4.11. Managing item access

Introduction

Item departments are a mechanism by which you can restrict item availability to certain customers only.

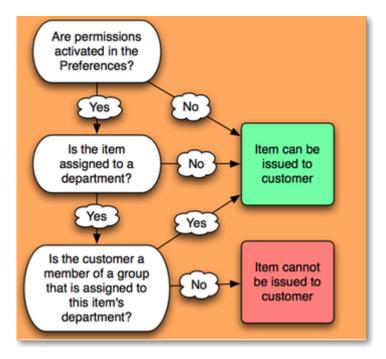
Item departments are a bit complicated. Here's what you need to remember:

- Each customer can be a member of only one group.
- Each item can be a 'direct' member of only one
- department. However, a department can be a member of another department, so an item can, in effect, be a member of more than one department
- Each group can have access to items from *multiple* departments.



The Activate restricted item access by customer group option must be turned on in **Preferences**>Invoices2 before this option to work.

• Here is a summary of how department groups affect whether or not an item can be issued.



• When you attempt to issue stock to a customer whose group does not have access to the

department of the item you are issuing, either a warning will be displayed or mSupply® will not allow you to issue the stock - depending on how your preferences are set.

- Items that are *not* in any department can be issued to *any* customer
- Items that *are* members of a department can *not* be issued to any Customers that are *not* members of a group.

Creating and editing item departments

Choose **Show departments** from the **Item** menu displays the **Edit departments...** window. This is where you are able to create and edit item departments. Once you have created departments the window might appear something like this, and you are now ready to assign items to a department:

	Department list	
+	8	
New	Re-order	
	Department	1
Other Med	cine	
AntiMalaria	l i i i i i i i i i i i i i i i i i i i	
Health Proc	fucts	
Anti-TB me	dicines	
Other med	icines	
NonHealth	Products	
Health_Pro	ducts	
STI		
MMT		
01		
ARV		
		_
Double-clic	k a department to edit details	
	ОК	

View item departments

Taking as an example the department **Anti anaemic tablets**, the items in the department are shown by clicking **Show item departments** on the **Item** menu, and then double clicking on the **Anti** anaemic tablets department:

🏚 Ec	dit item department	• ×
_	spartment 10 Tabs Anti-Anaemics neral Items	
	Items that are members of this departme	
	ltems	
	Ferrous Sulphate 200mg tab	
	Ferrous Sulphate+Folic acid 200mg+0.4mg tab	
	Folic acid 5mg tab	
		-
	< III	•
	Delete Cancel	ОК

 Each department can have any number and combination of items and departments in it.

Setting up access from customer groups to item departments

• From the **Item** menu, choose **Manage item access...**, and this window is displayed:

Item department		Customer groups		
Item department	*	Customer groups	*	-
00 Specialty	=			
01 Dangerous Drugs				Add a new relationship
02 Eye/Ear				relationship
03 Inhalations				
04 Recto-vaginal				*
05 Injections				Delete a
06 IV Fluids				relationship
07 Oral Mixt - Antiinfectives				
08 Oral Mixt - Other	Ŧ		-	
ink customer groups with item depa	utment			OK

- The left hand list shows the available departments
- The right hand list shows the customer groups that presently have access to the department which is highlighted on the left hand side.
- The example shown identifies the four customer groups which are linked to the Anti-anaemic item department:

Edit customers groups.	-			
Item department		Customer groups		
Item department	*	Customer groups	~	-
09 Tabs Analgesics		Rural clinic		
10 Tabs Anti-Anaemics		Urban clinic		Add a new relationship
11 Tabs Anti-asthmatics	E	MCH clinic		relationship
12 Tabs Anti-histamines		hospital >50 beds		
13 Tabs Anti-infectives				*
14 Tabs Cardiovascular				Delete a
15 Tabs Diabetic				relationship
16 Tabs Gastro				
17 Tabs Vits & Mins	Ŧ		Ŧ	
Link customer groups with item de	partments	5.		OK
				UK.
				4

- The icons on the right side allow you to add and/or remove groups that have access to the highlighted department.
- Clicking the Add a new relationship button shows a list of groups you can add:

-	Add new custome	X
	Add new customer	
	hospital >50 beds	
	hospital <50 beds	
	Urban clinic	
	Rural clinic	
	MCH clinic	
	Island health post	
		-
	Cancel	

• Double-click (or click and then click OK) to add a group to the current department. You will be given a warning if you try to add the same group twice.

Show groups

Customer groups can be used to group customers (or suppliers) together for reporting purposes, and also to set up an item restrictions scheme, allowing some items to be issued only to certain customers.

An explanation of how to set up a restriction scheme is in Managing Item access.

The groups window allows you to set up group names:

le Customer gr	oup		×
-	*		
New Group	Delete		
	Show groups		*
hospital >50 bed	5		
hospital <50 bed	s		
Urban clinic			
Rural clinic			
MCH clinic			
Island health pos	st		
4			Ŧ
4		,	
Double-click a g	group to edit de	tails	
		OK	

- Click the **New group** button to add a new group.
- Double-click an entry to edit its name:

Gr	dit group name oup name Rural clinic Names that are members of this group	×
	Namon Dispensary	*
	Aonnati Dispensary	
	Teraina Health Centre	
	Candon Health Centre	
	Orona Health Centre	
		-
	Cancel OK	5

- You can enter or edit the group name in the top field.
- The list displays all names which are members of this group.
- Click the **Delete** button to delete a group. You can only delete groups that have no names as members. You can remove group members from the **Groups** tab of the name viewing window (From the **Customer** menu, choose **Show Customers** and find the required customer in the usual way.)

Edit customer/supplie	r	
Banana Dispensary		
General Invoices Back	orders Quotes Notes Cont	acts Emails Group Purchase orders
Customer gr	none	
Item depa	tmen hospital >50 beds plied hospital <50 beds Urban clinic Rural clinic	d to this group.
	MCH clinic Island health post	

- The drop down list displays the group to which this customer belongs, and to remove the customer, make sure **none** is selected from the drop down list; to assign the customer to a different group, highlight the new group in the drop down list.
- Click **OK** to leave the window.

Departments

Overview: A manufacturer might create departments for raw materials, packing materials, and quality control reagents. A drug store or hospital might create departments according to dose form or according to pharmacological classification, etc.

From the **Item** menu, choose **Show departments** ...; you are shown a list of departments:

ew New	S Re-order	
	Department	
NTP_lab		
Other Medi		
AntiMalaria		
Health Prod		
Anti-TB me		
Other medi	cines	
NonHealth_	Products	
Health_Proc	lucts	
STI		
MMT		
01		
ARV		
Double-clic	k a department to edit details	

By default the list displays in alphabetic order; clicking on **Departments** toggles between alphabetic order and reverse alphabetic order; you may also drag and drop individual departments to any position in the list to suit your own requirements, and on clicking OK you will be asked whether or not you wish to save the list in the order you have specified.

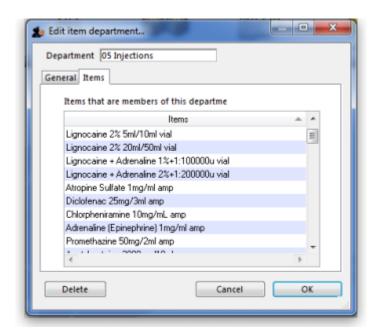
To add a new department, click the **New dept** button.

To edit a department, double-click the department you want to edit. You are shown a window allowing you to edit the department name:

🔹 Edit item department – 🗆 🗙
Department narcotics
General Items
Allow issuing items to customers in non-member groups?
Delete Cancel OK

The radio buttons allow you to choose what will happen when you attempt to issue an item to a customer who is not a member of a linked group. Either the user can be warned or the issue can be disallowed. This only applies if you have **Activate restricted item access by customer group** turned on in the Preferences - otherwise you can ignore this setting.

The **Items** tab displays a list of items that are members of the group you are viewing:



To delete a department

Double-click it to display the entry window, then click the **Delete** button. Note that you can not delete a department that has item members. You will be warned if you try to do this. To delete a department with Items, click the items tab and note the items that are members, then edit those items (using the **Items > Show items ...** menu command) and set their departments to either none or a different department. You will then be able to delete the department.

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