# 4.03. Item categories

Item categories are a great way of grouping your items. This enables you, for example, to report on specific groups of products by filtering by item category. This can be extremely helpful.

mSupply provides 4 different categories (called category 1, category 2, category 3 and VEN) for you to use. Category 2 and 3 are normal categories but 1 is a bit special - it's hierarchical and has 3 levels (level 1, 2 and 3. Level 1 is the top level, level 3 is the bottom). VEN refers to the WHO categories of Vital, Essential and Nonessential.

Be careful not to get mixed up between the levels of category 1 (1, 2, and 3) and the different categories (1, 2, 3 and VEN) themselves here!

# **Category 1 categories**

Selecting **Show Item Categories** from the **Item** menu opens the window appearing below, showing all the category 1 categories in their 3 levels by default (Note that the 3 "None" categories are default categories and cannot be renamed or removed):

Add Add child Delete	
<ul> <li>None         <ul> <li>None</li> <li>None</li> </ul> </li> <li>Anaesthetics         <ul> <li>1.1 Anaesthetics, general</li> <li>1.2 Anaesthetics, local</li> <li>1.3 Anaesthetics, Pre-operative medicatic</li> <li>2. Analgesics, Antipyretics, NSAIDs, Gout</li> <li>2.1 Analgesics, etc., NSAIDs &amp; non-opioi</li> <li>2.2 Analgesics, etc., Opioids</li> <li>2.3 Analgesics, etc., drugs for Gout</li> <li>3. Antiallergics, drugs for anaphylaxis</li> <li>4. Antidotes                 <ul> <li>4.1 Antidotes, non specific</li> <li>5. Anticonvulsants, antiepileptics</li> <li>6. Antiinfectives, anthelmintics                     <ul> <li>6.1.3 Antischistosomals and antitrema</li> <li>6.2.3 Antileprosy medicines</li> <li>6.3 Antiinfectives, antibacterials</li> <li>6.3.1 Beta Lactam medicines</li> <li>5.3 Other antibacterials</li> <li>6.3.1 Other antibacterials</li> <li>1.1 Antibacterials</li> <li>1.2 Antibacterials</li> <li>1.3 Other antibacterials</li> </ul> </li> </ul> </li> </ul></li></ul>	Items assigned to selected category

In the screenshot you can see that "6.Antiinfectives" is a top level (level 1) category 3 category. It has 3 level 2 child categories: "6.1 Antiinfectives, anthelmintics", "6.2 Antiinfectives, antiamoebic/antigiardics" and "6.3 Antiinfectives, antibacterials". And level 2 category "6.2 Antiinfectives, antiamoebic/antigiardics" has a single level 3 category "Antileprosy medicines".

Clicking on any of the categories will show you which items are assigned to that category in the panel on the right hand side of the screenshot.

#### Adding category 1 categories

To add a category at level 1, 2 or 3, click on another category at the same level you want the new one to be, click on the *Add* button (or the *Add child* button if you want the new category to be a child of the category you selected) shown in the screenshot and the new level will appear at the bottom of the categories pane called "Click to edit" and already selected. Click on it once and type the category's name. When you're done click outside the category and that's it!

#### Editing category 1 categories

Renaming a category is simple. Click once on the category you want to rename to select it then click on it again to edit the name: the category will become a text box and you can type the new name. When you've finished editing the name, simply click outside the textbox (but inside the category pane) and the new name will be saved.

Changing the parent of a category is almost as simple. You simply click on the category once to select it then click on it again, drag it onto its new parent (or a sibling of the new parent) and let go of the mouse button. Two things to note here:

- You can only move a category to a position at the same level. If it's a level 3 category then you can only drop it onto a level 2 category or another level 3 category. If you drag a level 3 category onto a level 1 category nothing will happen. For example: in the screenshot you could drag category "6.1 Antiinfectives, anthelmintics" onto category "1. Anaesthetics" or onto category "4.2 Antidotes, specific" and it would move (to become a child of category "1. Anaesthetics" or "4. Antidotes"). But if you dragged it onto category "6.2.3 Antileprosy medicines" it would not move (this is a level 3 category, 1 level below "6.1 Antiinfectives, anthelmintics" so the move is not allowed).
- If you move a category which has any child categories, all the child categories will be moved too. For example: in the screenshot you could drag category "6.1 Antiinfectives, anthelmintics" onto category "4.2 Antidotes, specific" and it would move to become a child of category "4. Antidotes". It's child ("6.1.3 Antischistosomals...") would remain its child and become a grandchild of "4.2 Antidotes, specific".

#### **Deleting category 1 categories**

This is the simplest of all. Select the category you want to delete by clicking on it and then click on the *Delete* button. After confirming you want to delete the category it will be deleted. mSupply will not allow you to delete categories that have items assigned to them - it will warn you that you have to remove the items from the category first. See the Assigning items to categories section below for details on how to do this.

## **Category 2 and 3 categories**

Category 2 and 3 categories are simpler - they are not hierarchical. To view the category 2 or 3 item categories select **Show Item Categories** from the **Item** menu and change the *Show* drop down list at the top of the window to "Category 2" or "Category 3" and the window will change to look like the screenshot below:

Show item ca	tegories
Show: Category 2	\$
New Save sort order	
here Categories	Contractor
Item Categories	Sort order
Another example cat2 category	1
Example cat. 2	2
	Cranel OK
	Cancel

The window shows a list of the existing categories of this type.

**Save sort order button:** The sort order of the categories is the order they will appear in the list when you are assigning items to the categories (see the Assigning items to categories section below) or when you're selecting them in a filter e.g. for a report. You can drag the categories up and down the list to give them the order you want them to appear in. When you are happy with the order, click on the **Save sort order** button and the order will be saved.

**New button:** Clicking on this will take you to the edit category window shown below:

0 0	Edit item category
Item category Ar	other example cat2 category
ems that are memb	pers of this category :
	Items
	OK & Next Cancel OK
Delete	

Simply type the name of the category shown in the *Item category* textbox and click on the *OK* button to create the new category

If you double click on a category in the list you will also be taken to the edit category window where you can edit the category's name, see which items have been assigned to the category, delete the category (click on the *Delete* button).

#### **VEN categories**

mSupply allows you to categorise items according to the World Health Organisation categories of:

**Vital** - medicines are potentially lifesaving, have significant withdrawal side effects (making regular supply mandatory), or are crucial to providing basic health services.

**Essential** - medicines are effective against less severe but nevertheless significant forms of illness but are not absolutely vital to providing basic health care.

**Necessary** - this group of drugs is used for minor, or self- limiting illnesses, and those which have a comparatively high cost for additional therapeutic value. It includes drugs which are prescribed but which provide useful alternative therapy.

	Die Item name	AZITHROMYCIN TABLETS 500MG		Store: National Medical S
ers le aterials e Orders	Item code     General     Units     Department     Category     Category 2     Category 3	L475 EACH   FO ORDER ONLY  Antibacterials None  None	Pricing Default sell price of prefer Price editable v Full description	efault margin 0 rred packsize 0.0000 when issuing 0
puons ing ing	Interaction group Item flag Catalogue code Allow Convert p Shelf location Bulk shelf location Preferred pack size Volume per pack Restricted to	None  2010_SOA  Hold: do not issue Issue in builds only pack to one conversion pack to 1 when receiving  None  Outer pack None  Outer pack vol  Weight per 0 m3 None	VEN Category Not assigned Vital Essential Necessary size 0 ume 0 m3 pack 1 kg	Stock category Normal stock Critical stock On essential drug list Custom fields GL DESC DRUGS-INFECT FORMULARY SPECIALITY TBA 0.00 BRAND NAMES MAN ITEM Ignore Customer

You can use these categories to make purchasing decisions using reports such as the Suggest Order Quantities report.

## Assigning items to categories

Once you have set up the categories, all items can be assigned to their appropriate category. This is performed on the *Item details* window under the *General* tab (get here from File > Show items, click on the *Find* button and double click on the item you want to add to a category):

eneral	Dexamethasone 4mg tab		Store: General *
isc sage ock edger uotes ackorders otes econcile ill of materials urchase Orders	General  General  General  General  Department category None  Category 2 None  Category 3 None  Category 4 None	Pricing Default sell price of prefer Price editable v Full description	fault margin 0 red packsize 0.00 when issuing
raer options ispensing eporting 29 ST tores	Interaction group None  Item flag Catalogue code D Hold: do not issue Issue in builds only Allow pack to one conversion  Convert pack to 1 when receiving	VEN Category Not assigned Vital Essential Non-essential	Stock category Normal stock Critical stock On essential drug list 🗹 Custom fields user_field_1
Si Bi	Shelf locations Shelf location None Outer pack Bulk shelf location None Outer pack vo Preferred pack size 100 Weight per Volume per pack 0 m3 Restricted to None	k size 0 olume 0 m3 pack 0 kg	user_field_2 3 user_field_3 user_field_5 0.00 user_field_6 0 user_field_4 user_field_7 1
Delete			

To assign the item to a category 2 or category 3 category, select the correct category from the *Category2* or *Category 3* drop down lists.

To assign the item to a category 1 category click on the magnifying glass next to the *Category* box. The following window will open:

eral c ge	-			
ge	Item name	penicillin VK (Phenoxymethyl) 25	50mg tab	Store: General O
8 ·	ltem code	pen250t	Pricing	
k	General		Default sell price of preferre	ault margin 0 of packsize 0.0000
tes	Department	ea 0	Price editable wi	hen issuing
oncile	Category		Full description	
f materials hase Orders	Category 2	None C		
r options ensing	Interaction group	None		
registration	Item flag		VEN Category	Stock category Normal stock
isitions	Catalogue code p     Hold: do not issue     Issue in builds only     Allow pack to one conversion     Convert pack to 1 when receiving	Vital Essential Necessary	Critical stock	
15			Custom fields	
			user_field_1	
	Shelf locations			user_held_2_06.2.1
	Shelf location N	ione Outer pack	k size 0	user_field_3
	Bulk shelf location N	one Outer pack vo	olume 0 m3	user_field_5 0.00
	Preferred pack size	100 Weight per	pack 0 kg	user_held_6_0
	Volume per pack	0 m3		user_field_4
	Restricted to :	None		user_held_7
Delete			OK & Previous	OK & Next Cancel OK

You can assign an item to a category 1, 2 and 3 category at the same time.

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