

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:

The screenshot shows a 'Dashboard' window with three tabs: 'Dashboard Reports', 'Dashboard Tab', and 'Export Settings'. The 'Export Settings' tab is active and highlighted with a red box. Below the tabs, there are two main sections: 'Postgres Server' and 'Export Settings'.

Postgres Server section:

- Server: localhost
- Port: 5432
- User: postgres
- Password: (masked with dots)
- Database Name: dashboard
- Test connection button

Export Settings section:

- ☐ All/None
- Table list with Export checkboxes:

Table	Export
abbreviation	<input type="checkbox"/>
account	<input type="checkbox"/>
Admitted_from	<input type="checkbox"/>
aggregator	<input checked="" type="checkbox"/>
asset	<input type="checkbox"/>
asset_condition	<input type="checkbox"/>
asset_location	<input type="checkbox"/>
asset_status	<input type="checkbox"/>
asset_type	<input type="checkbox"/>
- Next scheduled export: 15/06/20 9:27 AM
- ☐ Force full export (next export only)
- Default button
- Export button (highlighted with a red box)

At the bottom of the window are 'Cancel' and 'OK' buttons, with the 'OK' button highlighted by a red box.

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.

Export settings section

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](#)

From:

<https://docs.msupply.org.nz/> - mSupply documentation wiki

Permanent link:

https://docs.msupply.org.nz/import_and_export:export_to_dashboard?rev=1619604233

Last update: **2021/04/28 10:03**

