

SOP TRANSACTION REPORT
GENERATOR

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SOP TRANSACTION REPORT GENERATOR

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AIM

The following explains how to create a customized report (one not found in the system) for a specific user or user group. You can create and run an unlimited number of such reports.

PROCEDURE

STAGE ONE: CREATING THE REPORT

1. Enter the Transaction Report Generator form.
2. Record a Report Title. This is the title that will appear at the top of each report printout, as well as in the menu of reports to run.
3. Enter the sub-level form, Report Columns, and select the columns to include in the report (from the Choose list).

Tip: You can change the title of any column displayed in the report by leaving the line, returning to it and revising the Title.

Important Note: The sequence of columns in the generator determines the order in which they are displayed in the customized report (as well as the default sort for the report data). To change the position of a column that you have already included in the report, do the following:

- Delete the line in which it appears.
 - Move to the line immediately above the one in which you want to insert the column and open a new line (Ctrl + Enter).
 - In the new line, reselect the column in question.
4. To define the column as an input column for the report, flag the Input column. When the report is run, such columns will appear in the Parameter Input Screen.
 5. To revise the column width, change the value in the Width column.
 6. By default, report records are first sorted by the data in the first column, then by the second, and so on. If you want a different column to determine the primary sort, flag the Sort column in the appropriate line.
 7. To add a new column to the report (one not in the Choose list):
 - Move to a blank line in the Report Columns sub-level form.
 - Record a title for the column in the Title column and approve the warning message that appears.
 - Change the Width, as desired (the default is 20 characters).
 - If this is to be an input column in the report, flag the Input column.
 - Use the Expression column to define a mathematical formula that determines the values appearing in this report column. To refer to an existing column in the expression, specify # before its column number. (For example: If #130*0.75 is the expression defining a given column, its output would be 0.75 times the value of the data in column 130.)
 8. To allow all users access to this customized report, return to the upper-level form and flag the General Use column.
 9. Make sure the In Use column is flagged.

STAGE TWO: RUNNING THE REPORT

1. Run the Run Transaction Report program.
2. Select the title of the report you have designed and click OK.