

# Synergistic Office Solutions, Inc.

**Topic:** Adding a new report to a Reports menu in SOS Products  
**Document ID:#474**  
**Product:** SOS Office Manager for Windows  
SOS Case Manager for Windows  
SOS Appointment Scheduler  
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Additional reports created with Seagate Crystal Reports Pro may be run from within SOS products. Reports created with Crystal versions 7, 8, and 8.5 are compatible with SOS products through release 2005.01. Release 2005.02 and later will run reports created with Crystal versions 7 thru XI. You may add custom reports to the following menu lists:

## **OMWin:**

Reports > Favorites  
Reports > Accounting  
Reports > Insurance  
Reports > Management  
Reports > Other  
Reports > Patients

## **CMWin:**

Reports > Other Reports

## **Appointment Scheduler:**

Reports

To add your new report:

1. Log into the appropriate SOS product **using a supervisor-level ID**.
2. Open the menu list to which you want to add the new report.
3. Right-click in the list (white) area of the window.
4. Select **ADD**.
5. Enter an appropriate description. Note that the entries in the menu list are sorted alphabetically, so the description you choose will determine where your new entry appears in the list.
6. Next to "Report Name" enter the name of the report, including the extension. Crystal reports all have extensions of RPT, so your entry would be in the form: **MYREPORT.RPT**
7. If your custom report is a modification of an existing SOS report that includes patient list security, you must also check the "Report includes all standard formulas: pAccessNum, pLicNum, pLicName" option.

**NOTE:** If you check this option and your report does not include the three indicated formula fields, you will get a 515 error when you try to run the report. If this error should appear, just right-click the report, select **CHANGE**, uncheck the option and save.

8. Click **OK** to save.

That's it! Your report should now appear on the menu. Run it just as you would any of the standard reports.