**IMATS Live Site:** [**https://imats.cdc.gov**](https://imats.cdc.gov)

1. **Facility Update** 
   1. Click **Setup**
   2. Click **Facility**
   3. Click **Search Facilities** *(To quickly access all facilities do not put anything in the search fields)*
   4. Click **Search**
   5. Review the facilities
      * Edit or Delete by clicking on the facility name
      * Add additional facilities by going to **Setup, Facility, Add Facility**
      * Reminder when adding a facility you must also add a storage location to that facility by going to **Setup, Facility, Add Storage Location**

* *References*
  + - *Refer to the following sections below or in the IMATS Manual*

[***Search/Edit Facility***](#Search_Facility)

[***Add Facility***](#Add_Facility)

[***Add Storage Location***](#Add_Storage)

1. **User Update** 
   1. Click **Setup**
   2. Click **User**
   3. Click **Search Users** *(To quickly access all users do not put anything in the search fields)*
   4. Click **Search**
   5. Review the users
      * Edit or Delete by clicking on the user name
      * Add additional users by going to **Setup, User, Add User**

*(Note: Users must have been approved in SAMS before they will have access to the system)*

* *References*
  + - *Refer to the following sections below or in the IMATS Manual*

[***Search/Edit User***](#Search_Users)

[***Add User***](#Add_User)

1. **Inventory Update** 
   1. Click **Inventory Management**
   2. Click **Inventory**
   3. Click **Search Inventory** *(To quickly access all inventory do not put anything in the search fields)*
   4. Click **Search**
   5. Review the inventory
      * Edit or Delete by clicking on the inventory item name
      * Add additional users by going to **Inventory Management, Inventory, Add Inventory**

* *References*
  + - *Refer to the following sections below or in the IMATS Manual*

[***Search/Edit Inventory***](#Add_Inventory)

[***Add Inventory***](#Add_Inventory)

**Data can be tracked on the administrative level in IMATS, so LHD does not need to submit anything.**

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| **SEARCH/EDIT FACILITY** | | |
| **1** | Select **Setup**, then **Facility** and then **Search Facilities**. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\1 - Facility\Facilities1.PNG |
| **2** | Choose the search criteria and enter the information into the corresponding field.  Click **Search** to continue. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\1 - Facility\Search Facilities1.png |
| **3** | If results are available they will display below the search criteria.  Choose the facility by clicking on the facility name.  *\*Note: If results do not display try searching without anything in the search box, this will return all available results.* | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\1 - Facility\Search Facilities2.png |
| **4** | Change Facility  To edit information for the facility change or add the information to the edit facility screen.  Click **Save** when complete.  A confirmation will appear when a facility has been successfully updated. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\1 - Facility\Search Facilities3.pngH:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\1 - Facility\Search Facilities4.png  H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\1 - Facility\Search Facilities5.png |

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| **5** | Delete Facility  Click **Delete** on the Edit Screen.  Confirm the delete by clicking **OK** on the pop up.  A confirmation will appear when a facility has been successfully deleted. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\1 - Facility\Search Facilities4.pngH:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\1 - Facility\Delete Facility2.png |
| **6** | **Error:** Facilities with users assigned to them cannot be deleted. The users must be removed from the facility before deleting. See [Search/Edit User](#Search_Users) for instructions. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\1 - Facility\Delete Facility1.png |

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| **ADD FACILITY** | | |
| **1** | Select **Setup**, then **Facility** and then **Add Facility**. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\1 - Facility\Facilities1.PNG |
| **2** | Complete the new facility fields.  \* Items are required  Click **Add** when complete. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\1 - Facility\Facilities2.pngH:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\1 - Facility\Facilities2a.png |
| **3** | A confirmation will appear when a new facility has been successfully added.  *\*Note: The added facility will be listed on the right and additional facilities can continue to be added.* | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\1 - Facility\Facilities3.png |

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| **ADD STORAGE LOCATIONS** | | |
| **1** | Select **Setup**, then **Facility**, and then **Add Storage Location**. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\1 - Facility\Facilities1.PNG |
| **2** | Complete the new storage location fields.  \* Items are required  Click **Add** to continue. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\1 - Facility\Add Storage Location1.png |
| **3** | A confirmation will appear when a storage location has been successfully added.  *\*Note: The added storage location will be listed on the right and additional storage locations can continue to be added.* | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\1 - Facility\Add Storage Location2.png |

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| **SEARCH/EDIT USERS** | | |
| **1** | Select **Setup**, then **User** and then **Search Users**. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\User1.PNG |
| **2** | Choose the search criteria and enter the information into the corresponding field.  Click **Search** to continue.  *\*Note: If results do not display try searching without anything in the search box, this will return all available results.* | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Search Users1.png |
| **3** | If results are available they will display below the search criteria.  Choose the user by clicking on their name. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Search User2.png |
| **4** | Change User Information  To edit information for the user change or add the information to the edit user info screen.  Click **Save** when complete.  A confirmation will appear when a user has been successfully updated. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Search User3.png H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Search User4.png |

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| **5** | Change User Role  To change the role of a user click **change role** in the **User Role** section of the **User Info** tab.  Use the drop down to select the new role to be assigned.  Click **Next** to continue.  Click the box next to the facility name that the user will be assigned to.  Click **Next** to continue.  Confirm the permissions for the user. Add or remove any by checking or unchecking the box next to it.  Click **Done** when complete.  A confirmation appears when the user role has been successfully changed. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Search User3.pngH:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Change User Role.png C:\Users\sharpm3\Desktop\Desktop 1-7-15\__CURRENT PROJECTS\_IMATS\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Search User6.pngH:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Search Custom Role6.png H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Change User Role - Confirmation.png |
| **6** | Change User Access  To edit information for the user’s access change or add the information to the **User Access** tab.  **Remove Facility:** To remove an assigned facility click the trash can next to the facility name.  **Add Facility:** To add an assigned facility click Configure Access, then click in the check box next to the facility name.  Click **Save** when complete.  A confirmation will appear when user access has been successfully updated. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Change User - User Access1.pngH:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Change User - User Access2.pngH:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Change User - User Access2a.pngH:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Change User - User Access3.png |
| **7** | Change User Permissions  To edit information for the user’s permissions change or add the information to the **User Permissions** tab.  **Remove Permissions:** To remove permissions click the trash can next to the permission name.  **Add Permissions:** To add permissions, click configure permissions to update, check the box for all permissions that will be added.  *\*Note: If no permissions are listed this means the user already has all of the permissions.*  Click **Save** when complete.  A confirmation will appear when user permissions have been successfully updated. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Search Users5.png H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Change User Role - Assign Permissions1.pngH:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Chagne User Role - Assign Permissions2.png |
| **8** | Inactivate/Activate User  To inactivate or activate a user use the **User Info** tab.  **Inactivate:** To inactivate a user click **Inactivate User**  **Activate:** To reactivate a user click **Activate User**.  A confirmation will appear when a user has been successfully inactivated or activated. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Search User3.pngH:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Inactivate User.png  Notice that this button changes depending on the user’s status.  Active Users - have a deactivate user button  Inactive Users - have an activate user button |
| **9** | Delete User  To delete a user click **Delete** on the **User Info** screen.  Confirm the delete by clicking **OK** on the pop up.  A confirmation will appear when a user has been successfully deleted. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Search User3.pngH:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Delete User.png |

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| **ADD NEW USER** | | |
| **1** | Select **Setup**, then **User**, and then **Add User**. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\User1.PNG |
| **2** | Complete the new user fields.  \* Items are required  Click **Next** to continue. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Add User1.png |
| **3** | Assign the user to a facility by clicking in the check box to the left of the facility name.  Click **Next** to continue. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Change User - User Access2.pngH:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Change User.png |
| **4** | Select the user permissions.  Click **Done** when complete. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Change User Role - Assign Permissions.png |
| **5** | A confirmation will appear when a new user has been successfully added.  *\*Note: The added user will be listed on the right and additional users can continue to be added.* | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\3 - Setup\7 - User\Add User3.png |

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| **SEARCH/EDIT INVENTORY** | | |
| **1** | Select **Inventory Management**, then **Inventory**, and then **Search Inventory**. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\1 - Inventory Management\9 - Inventory\Inventory1.png |
| **2** | Choose the search criteria and enter the information into the corresponding field.  Click **Search** when complete. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\1 - Inventory Management\9 - Inventory\Search Inventory1.png |
| **3** | If results are available they will display below the search criteria.  Choose the inventory items by clicking on the **Product Name, Item Number**. | *H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\1 - Inventory Management\9 - Inventory\Search Inventory2.png* |
| **4** | Change Inventory  To edit information for the inventory items, change or add the information to the edit inventory item.  Click **Save** when complete.  A confirmation will appear when the item has been successfully updated. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\1 - Inventory Management\9 - Inventory\Search Inventory7.png C:\Users\sharpm3\Desktop\Desktop 1-7-15\__CURRENT PROJECTS\_IMATS\In Progress Manual\New Screen Shots 11-19-14\1 - Inventory Management\9 - Inventory\Search Inventory8.png |
| **5** | Delete Inventory  To delete an inventory click **Delete** on the edit inventory item screen.  A confirmation will appear when an inventory item has been successfully deleted. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\1 - Inventory Management\9 - Inventory\Search Inventory7.pngC:\Users\sharpm3\Desktop\Desktop 1-7-15\__CURRENT PROJECTS\_IMATS\In Progress Manual\New Screen Shots 11-19-14\1 - Inventory Management\9 - Inventory\Delete Inventory.png |

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| **6** | Export Inventory  To export a list of inventory for the facility chosen click Export to Excel.  Click **Save** in the pop up.  *It is recommended to save to the desktop.*  *The file type is likely going to be unknown, so the file extension will have to be changed before it can be opened after saving it. It is recommended that the file is saved to the desktop, so that it is easier to make the change to the file extension that is needed to open the file.*  To change a file extension from the desktop, click the name part of the file once. This will highlight it and allow it to be edited.  Then change the .tsv to .xls and press enter.  A warning will appear, click **Yes** to continue.  The file will now be changed and should be able to be opened in Excel.  If a warning appears when opening the file, click **Yes** to continue. | *H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\1 - Inventory Management\9 - Inventory\Search Inventory2.png*  H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\1 - Inventory Management\9 - Inventory\Search Inventory3.png  H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\1 - Inventory Management\9 - Inventory\Search Inventory4.png  H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\1 - Inventory Management\9 - Inventory\Search Inventory5.png  H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\1 - Inventory Management\9 - Inventory\Search Inventory6.png |

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| **ADD INVENTORY** | | |
| **1** | Select **Inventory Management**, then **Inventory**, and then **Add Inventory Item.** | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\1 - Inventory Management\9 - Inventory\Inventory1.png |
| **2** | Complete the add inventory item fields.  \* Items are required | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\1 - Inventory Management\9 - Inventory\Add Inventory1.png |
| **3** | A drop down will appear when information is added into the **Product Name** field.  After entering the item additional options will appear.  Enter any applicable information.  \*Items are required.  Click **Add** when complete. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\1 - Inventory Management\9 - Inventory\Add Inventory2.png |
| **4** | A confirmation will appear when an item has been successfully added. | H:\Mary Sharp\IMATS\Manual & Pages\In Progress Manual\New Screen Shots 11-19-14\1 - Inventory Management\9 - Inventory\Add Inventory5.png |