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 This is now superseded by the mSupply Grafana web dashboard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.

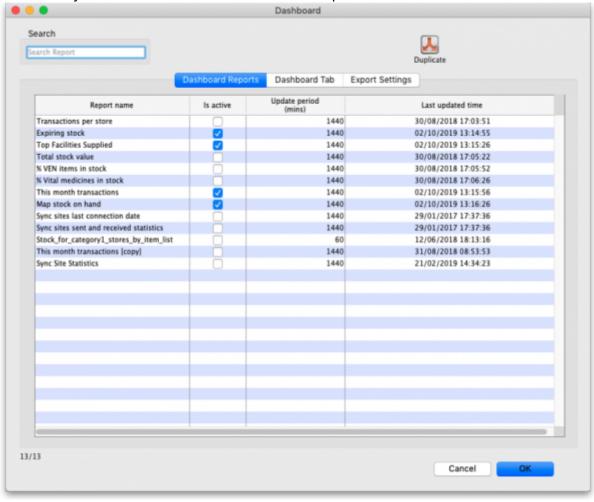
Sustainable Solutions can help with these.

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 Exporting msupply data to the dashboard 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		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_sto	w_storeCol_usa		le	store_tag	Identifies store display. Multip can be selecte separating the comma or spa "bacau,CHC" (CHC"	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 cour compulsory b 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_o	n_hand	Мар	long	g_nw_corner	the longitude of the North-West corner of the map		he		
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_se_corner		the longitude of the South-East corner of the map				
				stoı	re_tags	A comma separated I of tags - or omit this parameter if you wan show stock for all sto		to		
Report	Method				Format	Parametrs	te			
Monthly transact of the number of pureceipts, supplier a created this month.	dashboard_rep_month_transacs chart			Bar or Line chart	None					

Report		Method	Format		Param	eters	<u> </u>
				store_cc	ode		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 stolumns, with the stock on hand for item in that store in each cell.	stores in	dashboard_rep_stk_StoreCols_Itm	Table	master_	list	:	VHP - All Items Will search for Items that are part of the master ist: "VHP - All Items"
				item_co	de	1	tems whose code matches this code (append @ for a "starts with" search)
				Categor	y1_descriį	ption	private Will search for names whose name category 1 s "private"
Report	Method	d F	ormat		Parai	mete	ers
Store Transaction Count	1				r	matc	hes
Shows a count of each store's transactions for the past 7 and 30 days	dashbo	ara ran calint stara trans	ne or B nart	ar	re_tags s		s with
store's transactions for the		ara ran calint stara trans	hart	Stol		store his t	s with
store's transactions for the past 7 and 30 days	M	ethod	nart For	mat Pa	t	store his t	s with
store's transactions for the past 7 and 30 days Report	M	ethod	For ate Tab	mat Pa	aramete	store this t	s with ag

Report	Method		Forma	nat Parameters							
				storeTa	g	v t 9	vill selec ags mato {{storeT	= %) - report t stores where ch [ag} and emote_site > 1			
				syncDa	yThresholo	d r					
				unfinali	sedSIThres	r shold u	ed when Infinalise nvoices :	= 0) - color cell number of ed supplier > edSIThreshold			
Sync sites statistics Shows a range of statistics	dashboardSv	vncSiteStatistics	table	stocktal	keDayThre	shold s	ell red wince last	= 30) - color when days c stocktake > eDayThreshold			
related to synchronisation v4.02+	_	ncsitestatistics	table	requisit	equisitionDayThreshold			(default = 30) - color cell red when days since last requisition > requisitionDayThreshold			
				lookBackPeriodCl daysWithClThreshold			(default = 50) - Look back number of days for Supplier Invoice, Stocktake and Requisitions				
							(default = 30) - Look back number of days for Customer Invoice				
							(default = 0.2) - color cell red where 'days with customer invoice' divided by `number of working days` < daysWithCIThreshold				
Report		Method			Format		Param	eters			
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	<i>transacs</i> Bar chart store			rovided the ort shows ails for the en store, erwise the ault store is			
Report			r	Method			Forma	Parameter			
Top facilities s your store to wh value of stock. S customer.	nich you have	e sent the greate	est	dashboard	d_rep_top	_facilitie	s Bar ch				

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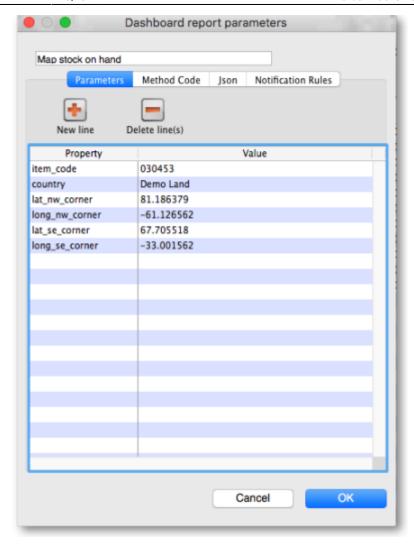
Report				M	Method								Forma	t	Parame rs	te
Total stock value A single figure in your default currency, showing the total value of the stock you have in the store you are viewing the dashboard for.					dashboard_rep_total_stock_value					h2		None				
Report			Method					Fo	rma	at		Pa	arame	ter	'S	
Transaction Shows a tabl transactions within 30 day	e of the per stores	'e	dashboard_rep_	<u>mon</u>	onth_transacs			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	dashhoard	ren	in stock trends	1		eries	sto	re_i	d	ļi		sted	the store you're d in, or no value for			-
stock	stock				crit	TRUE if y critical_stock items wit false for a			with				l,			
Report		Met	thod				Fo	orm	ıat			Pa	ramete	ers	3	
transfers Sh unfinalised si transfers with specified time for each facile matches the "store_tags" parameter. If tags are pass transactions for all stores.	ralised Stock sfers Shows alised stock fers within the fied time period ach facility which hes the e_tags" meter. If no store are passed in, actions are shown			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		M	ethod						meter							
Shows stock on hand of each items that belongs to the VEN (Vital, dashboard_rep_item_ven chart		- 1							store_code t		ther	tore code - if empty nen default store is hosen				
		et ven_category iten iten		eto item item	,N or E, N or V, N c will filter the VEN ms. If blank all visible ms for the store are sen		ole									

Report	Method	Format		Parameters			
			ven_category	or e or n if you want to clude items that are Vital or ssential or Necessary			
the chosen category in		Bar chart	user_field_4	TRUE if you want to include items with this field checked			
	dashboard_store_stock_percent			RUE if you want to include ems with this field checked lote that the labels for fields and 7 may be different, as ney are set up in the asymptotic preferences (misc ab)			
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 of item VEN status Stock on Hand, Monthly Consumption, and Months Cover	1	Table	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:



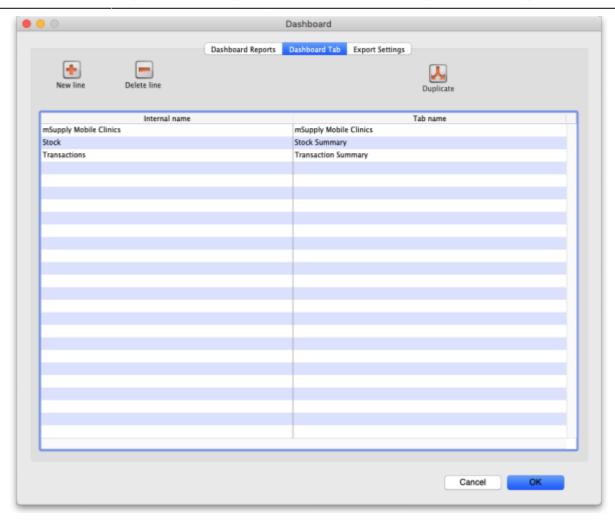
- If there are any properties shown in the list, these can be edited to change what is displayed.
- To edit a property or value, click once to select the row, and then click again in the appropriate cell to edit it.
- To add or delete a row use the New line and Delete line(s) buttons at the top of the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



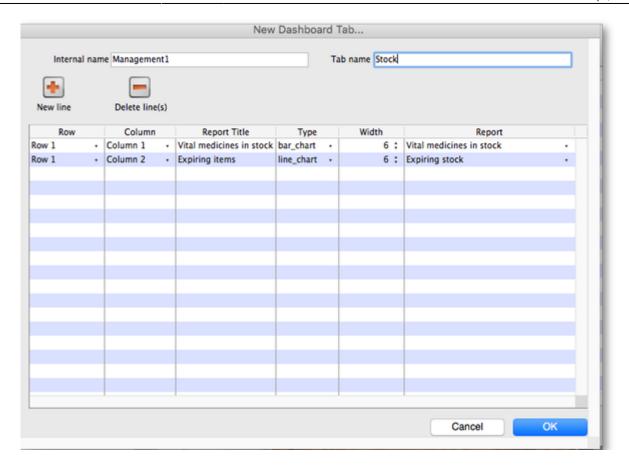
August 2020: The remaining instructions on this page are for configuring mSupply's legacy web dashboard. This may still work, but is no longer supported as it has been superseded by the mSupply Grafana web dashboard. The instructions are left here for historic reference only.

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 window which is displayed when you click on the *Dashboard* icon on the *Admin* tab of the Navigator:



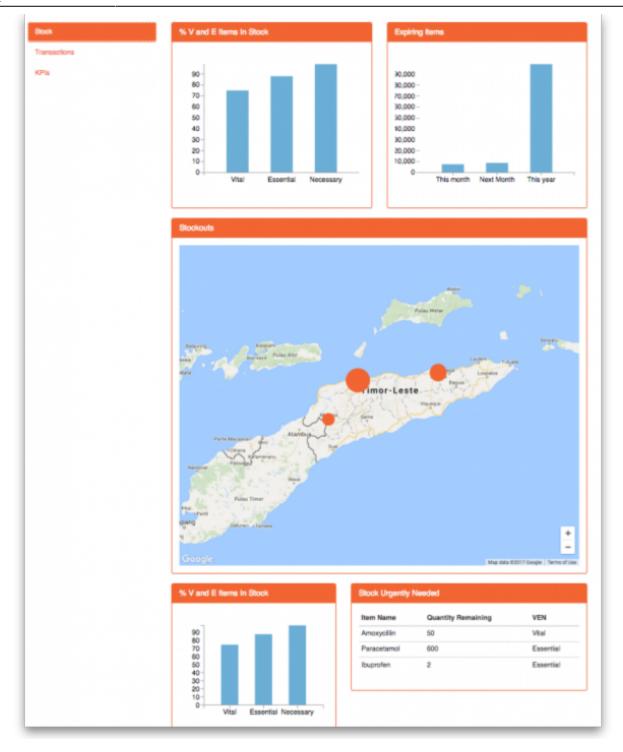
To add a tab click the **Add** button. To edit a tab, double-click it. You will be shown a window for editing a dashboard tab:



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
 - 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

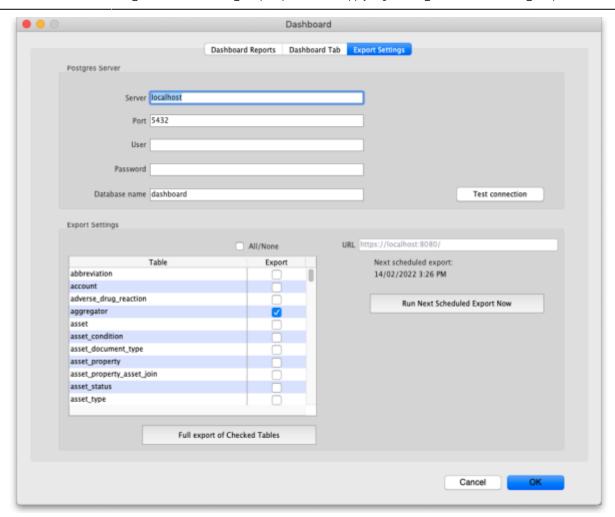
Configure users to have access to dashboards

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

The mSupply Grafana dashboard has its own separate Postgres database to improve performance and prevent use of the dashboard slowing mSupply down. This means that the data for the dashboard must be exported from the mSupply database to the dashboard's database. You control the settings for this process by clicking on the *Export settings* tab of the window which is displayed when you click on the *Dashboard* icon on the *Admin* tab of the Navigator:



Postgres server section

Enter the details of the dashboard's Postgres server in here:

- Server: the URL of the server the database resides on
- Port: the port the database is being served on
- **User**: the username mSupply will use to login to the dashboard's database
- Password: the password ms will use ot login to the dashboard's database
- Database name: the name the dashboard's database has been given in Postgres

Test connection button: when you have enetered all the details in this section, click on this button to test the connection to the dashboard's database. mSupply will tell you whether the connection is successful or not.

Export settings section

In the table select the tables in the mSupply database that you want to export to the dashboard. Care needs to be taken here; you need to choose all the tables that will provide the information you need in the dashboard but not those you do not need as this may impact on the speed of the export, and therefore how quickly your dashboard can be updated.

Use the **All/None** checkbox to quickly check or uncheck all the tables in the list.

The **URL** field shows you the URL that mSupply is exporting the data to.

Full export of Checked Tables button: Clicking this will force mSupply to empty the dashboard database and export all the data from the selected tables to the dashboard database.

Run Next Scheduled Export Now button: Clicking this will make mSupply immediately export to the dashboard database all the data that has changed in its database since the last export to the dashboard.

When these settings have been saved, mSupply will use them to automatically export the selected data to the dashboard according to the schedule that has been set.

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