



NHS Dental Services

E Reporting Good Practice Guide

Amending a Template: Duplicating reports, queries and copying tables

Supporting the NHS, supplying the NHS, protecting the NHS

NHS Dental Services is a service provided by the NHS Business Services Authority



Duplicating a report

Must be in Edit Report

Enter Your
Range of schedule months requested from January 2010 to De
Range of schedule months returned by the system from Janua
December 2010

Patient Charge Band	Number of FP17s
Band 1	137,612
Band 2	68,645
Band 3	10,649
Charge exempt	5,802
Domiciliary Visit Only	296
Ortho Appliances	64
Orthodontic Claim	2,809
Reg 11 Replacement Appliance (Ortho)	74

Report 1

Duplicating a report is used when different elements of the data need to be shown in separate reports.

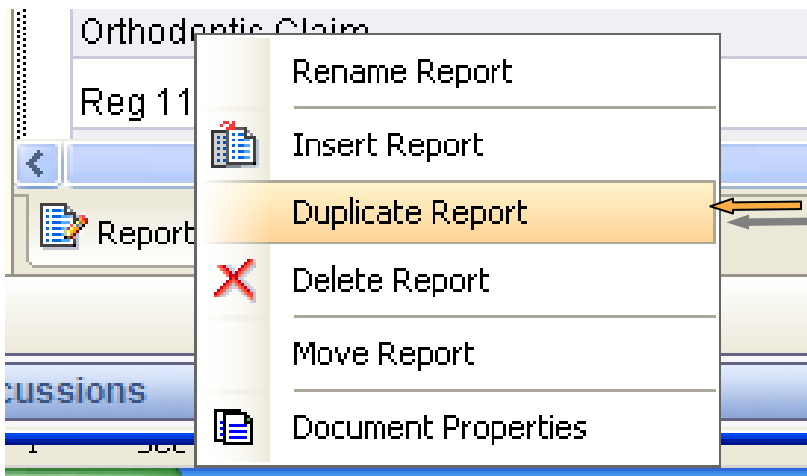
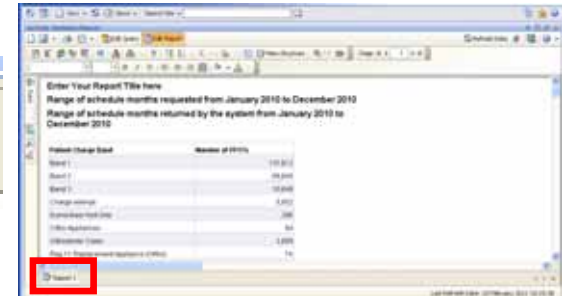
It allows all the formatting to remain the same.

It can be useful when you want to change elements of a report. A copy allows you to experiment without losing the original data and format.



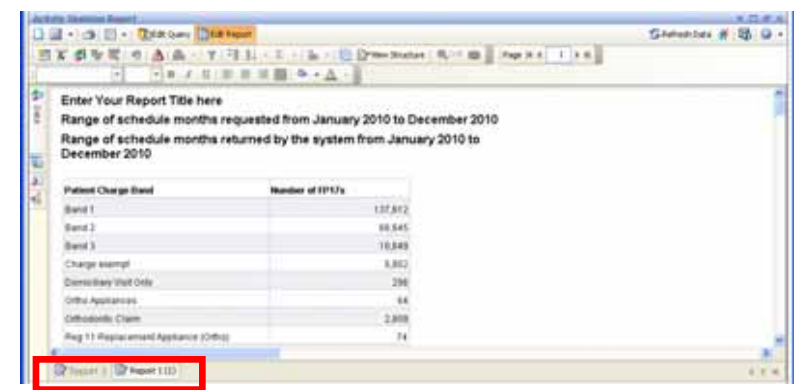
Duplicating a report

Right Click on the Report tab you wish to duplicate



Select Duplicate Report

A duplicate report will be created



Duplicating a report

The duplicate report can now be altered

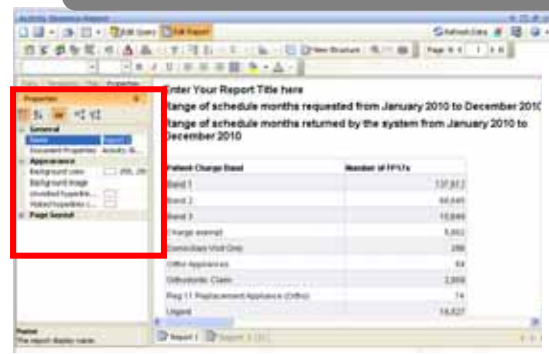
FP17s by Schedule Month
Range of schedule months requested from January 2010 to C
Range of schedule months returned by the system from Jan
December 2010

Schedule Month (YYYYMM)	Number of FP17s
201001	14,112
201002	24,777
201003	25,449
201004	20,358
201005	18,168
201006	18,410
201007	24,698
201008	19,670

Rename the report by right clicking on the tab as before and selecting Rename Report

Type the name of the report and press enter/return

- Rename Report
- Insert Report
- Duplicate Report
- Delete Report
- Move Report
- Document Properties



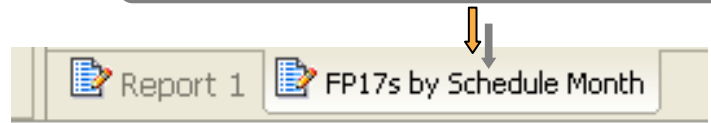
Properties

General

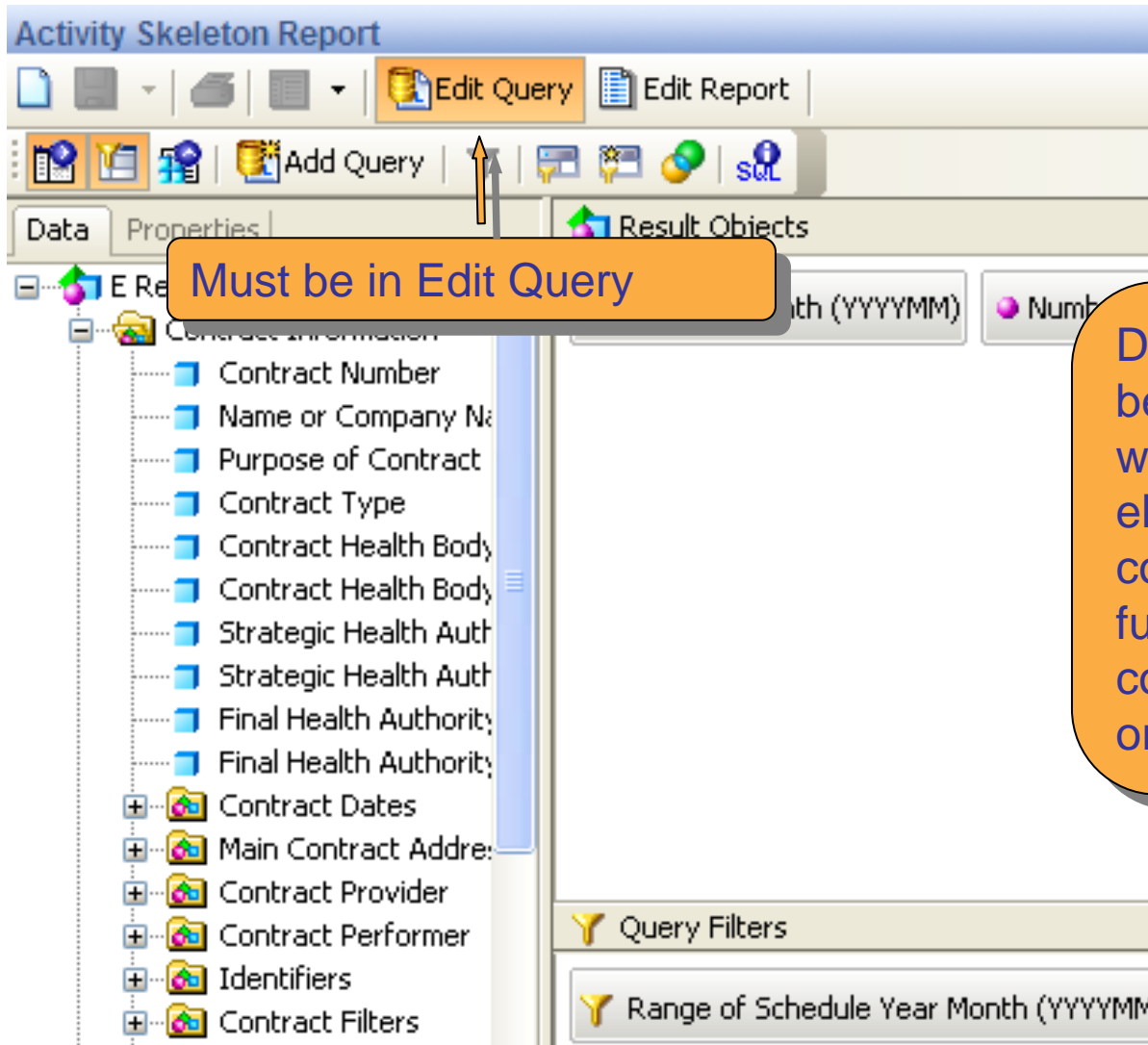
Name	FP17s by S...
Document Properties	Activity Sk...

Appearance

The report name will change



Duplicating a query

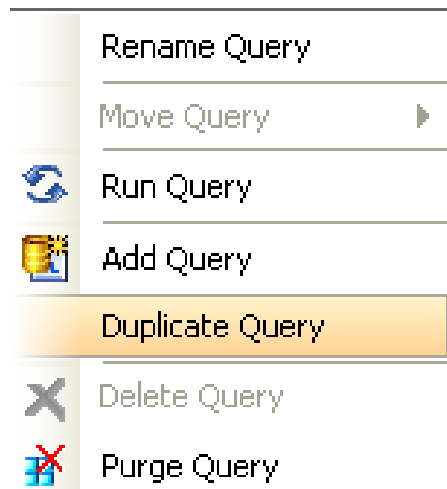
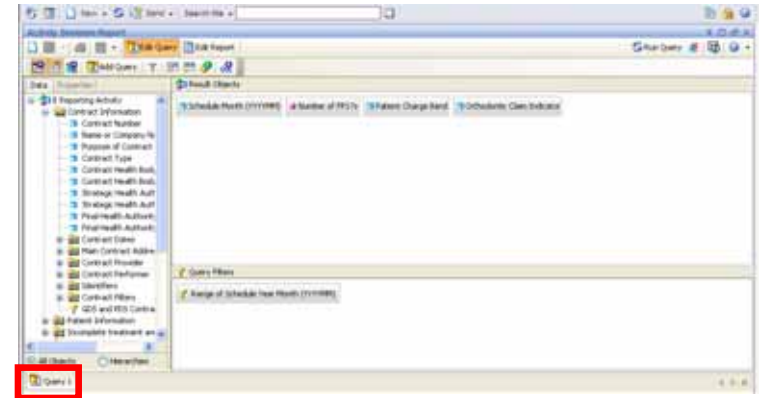


Duplicating a query can be useful when you want to change elements of a report, a copy allows you to add further data without compromising the original findings

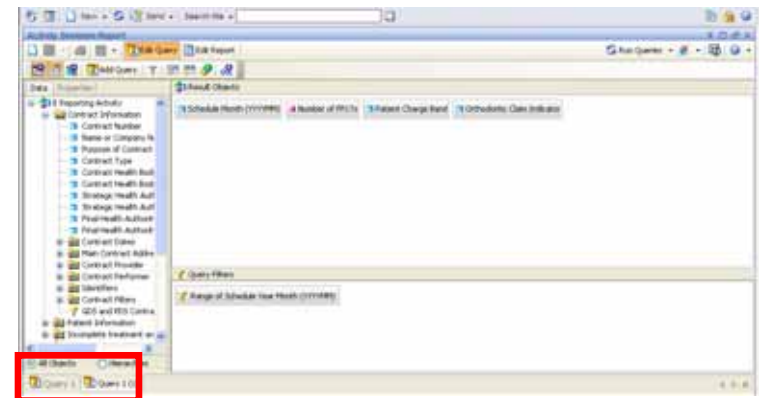


Duplicating a query

Right Click on the Query tab you wish to duplicate



Select Duplicate Query



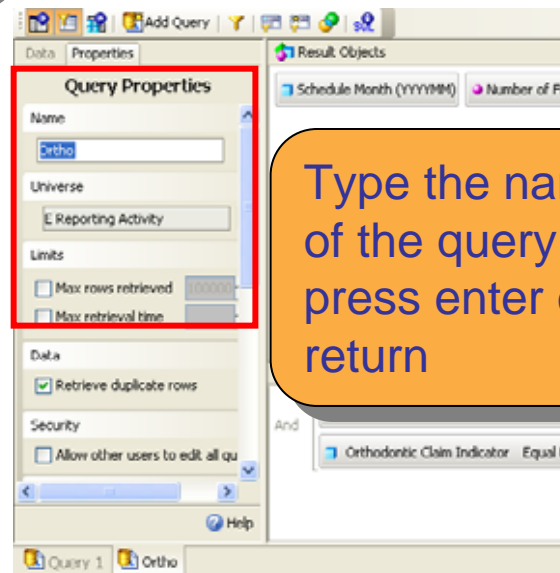
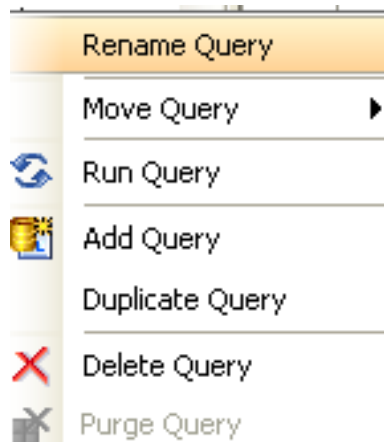
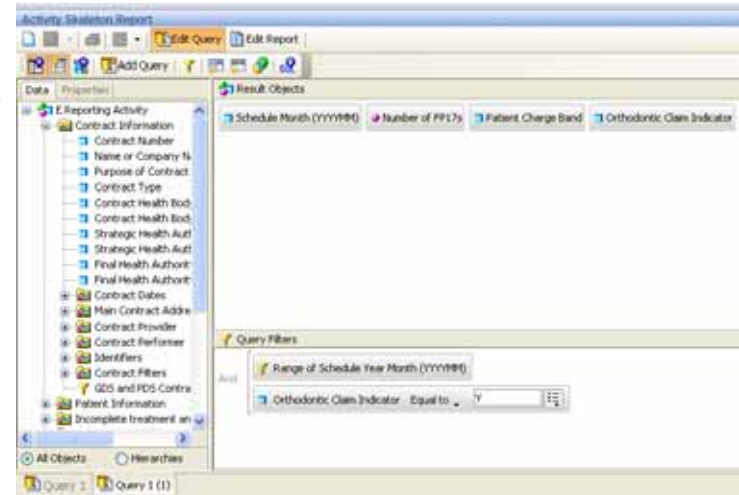
A duplicate query will be created



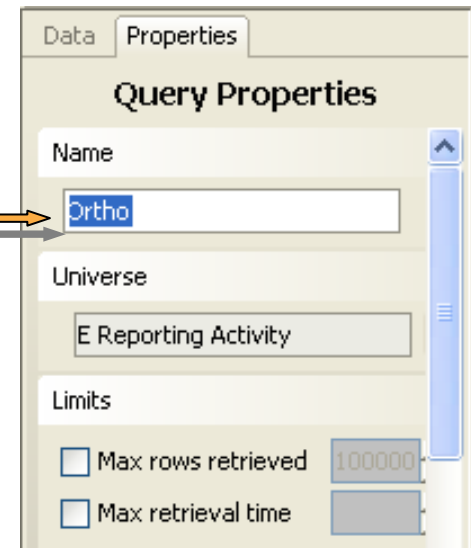
Duplicating a query

The duplicate query can now be altered by adding data or filters

Rename the query by clicking on the tab as before and selecting Rename Query



Type the name of the query and press enter or return



The query name will change



Duplicating a query

Query | Edit Report

Result Objects

- Schedule Month (YYYYMM)
- Number of FP17s

Query Filters

And

- Range of Schedule Year Month (YYYYMM)
- Orthodontic Claim Indicator Equal to N

Run Queries

- Non Ortho
- Ortho
- Run all queries

Queries that have been changed or duplicated then need to be run

Run Queries

- Non Ortho
- Ortho
- Run all queries

Queries can be run individually or all queries together

Duplicating a query

When the queries have run you can choose how the new data is shown in the report

A new unformatted table is created for the new data

The screenshot shows a dialog box titled "New Query" with a close button (X) in the top right corner. The main text inside the dialog reads: "Choose how you want to include the data from the new query." Below this text are three radio button options:

- Insert a table in a new report
- Insert a table in the current report
- Include the result objects in the document without generating a table

At the bottom of the dialog are two buttons: "OK" and "Help".

Callouts with arrows point to each option:

- An arrow points from the first callout box to the selected radio button.
- An arrow points from the second callout box to the second radio button.
- An arrow points from the third callout box to the third radio button.

A new unformatted table is created in the current report if possible

The data is returned but not placed in any existing tables

Copying a table

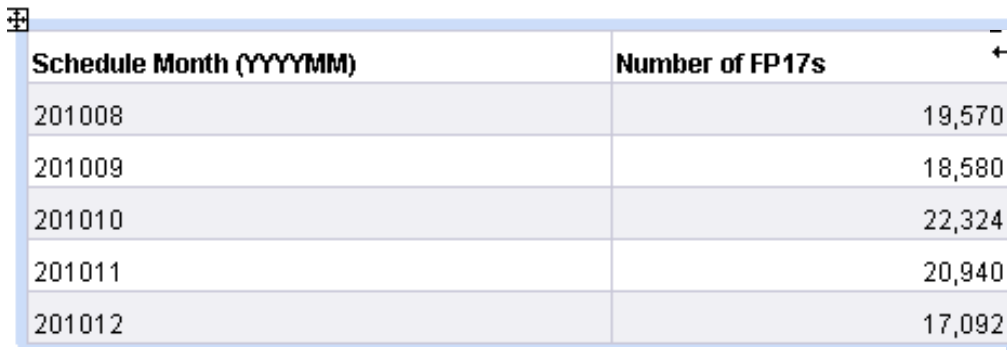
The screenshot shows a software window titled "Activity Skeleton Report". The menu bar includes "Edit Query" and "Edit Report". The "Edit Query" button is highlighted in orange. A callout box with the text "Must be in Edit Query" points to the "Edit Query" button. The left sidebar shows a tree view with "Activity Skeleton Report" expanded, listing fields: "Orthodontic Claim Indicator", "Patient Charge Band", "Schedule Month (YYYYMM)", "Date Range from Prompts", and "Number of FP17s". The main area displays a report title "Enter your report title" and a table with the following content:

Range of schedule mo
Range of schedule mo
December 2010

Patient Charge Band
Band 1
Band 2

Copying a table again allows you to experiment with the format or content of a table without losing the original. It can also be used to create a graph

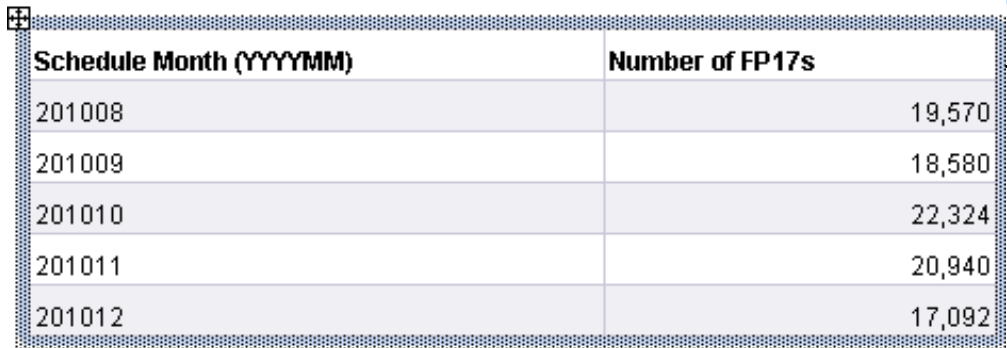
Copying a table



A screenshot of a table with two columns: 'Schedule Month (YYYYMM)' and 'Number of FP17s'. The table contains five rows of data. A mouse cursor is positioned on the right border of the table, and a small crosshair icon is visible at the top right corner of the table's border.

Schedule Month (YYYYMM)	Number of FP17s
201008	19,570
201009	18,580
201010	22,324
201011	20,940
201012	17,092

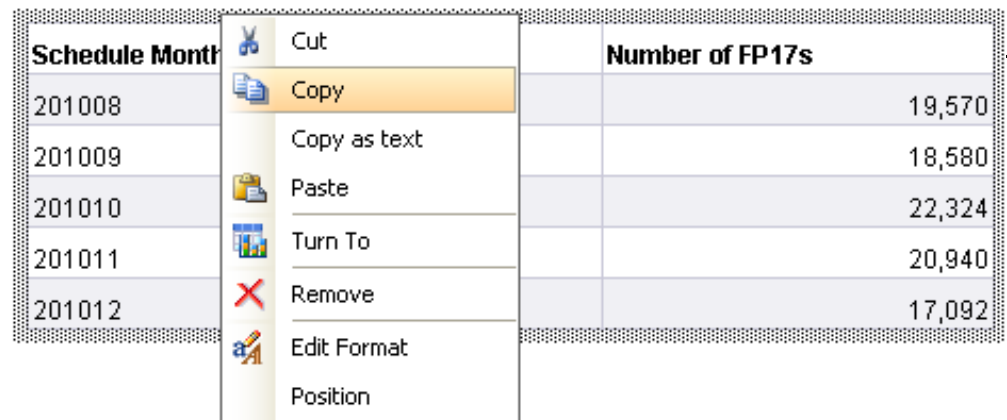
Place cursor on the border of the table



A screenshot of the same table as above, but the border is now grey, indicating it is selected. A mouse cursor is positioned on the right border.

Schedule Month (YYYYMM)	Number of FP17s
201008	19,570
201009	18,580
201010	22,324
201011	20,940
201012	17,092

Left click so that the table border becomes grey



A screenshot of the same table with a context menu open over it. The 'Copy' option is highlighted. The context menu includes options: Cut, Copy, Copy as text, Paste, Turn To, Remove, Edit Format, and Position.

Schedule Month	Number of FP17s
201008	19,570
201009	18,580
201010	22,324
201011	20,940
201012	17,092

- Cut
- Copy
- Copy as text
- Paste
- Turn To
- Remove
- Edit Format
- Position

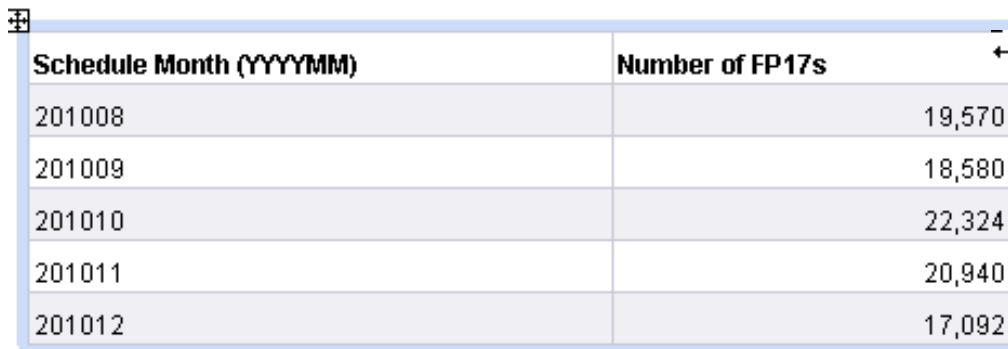
Right click, select copy, then place the cursor where you want the table, right click and paste

Alternatively you can drag while holding down the left mouse click and Ctrl (on the keyboard)



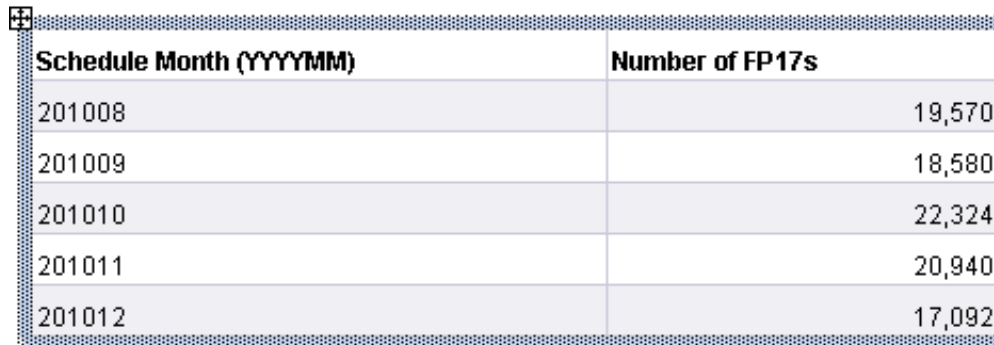
Moving a table

Moving a table is useful when adding other elements or formatting a report



Schedule Month (YYYYMM)	Number of FP17s
201008	19,570
201009	18,580
201010	22,324
201011	20,940
201012	17,092

Place cursor on the border of the table



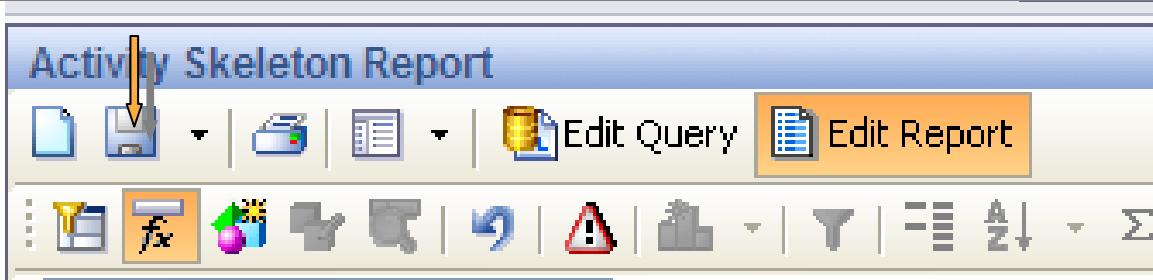
Schedule Month (YYYYMM)	Number of FP17s
201008	19,570
201009	18,580
201010	22,324
201011	20,940
201012	17,092

Left click so that the table border becomes grey then drag the table to where you would like it then release the mouse

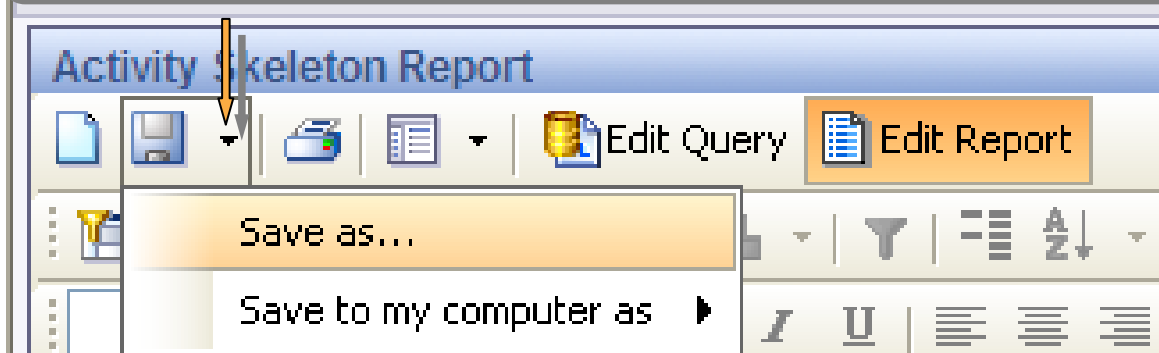


Saving the amended template

Click the icon to save the template with its existing name



Click the arrow and select Save as, you will then be asked to choose where you want to save the template and can rename it if appropriate



This is to save the template and not the results when the report has been run. To save the results click save to my computer as.

