

How you can reach us.
 Support: (602) 264-5913
 Sales: (800) 677-1120
 FAX: (602) 279-3633
 E-mail sales and support at:
 sales@labsysgrp.com
 support@labsysgrp.com
 Visit us online at:
 www.labsysgrp.com

(Cont. from Page 3) See your custom report appear sorted and filtered the way you choose.

Step 10: Save your report so you don't have to set it up again. Click on **File** in the upper left corner of the screen and click on **Save As**. Choose a place to save the report and give it a name you will recognize later and then click on the **Save** button. The next time you want to see the report, start Excel and click on **File** and then on **Open**. Locate the file you saved and open it.

The report will appear, however, it remembered the last date you asked it to filter on so you will want to edit that date to get an up-to-date report.

Select the report by highlighting columns A through F and then click on **Data** and then click on **Import External Data** and then click on **Edit Query**. Click **Next** to get to the Filter window and simply change the filter date. Then click **Next**, and then **Next**, and then **Finish** to complete your changes. Your updated report will appear.

	A	B	C	D	E	F
1	CaseNumber	Status	AccountID	Patient	ShipByDate	ShipByTime
2	0306-0006	C		Mueller, Mary Loo	6/25/2003 0:00	
3	0306-0005	O		Mueller, Mary Jane	6/25/2003 0:00	
4	0306-0004	O		Mueller, Bill-Bob	6/25/2003 0:00	
5	0301-0001	C		Mueller, Sullie	6/25/2003 0:00	11AM
6	0212-0001	O		Mueller, Tom	6/25/2003 0:00	
7	0211-0001	O		9 Johnson, Martha	6/25/2003 0:00	
8						

July 2003

Connections

The Newsletter for Lab Manager Users



Letter from the President

Lab Manager and the User's Conference Update

On May 29th, our software engineer, announced that the health problems he had been experiencing had become so severe that as of that day he was unable to continue programming. That meant his exclusive, two year **Version 6** project would need to be turned over to someone else. This came as a huge shock, as he had been assuring us that **Version 6** would be ready for the scheduled preview on June 6th the following week.

We quickly assessed the situation and decided that if there was interest in **Version 5**, we would hold the conference as scheduled. Forty-five users from across North America joined us for a very positive 2 days of training in Scottsdale. **Greg Harris's** marketing seminar was a big hit. He is a very dynamic and entertaining speaker. He scored a 9.7 out of 10.

In spite of last minute changes to the format, the attendees overwhelming voted the conference a huge success, as evidenced by the "Repeat Attendees". These are users who have attended multiple conferences over the years. During an open discussion period several "repeaters" commented on how amazing it was that no matter how

many years they attended, they came away with so much valuable, new information every time. The **Lab Manager** seminars scored 9.1 out of 10.

"Live" Custom Reports

During the Saturday afternoon session, I discussed ways to get "live" reports on **Lab Manager** data using **Microsoft Excel**. For example: "Live" billing information that changes throughout the day as cases are billed. "Live" production information that changes as cases are finished. Even a "live" delivery list can be produced.

This topic created so much excitement that I decided to include step-by-step instructions in this issue of the newsletter. See page 2.

Programmer Update

We have been extremely fortunate to secure a new programmer who is already hard at work finishing **Version 6**.

Craig is a talented programmer who has worked for Intel and has an extensive background with complex software projects and tight time tables. He has worn many hats: Systems Architect, Web Designer, Software and Database Developer, Technology Manager, Data Modeler, and IT Consultant. In the last 12 years, he's done it all!

We will keep you updated on our progress in the next **Connections** newsletter. We appreciate your understanding.

Creating Custom Reports Using Excel

Creating custom reports is easier than you might think if you have **Microsoft Excel** installed in your computer. This is because **Lab Manager** was produced using **Microsoft Access**, one of the **Microsoft Office** applications. All of the Office applications work very well together. These applications include **Word, Excel, Access, Publisher, and PowerPoint**.

In the past, I have talked about creating reports using **Excel** to open the **Lab Manager** database and I have also talked about copying **Lab Manager** data and pasting it into **Excel**. This article, however, discusses a very different method to create custom reports using **Excel**. This method allows you to create a report, sorted and filtered just the way you like and then save the report in such a way that the next time you load the report in **Excel**, the data shown in the report will reflect the data in **Lab Manager** as of that moment. In other words, each day you load the report, it will be accurate as of that very moment. Because the report is actually "Live", if you are using **Lab Manager** on a network with other people entering data into it, you can click on a "refresh" button in **Excel** and see the report change right before your eyes to reflect changes in the **Lab Manager** database made by others on the network.

Think of the possibilities. Live billing information that changes throughout the day as cases are billed. Live production information that changes as cases are finished. Even a live delivery list can be produced this way.

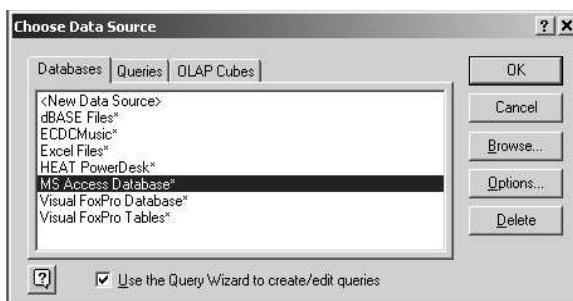
If you ever wanted to create custom reports in **Lab Manager**, this is your ticket. Here are the steps to create your own reports.

Step 1: Start **Excel**. **Lab Manager** does not have to be running since **Excel** is only interested in the data. I am using **Excel 2002**, the version that comes with **Microsoft Office XP**.

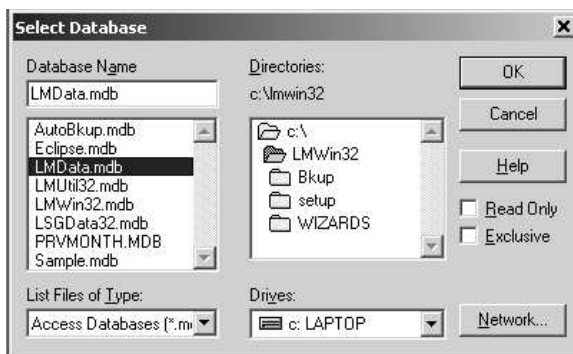
The same steps should work the same if you are using an older version of **Microsoft Office**.

Step 2: Move the mouse to the top of the screen and click on **Data** and then move the mouse down to **Import External Data** and then finally, click on **New Database Query**.

Step 3: Choose **MS Access Database** in the list of **Databases** and click on the **OK** button.

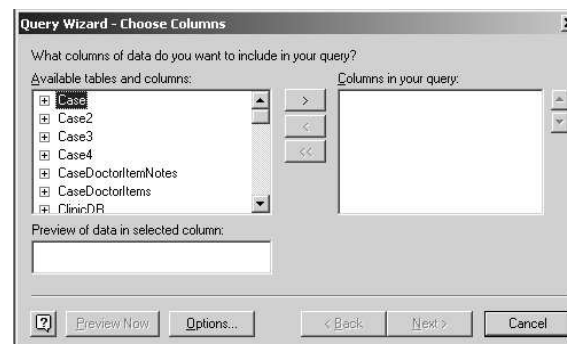


Step 4: Use the "Select Database" window to locate your data. For most of you, it will be **LMData.mdb** on the **C:** drive in the **LMWin32** folder. If you are using **Lab Manager** on a network, use the **Select Database** window to locate your data on the server and then click **OK**.

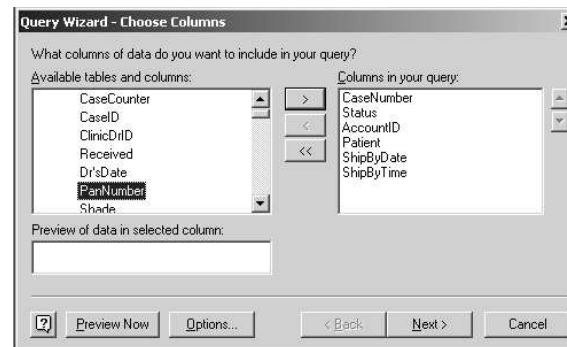


Step 5: Use the **Query Wizard** to select the information you want to see on your report. Each of the items in the list represent tables that contain **Lab Manager** data. For example, the **Case** table contains case and invoice information. The **Doctor** table contains doctor information.

When you click on the "+" plus symbol next to a table, you will see the fields in the table. The fields are the individual pieces of information in that table such as case number, case status, Due date, Ship-by Date, invoice date, invoice amount, etc.

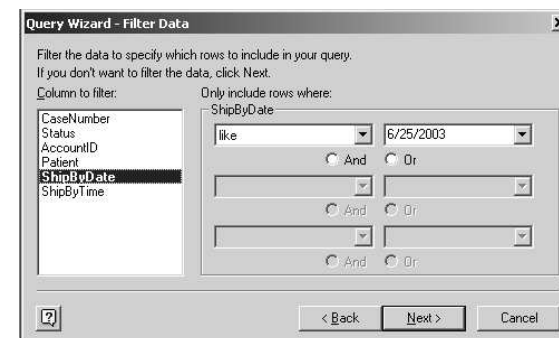


Step 6: In this example, I would like to create a "Ship-by" report, so I have chosen the **Case** table and then chose the **CaseNumber**, **Status**, **AccountID**, **Patient**, **ShipByDate**, and **ShipByTime** fields. This is done by clicking on the desired field and then clicking on the ">" button, one by one until you see something like the windows below. When finished selecting the fields, click on the **Next** button.

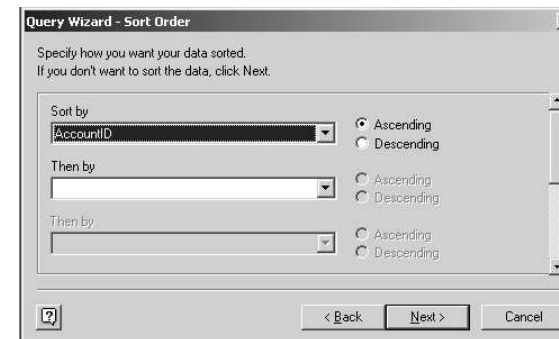


Step 7: Now you can select how you want to filter the data. In this example, I have chosen to filter by the **ShipByDate** field so that I can get a report showing only those cases with a certain Ship by Date. Click on **ShipByDate** and then in the field to the right, click on the little drop-down list button and choose "Like" from the list and then finally, further to the

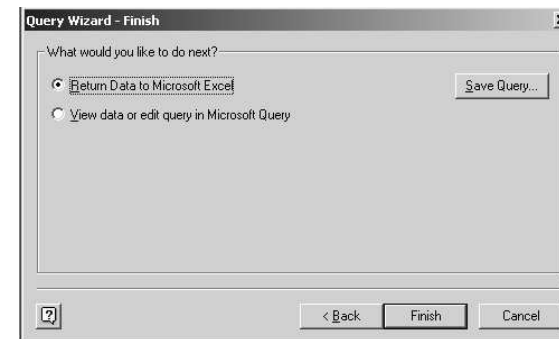
right, type in the desired date or click on the drop-down list button and choose the date you want the report to filter on. I typed in **6/25/2003**. Click **Next** to continue.



Step 8: The next window allows you to select how the report is to be sorted. Use the Drop-down list button and choose **AccountID** if you want to sort by the doctor's ID number. Click on **Next**.



Step 9: Simply click on the **Finish** button.



(Continued on Page 4)