

Running Reports

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Overview

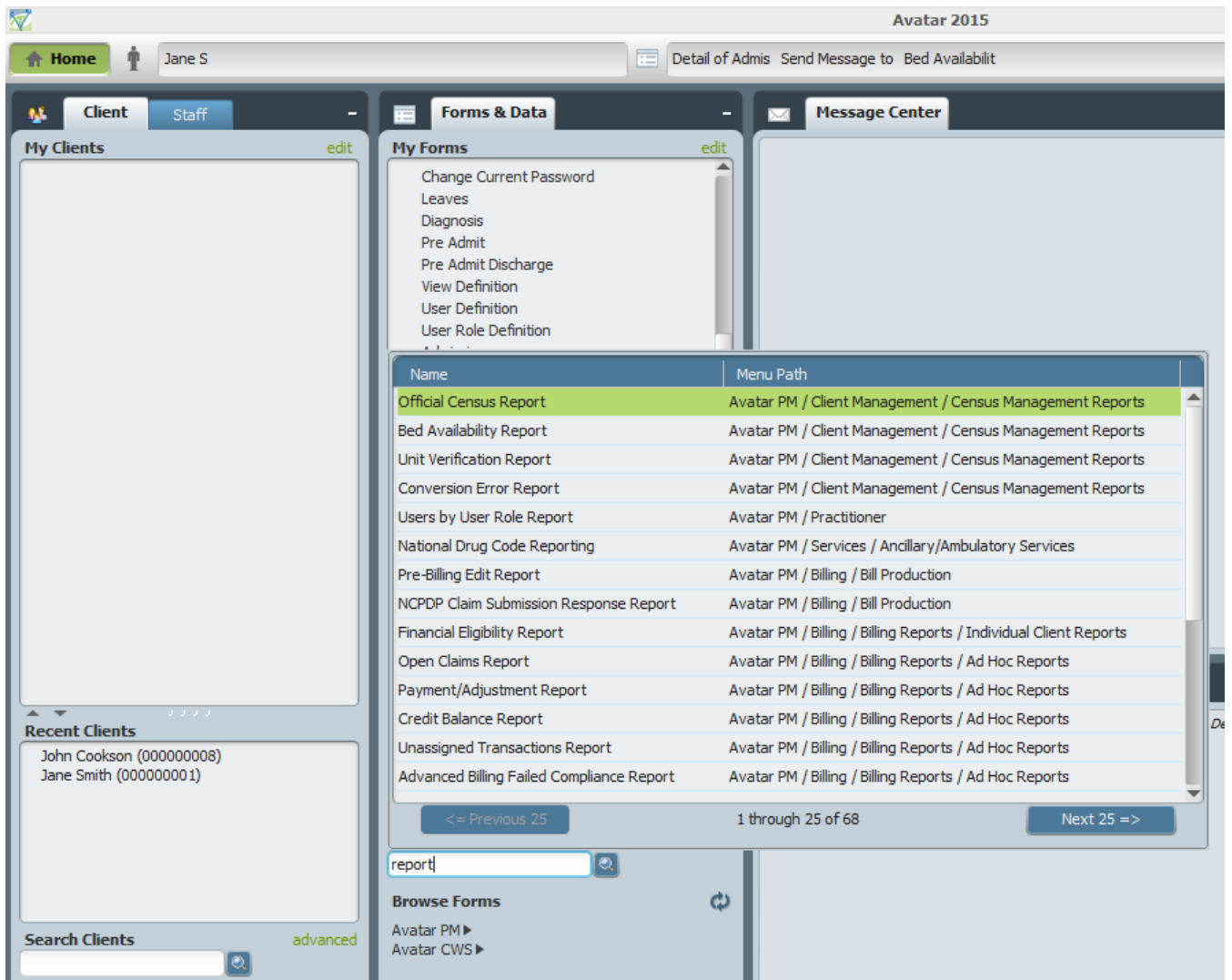
Process used to search for, select, tailor, and print reports of Avatar data. Reports can either be stock reports or Crystal Reports.

Applicable Staff

All Avatar users with sufficient access can view and print reports. Please note that when printing any information from Avatar that it may contain HIPAA protected information and it must be properly secured at all times.

Usage

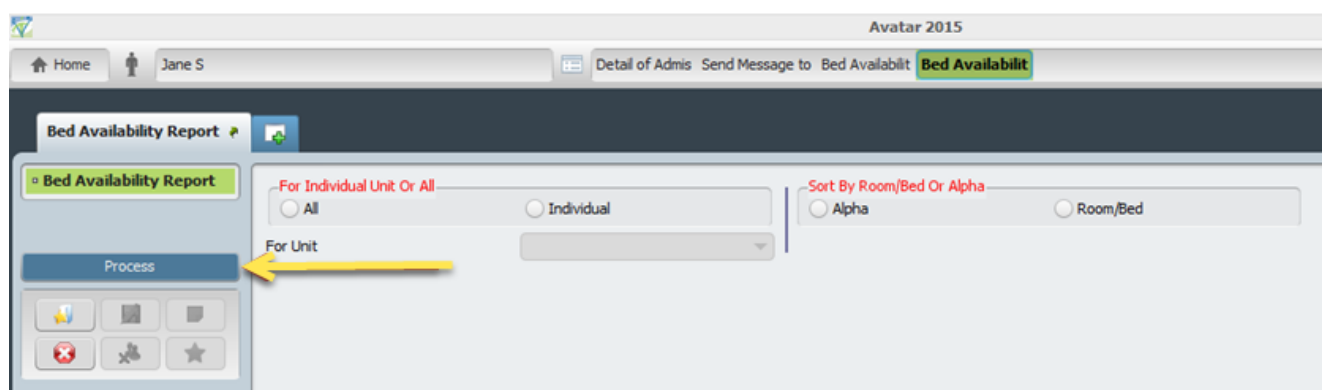
Search for the report you wish to view. Either use the **Search Forms** section of the **Forms & Data** widget, follow the desired menu path if known, or select it from **My Forms** if it is saved there. When searching forms, a live search window appears which narrows results as you enter more information:



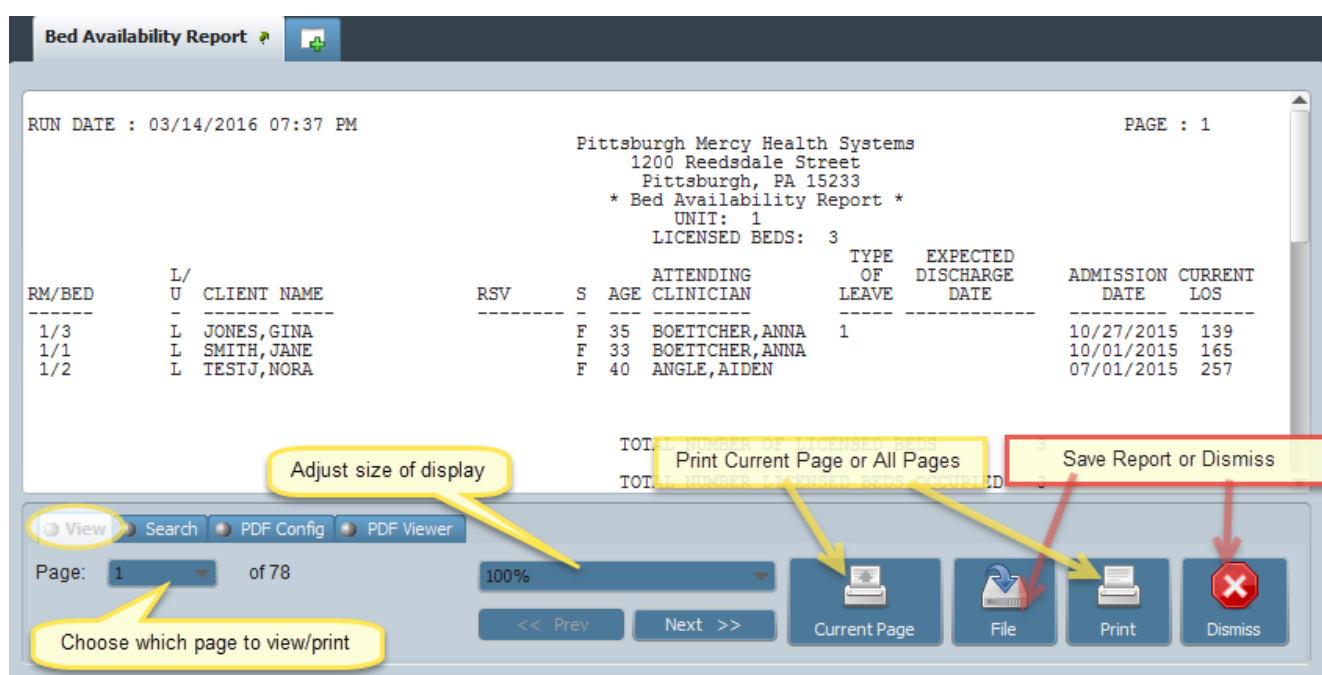
Select the form and double-click or press the Enter key to open. As with all Avatar forms, any **Red** fields are required information (refer to Field Types information in the Forms Article here. Using a Form The 2 types of reports that can be used are Stock Reports and Crystal Reports.

Stock Reports

The following example is a Bed Availability Report. Stock reports (also known as Classic or Avatar Reports) will have similar functionality. Enter as much information as required and desired. **Red fields** are required and **must be completed** before the report can be created. Select the **Process** button when complete.



Stock reports will be displayed in a separate window and allow further tailoring and/or examination of data, along with saving and/or printing the report.



The first tab below the report (shown above) is **View**. The Page dropdown allows selection of any page in the document and shows that page. Selecting the **Current Page** button will print that page. Selecting **File** allows saving of the report (refer to your company's guidelines about saving protected patient information). **Print** will print the entire report. Select **Dismiss** to close the report when you have no further need of it.

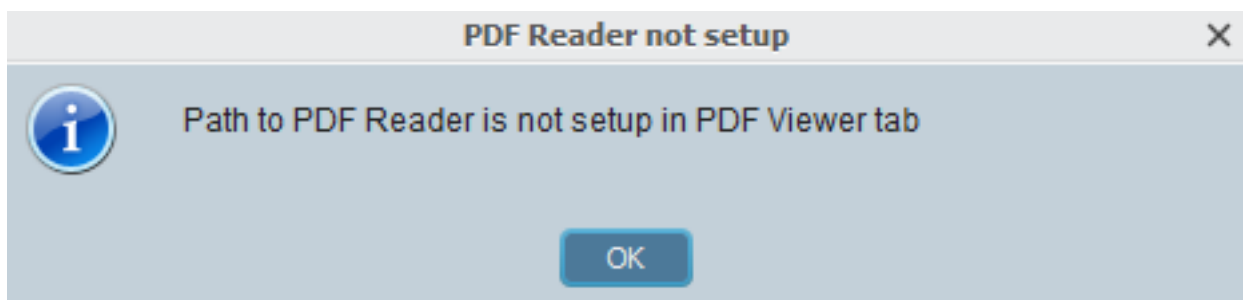
The second tab is **Search**. You can search for text in the report and specify whether or not the results must be the whole word and match the search case. Click the **Search** button to complete the action and see results.

The screenshot shows the 'PDF Config' tab selected. It features a 'Text to search for:' label above a text input field and a 'Search' button. To the right, there are two checkboxes: 'Search Whole Word' and 'Match Case', both of which are currently unchecked.

The third tab is **PDF Config**. This allows you to set the Top/Left of the page either as default or custom. Clicking **Add** allows you to enter a name for your custom configuration. Click **Create PDF** to complete the action.

This screenshot shows the 'PDF Config' tab with more details. It includes a dropdown menu set to 'Netsmart Suggested', and 'Add', 'Delete', and 'Save' buttons. Below these, it states 'Left/Top values are in points (1/72 of an inch)' with input fields for 'Left' (18) and 'Top' (11). A checked checkbox indicates 'Set as default Left/Top Setting'. A note at the bottom says '"Print" Button launches PDF Viewer using default Left/Top set...'. On the right, there are 'Create PDF' and 'Dismiss' buttons.

If this error message appears, go to the **PDF Viewer** tab to complete the set up of the viewer.



The fourth tab is **PDF Viewer**. It allows mapping the system to your PDF viewer program. If you do not know the path, please contact your system administrator. Click **Browse** to navigate to the viewer program, then select **Apply** to complete the action.

The screenshot shows the 'PDF Viewer' tab. It has a label 'Path to PDF Viewer' above a text input field. To the right of the input field are two buttons: 'Browse' and 'Apply'.

Crystal Reports

Crystal Reports will be created in much the same way as Stock Reports but will present with slight differences, including opening in a separate window. After the desired information about report parameters (facility, dates, etc.) is entered and the report is processed, Crystal Reports will show the

following type of information:

Admission Date	Time	EP #	Client ID/Name	S.S. #	Date Of Birth	Type of Admission
7/1/2015	07:01 AM	1	TESTJ,NORA	182-60-2253	4/29/1975	Admission
Admission Practitioner: No Entry Admission Diagnosis: Mild intellectual disabilities						
10/1/2015	02:33 PM	1	SMITH,JANE	No Entry	12/1/1982	Admission
Admission Practitioner: No Entry Admission Diagnosis: DEPRESSIVE DISORDER NOS						
10/27/2015	02:54 PM	1	JONES,GINA	No Entry	7/1/1980	Admission
Admission Practitioner: No Entry Admission Diagnosis: Depressed						

There are options to **Export**, **Print**, and **Search** the report. If Exporting the report, click this button:



to open the Export dialog box. From here you can choose the format of the report and the destination for saving. Click **OK** to export the report, or **Cancel** to stop the operation.

Export

Format:

Destination:

Description:
 Adobe Acrobat format is a page-based format that produces documents intended for printing and redistribution. Acrobat format will export both formatting and layout consistent with the report's appearance on the Preview tab.

Another version of a Crystal Report is shown below in the **Vitals Entry** Form: a report embedded in a

form that can be compiled in the form itself. When choosing the **Vitals Reports** Section, options for selecting various vital signs are presented and Start/End dates must be chosen. When desired elements have been selected, click the **View Report** button to create the report.

The screenshot shows the Avatar 2015 software interface. At the top, there's a navigation bar with 'Home', 'John C', 'Detail of Admis', 'Preferences', 'Lock', 'Sign Out', 'Switch', 'Help', and 'SYSADM'. Below this, a patient header for 'JOHN COOKSON (000000008)' displays 'M, 43, 02/27/1973' and 'Ht: 5' 11", Wt: 170 lbs, BMI: 23.7'. A red alert icon indicates 'Allergies (2)'. The main area has tabs for 'Chart', 'Vitals Entry', and 'Vitals Reports'. The 'Vitals Reports' tab is active, showing a 'Vital Sign For Graph' dropdown set to 'Blood Glucose' and a 'View Graph' button. Below, a 'Vital Sign(s) for Report' list includes 'Blood Glucose' (checked), 'Blood Pressure' (unchecked), and 'Ht/Wt/BMI' (checked). To the right, date and time pickers are set for 'Start Date' (03/01/2016), 'Start Time' (01:49 PM), 'End Date' (03/02/2016), and 'End Time' (01:49 PM). Buttons for 'View Report' and 'Launch Growth Chart' are at the bottom. A left sidebar contains 'Submit', 'Online Documentation', and other utility icons.

 - "Vital Sign(s) for Report is limited to 9 selections from the selection box. This limitation is necessary for the crystal report to correctly display the results."

Tips & FAQ

Always follow your company's policies on protecting client information. When printing or storing protected information please retain it as required and out of view.

All reports are time/date stamped and attached to your electronic signature/identity. This information is auditable.

Previous versions of Avatar referred to Stock Reports (Bed Availability above) as "Yellow Reports" because the screens were shaded yellow when created to differentiate them from Crystal Reports. You

may hear them referred to in this way today.

Technical Information

Menu Location (Avatar Menu Path)

SQL Table(s)

RAD Envelope (if applicable)

Related Forms and Reports (data from one form feeds another report/form)

Posted by: **John Cookson** - Tue, Feb 23, 2016 at 7:49 PM. This article has been viewed 4056 times.

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