CVB Inspection and Compliance Procedure for Generating Case Summaries from PvWorks System

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Notes:
CVB Inspection and Compliance Procedure for Generating Case Summaries from PV Works System

Background: The purpose of this work instruction is to generate a PDF summary report of selected cases. This report may be used in response to FOIA requests as well as for other purposes.

This is a two-step process:

1) Select cases to be reported
2) Create report

1. Select cases to be reported

To run the batch printing report, first find the cases you want to print.

To do this, use the ‘Find Cases’ functionality in the top left hand corner of the Grid (i.e., via the find binoculars button),

then select the ‘Build a Query option’ from the submenu;
Build a Query

Enter your Query details. For example: all cases received from 1 January 2004 to present for rabies product. This requires three query elements as follows:
Click the Show Matches button to display a list of selected cases.
The first column of this list defines the cases that will be reported. By default no cases are selected, leaving the user with the option to include all selected cases or some of them in the report. Selected rows are indicated with a check mark.

To select all of the cases in the list, click the Mark All button. Note that after clicking this button every row will have a check mark in the first column. This global selection can be reversed by clicking the Unmark All button which appears after the Mark All button has been used.

Alternatively, click the box in each row of the case(s) that should be reported. It is possible to use both techniques together, e.g., Mark All and then uncheck some cases.

Once all cases to be reported have been checked, generate the report.

2. Create Report

Click on the <Report> button

Choose Crystal Reports – External Case Summary Reports
Run report by clicking the run button. This will display a report parameter screen.

In the parameter screen – select ‘Last Find Case Query’ from the drop down list “run in single case or PSUR Mode”. Optionally you can determine whether or not assessment information and reporter details should be included in each case summary. To include these, check the appropriate optional boxes. For FOIA requests both of these should be checked; the FOIA office will redact as necessary.
Click the run button to create the report. This will be displayed on the screen. Note that the execution time may be considerable if many cases are included.
Click the PDF button to save this report as a PDF file.