18.06. Mobile Dashboard set up (after v4.0)



August 2020: The instructions on this page are for configuring mSupply's legacy web dashboard and mSupply Mobile dashboards. mSupply's legacy web dashboard has been superseded by the mSupply Grafana web dashboard.



The following instruction are for setting up dashboards for mSupply versions 4.0 and later. For mSupply versions earlier than v4.0, the dashboard setup is accessed and configured via the mSupply Preferences menu, refer to Dashboard set up (prior to mSupply v4.0).

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.
- make sure your webserver is currently running.

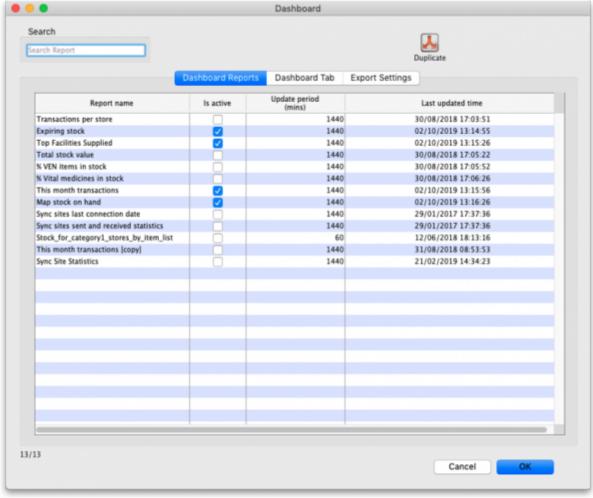
Sustainable Solutions can help with these.

Configure the dashboards

1. On the **Admin** tab of the Navigator click on the **Dashboard** button:



2. This will show you a list of the available dashboard reports:



- 3. Tick the box in the **Is active** column for each report that you want generated.
- 4. Set the number of minutes in the **Update Period (mins)** column to set how often each of

these reports is generated. 1440 is one full day.

Available dashboard reports

There are several built-in dashboard reports that everyone can use. The table below documents what they show and what properties can be edited:



If you would like help with adding one of these reports to your list, contact Sustainable Solutions on support@msupply.org.nz

Report	Method	Format	nt Parameters						
Expiring			monthsToInclude	befo repo	if this para	that the defaults			
items for Store			storeCode		ch for a sin				
Shows a list of items, for a given store, which will expire within a specified number of months. v4.01		Table,	dataElement	Looks for the dataEleme in aggregator here it tak "AMC"					
		chart	customisation	allows for a client customisation: currently supports MAM for the M specific changes.					
			ven_category	V,E,N or E,N or V,Eetc will filter the VEN items. It blank all visible items for the store are chosen			. If		
			chartType	bar, table. If blank, w default to table			II		
Report			Method		Format	Paramet s	ter		
Expiring Stock Shows a graph of total value of stock expiring grouped by the number of months in which the stock will expire.			ard_rep_expiring_s	stock	Bar chart	None			

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Report	Method		Fo	rmat		Parameters			
Items issued this month Shows a list of items, per store, which were issued in the last 30 days. Uses	dashboard_itemRow_storeCol_usag			ole		Identifies store display. Multip can be selecte separating the comma or spa "bacau,CHC" of CHC"	ole stores ed by em by ce e.g.		
store tag and master list to select items to be					master_list	Show items which are included in this master list			
displayed.					period	Number of day current date to			
Report	Method		Forma	t	P	arameters			
				cou	intry	Name of country - compulsory but not shown			
				iter	n_code	the code of the item to display			
Map stock on hand Shows a				lat_	nw_corner	the latitude of the North West corner of the map			
map of the area specified, with an "X" if the facility is out of stock of the	dashboard_map_stock_on_hand M			long	g_nw_cornei	the longitude of the r North-West corner of the map		ne	
item, or a dot representing the			lat_	se_corner	the latitude of the South- East corner of the map				
amount of stock on hand.			long	g_se_corner	the longitude of the South-East corner of the map		ie		
				stoi	re_tags	A comma sep of tags - or or parameter if y show stock fo	mit this you want i	to	
Report	Method	Method			Format	Paramet rs	te		
Monthly transact of the number of pureceipts, supplier a created this month	dashboard_rep_month_transacs			Bar or Line chart	None				

Report		Method	Format		Parame	eters
				store	e_code	code or codes of stores to show. to specify multiple stores enter multiple store_code params (append @ for a "starts with" search)
Stock_for_category1_stores_by_ Shows a table of items in rows and columns, with the stock on hand for item in that store in each cell.	stores in		Table	mast	er_list	VHP - All Items Will search for items that are part of the master list: "VHP - All Items"
				item	_code	items whose code matches this code (append @ for a "starts with" search)
				Cate	gory1_descrip	private Will search for names whose name category 1 is "private"
Report	Metho	od Fo	rmat		Parar	neters
Store Transaction Count Shows a count of each store's transactions for the past 7 and 30 days	dashb	nara ren colint store trans	ne or B art	ar	store_tags s	natches tores with his tag
Report	1	Method	For	mat	Paramete	rs
Sync sites last connection	date	dashboard_report_last_sync_da	te Tab	le	None	
Report		Method	F	orm	nat Parame	eters
Sync sites sent and receiv	ed sta	ntistics dashboard_report_sync	_stat T	able	e None	

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Report	Method		Forma	nat Parameters						
				storeTa	g	w ta %	vill sele ags ma {stor	ect st atch eTag) - report cores wher } and ote_site >	
				syncDa	yThreshold	d re	(default = 5) - col red when days sir last sync > syncDayTreshold			
				unfinali	sedSIThres	shold u ir	ed who Infinali nvoice	en nu ised s s >) - color co Imber of Supplier IThreshold	
Sync sites statistics Shows a range of statistics	dashboardSv	vncSiteStatistics	table	stocktakeDayThreshold			(default = 30) - color cell red when days since last stocktake > stocktakeDayThreshold			
related to synchronisation v4.02+	-	nicsitestatistics	table	requisit	ionDayThr	eshold	(default = 30) - color cell red when days since last requisition > requisitionDayThresho			
				lookBackPeriod			(default = 50) - Look back number of days for Supplier Invoice, Stocktake and Requisitions			
				lookBackPeriodCl			(default = 30) - Look back number of days for Customer Invoice			
				daysWit	hClThresh	nold d	(default = 0.2) - color cell red where 'days with customer invoice' divided by `number of working days` < daysWithCIThreshold			'و
Report		Method			Format		Para	met	ers	
This month's transactions Shows a bar chart of the number of purchase orders, goods receipts, supplier and customer invoices created this month.		dashboard_rep_	transacs	Bar chart	store_na	If provided the report shows details for the given store, otherwise the default store is used				
Report				Method			Forn	nat	Paramet s	:er
Top facilities supplied The 10 customers in your store to which you have sent the greatest value of stock. Shows the value of stock for each customer.			est	dashboard_rep_top_facilities Bar				chart	None	

Report				M	Method								Format		Parame rs	te
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.				d	dashboard_rep_total_stock_value						alue	h2		None		
Report			Method					Fo	rma	at		Pa	arame	ter	'S	
Transactions per store Shows a table of the transactions per stores within 30 days			dashboard_rep_month_transac			acs	Tak	able store_code		Specify a store by entering a store code, or leave blank for the default store		nk				
Report	Method			For	ma	ıt					Par	ame	eters			
Trends in	Trends in			1		eries	sto	re_i	d				the store you're d in, or no value for			-
critical dashboard_rep_in				chart		- 1		ritical_stock iten		tems	E if you want to includ s with this field checl e for all items			l,		
Report		Met	thod		Format Pa				Pa	arameters						
Unfinalised Stock transfers Shows unfinalised stock transfers within the specified time period for each facility which			hboardReportUn.	finali				able				r_th	Que tran an were num ago	rie sace c	s only with ing store s ctions th reated '> er of days	at ('
Report Method									rameters							
VEN items in stock Shows stock on hand of each items that belongs to the VEN (Vital, Essential, Necessary) category		- 1						store_code		de	ther	tore code - if empty nen default store is hosen				
		da	dashboard_rep_item_v			Line o chart			ven_category it		eto item item	E,N or E,N or V,N tc will filter the VEN ms. If blank all visible ms for the store are osen		ole		

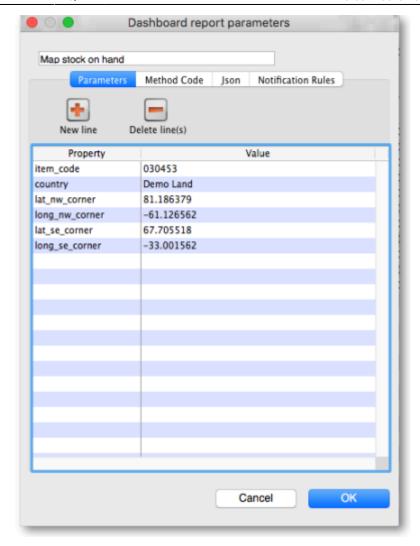
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Report	Method	Format	Parameters				
			ven_category	v or e or n if you want to include items that are Vital or Essential or Necessary			
Vital items in stock Shows a bar graph of the percentage of medicines of the chosen category in stock at each facility	t dashboard store stock percent		user_field_4	TRUE if you want to include items with this field checked			
		Bar chart		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			

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.

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.

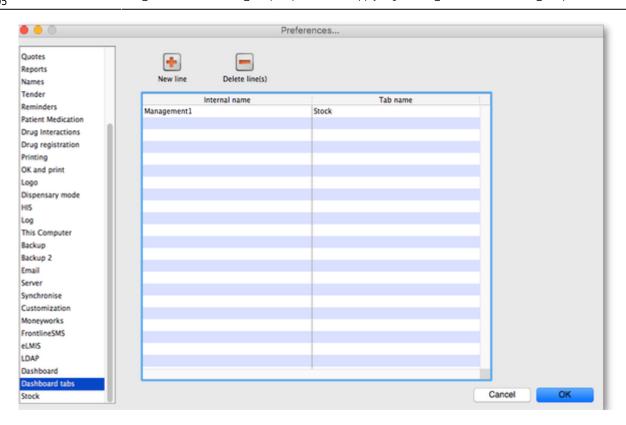


August 2020: The remaining instructions on this page are for configuring mSupply's legacy web dashboard. This may still work, but is no longer supported as it has been superseded by the mSupply Grafana web dashboard. The instructions are left here for historic reference only.

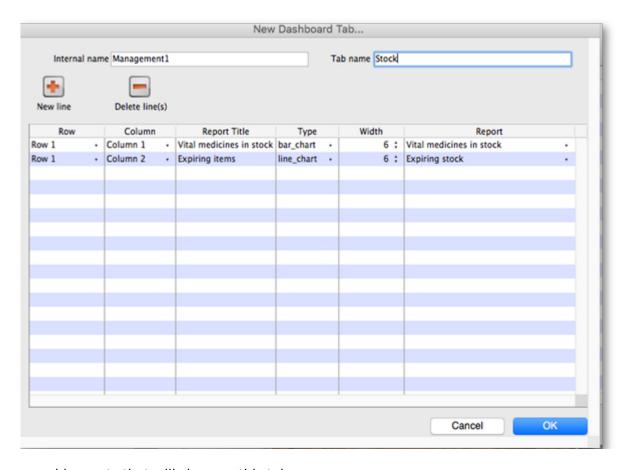
Dashboard tabs

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:

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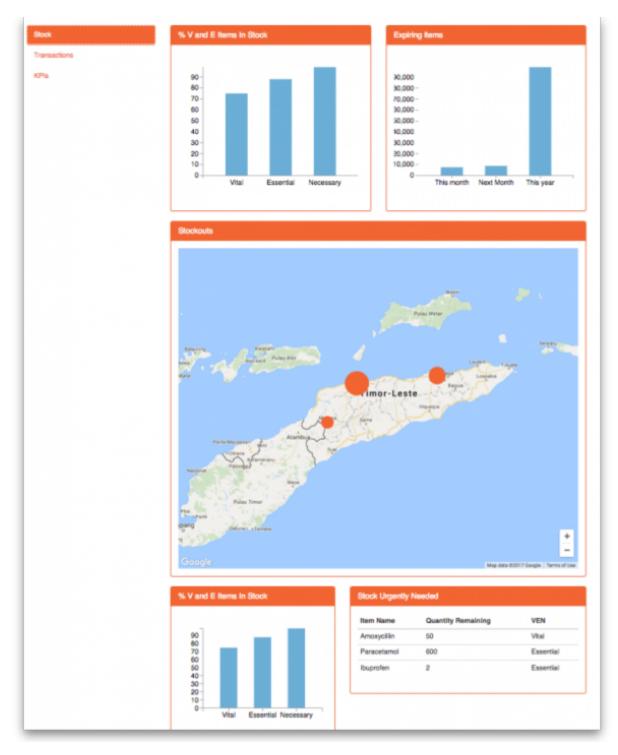
To add a tab click the **Add** button. To edit a tab, double-click it. You will be shown a window for editing a dashboard tab:



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 12 ("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 12
- 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

Adding 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
 - o table
 - ∘ pie_chart
 - o time series
 - o 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

Configure users to have access to dashboards

Once the tabs have been setup you have to choose which users will see which tabs. You do this in individual users' settings. For instructions on how to do this, see:

- Managing users > General tab > Users can: (Use the Dashboard permission)
- Managing users > Dashboard tab

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https://docs.msupply.org.nz/web_interface:dashboard_setup?rev=1597385111

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