

Chapter 25

Reports

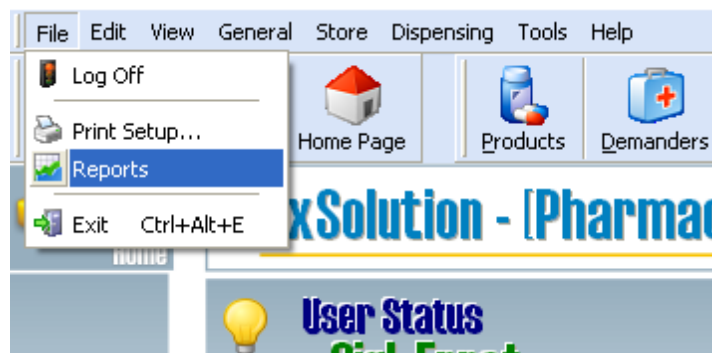
This chapter—

- Familiarizes the user with how to—
 - Generate a report
 - Apply parameters to a report
 - Import and export a report template

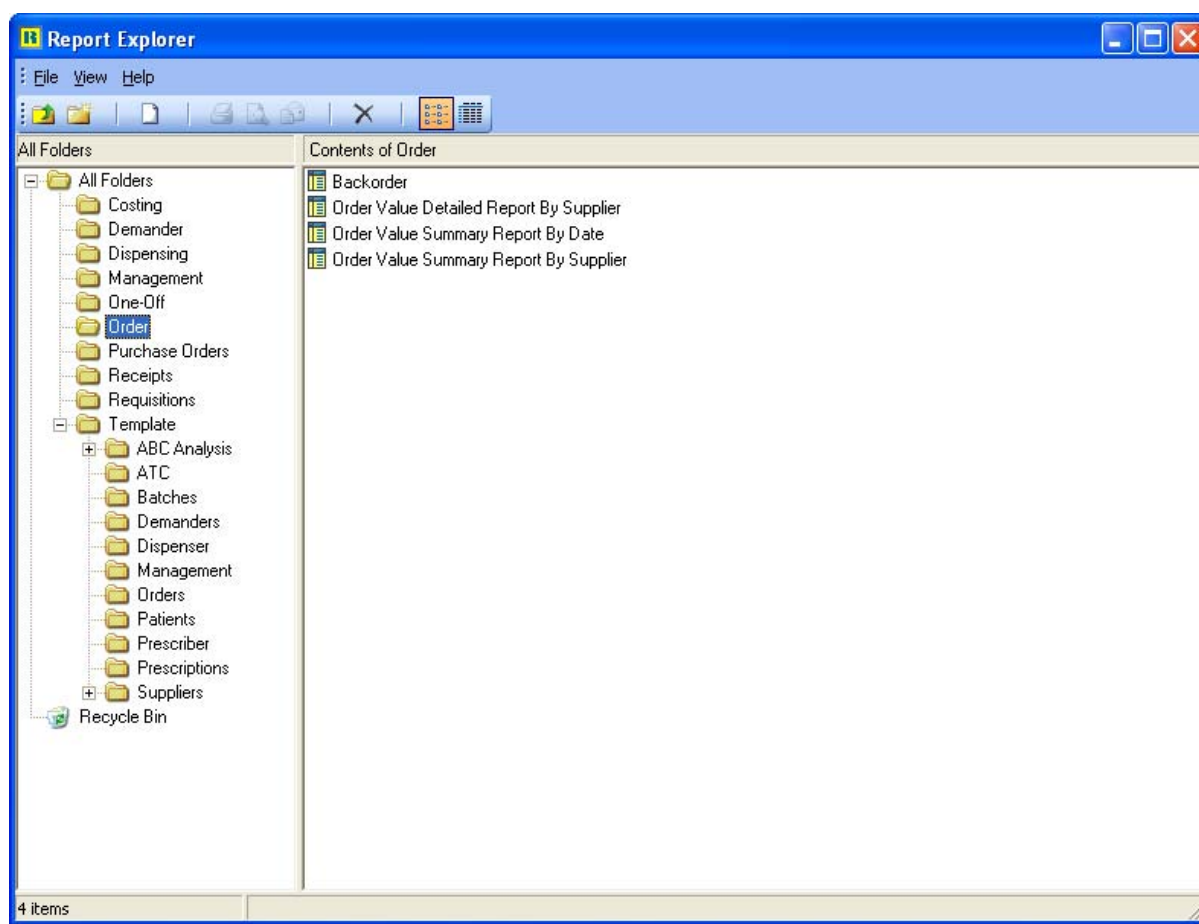
Using RxSolution to Generate Reports

How Do I Get to the Reports Screen?

On the main RxSolution menu, click on **File** and then **Reports**.



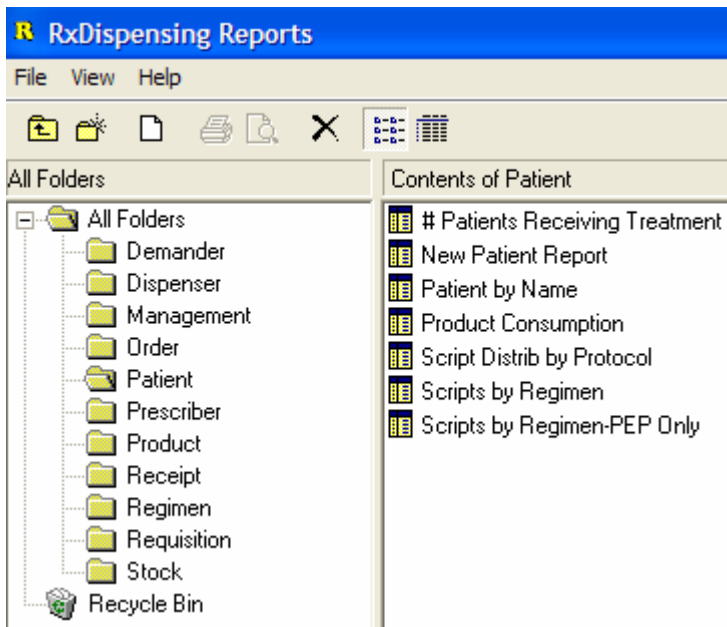
The screen below will appear.




What Type of Reports Can RxSolution Generate?


Reports maintained and created for Province/Country requirements. There many standard reports which are available from our office as a reports catalogue on request. New and changed reports are loaded by the RxSolution consultants.

To open a folder to view the list of reports in it, click the folder icon to the left of the name of the folder. A list of the reports in that folder will be displayed in the right side of the screen.




How Do I Run a Report with Default Settings and No User-Required Filters?

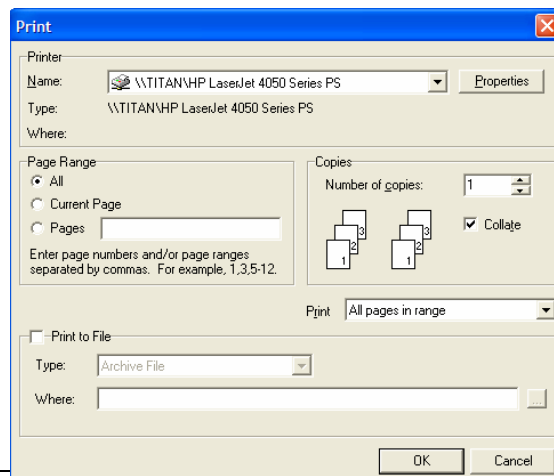
To run a report with the default settings, simply click on the name of the report and then click on the print preview button .

To print a hard copy of the report, click on the printer icon  in the top left-hand corner of the screen.

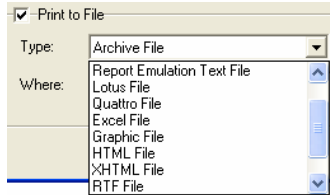
The following screen appears—


At this stage, you have two options—

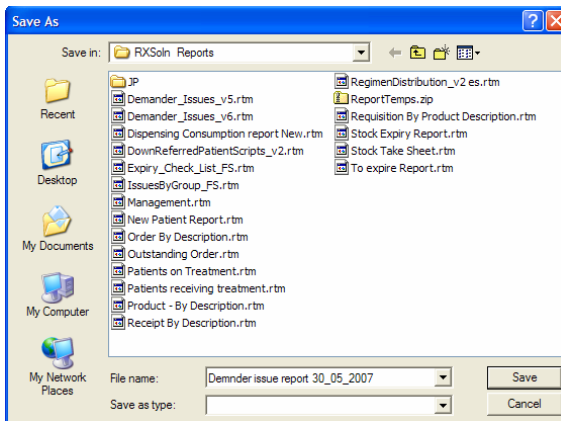
- To print a hard copy to paper, click on , or
- To print to a file, place a check mark in the **Print to File** box, and




select which file type you would like to print to.

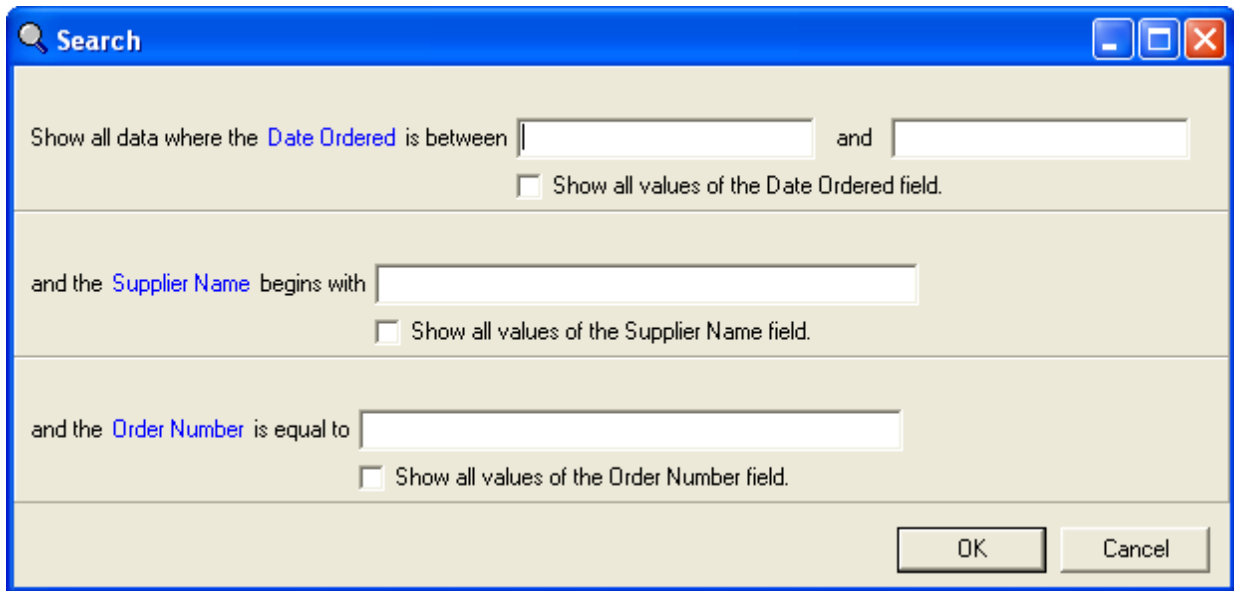


Click on the **Where:** browse button  to select the destination of the file. Select the required folder and type in the proposed file name, and click on **Save**.



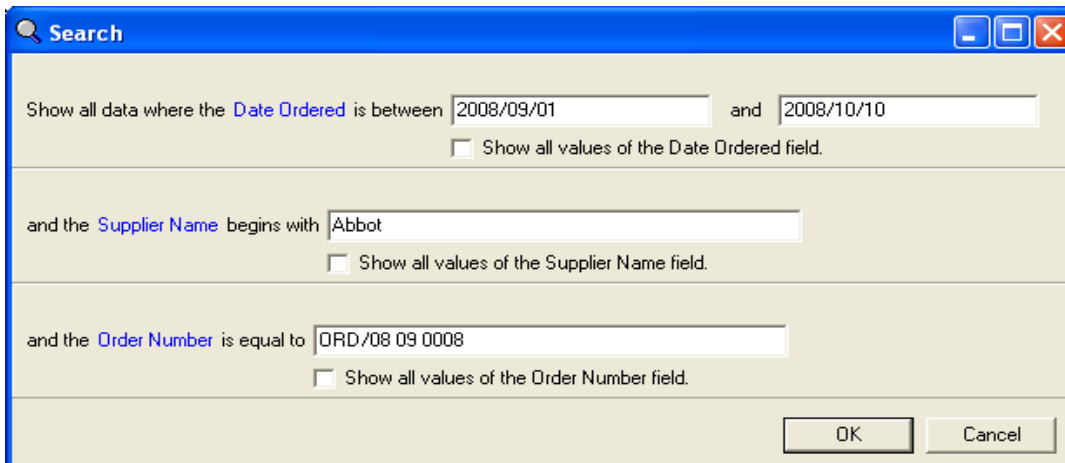
How Do I Run a Report with the Data Filtered?

1. To specify parameters to restrict the range of information displayed in the report, click the name of the report, then click the print preview button .
2. For some reports, a screen will appear in which the user can enter values to narrow the information requested in the report. An example is shown below—



A screenshot of a Windows-style dialog box titled "Search". The dialog has a blue title bar with standard minimize, maximize, and close buttons. The main area is light beige and contains three filter sections. Each section has a label, a text input field, and a checkbox. The first section is for "Date Ordered" with a range between two empty fields and a checkbox labeled "Show all values of the Date Ordered field.". The second section is for "Supplier Name" with a "begins with" label and an empty field, with a checkbox labeled "Show all values of the Supplier Name field.". The third section is for "Order Number" with an "is equal to" label and an empty field, with a checkbox labeled "Show all values of the Order Number field.". At the bottom right are "OK" and "Cancel" buttons.

3. In this case, the user can state that he or she wants the report to print the ordered date to be between two dates, the supplier's name to start with a certain parameter, and/or the order number to be a certain value, as shown below.



A screenshot of the same "Search" dialog box, but with example values entered. The "Date Ordered" section shows the range "2008/09/01" and "2008/10/10". The "Supplier Name" section shows "begins with" and the value "Abbot". The "Order Number" section shows "is equal to" and the value "ORD/08 09 0008". All three checkboxes are unchecked. The "OK" and "Cancel" buttons are at the bottom right.

Detailed Orders Report

Show all data where the Date Ordered is between
2008/09/01,2008/10/10

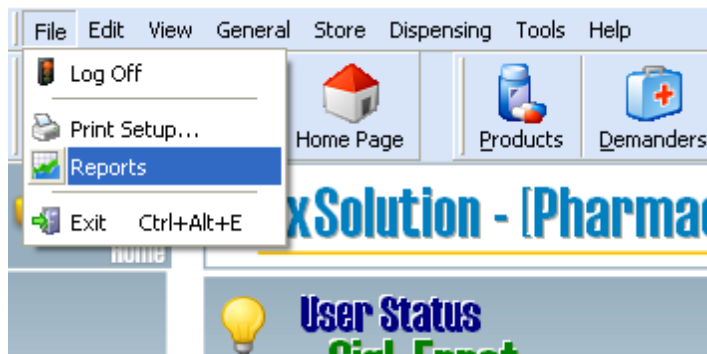
By Supplier


ABBOT LABORATORIES [001ABB]							
ORD/08 09 0008		pos443	Ordered = 2008/09/26		Expected =		
ICN	ECN	Description			Qty Ord.	Price	Item Total Value
1102600	85006	AxSYM HCV Version 3.0 Cotrol 2*4.0mL			2	233.63	467.26
1102500	85003	AxSYM HBsAg V2.0 Reagent 100			5	2,294.86	11,474.30
1102750	85001	AxSYM HIV Ag/Ab Combo Reagent 100			5	1,655.37	8,276.85
1102550	85004	AxSYM HBsAg V2.0 Control 2*4.0 mL			2	288.66	577.32
1102650	85005	AxSYM HCV Version 3.0 Reagent 100			10	4,690.40	46,904.00
					Total For Order		338,498.65
					Total For Supplier		338,498.65

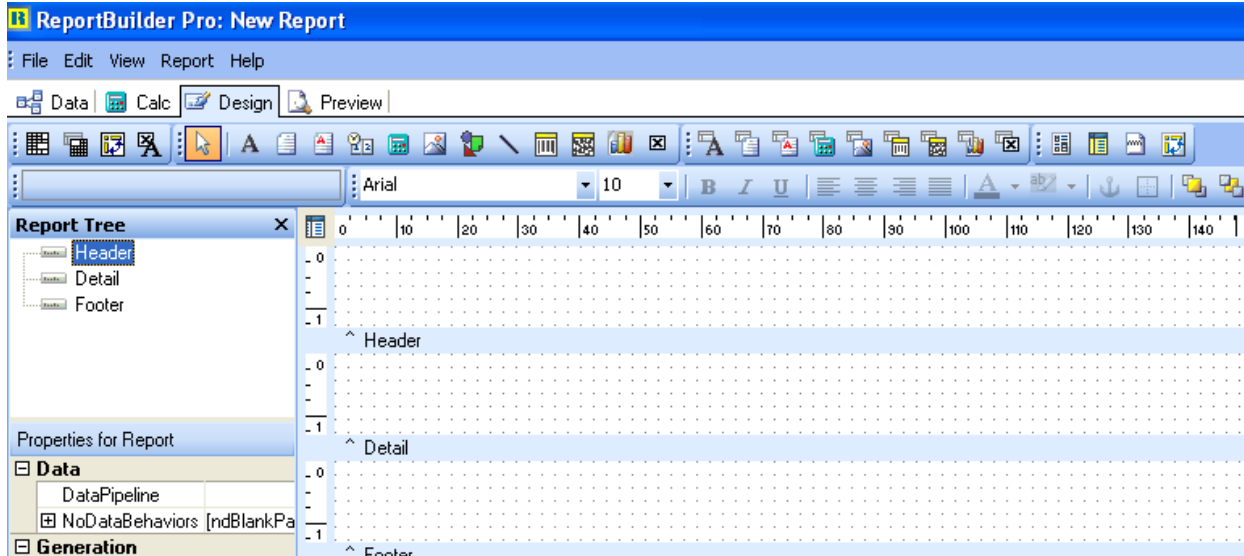
How Do I Import and Export Report Templates?

Adding new reports to your installation of RxSolution is easy and may be necessary if, for example, you request your support team to create a new report for you. They write it at one location, then e-mail it to you to add to your copy of the program. Follow the steps below to import a report template.

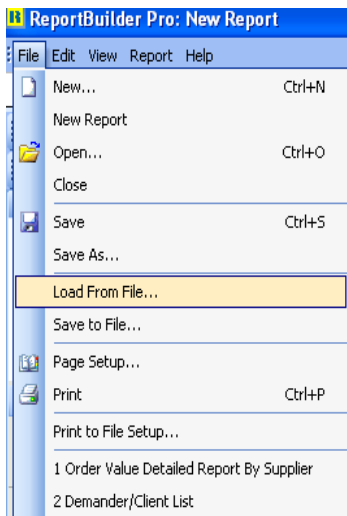
Importing a Report Template



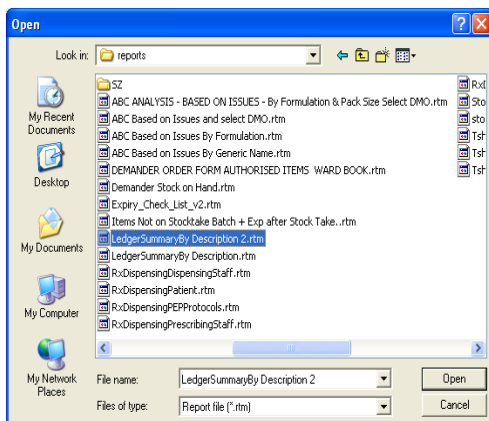
1. On the main RxSolution menu, click on **File** and then **Reports**.
2. In the **Report Explorer** software menu that opens, click on the new report icon .
3. The **ReportBuilder Pro: New Report** screen opens.



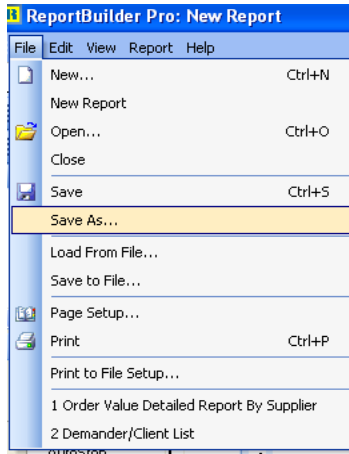
4. Click on **File**, and then **Load from File**.



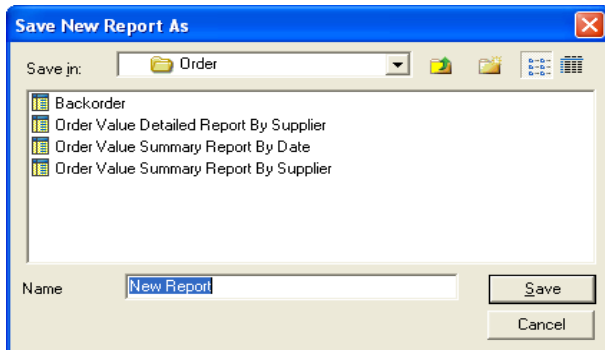
5. The **Open** window will appear, as follows.



6. Use the window interface to locate the report template file that you want, click on it, and then click the **Open** button.
7. After the report template opens, click **File**, and then **Save As** to save the report on your computer.



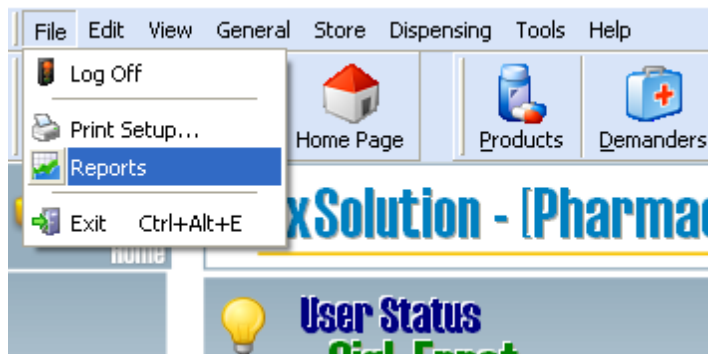
8. Select the folder where you want to save the file, then give the report file a name and click on **Save**.



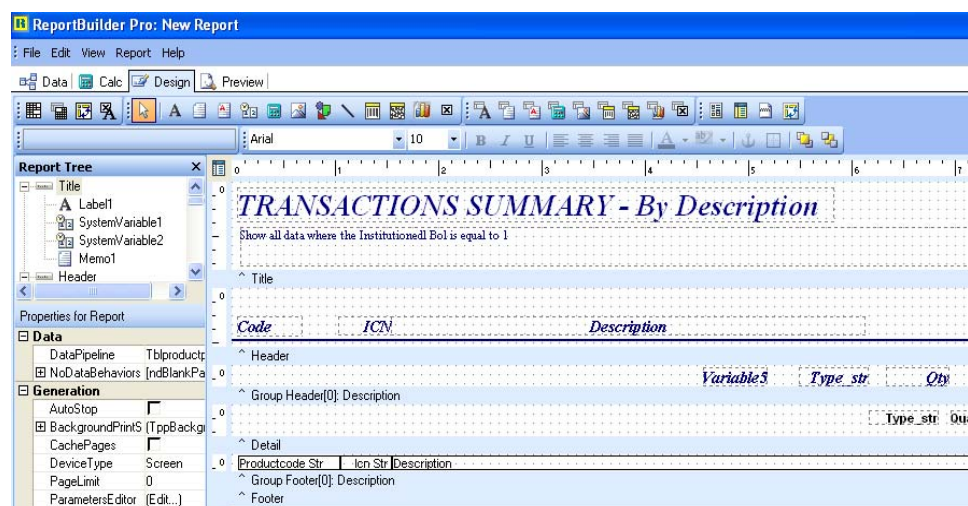
9. Close the screen.
10. The new report should appear in the location where you saved it in the list of reports and can be run through the normal process.

Exporting a Report Template

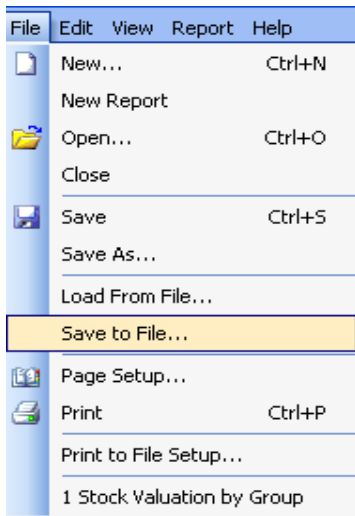
If you create a report that you want to share with someone else, you will need to export the report template. Follow the steps below to create a file to send to someone else.



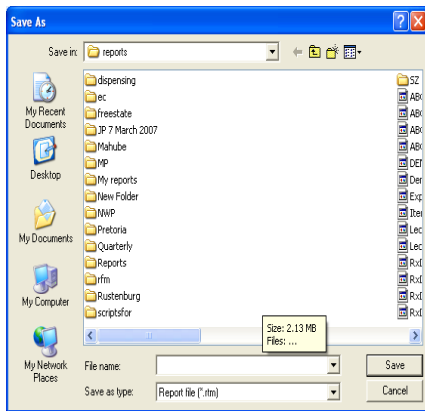
1. On the main RxSolution menu, click on **File** and then **Reports**.
2. In the **ReportBuilder** software menu that opens, double click on the report file name that you want to export.
3. The report will open in **Design** mode, as shown below. Be careful not to change anything on this screen.



4. Click on **File** in this screen's menu, and then **Save to File**.



5. The **Save As** screen will open, as follows—



6. Using the **Save As** window, choose a location and name for the report file, then click the **Save** button.
7. The file is now available where you have saved it to send by e-mail, move it to a disk, or execute any other normal file operation.