

# mSupply

user guide



Version 3.B1 [Aug 2009]



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# Introduction

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Thank you for choosing mSupply's HIS module.

Before you launch in (if you haven't already!), we suggest you plan to take the following steps.

- Read the rest of this introduction.
- Read the setup, tutorial and licence chapters in this manual.
- If you are not sure, why not try, and email us if you get stuck.

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## Why an HIS module for mSupply?

As mSupply has become more widely used, it has become clear to us that many hospitals that use mSupply now have a functioning computer system in their pharmacies, and not much anywhere else. Other clients have spent close to \$1 million on systems that we don't think are financially justified in their environments.

By incorporating an HIS module into mSupply it allows a hospital to cover the basics while sharing a server with the pharmacy, so a hospital that uses mSupply can start using the HIS module with little or no extra hardware costs.

mSupply and the HIS module share a common patient database, meaning that the pharmacy and other hospital functions are integrated.

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## What does mSupply-HIS do?

First, we should say that mSupply-HIS is not a fully-fledged Hospital information system. It is designed to concentrate on a subset of a hospital's activities that form the core of its operations.

It does handle:

- Patient registration and recording common static patient data.
- Recording a hospital's wards and beds.
- Recording inpatient admissions (admitting a patient, assigning them to a ward and bed).

- Recording ICD-10 disease codes for each patient admission. You can assign multiple disease codes, and prioritise them (primary, secondary, etc..)
- Moving patients to different wards/beds
- Recording discharge data (patient status at time of discharge)
- Reporting on
  - Bed occupancy rates as a whole and by ward
  - ICD 10 statistics

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## mSupply and mSupply-HIS

While mSupply and the HIS module are integrated, they also operate independently, and it is possible to use either module without using the other one.

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## Using this guide

This user guide is designed for either printing or viewing within Acrobat Reader or other PDF viewer. It requires Adobe Reader 6 or later (or Foxit Reader or the fantastic Skim on Mac).

In your PDF reader choose *show bookmarks* from the window menu. You can then easily navigate through the sections and chapters by clicking on a bookmark. You can also use the *find* command to find words and topics which interest you.

The user guide has a comprehensive index, and if you are viewing the PDF version, clicking a page number in the index will take you to that page.

The software is under constant development. As new features and facilities are added, we strive to ensure that the user guide and the graphics that it contains reflect these developments, but occasionally you may find that there are slight differences between the program itself and the manual or its graphics. These are usually of a minor nature, but should you have any difficulties, do please send us an e-mail with details of your problem.

As mSupply-HIS is compatible with both Windows OS and Apple Mac OS, there is a mix of screenshots in the manual taken from each operating system.

### About us

Sustainable Solutions was established in 2001 with the primary aim of supplying and supporting mSupply software in developing countries. We are committed to producing software that enables excellence in health care delivery. We take pride in looking after people and organisations who choose to use our services.

### We are based in Kathmandu, Nepal and Auckland, New Zealand

We can be contacted at:

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- PO Box 8975, EPC 355, Kathmandu, Nepal
- 6a Challenger St, St Heliers, Auckland, 1071, New Zealand

Please feel free to request more information.

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### Thanks

Lots of people have contributed to make mSupply what it is. Most of the following people have made positive contributions ;-)

Bandana Baidya, Craig Drown, Ujwal Khatry, Peter Laing, Sajjan Ojha, John Ross, Leif-Erik Stabell.

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### Copyright

mSupply-HIS software is copyright Sustainable Solutions, 2009-2010.

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### Licence Agreement and Free use conditions

Commercial users or any user wanting multi-user functionality enabled must obtain a licence from Sustainable Solutions.

Please view our web site <http://www.msupply.org.nz> for up-to-date pricing.

Non-commercial use

- You may use mSupply software in single user mode for free as long as it is used:

- in an approved not-for-profit organization
- in a developing country.
- Sustainable Solutions shall be the sole arbiter of those qualifying for free use.
- All users (free and paid) must register with Sustainable Solutions to obtain a registration code. Information supplied will not be used for any purpose other than generation of registration code.
- Users who have obtained a free licence number are not eligible for free support, although we will sometimes choose to give support.

Please contact us for quotes regarding customised versions and installation and training packages.

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### Changes in recent versions

The first version of mSupply-HIS is version 3. This synchronizes the version numbers with mSupply.



# Conventions used in this manual

If you aren't familiar with using a computer, you should read this chapter, and also work through the tutorial.

## Menus

Choose *new item* from the *Item* menu (sometime also written as *Choose Items*)  
*New item* means.... Click on the word *item* in the menu bar, then choose *new item* from the menu that drops down.

## Field

An area where you can make an entry, either text or numbers - usually a white coloured box.

## Moving between fields

You can move from field to field by using the *TAB* key. Holding down the *SHIFT* key while pressing the *TAB* key will move you from field to field in the reverse order to normal. (Note that on Windows, some buttons are "tabable" - that is, pressing the tab key moves the "focus" (the active area) to a button. Pressing the "return" key then activates that button.)

## Check box

is a box that changes from having an "X" in it to being blank each time you click in it. To "check" a check box means to click it so that an "X" appears (if there is not one already present). Check boxes have text beside them explaining what the box is for.

## Highlighted button

Pressing the *ENTER* key will operate the highlighted button in a window, which is usually the OK button.

## Drop-down list

A list that is shown when you click on an item. The item you choose becomes the current choice for that list. Only one item can be chosen at a time.

## Double-click

In lists (e.g. of Names or of Items), double click the left mouse button on a line to edit or view more details.

## Insertion point

is the blinking line in a field that indicates which field is currently accepting typed input.

## OK button

The OK button can be operated by pressing the "Enter" key.

## Cancel button

The cancel button can be controlled by holding down "CONTROL" ("COMMAND" on Macs), and pressing the period key (full stop).

## Path to a file

(Or to a document) is a way of describing where a document is stored on your hard disk. It is written as "hard disk:folder 1: folder 2:document", which is the same as "C:\folder 1\folder 2\document".

## Modifier keys

Windows and Macs have different modifier keys. We've tried to list both in the manual, but sometimes one might slip through, so

The Windows "CONTROL" key does the same as the "COMMAND" (cmd) key on Macs

The Windows "ALT" key does the same as the "OPTION" (opt) key on Macs.

## Column headings

In mSupply column headings can be clicked to sort the list by that item..

# Setting up mSupply-HIS

## Hardware requirements:

### Windows

Hardware requirements vary widely depending on what you want to use mSupply for  
Here's a rough guide.

Absolute minimum	Windows 2000 or XP computer with a 500 Mhz Pentium processor or equivalent.
Suggested single user or Client machine for use with server.	Win 2000 or later, 800 Mhz or faster Pentium processor or equivalent, 256Mb RAM
Suggested server	Win XP/2003 or later, 1.4Ghz Pentium 4 or equivalent, 1Gb or more RAM. 2 Hard disks. Attached to Uninterrupted power supply (UPS) unit with software to shut down server if battery power is about to run out.

If you have an older operating system, please contact us for an old version of mSupply that runs on Windows 98 or later.

### Macintosh

- Mac OS X 10.5 or later.
- 50Mb hard disk space.
- 1024 x 768 or better screen resolution.

### Backup system

Once you start using mSupply, it is of crucial importance that you have a method of backing up your data. mSupply stores all its data in a couple of files that rapidly become large if you are entering a lot of data. You need, therefore, to have a high capacity removable storage device for off-site backups. We strongly recommend the use of an external hard disk using either firewire (IEEE 1394) or

USB2 to facilitate off-site storage of backups.

You need to be able to store backed up data off-site to prevent the risk of loss by fire, theft, etc.

For servers we recommend the use of RAID 5 and mSupply's automated internet backup system.

Note! Sustainable Solutions will not be able to help you if you have hardware failures and you do not have a backup.

## Hardware recommendations:

- A connected printer is not absolutely necessary in every situation, but for most situations it is a requirement.
- Buy hardware for which you are able to obtain good support.
- Buy brands with a reputation for quality (even if it means buying a slower/older machine).
- We have clients running mSupply on a wide range of hardware. We are happy to discuss hardware options further via email or phone.

# Single user setup

## Upgrading from previous versions

If you open a data file that was created with a previous version, it will automatically be updated to the new format. Please note that this process may take some time.

**IMPORTANT!** *Always make a backup of your data file before upgrading.* We will not be able to help you in the event of some unexpected disaster if you haven't followed this advice.

## Single user Installation

For client/server installation instructions, please contact Sustainable Solutions.

We are assuming you have obtained mSupply either via the Internet.

If you have downloaded the file you need, and you have saved it to your desktop, it is important that you saved the file with an ".exe" extension or it will not run (You can rename a file by right-clicking on it). The default name for the file is "mSupply\_installer.exe"

It is strongly recommended that users who are not familiar with program installation adhere to these directions.

- Double-click "mSupply\_installer.exe", and it will automatically run the mSupply installer.
- The installer will do the following:
  - Create a folder on your chosen drive called "mSupply"
  - Create in the mSupply folder a sub folder called "example folder" containing an example data file. You can use this data file for practice. (Or use the tutorial at the start of the manual to learn the basics quickly)
  - Install the "mSupply.exe" application and associated files. Double-clicking this file will do the same as double-clicking the "start mSupply" icon on your desktop.
  - Install "mSupply manual....pdf" -this document.
  - Create two shortcuts on your desktop: "start mSupply" and "mSupply user guide.pdf"
  - Create a "mSupply folder" entry in the "programs" section of your "start" menu.

Now you are ready to begin!

## Example Data file

The mSupply installer treats example data files in a special way. Re-installing mSupply on a previous installation will replace all the files except the example data file. This is to prevent valuable data from being deleted as users may have started entering actual stock into the example data file.

To install a fresh copy of the example data file on windows you can carry out one of the options mentioned below :

- Uninstall mSupply using the Windows menu *Start > Program Files > mSupply > Uninstall mSupply* . This will remove all installed files of mSupply which includes the example data files. Re-installing mSupply now will install a fresh copy of the example data file.
- You can manually delete the example data file and re-install mSupply. The mSupply installer will install a fresh copy of the example database as the previous file does not exist.

On Macintosh machines, simply replace the example folder from the mSupply installer image.

## Notes for Windows users

- In the *regional settings* in control panel, make sure the short date format is set to display only 2 digits for the year (YY, not YYYY). mSupply lists are set up to allow only enough space for 2 digits. Having the wrong setting here will only affect display, not the actual data. It does *not* matter if you use DD/MM/YY or MM/DD/YY or YY/MM/DD
- If the display of lists in mSupply overlaps the separator lines, turn off *large font* in the *display* control panel.

## Starting mSupply for the first time

To start mSupply, either

- double-click the *start mSupply icon* on your desktop, or

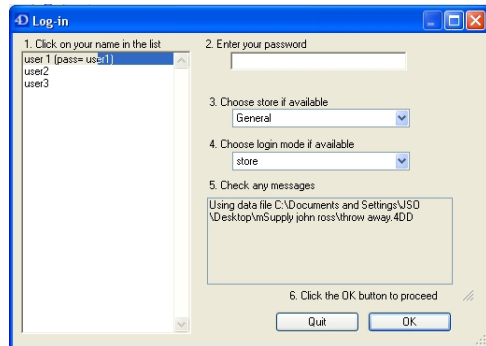
- choose the *Start > Programs > mSupply* (on Windows). If this is the first time mSupply has been started after installation, then an example data file will be opened allowing you to follow the mSupply tutorial. mSupply will present you with a log in window.

Single-user systems: Note that mSupply will “remember” the last data file used, and automatically present the log-in window for that file unless you move or rename your data file. If you do this, mSupply will show you a standard open/save window for you to choose the new name/location of your data.

### Single user: Creating a new data file

If you would like to create a new data file now, then log in to the example data file and from the mSupply menu do the following.

- *File > New Data File...* Navigate to a convenient location. Assign a name to your data file and click the save button. mSupply will now start creating a new data file.
- You will be presented with a login window. See next page for instructions

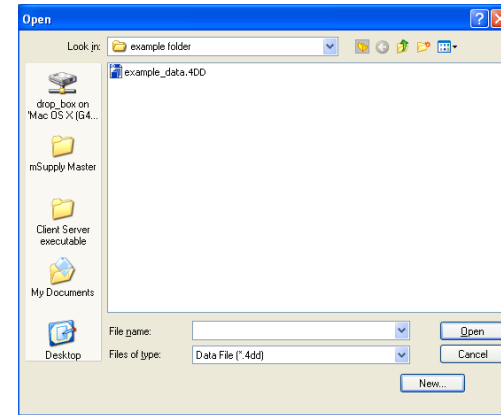


- Start entering your data.

### Alternative method for creating a new date file

Here is an another way to create a new data file.

- Quit mSupply if it is running.
- Start mSupply and then immediately hold down the “alt” key (You will now be shown the window to choose a data file. This window has a “New” button allowing you to create a new data file if you wish.



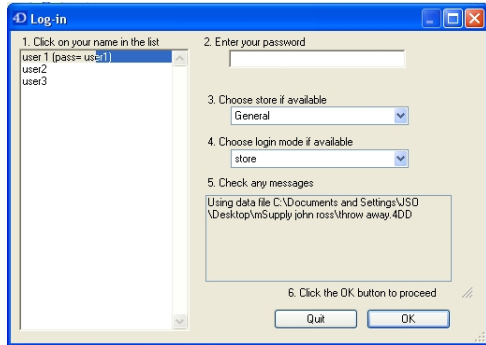
- Click on the “New” button in the bottom right coner of the window. Another window will open where you can choose the location and name of your new data.

Once mSupply has opened up a particular data file, that file becomes the default file which is opened automatically on restarting mSupply. To use a different file, it must be chosen, as described later. If the default data file is renamed or moved to a different location, it must be opened using its new name or location.

# Starting to use mSupply-HIS

## Log-in to mSupply-HIS

Double-click the mSupply (or mSupply Client) icon on your desktop. The first time you use mSupply, you will be presented with the log-in window like this:



### User name

You should select your name from the list

### Password

Enter your password

### Store/Mode

We will assume you only have access to the HIS module, in which case when you clicked on your name, the correct store/mode will have been chosen for you.

Now, click "OK" to login



## 13

Fill in the bed number (or name).

If your wards have rooms, you can enter the room number or name. This is optional.

Choose the ward the bed is in from the drop-down list.

Click OK to save and close the window.

## Modifying wards and beds.

To modify a ward or bed, show the list from the Special menu, then double-click on the entry you wish to modify.

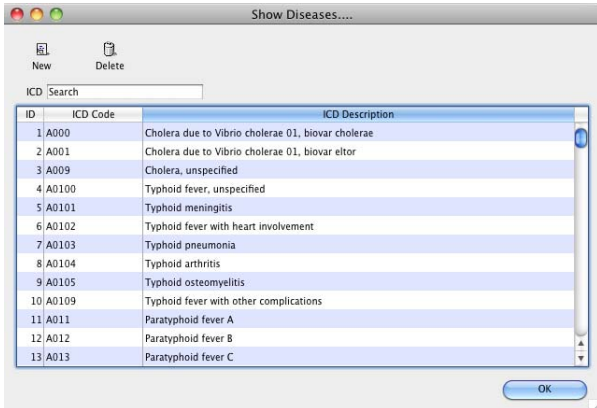
Note that if you modify a ward or bed, all historical records will be updated. Therefor, don't change the name of a ward to a totally different name, and don't move a bed to a different ward.

## ICD10 Disease codes

See the File menu chapter for instructions on importing a  
An ICD10 disease list is available on the mSupply web site.

### Show ICD10 codes

On choosing Special > Show ICD10 codes you will be shown the current disease list.

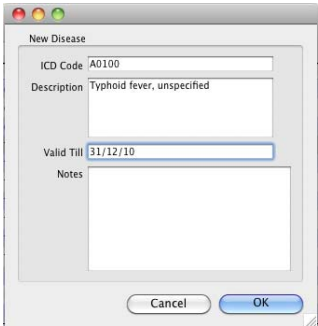


### Find

To search for a particular code, type as much of the code or description as you know, and matching entries will be shown. For example, typing "foot" will show all entries that have "foot" in their code (not that many, we imagine!) or their description.

To Add a new entry, click the *New* button.

To Modify or view an entry's details, double-click the row.



### Valid until...

This field allows you to use a code up until a certain date.

After that date is reached, you can't assign that code to any new encounters.

Note that you can use this field to disable use of a code at any time by entering yesterday's date and saving the record.

## Setting up user access

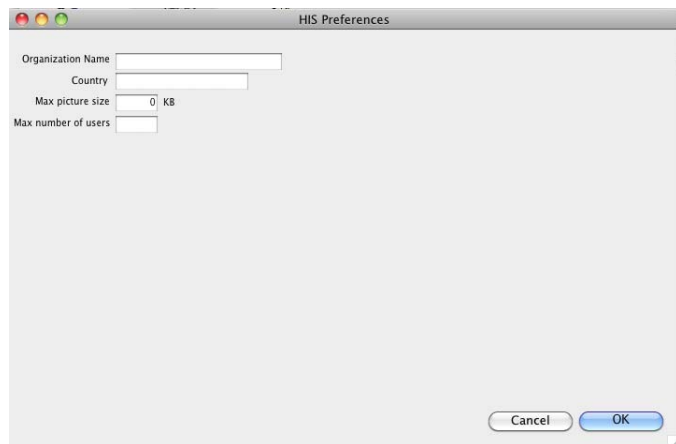
Y



# Preferences...

Choosing the Preferences menu item from the file menu opens a window with a side bar. Clicking on a subject in the side bar shows the options for that subject:

## General

The screenshot shows a window titled "HIS Preferences". On the left side, there is a sidebar with four items: "Organization Name", "Country", "Max picture size", and "Max number of users". The "Organization Name" item is selected, and its corresponding text input field is active. Below it, the "Country" item is also visible with its input field. The "Max picture size" item shows a value of "0" followed by "KB". The "Max number of users" item has an empty input field. At the bottom right of the window, there are two buttons: "Cancel" and "OK".

### Organisation name

Enter the hospital name here.

### Country

Enter the country you are located in.

### Max picture size

Enter the maximum size of patient pictures that can be inserted. We suggest you set this value to 500KB.

### Maximum number of users.

Enter the maximum number of users that can log into the HIS system at one time. For example, if you purchase a 10 user license, and assign 6 users to the HIS system, it will allow 4 users to log in to the pharmacy (mSupply) module.

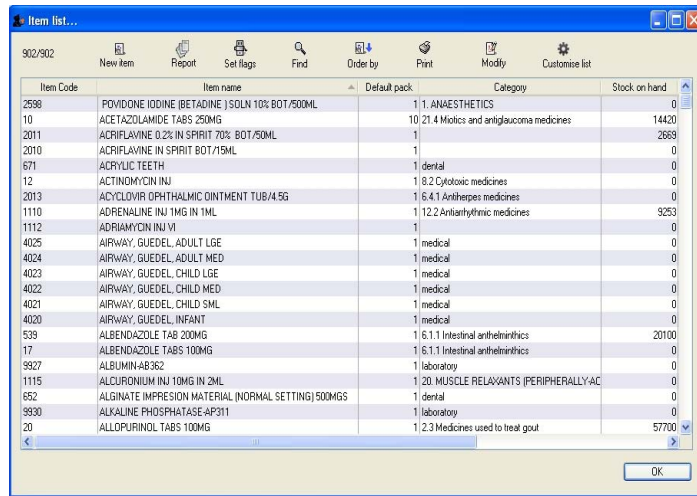


# Working with lists

Whenever you perform a search in mSupply resulting in more than one item being found, you will be presented with a list of records (be they items, names, contacts or another list) that matches the criteria you entered.

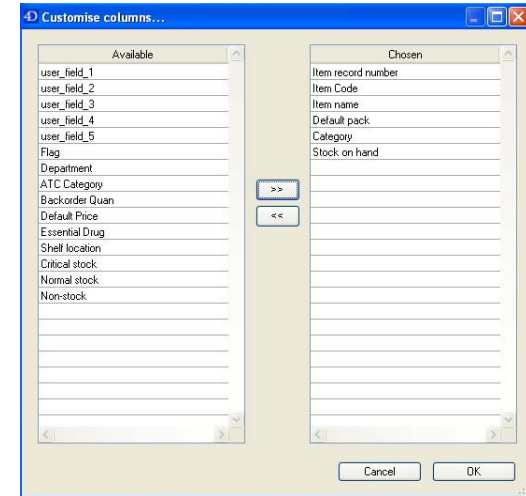
mSupply uses two types of list display. Shorter lists, such as those you see when you view an invoice, or view the stock for an item employ a list with a striped background. These lists have resizable and moveable columns, and have an indicator to show the sorted column. Their use is discussed in the next chapter. In this chapter we are concerned with tools for handling lists of names and items and transactions, which run into hundreds of thousands or millions of records.

When these lists are displayed, a series of buttons are present along the top of the window, as shown:



## Customising the columns viewed

Clicking the *Customise list* button in the toolbar will display this window:



On the right is a list of columns you are currently using.

On the left is a list of available columns. To add a column to the view, click on the item in the left-hand list, then click the right-pointing button in between the lists. You can control-click to add multiple columns at the same time.

To remove a column select the column(s) to remove from the right-hand list, and click the left-pointing button to move the columns back to the available list. You can not remove the first column in chosen list, as it is a hidden key column to identify each row uniquely.

## Renaming columns

By clicking twice on a field name in the right hand list you can change the column title.

## Column widths

The easiest way to set column widths is to drag the dividers between the columns in the list view.

Note that if the total column width is too wide for the window, a horizontal

scroll bar is added to the list allowing you to view columns to the right of those displayed.

### Choosing the column order

To change the sequence of the columns in a list, drag a column header to a new location. This is done when viewing the *Item list* window, not in the *Customise columns* window.

### Viewing or editing a particular record

To view or edit a record, double-click the row in the list you wish to view. A new window will open showing the details of the record you clicked.

### Ordering (Sorting) lists

Ordering a list is the same as sorting it. Frequently a column may be ordered by clicking on the column heading. The column will be sorted in ascending order.

*Ascending* means:

- A > Z (upper and lowercase are not considered different)
- 1 > 2 > 3 for numbers
- earlier dates to later dates

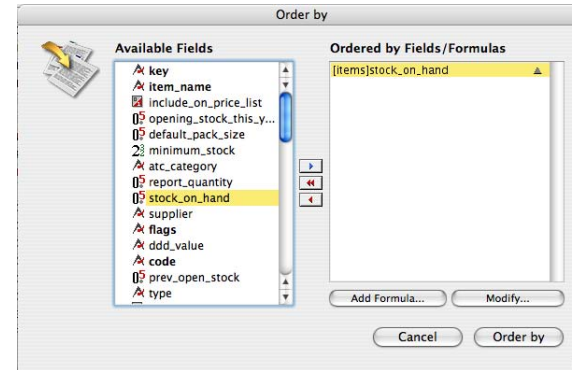
*Descending* means the opposite of *Ascending*.

Note that ordering a list does not add or remove any records from the list. It simply changes the order in which the records are displayed.

Should you require two (or more) sort parameters, clicking the *Order by* button shows the *Order by* window:



The *Available Fields* list will reflect the type of records you are viewing. The list shown is for *Items*. To order by a particular field, double-click it in the left-hand list; double-clicking on the "stock\_on\_hand" field results in this window:



(You can also drag fields to the right, or click the right-pointing arrow after highlighting the field on the left)

You can order by multiple fields by adding further fields to the right-hand list.

### To change to ascending/descending ordering

Each item in the "Ordered by Fields" list has a small triangle to the right. If pointing up, the ordering will be ascending. If pointing down, descending.

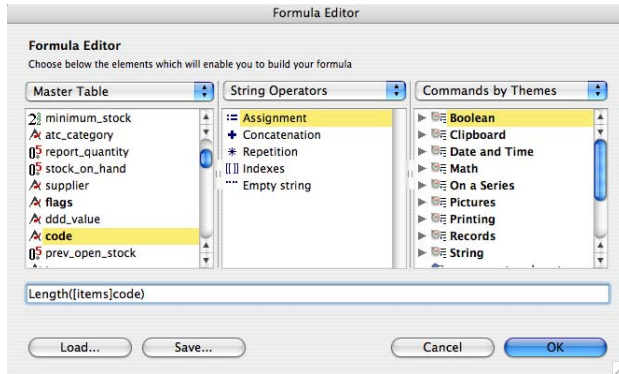
To change the direction, click on the triangle.

### To remove a field

Highlight the field in the right-hand column, then click the red single left-pointing arrow between the two lists. The double left-pointing arrow will clear the "Ordered by Fields" list

### Using formulae

If you want to order by a formula, click the *Add formula* button. Here the formula window is shown, and the formula "Length([items]code)" has been entered.



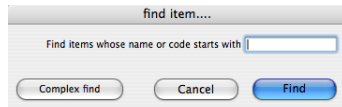
Using this formula would allow you to identify items whose item code is shorter/ longer than your organisation's specifications.  
Click the OK button to close the window.

Once the details are entered, click the *Order by* button to order the list.

## Finding records

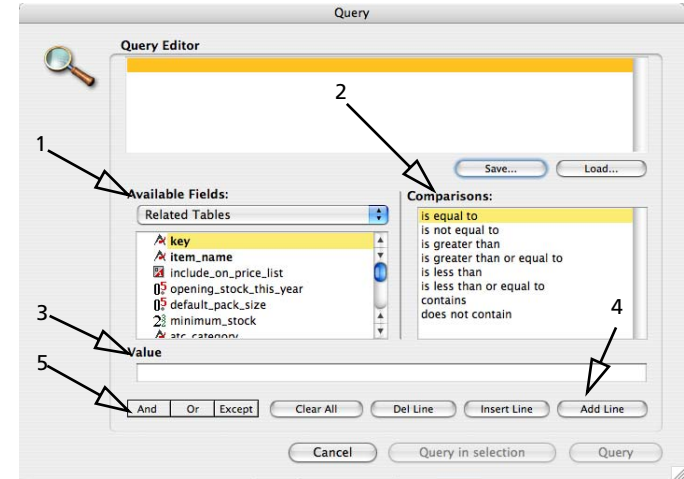
In the item list shown above there is a *Find* button.

This button shows a simple find window where you can enter the start of the item name or code.



### Complex finds

The window shown above has a *Complex find* button. This allows you to perform a search using multiple criteria. Clicking this button shows the query editor



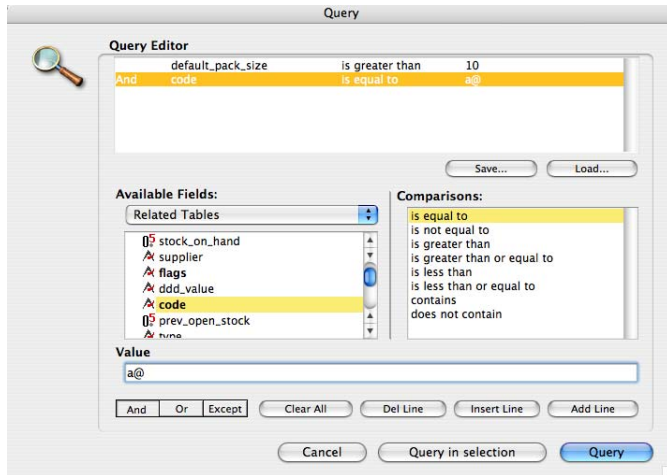
Within this window there are four areas from which you have to choose or set a value for each line of a query.

1. Available fields, from where you make your selection
2. Operands, from where you select the one appropriate
3. Value, where you enter your specific criterion
4. For queries with more than one criterion, click *Add line*, then ....
5. .... click the appropriate conjunction.

For example, if you want to find all items whose default pack size is greater than ten and whose code starts with "A" these are the required steps

1. Click on "default\_pack\_size" in the available fields list.
2. Click on "is greater than" in the Comparisons list
3. Enter "10" (no quotes) in the value field.
4. Click the *Add line* button
5. Scroll down the available fields lists then click on "code" in the available fields list.
6. Click on "is equal to" in the Comparisons list
7. Enter "a@" (no quotes) in the value field.
8. Click the *Query* button to perform the query.

Before step 8, the window would look like this



The upper area of the query editor shows a summary of the query that is about to be performed.

Note that the wildcard character "@" has been used following "a" to find all items whose code has "a" as the first character

This example will return a list of items where both the search criteria are met, because the conjunction *And* was used. If you wanted to find items that matched only one of the criteria entered, you would click on the second line in the large upper panel to select it, and then click on the *Or* button where the conjunctions are displayed.

### Saving and Using saved queries

If you have spent time on developing a particular query, and you are likely to use the same query in the future, click the *Save* button. You will be asked to choose a name and location to save the query. The saved file is very small.

When a blank query window is first shown, you can re-use a previously saved query by clicking the *Load...* button and locating the query file.

# Patients: using, adding and editing

## Adding a new name.

Choose *Patient > New Patient*, or click the New Patient button on the names list toolbar.

Most of the fields are self-explanatory..

Note that the following fields are compulsory:

- First & Last name
- Address 1
- Date of birth.

## Next of kin

Here you can link a patient to another existing patient.

Type the Last name then a comma, then the first name (or part thereof), and press *tab*. A list of matching names will be shown. Double-click on a name to select that person.

## Patient picture

You can add a patient picture by clicking the *Add* button.

## Showing and modifying patients

Choose *Patient > Show names*

To edit or view a patient's details, double-click on their name in the list.

## Finding patients

Click the Find button, and a small window is shown:

Type as much of the Last name, First name or Code as you know, and matching patients will be shown.

Note that you can search all patients or only in the already displayed list (the selection).

[illegible]



The second tab shows the disease records entered for this encounter.

[illegible]

Clicking the *Add Encounter Disease* button will show this window

Add an Encounter Disease....

ICD typh

ICD Code	ICD Description
A0100	Typhoid fever, unspecified
A0102	Typhoid fever with heart involvement
A0103	Typhoid pneumonia
A0104	Typhoid arthritis
A0109	Typhoid fever with other complications
A0111	Paratyphoid fever A
A0112	Paratyphoid fever B

Diagnosis: A0105: Typhoid osteomyelitis

Rank: Primary

Notes

Diagnosed by Smith, David

Cancel OK

The cursor will be in the ICD field, and you can type as much of the code or name as you know to find matching records.

Double-click the record you wish to use in the list.

Choose from primary/secondary/tertiary for disease rank.

Enter any notes you wish to record.

You can enter the name of a clinician who diagnosed the condition if you want to.. To do so, enter the start of the name and press <tab>... a list of matching clinicians is shown.

Choose a prescriber

New Merge

Last name	First name	Category
Smith	C	
Smith	David	

Double-Click an item in the list or select a //

Cancel OK

Double-click on the clinician you wish to choose.

If you want to add a new clinician, click the *New* button. A window to enter the clinician's details is shown:

**Add prescriber**

Active ☒ Inactive

Code

Last name

First name

Initials

Registration code

Category

Address 1

Address 2

Phone

Mobile

email

☐ Female ☒ Male

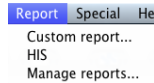
Enter details and click *OK*.

Once you have entered the disease details, click **OK** to close the list of diseases for the current encounter.

You can now click the Add encounter disease button again to add another disease, or double-click an entry to edit it.



# Report Menu



Alternatively, many reports are available from the *Reports* page of the Navigator, as shown below:

## Report printing options...

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



This window allows you to set various options:

### Report destinations

#### Printer

On selection of this option, the print window will be displayed. 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 MS Excel, provided MS Excel is installed on your computer; this feature also opens the report as a spreadsheet in Staroffice/Openoffice. [We've included special code to make sure they open using the "Calc" module of these applications.]

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.

The first time you use this option, mSupply may ask you for the location of your spreadsheet program, which it will then store for future reference.

The location can also be set by choosing File > Preferences and clicking on the "This Computer" tab.

#### 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

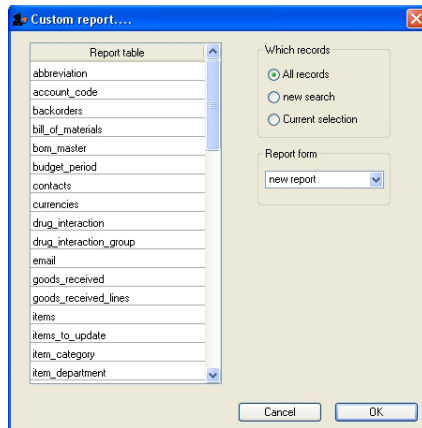
You can choose what information will be displayed at the top and bottom of each page. The default report heading is set according to the report you are printing. By default, the date will print on the left and the page number on the top right of each page.

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.

## Custom Report...



The custom report window is displayed and this allows you to create a report according to your own requirements using the quick report editor; once created you may save the form of the report in the *custom reports* folder for future use. The window requires you to make three choices:

### Report table

A list of tables on the left to choose which table (which type of records) you want to report on, e.g. Names, Items, etc.

As of version 1.6 there are two options for transaction lines. The "Transaction lines (Transaction query)" option allows you to search much faster on a large number of transaction lines. For example, if you are wanting to get the quantity of each item given to customers in a specific month, you would use this option.

### Which records

A series of radio buttons to choose which records to examine

- All records

- New search (query), if you want to report on records meeting specific criteria. If chosen, you will be presented with the Query (search) editor, where you can build search statements to your heart's content! A short description of using the query editor is given below, and two example searches are later described. For a more comprehensive description, a range of books is available either in electronic or hard copy versions. Please email [info@msupply.org.nz](mailto:info@msupply.org.nz) for more information.
- The "Current selection" is the group of records that were last displayed. For example, you can use the Item I View or edit item command quickly to find all items starting with "a". When you click the OK button, the items in the list are the "current selection". If you are not sure which records represent the current selection, you should click the "new search" radio button.

### Report form

- New report
  - After clicking the OK button you will be presented with the report editor where you can design a report. The report editor is somewhat complex, but time spent in learning how to use it is time well spent. It is a powerful and invaluable feature. A brief introduction together with designing two simple reports are given in Designing a Report below, and more details are available in training courses on using mSupply, and in publications available from Sustainable Solutions.
  - If you want to save a report or search (query), you can save them on your hard disk, and retrieve them next time you run the report.
  - If you save the report you have created in the Custom reports folder it will show up in the report form drop-down menu on future occasions when you choose custom report
  - Note: Do not save any reports in the reports folder - these reports are reserved for special use, and modifying them could create problems!
- New label layout
  - presents you with the label editor, where you can design and save label layouts. These are useful for use with names for addressing envelopes, and with items for making tags for labeling shelves in your warehouse.
  - If you choose this option the "Order by" window will appear after a query. This allows you to sort the records into a particular order before printing labels. (In a nutshell: Drag fields from the list on the left to the list on the right to use them for sorting)
  - other items in the menu

- if you have saved any reports in the custom reports folder which is in the same folder as the mSupply application, they will be listed here.

For a list of the fields in each table, and what each field contains, see the *Field Descriptions* chapter in this manual.

### Using previously saved layouts

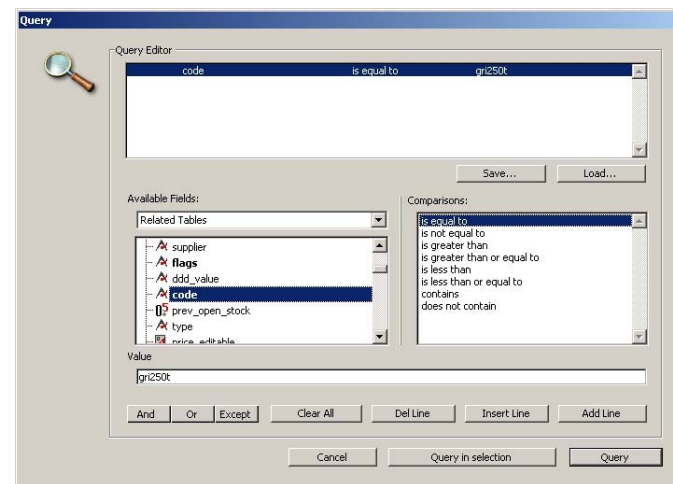
Any report layouts which you have used previously, and saved, may be accessed by clicking on *File > Open* on the menu bar, and selecting the required layout.

### Available methods

Method	Description	Parameters
date_day_number_to_text		
qr_account_code_return		
qr_flag_value_change		
qr_get_currency		
qr_get_location-from_key		
qr_get_loc_from_key_new_process		
qr_get_Name_code_from_key		
qr_get_stockOnHand_from_itemKey		
qr_get_store_name		
qr_keep_accumulative_value		
qr_ns_customer		
qr_responsible_officer		
qr_ship_method		

### Using the Query Search editor

The query editor can be a bit daunting, but is also very powerful and once you are familiar with its capabilities, your competence to access the precise information you may require from within the mSupply database will significantly increase. Two examples will later be described, but here we look at a query about to be performed on the items table:



When you open the Custom Report editor, it is ready to take input values for a simple single line query. Each line of a query needs 4 items of information:

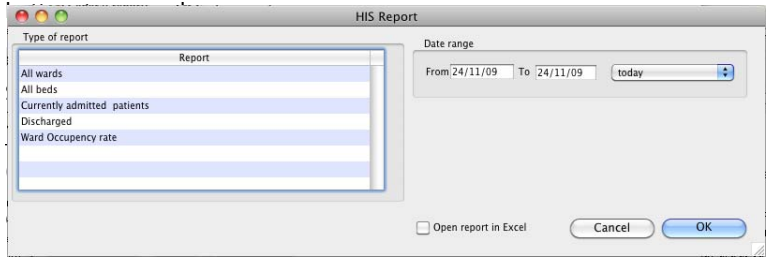
- The field to query. Choose this by clicking on the field in the middle-left list of fields. Just above the list of fields is a drop-down list that allows you to also choose fields from related tables. If you want to perform related queries, you need to know a little about the internal structure of mSupply data. Please contact us if you would like a diagram of the table layouts. A simple example of a related table is that each transaction line is related to a transaction (many to one relationship). The means that you can use the information stored in the transactions table (eg invoice date, number, status, etc.) to query transaction lines.
- The Comparator. Choose the comparator from the list of fields under "Comparisons" on the right by clicking on the comparator you wish to use.
- The Query value. Is entered in the bottom area (above the buttons). In the example above, the field chosen is an alphanumeric field (the item code), so an entry area is displayed where you can enter text or a numeric value - in this instance the item code "gri250t" has been entered. Note that you can also use the "@" symbol as a wildcard in your query value to perform "contains" queries.

- The Conjunction. This does not apply to the first line of a query, but the second and any further lines need to start with a conjunction. Set the conjunction for the selected line by clicking the appropriate button in the bottom-left area of the window ("And", "Or" or "Except")

To add lines to a query, click the "Add Line" button.

If you have spent time creating a complex query that you might wish to use on future occasions, you can save it to your hard disk and select it again using the "save" and "load" buttons in the window.

Once your completed query is entered, click the "Query" or "Query selection"



**All wards**

Prints a list of Wards.

**All beds**

Prints a list of beds

**Currently admitted patients**

Prints a list of patients who have not yet been discharged, along with their ward and bed and expected discharge date.

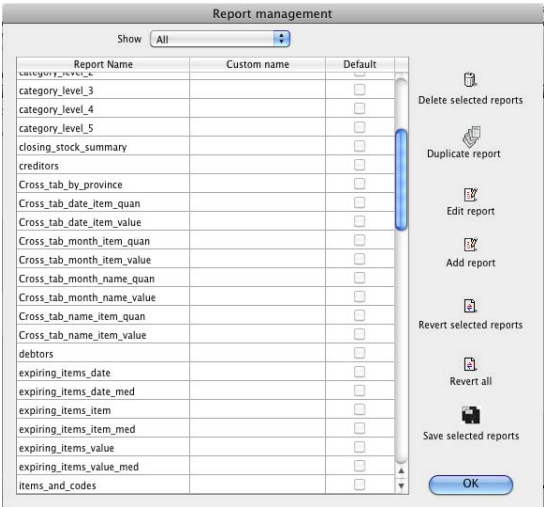
**Discharged patients**

Prints a list of discharged patients for the date range specified.

**Ward occupancy rate**

Print the occupancy rate for each ward for the period specified.

**Manage Reports**



The report management window allows you to customise the built-in reports available in mSupply, and to create multiple versions with different display formats that are available when the report is run.

For a description of the report management process, see the mSupply user guide.



















# File menu...

---

## New data file...

This command only applies to single-user operation

This command will present you with a standard open/save window where you can choose the name and location of a new data file:

If you click the **OK** button, mSupply will close the data file currently in use (saving any changes made automatically), and then open the new data file.

The new data file will contain no names or transactions. You can either enter these manually or use the import commands (see later in this chapter) to import names, .

## Open data file...

This command only applies to single-user operation

This command will present you with a standard open/save window where you can select an existing data file to open.

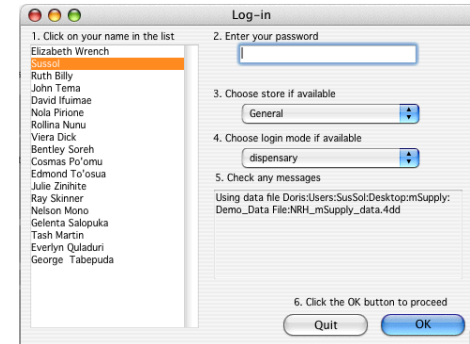
If you click the **OK** button after successfully selecting a valid mSupply data file, mSupply-HIS will close the data file currently in use (saving any changes made automatically), and then open the new data file.

Note that if you regularly use more than one data file, use the "About mSupply..." Command from the help menu (mSupply menu on Macintosh), where the data file currently in use is displayed.

**Warning::** Do not try to open the same data file from 2 or more single user copies of mSupply at the same time. You will corrupt your data. If you require multi-user access, buy a multi-user licence!

## Change user

This menu item allows you to change to a different user without quitting mSupply.



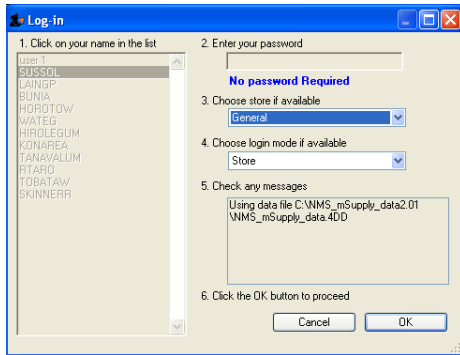
If more than one user is sharing your computer, choose this item before you leave the computer so that the next user will have to log in with their user name & password before gaining access.

Clicking the **Quit** button gives you the option of quitting mSupply or re-entering your user name and password. This stops a new user canceling the window and continuing to use mSupply under your login details.

## Switch ....

This menu item lets a user whose permissions allow switch stores and/or login mode without the need to re-enter their password. Note that this screen does not allow a change of user; pressing **Cancel** reverts to the current store/login mode, so caution in using this feature should be exercised, and this screen should not be displayed when the computer is left unattended.





## Change Password

You can change your password using this command. You must know your old password to do this.



You are required to enter the new password twice to ensure you have typed it correctly.

Note: passwords are case sensitive- make sure you don't have *Caps Lock* on. If you forget your password you must ask the user who is either first or second in the password list to change your password for you.

## Edit users and groups...

For further information see *Restricting User Access* on page 113.

## Show current user...

A small window appears to show the current user (in case you've forgotten your name!). Actually, it is important to ensure that you do not start to use a computer where someone else is already logged in to mSupply, or else your work (and mistakes!) will be attributed to the person who was logged in.



## Backup.....

This function allows a backup of your datafile to be made to the specified location in your computer. The backup path can be set from File > Preferences. You can perform a backup manually as well as automatically. It is not necessary to quit the database before performing a backup.

"Backup" function works both in single user as well as multi-user mode. Under multi-user mode, this command performs a backup of the server data. A progress window will show how the backup is proceeding.

Note:- In multi-user mode, you can't run "Backup" and "Restore" function from the client. This should always be run from the server computer.

## Restore...

Choosing this item allows you to choose a backup data file, uncompress it and start using it as your main data file.

In client/server usage this command will have no effect.

Be very careful about restoring. We suggest you consult Sustainable Solutions before attempting a restore.

---

## Import ICD10 codes...

If you have a tab-delimited text file with 2 columns, you can import codes using this command.

Column number	Column letter	Field	Description
1	A	ICD10 code	8 alphanumeric characters (must be a unique value)
2	B	disease description	30 alphanumeric characters

A sample ICD-10 file with 65000 codes is available on the mSupply web site.

---

## Preferences

See the preferences chapter for more information.

---

## Exit/Quit

This command will exit mSupply-HIS.

There is no need to save your work. mSupply does this automatically.

## The Edit Menu

---

The commands in the Edit Menu can be used when you are entering text, just the same as in a word processor.

Undo: The previous contents can be retrieved if the document has not been saved.

Cut: Deletes the currently selected text and places it on the clipboard

Copy: Copies the currently selected text and places it on the clipboard

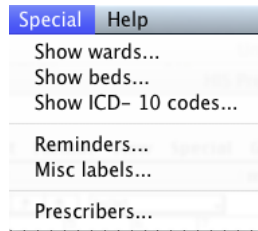
Paste: Replaces the selected text (if there is any) with the contents of the clipboard. If there is no selected text, the clipboard contents are inserted at the insertion point (the blinking cursor)

Clear: Clears the text in the particular field.

If the copy/cut/paste items are dimmed out, it is because you are not currently in a text entry field.

# The Special menu

---



---

## Show Navigator

If for any reason the mSupply Navigator is not visible, choose this option to show it again.

set the width and height of the labels you are using in millimetres.

Do you are finished editing currencies.

---

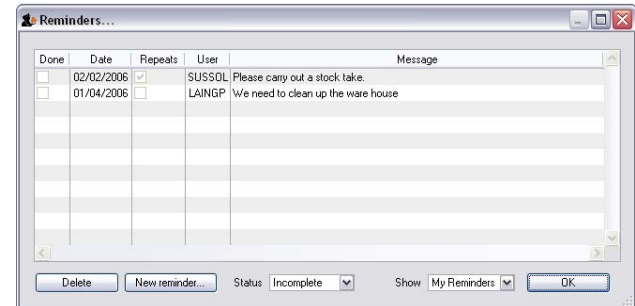
## Wards, Beds, Diseases

See the chapter on setting up mSupply-HIS for info on these items.

---

## Reminders...

The Reminders command shows reminders that are not yet completed.



To add a new reminder, click the *New reminder...* button at the bottom of the list.

To edit a reminder, double-click it in the list.

To delete a reminder, click on the reminder to delete, then click the *Delete* button.

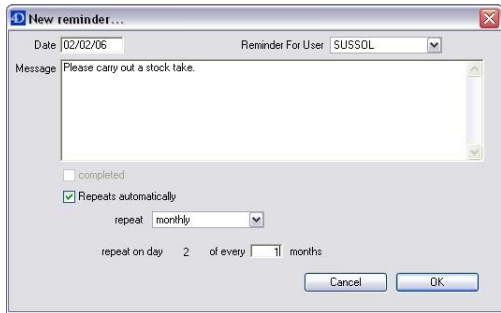
You can sort the list by clicking on the column headers. Click a second time to sort in the opposite direction.

### Filtering the list

You can change the reminders displayed according to the status and whether the reminder is for you to complete or was created by you.

To show only complete or in-complete reminders, choose from the status dropdown list.

## The Reminder details window

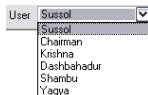


### Date

The due date of the task

### Reminder for User

By default you create reminders for yourself, but you can also create them for other users. If you're the micro-managing type, you could put everyone else's work plans in for each day or week!



### Note

The text of the reminder message

### Completed

Check this box if the reminder is completed (but note that it won't usually show in the list once it is checked)

### Repeats automatically

Once this box is checked, you will be shown options for the reminder to repeat daily, weekly or monthly.

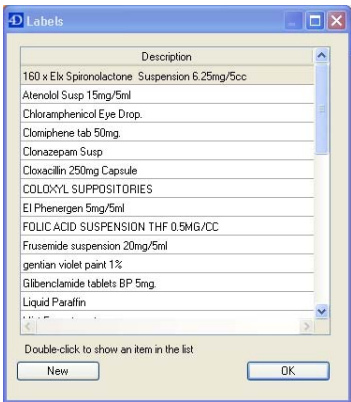
particular store from this window; its purposes are these:-

- to create a store
- to display the created stores
- to edit or delete a store

Note that deletion of a store being possible only when that store contains zero stock and there have been no transactions recorded.

## Misc labels

Choosing this item shows a list of previously saved label formats.



Double-click an item in the list to edit/print that format, or click the New button to add a new format. The format details window looks like this:



### Label name

This field will not print on the label- it is for you to identify the label. It is shown

in the list of available formats when the Misc labels menu item is chosen.

### Heading, Body, Footers

These fields will print on the label in roughly the position that they are on the screen. Note that if you enter a very long left and right footer they may overlap in the middle of the label. Print a single test label to check first.

The labels are designed to print to plain 90mm x 40mm (w x h) labels from a Zebra label printer. Please contact us if you require support of other printers and other label formats.

### Print button

Clicking this button will print the number of labels specified in the *quantity to print* field to your label printer. If the print preview button is checked, you will be shown an on-screen preview of the label. Note that if you enter a large quantity and check the preview option, you will be shown a preview of each label!

### Cancel button

Clicking Cancel will close the window without saving any changes you have made

### Delete button

Clicking this button will delete the currently displayed format and return you to the list of available formats.

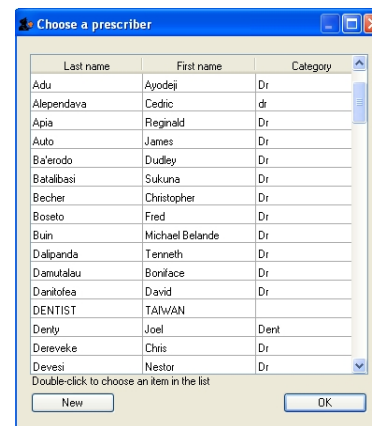
### OK button

Clicking OK will save any changes you have made and close the window. (Note that the quantity to print is not saved- it is reset to 1 each time you open the window).

## Clinicians...

We were going to title this section "Managing Prescribers" but we all know that's not possible ;-)

When you are in dispensary mode, issuing items to a patient allows you to add a prescriber. This menu item allows you to set up your list of prescribers.



To add a new prescriber, click the "New" button.

Status: ☒ Active ☐ Inactive

Code:

Last name:  First name:  Initials:

Registration code:  Type:

Address 1:  Address 2:

Phone:  Mobile:  Email:

☐ Female ☒ Male

9

Add a code for the prescriber. You can use the code quickly to look up the prescriber when dispensing.

Other fields are fairly self-explanatory. Note that the code, first name and last name can all be used for looking up prescribers when dispensing.

### Initials

The text you put in the "Initials" field will print on dispensary labels.

### Active status

If you have a prescriber that is no longer used, you can change their status to "inactive" and the prescriber will not show in the choice list when dispensing. Inactive prescribers will still show when you choose Special > Show Prescribers...

We suggest you might want to add a "Miscellaneous Prescribers" item to the list,

and use this if you have a lot of prescribers whose prescriptions you only dispense infrequently.

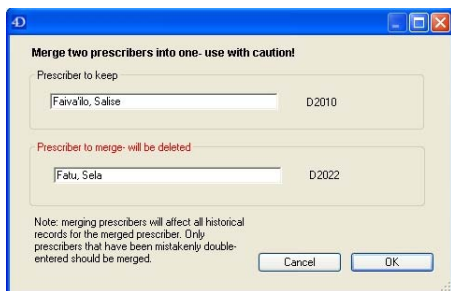
### Category

This field can be used to group prescribers together, and can then be used to filter prescribers when producing a transaction report.

---

## Merge prescribers

This menu item is used to merge two prescribers, where the same prescriber has inadvertently been entered twice. You are shown a window like this:



Enter the two prescriber names by entering the start of their surname or their code, and then pressing **Tab**. The top prescriber is the one who will be kept. The lower prescriber will be deleted.

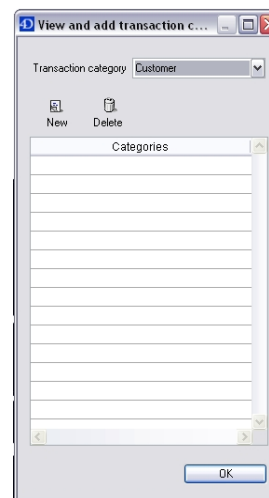
Once you have entered the two names, check the details are correct, and then click **OK**. You will be warned one last time, and then the operation will be completed.

All transactions that recorded the deleted prescriber will now show the name of the prescriber that was kept.

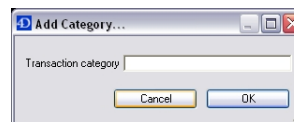
---

## Transaction categories

Categories allow you a way of grouping transactions together. Each type of transaction can have its own list of categories. For example customer invoices might have a category "normal" and "urgent". Inventory adjustments might have categories "expired", "damaged" and "stock take"



Click on "New" button to create a new category.



The categories can be added to customer, customer credit, supplier, supplier credit, repack, build, inventory adjustment while creating or editing transactions. Once you have assigned categories they will show as a drop-down list when you enter a new invoice or transaction.

(In versions of mSupply prior to v1.8 categories were set in the Preferences, and there were only categories for supplier and customer invoices).

---

## Contacts...

This command displays a window where you can edit contacts.

last	first	organization	organization phone	comment
Gupta	Sanjay	SS Enterprise (Surgicraft)	221828	
Gurung	Shaha	Burtibang CHP	-	
Gurung	Milan	SCHEER MEMORIAL HOSP	(011) 61112	
Gurung	Mrs. Sobha	Amp Pipal Hospital- Surgical	064-29180,388	
Hamlet	Neil	INF Miscellaneous	061-20111	
Hemm	Dr. Friedbert	Green Pastures Leprosy Hosp	061-20342	
Jha	DN	LAL GADH HOPITAL	521622(KTM) 041-21	Gen. Administration
Joshi	Dr. Sunil Kum	Khimti Project Consortium		
Kalle	Gopal	Nepal Safer Motherhood Proje	248110 / 248991	
Kalle	Puskar	Netherland LRA East	021-26571	
Knuthila	Dr. Jukka	Green Pastures Leprosy Hosp	061-20342	
Koirala	Hari	Green Pastures Leprosy Hosp	061-20342	
Laure	Mr. Tori			
LeMaster	Joe	UMN Miscellaneous	228118	
Lemaster	Judy	Open House Clinic(UMN)	214745	
Limbu	Captain S	BGN Headquarters, Pokhara	061-20274	
Lynch	Patrick	Nepal Leprosy Trust	521622	
MacDonagh	Sandra	Nepal Safer Motherhood Proje	248110 / 248991	
MacRorie	Dr R	TLP Proj Surkhet(INF)	083-20346	
Mahato	Radhe Shyam	National Healthcare Pvt Ltd	051-24336,22956	
Maniel	O	International Dispensary Assoc		
Martin	Becky	Team Hosp Chauhan	480792	
Matthew	Elise	INF Expatiate Clinic	061-20111	
Mawson	Ray	Tansen Hospital (UMN)		
Meys	Dr J	Netherland LRA East	021-26571	
Mishra	Pranaya	Manipal Hospital		

Contacts are usually associated with a name (a customer or supplier), and it is easier to edit such contacts using the "show suppliers..." or "show customers..." command.

If a contact is not associated with a name, you can edit details for that contact using this command.

### Buttons in the contact list window:

#### Query

Use to find the contacts you wish to report on or wish to produce a set of address labels for.

#### Report

presents the Quick report editor window. See the using the report editor chapter for more instructions.

#### Order by

sort the contacts

#### Print

clicking this button will present you with a dialog with two choices:

- If you click *list* a list will be printed of the records in the window.

- If you choose *labels*, you will be shown the label editor, allowing you to print a set of address labels for the current list of contacts. Note that you can save a particular label layout and then use the "load" command in the label editor to restore your layout.

### New

To edit a contact, double-click on the line you want to edit. You will be shown the contact details:

**edit contact**

last: Chu

first: leong-min

position: Uverseas trade II

comment:

user field: ☐ Yes

Info if related to a customer or supplier....

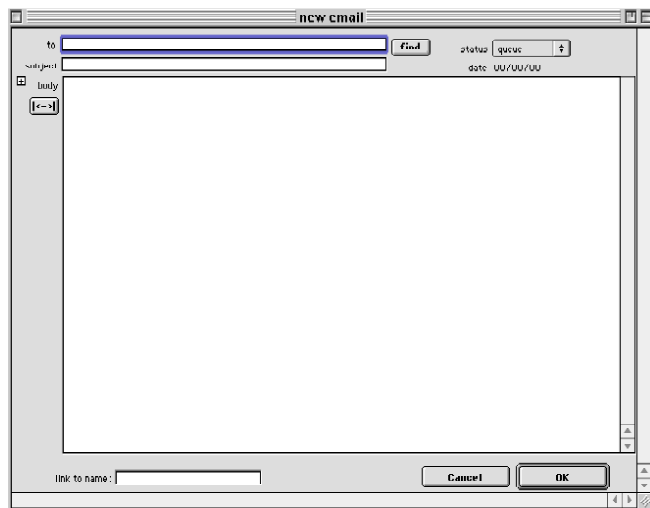
name: KOREA GREEN CROSS CORPORATION

Buttons: Delete, Cancel, OK

### New e-mail...

Choosing this command reveals this window:





The email window allows you to compose and then send an email from directly within mSupply.

The inbuilt email sending functions of *mSupply* allow you to:

- Send invoices to customers that they can print (using the "export HTML invoice" command)
- Send orders to suppliers (using either the "Email" or "Email pdf" menu item when editing an order)
- Send electronic invoices to customers that they can automatically import into their copies of mSupply.
- Send an email as you would using another email application. If you use mSupply, the advantage is that the email can be linked to the name, and easily viewed from the *Email* tab of the name details window.

### To compose an email

- Enter the recipient email address in the *to* field. If you have email addresses entered for names in mSupply, type the start of the name, and click the *find* button to automatically insert the address. To enter more than one address, separate the addresses with commas.
- Enter a subject in the subject field

- If you want to enter addresses in the "CC" or "BCC" fields, or want to attach a document to the email, then click the small "plus" icon on the left to show those fields. (See below for how to attach documents). To enter more than one address in the "CC" or "BCC" fields, separate the addresses with commas.
- Type the text of your message.
- Click the *OK* button to queue your message.
- To send your message, click the *send* button in the message list window, or choose *Send queued mail...* from the *special* menu.

### Notes:

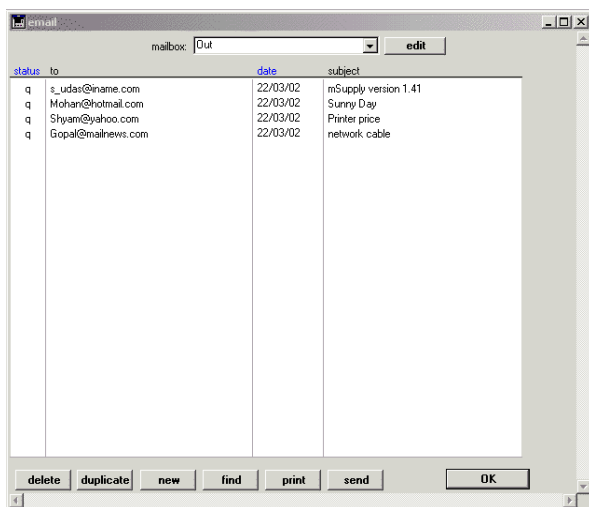
- Make sure you have set a return address and a mail server in the Preferences.
- If you are using a dial-up connection, you must close the connection when you have finished sending.

### Attachments

- *mSupply* allows you to attach documents to an email.
- To attach a document, simply click the "attach" button. You will be presented with the standard window to find a file.
- There is no limit to the number of attachments you can add to a email. (Well, actually it's a few thousand. Let us know if this isn't enough.)
- To delete an attachment, click the attachment in the list you want to delete, then click the *delete* button.

## Show e-mails...

You will be requested to enter the number of days of mail to display. The default will display all mail for the last week.



### Viewing a messages

To view a message from the list, double-click it.

To view a different mailbox, choose the name of mailbox from the list

### Status

The status of a message will be one of the following:

- S - the message has been successfully sent. Once a message has been sent you can no longer edit it. To send the same message again, use the *duplicate* button to make a copy of the e-mail.
- Q - the message is queued, and will be sent next time e-mail is sent
- H - the message is on hold, and will not be sent.

You can click on the "status" and "date" column headers to sort messages by those columns.

To view a message, double-click it, and it will open in the message composition window.

### Managing mailboxes

Click the *edit* button beside the drop-down list to show a list of mailboxes:

### Buttons in the message list window:

#### Delete

To delete a message, click on it to highlight it (control-click (Mac: command-click) to select multiple messages). You will be given a warning allowing you to change your mind!

#### Duplicate

A copy of the message you have highlighted will be made, and will open in the message composition window to allow you to edit it.

#### New

A new message will be created, and the message composition window will open, allowing you to edit it.

#### Find

The find window will open, allowing you to find messages. The results will be displayed in the list.

#### Print

The displayed list of messages will be printed.

## Send queued e-mails...

Any queued e-mailed messages will be sent. If you have a dedicated network connection, the messages will be sent straight away. If you have a dial-up connection and you are not already connected to the internet, you will be shown the "connect to..." window to initiate a connection.

Note that if it takes a long time to establish a connection, *mSupply* may give an error. If you are experiencing problems, first establish the connection to your ISP, then choose *Special* | *send queued e-mail*.

## Set start of year stock...

This command sets the start of year quantity for each item, and records the start date. The starting stock date and stock quantity are used when printing a ledger.

The idea is that you reset your starting stock on the first day of each new financial year. Then, at the end of the year, the item ledger will print the starting

value, all transactions for the year, and your ending stock quantities. Using this command does not change any stock-on-hand values or archive any transactions.

You are not required to use this command, but if you do not, you will not be able to archive transactions, and you will get very long item ledger printouts!

## Show Web messages

If you are using the mSupply web server, web messages give you a way of giving information to your clients. For example, you might want to let them know about a change in packaging, a drug recall or that you will be closed next Tuesday for stock taking.

The messages you add will be shown in the customer's web browser after they have successfully logged in.



**mSupply**

**"Simply Powerful Pharmaceutical  
Inventory Control"**

### mSupply Web Interface

Search for  

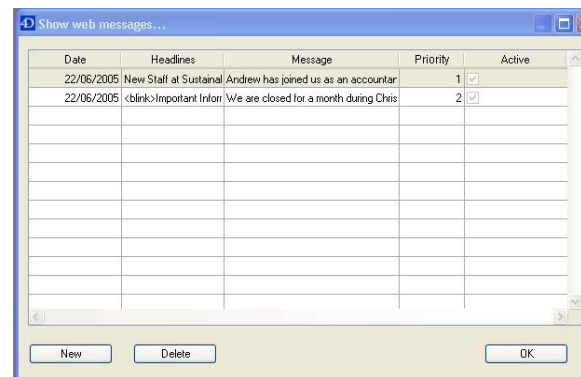
OK

News and Messages...

New Staff at Sustainable Solution. [More...](#)

Important Information for the Holiday Period [More...](#)

Choosing this menu item shows a list of messages



Double-click a message to edit it.

### Delete button

Click on a message in the list, then click this button to delete it.

Click the *New* button to add a new message. The window to add or edit a message will be shown

Only messages with the “active” radio button checked will be displayed.

### Priority

Choose a priority from one to five. Messages are sorted by priority before they are displayed, so messages with a priority of “1” will display at the top of the list.

When a customer successfully logs on, they will see the headline message only, with a “more....” link, which will display the full message text.

Note that you can put HTML tags in the message headline and body.

For example, to make a message appear in bold, write it like this:

- **<strong>Urgent request for assistance</strong>**

To make a message blink:

- **<blink>Blinking messages are very annoying</blink>**

You can also use this facility to make complex newsletters with columns and links to other web pages etc.

## View log

When you choose *view log* you will be asked how many days history to view (the default is 7 days)

This menu item can only be used by users in the “high access” group.

It displays a list of significant events, along with the date, the time and the user.

Date	Time	User	Type	Event
03/02/05	12:20	John	backup	backup successful
03/02/05	12:29	John	quote	new quote: 1008 - Supplier: 4833
03/02/05	12:29	John	quote	change preferred: bicarbK1 Neopreferred turned on
03/02/05	12:29	John	quote	new quote: 1017 - Supplier: 4833
03/02/05	16:43	John	Create item	dialhep5000 Dialysis Heparin inj 25000IU /5ml
04/02/05	09:47	John	backup	backup successful
04/02/05	13:49	John	Create item	wouclos Wound closure strip 6mmx35mm
07/02/05	10:02	John	backup	backup successful
07/02/05	11:52	John	Create item	tapeduro12 Tape Durapore Silk 12mm x 1.9m
07/02/05	11:54	John	Create item	steristrip3mm Steri-strip 3mm x 75mm
07/02/05	12:07	John	Create item	wlecbathly Battery Welch Allyn rechargeable 3.5V 72200
07/02/05	12:09	John	Create item	Cidexinstmml Instrument Disinfectant Cidex
07/02/05	12:24	John	Create item	sox16 Stump socks AK 16x3
07/02/05	12:24	John	Create item	sox15 Stump socks AK 15x2
07/02/05	12:25	John	Create item	sox14 Stump socks AK 14x3
07/02/05	12:26	John	Create item	multistix Multistix 10-SG Urinalysis Strips
07/02/05	14:50	John	Create item	propafenone Propafenone tab 50mg
07/02/05	15:16	John	Create item	china Benazeptil HCl (Ch)
07/02/05	15:16	John	Create item	china Cedilanid inj (Ch)
07/02/05	15:18	John	Create item	china Ceftriaxone inj 1g (Ch)

Buttons in the window:

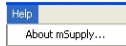
- OK- exit the window
- Order by- sort the log
- Search- find particular records in the log.
- Export- allows you to export the log for use in another application

## User's report

Choosing this menu item displays a report of the list of names of the users, their access group, active status, number of logins, last login date and last login time.

# The Help Menu

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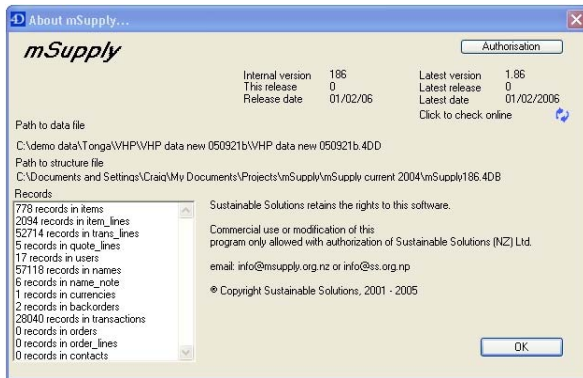


use it!

---

## About mSupply...

Choosing this item displays information about the version of mSupply in use, and provides details of the location and size of your data file.



You can click the blue arrows icon to retrieve the current version number from the internet. (This will not download a new version- it will only advise whether a newer version is available for download).

### Authorisation

The *Authorisation* button is provided largely for developers' use. Its purpose is to assist our technical staff to resolve clients' problems. It is recommended that you ignore it.

---

## Why is there no help option?

We haven't included a help file in mSupply to keep download sizes small, and because we think that this PDF help file is a thing of beauty and you ought to

# Miscellaneous Topics

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## Maintenance and Repair

If you are using your data file regularly, it is a good idea occasionally to check that no problems have developed. Problems can develop due, for example, to faulty hardware and other reasons outside our control.

### For technically competent users or professional IT staff

In the case of a serious hardware failure, the first option should always be to revert to the last known good backup of your data.

If for some reason you must repair a damaged data file, please contact Sustainable Solutions for advice.

To check your data, download a product called *4D Tools*. (4D Tools and a manual is included on the CD) from <ftp://ftp.4d.com>.

*4D Tools* can simply check your data file for errors, or repair your file. Please contact Sustainable Solutions if you believe your data file has a problem, before repairing it.

Always use *4D Tools* on a backup copy of your data first.

If *4D Tools* is unable to repair your data, Sustainable Solutions is able to use specialist tools to examine your data, and even export your data and re-import into a new data file. We have not had to do this for a customer yet, but the option is available as a near-last resort.

## How do I move a window whose title bar has been hidden?

On Windows:

- Method 1: Press Ctrl and both mouse buttons, and drag the window to the new location.
- Method 2: Press Alt-Ctrl-right mouse button, while dragging the window to the new location.






On Mac OS

- Press Control-Command-mouse button, and drag the window to the new location

## Printing notes

When printing you are usually presented with two dialog boxes (Windows). The first box is the "page setup" window. What this window looks like will depend on which printer you have chosen. The second box is the "print" window.

The "print" window has a check box that allows you to preview each page before printing. Buttons in the print preview window:

-  Print - Prints the current page
-  Stop - Stops the print preview. Useful to view a report without printing it.
-  Previous page (left arrow icon)- Move to the previous page of the print job
-  Next page - Move to the next page of the print job
-  Zoom - Magnify the view, or see the whole page (if the view is already magnified).

*Note that once you have set the print preview to "on", the "print preview" check box will remain checked until you uncheck it or you quit mSupply.*

## Security of your data

If you maintain the mSupply password system carefully, your data is fairly secure. Note, however, that if a person has access to the original copy of mSupply, they will easily be able to open the data file, as the "user 1" password is clearly shown in the password entry screen until it is overwritten the first time you click "OK". It is your responsibility to keep copies of your mSupply software and data in a safe place.

As of version 1.4, passwords stored in the data file are encrypted with strong (512 bit) RSA encryption, so there is little danger of someone finding your password.

# Technical Notes

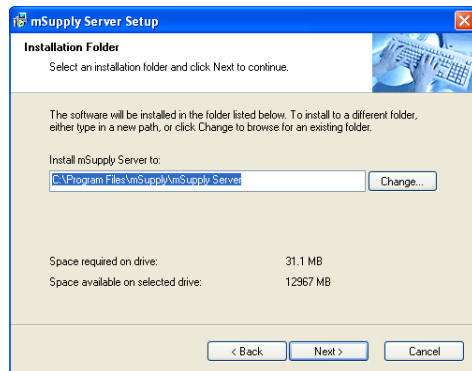
## mSupply Client/Server installation

If you are using the client/server version of mSupply you will be supplied with a CD with 2 installers. One installer, mSupply\_server\_installer.exe is used to install the server software on a single server computer. The installer mSupply\_client\_installer.exe is used to install the client software on as many computers as you wish. You will be limited in how many clients can connect at any one time by the server licence you have purchased.

To run the installers, simply insert the mSupply CD, open Windows Explorer and double-click the installer file on the CD that you wish to run.

### Installing mSupply server

#### Run the installer



#### What is installed where:

We strongly recommend you do not change the default installation directories, which are as follows:

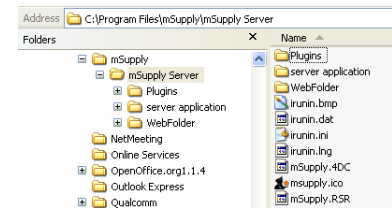
mSupply Server: c:\Program files\mSupply\mSupply Server

mSupply Client: c:\Program files\mSupply\mSupply Client

(The volume may have a name other than "C" depending on how your system is configured)

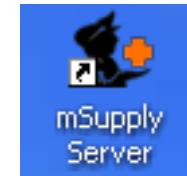
#### mSupply server installer also installs the following files and folders:

A folder called "Plugins" containing mSupply reports and plug-ins in the same folder as 4D server.exe



#### Starting the Server for the first time

The first time you start the server, double-click the "Start mSupply Server" icon on the desktop

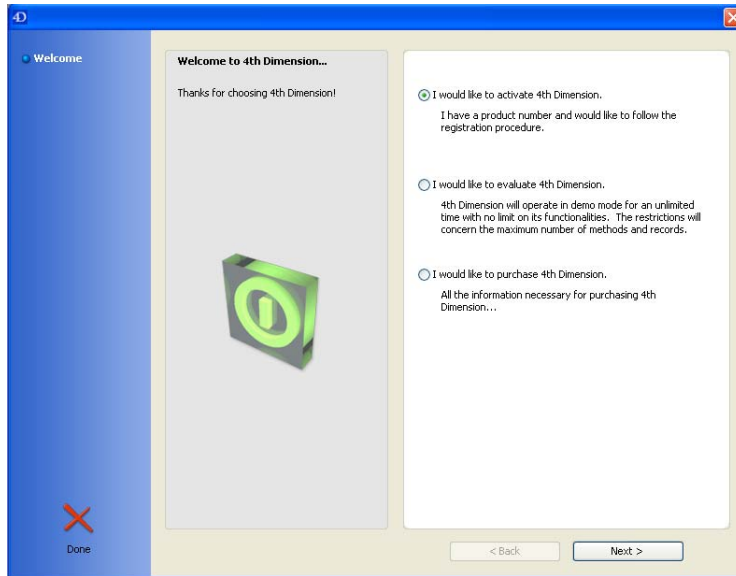


You can also start the server by choosing Start > mSupply Server > mSupply Server

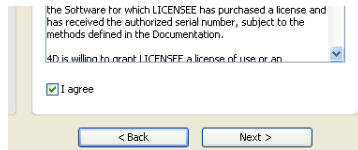


You will be shown a welcome window where you should choose the "I would like to activate 4th Dimension" radio button.

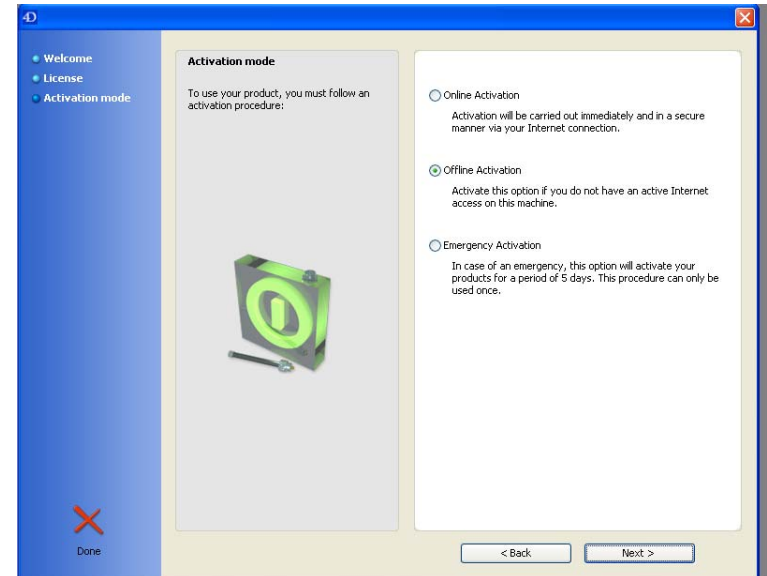
Then click "Next"



In the next window you should read the agreement. Click on the "I agree" check box, and then on the "Next" button"

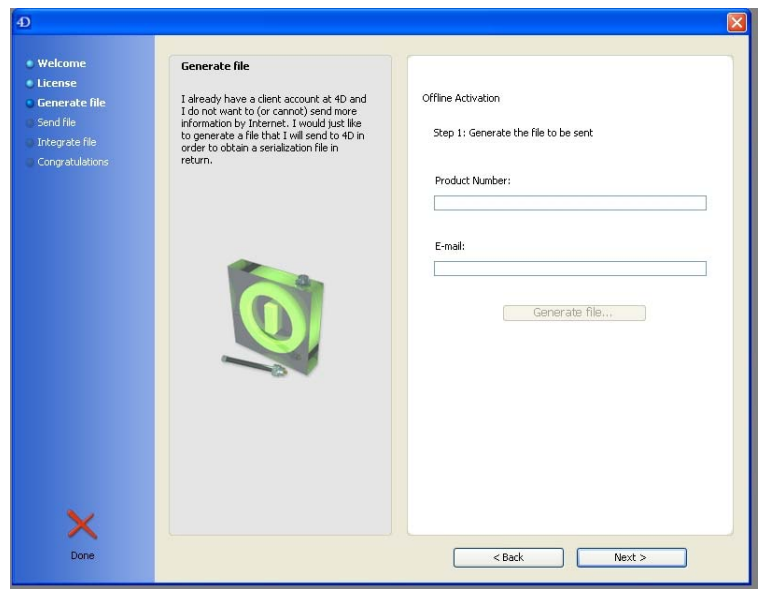


Then the activation mode window is shown.  
Choose "Offline activation" then click "Next"



You will then be shown the window to generate a file.  
*Do not enter information here- just click the "Next" button.*

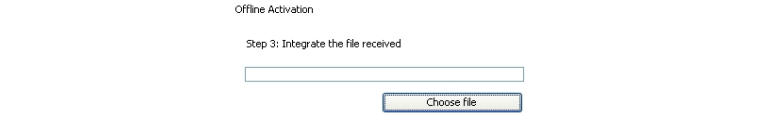




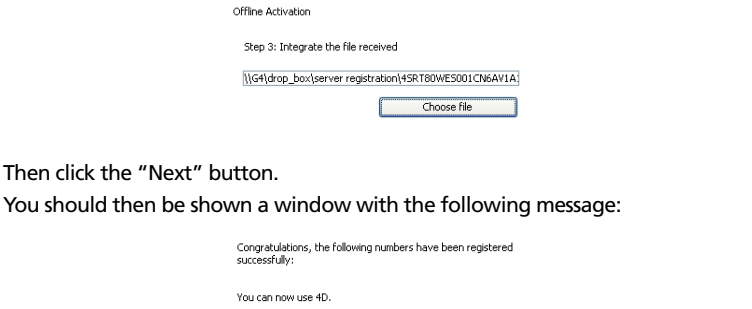
You will then be shown a window instructing you to send the generated file. Just click the “Next” button.

Offline Activation  
Step 2: Send the generated file

Then you will be shown a window where you are asked to integrate the file received.

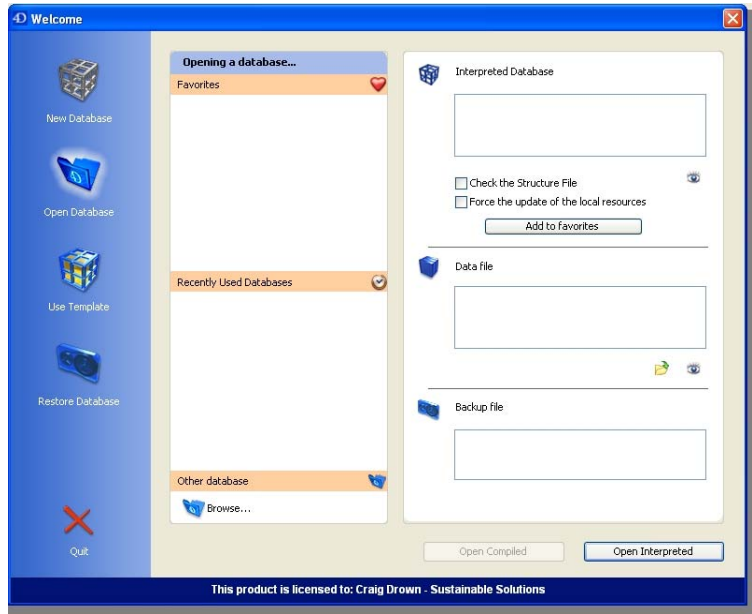


Click the “Choose File” button and choose the file sent to you by Sustainable Solutions.  
Once you have chosen the file, it will show in the box in the window:



Then click the “Next” button.  
You should then be shown a window with the following message:

You will then be shown the following window with the “Open a database” tab selected.



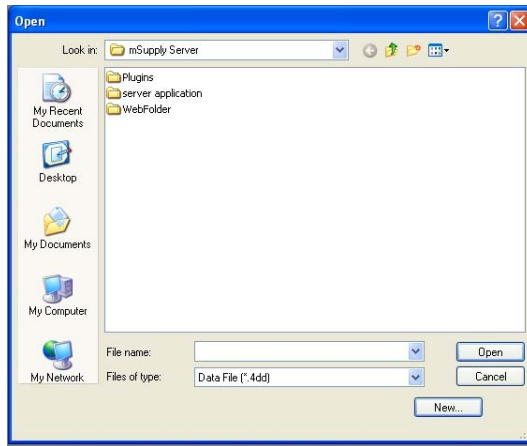
Click the *Browse* button. You will be shown an open/save window where you choose the program file. It is located in C:\Program Files\mSupply\mSupply

server\Program\mSupply.4Dc

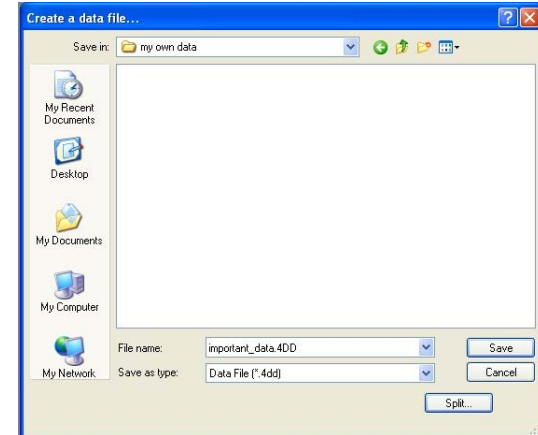


Click the “Open” button.

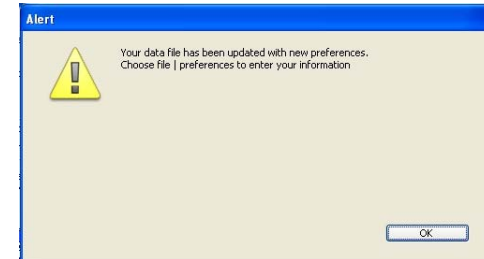
You will be shown a window where you can choose or create a new data file.



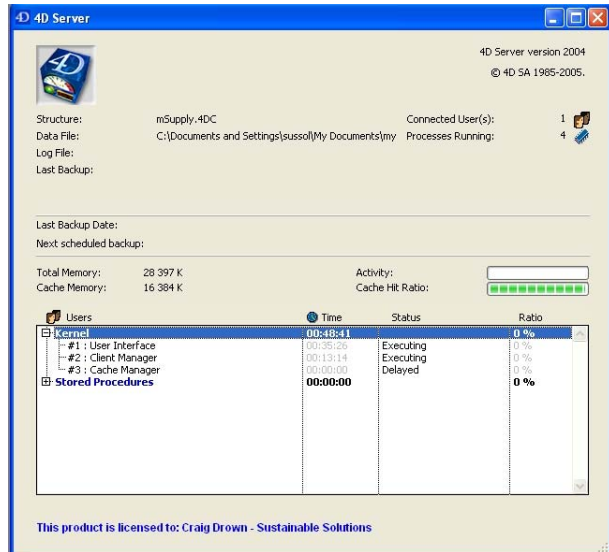
Click the **New** button to create a new data file. Another window will be shown where you can choose the location and name of your new data file.



We suggest you create a folder called “mSupply data” inside your “My Documents” folder. You can create the data file anywhere you like, but make sure you have read/write access to the directory or there will be problems. Once you have clicked the Save button you will be shown a message stating that your data file has been updated with new Preferences.



You will have to connect with the client software to configure the Preferences for mSupply and to enter the mSupply registration number. You will then be shown the 4D server admin interface:



Congratulations!

### If you get a Windows Security alert

If you are running Windows XP with SP2 or later installed you may get this alert:



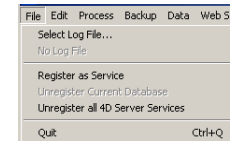
Make sure you click the *Unblock* button or the server will not function properly.

### About the backup scheduler window

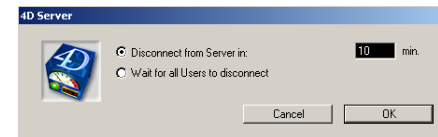
The new version based on 4D 2004 server has an integrated backup scheduler. Please request detailed documentation from Sustainable Solutions regarding its use.

### Setting the server to run as a service

The server should now be set to start automatically when the machine is turned on. This can be accomplished by setting the server to run as a service. Choose **File > Register Current Database as Service**



Quit the Sertver admin window by clicking the close box on the top right (or choose **File > Quit** from the menus). You will then be shown a disconnect window:

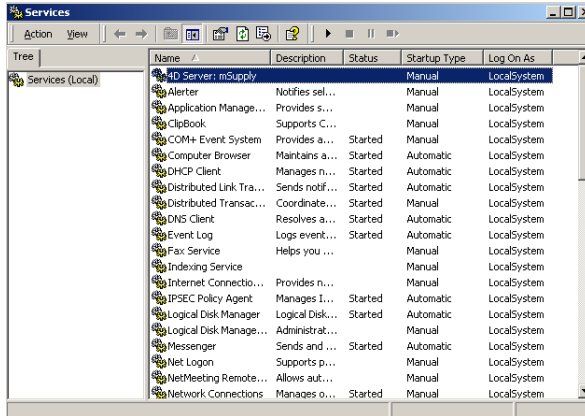


Type "0" into the box, and click **OK**. The server will quit.

Now open the services administrative interface by choosing **Start > (Settings) > Control Panel > Administrative Tools > Services**.

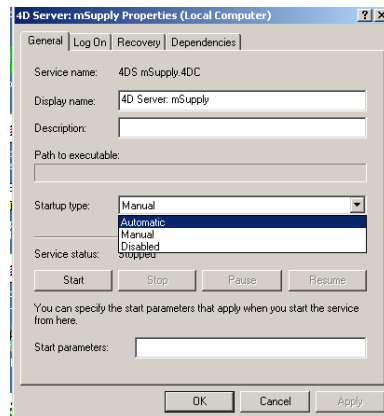
Right-click on the *Services* icon and choose **Send to > Desktop (as shortcut)**. This will provide quick access this area in the future.

Double-click on *Services* in the list. You will be shown this window.

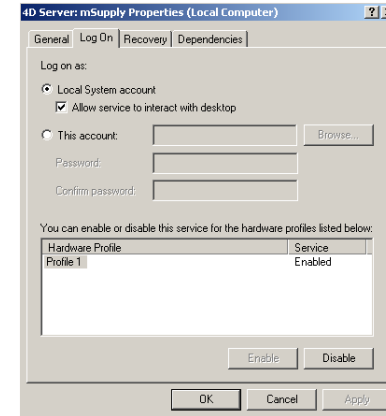


Double-click on 4DServer:mSupply - fortunately it is usually the first item in the list!

You will be shown the 4D service properties window. Change the *Startup type* in the drop-down list to *automatic*.



On the "Log On" tab, the settings should be shown below:



- Make sure "Log on as" is set to "local system account"
- Make sure "Allow service to interact with desktop" is checked.

Click "OK" to close the window.

You can now start the service by clicking the little *play* button (right facing triangle) on the toolbar with the 4D service highlighted.

From now on the 4D server will start automatically when the machine is turned on. There is no need to log-on to the machine.

On the desktop, we suggest you delete the *Start mSupply server* shortcut, as this will not start the 4D server as a service, and should not be used.

Should you need to manually stop and start the server in future:

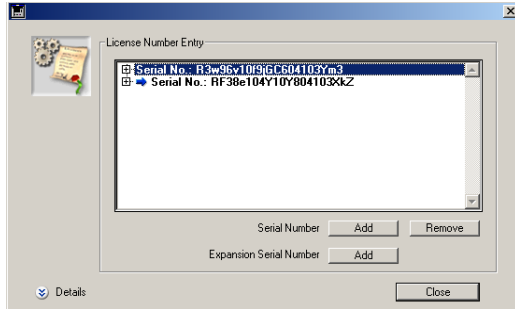
- To start, double-click the "Services" shortcut you made on the desktop, highlight the 4D server service, and click the "start" button (looks like a "Play" button on a VCR)
- To stop the server, make sure clients are not connected, then choose File > Quit on the server.

Next steps: install mSupply client then register mSupply.

### Entering Extra 4D serial numbers

When you registered 4D server the licence allowed 2 concurrent connections. If you have purchased extra connections, you should enter the serial number(s) now.

Choose *Help > Update licence*. This window is shown:



Click the *Add* button to enter additional licences.

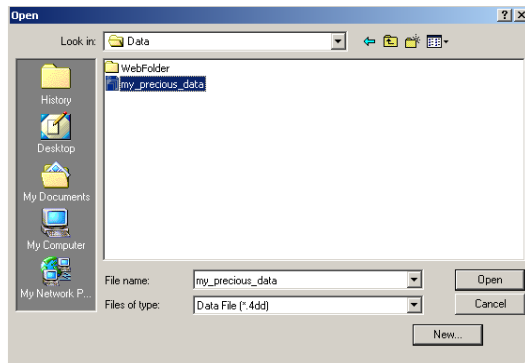
### Creating a new data file or choosing a different data file

From this point there should be no need to revisit any of the about procedures to operate mSupply. However, if you are testing, or starting a data file for a second organisation, you may wish either to change the data file mSupply is using or to create a new file.

The mSupply program (the files named "mSupply.4DC" and "mSupply.RSR") store the path to the last data file used, and the next time mSupply is started, the previous data file that was open is opened again unless there is user intervention or the "old" data file has been moved to a new location.

To intervene, hold down the "alt" key as the 4D server starts up.

You will be shown the standard open/save window:



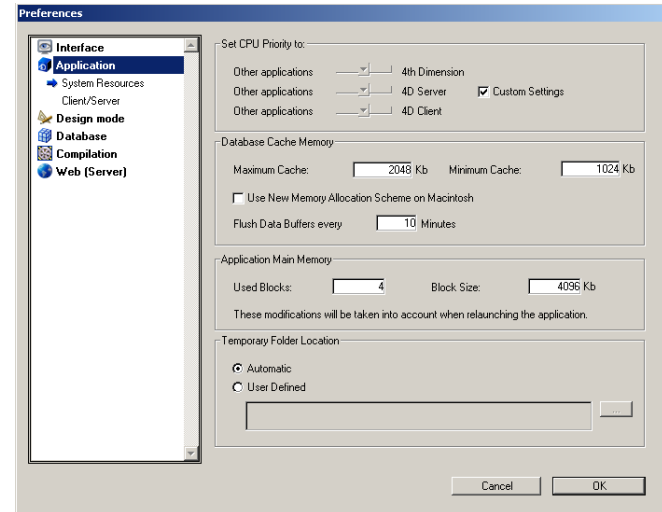
To create a new data file, click the "New" button.

To select an existing data file, navigate to the file's location then click the "Open" button.

### Setting server memory settings

The most important settings you may want to change are the memory settings and the cache flush interval.

Choose Edit > Preferences. This window is shown:



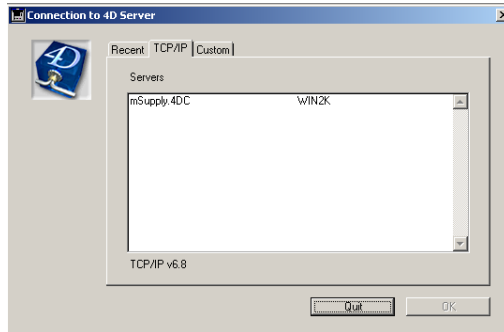
Click on the "Application" section in the left-hand list. Provided you have more than 256Mb of RAM installed, set the "Maximum cache" setting to half the physical RAM installed (eg. if you have 768Mb, set it to 384000 Kb). This cache memory is automatically integrated with the data stored in the data file, but provides much faster access times, significantly speeding up non-Ind queries and other procedures. The cache settings will have more effect in subsequent years once the system has a larger number of records to manipulate. In the first few months the performance differences will be negligible.

The "Flush Data Buffers every ...." setting determines how often the data on the hard disk is synchronized with the data in the cache. We recommend you set this to "2" minutes. (From the version based on the 4D 2004 engine we intend to use the ability to run a log file that records all unsaved changes and allows auto-

matic integration of the unsaved changes should there ever be a crash - e.g. in the event of a hardware failure or a sudden power outage)

## Installing mSupply Client

To run the installer, insert the mSupply CD, open Windows Explorer and double-click the mSupply\_client\_installer.exe file on the CD. Once the installation is completed, double-click the "start mSupply Client" shortcut on your desktop. The following window will appear:



The window lists available mSupply servers on your network. Click on the server you wish to connect to. Once you have connected successfully, the "Recent" tab will be shown first, and you can choose the server there. If for some reason network settings have been changed, and you cannot connect from the "Recent" tab, remember to look at the "TCP/IP" tab as well.

Clicking the "OK" button will take you to the mSupply password entry window. For new data files, the password is "user1" for the first user in the list. Click on the first user, then enter the password and click "OK"

## Firewalls and the like

To make it easy for you to connect, mSupply publishes details about available servers on a specific port. It is quite possible that products such as "Zone Alarm" and "Norton Personal Firewall" will block access to this port and stop discovery of the servers. Contact your system administrator if the list of available servers is blank.

## Registering mSupply

The procedure is described earlier in "Preferences" chapter of the mSupply user guide.

You will either have to phone or email the information to Sustainable Solutions to obtain a registration code.

Note that the code is keyed to your organisation name and the MAC address of the server. Changing either of these will require a new code, which we shall willingly provide.

## mSupply Preferences

Once registered, you may want systematically to go through the mSupply Preferences and choose appropriate settings.

## Saving your data file

At this point you should have a "clean" data file that is registered and is set up ready to use, but does not have other data in it.

## mSupply client installer also installs the following files and folders:

A folder called "4DNetwork" in the Windows folder on the startup volume, which contains network component files that need to be present for 4D to communicate over a TCP (and other types of) network(s).

Note that no reports are installed on 4D client. Each time 4D client connects to the Server, reports that have been added or modified on the server are automatically copied to the client.

Note that the installers have been set up to overwrite existing files, so reinstalling the software will restore any potentially corrupted files to their original state. The installer will not overwrite your data files, unless you have been wise enough to name your data file "example data" and put it in the "example data" folder.

## Graceful shutdown in the event of a power failure

Your mSupply server should be attached to a UPS. The UPS should be fitted with a control cable (serial, USB or network cable) that allows control software to detect a low power situation and shut down the server.

In the UPS control software set the shutdown to start at least two minutes before the power will fail.

Set it to run a batch file at that point. The file should contain the single line "net stop Service name" where the service name is the name displayed in the properties when you double-click the service name in the services window. In the example below the service name is "4DS mSupply.4DC" (not to be confused with the display name)

Service name: 4DS mSupply.4DC  
Display name: 4D Server: mSupply  
Description:

You may wish to test your typing skills by opening a command prompt:

```
C:\WINNT\System32\cmd.exe
Microsoft Windows 2000 [Version 5.00.2195]
(C) Copyright 1985-1999 Microsoft Corp.

C:\>net stop "4DS mSupply.4DC"
The 4D Server: mSupply service is stopping...
The 4D Server: mSupply service was stopped successfully.

C:\>
```

mSupply Server backup configuration

This information applies to 4D Server. If you are using mSupply in Single-user mode, the backup Preferences are set using the menu File > Preferences. Full database backup and restore functions are available, and it is not necessary to exit the database before performing a backup. The files to be included in the backup are set in the application Preferences. It is recommended that backups be performed automatically at regular intervals without user intervention. Before performing a scheduled automatic backup, the required parameters should be set. Choose Edit > Preferences, then click on "Backup" in the left-hand pane. There are four sub-headings in the Backup Preferences section.

Configuration options

Check the boxes adjacent to the files to be backed up ..... it is recommended that only the Data File box is checked.

Preferences

Application  
Design Mode  
Database  
Backup  
Configuration  
Scheduler  
Backup  
Restore  
Client-Server  
Web (Server)  
Web Services

Backup Contents

<input checked="" type="checkbox"/> Data File	important_data.4DO	1728KB
<input checked="" type="checkbox"/> Structure File	mSupply.4DC	8384KB
<input checked="" type="checkbox"/> User Structure File	mSupply.4ds	6KB

Attachments

Backup File Destination Folder

C:\Program Files\mSupply\mSupply Server\

Used Space: 6643 MB Free Space: 12818 MB

Last Backup Information

Last backup:	N.A.	N.A.
Next scheduled backup:	N.A.	N.A.
Backup file name:	N.A.	N.A.
Log backup file name:	N.A.	N.A.
Status:		

Log Management

☐ Use Log File:

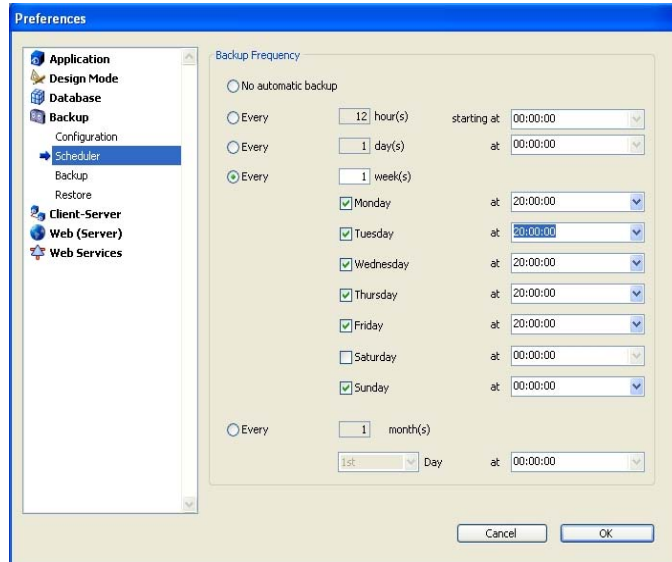
Cancel OK

The Backup File Destination Folder should be on a different volume from the one containing your database, and not on a different partition of the same drive.

It is possible to use a log file to provide complete roll-back functionality in the event of a system problem. Please consult Sustainable Solutions before turning this option on.

Scheduler Options

The Scheduler option allows the frequency of the backups to be set - in the above example, backups are made daily except Saturdays at 20:00 . Note that if Saturdays had been included, the "Every day(s)" option would have been selected, and the figure "1" entered in the box.. Sustainable Solutions recommends daily backups.

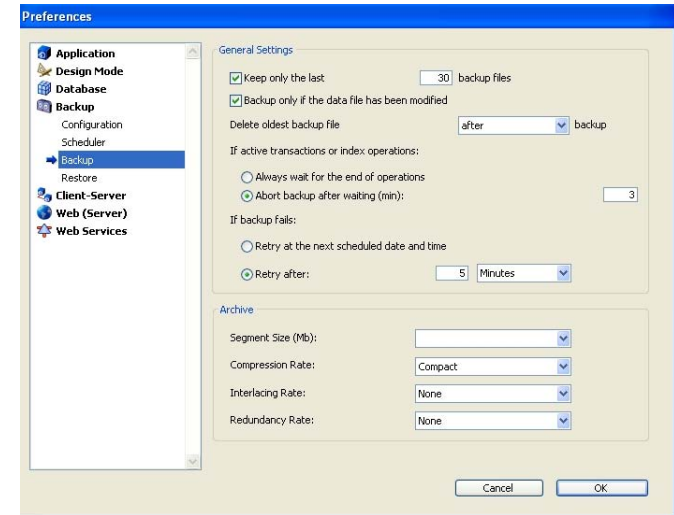


### Backup options

The Backup options window (shown below) allows the user to specify the number of backup files to be kept, and whether to create a backup in the event of no changes having been made since the previous backup (you can leave this unchecked).

We recommend you keep 30 backups.

The other available options are self explanatory, and the ones appropriate to the user's requirements should be selected.



### Restore options

Do not set the automatic restore option for mSupply- if you should need to do a restore please contact Sustainable Solutions for help.

## mSupply file extensions and types

This information is just for reference and to help your understanding.

On both Macintosh and Windows OS - five files.

- A structure file (.4DC suffix)
- A structure resource file (.rsr suffix)
- An executable file (.exe suffix)
- A data file (.4DD suffix)
- A data resource file (.4DR suffix)



---

## File arrangement

It is easiest to keep all relevant files in the same folder, in a reasonably accessible place on your hard drive. (For example, directly on your "C" drive.)

If you make copies, don't leave them in the same folder, or you'll just get confused!

There are several folders to store reports and queries that need to be in the same folder as your structure file. Note that these folders are automatically created when you unzip the program files the first time. They are mentioned here so those of you with an inquisitive streak won't unknowingly do damage!

- A reports folder. This stores reports that are used by the program. Leave this folder alone- store your own reports in the custom reports folder.
- A custom reports folder. Store the reports you create here.
- A custom queries folder. Store the queries (searches) you create here.
- A custom labels folder. Store any label templates you create here.

Note that on Windows or Macintosh the run time application (that is, the database engine- "4Drun.exe" file on windows) can reside anywhere on your hard disk, and does not need to be regularly backed up (although you should have one backup copy somewhere!)

---

## Getting the right data file when you open mSupply

Important! If you open mSupply by double-clicking the "start mSupply" icon on the desktop (Mac users- by double-clicking the structure file), mSupply will try to open the same data file that was last opened. It will open the same file each time if you repeat the same procedure. If you make a copy, and then double-click the copy of the structure file, mSupply may still open using the data file from the original if it can find it.

To choose the data file manually do this: hold down the option key (Mac) or Alt key (Windows) as you click the OK button in the password window. You will then be given an open/save box to choose the correct data file.

If you are not sure which structure and data file you are currently using, choose about mSupply... from the help menu (Windows) or the apple menu (Mac)

---

## Field formats

The following tables list the main tables in mSupply (There are some others, but we're not telling you about those!). This information will help you if you are building your own reports.

Note that if a field is indexed, finding information (querying) using that field will be very quick.









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