



Save and reinstall custom reports

Prior to upgrading, custom reports within Centricity™ applications must be saved to backup file locations (either to local folders or to shared locations). Once the upgrade has occurred, these reports may then be reinstalled.

Use these procedures to locate and save custom reports to locations outside of application systems pre-upgrade and reinstall custom reports post-upgrade.



Failure to save custom reports to an alternate location before upgrading may in permanent loss of the reports.

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Centricity Practice Management reports

Prior to upgrading, identify custom reports within the **Practice Management** modules and the **Centricity Practice Solution Administration** module, save them to backup file locations and then reinstall these files.

Here are the Practice Management report procedures:

Save custom Practice Management reports

Reinstall custom Practice Management reports

Save custom Administration reports

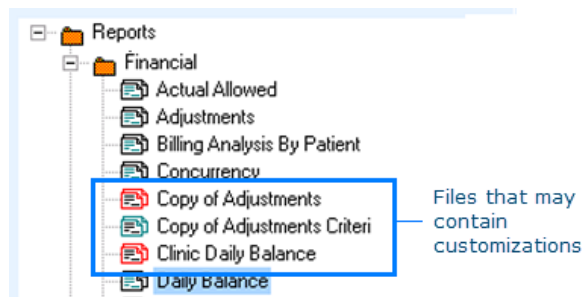
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Reinstall custom Administration reports (report files only)

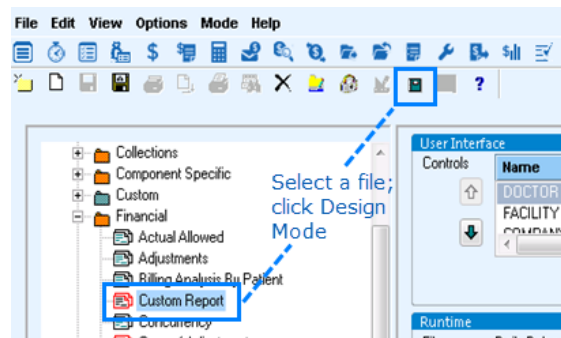
Save custom Practice Management reports

In Practice Management, access the **Reports** component to identify custom reports for reinstallation. Once identified, export these files as a report package.

1. In **Practice Management, Reports** component, open each folder and identify the following files:
 - **Red:** a file containing a custom report (copied or imported).
 - **Green:** a new file created by a user that may contain custom criteria.



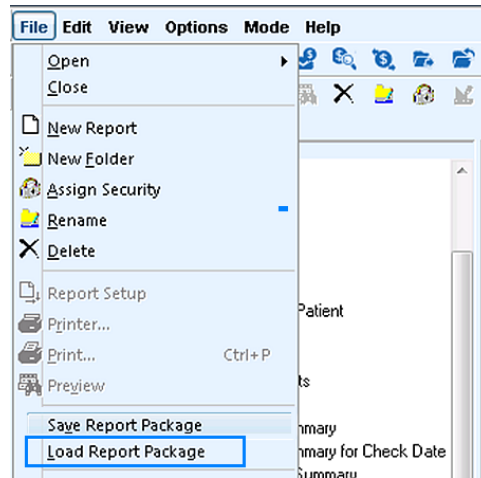
2. For red files, verify that reports are custom reports and not copies of system reports. For green files, determine whether the content includes customizations to be saved.
3. Select the files to save. In the toolbar, select **Design Mode**.



4. In **Design Mode**, select **File > Save Report Package** and enter a file location (a local folder or shared drive). Click **Save**.

Reinstall custom Practice Management reports

1. Open **Practice Management** and select **Reports**.
2. In **Reports**, select **File > Load Report Package**. The report loads immediately.

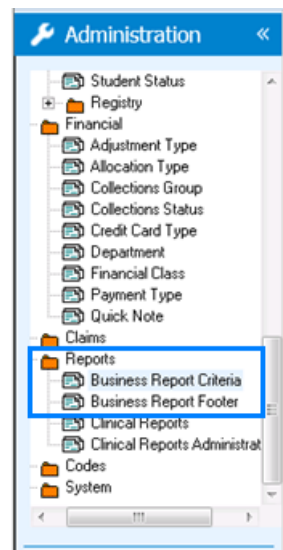


3. Right-click the report and select **Assign Security**.
4. Select the user groups or users that may access the report. Click **OK** to apply.

Save custom Administration reports

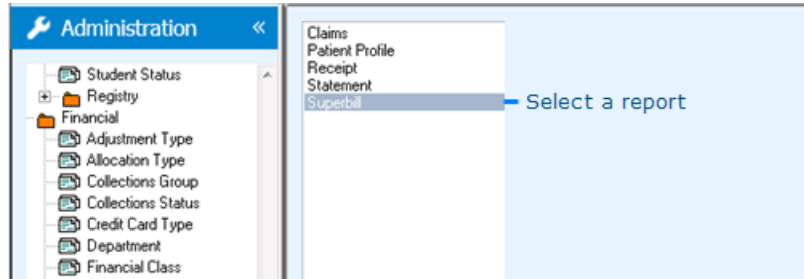
To save Centricity Practice Solution **Administration** reports, any custom reports (.rpt files) and supporting stored procedures (.sql files) must be exported to a location outside of the SQL Server Management Studio database.

1. Open Centricity Practice Solution **Administration**.

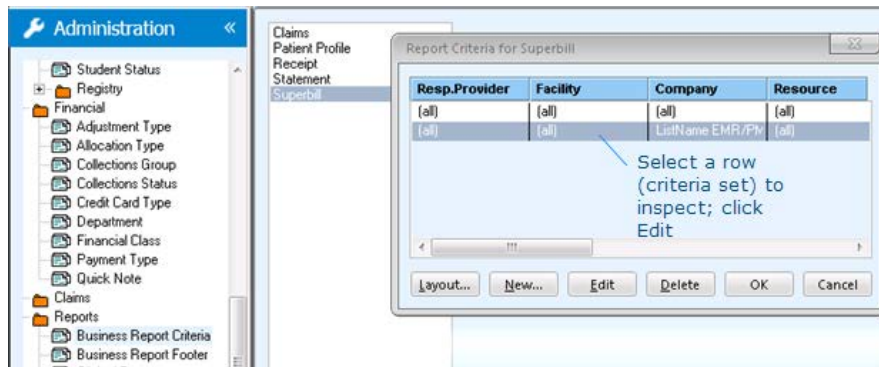


2. Open **Reports > Business Report Criteria**.

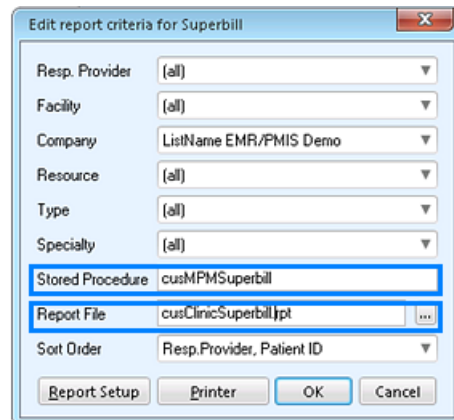
3. In the report list (right pane), select a report to inspect.



4. In **Report Criteria**, select a row to inspect for custom files. Click **Edit**.



5. Use **Edit Report Criteria**, view **Stored Procedure** and **Report File** fields to identify custom files (most custom file names begin with a **cus** prefix).



If custom files exist, note the following:

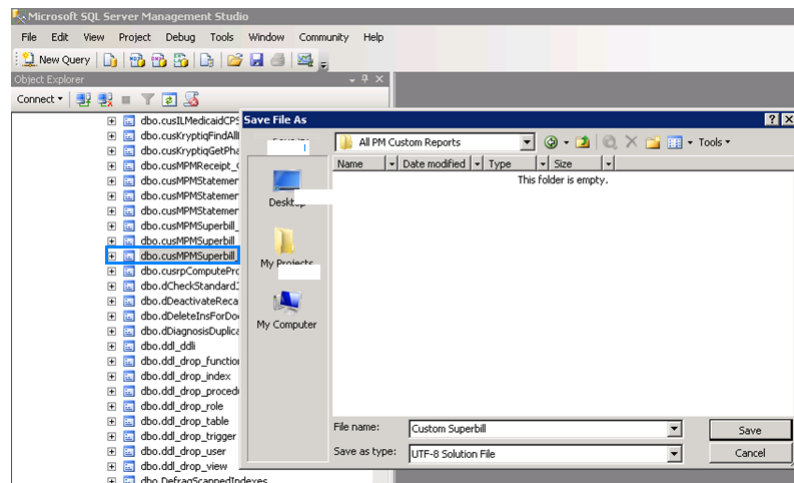
- The stored procedure name.
- The report file name.

This information is used during the reinstallation process to ensure that files are correctly reinstated.



If you are unsure whether a file is a custom file, contact your administrator for support.

6. In **Report Criteria**, select the remaining rows and then click **Edit** to inspect each for custom files.
7. In the reports view, select the remaining reports to inspect for custom files. Repeat steps three through six of this procedure for each report until all reports are inspected.
8. In **Administration > Reports**, inspect each of the remaining reports. Repeat steps three through six for each until all custom file information is gathered.
9. In **SQL Server Management Studio**, navigate to <database name>/Programmability/Stored Procedures.
10. Using the list of custom files detected, select a stored procedure to save. Select **File > Save As**. Navigate to a shared drive location and click **Save**.



Reinstall custom Administration reports (report files and stored procedures)

1. In **SQL Server Management Studio**, ensure that the correct database is selected.
2. Select **File > Open > File**. Navigate to the stored procedure file (.sql file) previously saved to shared location on your network. Select the stored procedure to reinstall.
3. In the toolbar, select **Execute** to add the stored procedure to the database. This generates a new file for the stored procedure on the server and includes the content of that procedure. Take note of the name generated for the added .sql file.
4. In Centricity Practice Solution **Administration**, expand the **Reports** folder and select **Business Report Criteria**.
5. In the reports view, select the report associated with the custom files.
6. In **Report Criteria**, select the criteria set (row) with the custom report file to associate.
7. In **Edit Report Criteria > Stored Procedure**, change the current procedure name listed to that of the new stored procedure name generated upon import.
8. In **Report File**, enter the path to the custom report file (.rpt). This must be a shared drive location that all users may access. Click **OK** to save edits. Click **OK** to save the report criteria.
9. Repeat steps one through eight for each custom report and stored procedure set requiring reinstallation.

Reinstall custom Administration reports (report files only)

In some cases, only report file (.rpt file) installation is required. Use the following to install Administration reports that do not have corresponding stored procedures (.sql files).

1. In Centricity Practice Solution **Administration**, expand the **Reports** folder and select **Business Report Criteria**.
2. In the reports view, select the report associated with the custom report.
3. In **Report Criteria**, select the criteria set (row) associated with the custom report.
4. In **Edit Report Criteria > Report File**, enter the path to the custom report file (.rpt). This must be a shared drive location that all users can access. Click **OK** to save edits. Click **OK** to save the report criteria.
5. Repeat steps one through four for each custom report requiring reinstallation.

Centricity Practice Solution reports

Prior to upgrading, identify custom reports within Centricity Practice Solution, save them to backup file locations and then reinstall these files.

Here are the Centricity Practice Solution report procedures:

Save custom Centricity Practice Solution EMR reports

Export a clinical kit from Centricity Practice Solution Chart Reports

Reinstall custom Centricity Practice Solution EMR reports

Save custom Centricity Practice Solution EMR reports

Access the CPS client's **cwrprts** folder to identify custom Centricity Practice Solution EMR reports to be exported from within the Charts module.

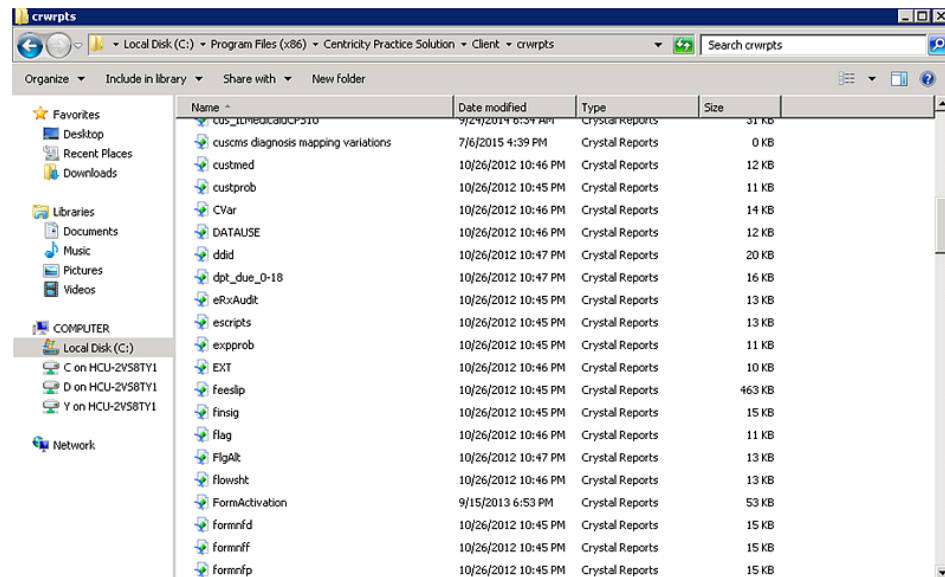


Centricity Practice Solution includes an option for centralized deployment, which means that some reports may reside in a shared network folder. Verify that backup copies of custom reports are saved for reinstallation. If you are unsure whether you have custom reports on a shared network folder, contact your administrator for assistance.



Custom EMR reports are not commonly overwritten during upgrades but can be saved to an alternate location as an added precaution.

1. Navigate to the Centricity Practice Solution client's **cwrprts** folder on your machine. A common path is `C:\Program Files (x86)\Centricity Practice Solution\Client\cwrprts`.



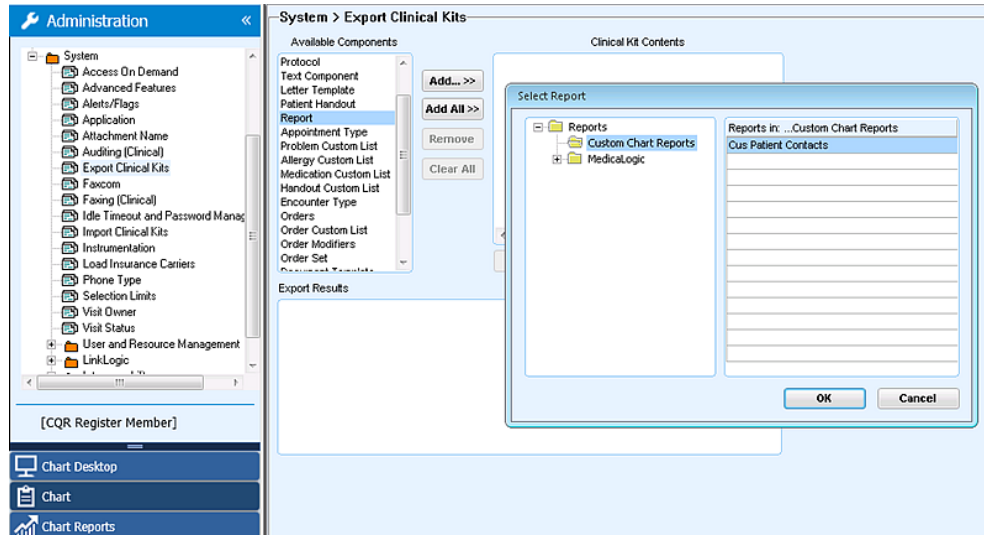
2. Sort the content in **cwrprts** by date modified. Review recently modified reports to identify custom reports (.rpt files).
3. Copy any custom .rpt files located in the **cwrprts** folder to a local or shared file location in the event they are needed for reinstallation after upgrade.

Export a clinical kit from Centricity Practice Solution Chart Reports

1. In Centricity Practice Solution **Administration**, select **Reports > Clinical Reports**.
2. Review the folders containing your custom reports. Identify the custom reports you need to export.



Custom EMR reports are not commonly overwritten during upgrades but can be saved to an alternate location as an added precaution.



3. In Centricity Practice Solution **Administration**, select **System > Export Clinical Kits**.
4. In **Export Clinical Kits > Available Components**, select **Report** and click **Add**.
5. In **Select Report**, navigate to and select a report to include in the clinical kit. Click **OK**.
6. Repeat step five until all custom reports have been selected for inclusion in the clinical kit.
7. Once all reports are added, **Clinical Kit Contents** lists the reports that have been selected for inclusion within the clinical kit.
8. Click **Export Clinical Kit** to save the selected custom reports in a clinical kit that can be reinstalled as needed.

Reinstall custom Centricity Practice Solution EMR reports

1. In Centricity Practice Solution **Administration**, expand the **System** folder. Select **Import Clinical Kits**.
2. Select **Import Clinical Kit** and navigate to the location on your computer or the network location where the clinical kit is located.
3. Select the **.ckt** file (the clinical kit file) to import. Click **Open** to import and reinstall the custom reports from the kit.

Save and reinstall custom EMR (Oracle) reports

Prior to upgrading, identify custom reports within Centricity EMR, save them to backup file locations and then reinstall these files.

Here are the Centricity EMR report procedures:

Save custom EMR reports from crwrpts

Save custom EMR reports from Reports (export a clinical kit)

Reinstall custom CEMR reports (import a clinical kit)

Access the Centricity EMR **crwrpts** folder on your machine to identify custom CEMR reports to be exported.



Centricity EMR includes an option for centralized deployment, which means that some reports may reside in a shared network folder. Verify that backup copies of custom reports are saved for reinstallation. If you are unsure whether you have custom reports on a shared network folder, contact your administrator for assistance.



Custom EMR reports are not commonly overwritten during upgrades but can be saved to an alternate location as an added precaution.

Save custom EMR reports from crwrpts

1. Navigate to the Centricity EMR **crwrpts** folder on your machine. A common path is
C:\Program Files (x86)\Centricity EMR\crwrpts.
2. Sort the content in **crwrpts** by **date modified**. Review recently modified reports to identify custom reports (.rpt files).
3. Copy any custom **.rpt** files located in the **crwrpts** folder to a local or shared file location in the event they are needed for reinstallation after upgrade.

Save custom EMR reports from Reports (export a clinical kit)

1. In Centricity EMR, select **Go > Setup** and select the **Settings** tab.
2. In the **Settings** folder view, expand the **System** folder and select **Export Clinical Kits**.
3. In **Export Clinical Kits > Available Components**, select **Report** and click **Add**.
4. In **Select Report**, navigate to and select a report to include in the clinical kit. Click **OK**.
5. Repeat steps three and four until all custom reports have been selected for inclusion in the clinical kit.
When this is complete, the clinical kit contents area lists all reports that have been selected for inclusion in the clinical kit.
6. Click **Export Clinical Kit** to save the selected custom reports for reinstallation as needed.



Groups of custom reports can also be saved within multiple clinical kits to allow for the reimporting of individual reports as needed.

Reinstall custom CEMR reports (import a clinical kit)

1. In **CEMR**, select **Go > Setup** and select the **Settings** tab.
2. In the **Settings** folder view, expand the **System** folder and select **Import Clinical Kits**.
3. Select **Import Clinical Kit**. Navigate to the clinical kit location (a local folder or network location).
4. Select the **.ckt** file (the clinical kit file) to import and click **Open** to import and reinstall the custom reports from the kit.