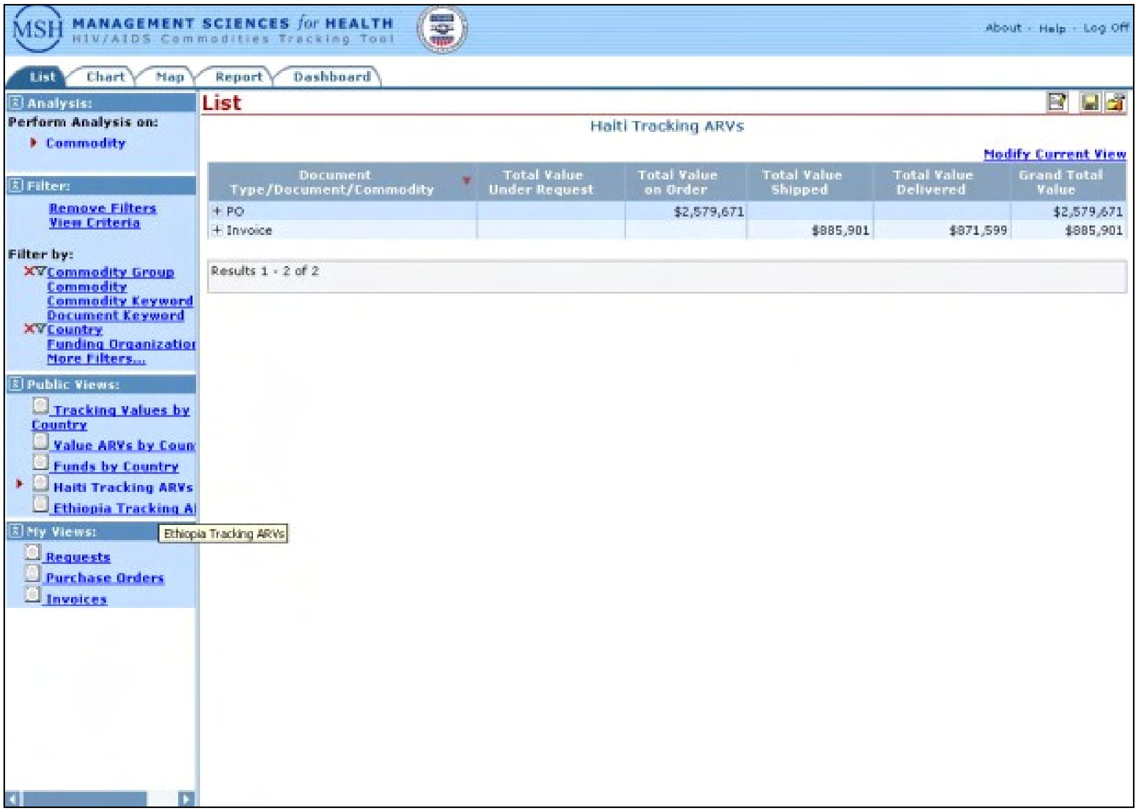


Figure 7: Example View

4.5 Viewing Grouping Details

Depending on the user's choice of the grouping in the *List* module, the user can view detailed information on the groupings, which allow such a possibility. In the current design, these groupings include requests, purchase orders, invoices, and donations. In order to view more detailed information about any of the groupings mentioned above, the user should follow the steps described below.

Steps:

1. Expand the first level group to view the groupings listed under it, if it is necessary.
2. Click on the grouping for the details to be displayed. The user will be directed to the *Details* section of the application where more detailed information about the selected grouping will be displayed.
3. Take the necessary actions (add new grouping items, edit existing ones, etc.).
4. After finishing, click the **Close** button to return to the *List* module.

4.5.1 Adding a New Grouping Item

In the *Details* section, the user can add a new grouping item. In order to add a new grouping item, the user should follow the steps described below.

Steps:

1. Click on the **New** button at the top of the *Details* screen. The user will then be directed to the *Data Entry* module of the *Commodity Tracking Tool* application. Please note that depending on your choice of the grouping (request, purchase order, invoice, and donation), the respective data entry form will open.
2. In the *Data Entry* module, fill in the information requested. **Note:** Please refer to the ***Data Entry Module*** user manual for more details on how to enter grouping item data into the application.

Note: It should be taken into account that the user can add a new grouping item from the main screen of the *List* module. In order to add a new grouping item, the user should click on the **(New)** button in the top toolbar above the screen and specify the grouping for the item to add to in the window shown in Figure 8.

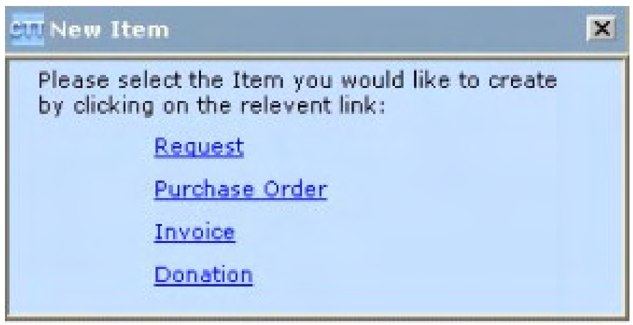


Figure 8: Adding a New Item

4.5.2 Editing an Existing Grouping Item

In the *Details* section, the user can edit an existing grouping item. In order to edit an existing grouping item, the user should follow the steps described below.

Steps:

1. Click on the **Edit** button at the top of the *Details* screen. The user will then be directed to the *Data Entry* module of the *Commodity Tracking Tool* application. Please note that depending on your choice of the grouping (request, purchase order, invoice, and donation), the respective data entry form will open.
2. In the *Data Entry* module, make the appropriate changes. **Note:** Please refer to the ***Data Entry Module*** user manual for more details on how to enter project data into the application.

4.5.3 Deleting an Existing Grouping Item

In the *Details* section, the user can delete an existing grouping item. In order to delete an existing grouping item, the user should follow the steps described below.

Steps:

1. In the *Details* sub-section, select the grouping item to be deleted.
2. Click the **Delete** button at the top of the *Details* screen. The selected grouping item will be deleted.

5. CHART MODULE

In the *Chart* module of the *Commodity Tracking Tool* application, the user can create and execute ad-hoc queries on the data stored in the system, and acquire results in the form of different charts. The *Chart* module is shown in Figure 9 below.

In the left frame of this screen, the user is able to view the following sections:

- **Analysis**
  Perform Analysis on:
  This option allows the user to define the object of the analysis. By defining an appropriate object, the user specifies to the application which data the following ad-hoc queries will be run on. If the analysis object is changed, the system will reset the list of categories and measures on the user's screen accordingly. In the current design, only one option is possible:
  - ***Commodity:***
- **Filtering**
  This section contains the list of categories/hierarchies by which the user may define filters for ad-hoc queries. For user's convenience, the most frequently used filtering categories are constantly present on the screen, whereas others become available when the user clicks on the *More Filters* hyperlink.
- **Public Charts** and **My Charts**
  This section contains a number of predefined chart reports that are stored in the database. Two options are available in this section:
  - ***Public Charts:***
    This section contains the chart reports available to all users of the application.
  - ***My Charts:***
    This section contains the chart reports available to the current user only.

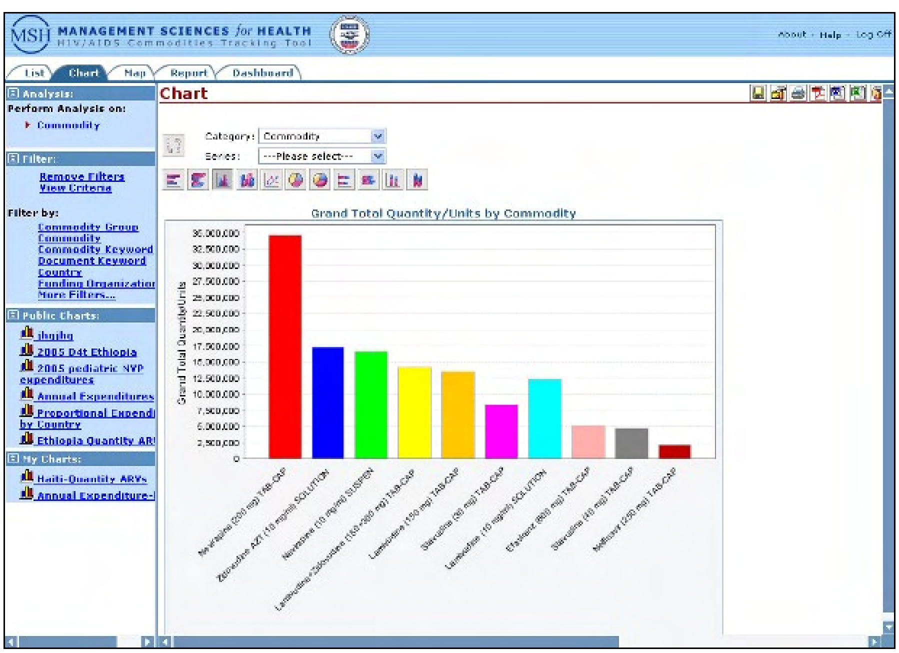


Figure 9: CTT Application Chart Module

5.1 Accessing the *Chart* Module

As it has been stated above, the system provides for the opportunity to present data in the form of different charts. In order to access the *Chart* module of the system, the user should follow the steps described below.

Steps:

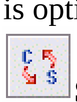
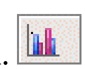
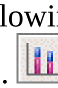
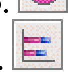
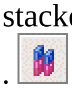
1. Click on the **Chart** tab. The user will be navigated to the *Chart* module where a predefined chart based on the *Commodity* set as the chart category, *Total Value Shipped* set as the chart value, and *Column Chart* set as chart type is displayed.
2. In this module, the user can create and display reports in the form of different charts, save them as pre-defined reports, arrange them in the desired way, print them, etc.

5.2 Instructions for Creating Chart Reports

In order to create a chart report, the user should follow the steps described below.

Steps:

1. Define one or more of the following:
   - **Category**
     Select one of the options provided in the *Category* pull down menu located at the top of the *Chart Screen*. The selected category will define one of the chart axes. **Note:** Selection of a category for the chart report is required.
   - **Series**
     Select one of the options provided in the *Series* pull down menu located at the top of the *Chart Screen*. The selected series will define the chart legend. **Note:** Selection of a series for the chart report is optional.

     Note: Clicking the  **Swap** button allows trading places of category and series selections.
   - **Value(s)**
     Select one or more of the options provided in the *Values* section.
     Note that when only the *Category* is defined, the user can select one or more *Values*. Hence the *Values* section consists of a collection of checkbox-type elements. If, however, the administrator has defined both *Categories* and *Series* prior to defining *Values*, the user can only select one *Value*. Hence the *Value* section consists of a collection of radio-button- type elements.
   - **Chart Type**
     Click on the button that represents the preferred chart type from the following: a.  - column chart; b.  - pie chart; c.  - line chart; d.  - bar chart; e.  - stacked column chart; f.  - stacked bar chart; g.  - 3D column chart; h.  - 3D pie chart; i.  - 3D bar chart; j.  - 3D stacked column chart; and, k.  - 3D stacked bar chart.

Note: In the event the administrator defines pie chart or 3D pie chart as the chart type, s/he can define only one value for that chart to be generated.

2. Click on the Please click here to see your changes in effect link for the chart to be generated.

Example Chart Report

In the event the user selects the "Commodity" as a chart Category, "Manufacturer" as a chart Series, and "Grand Total Quantity / Units" as a value to be shown on the chart, and clicks on the **3D column chart** button to specify the chart type, s/he will acquire the chart presented in Figure 10 below.

Figure 10: Example Chart Report

5.3 Setting Chart Options

In the *Chart* module, the user can set the chart options, i.e. indicate the number of items to be displayed on the chart and define whether the numeric values should be displayed in thousands, millions, etc.

In order to set the chart options, the user should follow the steps described below.

Steps:

1. Click the **(Set Chart Options)** button in the top toolbars. An *Options* window shown in Figure 11 will appear.
2. Indicate the number of items to be displayed on the chart by selecting the appropriate value from the relevant pull-down list.

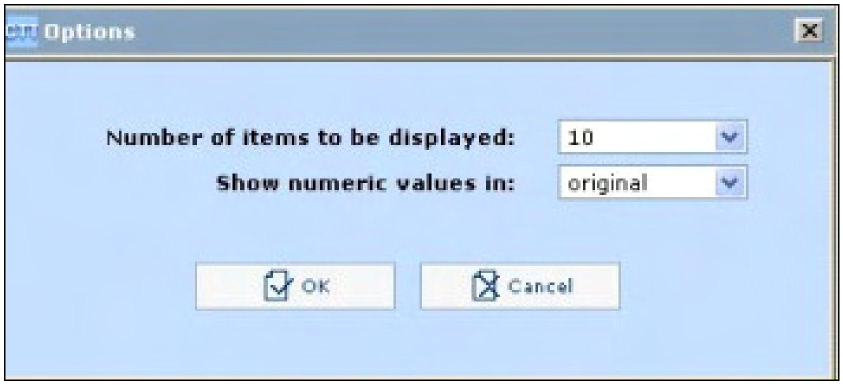


Figure 11: Setting the Chart Options

3. Define the format in which the numeric values should be displayed on the chart, i.e. whether the original values should be displayed or they should be shown in thousands, millions, etc. This prevents large numeric values represented by many zeros from taking a lot of space on the chart.
4. After finishing, click the **Ok** button for the changes to take effect.
   Or, click the **Cancel** button to discard the changes made.

5.4 Viewing Chart Constituent Details

The user can view detailed information about the chart constituents. To view more detailed information about the chart constituents, the user should follow the steps described below.

<u>Steps:</u>

1. Click on the chart constituent for the details to be displayed. The user will be directed to the *Details* section of the application where all items matching the selection will be listed. The first item in the list will be displayed in an expanded mode.
2. Take the necessary actions (add new items, edit existing ones, etc.).
3. After finishing, click the **Close** button to return to the *Chart* module.

5.4.1 Adding a New Grouping Item

In the *Details* section, the user can add a new grouping item. In order to add a new grouping item, the user should follow the steps described below.

<u>Steps:</u>

1. Click on the **New** button at the top of the *Details* screen. The user will then be directed to the *Data Entry* module of the *Commodity Tracking Tool* application. Please note that depending on your choice of the grouping (request, purchase order, invoice, and donation), the respective data entry form will open.
2. In the *Data Entry* module, fill in the information requested. **Note:** Please refer to the ***Data Entry Module*** user manual for more details on how to enter grouping item data into the application.

5.4.2 Editing an Existing Grouping Item

In the *Details* section, the user can edit an existing grouping item. In order to edit an existing grouping item, the user should follow the steps described below.

Steps:

1. Click on the **Edit** button at the top of the *Details* screen. The user will then be directed to the *Data Entry* module of the *Commodity Tracking Tool* application. Please note that depending on your choice of the grouping (request, purchase order, invoice, and donation), the respective data entry form will open.
2. In the *Data Entry* module, make the appropriate changes. **Note:** Please refer to the ***Data Entry Module*** user manual for more details on how to enter project data into the application.

5.4.3 Deleting an Existing Grouping Item

In the *Details* section, the user can delete an existing grouping item. In order to delete an existing grouping item, the user should follow the steps described below.

Steps:

1. In the *Details* sub-section, select the grouping item to be deleted.
2. Click the **Delete** button at the top of the *Details* screen. The selected grouping item will be deleted.

6. MAP MODULE

In the *Map* module of the *Commodity Tracking Tool* application, the user can create and execute ad-hoc queries on the data stored in the system, and have the results displayed on the map. The *Map* module is shown in Figure 12 below.

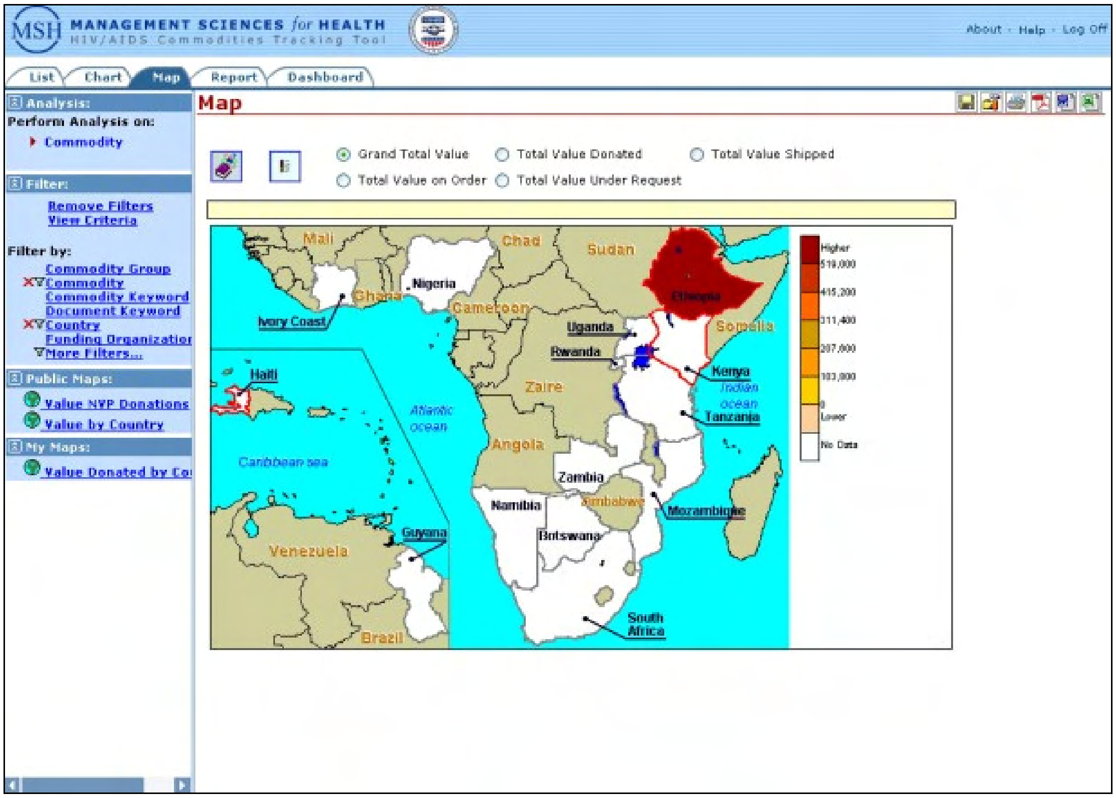


Figure 12: CTT Application Map Module

In the left frame of this screen, the user is able to view the following sections:

- **Analysis**
  <u>Perform Analysis on</u>:
  This option allows the user to define the object of the analysis. By defining an appropriate object, the user specifies to the application which data the following ad-hoc queries will be run on. If the analysis object is changed, the system will reset the list of categories and measures on the user's screen accordingly. In the current design, only one option is possible:
  - ***Commodity:***
- **Filtering**
  This section contains the list of categories/hierarchies by which the user may define filters for ad-hoc queries. For user's convenience, the most frequently used filtering categories are constantly present on the screen, whereas others become available when the user clicks on the *More Filters* hyperlink.
- **Public Maps** and **My Maps**
  This section contains a number of predefined map reports that are stored in the database. Two options are available in this section:

- ***Public Maps:***
  This section contains the map reports available to all users of the application.
- ***My Maps:***
  This section contains the map reports available to the current user only.

6.1 Accessing the *Map* Module

As it has been stated above, the system provides for the opportunity to present data on the map. In order to access the *Map* module of the system, the user should follow the steps described below.

Steps:

1. Click on the **Map** tab. The user will be navigated to the *Map* module of the application where a default map is displayed.
2. In this module, the user can create map reports, save them as pre-defined reports, arrange them in the desired way, print them, etc.

6.2 Instructions for Creating Map Reports

The steps described provide instructions on how to create map reports.

Steps:

1. Define whether a category-based map or a scaling map will be created by clicking on the relevant button.
   - **Category-based Map**
     The category based map can be of one type, i.e. Funding Organization based map. To display the information of this category on the map, the user should click on the  button. The map legend to the right will prompt what icons stand for the category items. Please note that the user can receive factual information about the projects in any of the countries displayed when pointing the mouse cursor on the appropriate icon. The information will be displayed in the status bar above the *Map* screen.
   - **Scaling Map**
     The user can select to show data on the scaling map by clicking the  **(Scaling)** button on the toolbar above the *Map* screen and choosing the category to be displayed on the map. The regions in the map generated will be colored according to the number of the projects. When pointing the mouse cursor on the region, the actual number of the projects received will be displayed in the status bar.

Example Map Report

In the event the user selects to view the funding organization information according to commodities and countries to be displayed on a category-based map, s/he will acquire the map report shown in Figure 13 below.

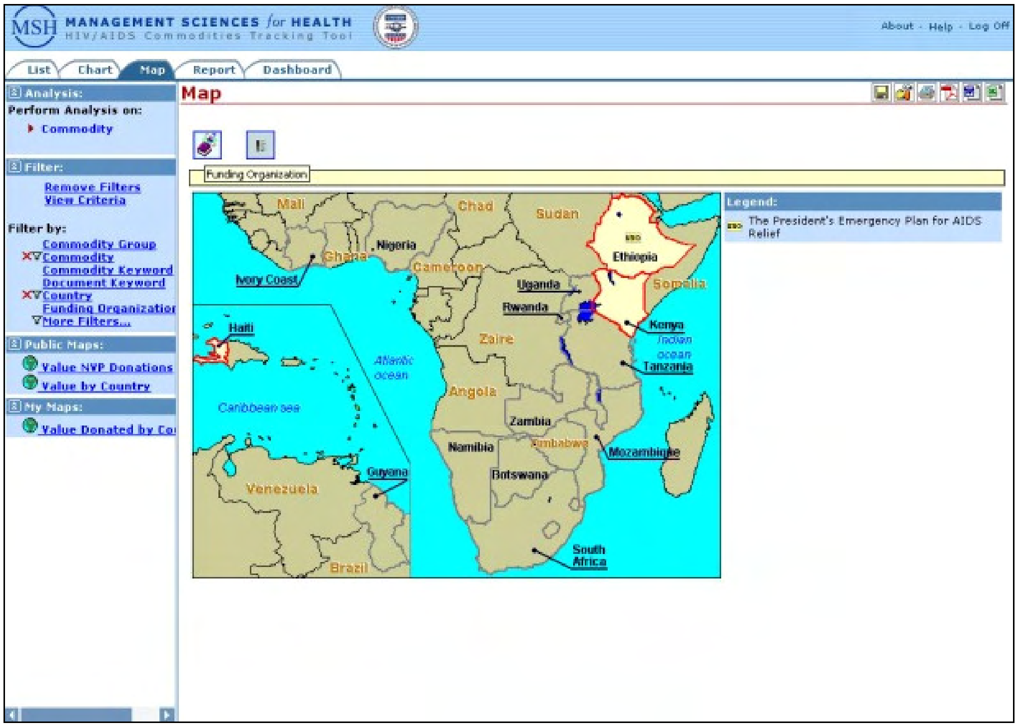


Figure 13: Example Map Report

6.3 Viewing Map Category Details

The user can view detailed information about the categories displayed on the map. In order to view more detailed information about the categories, the user should click on the respective icon on the category-based map and on a definite region on the scaling map.

Steps:

1. Click on the appropriate icon for the details to be displayed. The user will be directed to the *Details* sub-section of the application where all items matching the selection will be listed. The first item in the list will be displayed in an expanded mode.
2. Take the necessary actions (add new items, edit existing ones, etc.).
3. After finishing, click the **Close** button to return to the *Map Screen*.

6.3.1 Adding a New Grouping Item

In the *Details* section, the user can add a new grouping item. In order to add a new grouping item, the user should follow the steps described below.

Steps:

1. Click on the **New** button at the top of the *Details* screen. The user will then be directed to the *Data Entry* module of the *Commodity Tracking Tool* application. Please note that depending on your choice of the grouping (request, purchase order, invoice, and donation), the respective data entry form will open.

2. In the *Data Entry* module, fill in the information requested. **Note:** Please refer to the ***Data Entry Module*** user manual for more details on how to enter grouping item data into the application.

6.3.2 Editing an Existing Grouping Item

In the *Details* section, the user can edit an existing grouping item. In order to edit an existing grouping item, the user should follow the steps described below.

Steps:

1. Click on the **Edit** button at the top of the *Details* screen. The user will then be directed to the *Data Entry* module of the *Commodity Tracking Tool* application. Please note that depending on your choice of the grouping (request, purchase order, invoice, and donation), the respective data entry form will open.
2. In the *Data Entry* module, make the appropriate changes. **Note:** Please refer to the ***Data Entry Module*** user manual for more details on how to enter project data into the application.

6.3.3 Deleting an Existing Grouping Item

In the *Details* section, the user can delete an existing grouping item. In order to delete an existing grouping item, the user should follow the steps described below.

Steps:

1. In the *Details* sub-section, select the grouping item to be deleted.
2. Click the **Delete** button at the top of the *Details* screen. The selected grouping item will be deleted.

7. REPORT MODULE

In the *Report* module of the *Commodity Tracking Tool* application, the user can create and execute ad-hoc queries on projects data, and acquire results in the form of different reports.

In the left frame of this screen, the user is able to view the following sections:

- **Analysis**
  Perform Analysis on:
  This option allows the user to define the object of the analysis. By defining an appropriate object, the user specifies to the application which data the following ad-hoc queries will be run on. If the analysis object is changed, the system will reset the list of categories and measures on the user's screen accordingly. In the current design, only one option is possible:
  - ***Commodity:***
- **Filtering**
  This section contains the list of categories/hierarchies by which the user may define filters for ad-hoc queries. For user's convenience, the most frequently used filtering categories are constantly present on the screen, whereas others become available when the user clicks on the *More Filters* hyperlink.
- **Public Reports** and **My Reports**
  This section contains a number of predefined map reports that are stored in the database. Two options are available in this section:
  - ***Public Reports:***
    This section contains the list reports available to all users of the application.
  - ***My Reports:***
    This section contains the list reports available to the current user only.

7.1 Accessing the *Report* Module

As it has been stated above, the system provides for the opportunity to create different sorts of list reports. In order to access the *Report* module of the system, the user should follow the steps described below.

Steps:

1. Click on the **Report** tab. The user will be navigated to the *Report* module of the application where the Report Designer shown in Figure 14 will open.
2. In this module, the user can create list reports, save them as pre-defined reports, arrange them in the desired way, print them, etc.

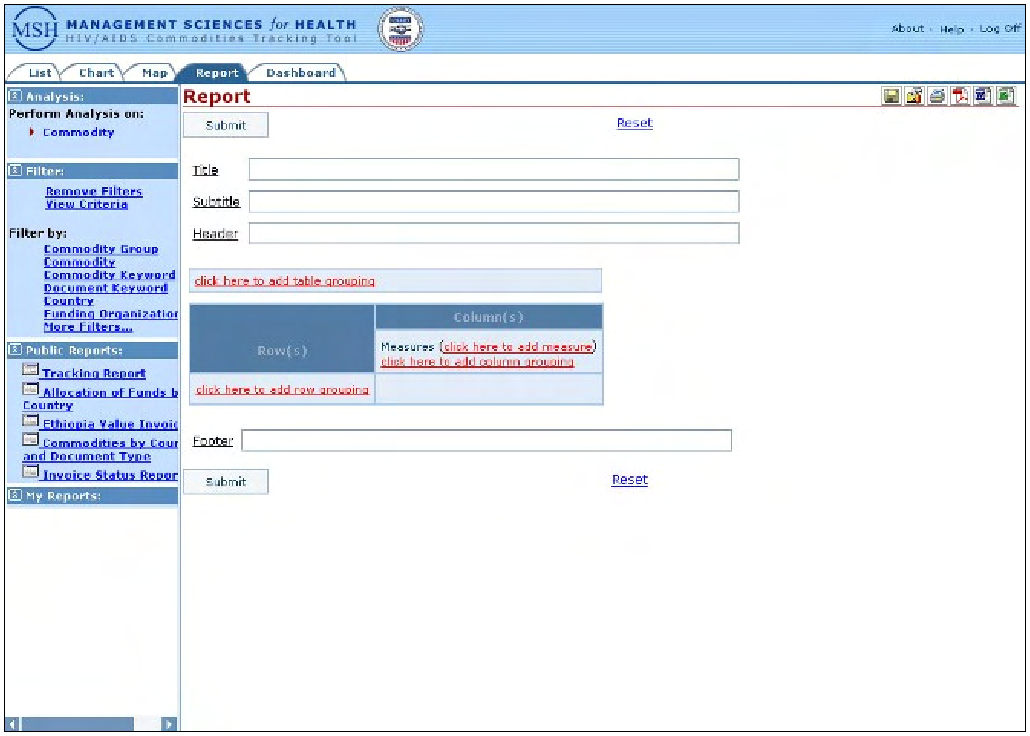


Figure 14: CTT Application Report Module

7.2 Instructions for Creating a Report

In order to create a report, the user should follow the steps described below, which provide for instructions on how to compose and submit queries.

<u>Steps:</u>

1. In the Report Designer, enter a 'Title' for the report. This field is required.
2. Enter a 'Subtitle', 'Header', and 'Footer' if needed. These fields are optional.
3. Click on the <u>click here to add table grouping</u> hyperlink below the "Header" to add a table grouping. This is also optional. **Note:** The report will be divided into as many tables as there are table groupings selected.
4. Select row groupings and column groupings.
   - Select the row groupings by clicking on the <u>click here to add row grouping</u> link under 'row(s)'. Choose one row grouping at a time from the list of available row groupings displayed in the popup box that appears as shown in Figure 15.
   - Select the column groupings by clicking on the <u>click here to add column grouping</u> hyperlink under 'columns(s)'. Choose one column grouping at a time from the list of available column groupings displayed in the popup box that appears.
5. Select the fields to be displayed for the column groupings by clicking on the <u>click here to add measure</u> hyperlink under 'Columns'.
6. Click on the **Submit** button to preview the report.
7. Clicking the **Back** button will direct the user to the main screen of the *List* module.

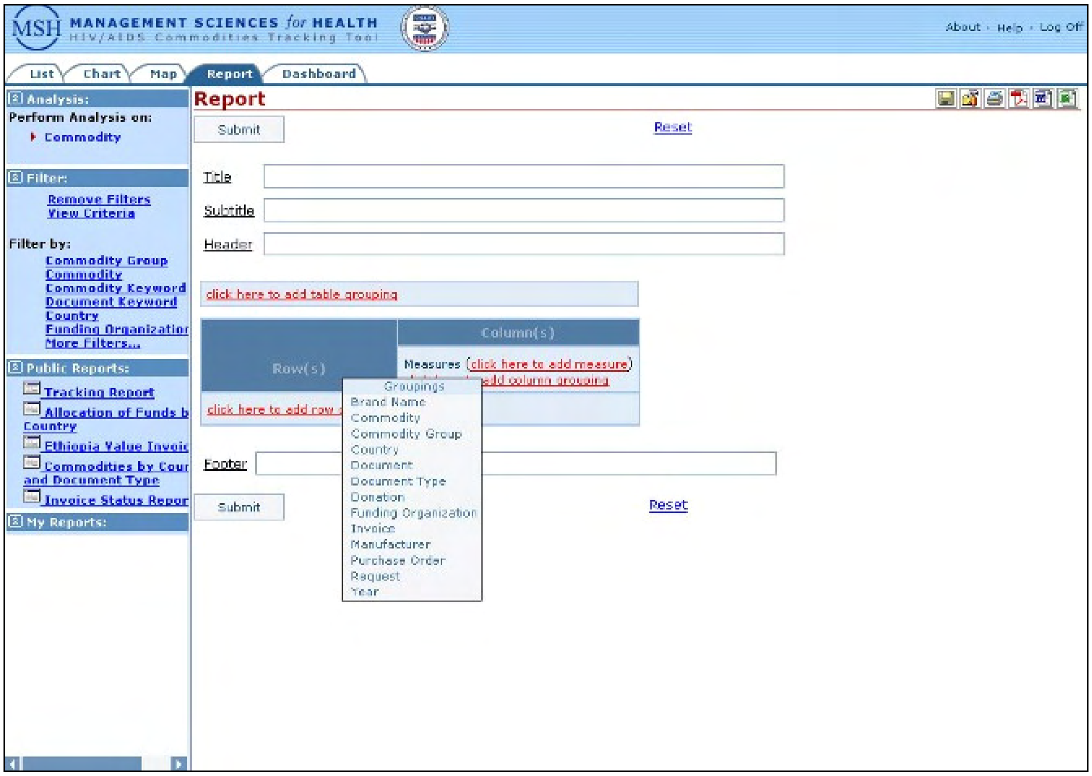


Figure 15: Selecting a Row Grouping for a Report

Example Report

In the event the user indicates:

- "Ethiopia Invoices" as the report title;
- "Invoice" as the row grouping;
- "Total Value Shipped" as a measure as shown in Figure 16;

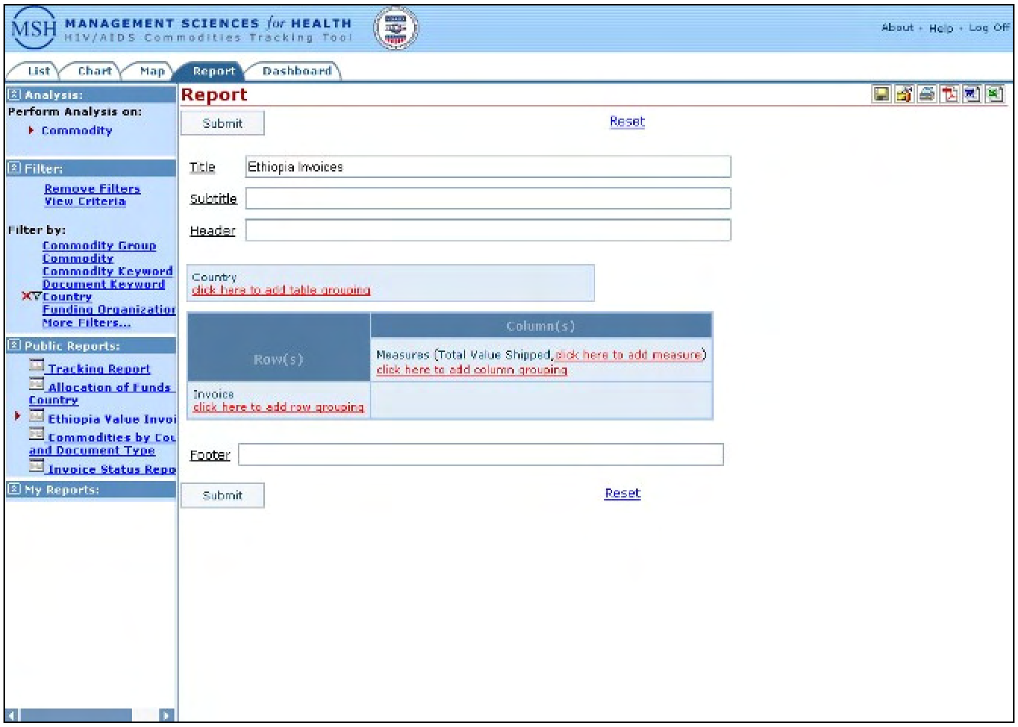


Figure 16: Creating a Report

s/he will acquire the list report shown in Figure 17 below.

Ethiopia Invoices

Ethiopia

Invoice	Total Value Shipped
ASI4101	$57,000
ASI4108	$551,145
ASI4124	$6,655
ASI4125	$147,663
ASI5010	$52,191
ASI5012	$121,581
ASI5020	$189,430
ASI5026	$45,878
ASI4100	$35,420
ASI5014	$823,152
ASI5031	$30,176
ASI5032	$57,000
ASI5038	$6,375
ASI5039	$99,251
ASI5046	$7,134
ASI5052	$50,388
ASI5066	$28,285
ASI4123	$45,797
ASI5228	$89,598
ASI5129	$166,782

Figure 17: Example List Report

7.3 Customizing Reports

The user can customize the reports by assigning value characteristics to groupings, re-ordering row and column groupings, etc. The sections below will describe what steps the user should take in order to customize the reports.

7.3.1 Changing the Grouping Properties

The user may assign value characteristics such as font, font size, font color, background color, alignment (i.e. left, center, or right), bolding, italicizing, and underlining to a grouping. In order to assign value characteristics to a grouping, the user should follow the steps described below.

Steps:

1. Click on the grouping value whose properties need to be changed.
2. Select the *Properties* option from the actions list that appears. The *Properties* window shown in Figure 18 will appear.
3. Change the properties as needed.
4. After finishing, click the **Ok** button for the changes to take effect.
   Or, click the **Cancel** button to discard the changes made.

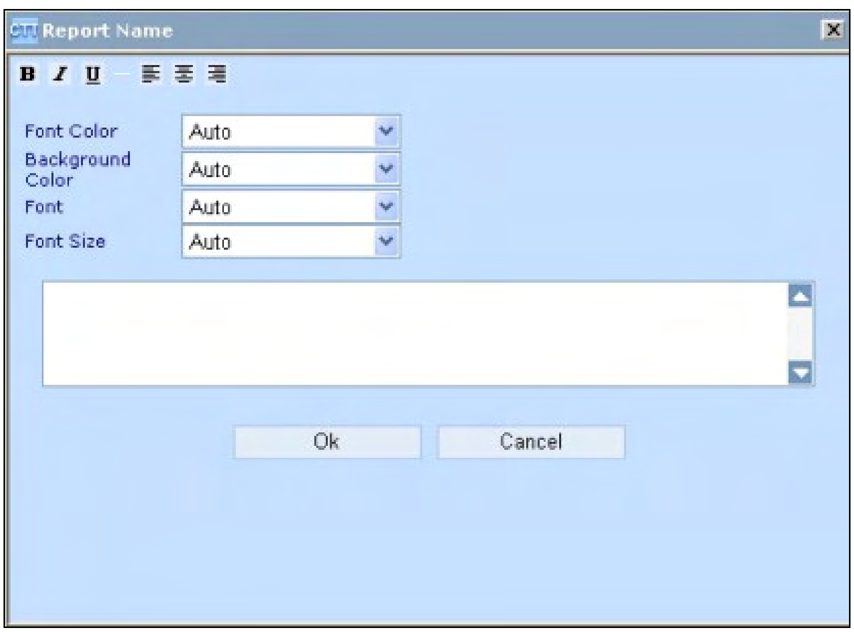


Figure 18: Assigning Value Characteristics to a Grouping

7.3.2 Re-ordering Row/Column Groupings in a Report

This option enables the user to establish and modify the order of the grouping values. In order to re-order row / column groupings, the user should follow the steps described below.

Steps:

1. Click on the grouping that needs to be reordered in the report.
2. Select the *Move Up* / *Move Down* option from the actions list that appears. The printed report will maintain the order of the groupings that was displayed in the *Create Report* page.

It is also possible to re-order an entire section of row / column groupings with their respective rows / columns. In order to re-order sections, the user should follow the steps described below.

Steps:

1. Click on the section that needs to be re-ordered in the report.
2. Select the *Move Section Up / Move Section Down* option from the actions list to re-order row grouping section. Or, select the *Move Section Left / Move Section Right* option from the actions list to re-order column grouping section.

The printed report will maintain the order of the sections that was displayed in the *Create Report* page.

7.3.3 Sorting Grouping Values of a Report

The user may change the order in which the grouping values are displayed. The values can be sorted either in an *Ascending* (A-Z) or a *Descending (Z-A)* order. In order to alphabetically sort the grouping values, the user should follow the steps described below.

Steps:

1. Click on the value grouping for which the sorting order needs to be changed.
2. Select the *Sorting Order* option from the actions list.
3. Define whether the report item values should be sorted in the ascending or descending order. **Note:** Selecting the *None* option from the list removes the sorting criteria.

7.3.4 Displaying Totals in a Report

The user may choose to display totals for row or column groupings in the reports. These totals can be placed before or after the values of the groupings. In order to define whether the totals should be displayed in the report, the user should follow the steps described below.

Steps:

1. Click on the row / column grouping for which totals need to be added.
2. Select the *Total* option from the actions list that appears shown in Figure 19.
3. Define whether the totals should be displayed before or after the report item value. **Note:** Selecting the *None* option from the list will not display the totals.

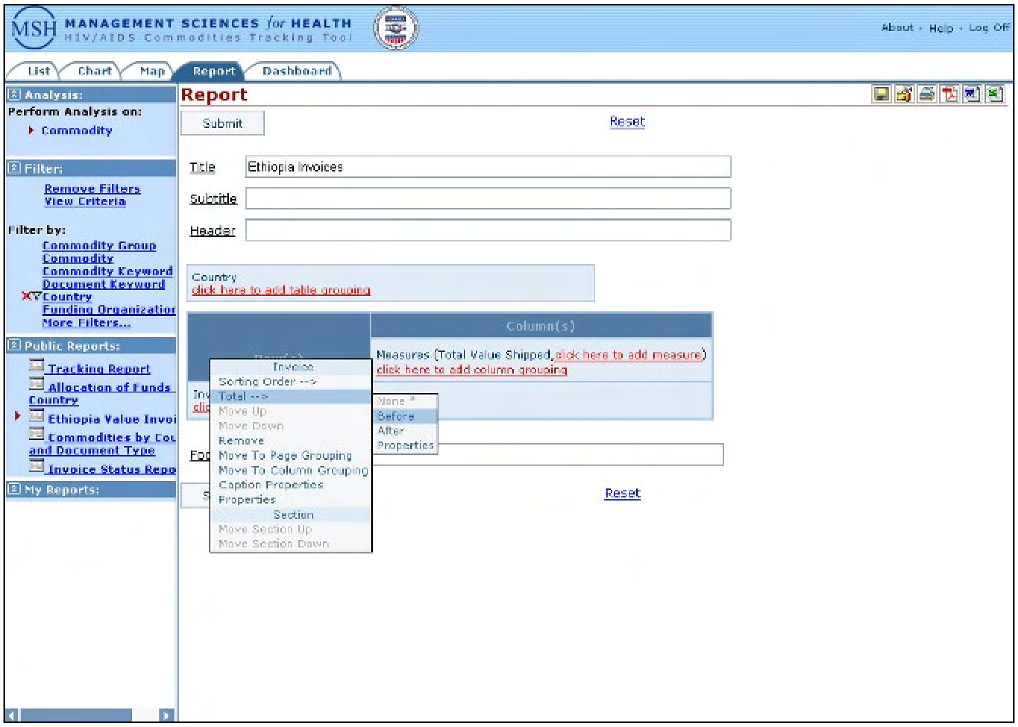


Figure 19: Displaying Totals in a Report

7.3.5 Removing a Grouping Value

It is possible to remove a grouping value from being included in the report, if this is necessary. In order to remove a grouping value from the report, the user should follow the steps described below.

Steps:

1. Click on the grouping value that needs to be removed.
2. Select the *Remove* option from the actions list. The selected grouping value will be removed.

Moreover, it is possible to remove an entire section of row / column groupings with their respective rows / columns. In order to remove a section, the user should follow the steps described below.

Steps:

1. Click on the section that needs to be removed.
2. Select the *Remove Section* option from the actions list. The selected section will be removed.

Note: At any point it is possible to remove all categories and measures from the report structure and design a new report from scratch by clicking on the Reset hyperlink located at the right top of the *Report Screen*.

7.3.6 Switching Groupings

The groupings may be switched between table header, row and column by selecting the appropriate option from the actions list. In order to switch a grouping, user should follow the steps described below.

Steps:

1. Click on the grouping that needs to be switched.
2. Select the appropriate *Move to Page Grouping* / *Move to Row Grouping* / *Move to Column Grouping* option from the actions list. **Note:** The user may select the *Move to Page Grouping* option if s/he wishes to define the selected row and/or column heading as table header. Selecting the *Move to Row Grouping / Move to Column Grouping* options will define the selected table header / column grouping respectively as a row grouping / column grouping.

8. DASHBOARD MODULE

The *Dashboard* module of the *Commodity Tracking Tool* application gives the user a possibility to view various types of reports such as lists, maps, and charts in a user friendly environment on a dashboard.

In the *Dashboard* module, users will be able to move, resize, arrange, and save locations of the reports on their dashboards. Users may define/create more than one dashboard containing different set of reports. Users may also save/remember the arrangements of reports in a dashboard. The *Dashboard* module is presented in Figure 20 below.

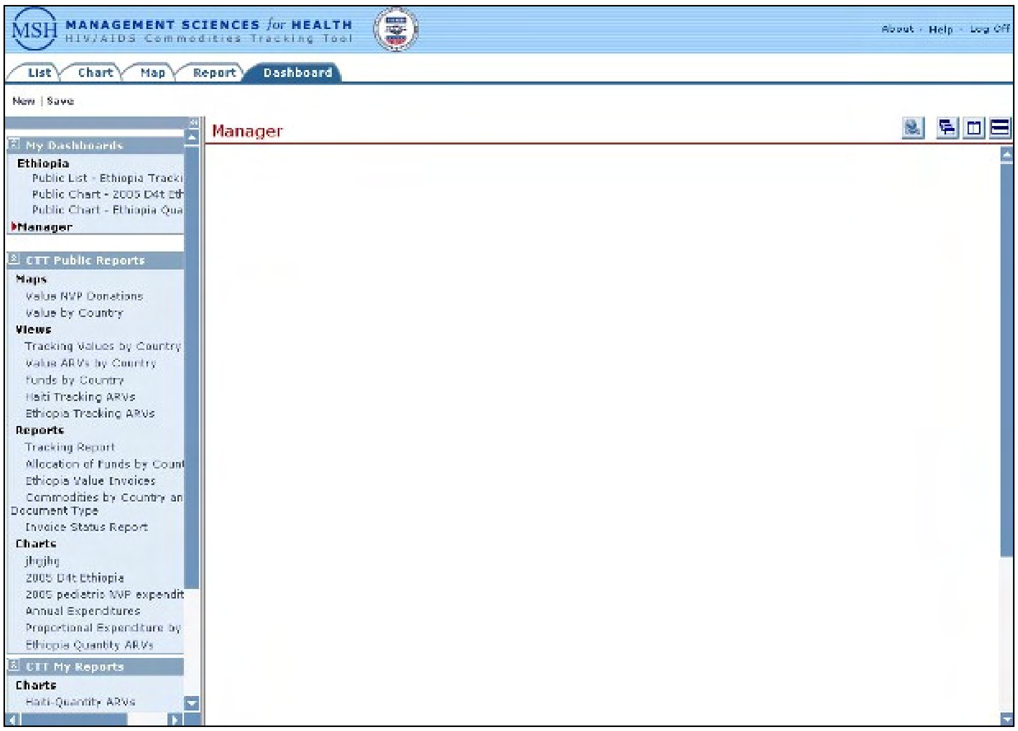


Figure 20: CTT Application Dashboard Module

In the left frame of the screen, the user is able to view the following sections:

- **My Dashboards:**
  The *My Dashboards* section is the where all created dashboards are displayed for quick reference. The *My Dashboards* section consists of the two main elements: Dashboards that have been created, and Reports and/or URLs that the dashboards contain. Only the reports / URLs that are currently displayed and reports/URLs that have been saved with a specific configuration on the Dashboard are displayed in the list. In the event a report from the *MSH Reports* section is selected to be displayed, the appropriate link appears under the currently selected dashboard. Once the report is closed, the link disappears.
- **CTT Public Reports:**
  The *CTT Public Reports* section is where all the predefined reports stored in the system are displayed. These are the predefined reports that are available to all users of the system. Clicking on the link of the report listed under the *CTT Public Reports* section will open the selected report in the work space. Please note that each report is opened in a new window. The *CTT Public*

Reports section is further divided into sub-sections which contain different sets of reports. In the current design, the following sub-sections are available:

- *Public Views* – This section contains a set of predefined public views.
- *Public Reports* - This section contains a set of predefined public list reports.
- *Public Charts* - This section contains a set of predefined public chart reports.
- *Public Maps* - This section contains a set of predefined public map reports.

- **CTT My Reports:**
  The *CTT My Reports* section is where all the predefined reports available to the current user only. Clicking on the link of the report listed under the *CTT My Reports* section will open the selected report in the work space. Please note that each report is opened in a new window. The *CTT My Reports* section is further divided into sub-sections which contain different sets of reports. In the current design, the following sub-sections are available:
  - *My Views* – This section contains a set of views available to the current user only.
  - *My Reports* - This section contains a set of list reports available to the current user only.
  - *My Charts* - This section contains a set of chart reports available to the current user only.
  - *My Maps* - This section contains a set of map reports available to the current user only.

Note: It is possible to expand and collapse the *My Dashboards / CTT Public Reports / CTT My Reports* sections. In order to collapse the section, click on the upward-pointing arrows button. Clicking on the downward-pointing arrows button expands the section.

8.1 Accessing the *Dashboard* Module

In order to access the *Dashboard* module of the system, the user should follow the steps described below.

Steps:

1. Click on the **Dashboard** tab. The user will be navigated to the *Dashboard* module.
2. In this module, the user can create dashboards, include reports under them, etc.

8.2 Instructions for Creating Dashboards

In order to create a new dashboard, the user should follow the steps described below.

Steps:

1. Click on the **click here to add new dashboard** link in the *My Dashboards* section. A *New Dashboard* window shown in Figure 21 will appear with the default name for the dashboard.
2. Specify the name for the new dashboard.

Figure 21: Adding a New Dashboard

3. Click the **Ok** button to confirm adding. The newly created dashboard will be listed in the *My Dashboards* section and will have an empty report list.
4. Select the reports to be added to the dashboard by clicking on the relevant report name in the *CTT Public Reports / CTT My Reports* section.
5. Add links to the web sites that need to be included under the dashboard by following the instructions given in the paragraph below.

Note: It is possible to create a new dashboard by clicking on the **New** button at the top left corner of the *Dashboard* screen.

8.2.1 Adding a URL

In order to add a web site link to be included under a definite dashboard, the user should follow the steps described below.

Steps:

1. Click on the  **(Add a URL)** button in the top toolbar above the *Dashboard* screen. A *URL* window shown in Figure 22 will appear.

Figure 22: Adding a URL

2. Enter the link to the web site to be added to the dashboard in the respective field.
3. Enter the user-friendly display name for it.
4. After finishing, click the **Ok** button to confirm adding. All URLs added will be listed under the appropriate dashboard and will be displayed once selected.

8.2.2 Editing a URL

The user can modify the URL that s/he included under a definite dashboard. In order to modify the URL, the user should follow the steps described below.

Steps:

1. Select the URL that needs to be modified.
2. Right-click on the selected URL.

3. Select the *Edit* option from the actions menu shown in Figure 23. A *URL* window will appear with the selected URL information displayed.
4. Make changes in the data displayed as described in the paragraph above.
5. After finishing, click the **Ok** button for the changes to take effect.

Figure 23: Editing a URL

8.2.3 Re-ordering the URLs

The user can make the URLs appear in the desired order on the dashboard. In order to re-order the URLs, the user should follow the steps described below.

<u>Steps:</u>

1. Select the URL that needs to be re-ordered.
2. Right-click on the selected URL.
3. Select the respective *Move Down / Move Up* option from the actions menu.

8.2.4 Deleting a URL

The user can remove a particular URL from the dashboard. In order to remove a URL, the user should follow the steps described below.

<u>Steps:</u>

1. Select the URL that needs to be removed.
2. Right-click on the selected URL.
3. Select the *Delete* option from the actions menu. The selected URL will be removed from the dashboard.

8.3 Organizing Dashboards

It is possible to organize the dashboards and the reports listed under them in the desired way. Thus, the user can rename dashboards, reports and re-order them.

8.3.1 Renaming Dashboards / Reports

It is possible to rename existing dashboards. In order to rename a dashboard, the user should follow the steps described below.

<u>Steps:</u>

1. Select the dashboard that needs to be renamed.
2. Right-click on the selected dashboard.
3. Select the *Rename* option from the actions menu as shown in Figure 24. A *Renaming* window will appear.
4. Provide a new name for the dashboard.
5. Click the **Ok** button to confirm renaming.

Note: By right-clicking on the report listed under a particular dashboard and selecting the *Rename* option from the actions menu, the user can rename the selected report.

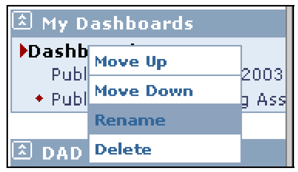


Figure 24: Renaming the Dashboard / Report

8.3.2 Re-ordering Dashboards / Reports

It is possible to re-order the dashboards in the desired way. In order to re-order the dashboards, the user should follow the steps described below.

Steps:

1. Select the dashboard that needs to be re-ordered.
2. Right-click on the selected dashboard.
3. Select the *Move Up / Move Down* option from the actions menu.

Note: Right-clicking on the report listed under a particular dashboard and selecting the *Move Up / Move Down* option from the actions menu re-orders the report within the dashboard.

8.3.3 Deleting a Dashboard / Report

It is possible to delete existing dashboards. In order to delete a dashboard, the user should follow the steps described below.

Steps:

1. Select the dashboard to be deleted.
2. Right-click on the selected dashboard.
3. Select the *Delete* option from the actions menu.

Note: Right-clicking on the report listed under a particular dashboard and selecting the *Delete* option from the actions menu removes the report from the dashboard.

8.4 Organizing Report Windows

The *Dashboard* module gives the user a possibility to simultaneously open and work with several reports, all of which are displayed in the workspace. To provide for a more user-friendly environment, the *Dashboard* module is designed in such a way that it allows the user to organize the opened report windows either in cascading or in tile order to ensure for more visualization.

8.4.1 Organizing Windows in Cascading Order

In order to organize the opened report windows in a cascading order, the user should follow the steps described below.

<u>Steps:</u>

1. Open as many report windows as the user intends to work with by clicking on the appropriate report links. The selected reports will open in the workspace.
2. Click the **(Cascade Windows)** button in the top toolbar above the *Dashboard* screen. The opened windows will be organized as shown in Figure 25.

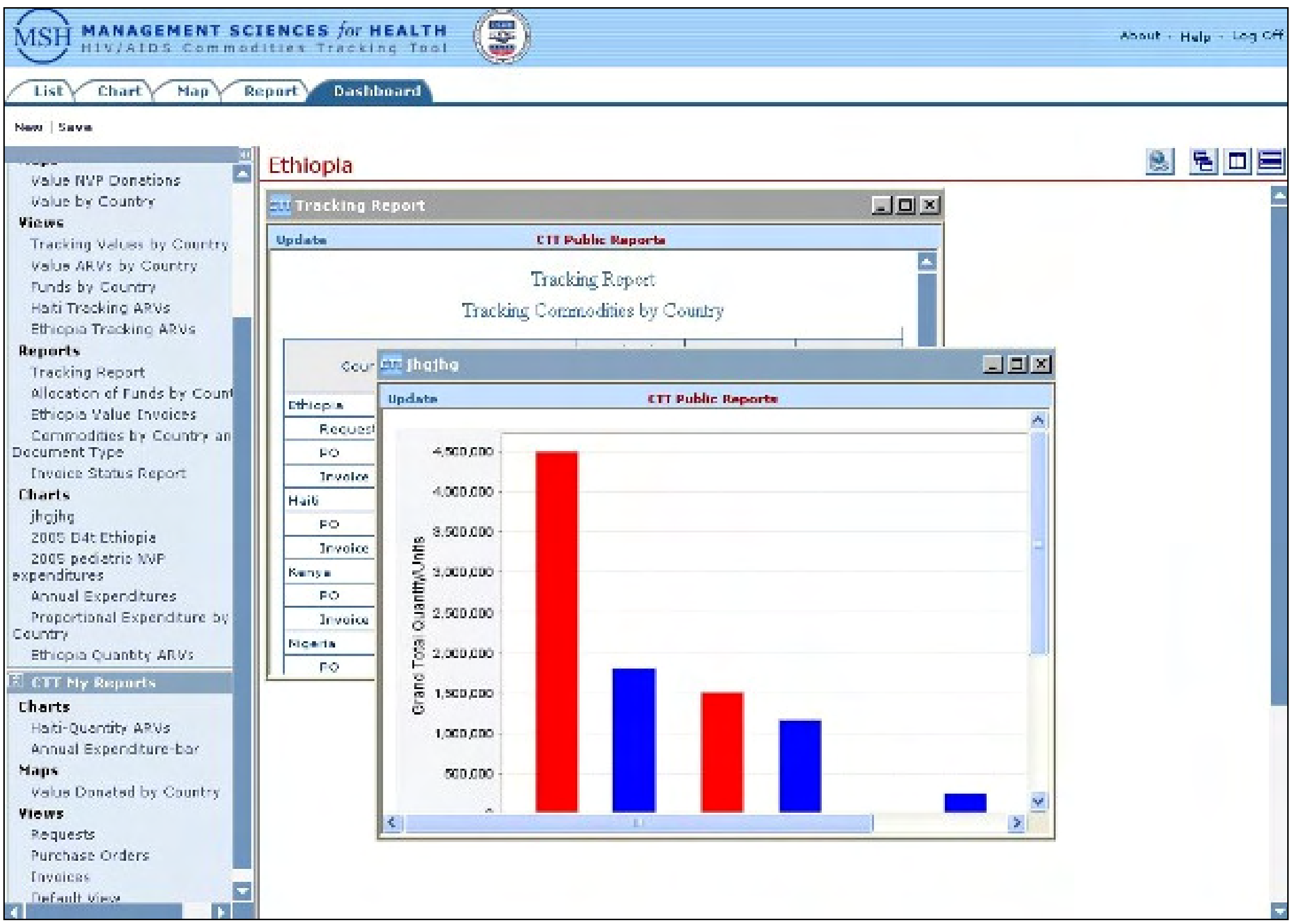


Figure 25: Organizing Windows in Cascading Order

8.4.2 Organizing Windows in Tile Order

The report windows can be arranged in tile order, which can be either vertical or horizontal. In order to organize the opened report windows in a tile order, the user should follow the steps described below.

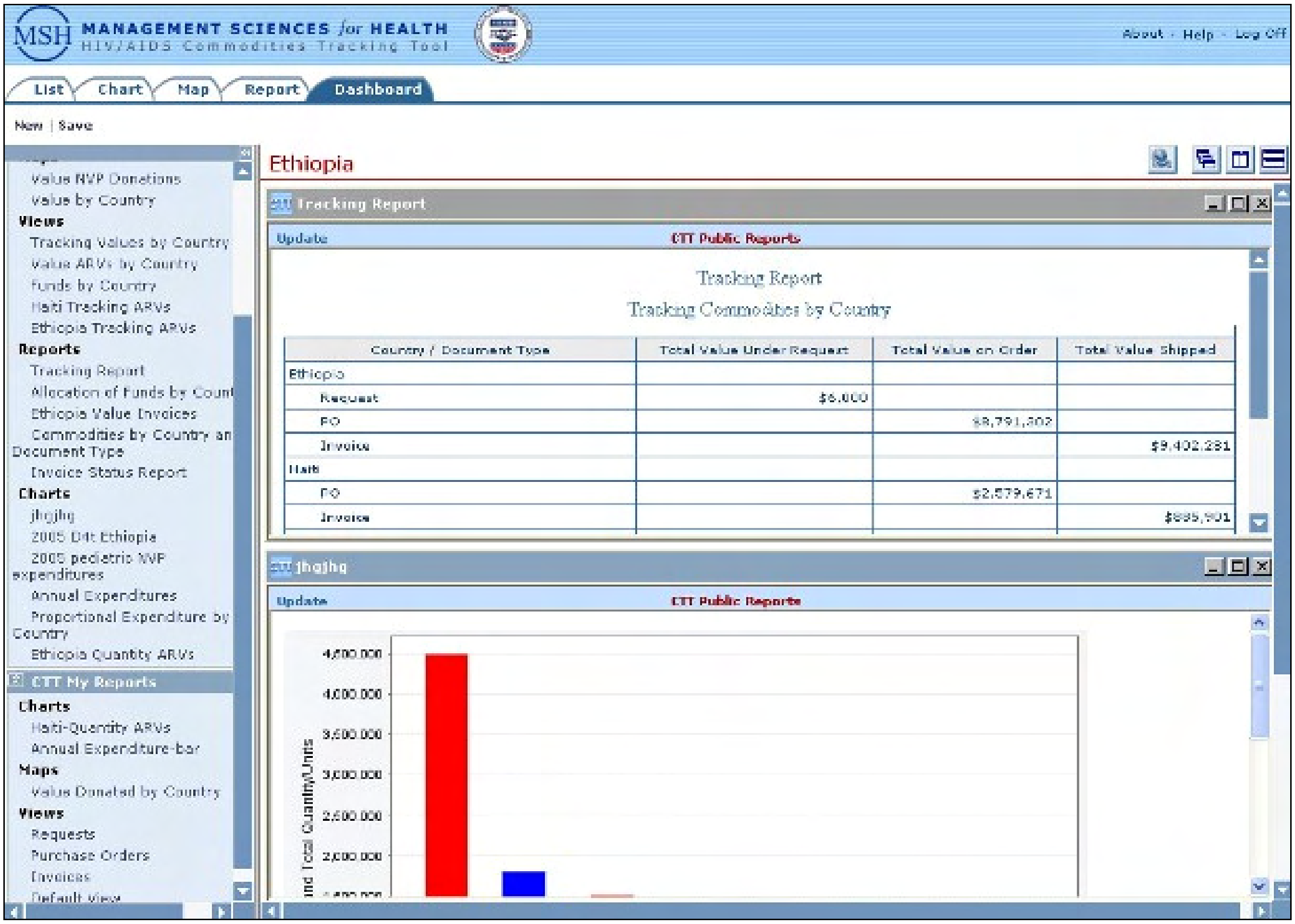


Figure 26: Organizing Windows in Horizontal Order

Steps:

1. Open as many report windows as the user intends to work with by clicking the appropriate report links. The selected reports will open in the workspace.
2. Click on the respective **(Tile Windows Vertically)** / **(Tile Windows Horizontally)** button in the top toolbar above the *Dashboard* screen. The opened windows will be organized as shown in Figures 26 and 27.

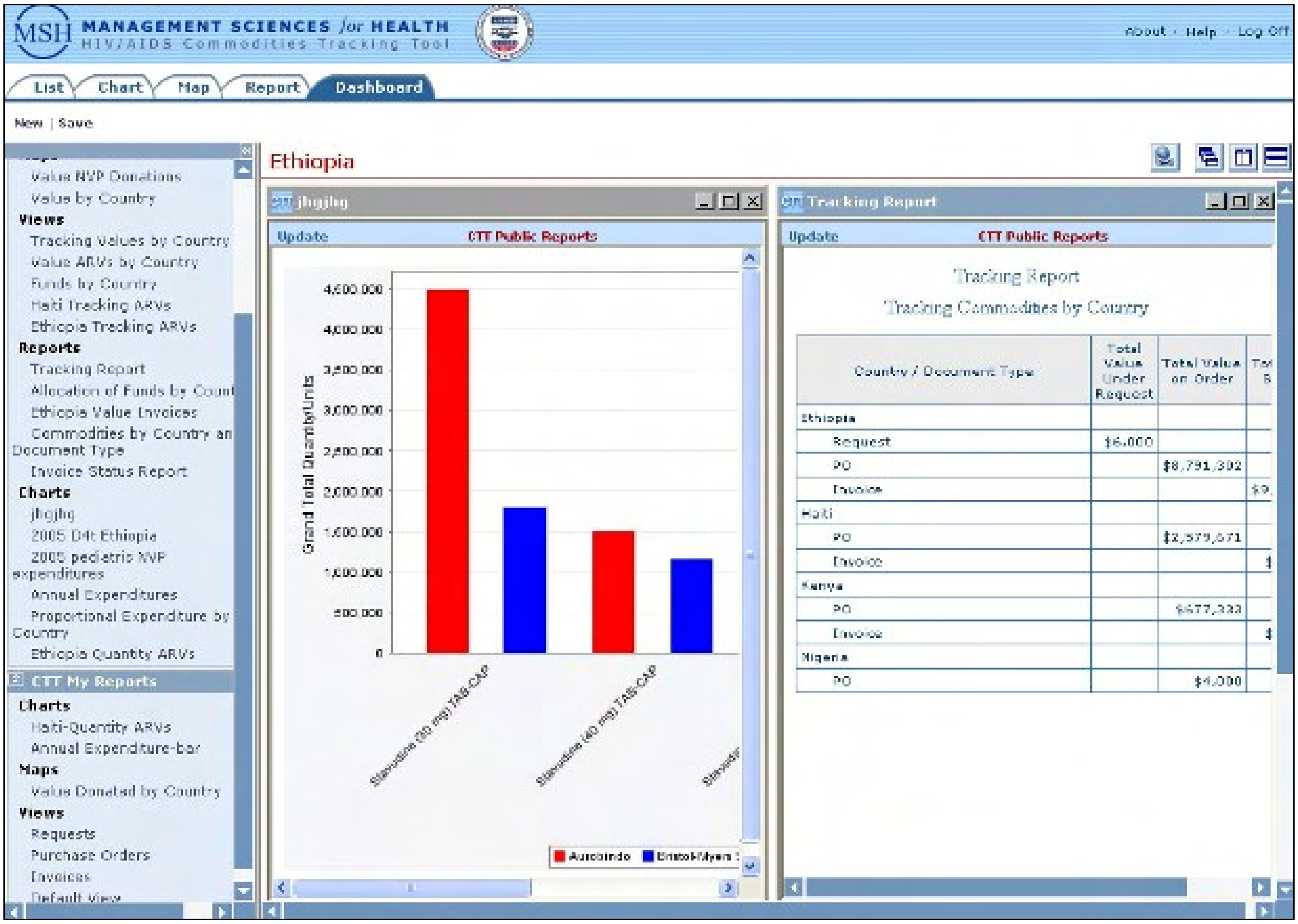


Figure 27: Organizing Windows in Vertical Order

8.5 Saving a Dashboard

The Dashboard module gives the user a possibility to save the dashboard with its current layout, i.e. with the reports selected for the given dashboard. When that specific dashboard is viewed in the future, the latest saved layout will be displayed.

In order to save a dashboard with its current layout, the user should follow the steps describe the steps described below.

Steps:

1. Select the reports to be listed under a particular dashboard.
2. Arrange them in the desired way.
3. Click the **Save** button at the top left corner of the *Dashboard* screen.

9. FILTERING

The system allows for data filtration. Filtering allows the user to narrow down the information displayed in the reports. The filtration works in the Step-by-Step technology, which enables the user to implement new filtering over the results of the previous one. This option reduces the size of reports and makes them easier to read. Filters can be added to new or existing reports. Defined filtering is applicable for list, reports, charts, and maps.

The list of the most frequently-used filter categories is displayed under the *Filter By:* section. When the user clicks on the *More Filters* link, the list of all available filter categories is displayed as shown in Figure 28 below.

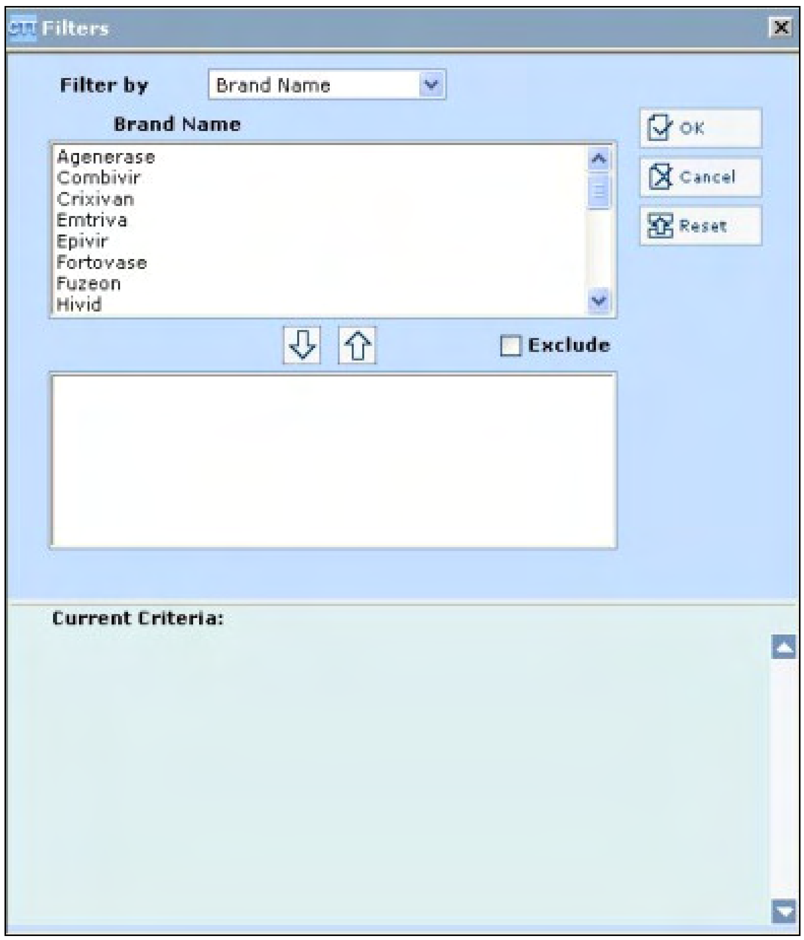


Figure 28: Accessing the Filters Section

9.1 Instructions for Creating Filtering Criteria

The user must follow the instructions described below to create filtering criteria.

Steps:

1. Click on the hyperlink under the *Filtering* section that represents the *Category* according to which the filtering will be carried out. A *Filters* window will appear having the <*Category Items*> pull down menu set to the selected *Category*. The first text area holds a list of all the available *Category* items that the report could display, whereas the second text area holds a sub-set list of the first one. The user may only edit the sub-set list in the second text area. At the end of the filtering, if the sub-set list is empty, all the *Category* items will be included in the report. If, however, the sub-set is non-empty, only the items in the sub-set list will be included in the report. At the bottom of the pop-up window the selection criteria from all categories are presented as shown in Figure 29. This view is also available from the main screen under the hyperlink "View Criteria".

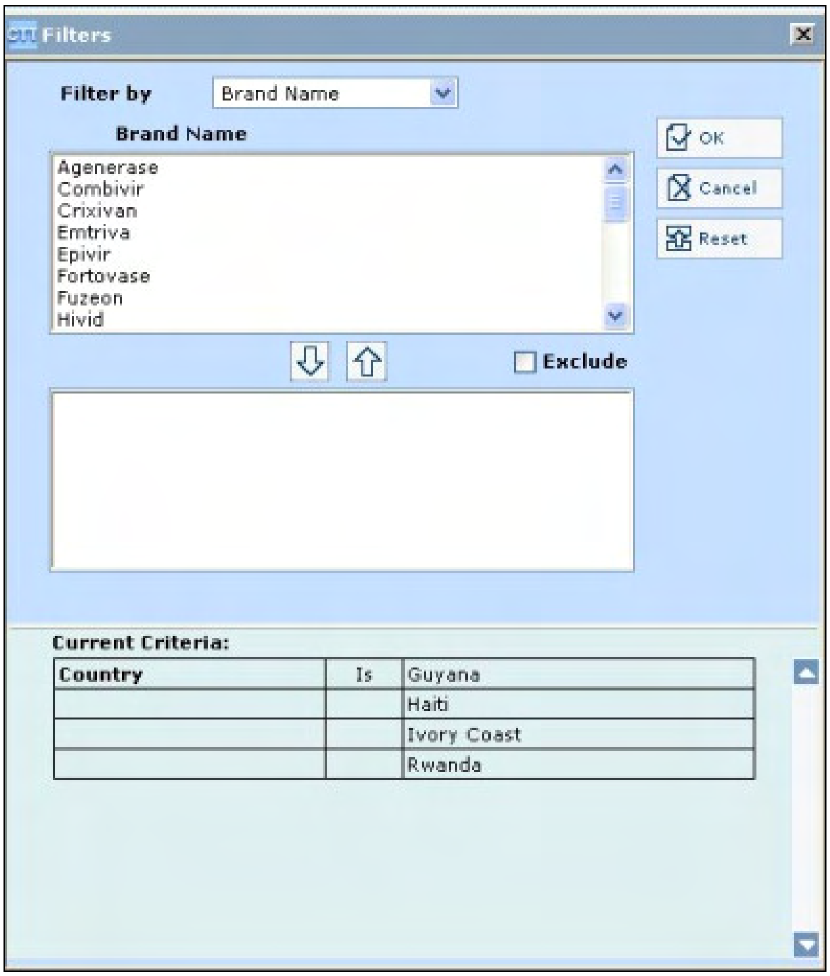


Figure 29: Viewing the Filtering Criteria

2. Select a *Category* item from the list in the first text area.
3. Click on the downward-pointing arrow button to add the item selected to the list in the second text area as shown in Figure 30.

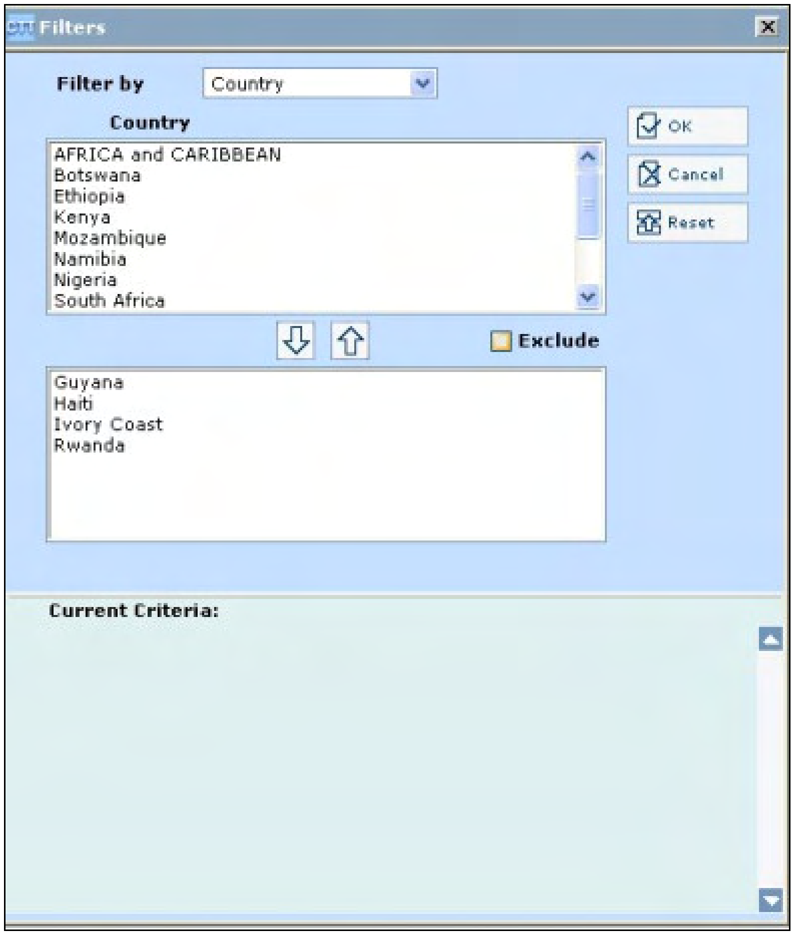


Figure 30: Creating a Filtering Criteria

4. Repeat steps 2 and 3 to add more than one *Category* item. **Note:** If a *Category* item needs to be removed from the second text area, select it from the list in the second text area and click on the upward-pointing arrow button.
5. Click on the **OK** button to apply the filtering to the ad-hoc query and to the screen that was active prior to the filtering alterations (i.e. List, Chart, or Map). The system will regenerate and download, to the client's side, an updated report that applies the updated filtering criteria.

Note: It is possible to exclude a *Category* item(s) from being included into the filtering criteria to be created. In this case the user has to tick the *Exclude* check box. All the *Category* items that appear in the second text area will be excluded from the filtering criteria to be created.

Example Filtering Criteria

In the event the user selects:

- "Country" as a filtering category; and,
- "Guyana", "Haiti", "Ivory Coast", and "Rwanda" as category items as shown in Figure 30 above

s/he will acquire the results which are shown in Figure 31.

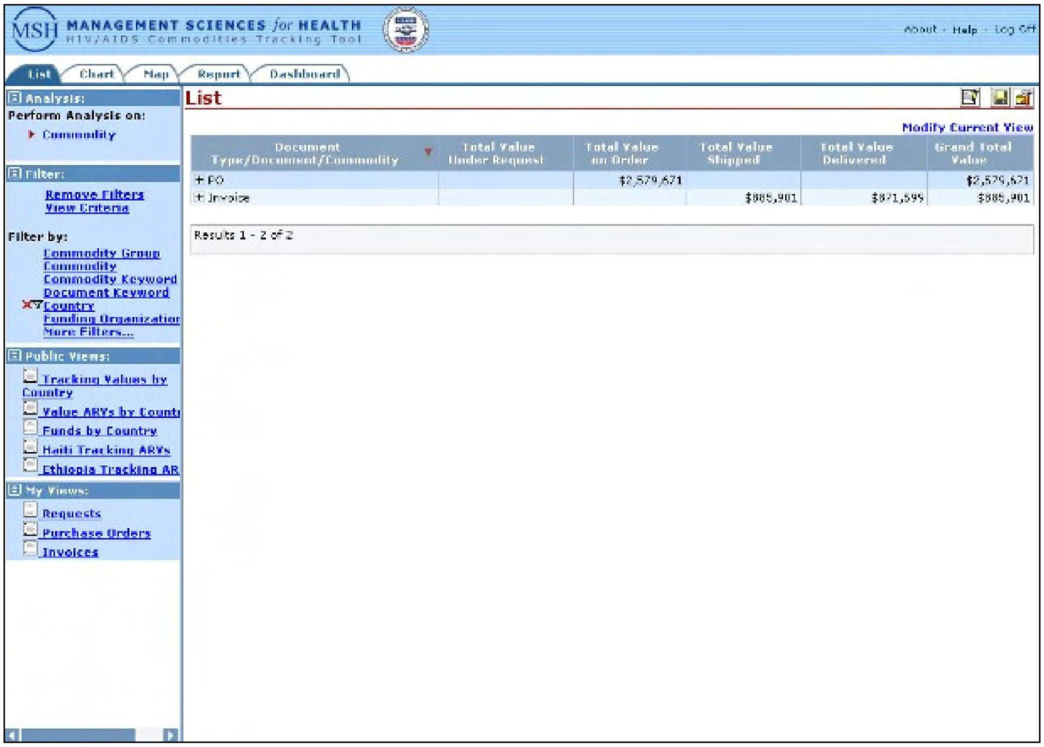


Figure 31: Filtered List

10. SAVING REPORTS

After creating reports of different types, the user can memorize them as pre-defined reports and include them either in the *Public Reports* group and make them available for all users who have got access to the application or in the *My Reports* group which is available only to the current user.

10.1 How to Save Reports

From the *List*, *Report*, *Chart*, and *Map* modules, the user can design an appropriate report and save it. In order to save the report created, the user should follow the steps described below.

Steps:

1. Click on the **Save** button on the top right side of the screen. A *Memorize Report* window shown in Figure 32 will appear.
2. Define the report name in the *Memorized Name* field.

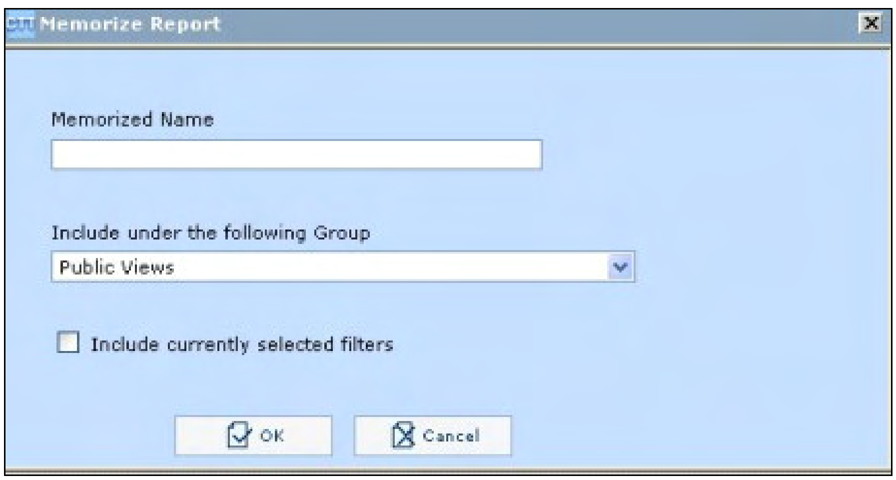


Figure 32: Memorizing a Report

3. Specify the group the report will be included in by selecting the appropriate value from the *Include under the Following Group* combo box.
4. Check the *Include currently selected filters* checkbox to save filtering defined along with the report.
5. Click on the **OK** button to save the report for future reference.

11. ORGANIZING REPORTS

The user can organize the reports in the desired way. This means that the user can rename the reports, create groups to include reports under, etc.

11.1 How to Organize Reports

From the *List*, *Report*, *Chart*, and *Map* modules, the user can design appropriate reports and organize them in the desired way. In order to organize the reports, the user should follow the steps described below.

Steps:

1. Click on the  **(Organize Reports)** button at the top right side of the screen. An *Organize Reports* window shown in Figure 33 will appear.

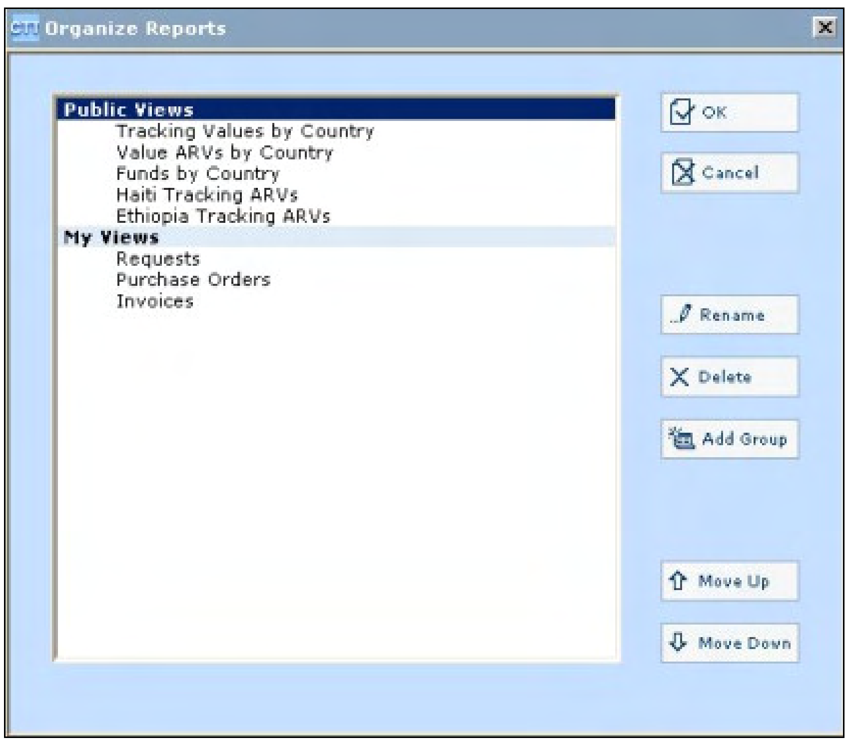


Figure 33: Organizing the Reports

2. Rename a report / report group, if necessary.
   In order to rename a report / report group:
   - Highlight the report / group that needs to be renamed.
   - Click the **Rename** button.
   - Fill in the desired name for the report / group.
   - Click the **Enter** keyboard button to confirm renaming.

   Note: *Public Reports* and *My Reports* groups cannot be renamed.
3. Delete a report / report group, if necessary.

In order to delete a report / report group:
- Highlight the report / group that needs to be deleted.
- Click the **Delete** button.
- Click the **Ok** button to confirm deletion. Or, click the **Cancel** button to abort the operation.

Note: *Public Reports* and *My Reports* groups cannot be deleted.

4. Add a sub-group to include reports under it.
   In order to add a sub-group:
   - Click the **Add Group** button. An editable text box shown in Figure 34 will appear.
   - Fill in the desired name for the sub-group.
   - Click the **Enter** keyboard button to confirm adding.

Figure 34: Adding a New Sub-group

5. Re-order reports / groups.
   In order to re-order reports / groups:
   - Highlight the report / group the sorting order of which needs to be changed.
   - Click the **Move Up / Move Down** button.

12. EXPORTING REPORTS

From the *Report, Chart*, and *Map* modules, the user can design appropriate reports and export them in the PDF / MS Word and MS Excel formats.

12.1 How to Export Reports

In order to export the reports in the PDF / MS Word and MS Excel formats, the user should follow the steps described below.

Steps:

1. Click on the respective **(Export in PDF Format)** / **(Export in MS Word Format)** / **(Export in MS Excel Format)** button. A separate window will open.
2. Make changes, if necessary.
3. Print it out by selecting the *Print* option from the **File** menu.

13. PRINTING REPORTS

From the *Report*, *Chart*, and *Map* modules, the user can design appropriate reports and print them out.

13.1 How to Print Reports

In order to print out the reports, the user should follow the steps described below.

Steps:

1. Click the  **(Print)** button in the top toolbar. A separate window will open.
2. Select the *Print* option from the **File** menu.