

# 25.01. Miscellaneous topics

## Inactive logout

You can set mSupply to log an inactive client out after a customisable length of time. Set the length of time in general preferences.

The screenshot shows the 'Preferences...' dialog box with the 'General' tab selected. The left sidebar lists various settings categories. The main area is divided into sections: 'Organization details' (with fields for Organization name, Address line 1-5, and Postal/Zip Code), 'Default values...' (with fields for Default currency, Default customer, Default margin for suppliers, and Default tax rate), and 'Period closing...' (with fields for Closed date and Locked date). A section titled 'Inactive user logout' is highlighted with an orange border, containing a single field: 'Close mSupply if user is inactive for 0 minutes'. At the bottom right are 'Cancel' and 'OK' buttons.

## End of month tasks

We are presuming that you will finalise and export your invoice data once a month. If you choose a different frequency, you should still follow the same procedure.

Tasks to perform:

- Check your invoices are correct. Once you have finalised an invoice, it can not be edited.
- Finalize and export supplier invoices. See the file menu chapter.
- Finalize and export customer invoices. See the file menu chapter.
- Record the stock on hand value (this is only necessary if your accounting system requires the information). See the special menu chapter.

Hints:

- Each month, take your finalised invoices and file them. We suggest you file invoices in order of their invoice number (a separate file for supplier and customer invoices).
- Keep a file with the summary printout from each month produced when you finalize invoices.

## End of year tasks

It is usual to run according to a financial year. mSupply does not require you to delete records or perform special operations for the end of the financial year. If you want to, you can just carry on using mSupply as usual.

However, there are certain procedures that will improve operation, and make an audit of your operation easier.

1. Perform a stocktake.
  1. Finalize all outstanding invoices. Use the **Finalize Customer invoices ...** and **Finalize Supplier invoices...** commands to do this. (Note that any customer invoices with a status of "sg" ("suggested") must be confirmed before they can be finalised or exported.)
  2. Create stocktake sheets to record differences easily between actual stock and stock according to mSupply. See the stocktake sheets section of the "Report menu" chapter.
  3. Use inventory adjustment transactions to correct errors. See the Inventory adjustment- add stock and the Inventory adjustment- reduce stock sections of the "Item menu" chapter.
  4. Finalize inventory adjustments. Use the Finalize inventory adjustments command to do this.
2. Make a backup copy of mSupply as it stands at year-end. It is a good idea to keep this backup in a secure place for long term storage.
3. Print a ledger for each item. Choose "print item ledger" from the "report" menu. You can use your backup copy of mSupply to print this ledger at a later date.
4. Choose "set start of year stock" from the "special" menu. This simply records the date and next transaction number, and records the total opening stock quantity for each item to allow a ledger calculation for the coming year.
5. You are now ready to begin entering transactions for the next year.

## Maintenance and repair

If you are using your data file regularly, it is a good idea occasionally to check that no problems have developed. Problems can develop due, for example, to faulty hardware and other reasons outside our control.

### For technically competent users or professional IT staff

In the case of a serious hardware failure, the first option should always be to revert to the last known good backup of your data.

If for some reason you must repair a damaged data file, please contact Sustainable Solutions for advice.

To check your data, download a product called *4D Tools* . (4D Tools and a manual is included on the CD) from <ftp://ftp.4d.com>.

*4D Tools* can simply check your data file for errors, or repair your file. Please contact Sustainable Solutions if you believe your data file has a problem, before repairing it.

Always use *4D Tools* on a backup copy of your data first.

If *4D Tools* is unable to repair your data, Sustainable Solutions is able to use specialist tools to examine your data, and even export your data and re-import into a new data file. We have not had to do this for a customer yet, but the option is available as a near-last resort.

## How do I move a window whose title bar has been hidden?

On Windows:

- Method 1: Press Ctrl and both mouse buttons, and drag the window to the new location.
- Method 2: Press Alt-Ctrl-right mouse button, while dragging the window to the new location.

On Mac OS

- Press Control-Command-mouse button, and drag the window to the new location

## Security of your data

If you maintain the mSupply password system carefully, your data is fairly secure.

Note, however, that if a person has access to the original copy of mSupply, they will easily be able to open the data file, as the “user 1” password is clearly shown in the password entry screen until it is overwritten the first time you click “OK”. It is your responsibility to keep copies of your mSupply software and data in a safe place.

As of version 1.4, passwords stored in the data file are encrypted with strong (512 bit) RSA encryption, so there is little danger of someone finding your password.

## Supervisor mode - all stores

mSupply was initially designed to maintain data relating to a single store in each data file, and for many users, this is how mSupply continues to be used.

Version 2 (and later) now meets the requirements of organisations/institutions operating with more than one store. Normally you will log into a particular store when starting mSupply, and only see stock and transactions relating to that store. However, users can be given the permission to [login](#) in as *Supervisor - All stores*. In this mode, users may now access data relating to more than one store - either selectively or cumulatively.



Any user in 'Supervisor - All stores' mode will only see the stores they are allowed to log into in the list of stores to select from.

## Reporting

In this mode, all of the report dialogue boxes relating to stock will display an additional panel. See the example below of an organisation having four stores - General, Northern Medical, Southern Medical and Island Medical.

The store(s) to be included in the report should be selected in the normal way by clicking with the mouse; to select more than one store, hold down Ctrl (Windows) or Cmd (Mac) while clicking on the desired store(s).

Show current stock...

Item filter

Report on items whose

Item code

starts with

and

Category is

Don't Care

and

VEN Category

Don't Care

and

Department is

Don't care

Filter by actual stock location

equals

Filter by location type

Don't care

Randomly select

0

stock items from returned list.

Sort report by:

☒ Item name

☐ Shelf Location

☐ Exclude Ad hoc and non stock items

☒ Exclude hidden items

Report format:

☒ Each batch shown separately

☐ Total stock for each item

☐ Each batch with prices

☐ Donor tracking

☐ Item in rows, Donor in columns

☐ Item in rows, Store in Columns

Store code.	Store name.
OPD	Outpatient Disp
IPD	Inpatient Disp

Magnifie

☐ Open report in Excel

Cancel

OK

Note also that when you search for items, the filter window has the same store selection:

The screenshot shows a 'Find Item...' dialog box with the following fields and options:

- Item name: starts with
- and: category is
- and: VEN category is Don't Care
- and: Department is Don't care
- Randomly select 0 items from returned list.
- ☒ Exclude hidden items
- Code list: AYEYAR\_NMCP, AYEYAR\_NTP (selected), BAGO\_E\_NMCP
- Buttons: Complex Find, Cancel, Find, Bigger List

The item search filters will be applied to items visible in the stores selected only. If there are a lot of stores in the datafile you can click on the *Bigger List* button to select the required store(s) in a separate window.

## Ordering stock

In *Supervisor - All stores* mode you can also create Purchase Orders that will be based on data for all stores, and can specify delivery destinations for different lines within the order.

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