

Excel report e-mail scheduler

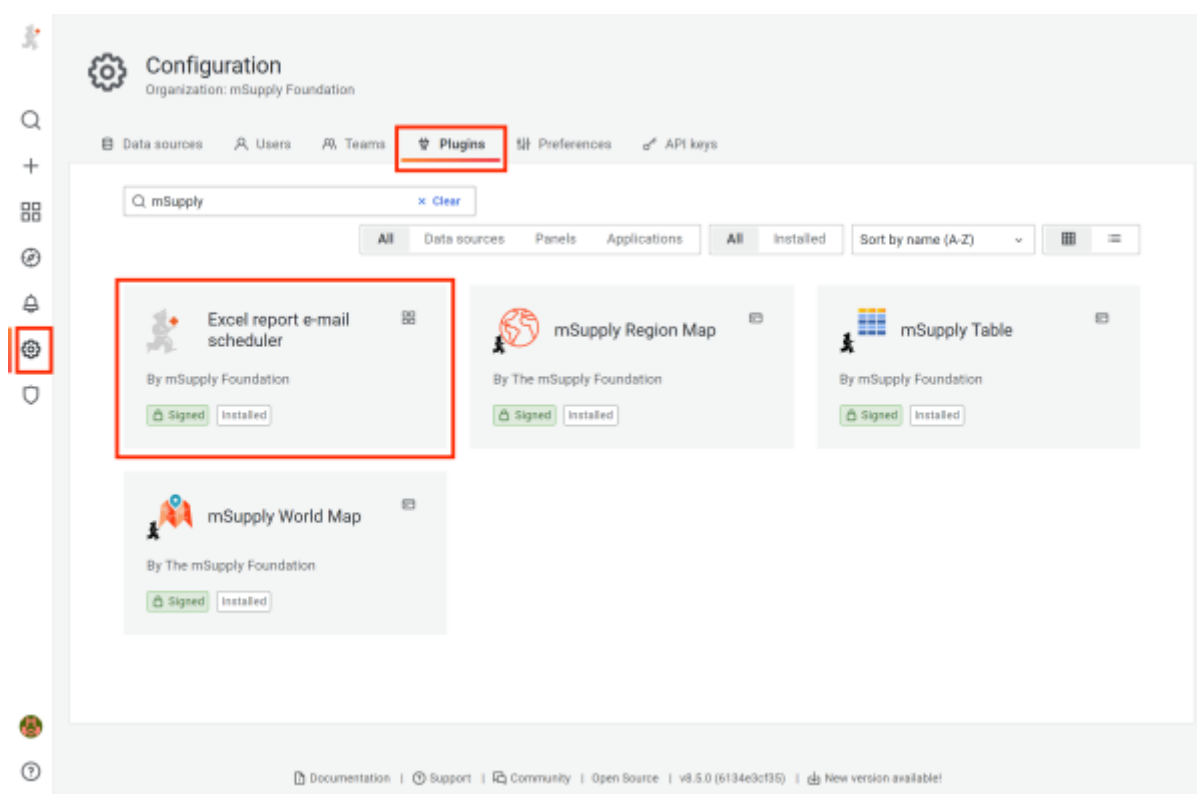
Generate Excel reports from mSupply dashboard. Send the reports to custom created user-groups on pre-defined schedule. Supported Grafana version is later v8.0.0

This is a custom plugin which will need to be installed on your server. Contact mSupply support if this plugin is not available to you.

NOTE: you need to have Grafana administrative rights to set up and use this plugin. The plugin icon does not show in the sidebar for non-administrative accounts.

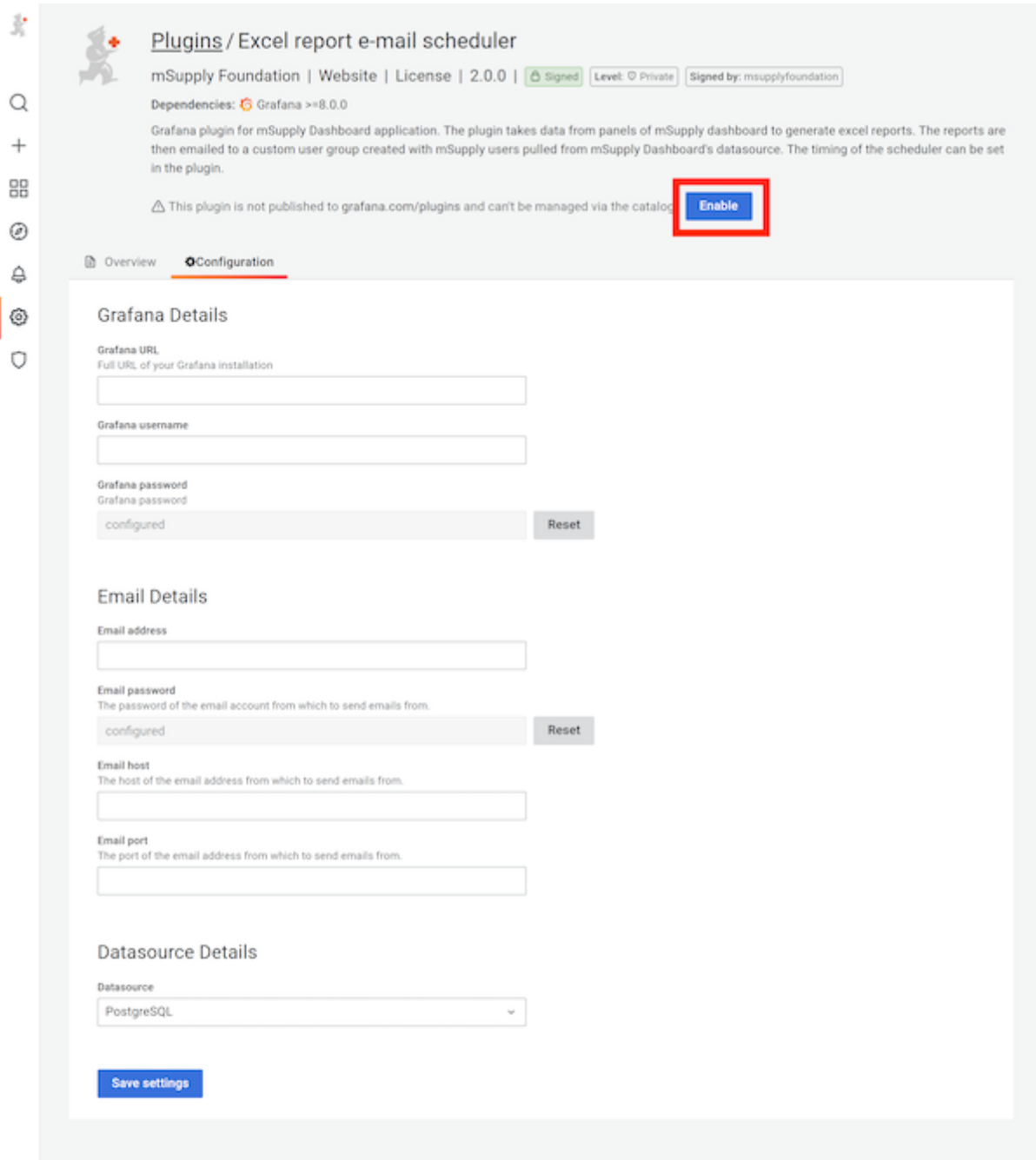
Initial Plugin Setup

1. Click on **Settings** on the sidebar menu (on the left-hand side of the mSupply Dashboard).
2. Select the **Plugins** tab.
3. Search for “mSupply”.
4. Click on **Excel report e-mail scheduler**.



The App Configuration window will open and you will need to complete this form before you start to use the reporting functionality.

Click Enable for the plugin.



The screenshot shows the 'Plugins / Excel report e-mail scheduler' page in the mSupply Foundation interface. The page header includes the mSupply Foundation logo and navigation links: 'Website | License | 2.0.0 | Signed | Level: Private | Signed by: msupplyfoundation'. The plugin details section shows dependencies on Grafana >=8.0.0 and a description of the plugin's functionality. A red box highlights the 'Enable' button. Below the plugin details, the 'Configuration' tab is active, showing sections for 'Grafana Details', 'Email Details', and 'Datasource Details'. The 'Grafana Details' section includes fields for 'Grafana URL', 'Grafana username', and 'Grafana password' (configured). The 'Email Details' section includes fields for 'Email address', 'Email password' (configured), 'Email host', and 'Email port'. The 'Datasource Details' section includes a dropdown for 'Datasource' set to 'PostgreSQL'. A 'Save settings' button is at the bottom.

Plugins / Excel report e-mail scheduler

mSupply Foundation | Website | License | 2.0.0 | **Signed** | Level: Private | Signed by: msupplyfoundation

Dependencies: Grafana >=8.0.0

Grafana plugin for mSupply Dashboard application. The plugin takes data from panels of mSupply dashboard to generate excel reports. The reports are then emailed to a custom user group created with mSupply users pulled from mSupply Dashboard's datasource. The timing of the scheduler can be set in the plugin.

⚠ This plugin is not published to grafana.com/plugins and can't be managed via the catalog **Enable**

Overview **Configuration**

Grafana Details

Grafana URL
Full URL of your Grafana installation

Grafana username

Grafana password
Grafana password

configured **Reset**

Email Details

Email address

Email password
The password of the email account from which to send emails from.

configured **Reset**

Email host
The host of the email address from which to send emails from.

Email port
The port of the email address from which to send emails from.

Datasource Details

Datasource

PostgreSQL

Save settings

Once enabled, the mSupply icon will be displayed on the sidebar menu above the settings button.

Plugins / Excel report e-mail scheduler

mSupply Foundation | Website | License | 2.0.0 | Signed | Level: Private | Signed by: msupplyfoundation

Dependencies: Grafana >=8.0.0

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⚠ This plugin is not published to grafana.com/plugins and can't be managed via the catalog. Disable

Overview **Configuration**

Grafana Details

Grafana URL
Full URL of your Grafana installation

Grafana username

Grafana password
Grafana password

Email Details

Email address

Email password
The password of the email account from which to send emails from.

Email host
The host of the email address from which to send emails from.

Email port
The port of the email address from which to send emails from.

Datasource Details

Datasource
PostgreSQL

Save settings

Please enter your administrator **Grafana Details**:

- Username and password
- URL for your mSupply Web Dashboard

Please enter the **Email Details** for the account from which emails will be sent:

- Email address and password
- Email host and port (from your email provider: this will be the same details that you would enter when creating a new email account)



Your email provider's security settings may require additional steps to allow email setup.

For **Datasource**, please select the source location for your mSupply data. In most cases this will be *PostgreSQL*. If you are not sure, please check with your mSupply consultant.

Once completed, please select **Save settings**.

- If the form is incomplete or the information provided is incorrect, you will receive an error message on submission. Please follow the instructions given in the error message.
- On successful submission, you will receive the following message:

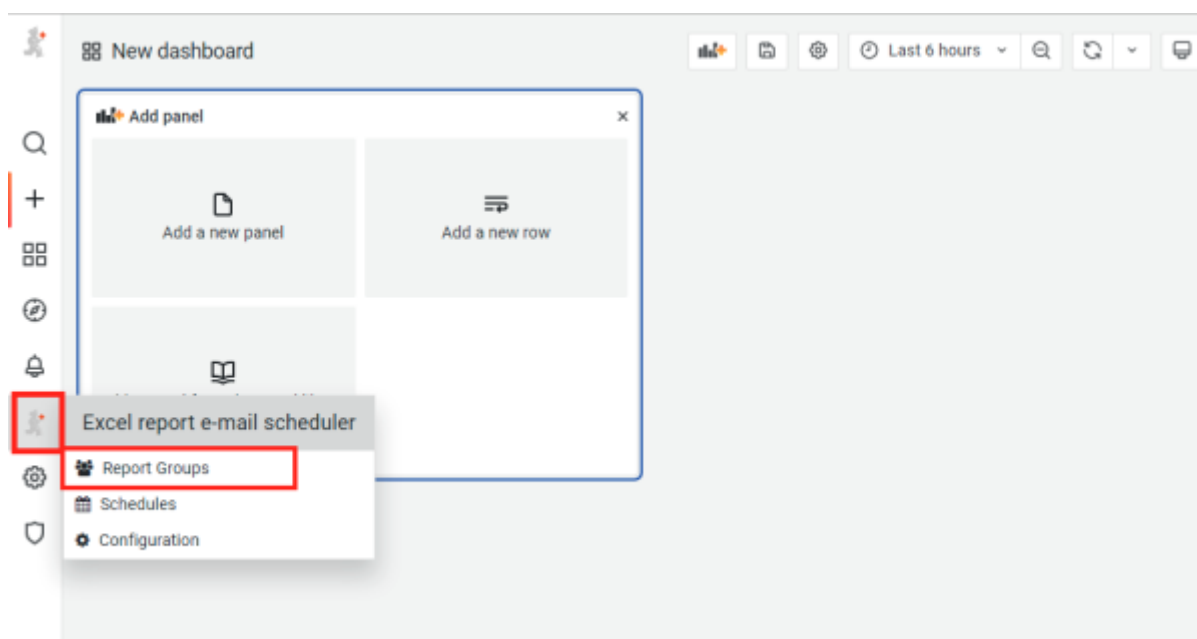


Selecting **Disable** will deactivate the mSupply plugin and you will need to repeat the above in order to enable it again.

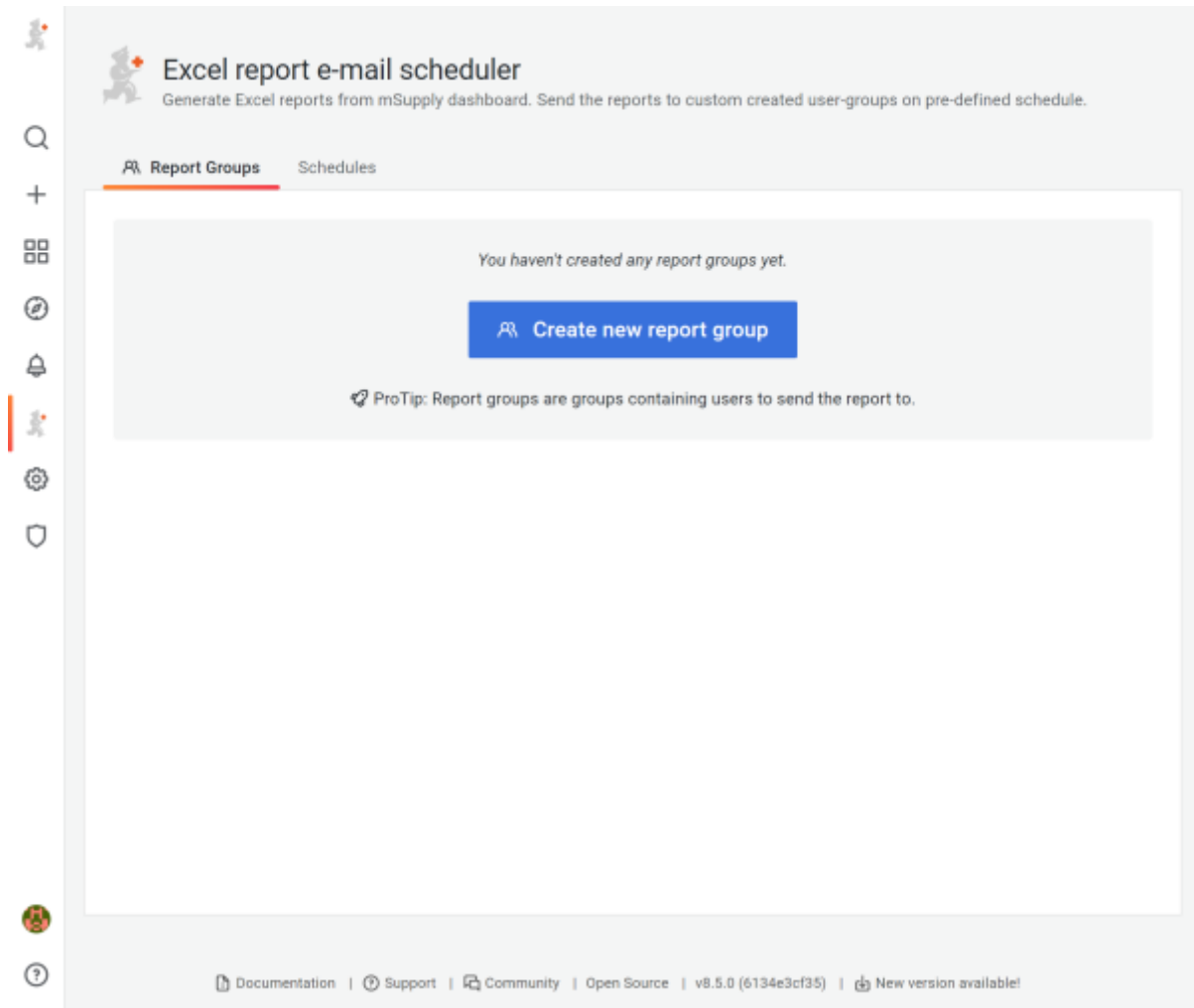
You are now ready to get started creating Reporting Groups!

Setting Up a Report Group

To access report groups, select the mSupply icon from the sidebar menu and select **Report Groups** from the drop-down menu.



In the following window select **Add report group**. This will create a **New report group** as seen below – click on this row to edit the report group details.



Edit report group details page:

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Generate Excel reports from mSupply dashboard. Send the reports to custom created user-groups on pre-defined schedule.

← Report Groups / New

Details

Name
Name of the report group

description
Description of the report group

Selected Users

You have not selected any member(s) yet

Select Group members

☐ Hide users without email ☒

Name	Email
<input type="checkbox"/> Star Clinic	mai@msupply.foundation
<input type="checkbox"/> demo-admin	admin@sussol.net
<input type="checkbox"/> HTY_A	m2@sussol.net
<input type="checkbox"/> demo	mai@sussol.net
<input type="checkbox"/> lly	sworup@sussol.net

[Create Report Group](#)

In the **Edit details** section there are free-text boxes for:

- Name
- Group description

Selected Users

- List of selected users shown here

Select the users that you want to be in your report group.

- A list is provided of all mSupply users
- You can show only mSupply users with an email address when **Hide users without email** toggle is on.

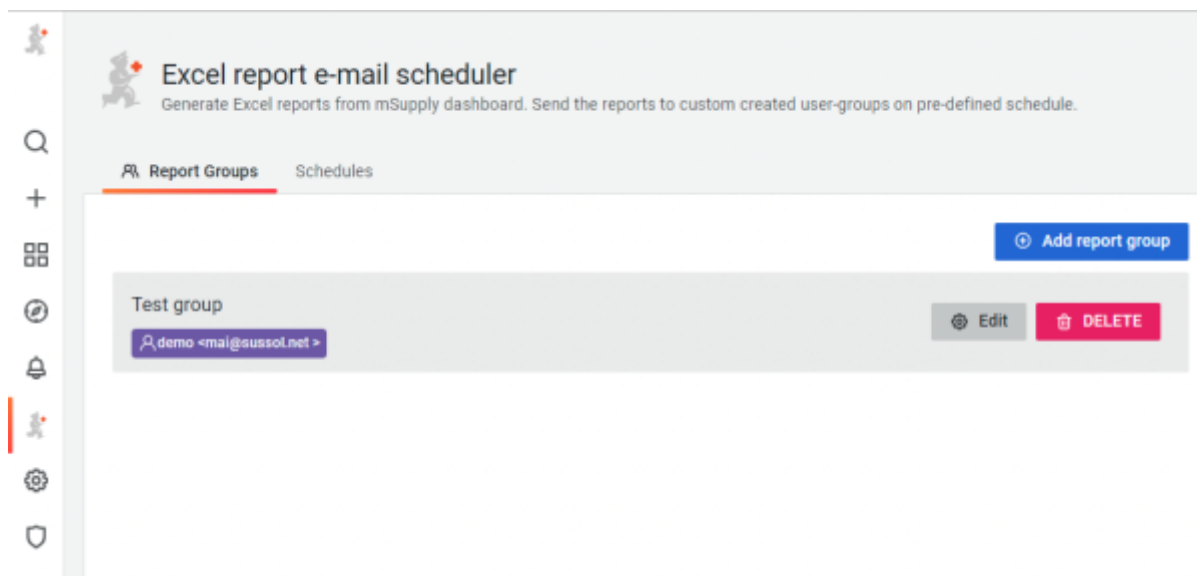


New users (or changes to a user's details) will not be updated from mSupply into the Dashboard immediately. It is depending on the timing of the dashboard export scheduler in mSupply. If you require an immediate update for Reports, please



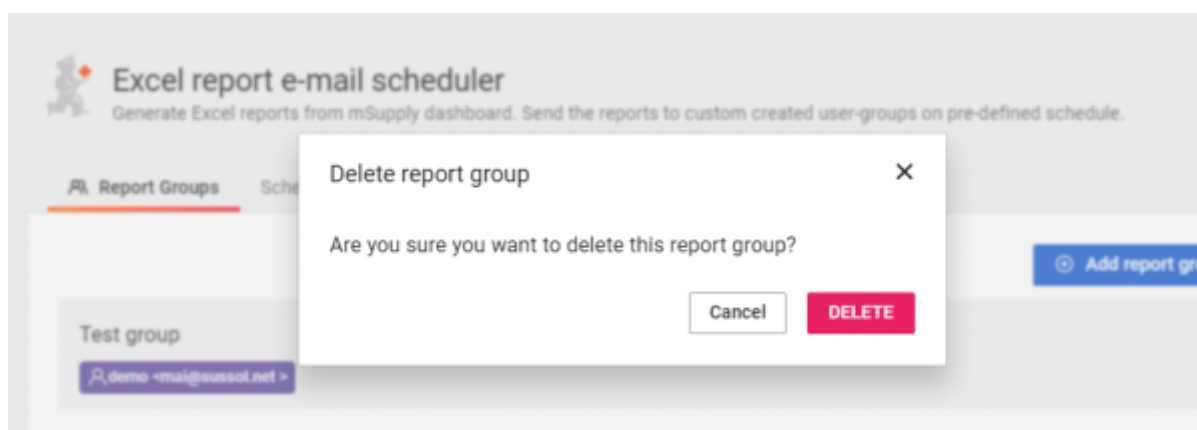
complete a manual export of **user** table from mSupply to the Dashboard.

Click on **Create Report Group** or **Update Report Group** (When you edit) to save.



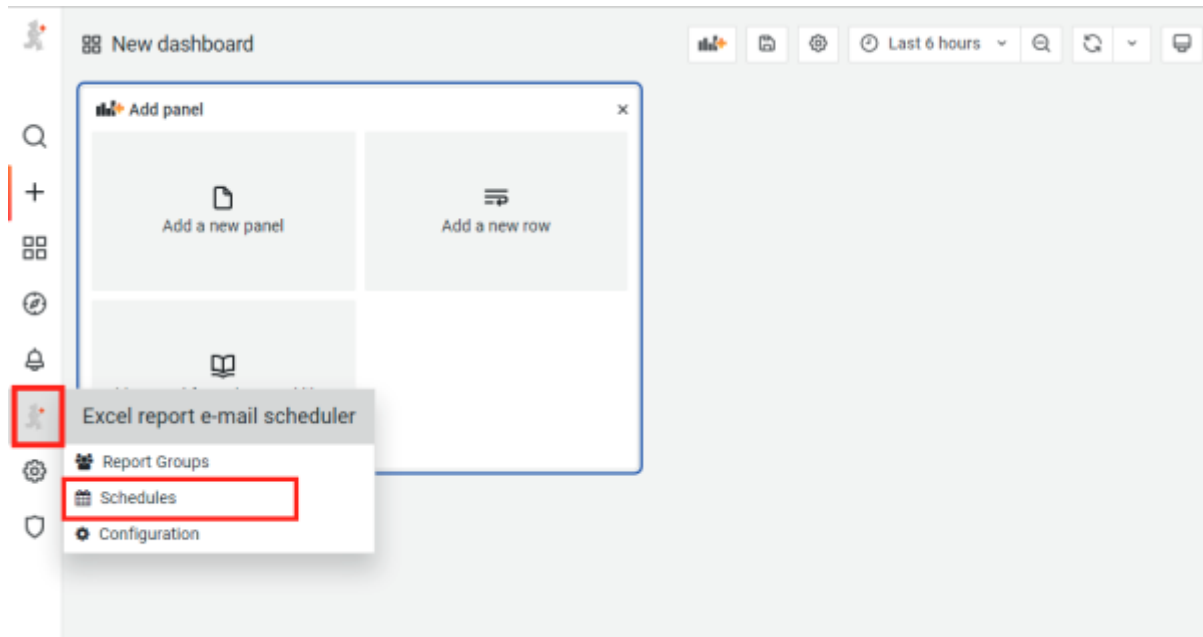
When you hover your mouse over the group, **Edit** and **DELETE** buttons appear.

Delete will remove the report group. You will receive a prompt to confirm deletion.

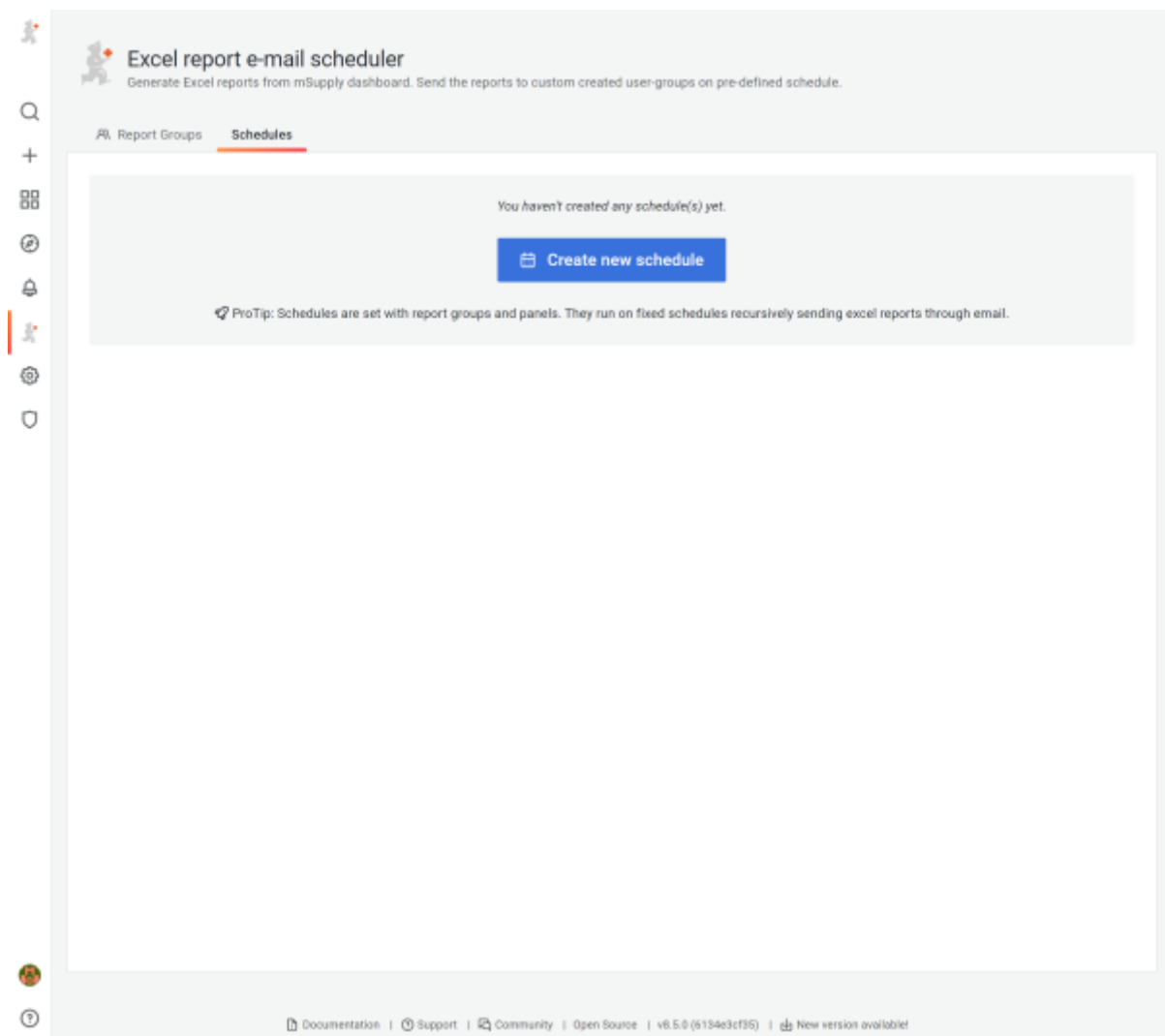


Setting Up a Report Schedule

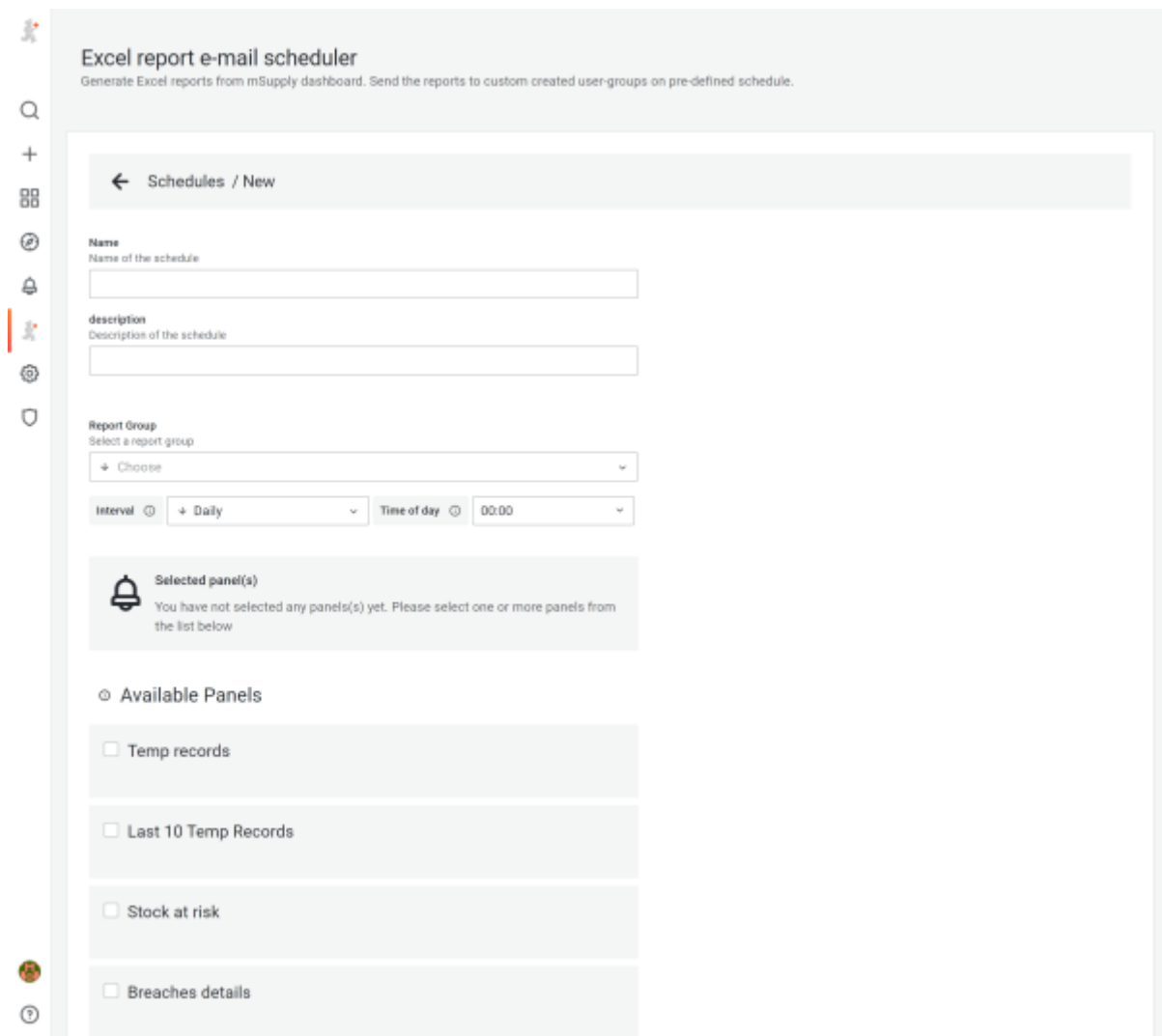
To access Report schedules, select the mSupply icon from the sidebar menu and select **Schedules** from the drop-down menu.



In the following window select **Create new schedule**. This will create a **New report schedule** as below – click on this row to edit the schedule details.



Edit report schedule details page:



The screenshot shows the 'Excel report e-mail scheduler' interface. At the top, it says 'Excel report e-mail scheduler' and 'Generate Excel reports from mSupply dashboard. Send the reports to custom created user-groups on pre-defined schedule.' Below this is a breadcrumb '← Schedules / New'. The form has several sections: 'Name' with a text box for 'Name of the schedule'; 'description' with a text box for 'Description of the schedule'; 'Report Group' with a dropdown menu for 'Select a report group' and a '+ Choose' button; 'Interval' with a dropdown menu set to 'Daily' and a 'Time of day' dropdown set to '00:00'; and 'Selected panel(s)' with a bell icon and a message: 'You have not selected any panels(s) yet. Please select one or more panels from the list below'. Below this is a section titled 'Available Panels' with four checkboxes: 'Temp records', 'Last 10 Temp Records', 'Stock at risk', and 'Breaches details'. A sidebar on the left contains various icons for navigation.

In the **Edit details** section:

- Name: free-text box that will also be the email subject.
- Description: free-text box
- Report group: select the name of the group that should receive the report
- Report interval: select the required reporting period from the drop-down box

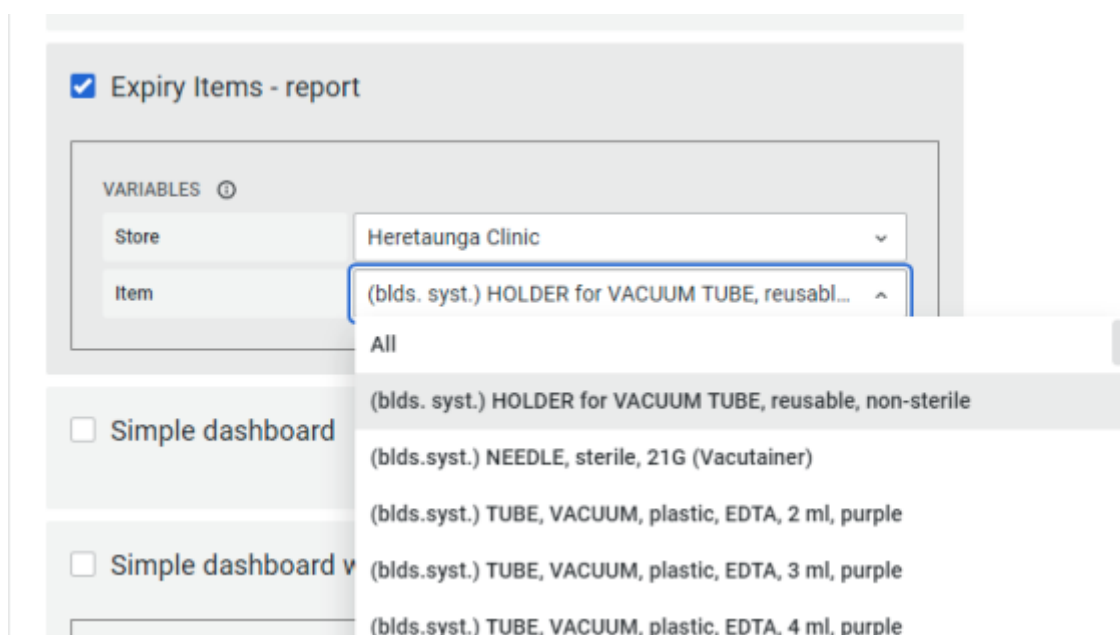


The emails will be sent according to the selected interval from the time the report schedule is created. For example, if a daily schedule is set up at 9am on 1 January 2021, the email will be sent every day at 9am from 2 January 2021.

Then select from the **Available Panels** to be displayed in the report:

- Any number of panels can be selected. Each panel will be on a separate worksheet in an attached Excel workbook - refer [Report template](#).
- Only “table” panels are supported.

For each panel selected, you will also need to specify the **Variables** to be displayed in the emailed report. This is done via the drop-down boxes that will be displayed once a panel is selected as shown in the below example for Expiry Items.



Using the drop-down boxes, you can choose the variables (in this case *Store* and *Item*) that you want displayed in the emailed report. Only the variables displayed within the Report Schedule screen are available for each panel.

The Grafana format of variables must be in the form: `${variable}` or `${variable:sqlstring}`. Other formats are not supported for dashboard reports. ¹⁾

Grafana macros are not supported with the following exception:

- The `$_timeFrom` and `$_timeTo` and `$_timeFilter` macros are supported using a Lookback variable. The `$_timeTo` date is set to date of report creation. The `$_timeFrom` will then be calculated as (`$_timeTo` - Lookback).
- For example, if you set a lookback period of 7 days and create a daily report starting on 1 January 2021. The first report's `$_timeFrom` will be 24 December 2020 and the `$_timeTo` will be 1 January 2021. The second report's `$_timeFrom` will be 25 December 2020 and the `$_timeTo` will be 2 January 2021. ²⁾

Press **Create schedule** button on the bottom of the page.

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← Schedules / Edit "Test" SEND TEST

Name
Name of the schedule
Test

description
Description of the schedule
test schedule

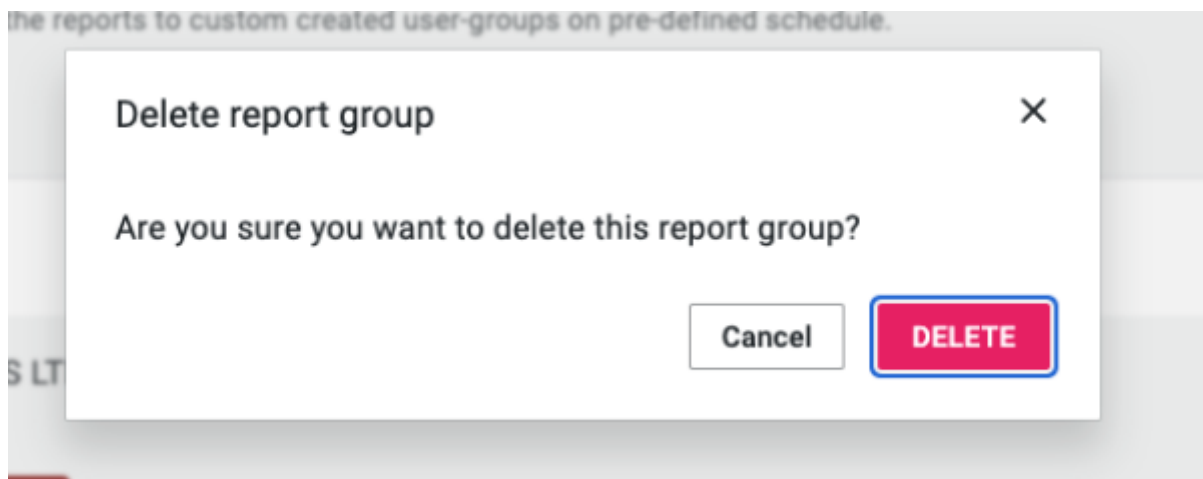
Report Group
Select a report group
+ New report group

Interval + Daily **Time of day** 00:05

Once you saved the scheduler, you can press **Send Test** button (top right corner) from the edit schedules. Please note:

- **Send Test** will not affect the timing of the schedule (the timing of the schedule is dependent on the time you save and close the report schedule)
- **Send Test** will send the email to all users in the report group!

DELETE will remove the report schedule. You will receive a prompt to confirm deletion.



Report Template

The panels selected in a report schedule will be sent via email in an Excel workbook:

- Each panel will be on a separate worksheet.
- Each worksheet will display in the title:

- Date of Creation
- Name of the Panel

1)

For more information on variables please refer to [Grafana variables](#)

2)

For more information on macros, please refer to [Grafana macros](#)

From:

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

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