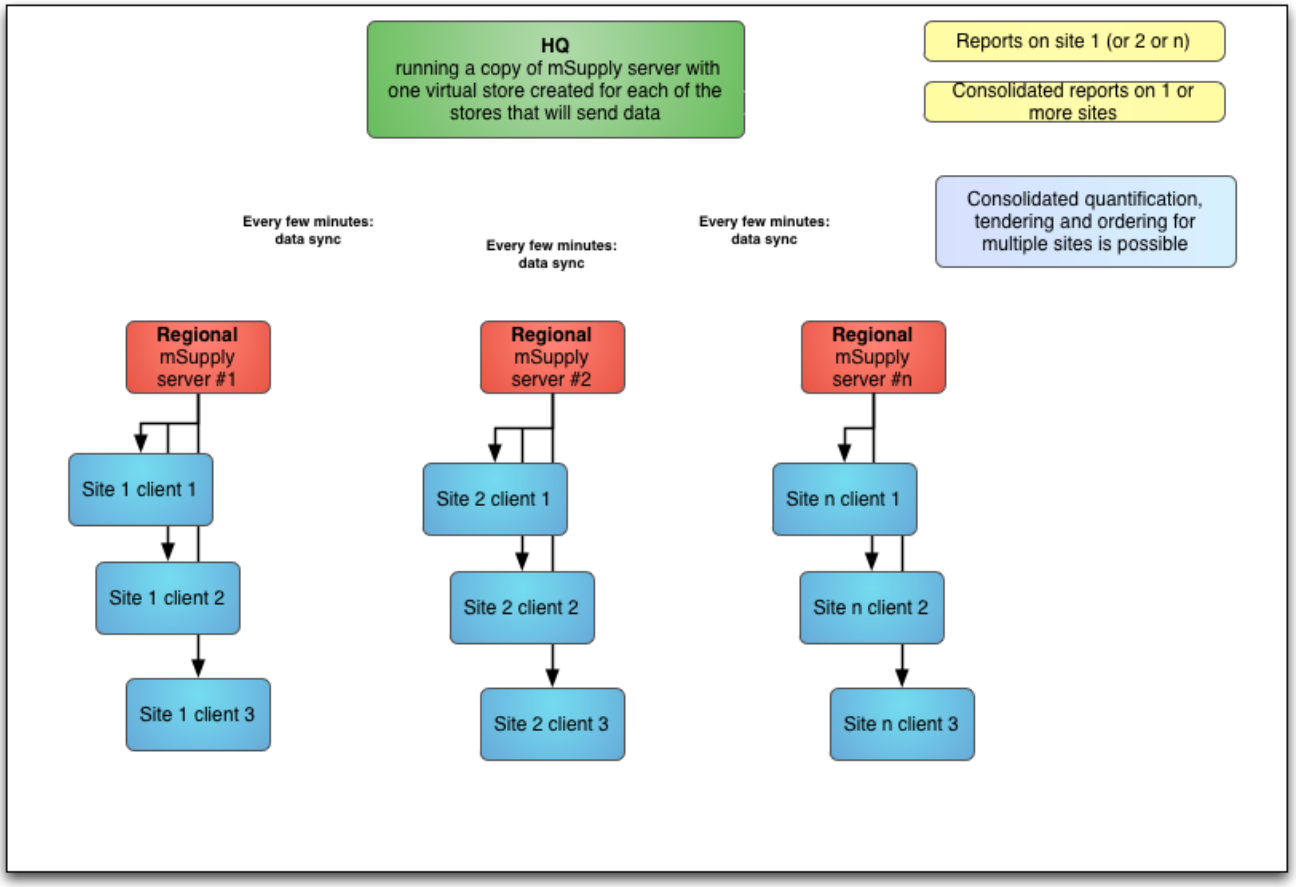
25.03. Remote synchronisation

Updated: mSupply Version 4.0.3 Updated: mSupply Version 4.12

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 ***central server*** (a.k.a. ***sync server***) is a central mSupply server. In any given setup, there will only be *one* central server, which must be running a *web server*, and it is responsible for:
  - aggregating the store data from all stores ⇒ enables centralised reporting, and a real-time backup
  - controlling how all of the stores sync with each other
  - routing transfers from one store to another
  - running the mSupply dashboard
- The ***primary server*** is a central mSupply server. In any given setup, there will only be **one**

primary server, and it is responsible for:
    - controlling the central data which is common across all stores e.g. names and items
    - controlling the store records themselves, their preferences and visibility in stores ⇒ all stores exist on the primary
- A ***remote site*** is any mSupply server, single-user standalone mSupply, or mSupply mobile instance which is *not the central server*:
    - the syncing process is initiated from each remote site on a schedule, and pushes its own updated records to the central server first, before pulling any updated records from the central server

- For most installations, the central server and the primary server are one and the same, but for ***mirrored*** systems (see Mirrored sync below for details) they can be different - in that case the primary server is just a special case of a remote site.
- The central server, and all of the 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*.

- Multiple copies of the same store can exist across multiple sites (see Store setup below for details), but they can have different store types on different sites:
    - each store is ***active*** on a *single* sync site, and that is where its own store data can be added, edited, and deleted
    - a ***collector*** copy of a store is a *full read-only copy* of the store - these will usually exist on the central server, and can be logged into and reported on
    - a ***transfer*** copy of a store is a *partial read-only copy* of the store - these exist on other sites where the store is visible, to enable the site's active store(s) to send and receive transfers

- To preserve data integrity, and to avoid potential clashes where more than one sync site tries to modify the same record, *only one sync site can edit/update any specific type of data*. There are some special cases (see Data types below for details), but most data falls into one of the following main types:
    - ***Central data*** (a.k.a. ***system data***) is common to all stores (e.g. suppliers, customers, items) - this can only be edited or imported on the primary server, and changes are synced to all sites
    - ***Central store data*** is data related directly to a store record e.g. store preferences and visibility - this can only be edited or imported on the primary server, but changes are only synced to the site where the store is *active*
    - ***Store data*** (e.g. transactions, stock, locations) can only be edited or imported on the sync site where the store is *active*, and changes are only synced to any site where the store exists as a *collector* copy (e.g. the central server)
    - ***Patient data*** (e.g. patients, PMR records, insurance policies) can only be edited on the sync site where its *home store* is *active*, and changes are synced to any site where the patient is visible

Mirrored sync

In a mirrored synchronisation system, the primary server becomes a remote site with responsibility for editing the central data:

- this remote site doesn't need to be online all the time, so that it can run operations for its own active stores and still be able to administer centrally-controlled data, without being a bottleneck for sync
- the central 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

The typical use case is where a site in a country that has the responsibility for administering items has poor internet (typically the Central Medical Stores), so that it either can't run the central server locally and/or can't reliably connect to a cloud-based central server. By using mirrored sync, this site retains authority, but a reliable central server elsewhere ensures that synchronisation with other sites is not hindered and that external users can still access the dashboard.

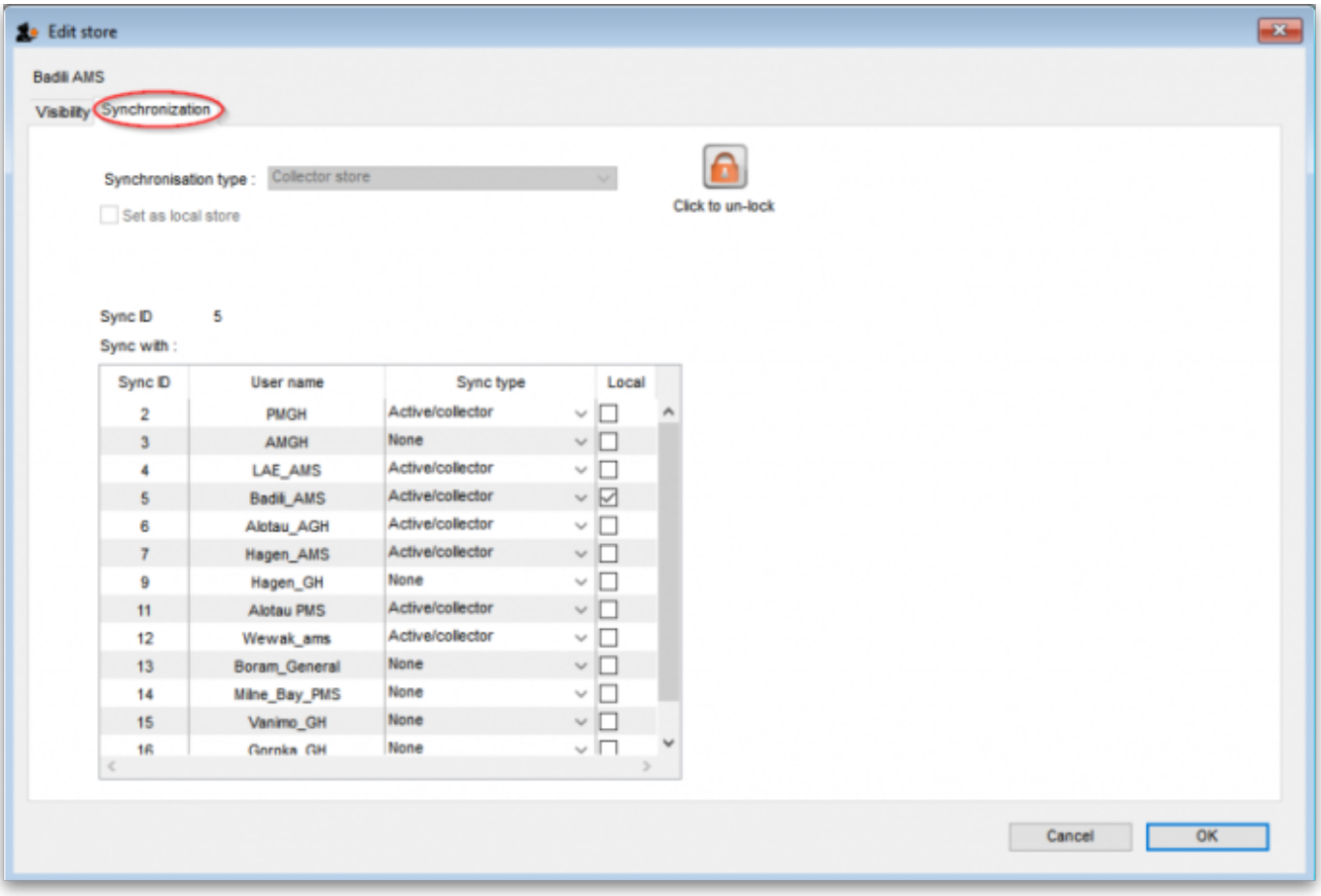
Store setup

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 central server - the store's sync preferences are editable ⇒ all stores must exist on the central server

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

- store 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 central server by the store preferences on the **Synchronisation tab** for each virtual store on each sync site:



Synchronisation type drop down list: Shows the sync type of the current store. Will be editable on the central 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 central 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. This preference is turned on by default for all stores and is permanently disabled (regardless of whether you have unlocked the settings using the **Unlock** button). It can only be turned off by Sustainable Solutions.

Resync patient records when store is saved checkbox: If checked, when you click the **OK** button to save the store's settings, the central server will resend all the patient records for patients visible in the store to the active copy of the store. Along with that, all the other dispensary related information that is required will be sent, such as patient medication records, prescribers, abbreviations, insurance providers, directions, prescription categories and diagnoses. Quite a lot of information 😉

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 central 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 *central server* - see Virtual stores, Controlling item visibility.
- To do that, once you log in to the central 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 logged into 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

Updated: mSupply Version 4.12

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

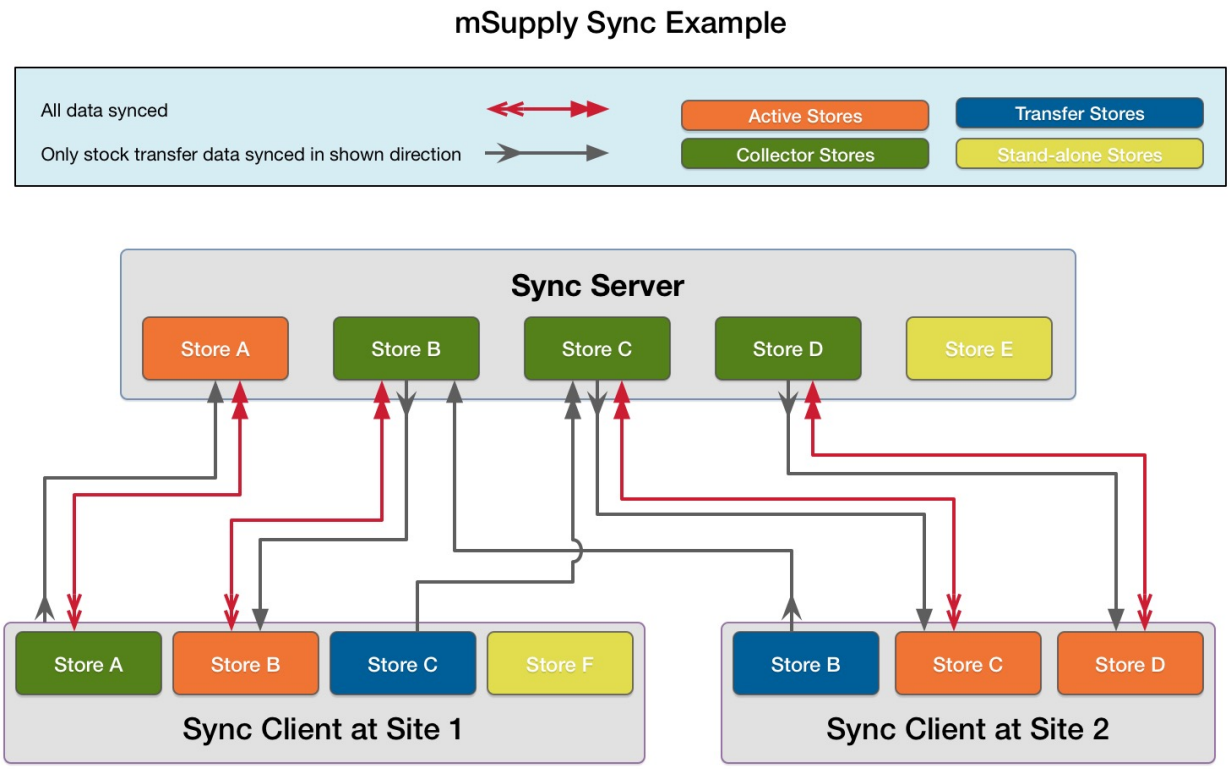
A value of ***None*** means that this store doesn't sync with the corresponding store on the selected sync site. That is, there is no instance of this store on that sync site. If a store is not visible to any stores *active* on the selected sync site, or its visibility settings are changed so that it becomes invisible to all *active* stores on the selected sync site, then it will automatically be set to ***None*** for that 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* (on the site with matching sync ID) or *collector* (on any other sites). A store cannot be a collector on the selected sync site unless it is visible to at least one other store which is active on the site.

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*. If a store's visibility settings are changed so that it becomes visible to any other stores which are active on the selected sync site, then it will automatically be set to ***Transfer*** for that site.



- In a standard (non-mirrored) setup, the sync server is *both* the primary server *and* the central server
- In a mirrored setup, the sync server is *only* the central server - the primary server is one of the remote sites, except that:
    - it can also control central data
    - like the central server, *all* stores must exist

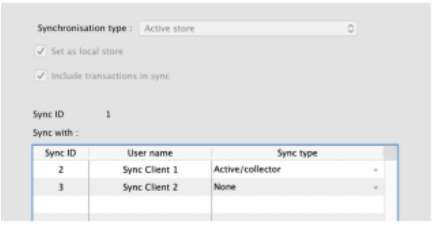
Store A

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

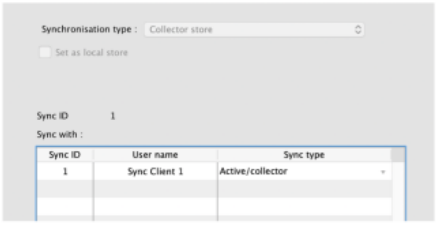
Store A exists as an *Active store* on **sync server** and as a *Collector store* on **remote site 1**:

- 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



Remote site 1 settings for Store A



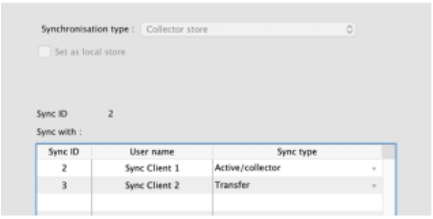
Store B

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

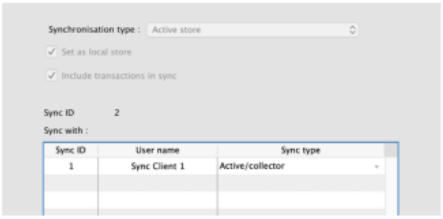
Store B exists as a *Collector store* on **sync server**, an *Active store* on **remote site 1**, and a *Transfer store* on **remote site 2**:

- 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**.

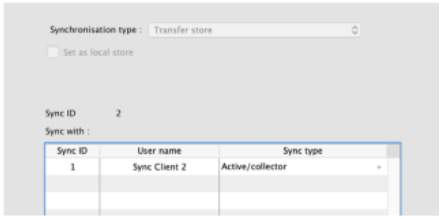
Sync server settings for Store B



Remote site 1 settings for Store B



Remote site 2 settings for Store B



Store C

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

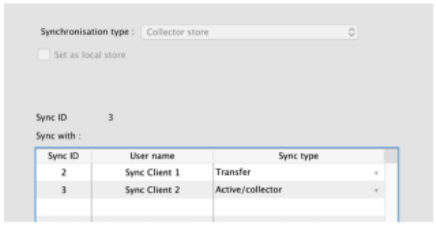
Store C exists as a *Collector store* on **sync server**, an *Active store* on **remote site 2**, and a *Transfer store* on **remote site 1**:

- 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**).

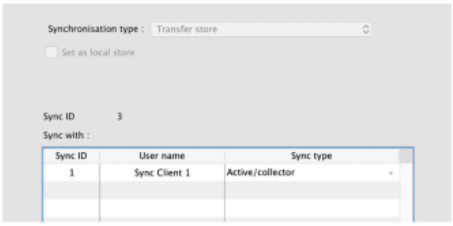
These are then synced to **remote site 2**.

- 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**.

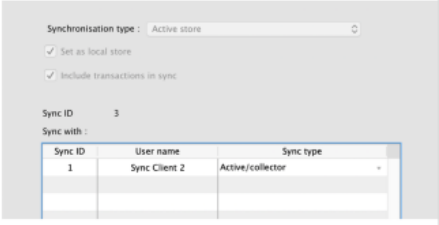
Sync server settings for Store C



Remote site 1 settings for Store C



Remote site 2 settings for Store C



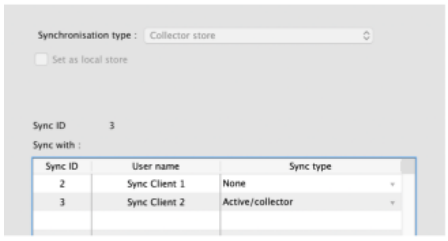
Store D

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

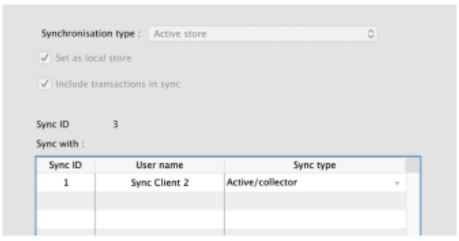
Store D exists as an *Active store* on **remote site 2** and as a *Collector store* on **sync server**:

- 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



Remote site 2 settings for Store D



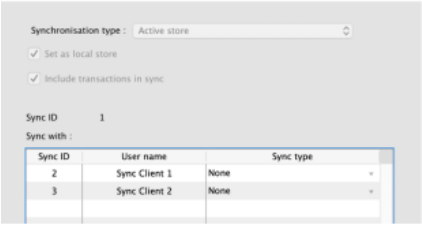
Store E

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



Remote site settings

None

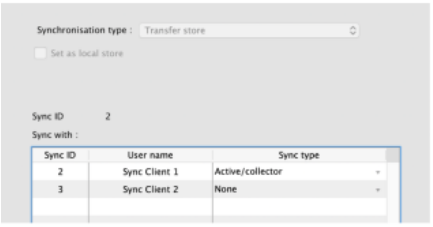
Store F

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

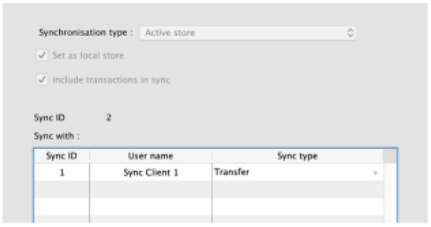
Store F exists on **remote site 1**, but it must also exist on the **sync server** (and **primary server**, if different) as a *Transfer store*, so that it can be centrally managed:

- 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



Remote site 1 settings for Store F



Data types

The table below is a high-level summary of the different data types:

- ***Central data*** can only be edited or imported on the primary server, and changes are synced to all sites
- ***Central store data*** can only be edited or imported on the primary server, but changes are only synced to the site where the store is *active*
- ***Store data*** can only be edited or imported on the sync site where the store is *active*, and changes are only synced to any site where the store exists as a *collector* copy (e.g. the central server)
- ***Patient data*** can only be edited on the sync site where its *home store* is *active*, and changes are synced to any site where the patient is visible
- ***Local data*** can be edited or imported on any site but doesn't sync anywhere
- ***Sync data*** can only be edited on the central server but doesn't directly sync anywhere
- ***Message data*** can be edited on any site and syncs according to the sending/receiving store
- Some data can fall into more than one type, depending on the situation.

Data	Type	Notes
Items	Central	Including item-related data e.g. item categories, units, BOM masters
Names (except patients)	Central	Including name-related data e.g. name categories, contacts, tags
Merging of items, units and names (except patients)	Central	
Groups and departments	Central	
Item master lists and programmes	Central	
Budgets, periods and accounts	Central	
Transaction categories and payment types	Central	
Purchase order categories	Central	
Custom data	Central	
Barcodes	Central	
Currencies	Central	
Options and properties	Central	
Location types	Central	
Regimens and indicators	Central	
Drug interactions and warnings	Central	
Abbreviations and item directions	Central	Dispensary data
Diagnoses	Central	Dispensary data
Insurance providers	Central	Dispensary data
Patient event types	Central	Dispensary data
Vaccinators and vaccine settings	Central	
Custom reports	Central	Standard reports are regenerated on each upgrade
Asset settings	Central	
Sites and sync-related preferences	Sync	Changes on the central server indirectly update related records on remote sites
Dashboard reports	Sync	
Messages	Message	Depends on sending and/or receiving store (which can be blank)
Stores and non sync-related store preferences	Central store	
Purchase orders (centralised)	Central Store	
Payments (centralised)	Central Store	
Visibility of items and names (except patients)	Central store	
Visibility of existing patients and prescribers	Central store	
Visibility of new patients and prescribers	Patient	New visibility records sent to central server
Patients and prescribers	Patient	Including patient-related data e.g. PMR, insurance policies
Merging of patients and prescribers	Patient	
Repeats	Patient	Dispensary data
Patient events	Patient	Dispensary data
Name notes	Store	
Customer stock history and requisitions	Store	
Locations	Store	

Data	Type	Notes
Merging locations	Store	
Stock and replenishments	Store	
Stocktakes and inventory adjustments	Store	
AMC projections	Store	
Transactions and prescriptions	Store	Including other transaction-related data e.g. backorders, builds
Transaction notes	Store	
Item notes	Store	
Boxes	Store	
Goods received	Store	
Indicator values	Store	
Vaccine monitors/sensors	Store	
Assets	Store	
Store credentials	Store	
Authorisers and authorisation	Store	
Purchase orders	Store	Except for centralised procurement or supervisor-mode ordering
Payments	Store	Except for centralised payments
New users	Store	New user records sent to central server
User licenses and existing users	Local	
User permissions	Local	
Preferences (non-store)	Local	Except for a few special cases which are explicitly synced
Tenders and quotes	Local	
Incoterms and tender conditions	Local	
HIS	Local	
Drug registration	Local	
Labels	Local	
Logs	Local	
Reminders	Local	
Adverse drug reactions	Local	

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 remote (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 requistion
        - 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 subsquent 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

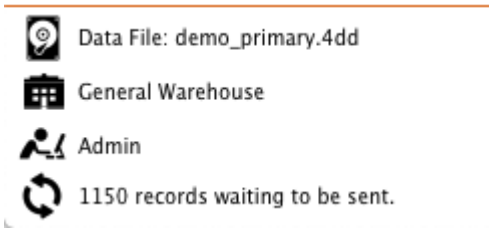
- On the sync server if you login in supervisor mode, you can then run reports on one or more stores. The reports can answer questions such as:
  - How much stock on hand of item X (or all items) are there at each location?
  - What is the value of stock on hand across the whole system?
  - How many 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



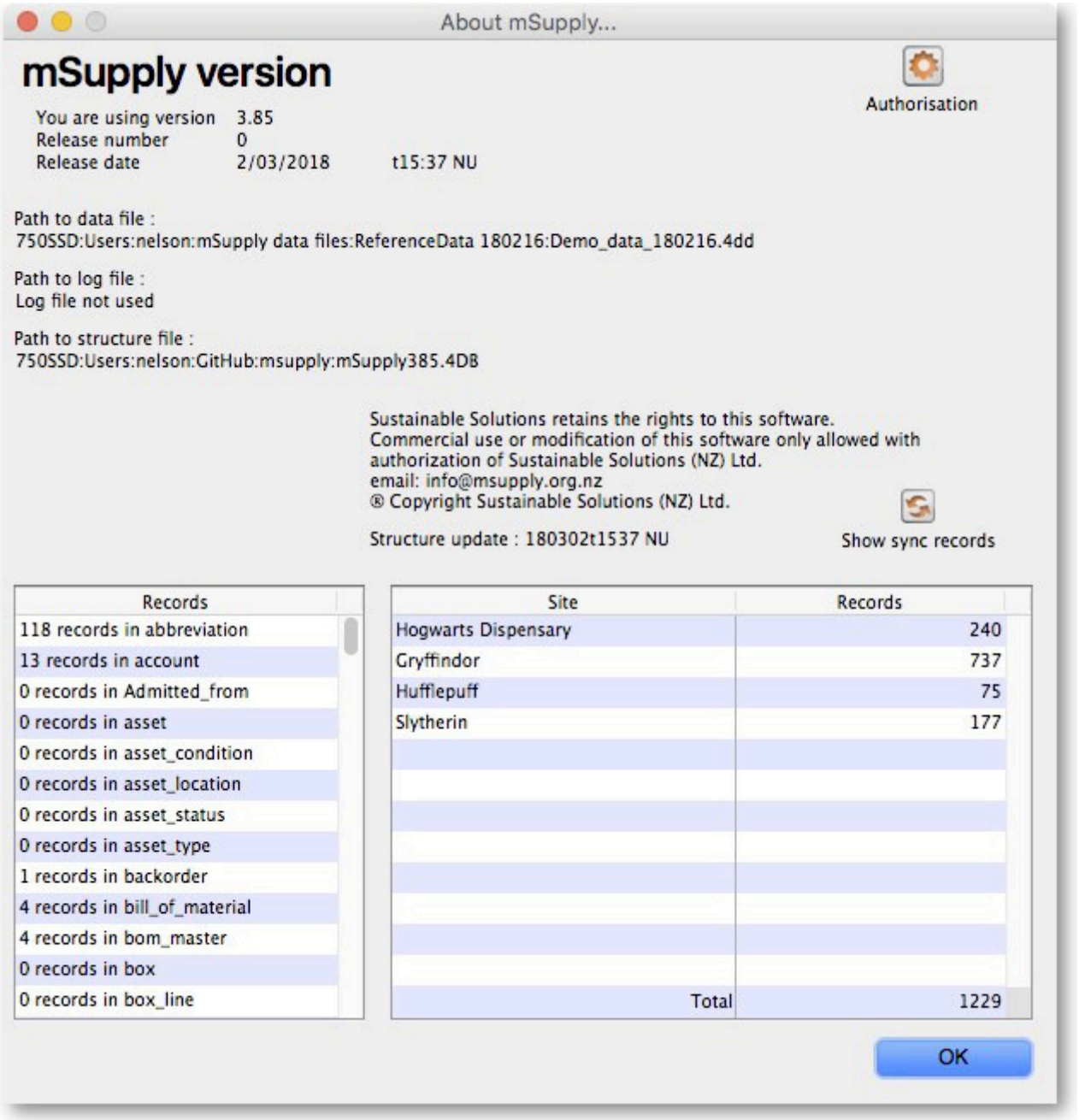
If you click the “2 arrows” icon it will initiate an immediate synchronisation and update the statistics on the number of records remaining as sync progresses.

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 heirarchy 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

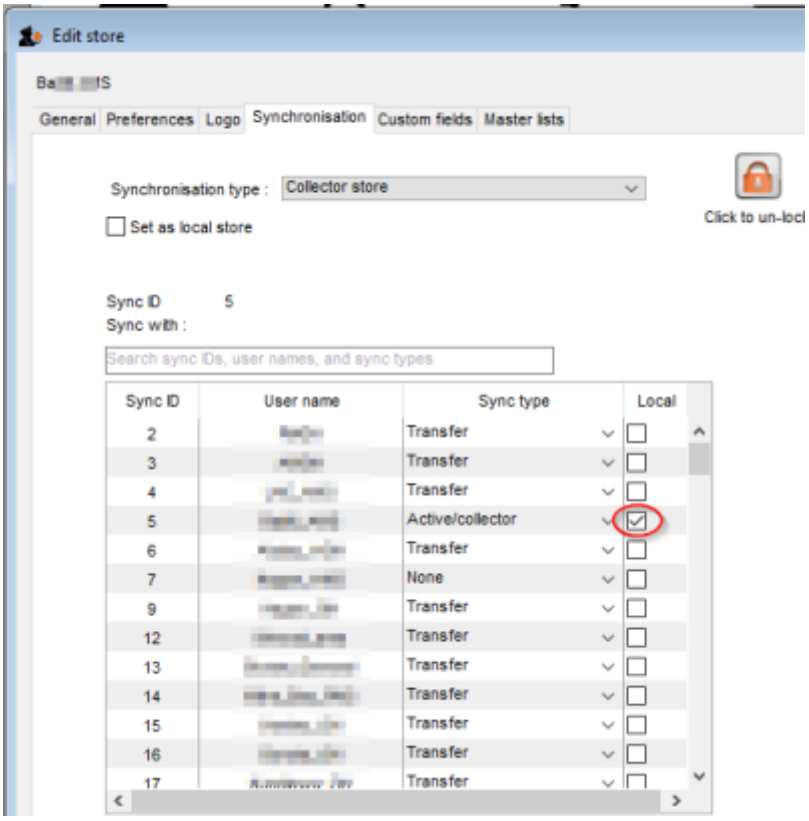
To move a store from one site to another means to make it *not* **Active** on the 'From' site, and **Active** on the 'To' site. By default, mSupply will leave the store configured to maintain a full **Collector** copy on the 'From' site with all the associated sync traffic. This is not normally desired. 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.

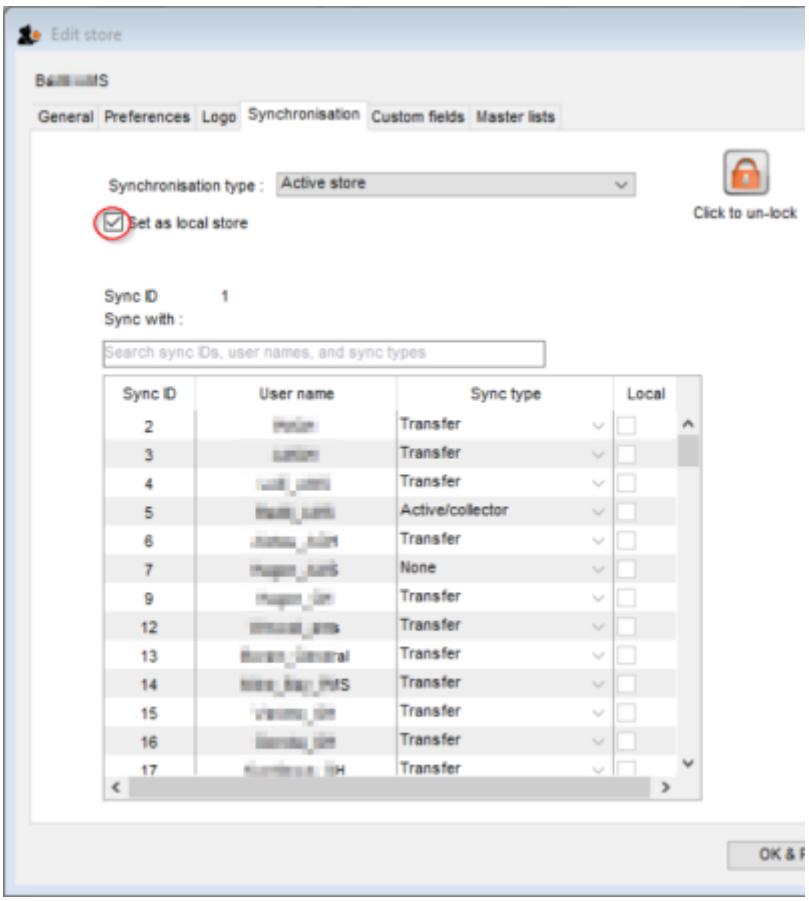
- A mobile site can only have one **Active** store.
- Therefore, only one of the stores on a 'From' desktop site can be moved to a single mobile site.
- If another **Active** store on the 'From' desktop site needs to be moved to a mobile site, then it will need to be moved to another sync site, mobile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



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



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** of 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** //

From:
https://docs.msupply.org.nz/ - **mSupply documentation wiki**

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