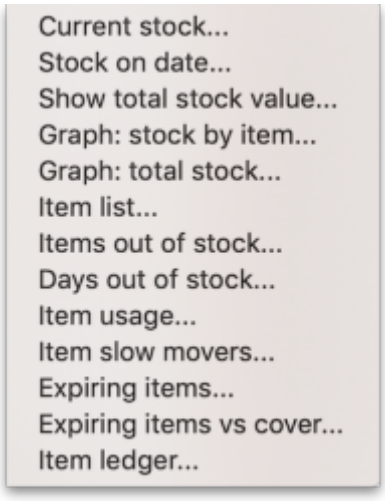
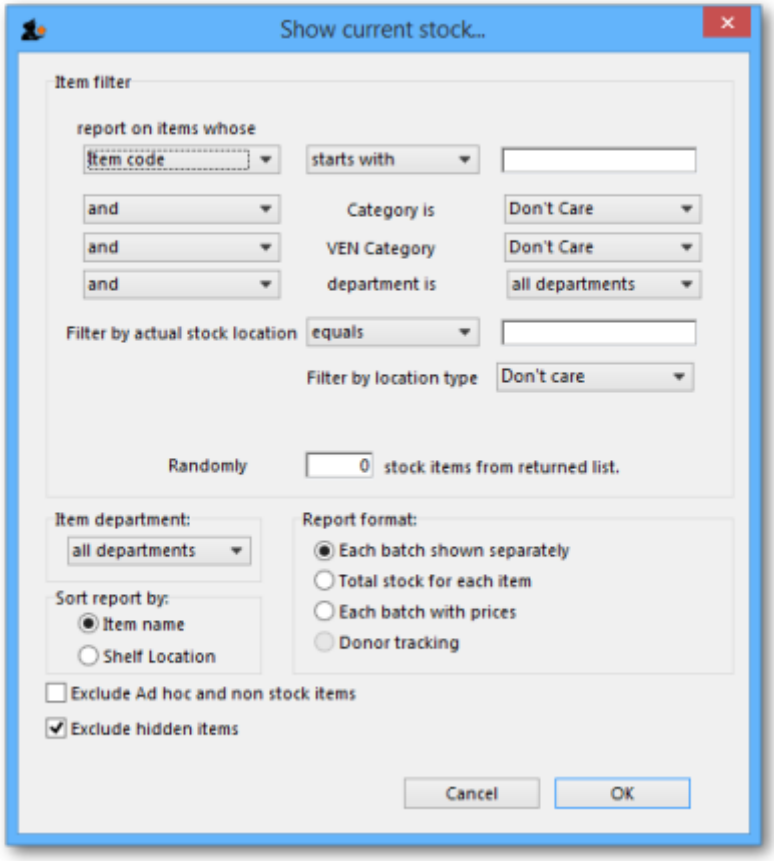
13.02. Stock and items reports

When **Reports > Items and Stock** is chosen, a range of available reports are displayed; click on the one you require to select it:



Current stock



A report will be produced that lists each stock line that is currently showing stock greater than zero. Should you wish the report to include items/batches with zero stock, the box in the lower left needs to be checked.

Item filter

A “Item filter” allows you to enter the normal find item filter criteria to choose which items to include.

Random

A 'Randomly' filter allows you to enter a number of items that will be randomly chosen, and stocktake sheets for those items printed. This facilitates spot checking of your actual stock situation.

Additional options

Should you wish the report to be department specific, then that department should be selected from the drop down list of the departments which you have created.

Should you wish the report to give information on a particular location, then that location should be specified , selecting the appropriate operator of the three available in the drop down box alongside the *Filter by actual stock location* option.

Report format

You can choose from three formats:

- “Each batch shown separately” will also give you a column on the right where, having done a physical stocktake, you can enter the quantity that is actually in stock, allowing any corrections to be made in mSupply.
- “Total stock for each item” will not show individual batches, but the total quantity on hand of each item.
- List the price of each batch in stock, with a total at the end of the report.

The lines are reported alphabetically either by item name or shelf location, depending on what you have chosen in the “Sort report by” options

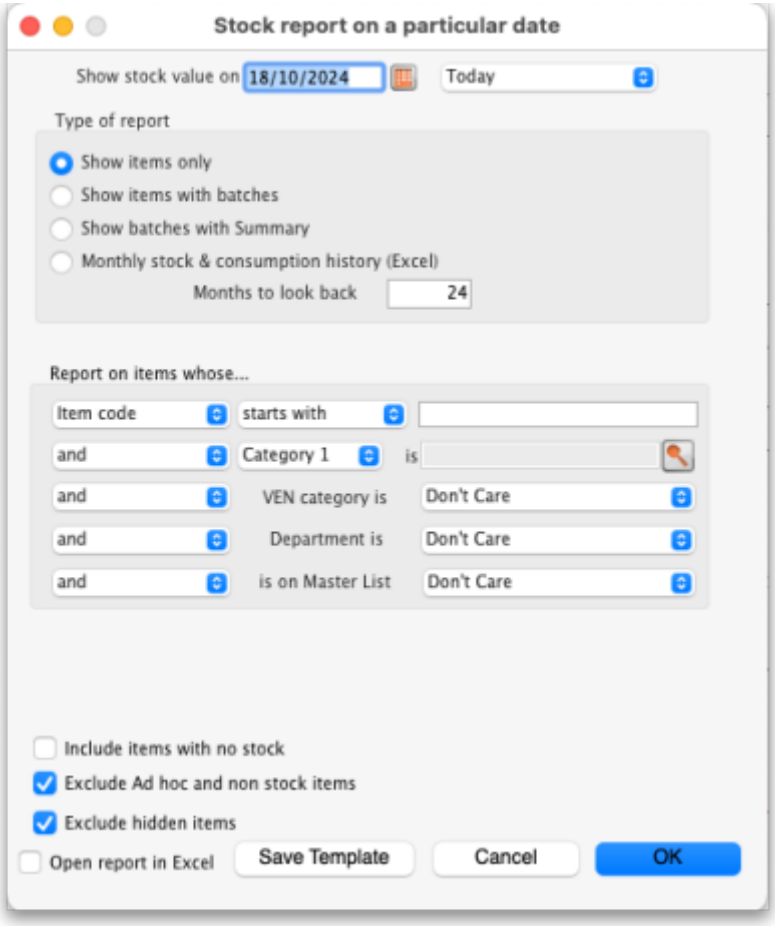
Donor reporting

mSupply provides the feature of printing the Donor name on the Current Stock report so that organisation donating the goods can be identified and tracked.

Stock on date

This report allows you to produce a report for the stock in your store on a particular date. The stock shown will be the stock at the END of the day. If you want to see the stock at the beginning of the day, choose the day before in the date selector.

You are shown a window like this:



Enter the date for which you wish to show the stock for.

Type of report

You have 3 options:

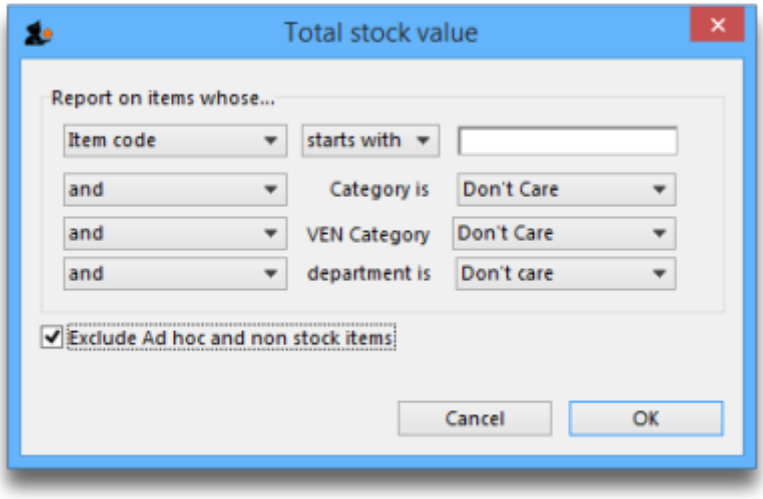
1. *Show items only*: each item in your system will have a single entry with the total quantity on that date.
2. *Show items with batches*: each batch, its expiry and batch number along with the quantity of stock will be shown.
3. *Show batches with summary*: as 2, but every item has an aggregate line before the lines for each batch, showing the total quantity for all batches of the item. So it's a bit like a combination of 1 and 2.
4. *Monthly stock & consumption history (Excel)*: Each item has 3 rows showing its consumption, days it was in stock and its mean stock on hand for each month from the current month to the number of months in the past selected in the **Months to look back** field.

The *Report on items whose* box allows you to restrict the report to certain items only, using item properties or different categories as filters.

Open report in Excel

Check this checkbox to view the report directly in your chosen Spreadsheet program.

Show total stock value



This report is used to find the total stock value either for a particular department or all departments. The drop down menus allow customisation of your report by entering appropriate search criteria from the many options.

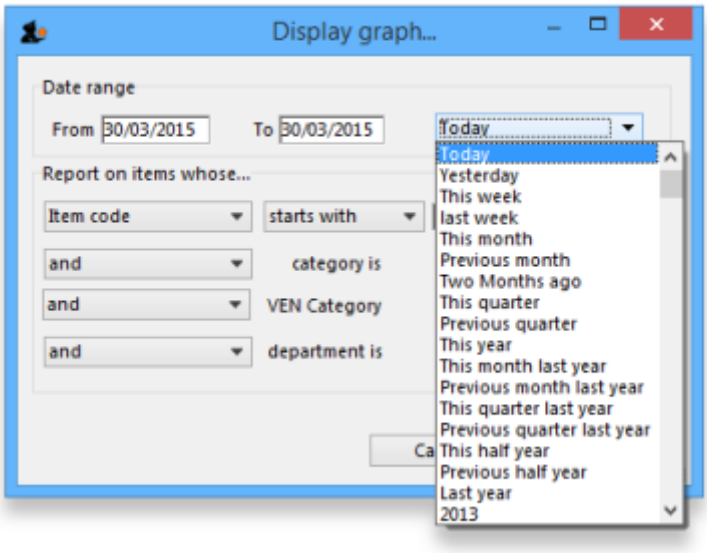
Check this checkbox to directly open the report in Excel rather than printing.

Graph: stock by item

This report shows a graph for an item or items showing the quantity of stock on hand for each day over a defined period.

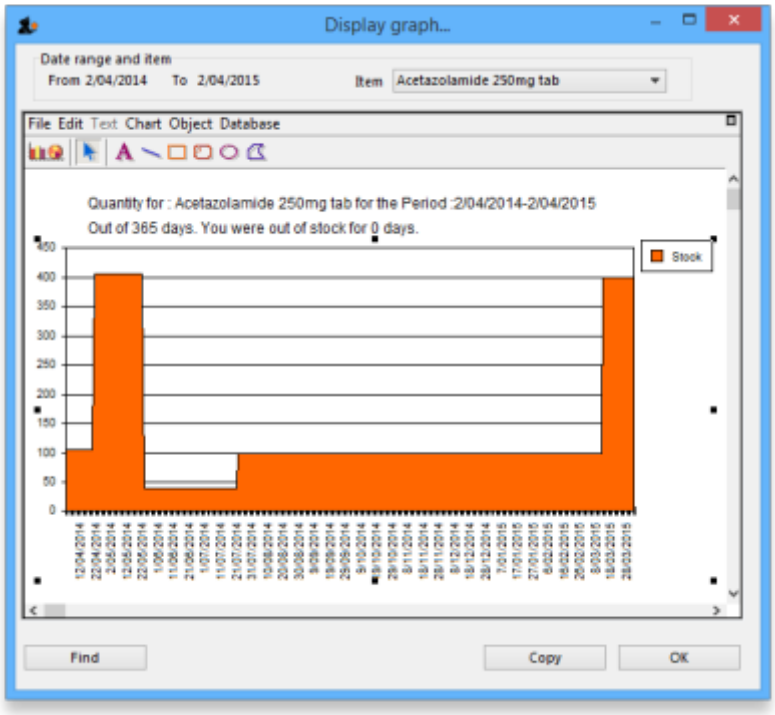
Note that if you have allowed editing of *confirm dates* on transactions, mSupply's ability to calculate accurately the data used in this report may be affected.

Choosing this item from the menu displays this window:



Enter the date range, or select the required period from the drop down list, the items on which you wish to report, and appropriate filters, if any. Remember you can use the item flag field to select an ad hoc list of items to include in your report.

Clicking OK displays a window where you are shown a graph of the quantity in stock on each day for the first item that matched the criteria you entered.

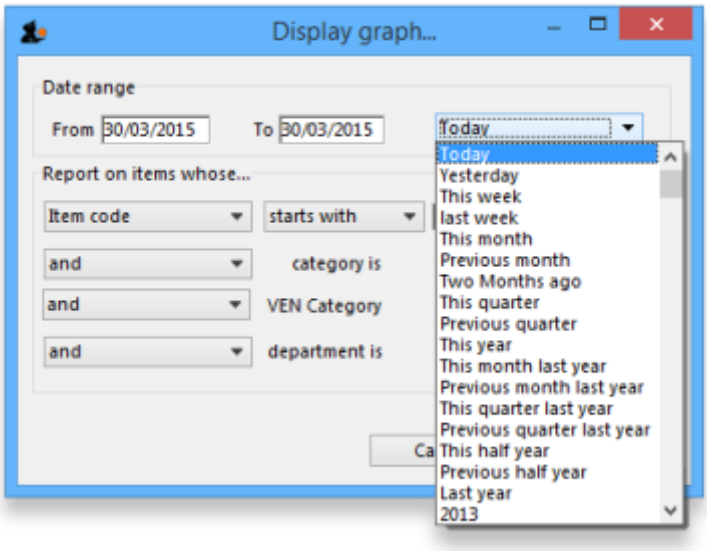


This window also displays a list of items that were found. To display the graph for a different item, choose it from the list.

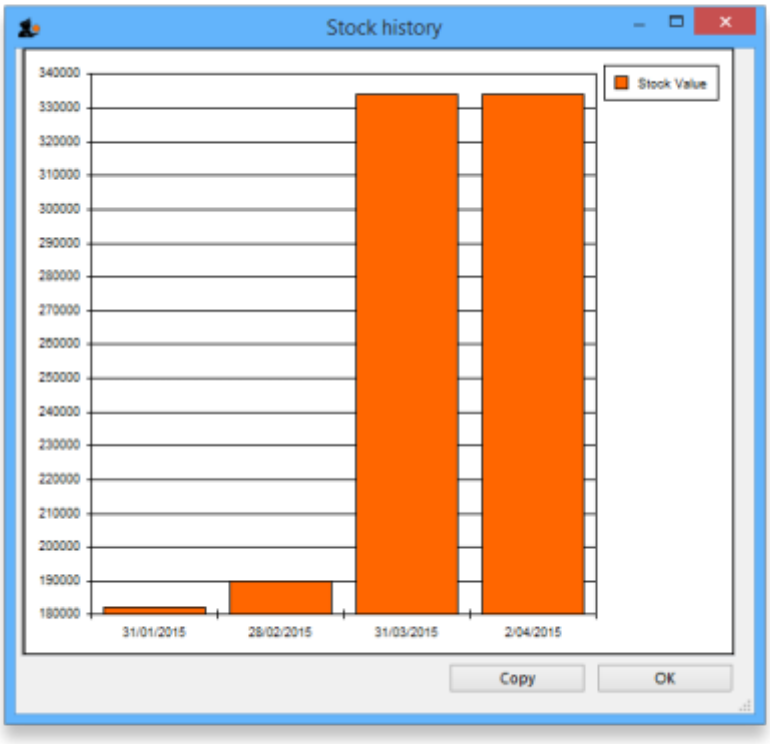
This report can be used as one of a set of key indicators for performance of a facility by comparing days out-of-stock of key items from one year to the next.

Graph: total stock

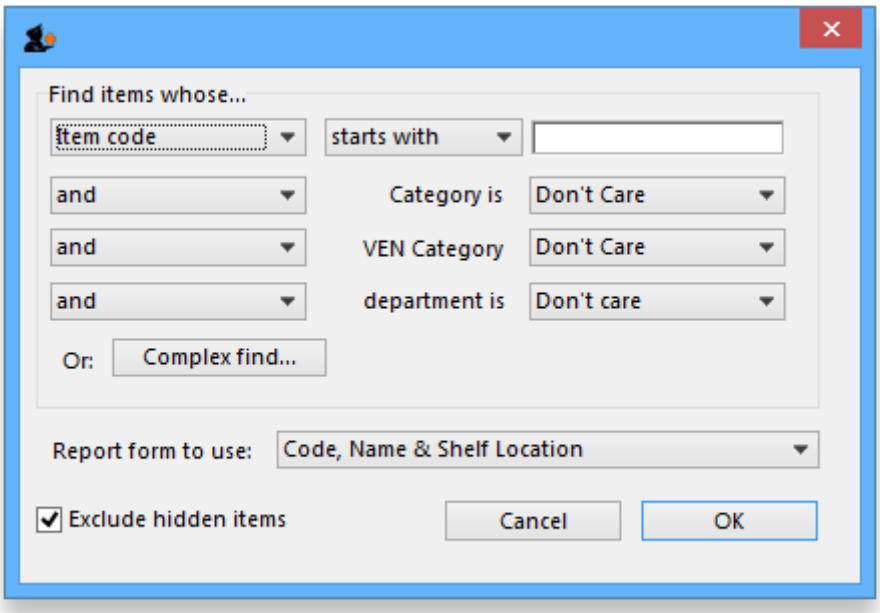
The total stock graph report allows you to view the value of your stock over a desired period of time. When you choose total stock graph, you are able to enter the required period which you would like to view:



Select OK and a graphical stock history report showing stock value will be displayed



Item list



This report allows you to print a list of you items in certain formats.

There are 3 options in the **Report form to use** drop down list:

- *Code, Name and Shelf Location*: Shows exactly what is says with current stock on hand:

Item list report: for store(s) Tamaki Central Medical Store

code	item name	Item Location	Stock on hand
030063	Acetylsalicylic Acid 100mg tabs	A1.B01.C3	199300
030062	Acetylsalicylic Acid 300mg tabs	B1	4000
030453	Amoxicillin 250mg tabs	-	6506500
050457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bot/100ml	B1	420
041011	Artesunate Injection Ampoule/60 mg	A1.B01.C3	5750
201116	Bandage W.O.W. 15cm wide x 5m roll	A1.B01.C3	4308
047288	Benzyl penicilin Injection 1000000 Unit	B3	850
047290	Benzyl penicilin Injection 500.0000 Unit (300 mg)	A2.01.C	50150
031661	Captopril scored 25mg tabs	A2.01.C	47000
78373	Clotrimazole cream 60 ml	-	2300
042304	Cloxacillin Sodium Injection Powder Vial/500mg	A1.B01.C3	350
12653	Cotrimoxazole syrup 5ml	-	7350

- *Code, Name, Shelf Location with Item Long Description*: Shows the same as the previous one but includes the Item long description.
- *List of items in Catalogue*: Shows item details including the catalogue pack size and item custom field 6 value all separated out by the hierarchical item category 1. Looks like this:

List of Items in Catalogue

Dressings

Dressings

DRESSINGS

Code	Description	Item Category 2	VEN	Catalogue Pack size	user_field_6
201116	Bandage W.O.W. 15cm wide x 5m roll		V	12	534

Medicines

Anit-infectives

ANTI-INFECTIVES

Code	Description	Item Category 2	VEN	Catalogue Pack size	user_field_6
050457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bot/100ml		V	10	273
042304	Cloxacillin Sodium Injection Powder Vial/500mg			50	201
047283	Penicillin Benzyl Penicillin PFI 1 MU=600 mg		V	50	238
047287	Penicillin Procaine Benzyl PFI 3 MU=3g			25	241
038510	Potassium Permanganate Aqueous Solution 1:10,000		E	1	
049542	Vancomycin HCL Injection Vial/250mg			1	264
049543	Vancomycin HCL Injection Vial/500mg		E	1	265

ANTI-TUBERCULOSIS

Code	Description	Item Category 2	VEN	Catalogue Pack size	user_field_6
098350	TB Rifampicin+Isoniazid (R+H) 150/150mg tabs			672	419

Cardiac

ANTI-ANGINAL

Code	Description	Item Category 2	VEN	Catalogue Pack size	user_field_6
030063	Acetylsalicylic Acid 100mg tabs		V	100	

ANTI-HYPERTENSIVE

Code	Description	Item Category 2	VEN	Catalogue Pack size	user_field_6
031661	Captopril scored 25mg tabs			250	52

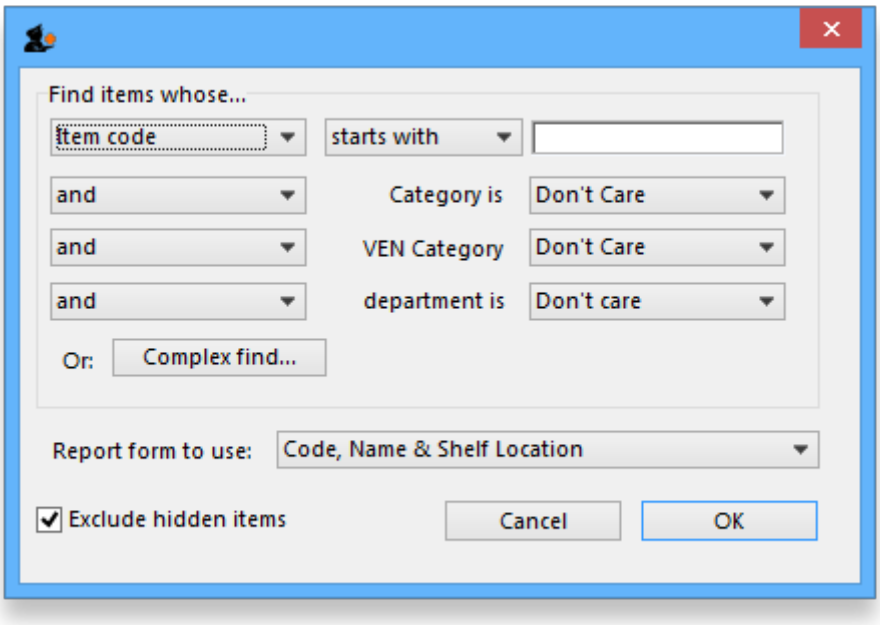
General

Local / remote report

This option will only show “local data” as an option unless you purchase a web services enabled version of mSupply, in which case you can view reports from remote locations running mSupply. Contact us for more information.

Items out of stock

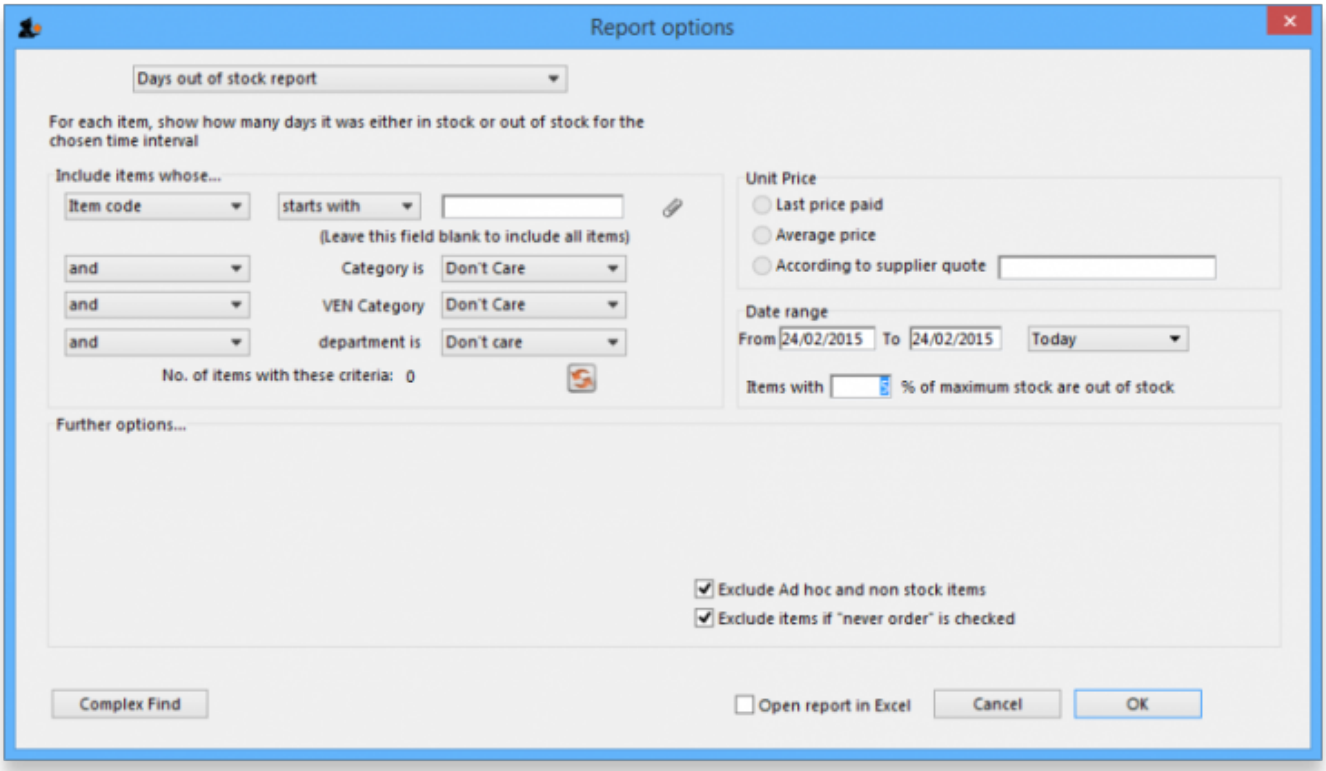
Selecting this report displays this window:



Specify your required options from the drop down lists;

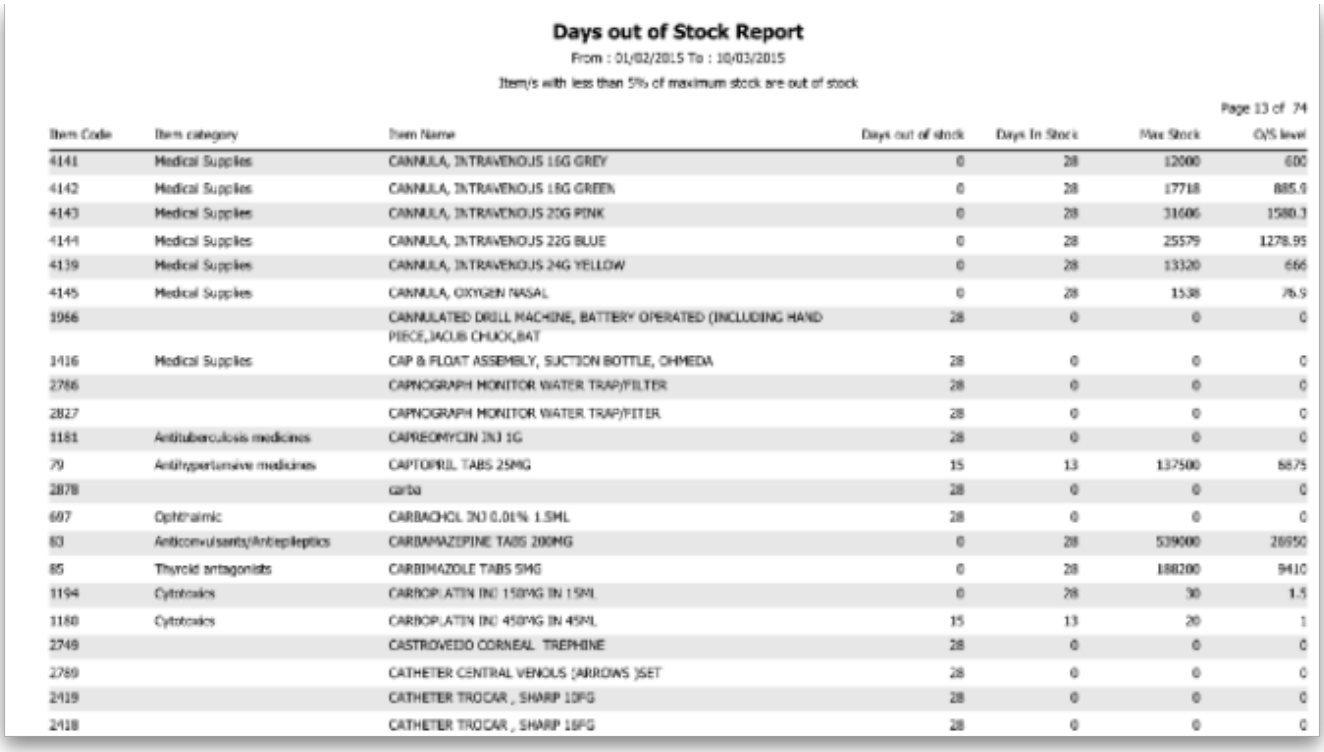
Days out of stock

Selecting this report displays this window:



Specify your required options from the drop down lists; the desired period may be identified either by entering dates in the *From* and *To* fields, or by using the drop down list to the right.

Clicking ok will generate a report like the one below:



Days out of Stock Report

From : 01/02/2015 To : 10/03/2015

Item/s with less than 5% of maximum stock are out of stock

Page 13 of 74

Item Code	Item category	Item Name	Days out of stock	Days In Stock	Max Stock	O/S level
4141	Medical Supplies	CANNULA, INTRAVENOUS 16G GREY	0	28	12000	600
4142	Medical Supplies	CANNULA, INTRAVENOUS 18G GREEN	0	28	17718	885.9
4143	Medical Supplies	CANNULA, INTRAVENOUS 20G PINK	0	28	31606	1580.3
4144	Medical Supplies	CANNULA, INTRAVENOUS 22G BLUE	0	28	25579	1278.95
4139	Medical Supplies	CANNULA, INTRAVENOUS 24G YELLOW	0	28	13320	666
4145	Medical Supplies	CANNULA, OXYGEN NASAL	0	28	1538	76.9
1966		CANNULATED DRILL MACHINE, BATTERY OPERATED (INCLUDING HAND PIECE,JACUB CHUCK,BAT	28	0	0	0
1416	Medical Supplies	CAP & FLOAT ASSEMBLY, SUCTION BOTTLE, OHMEDA	28	0	0	0
2786		CAPNOGRAPH MONITOR WATER TRAP/FILTER	28	0	0	0
2827		CAPNOGRAPH MONITOR WATER TRAP/FITER	28	0	0	0
1181	Antituberculosis medicines	CAPREOMYCIN INJ 1G	28	0	0	0
79	Antihypertensive medicines	CAPTOPRIL TABS 25MG	15	13	137500	6875
2878		carba	28	0	0	0
697	Ophthalmic	CARBACHOL INJ 0.01% 1.5ML	28	0	0	0
83	Anticonvulsants/Antiepileptics	CARBAMAZEPINE TABS 200MG	0	28	539000	26950
85	Thyroid antagonists	CARBIMAZOLE TABS 5MG	0	28	188200	9410
1194	Cytotoxics	CARBOPLATIN INJ 150MG IN 15ML	0	28	30	1.5
1180	Cytotoxics	CARBOPLATIN INJ 450MG IN 45ML	15	13	20	1
2749		CASTROVEDO CORNEAL TREPHINE	28	0	0	0
2789		CATHETER CENTRAL VENOUS (ARROWS)SET	28	0	0	0
2419		CATHETER TROCAR , SHARP 10FG	28	0	0	0
2418		CATHETER TROCAR , SHARP 18FG	28	0	0	0

Clicking the **Complex find** button opens the Query Editor, allowing you to enter specific criteria relating to your search.

You may also specify what level in percentage terms of the maximum stock should be considered as being “out of stock..” Here's an example over 1 month:

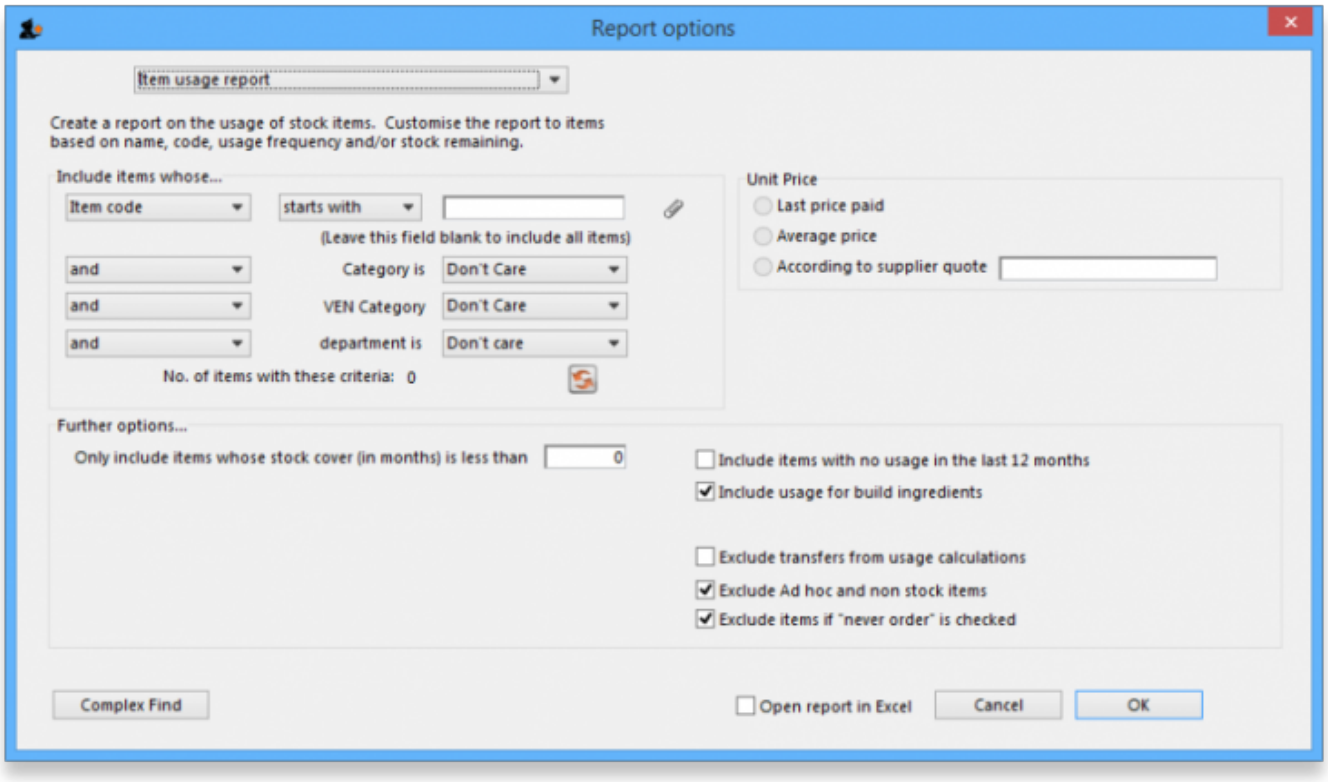
Day of month	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
stock on hand	20000	20000	20000	2000	1000	500	300	200	30000	25200	20200	18000	18000	18000	10000	5000	5000	2000	2000	800	800	20000	20000	20000	20000	20000	20000	20000	20000	20000
Out of stock						😫	😫	😫	This day had maximum stock. 5% of 30000=1500											😫	😫									
Note the 5% stock out level = 1500																														

Item usage

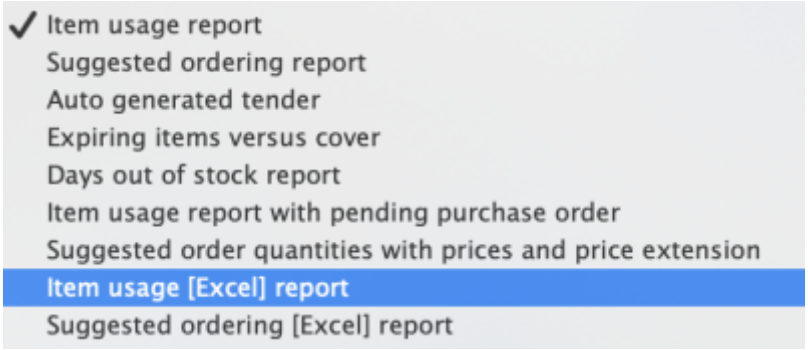
The Item usage report gives you a breakdown of item usage for the last few months, with summaries for the last 2 years, It also includes stock on hand and stock on backorder for each item in the report.

The report produced is very useful for forecasting or for seeing a list of items that need to be ordered.

When you choose the menu item you are shown a window like this:

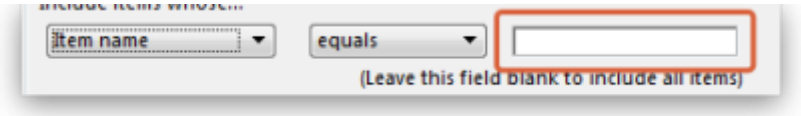


You can choose the type of report you want to run from the drop-down menu. Select the **Item usage [Excel] report** to create an Excel report.



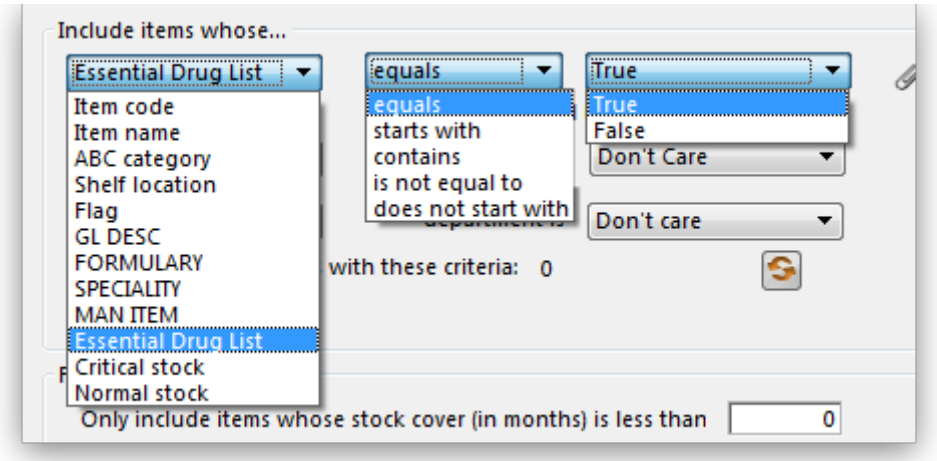
This menu also includes an item usage report, a suggested ordering amount report, or to auto generate a tender from the drop-down list at the top. This form is used for all 7 functions. (Note that the *Item usage report with pending purchase order* option will show you item usage with details of items currently on order and their expected date of delivery).

If you want to report on all items, leave the item name field blank:



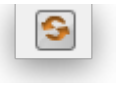
otherwise enter an item name or code. For example, to report on amoxycillin stocks, you could enter “amox” into the field.

Depending on the entry in the first field, further options are available in the following two fields, but these will vary according to the entry in the first field. Among the options, he first field allows you to make your selection from the names given to custom item fields in the Preferences if this feature has been used.

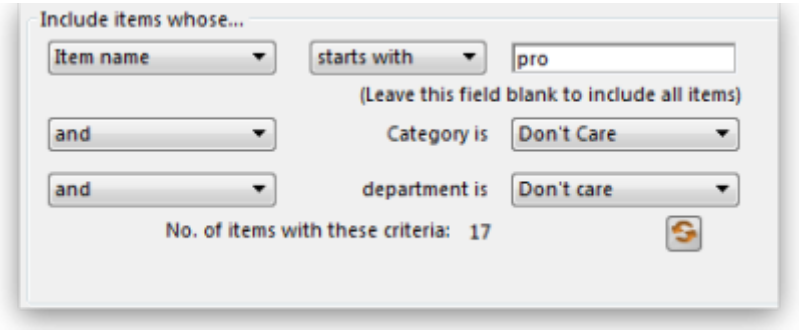


If you wish to use shelf locations, then select the *shelf location* option and specify the desired shelf.

You can use the drop-down list to find Items with a particular code, or to use the values you have entered into one of the custom user fields. If this isn't powerful enough, use the *complex find* button to display the full query editor.

Click the refresh button  to calculate the number of items these basic parameters will find. This screenshot shows that 17 items meet the parameter specified, i.e. items whose names begin

with '*pro*';



Only include items whose stock cover is less than...

If you want only to report on items whose stock is low, enter the threshold for days of stock on hand into the second field. For example, entering 90 into this field will only include items in the report whose stock is not sufficient to cover average usage for the next 90 days.

The default of `0` (zero) in this field will include *all* items with any amount of stock remaining.

Include items with no usage in the last 12 months

If this box is checked, items with no usage over the last year will be included. This check box will have no effect if the previous “days cover” field is filled in, as an item with no usage will have “infinite” cover- any stock you do have is going to last you forever!

Include usage for build ingredients

If you manufacture items, you can choose whether the use of ingredient lines in manufacturing is included in the report or not.

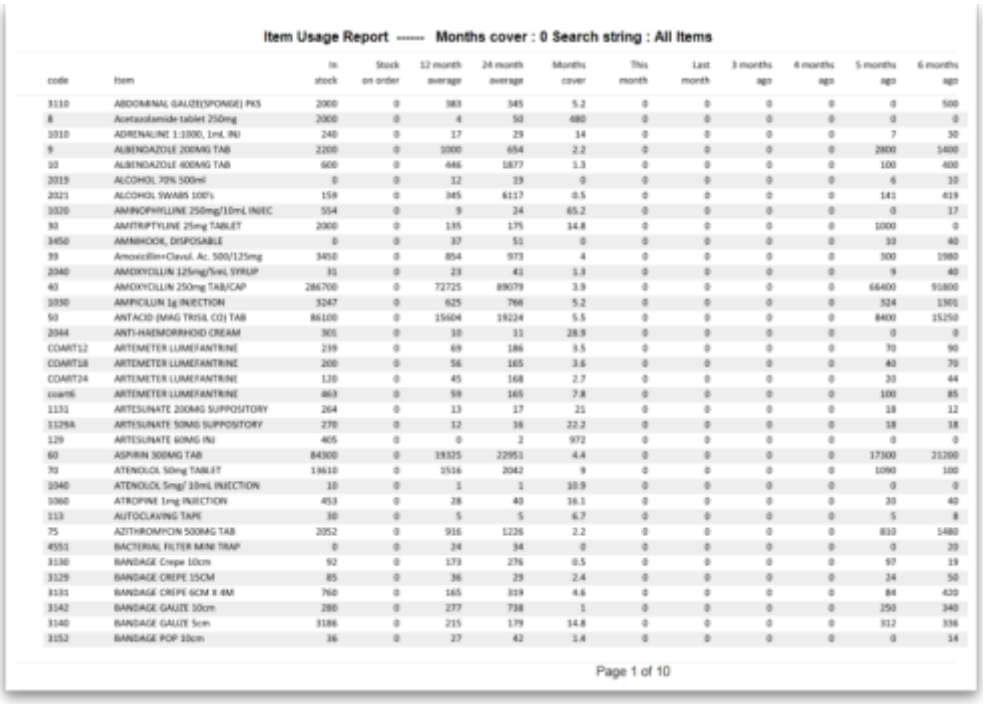
Open report in Excel

Checking this box opens the report in Excel (or any installed spreadsheet program).

Note: If you chose the **Item usage [Excel] report** from the dropdown list, the Excel box will already be checked.

If you want to save the report in Excel (or any installed spreadsheet program), choose File > Save as.

Item usage report preview



Item Usage Report ------ Months cover : 0 Search string : All Items

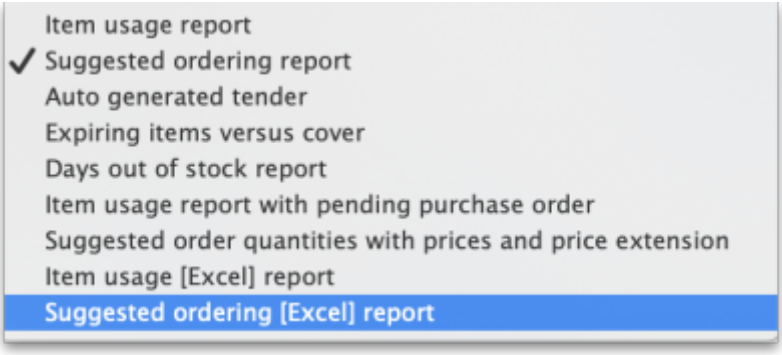
code	Item	In stock	Stock on order	12 month average	24 month average	Months cover	This month	Last month	3 months ago	4 months ago	5 months ago	6 months ago
3110	ABDOMINAL GAUZE(SPONGE) PKS	2000	0	383	345	5.2	0	0	0	0	0	500
8	Acetazolamide tablet 250mg	2000	0	4	50	480	0	0	0	0	0	0
1010	ADRENALINE 1:1000, 1mL INJ	240	0	17	29	14	0	0	0	0	7	30
9	ALBENDAZOLE 200MG TAB	2200	0	1000	654	2.2	0	0	0	0	2800	1400
10	ALBENDAZOLE 400MG TAB	600	0	446	1877	1.3	0	0	0	0	100	600
2019	ALCOHOL 70% 500ml	0	0	12	19	0	0	0	0	0	6	10
2021	ALCOHOL SWABS 100's	159	0	345	6117	0.5	0	0	0	0	141	419
1020	AMINOPHYLLINE 250mg/10mL INJEC	554	0	9	24	65.2	0	0	0	0	0	17
30	AMITRIPTYLINE 25mg TABLET	2000	0	135	175	14.8	0	0	0	0	1000	0
3450	AMNIHOOK, DISPOSABLE	0	0	37	51	0	0	0	0	0	10	40
39	Amoxicillin+Clavul. Ac. 500/125mg	3450	0	854	973	4	0	0	0	0	300	1980
2040	AMOXYCILLIN 125mg/5mL SYRUP	31	0	23	41	1.3	0	0	0	0	9	40
40	AMOXYCILLIN 250mg TAB/CAP	286700	0	72725	89079	3.9	0	0	0	0	66400	91800
1030	AMPICILLIN 1g INJECTION	3247	0	625	766	5.2	0	0	0	0	324	1301
50	ANTACID (MAG TRISIL CO) TAB	86100	0	15604	19224	5.5	0	0	0	0	8400	15250
2044	ANTI-HAEMORRHOID CREAM	301	0	10	11	28.9	0	0	0	0	0	0
COART12	ARTEMETER LUMEFANTRINE	239	0	69	186	3.5	0	0	0	0	70	90
COART18	ARTEMETER LUMEFANTRINE	200	0	56	165	3.6	0	0	0	0	40	70
COART24	ARTEMETER LUMEFANTRINE	120	0	45	168	2.7	0	0	0	0	30	44
coart6	ARTEMETER LUMEFANTRINE	463	0	59	165	7.8	0	0	0	0	100	85
1131	ARTESUNATE 200MG SUPPOSITORY	264	0	13	17	21	0	0	0	0	18	12
11256	ARTESUNATE 50MG SUPPOSITORY	270	0	12	16	22.2	0	0	0	0	18	18
129	ARTESUNATE 60MG INJ	405	0	0	2	972	0	0	0	0	0	0
60	ASPIRIN 300MG TAB	84300	0	19325	22951	4.4	0	0	0	0	17300	21200
70	ATENOLOL 50mg TABLET	13610	0	1516	2042	9	0	0	0	0	1090	100
1040	ATENOLOL 5mg/ 10mL INJECTION	10	0	1	1	10.9	0	0	0	0	0	0
1060	ATROPINE 1mg INJECTION	453	0	28	40	16.1	0	0	0	0	20	40
113	AUTOCLAVING TAPE	30	0	5	5	6.7	0	0	0	0	5	8
75	AZITHROMYCIN 500MG TAB	2052	0	916	1226	2.2	0	0	0	0	810	1480
4551	BACTERIAL FILTER MINI TRAP	0	0	24	34	0	0	0	0	0	0	20
3130	BANDAGE Crepe 10cm	92	0	173	276	0.5	0	0	0	0	97	19
3129	BANDAGE CREPE 15CM	85	0	36	29	2.4	0	0	0	0	24	50
3131	BANDAGE CREPE 6CM X 4M	760	0	165	319	4.6	0	0	0	0	84	420
3142	BANDAGE GAUZE 10cm	280	0	277	738	1	0	0	0	0	250	340
3140	BANDAGE GAUZE 5cm	3186	0	215	179	14.8	0	0	0	0	312	336
3152	BANDAGE POP 10cm	36	0	27	42	1.4	0	0	0	0	0	14

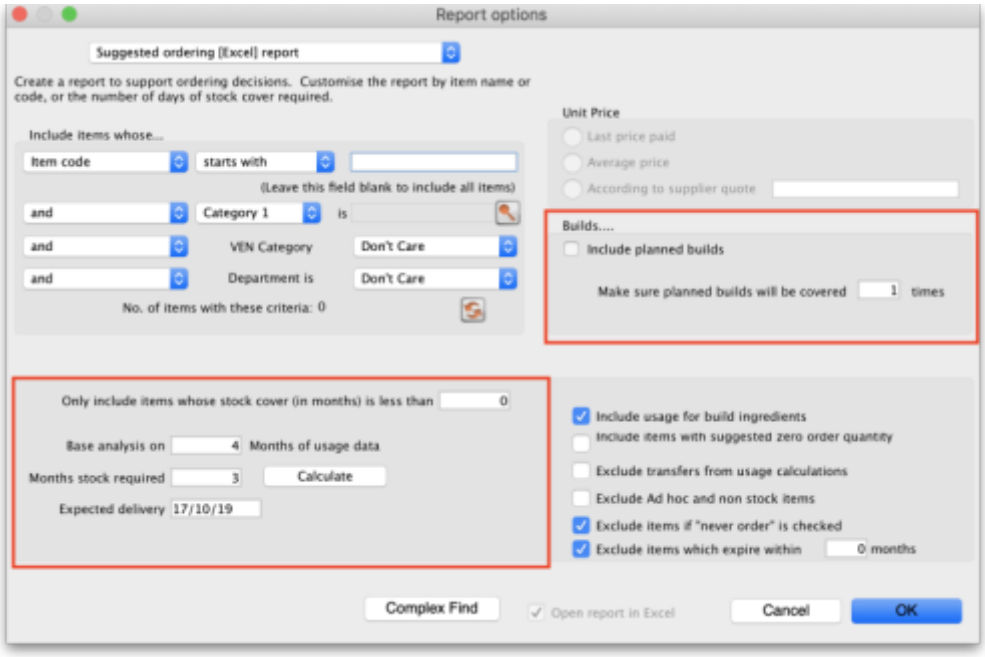
Page 1 of 10

Suggested ordering report

This report shows usage data, months cover of stock remaining and a suggested quantity to order for each item. The Purchaser can review this report to make a final decision on how much stock to order.

From the *Item usage report* dialogue box, select the **Suggested ordering report** option from the drop-down menu. Alternatively, select the **Suggested ordering [Excel] report** to create an Excel report.





Note the extra options for including item usage when calculating item ordering quantities. Also note the option to include ordering for build items. See item builds for more on built items.

Open report in Excel

Checking this box opens the report in Excel (or any installed spreadsheet program).

Note: If you chose the **Suggested ordering [Excel] report** from the dropdown list, the Excel box will already be checked.

If you want to save the report in Excel (or any installed spreadsheet program), choose File > Save as.

Suggested ordering report preview

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Suggested Ordering Report: Months cover : 24 months. Search string : amo. Based on last 12 months usage data.													
2														Page
3	Item Code	Item Name	VEN	Item category	Stock on hand	Backorder	12 months average	24 months average	Monthly usage for the last 12 months	Months Cover	Quantity on Order	Ordered quantity in use	Suggested order	Forecast used
4	Amosyr	Amoxycillin 125mg/5ml susp	V	06.2.1 Beta Lact	4120	0	3297	3673	3549	1.2	40012	40012	41052	N
5	Amo500	Amoxycillin 500mg cap	V	06.2.1 Beta Lact	129000	0	90300	92159	96633	1.3	600000	600000	1590200	N
6	Amclav	Amoxycillin+Clavulanate 500r	E	06.2.1 Beta Lact	21600	0	2482	2283	2607	8.3	30000	30000	10960	N

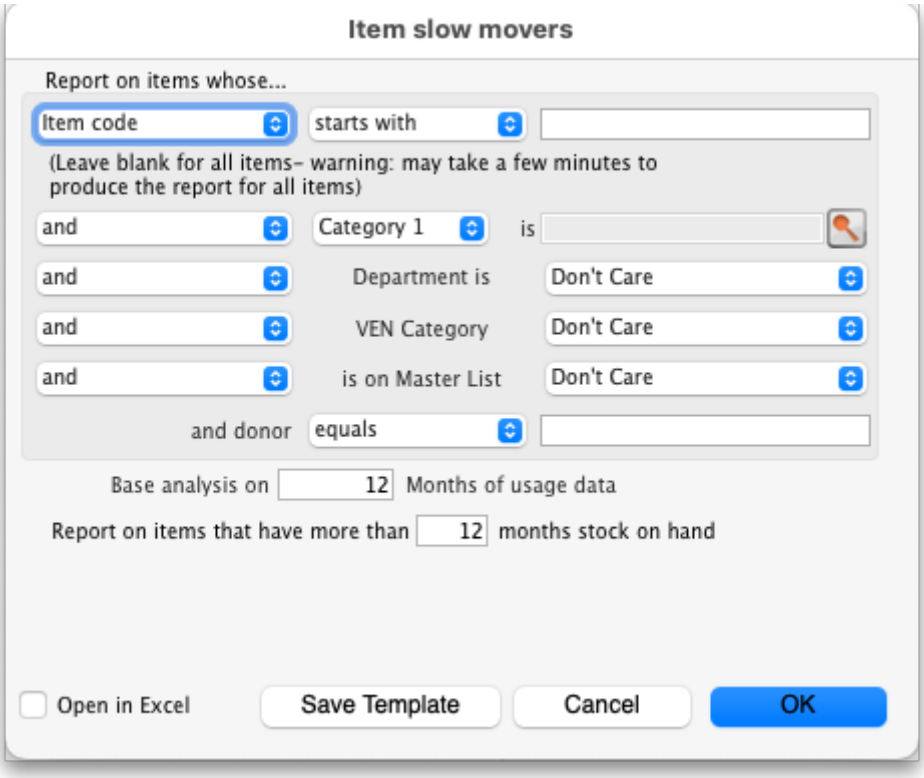
Item usage with outstanding purchase orders

The window that appears when you choose this report is the same as the previous one; with exactly the same options available; the report produced differs only in that any lines having outstanding Purchase Orders have the relevant details of the Purchase Order displayed.

Item slow movers

The Item slow movers report shows all items that have more than a specified number of months worth of stock.

You will be shown a window to enter the item details:



Enter your search criteria in the top section.

Item name field

- If you want a report for all items, leave this field blank. Otherwise enter some text to reduce the report to just a few items (e.g. entering “am” will produce a report of just the items whose name starts with “am” (Amitriptylline, Amoxycillin, etc)

Category and department

- Use the drop down boxes as appropriate to select Category and/or Department if required.

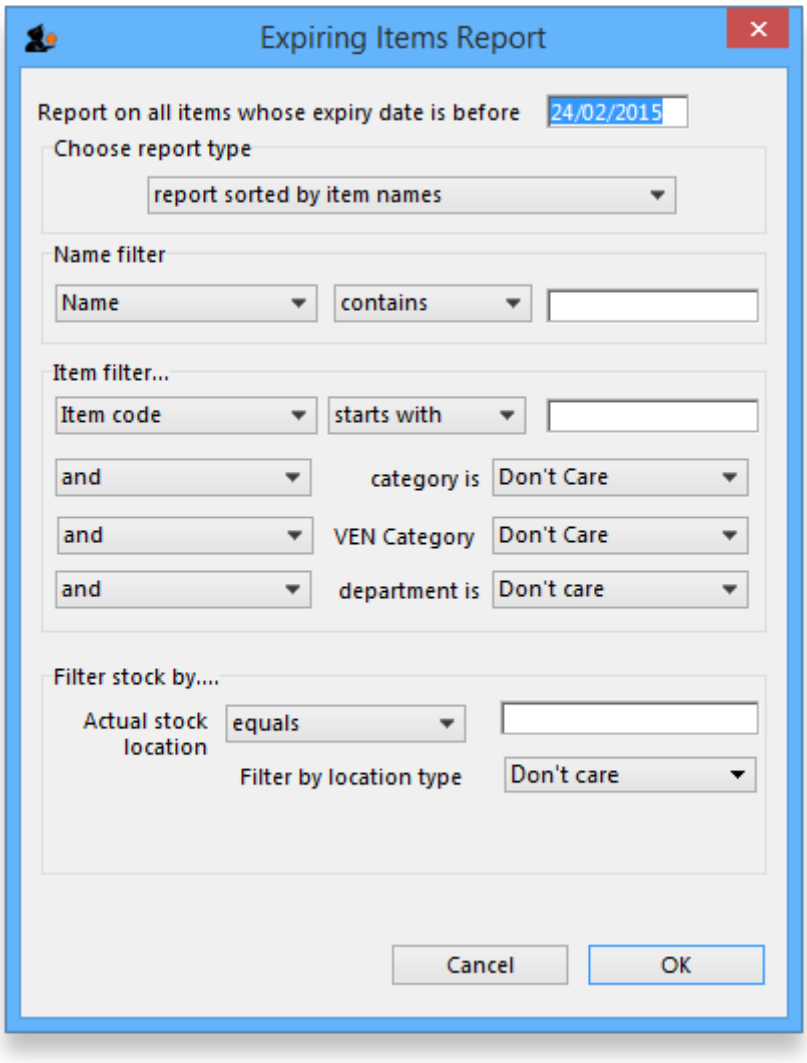
Months of stock

- Enter the number of months of stock to report on. Items with more than this number of months of stock on hand will be included in the report. The correct figure to enter here depends upon your desired stock turnover. In general, if you are turning over your stock 3 or 4 times a year, you would want to know about items which have more than 8 months of stock on hand.
- The report is calculated using the last 12 months usage as a guide to the average monthly usage.

You can check the Open report in Excel box to open the report in Excel, or any installed spreadsheet.

The report produced is very useful for managing under-performing inventory. It allows you quickly to obtain a list of items where a reduction in stock is desirable.

Expiring items



This report will ask you to enter a date, and will then give a report of all item lines in stock whose expiry date is before the date you have entered.

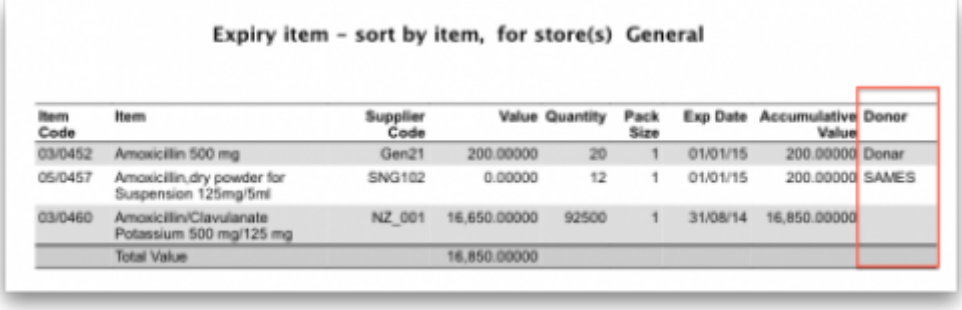
For example, entering 31/8/11 will display all items with expiry dates before 31st August 2011 (Enter the date in short format in the way your computer is set to handle dates (DD/MM/YY or MM/DD/YY or YY/MM/DD).

You can additionally filter the stock by the location type or the actual location in the warehouse. This is helpful for reporting on items in certain sections of your warehouse.

Three report type options are offered; select as appropriate. You may refine the search by using the *Name filter* and/or the *Item filter.*.

Donor reporting

mSupply provides the feature of printing the Donor name on the Expiring Items report so that the organisation donating the goods can be identified and tracked. This can help with disposing of or returning goods to the Donor.

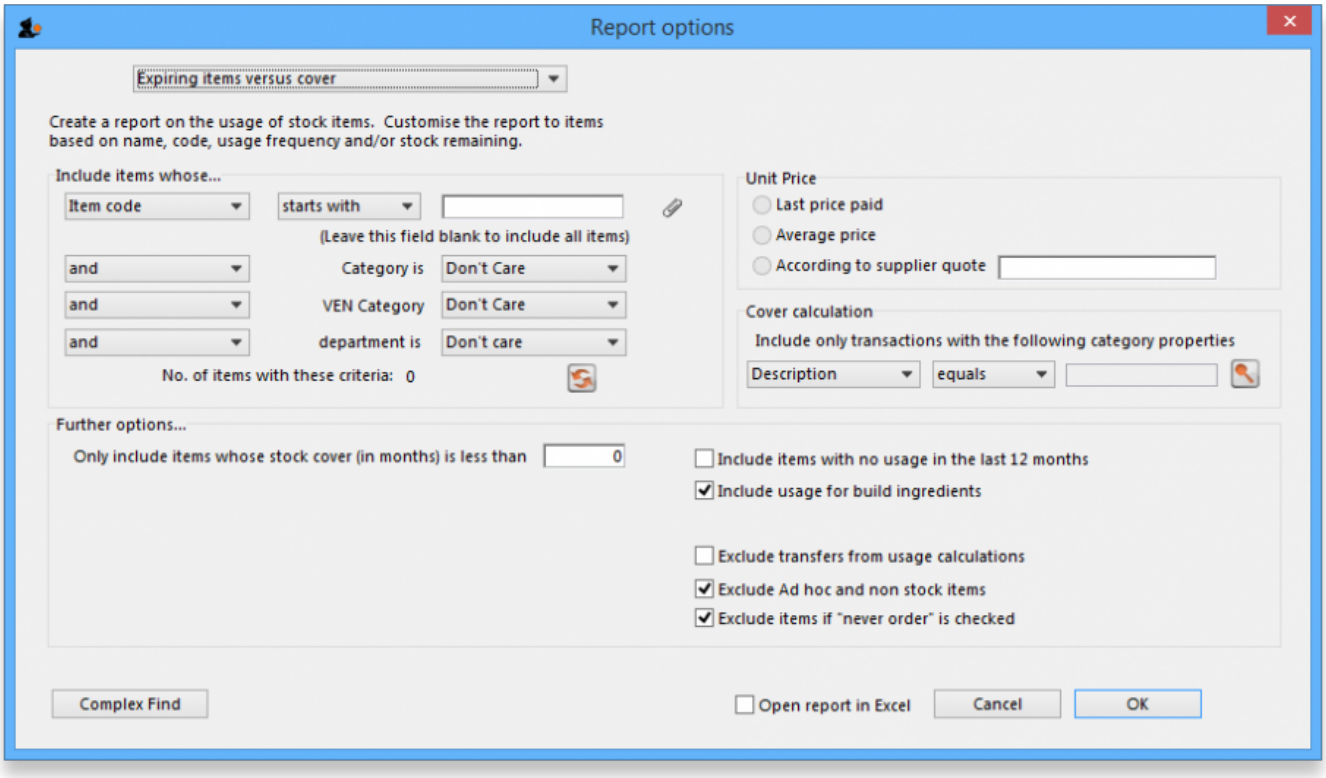


Expiry item – sort by item, for store(s) General

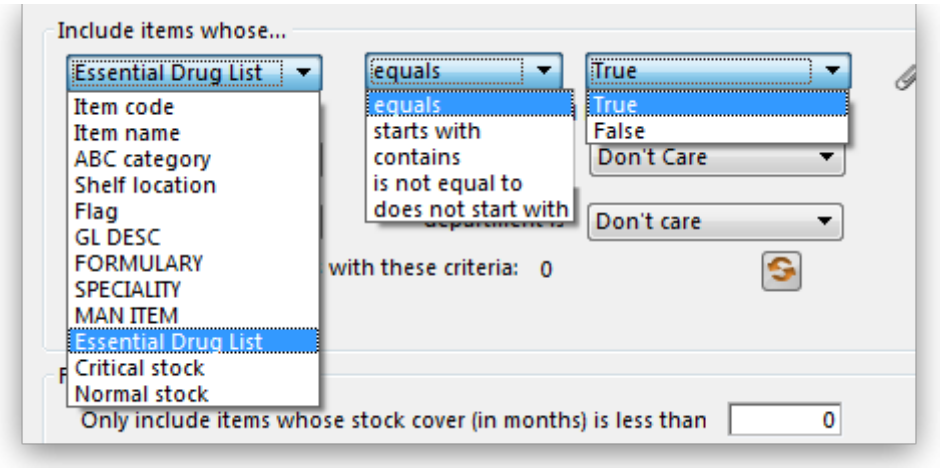
Item Code	Item	Supplier Code	Value	Quantity	Pack Size	Exp Date	Accumulative Value	Donor
03/0452	Amoxicillin 500 mg	Gen21	200.00000	20	1	01/01/15	200.00000	Donar
05/0457	Amoxicillin,dry powder for Suspension 125mg/5ml	SNG102	0.00000	12	1	01/01/15	200.00000	SAMES
03/0460	Amoxicillin/Clavulanate Potassium 500 mg/125 mg	NZ_001	16,650.00000	92500	1	31/08/14	16,850.00000	
	Total Value		16,850.00000					

Expiring items vs. cover

The Expiring items vs. cover report shows the number of months of cover for items you have in your store. The cover calculation uses the last 12 months of usage data to calculate the AMC which is used to determine months of cover.



Many filters may be applied in the drop down lists, which are the same as described under *Item usage...* above.



Note that If the field you are searching is a boolean field, e.g.Essential Drug List, “false” appears as the default entry, which you may change to “true”.

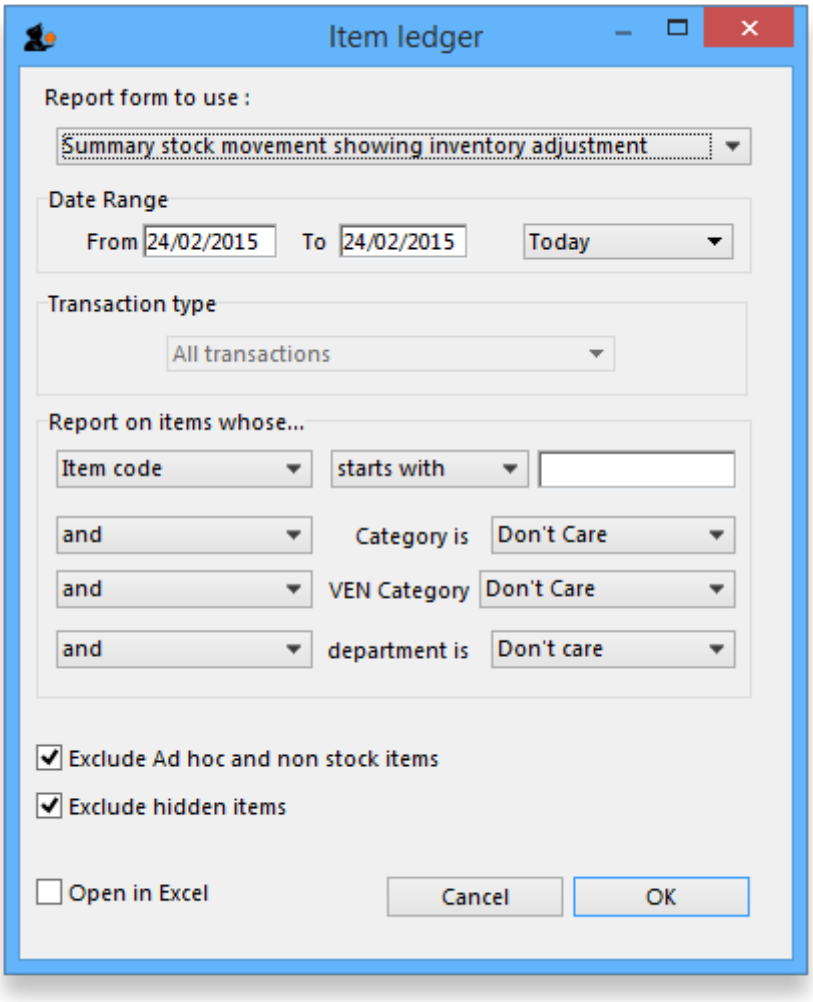
Cover calculation

This allows the user to include or exclude specific categories to be used in calculating coverage. Clicking the magnifying glass to the right lists categories to be chosen.

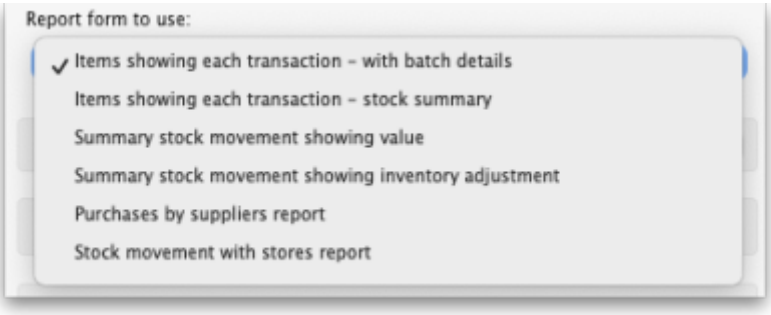
If you wish mSupply to remember the criteria which you have entered, click on the paperclip icon, and your selections will appear the next time you open the report.

Once you have selected your required criteria, click on the *Refresh* icon to show the number of items which match your criteria, and which will, therefore, feature in the report.

Item ledger



Ledger entries may be viewed in this report; different formats of report are available in addition to several filter options from the drop down lists, so the report may be designed to meet your specific requirements.



*Previous: **13.01. Report basics** | | Next: **13.03. Transaction reports***

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