17.24. Exporting to the dashboard

Function fixed: mSupply version 5.03.00

This information is for sending data from your mSupply database to the mSupply dashboard database. The dashboard has a separate Postgres database so that its use does not slow down or interfere with your use of mSupply.

To access Dashboard export settings (administrators only), click on the *Admin* tab of the Navigator and click on the **Dashboard** icon:



Click on the **Export Settings** tab and you will see this window:



Postgres server section

In here you enter the details of the dashboard database server:

- **Server:** the URL or IP address of the dashboard database server
- **Port:** the port on the server that the database is listening for connections
- **User:** The user name that mSupply will use to access the Postgres database
- **Password:** The password mSupply will use to access the Postgres database
- **Database Name:** The name of the database that mSupply is to access

To make sure the details are correct and your copy of mSupply has access to the dashboard database, click on the **Test connection** button. A message will tell you whether the connection is successful or not.

Once the dashboard is enabled and the correct Postgres settings entered, there will be an automatic (scheduled) export every 24 hours. The next scheduled export is shown in the *Next scheduled export* field. This export process can be edited to run at different intervals based on your needs.

Export settings section

This section enables you to manually export data to the dashboard apart from the scheduled dashboard export.

The time and date of the next scheduled export to the dashboard database are shown in the **Next scheduled export** field. By default, all table data is exported incrementally — that is, only records that are new or have been changed since the last export are exported, which saves a substantial amount of time in the export process.

Redirect URL field: contains the URL that you should be redirected to after login or logout of the dashboard. The URL must not contain the `https://` part. When the dashboard is on the same server

as the mSupply server this will be the same as the URL in the **URL** field, if they are on different servers then it will be different.

URL field: contains the URL of the dashboard, including the `https://` and port e.g. https://localhost:8080.

The **Run Next Scheduled Export Now** button gives you a way of exporting the data immediately, without waiting for the next scheduled export. Useful if you want the dashboard to be updated immediately.

The **Full export of Checked Tables** button gives you a way of re-exporting the specific table data from scratch immediately. The table contains a list of all the database tables in mSupply that can be exported to the dashboard. Simply check the checkbox in the Export column to set that table to be exported to the dashboard when you click on The **Full export of Checked Tables** button. The **All/None** checkbox is a quick way of toggling between all tables selected and non-tables selected.

It is not advisable to run a full export of the database (i.e. including all database tables) unless really necessary. This is because it can take a loing time if the database is large and, during that time, some tables will be inaccessible so reports and other functions might not work in mSupply.

If you do run a full export (i.e. including all database tables) then you must enter your name and give a reason for the export in the *Add your name and reason for running the full export!* text field. This text will be added to the log.

When you click on either of them you must enter your authorisation code before the export will be carried out.

Click on the **OK** button to save your changes and the **Cancel** button to cancel any changes you have made.

Export Field Setting tab

By default all fields from all tables (except patient identifiable fields and other security related information) are exported to the dashboard. However, you can refine the export and define exactly which fields are exported to the dashboard, including some patient information if desired by clicking on the **Export Field Settings** tab. This is what the tab looks like:



- **Table** drop-down list: Select the database table whose fields to export you want to modify
- **Table**: Shows all the fields in the database table selected in the **Table** drop-down list that are available for export. All will be selected by default.
- **All/None** checkbox: Checking/unchecking this will check/uncheck all the checkboxes in the *Included field* column of the table for the selected database table.
- **Allow patient export** checkbox: If checked, this will allow export of any selected patient data fields to the dashboard.

To add or remove specific fields from the dashboard export, select the table in the **Table** drop-down

list. All its fields available for export will be displayed in the table below it. Any field that has a tick in the *Included field* column will be exported to the dashboard so, to prevent a field being exported uncheck it, to export it make sure it is checked (by clicking on the appropriate checkbox).

If any fields with patient identifiable information are selected for export, the **Allow patient export** checkbox must also be ticked before it will be exported.

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