Using the Report Wizard

16/07/2025 12:14 pm BST

Summary

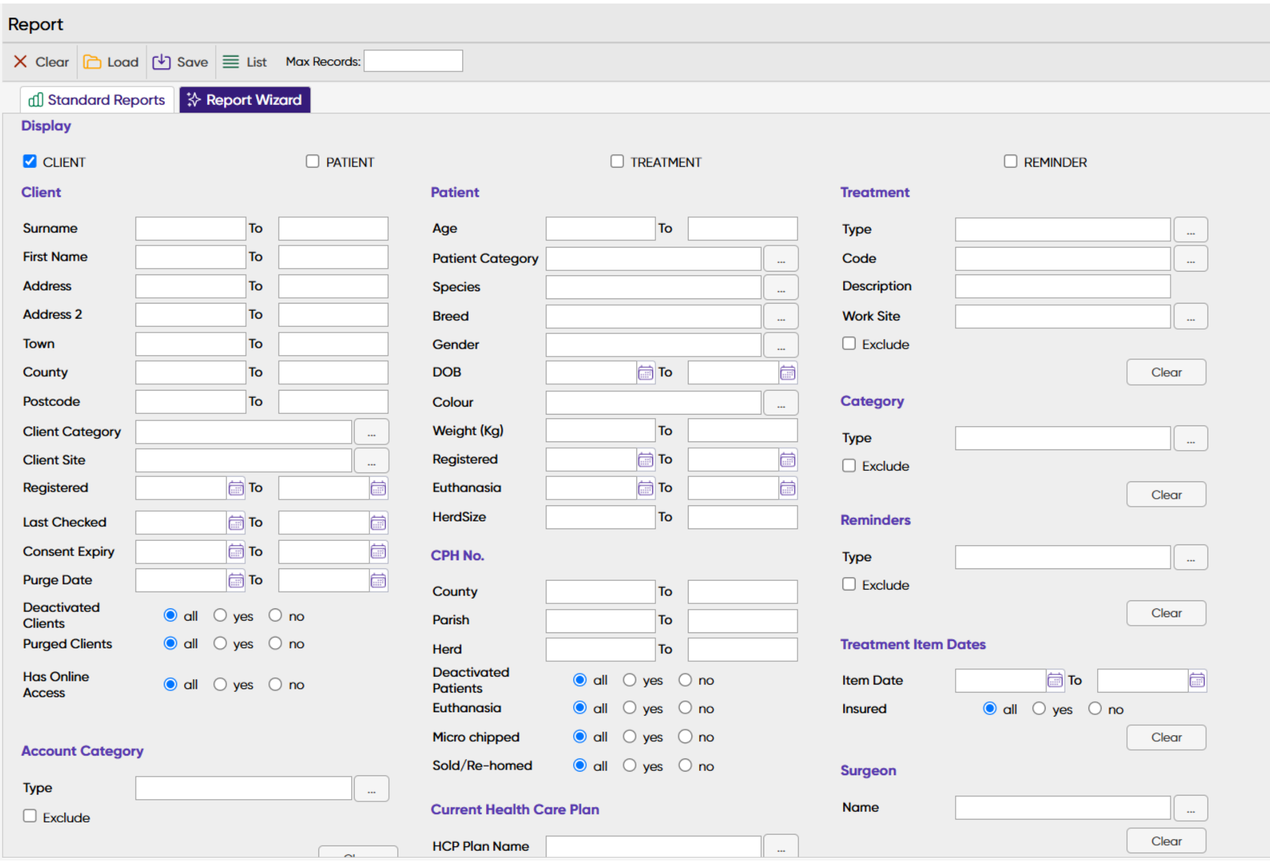
The Report Wizard screen is used to collate data from specified criteria. This data can then be exported or used to communicate with Clients.

Details

Using the Report Wizard

1. Navigate to Reports from the Primary Navigation on the left-hand side and select the 'Report Wizard' tab.

2. The Report Wizard will display.



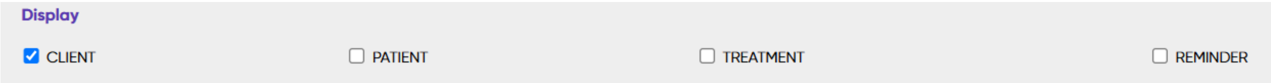
3. Specify your report criteria.

The Report Wizard has seven sections you can filter by. These sections are Client, Patient, Treatment, Treatment Category, Reminders, Treatment Item Dates and Surgeon.

Every section has its own filters and options which can be used or ignored if not required for the results required. Once all the required filters have been applied then the report can be Run.

Display Options

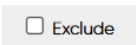
Select what information you would like to display in your report. You have the option to display: Client, Patient, Treatment and Reminder details. You can select any combination or all of details as required.



Note: If you do not wish to display duplicate Client records, enable the 'Client' display option only.

Standard Options

Every section has a clear button or additional tick boxes, which will be covered for all sections in the table below.

Name	Button	Description / Function
The 'Clear Button'		The Clear button will remove any user input from the fields in the section that the Clear button belongs to.
All / Yes / No		All = Include all patients in report (Do not filter by Yes / No) Yes = Only show data that meets criteria No = Only show data that does not meet criteria. For example, if 'No' is selected for Micro chipped, then the report will only show patients that do not have a microchip.
Exclude		This allows you to select the criteria and then choose to exclude it from the results, therefore displaying all other matching results and not those set to be excluded.

From ... To ... Filtering

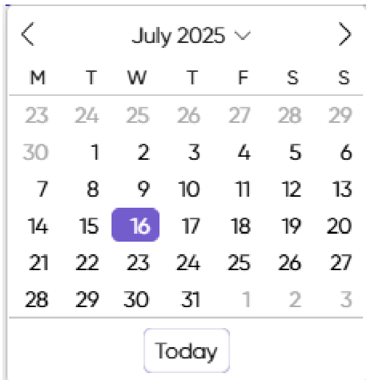
In the Client and Patient sections the results can be filtered by using the ‘From’ and ‘To’ fields which will generate results between the two values.

To capture all clients, using from 0 to zzz will ensure all possible client surnames are included.

From ... To ... Calendar

When selecting dates from the drop down calendar the dates find results up to and including the date entered into the From field.

Selecting the drop down list will make a small calendar appear as shown below.



There are several options available here, the first being 'Today' along the bottom of the calendar. If the results target date is Today then select the today button, this will select the current date.

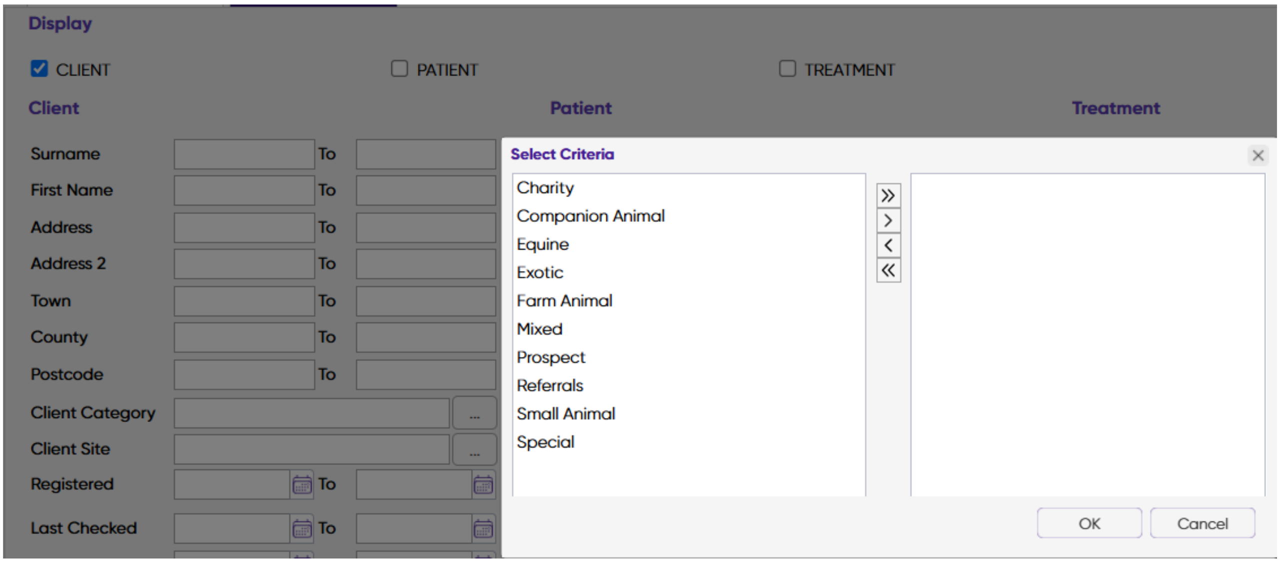
If the date range is in the current month then select the date from the month shown by clicking on the number, Today's date is shown in a blue box.

To navigate through the months up or down, use the small white arrows pointing left to drop down or right to jump up a month. Also by clicking on the month name a list appears with the months/years. Select the month and year required to jump to that month.

Criteria Selection

The Criteria selection button as shown below, will add extra filters into the Report Wizard, by selecting the button to the right with three dots.

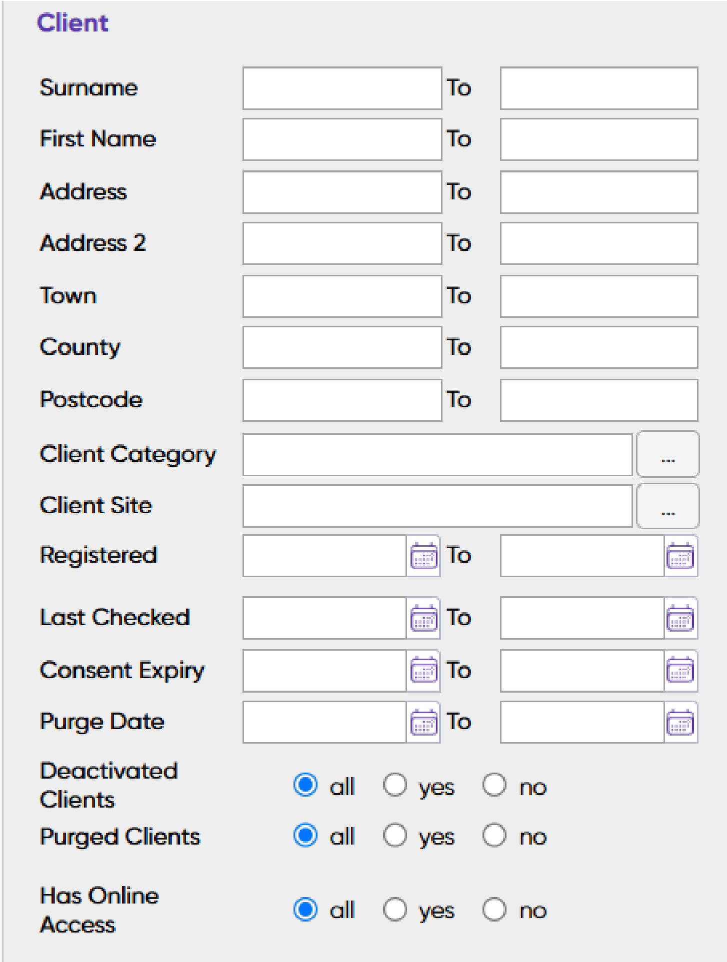
Once the button has been selected, the following menu appears:



All items on the left are not selected for the Report Wizard filter. To add to the filter select the name on the left and select the right button, this will move the name across to the right hand list. Everything in this list will be part of the Report Wizard filters once the OK button is selected. To remove any required criteria then select the name in the list and select the left button.

Client Section

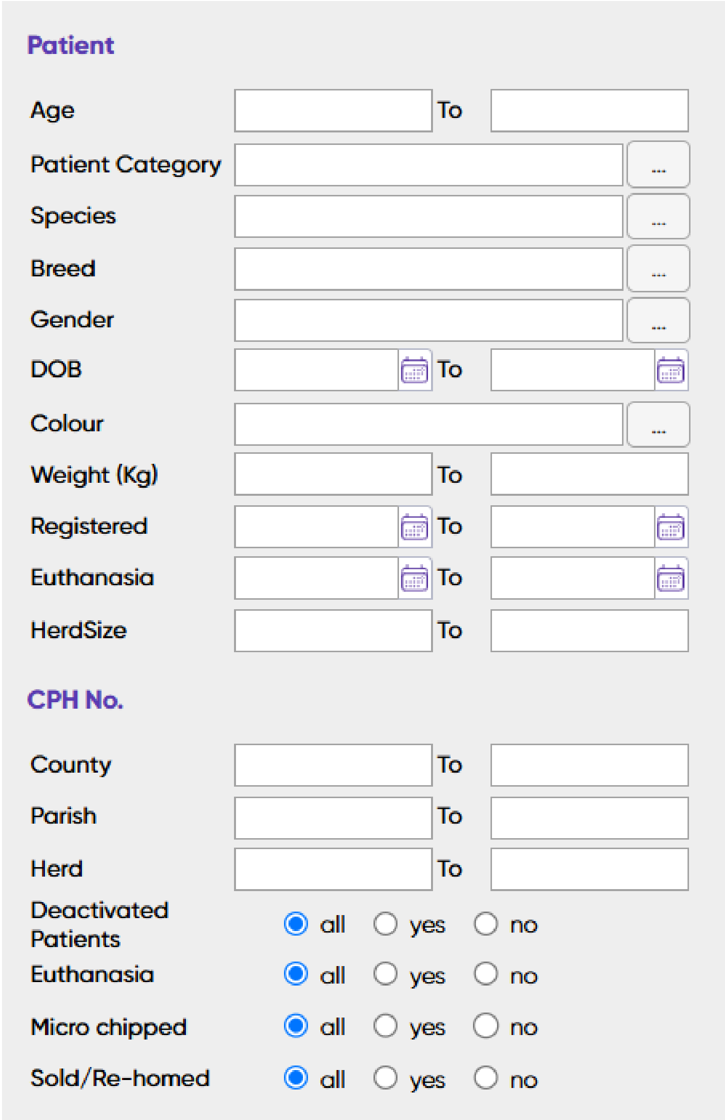
The Client section has several filtering options on the clients' names and addresses which use the From and To filter. The Client Category refers to the type of client the report requires, for example Small Animal and Equine. This filter is for practices for different client types. Client Site is the site that the client is registered to, the filter allows the Report Wizard to select particular sites, this filter is for practices with multiple sites.



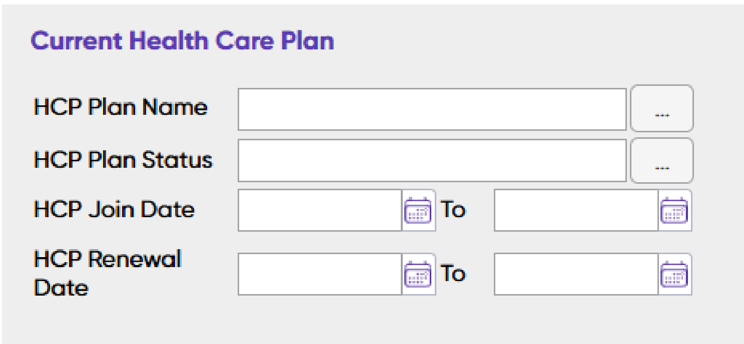
Patient Section

The Patient section is where the Report Wizard can filter by the animal's details. This section has two different ways to filter by patient age. The first method is using the To and From fields for Age, this requires the age in years only and will include the From value in the results. The second method is to use the date of birth (DOB) method and select the date from the micro-calendar.

The Species and Breed selections are related and will help aid in the criteria selection. When a Species is selected, the criterion under Breed has been reduced to only show the breeds associated with the selected Species.



The Health Care Plan option allows users to produce reports using HCP criteria.



Treatment Section

The Treatment section has two filters associated with each other; the same method is used for Species and Breed under the Patient Section. The Type field refers to the treatment type used in Code Entry, for example Injection Stock and Diagnostics.

Category Section

The Category section allows to filter by or filter out (using the exclude option) on the treatment category , which was setup for each item in code entry. This must be setup in code entry to be used.

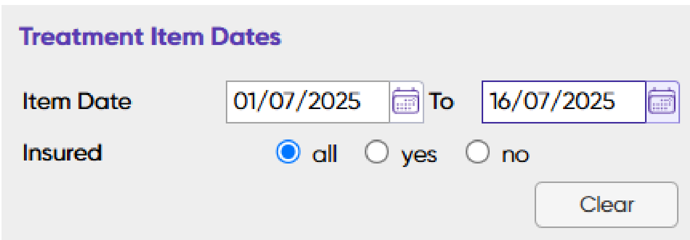
Reminders Section

The Reminders section will filter by the Reminder Type on patients; the Report Wizard is also able to exclude the selected Reminder type.

For example, if Vaccinations are selected in the Reminders section. This will generate results for all patients with Active Reminder Types of Vaccinations.

Treatment Item Dates Section

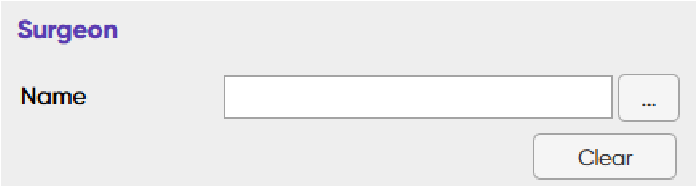
The Treatment Dates section will filter out all possible results that are not between the Start and End treatment dates specified.



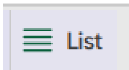
Surgeon Section

The Surgeon section will filter the results by the selected surgeon names that appear against treatment items.

The same surgeon may appear several times if they were added to multiple sites.

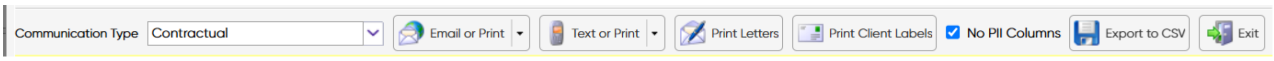


4. One you have specified your criteria, select 'List' to generate a list of Patients/Clients that meet your criterion.



Report Wizard Results

Once the report has been run, you have the following five options:



Email or Print

Used to send an email to all your clients who have an email address registered. You also have the option to generate a letter for those clients who do not have an email address registered. See Sending Emails from Report Wizard

Text or Print

Used to send an SMS to all your clients who have a mobile number registered. You also have the option to generate a letter for those clients who do not have an mobile number registered. See Sending SMS from Report Wizard

Print Letters

Produces a mail-merge document that can be sent to the clients in the results. The mail merge menu is consistent with the rest of the system and operates in the same way as consent forms.

Print Client Labels

Produces sheets of address labels on a Laser printer. The label sheets you require are of the Avery Standard L7163 which contains 14 labels per sheet.

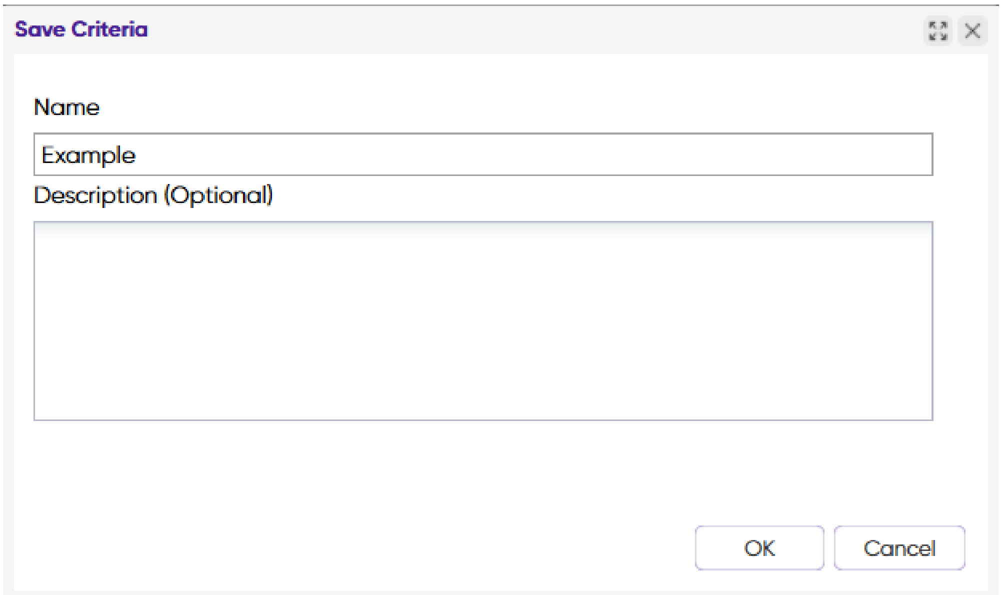
Export to CSV

Produces a list of all the information requested by the filters which can then be saved in a CSV file format. When exporting to CSV you may not require Personally Identifiable Information (PII), the option No PII Columns is automatically ticked to help prevent a data breach, if you do need to export with PII then untick the box before exporting.

Save Report Criteria

The Report Wizard has a save feature which allows all the filters to be saved and loaded when next required.

1. Enter your criteria using the report wizard.
2. Select the 'Save' button.



3. Enter a Name and Description of the filters entered.
4. The Criteria will be saved.

Load Report Criteria

1. Select the 'Load' button.

2. Select your saved criteria.
3. The criteria will be populated.