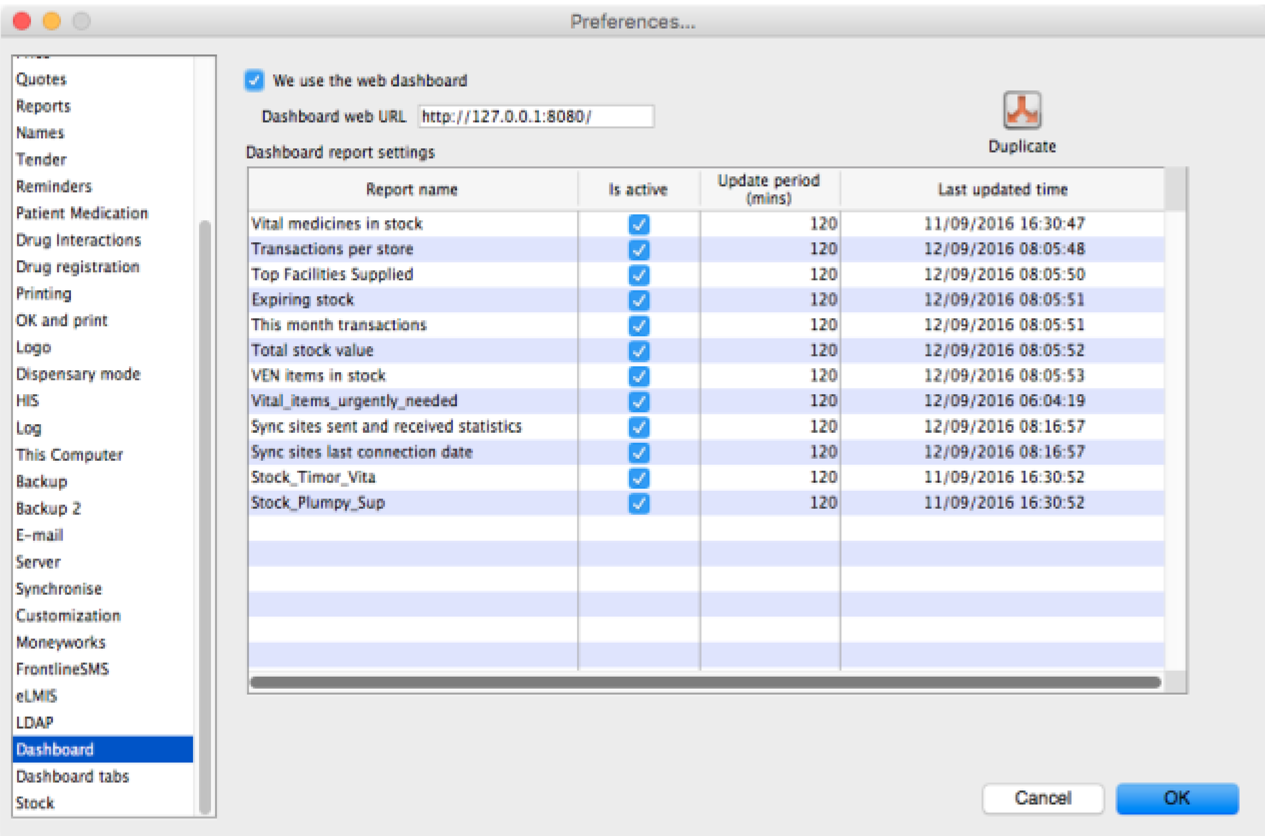
14.05. Dashboard set up (prior to mSupply v4.0)

The following instructions are for setting up dashboards for mSupply versions prior to v4.0.
For mSupply v4.0 and later please refer to the Remote User Web Interface chapter of this user guide.

Before the settings in this section will work you must make sure your webserver is currently running.
If a webserver is not yet set up for your organisation a request can be put through to mSupply Support.

Before you set the dashboard up you must:

- know what ports are already in use on the server
- have an appropriate SSL Certificate set up (Sustainable Solutions can help with this if needed)

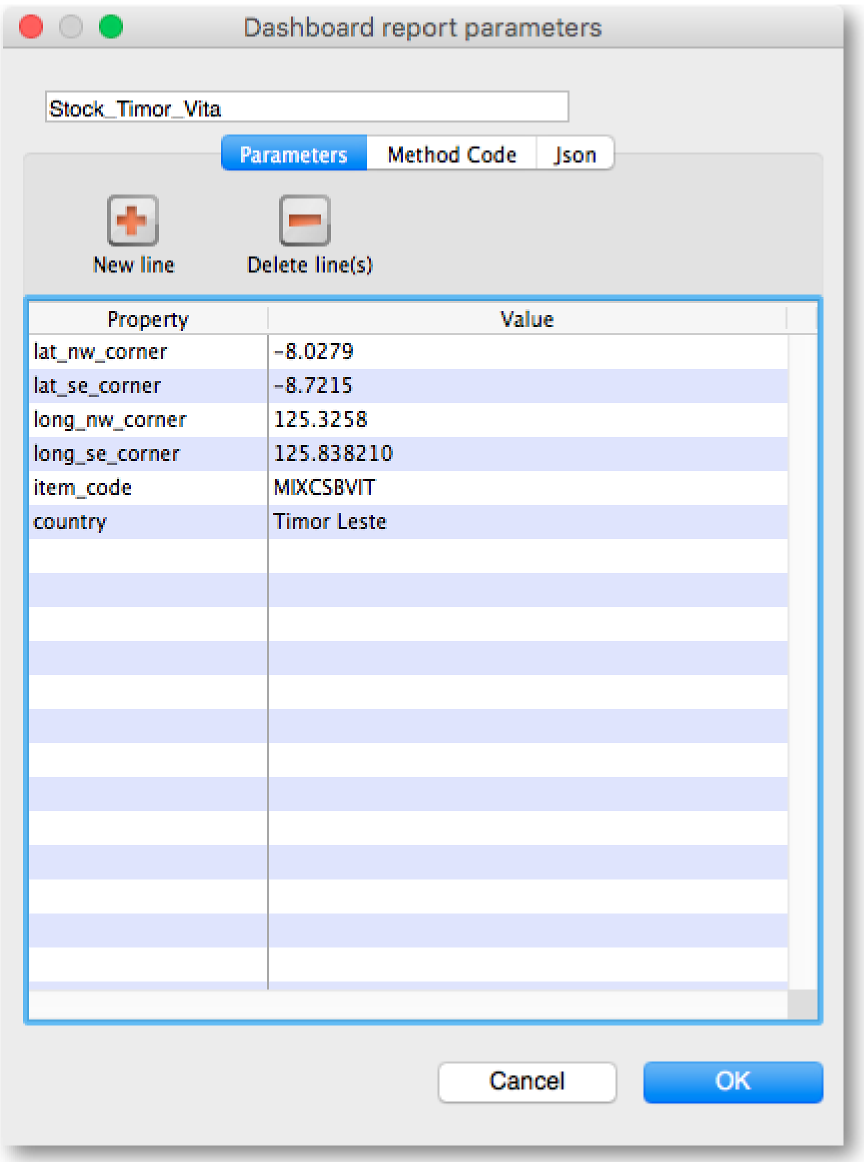


To setup the dashboard:

1. Check the “We use the web dashboard” checkbox.
2. In the **Dashboard web URL** field enter the base URL to reach the dashboard on e.g. `http://dashboard.msupply.org:2048/` (i.e. everything up to 'dashboard' in the URL you browse to - don't forget the trailing slash (/) otherwise it won't work!)
   1. if you are running from localhost, use your IP rather than `http://localhost` both here and in the browser
   2. the URL users type in to the address bar of their browser to access the dashboard will be this URL with `Dashboard` on the end
3. Tick the reports in the **Is active** column to select them for display on your dashboard.
4. You can choose how often these reports are updated by clicking in the **Update Period (mins)** column and entering a number of minutes.
5. Setup which reports appear on which tabs - refer Dashboard tabs.
6. Setup which dashboard reports each user can access - refer The dashboard.

Editing dashboard reports

Double-click a report in the list shown above and the following window will open:



If there are any properties shown in the list, these can be edited to change what is displayed.

To edit a property or value, click once to select the row, and then click again in the appropriate cell to edit it.

To add or delete a row use the **New line** and **Delete line(s)** buttons at the top of the window.

In the example shown in the screenshot above (a map report), the coordinates of two of the map corners and the item code of the item whose stocks will be shown on the map have been entered. Note that if you add extra properties to the default reports they'll be ignored.

See the section below for details of the various dashboard reports available and the settings that can be edited.

What the dashboards show and what can be edited

There are several built-in dashboard reports that everyone can use. Here's what they show and what properties can be edited to change what they show:

Report name	Property	Value
VEN items in stock: Shows stock on hand of each items that belongs to the VEN (Vital, Essential, Necessary) category.(*Method: dashboard_rep_item_ven*) Report format : Table		
	store_code	store code if empty then default store is chosen
	ven_category	V,E,N or E,N or V ..etc will filter the VEN items. If blank all visible items for the store are chosen
Total stock value: A single figure in your default currency, showing the total value of the stock you have in the store you are viewing the dashboard for. (*Method: dashboard_rep_total_stock_value*)		
	None	None
This month's transactions: Shows a bar chart of the number of purchase orders, goods receipts, supplier and customer invoices created this month. (*Method: dashboard_rep_month_transacs*)		
	None	None
Expiring stock: Shows the cumulative and monthly number of all items expiring within the year, split into columns by month of expiry. (*Method: dashboard_rep_expiring_stock*)		
	None	None
Top facilities supplied: The 10 customers in your store to which you have sent the greatest value of stock in the past 90 days. Shows the value of stock for each customer. (*Method: dashboard_rep_top_facilities*)		
	None	None
Transactions per store: Shows a table of all transactions per store within the past 7 and 30 days (*Method: dashboard_rep_month_transacs*)		
	store_tags	A comma-separated list of tags - or omit this parameter if you want to show stock for all stores.
Vital items in stock: Shows a bar graph of the percentage of medicines of the chosen category in stock at each facility. (*Method: dashboard_store_stock_percent*)		
	ven_category	v or e or n if you want to include items that are Vital or Essential or Necessary
	user_field_4	TRUE if you want to include items with this field checked

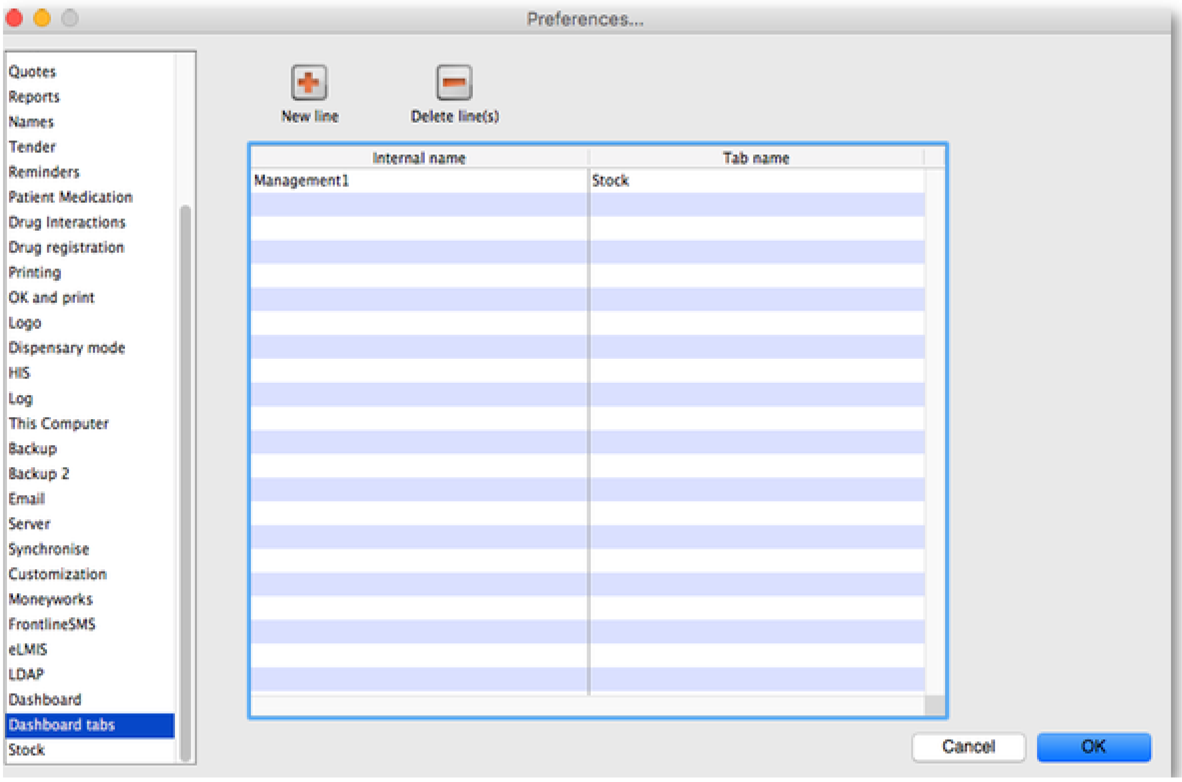
Report name	Property	Value
	user_field_7	TRUE if you want to include items with this field checked Note that the labels for fields 4 and 7 may be different, as they are set up in the mSupply preferences (misc tab)
	critical_stock	TRUE if you want to include items with this field checked, false for all items
	store_tags	entering `healthcentre` will only include stores with the “healthcentre” tag
Map stock on hand: Shows a map of the area specified, with an “X” if the facility is out of stock of the item, or a dot representing the amount of stock on hand. (*Method: dashboard_map_stock_on_hand*)		
	lat_nw_corner	the latitude of the North-West corner of the map
	long_nw_corner	the longitude of the North-East corner of the map
	lat_se_corner	the latitude of the South-East corner of the map
	long_se_corner	the longitude of the North-East corner of the map
	item_code	the item code of the item to display
	country	compulsory parameter
	store_tags	A comma-separated list of tags - or omit this parameter if you want to show stock for all stores
Sync sites last connection date: Shows the last connection date and current mSupply version of each sync site. (*Method: dashboard_report_last_sync_date*)		
	None	None
Sync sites sent and received statistics: Shows number of records sent and received by each syc site within the last day. (*Method: dashboard_report_sync_stat*)		
	None	None
Stock_for_category_1_stores_by_item_list: Shows… (*Method:* -)		
	None	None
Trends in critical stock: Shows the historical stock on hand using parameters to filter store and/or items. Will show the current percentage, and percentages from the last day of each month for the prior six months. (*Method: dashboard_rep_in_stock_trends*)		
	store_id	the ID of the store you're interested in, or no value for all stores
	critical_stock	TRUE if you want to include items with this field checked, false for all items
	Output: use the type “time_series_chart”	
Reports Monthly Transactions Shows how many transactions of each type the chose store has processed this month (*Method: dashboard_rep_month_transacs*)		
	store_name	the name of the store which you are interested in, or no value if you want all stores
Items Issued This Month: Shows items issued by the facility within the last 30 days. (*Method: dashboard_itemRow_storeCol_usage*)		
	store_tag	include stores with this tag
	master_list	include items on this master list
	period	`30` (currently only 30 days is supported)
Stock each item in each store: Shows a table of items in rows and stores in columns, with the stock on hand for that item in that store in each cell. (*Method: dashboard_rep_stk_StoreCols_Itm*)		

Report name	Property	Value
	store_code	store code attached to the store. multiple stores can be specified by adding more parameters that begin with store_code (e.g. store_code2). The item_code parameter must be specified if using store_code
	item_code	items whose code matches this code (append “@” for a “starts with” search)
	master_list	selected master list of items. Category1_description must be specified if using a master_list
	Category1_description	Items with this category1
Unfinalised Stock Transfers: Table of unfinalised stock transfers (between mSupply stores) for each facility. (*Method: dashboardReportUnfinalisedStock*)		
	store_tags	(optional) A comma-separated list of tags - or omit this parameter if you want to show transfers for all stores.
	days_older_than	(optional) show only transactions that are older than this value (days).

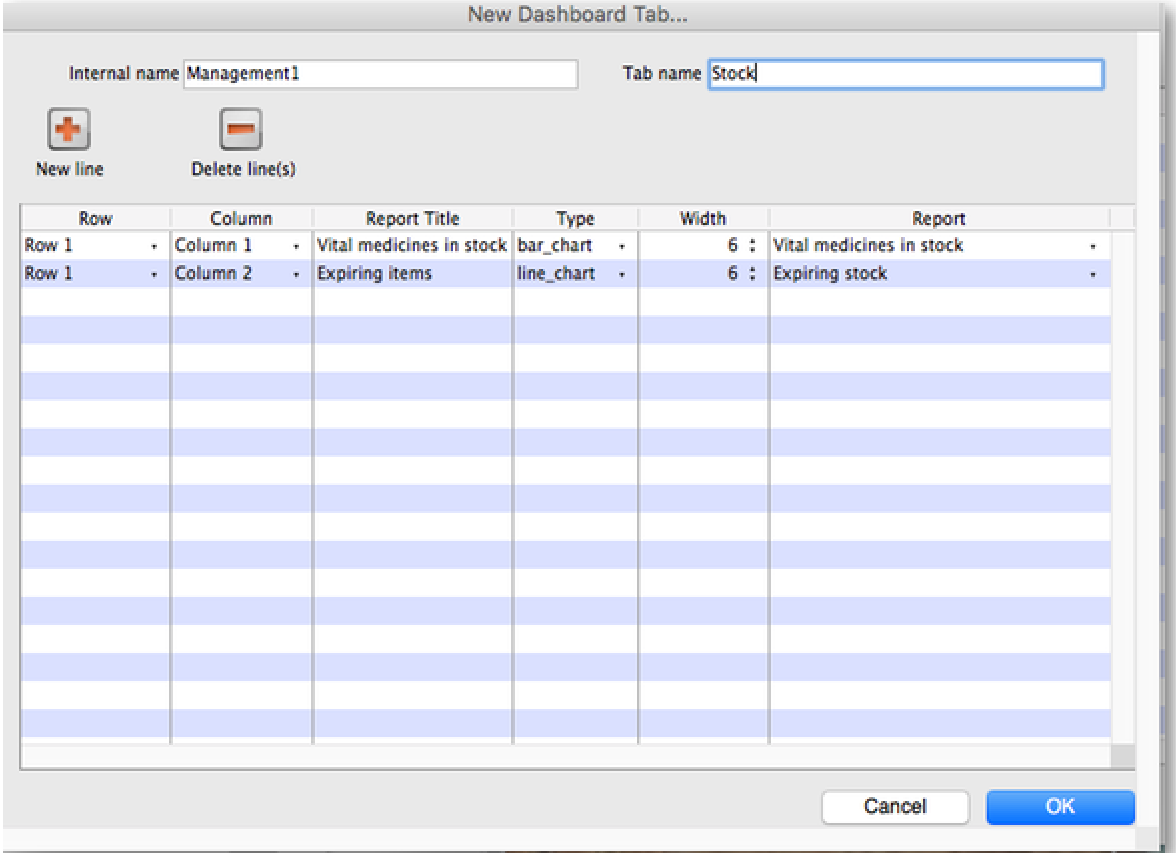
If you can't make a dashboard report that does what you want then please speak to us, it's usually a fairly simple matter for us to create one for you.

Dashboard tabs

You set up Dashboard tabs which will display on your dashboard. Dashboard tabs are “containers” for one or more dashboard reports. To edit them go to *File > Preferences* and click on the *Dashboard tabs* tab on the left hand side:



To add a tab click the **Add** button. To edit a tab, double-click it. You will be shown a window for editing a dashboard tab:



Now you add reports that will show on this tab.

Understanding rows and columns

Take this example dashboard tab:

- The tabs themselves occupy their own space on the left of the window- they aren't considered when laying out the dashboard
- The first row has two reports- each report takes up half the row. So for the first report:
    - Row 1, Col 1, width 6 (“12” means it takes up the full width of the cell it is in- “4” would mean it would take up 1/3 of the width)
- For the report at the top right:
    - Row 1, Col 2, width 6
- For the map
    - Row 2, Col 1, width 12
- The next two reports are on the same row, but are divided into 5/12 and 7/12 of the width of the window, so we put them in the same cell but change the width settings:
    - Row 3, Col 1, width 5
    - Row 3, Col 1, width 7

To add a report to a dashboard tab

Click **New Line** to add a new report to the tab. Then edit the values in each column

- **Row:** The row it will be in
- **Column:** The column within the row- set to “1” if you don't have multiple reports on this row.
- **Report tite:** The title that will show in the Orange heading bar for the report. Note that the same report can display different information depending on the parameters you set for that report- hence the need for the ability to customise report names
- **Type:** You'll need to know the appropriate type for the report you're displaying. The options are
    - bar_chart
    - table
    - pie_chart
    - time_series
    - map
    - line_chart
- **Width:** The fraction of the cell width in “twelfths” that this report will take up (“6” will make it

take up half the cell width)
- **Report:** Choose the report name from the drop-down list of available reports

Add a dashboard tab to a user's dashboard

This is the final step in setting up dashboards: once the tabs have been setup you have to choose which users will see which tabs. You do this in individual users' settings. See managing users for instructions on how to do this.

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