



Employee Health and Occupational Medicine
Automated Batch Reporting
Administration and User Guide, Version 11
May, 2021



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Automated Batch Reporting

Automated (Scheduled) Batch Reporting Service is a service that interacts with several areas of our software in a way that provides efficient and convenient communication of reports. The complete service uses two separate features: **Scheduled Batch Reporting** and **Creating Batch Reports**.

Creating Batch Reports

The Batch Reporting Button is located on the NAV bar. Both the setup and manual running of the batches occurs from the same window. The *Add*, *Change*, and *Delete* buttons are used to create and modify existing batch reports. The setup of a batch is relatively easy. All of the memorized reports will display in the right pane of the window; to have them become part of the batch, users can simply move them to the left pane of the window. In order to print a batch of reports, the user can highlight a batch and click the *Print Batch* button. Also, the selection window will display for the user to enter the time period of the data to be included on the reports.

Preview how to use Batch Reporting:

1. From the **Reporting** Nav bar, under Special, Select **Batch Reporting** button to display the [Report Batches] maintenance window.



2. Use the [Report Batches] window to *Add*, *Change*, or *Delete* specific reporting batches.

Automated Batch Reporting



Report Batches (CLINIC)

Search:

Shared Report Batches

Report Batch Title Description	Created By		Last Run	
	User	Date	User	Date
big bear	STUDENT	11/27/2012	STUDENT	11/27/2012
first report	STUDENT	11/27/2012		
first report acme	STUDENT	11/27/2012	STUDENT	11/27/2012
Memorized Letter	STUDENT	11/27/2012	STUDENT	11/27/2012
TB Memorized Letters	STUDENT	11/27/2012	STUDENT	11/27/2012

Navigation: [Previous] [Next] [First] [Last] [Find] [Refresh]

Buttons: **Add** Change Delete Print Batch Close

3. As an example, to add a batch:

- Click the **Add** button to display the [Enter Report Batch] window.

Enter Report Batch (STUDENT)

Batch Details | Reports Included in Batch | Default Reporting Options | Copy/Fill Options

Report Batch Title:

Brief Description:

Required for Status Reports and Notices

Reporting As Of:

Required for Analysis Reports

Reporting Period From: Thru: **This Month**

Required for Time Comparison Reports Only

Previous Period From: Thru:

Created By: STUDENT on: 2/04/2013 at: 3:08PM

Last Changed By: on: at:

Last Print By: on: at:

Buttons: OK Cancel

- Enter the batch title and a brief description for identification purposes.
- The next three data entry areas are designed to save the criteria needed to capture the information users want on a report. While you can “hard code” the actual dates wanted for a specific report, we do not advise you do that. Instead of entering actual dates, we recommend you use the drop down to the right of the field to use generic criteria.

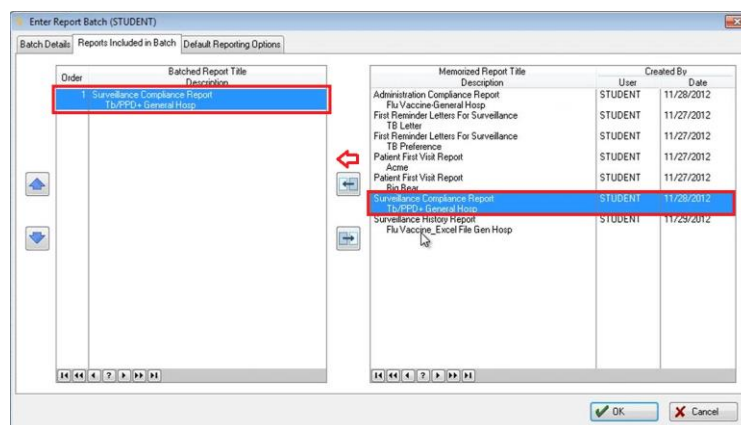
Automated Batch Reporting



- By clicking on the dropdown, you have the choice of selecting a period that is based upon the current date. That is, the desired period is generated as a date range based on the current date as a reference point. For example, if you select “This Quarter,” the date range will be created based upon whatever quarter the current date (the report is run) falls in. If the current date the report is run is 02/21/2013, the information on the report would be reflective of the first quarter.



- The eraser icon allows you to remove an entry from the dropdown selection.
- Once you establish the report criteria for the batch, click on the **REPORTS INCLUDED IN BATCH** tab to select which reports will make up this specific batch.



The right pane represents available reports for this batch – the reports that have been previously memorized. Select a report from the right pane and click the arrow button pointing to the left pane to include that specific report in this batch.



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To remove it from the batch, highlight the report in the left pane and click the arrow pointing to the right. To complete the process, click **OK**.

- To print the batch, click the **Print Batch** button on the [Report Batches] maintenance window. The [Print Report Batch] window displays.

Print Report Batch

Batch Details: Default Reporting Options

Report Batch Title: Memoized Letter

Brief Description:

Required for Status Reports and Notices

Reporting As Of: 2/04/2013 Today

Required for Analysis Reports

Reporting Period From: 1/01/2013 Thru: 2/04/2013

Required for Time Comparison Reports Only

Previous Period From: Thru:

Created By: STUDENT on: 11/27/2012 at:

Last Changed By: on: at:

Last Print By: STUDENT on: 11/27/2012 at:

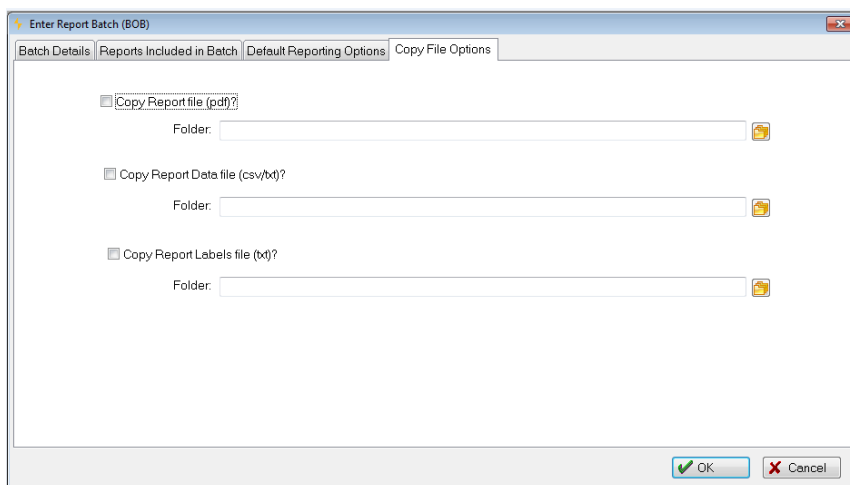
☐ Preview Reports?

- Each of the required date criteria should be entered depending upon what type of reports you have included in the batch. Specific dates may be entered, but again, we do not advise you do that.



Automation of Report Exports

This function allows any data that exists within reports that can be memorized and batched within the software to be scheduled for automation. The report will automatically run and create a file that can be used to interface data from the software into another system for all customers. This modification makes it easy to export data from existing the software reports.



Users may select an export as part of the automation by designating the type(s) of file to be exported and the location that the file will be populated. The target folder can be typed in or selected with the file icon to the right of the field.

There are three types of files that can be copied as part of the automation:

- PDF
- CSV
- TXT (text file)

Select the appropriate check box to indicate the type of file that is to be copied as a result of the selected report run. No selection will cause the file to NOT copy to the designated folder.

If a file type is checked and no target folder is designated, the software will display an error and request a correction.

If a file type is selected (the box is checked), and the designated folder does not exist or the Automation Service does not have rights to the folder, the file is not copied and an error is generated. The error can be found in a folder that is automatically generated within the user's local drive in a folder designated with Public\Documents\Net Health\Automation Services.

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NOTE: It is important to note that the Automation Service must have write access to the target folders specified for the exported file copy or the copy will fail.

The file will be located in the selected target folder with the following naming convention that ensures a unique name:

Report Title (User selected)_Current date **YYMMDD**_Current military time **HHMMSS.ext** (may be PDF, CSV, TXT)



Scheduled Batch Reporting Service

Our software has the capability for users to memorize reports that may require recurring processing, and to create batches of reports that could be run on demand, such as monthly surveillance reports and notices. In addition, our systems include the ability to set up Windows Services for monitoring and executing "behind the scenes" tasks, such as real-time interfaces, scheduling bridge file imports, etc.

Automated Batch reporting provides a generalized automation capability whereby users, with the appropriate access levels, can schedule large scale batch operations. The first step to implement this function has to do with scheduled reporting. Users can schedule any *Batch Report* to run on a specific date and time, or to run on a recurring basis, such as weekly or monthly. The report output will be saved into the database for later access and printing.

Prior to using the Automation Service for batch reporting,

- Users must designate the machine which will do the processing.
- The machine must have both the software and the **Admin module** installed and running.
- Users must have access rights to the software's database.
- All of the current Interops must be installed.

The service must then be:

- Installed
- Configured
- Started

At this point, additional buttons and options will appear in the software and the **Admin module**.

To schedule an automated batch as a user:

1. From the **Reporting Nav** bar, under Special, Select **Batch Reporting** to display the [Report Batches] window.
2. Click the **Add** button at the bottom left of the window to display the [Enter Report Batch] window.
3. Notice the **Report Batch Automaton Schedule** button that is now displayed at the bottom left. This only appears if the Automation service is installed, configured, and started correctly. Select the desired batch and click the **Report Batch Automaton Schedule** button to begin the scheduling process.

Automated Batch Reporting



Enter Report Batch (STUDENT)

Batch Details

Reports Included in Batch

Default Reporting Options

Report Batch Title:

Nancy Nurse Monthly Reports

Brief Description:

Monthly Reports

Required for Status Reports and Notices

Reporting As Of: 3/02/2013 End of This Week

Required for Analysis Reports

Reporting Period From: 1/01/2013 Thru: 12/31/2013 This Year

Required for Time Comparison Reports Only

Previous Period From: Thru:

Created By: STUDENT on: 3/01/2013 at: 3:24PM

Last Changed By: on: at:

Last Print By: on: at:

Report Batch Automation Schedule

OK Cancel



4. The [Schedule Automation Task Service] window displays.

This window allows users to create the specifics for the batch schedule. The user that creates the *Automated Batch Schedule* for a batch owns that schedule independent of all other schedules for the same batch that may have been created by other users. It can be configured and set up as necessary by the user that first created it. Users may create, change, delete or make the scheduler inactive.

Default values for a new schedule are:

- Beginning date is the **Current Date**.
- Beginning Time is **12:00 am**
- Occurrence of **Daily**.
- To run **Everyday**.

Automated Batch Reporting



To change the defaults, enter the desired settings.

1. Users will need to decide what day they want the automated batch to begin running and at what time of the day.
2. Next, the system will need to know the reoccurrence of the task. Each selection may prompt other criteria:

Daily

With this choice, two additional selections display.

Daily Settings Weekly Settings Monthly Settings

Which days should the task run on?

☒ Everyday

☐ Weekdays (Monday - Friday)

Weekly

With this choice, users may select one or more specific days.

Daily Settings Weekly Settings Monthly Settings

Which days of the week should the task be run on?

☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday

☐ Thursday ☐ Friday ☐ Saturday

Monthly

This section has several choices

First, select the month for the schedule.

Daily Settings Weekly Settings Monthly Settings

Which months should the task be run in?

☐ January ☐ April ☐ July ☐ October

☐ February ☐ May ☐ August ☐ November

☐ March ☐ June ☐ September ☐ December

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Then you have two possibilities for the days. You may select a specific day for the scheduled batch.

Select Specific Days			Select Recurring Days			
<input type="checkbox"/> 1	<input type="checkbox"/> 6	<input type="checkbox"/> 11	<input type="checkbox"/> 16	<input type="checkbox"/> 21	<input type="checkbox"/> 26	<input type="checkbox"/> 31
<input type="checkbox"/> 2	<input type="checkbox"/> 7	<input type="checkbox"/> 12	<input type="checkbox"/> 17	<input type="checkbox"/> 22	<input type="checkbox"/> 27	<input type="checkbox"/> Last
<input type="checkbox"/> 3	<input type="checkbox"/> 8	<input type="checkbox"/> 13	<input type="checkbox"/> 18	<input type="checkbox"/> 23	<input type="checkbox"/> 28	
<input type="checkbox"/> 4	<input type="checkbox"/> 9	<input type="checkbox"/> 14	<input type="checkbox"/> 19	<input type="checkbox"/> 24	<input type="checkbox"/> 29	
<input type="checkbox"/> 5	<input type="checkbox"/> 10	<input type="checkbox"/> 15	<input type="checkbox"/> 20	<input type="checkbox"/> 25	<input type="checkbox"/> 30	

Or you may select a reoccurring day with references to which week in the month and which week day.

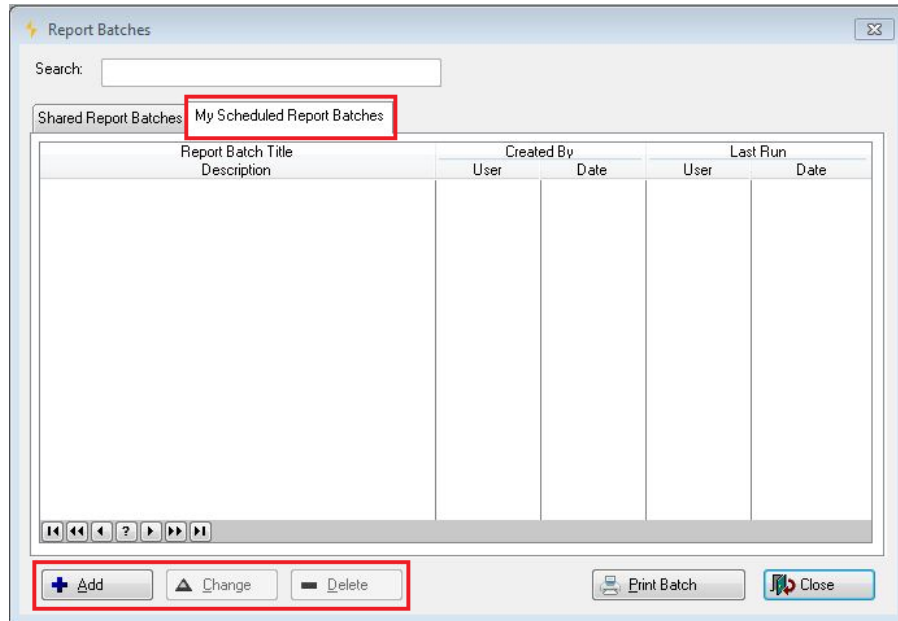
Select Specific Days	Select Recurring Days		
<input type="checkbox"/> First	<input type="checkbox"/> Sunday	<input type="checkbox"/> Monday	<input type="checkbox"/> Tuesday
<input type="checkbox"/> Second	<input type="checkbox"/> Wednesday	<input type="checkbox"/> Thursday	<input type="checkbox"/> Friday
<input type="checkbox"/> Third	<input type="checkbox"/> Saturday		
<input type="checkbox"/> Fourth			
<input type="checkbox"/> Last			

3. Select **OK** to save the schedule.

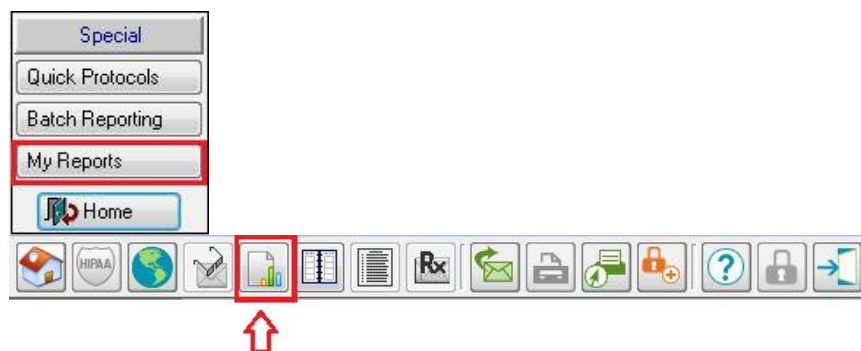
Automated Batch Reporting



4. On the [Report Batches] window, an additional tab will display to show what batches have been scheduled by the user logged into the software at the time.



5. Another window has been added, [Review My Reports]. Users may open the window through either a new button on the NAV bar, or a new icon on the tool bar located at the top of the software window.



All scheduled batch reporting is delivered in the form of a PDF (and/or additional files if the report was memorized with other options). The reports are delivered to the same user that created the schedule.

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NOTE: When the tool bar icon is blinking, that is an indication that the user has reports that have not yet been reviewed.

To review the reports, open the [Review My Reports] window in one of the two ways mentioned above, and double click on the file you want to open. Users may also select the *Review* button to do the same thing. A *Delete* is available and to gain a full list of the reports (reviewed or not), check the checkbox *Include Reviewed Reports?* at the top right.

Date	Report Title Description	Status	# of Files	Last Reviewed	
				Date	Time

The Automation Service also includes changes to the **Admin module**. For information on the administrative windows as well as assistance with installing and configuring the Automation Service, please contact **Net Health Support**.



Summary

We hope that this guide has been helpful in setting up and utilizing the Automated Batch Reporting Service. If you have questions or need assistance, please contact Net Health Support at: 844-464-9348, Option 3 or ehocmed-support@nethealth.com.