Reports

This chapter describes how to create, run, export, and (optionally) print reports. The following reports are available:

• Actions by Drug Schedule	• Dispense Info	• Lot Usage	• Replenishment Info
• Audit Cell*	• Drug Code Mapping*	• Low Cell	• Replenishments By Day
• Audit Drug*	• Drug Rx History	• Manual Fill Log	• Script Volume By Day
• Audit Operator	• Drug Setup	• Mapped Drug Scripts	• Scripts By Drug Code
• Audit Replenishments	• Inventory By Cell	• Non-Calibrated Cells	• Vial Utilization
• Cell Last Emptied	• Inventory By Drug Code	• Operator Actions	
• Cell Settings	• Locking Cell Activity	• Prescription Details	
• Cleared Shelf			

*Available only on the unit's *Inventory side*.

You can create, run and print reports from either side of the Max.

List of reports

To help you monitor script volume, manage cell inventory, review drug Rx history and track other usage data, the Max includes a feature for creating the following reports:

Report	Description
Actions by Drug Schedule	Lists all manual fills, replenishments, return-to- stocks, and total number of scripts filled by drug schedule category.
Audit Cell*	Displays any changes to cell parameters by an operator.
Audit Drug*	Displays any changes to drug parameters by an operator.

Report	Description
Audit Operator	Displays a comprehensive list of all actions performed by a specified operator during a defined interval. These actions include cell replenishments, return-to-stocks, adding cells, adding new drugs, deleting cells and modifying cell/drug values.
Audit Replenishments	Lists replenishments with the ID of the operator who processed them and the *Pharmacist-level* (or authorized) operator who approved them.
Cell Last Emptied	Lists all drugs in the machine, displaying the date the cell was designated empty and how many days have passed since that date.
Cell Settings	Lists all active cells, their current calibration status and their dispensing parameters (baffle, nozzle and pressure).
Cleared Shelf	Lists Rx orders for a specified date range that were marked as Shelf Cleared. Orders are assigned this status when a prescription drop-off shelf is manually cleared.
Dispense Info	Lists Rx orders filled by the Max during a specified date range.
Drug Code Mapping*	Lists all drugs with at least one drug code mapping. This list can be filtered to display mappings for a given drug code or cell.
Drug Rx History	Displays all drug dispensing activity during a designated date range, including those drugs for which no scripts were dispensed.
Drug Setup	Displays all cells that were set up with a drug during a designated date range.
Inventory By Cell	Displays the inventory for each cell in the Max.
Inventory By Drug Code	Displays the Max's inventory by drug code.
Locking Cell Activity	Lists all replenishments, return-to-stocks and Inventory edits completed on locking cells during the specified date range.
Lot Usage	Lists all Rx orders and the lot number used to fill each order for a given drug code. If a lot number is specified, this report lists only those orders filled with the specified drug code and lot number.
Low Cell	Lists all cells with inventory lower than the drug's low inventory threshold.
Manual Fill Log	Lists all manual fills that were marked "complete" during the date range specified. It includes all scripts that were picked up, scanned out, deleted, returned to stock, etc. The Operator column records the name of the operator performing the manual fill. The report does not display patient names.

Report	Description
Mapped Drug Scripts	A list of the scripts that contain mapped drugs.
Non-Calibrated Cells	Lists all active cells for which a calibration fill has not yet been successfully completed.
Operator Actions	Lists all controlled system functions accessed during a specified period. The report can be filtered by operator and/or action.
Prescription Details	Displays all details for a specific Rx order. Details include the states the order passed through in the unit, dispensing cell information, and prescription drop-off shelf location.
Replenishment Info	Lists all replenishments and return-to-stock procedures.
Replenishments By Day	On a bar graph, displays a replenishment count grouped by hour for a specified day.
Scripts By Drug Code	Displays a summary of the number of dispensed pills and scripts, grouped by drug code and a time period (day/month/year).
Script Volume By Day	On a bar graph, displays a count of Rx orders submitted to and picked up from the Max, grouped by hour for a specified day.
Script Volume By Drug Code	Displays a summary of the number of dispensed pills and scripts, grouped by drug code and a time period (day/month/year).
Vial Utilization	Displays the count for each vial dram size dispensed from the machine during a specified time range. These counts include only vials that have been scanned out or cleared from the shelves or the drop-off bin.

* Available only on the unit's *Inventory side.*

Basic steps

You create, run and print reports from the **General** tab of the System Functions window, available on both the *Prescription side* and *Inventory side*.

NOTE: The three reports Audit Cell, Audit Drug and Drug Code Mapping are available for selection, building and printing only on the unit's *Inventory side*. The remaining reports are available on both sides of the machine.
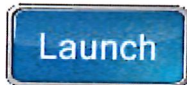
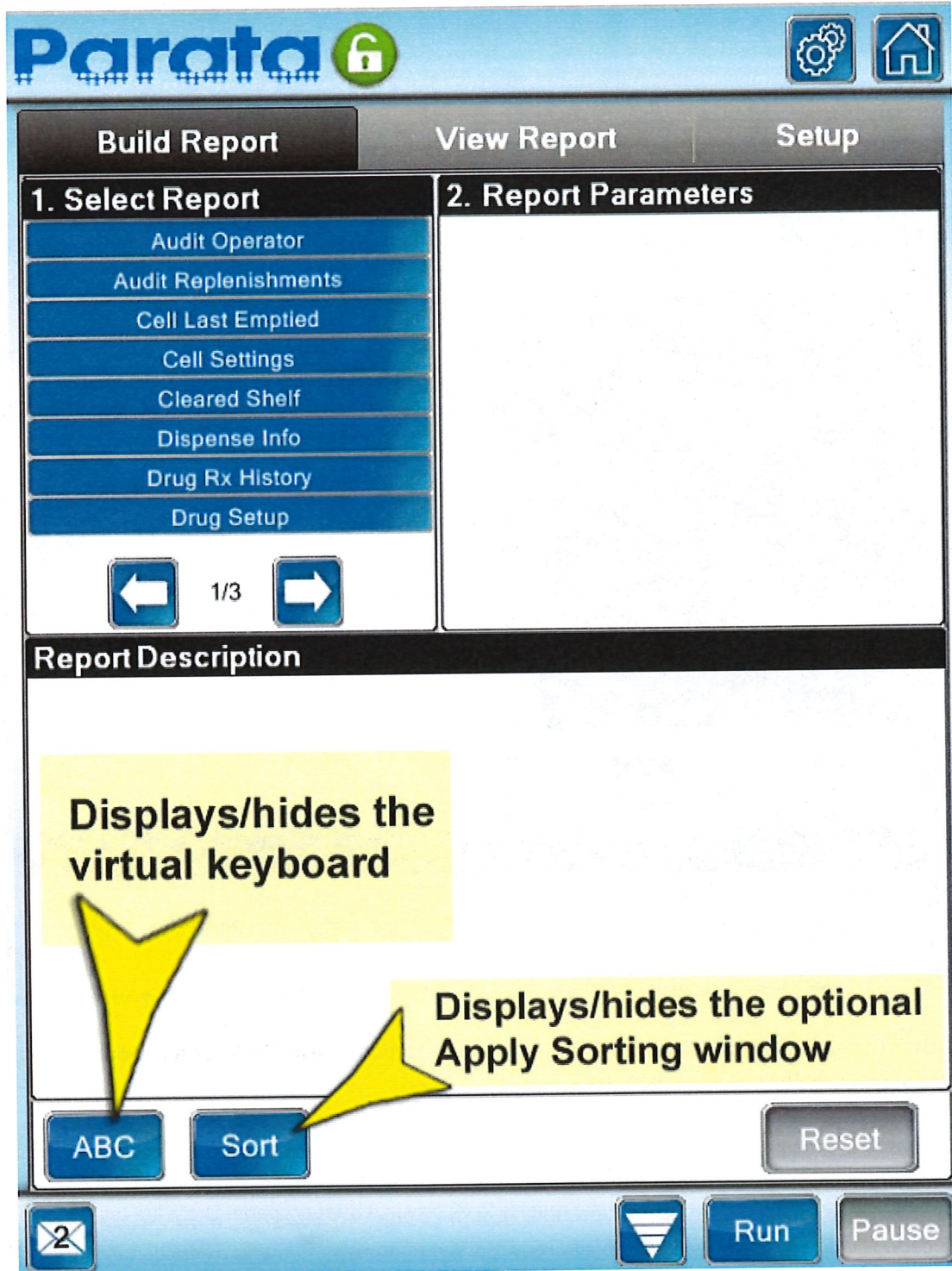Although the output of each report is different, the steps you follow to generate all reports are similar.

Printed documents are uncontrolled.

To launch reports

1. On either the *Prescription screen* or *Inventory screen*, touch the **System Functions** button.

2. Touch the Reports **Launch** button, located on the **General** tab.

The "Reports" window opens.

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Build Report | View Report | Setup

1. Select Report
- Audit Operator
- Audit Replenishments
- Cell Last Emptied
- Cell Settings
- Cleared Shelf
- Dispense Info
- Drug Rx History
- Drug Setup

◀ 1/3 ▶

2. Report Parameters

Report Description

Displays/hides the virtual keyboard

Displays/hides the optional Apply Sorting window
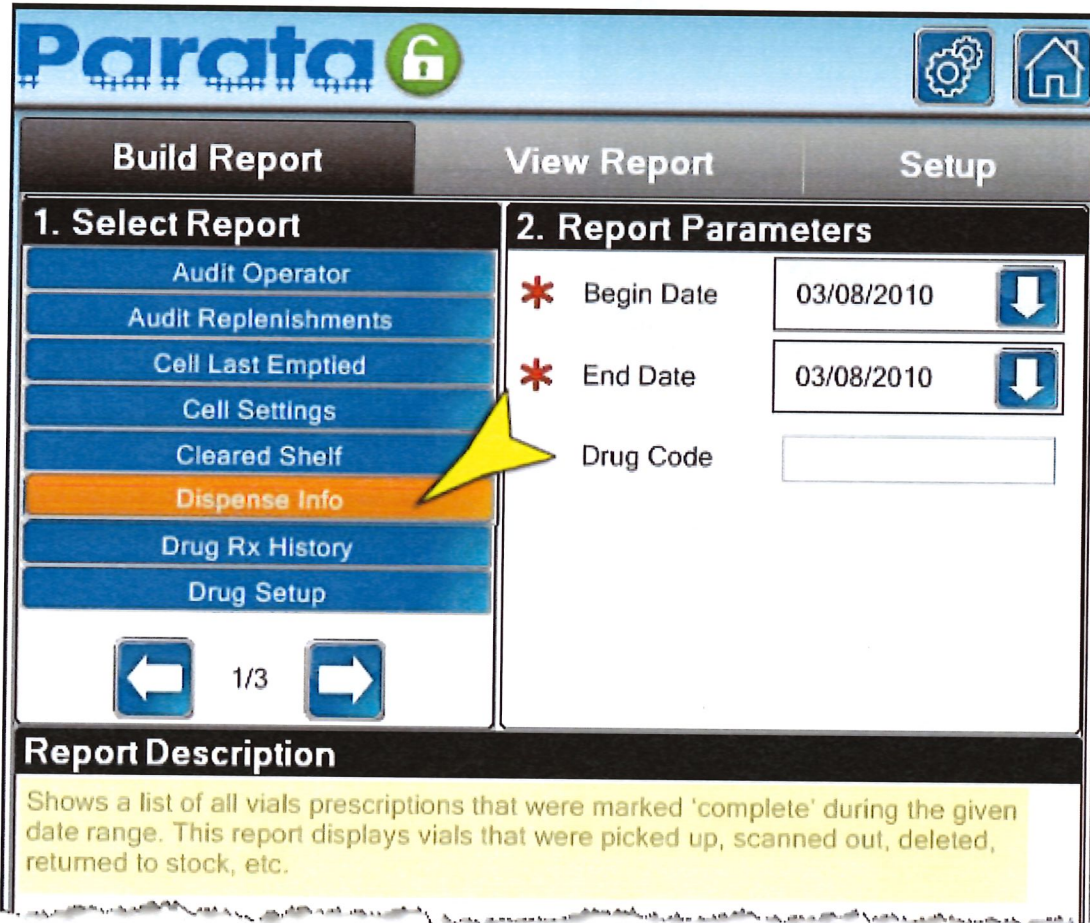
ABC | Sort | Reset

☒2 | ▼ | Run | Pause

You are ready to create a report.

Select Report

Touch one of the report types. If the report you want to run does not appear, touch the **Next** button to view more report types.

Figure 23: When you select a report, a description of the report is displayed.

NOTE: The Audit Cell, Audit Drug and Drug Code Mapping reports are available for selection, building and printing only on the unit's *Inventory side*.

Report Parameters

Some fields are required in order for the reports to display and print properly. There are two types of required fields: required, and conditionally required. A red asterisk ✳ marks a field that must be completed before the report can be generated. A yellow triangle ⚠ indicates that a field is conditionally required. That means that at least one of the conditionally required fields must be completed for the report to render properly.
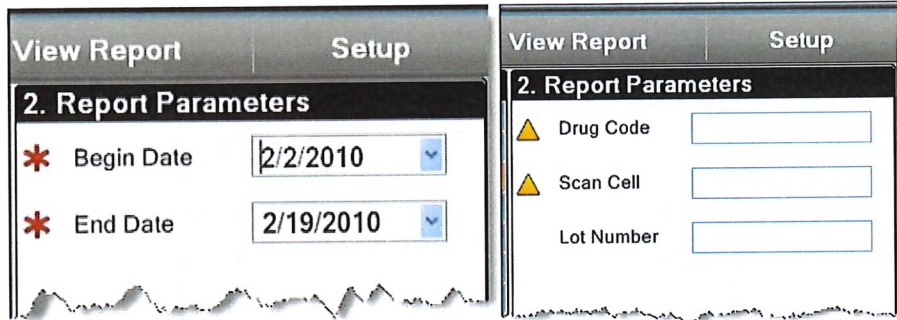
NOTE: Not all report types have required parameters.

In this example, you select a date range for the report. The Dispense Info report will display all the Rx orders filled by the Max during the time period you specify.

If you make a mistake in your selections and wish to start over, touch the **Reset** button, then reenter the desired criteria.

NOTE: Different reports employ different parameters. Some reports may ask you to select an option or to enter text (for example, an operator ID or Lot number). Others may ask you to scan a cell or stock bottle.

To select a date range for a report

1. Touch the down-arrow symbol in the **Begin Date** box to display the pop-up calendar.

View Report   **Setup**

2. Report Parameters

✱ Begin Date   03/08/2010 ⬇

March 2010

SU	M	TU	W	TH	F	SA
28	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

2. Select the Begin Date and End Date for your report.

3. Follow the same process to Select the End Date for your report.

2. Report Parameters

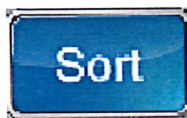|		
✱	Begin Date	2/2/2010
✱	End Date	2/19/2010
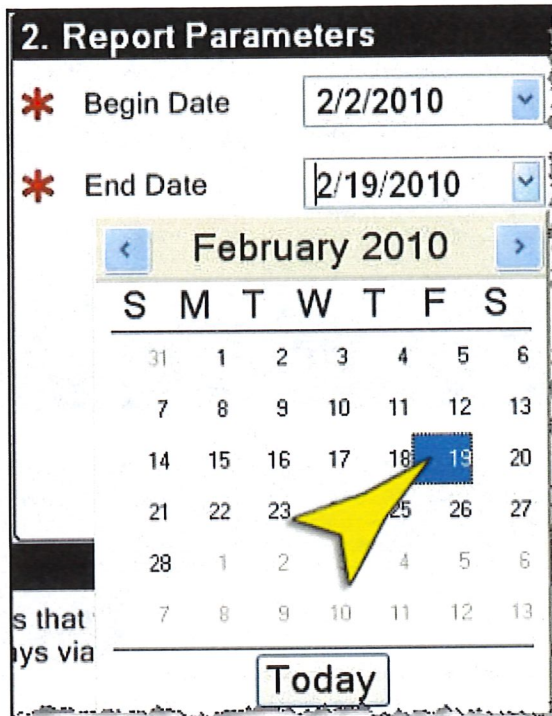
To apply sorting (optional)

Optionally, use the Apply Sorting window to sort (ascending or descending) the report output.
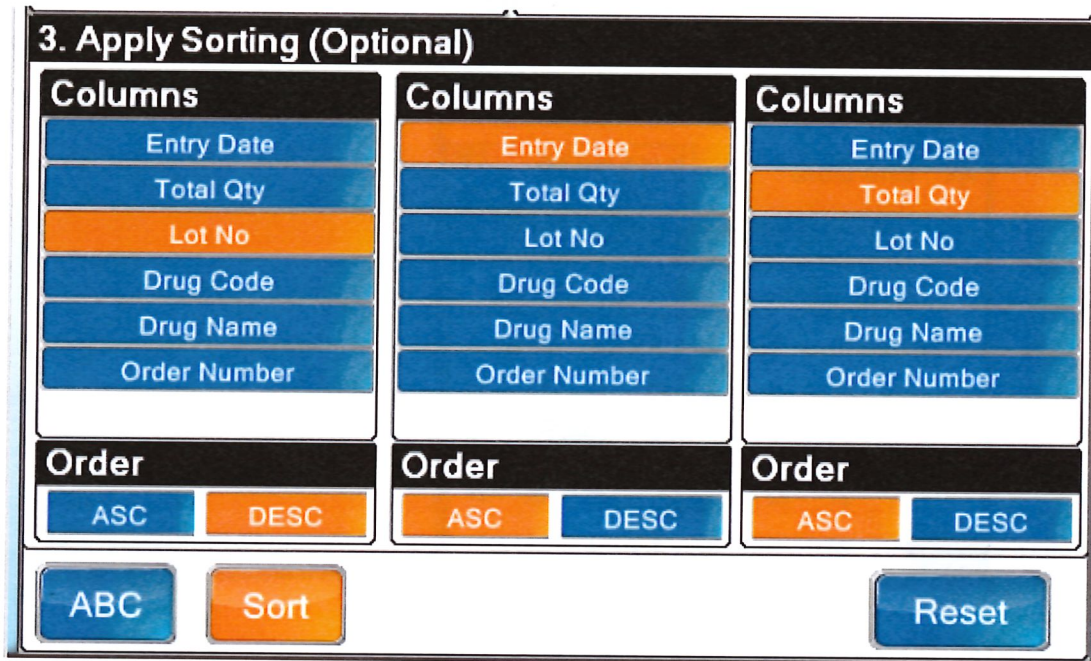
NOTE: Use the **Sort** button to display or hide the Apply Sorting option buttons.

1. Touch the **Sort** button to display the Apply Sorting window.

   Sort

2. Select one or more column headers.

   NOTE: You can select one column header in each of the Columns sections.

3. Apply Sorting (Optional)

Columns	Columns	Columns
Entry Date	Entry Date	Entry Date
Total Qty	Total Qty	Total Qty
Lot No	Lot No	Lot No
Drug Code	Drug Code	Drug Code
Drug Name	Drug Name	Drug Name
Order Number	Order Number	Order Number

Order	Order	Order
ASC DESC	ASC DESC	ASC DESC

ABC Sort Reset

The **Reset** button clears the settings on both the Report Parameters and Apply Sorting screens.
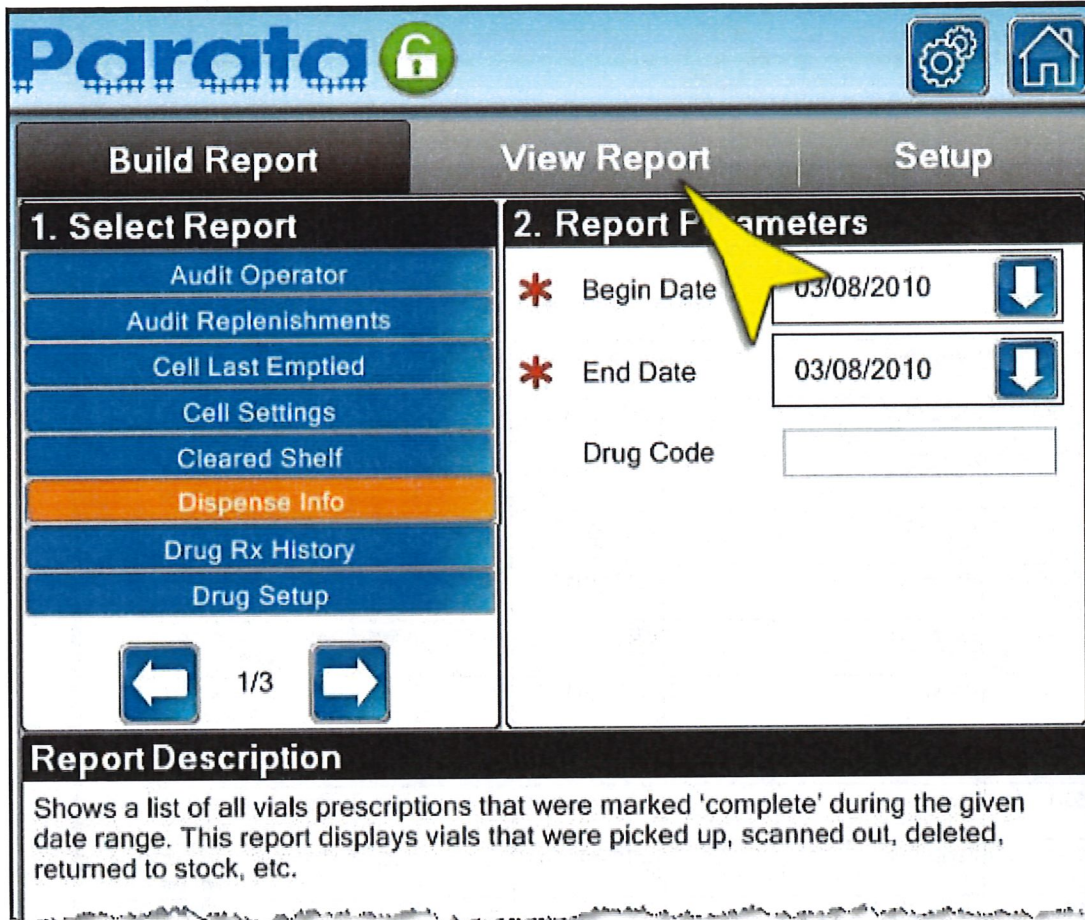
3. Select the sort order for each column header (the default is ascending).

 If you make a mistake in your selections and wish to start over, touch the **Reset** button and reenter the sorting criteria.

 After you have built your report, you can generate and view it.

Viewing the report

Touch the **View Report** tab to generate the report.

A progress indicator appears while the report is being generated:

Report is being generated

NOTE: Reports containing a lot of data take longer to generate and display.

Use the scroll bars to view hidden regions of the report.

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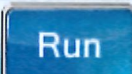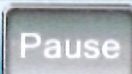
| Build Report | View Report | Setup |

Dispense Info Report

Tuesday, February 02, 2010 to Friday, February 19, 2010

Order Number	Drug Name	Drug Code	Lot No.	Vial Qty	Script Qty	Entry Date	C
1270-1	Parata 1m	63653-0117-11	ryr	20	20	3/10/2009 2:15:01 PM	7
1287-1	Parata 1m	63653-0117-11	ryr	30	30	3/10/2009 2:15:07 PM	8
M00003371-1	Parata 1m	63653-0117-11	jgev	60	60	4/16/2009 10:08:07 AM	1:
M00003403-1	Parata 1m	63653-0117-11	jgev	60	60	4/16/2009 10:10:52 AM	1
M00003404-1	Parata 1m	63653-0117-11	jgev	60	60	4/16/2009 10:11:29 AM	1
M00003420-1	Parata 1m	63653-0117-11	jgev	30	30	4/29/2009 2:10:33 PM	2
123456-1	Parata 1m	63653-0117-11	jgev	30	30	4/29/2009 2:12:19 PM	2
123459-1	Parata 1m	63653-0117-11	jgev	30	30	4/29/2009 2:12:19 PM	2
123461-1	Parata 1m	63653-0117-11	jgev	30	30	4/29/2009 2:12:20 PM	3
M01203501-1	Parata 1m	63653-0117-11	jgev	10	10	5/4/2009 4:53:40 PM	5
1235-1	Parata 1m	63653-0117-11	frhy	20	20	3/10/2009 2:14:46 PM	8
1259-1	Parata 1m	63653-0117-11	frhy	60	60	3/10/2009 2:14:57 PM	2
1243-1	Acetaminophen	00069-0731-66	37966	20	20	3/10/2009 2:14:47 PM	8
1246-1	Acetaminophen	00069-0731-66	37966	30	30	3/10/2009 2:14:52 PM	9
1250-1	Acetaminophen	00069-0731-66	37966	30	30	3/10/2009 2:14:53 PM	8

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Paused   **Run**   Pause

- Use the **Zoom Out** button to make the entire report viewable on the screen.

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- Use the **Zoom In** button to enlarge the report.

If you would like to run the report again with different parameters or sorting criteria, touch the **Build Report** tab, select new parameters, then touch the **View Report** tab to rerun the report.

"Sensitive information" header/footer

Reports can display a "sensitive information" message in their header and footer; see the text in the highlighted rectangles in the example:

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Build Report	View Report	Setup

Audit Replenish Report

** This report may contain SENSITIVE data **

Wednesday, July 23, 2014 to Wednesday, July 23, 2014

de	Drug Name	Orig Qty	Add Qty	New Qty	Type	Lot No	Lot Exp Date	Use By Date	Loc	
078-21	Cyclobenzaprine Hcl 5 mg Tablet	0	100	100	REPL	546	1/1/2018	1/1/2018	2L	
079-32	Cyclobenzaprine Hcl 10 mg Tablet	0	100	100	REPL	678	1/1/2017	1/1/2017	2K	
855-32	Hydrochlorothiazide 12.5 mg Capsule	0	40	40	REPL	678	1/1/2017	1/1/2017	3L	
183-17	Hydrochlorothiazide 25 mg Tablet	0	50	50	REPL	434	1/1/2017	1/1/2017	3K	
082-01	Glyburide And Metformin Hcl 5/500 mg Tablet	0	40	40	REPL	777	1/1/2017	1/1/2017	3J	
344-10	Glyburide 5 mg Tablet	0	55	55	REPL	768	1/1/2016	1/1/2016	3I	
855-32	Hydrochlorothiazide 12.5 mg Capsule	30	10	40	RTS	678	1/1/2017	1/1/2017	3L	
344-10	Glyburide 5 mg Tablet	45	10	55	RTS	768	1/1/2016	1/1/2016	3I	
183-17	Hydrochlorothiazide 25 mg Tablet	42	8	50	RTS	434	1/1/2017	1/1/2017	3K	
079-32	Cyclobenzaprine Hcl 10 mg Tablet	90	10	100	RTS	678	1/1/2017	1/1/2017	2K	
078-21	Cyclobenzaprine Hcl 5 mg Tablet	85	15	100	RTS	546	1/1/2018	1/1/2018	2L	
082-01	Glyburide And Metformin Hcl 5/500 mg Tablet	35	5	40	RTS	777	1/1/2017	1/1/2017	3J	

** This report may contain SENSITIVE data **

1 of 1

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✉ **Running**   ▼ **Run** **Pause**

When this option is enabled, the message will appear on all reports. The example displays the default message; however, you can have the message changed to suit your pharmacy's requirements.

NOTE: This option is enabled in a system configuration file. Call the number on the sticker attached to your unit if you would like this option enabled at your site.

Creating audit reports

The Max's reporting feature lets you create several reports that log audited activities.

The following audit reports are available:

- Audit Cell. Displays any changes to audited cell parameters and the operator who made them.

Audit Cell   8/18/2008 01:02:54 PM

Monday, August 18, 2008 to Monday, August 18, 2008

Drug Name: Alprazolam 0.25 Mg Tablet
Drug Code: 002282027
Location: 1A

Value Name	Previous Value	Current Value	Operator	Timestamp
LotExpiration	6/1/2010	9/1/2011	Tester	8/18/2008 12:57:52 PM
LotExpiration		6/1/2010	Tester	8/18/2008 12:57:30 PM
LotNumber	rr4455	gghhyy	Tester	8/18/2008 12:57:52 PM
LotNumber		rr4455	Tester	8/18/2008 12:57:30 PM
Quantity	961	2000	Tester	8/18/2008 12:57:52 PM

- Audit Drug. Displays any changes made to audited drug parameters and the operator who made them.

Audit Drug

Monday, August 18, 2010 to Monday, August 18, 2010

Drug Name: Testdrug
Drug Code: 987987987

Value Name	Previous Value	Current Value	Operator
BackImprint		back	Drew
CellNozzleHeight		1.75	Drew
CellNozzleWidth		A.25	Drew
FrontImprint		front	Drew

- Audit Operator. This report displays all actions performed by a specified operator during a given date range. These actions include cell replenishments, return-to-stocks, adding cells, adding new drugs, deleting cells and modifying cell/drug values.

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Audit Operator

3/22/2010 1:31:43 PM

Monday, March 15, 2010 to Monday, March 22, 2010

Operator: tc

Audit Drug

Drug Name	Drug Code	Value Name	Previous Value	Current Value	Timestamp

Audit Cell

Drug Name	Drug Code	Value Name	Previous Value	Current Value	Timestamp
Ibuprofen 800 mg Tablet	00591-3466-05	Quantity	40	79	3/16/2010 2:42:50 PM
Ibuprofen 800 mg Tablet	00591-3466-05	Quantity	0	40	3/16/2010 2:42:46 PM
Eplerenone 50 mg Tablet	60505-2652-03	Quantity	300	0	3/16/2010 9:14:44 AM
Eplerenone 50 mg Tablet	60505-2652-03	LastEmptiedDate	3/15/2010 12:00:00 AM	3/16/2010 12:00:00 AM	3/16/2010 9:14:42 AM
Eplerenone 50 mg Tablet	60505-2652-03	LotExpiration	2/1/2010	6/1/2013	3/16/2010 9:14:07 AM
Eplerenone 50 mg Tablet	60505-2652-03	LotNumber	hr7570	gfr4e	3/16/2010 9:14:07 AM
Eplerenone 50 mg Tablet	60505-2652-03	Quantity	0	300	3/16/2010 9:14:06 AM
Eplerenone 25 mg Tablet	60505-2651-03	Quantity	170	195	3/15/2010 3:28:32 PM
Invega 6 mg Tablet	50458-0551-01	LotExpiration	2/1/2010	9/1/2012	3/15/2010 2:57:32 PM
Invega 6 mg Tablet	50458-0551-01	LotNumber	2wsx	8gg644	3/15/2010 2:57:32 PM
Invega 6 mg Tablet	50458-0551-01	Quantity	650	680	3/15/2010 2:57:32 PM

- **Cell Last Emptied.** This report includes the "Operator" column, which records the name of the operator(s) who certified a cell was empty.

![Parata logo]

Cell Last Emptied

3/22/2010 1:28:17 PM

Drug Name	Drug Code	Loc	Last Emptied	Days Since Empty	Operator
Amitriptyline Hcl 100 mg Tablet	00781-1490-01	1C	3/3/2010	19	
Bupropion Hcl Er 150 mg Tablet	67767-0133-60	1D	3/3/2010	19	
Bupropion Hcl Er 300 mg Tablet	10370-0102-03	1E	3/3/2010	19	
Chest Congestion Relief 400 mg Tablet	49348-0729-09	1J	3/3/2010	19	
Diltiazem Cd 180 mg Capsule	00228-2577-03	2A	3/3/2010	19	
Divalproex Sodium Dr 500 mg Tablet	62756-0798-88	2B	3/3/2010	19	
Eplerenone 25 mg Tablet	59762-1710-03	2C	3/3/2010	19	
Eplerenone 25 mg Tablet	60505-2651-03	2D	3/3/2010	19	
Eplerenone 50 mg Tablet	60505-2652-03	2E	3/15/2010	7	ca
Eplerenone 50 mg Tablet	60505-2652-03	2E	3/15/2010	7	ca
Fluoxetine 10 mg Capsule	00781-2823-01	2G	3/16/2010	6	ca
Galantamine 8 mg Tablet	00555-0139-09	2H	3/22/2010	0	ca

- **Locking Cell Activity.** Lists all replenishments, return-to-stocks and Inventory edits completed on locking cells during the specified interval, including the operator who performed these actions.

Locking Cell Activity

2/12/2010 10:45:57 AM

Wednesday, February 10, 2010 to Friday, February 12, 2010

Drug Code	Drug Name	Cell Loc	Orig Qty	Add Qty	New Qty	Activity Type	Operator	Activity Date
10370-0102-03	Bupropion Hcl Er 300 mg Tablet	1E	640	30	670	Replenish	pharmacist	2/12/2010 10:36:05 AM
00781-1490-01	Amitriptyline Hcl 100 mg Tablet	1C	239	100	339	Replenish	pharmacist	2/12/2010 10:36:49 AM
67767-0133-60	Bupropion Hcl Er 150 mg Tablet	1D	450	0	450	EditInventory	tech3	2/10/2010 2:06:31 PM

Printed documents are uncontrolled.

- **Audit Replenish.** Lists replenishments and return-to-stocks with the IDs of the operator who processed them and the *Pharmacist*-level (or authorized) operator who approved them.

Audit Replenish Report

11/18/2015 8:10.09 AM

** This report may contain SENSITIVE data **

Tuesday, November 17, 2015 to Wednesday, November 18, 2015

Replenish Date	Drug Code	Drug Name	Schedule	Manufacturer	Orig Qty	Add Qty	New Qty	Type	Lot No	Lot Exp Date	Use By Date	Loc	Operator	Approval Operator	Approval Date
11/17/2015 12:29:05 PM	003781809	Levothyroxine Sodium 100 mcg Tablet	RX	MYLAN PHARMACEUTICALS INC	40	0	40	RTS	N/A	11/17/2015	N/A	3L	t4	p1	11/17/2015 12:29:20 PM

- **Manual Fill Log.** This report includes the "Operator" column, which records the IDs of the operators who performed manual fills.

Manual Fill Log

1/4/2012 5:12:13 PM

Friday, July 01, 2011 to Wednesday, January 04, 2012

Order Number	Patient	Drug Name	Drug Code ^ = Locking Cell	Lot No.	Vial Qty	Script Qty	Entry Date	Expiration Date	Complete State	Operator
M01714507	Manual Fill	Aspirin 325mg	00000-1925-28	zb4d127	25	25	8/1/2011 9:37:16 AM	N/A	ReturnedTo Stock	Admin
M01714508	Manual Fill	Aspirin 325mg	00000-1925-28	zb4d127	25	25	8/1/2011 9:57:01 AM	3/1/2012	ScannedOut	Admin
M01714509	Manual Fill	Aspirin 325mg	00000-1925-28	zb4d127	30	30	8/3/2011 4:37:11 PM	N/A	ReturnedTo Stock	Admin
M01714510	m	Aspirin 325mg	00000-1925-28	zb4d127	25	25	8/4/2011 1:59:45 PM	N/A	ReturnedTo Stock	
M01714512	m	Aspirin 325mg	00000-1925-28	zb4d127	25	25	8/4/2011 1:59:46 PM	N/A	ReturnedTo Stock	
M01714513	m	Aspirin 325mg	00000-1925-28	zb4d127	25	25	8/4/2011 1:59:46 PM	N/A	ReturnedTo Stock	
M01714514	Manual Fill	Aspirin 325mg	00000-1925-28	zb4d127	25	25	8/4/2011 2:44:54 PM	N/A	ReturnedTo Stock	
M01714515	Manual Fill	Aspirin 325mg	00000-1925-28	zb4d127	25	25	8/4/2011 2:44:54 PM	N/A	ReturnedTo Stock	
M01714517	Manual Fill	Aspirin 325mg	00000-1925-28	zb4d127	25	25	8/4/2011 2:49:03 PM	3/1/2012	ScannedOut	Admin
M01714518	Manual Fill	Aspirin 325mg	00000-1925-28	zb4d127	25	25	8/4/2011 2:49:03 PM	3/1/2012	ScannedOut	Admin
M01714519	Manual Fill	Aspirin 325mg	00000-1925-28	zb4d127	25	25	8/4/2011 2:49:03 PM	3/1/2012	ScannedOut	Admin
M01714520	Manual Fill	Hydrocodone/Apap 7.5/660 mg Tablet	00591-0502-01	123	11	11	8/4/2011 3:12:21 PM	8/4/2012	ScannedOut	
M01714521	Manual Fill	FIBER CAPSULES	81131-0898-73	5538	10	10	8/4/2011 3:14:27 PM	8/4/2012	ScannedOut	

The Manual Fill Log report can be filtered to display only manual fills done with inventory housed in locking cells.

- **Operator Actions.** Displays audited actions performed on the Max by a given operator during a specified interval.

Operator Actions

3/22/2010 12:11:14 PM

Monday, March 15, 2010 to Monday, March 22, 2010

Action	Operator	Timestamp
Advance Prescription	tech2	3/16/2010 2:50:36 PM
Advanced System Functions	Admin	3/15/2010 3:50:03 PM
Advanced System Functions	Admin	3/16/2010 9:16:55 AM
Advanced System Functions	Admin	3/16/2010 1:42:03 PM
Advanced System Functions	Admin	3/16/2010 2:40:39 PM
Advanced System Functions	Admin	3/16/2010 2:54:21 PM
Advanced System Functions	Admin	3/16/2010 4:00:15 PM
Advanced System Functions	Admin	3/18/2010 9:08:45 AM
Advanced System Functions	Admin	3/18/2010 9:48:04 AM
Advanced System Functions	Admin	3/18/2010 10:27:51 AM
Advanced System Functions	Admin	3/18/2010 12:47:07 PM
Advanced System Functions	Admin	3/18/2010 12:48:28 PM
Advanced System Functions	Admin	3/18/2010 1:01:06 PM
Advanced System Functions	Admin	3/18/2010 1:18:24 PM
Advanced System Functions	Admin	3/18/2010 3:00:24 PM
Advanced System Functions	Admin	3/19/2010 9:04:29 AM
Clean Database	Admin	3/19/2010 9:45:20 AM
Configuration	Admin	3/16/2010 3:10:14 PM
Configuration	Admin	3/16/2010 3:12:36 PM
Configuration	Admin	3/16/2010 3:12:36 PM
Configuration	Admin	3/16/2010 3:12:39 PM
Configuration	Admin	3/16/2010 3:58:51 PM
Configuration	Admin	3/16/2010 3:58:56 PM
Delete Prescription	tech4	3/15/2010 3:27:08 PM

1 of 10

See Error! Reference source not found. for more information.

Report Settings

The **Setup** tab lets you perform the following actions:

- Select one or more printers for printing report output

- Select the default export file type

- Enable/disable individual reports

Build Report | View Report | Setup

Report Printer

None
Microsoft XPS Document Writer
Lexmark E234n PS3

1/1

Export Type

PDF ●

Excel ○

Enable/Disable Reports

Audit Cell	Displays any changes to cell parameters by operator.	✓
Audit Drug	Displays any changes to drug parameters by operator.	✓
Audit Operator	Displays audited actions performed on the machine by a given operator during a specified time range.	✓
Audit Replenishments	Lists audit information for replenishments and Return-to-Stock procedures.	✓
Cell Last Emptied	Lists all drugs set up in the machine and the last time the cell was empty.	✓
Cell Settings	Displays the current settings for all the cells in the machine.	✓

1/4

3 Paused

Run | Pause

Touch any check mark to disable the corresponding report type.

Printing a report

You can print reports directly from the Max, or import them into a spreadsheet and print them from the application.

NOTE: The **Zoom in /Zoom out** buttons have no effect on printed output.

Once you have set up and selected a printer, touch the **Print** button (on the **View Report** tab) to print the report.

Exporting a report

When you *export* a report, it is created in PDF or Excel format, depending on the setting on the **Setup** tab. The default format is PDF.

NOTE: The Export function requires you to use the Folder/File Location windows to select a file location.

To export a report

1. Once you are satisfied with your report's output, touch the **Export** button.

2. Select a file location for the exported report, and touch the **Complete** button.

   The system names the file in the form <ReportName_Date_TimeStamp>.

   Example:

   DispenseReport_6-13-2015_12-46-42-9375000

3. If you intend to further process the exported report, copy the file to a portable storage device. (See **Error! Reference source not found.**.)

   NOTE: When printing an exported report with many columns, you may need to adjust the page margins to print the report on one page.

Exporting a report to a thumb drive

NOTE:These instructions assume you have launched the Reports facility, and have selected and built your report.

It is also assumed that you have inserted a USB thumb drive into USB-1 or USB-2. Use USB-1 if you launched Reports from the *Prescription screen*, USB-2 if you launched Reports from the *Inventory screen*.

Figure 24: USB-1 (the top USB port) is identified here.

To export a report to a thumb drive

To export a Parata Max report in either Adobe Acrobat PDF (.pdf) or Microsoft Excel (.xls) format and copy the exported file to a portable USB storage device:

1. Having selected and created a report, touch the **Setup** tab to display the setup controls.

Parata 🔓		⚙ 🏠
Build Report	**View Report**	**Setup**

Report Printer | **Export Type**

None
Microsoft XPS Document Writer
Lexmark E234n PS3

Export Type

PDF ⦿

Excel ○

⬅ 1/1 ➡

Enable/Disable Reports

Audit Cell	Displays any changes to cell parameters by operator.	✓
Audit Drug	Displays any changes to drug parameters by operator.	✓
Audit Operator	Displays audited actions performed on the machine by a given operator during a specified time range.	✓
Audit Replenishments	Lists audit information for replenishments and Return-to-Stock procedures.	✓
Cell Last Emptied	Lists all drugs set up in the machine and the last time the cell was empty.	✓
Cell Settings	Displays the current settings for all the cells in the machine.	✓

⬅ 1/4 ➡

3 ✉ Paused | Run | Pause

2. In the **Export Type** box, select **Excel** if you want to process exported reports with a spreadsheet application. Select **PDF** to export the file in PDF format; this is the default setting.

Printed documents are uncontrolled.
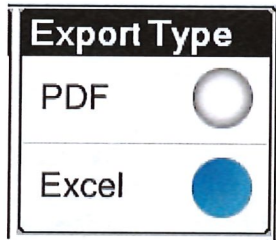
3. After you used the **Setup** tab to designate the export type as either PDF or Excel, touch the **View Report** tab to return to the report you have created.

4. When you are satisfied with the report's output, touch the **Export** button, located at the bottom of the report (*arrow*).
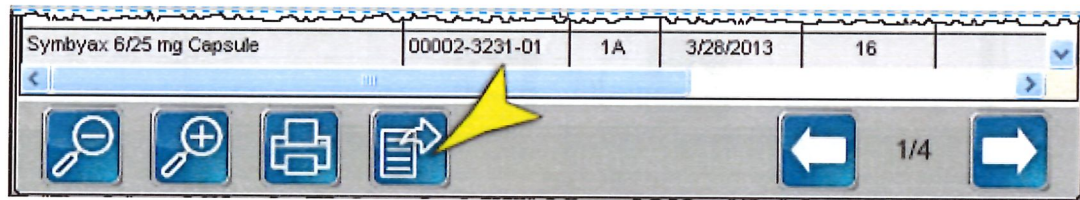
5. The Select Folder window is displayed. Select your thumb drive.

Printed documents are uncontrolled.

| | Build Report | View Report | Setup |

Cell Settings

Drug Name	Drug Code	Loc	Pressure	Nozzle Height	Nozzle Width	Cell Baffle
Darvon-n 100 mg Tablet	00002-0353-01	1A	35	3.25	B.50	4
Darvon						4
Darvoc						5
Seromy						4
Aventyl						4
Aventyl						4
Ceclor						4
Axid 30						4
Lorabid						4
Stratter						4
Stratter						4
Strattera 40 mg Capsule	00002-3229-01	1A	40	2.50	B.75	4
Symbyax 6/25 mg Capsule	00002-3231-01	1A	40	2.50	B.75	4

Select Folder

My Computer
- Fixed (C:\)
- CDRom (D:\)
- Removable (E:\)

1/1   1/4

6. The Select Folder window displays your thumb drive's top-level folder icons. Select the folder/subfolder in which to store the exported report (see *illustration*, below).

Build Report	View Report	Setup

Cell Settings

| Drug Name	Drug Code	Loc	Pressure	Nozzle Height	Nozzle Width	Cell Baffle
Darvon-n 100 mg Tablet	00002-9353-01	1A	35	3.25	B.50	4
Darvon						4
Darvoce						5
Seromy						4
Aventyl						4
Aventyl						4
Ceclor						4
Axid 30						4
Lorabid						4
Stratter						4
Stratter						4
Strattera 40 mg Capsule	00002-3229-01	1A	40	2.50	B.75	4
Symbyax 6/25 mg Capsule	00002-3231-01	1A	40	2.50	B.75	4

Select Folder

E:\

📁 writing test
📁 System
📁 Documents
📁 WinSnap
📁 Development
📁 IMPL-04 Installation
📁 Fonts
📁 Database Backups
📁 Drew_P2K_602G

← 1/1 → 💻 ⤵ ❌ ✔️

🔍➖ 🔍➕ 🖨️ 📑 ← 1/4 →
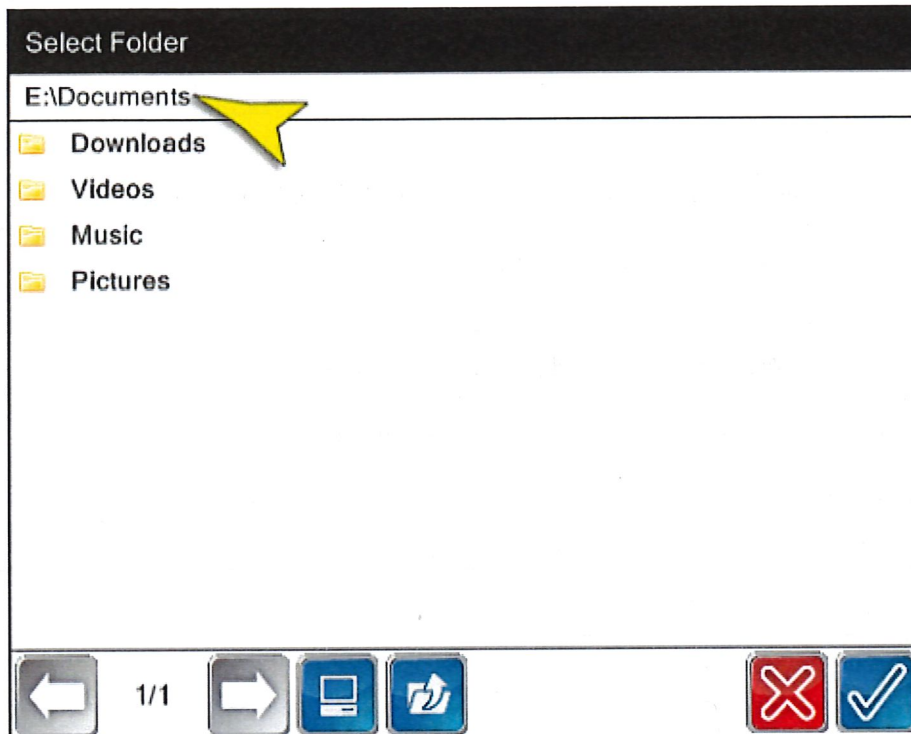
7. When you have selected the file location for the exported report (in this example, E:\Documents is selected), touch the **Complete** button.

NOTE: The report file you have exported will not be displayed in the Select Folder window. It will, however, be viewable when you insert your thumb drive in your workstation/laptop.

The system names the file in the form <ReportName_Date_TimeStamp>.<pdf|xls>

Example:

DispenseReport_4-11-2015_12-46-42-9375000.xls

NOTE: When printing an exported report with many columns, you may need to adjust page margin settings to print the report on one page.

8. Repeat these steps to export additional reports to your thumb drive. (Because you already have specified the file location for your exported reports, you do not need to specify the destination folder again.)

Report column reference

The following table describes the information in each report column.

NOTE: Due to space limitations, some reports use abbreviated column headings (Loc for Location, Qty for Quantity, and so on).

Column head	Description
%Repl	Of the cell's available capacity, the percentage that has been replenished.
30-Dram Capacity	The cell's 30-Dram capacity for the drug it contains.
Add Qty	Pill inventory added to a cell when it was replenished.
Avg Pills/Script	Average number of pills per script for a given drug code.
Baffle	The cell's baffle height setting.
Calibrated	Is the cell calibrated? (Y/N)
Cell State	Active or Deleted
Current Value	Current value of the cell or drug parameter that was modified.
Date Filled	Date the Rx order was filled.
Deleted Date	Date the selected cell was deleted.
Drug Code	The drug's NDC, DIN, or universal drug code.
Drug Name	The name of the drug.
Entry Date	Date the Rx order was processed by the system. Date a selected cell was created or a manual fill was performed.
Loc.	Cell location. The cell ID (for example, 2B).
Lot Exp.	Expiration date of the lot in the stock bottle.
Max Cap	The maximum established capacity for a cell.
NDC Bar code	Nine-digit bar code on the stock bottle identifying the drug's NDC value. You can scan the bar codes displayed in this column to locate cells.
New Qty	Resulting inventory after a cell was replenished (Orig Qty + Add Qty).
Nozzle Height	The cell's nozzle height setting.

Column head	Description
Nozzle Width	The cell's nozzle width setting.
Operator	The operator ID.
Order No.	The Rx order number.
Orig Qty	Original inventory in a cell when it was replenished.
Pressure	The cell's pressure setting.
Previous Value	Previous value of the parameter that was modified.
Qty.	Number of pills dispensed to fill a specific Rx order.
Replenish Date	Date the replenish operation was performed.
Replenish Type	Replenish or ReturnToStock.
Script Count	Number of scripts filled for a given drug code.
Script Total	Total number of scripts for a given drug.
Timestamp	Date/time a cell or drug parameter was modified.
Total Fill Qty	Total number of pills dispensed for a given drug code.
Total Qty	Total number of pills dispensed. Number of manual fills performed by a given operator.
Total Scripts	Total number of scripts processed for a particular drug.
Value Name	Name of the cell or drug parameter that was modified (e.g. LotNumber).
Vial No.	For a single vial fill, this value always is 1. For a multi-vial fill, it corresponds to the vial number in the group of vials used to fill the Rx order; i.e. 1 of 2, 2 of 2.