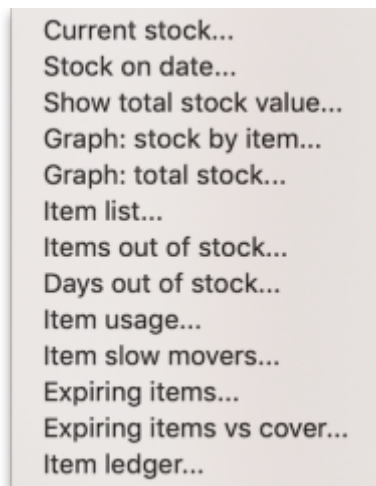
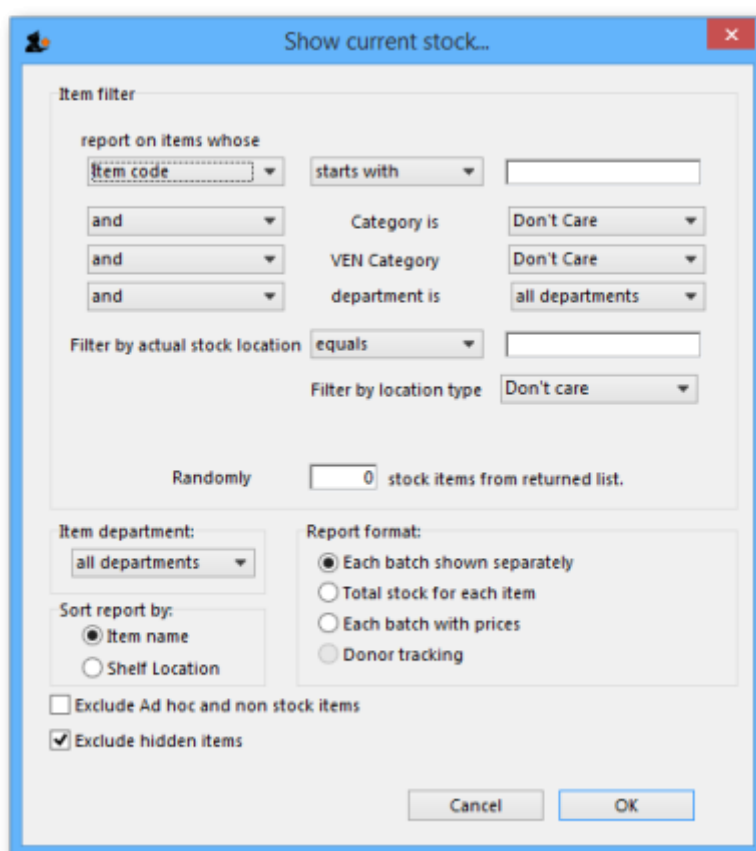


## 13.02. Stock and items reports

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

The 'Show current stock...' dialog box is shown. It has a title bar with a close button. The 'Item filter' section includes 'report on items whose' with a dropdown for 'Item code', 'starts with' with a dropdown and text input, and three 'and' dropdowns for 'Category is' (Don't Care), 'VEN Category' (Don't Care), and 'department is' (all departments). Below these are 'Filter by actual stock location' (equals) and 'Filter by location type' (Don't care). A 'Randomly' checkbox is next to a text input '0' with the label 'stock items from returned list.'. The 'Item department:' dropdown is set to 'all departments'. The 'Sort report by:' section has 'Item name' selected. The 'Report format:' section has 'Each batch shown separately' selected. At the bottom, there are checkboxes for 'Exclude Ad hoc and non stock items' (unchecked) and 'Exclude hidden items' (checked). 'Cancel' and 'OK' buttons are at the bottom right.

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 "Item filter" allows you to enter the normal find item filter criteria to choose which items to include.

## Random

A 'Randomly' filter allows you to enter a number of items that 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 | 1264-0866 | 30/04/15    | 1.00 | 30,000.00    | .....        |       |
|            | Amoxicillin,dry powder for Suspension 125mg/ 5ml | 1012-0866 | 31/03/15    | 1.00 | 28,522.00    | .....        |       |
|            | Amoxicillin,dry powder for Suspension 125mg/ 5ml | 1012-0866 | 30/05/15    | 1.00 | 51,000.00    | .....        |       |
|            | Amoxicillin,dry powder for Suspension 125mg/ 5ml | 1012-0866 | 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. The stock shown will be the stock at the END of the day. If you want to see the stock at the beginning of the day, choose the day before in the date selector.

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  
☐ Monthly stock & consumption history (Excel)



Months to look back



Report on items whose...

 starts with  

 Category 1  is  

 VEN category is  

 Department is  

 is on Master List  

☐ Include items 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 for.

## 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.
4. *Monthly stock & consumption history (Excel)*: Each item has 3 rows showing its consumption, days it was in stock and its mean stock on hand for each month from the current month to the number of months in the past selected in the **Months to look back** field.

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

If custom stock fields are set to be used in the datafile then they will also be shown in filters beneath the item filters.

## Open report in Excel

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

## Show total stock value

**Total stock value**

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 |

☒ Exclude Ad hoc and non stock items

Cancel OK

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.

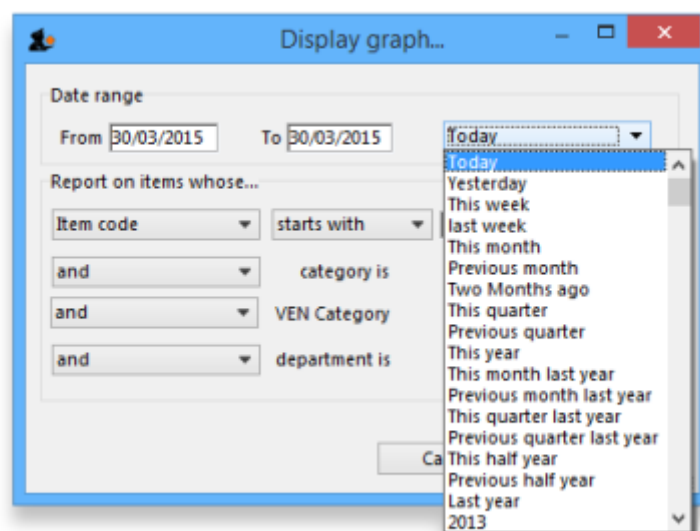
Check this checkbox to directly open the report in Excel rather than printing.

## 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.

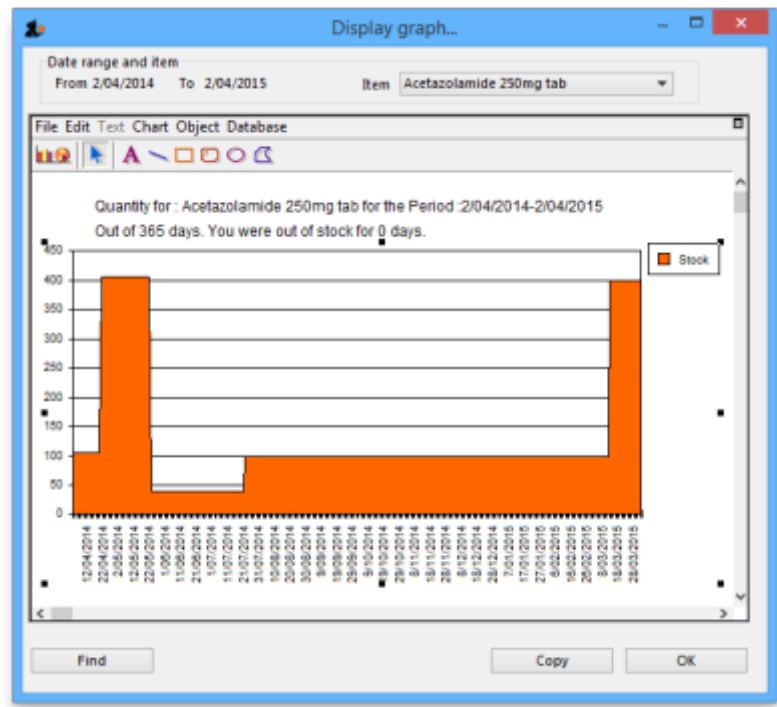
Note that if you have allowed editing of *confirm dates* on transactions, mSupply's ability to calculate accurately the data used in this report may be affected.

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.

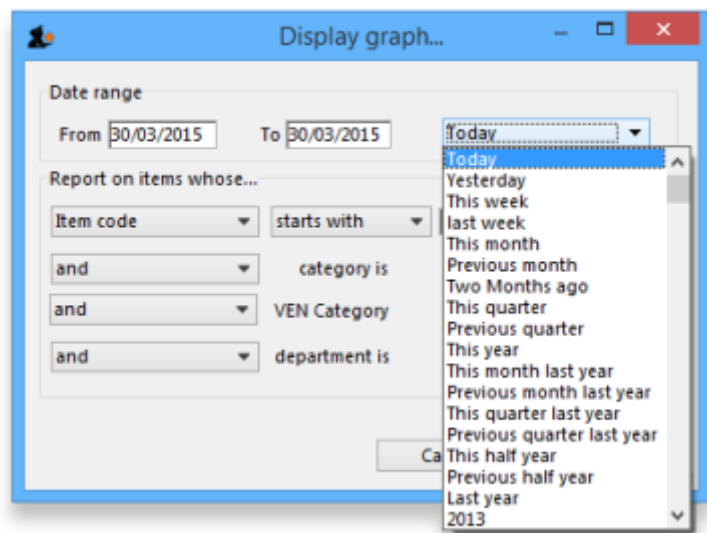


This window also displays a list of items that were found. To display the graph for a different item, choose it from the list.

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

A dialog box titled "Find items whose..." with a search criteria section and a report format section. The search criteria section includes a dropdown menu for "item code", a "starts with" dropdown, and three "and" dropdowns. The report format section includes a "Report form to use:" dropdown and a checkbox for "Exclude hidden items".

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 print a list of you items in certain formats.

There are 3 options in the **Report form to use** drop down list:

- *Code, Name and Shelf Location*: Shows exactly what is says with current stock on hand:

| Item list report: for store(s) Tamaki Central Medical Store |   |               |               |
|---|---|---------------|---------------|
| code  | item name   | Item Location | Stock on hand |
| 030063  | Acetylsalicylic Acid 100mg tabs                           | A1.B01.C3     | 199300        |
| 030062  | Acetylsalicylic Acid 300mg tabs                           | B1            | 4000          |
| 030453  | Amoxicillin 250mg tabs                                    | -             | 6506500       |
| 050457  | Amoxicillin Dry Powder for Suspension 125mg/5ml Bot/100ml | B1            | 420           |
| 041011  | Artesunate Injection Ampoule/60 mg                        | A1.B01.C3     | 5750          |
| 201116  | Bandage W.O.W. 15cm wide x 5m roll                        | A1.B01.C3     | 4308          |
| 047288  | Benzyl penicilin Injection 1000000 Unit                   | B3            | 850           |
| 047290  | Benzyl penicilin Injection 500.0000 Unit ( 300 mg )       | A2.01.C       | 50150         |
| 031661  | Captopril scored 25mg tabs                                | A2.01.C       | 47000         |
| 78373   | Clotrimazole cream 60 ml                                  | -             | 2300          |
| 042304  | Cloxacillin Sodium Injection Powder Vial/500mg            | A1.B01.C3     | 350           |
| 12653   | Cotrimoxazole syrup 5ml                                   | -             | 7350          |

- *Code, Name, Shelf Location with Item Long Description*: Shows the same as the previous one but includes the Item long description.
- *List of items in Catalogue*: Shows item details including the catalogue pack size and item custom field 6 value all separated out by the hierarchical item category 1. Looks like this:

| List of Items in Catalogue |   |                 |               |                        |
|----------------------------|---|-----------------|---------------|------------------------|
| Dressings                  |   |                 |               |                        |
| Dressings                  |   |                 |               |                        |
| DRESSINGS                  |   |                 |               |                        |
| Code                       | Description   | Item Category 2 | Catalogue VEN | Pack size user_field_6 |
| 201116                     | Bandage W.O.W. 15cm wide x 5m roll                        | V               | 12            | 534                    |
| Medicines                  |   |                 |               |                        |
| Anit-infectives            |   |                 |               |                        |
| ANTI-INFECTIVES            |   |                 |               |                        |
| Code                       | Description   | Item Category 2 | Catalogue VEN | Pack size user_field_6 |
| 050457                     | Amoxicillin Dry Powder for Suspension 125mg/5ml Bot/100ml | V               | 10            | 273                    |
| 042304                     | Cloxacillin Sodium Injection Powder Vial/500mg            | V               | 50            | 201                    |
| 047283                     | Penicillin Benzyl Penicillin PFI 1 MU+600 mg              | V               | 50            | 238                    |
| 047287                     | Penicillin Procaine Benzyl PFI 3 MU+3g                    |                 | 25            | 241                    |
| 038510                     | Potassium Permanganate Aqueous Solution 1:10,000          | E               | 1             |                        |
| 049542                     | Vancomycin HCL Injection Vial/250mg                       |                 | 1             | 264                    |
| 049543                     | Vancomycin HCL Injection Vial/500mg                       | E               | 1             | 265                    |
| ANTI-TUBERCULOSIS          |   |                 |               |                        |
| Code                       | Description   | Item Category 2 | Catalogue VEN | Pack size user_field_6 |
| 098350                     | TB Rifampicin+Isoniazid (R+H) 150/150mg tabs              |                 | 672           | 419                    |
| Cardiac                    |   |                 |               |                        |
| ANTI-ANGINAL               |   |                 |               |                        |
| Code                       | Description   | Item Category 2 | Catalogue VEN | Pack size user_field_6 |
| 030063                     | Acetylsalicylic Acid 100mg tabs                           | V               | 100           |                        |
| ANTI-HYPERTENSIVE          |   |                 |               |                        |
| Code                       | Description   | Item Category 2 | Catalogue VEN | Pack size user_field_6 |
| 031661                     | Captopril scored 25mg tabs                                |                 | 250           | 52                     |
| General                    |   |                 |               |                        |



## 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:



The screenshot shows a dialog box titled "Find items whose..." with a close button (X) in the top right corner. The dialog contains the following elements:

- A search criteria section with three rows of "and" connectors and dropdown menus for "item code", "starts with", "Category is", "VEN Category", and "department is". The "Category is", "VEN Category", and "department is" dropdowns are currently set to "Don't Care".
- An "Or:" section with a "Complex find..." button.
- A "Report form to use:" dropdown menu currently set to "Code, Name & Shelf Location".
- A checkbox labeled "Exclude hidden items" which is checked.
- "Cancel" and "OK" buttons at the bottom right.

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

(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

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.

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 18G 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      |
| 3986      |                                | CANNULATED DRILL MACHINE, BATTERY OPERATED (INCLUDING HAND<br>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     | CARVEDIPYIN 30J 1G  | 28                | 0             | 0         | 0         |
| 79        | Antihypertensive medicines     | CAPTOPRIL TABS 25MG   | 15                | 13            | 137500    | 68.75     |
| 2878      |                                | carba   | 28                | 0             | 0         | 0         |
| 607       | Ophthalmic                     | CARBACHOL 30J 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 (IN) 150MG IN 150ML   | 0                 | 28            | 30        | 1.5       |
| 1180      | Cytotoxics                     | CARBOPLATIN (IN) 450MG IN 450ML   | 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 10PG  | 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.

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

Printed on 2025/08/12 10:35

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:

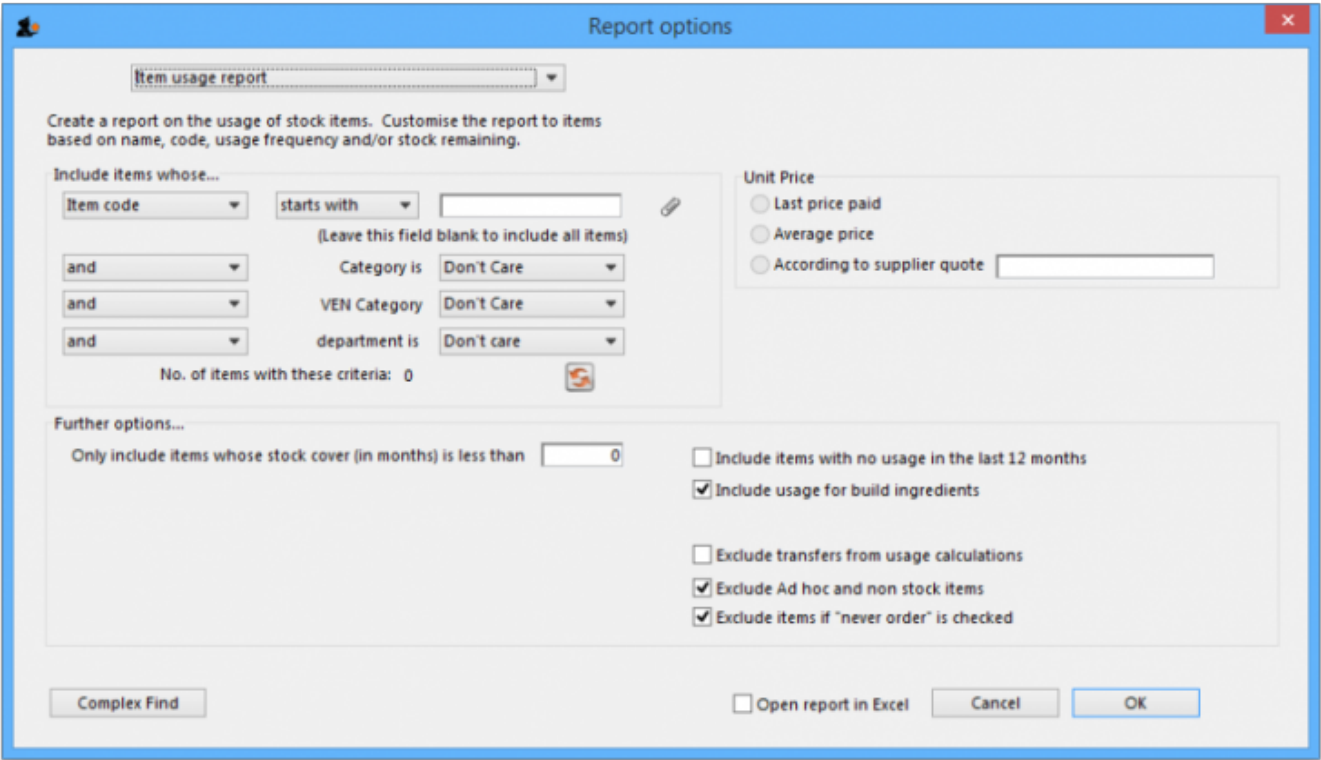
|                                    |       |       |       |      |      |     |     |     |  |       |       |       |       |       |       |      |      |      |      |     |     |       |       |       |       |       |       |       |       |       |
|------------------------------------|-------|-------|-------|------|------|-----|-----|-----|--|-------|-------|-------|-------|-------|-------|------|------|------|------|-----|-----|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| 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

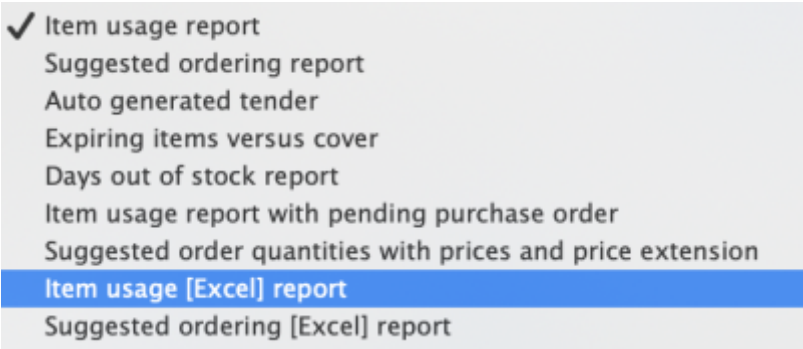
The Item usage report gives you a breakdown of item usage for the last few months, with summaries for the last 2 years, It also includes stock on hand and stock on backorder for each item in the report.

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:

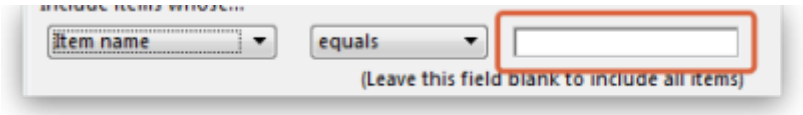


You can choose the type of report you want to run from the drop-down menu. Select the **Item usage [Excel] report** to create an Excel report.



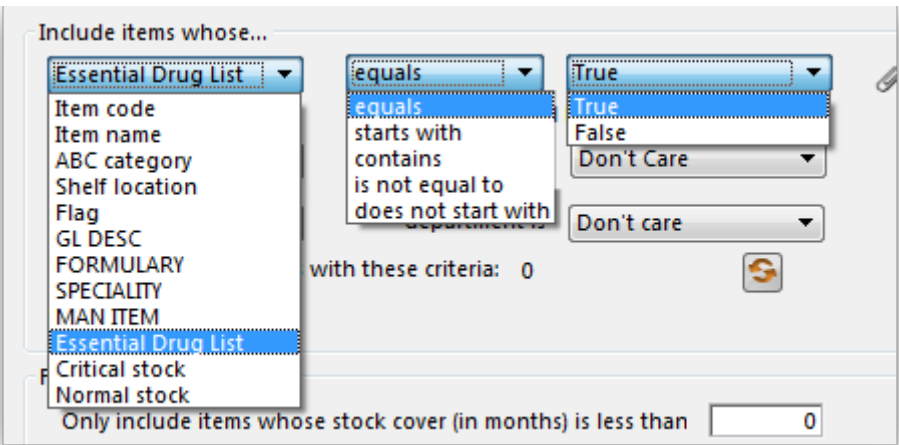
This menu also includes an item usage report, a suggested ordering amount report, or to auto generate a tender from the drop-down list at the top. This form is used for all 7 functions. (Note that the *Item usage report with pending purchase order* option will show you item usage with details of items currently on order and their expected date of delivery).

If you want to report on all items, leave the item name field blank:



otherwise enter an item name or code. For example, to report on amoxycillin stocks, you could enter “amox” into the field.

Depending on the entry in the first field, further options are available in the following two fields, but these will vary according to the entry in the first field. Among the options, he first field allows you to 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';

Include items whose...

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

and Category is Don't Care

and department is Don't care

No. of items with these criteria: 17

### 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.

The default of 0 (zero) in this field will include *all* 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 |
| 3110   | ABDOMINAL GAUZE(SPOUSE) PK5       | 2000     | 0              | 383              | 345              | 5.2          | 0          | 0          | 0            | 0            | 0            | 500          |
| 8  | Acetazolamide tablet 250mg        | 2000     | 0              | 4                | 50               | 480          | 0          | 0          | 0            | 0            | 0            | 0            |
| 3010   | ADRENALINE 1:1000, 1mL INJ        | 240      | 0              | 17               | 29               | 14           | 0          | 0          | 0            | 0            | 0            | 7            |
| 9  | ALBENDAZOLE 200MG TAB             | 2200     | 0              | 3000             | 654              | 2.2          | 0          | 0          | 0            | 0            | 2800         | 1400         |
| 10   | ALBENDAZOLE 400MG TAB             | 600      | 0              | 446              | 1877             | 1.3          | 0          | 0          | 0            | 0            | 100          | 400          |
| 2019   | ALCOHOL 70% 500ml                 | 0        | 0              | 12               | 29               | 0            | 0          | 0          | 0            | 0            | 0            | 6            |
| 2021   | ALCOHOL SWABS 100's               | 159      | 0              | 345              | 6117             | 0.5          | 0          | 0          | 0            | 0            | 141          | 419          |
| 3020   | AMINOPIRYLINE 250mg/10mL INJEC    | 554      | 0              | 9                | 24               | 65.2         | 0          | 0          | 0            | 0            | 0            | 17           |
| 30   | AMTRUPTYLIN 25mg TABLET           | 2000     | 0              | 135              | 175              | 14.8         | 0          | 0          | 0            | 0            | 1000         | 0            |
| 3450   | AMBIROCK, DISPOSABLE              | 0        | 0              | 37               | 51               | 0            | 0          | 0          | 0            | 0            | 10           | 40           |
| 39   | Amoxicillin+Clavul. Ac. 500/125mg | 3450     | 0              | 854              | 973              | 4            | 0          | 0          | 0            | 0            | 300          | 1980         |
| 2040   | AMOXICILLIN 125mg/5ml SYRUP       | 31       | 0              | 23               | 41               | 5.3          | 0          | 0          | 0            | 0            | 9            | 40           |
| 40   | AMOXICILLIN 250mg TAB/CAP         | 286700   | 0              | 72725            | 89079            | 3.9          | 0          | 0          | 0            | 0            | 66400        | 51800        |
| 3950   | AMPCICILLIN 1g INJECTION          | 3247     | 0              | 625              | 766              | 5.2          | 0          | 0          | 0            | 0            | 324          | 1301         |
| 50   | ANTACID (MAG TRISL CO) TAB        | 86100    | 0              | 15604            | 18124            | 5.5          | 0          | 0          | 0            | 0            | 8400         | 15250        |
| 2044   | ANTHRADEMORPHON CREAM             | 301      | 0              | 10               | 11               | 28.9         | 0          | 0          | 0            | 0            | 0            | 0            |
| COART12  | ARTIMETER LUMEFANTRINE            | 219      | 0              | 69               | 186              | 3.5          | 0          | 0          | 0            | 0            | 30           | 90           |
| COART18  | ARTIMETER LUMEFANTRINE            | 200      | 0              | 56               | 165              | 3.6          | 0          | 0          | 0            | 0            | 40           | 70           |
| COART24  | ARTIMETER LUMEFANTRINE            | 120      | 0              | 45               | 168              | 2.7          | 0          | 0          | 0            | 0            | 30           | 44           |
| 00496  | ARTIMETER LUMEFANTRINE            | 463      | 0              | 59               | 165              | 7.8          | 0          | 0          | 0            | 0            | 100          | 85           |
| 1131   | ARTESUNATE 200MG SUPPOSITORY      | 264      | 0              | 13               | 17               | 21           | 0          | 0          | 0            | 0            | 18           | 12           |
| 1128A  | ARTESUNATE 30MG SUPPOSITORY       | 270      | 0              | 12               | 16               | 22.2         | 0          | 0          | 0            | 0            | 18           | 18           |
| 129  | ARTESUNATE 30MG INJ               | 405      | 0              | 0                | 2                | 972          | 0          | 0          | 0            | 0            | 0            | 0            |
| 60   | ASPIRIN 300MG TAB                 | 84300    | 0              | 19325            | 22951            | 4.4          | 0          | 0          | 0            | 0            | 17300        | 21200        |
| 70   | ATENOLOL 50mg TABLET              | 13610    | 0              | 2516             | 2042             | 9            | 0          | 0          | 0            | 0            | 1090         | 100          |
| 2040   | ATENOLOL 5mg/ 10mL INJECTION      | 10       | 0              | 1                | 1                | 10.9         | 0          | 0          | 0            | 0            | 0            | 0            |
| 3060   | ATROPINE 1mg INJECTION            | 453      | 0              | 28               | 40               | 16.1         | 0          | 0          | 0            | 0            | 20           | 40           |
| 113  | AUTOCLEANING TAPE                 | 30       | 0              | 5                | 5                | 6.7          | 0          | 0          | 0            | 0            | 0            | 5            |
| 75   | AZITHROMYCIN 500MG TAB            | 2052     | 0              | 916              | 1226             | 2.2          | 0          | 0          | 0            | 0            | 810          | 1480         |
| 4551   | BACTERIAL FILTER MINI TRAP        | 0        | 0              | 24               | 34               | 0            | 0          | 0          | 0            | 0            | 0            | 20           |
| 3130   | BANDAGE Crepe 10cm                | 92       | 0              | 173              | 276              | 0.5          | 0          | 0          | 0            | 0            | 97           | 19           |
| 3129   | BANDAGE CREPE 15CM                | 85       | 0              | 36               | 29               | 2.4          | 0          | 0          | 0            | 0            | 0            | 24           |
| 3131   | BANDAGE CREPE 6CM x 4M            | 760      | 0              | 165              | 819              | 4.6          | 0          | 0          | 0            | 0            | 84           | 420          |
| 3142   | BANDAGE GAUZE 10cm                | 280      | 0              | 277              | 738              | 1            | 0          | 0          | 0            | 0            | 250          | 340          |
| 3140   | BANDAGE GAUZE 5cm                 | 3186     | 0              | 215              | 179              | 14.8         | 0          | 0          | 0            | 0            | 312          | 336          |
| 3152   | BANDAGE POP 10cm                  | 36       | 0              | 27               | 42               | 1.4          | 0          | 0          | 0            | 0            | 0            | 14           |

Page 1 of 10

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.

Item usage report

✓ Suggested ordering report

Auto generated tender

Expiring items versus cover

Days out of stock report

Item usage report with pending purchase order

Suggested order quantities with prices and price extension

Item usage [Excel] report

Suggested ordering [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 500rE | 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

The Item slow movers report shows all items that have more than a specified number of months worth of stock.

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

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.

### Base analysis on X months of usage data

- 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 turnover. 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.



Expired stock

Show expired stock

Date range

From

01/09/2024

To

30/09/2024

Previous month

Item filter...

Item code

starts with

and

Category 1

is

and batch

equals

and donor

equals

☐ Open report in Excel

Cancel

OK

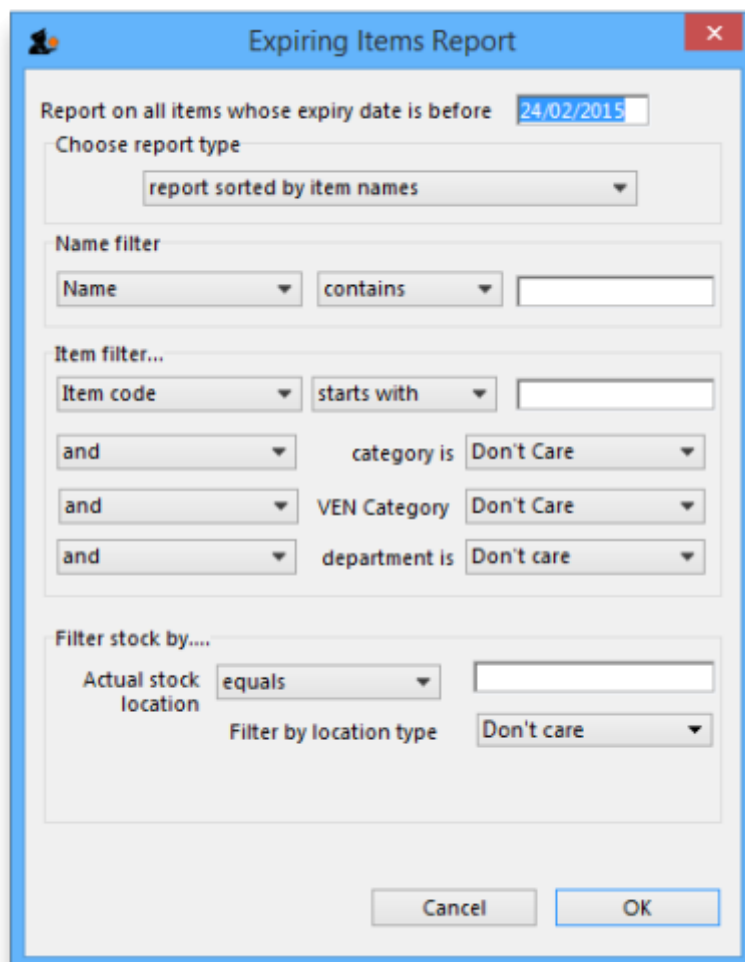
This report shows the stock that expired while it was on your shelves between the dates you see in the options. It includes current stock that expired between the dates selected and also stock on confirmed customer invoices and inventory adjustment-reduces that was expired when it was put on those transactions (so if you removed stock from the store after it had expired, that is also included as stock that expired on the shelf).

Donor and custom stock fields are included as filter options if they are turned on in the current store.

The report looks like this when exported to Excel:

|    | A   | B             | C       | D        | E               | F     | H              | I              |
|----|---|---------------|---------|----------|-----------------|-------|----------------|----------------|
| 1  | Expired stock detail from 01/01/2024 to 21/10/2024 for store(s) |               |         |          |                 |       |                |                |
| 2  | Item code   | Item name     | Batch   | Packsize | Number of packs | Donor | ItemCategory 1 | ItemCategory 2 |
| 3  | conf  | Condom Female | F6404   | 1        | 312672          |       |                | Contraceptives |
| 4  | conf  | Condom Female | F6405   | 1        | 314802          |       |                | Contraceptives |
| 5  | conf  | Condom Female | F6415   | 1        | 425962          |       |                | Contraceptives |
| 6  | conf  | Condom Female | F6416   | 1        | 402567          |       |                | Contraceptives |
| 7  | conf  | Condom Female | F6417   | 1        | 260765          |       |                | Contraceptives |
| 8  | comm  | Condom Male   | 18JN107 | 1        | 432000          |       |                | Contraceptives |
| 9  | comm  | Condom Male   | 18JN108 | 1        | 432000          |       |                | Contraceptives |
| 10 | comm  | Condom Male   | 18JN109 | 1        | 432000          |       |                | Contraceptives |
| 11 | comm  | Condom Male   | 18JN110 | 1        | 432000          |       |                | Contraceptives |

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 field with "24/02/2015" entered.
- Choose report type**: A dropdown menu showing "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, "starts with" dropdown, and an empty text input field.
  - "and" dropdown, "category is" dropdown (set to "Don't Care").
  - "and" dropdown, "VEN Category" dropdown (set to "Don't Care").
  - "and" dropdown, "department is" dropdown (set to "Don't care").
- Filter stock by....**: A section with:
  - "Actual stock location" dropdown, "equals" dropdown, and an empty text input field.
  - "Filter by location type" dropdown (set to "Don't care").

At the bottom 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

The Expiring items vs. cover report shows the number of **months of cover** for items you have in your store. The cover calculation uses the last 12 months of usage data to calculate the AMC which is used to determine months of cover.

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.

mSupply documentation wiki - <https://docs.msupply.org.nz/>

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

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

Item ledger

Report form to use :

Summary stock movement showing inventory adjustment

Date Range

From 24/02/2015 To 24/02/2015 Today

Transaction type

All transactions

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

☒ Exclude Ad hoc and non stock items

☒ Exclude hidden items

☐ Open in Excel

Cancel

OK

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.

Report form to use:

☒ Items showing each transaction - with batch details

☐ Items showing each transaction - stock summary

☐ Summary stock movement showing value

☐ Summary stock movement showing inventory adjustment

☐ Purchases by suppliers report

☐ Stock movement with stores report

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

