

# Excel report e-mail scheduler - End-user instructions

## Description

The Open mSupply Dashboard Excel report e-mail scheduler plugin which takes data from panels of mSupply dashboard to generate excel reports.

The reports are then emailed to a custom user report group, this report group is curated from the list of mSupply users, pulled from mSupply Dashboard's datasource.

The timing of the scheduler can be set in the plugin.

## How to use

We are giving certain authorised personnels, admin access to dashboard so that they would create report groups and schedules. Other normal users would not be able to access this plugin page and hence would not see it in their dashboard interface.



Since admin access has been granted, the authorised personnel would also get access to other features in the dashboard that normal users would not have access to. We strongly warn the users to only make changes in the plugin pages, and do so carefully. Although we try to take backup of data as much as possible, if something break, it would be some extra work to revert the dashboard back to normal.

If you can see the Excel report e-mail scheduler plugin icon, you have the rights to create report groups and schedules.

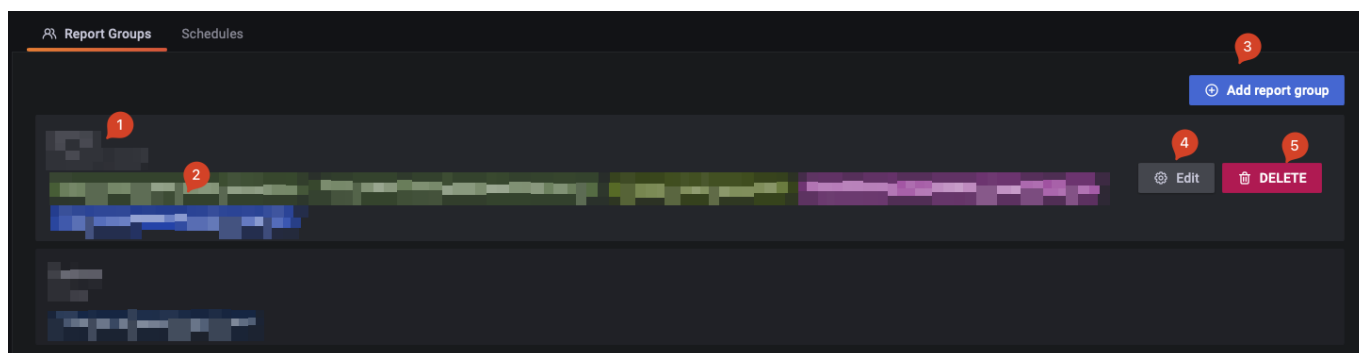




User email is the most important and essential information the Report group keeps so we can only select users with email address.



The email address is used to send scheduled report so make sure you only select users you want certain reports to be sent to.



## 1. Name and description

The name of the report group.

This name would be selectable while creating a schedule so please give it some meaningful name, like the common designation of the users e.g. Admin, Trainees.

## 2. Emails in the group

This section shows the list of emails in the report group.

These are emails/users the report would be sent to, when a schedule that has this report group set, triggers.

## 3. Add report group

Create new report group.



- You can search for specific user if the list is long.
- Only users who have an email address can be included since the goal of the report group is to send specific emails all of the users in the group.

## 4. Edit report group

Button to edit existing report group.

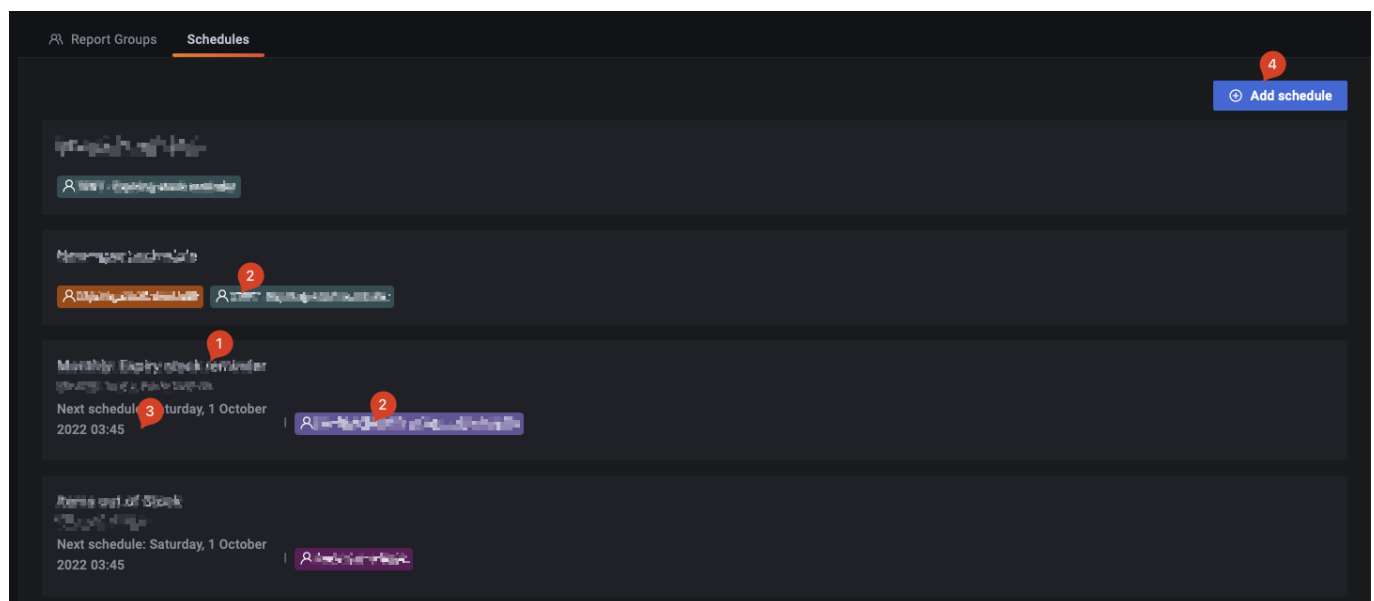
## 5. Delete report group

Button to delete existing report group. This would permanently delete the report group.

## Schedule

Schedules are schedules set by admins. It will run on set time on a daily daily, weekly etc. schedule.

Admin can select report group to send emails to and can select Grafana dashboard panels from which data would be extracted. The panels data are then converted into Excel file and emailed to the members (email address) of the report group.



### 1. Name and description

The name and description of the schedule. Please give it some meaningful name.

### 2. Selected Panels

The list of Panels selected for this schedule, these are the panels from which data would be extracted and sent to users in Report group.



[illegible]





## 8. No checkbox

If you see a panel in the list but do not see a checkbox in front of it, the variables and lookup the panel uses are not supported. Therefore it would not be selectable even if the panel type is table.

**Ask somebody for the mSupply support group to maybe update the panel settings to fix this.**

## 9. Variables

This is where you would customise the panel variables.

Some panels allow you to filter the data by some variables. For instance you can only ask the plugin to build the excel report from certain stores. To do that you can go to Store variable list and select the stores you want the data to be filtered by.



Variables can be text boxes, drop-downs and drop-downs with multi-select option.

The variables you apply here will filter data based on the variable. So if you select certain item in the variable list, only that items' data would be shown in the report email.

Leaving the variable blank will select all as the option.

From: <https://wiki.msupply.foundation/> - mSupply Foundation Documentation

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