

# WhatPill 1.2, Tutorial 5 - Reports

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(tutorial 5 of 10)

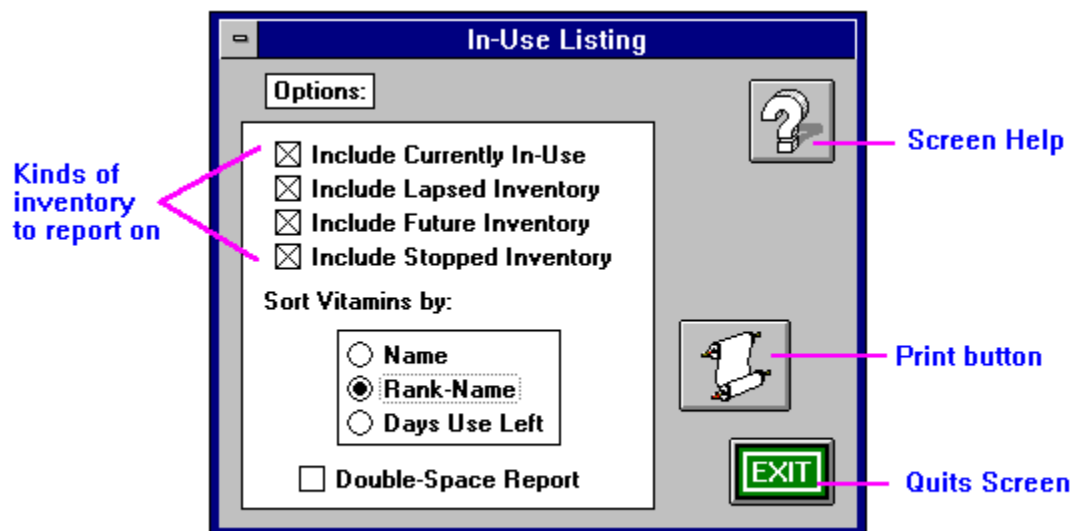
## Topics covered:

- In-Use Report -- Print/Preview screen, Print Prompts, reports in general
- Inventory Report
- Price Lists Reports
- Entry Sheets

Before you get into this tutorial be sure you have your Sample Data in a "refreshed" state. If in any doubt at all, do "Regenerate Sample Data", from submenu "Sample Data", found on WhatPill's Config menu while at the main screen display. That way, your generated reports will correspond to what you see in this tutorial. Two reports are not covered here: the Order List Report and the Purchase History Report. They are covered in the same tutorials that treat their corresponding functions.

## In-Use Report

In discussing this first report, we will also cover the Print/Preview screen used for all report output. Go to the **Reports** menu option from WhatPill's main screen display and select the first option, "In-Use Listing". The below report options screen will come up:



**In-Use Listing Report's Options Screen**

This is perhaps WhatPill's simplest report -- it is good for producing a concise listing of just those supplements you have inventory for, or have checked the USING flag on. It is great for generating a listing of everything you're taking, to hand to your doctor when he asks you about what you're taking in the way of vitamins or medications (you'd just have the one option "Include Currently In-Use" checked for this, probably). It also gives a good quick overview of your inventory status.

For this example, have all four of the top options (kind of inventory) checked, and have the radio button selector set so the report will sort by Rank-Name, as shown in the above screen shot.

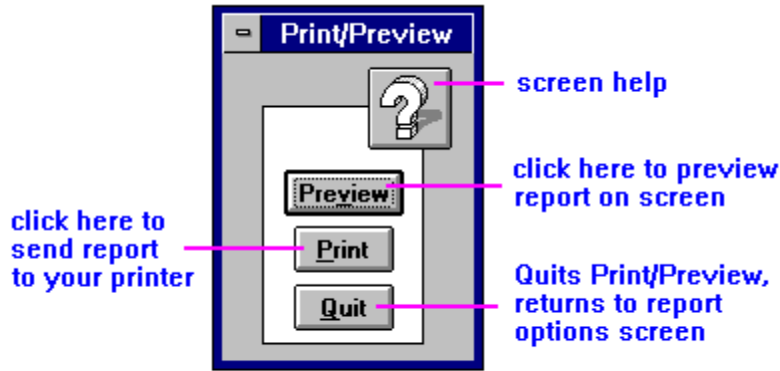
**Note:** This is the first example of a radio button selector control. "Radio buttons" are used when one and only one of several options are to be chosen. Similar to the drop-downs, but you can see all options all the time. Setting the control to one option will automatically clear all other radio button options. Just click on the option desired. (You can also set options solely from the keyboard by up/down arrowing to the desired option and hitting **Enter**.)

By the way, the way you set your options on all of WhatPill's report option screens are "remembered" by WhatPill: the next time you bring the report up, it's options will be set the way you had them the

last time.

**The Print/Preview Screen:** details common to all report printing in WhatPill

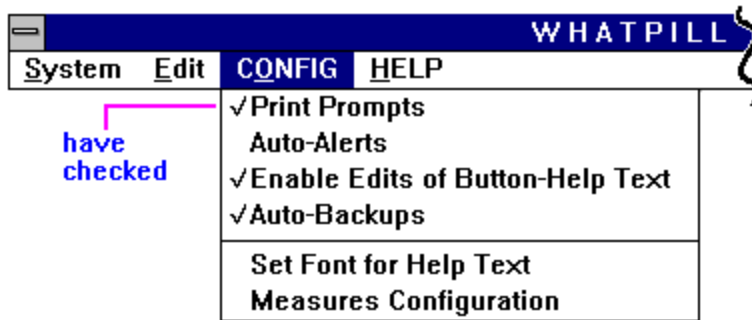
Click on the Scroll button (WhatPill's icon for "print" on all reports) when you have your options set. This will make WhatPill generate the report (you'll see an hour glass momentarily while data is being collected and analyzed). When the report is ready to be printed, the Print/Preview screen pops up, as seen in the below screen shot:



**Print/Preview Screen**

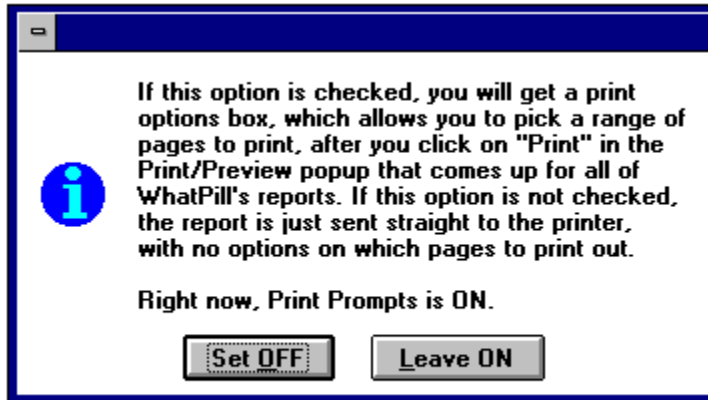
This little box allows you to either preview the report on-screen by clicking on the "Preview" button, or to send your report to your Window's printer via the "Print" button. Click on Preview now and check out the preview function. You will be able to see the entire page at once and be able to zoom in on regions to check details (but it's not a great way to read your reports in depth!). Exit the Preview screen and you return to the Print/Preview screen again. This time, we'll send the report to your printer.

But before clicking on the "Print" button, go to the Config menu and verify that "Print Prompts" is enabled (checked), as seen in the below screen shot of this menu option:



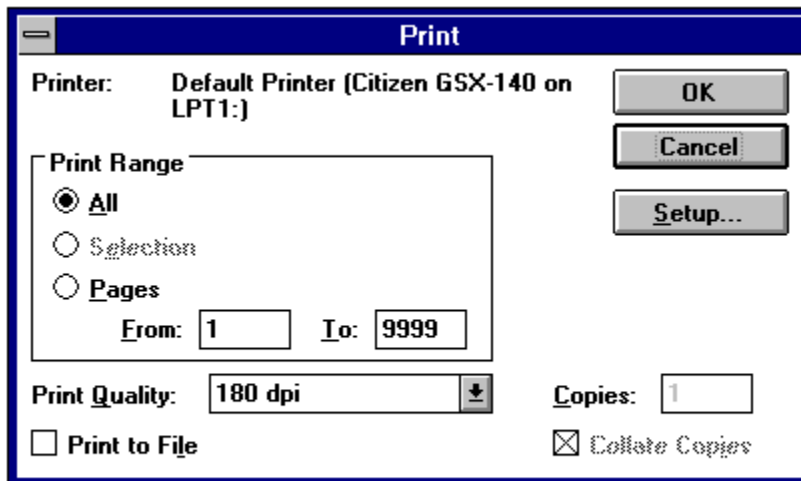
**making sure "Print Prompts" is enabled from WhatPill's Config menu**

If it is not checked (of even if it is), select it. You'll see the options dialogue appear, as below:



**Print Prompts Option Dialogue**

Be sure Print Prompts is set ON. Then, click on the Print button of the Print/Preview screen. Since you have Print Prompts turned on, this next screen will come up, which allows you to pick a range of pages to send to the printer or (by clicking on "Setup...") to select a different printer than your Windows default printer: (if Print Prompts is not checked, your report goes straight to the printer)



**Print Options screen that follows "Print" if Printer Prompts is turned on**

Some of the options you see on this screen will be disabled or enabled depending on the type of printer you have selected. You can see from this screen, besides the fact that the author is too poor to afford a laser printer, the way you can select a range of pages. You'll never have more than one page for this particular report, and on other reports, you won't know exactly which pages to print unless you've printed a similar report before. But it is very handy when, having printed a lengthy report before, you alter some of your data and would like to reprint just the page on which the altered data appears. Note that you can cancel the print job from this screen too. We will look at the screen you get if you click on "Setup..." when we talk about the next

report. For right now, just click on "OK". As your report is being sent to your Windows printer, the below "Printing..." status window will be on-screen, ticking off the pages as they are processed. You can click on the "Cancel" button here as a last-minute abort option, too:



**Printing... status window**

What you see after "Printing:" in this box is the file name for the report **form file** that WhatPill uses to format the report to your printer. It is possible to edit this form file, so you can adjust margins, fonts used, and position (and size) of fields, but that's an advanced topic and one you're not likely to ever need to do anyway. See the tutorial on Editing Reports if you're interested.

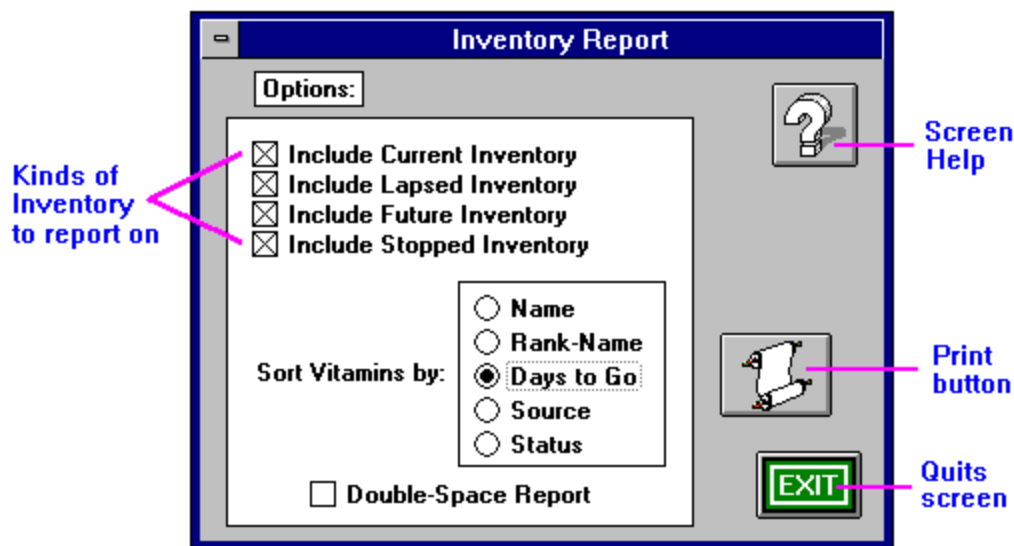
The sample data was designed so there is at least one brand-price having inventory that will fall into all four types of inventory that this report covers: "currently in-use", "lapsed", "future" (has **AsOf** date that is in the future), and "stopped" inventory. Study the report produced -- if it doesn't show all four types of inventory, your sample data's messed up -- regenerate it.

After WhatPill sends the report to the printer, she comes back to the Print/Preview screen. You can continue to select "Preview" or "Print" until the cows come home. Click on "Quit" to return to the report options screen. You may want to try the same report now with different options selected. A good sort option to try out is the "Days Use Left" option -- gives you a nice, concise "hot" list (supplements closest to running out listed first) of your inventory.

Note that there is one brand-price having no inventory listed on this report: Garlic. This is an example of a supplement whose USING flag is set manually, rather than being determined by the state of existing inventory.

## Inventory Report

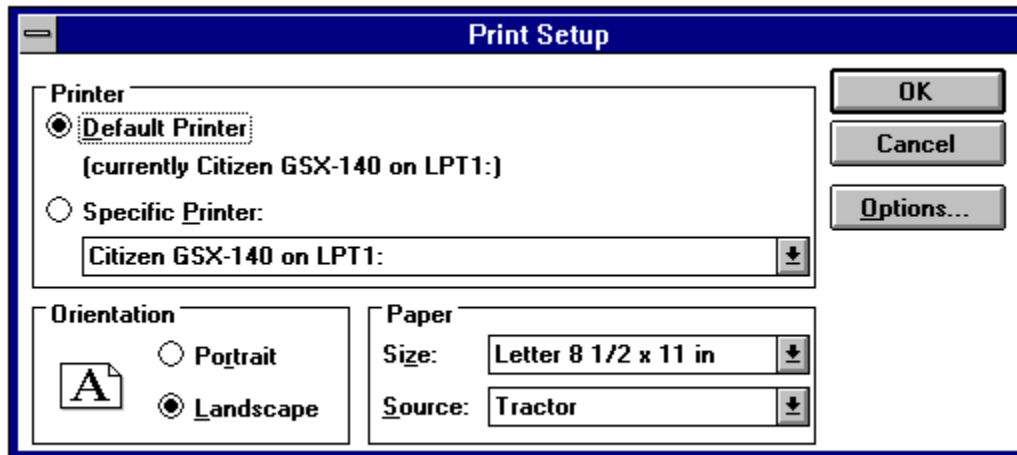
Now let's check out the Inventory Report. Exit the In-Use Listing options screen by clicking on the "Exit" button and go back to the Reports menu, this time selecting "Inventory". The below options screen will appear:



**Inventory Report's Options Screen**

Look familiar? It's almost identical to the In-Use options screen, except that there are two more

sort options. Have all four types of inventory selected and choose "Days to Go" for your sort option for this example. Click on the paper scroll print button, so WhatPill generates the report and throws up the Print/Preview screen. From here, click on "Print", which will bring up the print options dialogue (I'm assuming you still have Print Prompts set on). Before clicking on **OK** to send to the printer, click on **Setup...**, since there's something I want to point out, using this particular report. **Setup...** will bring up the following dialogue:



**Print Setup Dialogue (use for switching printers)**

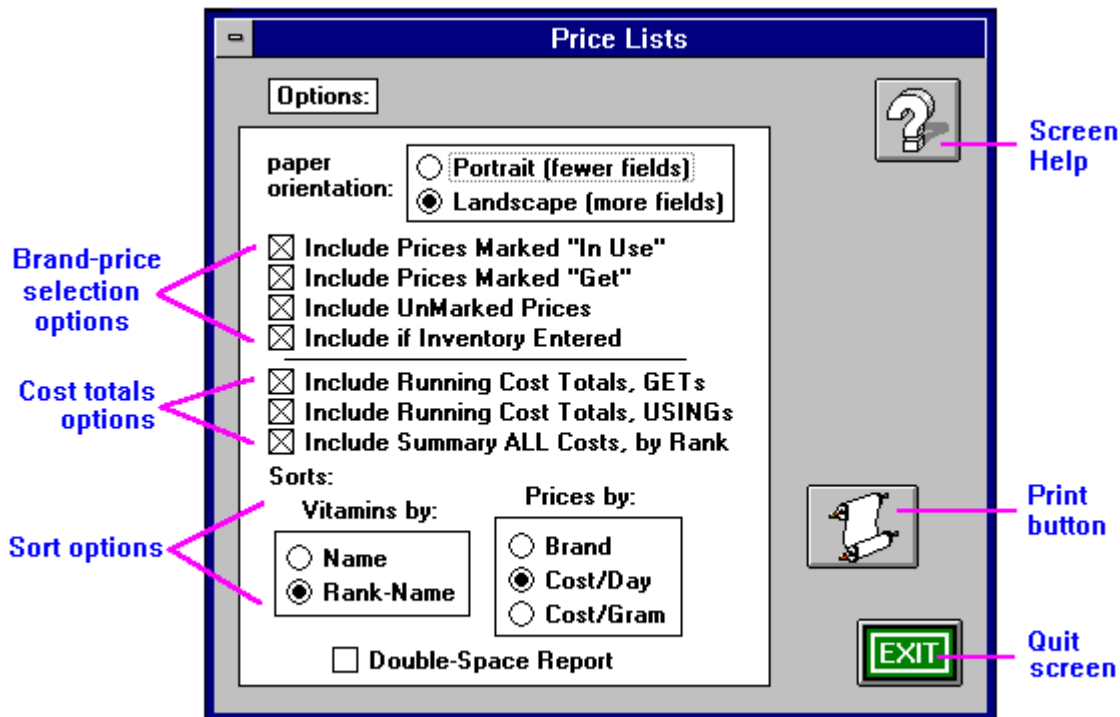
All of WhatPill's reports are formatted for the Window's Default Printer (whatever it may be). The Inventory Report has a page orientation of Landscape, which you can see in the lower-left corner above. Now, the only thing I want to point out to you is that if you should ever use this dialogue to select a different printer than the default, as soon as you do so the orientation will default to Portrait. You must remember, after choosing a different printer, to re-select Landscape as the Orientation! Else the report will print Portrait and the whole right half of it will be missing. Switching printers isn't something more than a few percent of you out there are going to be doing, and the only reports in WhatPill that'd you'd have this problem are the landscape reports (Inventory, one Price List report, and the data-entry form), but I like to cover all my bases. Click on **Cancel** from this screen to return to the page range option screen now, and from there, click on **OK** to send the Inventory report to your printer.

Study the Inventory Report now. This report has key identifying fields for each supplement listed as well as all of the inventory field information. By choosing the sort option of "Days to Go", we get all our supplements arranged in an order showing the ones that will need replenishing soonest first. The top supplement in this listing will be the lapsed Grape Seed Extract (note how the word "Extract" was dropped because there wasn't enough room for it in its column), which has a "Days to Go" figure of -6. Note that Garlic, which appeared on the In-Use Listing does not appear on this report -- the Inventory Report only lists supplements for which stock has been entered.

Definitely check out the other options for the report. The two extra sort options, "Source" and "Status", allow you to see your inventory grouped by supplier (very handy) and by type of inventory (similar to the alerts function -qv).

## Price Lists

We covered the two reports dealing with inventory first because they were simple. Now let's look at the Price Lists reports, which has more options. Go to the Reports menu and select "Price Lists". The below report options screen appears:



**Price Lists Options Screen**

This is the key report you want for going over price comparisons, but it's also useful for seeing key fields of data for people who only enter supplements they're currently taking into WhatPill.

This report has options on printing a "portrait" or a "landscape" page-orientated report. The landscape has more fields displayed (since it goes lengthwise across a page), and is the one you want to try out first. Have the options set as in the above screen shot. Print out the report. There's enough data in the sample data for 5 pages of output for this report, landscape, 4 pages portrait. While it's printing, you can read about the options:

**Brand-price selection options:** how you set these depends on exactly what questions you want the printed report to answer and how you're using WhatPill for your own needs. WhatPill got born from the need to do price-comparisons, and this is the report I coded first. So the selection options have options for including brand-prices flagged "Get", "In-use" (USING flag set), neither flagged, and if inventory has been entered. All of these come in real handy, and will be set differently, depending on what you want to look at. By the way, unless you've checked "Include Summary ALL Costs, by Rank", you must have at least one of these selection options checked or you will have nothing to report on.

There is a bit of redundancy possible in these four checkbox options. For example, if you have the first three checked, as in the above screen shot, you're going to get everything, and it doesn't matter whether the fourth ("Include if Inventory Entered") is checked or not. When you want to scan over all the brand-prices you've entered, considering their relative costs for making purchase decisions, you'll want to include everything. However, if you've already made your decisions about what to buy and have the GET flags set the way you want (this will all be gone over in detail in the tutorial dealing with Order Lists), you may only want to get a listing of the brand-prices marked GET (perhaps including "In-Use" too, to see the brand-prices you're switching from with your next purchase). Or you may only want a listing of just those brand-prices you have on the shelf, whether or not you're taking them at present or intend to buy them in the future, in which case you'd only have the fourth option checked.

- Include Running Cost Totals, GETs
- Include Running Cost Totals, USINGs — **Cost totals options**
- Include Summary ALL Costs, by Rank

**Cost totals options:** WhatPill will tally up your costs for those brand-prices with their GET or USING flags set in this report for you. Where she gives you these tallies is determined by which of these check options you've selected (if any -- you may not want to see any tallies). In the example that you're printing, you have all three set so you can compare the way they're done, but this is redundant since the 3rd option includes the information provided by the first two options (although in a different format). I prefer using just the 3rd option, as shown above, when I want to see costs at all.

For the first two options here, where the totals appear depends on how you have the Vitamins Sort option set. If you have it by Name, then the totals for either will appear only at the very end of the report, under the last brand-price listed, giving you a figure for all the brand-prices together. There will be no costs per rank breakdowns. However, if you have the Vitamins Sort option set to "Rank, Name", then you'll get subtotals by rank, giving you the running totals (accumulative for a rank and all higher ranks), and for the rank by itself, at the end of each rank.

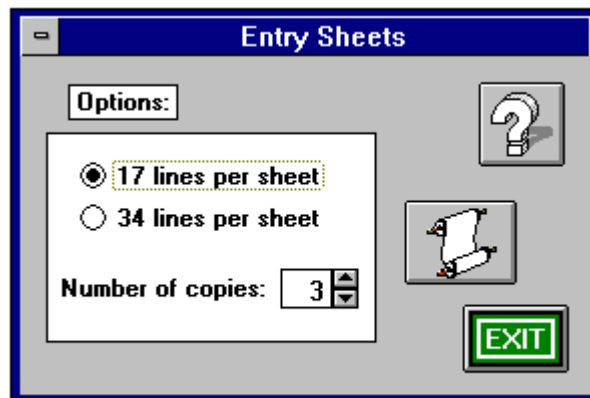
The third option is something very different: it will produce a kind of completely-independent report that is tacked on at the very end of the Price listing, having two cost summary breakdown tables, one for GET costs, and one for USING costs. It shows individual costs by rank, and accumulative or running costs, as well, but in a manner easier to look over, since it has all the costs and only the costs set down in one nice table for analysis. This third option will always report on both GET and USING costs, and it makes no difference how you have the Vitamin categories sorted.

You can see how both methods of cost reporting work on your sample printout -- look them over to see which you'll want to use in the future. Note that you can even have this third cost option checked and none of the 4 brand-price selection options checked. When you do this, WhatPill will only create the cost summary tables and not give you any price listings at all -- sometimes all you want is a printout of the cost tables.

## Entry Sheets

This isn't a report at all -- just a data entry form that's handy for when you visit retail stores to record their prices on for later entry into WhatPill. You'll find that while it's easy to enter into WhatPill price comparison data and while it's easy to collect this data from mail order sellers, it's not so easy with local retail stores. They don't give out price lists and are reluctant to give a bunch of quotes of their current prices over the phone. You have to do some leg work. Print out some of these forms before you go out to any store where you purchase medications and while you're there, take down their prices on supplements that you take.

Selecting "Brand-Price Entry Sheets" from the Reports menu, you'll find the options screen for this is extremely simple:



### Brand-Price Entry Sheets Options

Unless you have a small script and want to get a lot of prices onto one sheet, use the "17 lines per sheet" option. The "Number of copies:" can be set to a maximum of 99. Three's all you'll need at any one time, I think. Use the stepper controls or select the field with the mouse and type in whatever number of copies you desire. Print one out now and look it over: you'll see it has fields arranged in the same order as the brand-price entry screen, which facilitates entry off the sheet later.

End, tutorial 5