## Setting up mSupply Mobile - Server side

The following details the steps of setting up mSupply from your organisation's mSupply Server

Note - the mSupply Support Team will complete these steps for you.

The following instructions are for your information only.

As of 2019-10-24, this process is largely manual, with sync sites and stores needing to be created by an operator, oneby-one with a few small bits of code to make some of these processes quicker and more reliable. There is a plan to develop a tool by which virtually all of the process can be automated. Even with such a tool, *at least* the following information will need to provided manually:

- Store name
- Customer name from which the store is being created (normally the case)
- · Item master list controlling visibility for the store

### Requirements

- A server running mSupply with a web server license registered
- Sync server has a static IP and any network permissions required configured
- A mobile tablet fitting the recommended specifications here

## **General approach**

**EACH** mobile store needs to have these:

- 1. Create sync site
- 2. Create and configure store
- 3. Create User(s) to access the stores.



If the stores being created from existing customers in an existing mSupply system, then an additional step needs to be carried out: Merge the existing customer name with the new store. There is some footrunner code that can facilitate this for multiple sites - see 2. Create store from existing customer name using store\_create\_from\_name, below.



**However**, Any unfinalised CIs from supplying stores to these existing customers need to be finalised first. On a system with supplying stores on multiple sync sites, this can take a long time. Start early, and if possible, ask the supplying stores to refrain from creating new CIs until the merging is done...

If you try to do the merge before finalising unfinalised customer invoices, you will get an error message, and as that message indicates, the merge will not proceed:



## **Create Sync Site**

The first step is to create the sync site that the store will be 'Active' on.



1. Got to Admin > Preferences

Customer	Suppliers	Litem.	Reports	Offo	Admin
	(Å)	3	Ð		
	Check for up	lates Edit	users	View log	
		Preferences	Backup		
Constant Second day	. 17017 44				
General Warehouse	)	mSu	pply	1	

2. On the Synchronise tab on the left-hand side and click on the unlock button and enter the password

General			
Misc			
Purchase order defaults	Click to un-lock		
Purchase order 2	· Construction of the		
Invoices 1	Synchronize parameters		
Invoices 2	Sync ID 1	Sync time interval 5	
Item			
Price			
Quotes	Sync with		
Reports	Sync ID	User name	(T)
Names	7	General	
Tender	6	Hogwarts Dispensary	100000
Reminders	2	Gryffindor	-
Patient Medication	-	Hifferst	1110-000
Drug Interactions		States -	
Drug registration		siymerin	
Printing	5	Mobile Store 1	
OK and print			
Logo			
Dispensary mode			
HIS	K		
Log	Clear database		
Backup	Cite General		
Backup 2			
Email			
Server			
Synchronise			
Customization			Cancel OK

- 3. Add new Sync Site
- 4. Enter Sync ID, User name and Password. Note that URL and Hardware ID are not required.

se Add/edit synchroni	ze paramet		$\times$
Add/edit synchronize p	arameters		
Sync ID	40102		
User name	GORDONS UC		
Password	performance.		
URL			
Hardware ID			
	Cancel	OK	

#### 5. Click **OK**



- Keep track of the password! If it is lost you'll have to resynchronise from scratch!
- Sussol will typically have them securely stored if Sussol has done the sync setup.

# Create and configure store that will be operated on the mobile device

After the sync sites have been set up, there are three approaches to creating and configuring the store that will operated on that site.

- This can be done 'manually' as described in the first method below. This method is suitable if you are creating only a handful of stores.
  - If you are creating a larger number of stores, then it is more appropriate to use one or both of the two footrunner code methods. As of 2019-10-24 there are two pieces of footrunner code that can expedite this process see Creating data files for multiple new remote sites. They can *not* be used together for the same store, but it may be appropriate to use store\_create\_from\_name for creation of one store, and then use sync\_clone\_sync\_site to create subsequent stores.

#### 1. Manually create store

1. On mSupply desktop go to **Special > Stores > New Store** 





2. Enter the Store Code and the Store Name

		_			
		General	Preferences	Logo	Syncl
Store code	mobilestore	store		0	
Name	Mobile Store 1				
Organization name					
Address line 1					
Address line 2					
Address line 3					
Address line 4					
Address line 5					
Postal/Zip Code					
<ul> <li>The</li> <li>The</li> <li>The</li> <li>will r</li> <li>Mobination</li> <li>to us</li> </ul>	Store Code ca Store Name n recognise. ile Store 3 se.	an not includ eeds to be 1 is not likel	de spaces something y to be a ge	that us ood nai	ers me

- 3. Configure items visibility for the store
- 4. Configure synchronisation settings
- 5. Configure store visibility to other stores

#### 2. Create store from existing customer name using store\_create\_from\_name

Use the footrunner code store\_create\_from\_name. This method is only useful if you already have a customer and you want to convert it to a store.

- 1. Run store\_create\_from\_name to clone the original store. You will need to provide:
  - 1. Name **ID** (not name **Code** ) to create the store for (must not be blank or already a store)
  - 2. Store mode for new store (one of store, dispensary or report). Almost always, this should be store
  - 3. Sync ID for site on which the new store will be Active (optional; if left blank, will default to the current site ID)
- 2. Configure items visibility for the store
- 3. Configure synchronisation settings
- 4. Configure store visibility to other stores

#### **3. Create store by cloning another sync store using sync\_clone\_sync\_site**

Use the footrunner code sync\_clone\_sync\_site. Under this method:

- 1. Manually create and appropriately configure a single store.
- 2. Make *sure* the relevant sync sites have been created (above) and then, for **EACH** store:
- 3. Run sync\_clone\_sync\_site to clone the original store. You will need to provide:
  - 1. Sync ID for source sync site
  - 2. Sync ID for clone sync site
  - 3. sync version (v1 for desktop, v3 for mobile)
  - 4. Decision on whether the cloned store will have 'group' store visibility (visible to all other stores with the same supplying store) or not
  - 5. Decision on whether to also clone locations, transactions, stock, requisitions. (almost always **NO**!)
  - 6. new **store** code *and* name for each cloned store
  - 7. new **user** name *and* password for the each cloned store's default user
- 4. If there are actually existing customers for each of these stores, you will need to merge the existing customer name with the new store
- 5. The store will have the same item visibility configuration as the store that has been cloned. Review, and if necessary, Configure items visibility for the store
- 6. The store will have the correct 'basic' sync settings. Review, and if necessary, Configure synchronisation settings
- 7. The store will have the correct 'basic' store visibility settings, including, if you have selected it, 'group' store visibility. Review, and if necessary, Configure store visibility to other stores

#### Making items visible to the new store according to a Master List

1. Click on the Master Lists tab and select at least one Master List.



- 2. Click **OK**
- 3. Click OK again

#### Setting up correct synchronisation settings

If you have used <u>store\_create\_from\_name</u> for creation of the store, and you have specified the sync site that the store will be **Active** on, then all you need to do here is:

- Change the Synchronisation type for this store on the Primary Server to **Collector** if so desired (normally the case)
- Configure this new store's Sync type to be Transfer or Active/Collector for any other sync sites that need to deal with this store.
- Edit store synchronisation settings (Special > Show Stores > Double-click on store > Synchronisation > Click to Unlock, enter code to edit):
- In the table below, in row of the Sync site that was created for this store, tick the tickbox in the Local column. This will automatically change the Sync type for that site to Active/Collector.

Set as lo	ocal store		-	-	Click to un-lock			
Include	prescriptions in sync							
Sec. 15								
Sync ID Sync with :	3							
Sync ID	User name	Sync type	-	Local	1			
7	General	None			1			
6	Hogwarts Dispensary	None		Ol				
2	Cryffindor	None	•	n i				
3	Hufflepuff	None						
4	Slytherin	None		0				
5	Mobile Store 1	Active/collector						
				_				

- 3. Set **Synchronisation type** at the top to Collector
- 4. Click **OK**

#### Configure visibility to other stores

1. Edit the 'name' associated with the store and configure visibility to other stores appropriately

## Setting up User Access to the store

Unlike mSupply Desktop, mSupply Mobile does not need or use individual user permissions for the various activities within the store. All that is required is for the user to have login rights to the store.

#### Setting up Store User Access



At least one store user needs to be set up to have have access to the new store on the Primary server. Even though the user will access the store from the device, their credentials need to be set up on the Primary server - refer managing users.

For convenience when using a tablet:

- Only use lower-case letters for both username and password
- Consider using short usernames and passwords

#### Setting up admin User Access

At least one admin user needs to be set up to have have access to the new store on the Primary server. This user will normally be the Sussol user that has set up the new store, but there could well be other local administrators that need access.

#### 1. Go to **Admin > Edit Users**

Customer	Suppliers	and the second s	Reports	OffO Special	Admin
	('🏠') Check for upo	Jates Edit	Disers	View log	
		2	<u></u>		
		Preferences	Backup		

#### 2. Select the user and go to Login Rights

	General	Permissions	Permissions (2)	Permissions (3)	Login rights	Details Dashboar	d
Name		ls di	abled	Default store		Can login	
Drug Registration		1				- 0	
General Warehouse							
Gryffindor District Sto	re	(		D			
Hogwarts Dispensary							
Hospital Info System							
Hufflepuff Health Cent	re						
Mobile Store 1		1					
Slytherin Health Centr	ė	1		D			
Supervisor- All stores			5	Ō		0	

- 3. Select the new Store
- 4. Click OK

## Verify that the store is working

On the Primary server, log in to the Store (File > Switch) (or 'cmd 2' (apple) or 'ctrl 2' (windows))



2. Check that the right items are visible

#### Start the web server

Sync will not start until you have started the web server!

#### **Related Links**

• mSupply mobile user guide

Return to: mSupply Mobile Home page



mSupply Foundation Documentation - https://wiki.msupply.foundation/

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