Inventory Management and Tracking System

Frequently Asked Questions

System Information

Getting Started with IMATS

Technical Questions

Functional Questions

Inventory Management and Tracking System

Data Exchange Questions

System Reports Questions

Training Resource Questions

Other Questions

System Information

1. What is IMATS?

CDC's Inventory Management and Tracking System (IMATS) is one of four interoperating applications of the Countermeasure Tracking Systems (CTS) program. IMATS is a secure web-based software application developed to manage information regarding medical and non-medical countermeasures. IMATS provides the capability for tracking quantities and locations of medical and non-medical countermeasures and helps to strengthen the capacity of all levels of public health to manage inventory and distribution of countermeasures during daily operations or an emergency response event.

CDC's IMATS is available free of charge, to any state, locality, or territory interested in using the system.

2. What is IMATS Connect?

IMATS Connect is the "offline" version of IMATS software available for state and local users to download, install, and maintain on their own servers. It is identical in functionality to IMATS. Each state or local organization deploying IMATS in this manner must assume responsibility for the security of both the IMATS application and the data contained in the IMATS database. Furthermore, each organization must agree to notify CDC of their use of IMATS Connect and must agree not to redistribute IMATS Connect without acknowledging the CDC origin of the software.

3. **How was IMATS developed?**

Applying innovative, user-centered design methods, the CTS team incorporated user feedback throughout each stage of system development, ensuring IMATS will meet user needs, including preferences, goals and business objectives. To accomplish this, the CTS team engaged state and local partners from across the nation in a number of ways, including:

1. Online, virtual focus group meetings
2. Technical requirements gathering webinars
3. System demonstrations
4. In-person user experiences and usability workshops
5. Conference presentations

This collaborative effort with state and local end users ensures IMATS is intuitive, simple to use and will meet your needs.

4. **I already have an inventory management system at my state. Do I still need to use IMATS?**

You are free to continue using your existing inventory management system as your primary system. In this case, you may consider using IMATS as your backup system. For those wishing to continue using their existing inventory management systems, a bi-directional data exchange capability is available for states to report inventory data from existing systems to CDC during an event. Information about this capability can be found in the Inventory Data Exchange Specification available on the IMATS webpage under Supporting Information.

5. **What innovative features does IMATS have which makes it different from other systems?**

IMATS includes the following innovative features:

- Maintaining visibility of inventory (i.e., what is available and on-hand at all levels)
- Identifying point of dispensing facilities where product is shipped (i.e., hospitals, county health departments, etc.)
- Determining how much of the product is distributed to the point of dispensing location
- Facilitating warehouse operations including receiving, shipping, and storing of inventory
- Capability to import current inventory and storage locations from existing systems

6. **How much will IMATS cost my state or locality?**

IMATS is available free of charge for any jurisdiction. Furthermore, IMATS depends only on free or open source software in order to reduce costs. CDC plans to maintain and further develop the system going forward. Future system updates and releases are currently being planned.

Getting Started with IMATS

7. **How do I get started using IMATS?**

   To start using IMATS, first you will need to evaluate the system to see if it is right for you. To do so, send an email to **ctshelp@cdc.gov** to gain access to a testing instance of IMATS.

   In the email, please list up to five (5) names and email addresses for IMATS evaluators in your organization. When selecting evaluators, we recommend including technical and/or logistical experts and other key decision-makers who are able to provide considerable input into determining if IMATS is a good fit for your organization.

   Next, evaluate the system to see if it meets your jurisdiction's specific needs. If you like what you see, the next step is to implement the system and start using it!

8. **What is CDC's SAMS (Secure Access Management Services)?**

   Secure Access Management Services (SAMS) is an access management system that is designed to provide secure access to applications within the CDC environment. SAMS will function as the "front door" authentication gateway to IMATS as well as the other CTS applications.

   As a government agency, CDC is bound by federal law that dictates specific information security rules and processes that must be followed. In accordance with federal requirements, CDC has implemented safeguards to protect the data in its possession and the people and organizations that this information represents. These safeguards include the following:

   1. Authentication: Every individual system user must be uniquely identified (i.e., no two people may share a user ID). CDC must verify each user is actually the person they claim to be. This is called *Identity Proofing* and must be done before granting access to applications or to functionality within any system. This ensures every action is correctly attributed to the person performing it.

   2. Authorization: Once a user has been authenticated, SAMS will ensure that users are only allowed access to systems or functionality to which they have explicitly been approved.

9. What do I need to do to register with SAMS?

To begin the SAMS sign-up process, send an email to **ctshelp@cdc.gov** mentioning that you are interested in gaining access. The five easy steps in the process are listed below, or you may refer to the SAMS User Guide.

1. You will receive an email invitation from SAMS inviting you to register. Log into SAMS with your username (email address) and a temporary password provided to you in the SAMS invitation email.

2. Change the password, accept the SAMS 'Rules of Behavior', and respond to the registration questions.

3. SAMS will send you an email confirmation and a pre-populated identity verification form.

4. Print out the identity verification form and take it to a notary public or Designated Proofing Agent[1] with an appropriate government-issued ID (i.e., driver's license) for verification.

5. Once verified, mail or fax the endorsed identity verification form and copies of your identity document and supporting documentation to the CDC Proofing Authority who will notify you if additional information or clarification is needed.

Once approved, you will receive welcome emails from SAMS and the CDC Proofing Authority. You're now ready to access your applications.

10. Do I need to complete identity verification in SAMS in order to evaluate IMATS?

No. Those who wish to evaluate IMATS prior to adopting the system do not need to complete identity verification in SAMS. Once users have completed the evaluation process and decide to move forward with system adoption, they will begin the SAMS identity verification process for access to IMATS.

Technical Questions

11. Are user defined fields available within IMATS?

IMATS does not currently have blank fields that the user can use at their discretion (user defined fields) available.

12. Is it possible to create locations with sub-locations in the warehouse? Can locations within IMATS be named?

It is possible for users to name locations in IMATS. The system also includes a feature to add a range of locations that includes multiple levels. For example, if you have rows of shelving in your warehouse, users can utilize the levels to create locations such as 1A3C (Row 1, Section A, Shelf 3, Space C)

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[1] A Designated Proofing Agent is an individual authorized to conduct in-person identity verification at a city, county, or state health department or community-based organization (CBO) without using a notary public

13. **Will IMATS be capable of bar coding? Will it incorporate readers and hand-held scanners?**

In the future, a solution that incorporates bar code scanning capabilities using handheld terminals or other mobile devices will be integrated into IMATS.

14. **Where is the server for IMATS located? Will it be our local server?**

For the initial deployment, IMATS servers will reside in a CDC hosting center. Users will access IMATS via the internet and connect to CDC servers with SAMS security credentials. In the near future, CDC will provide the capability to host IMATS on non-CDC servers if the jurisdiction has the means to procure and support the necessary hardware and software.

15. **Is IMATS Cloud based?**

IMATS is a web application that uses modern technology. It has a cloud-friendly architecture and can be deployed to virtual machines. If you have specific requirements regarding technology, tools, or hosting, please contact **ctshelp@cdc.gov** and we can schedule a time to discuss your specific needs.

16. **What are the system requirements to run IMATS?**

To run IMATS properly, you will need one of the following:

- Microsoft Internet Explorer Web browser version 8.0 or higher (with cookies and JavaScript enabled)
- Mozilla Firefox Web browser version 3.5 or higher (with cookies and JavaScript enabled)

To generate reports, you will need one of the following, depending on your particular preferences:

- Adobe Acrobat Reader version 8.0 or higher to view reports as PDF documents
- Microsoft Excel version 2007 or higher to view reports in spreadsheets

Functional Questions

17. **What is the system capacity of IMATS? Will IMATS be able to accommodate unusually high usage during an emergency event?**

CDC is committed to ensuring IMATS is available and usable during a major public health event. With this goal in mind, CDC program and technical staff have performed initial capacity planning for IMATS. The plan addresses routine and non-routine usage. This plan will be reviewed periodically and any necessary adjustments in capacity will be made. If you have specific information about numbers of PODs and numbers of users, please relay that information to **ctshelp@cdc.gov** so that it can be incorporated into the IMATS capacity planning process.

18. **Will IMATS have the ability to transfer inventory from one facility to another?**

IMATS allows users to move items from one storage location to another storage location within a facility. However, the system does not provide the capability to allow users to move assets from one facility to another facility.

19. **Will state/locals have to input anything when receiving products?**

Yes. Any identifying data will need to be entered into IMATS, including lot number and expiration date.

20. **Will CDC ask for specific products within a warehouse?**

Yes. During an event, CDC will request, by facility, on-hand inventory counts for an event-specific set of products. For project areas that use IMATS exclusively, the report of products can be generated in IMATS via the Inventory Data Exchange function. Users can then review and submit the requested information to CDC.

21. **What happens if the system goes down?**

For the CDC-hosted version of IMATS, CDC has provided for a Disaster Recovery (DR) mechanism. This solution provides a backup data center that can be activated upon detection of an outage in the primary data center. Data stored in the primary data center will be transferred to the backup data center. Users will automatically be routed to the backup data center where they can resume normal operations.

22. **What support will we need if we choose to use this system?**

If you choose to use IMATS hosted at CDC, there is no cost for hardware, software, or technical support. If you choose to host IMATS outside of CDC, your jurisdiction will need to procure and support the necessary hardware and software. If you have questions about hardware and software required to host IMATS, please contact **ctshelp@cdc.gov**.

23. **Does CTS Help provide a 24/7 help line for assistance during a public health response/emergency?**

CDC is committed to providing the support necessary during a public health event. The needs of each event will be assessed and essential support and information will be provided to assist with use of IMATS. The PHIN Help Desk (**phintech@cdc.gov**) and CTS Help inbox (**ctshelp@cdc.gov**) are available to respond to questions and requests for technical assistance related to IMATS. Outside of an event, the PHIN Help Desk and the CTS Help inbox are available Monday through Friday, 8am-5pm ET (excluding federal holidays). If your jurisdiction is planning for an exercise or drill that will include the use of IMATS, please inform us by sending an email to **ctshelp@cdc.gov** so we can make accommodations to provide necessary assistance and ensure system availability.

24. **How can I train staff in IMATS without altering my live data?**

The IMATS Training environment can be used to conduct trainings and exercises with the system without having to use or modify live data. IMATS Training is identical in functionality to IMATS. All users approved for access to IMATS are automatically approved for access to IMATS Training. No additional identity proofing steps are needed.

25. **Who can I contact for help if I have a problem?**

Should you have any questions please contact us at **ctshelp@cdc.gov** or the PHIN helpdesk at **phintech@cdc.gov**.

Data Exchange Questions

26. Will IMATS have the ability to import an exported Excel file, for example, from another system rather than manually entering each individual line item?

IMATS includes an import function that allows facilities to upload data, such as storage locations and current inventory. Other items which may be imported include suppliers, products and unit of measure. There are no export capabilities in IMATS today.

27. Will inventory data be viewable from federal or state level to the local level and vice versa?

Inventory data may be viewed from the federal and state levels down to the local level. However, data may not be viewed from local levels up to the state level.

28. Will IMATS have the ability to receive inventory from the Strategic National Stockpile that is not included in a push package file (i.e., managed inventory)?

Unlike the electronic push package file which can be imported directly into your inventory, managed inventory in IMATS will need to be receipted like other assets.

29. Is there a way to report inventory counts to CDC if I don't use IMATS?

The Inventory Data Exchange (IDE) functionality enables CDC Public Health Emergency Preparedness (PHEP) cooperative agreement-funded project areas to report on-hand information from existing inventory management systems (i.e., non-IMATS users) to CDC.

During an event, project areas that do not plan to use IMATS as their primary inventory tracking system will send inventory data to CDC via the Inventory Data Exchange (IDE) mechanism detailed in the IDE specification document. Through this process, project areas will receive request messages from CDC and send report messages back to CDC. An electronic copy of the current version of the IDE specification document and the IDE participation form is available for download on the SNS SharePoint site and on the IMATS web page under "Supporting Information".

System Reports Questions

30. Can reports be exported in Excel format?

All reports are available in both PDF and Excel formats. Data in reports generated in Excel can be manipulated as needed for further analysis by the user.

31. Will the system generate ad-hoc reports to improve timing?

Reports currently available in IMATS are the Count Inventory and Audit Trail Reports. The Count Inventory Report provides quantity of inventory on hand and quantity allocated for selected products for the current time as well as total quantity requested, received accepted, received rejected and shipped for a range of selected dates. The Audit Trail Provides information about completed warehouse tasks based on certain main criteria: storage location, user, order, and dates. IMATS does not currently support ad-hoc reports. This functionality, however, can be obtained by exporting data to Excel or SAS. We are continually adding additional report capabilities and would appreciate feedback on types of reports that are needed by your jurisdiction.

Training Resource Questions

32. Do you have training resources available for me to reference?

The best way to interact with and learn more about IMATS is through the IMATS Evaluation environment (see FAQ no. 2, *"How do I get started using IMATS?"* for instructions on how to gain access). If you have questions during your daily use, there is an extensive online help system available on-demand. With each future system release, the online help will be maintained and updated to reflect current system features, tools and processes. Documentation on system setup and basic tasks as well as an IMATS training demonstration can be found on our webpage, **http://www.cdc.gov/phin/tools/imats**.

Other Questions

33. What are the requirements to be a beta tester?

Our beta testing period is over; however if you'd like to evaluate the system; please send an email to **ctshelp@cdc.gov** to gain access to a test instance of IMATS.

34. Will CDC ask for local data?

CDC will not ask for local data. During an event where reporting is required, CDC will only ask for aggregated information that does not have personally identifiable data from the state level.

When necessary, jurisdictions will be able to transmit to CDC the name, type and zip code of each facility where inventory is located via the IMATS on-hand inventory count data exchange file.

35. Is there a patient tracking component within the inventory system?

The purpose of IMATS is to track and manage medical and non-medical countermeasure inventory and supplies. The Countermeasure and Response Administration (CRA) system provides capabilities for individual and aggregate level tracking, which may include dispensing of pharmaceuticals, dispensing of medical materials, and vaccine administration. Both IMATS and CRA are components of a suite of tools for CDC's Countermeasure Tracking Systems (CTS). For more information on CRA, contact **CRAHelp@cdc.gov** or visit **http://www.cdc.gov/phin/tools/cra**.