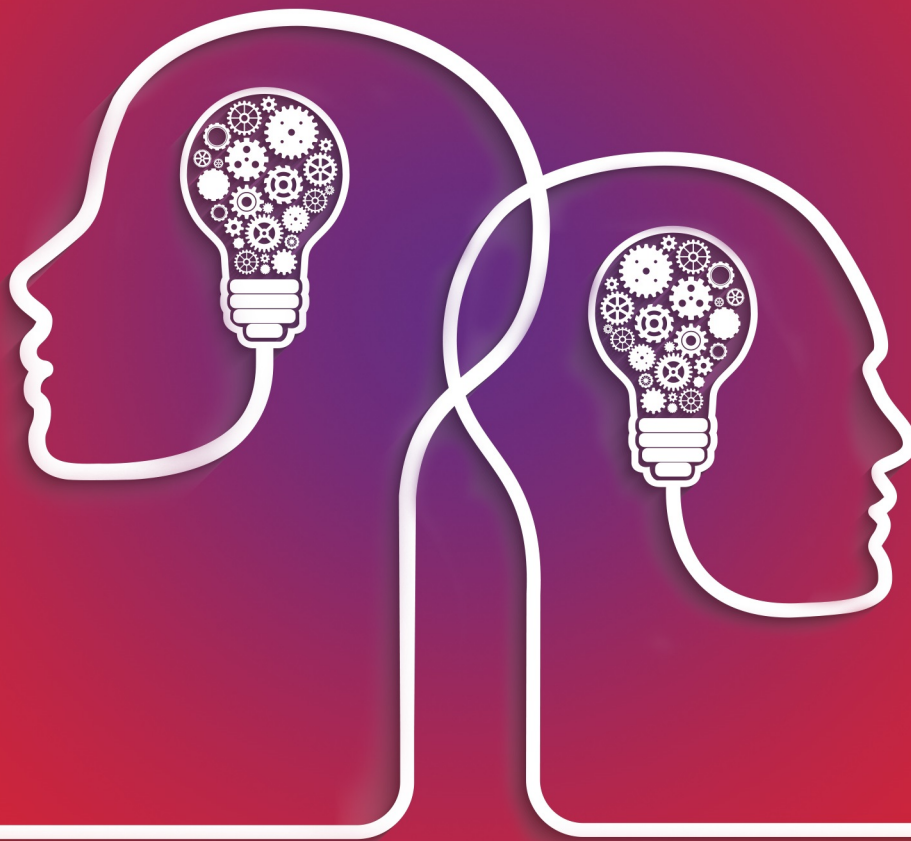
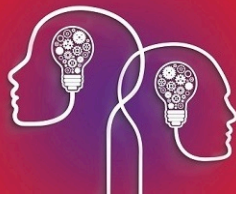


Bp VIP.net

Report Creation Guide



VIP.net knowledge base 



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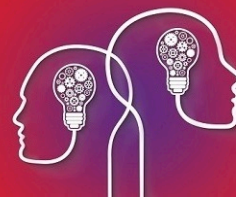
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Last updated: August 2017

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Create a report in Report Builder

Users will need the **Report Builder** access permission set to 'Enabled' to create reports in Report Builder.

Building a report involves the following steps:

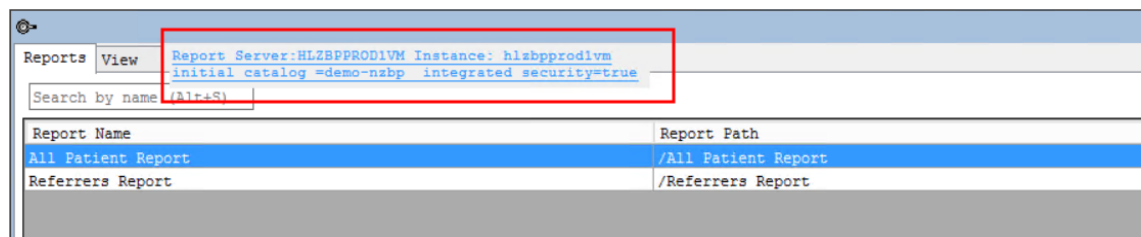
1. Select a data source (usually the Houston report model).
2. Select the fields to go in the report.
3. Apply conditional filters to the report.
4. Arrange how the fields will be displayed in the report.
5. Finalise the style of the report.

***Note:** The following instructions describe how to create a basic report. For more information on using SQL Server Report Builder to create more sophisticated reports., consult the user documentation for your version of SQL Server or click **Help** from any Report Builder screen.*

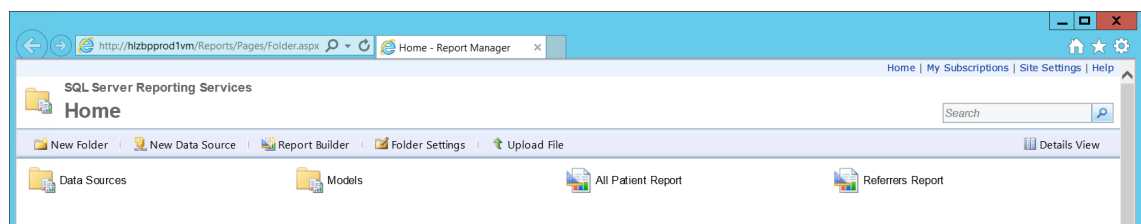
Create a new report

The following example describes how to create a report showing the full name and date of birth for all patients at your practice over 90 years of age.

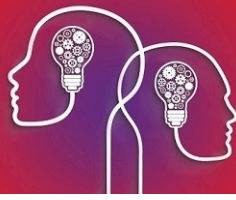
1. From Bp VIP.net, select **Reports > Report Builder**. The **Manage Reports** screen will open, showing any custom reports already created.
2. Click the **Report Server** link in blue at the top of the screen.



3. The computer's default Internet browser will open at SQL Server Report Manager Home.

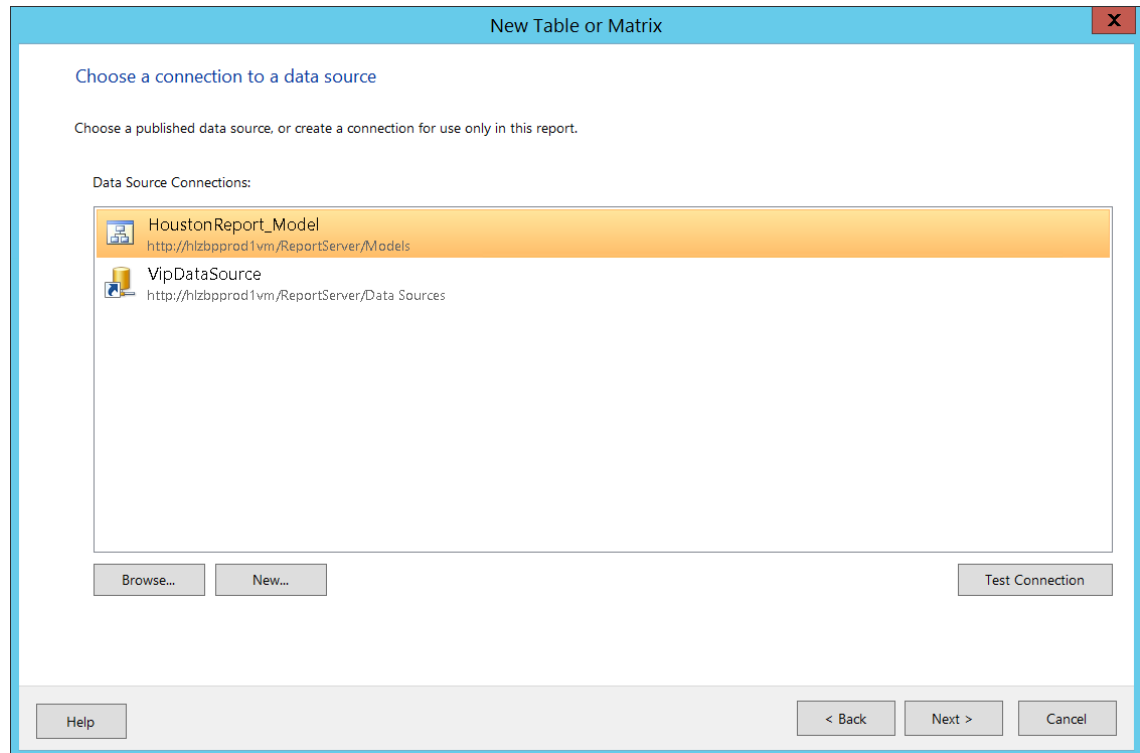


4. Click **Report Builder** from the toolbar. Report Builder will open at the **Getting Started** screen.

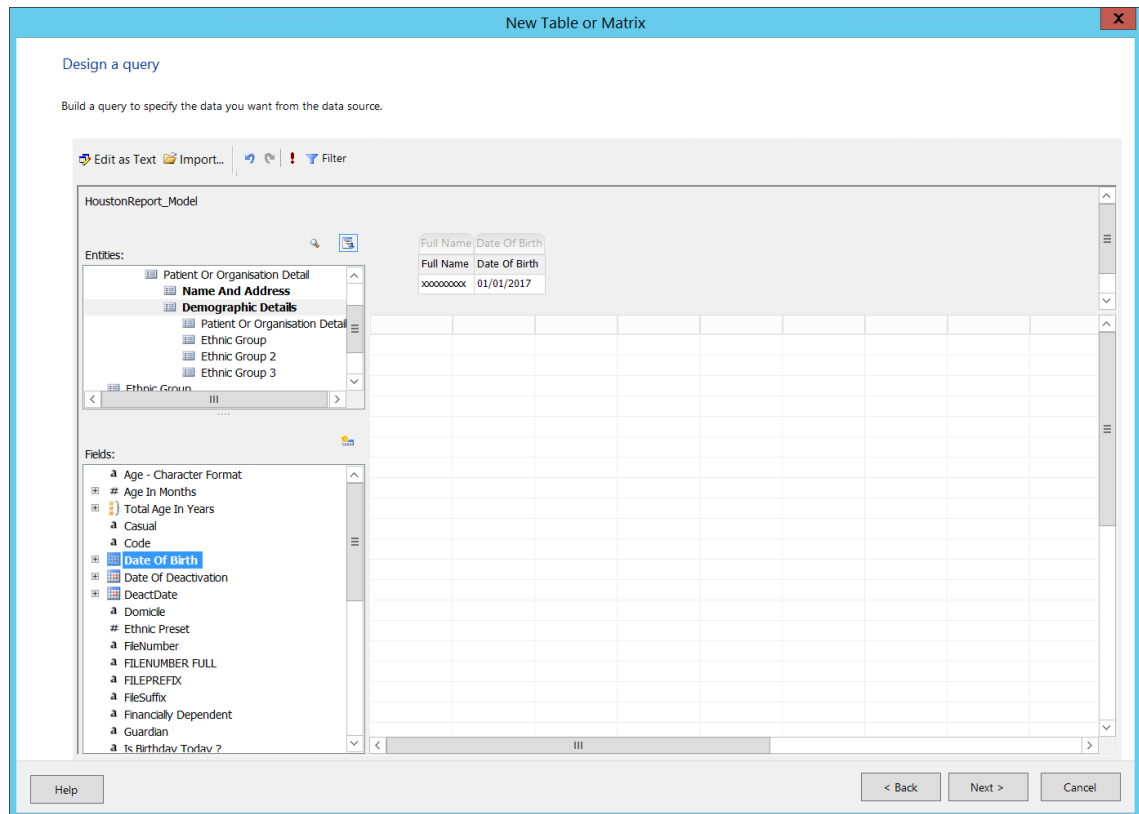
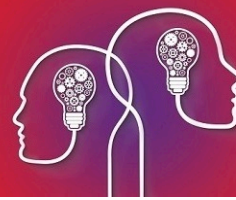


Select data source

5. Click **Table or Matrix Wizard**. The **New Table or Matrix** screen will appear.
6. Select the option **Create a dataset** at the bottom and click **Next**.



7. If the model **Connection HoustonReport_Model** is not available in the **Data Source Connections** list, click **Browse...** and select **Models > HoustonReport_Model** to add the model.
8. Select **HoustonReport_Model** and click **Next**. The **Design a query** screen will open. This screen contains:
 - Toolbar along the top
 - A list of database **Entities** to select from.
 - A list of **Fields** in a selected entity than can be included in the report.
 - A row of selected fields beneath the toolbar.



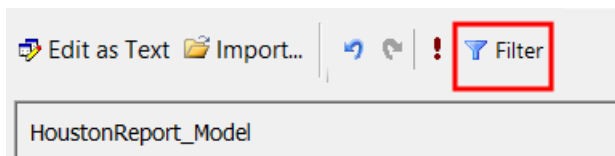
Select database fields

In the example above, the **Full Name** and **Date of Birth** database fields have already been added.

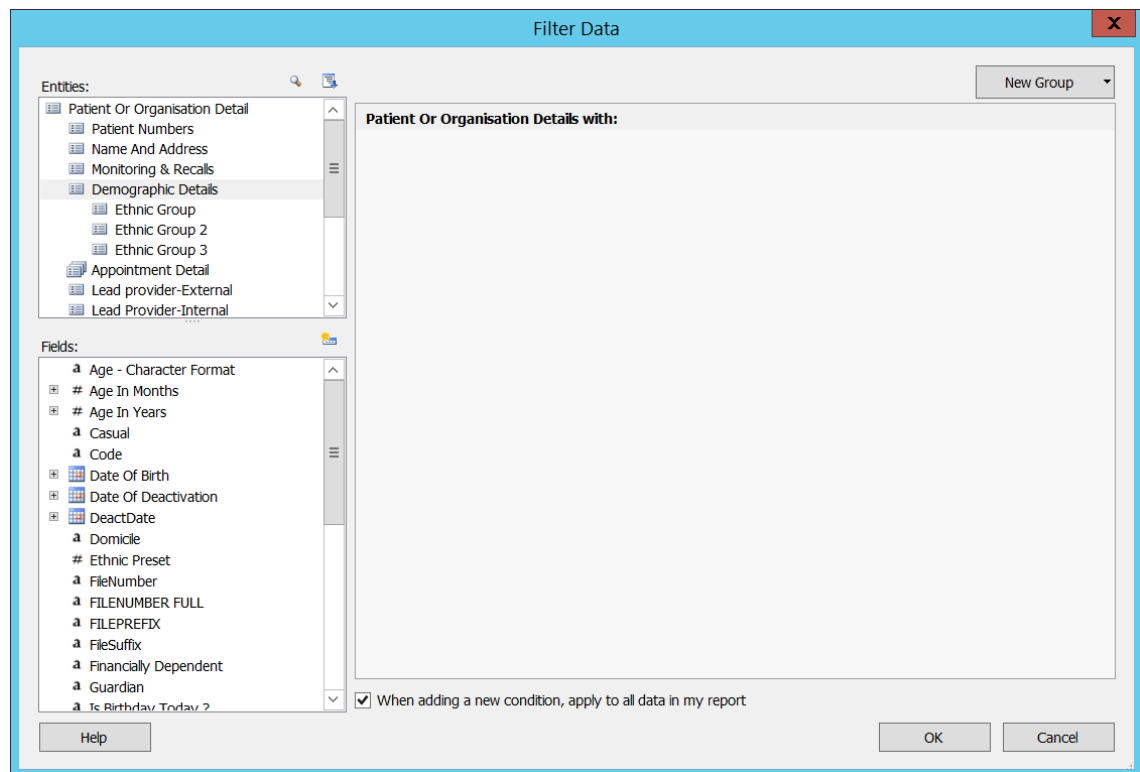
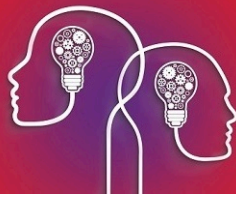
9. In the **Entities** list, select **Patient or Organisation Detail > Name and Address**.
10. In the **Fields** list, scroll down and double-click **Full Name**. The field will be added to the row of selected fields.
11. In the **Entities** list, select **Patient or Organisation Detail > Demographic Details**.
12. In the **Fields** list, double-click **Date of Birth**. The field will be added to the row of selected fields.

Apply filters

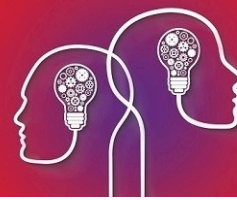
13. Click the **Filter** icon in the toolbar.



14. The **Filter Data** screen appears.



15. In the **Entities** list, select **Patient or Organisation Detail > Demographic Details**.
16. In the **Fields** list, scroll down and double-click **Age in Years**. The field will be added to the list of filters on the right hand side.



Filter Data

Entities:

- Patient Or Organisation Detail
 - Patient Numbers
 - Name And Address
 - Monitoring & Recalls
 - Demographic Details**
 - Ethnic Group
 - Ethnic Group 2
 - Ethnic Group 3
 - Appointment Detail
 - Lead provider-External
 - Lead Provider-Internal

Fields:

- Age - Character Format
- # Age In Months
- # **Age In Years**
- Casual
- Code
- Date Of Birth
- Date Of Deactivation
- DeactDate

Patient Or Organisation Details with:

Age In Years equals (unspecified)

17. Enter '90' in the text field of the filter.

18. Click the filter condition ('equals' by default) and click **Greater than** from the list.

Filter Data

Entities:

- Patient Or Organisation Detail
 - Patient Numbers
 - Name And Address
 - Monitoring & Recalls
 - Demographic Details**
 - Ethnic Group
 - Ethnic Group 2
 - Ethnic Group 3
 - Appointment Detail
 - Lead provider-External
 - Lead Provider-Internal

Fields:

- Age - Character Format
- # Age In Months
- # **Age In Years**

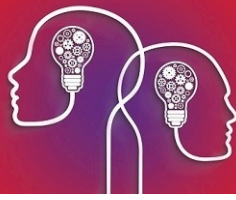
Patient Or Organisation Details with:

Age In Years greater than 90

- Not
- Is Empty
- Equals
- In a List
- Greater Than
- Greater Than or Equals
- Less Than
- Less Than or Equals
- From...To

19. Click **OK** to save the filter.

20. In the **Design a query** screen, click **Next**. The **Arrange fields** screen will appear.



New Table or Matrix X

Arrange fields

Arrange fields to group data in rows, columns, or both, and choose values to display. Data expands across the page in column groups and down the page in row groups. Use functions such as Sum, Avg, and Count on the fields in the Values box.

Available fields

- Full_Name
- Date_Of_Birth

Column groups

Row groups

Σ Values

- Full_Name
- Date_Of_Birth

Help < Back Next > Cancel

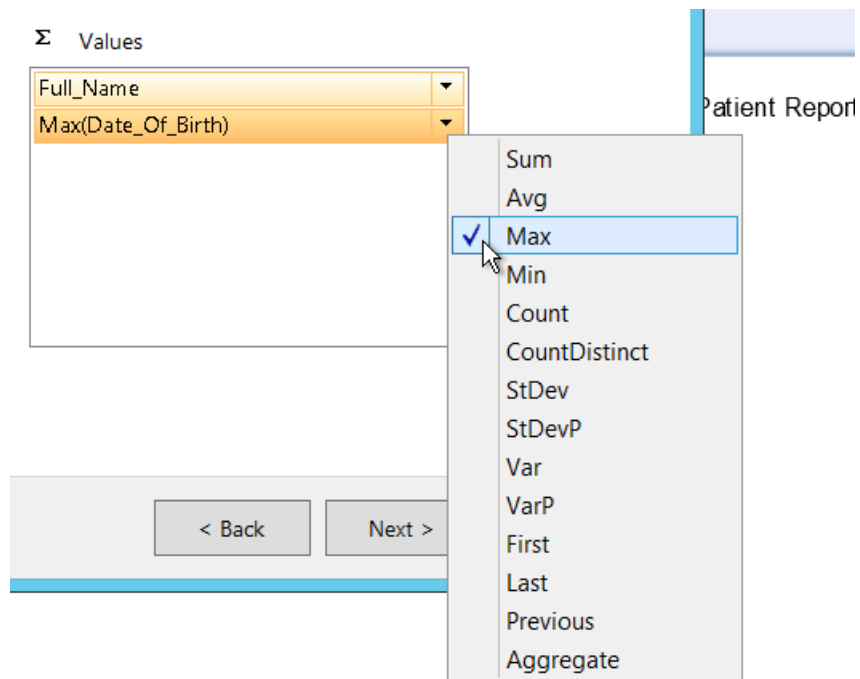
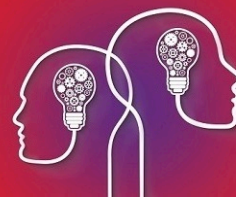
Arrange fields

21. Click and drag fields from the **Available fields** list to the other boxes in this screen to structure your report:
 - Row groups — Combine fields into an expandable row
 - Column groups — Combine fields into an expandable column
 - Σ Values — Apply an operation to a field, such as summing all field values into a total, showing the most recent or highest value of a field, or counting the number of occurrences.
22. In the example screen above, the **Full_Name** and **Date_of_Birth** fields have been dragged to the **Σ Values** list.



Important: For your selected fields to appear in the report, you must click and drag all fields from the **Available fields** list to the **Σ Values** list, even if you are not applying totalling operators to any fields.

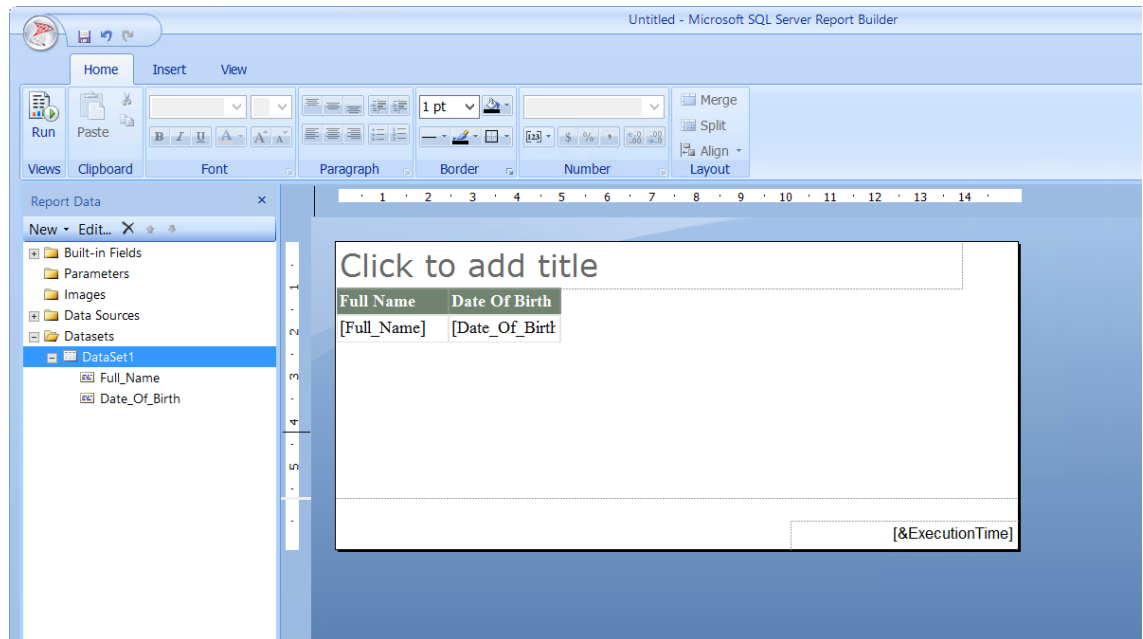
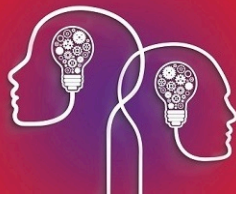
23. To apply an operation to a field, click the down arrow to the right and select an operation from the list. In the example below, the Max operator is being applied to the **Date of Birth** field, which will show the highest or most recent date of birth.



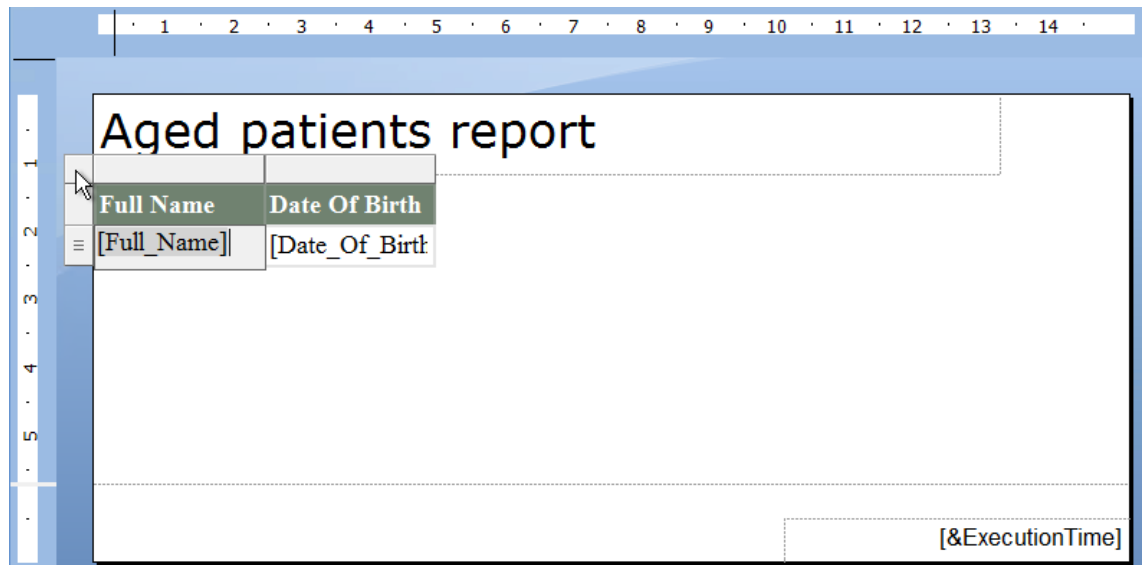
24. For a complete description of all of the operators available, consult the documentation for your version of SQL Server or click **Help** from this screen.
25. Click **Next**. The **Choose the layout** screen appears.

Style the report

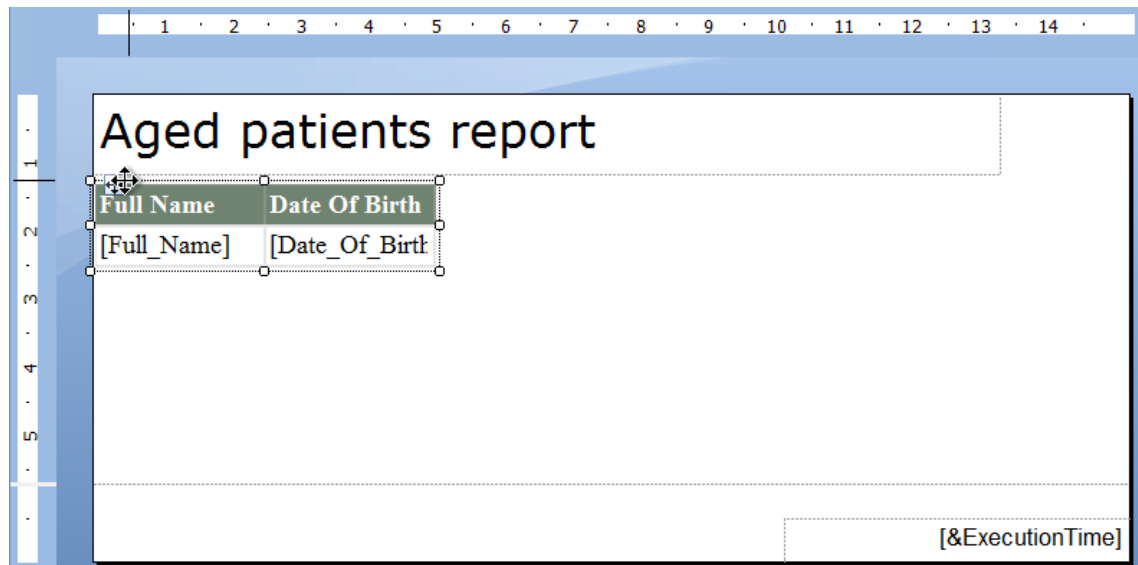
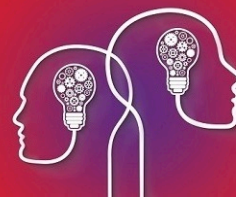
26. If your report has totals or subtotals, you can choose where to place total rows in relation to regular rows, and whether row and column groups are expanded by default.
27. Click **Next**. The **Choose a style** screen appears. Choose a theme for the report and click **Finish>>** to return to Report Builder.



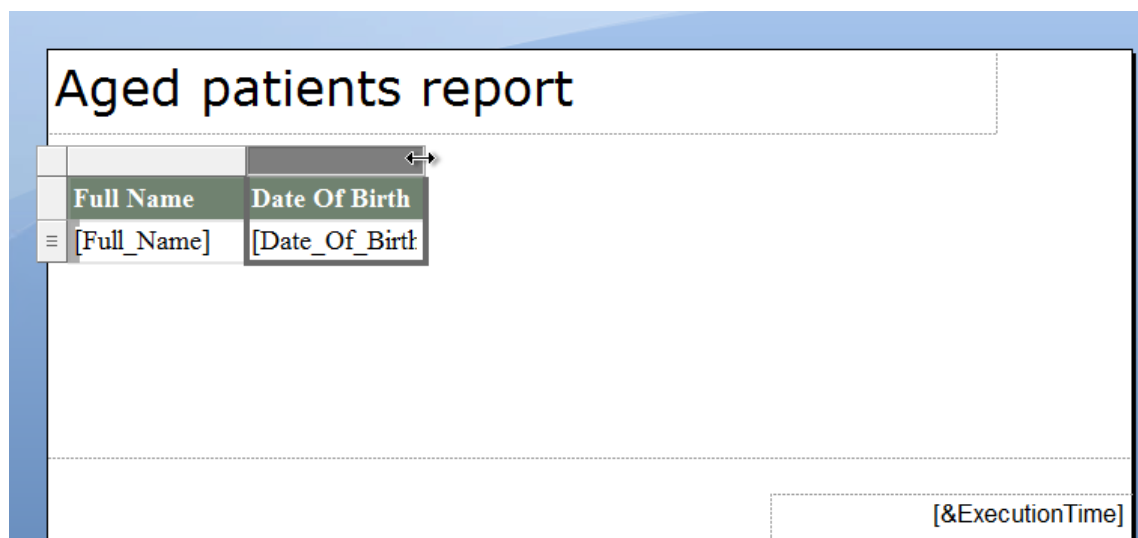
28. Click in the text 'Click to add title' and enter a meaningful title for the report.
29. To move the table of fields, click anywhere in the table to bring up the table headers.



30. Click the tile in the right corner of the table to change it to the click and drag icon. Click the icon and drag to move the table.




31. To change the width of a column, click and drag on the sides of the header tiles.



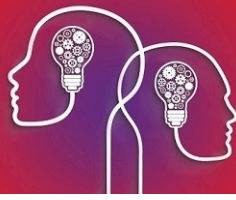
32. To run the report, click **Run** at the left end of the toolbar. Report Builder will process and display the report.

33. Click **Design** to return to design mode and continue editing the report.

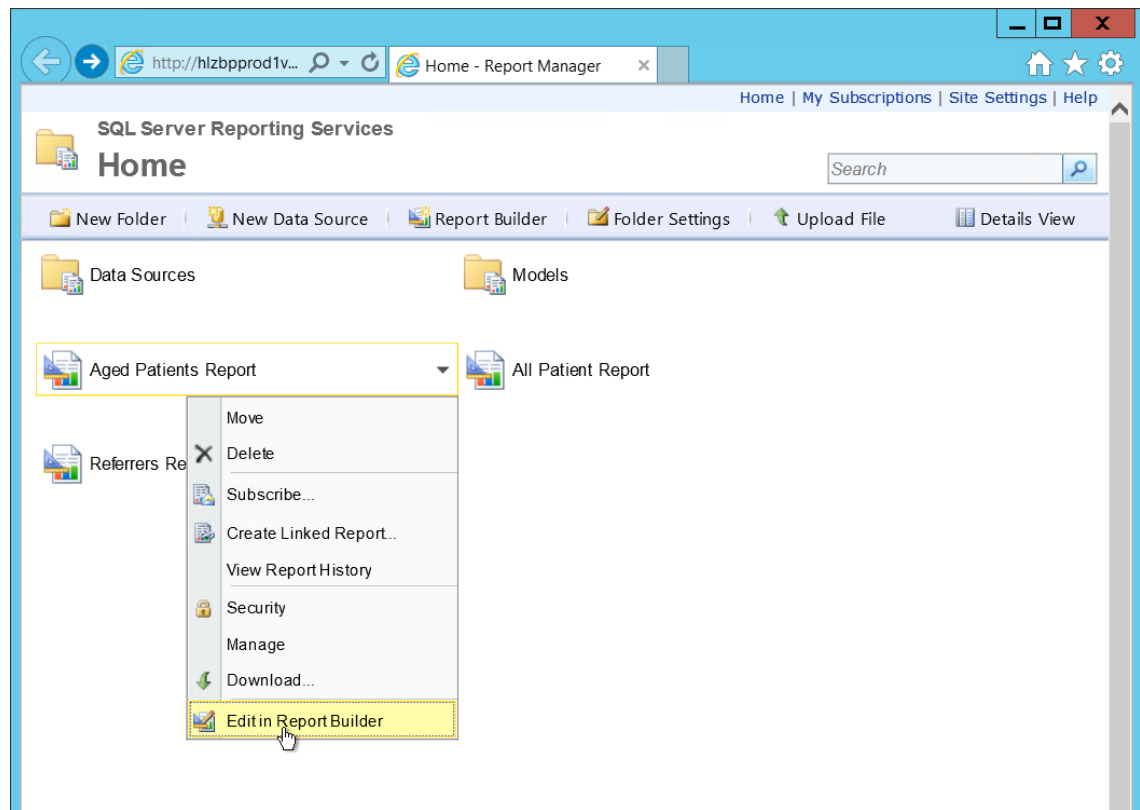
34. Click the **Save** icon  in the top left of Report Builder to save the report. Report Builder will prompt for path and filename.

Modify an existing report

1. From Bp VIP.net, select **Reports > Report Builder > Report Server** link. The SQL Server Report Manager Home page will open.
2. If you recently created a report but it does not appear in the home page, refresh the page in your browser.



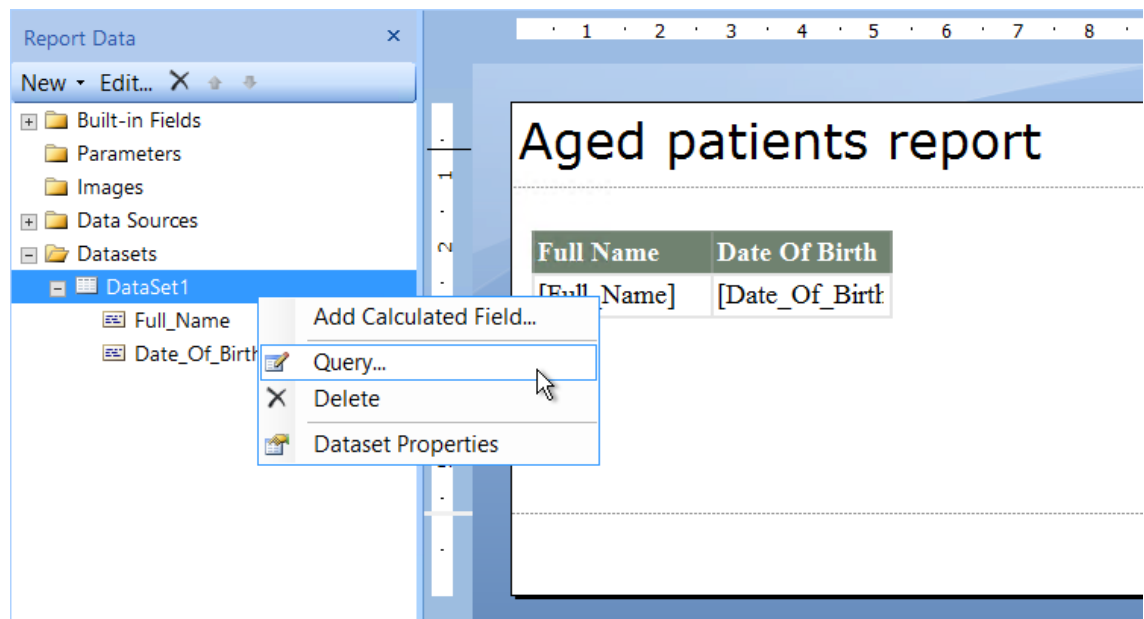
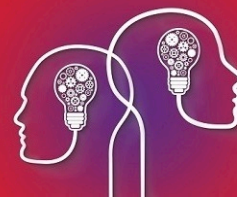
3. Hover the mouse over a report name to show a down arrow. Click the arrow to see a list of options.



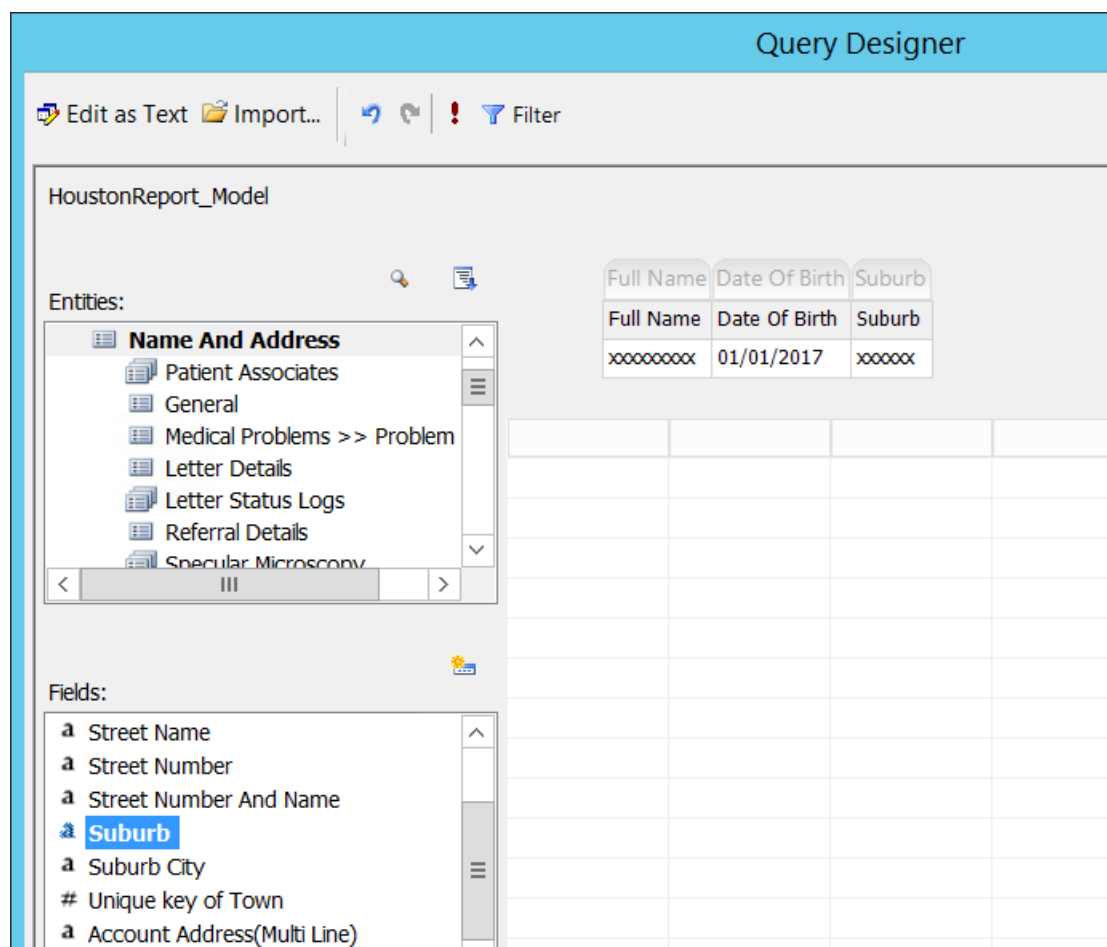
4. Select **Edit in Report Builder**. The report will open in Report Builder in Design mode.

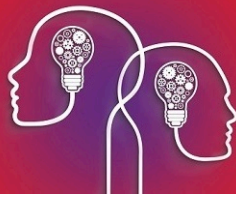
Add columns to an existing report

1. Open the report in Report Builder.
2. Open the **Datasets** folder on the left hand side, and open the folder underneath. The fields you added in the new report wizard will be listed.
3. Right-click the dataset and select **Query**.



4. The Query Designer will appear. Add a field as described in [Select database fields on page 5](#). In the example below, the field **Suburb** has been added from **Patient or Organisation Detail > Name and Address**.

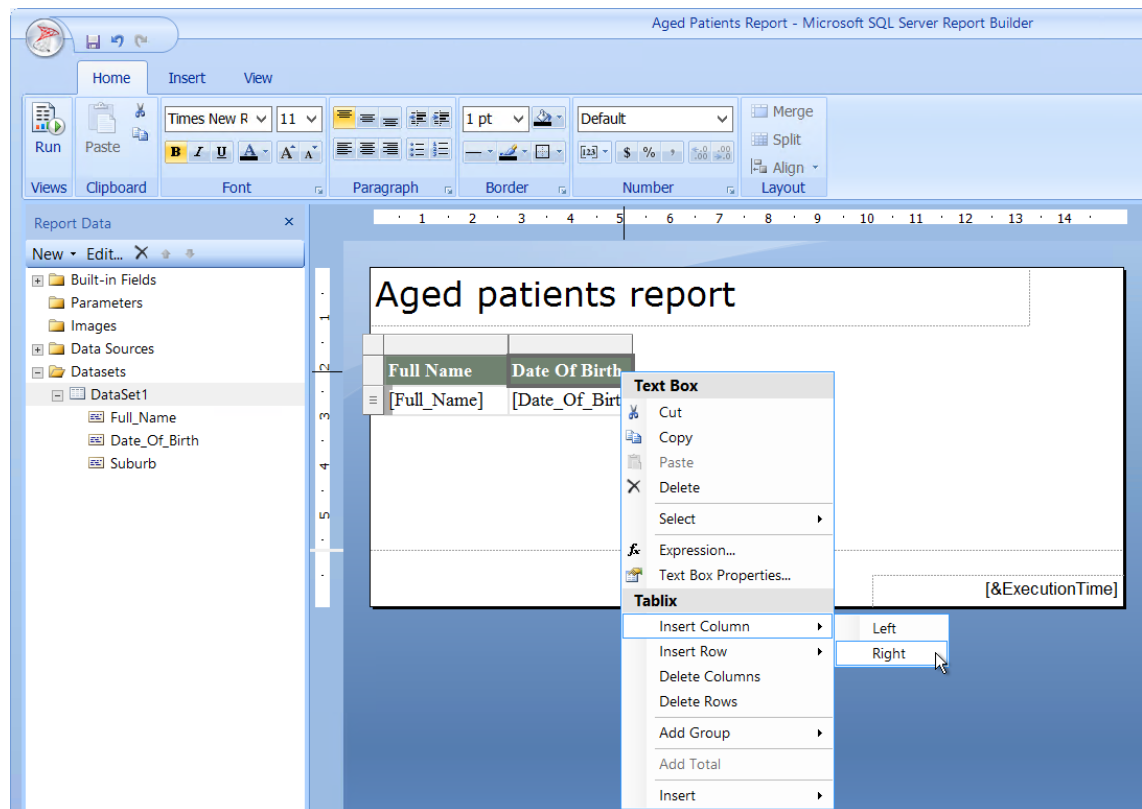




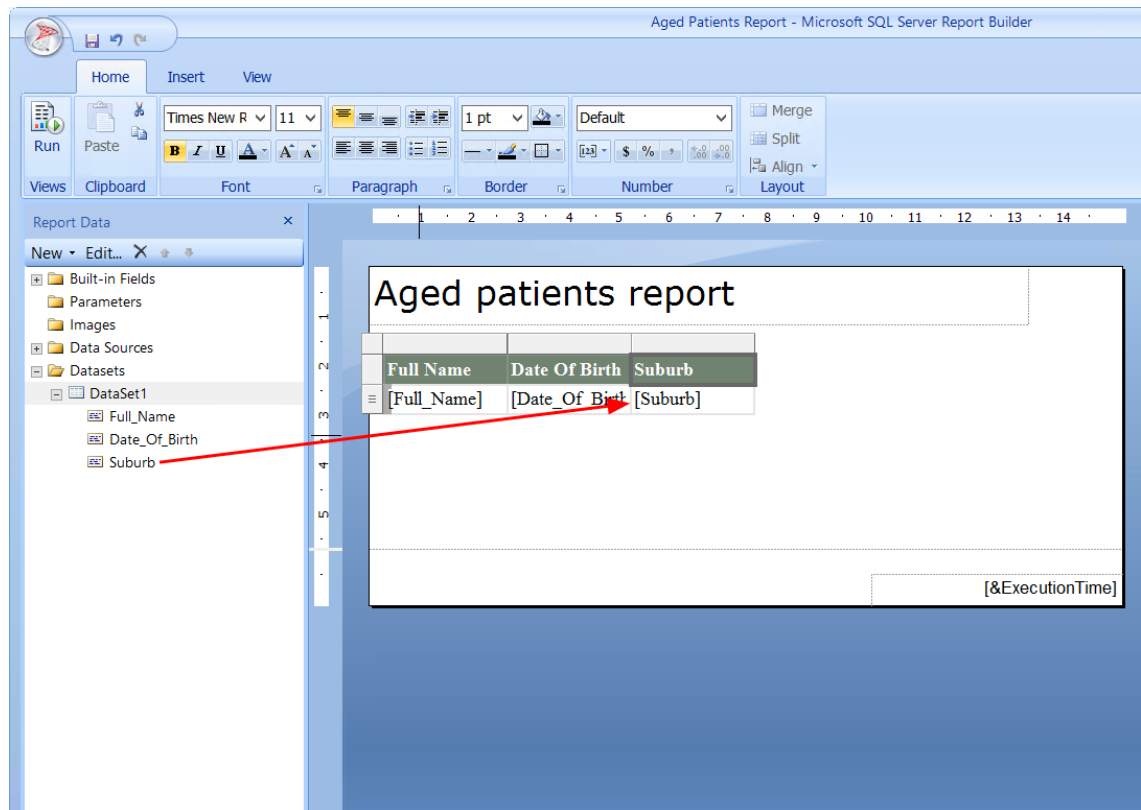
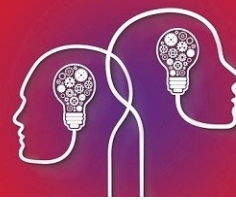
5. Add as many fields as the report requires. Click **OK** to return to the Report Builder.

The fields have been added to the dataset, but not yet added to the report.

6. Right-click a column in the report and select to **Insert Column** to the left or right. You can insert a new column anywhere in the table of fields.



7. Drag the new field from the Dataset list to the empty column you just created. The field will populate the column.

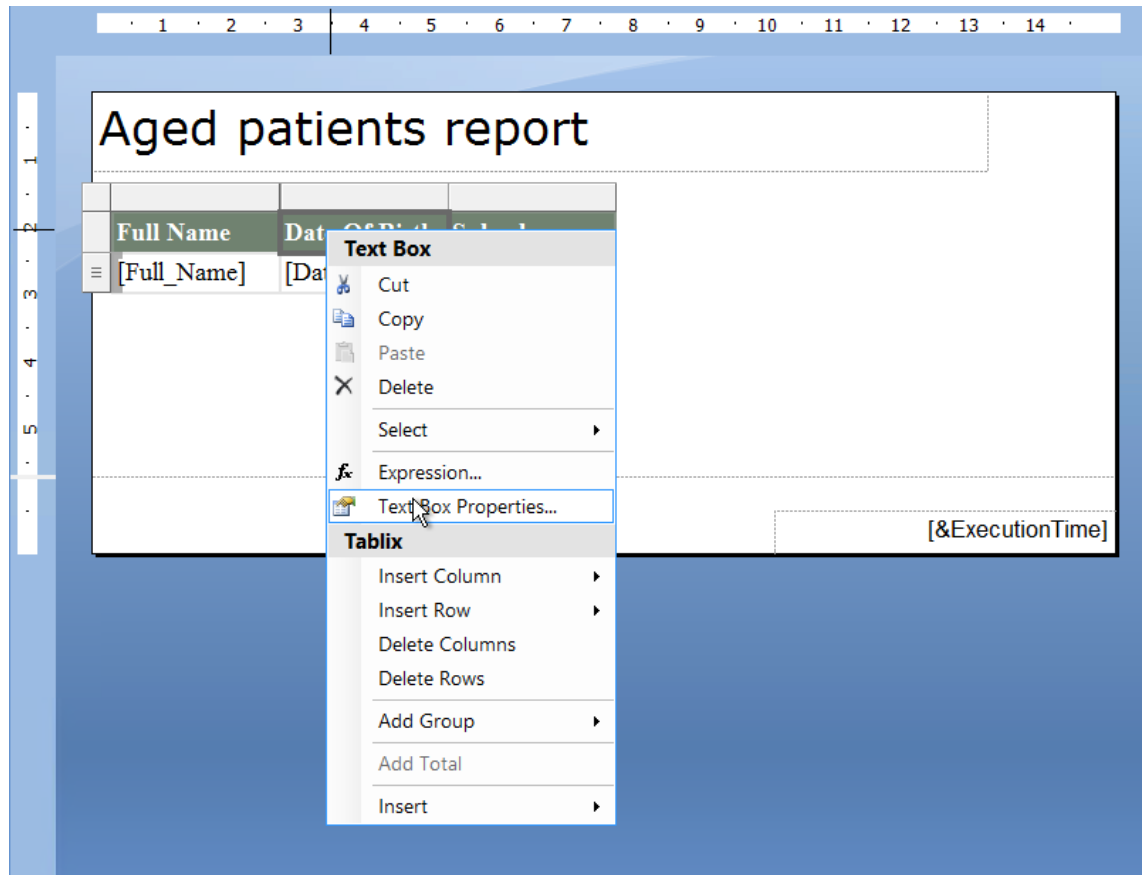
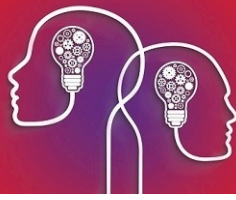


8. Repeat for all new fields.
9. Click the save icon in the top left to save the modified report.

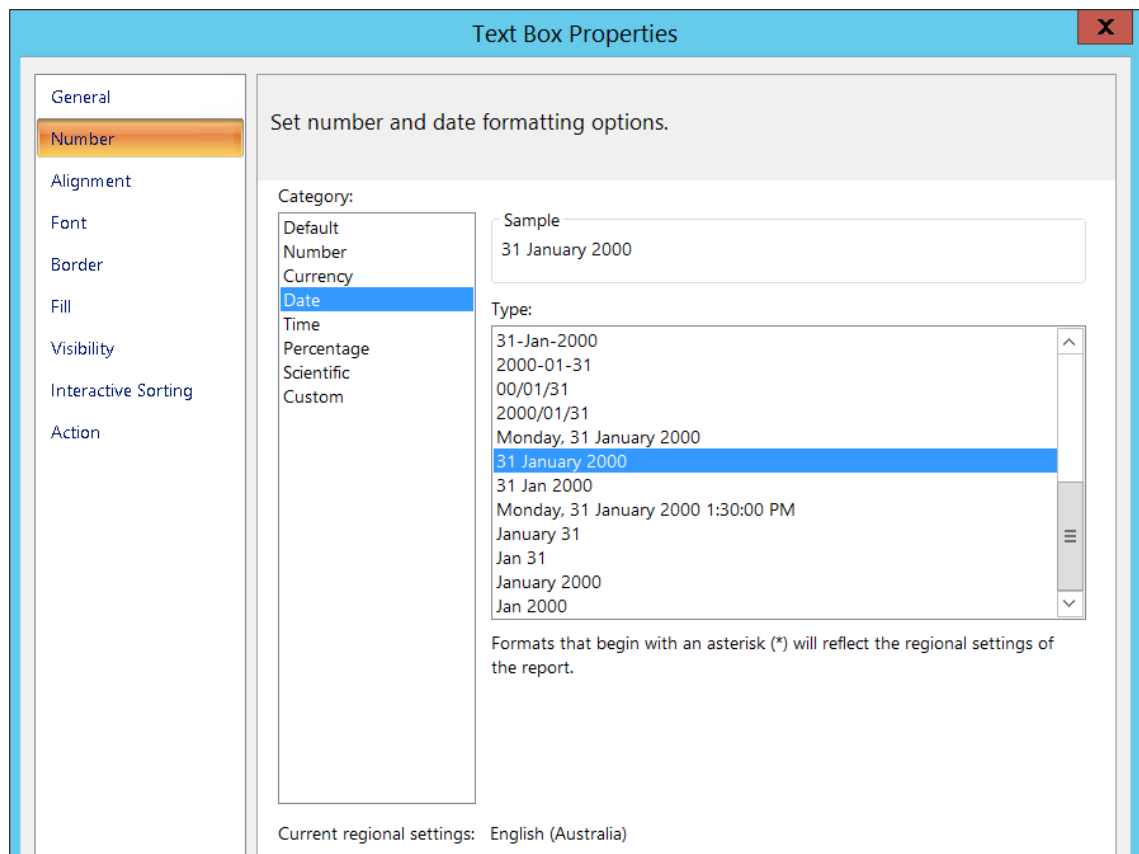
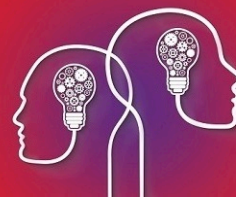
Format fields

You may want to change the appearance or formatting of a field. For example, to convert from an American date format to an Australian format, or to impose two decimal places for dollar amounts.

1. Open the report in Report Builder.
2. Right-click the column you want to modify and select **Text Box Properties**.



3. The **Text Box Properties** screen will appear.



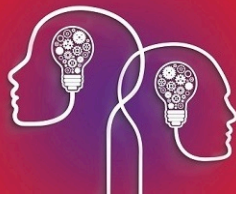
In this example, we are applying a date format in the style '31 January 2000' to the patient's birthday field.

4. To modify the decimal settings for a dollar value, select 'Currency' from the **Category** list and set currency formatting such as the number of decimal places and regional dollar symbol.
5. Click **OK** to save the formatting.

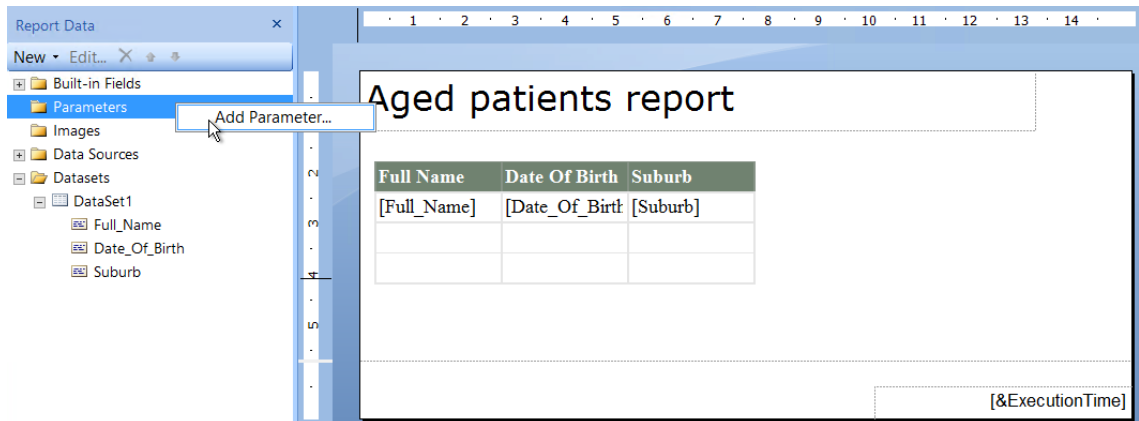
Add report parameters

Parameters act in a similar manner to filters (they change the data that is displayed in the final report), but are applied after all the report data has been retrieved. Parameters can be specified at runtime by the user from the report viewer.

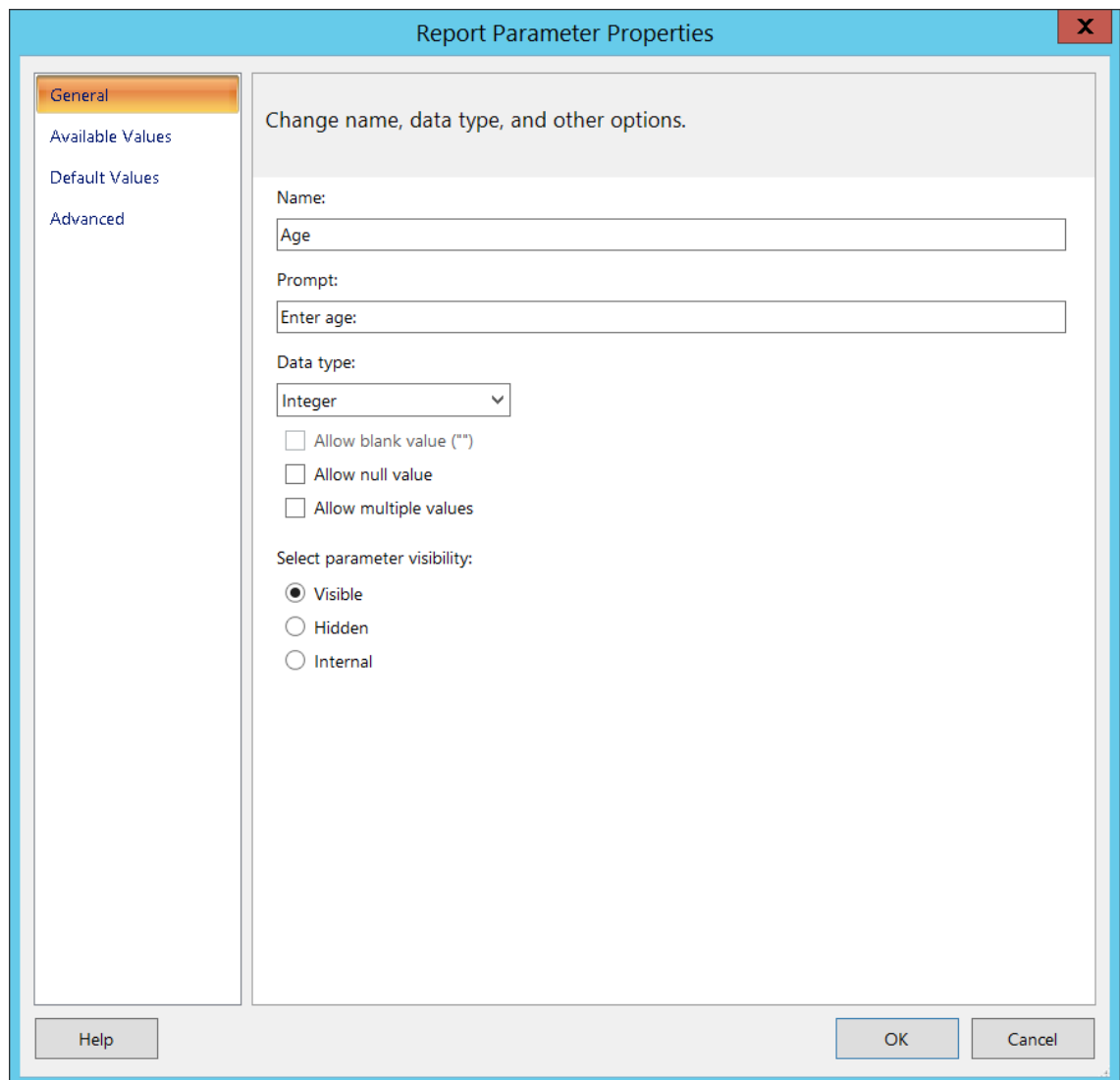
For example, you may wish to add a parameter 'Age' so that a user can enter the age to filter the report by, instead of being hardcoded to 90 years or older.

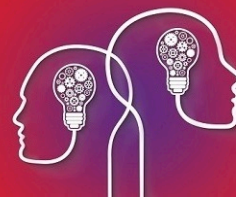


1. From the Report Builder screen, right-click **Parameters** and click **Add Parameter**.



2. The **Report Parameter Properties** screen will appear.



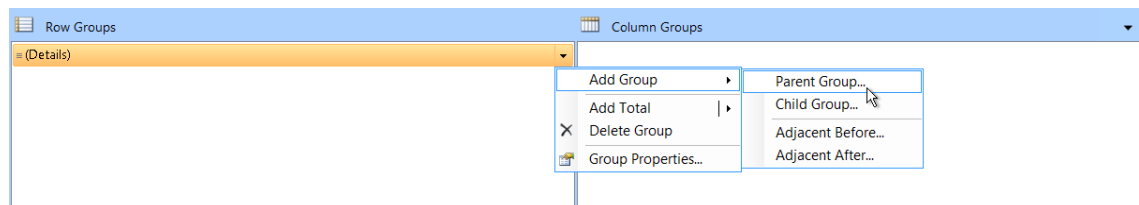


3. Enter a descriptive **Name** and **Prompt**. The **Prompt** field is displayed in the report viewer, where the user enters or selects a value to filter the report.
4. Select the **Data type** of the parameter. The data type will depend on the field you are filtering on. For example, it makes no sense to compare a parameter of type 'Date/Time' to the Age in Years field, which is an integer.
5. Set the **parameter visibility**. Refer to the Report Builder user documentation for more information on how this field affects your report.
6. Specify the **Available Values** and **Default Values** for the parameter by selecting the tab on the left. For example, you can restrict the user to selecting a value between '50' and '100' years of age, and set the default value to '90'.
7. Click **OK** to save the parameter and return to the Report Builder screen. The parameter will be added to the **Parameters** list on the left hand side of the Report Builder.
8. To edit a parameter, right-click and select **Parameter Properties**.
9. You can now use the parameter value in other calculations in your report. For more information on including parameters in queries and report design, search the Report Builder Help documentation.

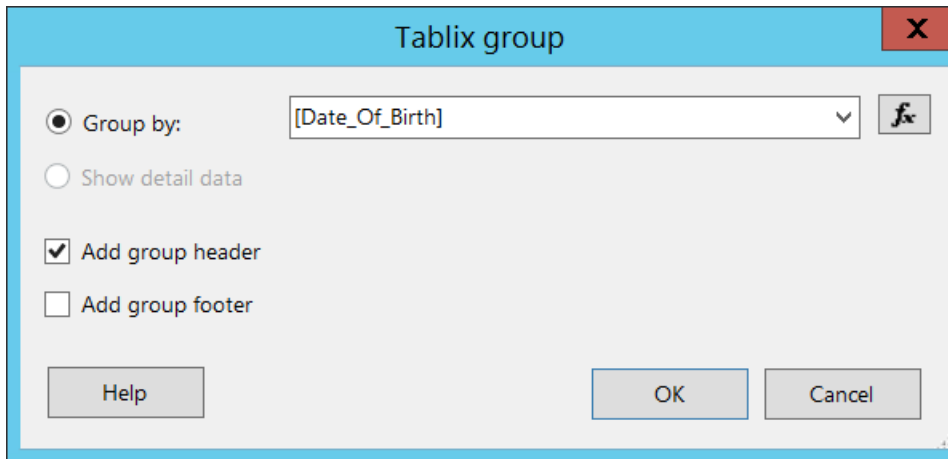
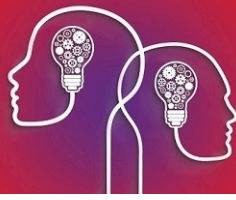
Apply Grouping to rows and columns

You can group rows and column to organise the data in your report and provide 'total' rows.

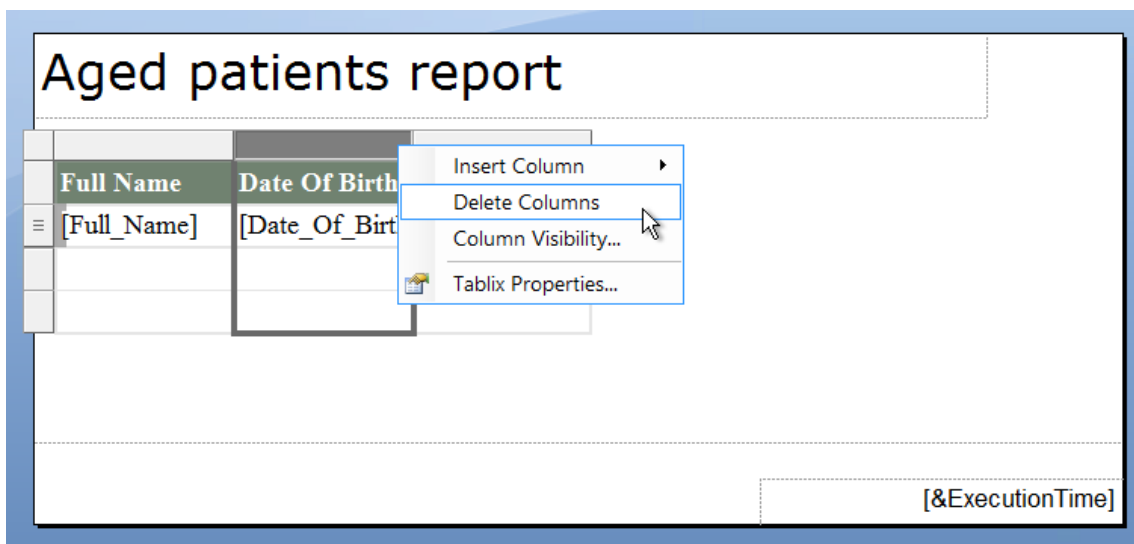
1. From the Report Builder screen, click the down arrow in the blank group field in **Row Groups** or **Column Groups** at the bottom of the screen. You can create grouping hierarchies of parents and children for complex reports.



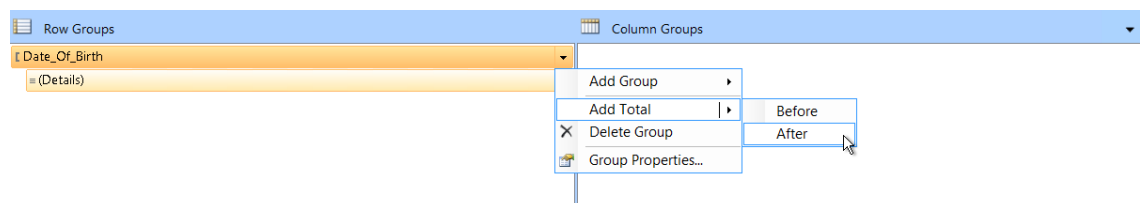
2. The **Tablix group** screen will appear. Select the row that you want to group, and add a group header to the report.



3. If you want to delete the original row that is now grouped, right-click on the column header in the report design space and select **Delete Columns**.



4. To add a total row, click the down arrow again and select **Add total** and place the total row before or after the grouped rows.



5. Save the changes and run the report to view how your report looks.