

# Synergistic Office Solutions, Inc.

Topic: Custom Reports  
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Product: SOS Office Manager for Windows  
          SOS Case Manager for Windows  
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Author: Seth Krieger  
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SOS Office Manager and Case Manager store their data in a Sybase SQL Anywhere (SA) database. The database is accessed through Microsoft's ODBC standard. During installation of the software, your system was configured with the necessary ODBC data source information. Any third party program that is capable of reading an ODBC data source should be able to read the data you have stored in the SOSDATA database. Examples of some popular programs you can use to report, analyze, and graph OMWin data include:

Seagate Crystal Reports  
Microsoft Access  
Microsoft Excel

ODBC connectivity also makes it possible to do labels and merge documents with most high-end word processors such as Microsoft Word. Data stored in the SOS database can be inserted into word processing documents using the word processor's "mail merge" feature.

For more information, see the last chapter (Accessing SOS Data from Other Programs) of the Technical Reference, SOSTECH.PDF, located in your SOS folder.

Other documents you may find helpful include the rather dated, but still relevant, annotated data dictionary:

<http://www.sosoft.com/files/downloads/sosddct.pdf>

...and a set of entity diagrams showing links among tables for the most commonly used data:

<http://www.sosoft.com/files/downloads/sosdpics.pdf>

If you do not have the time or ability to create your own reports, SOS can create reports for you based on your specifications, but **you must have a current support agreement, and you must be using the most current version of the software**. If you have any question about the latter, check the [Download Files page on the SOS web site](#).

To obtain a quote on a proposed report, you will have to provide certain information to us:

1. A typed mock-up of the report as you would like it to look. This requirement can be met using a word processor or spreadsheet program.
2. A list of selection parameters to be used in the report, for

example:

- transaction date range
- patient category
- patient or patient range selection

Selection parameters are the kinds of things that you see on the "setup" window displayed when you run most of the built-in reports.

3. Any grouping and subtotals needed.
4. Ordering of output (such as "alphabetically by patient name" or "grouped by ascending diagnosis code, with patients listed alphabetically within each diagnosis group")
5. Specification by window title and field prompt for any data element that is not obvious. For example, saying that you want totals for each "profit center" is meaningless unless you specify the window and field in the software that you use to designate what you refer to as "profit center".

If you are interested in a customization of an existing report, include the menu selection used to run the existing report.

Once we receive the above information, we will create a proposal for you in the form of a formal custom programming contract, which includes a detailed description of the work to be done, the cost and payment terms, the time frame for completion, and the manner in which the report will be provided to you, such as "by email". The appropriate person in your organization should review that document carefully, especially the attachment that details the work to be done. If it matches your needs, then the contract's signature pages should be completed and returned to SOS, along with payment for the project. All custom work must be pre-paid.