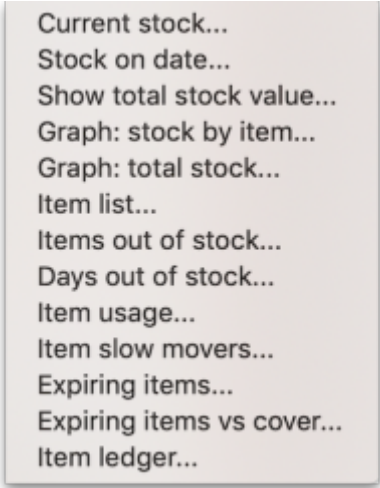
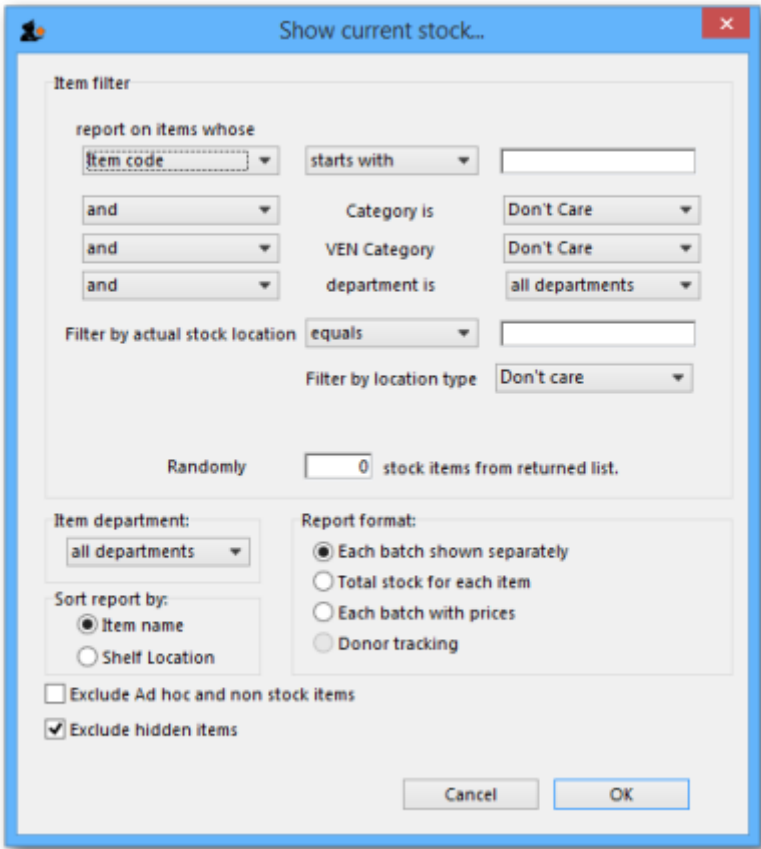


# 13.02. Stock and items reports

When **Reports > Items and Stock** is chosen, a range of available reports are displayed; click on the one you require to select it:



## Current stock



A report will be produced that lists each stock line that is currently showing stock greater than zero. Should you wish the report to include items/batches with zero stock, the box in the lower left needs to be checked.

## Item filter

A “Find” report allows you to enter the normal item find criteria to choose which items to include.

A random report allows you to enter a number only. That number of items will be randomly chosen, and stocktake sheets for those items printed. This facilitates spot checking of your actual stock situation.

## Additional options

Should you wish the report to be department specific, then that department should be selected from the drop down list of the departments which you have created.

Should you wish the report to give information on a particular location, then that location should be specified , selecting the appropriate operator of the three available in the drop down box alongside the *Filter by actual stock location* option.

## Report format

You can choose from three formats:

- “Each batch shown separately” will also give you a column on the right where, having done a physical stocktake, you can enter the quantity that is actually in stock, allowing any corrections to be made in mSupply.
- “Total stock for each item” will not show individual batches, but the total quantity on hand of each item.
- List the price of each batch in stock, with a total at the end of the report.

The lines are reported alphabetically either by item name or shelf location, depending on what you have chosen in the “Sort report by” options

## Donor reporting

mSupply provides the feature of printing the Donor name on the Current Stock report so that organisation donating the goods can be identified and tracked.

**Stock detail for store(s) General**

Loc	Item Name	Batch	Expiry Date	Pack	Quan	Actual Stock	Donor
Main-8-3-1	Amoxicillin 500 mg	AB00251J	30/08/15	1.00	4,670,400.00	-----	
	Amoxicillin 500 mg	batch	01/01/15	1.00	20.00	-----	Donor
	Amoxicillin,dry powder for Suspension 125mg/ 5ml	1264-0366	30/04/15	1.00	30,000.00	-----	
	Amoxicillin,dry powder for Suspension 125mg/ 5ml	1012-0666	31/03/15	1.00	28,522.00	-----	
	Amoxicillin,dry powder for Suspension 125mg/ 5ml	1012-0666	30/05/15	1.00	51,000.00	-----	
	Amoxicillin,dry powder for Suspension 125mg/ 5ml	1012-0666	31/05/15	1.00	65,880.00	-----	
	Amoxicillin,dry powder for Suspension 125mg/ 5ml	same	01/01/15	1.00	12.00	-----	SAMES
	Amoxicillin/Cloxacillin Potassium 500 mg/ 125 mg	1148019	31/08/14	1.00	92,500.00	-----	

## Stock on date

This report allows you to produce a report for the stock in your store on a particular date. You are shown a window like this:

**Stock report on a particular date**

Show stock value on  Today

Type of report

☒ Show items only

☐ Show items with batches

☐ Show batches with Summary

Report on items whose...

Item code starts with

and Category 1 is

and VEN category is

and Department is

and is on Master List

☐ Include item with no stock

☒ Exclude Ad hoc and non stock items

☒ Exclude hidden items

☐ Open report in Excel

Enter the date for which you wish to show the stock.

## Type of report

You have 3 options:

1. *Show items only*: each item in your system will have a single entry with the total quantity on that date.
2. *Show items with batches*: each batch, its expiry and batch number along with the quantity of stock will be shown.
3. *Show batches with summary*: as 2, but every item has an aggregate line before the lines for

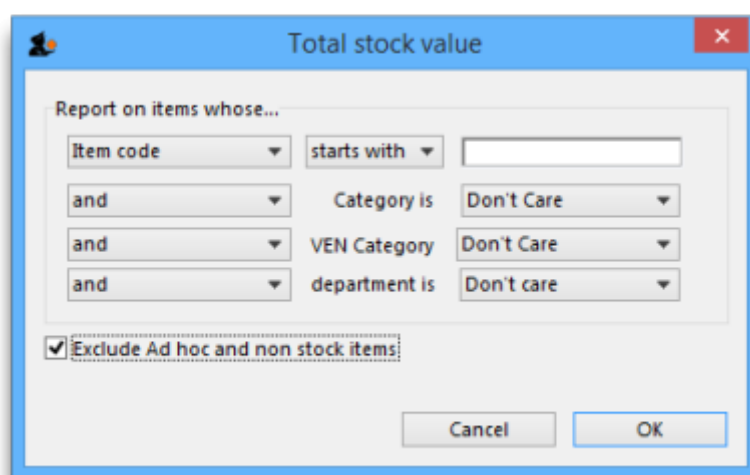
each batch, showing the total quantity for all batches of the item. So it's a bit like a combination of 1 and 2.

The *Report on items whose* box allows you to restrict the report to certain items only, using item properties or different categories as filters.

## Open report in Excel

Check this checkbox to view the report directly in your chosen Spreadsheet program.

## Show total stock value



This report is used to find the total stock value either for a particular department or all departments. The drop down menus allow customisation of your report by entering appropriate search criteria from the many options.

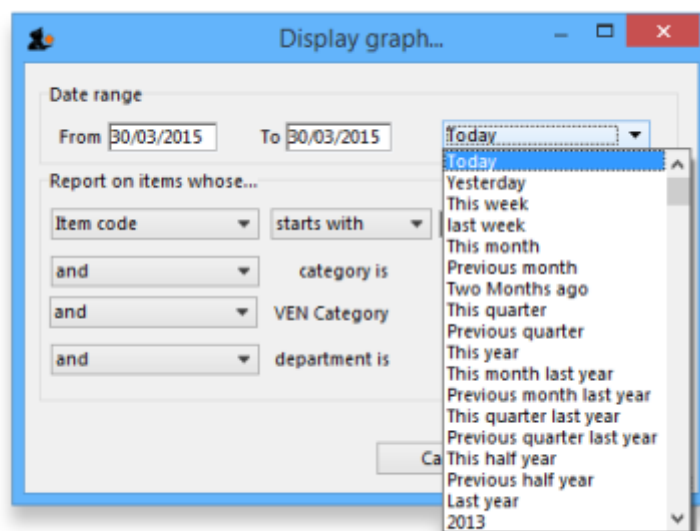
Check this checkbox to directly open the report in Excel rather than printing.

## Graph: stock by item

This report shows a graph for an item or items showing the quantity of stock on hand for each day over a defined period.

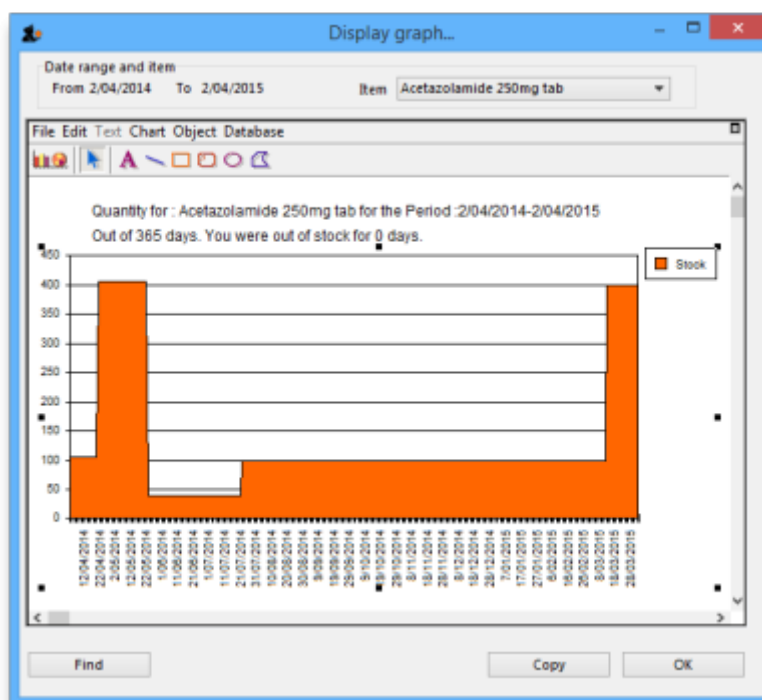
Note that if you have allowed editing of *confirm dates* on transactions, mSupply's ability to calculate accurately the data used in this report may be affected.

Choosing this item from the menu displays this window:



Enter the date range, or select the required period from the drop down list, the items on which you wish to report, and appropriate filters, if any. Remember you can use the item flag field to select an ad hoc list of items to include in your report.

Clicking OK displays a window where you are shown a graph of the quantity in stock on each day for the first item that matched the criteria you entered.

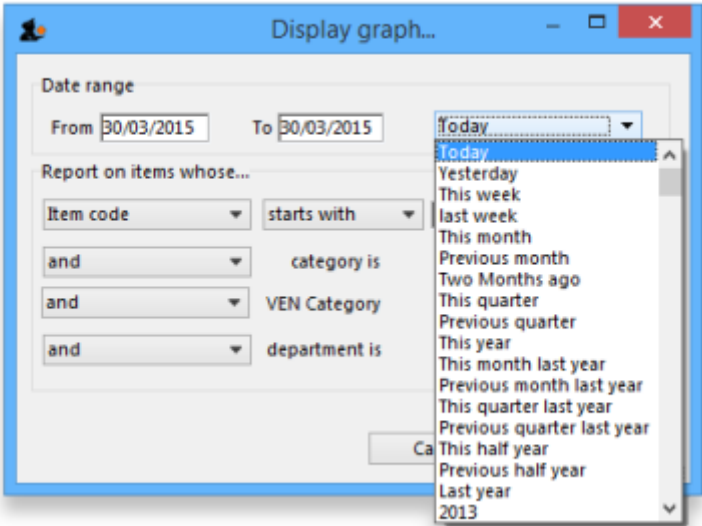


This window also displays a list of items that were found. To display the graph for a different item, choose it from the list.

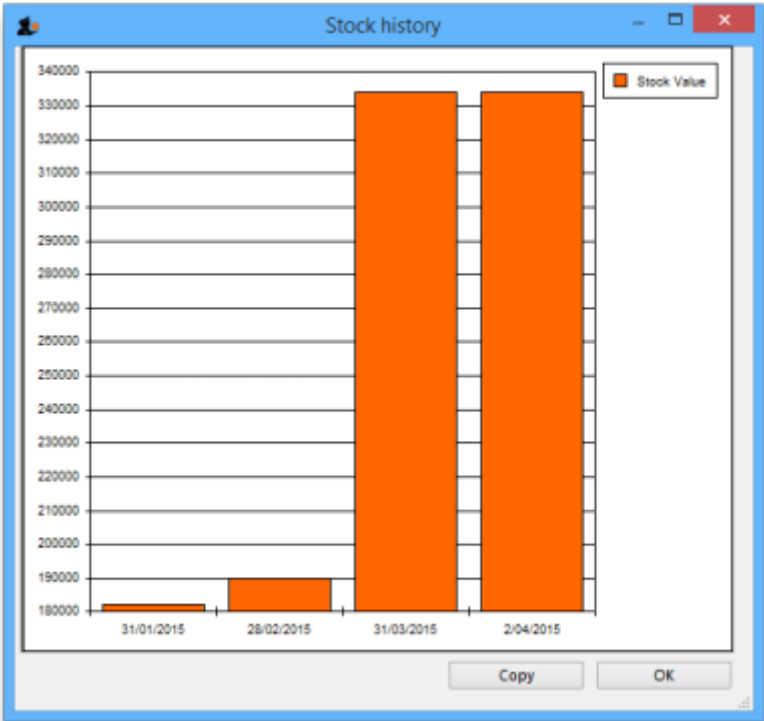
This report can be used as one of a set of key indicators for performance of a facility by comparing days out-of-stock of key items from one year to the next.

## Graph: total stock

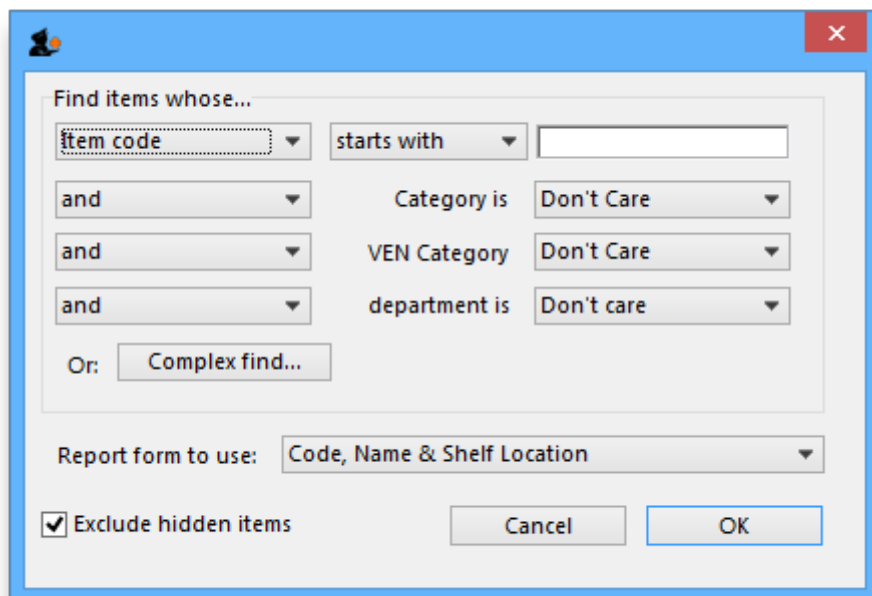
The total stock graph report allows you to view the value of your stock over a desired period of time. When you choose total stock graph, you are able to enter the required period which you would like to view:



Select OK and a graphical stock history report showing stock value will be displayed



## Item list



Find items whose...

item code starts with

and Category is Don't Care

and VEN Category Don't Care

and department is Don't care

Or: Complex find...

Report form to use: Code, Name & Shelf Location

☒ Exclude hidden items

Cancel OK

This report allows you to view an on-screen or printed list of items.

There is only one report layout listed in the window, but please tell us what you would like, and we'll consider adding it.

### Local / remote report

This option will only show "local data" as an option unless you purchase a web services enabled version of mSupply, in which case you can view reports from remote locations running mSupply. Contact us for more information.

### Items out of stock

Selecting this report displays this window:

Find items whose...

Item code

starts with

and

Category is

Don't Care

and

VEN Category

Don't Care

and

department is

Don't care

Or:

Complex find...

Report form to use:

Code, Name & Shelf Location

☒ Exclude hidden items

Cancel

OK

Specify your required options from the drop down lists;

Days out of stock

Selecting this report displays this window:

Report options

Days out of stock report

For each item, show how many days it was either in stock or out of stock for the chosen time interval

Include items whose...

Item code

starts with

and

Category is

Don't Care

and

VEN Category

Don't Care

and

department is

Don't care

No. of items with these criteria:

0

Unit Price

☐ Last price paid

☐ Average price

☐ According to supplier quote

Date range

From

24/02/2015

To

24/02/2015

Today

Items with

% of maximum stock are out of stock

Further options...

☒ Exclude Ad hoc and non stock items

☒ Exclude items if "never order" is checked

Complex Find

☐ Open report in Excel

Cancel

OK

Specify your required options from the drop down lists; the desired period may be identified either by entering dates in the *From* and *To* fields, or by using the drop down list to the right.

https://docs.msupply.org.nz/

Printed on 2024/05/13 20:39



Clicking ok will generate a report like the one below:

Days out of Stock Report						
From : 01/02/2015 To : 10/03/2015						
Item/s with less than 5% of maximum stock are out of stock						
Page 13 of 74						
Item Code	Item category	Item Name	Days out of stock	Days In Stock	Max Stock	O/S level
4141	Medical Supplies	CANNULA, INTRAVENOUS 16G GREY	0	28	12000	600
4142	Medical Supplies	CANNULA, INTRAVENOUS 16G GREEN	0	28	17718	885.9
4143	Medical Supplies	CANNULA, INTRAVENOUS 20G PINK	0	28	31606	1580.3
4144	Medical Supplies	CANNULA, INTRAVENOUS 22G BLUE	0	28	25579	1278.95
4139	Medical Supplies	CANNULA, INTRAVENOUS 24G YELLOW	0	28	13320	666
4145	Medical Supplies	CANNULA, OXYGEN NASAL	0	28	1538	76.9
1966		CANNULATED DRILL MACHINE, BATTERY OPERATED (INCLUDING HAND PIECE,JACOB CHUCK,BAT	28	0	0	0
3416	Medical Supplies	CAP & FLOAT ASSEMBLY, SUCTION BOTTLE, OHMEDA	28	0	0	0
2786		CAPNOGRAPH MONITOR WATER TRAP/FILTER	28	0	0	0
2827		CAPNOGRAPH MONITOR WATER TRAP/FILTER	28	0	0	0
1181	Antituberculosis medicines	CARFEDOMYCIN INJ 1G	28	0	0	0
79	Antihypertensive medicines	CAPTOPRIL TABS 25MG	15	13	137500	6875
2878		carba	28	0	0	0
697	Ophthalmic	CARBACHOL INJ 0.01% 1.5ML	28	0	0	0
83	Anticonvulsants/Antiepileptics	CARBAMAZEPINE TABS 200MG	0	28	539000	26950
85	Thyroid antagonists	CARBIMAZOLE TABS 5MG	0	28	188200	9410
1194	Cytotoxics	CARBOPLATIN INJ 150MG IN 15ML	0	28	30	1.5
1180	Cytotoxics	CARBOPLATIN INJ 450MG IN 45ML	15	13	20	1
2749		CASTROVEDIO CORNEAL TREPHINE	28	0	0	0
2789		CATHETER CENTRAL VENOUS (ARROWS )SET	28	0	0	0
2419		CATHETER TROCAR , SHARP 18PG	28	0	0	0
2418		CATHETER TROCAR , SHARP 16PG	28	0	0	0

Clicking the **Complex find** button opens the Query Editor, allowing you to enter specific criteria relating to your search.

You may also specify what level in percentage terms of the maximum stock should be considered as being “out of stock..” Here's an example over 1 month:

Day of month	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
stock on hand	20000	20000	20000	2000	1000	500	300	200	30000	25200	20200	18000	18000	18000	10000	5000	5000	2000	2000	800	800	20000	20000	20000	20000	20000	20000	20000	20000	20000
Out of stock									This day had maximum stock. 5% of 30000=1500																					
Note the 5% stock out level = 1500																														

Item usage

This report gives you a breakdown of item usage for the last few months, with summaries for the last 2 years, It also includes stock on hand and stock on backorder for each item in the report.

The report produced is very useful for forecasting or for seeing a list of items that need to be ordered.

When you choose the menu item you are shown a window like this:



make your selection from the names given to custom item fields in the Preferences if this feature has been used.

If you wish to use shelf locations, then select the *shelf location* option and specify the desired shelf.

You can use the drop-down list to find Items with a particular code, or to use the values you have entered into one of the custom user fields. If this isn't powerful enough, use the *complex find* button to display the full query editor.



Click the refresh button to calculate the number of items these basic parameters will find. This screenshot shows that 17 items meet the parameter specified, i.e. items whose names begin with 'pro';

### Only include items whose stock cover is less than...

If you want only to report on items whose stock is low, enter the threshold for days of stock on hand into the second field. For example, entering 90 into this field will only include items in the report whose stock is not sufficient to cover average usage for the next 90 days.

Enter "0" (zero) for this field to report on items with any amount of stock remaining.

### Include items with no usage in the last 12 months

If this box is checked, items with no usage over the last year will be included. This check box will have no effect if the previous "days cover" field is filled in, as an item with no usage will have "infinite"

cover- any stock you do have is going to last you forever!

Include usage for build ingredients

If you manufacture items, you can choose whether the use of ingredient lines in manufacturing is included in the report or not.

Open report in Excel

Checking this box opens the report in Excel (or any installed spreadsheet program).

Note: If you chose the **Item usage [Excel] report** from the dropdown list, the Excel box will already be checked.

If you want to save the report in Excel (or any installed spreadsheet program), choose File > Save as.

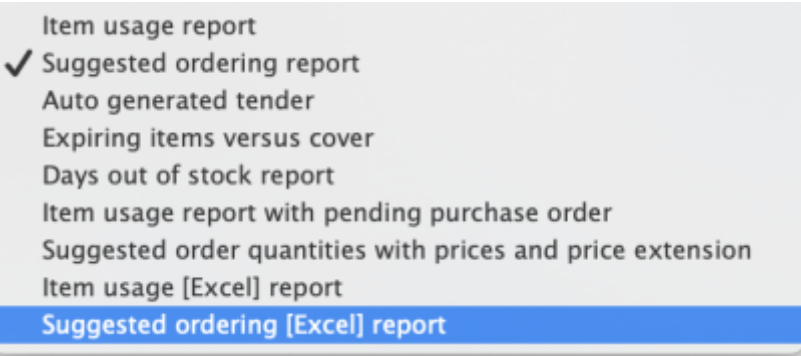
Item usage report preview

Item Usage Report ----- Months cover : 0 Search string : All Items												
code	Item	in stock	Stock on order	12 month average	24 month average	Months cover	This month	Last month	3 months ago	4 months ago	5 months ago	6 months ago
3310	ABDOMINAL GAUZE(15XPOWDE) PES	2900	0	385	345	5.2	0	0	0	0	0	500
8	Acetazolamide tablet 250mg	2900	0	4	50	480	0	0	0	0	0	0
1010	ADRENALINE 1:3300, 1ml (N)	240	0	17	29	14	0	0	0	0	7	30
9	ALBENDAZOLE 200MG TAB	2200	0	1000	654	2.2	0	0	0	0	2800	1800
10	ALBENDAZOLE 400MG TAB	600	0	446	1877	1.3	0	0	0	0	180	400
2059	ALCOHOL 70% SB0ml	0	0	12	19	8	0	0	0	0	6	10
2021	ALCOHOL SWABS 100's	150	0	345	6117	0.5	0	0	0	0	141	419
1020	AMBROPHYLIN 250mg/30ml, INJC	594	0	9	24	66.2	0	0	0	0	0	17
30	AMTRIFITYLINE 25mg TABLET	2900	0	125	175	14.8	0	0	0	0	1000	0
3450	AMPHIOKID, DISPOSABLE	0	0	97	51	8	0	0	0	0	90	40
39	Amoxicillin-Clavul. Ac. 500/125mg	3450	0	854	973	4	0	0	0	0	300	1900
2040	AMOXICILLIN 325mg/5ml, STRIP	31	0	23	42	3.3	0	0	0	0	9	40
40	AMOXICILLIN 250mg TAB/CAP	286706	0	72725	89679	3.9	0	0	0	0	66490	91800
1030	AMPIICILLIN 1g INJECTION	1247	0	625	766	5.2	0	0	0	0	324	1301
50	ANTACID (MAG TRISIL CO) TAB	86100	0	25604	19224	5.5	0	0	0	0	8480	15250
2044	ANTI-HAEMORRHOID CREAM	301	0	10	11	28.9	0	0	0	0	0	0
COART12	ARTEMETER LUMEFANTRINE	219	0	49	586	3.5	0	0	0	0	70	90
COART18	ARTEMETER LUMEFANTRINE	200	0	56	305	3.6	0	0	0	0	40	70
COART24	ARTEMETER LUMEFANTRINE	130	0	45	368	2.7	0	0	0	0	20	44
COART5	ARTEMETER LUMEFANTRINE	463	0	59	305	7.8	0	0	0	0	180	85
1351	ARTESUNATE 200MG SUPPOSITORY	264	0	15	17	23	0	0	0	0	18	12
1329A	ARTESUNATE 50MG SUPPOSITORY	270	0	12	16	22.2	0	0	0	0	18	18
129	ARTESUNATE 80MG INJ	405	0	0	2	972	0	0	0	0	0	0
60	ASPIRIN 800MG TAB	84300	0	29325	22951	4.4	0	0	0	0	17800	21300
70	ATENCOL 50mg TABLET	13610	0	15106	2042	9	0	0	0	0	1090	300
1040	ATENCOL 5mg/ 30ml INJECTION	10	0	1	1	10.9	0	0	0	0	0	0
1000	ATROPINE 1mg INJECTION	453	0	28	40	18.1	0	0	0	0	20	40
1351	AUTOFLOWING TAMP	16	0	5	5	8.7	0	0	0	0	5	5
75	AZITHROMYCIN 500MG TAB	3952	0	906	1226	2.2	0	0	0	0	850	1480
4851	BACTERIAL FILTER MINI TRAP	0	0	34	34	0	0	0	0	0	0	20
3130	BANDAGE Crepe 10cm	92	0	170	276	0.5	0	0	0	0	87	19
3129	BANDAGE CREPE 15CM	85	0	36	29	2.4	0	0	0	0	24	50
3131	BANDAGE CREPE GCM X 4M	760	0	165	319	4.6	0	0	0	0	84	420
3342	BANDAGE GAZETE 10cm	280	0	277	798	1	0	0	0	0	250	340
3340	BANDAGE GAZETE 5cm	3186	0	215	179	14.8	0	0	0	0	112	336
3352	BANDAGE POP 30cm	36	0	27	42	1.4	0	0	0	0	0	14

Suggested ordering report

This report shows usage data, months cover of stock remaining and a suggested quantity to order for each item. The Purchaser can review this report to make a final decision on how much stock to order.

From the *Item usage report* dialogue box, select the **Suggested ordering report** option from the drop-down menu. Alternatively, select the **Suggested ordering [Excel] report** to create an Excel report.



Report options

Suggested ordering [Excel] report

Create a report to support ordering decisions. Customise the report by item name or code, or the number of days of stock cover required.

Include items whose...

Item code starts with (Leave this field blank to include all items)

and Category 1 is

and VEN Category Don't Care

and Department is Don't Care

No. of items with these criteria: 0

Unit Price

☐ Last price paid

☐ Average price

☐ According to supplier quote

Builds....

☐ Include planned builds

Make sure planned builds will be covered 1 times

Only include items whose stock cover (in months) is less than 0

Base analysis on 4 Months of usage data

Months stock required 3 Calculate

Expected delivery 17/10/19

☒ Include usage for build ingredients

☐ Include items with suggested zero order quantity

☐ Exclude transfers from usage calculations

☐ Exclude Ad hoc and non stock items

☒ Exclude items if "never order" is checked

☒ Exclude items which expire within 0 months

Complex Find ☒ Open report in Excel Cancel OK

Note the extra options for including item usage when calculating item ordering quantities. Also note the option to include ordering for build items. See [item builds](#) for more on built items.

Open report in Excel

Checking this box opens the report in Excel (or any installed spreadsheet program).

Note: If you chose the **Suggested ordering [Excel] report** from the dropdown list, the Excel box will already be checked.

If you want to save the report in Excel (or any installed spreadsheet program), choose File > Save as.

Suggested ordering report preview

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Suggested Ordering Report: Months cover : 24 months. Search string : amo. Based on last 12 months usage data.													
2														Page
3	Item Code	Item Name	VEN	Item category	Stock on hand	Backorder	12 months average	24 months average	Monthly usage for the last 12 months	Months Cover	Quantity on Order	Ordered quantity in use	Suggested order	Forecast used
4	Amosyr	Amoxycillin 125mg/5ml susp V	06.2.1 Beta Lact	4120	0	3297	3673	3549	1.2	40012	40012	41052	N	
5	Amo500	Amoxycillin 500mg cap V	06.2.1 Beta Lact	129000	0	90300	92159	96633	1.3	600000	600000	1590200	N	
6	Amclav	Amoxycillin+Clavulanate 500/E	06.2.1 Beta Lact	21600	0	2482	2283	2607	8.3	30000	30000	10960	N	

## Item usage with outstanding purchase orders

The window that appears when you choose this report is the same as the previous one; with exactly the same options available; the report produced differs only in that any lines having outstanding Purchase Orders have the relevant details of the Purchase Order displayed.

## Item slow movers

You will be shown a window to enter the item details:

**Item slow movers**

Report on items whose...

item code starts with

(Leave blank for all items- warning: may take a few minutes to produce the report for all items)

and Category 1 is

and Department is Don't care

and VEN Category Don't Care

and donor equals

Report on items that have more than 12 months stock on hand

☐ Open report in Excel

Cancel OK

Enter your search criteria in the top section.

### Item name field

- If you want a report for all items, leave this field blank. Otherwise enter some text to reduce the report to just a few items (e.g. entering "am" will produce a report of just the items whose name starts with "am" (Amitriptylline, Amoxycillin, etc)

### Category and department

- Use the drop down boxes as appropriate to select Category and/or Department if required.

### Months of stock

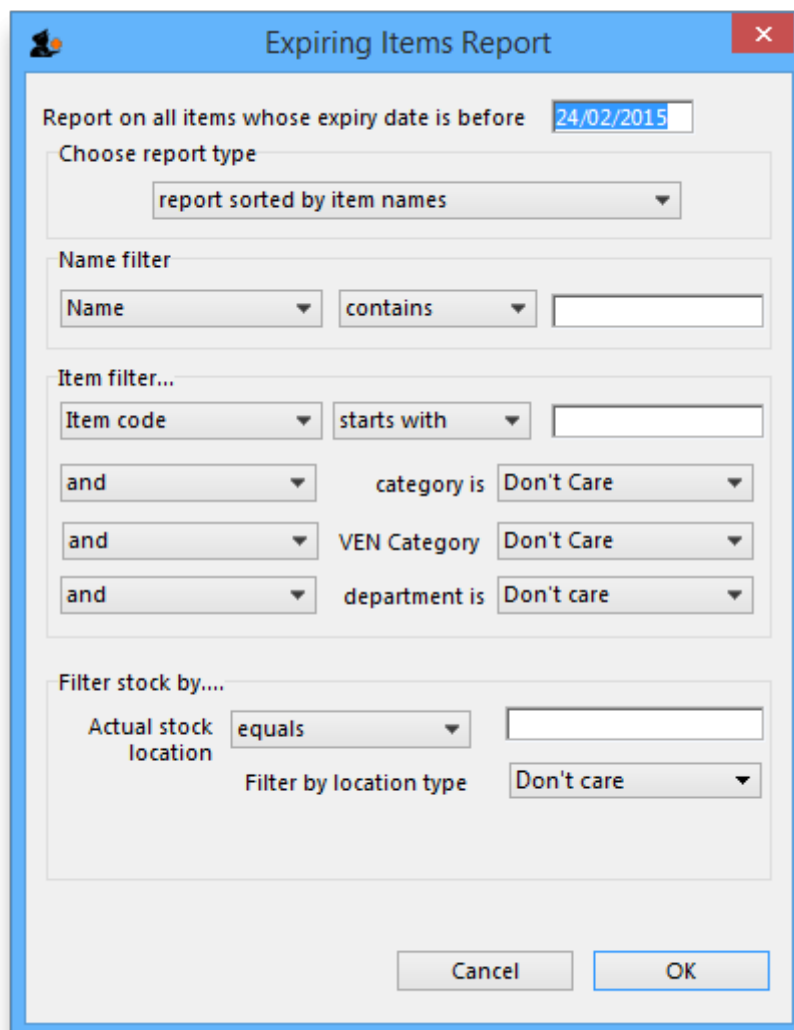
- Enter the number of months of stock to report on. Items with more than this number of months of stock on hand will be included in the report. The correct figure to enter here depends upon your desired stock turn. In general, if you are turning over your stock 3 or 4 times a year, you would want to know about items which have more than 8 months of stock on hand.

- The report is calculated using the last 12 months usage as a guide to the average monthly usage.

You can check the Open report in Excel box to open the report in Excel, or any installed spreadsheet.

The report produced is very useful for managing under-performing inventory. It allows you quickly to obtain a list of items where a reduction in stock is desirable.

## Expiring items



The image shows a software dialog box titled "Expiring Items Report". It contains several sections for configuring the report:

- Report on all items whose expiry date is before:** A date input field showing "24/02/2015".
- Choose report type:** A dropdown menu currently set to "report sorted by item names".
- Name filter:** A section with a dropdown for "Name", a dropdown for "contains", and an empty text input field.
- Item filter...:** A section with multiple filters:
  - "Item code" dropdown followed by "starts with" dropdown and an empty text input field.
  - "and" dropdown followed by "category is" dropdown set to "Don't Care".
  - "and" dropdown followed by "VEN Category" dropdown set to "Don't Care".
  - "and" dropdown followed by "department is" dropdown set to "Don't care".
- Filter stock by....:** A section with:
  - "Actual stock location" dropdown followed by "equals" dropdown and an empty text input field.
  - "Filter by location type" dropdown set to "Don't care".

At the bottom of the dialog are "Cancel" and "OK" buttons.

This report will ask you to enter a date, and will then give a report of all item lines in stock whose expiry date is before the date you have entered.

For example, entering 31/8/11 will display all items with expiry dates before 31st August 2011 (Enter the date in short format in the way your computer is set to handle dates (DD/MM/YY or MM/DD/YY or YY/MM/DD)).

You can additionally filter the stock by the location type or the actual location in the warehouse. This is helpful for reporting on items in certain sections of your warehouse.

Three report type options are offered; select as appropriate. You may refine the search by using the



Name filter and/or the Item filter..

Donor reporting

mSupply provides the feature of printing the Donor name on the Expiring Items report so that the organisation donating the goods can be identified and tracked. This can help with disposing of or returning goods to the Donor.

Expiry item - sort by item, for store(s) General

Item Code	Item	Supplier Code	Value	Quantity	Pack Size	Exp Date	Accumulative Value	Donor
03/0452	Amoxicillin 500 mg	Gen21	200.00000	20	1	01/01/15	200.00000	Donar
05/0457	Amoxicillin,dry powder for Suspension 125mg/5ml	SNG102	0.00000	12	1	01/01/15	200.00000	SAMES
03/0460	Amoxicillin/Clavulanate Potassium 500 mg/125 mg	NZ_001	16,850.00000	92500	1	31/08/14	16,850.00000	
Total Value			16,850.00000					

Expiring items vs. cover

This is a versatile report which allows you to see at a glance the amount of any stock items, and the number of months' cover provided by that amount of stock you have. **Note:** The cover calculation uses the last 12 months of usage data to calculate your rate of consumption.

Report options

Expiring items versus cover

Create a report on the usage of stock items. Customise the report to items based on name, code, usage frequency and/or stock remaining.

Include items whose...

Item code

starts with

(Leave this field blank to include all items)

and

Category is

Don't Care

and

VEN Category

Don't Care

and

department is

Don't care

No. of items with these criteria: 0

Unit Price

☐ Last price paid

☐ Average price

☐ According to supplier quote

Cover calculation

Include only transactions with the following category properties

Description

equals

Further options...

Only include items whose stock cover (in months) is less than

0

☐ Include items with no usage in the last 12 months

☒ Include usage for build ingredients

☐ Exclude transfers from usage calculations

☒ Exclude Ad hoc and non stock items

☒ Exclude items if "never order" is checked

Complex Find

☐ Open report in Excel

Cancel

OK

Many filters may be applied in the drop down lists, which are the same as described under Item usage... above.



Include items whose...

Essential Drug List

Item code  
Item name  
ABC category  
Shelf location  
Flag  
GL DESC  
FORMULARY  
SPECIALITY  
MAN ITEM  
Essential Drug List  
Critical stock  
Normal stock

equals  
equals  
starts with  
contains  
is not equal to  
does not start with

True  
True  
False  
Don't Care  
Don't care

with these criteria: 0

Only include items whose stock cover (in months) is less than 0

Note that If the field you are searching is a boolean field, e.g. Essential Drug List, “false” appears as the default entry, which you may change to “true”.

## Cover calculation

This allows the user to include or exclude specific categories to be used in calculating coverage. Clicking the magnifying glass to the right lists categories to be chosen.

If you wish mSupply to remember the criteria which you have entered, click on the paperclip icon, and your selections will appear the next time you open the report.

Once you have selected your required criteria, click on the *Refresh* icon to show the number of items which match your criteria, and which will, therefore, feature in the report.

## Item ledger

Ledger entries may be viewed in this report; different formats of report are available in addition to several filter options from the drop down lists, so the report may be designed to meet your specific requirements.

Previous: [13.01. Report basics](#) | | Next: [13.03. Transaction reports](#)

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