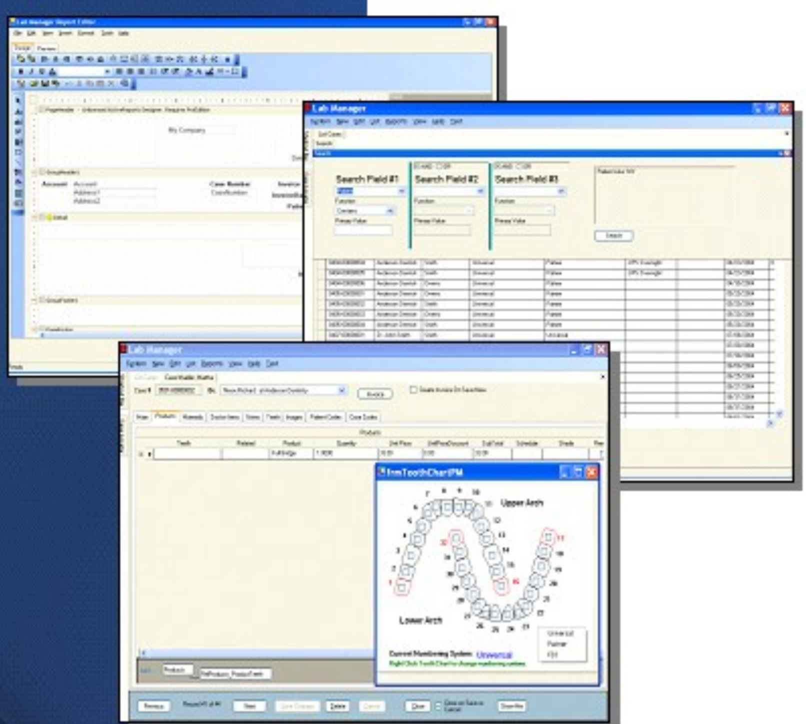
Premium LabManager™

Custom Report Generator Manual



Published by
LSG Publishing

2733 N Power Rd. #102 PMB 488, Mesa, AZ 85215

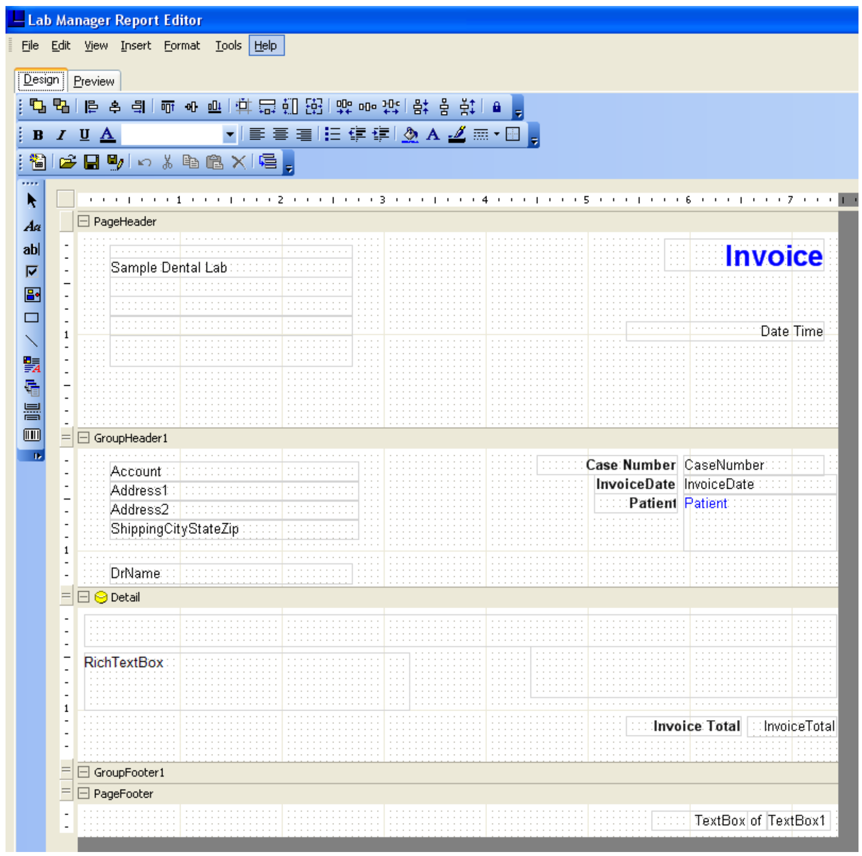
LABORATORY SYSTEMS GROUP, INC.

2733 N Power Rd. #102 PMB 488, Mesa, AZ 85215

Support: (602) 264-5913
Sales: (800) 677-1120
FAX: (602) 279-3633
sales@labsysgrp.com
www.labsysgrp.com

Customizing Reports in Version 6

Overview:



Customizing reports and forms like invoices and statements using Lab Manager Version 6 is easy once you have mastered a few simple concepts.

This document demonstrates these concepts by showing you how to modify the LSR invoice form, however, these same concepts apply to all reports and forms.

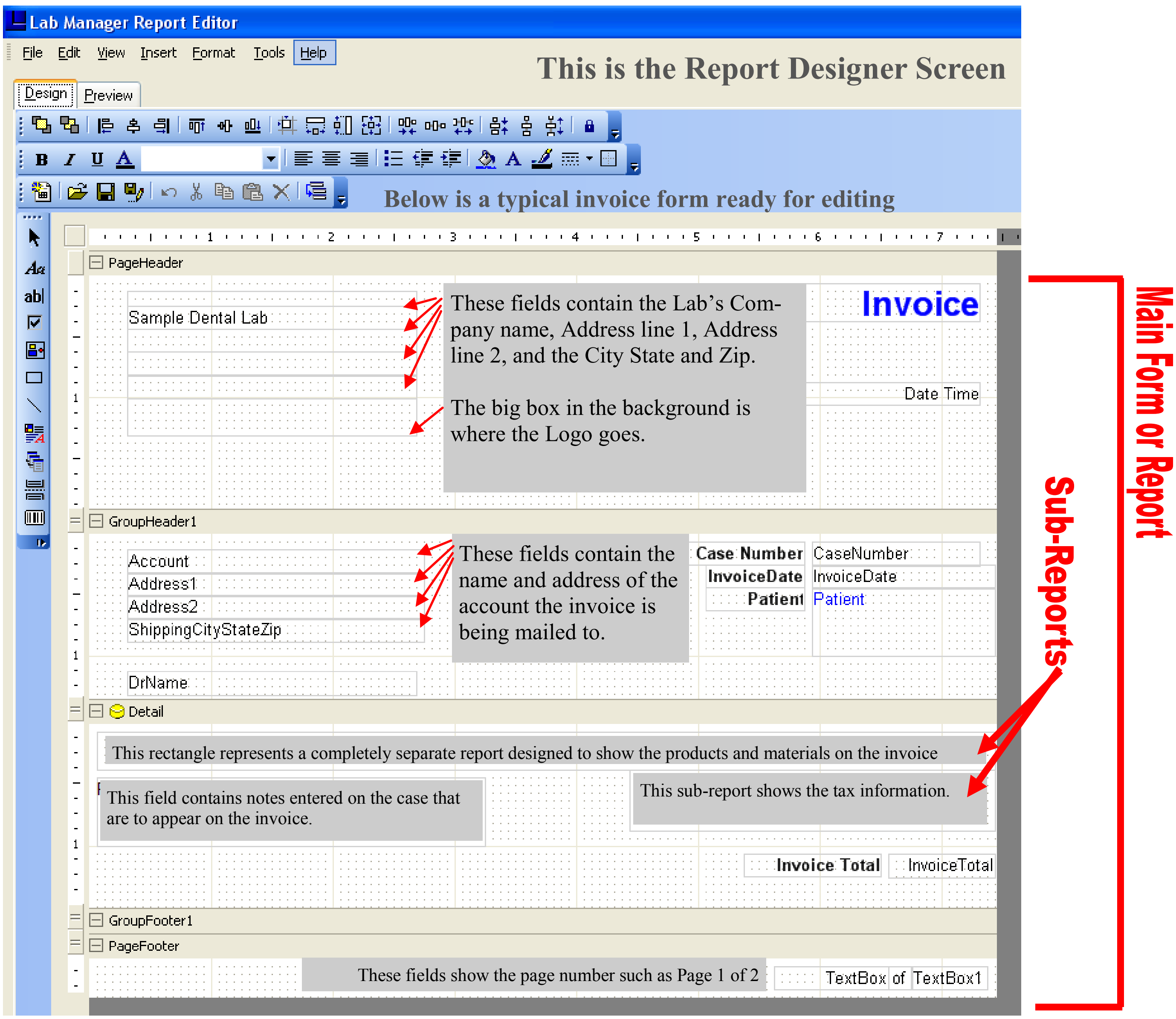
Typical steps to modify a report or form;

1. Find the report using the menu at the top of the screen. For example, to modify the invoice, go to **Reports>Billing>Invoices**.
2. Click on the Design button.
3. Customize the form.
4. Use the "Save As" option (**File>Save As**) at the top of the screen to save the report in the Custom Reports folder.
5. Add the new custom report to Lab Manager's list of custom reports.
6. Substitute your new custom report for the existing report.

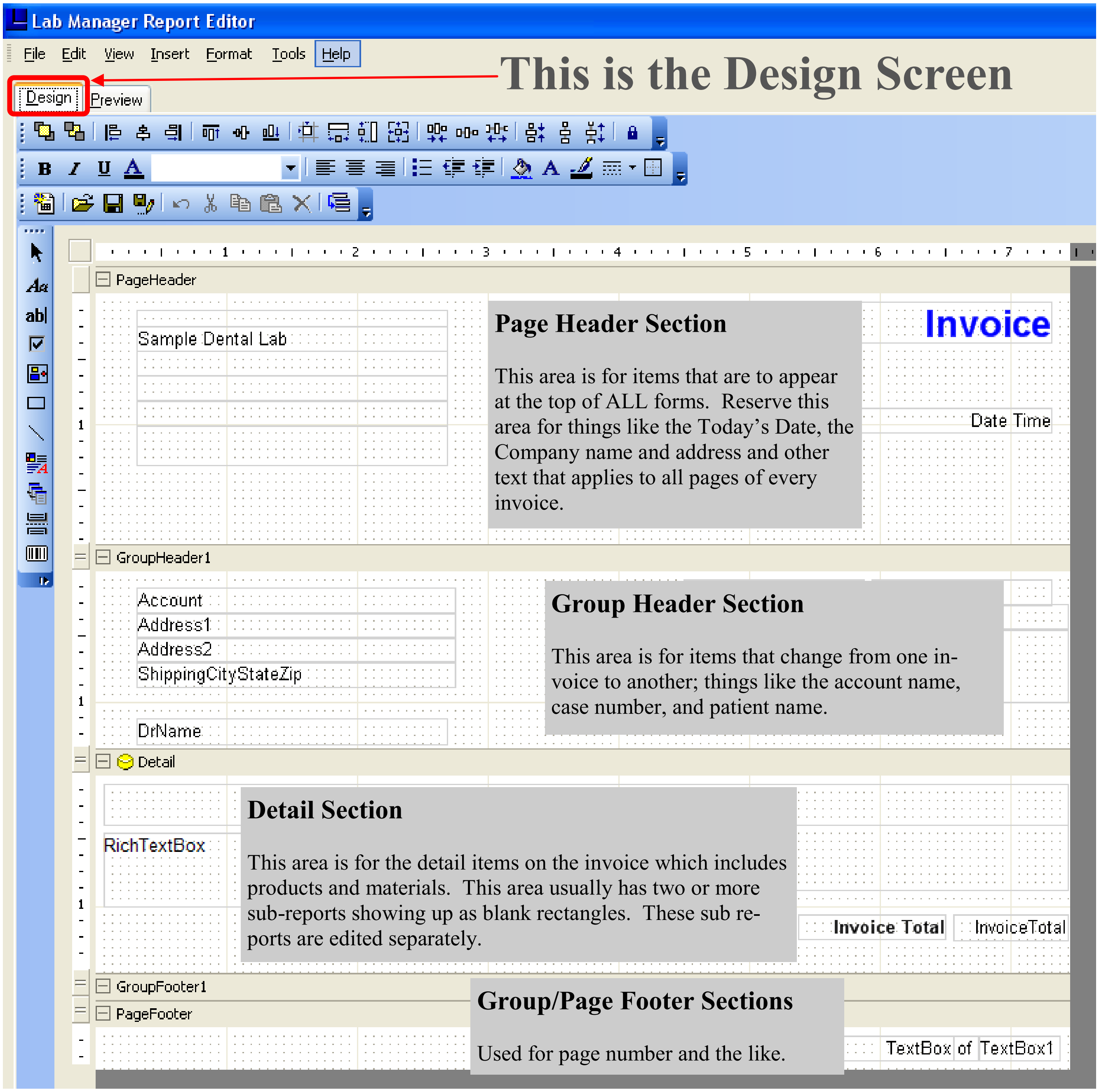
From now on, Lab Manager will use your new custom report instead of the pre-defined one.

The following pages will describe the above steps in much more detail.

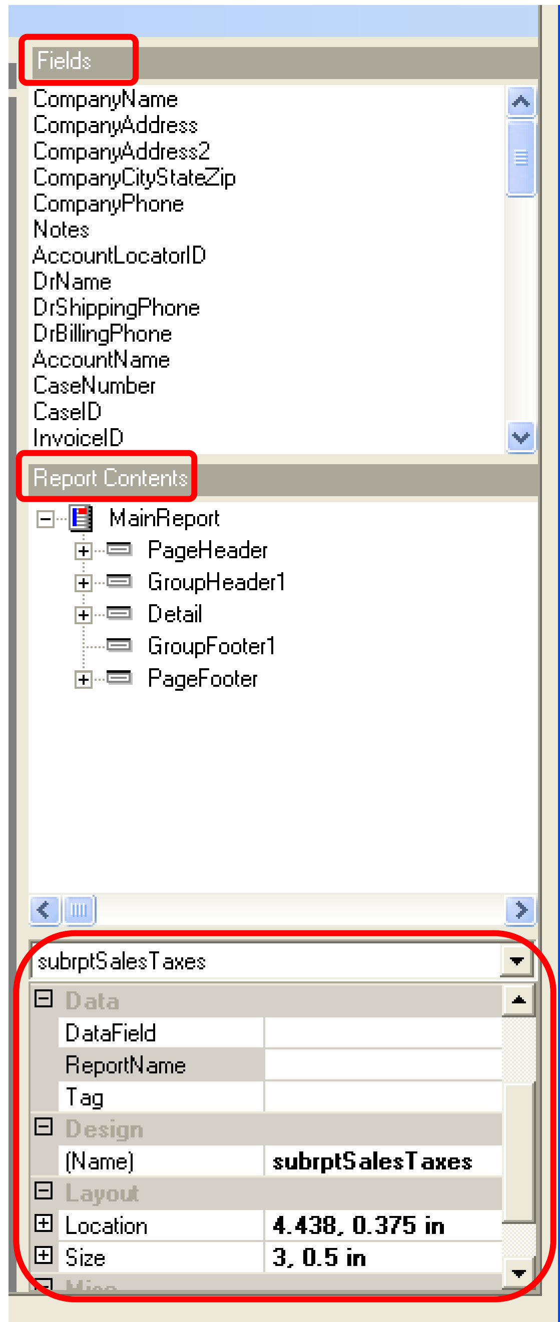
The Parts of a Report



The Parts of a Report



The Parts of Report Designer



Fields:

This area shows a list of the fields that are available to be placed onto the Page and Group Headers and the Page and Group Footers. *To add a field to one of the sub-reports in the detail area, you must edit that sub-report separately as a unique report (See page 11).*

If a you want to add a field to the report that is not here, simply submit that request to LSG for consideration. If we agree, then the programming department will add the field to the list of fields.

Report Contents:

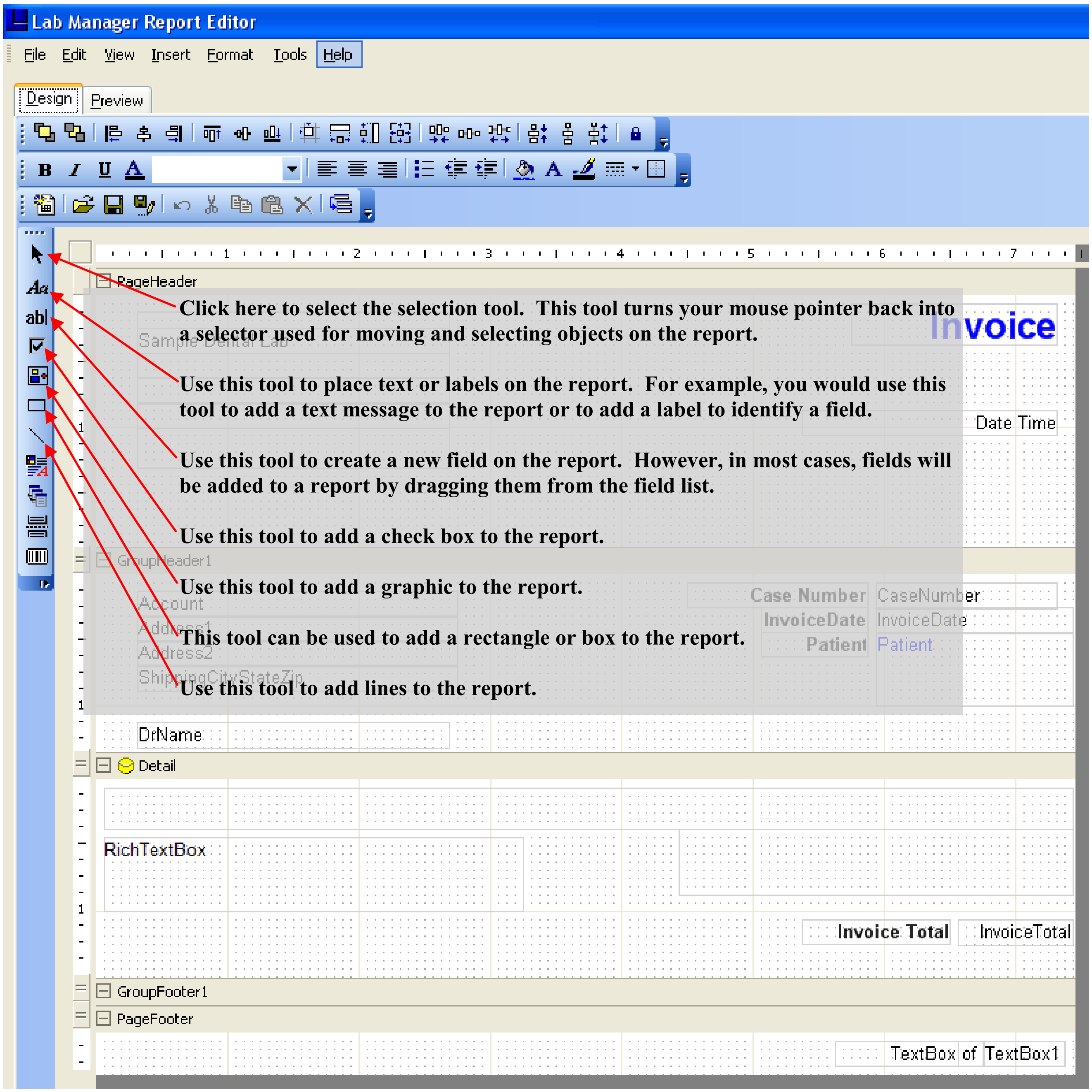
This area provides an easy way to select one of the report sections. For example, to edit the Detail area, you can either click on the word “Detail” to the left or click somewhere inside the detail area on the report itself.

Properties:

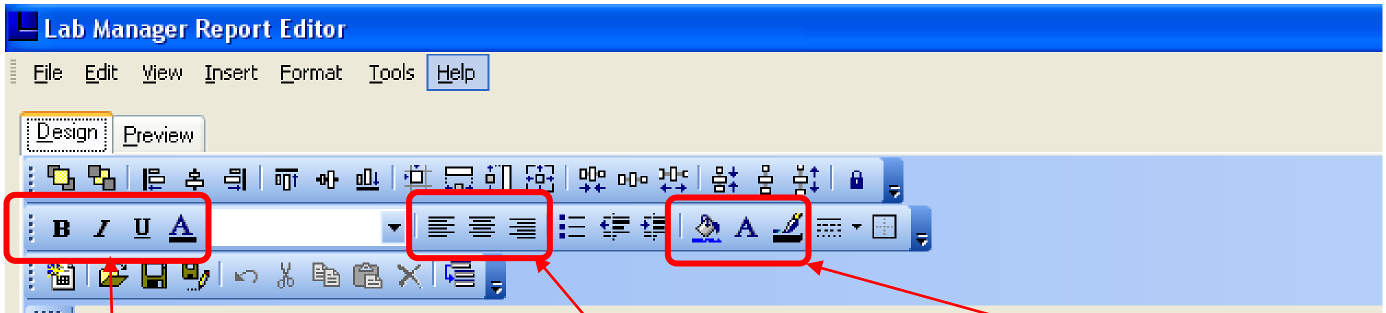
This area shows the many properties related to the selected field, report section, or sub-report. In the example to the left, it shows that we have selected the sub-report for Sales Taxes.

Properties that can be modified here include fonts, colors, graphics, word wrap, visible or not, growth properties and more. *Many times it is better to mark an item as Not Visible instead of deleting it.*

The Parts of Report Designer



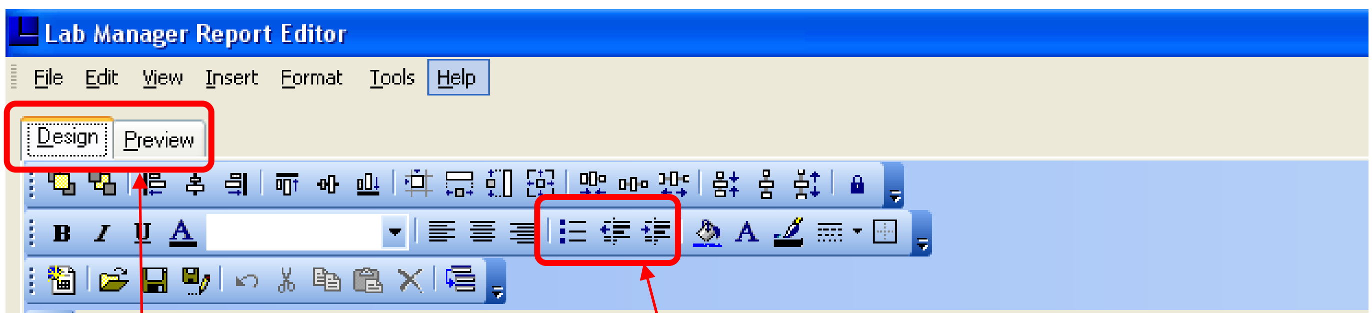
The Parts of Report Designer



Use these tools to change the selected text to **Bold**, *Italic*, Underlined and to change the font color.

Use these tools to left align, center or right align selected text.

Use these tools to change the background color, text color, and line color.



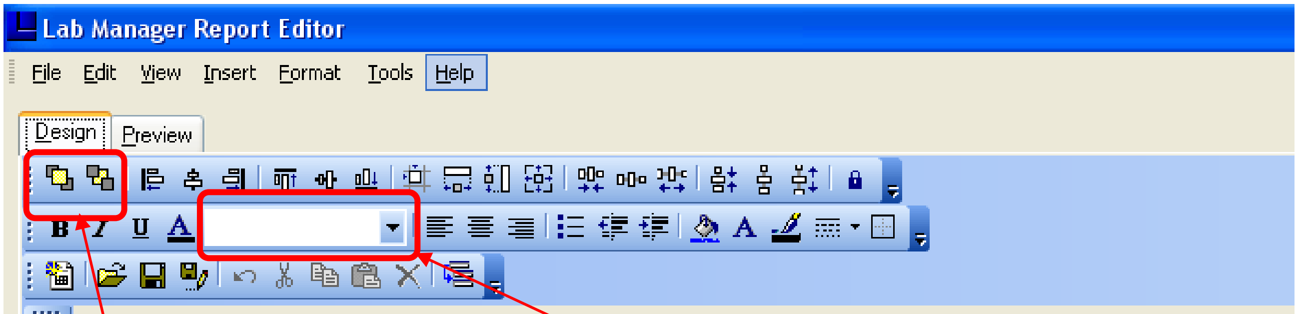
Use these tabs to jump back and forth between modifying the report and viewing the results of the modifications.

Use these tools to create bulleted lists of text. For example;

- Item number 1
- Item number 2
- Item number 3

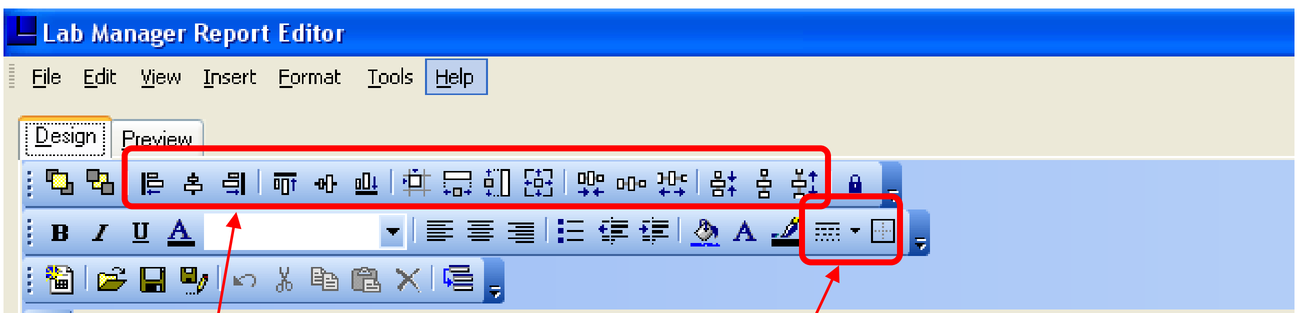
Use this menu item to save your changes and to print a sample of the report. Also located under File, is an item called Report Properties which is used to change margins and other page related properties.

The Parts of Report Designer



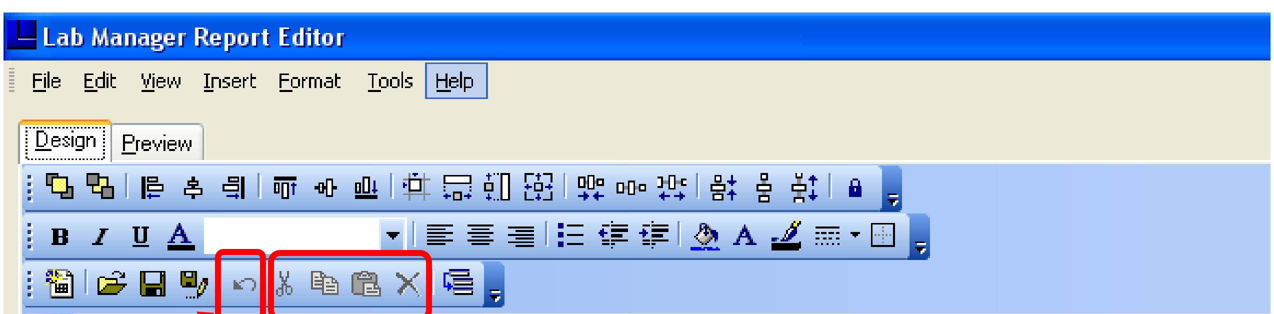
Use these tools to move an item behind or in front of another object.

Use this tools to change the font of the selected text.



Use these tools to align objects left, right, top, bottom, and to change spacing be-tween objects.

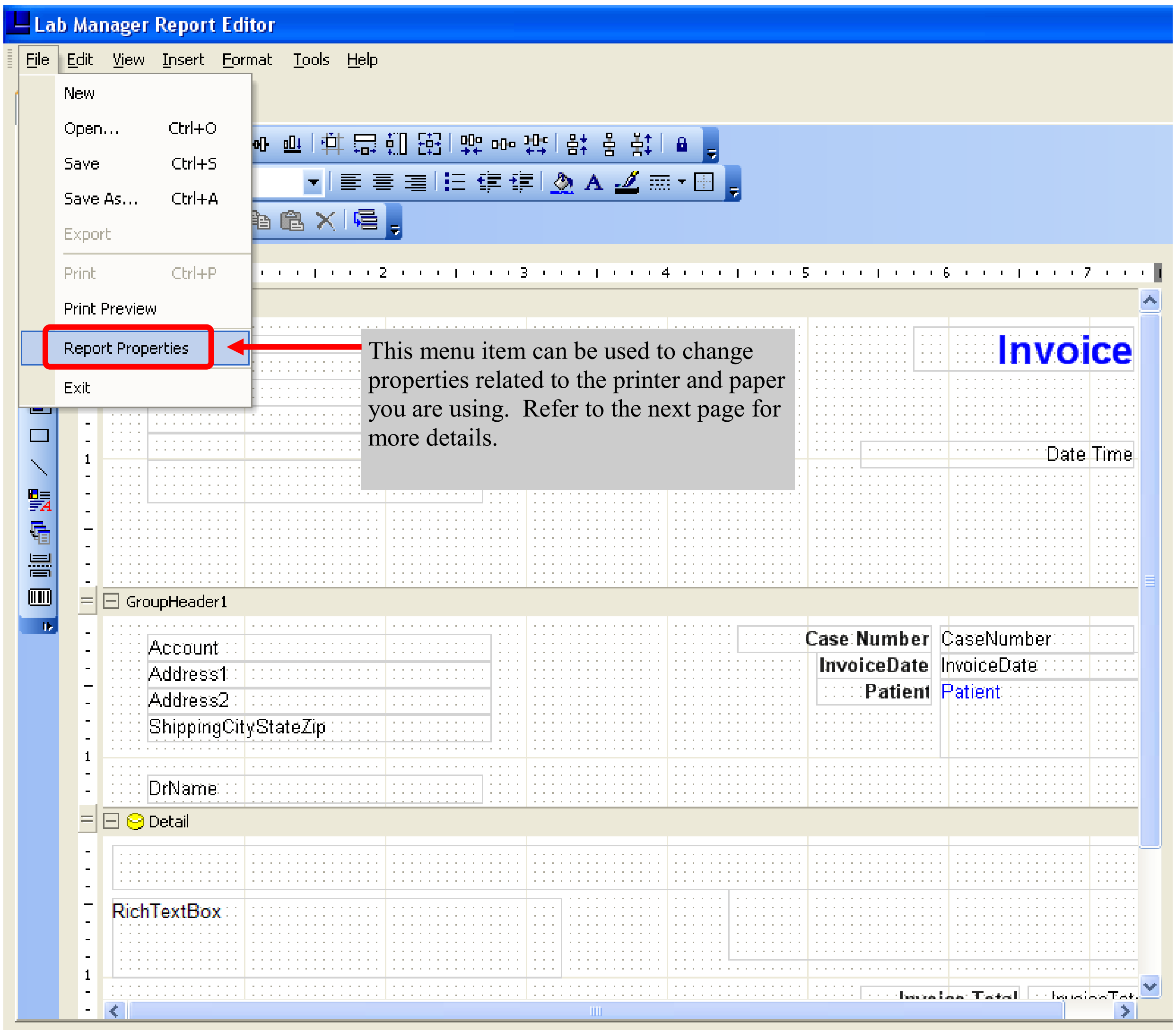
Use these tools to select a line style (solid or dashed) and to select a border style (the box around an object).

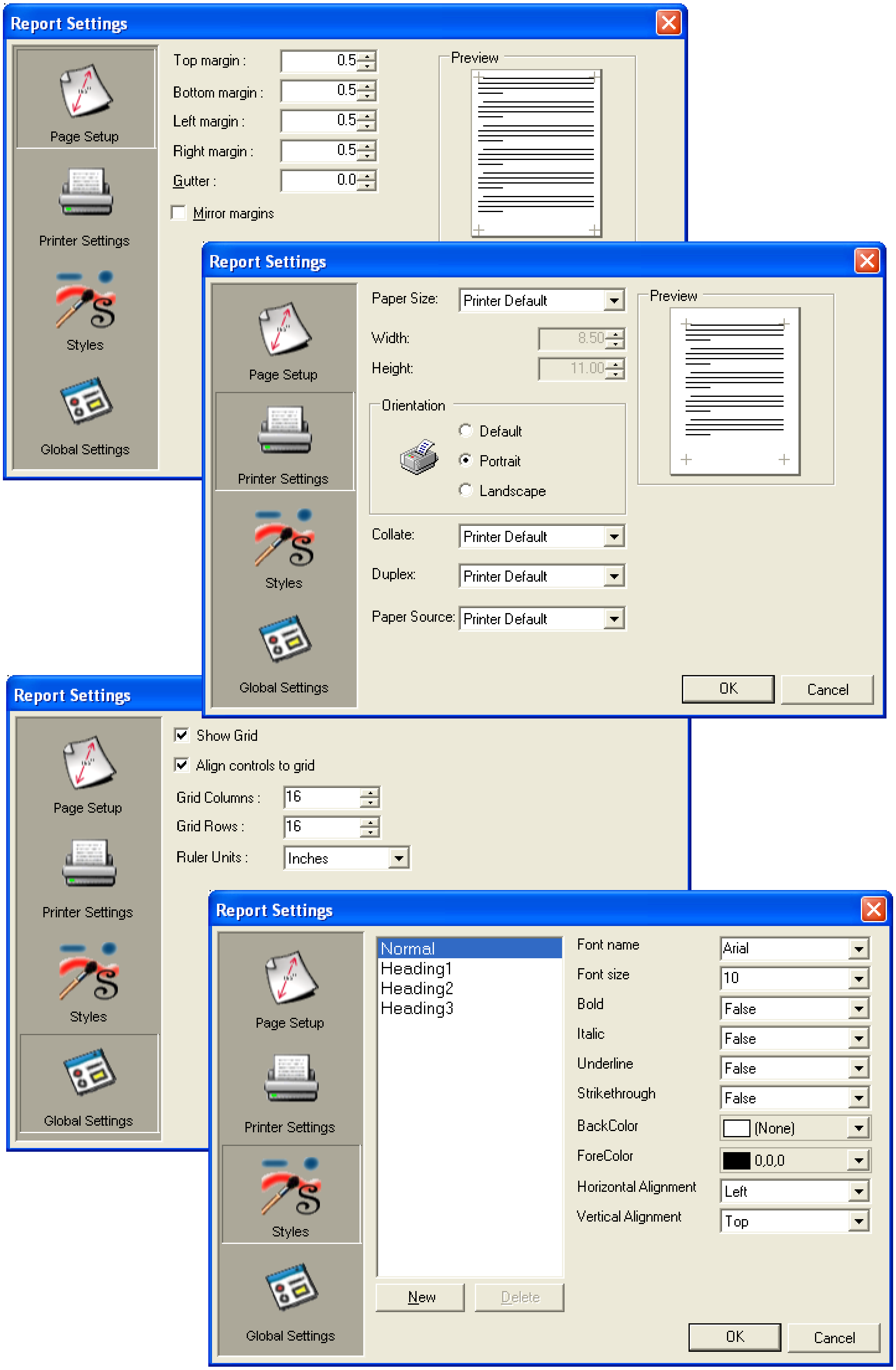


Use this tool to un-do a change you just made to an object.

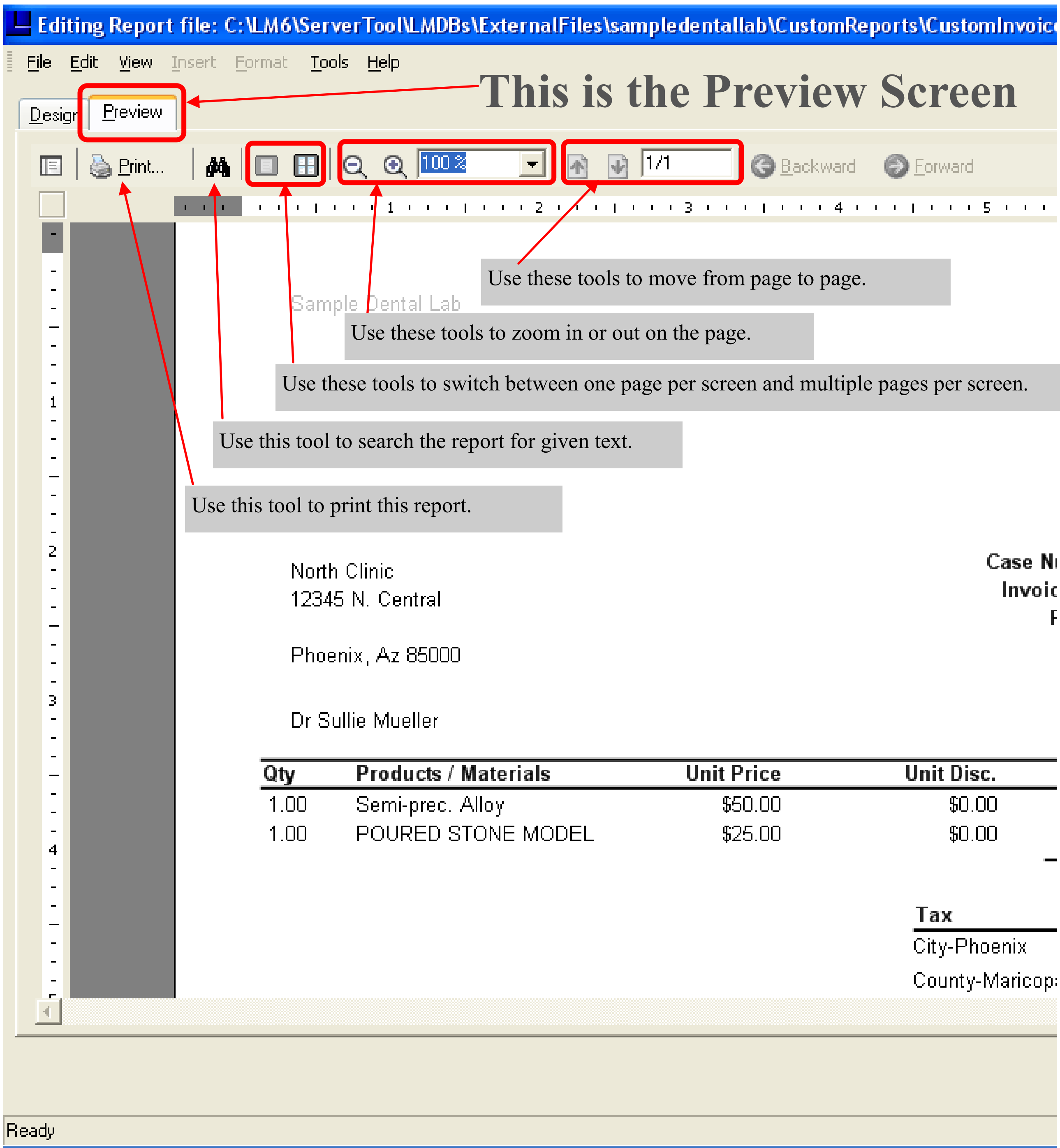
Use these tools to cut, copy and delete objects.

The Parts of Report Designer




Report Settings
Page Setup
Printer Settings
Styles
Global Settings
Top margin : 0.5
Bottom margin : 0.5
Left margin : 0.5
Right margin : 0.5
Gutter : 0.0
Mirror margins
Preview
Report Settings
Paper Size: Printer Default
Width: 8.50
Height: 11.00
Orientation
Default
Portrait
Landscape
Collate: Printer Default
Duplex: Printer Default
Paper Source: Printer Default
OK
Cancel
Report Settings
Show Grid
Align controls to grid
Grid Columns : 16
Grid Rows : 16
Ruler Units : Inches
Report Settings
Normal
Heading1
Heading2
Heading3
Font name Arial
Font size 10
Bold False
Italic False
Underline False
Strikethrough False
BackColor (None)
ForeColor 0,0,0
Horizontal Alignment Left
Vertical Alignment Top
New
Delete
OK
Cancel

The Parts of Report Designer



Managing Reports

Identifying a Report

The best way to identify what form the user is using is to go to the **Manage Reports** section of the program. This can be found by going to System>Control Panel>Manage Report using the menu bar at the top of the screen. Once there, you will see a screen like the one to the left.

To find out which invoice form is in use, scroll down until you see “Invoices” in the center column. Then just look to the right to see which form is currently being used for invoices. In this case it is the LSR Main form.

As mentioned on a previous page, there can be two or more pieces to a report. In this case, the invoice is made up of the “Main” portion of the report along with two sub-reports; one for the details and the other for the tax totals.

Saving a New Report

As Lab Manager won’t let you make changes to a built-in form or report, it is easier to start with a built-in report or form and then after making your changes, use the “Save As” function (File>Save As) to save the report under a different name in the “Custom Reports” folder. We recommend using a naming system like the following;

CustomInvoiceMain
CustomInvoiceDetail
CustomInvoiceTaxTotals

Notice that there are no spaces in the file-name and each custom report or form starts with the word “Custom” to indicate it is a custom item. Also notice we identify which portion of the report it is adding “Main” or “Detail” or “TaxTotals” to the end of the name.

Now that you have established which form you are using, you can start making changes to the built-in form using the design function and save those changes under a new name as described above.

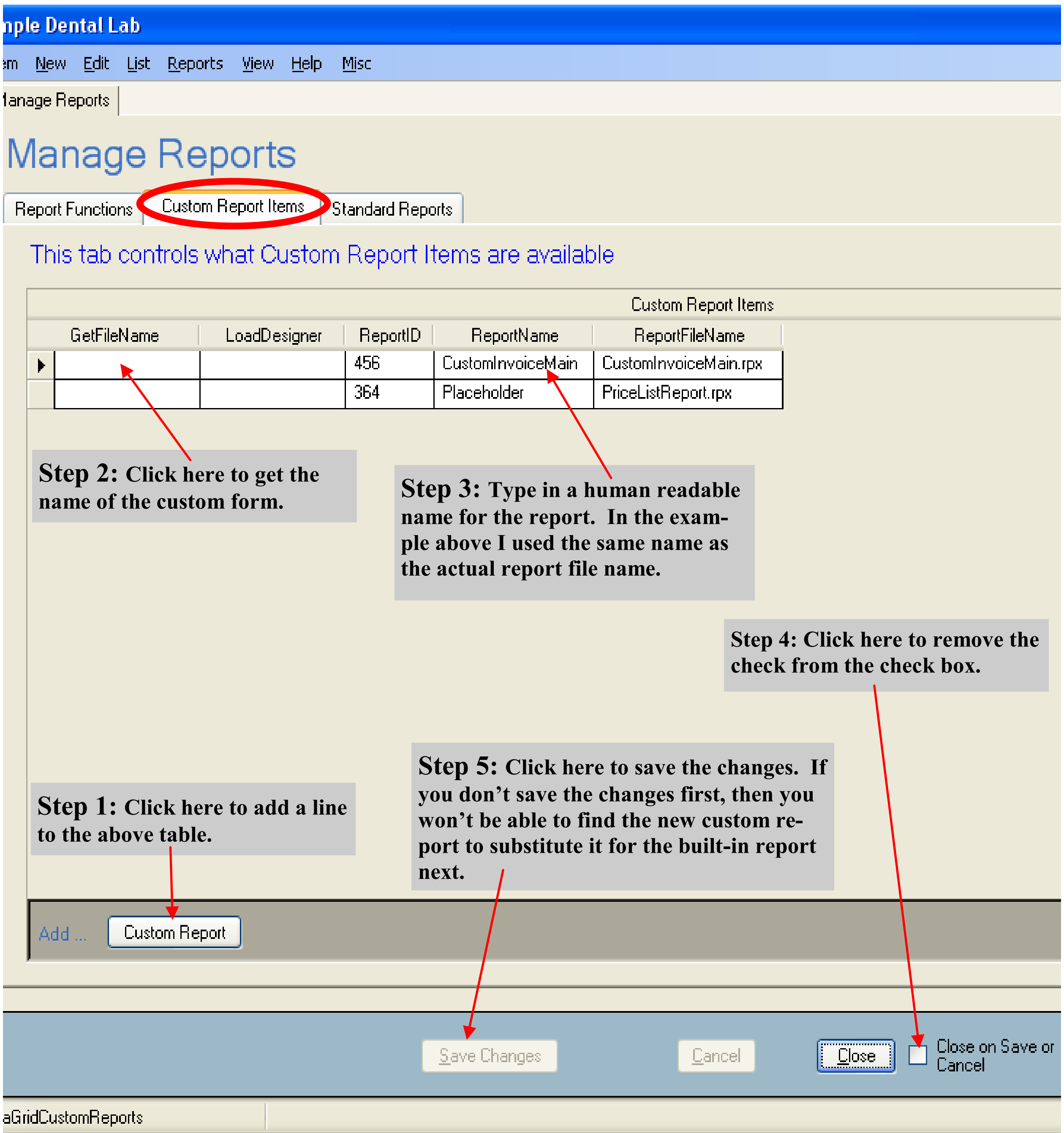
After you have created the new Custom Report, the next page will show you how to add it to Lab Manager and then substitute it for the existing form or report.

Adding a Custom Report:

After you have created a custom report or sub-report using the report designer, you will need to add the item to the list of custom report items in Lab Manager (**System>Control Panel>Manage Reports**), then click on the **Custom Report Items** tab.

To add a custom report item, follow the steps shown to the left.

Note: The ReportFileName is the actual name the report was saved with and should not contain spaces. The ReportName is a human readable description you must give to the report. This name can have spaces. It is this description that is used in Lab Manager elsewhere.



Managing Reports

Substitute a custom Invoice for a default Invoice:

Go to the Report Functions tab as show to the left (**System>Control Panel>Manage Reports**) and locate "Invoices" in the list (center column) then click on the drop down list button in the third column and locate the custom report you want to use. In this case we are using the "CustomInvoiceMain" invoice form that we saved in the Custom Report area on the previous page.

You will notice that custom reports have a green background color in the drop down list to distinguish them from default reports.

If you customized a sub-report or sub-form like the detail area of the invoice, be sure to make that substitution on this screen as well.

Editing Sub-forms or Sub-reports:

Sometimes you need to make changes to a sub-form or report such as adding tooth numbers or shade to the product area on the invoice. To do this, you must use the "Standard Reports" tab shown to the left. This area lists all of the reports and their sub-reports. For example, to modify the detail area of the LSR invoice, find it listed in the forth column and then click on the button in the first column (LoadDesigner) to launch the Invoice Report Filter so that you can click on the Design button to make changes to the sub-report.

When you have finished making your changes, be sure to save the sub-report using the "Save As" function and save the report in the Custom Reports folder giving the report a name such as "CustomInvoiceDetail".

Then you can add the new custom report to the list of custom reports as described earlier in this document. Finally, substitute the new custom sub-report earlier. In this case, look for Invoice Detail in the center column and select your new detail report in the forth column and save changes.

Published by
LSG Publishing

2733 N Power Rd. #102 PMB 488, Mesa, AZ 85215

2733 N Power Rd. #102 PMB 488, Mesa, AZ 85215

Support: (602) 264-5913
Sales: (800) 677-1120
FAX: (602) 279-3633
sales@labsysgrp.com
www.labsysgrp.com