



COLLEGE of AMERICAN  
PATHOLOGISTS  
Laboratory Quality Solutions

# Direct Transmission of PT Results

*User Guide, Part 2 of 3*

**Sunquest Reports Installation**



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# INTRODUCTION

## What are the PT Extract and Test Compendium Reports?

### PT Extract Report

The PT extract report is a report query that has been developed to aggregate the collection of PT data elements from the LIS, format them to CAP-specific guidelines, and place the output (PT results file) in your laboratory's designated pickup folder, where it can be picked up and transferred to the direct transmission CAP PT hub. The report is intended to be integrated within the LIS making it accessible like other reports in your LIS.

### Test Compendium Report

For some LISs, a second report query is available that can aggregate the complete list of tests that your laboratory performs, including your laboratory's test codes, description, unit of measure (UOM), and specimen type. This report, called a test compendium report, will be saved to a temporary location on your computer.

This list of tests may be useful for the mapping process that needs to be completed within the hub. During the process:

You will need to map your laboratory's...	To the...
LIS Test Description	CAP Test Description
LIS Test Code	CAP Test Code
LIS Test Unit of Measure	CAP Test Unit of Measure
LIS Test Specimen Type	CAP Test Specimen Type

There are several methods available to complete the mapping process. With some of the methods, your laboratory may find it helpful to utilize part or all of your laboratory's test compendium, since the hub allows you to upload/import to simplify the test mapping process. Only quantitative tests and direct transmission enabled programs need to be mapped.



## Report Setup in Sunquest: An Overview

Sunquest has partnered with the CAP to provide support for the report and direct transmission, which is covered under your current maintenance/support agreement. Sunquest is prepared to:

- Make the extract report available and the test compendium report in your report libraries
- Modify the report to accommodate LIS updates/upgrades
- Address any setup configuration issues
- Resolve report issues

The table below provides an overview of the setup process for the extract and test compendium reports.

### PT Extract Report

1

Install the extract report and modify the query (as needed) to point to the appropriate network folder location (agent pickup location).

2

Make the report accessible to the user by modifying security and adding the report to the LIS report menu.

3

Perform testing to ensure a file is extracted to the appropriate network folder location (agent pickup location).

### Test Compendium Report

1

Install the test compendium report.

2

Make the report accessible to the user by modifying security and adding the report to the LIS report menu.



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# INSTALLING THE EXTRACT AND TEST COMPENDIUM REPORTS

## Overview

The CAP customer support team will provide you with the “Test Compendium.rpt” report document via email that you must import into Sunquest and add to your menu.

Sunquest will provide the extract reports as, “CAP Ad Hoc,” integrated into the Crystal Reports developed in Business Objects. The extension of the reports is, “.rpt”. The reports will be made available in the Central Management Console.

The report configuration process involves several processes, described in detail later in this document:

1. Locating the CAP ad hoc reports
2. Verifying your ODBC settings
3. Setting up the reports
4. Running the CAP reports



# Locating the CAP Ad Hoc Reports

## Step Instructions

1 Access SUN Libraries and click Adhoc.

The screenshot shows the Sunquest web interface. At the top, there is a search bar and a navigation menu with tabs: Home, Community, Cases, Knowledge, Assets, Ideas, **Libraries** (highlighted with a red box), and Events. Below the navigation, there is a 'Content Search' section with a dropdown menu set to 'All Libraries' and a search button. To the left, there is a 'Recent Items' section showing 'South RUG conference NOV2019' and 'RUG - South', and a 'Recycle Bin' icon. The main content area is titled 'Libraries Overview' and includes a 'Back' link, 'Contribute' and 'Create New...' buttons, and a note: 'Use the tabs below to view and manage shared libraries or your private library.' Below this, there are tabs for 'Shared Content' and 'My Private Files'. The 'My Libraries' section contains a list of libraries with columns for 'Actions' and 'Library Name'. The libraries listed include: 'Library Membership & Publishing Requests', 'BCP Downtime Procedures', 'BETA Sunquest Admin Tools', 'BETA Sunquest Clinical Financial 6.4', 'BETA Sunquest Radiology 5.4', 'Client and Product Safety Notifications', 'Client Hardware Configurations', 'Client Hardware Evaluations', 'Client Success Stories', and 'Competitive Strategies'. On the right side, there is a 'Popular Tags' section with a dropdown menu set to 'Sort By Popularity'. The tags listed include: 'Ad Hoc' (highlighted with a red box), 'ADR', 'Application Interfacing', 'Blood Bank', 'Client Test Procedure', 'Clinical Financial', 'CN', 'Collection Manager', 'Commercial Lab', 'CoPathPlus', 'Engage', 'Feature Highlights', 'File Specifications', 'FlexiLab', 'GA Letter', 'General Testing Guidelines', 'Installation Guide', 'Instrument Interfacing', 'Instrument Manager (SIM)', 'Known Issues', 'Laboratory Plan', 'PowerPath', 'PSN', 'Radiology', 'Release Notes', 'Sales Tool', 'SUG Presentations', 'Sunquest Application Mana...', 'Transfusion Manager', and 'User Documentation'. Below the tags, there is a 'Recent Activity' section showing three items: 'Ricky Triana featured content Sunquest-Molecular Diagnostics - How to Start - Scale Genetics Testing 10102017 in Marketing Collateral 2020 22 hours ago', 'Ricky Triana published Sunquest-Molecular Diagnostics - How to Start - Scale Genetics Testing 10102017 into Marketing Collateral 2020 22 hours ago', and 'Sylvia Romero subscribed to Client Test Plan NCSR Interface PowerPath 10.3 in SQ PowerPath 22 hours ago'.



## Step Instructions

2 Type "CAP" into the search box and click **Go!**

The screenshot shows the Sunquest web application interface. At the top, there is a search bar with the text "Search..." and a "Search" button. Below the search bar is a navigation menu with links for Home, Community, Cases, Knowledge, Assets, Ideas, Libraries, and Events. The main content area is titled "Search for Content" and includes a search box with the text "CAP" entered. The search results are displayed in a table with columns for Title, Size, Author, and Last Modified. The results include files such as CAPAPT-LAB-v1.0, CAPAPT-CSQLLAB-v1.0, CAPAPT-TEST-v1.0, Sunquest CAP Report documentation, and Crystal Reports 2016 Installation for AdHoc Workstations.

**Search Results:** Showing 1-20 of 100 results

<input type="checkbox"/>	Title	Size	Author	Last Modified
<input type="checkbox"/>	CAPAPT-LAB-v1.0	82 KB	Rick Haase	57 minutes ago
<input type="checkbox"/>	CAPAPT-CSQLLAB-v1.0	77 KB	Rick Haase	57 minutes ago
<input type="checkbox"/>	CAPAPT-TEST-v1.0	78 KB	Rick Haase	58 minutes ago
<input type="checkbox"/>	Sunquest CAP Report documentation	510 KB	Rick Haase	1 hour ago
<input type="checkbox"/>	Crystal Reports 2016 Installation for AdHoc Workstations	38 KB	Scott Hawkins	5/22/2019



## Step Instructions

3 Sort by Last modified and choose the report and documentation files.

The screenshot shows the Sunquest search interface. The search criteria are set to 'CAP'. The search results are sorted by 'Last Modified'. A red box highlights the following four items:

Title	Size	Author	Last Modified
CAPAPT-LAB-v1.0	82 KB	Rick Haase	59 minutes ago
CAPAPT-CSQLLAB-v1.0	77 KB	Rick Haase	59 minutes ago
CAPAPT-TEST-v1.0	78 KB	Rick Haase	1 hour ago
Sunquest CAP Report documentation	510 KB	Rick Haase	1 hour ago

- **CAPAPT-LAB-v1.0** – This is the PTresult submission extract report.
  - Use this report if you are on Sunquest Laboratory version 7.2 and later.
- **CAPAPT-CSQLLAB-v1.0** – This is an alternate PT result submission extract report.
  - Use this report if you are on Sunquest Laboratory version 7.1 and prior.
- **CAPAPT-TEST-v1.0** – This is the “test” PT result submission extract report.
  - This is a CAP report to run against the TEST environment.
- **Sunquest CAP Report documentation** – This is another guide that can be utilized for the configuration and setup of the PT reports.





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### Process for Requesting Sunquest Support (if needed)

If you need help locating the reports, you may contact Sunquest for technical support through your current processes by:



**Phone** – Call the Sunquest support hotline.



**Web** – Logging into the Sunquest User Network (SUN) and creating a support ticket



**Live Chat** – Launching a “Live Chat” communication

A support analyst will work with you to gather the necessary information to resolve the case. If the case proves to require additional expertise, it may be assigned to a support specialist.

Ensure to communicate and document, “New Installation of CAP Adhoc report,” or, “CAP Adhoc report support”.

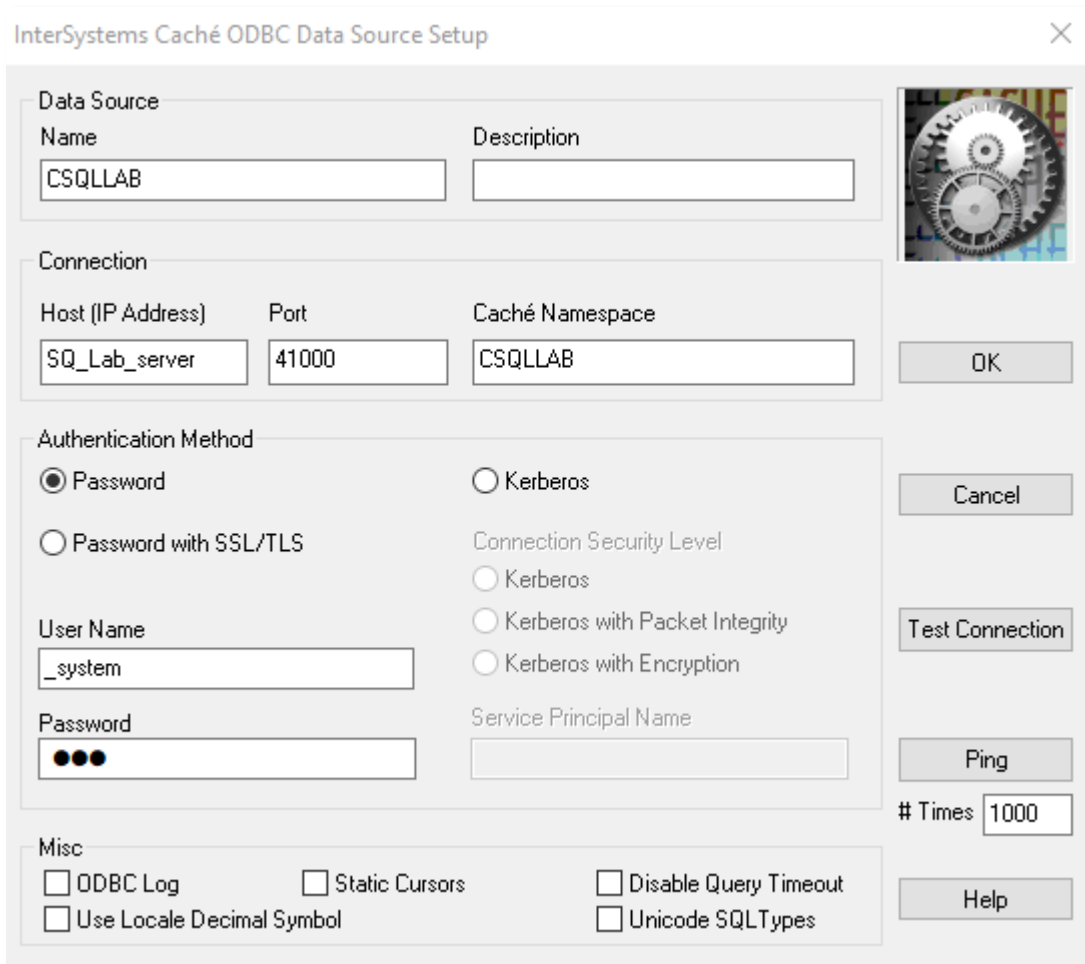
*Note:* You may need to advise the Sunquest support team of the network folder path for the pickup folders. (Your IT/IS team will be able to provide this information.)

## Verifying Your ODBC Settings

Verify your ODBC settings on the machine that is running the reports, usually the ADHOC server.

For the CAPAPT-CSQLLAB and CAPAPT-LAB reports, these should already be setup and working correctly for production reports.

### Version 7.1 and below:



InterSystems Caché ODBC Data Source Setup

**Data Source**

Name: CSQLLAB      Description:

**Connection**

Host (IP Address): SQ\_Lab\_server      Port: 41000      Caché Namespace: CSQLLAB

**Authentication Method**

Password       Kerberos

Password with SSL/TLS

Connection Security Level

Kerberos

Kerberos with Packet Integrity

Kerberos with Encryption

User Name: \_system

Password: ●●●

Service Principal Name:

**Misc**

ODBC Log       Static Cursors       Disable Query Timeout

Use Locale Decimal Symbol       Unicode SQLTypes

Buttons: OK, Cancel, Test Connection, Ping, # Times: 1000, Help



InterSystems Caché ODBC Data Source Setup

Data Source

Name	Description
TEST	

Connection

Host (IP Address)	Port	Caché Namespace
SQ_Lab_server	41000	CSQLLABTEST

Authentication Method

Password       Kerberos

Password with SSL/TLS      Connection Security Level

Kerberos

Kerberos with Packet Integrity

Kerberos with Encryption

User Name:

Password:

Service Principal Name:

Misc

ODBC Log       Static Cursors       Disable Query Timeout

Use Locale Decimal Symbol       Unicode SQLTypes

OK      Cancel      Test Connection      Ping      # Times:       Help



**Version 7.2 and later:**

InterSystems Caché ODBC Data Source Setup

Data Source

Name	Description
LAB	

Connection

Host (IP Address)	Port	Caché Namespace
SQ_Lab_server	41000	LAB

Authentication Method

Password       Kerberos

Password with SSL/TLS

Connection Security Level

Kerberos

Kerberos with Packet Integrity

Kerberos with Encryption

User Name:

Password:

Service Principal Name:

Misc

ODBC Log       Static Cursors       Disable Query Timeout

Use Locale Decimal Symbol       Unicode SQLTypes

Buttons: OK, Cancel, Test Connection, Ping, Help

# Times:

Note that the Namespace might be **LABA/LABB/etc** instead of **LAB**.



InterSystems Caché ODBC Data Source Setup

Data Source	
Name	Description
TEST	

Connection		
Host (IP Address)	Port	Caché Namespace
SQ_Lab_server	41000	TEST72

Authentication Method

Password       Kerberos

Password with SSL/TLS      Connection Security Level

Kerberos

Kerberos with Packet Integrity

Kerberos with Encryption

User Name:

Password:

Service Principal Name:

Misc

ODBC Log       Static Cursors       Disable Query Timeout

Use Locale Decimal Symbol       Unicode SQLTypes

Buttons: OK, Cancel, Test Connection, Ping, # Times: 1000, Help

If you are on v7.2 or later, it can be just about anything, but it will usually be something like **TEST72/TEST73/TEST80/TEST81/etc.**



## Setting Up the Reports

Step	Instructions
1	<p>Log in to the Business Objects Business Intelligence (BOBI) system via a web browser. It can be accessed via a URL that has the following naming convention (you will have to enter the details appropriate for your laboratory):</p> <p><a href="http://{ADHOC_server}:8080/BOE/CMC">http://{ADHOC_server}:8080/BOE/CMC</a></p> <p>Example:</p> <p><a href="http://GSHNTINFO02:8080/BOE/CMC">http://GSHNTINFO02:8080/BOE/CMC</a></p> <p>If you can't reach this through a web browser, you can remote desktop protocol (RDP) into your ADHOC server and access the graphical user interface (GUI) via the following URL:</p> <p><a href="http://127.0.0.1:8080/BOE/CMC">http://127.0.0.1:8080/BOE/CMC</a></p>



## Step Instructions

2 The following screen will display:

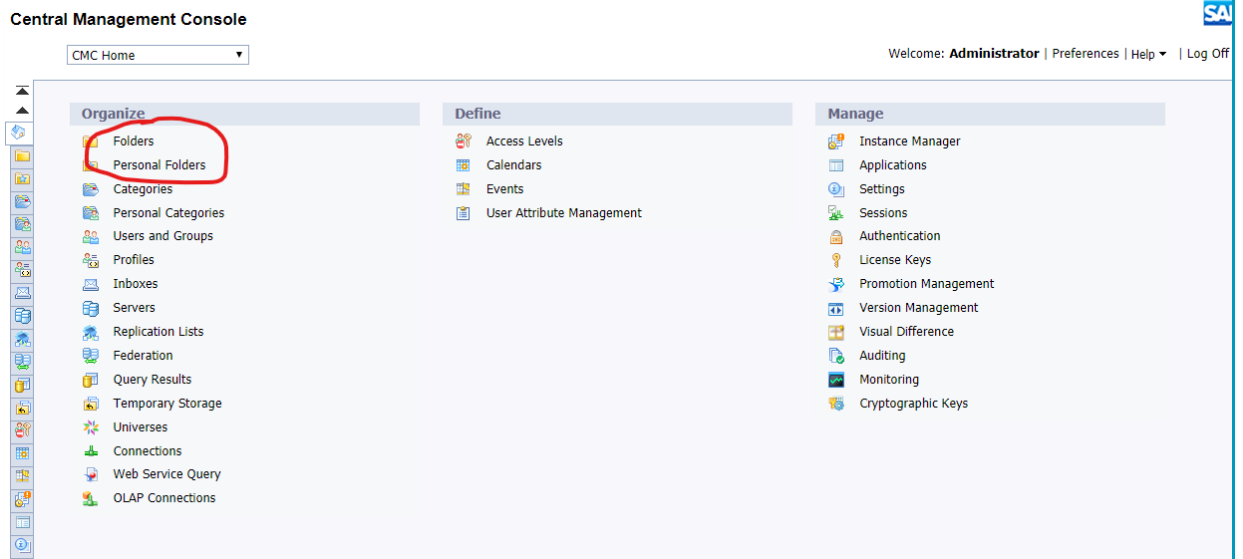
The screenshot shows the SAP login interface. At the top right is the SAP logo. Below it, the title "Log On to the Central Management Console" is displayed, with a "Help" link to its right. A horizontal line separates the header from the main content area. Below the line, the text reads: "Enter your user information and click Log On. (If you are unsure of your account information, contact your system administrator.)". A light gray box contains the login fields: "System:" with the value "GHSGNTINFO02:6400", "User Name:" with the value "administrator", "Password:" with masked characters "\*\*\*\*\*", and "Authentication:" with a dropdown menu set to "Enterprise". Below the gray box is a blue "Log On" button.

Log in using a valid account. It doesn't have to be the administrator account, but this report must be run under a user account that has permissions to upload and schedule reports. (See the BOBI Administrator and Sunquest user guide for further details).

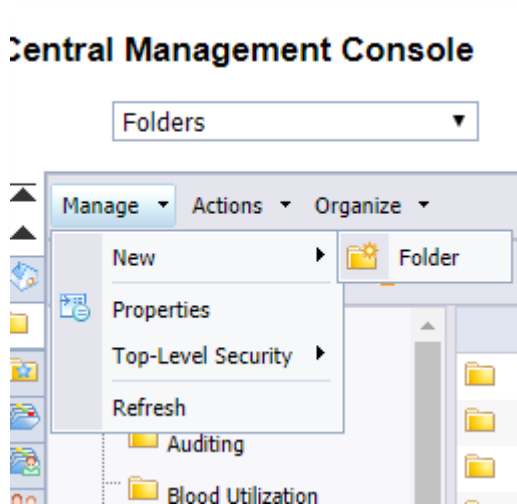


## Step Instructions

- 3 Once logged in, chose a location for the report(s). You can place them under “Folders” or “Personal Folders”.



In this example, we've chosen “Folders” and created a subfolder called, “CAP Report”. To create a subfolder, navigate to Manage > New > Folder in the top left corner.



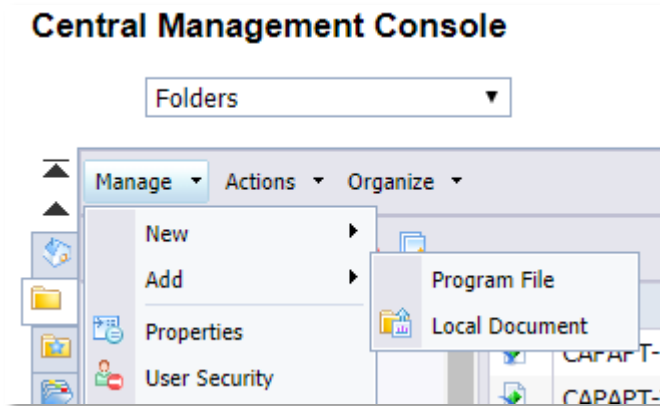
Once the folder is created, click the new folder name in the list.





## Step Instructions

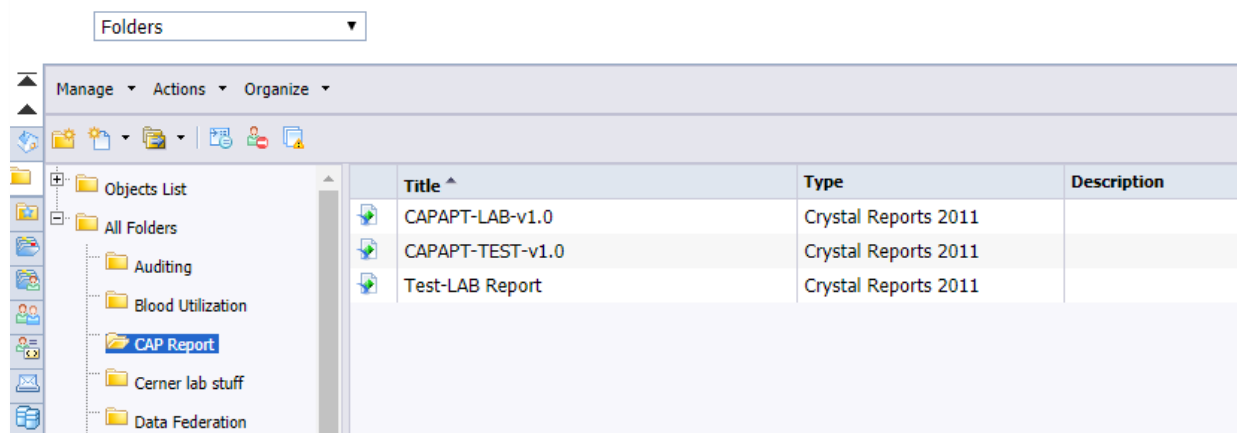
- 4** Add the report(s). Click **Manage** in the top left corner again, and then “**Add/> Local Document**”:



- 5** Click **Choose File** and browse to the CAP report you'd like to add (**CAPAPT-LAB** or **CAPAPT-CSQLLAB** depending on your Sunquest laboratory version). Once you select the report, click **Add** in the bottom right corner.

Optional: Repeat this step and add the CAPAPT-TEST report (if you wish to run the CAP report against your TEST data) and the Test-LAB Report/Test-CSQLLAB Report (recommended to test that a report can output to a network share successfully).

### Central Management Console





## Running the CAP Reports

Step	Instructions
1	Double-click the CAP report you want to run; for example, LAB/CSQLLAB (it's recommended to follow this process for each CAP report you added, eg, if you decided to also add the TEST report).
2	Expand <b>Default Settings</b> on the left. <i>Note:</i> Default settings allows us to set up defaults for the report so you don't have to enter the same information every time you run the report( eg, Formats and Destination).



## Step Instructions

### 3 Click **Formats**.

Ensure **Separated Values (CSV)** is selected and the following settings are set:

**Delimiter:** blank

**Separator:** | (pipe)

**Mode:** Standard

**Report and page sections:** Export (Ensure "Isolate report/page sections is checked.)

**Group sections:** Do not export

**Default Settings: CAPAPT-LAB-v1.0**

Hide Navigation

- ▼ Default Settings
  - Recurrence
  - Schedule For
  - Notification
  - Database Configura
  - Prompts
  - Filters
  - Formats**
  - Destinations
  - Print Settings
  - Events
  - Scheduling Server C
  - Viewing Server Gro
  - Extensions
  - Thumbnail
  - Languages
- Properties
- Categories
- Schedule
- User Security
- Limits

**Formats**

**Format Options for Selected Document:**

Separated Values (CSV) ▼

Use the export options defined in the report.

Delimiter:

Separator:   Tab

Mode:  ▼

Report and page sections: —

Export  Do not export  Isolate report/page sections

Group sections: —

Export  Do not export  Isolate group sections



## Step Instructions

### 4 Click **Destinations**.

Set the destination directory of the pickup folder where the CSV files will be placed to be picked up by the utility.

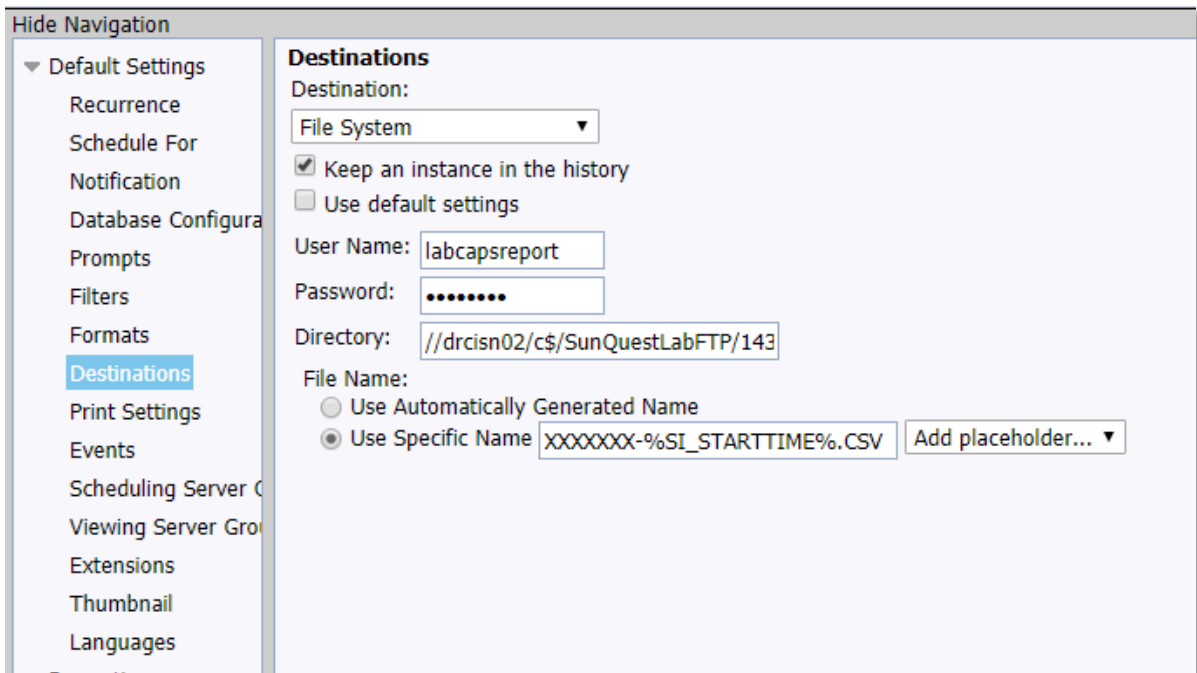
**Destination:** File System (if you don't see File System listed, you will need to add it – consult the BOBI Administrator's Guide)

**User Name/Password:** If the destination folder you are writing to needs credentials, enter it here.

**Directory:** Local or network share to output the report run.

*Note:* BOBI uses forward slashes (/) instead of backslashes (\) for separators (BOBI will automatically fix it for you when you schedule the report). In the example below, the destination is “//drcisn02/c\$/SunQuestLabFTP/1437701/Pickup”.

**File Name:** Select **Use Specific Name**. You can use the example below as a template, which is “XXXXXXX-%SI\_STARTTIME%.CSV” (you can choose the STARTTIME from the placeholder dropdown on the right). “XXXXXXX” represents a placeholder that will be used when you run the report. It represents the 7-digit CAP number for the specific run.





**Step Instructions**

**5** Click **Save**.

**6** Run the report.

Double-click the CAP report you'd like to run (LAB/CSQLLAB or TEST).

Under Schedule, click **Prompts**.

**Schedule: CAPAPT-LAB-v1.0**

Hide Navigation

- ▶ Default Settings
- Properties
- Categories
- ▼ Schedule
  - Instance Title
  - Recurrence
  - Schedule For
  - Notification
  - Database Logon
  - Prompts**
  - Filters
  - Formats
  - Destinations
  - Print Settings
  - Events

**Prompts**

Parameter	Scheduling Value
* ENV	[EMPTY]
* KitUID	[EMPTY]

\* Required



## Step Instructions

**7** Complete two separate prompts, ENV and KitUID. Click each one to populate the fields.

**ENV** – Select whether this is a Test or Result submission.

**KitUID** – The kit number you are requesting. This is the “Order Comment” in Sunquest. 8-digit, numeric only.

**Schedule: CAPAPT-LAB-v1.0**

Hide Navigation

- ▶ Default Settings
- Properties
- Categories
- ▼ Schedule
  - Instance Title
  - Recurrence
  - Schedule For
  - Notification
  - Database Logon
  - Prompts
  - Filters
  - Formats
  - Destinations
  - Print Settings
  - Events

**Prompts**

Parameter	Scheduling Value
* ENV	Result - Result Submission
* KitUID	1234567

\* Required



## Step Instructions

### 8 Click **Destination**.

*Note:* If you set the default settings above, this will be auto-populated. You'll have to change the "XXXXXXX" to the CAP number that correlates to the kit number that you entered.

The screenshot shows the 'Destinations' configuration window. On the left is a 'Hide Navigation' menu with options: Default Settings, Properties, Categories, Schedule (expanded), Instance Title, Recurrence, Schedule For, Notification, Database Logon, Prompts, Filters, Formats, Destinations (highlighted), Print Settings, Events, Scheduling Server C, Languages, User Security, History, and Limits. The main area is titled 'Destinations' and contains the following fields and options:

- Destination: File System (dropdown)
- Keep an instance in the history
- Use default settings
- User Name: labcapsreport
- Password: [masked]
- Directory: //drcisn02/c\$/SunQuestLabFTP/143
- File Name:
  - Use Automatically Generated Name
  - Use Specific Name: 1439901-%SI\_STARTTIME%.CSV
- Add placeholder... (dropdown)



## Step Instructions

**9** Once the Destination is set, click **Schedule**.

After you click Schedule, you'll be taken to the History tab. From here you can monitor the report that you just scheduled to run. It might take a while to run but it will eventually finish. If you receive a Success status, then the report successfully ran. If you receive a Failed status, left-click on the word "Failed" and note the error at the bottom and troubleshoot accordingly. If necessary, contact Sunquest Support for additional troubleshooting. Most common errors are missing prompts or an ODBC connection issue (check ODBC settings on the BOBI server).

## Viewing PT Extract Report Technical Information

The ideal view to use for the PT extract report is the GL\_ORDX\_MJ\_View; however, there are some fields that are not available in the standard (non-custom) version of this view. To make report installation easier for the client, the report was designed with internal table linking (from the SQ schema) that mimics this view, but also gives access to the necessary fields needed. This alleviates the need for the client to install a custom GL\_ORDX\_MJ\_View.



# TROUBLESHOOTING GUIDE

## Troubleshooting Matrix

*Note:* The LIS vendor (Sunguest) is responsible for troubleshooting problems with report installation and operation.

Problem	Potential Causes/Areas for Investigation
Error message when running the report	<ul style="list-style-type: none"> <li>• LIS system changes/updates made that may have impacted the report</li> <li>• Invalid information being entered into the report parameters</li> <li>• Infrastructure or network issues</li> <li>• LIS system issues</li> </ul>
Report runs but no file is found in the pickup folder	<ul style="list-style-type: none"> <li>• The Destination settings are incorrect</li> <li>• Report issues</li> <li>• Security changed not enabling access for the report to write to the pickup location</li> <li>• The file was moved by the agent, verify in the Archive folder or the hub</li> </ul>
Report runs extremely slow	<ul style="list-style-type: none"> <li>• There is a date parameter within the report that allows the query to go back a certain amount of time. This may need to be set to only go back 90 days.</li> <li>• Report issue</li> <li>• Network or infrastructure issue</li> </ul>
Cannot find the report to run	<ul style="list-style-type: none"> <li>• Report was moved due to a change</li> <li>• User does not have the appropriate security to view the report</li> <li>• Verify that you have the right environment and location</li> <li>• Report was removed by a system upgrade or change, or backup restore</li> </ul>