ReportGenie Manual

Installation, setup and use.

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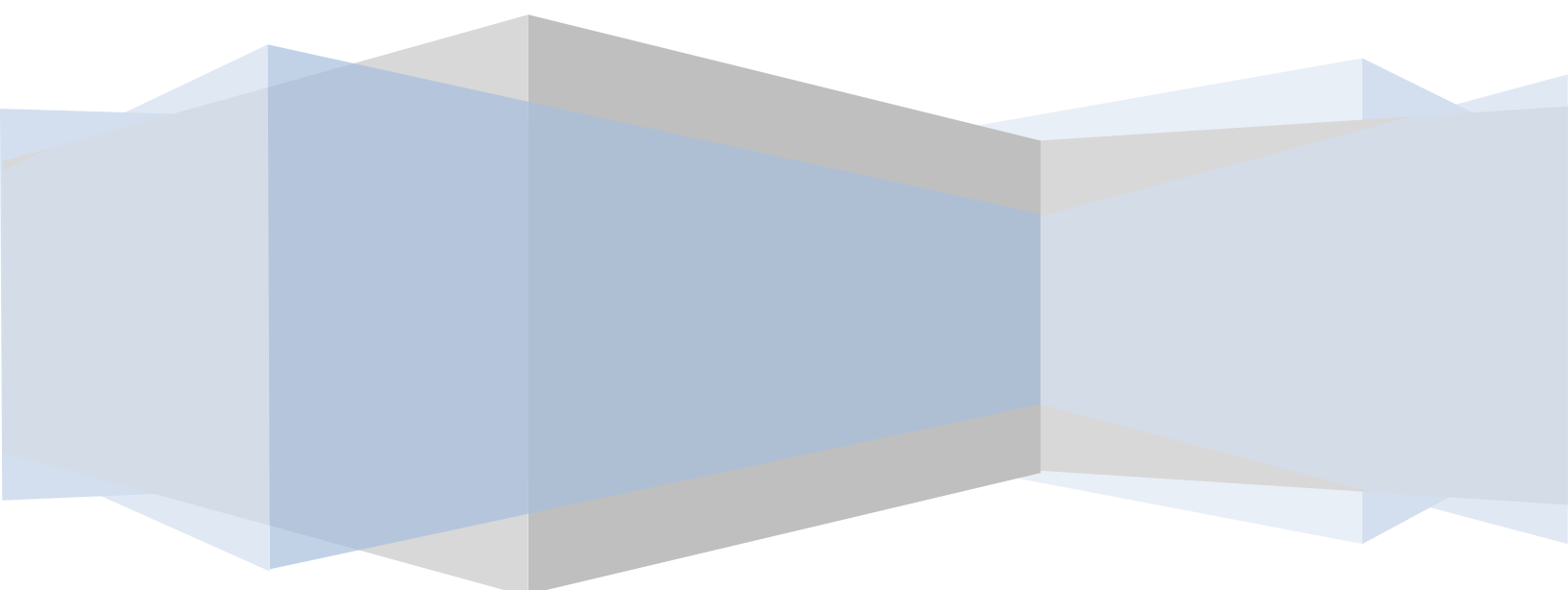
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INTRODUCTION

ReportGenie is a professional Report Generator that enables you to extract, sort, and report on dictation files created on one or more DigiTel Dictation Systems.

ReportGenie enables you to look-up data about specific dictations in an instant. Its powerful Report Criteria, lets you define an unlimited number of reports based on a wide range of criteria. The Report Criteria that you can sort dictation files by includes User Name and Pin, Department Number, Work type Number, Reference Number, File Number, Priority Indication, Dictation Date, Dictation Destination, and more.

ReportGenie is a great way to quickly find out if a particular dictation was dictated and where it was sent for transcription. And it's a great way to prepare reports for client or department invoicing, or just to keep track of workflow.

ReportGenie can be installed on the same pc as DigiTel or on any pc that is connected to the same network that the DigiTel pc is on.

ReportGenie extracts data from DigiTel's Log Books. It can extract data from up to four DigiTel's individually, and it can combine extracted data from up to four DigiTel's.

To help you sort and organize the data, a date range can be easily set so only the data within the range of interest is extracted.

- Extract, sort, and report on dictation files from 1 to 4 DigiTel's Log Books*!*

- Define and save as many reports as desired*!*

- See the sorted dictations on the screen, or save as a file, or print the report*!*

- Find specific dictation in an instant, and create invoices and other reports in a snap*!*

- Use ReportGenie on the same pc as DigiTel or from any pc across a network*!*

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INSTALLATION

Host System Requirements
Pentium II or equivalent or better
Memory: 1 MB or greater
Hard Disk: 4 MB for ReportGenie program and databases.

Optional Network Interface Card: To access Log Books across a network.

Windows 2000 or Windows XP or Windows VISTA (16-Bit versions.)

Software Installation (from the Installation CD or from www.DigiTelSoftware.com)
Login as a user with "administrator rights", and then run the ReportGenie Full Installation program. *During installation, if asked "…do you want to keep this file?" to a pop-up message that says "… a file being copied is older than one on your computer" click "Yes".* Next click OK, then click the big square picture button, then click Continue, and then click OK. After setup is complete, restart the computer.

Make Log Books Folders Shareable (if needed)
If one or more ReportGenie's will be accessing DigiTel Log Books across your network, you will need to make the Log Books folders "shareable" so that each ReportGenie can see those Log Books across your network.

DigiTel's Log Books can be found at c:\Apptec\DigiTel\Log Books.

To make a folder shareable, use Windows Explore to browse to that folder. Then right-click on that folder and choose its Properties. Then set its properties to shareable. You may also need to "map a drive letter" for each shared folder so that each ReportGenie can locate each shared folder by its drive letter.

To tell ReportGenie where to find those shared folders, open ReportGenie's Toolbox, select "Data Source Paths", and then set each Log Path as desired.

Software Registration
The product runs in evaluation mode for 30 days or until it is registered. To register the product open its Registration menu and follow its on-screen instructions or the instructions on the installation CD's label.

The Registration menu displays a "Lock Number", and the Installation CD label shows a "Pop Number". Email both of those numbers to Keys@DigiTelSoftware.com to receive your License Key via email reply.

Once you receive your License Key, enter it into the Registration menu.

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MAIN MENU

The main menu of ReportGenie allows you to choose the Data Source (that is, which DigiTel System's Log Books to look at), and a date range of interest.
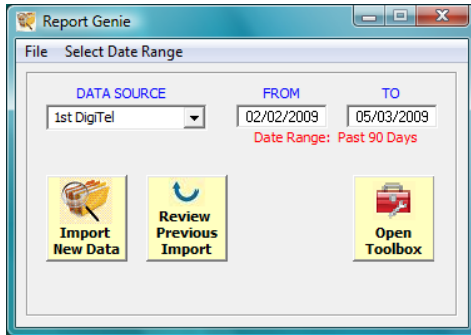
Once you select the **Data Source** and the **Date Range**, click **Import New Data** to import all dictation file data from the selected source that falls within the selected date range.

You may select one of the 4 available DigiTel Data Sources, or you may select **ALL DATA SOURCES** to combine the data from up to 4 DigiTel's.
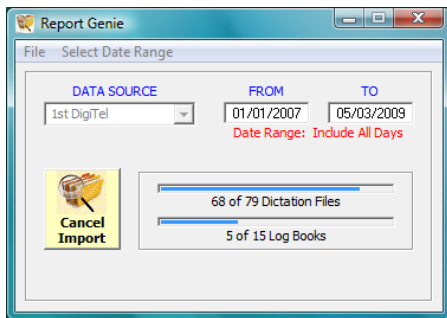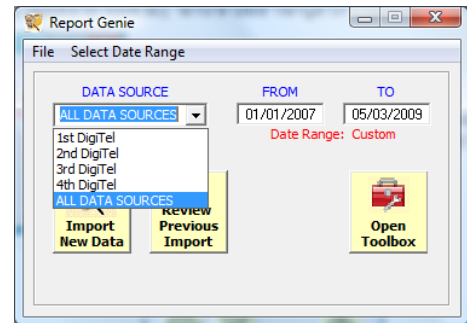
Upon clicking **Import New Data**, you will see the progress of importing, and then the **Reports** menu will open to show you the resulting dictation file data.

You may also view the previous imported data by clicking **Review Previous Import**.

In the **From** and **To** fields, you may enter a custom date range, or you may click **Select Date Range** in the menu to quickly choose from a set of date ranges including Today, Yesterday, Past 5 Days, Past 10 Days, Past 30 Days, Past 90 Days, Past 365 Days, Include All Days, and Custom Range.

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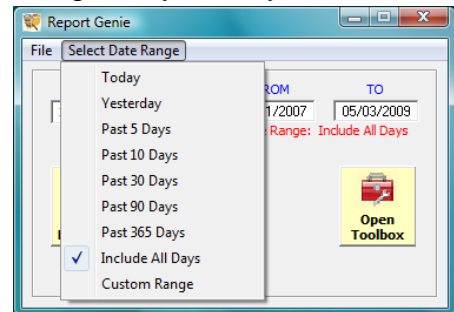
REPORTS

The **Reports** Menu displays a list of the imported dictations from the DigiTel Log Books from the selected Data Source and within the selected Date Range. A reminder of the selected Date Range selected in the main menu is shown at the top right in red.
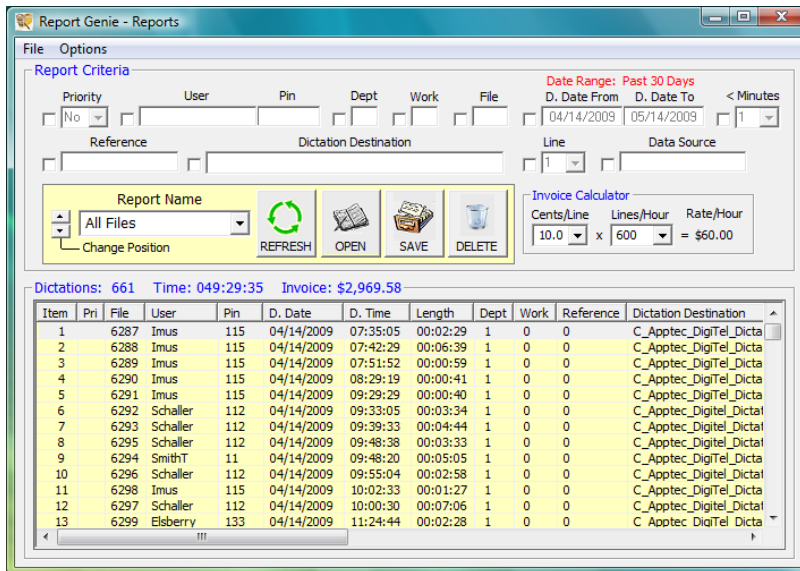
Two default Reports are available… **All Files** and **Priority Files**. Select either and then click **Refresh**.

You may also set the **Report Criteria** as desired to see only the dictations that meet the criteria you are interested in. Once you set the criteria, click **Refresh**. If you wish to save the new **Report Criteria** you defined, enter a name in the **Report Name** field and click **Save**.

The checkbox to the left of a parameter enables or disables that parameter.

Click **Open** to open the current dictation list in a word processor. You may also click the ☐ at the top right of the menu to see more of the dictation list by maximizing the display.

You may also sort the displayed list by a particular parameter by clicking the heading of a column. And you may resize a column's width by clicking and dragging its edge.

You may also change the sequence of the **Report Names** in the selection box by selecting one report name and then clicking the up or down arrow labeled **Change Position** to move it higher or lower in the selection box.

To aid in quickly defining a new **Report Criteria**, you may highlight a particular file in the dictation file list, and then click **Options - Paste highlighted file data into Report Criteria**.

The **D.Date From** and **D.Date To** fields allow you to further narrow the date range to list only desired dictation file data. Click **Options - Reset to**: to reset the **D.Date From and D.Date To** fields to the range chosen on the main menu.

The **Invoice Calculator** section lets you set an invoice rate (Cents/Line) and an average number of lines per hour (Lines/Hour) of dictation to calculate the (Rate/Hour) dollars per hour of dictation. The heading of the dictation list will show the total invoice for that report.

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TOOLBOX

The **General Settings** menu in the Toolbox lets you set the following features.
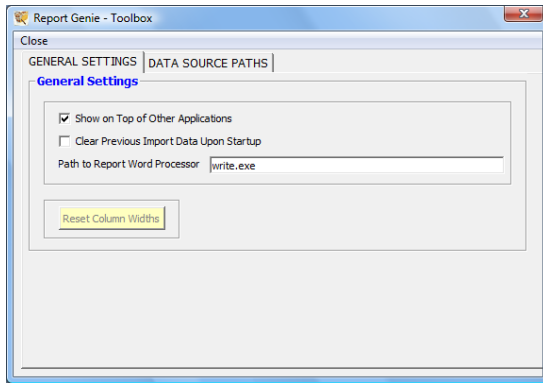
Show on Top of Other Application will keep ReportGenie showing on top of other applications.

Clear Previous Import Data Upon Startup will clear the previously imported data when ReportGenie starts up.

The default **Path to Report Word Processor** is write.exe. The word processor defined here will be the word processor that the dictation list is opened in when **Open** is clicked in the **Reports** menu.

Click **Reset Column Widths** to reset the Report menu's dictation list's column widths to their default sizes. This key is disabled until after the first dictation list is displayed.

The **Data Source Paths** menu in the Toolbox lets you set the paths to one or more DigiTel Log Books' folders.
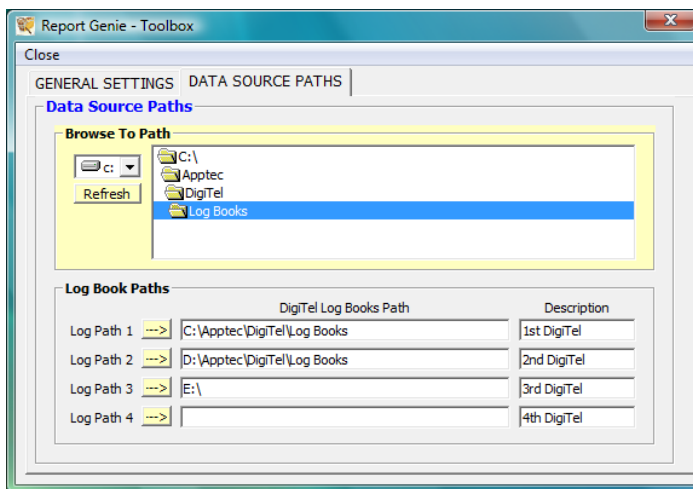
You may **Browse To path** to locate the desired DigiTel Log Books' folder, and then click the → key to set that path into the desired **Log Path** field.

The 2nd, 3rd, and 4th Log Paths are optional. Set them only if you want this ReportGenie to be able to look at data from more than one DigiTel System.

The Log Path Description field's default names may be changed as desired. These names will show in the main menu's Data Source selection box.

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USAGE EXAMPLES

ReportGenie is powerful, yet easy to use. And its ability to let you define and save as many reports as you need, makes it a snap to use.

ReportGenie lets you find data about specific dictations quickly, and provides invoicing estimates for individual as well as for groups of dictations.

Usage examples:
1. List all work within a specific time rage. For example, just show yesterdays work, or the past week's work, etc.
2. List all work dictated by a particular user, or by a group of users, or for a particular transcriptionist or pool of transcriptionists, or for a particular client.
   You can group users using their Department Number, the Work type Number they've entered, or the Dictation Destination. The Department Number can be used to identify different departments within one user's office, or can be used to identify different clients, or both. The Work type Number can be used to identify different types of work (letters, reports, etc., or H&P's, ER Reports, etc.). The Dictation Destination can be used to identify the specific transcriptionist the work went to, or the pool of transcriptionists the work was available to.
3. List just Priority work.
4. List work defined by any combination of the available criteria, including locating a specific dictation if you know its File Number.
5. View the touch-tones the user entered during each dictation session. This information can be useful to help see why a particular user may be having trouble using the system. Sometimes a new user may not remember what keys on the phone control which functions in DigiTel.
6. View the line number that a dictation was called in on. This information can be useful to help find a phone line that may have static or some other issue that the phone company needs to look into.
7. View the total number of dictations that were called into a particular line. This information can help determine if you need to add capacity (more phone lines or another DigiTel System) so that the users have a lower chance of getting a busy signal when calling the system.
8. View the total Invoice amount. This information can be used for client or cross-department billing purposes. It can also be used as a cross check for the billing you receive by your transcriptionists, and to see which clients are your heaviest users.
9. You can also create reports that show you data, individually or combined, from up to four different DigiTel Systems. This capability lets you create reports on up to a virtual 16 port DigiTel system, by letting you access the data from individual DigiTel systems that are installed on pc's that are connected to your network.

With the flexibility of combining the report criteria as you desire, you can define reports that meet your needs today and in the future*!*
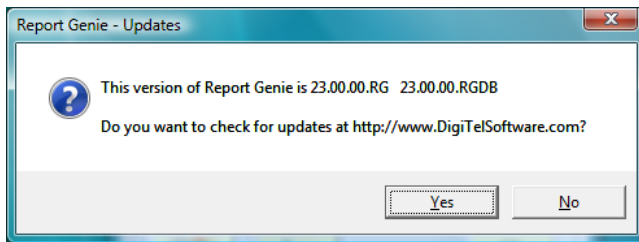
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UPDATES and LICENSE AGREEMENT

Updates:
Software and Documentation updates are available at http://www.DigiTelSoftware.com

If ReportGenie is not already installed, check this site to see if a newer "Full Software Package" version is available.

If ReportGenie is already installed, you may click **File** then **Check for Updates** to automatically navigate to this site.

When you are on http://www.DigiTelSoftware.com, click SOFTWARE and then scroll down to the "Software Upgrade" section and click on the new version of ReportGenie. Then follow the on-screen instructions.

On this site, you can also sign-up for Update Notices to receive an email when a new update becomes available.

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