

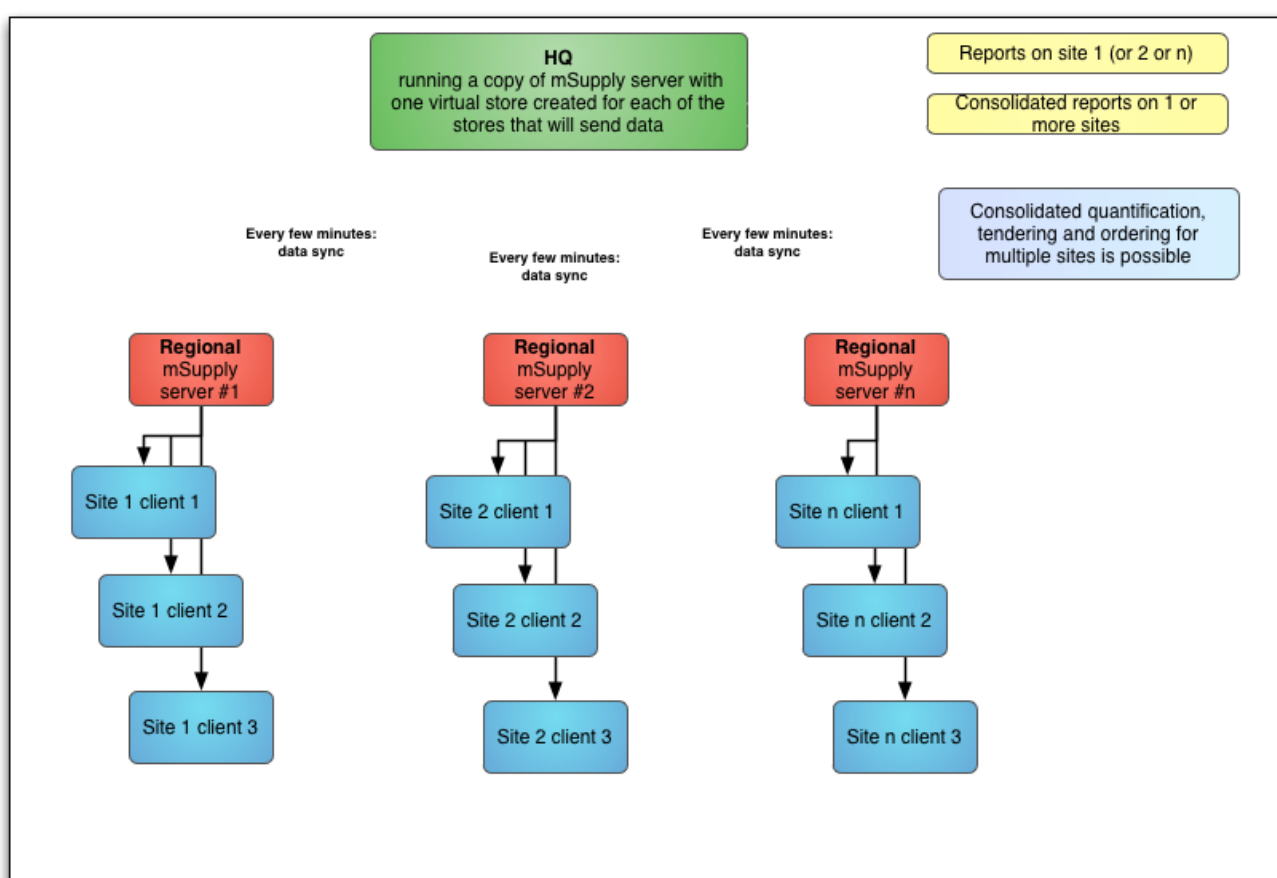
25.03. Remote synchronisation

Updated: mSupply Version 4.0.3

mSupply's remote synchronisation allows mSupply running stores on local servers to send data to a central mSupply server for combined reporting.

Synchronisation explained

It's like this:



Definitions

- The **primary server** is a central mSupply server, which controls:
 - the master system data which is common across all stores e.g. names, items and their visibility
 - the store records themselves, and their non-sync related preferences (⇒ all stores exist on the primary)
- The **sync server** is a central mSupply server (often running on the cloud) which:
 - aggregates the store data from all stores (⇒ centralised reporting, and a real-time backup)

- controls how all of the stores sync with each other
- routes transfers from one store to another
- runs the mSupply dashboard
- In any given setup, there will only be **one** sync server, and it must be running a **web server**. There will also only be **one** primary server. In most cases, these are actually the **same**, but since mSupply v4.03 it has been possible to keep them separate - this has some advantages:
 - the primary server doesn't need to be online all the time, so it can be a local server and still be able to centrally administer system data, without being a bottleneck for sync
 - the sync server (especially if it's in the cloud) can be always online and available for remote access to reports and the dashboard, and for processing and routing of sync data
- A **satellite site** is any mSupply server (or single-user standalone copy of mSupply, or a copy of mSupply mobile) which is **not the primary server** i.e. it cannot administer system data (⇒ the sync server, if different from the primary server, can also be a satellite site)
- A **remote site** is any mSupply server (or single-user standalone copy of mSupply, or a copy of mSupply mobile) which is **not the sync server** i.e. it cannot administer sync (⇒ the primary server, if different from the sync server, can also be a remote site)
- The syncing process is initiated from each remote site on a schedule, and pushes its own store-specific data to the sync server
 - if the remote site is also a satellite, it pulls any system data from the sync server
 - if the remote site is also the primary, it pushes system data to the sync server
- The primary server, sync server and all of the satellites and remote sites are collectively referred to as **sync sites**.
- Each sync site has a unique ID and connection parameters (IP address, username and password), setup in the [synchronisation preferences](#), along with a list of the other sync sites with which it can send/receive synchronisation data. These settings are complicated, easy to get wrong, and so should **only be modified by Sustainable Solutions**.
- To preserve data integrity, and to avoid potential clashes where more than one sync site tries to modify the same data, **only one sync site can edit/update any specific type of data**.
 - *System data* which is common to all stores (e.g. suppliers, customers, items) can only be edited or imported on the primary server - changes are synced to all satellite servers (see below for details).
 - *Store-specific data* (e.g. transactions, stock, locations) can only be edited or imported on the sync site where the store is **active**. Changes to store-specific data are only synced to the instance of the corresponding store on other sync site(s), depending on the store sync preferences (see below for details).

Store setup

Stores to be synced will exist as separate instances of the same store on more than one sync site:

- on the primary server - the store itself and its non-sync related preferences are editable ⇒ all stores must exist on the primary server
- on the sync server - the store's sync preferences are editable ⇒ all stores must exist on the sync server



On a mirrored sync system, the store must be created first of all on the primary server. It will then sync to the sync server, where the store's site can then be assigned and its sync



preferences configured.

- store-specific data (e.g. store transactions, stock) can only be edited on a single sync site - the site on which the store is defined as **Active**. This is controlled on the sync server by the store preferences on the *Synchronisation tab* for each **virtual store** on each sync site:

Edit store

Badli_AMS

Visibility **Synchronization**

Synchronisation type: Collector store

☐ Set as local store

Click to un-lock

Sync ID: 5

Sync with:

Sync ID	User name	Sync type	Local
2	PMGH	Active/collector	<input type="checkbox"/>
3	AMGH	None	<input type="checkbox"/>
4	LAE_AMS	Active/collector	<input type="checkbox"/>
5	Badli_AMS	Active/collector	<input checked="" type="checkbox"/>
6	Alotau_AGH	Active/collector	<input type="checkbox"/>
7	Hagen_AMS	Active/collector	<input type="checkbox"/>
9	Hagen_GH	None	<input type="checkbox"/>
11	Alotau PMS	Active/collector	<input type="checkbox"/>
12	Wewak_ams	Active/collector	<input type="checkbox"/>
13	Boram_General	None	<input type="checkbox"/>
14	Milne_Bay_PMS	None	<input type="checkbox"/>
15	Vanimo_GH	None	<input type="checkbox"/>
16	Gurukha GH	None	<input type="checkbox"/>

Cancel OK

Synchronisation type drop down list: Shows the sync type of the current store. Will be editable on the sync server if you have unlocked it using the **Click to unlock** button.

Click to unlock button: Click it to enter the unlocking password to enable you to edit the settings on this tab.

Set as local store checkbox: Will be editable on the sync server if you have unlocked it using the **Click to unlock** button. If checked, this will change the store's **Sync ID** to be that of the current site and will uncheck any of the elements in the **Local** column in the **Sync with** table.

Include transactions in sync checkbox: Only affects dispensary stores, as transactions are always synced otherwise. If checked for a dispensary store, this will also sync prescriptions and related dispensary data. As this detailed information is rarely needed at central level, and can potentially generate a lot of extra sync traffic, the default is that it is switched off.

Sync ID field: Displays the sync ID of the current store so that you can see which one in the table below you're talking about! The store's sync ID should almost always be the ID of the site where the store is active.

Sync with table: Shows the other sites in your sync setup that the current store will sync with. Also

defines what relationship those other store instances have to your current one and therefore what records need to be sent to that site from the instance of the current store on the current site. Will be editable (**only** on the sync server) if you have entered the password using the **Click to unlock** button. Checking any checkbox in the **Local** column will set the store's **Sync ID** to be that of the selected row, and will uncheck any others as well as the **Set as local store** checkbox.



This setting is a bit confusing, but it does work to understand it as 'whatever the sync type of the store is on that site'.



If your version of mSupply server is pre 3.50, after changing sync settings for a store **you will have to restart the mSupply application on the primary server for the changes to be applied.**

- Once a store has been set up (see the relevant parameters below), item and store visibility for the store needs to be set up on the **primary server** - see [Virtual stores, Controlling item visibility](#).
- To do that, once you log in to the primary server, you need to switch to the new store - see [Switching store](#)
- To do that, you need to have permission to log in to it - see [Managing users](#) (It's a good thing

this doesn't happen often! 😬)



These settings are necessarily complex and should **only be modified by Sustainable Solutions**, after discussions to agree on the configuration which is the best fit for requirements.

Store sync types

Each store in a synchronised system needs to have a sync “type” as described here.

Active

A store whose sync type is **Active** means that the store-specific data can be edited (added, edited, deleted) on the sync site where you are editing/viewing this store.

Collector

A store whose sync type is **Collector** means that the store-specific data can *not* be edited on this sync site. The store on this server receives all store data from an active store on another sync site. i.e. it is a replica of a corresponding active store on another sync site. This means that the store can be examined and reports generated on this sync site.

Transfer

A store whose sync type is **Transfer** is similar to the Collector type except that the store on this sync site is used **only** as a vehicle for receiving stock transfers or requisitions from other stores on the *same* sync site and passing them on to the corresponding store on other sync sites. It doesn't receive any other store data (such as stock lines). That is, *it is not a replica of an active store*, and should not be used as such. The store can *not* be examined or have reports generated on this sync site. The benefit of a Transfer store over a Collector store is that Transfer stores require less data to be synced between servers.

Store sync-with options

The Store 'sync-with' options control which store-specific synchronisation data gets sent to the other sync sites which are linked to that sync site:

None

A value of **None** means that this store doesn't sync with the corresponding store on the selected sync site. That is, there is no instance of this store on that sync site.

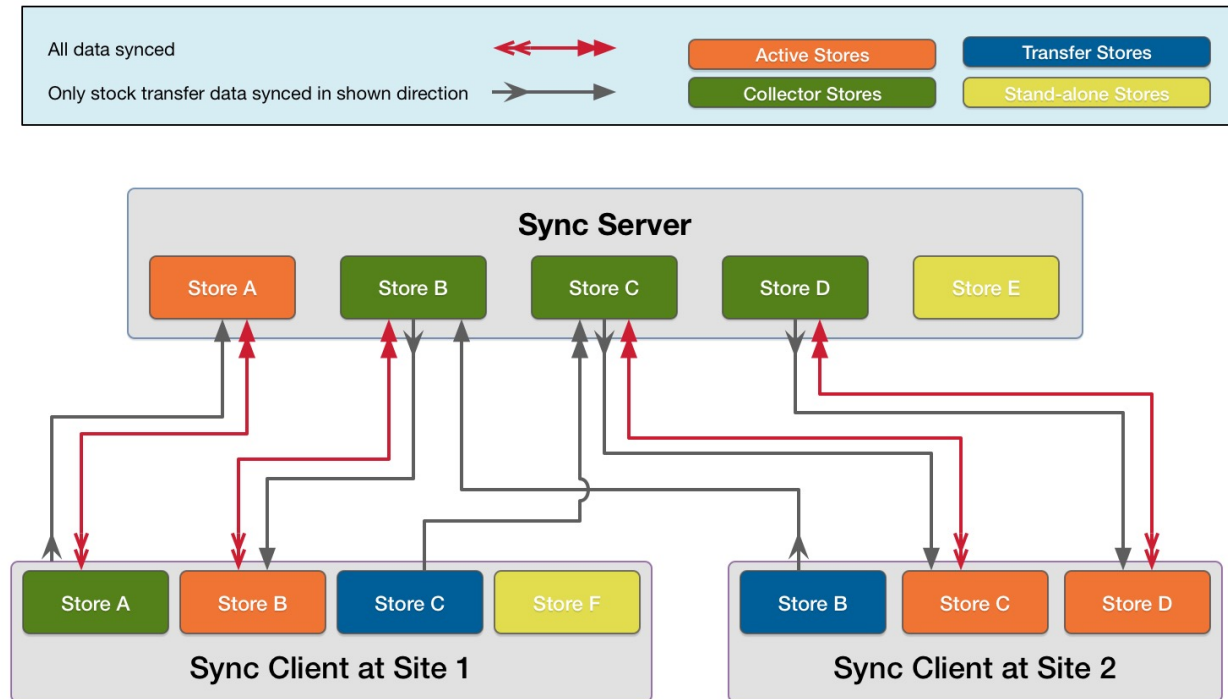
Active/collector

A value of **Active/collector** means that store-specific data edits, including any edits to the core store data, are synced to the corresponding store instance on the selected sync site. The store instance on the selected sync site will normally be of type *Active* or *Collector*.

Transfer

A value of **Transfer** means that any updates to the core store data, or any stock transfers or requisitions into that store, are synced to the corresponding store instance on the selected sync site. No other transactions or other store-specific data will be transferred. The store instance on the selected sync site will normally be of type *Transfer*.

mSupply Sync Example



- In a standard (non-mirrored) setup, the **primary server** is the **sync server**
- In a mirrored setup, the **primary server** is like one of the remote sites, except that:
 - it can also control system data
 - like the **sync server**, it has copies of *all* stores

Store A

An example of a store on the sync server which needs to also be reportable on another remote site.

Store A exists as an *Active store* on **sync server** and as a *Collector store* on **remote site 1**:

- On **sync server** store-specific data for this store can be entered. It can also receive stock transfers or requisitions from other stores active on the same sync site (**sync server**). This data is then synced to **remote site 1**.
- On **remote site 1** store-specific data for this store cannot be entered. However, the store can receive stock transfers or requisitions from other stores active on the same sync site (**remote site 1**). These will be synced to **sync server**.

Sync server settings for Store A

Synchronisation type : Active store

☒ Set as local store

☒ Include transactions in sync

Sync ID 1

Sync with :

Sync ID	User name	Sync type
2	Sync Client 1	Active/collector
3	Sync Client 2	None

Remote site 1 settings for Store A

Synchronisation type : Collector store

☐ Set as local store

Sync ID 1

Sync with :

Sync ID	User name	Sync type
1	Sync Client 1	Active/collector

Store B

An example of a store on one remote site which needs to receive stock transfers from a store on another remote site.

Store B exists as a *Collector store* on **sync server**, an *Active store* on **remote site 1**, and a *Transfer store* on **remote site 2**:

- On **remote site 1**, store-specific data for this store can be entered. It can also receive stock transfers or requisitions from other stores active on the same sync site (**remote site 1**). This data is then synced to **sync server**.
- On **sync server**, store-specific data for this store cannot be entered. However, it can receive stock transfers or requisitions from other stores active on the same sync site (**sync server**). These are then synced to **remote site 1**.
- On **remote site 2**, store-specific data for this store cannot be entered, and **is not** synced from **sync server**. However, it can receive stock transfers or requisitions from other stores active on the same sync site (**remote site 2**). These are then synced to **sync server**, and then to **remote site 1**.

Sync server settings for Store B

Synchronisation type : Collector store

☐ Set as local store

Sync ID 2

Sync with :

Sync ID	User name	Sync type
2	Sync Client 1	Active/collector
3	Sync Client 2	Transfer

Remote site 1 settings for Store B

Synchronisation type : Active store

☒ Set as local store

☒ Include transactions in sync

Sync ID 2

Sync with :

Sync ID	User name	Sync type
1	Sync Client 1	Active/collector

Remote site 2 settings for Store B

Synchronisation type : Transfer store

☐ Set as local store

Sync ID 2

Sync with :

Sync ID	User name	Sync type
1	Sync Client 2	Active/collector

Store C

Another example of a store on one remote site which needs to receive stock transfers from a store on another remote site.

Store C exists as a *Collector store* on **sync server**, an *Active store* on **remote site 2**, and a *Transfer store* on **remote site 1**:

- On **remote site 2**, store-specific data for this store can be entered. It can also receive stock transfers or requisitions from other stores active on the same sync site (**remote site 2**). This data is then synced to **sync server**.
- On **sync server**, store-specific data for this store cannot be entered. However, it can receive stock transfers or requisitions from other stores active on the same sync site (**sync server**).

These are then synced to **remote site 2**.

- On **remote site 1**, store-specific data for this store cannot be entered. However, it can receive stock transfers or requisitions from other stores active on the same sync site (**remote site 1**). These are then synced to **sync server**, and then to **remote site 2**.

Sync server settings for Store C

Synchronisation type : Collector store

☐ Set as local store

Sync ID 3

Sync with :

Sync ID	User name	Sync type
2	Sync Client 1	Transfer
3	Sync Client 2	Active/collector

Remote site 1 settings for Store C

Synchronisation type : Transfer store

☐ Set as local store

Sync ID 3

Sync with :

Sync ID	User name	Sync type
1	Sync Client 1	Active/collector

Remote site 2 settings for Store C

Synchronisation type : Active store

☒ Set as local store

☒ Include transactions in sync

Sync ID 3

Sync with :

Sync ID	User name	Sync type
1	Sync Client 2	Active/collector

Store D

An example of a store on a remote site which needs to also be reportable on the sync server.

Store D exists as an *Active store* on **remote site 2** and as a *Collector store* on **sync server**:

- On **remote site 2**, store-specific data for this store can be entered. It can also receive stock transfers or requisitions from other stores active on the same sync site (**remote site 2**). This data is then synced to **sync server**.
- On **sync server**, store-specific data for this store cannot be entered. However, it can receive stock transfers or requisitions from other stores active on the same sync site (**sync server**). These are then synced to **remote site 2**.

Sync server settings for Store D

Synchronisation type : Collector store

☐ Set as local store

Sync ID 3

Sync with :

Sync ID	User name	Sync type
2	Sync Client 1	None
3	Sync Client 2	Active/collector

Remote site 2 settings for Store D

Synchronisation type : Active store

☒ Set as local store

☒ Include transactions in sync

Sync ID 3

Sync with :

Sync ID	User name	Sync type
1	Sync Client 2	Active/collector

Store E

An example of a store which is local to the sync server only.

Store E exists only on **sync server** (and **primary server**, if different):

- On **sync server**, store-specific data for this store can be entered. It can also receive stock transfers or requisitions from other stores active on the same sync site (**sync server**). This data is not synced anywhere.

Sync server settings for Store E

Synchronisation type : Active store

☒ Set as local store

☒ Include transactions in sync

Sync ID 1

Sync with :

Sync ID	User name	Sync type
2	Sync Client 1	None
3	Sync Client 2	None

Remote site settings

None

Store F

An example of a store which is local to a single remote site.

Store F exists on **remote site 1**, but it must also exist on the **sync server** (and **primary server**, if different) as a *Transfer store*, so that it can be centrally managed:

- On **remote site 1**, store-specific data for this store can be entered. It can also receive stock transfers or requisitions from other stores active on the same sync site (**remote site 1**). This data is not synced anywhere.

Sync server settings for Store F

Synchronisation type : Transfer store

☐ Set as local store

Sync ID 2

Sync with :

Sync ID	User name	Sync type
2	Sync Client 1	Active/collector
3	Sync Client 2	None

Remote site 1 settings for Store F

Synchronisation type : Active store

☒ Set as local store

☒ Include transactions in sync

Sync ID 2

Sync with :

Sync ID	User name	Sync type
1	Sync Client 1	Transfer

System vs. store-specific data

The table below defines which data types are considered as system or store-specific. Other types of data (e.g. preferences, user permissions are always local to the sync site, and are not synchronised).

Data	Sync records	Notes
Items	System	Including item-related data e.g. item categories, units
Names (except patients)	System	Including name-related data e.g. name categories, contacts
Visibility of items and names	System	
Merging of items and names	System	Except patients
Groups and departments	System	
Item master lists	System	
Budgets and accounts	System	
Transaction categories	System	
Purchase order categories	System	
Location types	System	

Data	Sync records	Notes
Regimens and indicators	System	
Abbreviations and item directions	System	Dispensary data
Customer stock history and requisitions	Store	
Locations	Store	
Stock and stocktakes	Store	
Transactions, payments and prescriptions	Store	Including other transaction-related data e.g. inventory adjustments, backorders, builds
Purchase orders	Store	Unless the <i>Procurement is done centrally</i> preference is switched on, in which case purchase orders can be entered on the primary for any store, regardless of its sync type
Goods received	Store	
Indicator values	Store	
Patients and patient data	Store	Dispensary data
Prescribers	Store	Dispensary data

Stores

These are a special case:

- changes to the store record itself (all except the *Synchronisation* tab) are allowed only on the primary server, and then propagate on to any other sync sites as determined by the “syncs with” settings for that store on the sync server (i.e. to any other sync sites where “syncs with” is not *None*)
- the store's sync preferences (the *Synchronisation* tab) are controlled on the sync server
- a store should only ever be *Active* on one sync site at a time (usually on the site where it is *Local*)

Centralised procurement

If this preference is switched on in the primary site, then purchase orders can be entered for any store on the primary, regardless of its sync type (i.e. not just for active stores).

If it is switched on in a satellite, then purchase orders cannot be entered for any store on the satellite, even if it is active.

When this preference is changed on the primary, the change will propagate to all the satellites as well.



It is still possible to edit the preference on the satellite (e.g. to allow local procurement for stores active on that site), but if that is the case, then the related permissions for purchase orders for those stores on the primary will need to be disabled manually in order to prevent purchase orders for those stores being editable on both sites.

Dispensary data

Prescriptions

By default, prescriptions and any other operations in dispensary mode which affect stock levels are not synced to the sync server, unless the *Include transactions in sync* option is enabled in the store sync preferences, as these can potentially generate a lot of sync traffic and there is usually no need for the central users to have this level of detail - the same site will usually have another store which supplies the dispensary and its transactions will be synced, and that's usually enough to infer usage for the dispensary store.

If this preference is switched off in a dispensary store on a remote site, the following data will not be synced back to the central sync server:

- Transactions (including backorders, builds etc.)
- Prescriptions
- Stock and stocktakes

If the preference is switched on, all of the store's transaction & stock data will be synced to the sync server.

Patients

Patients in mSupply are a special kind of customer, but for the purposes of synchronisation, we need to treat them differently - more like store-specific data rather than system data. This is because patient data is often locally controlled rather than centrally.

Since mSupply v4.09, patients have a *home store*, initialised either according to the store they were created in, or according to their most recent prescription. Patients and their related data (patient medication records, repeats, insurance policies) can only be edited in an active dispensary store on the same *home site* where their home store is active.

Patients and their related data records will be synced to the primary server, and forwarded on to any other site which has an active/collector store in which the patient is visible. Prescriptions will be allowed in dispensary stores on any of those sites, except for repeats which can only be processed in dispensary stores on the patient's home site.

Newly created patients will also be made visible in any other dispensary stores on the home site, depending on the store's visibility preferences. Subsequently, patient visibility is controlled from the primary server in the same way as for other name (customer & supplier) records.

Other dispensary data

Abbreviations, item directions, insurance providers and patient event types are treated as a special kind of system-specific data i.e. they are editable on the primary, but only synced to sites having at least one active dispensary store.

Prescribers are also treated as a special kind of store-specific data, like patients i.e. they are editable

in any active dispensary store on their home site, synced back to the primary server, and shared with dispensary stores on other sites where they've previously prescribed.

Transferring patients/prescribers to a different home store

Watch this space...

Transfers

Transfers occur when there are two stores involved in a transaction, and includes stock transfers, requisitions (from a mobile store) and internal requisitions (from another desktop store). In a syncing system, very often these two stores are not active on the same site, so there has to be extra processing to ensure that both halves of the transaction are synced to both the initiating store/site and the responding store/site.

Both stores need to exist on both sites, and usually the initiating store is a transfer store on the responding site, and vice-versa. As of mSupply v3.83, unless both stores are active on the same site (in which case, everything can be done locally), the bulk of the processing is done on the central sync server when it detects the initiating half of a transfer transaction. In simple terms, the logic is something like this:

1. when the sync server detects the initiating half of a transfer transaction
 1. it creates the responding half of the transaction, but with a dummy invoice/serial number of -1
 2. it ensures that both halves of the transaction are synced to both initiating and responding sites
2. when the responding site receives the responding half of the transaction
 1. it assigns the next invoice/serial number for the store and sends that back to the sync server
 2. it also creates a log message for the initiating half of the transaction and sends that back to the initiating site via the sync server
3. any subsequent changes to the initiating half of the transaction (usually very limited in scope) on the initiating store/site will be synced back to the sync server (according to the normal sync rules)
4. any subsequent changes to the responding half of the transaction on the responding store/site will be synced back to the sync server (according to the normal sync rules)

Stock transfers

- This is where the customer in a customer invoice is another store
- The initiating half of the transaction is where the customer invoice is finalised in the initiating store/site
- The responding half of the transaction is a supplier invoice (on hold by default) in the responding store/site

Mobile requisitions

- This is where the supplier in a supplier (aka request) requisition is another store
- The initiating half of the transaction is where the supplier requisition is finalised on mobile
- The responding half of the transaction is a response requisition in the responding store/site
 - this shows up as a customer requisition on mobile if the responding store is active on another mobile site
 - or as a response requisition if the responding store is active on a desktop site
 - the user can create one or more customer invoices to fulfil the requisition
 - these customer invoices (when finalised) will generate corresponding supplier invoices back in the initiating store as stock transfers

Internal requisitions

- This is where the supplier in a purchase order is another store, and is a two-stage process
- The initiating half of the first transaction is where the purchase order is confirmed in the purchase order store/site (i.e. where the purchase order is editable)
 - if centralised procurement is enabled, this will be the primary site, otherwise it will be the normal initiating store/site (i.e. where the purchase order's store is active)
- The responding half of the first transaction is a customer invoice in the responding store/site
- The initiating half of the second transaction is where the customer invoice is finalised in the responding store/site
 - note that adding extra customer invoice lines before the invoice is finalised will create corresponding new goods received lines
- The responding half of the second transaction is a goods received record in the initiating store/site (i.e. where the purchase order's store is active)
- If centralised procurement is enabled:
 - the received quantities for the original purchase order lines will be updated on the primary whenever the corresponding goods received lines are received there (and forwarded from there to the initiating store/site)
 - when the primary receives any subsequent updates to goods received lines from the initiating store/site, it will update the quantities in the corresponding purchase order lines
- If centralised procurement is not enabled, the received quantities for the original purchase order lines will be updated in the initiating store/site when it receives the goods received lines from the primary

Reporting

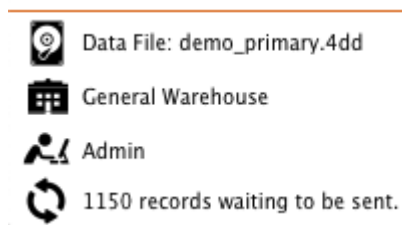
- On the sync server if you login in supervisor mode, you can then run reports on one or more stores. The reports can answer questions such as:
 - How much stock on hand of item X (or all items) are there at each location?
 - What is the value of stock on hand across the whole system?
 - How many of item X is being used each month at each location?
- When the synchronisation system is turned on, a new **Special > Users report... > Sync report...** menu item is available. Choosing this will create a report showing the last time each of your sync stores connected to the central sync server. Those that connected more than a month ago will be highlighted in red.

Requirements

- A license from Sustainable Solutions to use the web server module and the synchronisation module on the primary server.
- Internet at each sync site. This doesn't have to be on all the time for each satellite server, but at least an hour or so per day or per week (depending on the transaction volume and the speed and latency of the internet, and how often you need primary server data updated). Obviously, the internet needs to be on at the primary server at the same time.

How to tell if synchronisation is happening

The Manual Sync Button



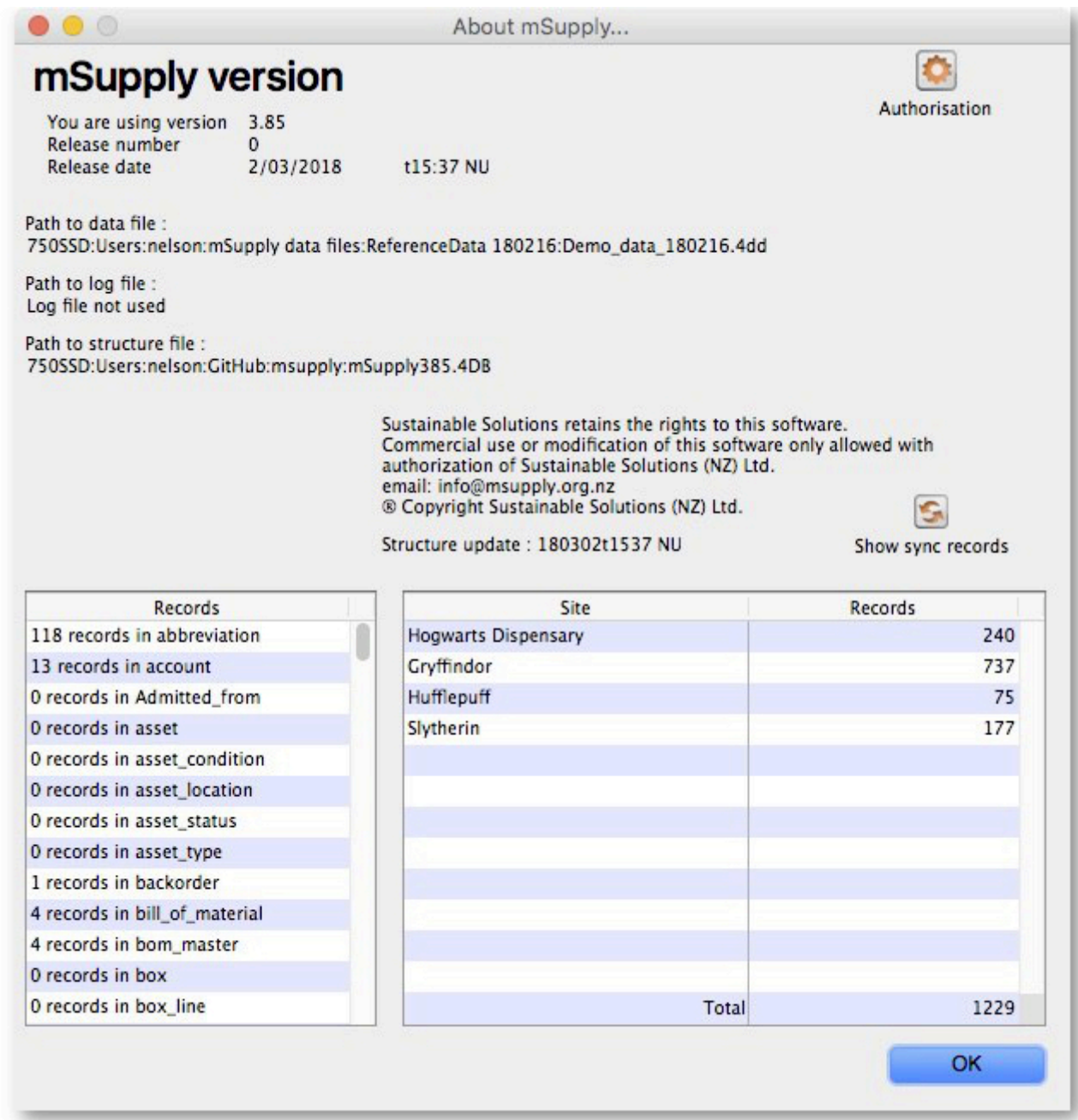
If you click the “2 arrows” icon it will initiate an immediate synchronisation and update the statistics on the number of records remaining as sync progresses.

On a remote site

If there are queued sync records, there will be a message at the bottom left of the navigator which shows the number of sync records in the queue. If this is not going down, there may be an entry in the log.

On the sync server

- Choose **Help > About mSupply**
- At the bottom left of the window there is a list of tables and the number of records in each table.
- Scroll the list to near the bottom, and you will see the number of records in the **sync_out** table.
 - If the number is zero, your copy of mSupply is up to date
 - If the number is growing from day to day, there are possible reasons:
 - you need to provide more internet time or faster internet
 - there may be a problem that needs the attention of Sustainable Solutions. Before contacting us, make sure the internet is connected for an hour, and see if the number is decreasing or not.



Setting up or extending a sync system

This is not something for end users to configure, so it's best left to the experts at Sustainable Solutions! However, there is a lot of preparation ground work that can be done beforehand:

1. Decide how to configure your server(s)
 - for a local combined primary and sync server:
 - can your local server be online most of the time (it is more important that the internet to be reliable than for it to be fast)?
 - have you a fixed external IP address?
 - can you open the necessary firewall ports to allow access to the local server from outside?
 - for a combined primary and sync server on the cloud:
 - is your local internet fast enough to support remote access to the cloud server to administer system data?

- otherwise, it's better to have a separate local primary server and cloud sync server
- 2. Do a site survey for all the proposed stores
 - how is the internet access and local network?
 - how reliable is the power supply?
 - is there a suitable location for mSupply?
- 3. Decide which version of mSupply is best for each store - don't worry, this can be changed later and licenses can be transferred
 - central primary server: mSupply server with local clients (depending on the number of users)
 - central sync server: mSupply server with local clients (depending on the number of users) and web server
 - multi-user central/district warehouse/busy dispensary: mSupply server with local clients (depending on the number of users)
 - single-user store/quiet dispensary (desktop): mSupply single-user desktop
 - small store/clinic: mSupply mobile
- 4. Decide on the hierarchy of the stores you want to include
 - which stores supply other stores?
 - can stores which have the same supplying store transfer to each other, or just with the supplying store?
 - for dispensary stores, do you need to see prescription details on the central server
- 5. Decide on the users for each site and their roles/permissions

Movings stores and sites



Misconfiguring of store or site settings can corrupt data across the synchronisation system. This should only be done by someone trained to do so and with guidance from the mSupply team

Moving a store from the central server to a new sync site

Use the [site wizard](#).

Moving a store from one sync site to another

To move a store from one site to another means to make it *not* **Active** on the 'From' site, and **Active** on the 'To' site. By default, mSupply will leave the store configured to maintain a full **Collector** copy on the 'From' site with all the associated sync traffic. This is not normally desired. Except for this process of determining which site a store is **Active** on, all sync settings are governed by [store visibility settings](#).



This process involves editing store sync settings which is dangerous. Editing store sync settings must happen on the



central server and is restricted (by password) to Sussol technicians. Please consult with us to coordinate this. The full process is documented here for your information.



- A mobile site can only have one **Active** store.
- Therefore, only one of the stores on a 'From' desktop site can be moved to a single mobile site.
- If another **Active** store on the 'From' desktop site needs to be moved to a mobile site, then it will need to be moved to another sync site, mobile or desktop.



If the 'To' store is the central server, then this same procedure applies

1. Ensure that both the 'From' site and the 'To' site (only relevant if it is a desktop site) are fully synchronised.
2. Ensure that no new data is entered on either site until the move is complete. Therefore, best to plan for this process to happen overnight or over the weekend...
3. On the central server, **Special** > **Stores** > double-click the store that is being moved > **Synchronisation** tab > **Click to un-lock**, enter code to edit (**Sussol technicians only**)
4. If the 'To' site is a desktop site that already exists, then make the store **Active** on the 'To' site by finding the 'To' site in the list and click on the **Local** checkbox.

Sync ID	User name	Sync type	Local
2	...	Transfer	<input type="checkbox"/>
3	...	Transfer	<input type="checkbox"/>
4	...	Transfer	<input type="checkbox"/>
5	...	Active/collector	<input checked="" type="checkbox"/>
6	...	Transfer	<input type="checkbox"/>
7	...	None	<input type="checkbox"/>
9	...	Transfer	<input type="checkbox"/>
12	...	Transfer	<input type="checkbox"/>
13	...	Transfer	<input type="checkbox"/>
14	...	Transfer	<input type="checkbox"/>
15	...	Transfer	<input type="checkbox"/>
16	...	Transfer	<input type="checkbox"/>
17	...	Transfer	<input type="checkbox"/>

5. If the 'To' site is the central server, or doesn't yet exist, make the store **Active** on the central

server by clicking on the **Set as local store** checkbox

Edit store

BarilluMIS

General Preferences Logo Synchronisation Custom fields Master lists

Synchronisation type: Active store

☒ Set as local store

Click to un-lock

Sync ID: 1

Sync with:

Search sync IDs, user names, and sync types

Sync ID	User name	Sync type	Local
2	BarilluMIS	Transfer	<input checked="" type="checkbox"/>
3	BarilluMIS	Transfer	<input type="checkbox"/>
4	BarilluMIS	Transfer	<input type="checkbox"/>
5	BarilluMIS	Active/collector	<input type="checkbox"/>
6	BarilluMIS	Transfer	<input type="checkbox"/>
7	BarilluMIS	None	<input type="checkbox"/>
9	BarilluMIS	Transfer	<input type="checkbox"/>
12	BarilluMIS	Transfer	<input type="checkbox"/>
13	BarilluMIS	Transfer	<input type="checkbox"/>
14	BarilluMIS	Transfer	<input type="checkbox"/>
15	BarilluMIS	Transfer	<input type="checkbox"/>
16	BarilluMIS	Transfer	<input type="checkbox"/>
17	BarilluMIS	Transfer	<input type="checkbox"/>

OK & F

6. Unless you are sure that you want a full **Collector** copy of the store to be maintained on the 'From' site (not normally desired), change the sync type for this store on the 'From' site to **Transfer**.
7. Click **OK** to save changes
8. Click **OK** to exit the stores list
9. If the 'To' site is the central server, skip to step 12.
10. If the 'To' site doesn't yet exist, use the [site wizard](#) to create the new sync site and move the store to it.
 1. If the 'To' site is a *new* desktop site, create the data file using [Sync site export](#) and [Sync site import](#).
 2. If the 'To' site is a *mobile* site, then get it initiated as discussed in [Installation of mSupply Mobile APK and initiation](#).

The store should now be visible on the on the new site, in which case it is safe to operate it.
11. If the 'To' site is an *existing* desktop site, then code needs to be run on the Central server to generate sync out records for that store - refer [Sussol internal reference](#).
12. If the 'From' site now has no stores on it (it was a mobile site or a desktop site with only one store on it), then the sync site can be safely deleted. (**Sussol technicians only**)



If you are moving the store from **Mobile** to **Desktop** or vice versa, this process will not change the [site type](#). As of 2020-10-02 this must be done by Sussol technicians only by use of the record browser.

Previous: **[26.02. Reminders](#)** | | Next: **[26.03. Transaction Status & Type Codes](#)**

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

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