


## Batch Reporting on SystemOne

Batch reporting allows you to set a clinical report to run automatically at a scheduled date and time and will task an individual or group with the batch results.

Batch reporting can be found under **Reporting, Batch reporting** and then click on **'Create New Batch'**.

To set up the Batch Report:

- Give the batch a name
- Click add to search and add clinical reports that you want to run as a batch
- Set a date and if needed then run every number of - days / weeks / months
- And if you want to generate a task, specify who or which group to send it to



The screenshot shows the 'New Batch Report' dialog box. The 'Batch name' field is highlighted with a red box. Below it, the 'Details' section is expanded. In the 'Run these reports' section, the 'Add...' button is highlighted with a red box. Below this, the 'On this date' date picker is highlighted with a red box. The 'Then re-run every' checkbox is unchecked. The 'Send task' checkbox is checked. In the 'Task details' section, the 'Send task to' radio buttons are highlighted with a red box, with 'Unassigned' selected. At the bottom, the 'OK' and 'Cancel' buttons are visible.

On the specified date you have set up, a task will appear in the inbox. These tasks have a task type of **'Batch Report Results'** so can easily be identified.

To action the task, Right click on the task and select action.

The example below shows a Batch Report based on two clinical reports that identifies patients who have not been coded as informed of their named GP and patients who have not been coded as allocated a named GP.

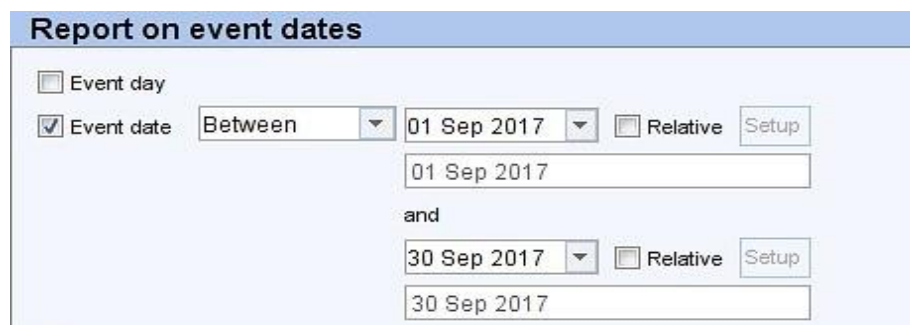


From this window, right click to view patients and you can also add bulk codes, etc. as required.

If you are required to review some reports on a monthly/quarterly basis, you will need to amend the Clinical Reporting dates before including them in your Batch Reports.

**This can be done it two ways:**

1. First set up the batch report as mentioned above but amend the Clinical Report dates to show a specific period you need to report. For example, the window below shows a clinical report set up to show data for the month of September only.



**Report on event dates**

Event day

Event date: Between 01 Sep 2017  Relative Setup

01 Sep 2017

and

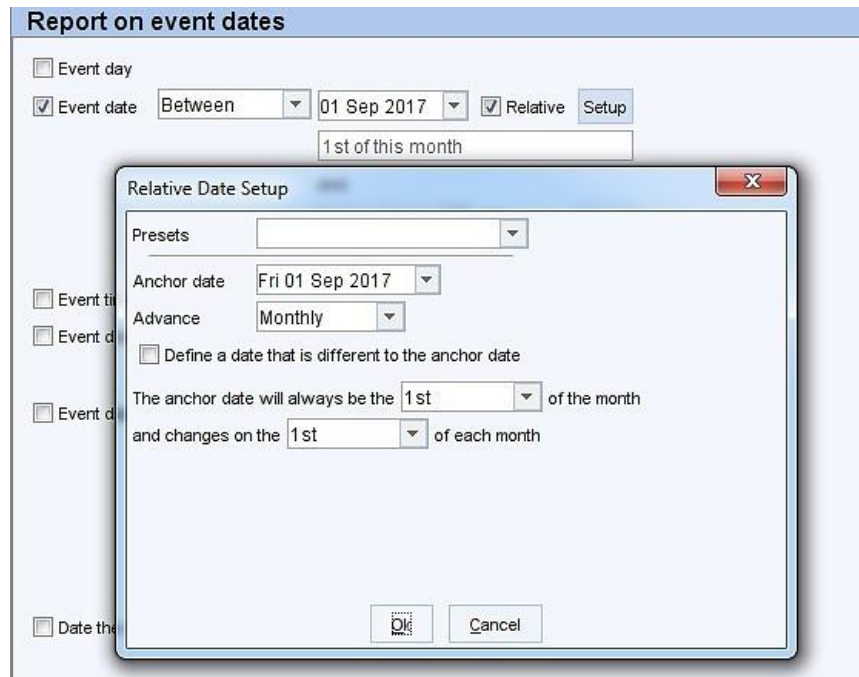
30 Sep 2017  Relative Setup

30 Sep 2017

The report dates would then need to be amended again to view October's results.

2. Set dates using the 'Relative' and 'Setup' options.

Click on the 'Relative' button and the 'Setup' button will then become active. For example, you can set the report to advance the search dates on a daily, monthly or yearly basis and specify when these changes come into force.



If you set the batch report to run after this date change takes place, then you will have setup automated reporting for the specific set of data that will then arrive as a task into the specified inbox.

Version	Date	Author	Status	Comment
0.1	09/01/2025	Medicines Optimisation Repeat Prescribing & Support Team	Final	New document submitted to PFG and TAG for info to support ongoing work