

## 4.05. Programs

There are a number of ways of modelling programs in mSupply:

- completely separate sets of virtual stores for each program (see section [22.08. Virtual stores](#))
- tag stock with different program labels in the same store (see section [7.06. Custom stock fields](#))
- use the donor field as the program label (see section [7.07. Managing donors](#))
- and probably a few more ways you can think of!

You can also manage requisitions by program. This involves using some special settings for master lists. In this method, a program is an extension to a [master list](#). A program includes a standard list of items as well as:

- **Order Types:** defined categories setting the maximum number of orders and quantity of stock to be ordered per period.
- **Period Schedules:** defined time intervals when orders can be placed; [schedules and periods](#) must be set up before creating programs.
- **Regimen Data:** a defined list of additional information that may need to be provided by a customer when making a program requisition.

Examples of items commonly managed by programs include malaria, HIV and tuberculosis medicines and medical supplies.

### 4.05.01. Creating a program

A program is defined by additional settings made to a master list:

1. Navigate to the **Item** tab and click the **Master List** icon:



2. Double-click on a master list to open it (or [create a new master list](#)):



3. The Master list details window opens. Click on the **Program Settings** tab:



**Add item master list**

Description: Test master list  
Created date: 17/10/2024  
Note:  
Created by: mSupply Support  
Discount %: 0  
 Automatically add new items to this master list  
 This master list is a patient list  
 Is default price list

Items | In use by | Tags | Program Settings

This master list is a program  HIV program  Immunisation program  
eLMS integration code: [ ]

Program tags  
Tag: [ ]  
Period schedule: [ ]  
Order types

Name	Type	Max. orders per period	Max MOS	Max. lines	Threshold MOS	Emergency

Regimen data

Code	Name	Type	Default

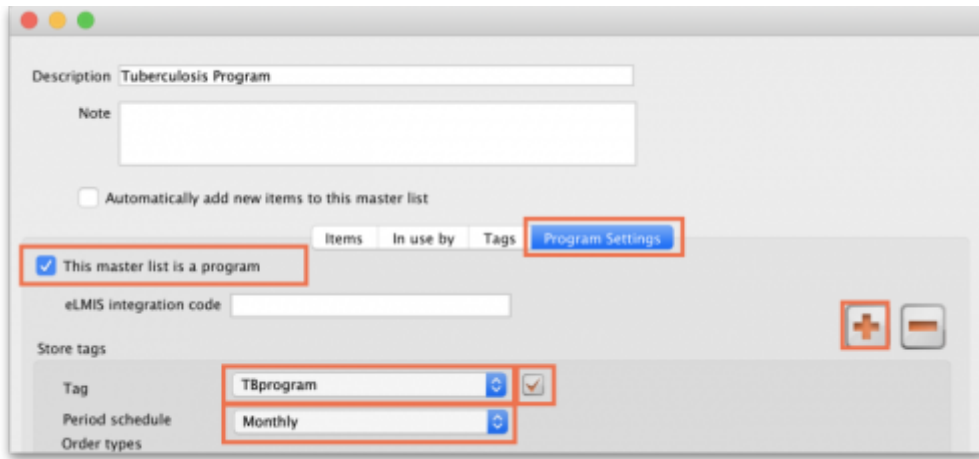
OK & Previous OK & Next Cancel OK

5. Tick the **This master list is a program** checkbox to enable the program based features for this master list. Create a *Store tag* for the program by clicking on the button just above the *Store tag* section. The **Tag** field will be automatically populated with a new tag. Edit this new tag name and click on the button. The field then becomes a drop down list which will contain any existing name tags (and the tick button becomes a modify button . If you click it you will be able to edit the tag name you just entered). and you can select one of those. When you click on the **OK** button any new tags you have created will be saved and will appear in the name tags list (see the [5.05. Name tags](#) page for details). Note, you can edit the tags entered here **until** you close this window. After that, you cannot edit existing ones, you can only delete them and add new ones.

Any customers or stores that have a name tag matching the tag you set here will be able to use this program; those that don't have this tag assigned will not be able to use this program.

6. Name the store tag and click the tick icon.

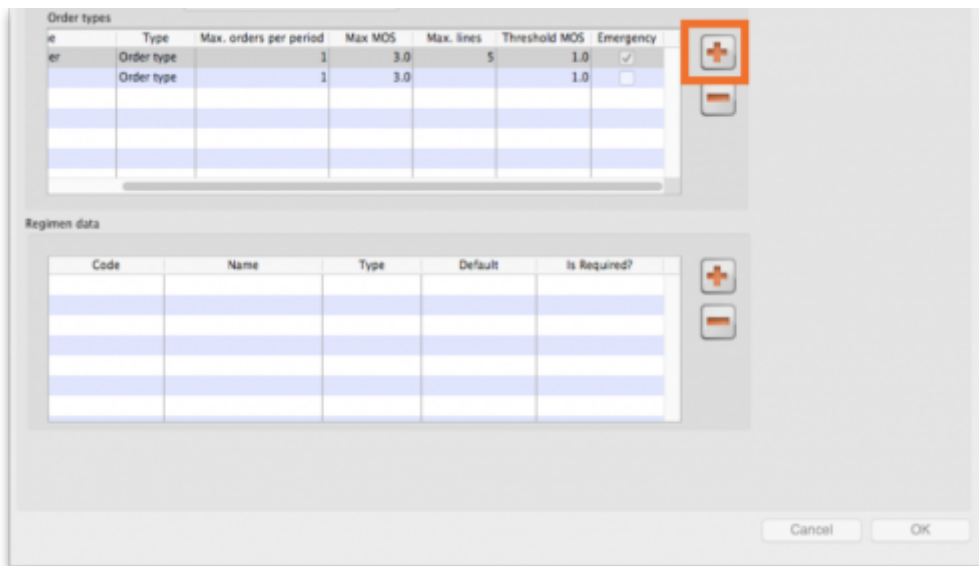
7. Select the **Period Schedule** from the dropdown list (you must have set the periods up first):



8. For each period schedule, one or more **Order Types** can be created - these set the parameters for program requisitions. Add order types by clicking the plus icon.

9. Give each order type a unique name and set its parameters:

- **Emergency:** check this box if the order type is for emergencies.
- **Max orders per period:** maximum number of orders that can be placed in a given period.
- **Max MOS:** maximum number of months' stock to be kept for each item. Used in the calculation of the suggested amount to order.
- **Threshold MOS:** items with a number of months' stock less than this value will appear in the order by default.
- **Max lines:** maximum number of items allowed to be ordered for an emergency order (default = 5); an alert will appear if the user tries to exceed the maximum number of items allowed.



### 4.05.02. Adding indicators to a program

Indicators are used for reporting on the performance of programs (drug regimens). Each indicator value provides data on a metric for a particular store and regimen over a given period. Indicator values are recorded while creating a program requisition.

Indicators allow an organisation to analyse regimen performance and determine what further data should be collected, stored and processed.

To add indicators to a program:

- Open the program via the **Master List** (Click on the **Master list** icon on the *Item* tab of the Navigator).
- Click on the **Program Settings** tab.
- In the **Regimen Data** table add fields for the data that should be provided to the supplier with each program requisition e.g. the number of patients treated.
- Check the **HIV program** checkbox if you want a fixed set of HIV-related indicators to be entered for this program.
- If the customer **must** provide this information for supply to occur, tick the **Is required?** box to make this a mandatory requirement.

The screenshot shows the 'Add item master list' form. At the top, it has a title bar 'Add item master list'. Below the title bar, there are input fields for 'Description' (containing 'Test master list') and 'Note'. To the right, it shows 'Created date: 17/10/2024' and 'Created by: mSupply Support'. Below these are a 'Discount %' field (set to 0) and three checkboxes: 'Automatically add new items to this master list', 'This master list is a patient list', and 'Is default price list'. A tabbed interface is visible with 'Program Settings' selected. Under 'Program Settings', there are checkboxes for 'This master list is a program' (checked), 'HIV program', and 'Immunisation program'. Below that is an 'eLMS integration code' field. The 'Program tags' section includes a 'Tag' dropdown, a 'Period schedule' dropdown, and an 'Order types' table. The 'Order types' table has columns: Name, Type, Max. orders per period, Max MOS, Max. lines, Threshold MOS, and Emergency. Below the 'Order types' table is the 'Regimen data' table with columns: Code, Name, Type, and Default. At the bottom of the form are buttons: 'OK & Previous', 'OK & Next', 'Cancel', and 'OK'.

### 4.05.03 Connecting a program to a store

To allow a store to place program requisitions:

1. Navigate to the **Special** tab and click on the **Stores** icon:

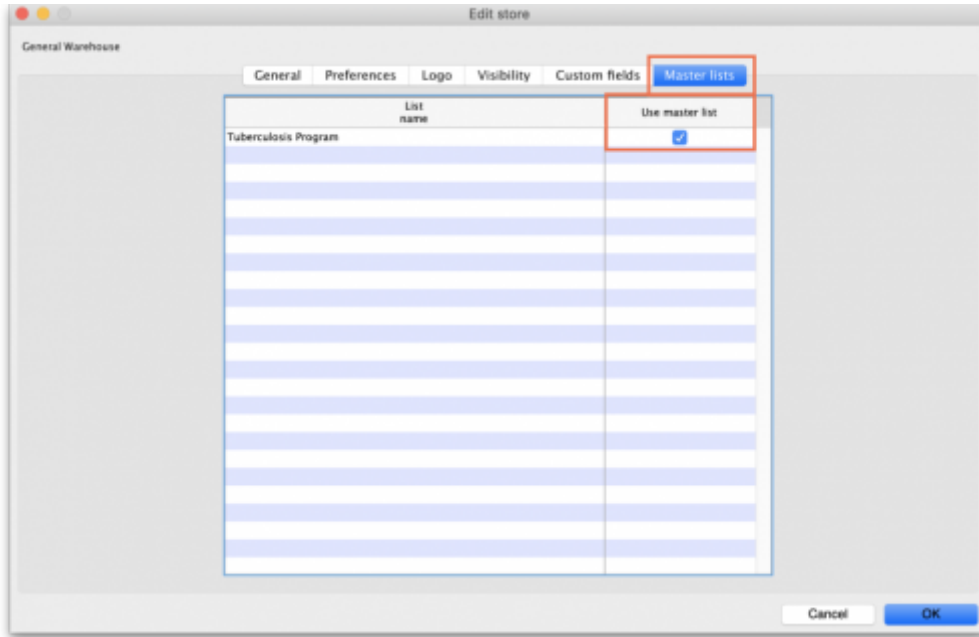


2. Double click on the store.

3. In the **Tags** field, type in the Store Tag you set for the program above then press *Tab*.



4. Click on the **Master Lists** tab, check the **Use master list** box next to the program master list to be used:

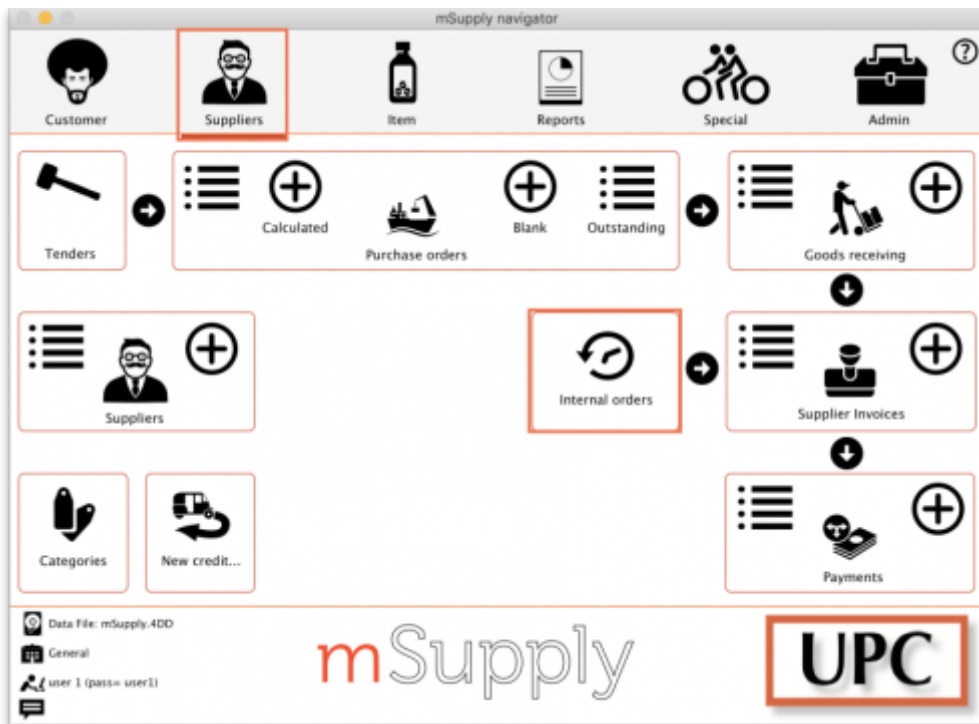


5. All done - the store is now connected to the program you have created so click on the **OK** button to save all the settings.

#### 4.05.04. Creating a program requisition

Once a store has been connected to a program, it can then place program requisitions:

1. In the customer store, navigate to the **Suppliers** tab and click on the **Internal Orders** icon:



2. Click **New Internal Order**. When a store uses programs, they will have the option to create a **Program** order or **General** (regular) order:

The screenshot shows a window titled "New internal order". It has two main sections: "Order type" and "Order details". In the "Order type" section, there are two radio buttons: "Program" (which is selected and highlighted with a red box) and "General". In the "Order details" section, there are several fields: "Program" (dropdown menu showing "Tuberculosis Program"), "Requisition type" (dropdown menu showing "Normal order"), "Supplier" (text input field with the placeholder "First, enter a supplying store name"), and "Period" (dropdown menu showing "January 2020"). Below these are "Start date" (1/1/20) and "End date" (31/1/20). At the bottom of the window are "Cancel" and "OK" buttons, with the "OK" button highlighted by a red box.

Check the **Program** button to create a program requisition.

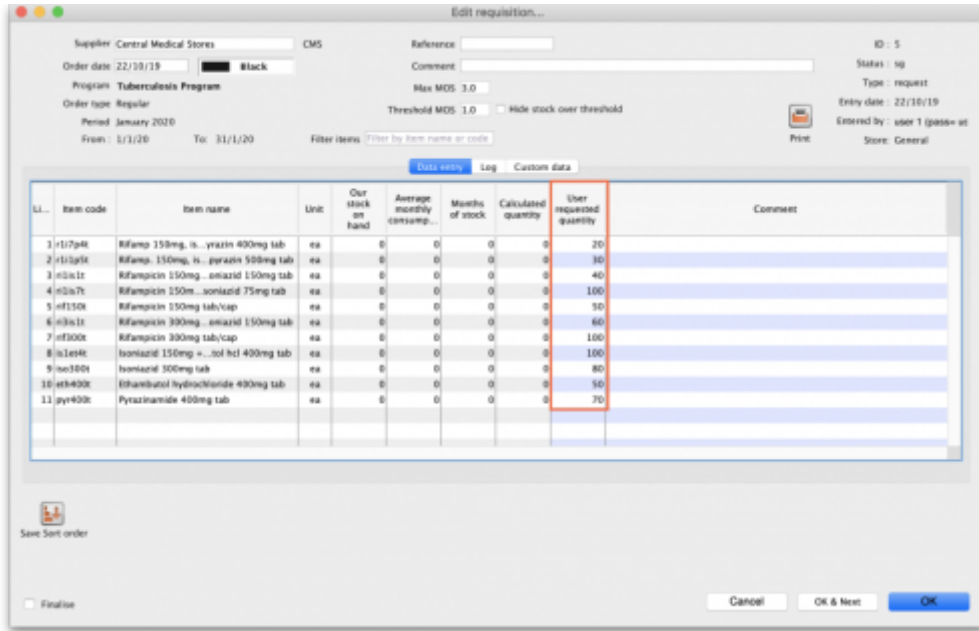
3. In the **Order Details** section, select the **Program**, **Requisition Type** and **Period** from the dropdown lists. Enter the **Supplier** by typing the first few letters, pressing *Tab* and selecting the supplier from the list of those starting with what you typed. These details need to be entered sequentially as the program uses them to determine the requisition type, which in turn determines the period.



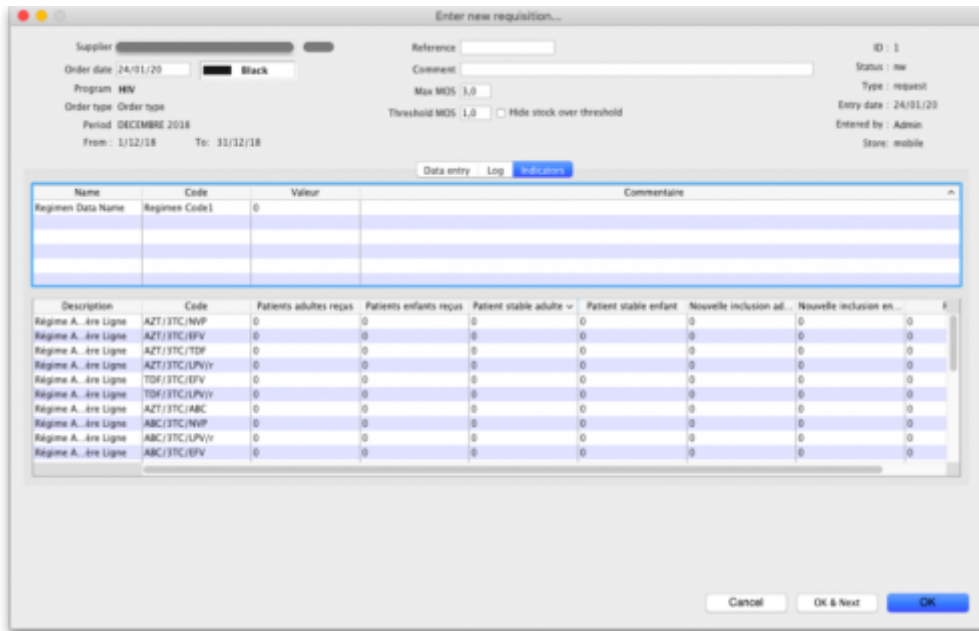
The **maximum number of program orders** that can be requested within a given period is set when the program is created (*Max. orders per period*).

If you try to create another order for the same period which **exceeds the maximum number**, an error message will appear and you will not be able to proceed.

4. Click **OK** to generate an internal order with all the items listed in the program master list. The details relating to the program order are in the top left. Review the data in the table, then enter the quantity of stock to be ordered in the **User requested quantity** column:

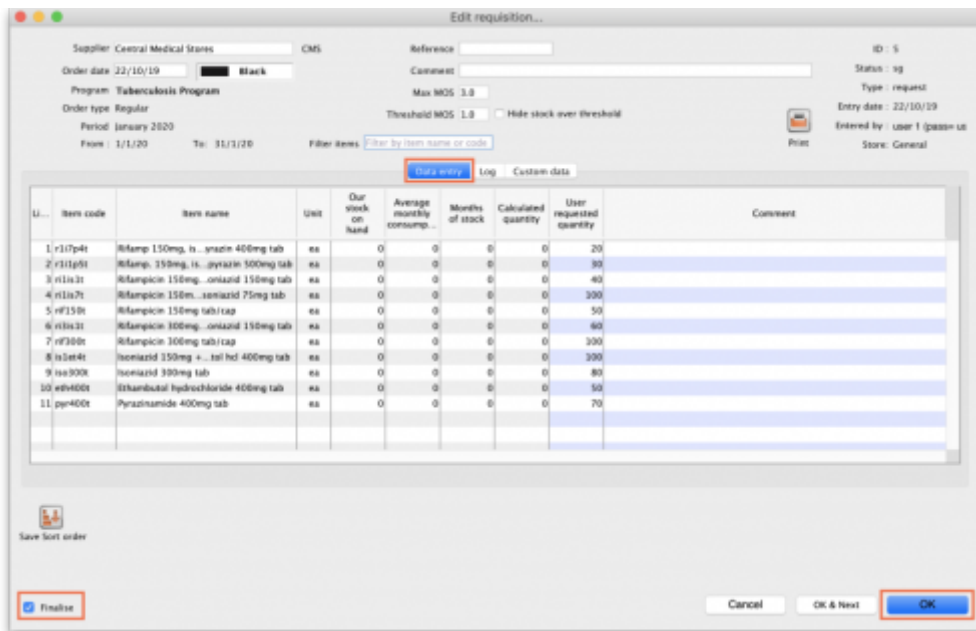


5. Click the **Indicators** tab to enter the additional data defined for the program:



This data will be sent to the supplier with the requisition when the requisition is finalised.

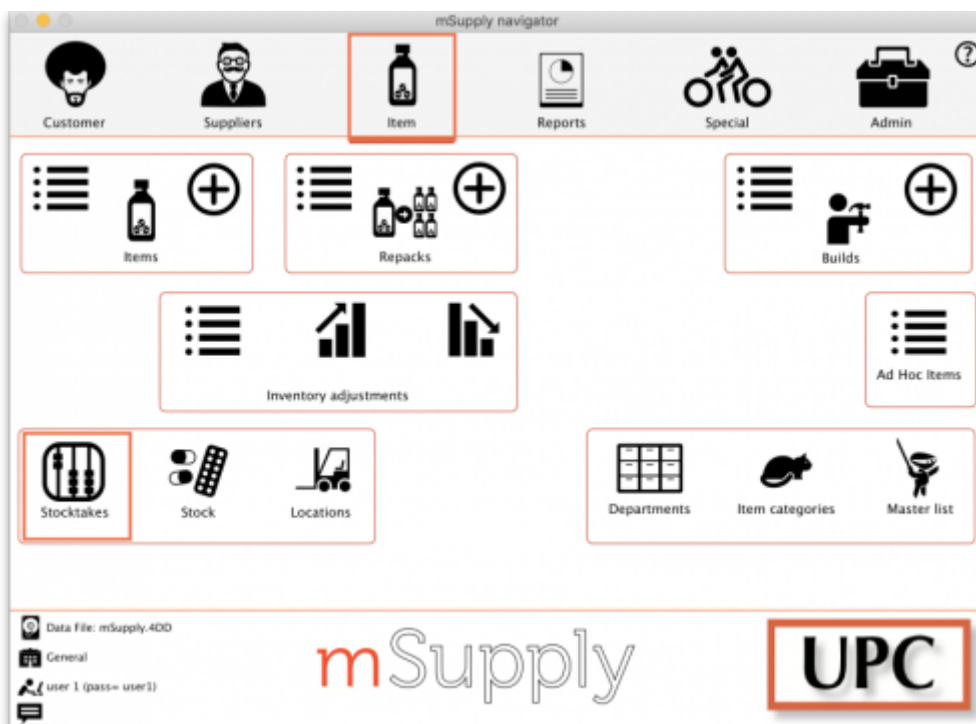
6. To send the program requisition to the supplier, return to the **Data Entry** tab, check the **Finalise** box and click **OK**.



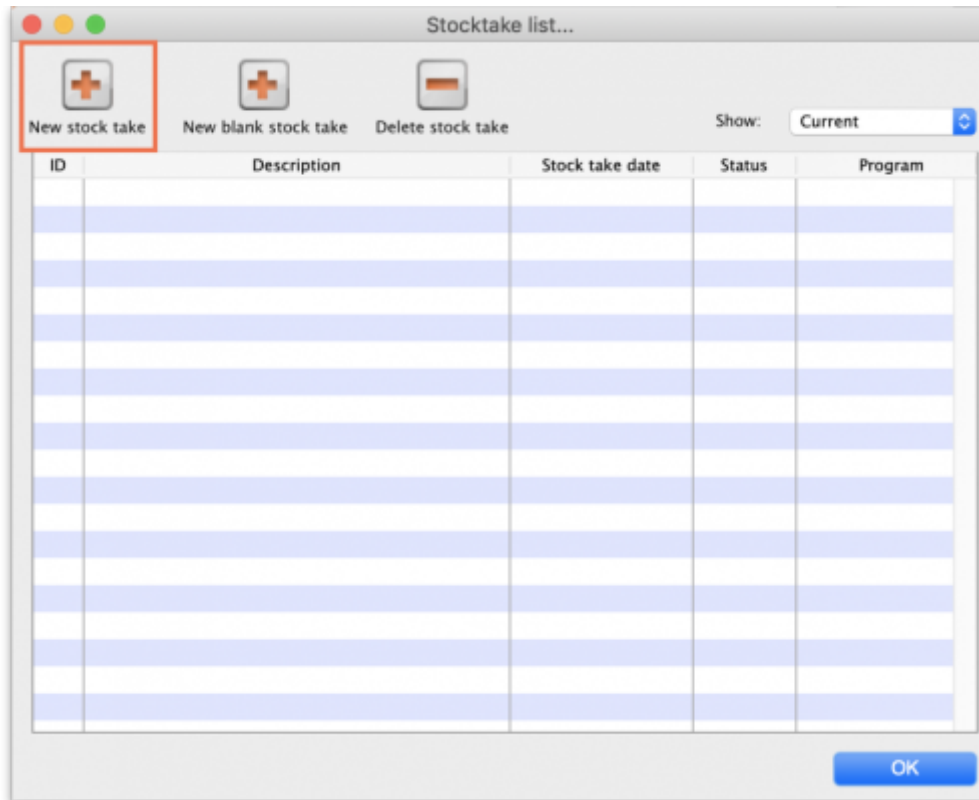
### 4.05.05. Creating a program stocktake

Creating a stocktake with items from a particular program is just the same as creating a normal stocktake. The only difference is that you select the program in the **Master list** (or **Program**) filter:

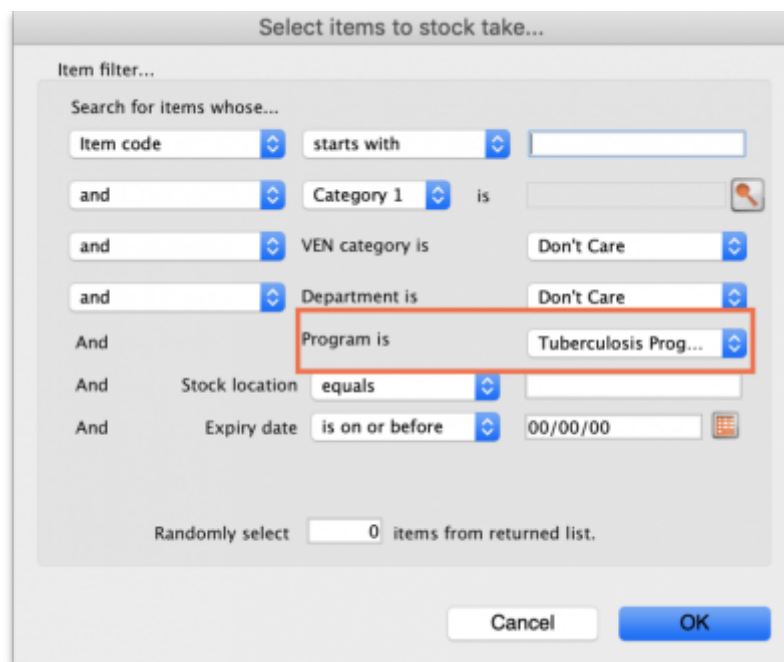
1. Navigate to the **Item** tab and click the **Stocktakes** icon:



2. The list of stocktakes window opens. Click the **New Stocktake** icon:



3. Select the program from the **Program is** (or **Master list is**) dropdown menu and click the **OK** button to pre-populate your stocktake with items from the program:



Note: To further refine the selection of stock appearing in the stocktake you can also select other filter items at the same time.

**For detailed information on how to complete the stocktake, refer to the [4.17. Stocktakes section](#).**

Tip: In your stocktakes list, you can easily identify program stocktakes by referring to the **Program** column:

