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 This is now superseded by the mSupply Grafana web dashboard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.

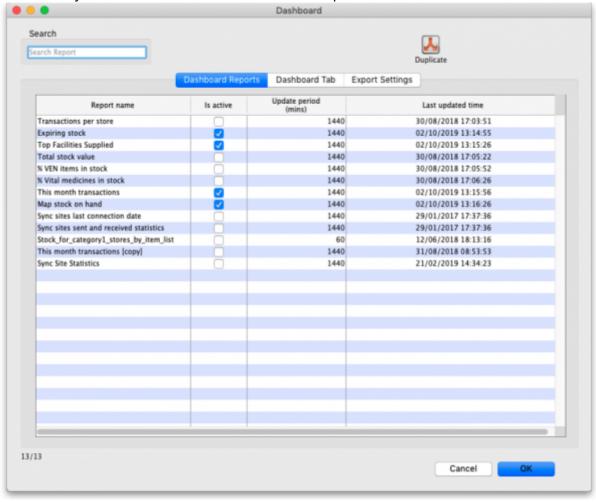
Sustainable Solutions can help with these.

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. v4.01		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	Parameto s	er
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	

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Report	Method		For	nat		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			store_tag so store_tag so co "! d_itemRow_storeCol_usag Table					
store tag and master list to select items to be						Show items which are included in this master list			
displayed.					period	Number of day current date to			
Report	Method	F	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_cornei	the longitude of the North-West corner of the map		ıe	
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		e	
				store_tags		A comma sep of tags - or or parameter if y show stock fo	nit this you want t	to	
Report	Method	lethod			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 %	ill sel ags m {stor	ect st atch eTag) - report fores wher } and lote site >	
				syncDay	yThreshold	d la	defaul	= lt = 5 len da nc >) - color co lys since	
			unfinalis	sedSIThres	shold u ir	(default = 0) - color cel red when number of unfinalised supplier invoices > unfinalisedSIThreshold				
Sync sites statistics Shows a range of statistics	dashboardSy	table	stocktakeDayThreshold requisitionDayThreshold			(default = 30) - color cell red when days since last stocktake > stocktakeDayThreshold				
related to synchronisation v4.02+	-	lable				(default = 30) - color cell red when days since last requisition > requisitionDayThresholo				
			lookBackPeriod			(default = 50) - Look back number of days fo Supplier Invoice, Stocktake and Requisitions			for	
			lookBackPeriodCl			(default = 30) - Look back number of days fo Customer Invoice				
				daysWithClThreshold			(default = 0.2) - color cell red where 'days with customer invoice' divided by `number of working days` < daysWithCIThreshold)و
Report		Method			Format		Para	amet	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_i		_month_	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			Format Par		Paramet s	ter
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_facilit			Bar o	chart	None	

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Report				N	Method								Forma	t	Paramet 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.				C	dashboard_rep_total_stock_value						alue	h2		None		
Report			Method					Fo	orm	at		P	aramet	er	'S	
Transaction Shows a tabl transactions within 30 day	e of the per stores	e ·	dashboard_rep_month_transacs			acs	Та	able store_code		Specify a store by entering a store code, or leave blank for the default store		nk				
Report	Method			For	ma	at					Par	ame	eters			
Trends in	dachboard	ron	in stack trands	Tim	ne s	eries	sto	re_	_id				the store you're d in, or no value for			
stock	critical dashboard_rep_in_stock_tro stock			cha cha		- 1		critical_stock item		items	if you want to inclus with this field chec for all items			l,		
Report		Met	thod				F	orr	nat			Pa	Parameters			
Unfinalised Stock transfers Shows unfinalised stock transfers within the specified time period for each facility which		dasl	hboardReportUnfinalisedStoc			k Ta				er_th	Queries only stores with matching store tags Queries transactions that were created 'x' number of days ago		at ('			
Report		M	ethod			Form	at				F		meters			
VEN items in stock Shows stock on hand of each items that belongs to the VEN (Vital, Essential, Necessary) category									store_		e_code the		re code - if empty n default store is sen			
		da	dashboard_rep_item_			ven Line c				tegory	eto iten iten	E,N or E, N or V tc will filter the ms. If blank all ms for the stor osen		the VEN all visib	ole	

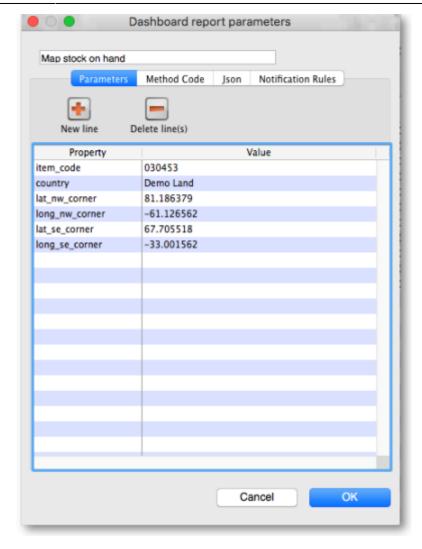
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Report	Method	Format	Parameters						
			ven_category	v or e or n if you want to include items that are Vital or Essential or Necessary					
Vital items in stock Shows a bar graph of the percentage of medicines of the chosen category in stock at each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



Parameters tab

- 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.

Method code tab

This tab is password protected. After entering the password you are shown the code used to execute the report, which you can edit as necessary.

Json tab

This tab shows the JSON formatted text that was returned from the last successful execution of the report.

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Notification Rules tab

On this tab you can enter JSON formatted text to define the rules for notifying users with the results of the report. To Add, edit or delete any rules you must first click on the **Click to unlock** button and enter the password to allow editing.

An example of a valid rule is:

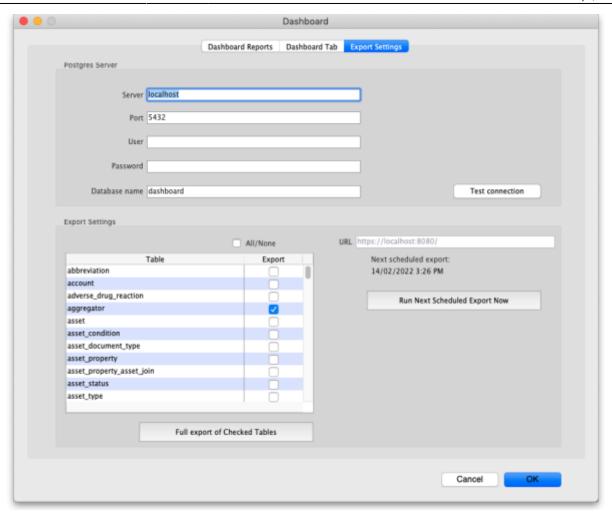
```
 \label{lem:continuous} $$ {\tt "Rules":[{\tt "Monthly\_report\_emails"],"notificationPeriod":1,"last SentAt":"2022-02-07T08:28:42Z"}]}
```

The elements are as follows:

- userTags defines the tags the users must have to be sent the report. Add as many as you wish
- notificationPeriod the period in whole days between sendings of the report.
- lastSentAt the date and time the report was last sent, in the format YYYY-MM-DDTHH:MM:SSZ. If set to "" (blank) this will trigger the sending of the report when the time in notificationPeriod has elapsed, measured from the time the **OK** button is clicked on this window.

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.

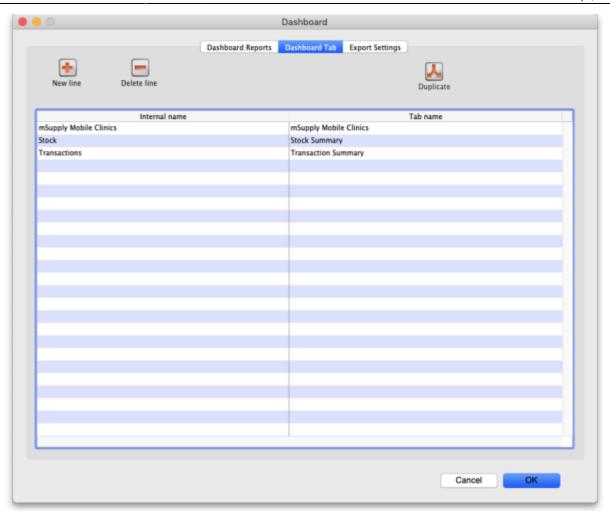
When these settings have been saved, mSupply will use them to automatically export the selected data to the dashboard according to the schedule that has been set.



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.

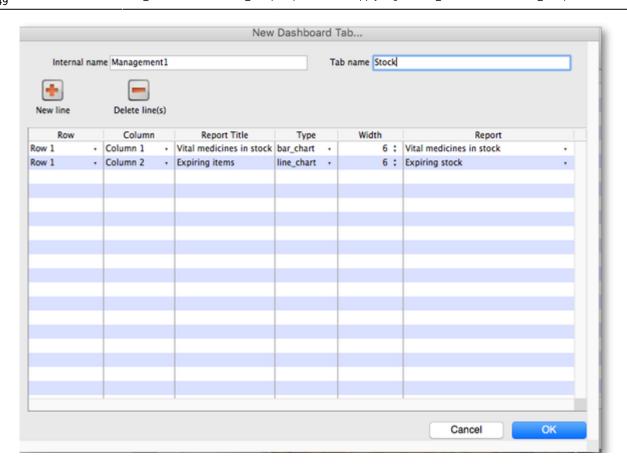
Dashboard tabs

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:

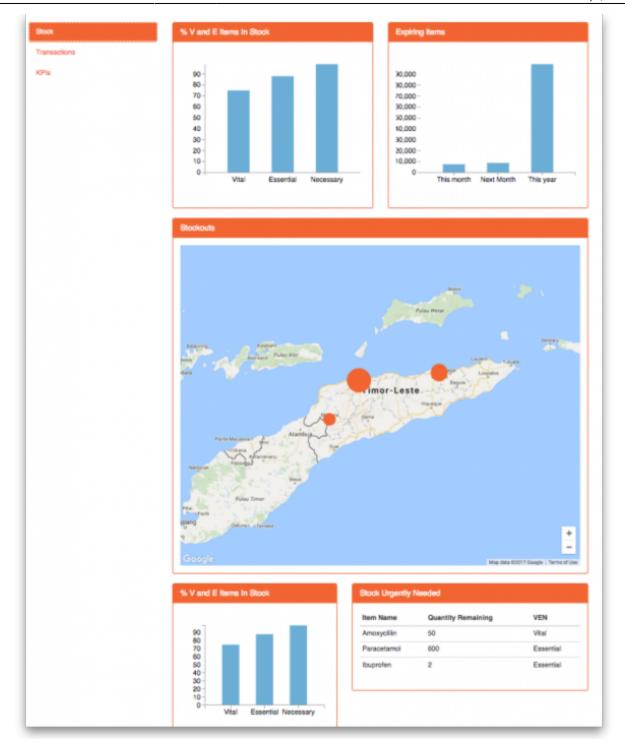
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Now you add reports that will show on this tab.

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
 - o bar chart
 - ∘ 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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