Fondation Mérieux

Lab Book

LabBook 3.6

Automation configuration

V1

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Fondation **Mérieux**
Lutte contre les maladies infectieuses depuis 1967
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1. General overview

The Automation feature, introduced in LabBook version 3.6, lets you configure and schedule the automatic execution of key system tasks, such as data transfer and report generation. It helps to improve the consistency of operations, data reliability and operational efficiency of laboratories.

The functionality can be accessed via : **Integrations → Automation configuration**

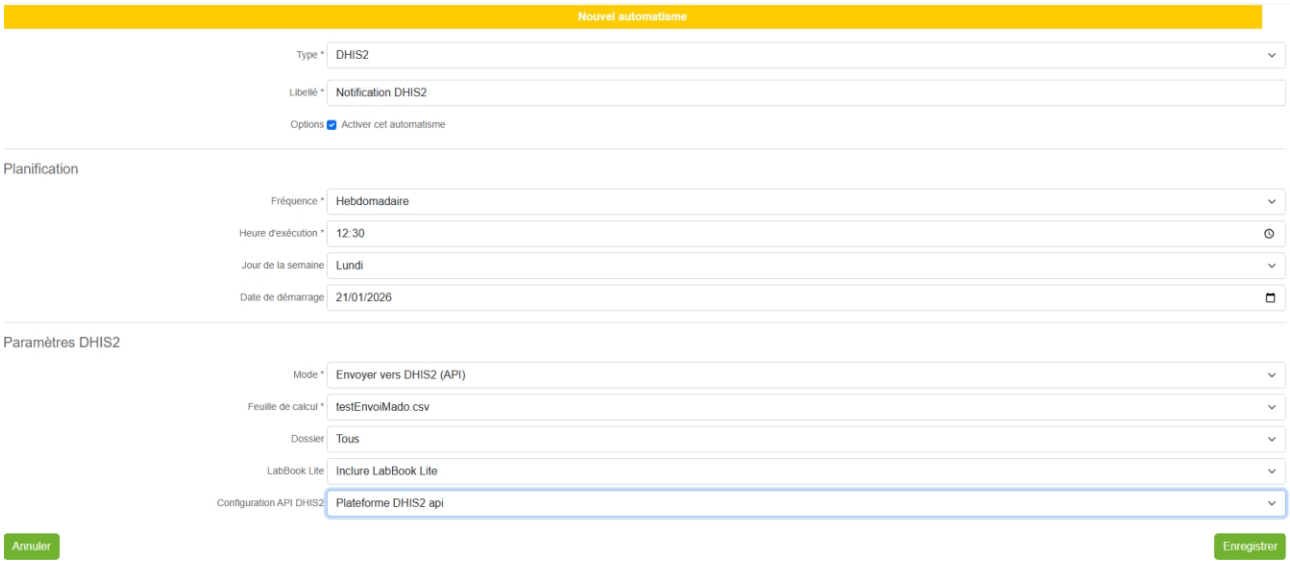
Access is restricted to users with appropriate rights, assigned by the administrator.

2. Automation configuration

The Automations configuration page displays all automated tasks in table form, with the name, type, frequency, next execution and status (Actif or Inactif). Actions are available for consulting, modifying or suspending automations, as well as accessing the execution history and creating new automations.

2.1. DHIS2 automatism

DHIS2 automations automatically transfer data from LabBook to the DHIS2 platform according to a defined schedule.



The user defines :

- general information (type, label, activation) ;
- schedule (frequency, day, time, start date);
- DHIS2 parameters (transfer mode, mapping file, data scope, API configuration).

Element	Description
Type	Selects the type of automation to be created. For data transfer to DHIS2, the DHIS2 type must be selected.
Label	Field used to define an explicit name for the automatism (e.g. DHIS2 notification, DHIS2 automatic send). This label makes it easier to identify the automatism in the list.
Options - Activate this automatism	This option activates the automatism immediately after it has been registered. If unchecked, the automatism is created but remains inactive until manually activated.
Frequency	Allows you to define the frequency of execution of the automatism (weekly, monthly, etc.).
Execution time	Time at which the automation will be triggered on the scheduled day.
Day of week	Field available when weekly frequency is selected. It is used to define the precise day of execution.
Start date	Date from which the automation becomes effective and starts running according to the defined schedule.
Mode	Defines the data transfer mode. Either via DHIS2 API or csv file creation and transmission.

Spreadsheet	Selects the file used for data mapping between LabBook and DHIS2.
Folder	Allows you to define the scope of files taken into account during transfer (all files or outpatient or inpatient files).
LabBook Lite	Option to include or exclude data from LabBook Lite in the transfer.
DHIS2 API configuration	Selects the DHIS2 platform connection configuration (URL, authentication, technical parameters), previously defined in the system.

Configuration example

Context: automate weekly data transfer to DHIS2.

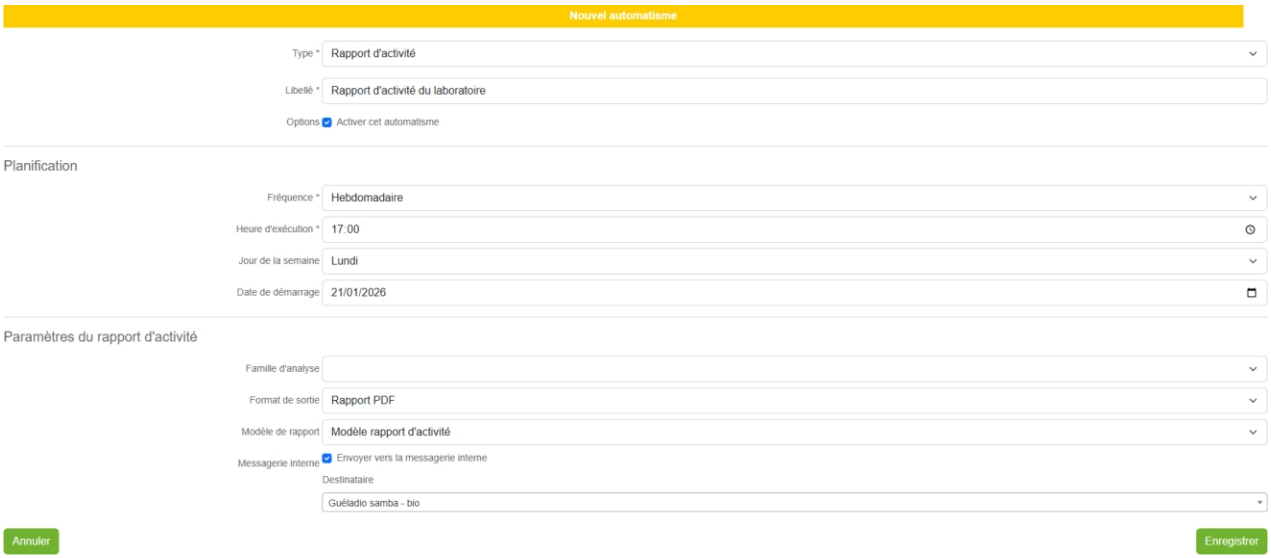
- Type: DHIS2
- Label: DHIS2 notification
- Frequency: Weekly (Monday)
- Execution time: 12:30
- Start date: 21/01/2026
- Mode: Send to DHIS2 (API)
- Spreadsheet: testEnvoiMado.csv
- Folder: All
- LabBook Lite: Include
- DHIS2 API configuration: DHIS2 API platform

Expected results

For each scheduled execution, data is automatically transmitted to DHIS2 and the result of the operation can be consulted in the automation history.

2.2. Activity report automatism

The creation of an Activity Report automatism enables the automatic generation and distribution of laboratory activity reports according to a defined schedule.



Element	Description
Type	Allows you to select the type of automation. For automatic generation of the activity report, the Activity Report type must be selected.
Label	Field used to define an explicit name for the automatism (e.g.*Rapport d'activité du laboratoire*), making it easier to identify in the list of automations.
Options - Activate this automatism	Allows you to activate the automatism immediately after it has been saved. If this option is unchecked, the automatism is created but remains inactive until manually activated.
Frequency	Allows you to define the periodicity of report generation (daily, weekly, etc.).
Run time	Time at which the activity report will be automatically generated.
Day of week	Field available when weekly frequency is selected. It is used to define the exact day of execution.
Start date	Date from which the automation becomes effective and starts running according to the defined schedule.
Analysis family	Allows you to restrict the report to one or more analysis families, according to the needs of the laboratory. If this field is left blank, all analyses can be included.
Output format	Defines the format of the generated report (e.g. *Rapport PDF*).
Report template	Selects the template used to generate the activity report. The activity report template is based on the "Activity Report" template, previously configured in menu *Configuration des modèles*

	de document. This template determines the structure, layout and information displayed in the report.
Internal messaging	When this option is activated, the generated report is automatically sent via LabBook's internal messaging system.
Recipient	Select the user(s) to receive the generated activity report.

Configuration example

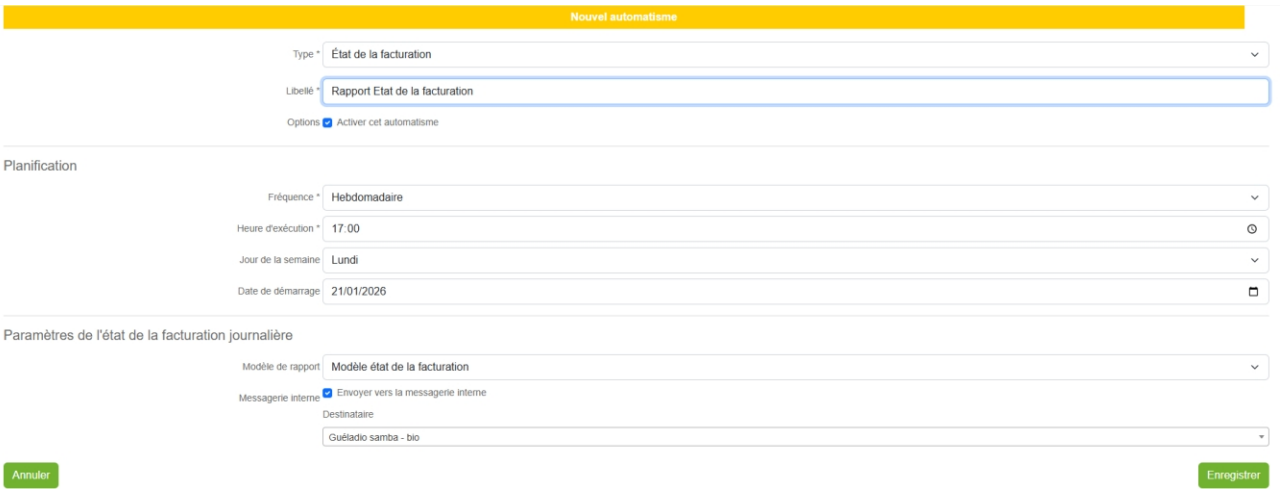
- Type: Activity report
- Label : Laboratory activity report
- Status: Active
- Frequency: Weekly
- Day of execution : Monday
- Run time : 17:00
- Start date : 21/01/2026
- Analysis family : All
- Output format: PDF report
- Report template : Activity report template
- Internal messaging: Enabled
- Recipient : Guéladio samba - bio

Expected output

Every Monday at 5:00 p.m., LabBook automatically generates the activity report in PDF format and sends it via internal messaging to the selected recipient.

2.3. Billing status automatism

Create a Billing Status automatism to automatically generate and distribute the laboratory's billing status report according to a defined schedule.



Item	Description
Type	Selects the type of automation. For financial report generation, the Billing status type must be selected.
Wording	Field used to define an explicit name for the automatism (e.g.*Rapport État de la facturation*), making it easier to identify in the list of automations.
Options - Activate this automatism	Allows you to activate the automatism immediately after it has been saved. If this option is unchecked, the automatism is created but remains inactive until manually activated.
Introduction	The Scheduling section lets you define the time parameters for running the automatism.
Frequency	Allows you to define the periodicity of report generation (daily, weekly, etc.).
Execution time	Time at which the billing status report will be automatically generated.
Day of week	Field available when weekly frequency is selected. It is used to define the precise day of execution.
Start date	Date from which the automation becomes effective and starts running according to the defined schedule.
Introduction	This section is used to define report content and distribution mode.
Report template	Select the template used to generate the billing status report. This template is based on the "Billing status" template, previously configured in menu *Configuration des modèles de document*. It determines the structure, layout and financial information presented in the report.

Internal messaging	When this option is activated, the generated report is automatically sent via LabBook's internal messaging system.
Recipient	Select the user(s) to receive the generated report.

Configuration example

- Type: Billing status
- Label: Billing status report
- Status: Active
- Frequency: Weekly
- Run day: Monday
- Run time : 17:00
- Start date : 21/01/2026
- Report template: Billing status template
- Internal messaging: Enabled
- Recipient : Guéladio samba - bio

Expected result

At each scheduled run, LabBook automatically generates the billing status report and sends it via internal messaging to the appropriate recipient.

3. Automation run history

The Automation Execution History page enables you to view all executions performed by automations configured in LabBook. It is an essential tool for monitoring, controlling and diagnosing the correct operation of automated tasks.

This page is accessed from the Automation Configuration page, by clicking on the History button.

The page displays a table listing each automation run, with associated information.

Reading and interpreting results

Each line of the table corresponds to a scheduled execution. By analyzing the history, you can check that automated processes are running at the scheduled dates and times; confirm that reports have been generated and sent correctly; quickly identify failed executions (status *Erreur*); diagnose problems linked to configuration, connectivity or parameters used.

When an automated system generates a file (activity report or billing status), the download icon enables direct retrieval of the document produced.

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