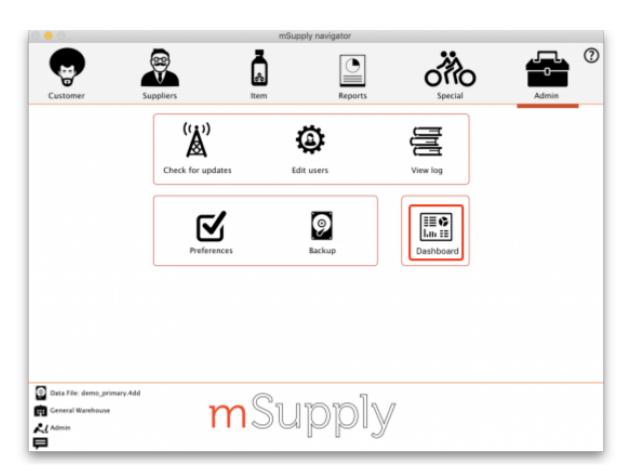
16.18. Exporting to the dashboard

Function added: mSupply version 4.04.00

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:

Last update: 2021/04/28 import_and_export:export_to_dashboard https://docs.msupply.org.nz/import_and_export:export_to_dashboard?rev=1619604181 10:03

	Dashboard Repor	ts Dashboard Tab	Export Settings	
Postgres Server				
Server	localhost			
Port	5432			
User	postgres			
Password				
Database Name	dashboard			Test connection
Database Name	dashboard			Test connection
Database Name Export Settings	dashboard			Test connection
		All/None Execut		
	Table	All/None Export		Next scheduled export:
	Table			
	Table abbreviation account			Next scheduled export: 15/06/20 9:27 AM
	Table abbreviation account Admitted_from			Next scheduled export: 15/06/20 9:27 AM Force full export
	Table abbreviation account			Next scheduled export: 15/06/20 9:27 AM
	Table abbreviation account Admitted_from aggregator			Next scheduled export: 15/06/20 9:27 AM Force full export (next export only)
	Table abbreviation account Admitted_from aggregator asset			Next scheduled export: 15/06/20 9:27 AM Force full export
	Table abbreviation account Admitted_from aggregator asset asset_condition asset_location			Next scheduled export: 15/06/20 9:27 AM Force full export (next export only) Default
	Table abbreviation account Admitted_from aggregator asset asset_ asset_ condition			Next scheduled export: 15/06/20 9:27 AM Force full export (next export only)
	Table abbreviation account Admitted_from aggregator asset asset_condition asset_location asset_status			Next scheduled export: 15/06/20 9:27 AM Force full export (next export only) Default
	Table abbreviation account Admitted_from aggregator asset asset_condition asset_location asset_status			Next scheduled export: 15/06/20 9:27 AM Force full export (next export only) Default

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.

To perform an immediate (manual) export:

• Check the boxes to choose the data you want to manually export to the dashboard (check the **All/None** box to choose all options or click the **Default** button to restore to default selections)

- Click the **Export** button
- Enter the authorisation code
- Click **OK**

By default, **transaction** and **requisition** data is only exported incrementally — that is, only transactions and requisitions that are new or have been changed since the last export are exported, which saves a substantial amount of time in the export process. All other tables are re-exported from scratch each time.

In order to force a *full* export of transactions and/or requisitions, select the **Force full export** checkbox before a manual export, or leave it checked and exit (OK) to cause a full export on the next scheduled export. The full export will only happen *once* — the option will be automatically turned off for subsequent exports.

Previous: 17.23. Exporting assets | | Next: 18. Tenders

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Permanent link: https://docs.msupply.org.nz/import_and_export:export_to_dashboard?rev=1619604181

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