# Managing item access

### Introduction

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

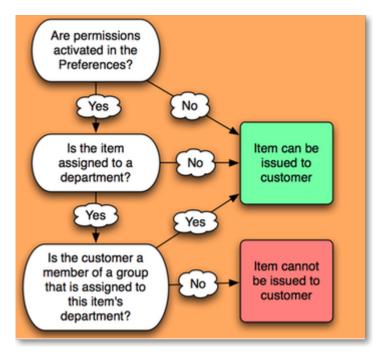
Item departments are a bit complicated. Here's what you need to remember:

- 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:

🔹 Edit item department					
_	spartment 10 Tabs Anti-Anaemics neral Items				
	Items that are members of this departme				
	ltems				
	Ferrous Sulphate 200mg tab				
	Fenous Sulphate+Folic acid 200mg+0.4mg tab				
	Folic acid 5mg tab				
		<b>T</b>			
	< 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	-		-	
ink customer groups with item deps	utments			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:

1 Add new custome	23
Add new customer	*
hospital >50 beds	
hospital <50 beds	
Urban clinic	
Rural clinic	
MCH clinic	
Island health post	
	-
Cancel OK	

• 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.

See the explanation of how to set up a restriction scheme by clicking here.

The groups window allows you to set up group names:

🖢 Customer gro	up		×
-	*		
New Group	Delete		
	Show groups		*
hospital >50 beds	2		
hospital <50 beds	2		
Urban clinic			
Rural clinic			
MCH clinic			
Island health pos	t		
			*
4		,	_
Double-click a g	roup to edit det	ails	
		OK	

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

se edit group name Group name Rural clinic Names that are members of this grou	ip	
Namon Dispensary		
Aonnati Dispensary		
Teraina Health Centre		
Candon Health Centre		
Orona Health Centre		
	-	
Cancel	ОК	

- 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/supplier		
Banana Dispensary		
General Invoices Backor	ders Quotes Notes Con	tacts Emails Group Purchase order
	n hone	
Customer grou	p none •	
Item departm	en hospital > 50 beds plie	d to this group.
	hospital <50 beds	*
	Urban clinic Rural clinic	
	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:

	Department list
+	2
New	Re-order
	Department
NTP_lab	Department
Other Media	cine
AntiMalaria	
Health Prod	lucts
Anti-TB me	dicines
Other medi	cines
NonHealth_	Products
Health_Proc	lucts
STI	
MMT	
01	
ARV	
Double-clic	k a department to edit details
	ОК

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.

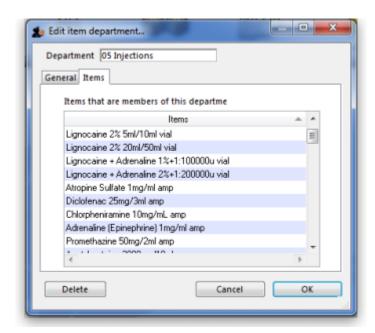
To add a new department, click the **New dept** button.

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.

Previous: Managing drug interaction groups Next: Prices in mSupply

