Velos Reports User Manual

Released January 2008

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Using Velos Reports

Getting Started

In Velos, click on the **Reports** icon on the right of the top toolbar to open the **Velos Reports** window, shown in Figure 1. This window is divided into four sections. On the top left, under the heading **Report Categories**, you will see a list of all folders containing reports. Each folder represents a particular category of report. When you choose one of these categories by clicking on it, a list of reports will appear in the boxes on the right of the window. Any **Base Reports** or **Inherited Reports** from the chosen category that are available will appear in the corresponding boxes. (See the following sections for more on the difference between base reports and inherited reports.) When you choose a report by clicking on the name of it in either the **Base Reports** or **Inherited Reports** section of the window, a description of the report will appear on the bottom left of the window, under the **Report Description** heading.

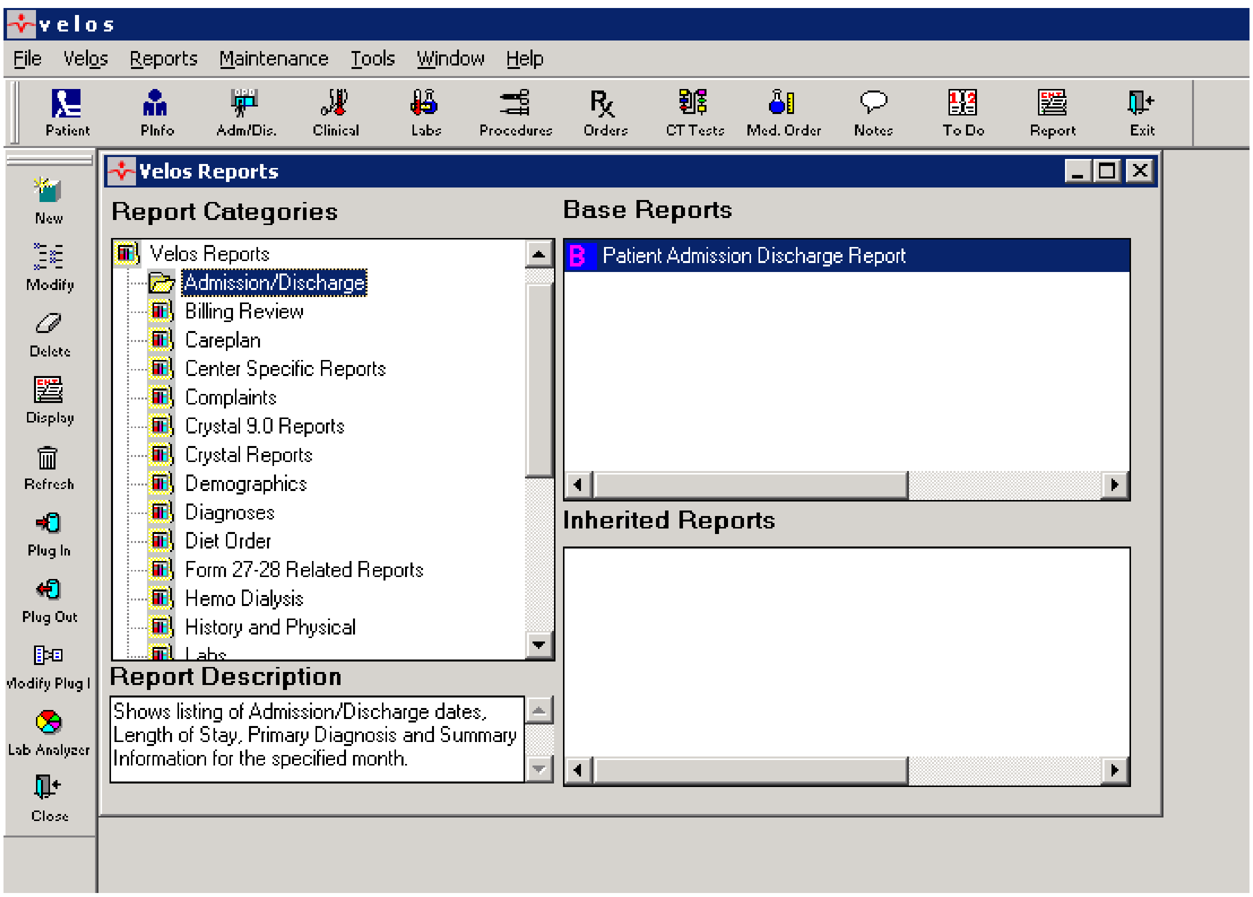

Figure 1: Velos Reports Window

Selecting a Patient

Some Velos reports are designed to be run for all patients in the system, while a few others are only useful when they are generated with data from one single patient. However, the majority of Velos reports can be used either way—including data from just one patient or from all patients. You will determine if you run the report for a single patient or all patients by whether or not you have selected a patient when you run the report. For example, to run the report for one particular patient, simply select him/her in Velos before you run the report, making sure the correct patient's name is displayed in the status bar at the bottom right of the Velos window. In the example shown in Figure 2, the user can run the selected report to generate data about Joe Jones only.

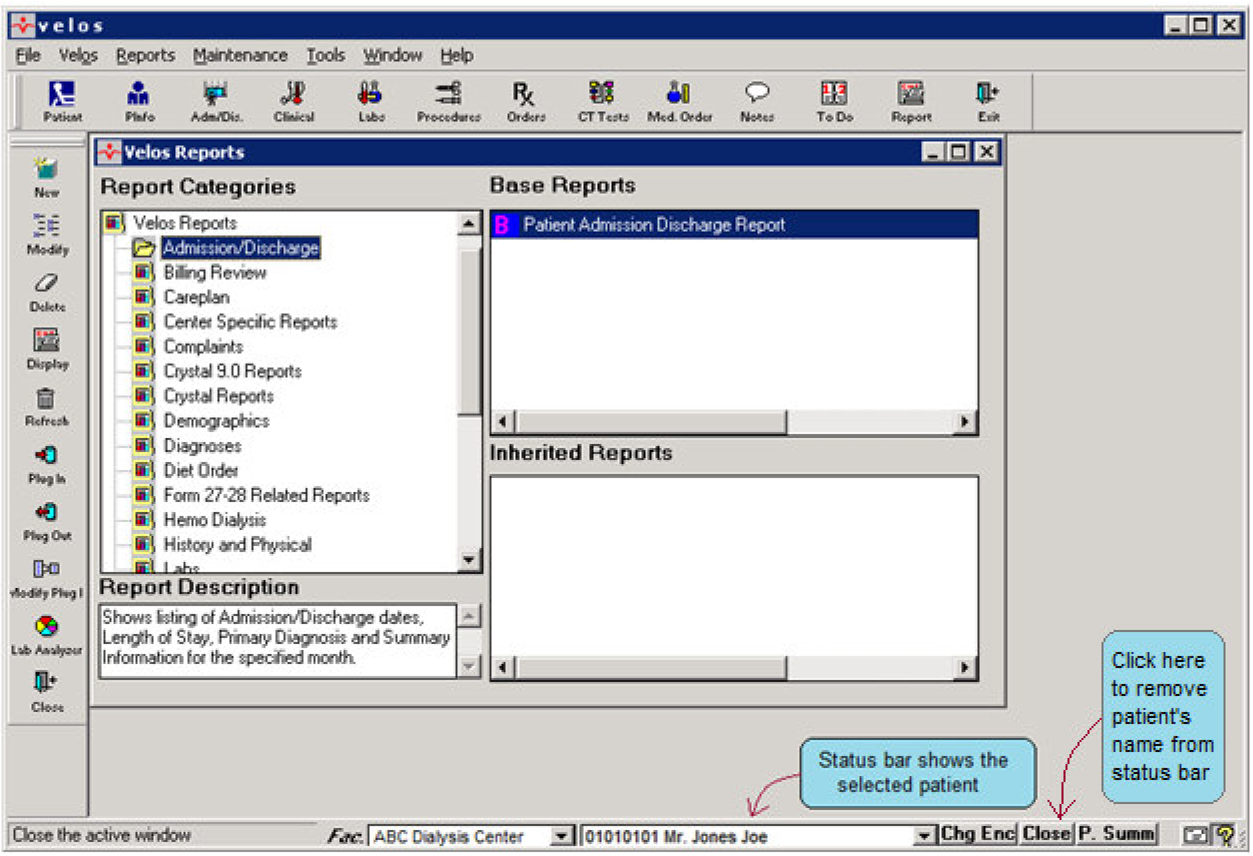

Figure 2: Selected Patient Shown in Status Bar

To run the report for all patients, make sure no patients are selected. To remove a patient's name from the status bar, click the Close button, as shown in Figure 2. Make sure you check the status bar before you run the report, because you may still have a patient selected even if you have closed the windows showing his/her records.

Crystal reports can be a very useful tool for creating custom reports. However, since they are designed outside of the Velos software's framework, they are not able to read the data regarding which patients are selected in Velos. Therefore, when running crystal reports, you do not need to worry about selecting or de-selecting particular patients.

Running a Report

Once you have selected the category of report and then the specific report you would like to run, you can open the report in two ways: either double-click on the name of the report in the window, or single click on the report name to highlight your choice, and then click on the **Display** icon on the left toolbar. Once you have done this, you will usually see a **Report Inputs** window, shown in Figure 2. This window will ask you to determine criteria for what will be included in the report. Depending on the report you have chosen, you may need to enter more or less information, but most reports require you to choose a Patient Status and Facility.

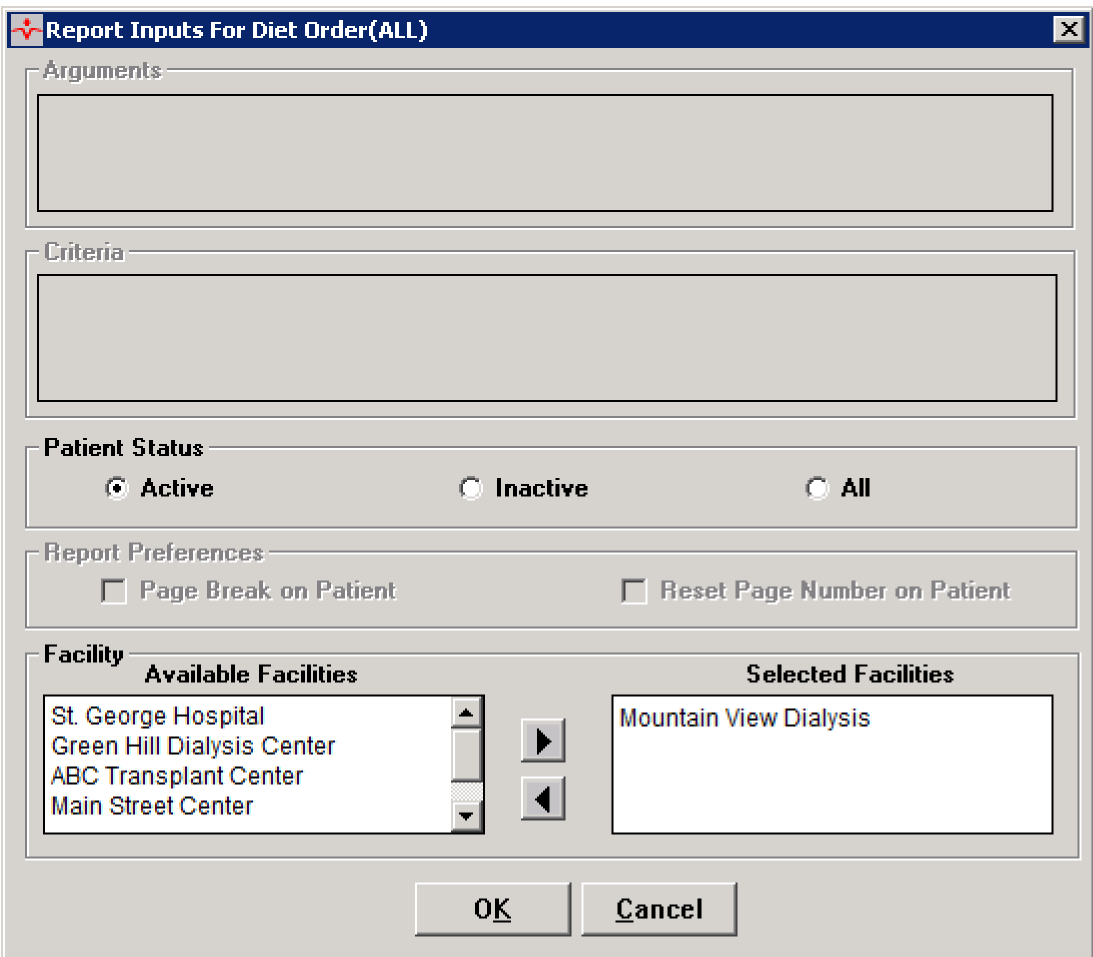

Figure 3: Report Inputs Window

As you can see in Figure 3, you will determine which patients are included in the report by clicking on the radio button next to your choice. The report will only include data about patients which are classified as **Active** or **Inactive** if you choose one of those options. If you choose **All**, all patients will be included in the report regardless of the status they have been assigned.

You will also select which facility or facilities you would like to include in the report. Only patients registered to the selected facilities will have their records included in the report. To move a facility's name from the **Available Facilities** box to the **Selected Facilities** box, or vice versa, you can highlight the facility by clicking on it, and then click on the arrow to move it. Alternatively, you can drag and drop names from one box to the other. In the example in Figure 3, the user is printing a Diet Order report. This report will only include diet orders for active patients registered at the Mountain View Dialysis facility.

Once you have made your selections, click **OK** to generate the report.

Report Layout and Controls

Almost all Velos reports have a standard layout, with the name, address, and phone number of your organization at the top as a header, and the date the report was printed as well as the page number and total number of pages in the footer. Underneath the header, the report title is usually displayed, followed by a summary of what you specified in the Report Inputs window. For example, the report would read "(Facility IN (Mountain View Dialysis)) AND (Patient Status = Active)" if you had run the Diet Order report as shown in Figure 3.

The controls on the left toolbar will be easy to understand for any user already familiar with Velos. Here is a summary of what each icon will allow you to do.

Save As: Allows you to choose a location on your computer and a specific format, and save the report as a text file.

Page Up: Moves the screen to the previous page.

Page Down: Moves the screen to the next page.

First Page: Moves the screen to the first page.

Last Page: Moves the screen to the last page.

Go To: Allows you to specify a page number and moves the screen to that page.

Zoom: Will let you adjust the size of the report on the screen so you can see more of it at once (by zooming out) or make the writing larger and easier to read (by zooming in).

Print: Allows the user to select a printer and print the report.

Close: Closes the report.

Base Reports vs. Inherited Reports

Base Reports

Base reports are the standard reports which come with the software. These reports can be seen and used by anyone logged into Velos. It is possible to create a new base report or modify an existing one, but it is a more complicated process than creating an inherited report. It is recommended that you create an inherited report for any special uses or modifications that you want to apply to a report. However, if you need to make modifications to a base report that you want more than one user to have access to, you may need to create a copy of that base report and modify that. This will mean your modifications will be listed under the base reports as a separate report that other users can access.

It is **not** recommended that you modify an existing base report and save the changes. This will affect the report for all users, and some users may need to use the report the way it was originally.

Inherited Reports

These reports are relatively simple to create and access. They are basically copies of base reports that are specific to the user. They can be modified in any way the user would like, without affecting any other user's reports. This is generally the recommended format for modifying reports, although this manual also explains how to create and modify base reports for the more advanced users.

These reports will only show up in Velos when the user who created them is logged in. This means that if someone else has logged into Velos and you create a report you want to use, the next time you log in with your own username and password, the report will not show up. Make sure the correct user is logged in when setting up an inherited report.

Creating Inherited Reports

To create an inherited report, you must first decide which report you want to modify. Highlight your choice in the "Base Reports" window and click the **New** button on the left toolbar. This is shown in Figure 4 below.

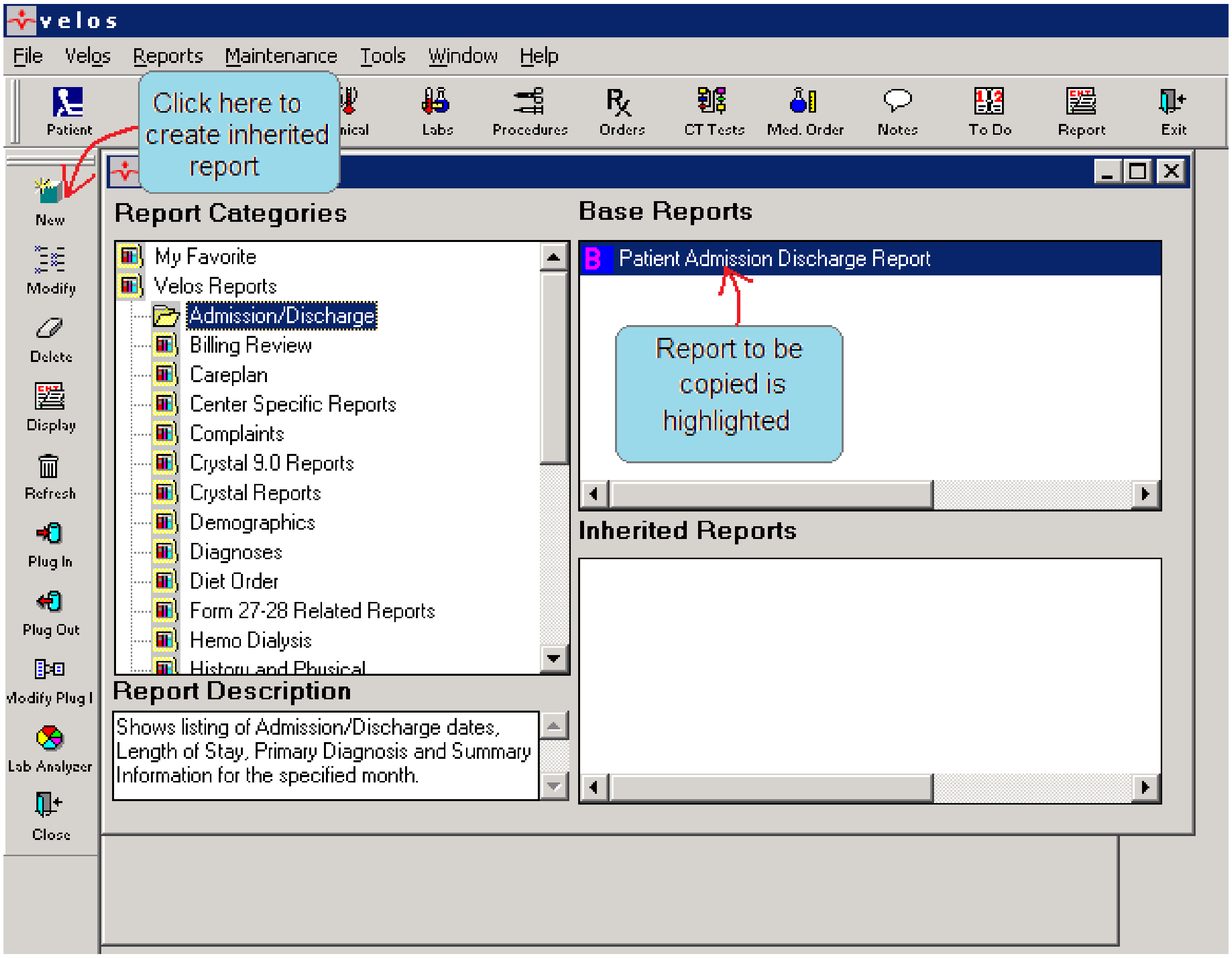

Figure 4: Creating an Inherited Report

Once you click **New**, the **New Report Inherited** window will open, shown below in Figure 5. Here you will be able to change the name and description of the report if you wish. Next, click **Save** on the toolbar. You will now be able to make modifications to this inherited report to customize it to fit your needs. See the "Modifying a Report" section in this manual for detailed instructions on doing this.

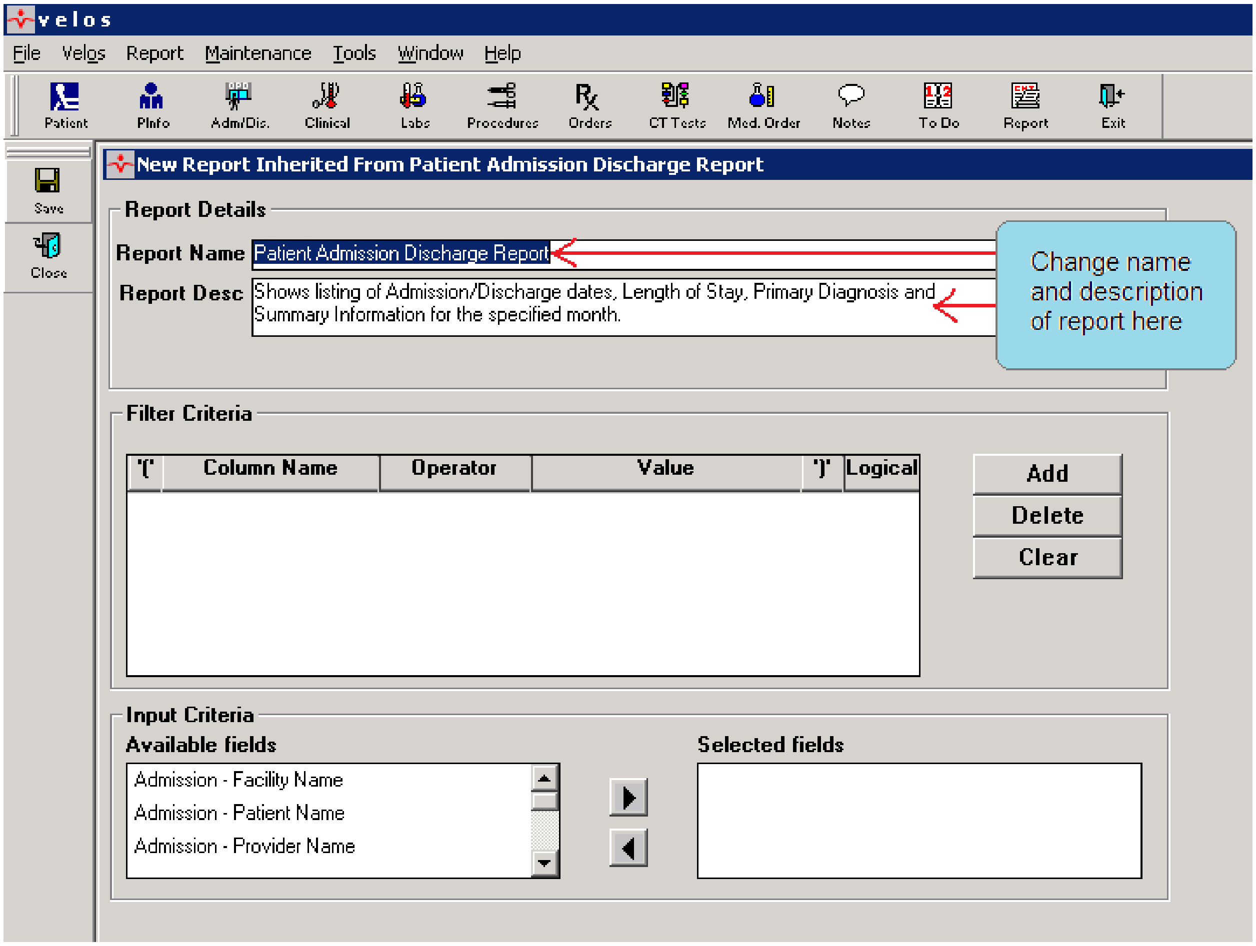

Figure 5: New Report Inherited Window

Creating Base Reports

Background Information

Although it is usually recommended that users customize inherited reports, in some cases an administrator may want to set up a new or modified base report that all users can access. Whenever you decide to create a modified base report, you need to first make a copy of that report. You can then make changes to your copy and leave the original report unchanged. Again, it is **not** recommended that you save any modifications to original base reports. These changes will apply to all users and can cause them to be unable to access the data they need. For example, a dietician may want to modify a lab report to only show data from tests relating to the patient's nutrition. However, a doctor or nurse may need to see all lab results, and will be unable to see all the necessary data if the dietician has limited the report to suit his/her needs only. In situations like this, the dietician can copy the report he/she wants to modify and then create a personalized "Dietician Lab Report." Making this a base report will allow other users to access it—in a multi-facility organization, for example, there will be several dieticians who each will want to use this new report.

Creating a Copy of a Base Report

There are several steps to creating a copy of a report. These steps are outlined below, along with figures illustrating exactly how to do each step.

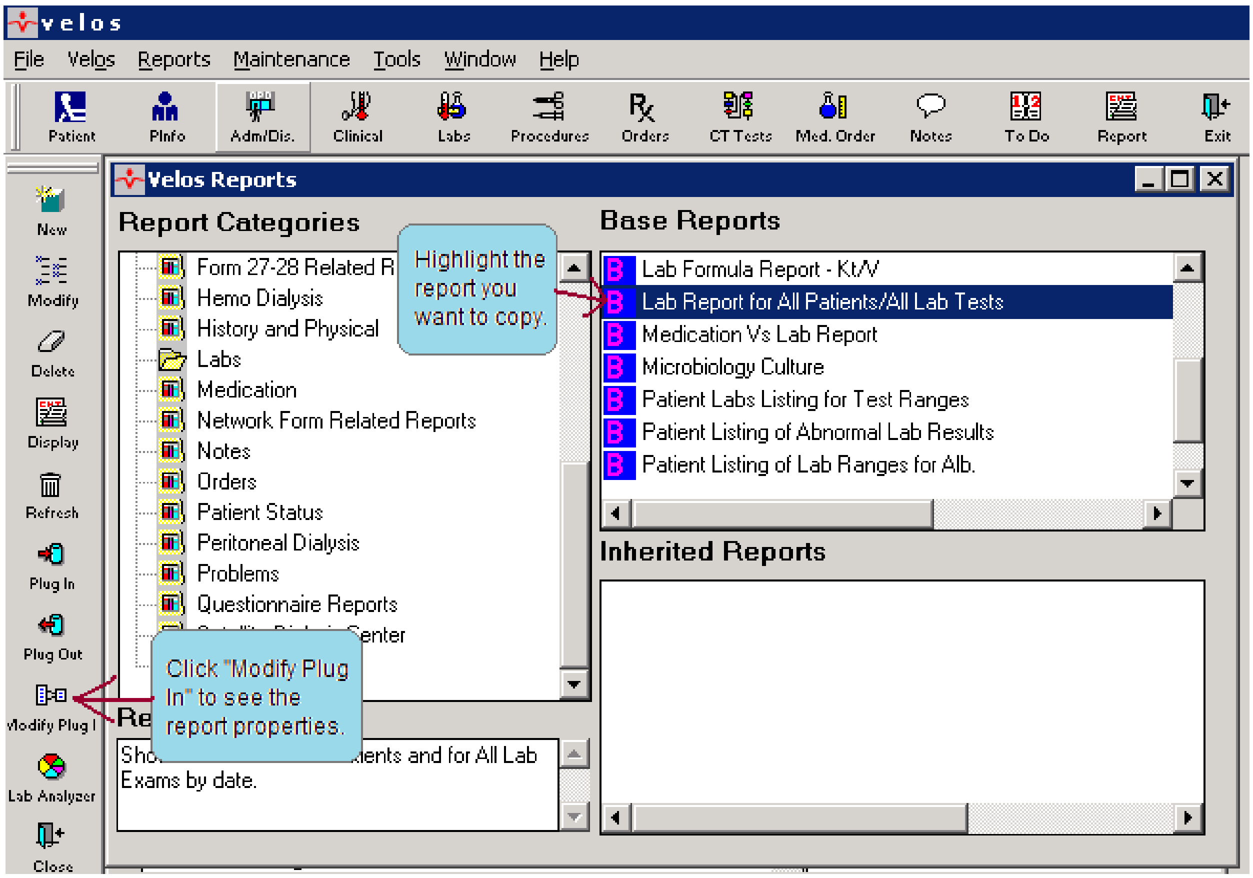

Figure 6: Making a Copy of a Report, Step 1

Step 1: Highlight the report you would like to copy. Click the “Modify Plug In” icon on the left toolbar. This will open a window displaying the report’s properties.

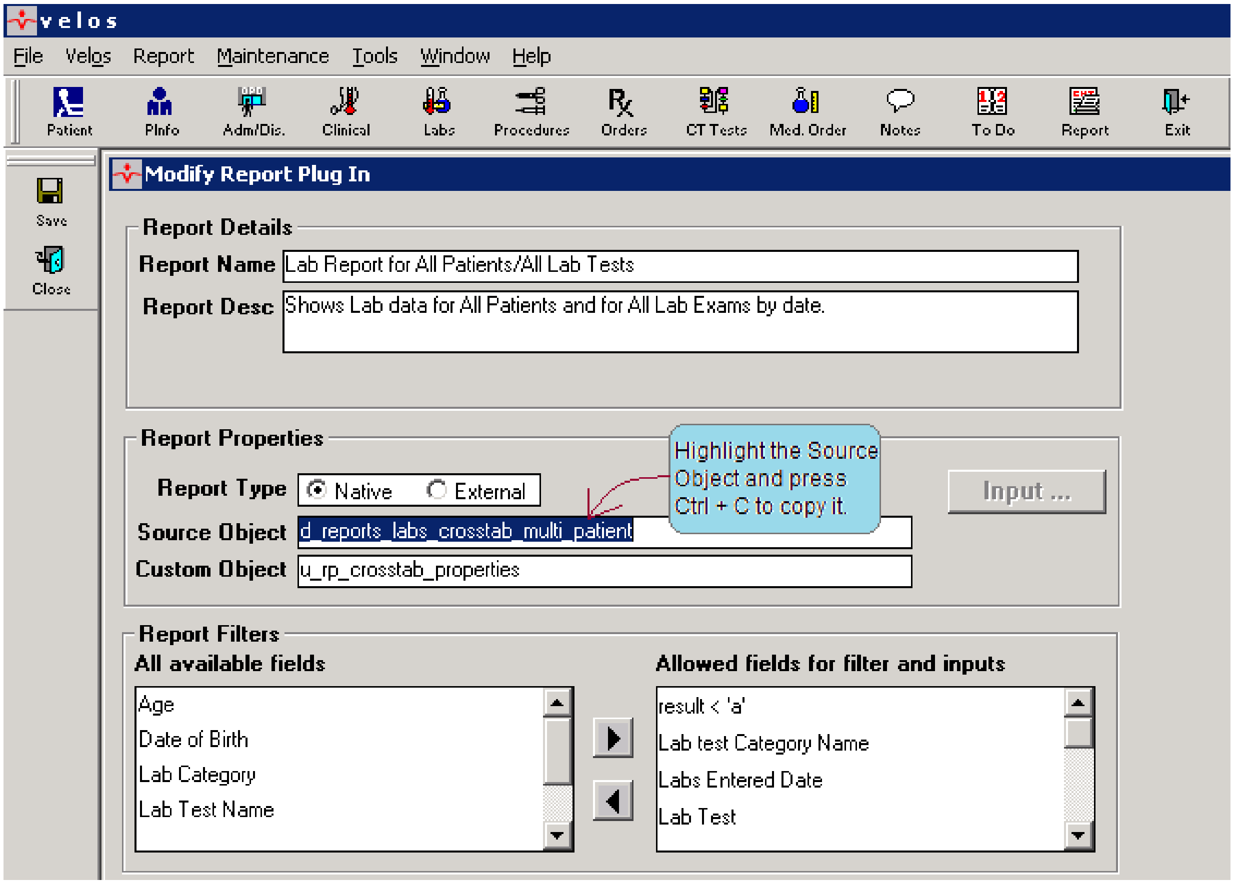

Figure 7: Making a Copy of a Report, Step 2

Step 2: From the **Modify Report Plug In** window, you will need to copy the **Source Object** of the report. Do this by highlighting the text in the corresponding field, holding down the **Ctrl** button on your keyboard, and pressing the **C** key. After doing this, **Close** this window. Do not save any changes here or it will affect the original report.

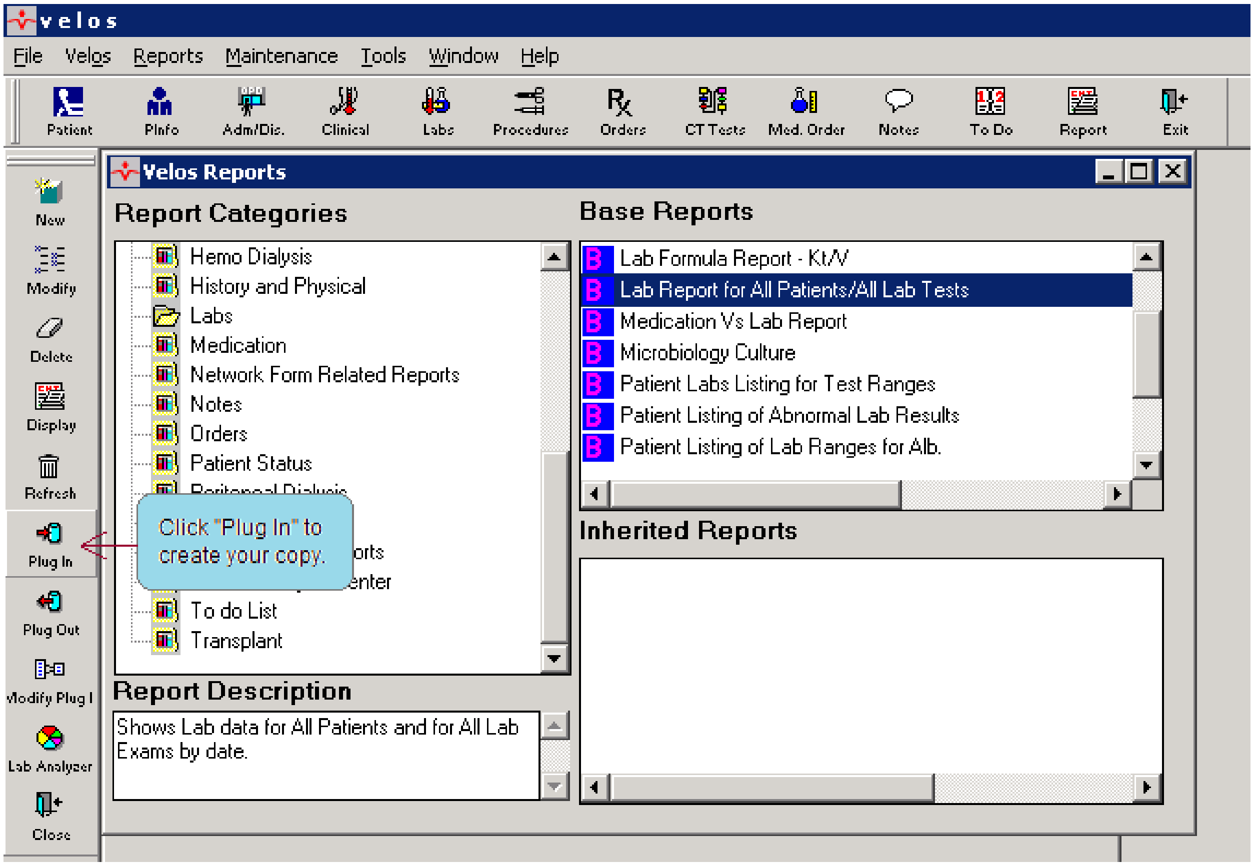

Figure 8: Making a Copy of a Report, Step 3

Step 3: Click the "Plug In" icon to start creating your copy of the report. You will see a window similar to the **Modify Report Plug In** window, but all the fields will be blank. This is where you will create your new report.

Step 4: Type in a name for the report. It must be different than the name of the original report. You may also enter a description for the report. Although this is not required, it will help other users identify what your report will do. To continue the example mentioned above, we will create a "Dietician Lab Report." This is just an example, but you can make any kind of specialized report you would like by following the same procedure.

Step 5: Paste the **Source Object** of the original report into the corresponding field for the new report. Click in the blank field and then hold down the **Ctrl** key and press **V**. The source object information that you copied from the original report will appear here.

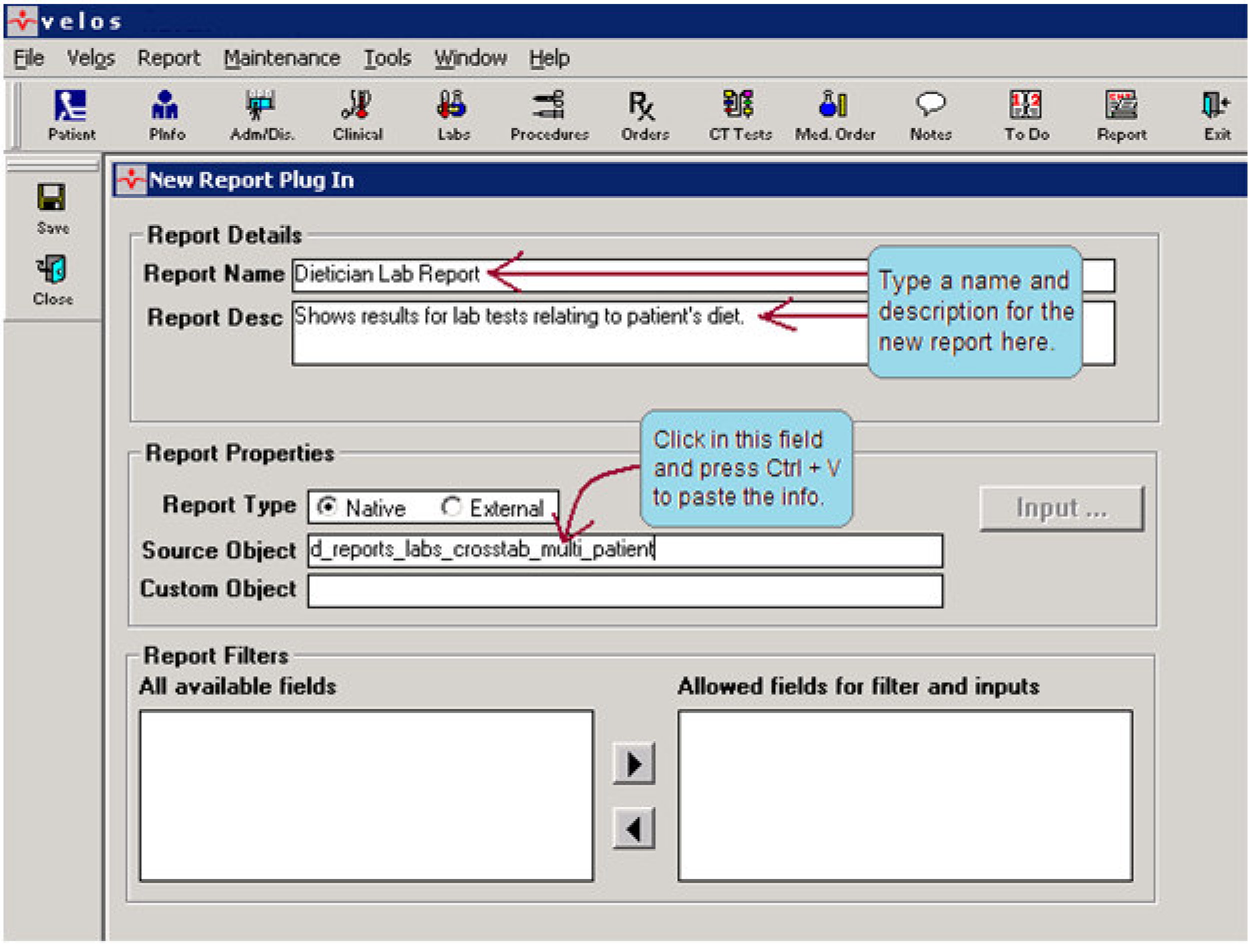

Figure 9: Making a Copy of a Report, Steps 4 and 5

Step 6: Once you have pasted the Source Object into the field, click in the next field or press the **Tab** key. This will cause a list of fields to appear in the **All available fields** box. You will then have to select which fields you want to use when selecting criteria for your report. For example, if you are planning to modify a report so that it will only show information for patients over 60 years of age, you would need to move **Age** from the available fields to the **Allowed fields for filter and inputs** box. In our example, we are planning to select criteria based on which lab test was conducted, so we have moved **Lab test** and **Lab performed date** into the allowed fields. Don't worry if you miss a field that you want to use later; you can always come back and change the selected fields.

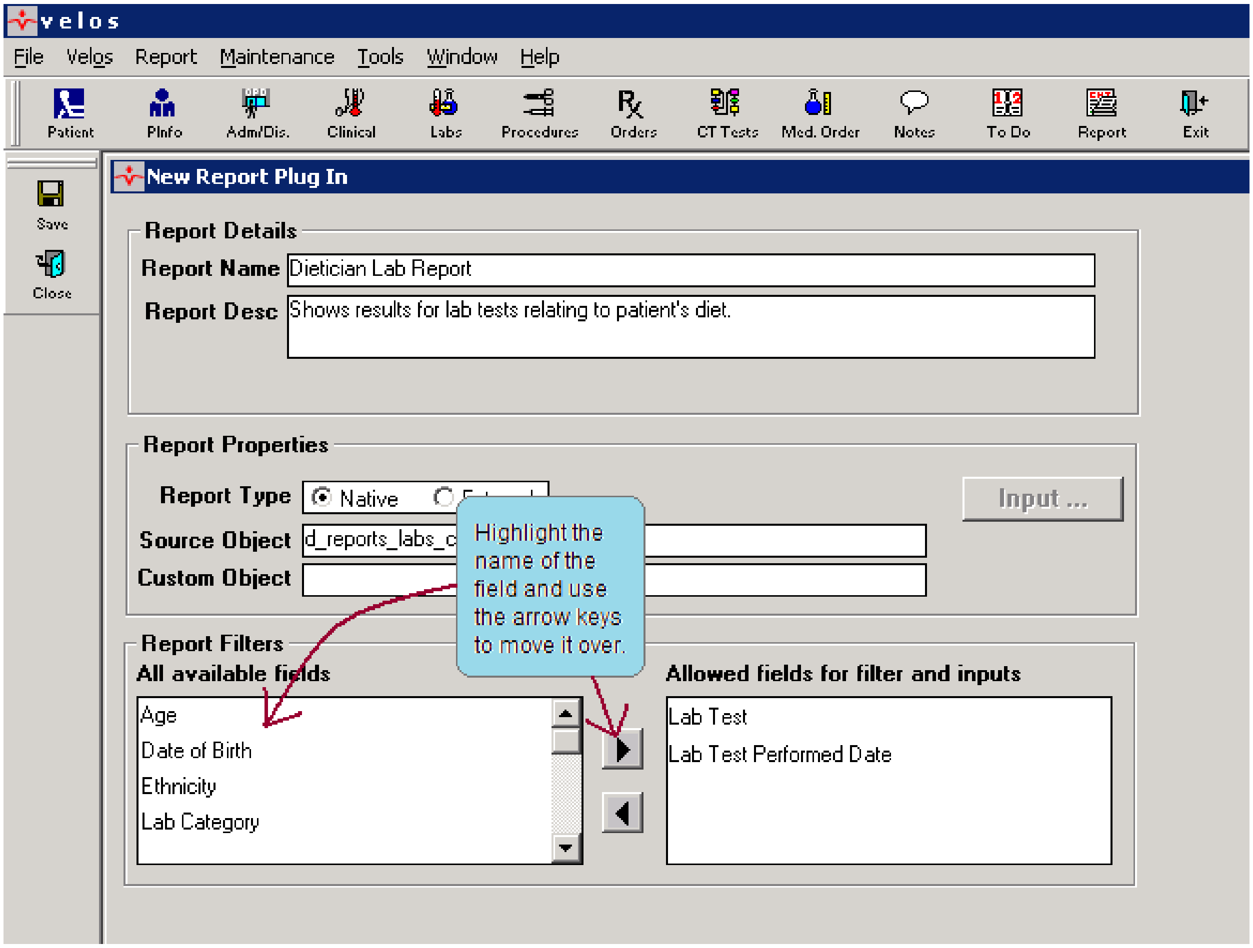

Figure 10: Making a Copy of a Report: Step 6

Step 7: Click the **Save** icon on the left toolbar, and then click **Close**. You have now completed making the copy of the report and will be able to modify this new report to suit your needs, without changing the original report. The new report you have created will appear in the category that was highlighted when you clicked “Plug In.” If you followed these steps, it should be the same category as the original report you copied.

Modifying a Report

Making Modifications

If you have followed the steps above, you now have a copy of the base report you want to modify and you are ready to start making changes. Or, you may have created an inherited report and are ready to customize it. To get started, find your copied report in the Reports browser and click “Modify” on the left toolbar. This will open up the **Modify Report** window.

Figure 11 shows how to open a copied base report. If you are opening an inherited report, it will be located in the lower window.

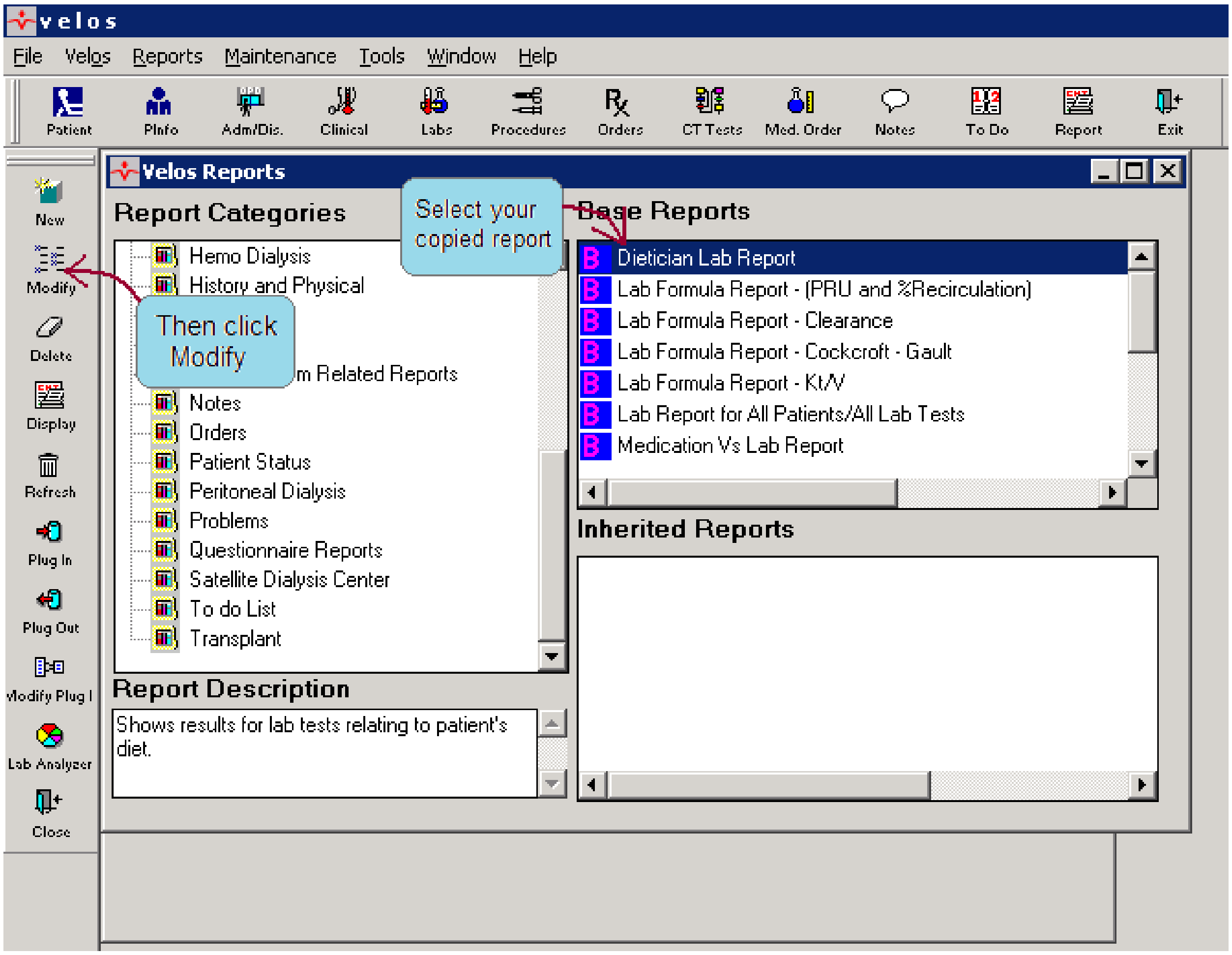

Figure 11: Modifying a Copied Report

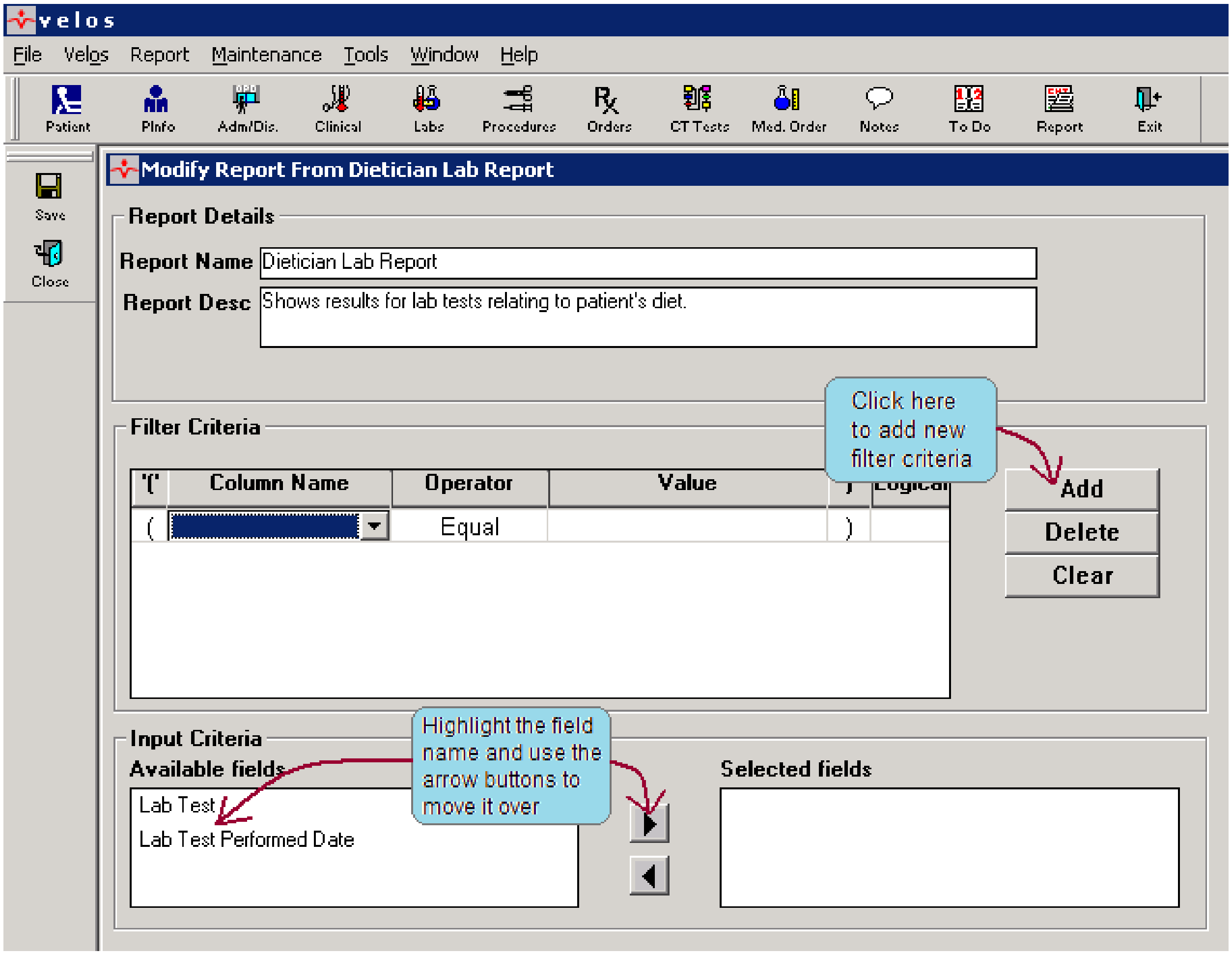

Figure 12: Modify Reports window

Using the Modify Report window, you will be able to specify **Filter Criteria** and **Input Criteria**. These two types of criteria work the same way when determining what data to include on the report. The difference is that **Filter Criteria** will be determined here, in the **Modify Report** window, and will be applied to the report automatically each time it is run. Input Criteria, on the other hand, will have to be specified each time someone runs the report. If you always want to see the same data, it is better to set it up as filter criteria. If the value of the criteria will be changing often, you will want to set it up as input criteria.

For example, in our dietician report, we always want to see results for the same lab tests. We will set up these tests in the filter criteria so we don't have to specify them each time we run the report. However, the dietician may want to see only this month's data—in other words, using the date of the lab test as criteria. This will be changing each month, since she will always want to see the current month's data. This means that we will set up the date of the lab test as input criteria. She will have to put in the current date each time she runs the report.

Only fields which you selected when creating the copy of the report will be available to choose as input filters and input criteria. If you do not see a field you need to use, you can go back to the screen shown in Figure 10 by closing this window and then clicking “Modify Plug In” on the left toolbar. Here you will be able to add fields. When you are done, **Save** your changes and return to the **Modify Report** window.

To set up input criteria, all you need to do is move the name of the field from the **Available fields** box to the **Selected fields** box, using the arrow buttons. You can see that in Figure 13, the user has already done this.

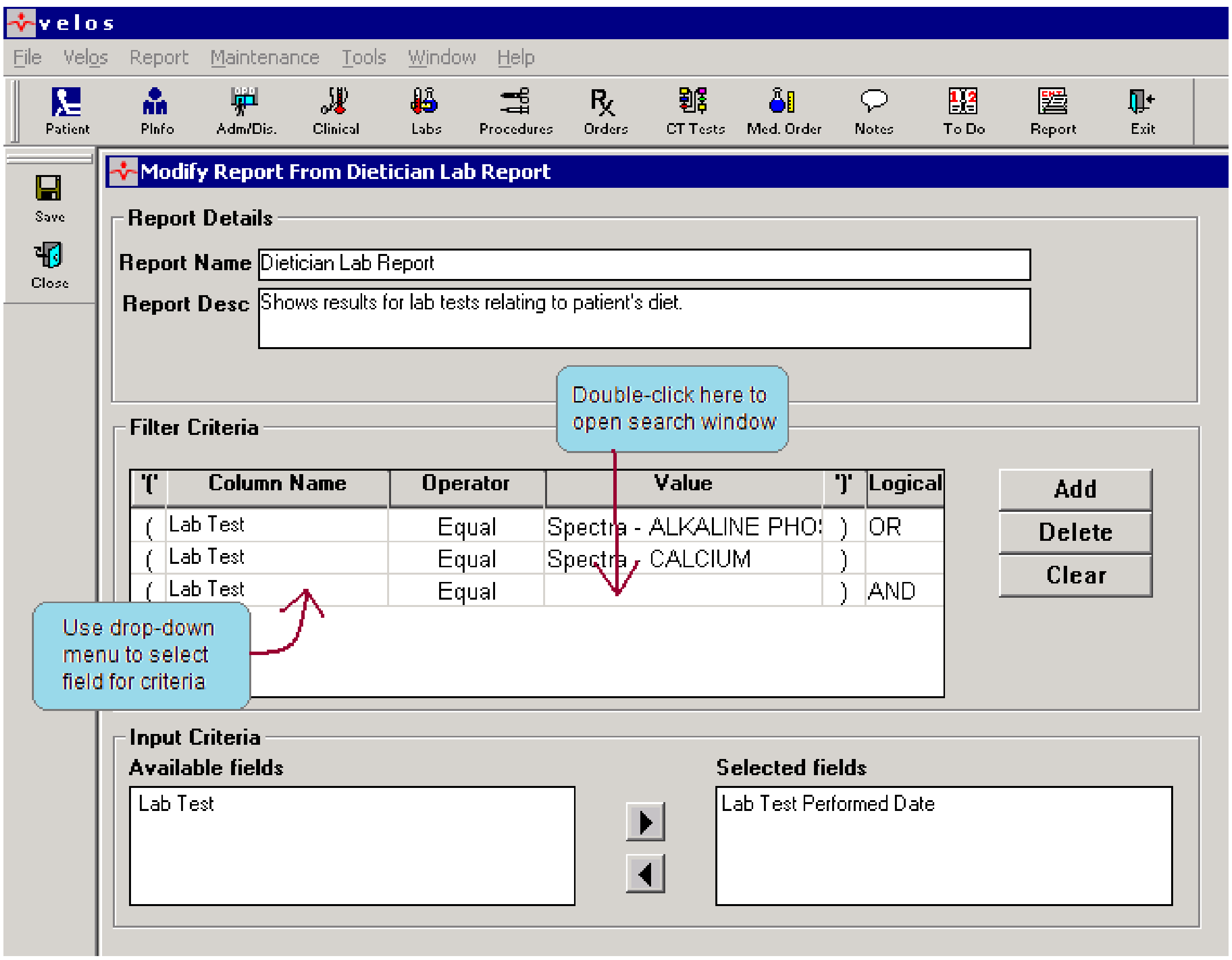

Figure 13: Setting up Criteria for a Report

Next, you will need to set up any filter criteria you wish to be applied every time you run the report. To add a row in the **Filter Criteria** section, click the **Add** button on the right. This will produce one row which you can fill in using the method described below. You can use the **Add** button as many times as you wish to create any more rows you need. You can also click the **Delete** button to remove any unwanted rows, or the **Clear** button to remove all the criteria.

To fill in the rows in this section, start by choosing the field from the drop-down menu under the **Column Name** heading. Depending on the criteria you want to add, you may also need to change the **Operator** using the corresponding drop-down menu. In the example shown in Figure 13, the user is specifying particular lab tests, so he/she used the equals sign. For other reports, you may need to use a different operator. An example of this would be if you want to run a report which only includes patients over 60 years of age. For this, you would enter “Age” in the **Column Name**, use the **Greater** operator, and enter “60” as the value.

Next, you will need to enter a value for the chosen field. In the lab test example, the user is choosing the names of the lab tests that he/she wants to see data from on the report. To choose the value for the lab test field, double-click on the blank field. This will open the **Search Window**, shown in Figure 14.

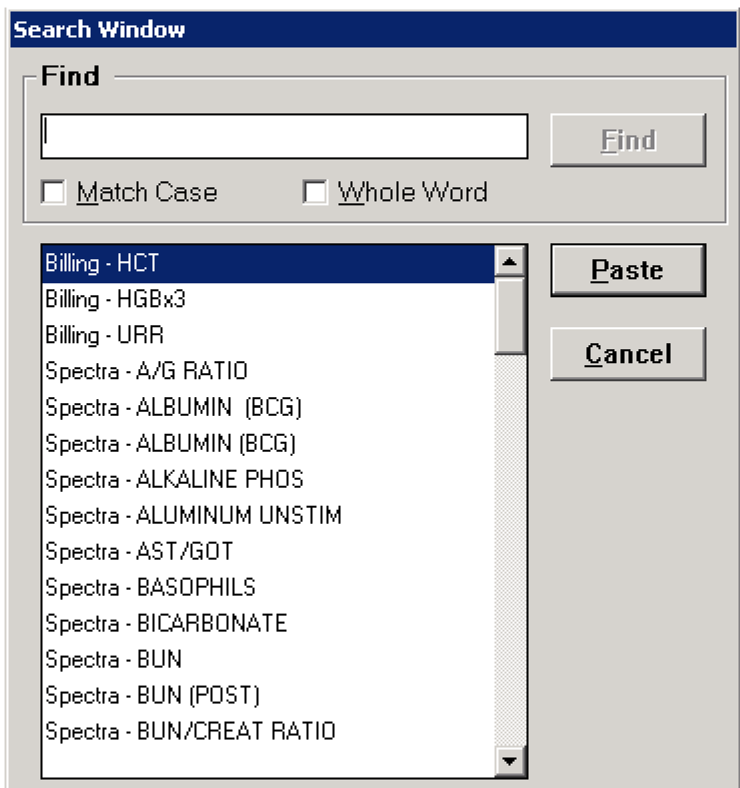

Figure 14: Search Window for Defining Filter Criteria

This window lets you choose the value to include in your criteria. You can search for a particular item by typing it under the **Find** heading and clicking the **Find** button, or by scrolling down and finding it on the list yourself. Double-click on your choice or highlight it and click **Paste** to enter it into the value field in the previous window.

Finally, you will need to choose either "AND" or "OR" from the **Logical** drop-down menu. Choose "AND" if you only want to see results that fit all your criteria. Otherwise, choose "OR." For example, the report in Figure 15 used "OR" because the user wanted to see lab test results for any of the following tests. If the user had chosen "AND," the report would only include patients' records on the report if they had values for all of the chosen lab tests. This means that if a patient had results for five of the six selected lab tests, but for some reason did not have results for the sixth, none of the results at all would appear on the test. Choosing "OR" ensures that any results for any of these tests will appear on the report.

Figure 15 shows the completed modifications made to set up the lab report for the dietician.

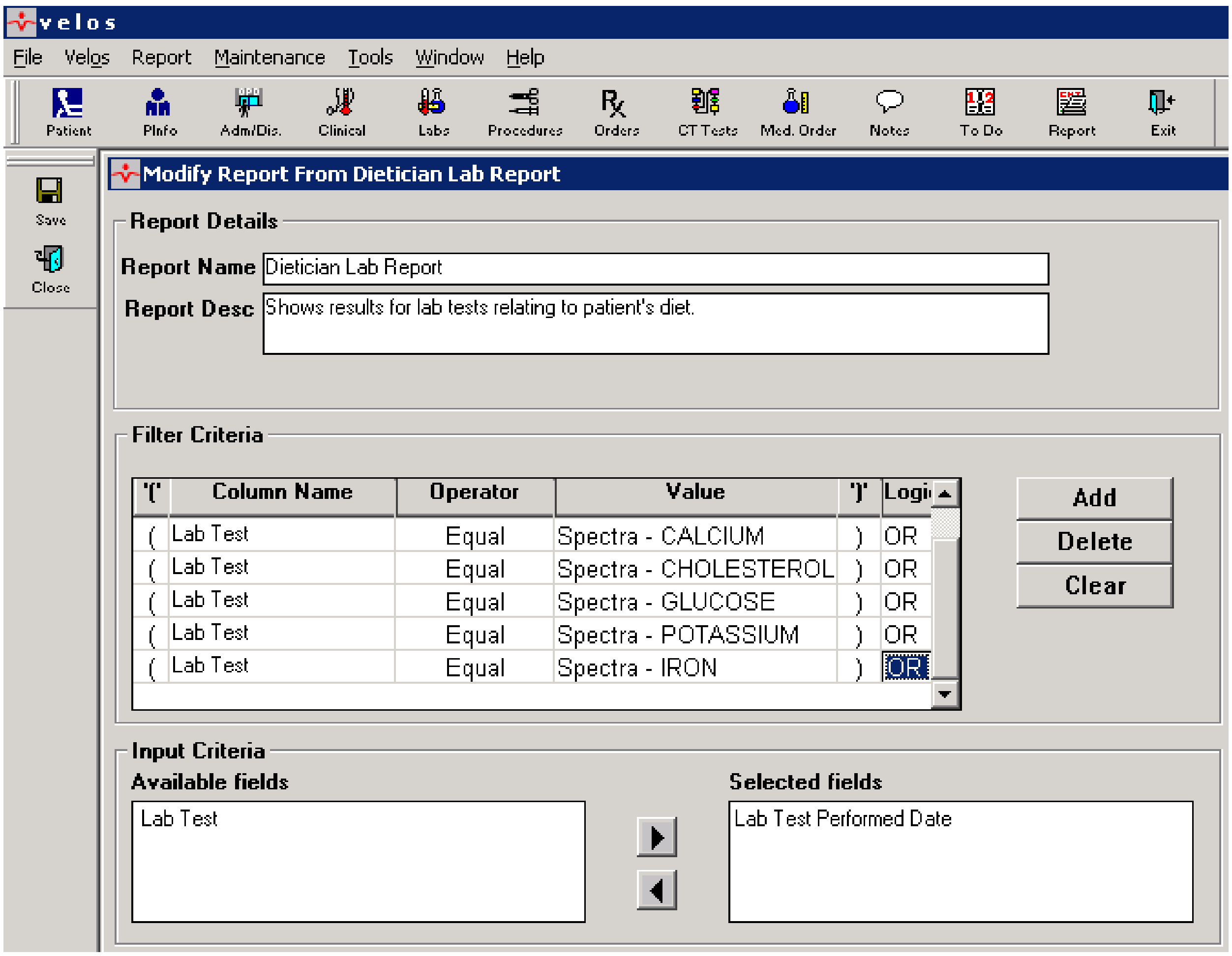

Figure 15: Example of a Modified Report

When you have finished defining the criteria you want to apply to the report, click **Save** on the left toolbar and then **Close**. You will now be able to run your modified report.

Running a Modified Report

If you have chosen to include input criteria, you will need to enter this each time you run the report. On the example described here, the user set up "Lab Test Performed Date" as input criteria. When a user runs the report, they will have to enter the date in the Report Inputs window. This is shown in Figure 16. The user has selected to see results dated on or after January 1st, 2008.

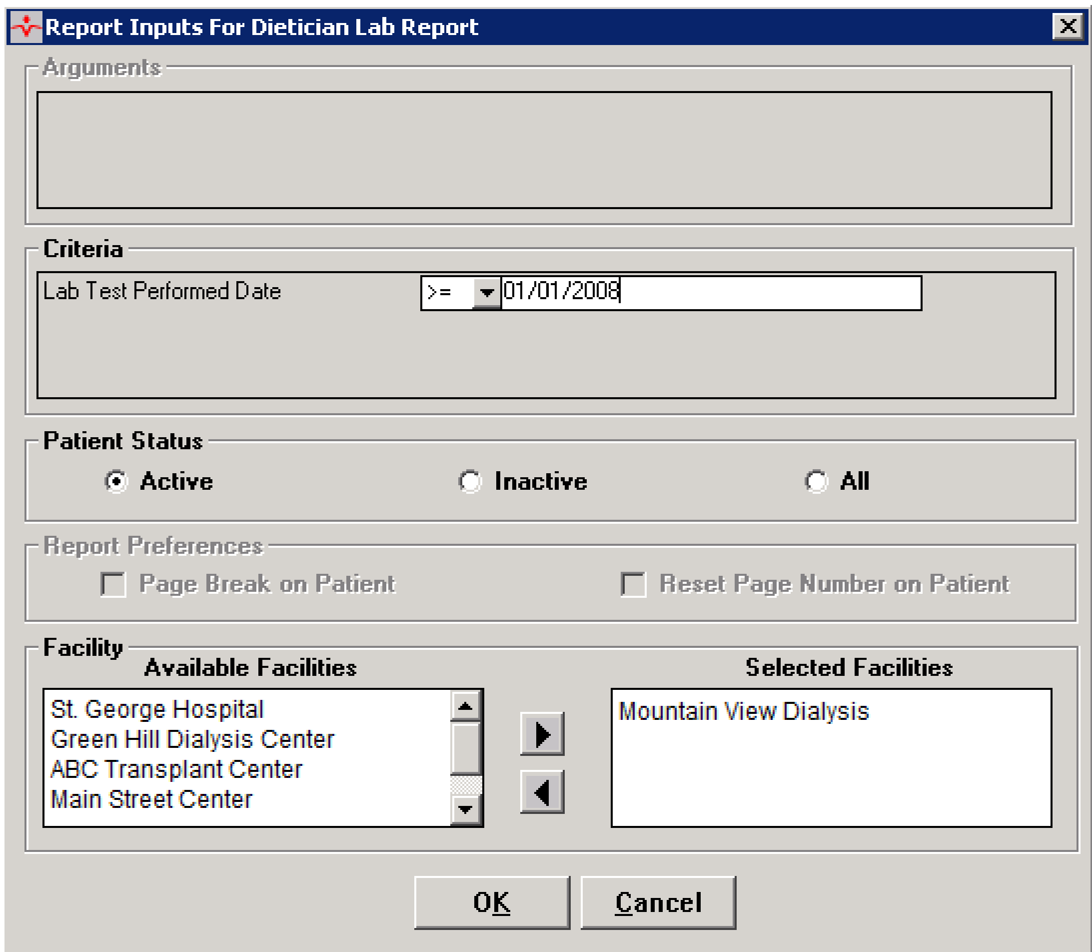

Figure 16: Example of Input Criteria

Adding Advanced Search Filters

Adding a Filter to a Report

Another way you can customize your inherited reports to help you find the information you need is by adding Advanced Search filters to the report. You can also add these filters to base reports by following the instructions below, but again, this is not recommended as these changes will affect all users and may prevent others from obtaining the data they need.

The first step is to choose the report you to which you will be applying the filter. If you want to keep the original report as well as the version with the filter, you may have to make a copy of the report and change the name and description to reflect the purpose of the new report. Once you are ready to add a filter, highlight the report in the **Velos Reports** browser and click the **Modify** button on the left toolbar. You will see the **Modify Report** window, which you should be familiar with already if you have read all instructions in this manual. Here you will see an **Adv Search** button located underneath the **Clear** button on the right side of the window. Refer to Figure 17 for an illustration of this.

If the **Adv Search** button does not appear on your screen, it may be disabled in your control table. Please contact your support representative who can enable this feature for you.

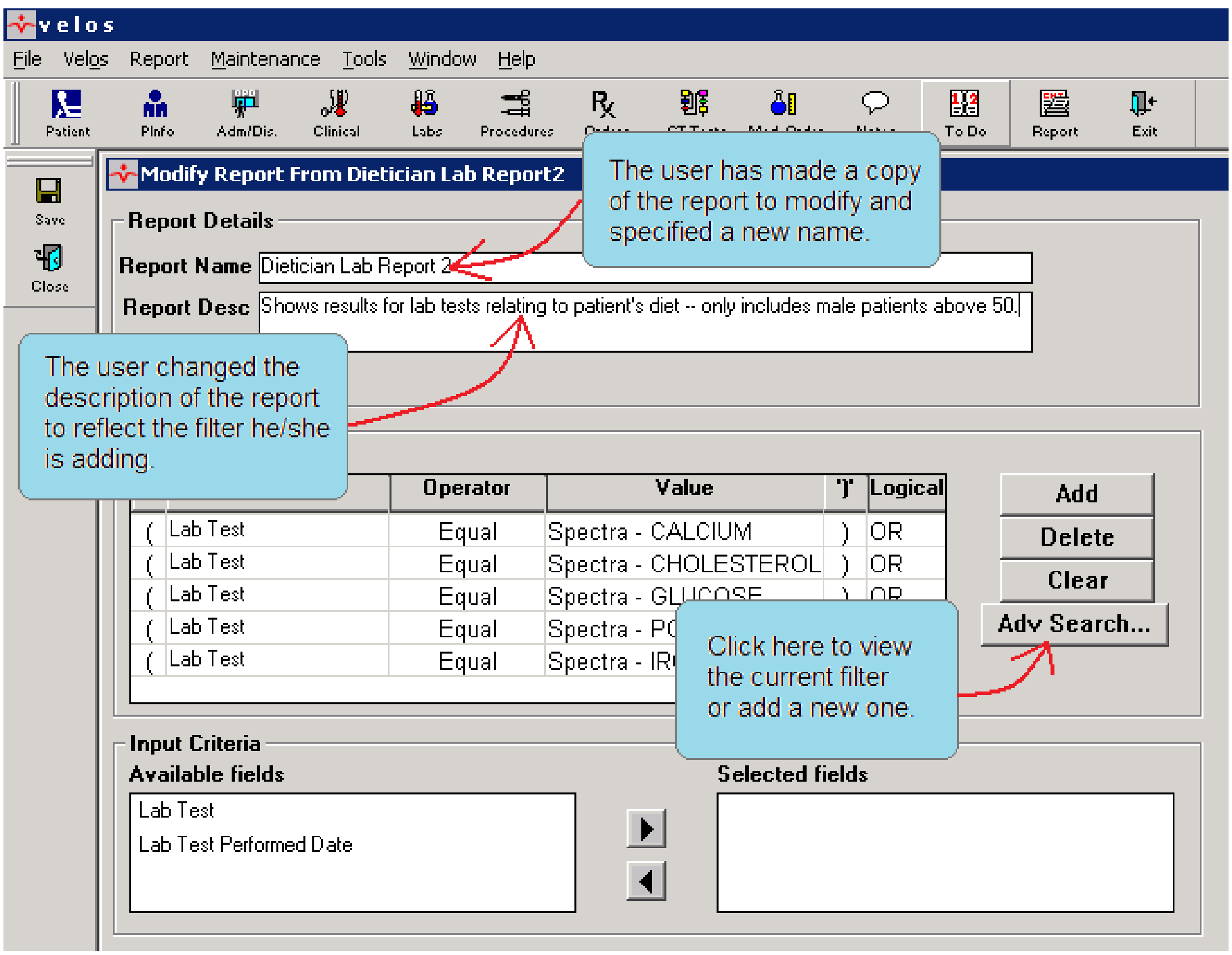

Figure 17: Adding an Advanced Search Filter to a Report

Once you click **Adv Search**, the **Patient Filter** window will appear, shown in Figure 18 below. This will show the filter already applied to the report, if there is one. To apply a filter, click the **Select** button.

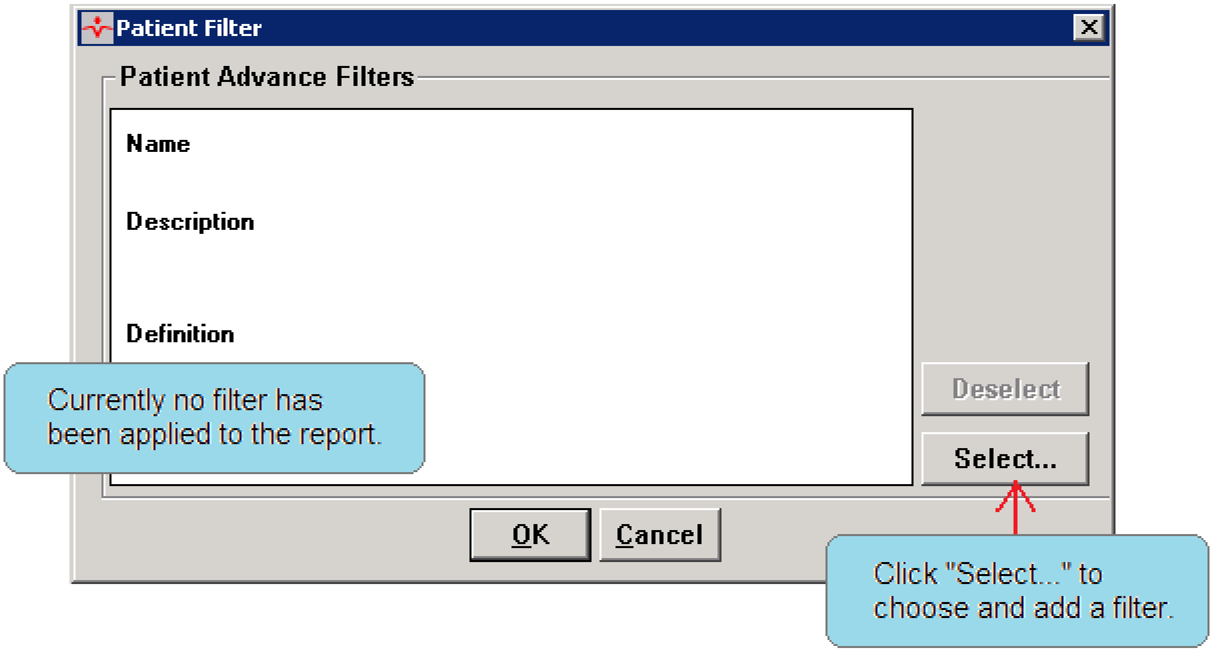

Figure 18: Viewing and Adding a Filter to a Report

This will open the **Patient Filter** selection window, shown in Figure 19. This window shows the names, definitions, and descriptions of all existing filters. Highlight the filter you would like to use, and click OK. If you do not see a filter with the criteria you are looking for, you can create a new filter, as explained in the following section.

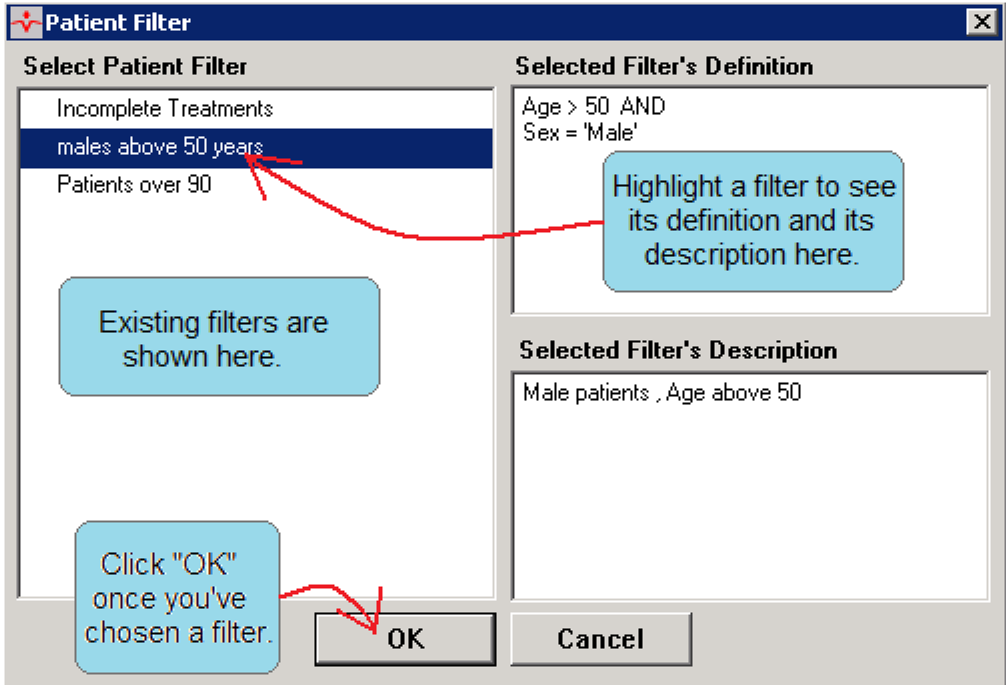

Figure 19: Selecting a Filter

Once you select a filter, you will be brought back to the previous window, which will now display the filter you have chosen. You can click **Deselect** now if you have chosen the wrong filter, or later if you decide to remove the filter from the report. Click OK to confirm the application of the filter to the report.

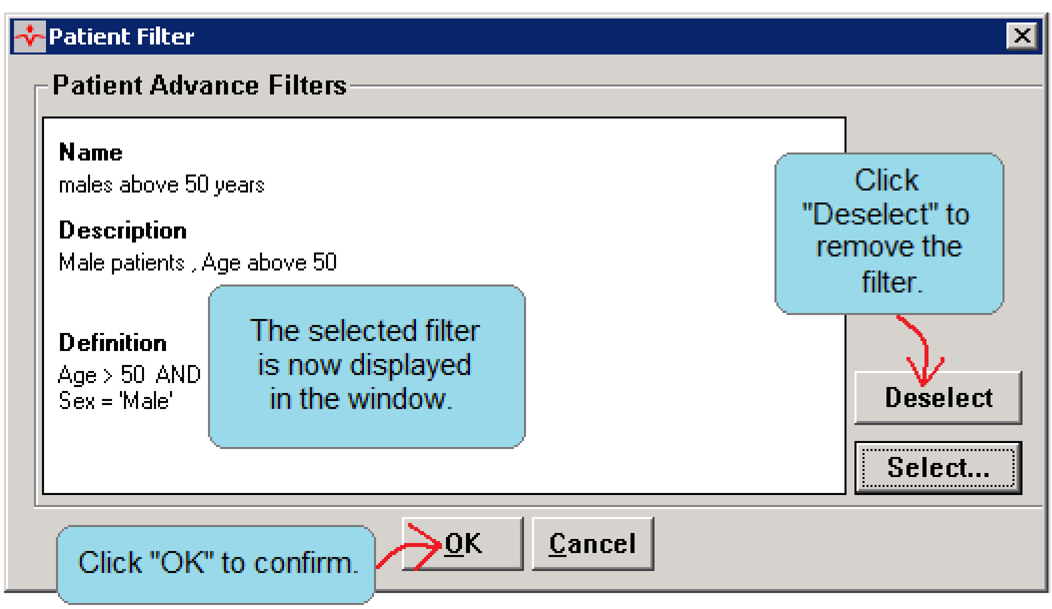

Figure 20: Patient Filter Window.

This will bring you back to the **Modify Report** window. Next, click **Save** on the left toolbar to finalize your changes. You can then **Close** this window and the report will apply the filter whenever you run it.

Creating New Filters

Only one filter can be applied to a report at one time. This is because one single filter may have as many different requirements as you wish. For example, if there is an existing filter to find patients that have Medicare as primary insurance and there is a separate filter to find patients that are female, and you want to apply both of these filters, you will not be able to. However, if you want the report to only show patients who are both female and have Medicare, you can create a new filter that has both of these requirements, and apply that one.

You can also create a new filter specifically for the purpose of using it on a report, with any criteria you wish. To create filters, you will have to go to the **Patient Search** screen, click **Adv. Search** on the toolbar, and then click **New Filter**. This process is explained in detail in the Velos Core Operations Manual, in both sections 4.14.2 and 5.1.3.

Deleting Reports

If you no longer use an inherited report, you can delete it by highlighting it and clicking on the **Delete** icon on the left toolbar. Make sure that you are certain you do not want the report anymore, because once it is deleted, you will not be able to get it back. You can re-create an inherited report that was deleted accidentally by following the same steps that you used to set it up in the first place.

For base reports, you will not be able to use the delete icon. However, if you are **absolutely certain** that you no longer want a certain base report, you can “**Plug Out**” the report using the corresponding icon. This will permanently remove the base report from your system. Make sure you have approval from your administrator or whoever is in charge at your organization before doing this, as it will affect all users.