14.05. Dashboard set up (prior to v4.0)

The following instructions are for setting up dashboards for mSupply versions prior to v4.0.

For mSupply v4.0 and later please refer to the Remote User Web Interface chapter of this user guide.

Before the settings in this section will work you must make sure your webserver is currently running.

If a webserver is not yet set up for your organisation a request can be put through to mSupply Support.

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 (Sustainable Solutions can help with this if needed)

• •	7 _	Preferences		
uotes	We use the web dashboard			
eports	Dashboard web URL http://127.0.0.1:80	80/		<u></u>
umes	Darkhand mant onting			Duplicate
ender	Dashboard report settings			
minders	Report name	Is active	Update period (mins)	Last updated time
ient Medication	Vital medicines in stock		120	11/09/2016 16:30:47
g Interactions	Transactions per store		120	12/09/2016 08:05:48
g registration	Top Facilities Supplied		120	12/09/2016 08:05:50
ting	Expiring stock		120	12/09/2016 08:05:51
and print	This month transactions		120	12/09/2016 08:05:51
0	Total stock value		120	12/09/2016 08:05:52
ensary mode	VEN items in stock		120	12/09/2016 08:05:53
	Vital_items_urgently_needed		120	12/09/2016 06:04:19
	Sync sites sent and received statistics		120	12/09/2016 08:16:57
Computer	Sync sites last connection date		120	12/09/2016 08:16:57
up	Stock_Timor_Vita	Image: A start and a start	120	11/09/2016 16:30:52
ID 2	Stock_Plumpy_Sup		120	11/09/2016 16:30:52
ail				
er .				
hronise				
tomization				
eyworks				
tlineSMS				
s				
p				
hboard				
shboard tabs				
shboard tabs				Cancel

To setup the dashboard:

- 1. Check the "We use the web dashboard" checkbox.
- 2. In the **Dashboard web URL** field enter the base URL to reach the dashboard on e.g.

http://dashboard.msupply.org:2048/ (i.e. everything up to 'dashboard' in the URL you browse to - don't forget the trailing slash (/) otherwise it won't work!)

- 1. if you are running from localhost, use your IP rather than http://localhost both here and in the browser
- 2. the URL users type in to the address bar of their browser to access the dashboard will be this URL with Dashboard on the end
- 3. Tick the reports in the **Is active** column to select them for display on your dashboard.
- 4. You can choose how often these reports are updated by clicking in the **Update Period (mins)** column and entering a number of minutes.
- 5. Setup which reports appear on which tabs refer Dashboard tabs.
- 6. Setup which dashboard reports each user can access refer The dashboard.

Editing dashboard reports

Double-click a report in the list shown above and the following window will open:

0	Dashboard report parameters
Stock_Timor_Vita	1
	Parameters Method Code Json
New line	Delete line(s)
Property	Value
lat_nw_corner	-8.0279
lat_se_corner	-8.7215
long_nw_corner	125.3258
long_se_corner	125.838210
item_code	MIXCSBVIT
country	Timor Leste
	Cancel OK

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.

See the section below for details of the various dashboard reports available and the settings that can be edited.

What the dashboards show and what can be edited

There are several built-in dashboard reports that everyone can use. Here's what they show and what properties can be edited to change what they show:

Report name	Property	Value
1		each items that belongs to the VEN (Vital, Essential, <i>item_ven</i>) Report format : Table
	store_code	store code if empty then default store is chosen
	ven_category	V,E,N or E,N or Vetc will filter the VEN items. If blank all visible items for the store are chosen
		ault currency, showing the total value of the stock you rd for. (<i>Method: dashboard_rep_total_stock_value</i>)
	None	None
		rt of the number of purchase orders, goods receipts, onth. (<i>Method: dashboard_rep_month_transacs</i>)
	None	None
		onthly number of all items expiring within the year, : dashboard_rep_expiring_stock)
		None
	t 90 days. Shows the value c	your store to which you have sent the greatest value of stock for each customer. (<i>Method:</i>
	None	None
-	r store : Shows a table of all rd_rep_month_transacs)	transactions per store within the past 7 and 30 days
	store_tags	A comma-separated list of tags - or omit this parameter if you want to show stock for all stores.
1	ock : Shows a bar graph of th ity. (<i>Method: dashboard_stor</i>	e percentage of medicines of the chosen category in e_stock_percent)
	ven_category	v or e or n if you want to include items that are Vital or Essential or Necessary
	user_field_4	TRUE if you want to include items with this field checked

Report name	Property	Value
		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

Map stock on hand: Shows a map of the area specified, with an "X" if the facility is out of stock of the item, or a dot representing the amount of stock on hand. (*Method: dashboard map stock on hand*)

 — — ·	
lat_nw_corner	the latitude of the North-West corner of the map
long_nw_corner	the longitude of the North-East corner of the map
lat_se_corner	the latitude of the South-East corner of the map
long_se_corner	the longitude of the North-East corner of the map
item_code	the item code of the item to display
country	compulsory parameter
store_tags	A comma-separated list of tags - or omit this parameter if you want to show stock for all stores

Sync sites last connection date: Shows the last connection date and current mSupply version of each sync site. (*Method: dashboard_report_last_sync_date*)

None	None

Sync sites sent and received statistics: Shows number of records sent and received by each syc site within the last day. (*Method: dashboard_report_sync_stat*)

None None

Stock_for_category_1_stores_by_item_list: Shows... (Method: -)

None None

Trends in critical stock: Shows the historical stock on hand using parameters to filter store and/or items. Will show the current percentage, and percentages from the last day of each month for the prior six months. (*Method: dashboard_rep_in_stock_trends*)

s	store_id	the ID of the store you're interested in, or no value for all stores
critica	l_stock	TRUE if you want to include items with this field checked, false for all items
Output: use the type	"time_s	series_chart"

Reports Monthly Transactions Shows how many transactions of each type the chose store has processed this month (*Method: dashboard_rep_month_transacs*)

store_name the name of the store which you are interested in, or no value if you want all stores

Items Issued This Month: Shows items issued by the facility within the last 30 days. (*Method: dashboard_itemRow_storeCol_usage*)

	store_tag include stores with this tag
	master_list include items on this master list
	period 30 (currently only 30 days is supported)
Stock each item	n each store . Shows a table of items in rows and stores in columns, with the

Stock each item in each store: Shows a table of items in rows and stores in columns, with the stock on hand for that item in that store in each cell. (*Method: dashboard_rep_stk_StoreCols_ltm*)

Report name	Property	Value
		store code attached to the store. multiple stores can be specified by adding more parameters that begin with store_code (e.g. store_code2). The item_code parameter must be specified if using store_code
	item_code	items whose code matches this code (append "@" for a "starts with" search)
	master_list	selected master list of items. Category1_description must be specified if using a master_list
	Category1_description	Items with this category1
	k Transfers : Table of unfina hod: dashboardReportUnfina	lised stock transfers (between mSupply stores) for lisedStock)
	store_tags	(optional) A comma-separated list of tags - or omit this parameter if you want to show transfers for all stores.
	days_older_than	(optional) show only transactions that are older than this value (days).

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.

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:

	Pr	eferences	
Quotes Reports Names	New line Delete line(s)		
Tender	Internal name	Tab name	
Reminders	Management1	Stock	
Patient Medication			
Drug Interactions			
Drug registration			
Printing			
OK and print			
Logo			
Dispensary mode			
HIS			
.og			
This Computer			
lackup			
Backup 2			
mail			
ierver			
ynchronise			
Customization			
Moneyworks			
rontlineSMS			
LMIS			
LDAP			
Dashboard			
Dashboard tabs			
Stock			Cancel OK

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:

		New	Dashboar				
Internal n	name Management1	L		Tab name	Stock		
New line	Delete line(s)						
Row	Column	Report Title	Type	Wie	jth	Report	
Row 1	Column 1	Vital medicines in stock		•	6:		•
Row 1		Expiring items	line_chart		6:	Expiring stock	
				_			
				_			
							_
						Cancel	OK

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 6 ("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 6
- For the map
 - $\circ\,$ 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:
 - $\circ\,$ Row 3, Col 1, width 5
 - $\circ\,$ Row 3, Col 1, width 7

To add 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

Add a dashboard tab to a user's dashboard

This is the final step in setting up dashboards: once the tabs have been setup you have to choose which users will see which tabs. You do this in individual users' settings. See managing users for instructions on how to do this.

Previous: 14.04. Printing preferences | | Next: 14.06. Entering a new logo

From: https://docs.msupply.org.nz/ - **mSupply documentation wiki**

Permanent link: https://docs.msupply.org.nz/preferences:dashboard?rev=1584355412



Last update: 2020/03/16 10:43