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

August 2020:



- The instructions on this page are for configuring both
 - mSupply's legacy web dashboard. This is now superseded by the mSupply Grafana web dashboard
 - mSupply Mobile dashboards. The instruction on this page are still the only way to configure them for mSupply versions 4.0 and later



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.

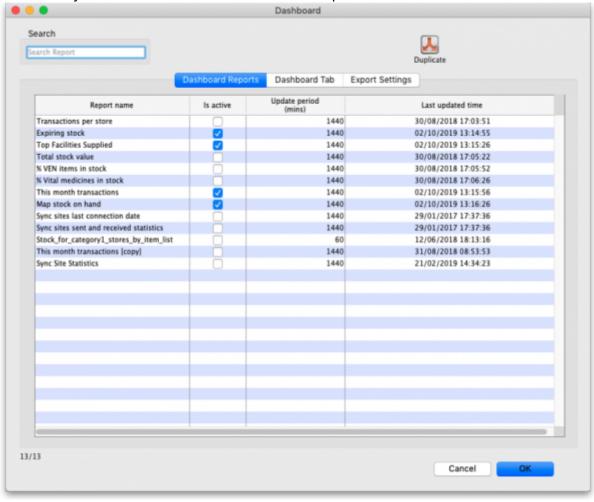
Sustainable Solutions can help with these.

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. Note that if one or more reports are selected, the scheduled process for generating and refreshing the

- dashboard reports is automatically started, there is no separate setting for turning it on and off. Similarly, if no reports are selected the dashboard report generating process will be turned off automatically.
- 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.

The Dashboard Tab tab is for setting up Dashboard tabs (see the Dashboard tabs section below) and the Export settings tab is for telling mSupply when and how to update the data behind the dashboard (see the Export settings tab section below).

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	Parameters				
Expiring			monthsToInclude	The number of months before expiry that the report includes (defaults to 3 if this parameter is missing)			
items for Store Shows	dashboardReportExpiringItemList		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 months.		Table, Bar chart	dataElement	Looks for the dataElement in the aggregator table. If blank, will default to AMC			
			customisation	allows for a client customisation: currently supports MAM.			
			ven_category	V, E, N or E, N or V, Eetc will filter for the respective VEN values. If blank, no filtering by VEN value			
			chartType	bar, table. If blank, will default to table			

Report	Method	Format	Paramete s	r
Expiring Stock Shows a graph of total value of stock expiring grouped by the number of months in which the stock will expire.	dashboard_rep_expiring_stock	Bar chart	None	

Report	Method		Fori	mat	at Parameters			
Items issued this month Shows a list of items, per store, which were issued in the last 30 days. Uses				Identifies stores to display. Multiple st can be selected by separating them b comma or space e "bacau,CHC" or			ole stores ed by em by ce e.g.	
store tag and master list to select items to be					master_list	Show items w included in thi list		
displayed.					period	Number of day current date to		
Report	Method		Format		P	arameters		
				cou	ntry	Name of country - compulsory but not shown		
				iten	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 Ma			long	g_nw_corner	the longitude North-West comap		
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 sep of tags - or or parameter if show stock for	mit this you want t		
Report	Method	Method			Format	Parameters		
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.	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	

Report	Method		Forma	nat Parameters						
				storeTa	g	v ta 9	vill select ags matcl 6{storeTa			
			syncDayThreshold			(default = 5) - color cel red when days since last sync > syncDayTreshold				
			unfinalisedSIThreshold		shold u ir	(default = 0) - color cel red when number of unfinalised supplier invoices > unfinalisedSIThreshold				
Sync sites statistics Shows a range of statistics	dashboardSv				stocktakeDayThreshold			(default = 30) - color cell red when days since last stocktake > stocktakeDayThreshold		
related to synchronisation v4.02+	-	rncSiteStatistics	table	requisitionDayThreshold		esholds	(default = 30) - color cell red when days since last requisition > requisitionDayThreshold			
			lookBackPeriod		b S S	(default = 50) - Look back number of days for Supplier Invoice, Stocktake and Requisitions				
				lookBackPeriodCl			(default = 30) - Look back number of days for Customer Invoice			
				daysWithClThreshold			(default = 0.2) - color cell red where 'days with customer invoice' divided by `number of working days` < daysWithCIThreshold			
Report		Method			Format		Parame	ters		
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		transacs	Bar chart	store_na	repo deta ame giver othe	vided the t shows Is for the n store, wise the ult store is		
Report	Report			Method			Format	Parameter s		
Top facilities supplied The 10 customers in your store to which you have sent the greated value of stock. Shows the value of stock for excustomer.			est	dashboard	d_rep_top	_facilities	s Bar cha			

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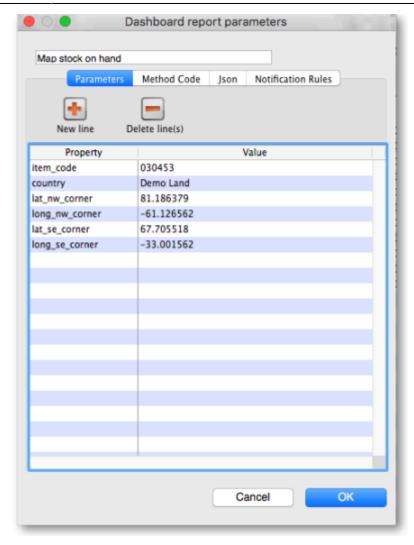
Report				М	Method						Format	Parame rs	te
Total stock value A single figure in your default currency, showing the total value of the stock you have in the store you are viewing the dashboard for.				da	dashboard_rep_total_stock_value					h2	None		
Report			Method				Form	nat		Pa	aramete	ers	
Transactions per store Shows a table of the transactions per stores within 30 days			dashboard_rep_month_transac			acs	Table	Table store_code		entering code, or	a store by a store leave bla efault sto	nk	
Report	Method			Forr	nat				Par	ame	eters		
Trends in	dachboard	ron	Tim		me series nart				sted	f the store you're ed in, or no value for s		r	
stock	critical dashboard_rep_in_stock_trend stock		_iii_stock_trends	chart			TRUE if your ritical_stock items with false for a		with			1 ,	
Report		Met	thod			Fo	ormat	rmat Parameters			'S		
Unfinalised Stock transfers Shows unfinalised stock transfers within the specified time period for each facility which							sto	tore_tags		store	es only s with ning store		
		hboardReportUni	portUnfinalisedStock			Table		days_older_th		Queries transactions tha nan were created 'x' number of days ago		κ'	
Report		М	ethod		Form	nat	at Para			ara	ameters		
VEN items in stock Shows stock on hand of each items that belongs to the VEN (Vital, Essential, Necessary) category		- 1	dashboard_rep_item_v		Line or chart				re_code the		re code - if empty n default store is osen		
		de							ategory	eto item item	,N or E,N or V,N c will filter the VEI ms. If blank all visi ms for the store ar ssen		ole

Report	Method	Format		Parameters		
		Bar chart	ven_category	v or e or n if you want to include items that are Vital or Essential or Necessary		
the chosen category in			user_field_4	TRUE if you want to include items with this field checked		
	idashnoard store stock hercenti			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)		
stock at each facility			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		
Report	Method	Format	Parameters			
			store_code	search for a single store matching this code		
			lookBack_mon	how many months of data to review when calculating; defaults to 6		
Item Stock on Hand and Months Cover Shows a table or item VEN status Stock on Hand, Monthly Consumption, and Months Cover	1		ven_category	V,E,N or E,N or V,Netc will filter the VEN items. If blank all visible items for the store are chosen. If not supplied the filter is not used; specify 'blank' to show items with empty ven. Note: each category in combination must be separated by comma, example: either v,e,n or v,e or v,n		
			item_code	Searches for items matching this code		
			customisation	Allows for a client customisation: currently supports MAM.		

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:



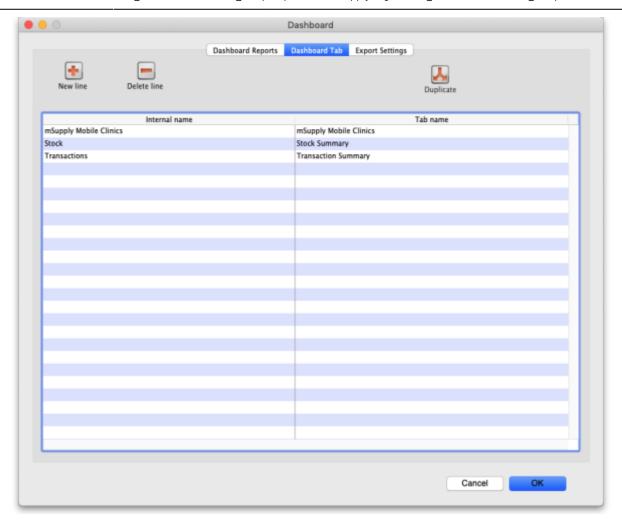
- If there are any properties shown in the list, these can be edited to change what is displayed.
- To edit a property or value, click once to select the row, and then click again in the appropriate cell to edit it.
- To add or delete a row use the New line and Delete line(s) buttons at the top of the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



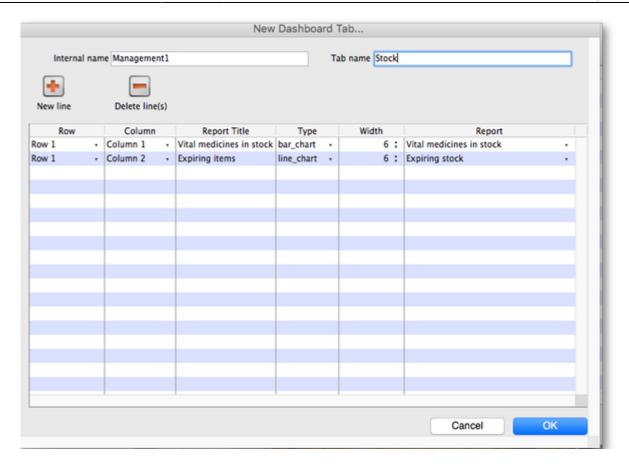
August 2020: The remaining instructions on this page are for configuring mSupply's legacy web dashboard. This may still work, but is no longer supported as it has been superseded by the mSupply Grafana web dashboard. The instructions are left here for historic reference only.

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 click on the *Dashboard Tabs* tab of the File > Preferences > Dashboard window shown above:



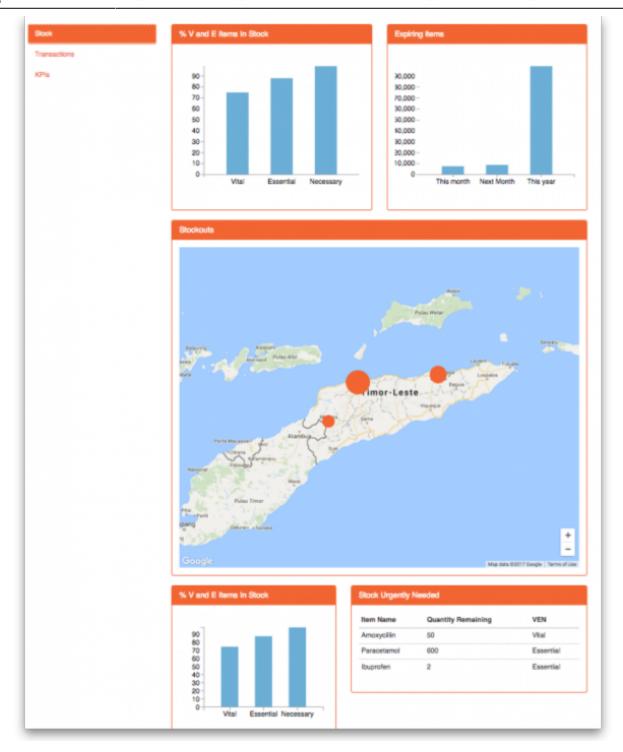
To add a tab click the **Add** button. To edit a tab, double-click it. You will be shown a window for editing a dashboard tab:



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:
 - \circ 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
 - ∘ table
 - o pie chart
 - time_series
 - ∘ 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

Exporting mSupply data to the dashboard

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