Creating Your Own Reports
With the Smart Report Suite

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Creating Your Own Reports with the Smart Report Suite

What is the difference between ‘srs’ and ‘srsgen’?

- Use ‘srs’ to generate a report containing useful data
- Use ‘srsgen’ to alter the details appearing in a report
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*srs* - Smart Report Suite

- Contains dozens of **standard** reports, grouped into various categories.
- Contains a special category for **Custom/Homegrown** reports.
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Let’s view a sample ‘srs’ report:

- Start ‘srs’
- Select “Scheduling Reports”
- Select “Appointments by Location, Date, and Provider (‘pnpscan’ style)”

Let’s customize this report to make it even more useful! To do this, we need to run ‘srsgen’ (F8)
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The ‘srsgen’ main screen:

- F1 - Add new report
- F2 - Edit existing report
- F8 - Delete custom report
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Adding/Editing reports in ‘srsgen’ involves three steps:

1. Select **Data Source** *(changing this is uncommon)*
2. Select **Columns** to display *(changing this is very common)*
3. Select **Sort/Subtotal** *(changing this is somewhat common)*

After customizing a report, ‘srsgen’ will allow you to test your changes, and then save, tweak, or discard them.
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Let’s modify an existing report:

- To start, press <F2> to “Edit/Customize Existing Report”
- Select “Scheduling Reports”
- Select “Appointments by Location, Date and Provider (‘pnpscan’ style)”

1. Select Data Source
2. Select Columns to Appear
   - Use F3 to Delete the ‘Magic Word’ column from the report
3. Select Sort/Subtotal

... and test your changes!
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NO REPORT RESTRICTIONS ARE APPLIED DURING TESTS!

To test your report layout, ‘srsgen’ requires data, so no restrictions are applied at this point. Apply restrictions later through ‘srs’ when actually running the report!
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Do you want to save, tweak, or forget your changes?

When saving, you can either:

- Save as a new **Custom/Homegrown** report
- Replace an existing **Custom/Homegrown** report
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Let’s modify this same report some more:

1. Select Data Source
2. Select Columns to Appear
   - Use F2 to Insert the ‘Home Phone Number’ column into the report
   - Use F2 to Insert the ‘Personal Balance’ column into the report
   - Use F2 to Insert the ‘Last Personal Payment’ column into the report
3. Select Sort/Subtotal

… and test your changes!
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Now let’s modify a different report:

- To start, press <F2> to “Edit/Customize Existing Report”
- Select “Payment Reports”
- Select “Payment Totals by User Who Posted, Check Number, and Insura”

1. Select Data Source
2. Select Columns to Appear
3. Select Sort/Subtotal
   - Sort by “Payor Group” and then by “Check Number”
   - Subtotal for each “Payor Group” and for each “Check Number”

... and test your changes!
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Adding a New Report

- To start, press <F1> to "Add a New Report from Scratch"
  1. Select desired data source
     ○ Use ‘Patient Demographic and Policy Reports’
  2. Select desired output columns
     ○ Add useful fields like ‘first name’, ‘last name’, ‘birthdate’, ‘phone #’, etc
  3. Select desired sort/subtotal options
     ○ Choose how you would like the data sorted
     ○ You probably don’t need subtotals for a demographic report like this

Test the report, make further changes if necessary, and then save it!
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Deleting A Custom Report

- To start, press <F8> to “Delete Report”
- Select custom report of choice
- Press <F1> to delete selected report for all users
- Deleted reports are *not* recoverable!
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For more information on these and other PCC programs, check out:

http://learn.pcc.com