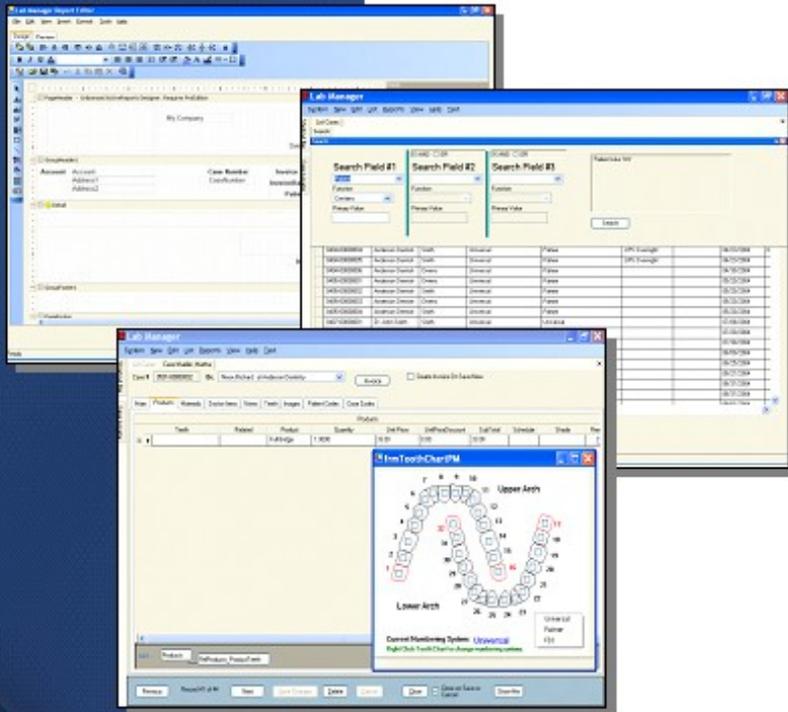


Premium *LabManager*™

Custom Report Generator Manual



Published by
LSG Publishing

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



Software Copyright © 1981-2006 Laboratory Systems Group, Inc. All rights reserved

Documentation Copyright © 1981-2006 Laboratory Systems Group, Inc. All rights reserved

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.

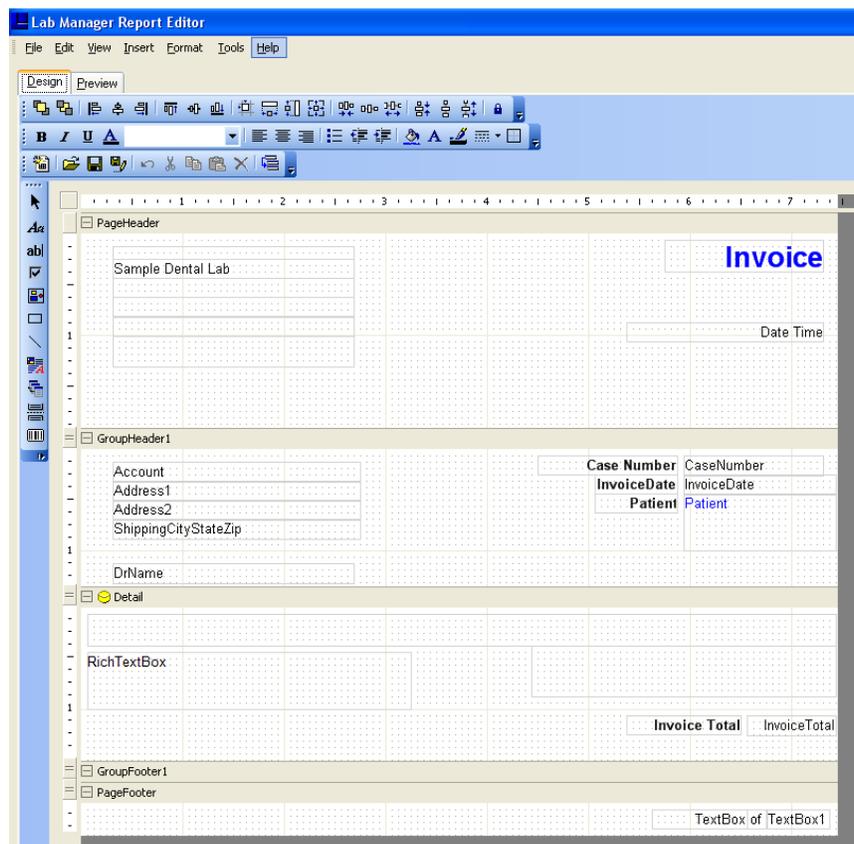
This document demonstrates these concepts by showing you how to modify the LSR invoice form, however, these same concepts apply to all reports and forms.

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

Lab Manager Report Editor

File Edit View Insert Format Tools Help

This is the Report Designer Screen

Design Preview

Below is a typical invoice form ready for editing

PageHeader

Sample Dental Lab

Invoice

Date Time

GroupHeader1

Account

Address1

Address2

ShippingCityStateZip

DrName

Case Number CaseNumber

InvoiceDate InvoiceDate

Patient Patient

Detail

This rectangle represents a completely separate report designed to show the products and materials on the invoice

This field contains notes entered on the case that are to appear on the invoice.

This sub-report shows the tax information.

Invoice Total InvoiceTotal

GroupFooter1

PageFooter

These fields show the page number such as Page 1 of 2

TextBox of TextBox1

Main Form or Report

Sub-Reports

The Parts of a Report

The screenshot displays the 'Lab Manager Report Editor' interface. At the top, a menu bar includes 'File', 'Edit', 'View', 'Insert', 'Format', 'Tools', and 'Help'. Below the menu is a toolbar with various icons for report design, and a text formatting toolbar with options for bold, italic, underline, and text color. The main workspace is a grid-based design screen. On the left, a vertical toolbar contains icons for selection, text alignment, and other design tools. The design screen is divided into several sections, each with a descriptive callout box:

- PageHeader Section:** This area is for items that are to appear at the top of ALL forms. Reserve this area for things like the Today's Date, the Company name and address and other text that applies to all pages of every invoice. The callout points to a box containing 'Sample Dental Lab' and a 'Date Time' field.
- Group Header Section:** This area is for items that change from one invoice to another; things like the account name, case number, and patient name. The callout points to a box containing 'Account', 'Address1', 'Address2', 'ShippingCityStateZip', and 'DrName'.
- Detail Section:** This area is for the detail items on the invoice which includes products and materials. This area usually has two or more sub-reports showing up as blank rectangles. These sub-reports are edited separately. The callout points to a 'RichTextBox' and an 'Invoice Total' field.
- Group/Page Footer Sections:** Used for page number and the like. The callout points to a 'PageFooter' section containing a 'TextBox of TextBox1'.

The 'Design' tab is highlighted in the top-left corner, and a red arrow points to it with the text 'This is the Design Screen'.

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 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.

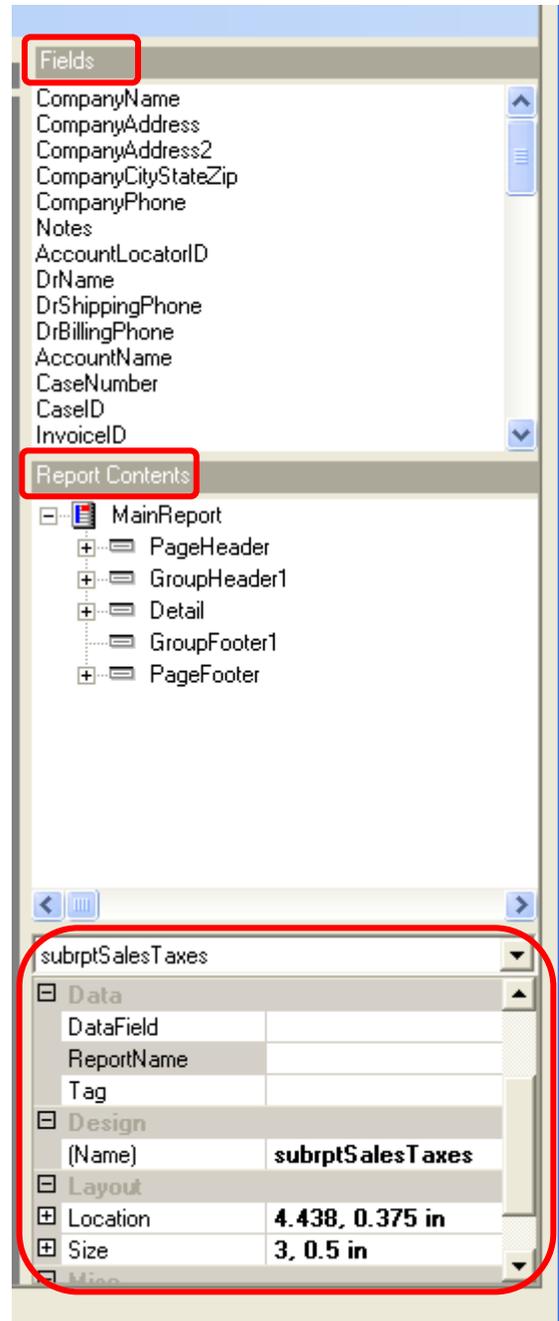
Report Contents:

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 screenshot shows the Lab Manager Report Editor interface. The menu bar includes File, Edit, View, Insert, Format, Tools, and Help. The Design tab is active, showing a toolbar with various icons for text, alignment, and layout. A vertical toolbar on the left contains icons for selection, text, graphics, and lines. The main workspace displays a report design with a grid background. The report includes sections for PageHeader, GroupHeader1, Detail, GroupFooter1, and PageFooter. The Detail section contains a table with columns for Case Number, InvoiceDate, and Patient. The report also features a RichTextBox and an Invoice Total field. Red arrows point from the left toolbar to specific tools, each with a descriptive text box.

Click here to select the selection tool. This tool turns your mouse pointer back into a selector used for moving and selecting objects on the report.

Use this tool to place text or labels on the report. For example, you would use this tool to add a text message to the report or to add a label to identify a field.

Use this tool to create a new field on the report. However, in most cases, fields will be added to a report by dragging them from the field list.

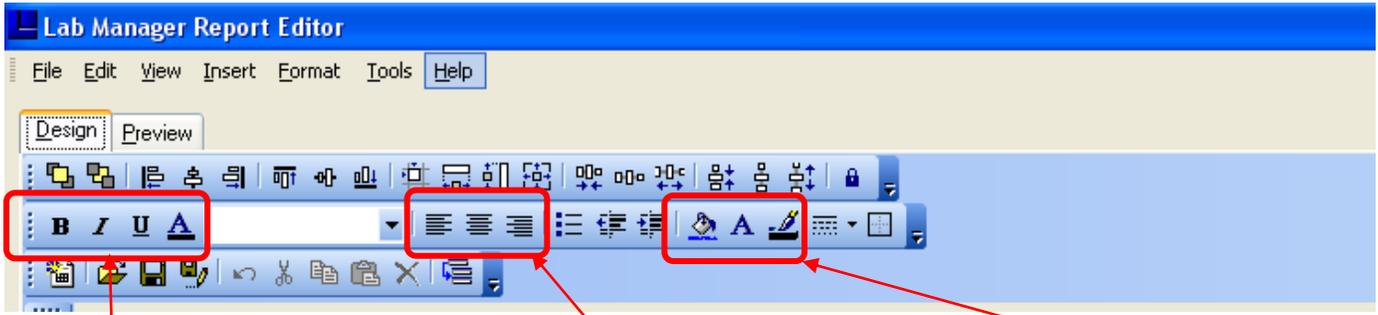
Use this tool to add a check box to the report.

Use this tool to add a graphic to the report.

This tool can be used to add a rectangle or box to the report.

Use this tool to add lines to the report.

The Parts of Report Designer

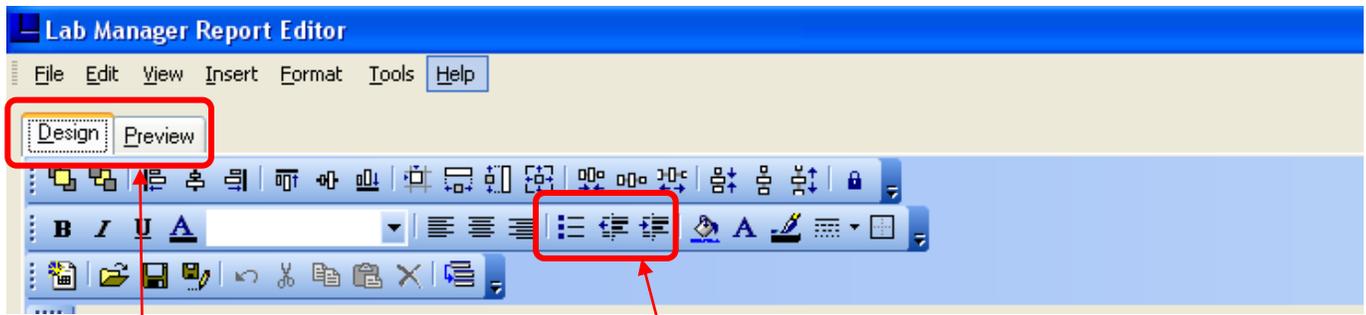


The screenshot shows the 'Lab Manager Report Editor' window with a menu bar (File, Edit, View, Insert, Format, Tools, Help) and two tabs: 'Design' and 'Preview'. The 'Design' tab is active. A toolbar below the tabs contains various icons. Three red boxes highlight specific groups of icons: the first box contains the Bold (B), Italic (I), Underline (U), and Text Color (A) icons; the second box contains the Left, Center, and Right alignment icons; the third box contains the Background Color, Text Color, and Line Color icons. Red arrows point from these boxes to explanatory text boxes below.

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.



The screenshot shows the 'Lab Manager Report Editor' window with the same menu bar and tabs as the previous image. Two red boxes highlight the 'Design' and 'Preview' tabs, and a group of list creation icons (bulleted list, numbered list, and bulleted list with indentation) in the toolbar. Red arrows point from these boxes to explanatory text boxes below.

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;

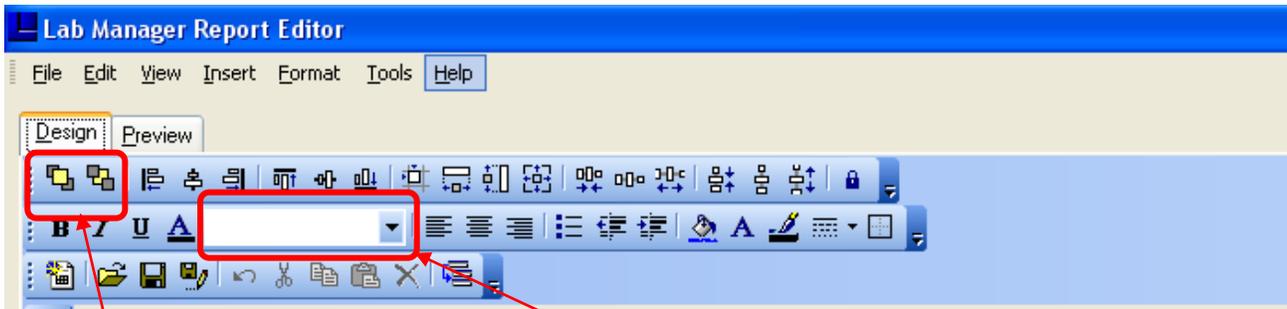
- Item number 1
- Item number 2
- Item number 3



The screenshot shows the 'Lab Manager Report Editor' window with the menu bar. The 'File' menu item is circled in red. A red arrow points from the circle to an explanatory text box below.

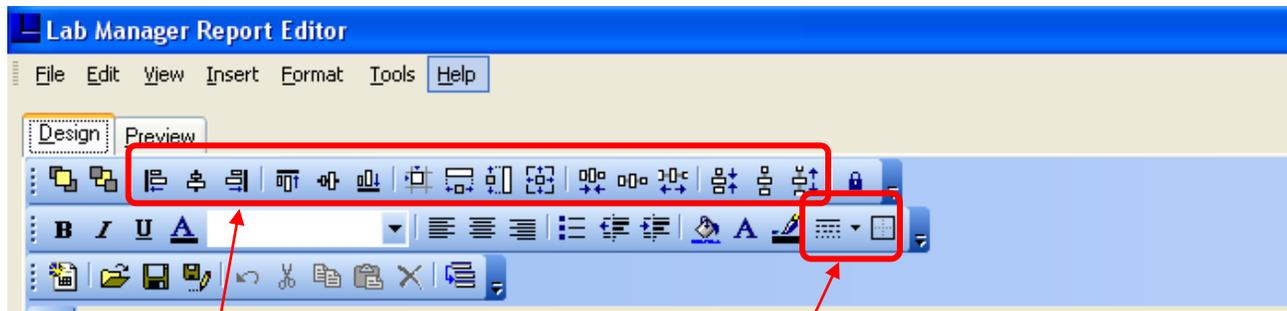
Use this menu item to save your changes and to print a sample of the report. Also located under File, is an item called Report Properties which is used to change margins and other page related properties.

The Parts of Report Designer



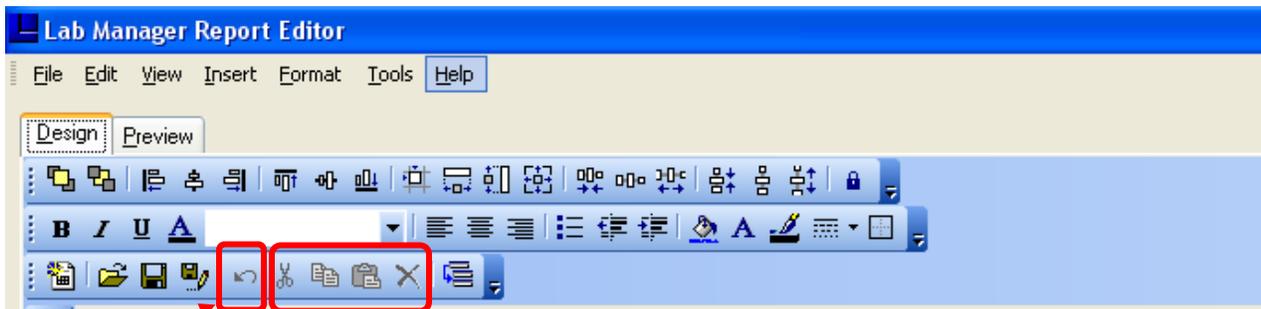
Use these tools to move an item behind or in front of another object.

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 between objects.

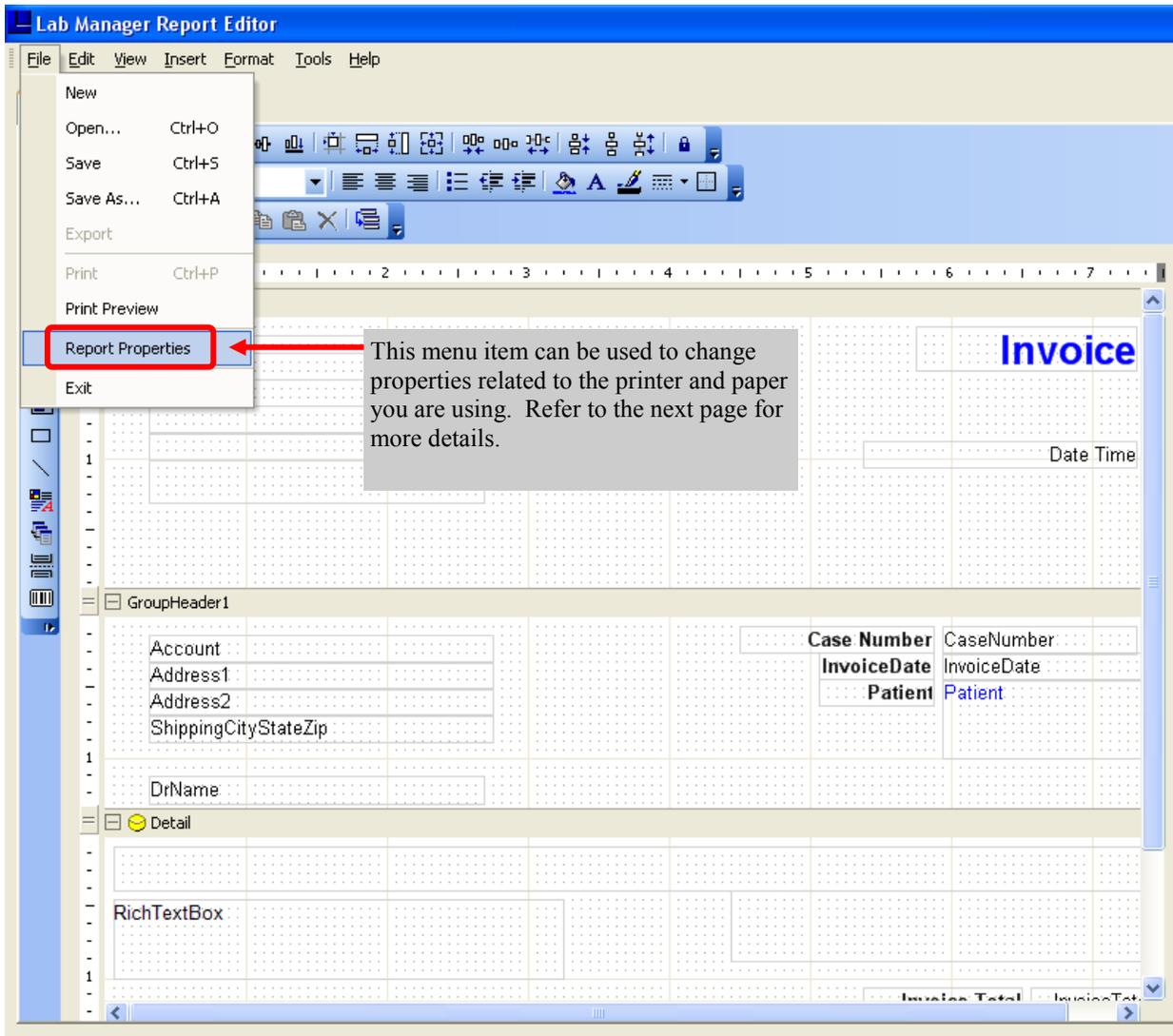
Use these tools to select a line style (solid or dashed) and to select a border style (the box around an object).

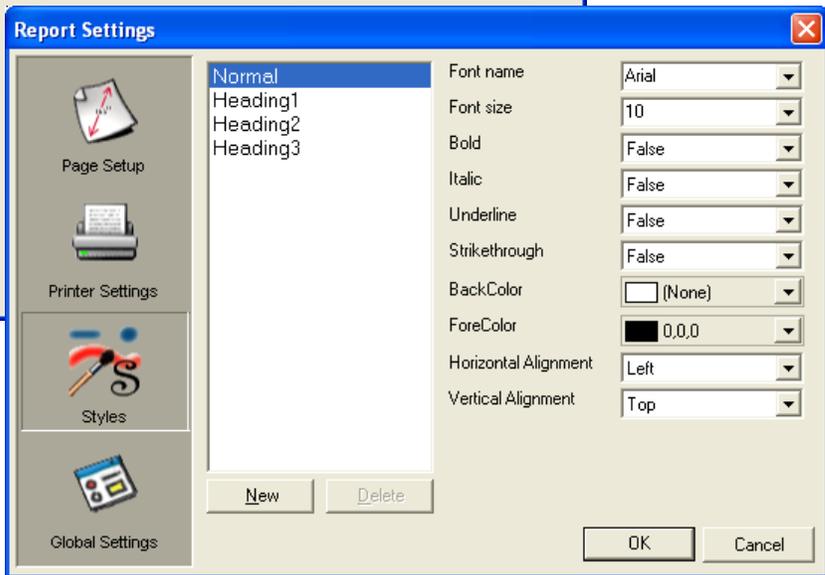
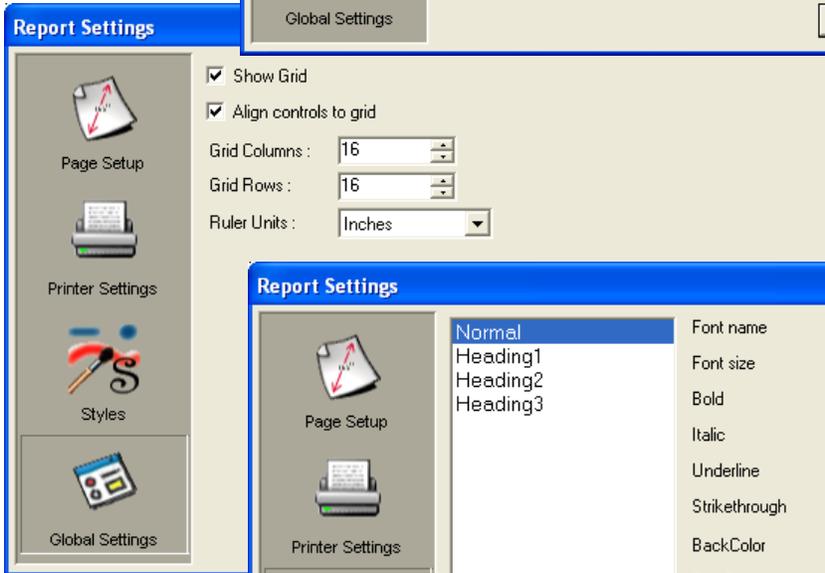
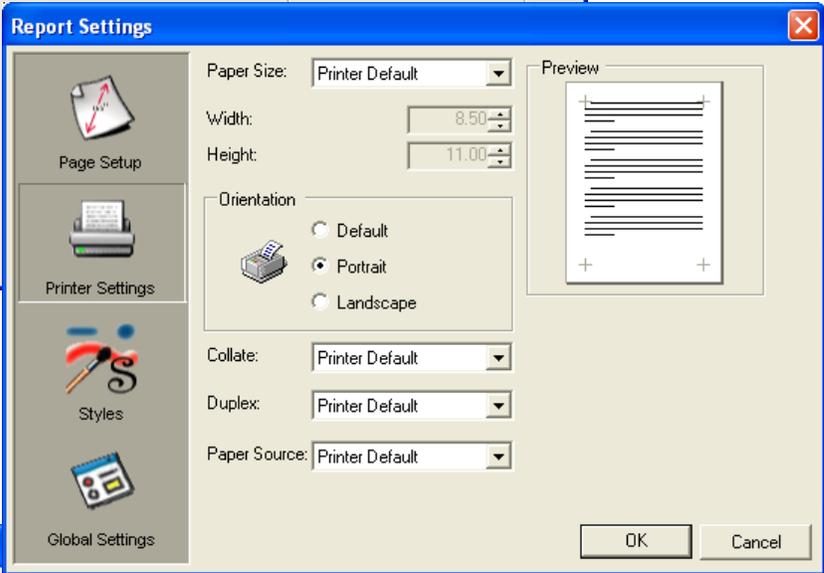
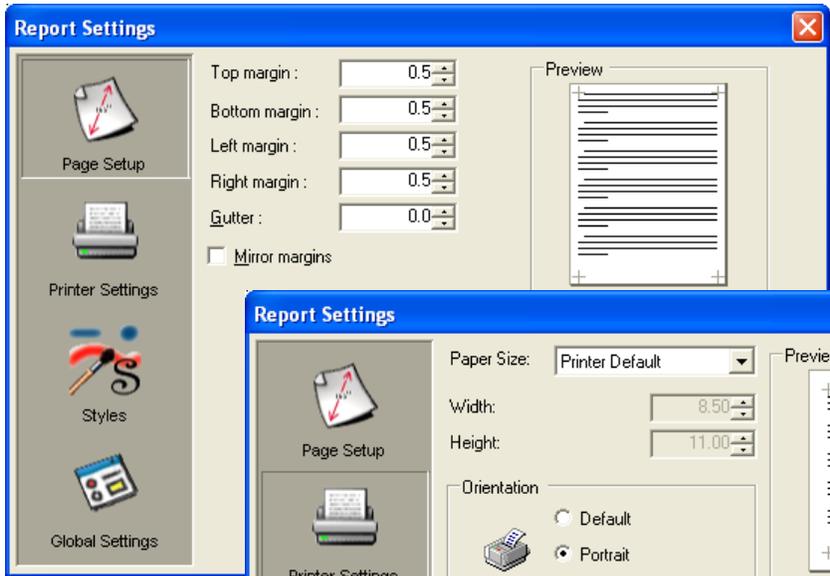


Use this tool to un-do a change you just made to an object.

Use these tools to cut, copy and delete objects.

The Parts of Report Designer





The Parts of Report Designer

Editing Report file: C:\LM6\ServerTool\LMDBs\ExternalFiles\sampledentallab\CustomReports\CustomInvoice

File Edit View Insert Format Tools Help

Design Preview

Print... [Page Navigation] [Zoom: 100%] [Page: 1/1] Backward Forward

Use this tool to search the report for given text.

Use this tool to print this report.

Use these tools to switch between one page per screen and multiple pages per screen.

Use these tools to zoom in or out on the page.

Use these tools to move from page to page.

Sample Dental Lab

North Clinic
12345 N. Central
Phoenix, Az 85000
Dr Sullie Mueller

Case No
Invoice
F

Qty	Products / Materials	Unit Price	Unit Disc.
1.00	Semi-prec. Alloy	\$50.00	\$0.00
1.00	POURED STONE MODEL	\$25.00	\$0.00

Tax
City-Phoenix
County-Maricop:

Ready

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.

Sample Dental Lab

File New Edit List Reports View Help Misc

Manage Reports

Manage Reports

Report Functions **Custom Report Items** Standard Reports

This tab controls what Custom Report Items are available

GetFileName	LoadDesigner	ReportID	ReportName	ReportFileName
		456	CustomInvoiceMain	CustomInvoiceMain.rpx
		364	Placeholder	PriceListReport.rpx

Step 1: Click here to add a line to the above table.

Step 2: Click here to get the name of the custom form.

Step 3: Type in a human readable name for the report. In the example above I used the same name as the actual report file name.

Step 4: Click here to remove the check from the check box.

Step 5: Click here to save the changes. If you don't save the changes first, then you won't be able to find the new custom report to substitute it for the built-in report next.

Add ... Custom Report

Save Changes Cancel Close Close on Save or Cancel

aGridCustomReports

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.

The screenshot shows the 'Manage Reports' window in the 'Sample Dental Lab' application. The window has a menu bar with 'System', 'New', 'Edit', 'List', 'Reports', 'View', 'Help', and 'Misc'. Below the menu bar, there are three tabs: 'Report Functions', 'Custom Report Items', and 'Standard Reports'. The 'Report Functions' tab is selected and highlighted with a red circle. Below the tabs, there is a table with three columns: 'AppReportID', 'AppReportName', and 'ReportName'. The table contains 18 rows of data. The 'Invoices' row (AppReportID 31) is highlighted with a red circle. The 'ReportName' column for the 'Invoices' row is set to 'CustomInvoiceMain', which is highlighted with a green background and a red circle. At the bottom of the window, there are 'Save Changes' and 'Cancel' buttons. The status bar at the bottom left shows 'uddReportItems'.

AppReportID	AppReportName	ReportName
24	Doctors List	Canned Products Price List
27	Employees Labels	Case Tracking
26	Employees List	Cases At A Glance
28	Flighttags	Cash Receipts
29	General Journal	Collections
70	Invoice Detail	Collections Aging SubReport
30	Invoice Register	Current Sales
69	Invoice Register Non Payment SubR	CustomInvoiceMain
68	Invoice Register Payment SubReport	Delivery List
79	Invoice Register Short	Departments List
71	Invoice Sales Tax	Doctor Labels Avery 5160
31	Invoices	Doctor Labels Avery 5161
32	Invoice Labels	Doctor Labels Avery 5164
33	Lab Status	Doctor Labels Avery 5199
35	Marketing Contacts Labels	Doctor Labels Avery 6490
34	Marketing Contacts List	Invoice Labels Avery 5160
36	Material Dept Analysis	Marketing Contact Labels Avery 5160
37	Material Price List	Marketing Contacts List
38	Material Production	Material Price List
		Material Production

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.

Sample Dental Lab

System New Edit List Reports View Help Misc

Manage Reports

Manage Reports

Report Functions Custom Report Items **Standard Reports**

This tab lists the Standard Reports that ship with Lab Manager

LoadDesigner	ReportID	ReportName	ReportFileName
	397	Invoice-DBL-QC-Detail	rptInvoice_DBL_QC_Detail
	396	Invoice-DBL-QC-Main	rptInvoice_DBL_QC_Main
	398	Invoice-DBL-QC-TaxTotals	rptInvoice_DBL_QC_TaxTotals
	395	Invoice-DBL-Taxtotals	rptInvoice_DBL_TaxTotals
	409	Invoice-Label1-Detail	rptInvoice_Label1_Detail
	408	Invoice-Label1-Main	rptInvoice_Label1_Main
	410	Invoice-Label1-TaxTotals	rptInvoice_Label1_TaxTotals
	412	Invoice-Label2-Detail	rptInvoice_Label2_Detail
	411	Invoice-Label2-Main	rptInvoice_Label2_Main
	413	Invoice-Label2-TaxTotals	rptInvoice_Label2_TaxTotals
Button	400	Invoice-LSR-Detail	rptInvoice_LSR_Detail
	399	Invoice-LSR-Main	rptInvoice_LSR_Main
	401	Invoice-LSR-TaxTotals	rptInvoice_LSR_TaxTotals
	383	Invoice-Plain-Detail	subrptInvoiceDetail
	232	Invoice-Plain-Main	rptInvoice
	384	Invoice-Plain-TaxTotals	subrptInvoiceSalesTax
	403	Invoice-QC-Detail	rptInvoice_QC_Detail
	402	Invoice-QC-Main	rptInvoice_QC_Main
	404	Invoice-QC-TaxTotals	rptInvoice_QC_TaxTotals
	406	Invoice-QC2-Detail	rptInvoice_QC2_Detail
	405	Invoice-QC2-Main	rptInvoice_QC2_Main

Save Changes Cancel

ultraGridStandardReports

Published by
LSG Publishing

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

Software Copyright © 1981-2006 Laboratory Systems Group, Inc. All rights reserved

Documentation Copyright © 1981-2006 Laboratory Systems Group, Inc. All rights reserved

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