

MANUFACTURERS YEAR-END REPORT GENERATOR

USER GUIDE



DRUG ENFORCEMENT ADMINISTRATION
OFFICE OF DIVERSION CONTROL

Introduction to the Year-End Report Generator

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MANUFACTURERS YEAR-END REPORT GENERATOR

1. Welcome to the Manufacturers Year-End Report Program

The Manufacturers Year-End Report Generator was developed by DEA to provide registrants with an automated method of creating, viewing, editing, storing, and submitting year-end reports. Features of the program allow the user to:

- *Create Year-End Reports for procurement and manufacturing activities of Schedule I and II controlled substances.*
- *Create Year-End Reports for UN Schedule III and IV psychotropic substances.*
- *Create and manipulate the Year-End Reports grouped as a package according to year and DEA registration number.*
- *Create the Year End Report for Drugs Converted to Other Bulk Substances.*
- *Create Amendments.*
- *Receive built-in warning messages for data entry items that require additional explanation.*
- *Export Year-End Report information to disk for submission to DEA and for backup purposes.*
- *Import Year-End Report Generator information on disk from other DEA registrant locations and compile a single disk for submission to DEA.*
- *Maintain user Registrant and Contact information according to selected substances.*
- *Store entered information on the user's PC for easy retrieval as needed. Stored Year-End inventory is also automatically carried over to subsequent year beginning inventory.*
- *Apply optional password protection for program security.*
- *Access program Help file.*
- *Print information in paper-based Year-End Report format.*

This User Guide provides general instructions for the use of the Manufacturers Year-End Report Generator. More detailed information on individual topics is found in the program's Help File. Specific subject-matter questions concerning the Year-End Report should be directed to the Office of Diversion at 202-307-7183.

2. System Requirements

The Manufacturers Year-End Report Generator is designed to run on minimum system requirements of a Pentium II processor with 64 MB RAM and a Windows 95 operating system. The recommended free hard drive space is approximately 32 MB. This estimation would allow for installation of the program and approximately 5-10 MB for database growth. Additional space may be needed in the future depending on the volume of records reported per year. A floppy disk drive is required to export the report onto disk for mailing to DEA. A CD-ROM drive or an Internet connection is also required for initial installation of the application.

3. Installing the Year-End Report Generator

The Report Generator can be installed from CD-ROM or downloaded from the OD Website (WWW.DEADIVERSION.USDOJ.GOV).

- CD-ROM Installation:
 - a. Place the Year-End Report Generator Installation CD in the CD-ROM drive.
 - b. From the Start Menu, select Run
 - c. In the Run Dialog, type D:\setup.exe (where “D” represents the drive letter assigned to the CD-ROM drive)
 - d. Follow the directions on screen to complete the installation.

- Web-based Installation:
 - a. Your computer requires an available Internet connection. The approximate download time using a 56K modem is 35 minutes. A DSL or T1 connection will take considerably less time.
 - b. Follow the download directions provided on the OD Website.

During installation of the program files, you may receive a message(s) indicating a “Version Conflict” with specific Windows files already on your computer. It is generally recommended to retain the latest version of the file as version upgrades are downward compatible with earlier files and will not impact your existing programs. If the newer file version is required in the Year-End Report Generator, the program cannot run properly without it.

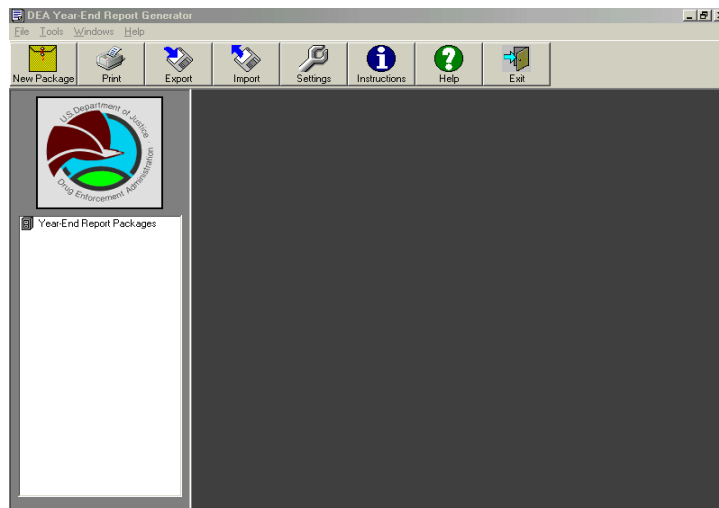
4. Manufacturers Year-End Report Program Basics

The main program screen provides access to all areas of the Year-End Report Generator.

- Open the Year-End Report Generator
Go to Start, Programs, select Year-End Reports, click on Manufacturers Year-End Report Generator. If desired, a shortcut icon may be transferred to the Desktop for future access to the program. See Windows Help for instructions on how to create a desktop shortcut.

- View the Report Generator Display Window
The main program screen contains a display window with two viewing areas:
 - 1) Left area – a “Navigation Tree” will display a hierarchical list of “Packages” created according to Year, Registrant, and Reports. Views may be expanded or collapsed similar to Windows Explorer.

 - 2) Right area – workspace area where data will be displayed.



- View the Report Generator Toolbar and Menu Bar
The upper left of the main program screen provides a Toolbar with navigation icons linking to program functions. Rest the mouse pointer arrow over each icon to identify its use.

The Menu Bar, above the program Toolbar, provides access to additional program features.

Tools, on the Menu Bar, allows navigation to Application Settings, Registrant Information, Contact Information, Update Drug Lists (upon request by DEA), Password, and Program Users (when enabled by the user).

- *For first-time use of the program, it is recommended to verify application settings and enter user reference information prior to beginning the Year-End Report.*

5. Program Settings

On the program Menu Bar, go to Tools, Program Settings. (Program Settings may also be reached from the tool icon on the Toolbar below the program Menu Bar.)

- Database Location
The default database location is displayed (“C:\PROGRAM FILES\YEAR-END REPORT GENERATOR\yer.mdb”). If necessary, the database location may be changed by clicking on the ellipsis button (“.....”) to the right of the default location.

The database may also be compacted from this screen (See Section 17.)

- Report Paths
The Export (to disk) path identifies the location of the computer’s floppy drive. (*The Export report copy is designated for mailing to DEA.*) The default report path may be changed by clicking on the ellipsis button.

The Backup path may be set to provide a backup report on any of the computer’s drive paths. Be sure to include a previously created folder in the report pathname, if applicable. The default report path may be changed by clicking on the ellipsis button.

- Security (optional)
The password protection option of the Year-End Report Generator limits access to the program by unauthorized users. If the User Name/Password Login option is enabled (checked), be sure to follow directions given below to complete the process:
 - ✦ Click on the checkbox to enable the User Name/Password Login.
 - ✦ Exit the Manufacturers Year-End Report Generator program.
 - ✦ Re-enter the program from Start, Programs, Year-End Reports, or from your shortcut icon (if you created one).
 - ✦ When prompted for ID and Password, enter the default User ID (“admin”) and default User Password (“admin”).
 - ✦ Follow directions in Enter Program Users (Section 7) to add a new program user.

- 4 Follow directions in Change Password (Section 8) to change the current password.

The security feature may be turned off at any time by un-checking the Enable User Name/Password Login function under Tools, Program Settings.

6. Enter Registrant and Contact Information

On the program Menu Bar, go to Tools, Add/Edit Registrant Information.

- Click on the Add button to enter Registrant Information. Entered information is listed on the Registrants screen. Listed information may be edited or deleted by highlighting the desired Registrant row, and clicking the appropriate button. It is not possible to enter information directly on the Registrants screen.

On the program Menu Bar, go to Tools, Add/Edit Contact Information.

- Click on the Add button to enter Contact Information. Entered information is listed on the Contacts screen. Listed information may be edited or deleted by highlighting the desired Contact row, and clicking the appropriate button. It is not possible to enter information directly on the Contacts screen.

7. Enter Program Users (optional)

On the program Menu Bar, go to Tools, Add/Edit Users. (If this feature is inactive, follow the steps listed in Application Settings - Security (Section 5) to access this option.)

- The program's default User Name and Password are "admin". The default may be changed as desired.
- Enter new user – Click on the Add button to enter User Information. Entered information is listed on the Users screen.
- Edit existing user record – Listed information may be edited or deleted by highlighting the desired User row, and clicking the appropriate Edit or Delete button. It is not possible to enter information directly on the Users screen.

Do not enable the User Name/Password Login option (Program Settings) and delete the default "admin" entries without adding a new User entry. If there are no program users and the password option is enabled, future access to the Year-End Report Generator will not be possible.

8. Changing Password (optional)

This option changes the password of the current user.

On the program Menu Bar, go to Tools, Change Password. (If this feature is inactive, follow the steps listed in Program Settings - Security (Section 5) to access this option.)

- Enter current password. Enter and verify New Password. The password feature will not be activated unless the security option is enabled (Tools, Program Settings). The program's default password is "admin".

9. Create a Package

The Report Generator is organized according to **Package** modules. A Package is defined as a set of reports for a specific registrant within a specific reporting year. A Report Year may contain more than one reporting registration number. Each registration number has the option to create Year-End Reports for Procurement Inventory, Procurement Quotas, Manufacturing Inventory, Manufacturing Quotas, and Psychotropics. A Conversion Report is also created for each package that is created.

The **Package Wizard** is available to assist in creating or editing a Package. The **Report Wizard** is available to assist in creating or editing a Report.



Create a Package

- Right-click the Year-End Report Packages icon in the navigation tree. Left-click to select a New Package. A new package may also be created from the package icon on the Tool Bar.
- The Package Wizard will guide you through the steps in creating a new Package.
- Package Information.
 - ◀ Enter the requested Report Year.
 - ◀ Select Company and Contact Information from the available drop-down lists. The ellipsis (".....") button to the right of the drop-down arrow is used to add new, edit, or delete Registration and Contact information.
 - ◀ Buttons at the bottom of the screen provide options for navigating within the Package. Navigation is also possible using the navigation menu on the left side of the Wizard screen.
 - ◀ Identify substances for Procurement, Manufacturing and Psychotropic reports. Scroll quickly to a desired substance by entering the name in the box next to the Schedule I and II option buttons. Substances are moved between the Available and Selected lists by double-clicking on the desired substance, or by highlighting the substance and using the directional arrows ('<<' and '>>') to move between the two lists.

Create a Detail Report

- From the main program screen, expand the Package year to view selected substances.
- Double-click (or right-click and select Create Report) on the Report icon for a named substance.
- The **Report Wizard** is available to assist in creating or editing a Detail Report. Navigation is also possible using the navigation menu on the left side of the Wizard screen. Buttons at the bottom of the screen provide options for navigation within the Package.
- Enter report information, as indicated, to complete a Detail Report for each substance in the Package.
- Red Flag warnings are present in the program to alert that, under certain circumstances, a potential error exists in the report data. If the data entered is accurate, provide an explanation in the remarks section when completing the report.
- The completed Detail Report can be viewed in the same format as the paper-based Year-End Report. Click on the Edit button to make changes to the displayed report.

Complete a Conversion Report

One Conversion Report is created for each Package. Use this report only if it is a necessary report for your company.

- Double-click (or right-click and select Create Report) on the Conversion Report icon in the navigation tree.
- Line items are entered into this report automatically based on data entered into the “Put in Process for Conversion to Other Bulk Substances” line on the Detail Report. The information related to “Drug Converted” is a result of this operation and is not editable.
- Enter data on drug produced, as indicated.
- To return to view or edit the individual Detail Report, highlight a listed drug item, and click on the Jump To Detail Report button.

10. Create an Amendment

The Amendment function is available to edit the original Year-End Report that has been completed, exported to disk, and mailed to DEA. An Amendment to the Conversion Report is created, as needed, for a previously reported Package.

- Right-click and select Create Amendment on the report icon in the navigation tree for the named substance. An Amendment may also be created from the Edit button on the Detail Report screen.
- A new report (Amendment) is created that can be edited and sent to DEA containing corrections to the original report.

11. Export to Disk

Upon completion of the Year-End Report Package, the information should be exported to disk and mailed to DEA. The export function also allows the user to create a backup report on the computer drive designated in Program Settings.

- Disk Requirements –
Use a standard, formatted, 3.5” disk to compile the Year-End Report. This must be a clean disk with no data other than the Year-End Report. Affix a clean disk label with the following information:
 - Manufacturers Year-End Report
 - Company Name
 - Registration Number
 - Contact Name
 - Contact Phone
 - Reporting Period
 - Amendment Number, if applicable
- Go to File, Export, and select the desired Package to export. This function is also available from the Export icon on the toolbar of the main program screen.

12. Import Report Data

Data on disk may be brought into the Year-End Report Generator using the Import function. Reports compiled on disk at subordinate reporting locations using the Year-End Report Generator may be appended to the report that is generated at the primary reporting location. All reports can be compiled onto a single disk and mailed to DEA.

The import function may also be used by a single reporter to restore previously exported report data in situations requiring a database refresh. (See program Help File for additional discussion.)

- Go to File, Import. Designate the location of the report you wish to import. You may browse for the location by clicking the ellipsis button to the right of the pathname text box. Click the Import button to begin the import process. This function is also available from the Import icon on the toolbar of the main program screen or by right-clicking on the Year-End Report Packages icon in the navigation tree.

13. Mail to DEA

After the Year-End Report Package has been exported to disk, mail the disk to the Drug and Chemical Evaluation Section at the following address:

Matt Strait / DEA / ODE
8701 Morrissette Drive
Springfield, VA 22152

- **To avoid possible damage to the disk, it should be mailed via Fed Ex or Express Mail.**

14. Print Year-End Report

The print function provides the option to print an individual report, or a block of reports. The printed report is consistent with the paper-based Year-End Report format.

- Print an individual report
Right-click the desired report icon in the navigation tree, and select Print Report. The report will display in a print preview window.
- Print a block of reports
Go to File, Print (or click the Print button on the toolbar). A print dialog window will display for the selection of desired reports. Each report selected will appear in a print preview window.

From the print preview window, either click the printer button to print the report, or click the export button to export the report to a pre-determined format.

15. Program Help

Program Help is available through the Help features on the Menu Bar and on the Toolbar. For assistance with topics not addressed in program Help, and for problems encountered in the use of the application, contact the DEA Drug and Chemical Evaluation Section at 202-307-7183.

Help, on the Menu Bar, allows navigation to Help Topics, the Read Me File, Year-End Report Instructions, and About the Year-End Report Generator.

- Help Topics
Select Help Topics, and follow the directions on the screen. Operation of the Help function is similar to the standard Windows Help format. Help Topics are also available from the “?” (question) icon on the Toolbar.
- Read Me File
The program’s Read Me File provides general information about installing and running the program, the application features, and getting help with the program.
- Year-End Report Instructions
General instructions from the Drug and Chemical Evaluation Section are listed for completing each type of Year-End Report. These instructions are also available through the “i” (instructions) icon on the Toolbar.
- About the Year-End Report Generator
“About” identifies the version number of the program in use. DEA may request that you identify the version number if contacting DEA for assistance in using the Year-End Report Generator. The computer’s system settings are referenced by selecting the System Info button.

16. Application-Defined Errors

There are several application-defined errors that apply directly to creating, editing, saving, and deleting year-end report data. These errors are listed by number and description in the program Help file under Other Information. If any of these errors are received on a non-isolated basis,

contact Drug and Chemical Evaluation Section at DEA with the error number and a description of how the problem occurred.

17. Program Database

Backing up the database

The Manufacturers Year-End Report Generator stores your report data, registrant information, and contact information in the yer.mdb file. It is essential to back up this database for retention of data in the event of computer failure. A backup report may also be created at the same time the report is exported to disk. (You may want to print a hard copy of the reports submitted for your files.)

Compacting the database

After time, program performance may slow. The database can be compacted to make use of unused space. From Program Settings, click on the Compact button located below the Database text box.

18. Update Drug Lists

Updates to the existing program drug lists will be provided, as needed, by DEA with instructions for installing the update.



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