1.05. Terms, definitions and conventions used in this user guide

If you aren't familiar with using a computer, you should read this chapter, and also work through the tutorial in section 3.

General terms

**Menus: **Choose // New item…// from the // Item// menu (sometime also written as // Choose// // Items > New item…// means… Click on the word // Item// in the menu bar, then choose // New item…// from the menu that drops down.

**Keyboard keys: **A handful of keys on the keyboard are used extensively and are indicated in *italics* font. The most common are: *Tab*, *Shift*, *Ctrl*, *Alt*, *Enter* and *Backspace*.

**Field: **An area where you can make an entry, either text or numbers - usually a white coloured box. In many places a user can hover over an input field for a description of what is required.

**Typed data: **Anything that must be typed into a field is shown in `monospace font`. For example: Type `100` and press *Enter*.

**Checkbox: **Is a box that changes from having an “X” in it to being blank each time you click in it. To “check” a check box means to click it so that an “X” appears (if there is not one already present). Check boxes have text beside them explaining what the box is for.

**Tab & Shift: **You can generally move the “focus” (the active area) from field to field in a window by using the *Tab* key. Holding down the *Shift* key while pressing the *Tab* key will move the focus from field to field in the reverse order to normal. Note that on Windows, some buttons are “tabable”- that is, pressing the *Tab* key moves the “focus” to a button. Pressing the *Return* or *Enter* key then activates that button.

**Highlight button: **Pressing the // Enter // key will operate the highlighted button in a window, which is usually the OK button.

**Double-click: **In lists (e.g. of Names or Items), double click the left mouse button on a line to edit or view more details.

**Insertion point: **Is the blinking line in a field that indicates which field is currently accepting typed input.

**OK button: **The OK button can be operated by pressing the *Enter* key.

**Cancel button: **The cancel button can be operated by holding down *Ctrl* key (*cmd* on Macs), and pressing the period key (full stop).

**Path to a file (or document): ** Is a way of describing where a document is stored on your hard disk. It is written as “hard disk:folder 1: folder 2:document”, which is the same as “C:\folder 1\folder 2\document”.

**Modifier keys: **Windows and Macs have different// // modifier keys. We've tried to list both in the manual, but sometimes one might slip through, so

- The Windows *Ctrl* key does the same as the *cmd* (command) key on Macs
- The Windows *Alt* key does the same as the *opt* (option) key on Macs.

**Column headings: **Column headings can be clicked to sort the list by that column.

Negative values: In general, there is no need to enter negative values in mSupply. Even when you are entering returned goods from customers, or returned goods to suppliers, you must enter positive values. mSupply automatically converts the invoice total to a negative amount when it is a credit to a supplier or from a customer.

mSupply terms

Basics

Items: Items are the products we manage in mSupply, including medicines, consumables, equipment, laboratory and radiology items or even larger assets such as vehicles and furniture. An item may or may not have stock lines at any given time. For example: In the example data file provided with mSupply, “Amoxycillin 250mg tab/cap” is an item. When you first start to use the example data file it has 2 stock lines. (You can view them under the “stock” tab of the // Item details // window (more on that later!).

Item Lines (or “Stock Lines”): Represent different batches of the same item.

Stock: Represents the physical stock (inventory) in your store.

Stores: Stores are facilities using mSupply (desktop or mobile). Some facilities can run multiple stores. For example, there may be a pharmacy in the emergency department that manages stock completely separately to the main pharmacy – this can be a separate store (if they are using mSupply).

Locations: Locations are places within stores where items are kept. Locations can only exist within a store. A large store like a central warehouse may have several thousand highly specific locations (e.g. A.02.04, B.01.03), while a small store may only have a few locations (e.g. Room 1, Room 2). Items may also be stored without assigning a location: this is common in very small facilities, where items are just stored alphabetically.

People

Suppliers: Suppliers are facilities that a store orders or receives stock from. Suppliers may be external (e.g. private drug companies or wholesalers) or internal (e.g. central medical store, provincial warehouses).

Donors: Donors are external entities who pay for donated stock (e.g. UNICEF, USAID). No donor is entered when the government or medical store is paying in a normal financial transaction. When the donor is recorded, you can track donated items through the supply chain and run donor transaction reports and stocktakes.

Customers: Customers are recipients of items, excluding patients (usually). This includes health centres, hospitals, wards, private clinics and pharmacies, touring medical teams, outreach services and any other entity that an mSupply store issues stock to.

Patients: Patients are individual people who receive items from a prescription. When a store uses mSupply in dispensary mode, patients receive unique ID numbers and we can track their prescription history, allergies, payment history, insurers and notes.

Prescribers: Prescribers are authorised medical professionals who provide prescriptions to patients, which we can dispense in mSupply. Prescribers may include doctors, nurses and other authorised individuals.

Users: Users are the people using mSupply (you!). Each user has their own password and set of permissions (which can vary from store to store). System logs track everything that users do in mSupply.

Transactions and Features

Builds: Builds are transactions that record the manufacturing of an item by turning raw materials into a finished product.

Stocktakes: Stocktakes are physical counts of the stock in your store including all item details, such as the item name, quantity, batch and expiry date.

Purchase Orders: Purchase Orders are used to order stock from an external supplier i.e. a supplier who does not use mSupply (e.g. private drug companies, wholesalers, private pharmacies).

Goods Receiving: Goods Receiving is used to receive stock from an external supplier who we previously ordered stock from via a purchase order. We can then create a Supplier Invoice directly from the goods receipt to add received stock to our inventory.

Supplier Invoices: Supplier Invoices are used to add received stock to our inventory. They are also known as “bills”.

Internal Orders: Internal Orders are used to order stock from an internal supplier i.e. a supplier who does use mSupply (e.g. central medical store, provincial warehouses).

Requisitions: Requisitions show internal orders placed to our store from customers using mSupply. Examples of customers using mSupply include provincial warehouses, public hospitals and health centres. We can create a Customer Invoice directly from the requisition to issue stock to a customer.

Customer Invoices: Customer Invoices are used to issue stock to a customer from our inventory.

Prescriptions: Prescriptions are instructions written by a prescriber authorising a patient to be provided a medicine or medical device. mSupply can record dispensed prescriptions and maintain patient dispensing histories.

Patient Credits: Patient Credits are used to return items from patients and record credits in their favour. mSupply tracks patient credits and applies them to outstanding prescription payments.

Payments: Payments are used to record payments made to suppliers. mSupply tracks outstanding payments from supplier invoices.

Cash Receipts: Cash Receipts are used to record payments received from customers for customer invoices. They can also be used to record patient payments for dispensed items. mSupply tracks outstanding payments owed by customers and patients.

Supplier Credits: Supplier Credits are used to return items to suppliers and record credits in your favour. mSupply tracks supplier credits and applies them to outstanding supplier payments.

Customer Credits: Customer Credits are used to return items from customers and record credits in their favour. mSupply tracks customer credits and applies them to outstanding customer payments.

Cash Register: The Cash Register records incoming and outgoing cash transactions and displays a current balance. mSupply tracks all cash movements and records them here.

Configuration

Visibility: Visibility allows us to control what stores, customers, suppliers and items a user can see when logged into a specific store.

Preferences: Preferences are system-wide settings that apply to all stores and users.

Store Preferences: Store Preferences are settings that apply to specific stores.

Permissions: Permissions are settings that apply to specific users as either individuals or groups.

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