



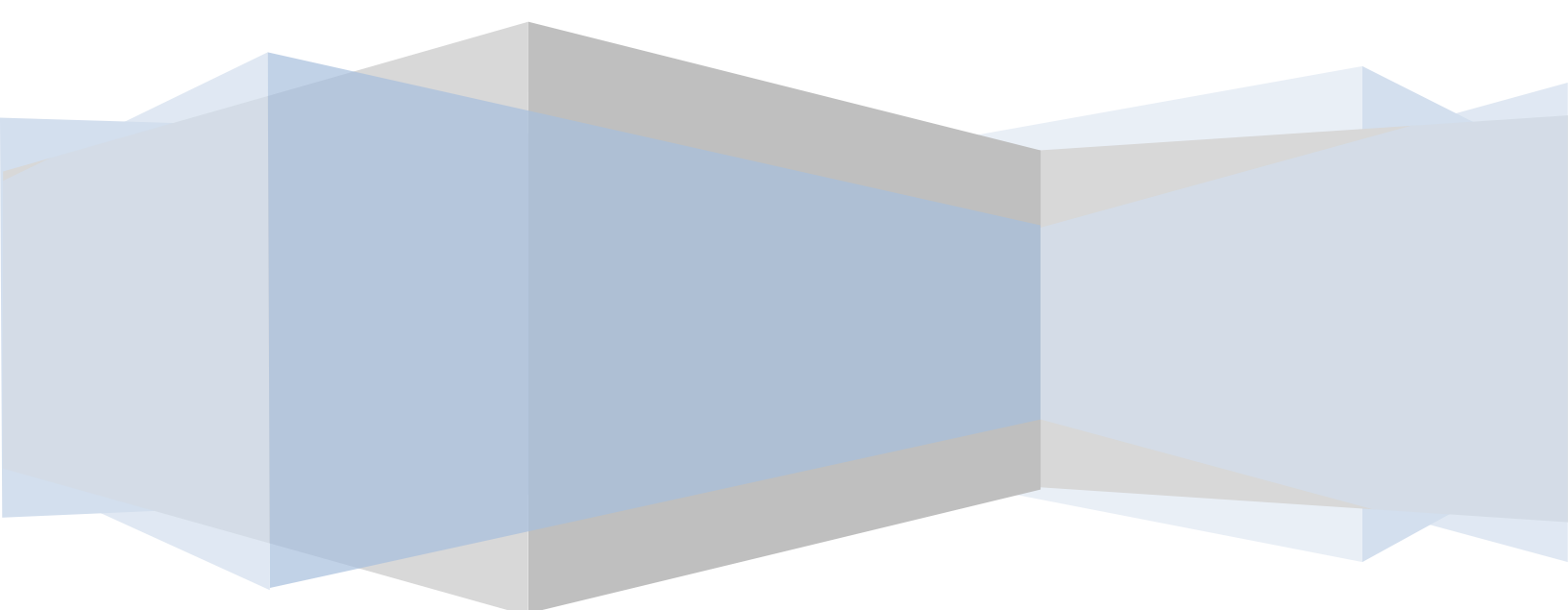
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# DIGITEL REPORT GENERATOR

## Report Genie Manual

Installation, setup and use.

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# DIGITEL REPORT GENERATOR

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# DIGITEL REPORT GENERATOR

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LIMITED WARRANTY

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# DIGITEL REPORT GENERATOR

## INTRODUCTION

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

ReportGenie also lets you report on Reviewed dictations.

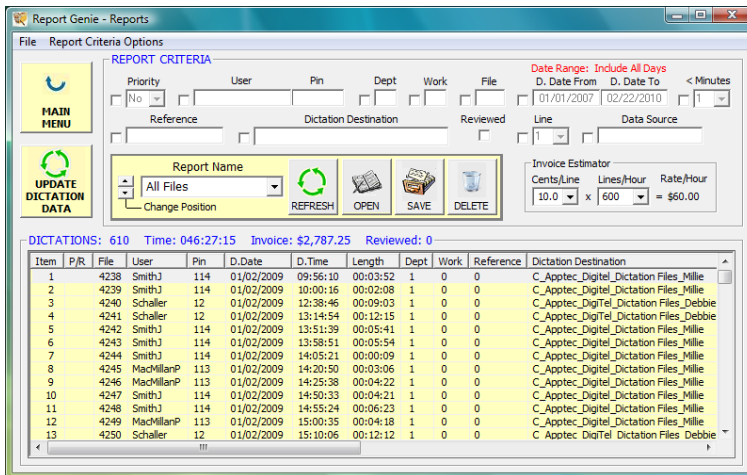
ReportGenie enables you to look-up data about specific dictations in an instant. Its powerful Report Criteria lets you define an unlimited number of reports based on a wide range of criteria. The Report Criteria that you can sort dictation files by includes User Name and Pin, Department Number, Work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

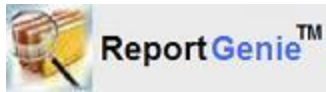
To help you sort and organize the data, a date range can be easily set so only the data within the range of interest is extracted.



- 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!
- Create reports of Reviewed dictations!

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## INSTALLATION

### Host System Requirements

Pentium II or equivalent or better

Memory: 1 MB or greater

Hard Disk: 7 MB or greater

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

### Operating Systems

WINDOWS 2000, 2000/2008 Server, XP, VISTA, WINDOWS 7

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## SOFTWARE INSTALLATION

1. Login as a user with “administrator rights”.
2. Run ReportGenie Installation.exe  
The installation program can be found on the installation CD. You can check if a newer version or updates are available at [www.DigiTelSoftware.com](http://www.DigiTelSoftware.com).

### During the installation process:

1. Do not change the default directory and group where it will install. Allow it to install at c:\Apptec\ReportGenie and allow it to load into the start group.
2. If Windows pops up a message asking “... the file you are copying is older than one on your computer, do you want to keep this file?” answer yes.

ReportGenie will run for a 30-day Evaluation Period prior to a License Key being entered.

### **Make Log Books Folders Shareable** (if needed)

If ReportGenie is running on the same pc as DigiTel then you do not need to make DigiTel’s Log Books folder shareable.

If one or more ReportGenie’s will be accessing the DigiTel Log Books folder 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. The folder you need to make Shareable is 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.

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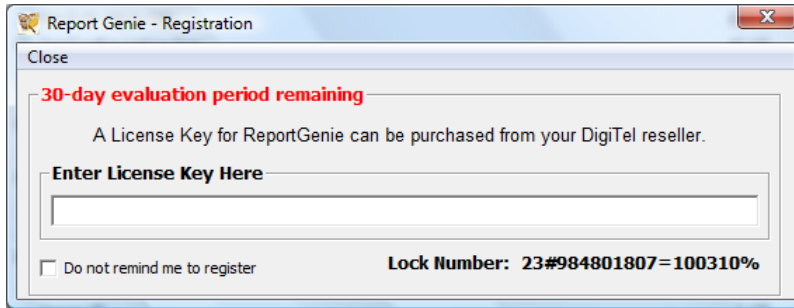
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# DIGITEL REPORT GENERATOR

## REGISTRATION

ReportGenie will run for a 30-day evaluation prior to a License Key being entered into its Registration menu. Simply **Close** this window to begin using it.

A License Key is available for purchase from your ReportGenie reseller or contact [Keys@DigiTelSoftware.com](mailto:Keys@DigiTelSoftware.com) for more information.

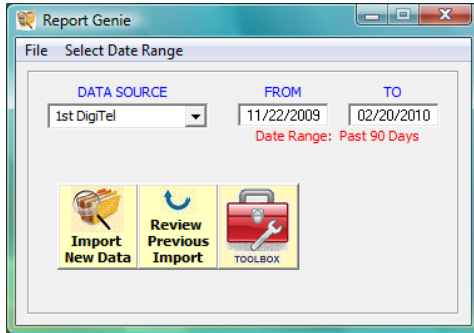


Once you've purchased a ReportGenie License Key, email the **Lock Number** from its Registration menu along with the **POP (Proof-Of-Purchase) Number** (that you will receive after your purchase) to [Keys@DigiTelSoftware.com](mailto:Keys@DigiTelSoftware.com) and you will receive your License Key via Email.

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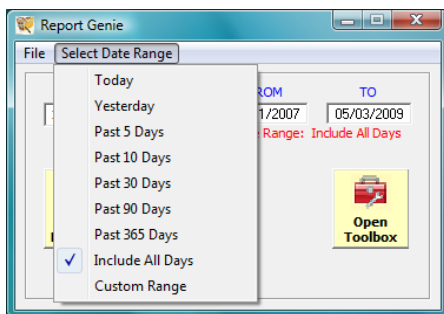
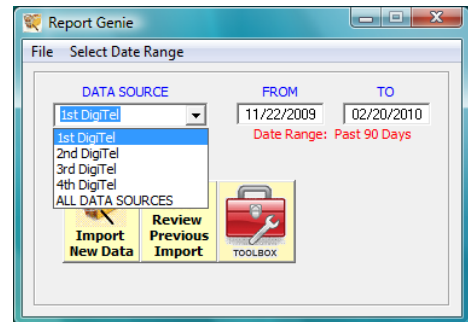
## MAIN MENU

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.

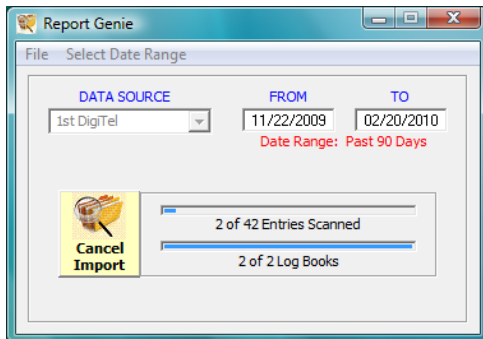


Once you select the **Data Source** and the **Date Range**, click **Import New Data** to import all dictation file data from the selected source that falls within the selected date range.

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.



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.



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**.

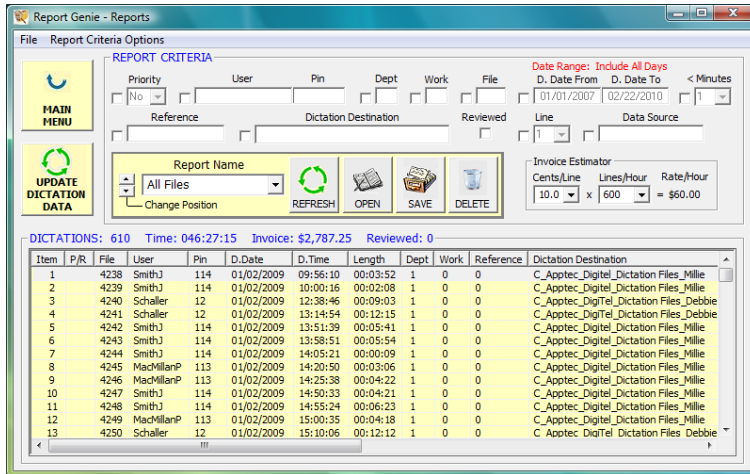


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## REPORTS

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** 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.

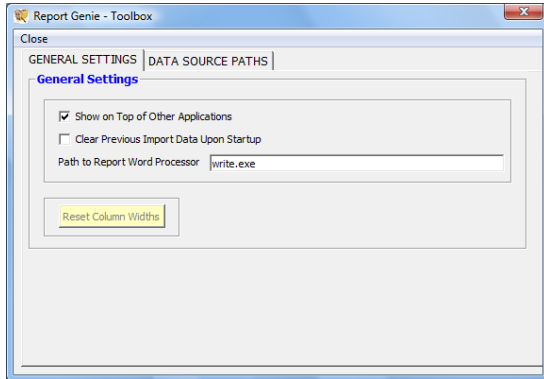
The **Invoice Estimator** section lets you set an invoice rate (Cents/Line) and an average number of lines per hour (Lines/Hour) of dictation to calculate the (Rate/Hour) dollars per hour of dictation. The heading of the dictation list will show the total estimated invoice for that report.

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## TOOLBOX

The **General Settings** menu in the Toolbox lets you set the following features.



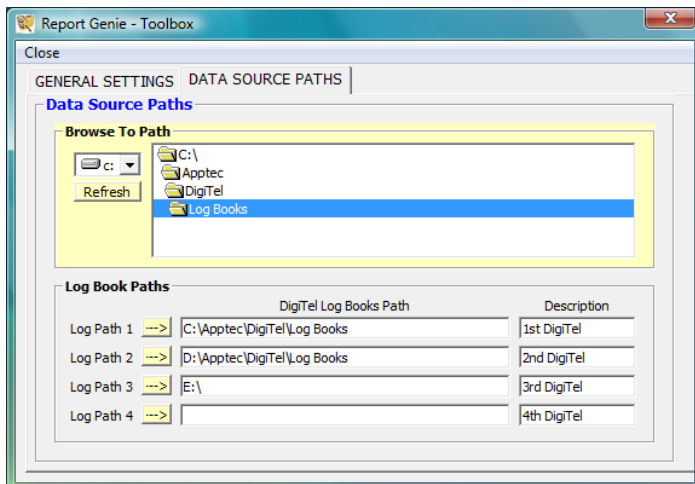
**Show on Top of Other Application** will keep ReportGenie showing on top of other applications.

**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 2<sup>nd</sup>, 3<sup>rd</sup>, and 4<sup>th</sup> 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 range. For example, just show yesterday's 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. List just Reviewed 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 estimated 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 128 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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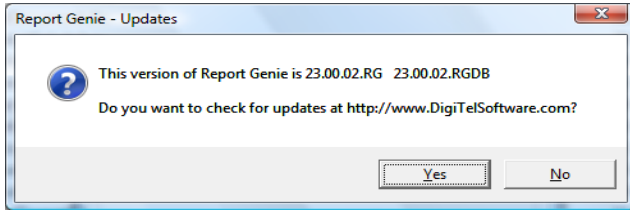


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## SOFTWARE UPDATES

Software updates, full installation packages, and manual updates may be available for ReportGenie.



Click **File, Check for Updates** to open [www.DigiTelSoftware.com](http://www.DigiTelSoftware.com) to check for updates.



Select **Software** for software updates and full installation packages. Select **Documentation** to see revised documentation.

## LIMITED WARRANTY

**Software:** Please see the End-User Software License Agreement and Limited Warranty Coverage agreement located in the product's /License directory or on the installation CD.

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