



## Inventory Management and Tracking System

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## System Information

### 1. What is IMATS?

CDC's Inventory Management and Tracking System (IMATS) is one of four applications that comprise the Countermeasure Tracking Systems (CTS) program. IMATS is a secure Web-based software application developed to manage information regarding medical countermeasures. IMATS provides the capability to track quantities and locations of medical countermeasures. IMATS helps to strengthen the capacity at all levels of public health to manage their inventories and distribution of countermeasures, whether during daily operations or an emergency response event.

CDC's IMATS is available free of charge to any state or local public health department interested in using the system. For more information on IMATS, send an email to [ctshelp@cdc.gov](mailto:ctshelp@cdc.gov).

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## 2. What is “IMATS Connect”?

IMATS Connect is the version of IMATS software available for state and local public health users to download, install, and maintain at their organization. It is similar in functionality to IMATS but is not hosted at the CDC and therefore does not require the same authentication process for access. Each state or local public health department deploying IMATS in this manner must assume responsibility for the enrollment process and security of both the IMATS application and the data contained in the IMATS database. Furthermore, each organization must agree to notify CDC they are using IMATS Connect and that they agree not to redistribute IMATS Connect without acknowledging the CDC origin of the software.

## 3. How was IMATS developed?

Several large-scale public health emergency responses revealed the need to improve countermeasure inventory management and distribution tracking at all levels of public health. CDC’s Countermeasures Tracking System (CTS) team responded by developing an innovative inventory tracking system that was reliable, timely, and easy for public health departments to adopt and use. At the very beginning of the IMATS development process, the CTS team implemented and emphasized the use of user-centered design methods. The CTS team incorporated user recommendations and suggestions into each stage of system development. The team sought to ensure that IMATS met users’ most important requirements so it would be a valuable tool that could significantly help them meet their inventory management, operations, and business goals. To accomplish this, throughout each stage of IMATS development and testing the CTS team engaged with state and local partners from across the nation. Partner involvement was achieved in a number of ways, including through:

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1. Virtual focus-group meetings held online
2. Webinar gatherings to identify technical requirements
3. System demonstrations
4. In-person user try-out sessions and usability workshops
5. Conference presentations

This collaboration with many of the actual end-users at state and local public health departments was enormously important to the development team. This interactive partnership was critical to ensuring that IMATS meets or surpasses real-world inventory management needs, and that using it is intuitive and simple to learn.

## **4. My state already has an inventory management system. Are we required to use IMATS?**

No. In this case, you might want to continue using your existing inventory management system as your primary system and use 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 emergency response event. Information about this capability is in the Inventory Data Exchange Specification document on the IMATS Webpage (<http://www.cdc.gov/cts/imats>) under Supporting Information.

## **5. What are some of IMATS' innovative features?**

IMATS gives users the capability to:

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- Maintain visibility of inventory (i.e., what is on-hand at all public health department levels)
- Identify point-of-dispensing facilities to which product is shipped (i.e., hospitals, county health departments, etc.)
- Determine how much of the product is distributed to the point-of-dispensing location
- Facilitate warehouse operations including inventory receiving, shipping, and storing
- Automate the requesting, picking, shipping and receiving processes between warehouses using IMATS.
- Import data from existing inventory control systems

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

IMATS is available free of charge for any public health department. Each public health department user must complete Secure Access Management Services (SAMS) identity proofing in order to receive access to IMATS. IMATS uses only free or open source software in order to reduce costs. CDC maintains and continually enhances the system and regularly releases updated versions.

## **7. How often is IMATS updated and a new version released?**

There are many factors that affect releasing a new version of IMATS. Because of this, we do not have a set timeline for future releases. The CTS team continually analyses and prioritizes requests received from users. It may be possible for us to provide the version of IMATS in which a particular enhancement will be included. If you have any suggestions or requests for enhancements, please send them to [ctshelp@cdc.gov](mailto:ctshelp@cdc.gov).



## Getting Started with IMATS

### 8. How do I get started using IMATS?

If your state, region, and/or locality is interested in conducting an evaluation of IMATS for potential adoption, please contact the CTS team. This evaluation will provide you with an opportunity to review all the inventory management features available in IMATS. Below are steps to help you get started:

1. Choose up to five persons to participate in the evaluation and send an email to [ctshelp@cdc.gov](mailto:ctshelp@cdc.gov) stating their names and email addresses.
  - The CTS team recommends you include technical and/or logistical experts and other key decision makers who are able to provide fact-based input into determining if IMATS is a good fit for your public health department.
2. The CTS team will provide you with access to the evaluation system for your 30-day trial (depending on usage, longer evaluation periods may be requested).
  - Secure Access Management Services (SAMS) authentication is not required for evaluation of IMATS.
3. Once you have completed the evaluation period and decide to move forward with system adoption, send an email request to [ctshelp@cdc.gov](mailto:ctshelp@cdc.gov).
  - The SAMS authentication process for access to IMATS will then begin.



## Technical Information

### **9. What are the browser requirements needed to use IMATS?**

Microsoft Internet Explorer Web Browser version 10.0 or higher is recommended (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

### **10. What security measures are in place to protect the data that are submitted to CDC?**

As a government agency, CDC is bound by federal law that dictates specific information security rules and processes that must be followed. To comply with these rules, CTS applications use the CDC Secure Access Management Services (SAMS) system for electronic authentication. SAMS provides secure access to applications within the CDC environment and functions as the authentication gateway to IMATS. SAMS is the next-generation replacement for CDC's legacy Secure Data Network (SDN) portal and does not use digital certificates. For more information, please refer to the SAMS FAQs (<https://auth.cdc.gov/sams/samsfaq.html>).



## **11. What is the system capacity of IMATS? Can IMATS accommodate unusually high use, such as 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 use. This plan will be reviewed periodically and 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](mailto:ctshelp@cdc.gov) so that it can be incorporated into the IMATS capacity planning process.

## **12. What happens if the system goes down?**

For the CDC-hosted version of IMATS, CDC has a Disaster Recovery (DR) solution. This solution is a backup data center that will be activated upon detection of an outage in the primary data center. Data stored in the primary data center will be available in the backup data center, and user requests will automatically be routed there. When the primary data center is available again, the latest data from the backup data center will be transferred to the primary data center, and normal operations will resume. CDC will fully manage activation of the DR solution and the transition back to the primary data center. Users will likely be unaware of the changes as they occur.

## **13. What technical support will we need if we choose to use IMATS?**

If you choose to use IMATS hosted at CDC, there is no cost for hardware, software, or technical support. If you choose to use IMATS Connect, your public health department 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](mailto:ctshelp@cdc.gov).



## **14. Where is the IMATS server located?**

The servers for the CDC-hosted version of IMATS reside in a CDC data center. Users access IMATS via the internet and connect to CDC servers by logging in with their SAMS security credentials. Soon, CDC will provide the capability for public health departments to host IMATS themselves. This option is called IMATS Connect (see FAQ No. 2 for more information about IMATS Connect). Public health departments using IMATS Connect must buy and support the necessary hardware and software.

## **15. Is IMATS cloud based?**

No. IMATS is a Web application that uses modern Java technology. It has a cloud-ready architecture that is designed to be deployed to virtual machines. If you have specific requirements regarding technology, tools, or hosting, please contact [ctshelp@cdc.gov](mailto:ctshelp@cdc.gov), and we will schedule a time to discuss your specific needs.

## Functional Information

### **16. Are user-defined fields available within IMATS?**

No. IMATS does not currently have available blank fields (user-defined fields) that users can use at their discretion.

### **17. Will IMATS accept the use of product-location names? For warehoused product, can we use IMATS to create location names that include sub-locations?**

Yes, users enter location names into IMATS. The system also includes a feature to generate location ranges that designate multiple levels. For example, if you have rows of shelving in your warehouse,

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you can enter level designations to generate specific locations, such as 1A3C (Row 1, Section A, Shelf 3, Space C). This feature can significantly reduce data-entry time for product stored in large warehouses having many possible location levels.

## **18. Can IMATS be used for bar coding? Can it communicate with readers and hand-held scanners?**

Not yet. In the future, a solution that incorporates the capability to use mobile devices for bar-code scanning will be integrated into IMATS. The CTS team is investigating the use of bar codes and bar-code scanners with mobile devices.

## **19. Can IMATS be used to track inventory transfers from one facility to another?**

Yes. IMATS provides the capability for users to track the movement of assets from one facility to another facility so users can avoid going through the request, pick, ship, and receipt process. IMATS also allows users to move items from one storage location to another storage location within a facility.

## **20. Do public health departments have to input any information when receiving products?**

Yes. All identifying data must be entered into IMATS. This includes pharmaceutical's lot number and expiration date and non-pharmaceutical's serial number and size.



## **21. Is there a patient tracking component within IMATS?**

No. The purpose of IMATS is to track and manage medical and non-medical countermeasure inventory and supplies, not patients. The Countermeasure and Response Administration (CRA) system provides capabilities for detailed and aggregate-level patient or individual tracking, which may include dispensing pharmaceuticals or medical materials, or administering vaccines. 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](mailto:CRAHelp@cdc.gov) or visit <http://www.cdc.gov/cts/cra>.

## Data Exchange Information

### **22. Can IMATS import an Excel file that is exported from another system, so no one has to manually enter each individual line item?**

Yes. IMATS includes an import function that allows users to upload data, including storage locations, suppliers, products, users, facilities, purchase orders, and current inventory. Files may be in tab or pipe delimited text files for import. All data that can be imported can also be exported from IMATS.

### **23. Who will have access to my IMATS data?**

Authorized users who are assigned to your facility or facilities can view and edit the data on the basis of their role and permissions. Additionally, state-level Public Health Administrators will have access to all state data.



**24. Can IMATS receive inventory information from the Strategic National Stockpile that is not included in a push package file (i.e., managed inventory)?**

Unlike the electronic push package file that can be imported directly into your inventory record, the use of IMATS requires that managed inventory be received for, as is required for other such assets.

**25. How do I report inventory counts to CDC if I don't use IMATS?**

During an emergency response event, project areas not using IMATS as their primary inventory tracking system will instead send inventory data to CDC via the Inventory Data Exchange (IDE) mechanism, which is described 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 IMATS Web page under "Supporting Information."

**26. If I use IMATS, will CDC ask me for information about specific products?**

During a response event, CDC might request on-hand inventory counts by facility for a specific set of products. For project areas that use IMATS exclusively, product reporting is automatically generated via the Inventory Data Exchange function. These users can review the generated reports and submit requested information to CDC.



## System Reports

### **27. Can I use IMATS to export reports in Excel format?**

Yes. 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.

### **28. Can IMATS generate *ad-hoc* reports to improve timing?**

No. IMATS does not currently support making *ad-hoc* reports. This functionality, however, can be obtained by exporting data to Excel or SAS. Reports currently available in IMATS are the Count Inventory and Audit Trail Reports. The Count Inventory Snapshot Report provides quantity of inventory currently on hand and quantity allocated for selected products. The Count Inventory Detail Report is available for a range of selected dates and selected products and displays total quantity requested, received accepted, received rejected, and shipped. The Audit Trail Provides information about completed warehouse tasks on the basis of these primary criteria: storage location, user, order, and dates. We are continually adding report capabilities. We would appreciate knowing the types of reports needed by your public health department.

## Training and Support

### **29. Do you have training resources for me to reference?**

The best way to interact with and learn more about IMATS is through the IMATS Evaluation environment (see FAQ No. 7, "*How do I get started using IMATS?*" for instructions on how to gain access). If you have questions during your daily use, an extensive online help system is available on-demand. With each system update, the online help information is updated to reflect current system

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features, tools, and processes. Documentation on system setup and basic tasks is at our Webpage, <http://www.cdc.gov/cts/imats>.

## **30. Does CTS Help provide a 24/7 helpline for assistance during a public health 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 using IMATS. The SAMS Help Desk ([samshelp@cdc.gov](mailto:samshelp@cdc.gov)) and CTS Help inbox ([ctshelp@cdc.gov](mailto:ctshelp@cdc.gov)) are available to receive questions about IMATS and requests for technical assistance. During non-event operations, the SAMS Help Desk and the CTS Help inbox are monitored Monday through Friday, 8 a.m.-5.p.m. Eastern Time (excluding federal holidays). If your public health department 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](mailto:ctshelp@cdc.gov). We will make accommodations to provide requested assistance and to ensure system availability.

## **31. How can I train staff to use IMATS without altering my live data?**

The IMATS Training environment can be used to conduct training 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 required.

## **32. Who can I contact for help if I have IMATS questions?**

Should you have any questions please contact the CTS team at [ctshelp@cdc.gov](mailto:ctshelp@cdc.gov) or the SAMS helpdesk at [samshelp@cdc.gov](mailto:samshelp@cdc.gov). They are monitored Monday through Friday, 8 a.m.-5.p.m. Eastern Time (excluding federal holidays).