# 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 mSupply's legacy web dashboard has been superseded by the mSupply Grafana web dashboard.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.

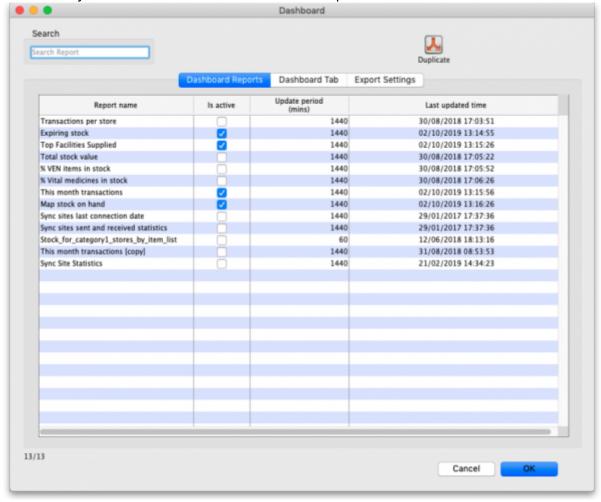
Sustainable Solutions can help with these.

## **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 <a href="mailto:support@msupply.org.nz">support@msupply.org.nz</a>

Report	Method	Format	Parameters				
Expiring	dashboardReportExpiringItemList		monthsToInclude	befo repo to 3	The number of months pefore expiry that the report includes (defaults to 3 if this parameter is missing)		
items for Store Shows			storeCode	search for a single store matching this code			;
a list of items, for a given store, which will expire within a specified number of		Table, Bar	dataElement	Looks for the dataElement in the aggregator table. If blank, will default to AMC			lf
		chart	customisation	allows for a client customisation: currently supports MAM.			1
months.			ven_category	V, E, N or E, N or V, Eeto will filter for the respectiv VEN values. If blank, no filtering by VEN value			ive
			chartType	bar, table. If blank, wi default to table			II
Report			d		Format	Paramet s	ter
<b>Expiring Stock</b> Shows a graph of total value of stock expiring grouped by the number of months in which the stock will expire.		1	ard_rep_expiring_s	stock	Bar chart	None	

Report	Method		For	mat		Parameters	Parameters			
Items issued this month Shows a list of items, per store, which were issued in the last 30 days. Uses	dashboard_itemRow_storeCol_us		<i>sag</i> Tab	ole	store_tag	Identifies stores to display. Multiple sto can be selected by separating them by comma or space e.g "bacau,CHC" or "ba CHC"				
store tag and master list to select items to be						Show items which are included in this master list  Number of days from the current date to look back.				
displayed.					period					
Report	Method		Forma	t	P	arameters				
				cou	ıntry	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_c	Мар	lon	g_nw_corner	the longitude of the North-West corner of map					
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				
				stoi	re_tags	A comma separated li of tags - or omit this parameter if you wan show stock for all stor				
Report	Metho	:hod			Format	Paramete rs				
Monthly transact of the number of pureceipts, supplier a created this month	dashboard_rep_month_transacs			Bar or Line chart	None					

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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.	items in rows and stores in e stock on hand for that dashboard_rep_stk_StoreCols			ows and stores in hand for that dashboard_rep_stk_StoreCols_Itm			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	laashnoara ren colint store transl		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				

Report	Method		Forma	mat Parameters						
			storeTa	g	v t	(default = %) - report will select stores where tags match %{storeTag} and sync id remote site > 1				
			syncDa	yThreshold	d ro	default	= 5 n da c >	) - color ce lys since		
					unfinalisedSIThreshold			(default = 0) - color cell red when number of unfinalised supplier invoices > unfinalisedSIThreshold		
Sync sites statistics Shows a range	alo alo lo a valCu	table	stocktakeDayThreshold			(default = 30) - color cell red when days since last stocktake > stocktakeDayThreshold			b	
of statistics related to synchronisation v4.02+		ncSiteStatistics/	table	requisit	equisitionDayThresholo			(default = 30) - color cell red when days since last requisition a requisitionDayThresho		
				lookBackPeriod			(default = 50) - Look back number of days Supplier Invoice, Stocktake and Requisitions			or
				lookBackPeriodCl			default = 30) - Look back number of days for Customer Invoice			
			daysWit	(default = 0.2 cell red where with custome divided by `n working days daysWithCITh			re 'days er invoice' number of s` <			
Report		Method			Format		Parai	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_month_trans		transacs	Bar chart	store_na	If provided the report shows details for the given store, otherwise the default store is used		shows for the store, vise the	
Report	Report			Method			Form	at	Paramete s	er
<b>Top facilities supplied</b> 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_facilitie			s Bar cl	hart	None	

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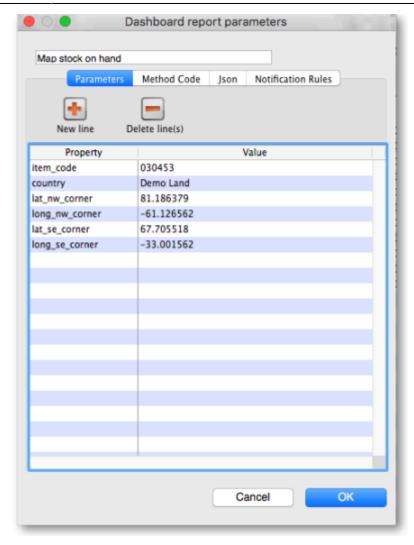
Report					Method						Format	Parame rs	te
<b>Total stock value</b> A single figure in your default currency, showing the total value of the stock you have in the store you are viewing the dashboard for.				da	dashboard_rep_total_stock_value					h2	None		
Report			Method				For	mat		Pa	aramete	ers	
Transactions per store Shows a table of the transactions per stores within 30 days		e	dashboard_rep_month_transac			acs	Tabl	Table store_code		Specify a store by entering a store code, or leave blank for the default store		nk	
Report	Method			Forn	nat				Par	ame	eters		
Trends in critical dashboard_rep_in		, Tir		st ime series				sted	the store you're d in, or no value for		r		
		_III_Stock_trends	chart	-	crit	critical_sto		TRUE if you want to inclu items with this field chec false for all items					
Report		Met	thod			Fc	orma	at		Pa	rameter	'S	
Unfinalised Stock transfers Shows unfinalised stock transfers within the specified time period for each facility which		dasl	hboardReportUnf	inalis	edStoc	k Ta	ible		ore_tag		stores matcl tags Queri transa an were	ning store	at x'
for all stores.  Report Method					Form	nat Par			ara	 ameters			
VEN items in stock Shows stock on hand of each items that belongs to the VEN (Vital, Essential, Necessary) category			dashboard_rep_item_ve		line or		store_code store cho r bar V,E et ven_category iter iter			stor ther	ore code - if empty en default store is losen		
		de							eto	,N or E,N or V,N c will filter the VEN ms. If blank all visible ms for the store are esen		ole	

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



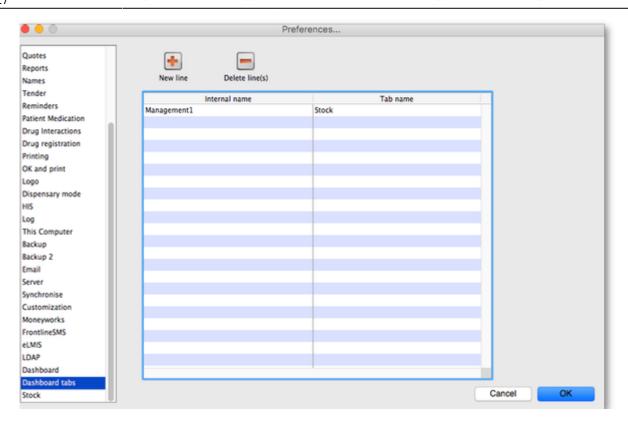
- If there are any properties shown in the list, these can be edited to change what is displayed.
- To edit a property or value, click once to select the row, and then click again in the appropriate cell to edit it.
- To add or delete a row use the New line and Delete line(s) buttons at the top of the 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.



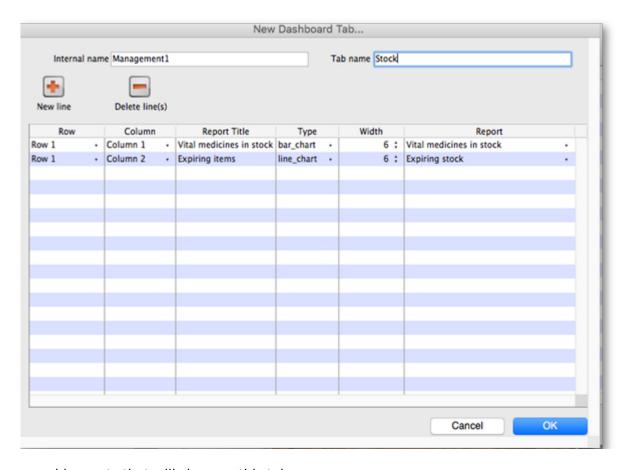
August 2020: The remaining instructions on this page are for configuring mSupply's legacy web dashboard. This may still work, but is no longer supported as it has been superseded by the mSupply Grafana web dashboard. The instructions are left here for historic reference only.

### **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:



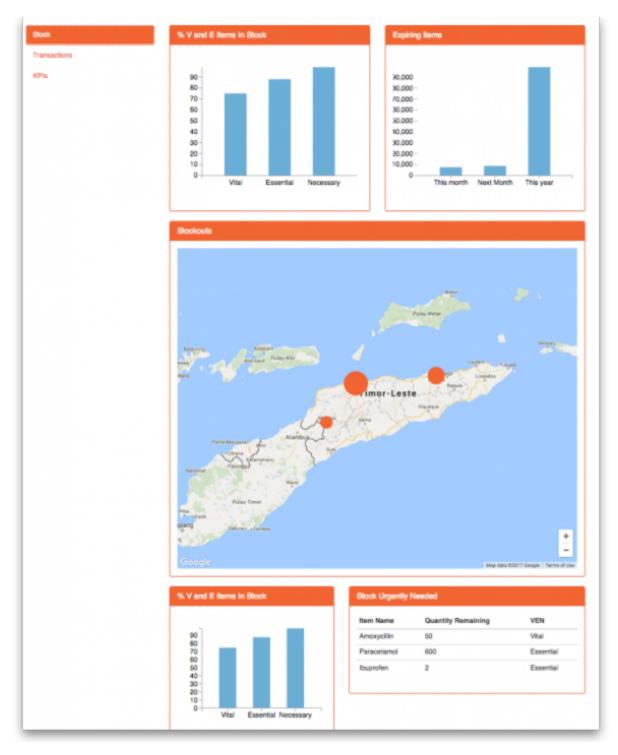
To add a tab click the Add button. To edit a tab, double-click it. You will be shown a window for editing a dashboard tab:



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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