# **13.01. Report basics**

Choose *Report* from the menus and this menu appears:

itient	Report	Special Help		
	Cu	stom report	- 1	
	AT	C category analysis		
	Tra	insactions		
	AB	C analysis		
	Ma	nagement summary		
	Qu	otation summary		
	Pu	rchasing	,	
	lte	ms and Stock	· · ·	
	De	btors and Creditors	I	
	Tra	nsport report		
	Pre	scriber report		
	Us	er transaction totals		
	Ba	ckorder report		
	Su	ggest price list additions	5	
	Up	date price list		
	Pri	ce list		
	Lo	cation report		
	Ma	nage reports		

13.01. Report basics

For some reports, the default setting includes *all items*, and as most stores will have several hundred items - maybe over 1,000 - reports on all items will, if printed, use a great deal of paper. If you must have a printout of your report, please exercise caution when selecting the criteria, and so avoid wasting paper.

Reports on purchasing are displayed when *Purchasing* is selected:



Reports on items and stock are displayed when *Items and Stock* is selected:

Opening stock
Current stock
Stock on date
Show total stock value
Graph: Stock by item
Graph: total stock
Item list
Items out of stock
Days out of stock
Item usage
Item slow movers
Expiring items
Expiry item vs cover
Item ledger

Reports on debtors and creditors are displayed when *Debtors and Creditors* is selected.

Debtors	
Creditors	
Aged debtors	
Customer statements	

Many reports are available from the Reports page of the Navigator, as shown below:

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2			mSupply	y navigator			8
		Ŷ			oño		?
0	ustomer	Suppliers	Item	Reports	Special	Admin	
	Show total stock value Current stock Opening stock Stock on date Graph: total stock Graph: stock by item Item List Item usage Item slow movers Location report		ABC analysis Management summary User transaction totals Backorder report Custom report Manage reports priring Expiring items Expiry item Vs cover	Transactions Transactions Transactions Purchase orders Purchases Debit/credit Debtors Aged debtors Customer statem Creditors Creditors	nents	Quotation summary         Transport report         Suggest price list addtns         Update price list         Price list         Category Analysis         Item ledger         Users report         Suggest order quantities	
	Data File: mSupply_data_ne Seneral	w.4DD	mSu	pply			

Many of the reports present you with a window like this before printing the report:

	ABC analysis for date: 15	5/02/09 - 15/02/12 , Store none 💌
Footer		
		page 💌
Destination		
Printer	Preview on screen before printing	[default -
Open in Excel		uerauit
Save as HTML file		
Save as Text file		

This window allows you to set various options:

## **Report destinations**

**Printer:** Select this option to display.the print window. The preview of the report can be displayed by turning on the print preview.

**Open in Excel:** *If the Open in Excel* box is checked, mSupply will immediately open the report as a spreadsheet in the spreadsheet application (MS Excel, OpenOffice/LibreOffice Calc etc.) you have

installed on your computer.

- When this box is checked, you will first be asked to save the report. Once you have given it a name, the report will be saved, and then automatically opened in spreadsheet form.
- mSupply automatically detects any spreadsheet application you have installed on your computer (i.e. any application that is associated with .xls or .xlsx files). You do not have to set the location of this application.

**Save to HTML file:** If this option is selected, your report will be saved with extension ".html". Hence, it can be opened by any web-browser or spreadsheet application on any platform or operating system.

**Save as Text file:** Your report will be saved to a file as a tab-delimited text file. (That is, a tab character between each column and a return character at the end of each row). After saving, you can open the file in a spreadsheet or word processing program.

### Header and footer

You can choose what information will be displayed at the top and bottom of each page. The default report heading appears in the right hand *Heading* field and is automatically set according to the report you are printing: you can edit this as required and what is entered in this field is what will be printed as the report title. By default, the date will print on the left and the page number on the top right of each page.

If you have filled in a default header and footer in the Preferences, these will be displayed at the top left (for the header) and the bottom centre (for the footer)

#### Preview on screen before printing

This option turns on print preview. Note that you can also turn on print preview from the print window that is displayed after you click the OK button.

# **Output to Excel**

Most reports can be output to an Excel file. This is particularly helpful if you are wanting to analyse a large amount of data.

As at July 2021, there are three methods of producing Excel reports from mSupply:

- **Quick reports** Easiest to create, fastest to run, but least flexible in terms of formatting. mSupply users can create these - refer Custom reports
- SRP reports More powerful than Quick reports
- **XL Plugin reports** Most powerful in terms of formatting, but slowest in terms of operation.



Sometimes new, more powerful versions of existing reports have been created using the XL Plugin specifically for the purpose of analysis using pivot tables and filters. We have



not wanted to delete the older reports, so we have kept them, and named the new report with **[Excel]** in the title.

Reports produced for Excel will sometimes not have the data formatted correctly, particularly, dates - refer to this.

# Supervisor mode (reporting over mutiple stores)

If you wish to report over mutiple stores at once, you can be given permission to use Supervisor mode. When you are in this mode, report filter windows will have an additional store list added ot the window so that you can choose which stores' records are to be included in the report.

See the 25.01. Miscellaneous topics: Supervisor mode - all stores page for details.

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