Patient Scheduler Reports
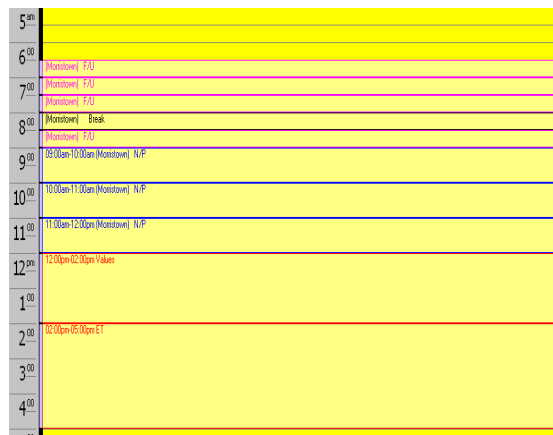## User Instruction

RESource

Reports

There are two available reports (printing options) in the scheduler: Tabular and Image. The tabular style generates a Word-type document, listing each appointment. The image style resembles exactly what you see when looking at the schedule in RESource.

Tabular

Image

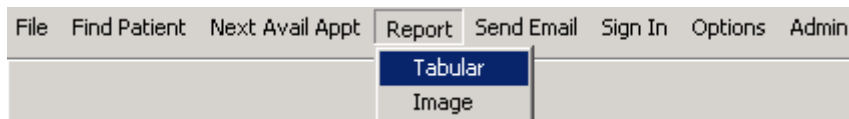**To print a tabular report:**

> 1 – select the calendar to be printed from the folder tree

> 2 – select Report – Tabular from the main menu. The Appointment Scheduler Report form will appear.

File   Find Patient   Next Avail Appt   Report   Send Email   Sign In   Options   Admin
                                                     Tabular
                                                     Image

Appointment Scheduler Report

Date Range
Begin Date: 04/20/2005
End Date: 04/20/2005

○ Day   ○ Week

☐ Only Scheduled

OK
Cancel

3 – select the desired date or date range you would like to print out (clicking ▾ will display a calendar allowing you to pick a date) – if you have a specific date selected in the schedule prior to selecting the Report option, this date will appear by default.

4 – you can choose to print either the Day or the Week by selecting the corresponding option. If you select Week, the Begin Date and End Date will adjust to display the date range for the given week. If you do not pick an option the system will simply print the date(s) entered.

5 – check off **Only Scheduled** if you want only the filled templated slots to appear in the printout. If this is not checked off then all appointment slots, whether a patient is scheduled in them or not, will print.
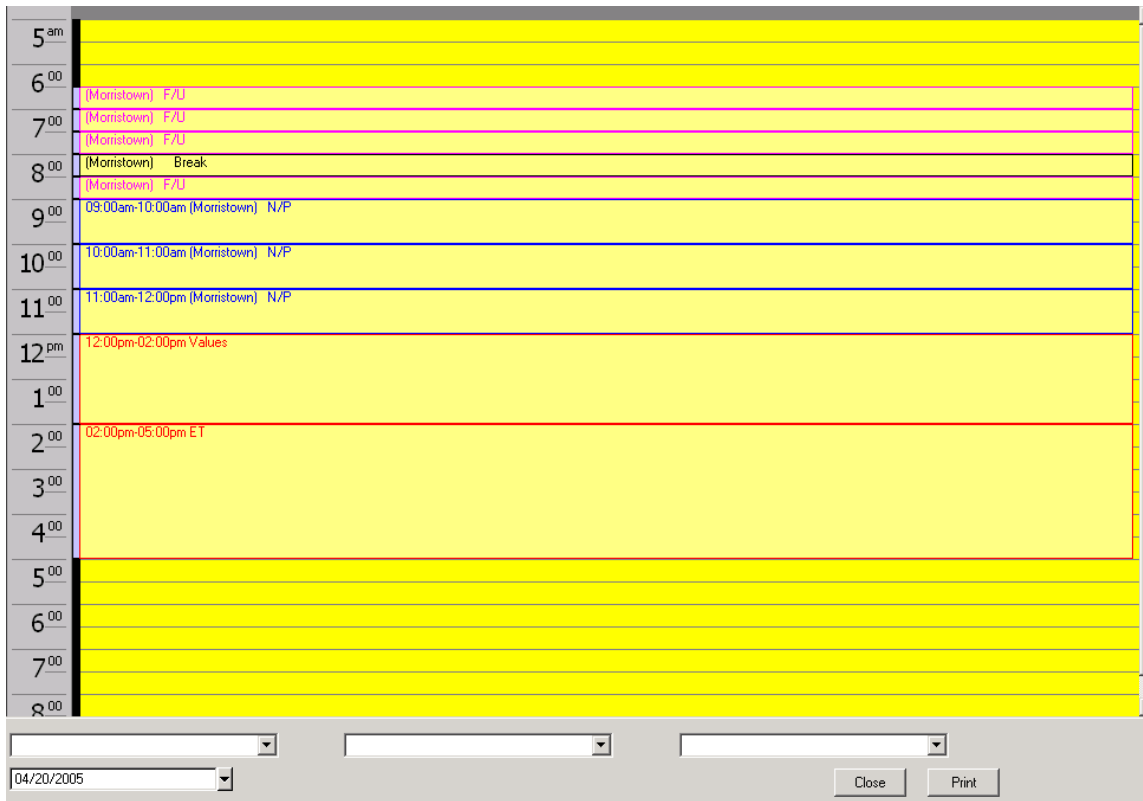
6 – click **OK** - the report will appear. To print, click the Print button in the upper left corner of the displayed report screen.

To print an image report:
   1 – select the calendar to be printed from the folder tree

    2 – select **Report – Image** from the main menu. The image view of the selected calendar will appear.
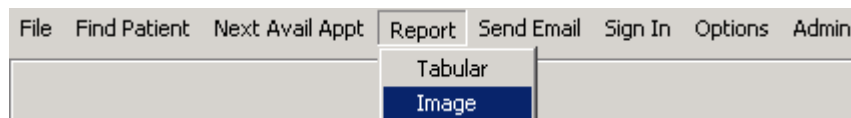
The date you had selected in the calendar prior to choosing the Report option will appear by default in the lower left corner. You can change this date if desired, but you cannot select a date range for this type of report.
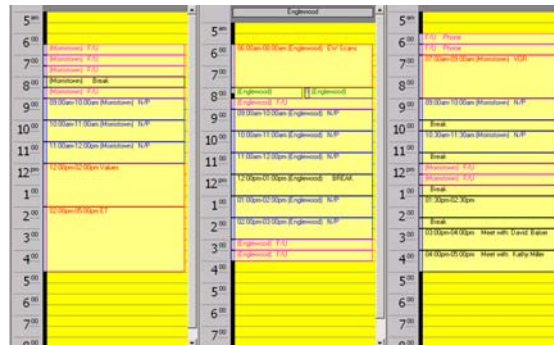
3 – you have the option to print up to three schedules on one page. If you want to print only the selected schedule, click **Print**. If you want to print two or three schedules, use the dropdowns provided and select each of the desired calendars – click **Print**.
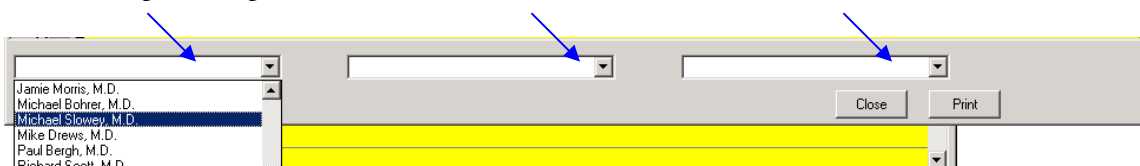
Two calendars selected:
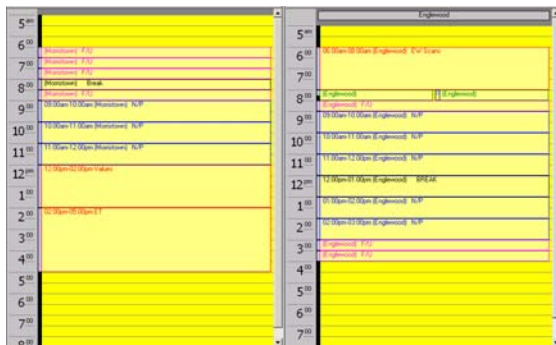

Three calendars selected:

Importing/Exporting

The calendars in the RESource Scheduler can be imported from and exported to Outlook. If a calendar currently exists in Outlook and it is needed in RESource you may choose to import it so you don't have to recreate the entire existing schedule. Or, if you want to synch a palm pilot with a schedule, for example, you could export the RESource schedule to Outlook and link from there (there is currently no mechanism to allow linking/synching to other devices within RESource).
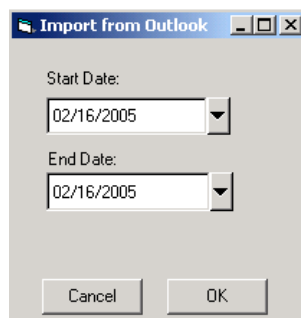
To Import a calendar:

      1 – if the calendar you want to import to does not already exist in RESource then it needs to be created and added to your folder tree. Make sure Outlook is open and that you have access to the calendar to be imported.

      2 - select the calendar to be imported to and select File – Import Outlook Calendar from the main menu (if this option is disabled/grayed out you do not have permissions to import calendars – see your RESource administrator if permissions are needed).
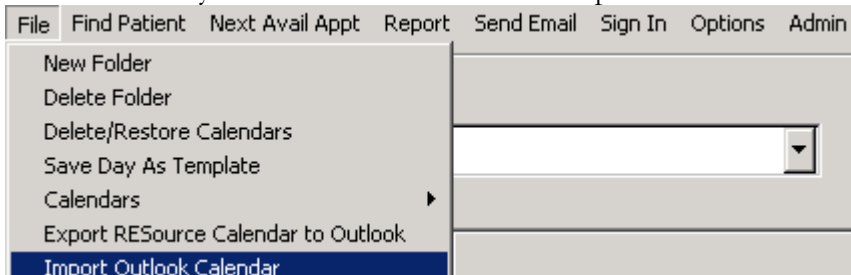
      3 – select the date range to be imported when the Import From Outlook date prompt appears. Click **OK**
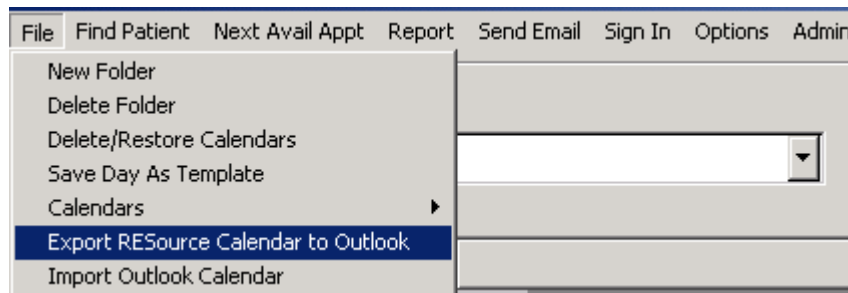

      4 – a Select Folder prompt will appear for Outlook. Select the Calendar to be imported and click **OK.**
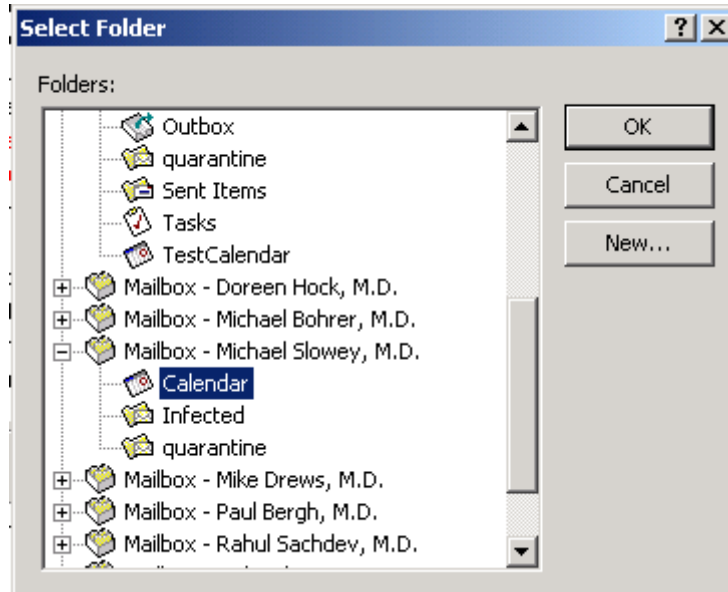
5 – a confirmation prompt will appear to confirm the calendar to import from and the calendar you are importing to. Click **OK.** RESource will import the scheduled items from Outlook, but you may need to assign appointment locations and template/appointment types.

To Export a calendar:
1 – select the calendar to be exported from your folder tree and select **File – Export RESource Calendar to Outlook**

2 - select the date range to be imported when the Import From Outlook date prompt appears. Click **OK**

3 – a Select Folder prompt will appear for Outlook. Select the Calendar to be exported to and click **OK.**

4 - a confirmation prompt will appear to confirm the calendar to export from and the calendar you are exporting to. Click **OK.**