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<b>April 23, 2013, Version 1e</b>		
1	<i>Commodity Tracking System: CTS Accountability. Efficiency. Transparency. Responsibility</i>	
2	<i>CARE Module 2: Getting Started with CTS</i>	<i>Needs photos. With CTS Mark</i>
3	<b>Section 1: Introduction</b>	
4	The Commodity Tracking System, CTS, is a powerful tool for increasing accountability and transparency. It is easy to use, but as with any tool, you first need to know how to start it, stop it, and find its various features. This module, Getting Started with CTS, shows you how to get into and move around in system.	
5	The CTS that you use on the job will contain all of your up-to-date and active information. However, for these eLearning modules and your other training, you will be seeing a special version of CTS called the “Sandbox.” It works just like the one you will use for production, but it does not contain your real data.	
6	After you complete this module, you will know how to: <ul style="list-style-type: none"> <li>• Log in and log out of CTS</li> <li>• Access the menus and sub-menus you need to use</li> <li>• Describe the catalog and how it is used in CTS</li> <li>• Identify the inputs and outputs for CTS</li> <li>• Identify where to go for support</li> </ul>	
7	<b>Section 2: Logging In and Logging Out</b>	
8	CTS is a very secure system and not just anyone can access it. So before you can start using it, you need your credentials. These credentials let you into the system, just like a security badge lets you into a building. You get your credentials which include a “Login ID” and a “password,” from your CTS Project Team.	
9	As you learned in module 1, CTS is in the “cloud.” This means you access the system through the Internet So in addition to the credentials, you need the CTS web address. This address also	

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	comes from your CTS Project Team.	
10	When you type in the CTS web address into your browser, the Login screen for CTS immediately appears. This is where you gain access to the system. Here you enter your Login ID in the User Name field and your password in the Password field. You then click the blue “Log In” button or press Enter on your keyboard. If you ever forget your password, you can click “Forgot Your Password?” on the login screen to receive help.	
11	As soon as you log in, the CARE Commodity Tracking System screen appears. This is where you start your work every time. In the next section, you will learn about the menus you will use.	
12	Before we look at those menus, here is a reminder. The data that you are entering is going up to the Cloud so it will be accessible by others. With that in mind, you want to protect your password. Do not put it in a place, such as a drawer or your personal notebook, where it can be seen by everyone. The first time you enter your User ID and password you may want to change your password to one that is known to only you. Click the How to Change Your Password button to see how you can do this.	
	<p><i>1. On the Home screen, click “Change Password.” 2. Enter your current password in the Password box. 3. Enter your new password in the New Password box. 4. Enter it again in the Confirm New Password Box. 5. Click Change Password to cause the change to take effect.</i></p> <p><i>The password is not case sensitive, and you can use any combination of letters and numbers as long as you have at least 6 characters. Do not put any spaces in the password.</i></p>	
13	When you have finished entering data and want to leave the system, you need to log out. This can be done from any screen by simply clicking “Logout” in the upper right corner of the menu bar. Logging out locks the door to CTS, just like you lock the door to your building at night. You should log out at the end of the day and whenever you leave your office or stop working in CTS for a while. When you are out of the system, you will see a “You are logged out,” message. You must log back in before you can do more work. You click “login” to see the login screen.	
14	Now that you know how to access CTS and log in, you are ready to take a tour of the program. But before starting the next section, click “Review” to check what you have learned so far.	
15	<i>Section Review</i>	

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16	<b>Section 3: The Key Menus You Will Use</b>	
17	CTS is menu-driven, which means that you access all parts of the system by clicking on menus and their associated sub-menus. The Commodity Tracking System screen is where you find menus that you will use. As you learned in Module 1, the screens are customized for different roles. In this training, we are logged in as a User.	
18	As a User, you have 5 menus available – Start, Review, Reports, Configure, and Home. Each menu contains sub-menus that you use for different activities within CTS. Notice that the sub-menus appear on screen as you rollover each menu title with your mouse. To access a sub-menu, your mouse cursor must change from the arrow to the hand. No menu, sub-menu, or button will work unless the cursor is a hand. Let's take a look at these menus and their sub-menus now.	
19	Start is the menu you will use most often because it is where you access the screen that allows you to enter inventory into the system and dispatch it when it leaves the warehouse. When you click on Start, a panel drops down. The panel contains 4 submenus that correspond to your basic tasks – Convert, Dispatch Wizard, Pre-Receive Wizard, and Receiving Wizard. Click on each item now to see a brief description of how it is used. Click on the item again to close it. When you are finished looking at the descriptions, click Forward to continue.	
	<p><i>Menu item descriptions:</i></p> <p><i>Convert - Allows you to exchange items from one unit to another unit, or from multiple items to one item (such as in a kit), or from one item to another item.</i></p> <p><i>Dispatch Wizard - Allows you to dispatch items from your inventory to your programs. For example, you might dispatch food to a food distribution point, fuel to a vehicle, tents to an IDP or refugee camp, medicines to a health clinic, or office supplies to a sub-office or to a project.</i></p> <p><i>Pre-Receive Wizard - Allows you to enter information for items you are expecting to receive into the system. This includes Purchase Requests, Purchase Orders, Call Forward, Bills of Lading, Food Requests for WFP, and many others. Pre-Receive allows you to see what is expected to enter your inventory soon.</i></p> <p><i>Receiving Wizard - Allows you to receive items that do not have prior notice, that is, you have no Pre-Receive. Once an item is received, it appears in the Current Inventory.</i></p>	

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20	The Review menu is next. You use this menu to look at the data, such as when you are checking Current Inventory. CTS allows you to filter, or sort, the data in different ways. The drop-down panel contains 13 sub-menus, but you will not use some of them. The ones you will access most often are – Pre-Receive Summary, Receive Summary, Dispatch Summary, Current Inventory, Cycle Count Wizard etc.,	
21	Next is the Reports menu. This is where you access various reports mostly in Excel format,. There are over 29 reports available under Report menu. Your Country Office management will select the reports that are applicable to the programs and inventory relevant to you. Filters are available in the reports that allow you to find specific information.	
22	Configure is the next menu available for the User. There are 3 sub-menus available – Configuration, Detail Drop Downs, and Report Builder. The main reason you access configuration is to update the time zone to match yours. Detail Drop Downs is reserved for higher level users. Report Builder is the one you will use the most. It allows you to create custom reports in the system based on your specific requirements.	
23	The final menu is Home, which contains 5 sub-menus – About, Change Password, Contact Us, Consolidated Login, and Home. About tells you which version of the software you are using on your system. Change Password was covered earlier in this module. Consolidated Login allows you to access several locations using the same login and password, if you have authorization to do so. Home is used in other screens to return you to the Main Menu page.	
24	Contact Us is a link to the software manufacturer, and should not be used. If you have questions or need help, you can contact the CTS Project Team through the link located on the Main Menu page.	
25	Here are a couple of things to be careful about as you are moving around in CTS. If you are used to using the web, you may automatically click the forward and back arrows on your browser. Watch out! As you are moving around in CTS, do not use the browser arrows when you are in CTS. Any time you are in a sub-menu screen, you must use the “Next Step” or “Previous Step” buttons to back or forward. If you use the arrows at the top of your web browser, you will lose all of the information you have entered. If there is not a “Next Step” or “Previous Step” button on the CTS screen, use Home in the Home menu to return to the main menu.	
26	Another watch-out is the timeout. For increased security, CTS has an automatic timeout	

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	function. If the system is idle for 20 minutes, you will be logged out of the system. Any data you entered but did not processed will be lost and you will have to enter it again. So, when you begin entering data, it is important to complete the entries before you go away from the computer. Also, remember that the data is not saved until you finish the process. If you leave the form for any reason, the data you have entered will be lost.	
27	Before you continue to the next section, review what you have just learned about the menus. Click “Review” to begin.	
28	<i>Section Review</i>	
29	<b>Section 4: Some Helpful Features</b>	
30	The CTS system is not difficult to use, and as you become more familiar with it, you will appreciate all that it can do. As with all software, there are some helpful features you need to be aware of, and there are some things to be careful about so you do not lose your data.	
31	When you first log in to the system, a warning window may pop up. Don't be concerned. This warning is a very helpful feature that will help you manage inventory better. A warning window alerts you to potential issues with the inventory, such as items that are close to their Expiry Dates or that are under to their minimum set limits and need to be re-ordered. If you see a warning screen, make a note of the issue. Then, click Close to clear the warning and continue. Be sure to share the noted issues with your manager or others who may need to know about them.	
32	As you go through each menu screen, you will notice that some fields have a star or asterisk beside them. These are mandatory fields, which mean that you must enter information into them. CTS will not let you continue to another page until all mandatory fields are filled. This is a useful feature because it helps you make sure that all critical information is entered into the system.	
33	Another helpful feature is translation. If you are working in the system and English is not your first language, CTS has a way to help. At the bottom right of each page you will find a translation button. Click the arrow next to the language field and you will find a list of more than 30 languages. Choose the language you would like then click the forward button on the translator and the page will be translated into your language. As you move through CTS, each page will be translated for you.	

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34	Getting around CTS is not difficult at all, especially if you remember about some of the helpful features and the watch-outs. Before you continue to the next section, review what you have just learned. Click “Review” to begin.	
35	Another very important and helpful feature of CTS is the Catalog. The Catalog contains a master list of all inventory items and the associated details you need when you enter these items into CTS. The CTS Project Team has worked hard to make sure the Catalog has a complete list of the commodities that we handle at CARE, and they update it as needed.	
36	When you receive an item into inventory, you do not need to type it into the system. Instead, you select the item from a Catalog list. This saves you time, and it also helps ensure accuracy and consistency. You can see the Catalog through Categories under Review Menu that is “behind” CTS. You can also see it through the submenus within the Start menu.	
37	The Catalog is organized in a hierarchy, which simply means that you can search for items using larger category types first. This makes it easier to find the items you want. The items are organized by category type first, then the main category, and finally the sub-category.	
38	The 5 category types used for the catalog are Food, Fleet, Health and Pharma (or pharmaceuticals), Non-Food Items, and Office Supplies.	
39	Inside each category type are main categories, and under each of those are sub-categories. There are multiple main categories, and even more sub-categories. Again, this pattern is set up to help you find items more easily. Tip to handle catalog to find an item easily is to download the catalog file through Review, Categories and export to Excel, where you can easily search an item you want through filter or through Search	
40	Let’s look at an example. Under our Food category we find a number of Main Categories, such as Flour, Whole Grains, Broken Grains, Pulses, Oils and Fat, CSB, Sugar, and Salt. Under CerealWhole/Broken Grains, we find the sub-categories Sorghum, Maize in 50kg bags, Maize in 25kg bags, White Maize, Yellow Maize, White Rice, and more. Under Pulses we find the sub-categories Yellow Split Peas, Lentils, Green Whole Peas, and others.	
41	The pattern will be the same for any of the 5 Category Types. Since the information is already in the CTS system, all you have to do is find the main category and sub-category you need using the appropriate drop down menu and click on it. That information will automatically fill in for the	

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	Purchase Order or Project you are working with.	
42	You cannot edit any of the information in the Catalog. However, if you cannot find an item, or something new is being donated or requested, you may ask the CTS Project team to add it to the Catalog. Get your manager's approval first, and then send your request to the team at the address shown on screen.	
43	Before going to the next section about data, inputs, and outputs, click on Review for a brief check of what you have learned.	
44	<i>Section Review</i>	
45	<b>Section 5: Data, Inputs, and Outputs</b>	
46	The data, inputs, and outputs you work with in CTS are the same that you use every day in your job. They are the information that documents the flow of commodities through the supply chain, from supplier to the warehouse to distributor to the program or beneficiary. Each step through the supply chain has its associated documents.	
47	Up to this point, you have been entering detail from these documents into individual Excel or Word files. Now these details will be entered into CTS. And CTS will allow you to produce reports that you can print or send electronically so CARE management and donors can get the information they need much more quickly and making your job easier.	
48	You will have many types of input documents. These include purchase requests, purchase orders, call forward, and bills of lading for Pre Receive and Receiving, as well as waybills for Receiving. When you are working in Dispatch, you will most often use shipping documents, delivery notes, or waybills. In addition, the loss adjustment report is used for Cycle Counts, as well as any other area where adjustments must be made in the system.	
49	Other inputs you may need are quantities good, quantities damaged, or quantities lost, the person receiving, as well as the Project Number, Fund Code, and/or the Activity Sub Analysis.	
50	CTS also gives you a variety of options for output documents. These are reports that eventually go to the country office, CARE USA, donors, or other entities. Some of the reports are listed on screen. They can be accessed through the Review menu or the Report menu. You can also	

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	export the data to Excel, PDF, or other formats.	
51	When entering data, you will see some terms that may not be familiar to you. Sometimes a word may be confusing because there are many words for a given activity, and CTS does not use the one that you use in your office. For instance, CTS uses the word “dispatch,” and “ship.” They are the same in CTS. To put it simply, to dispatch an item is to ship it to a particular location.	
52	Some terms relate to inventory practices that may not be familiar to you. For example, “cycle count” is used for the practice of counting of a small part of the inventory at a specific time, on a regular schedule. Cycle count allows the operation to continue with as little interruption as possible, but still gives an accurate count of how many of a specific item is available. Cycle count is different than physical inventory, which is where the entire inventory is counted at one time.	
53	Other terms relate to the computer or the navigation of the CTS. We use the term “filter” when we want to search for specific information. Because everything is now entered electronically into CTS, it is much easier to search for items. By using filters, you can tell the program different attributes of the item you are looking for to narrow the search. For instance, you can search using a particular period, such as the last week or two weeks, for a particular Project Number, for the Fund code, or even a particular main category or sub-category. Filters speed up the search process.	
54	As you gain experience with CTS, you will find you will become more efficient and accurate when inputting the data. As a result, the outputs from CTS will be more reliable and useful to management as they make decisions about the inventory you are tracking. Before you leave this module and go Module 3, take a moment to check what you have learned about Data, Inputs, and Outputs. Click “Review” for a self-check of what you learned.	
55	<i>Section Review</i>	
56	<i>Section Review</i>	
57	<b>Section 5: Conclusion</b>	
58	The Commodity Tracking System is an innovation that will help make CARE be more accountable and efficient in its work. It will give us better information, and it will help you, the user, make more effective use of your time. Now that you have gone through Getting Started	

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	with CTS, it is time to find out how CTS works with your everyday tasks. The next module, The Basics of Entering Data, will give you the “how-to” of using CTS.	
59	The training you are now taking is designed to help you become familiar with CTS and learn how to make it work for you. But if you need help, the CTS Project Team is available. If you have questions or comments or need help, simply email the team at the address shown on screen.	