

## NECS Clinical Systems Specialist Team

# SystemOne Reporting Anchor Dates

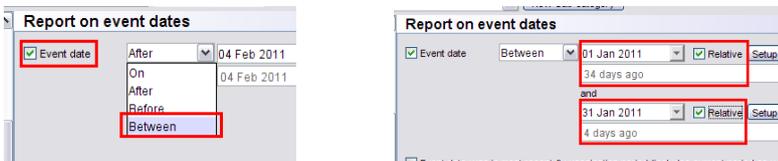
### Setting Up Reporting Anchor Dates

Instead of creating a report and putting an absolute event date range for the previous month or the last 4 weeks, it is possible to set up the date range to always use the previous calendar month, regardless of when the report is run.

1. Click on **Event Dates** within the **Clinical** folder.



2. Tick the **Event Date** box and select **Between** from the drop down menu.



3. Enter the first day of the previous month in the top date box and put the last day of the previous month in the bottom date box. Also make sure that both **Relative** boxes have been ticked.

**NB.** As it stands, this report will now run relatively to today's date and will always report on events dated 34 days ago to 4 days ago.

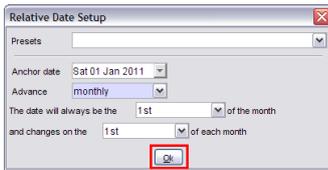
4. To ensure that the report always chooses the whole of the previous calendar month we need to setup some anchor dates. Click the top **Setup** button.



5. The anchor date pulls through the date already entered but the trick is to set the date to advance "Monthly" from the **Advance** drop down menu.



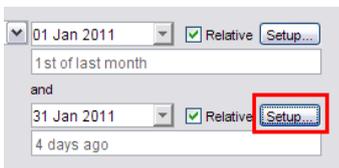
6. As you can now see, the date will always be set to the first of the month and will change on a monthly basis. Click **OK**.



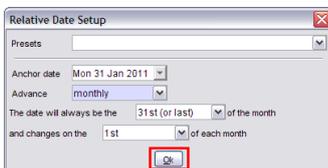
7. Instead of 34 days ago, the box now reads **1<sup>st</sup> of last month**. No matter when we run the report, this date will now always be the 1<sup>st</sup> day of the previous calendar month.



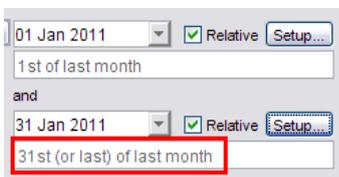
8. We can now do the same for the end date. Click the bottom **Setup** button.



9. Again, the date already entered is pulled through and you need to change the **Advance** type to "Monthly". Click **OK**.



10. Instead of 34 days ago, the box now reads **31<sup>st</sup> (or last) of last month**. No matter when we run the report, this date will now always be the last (28<sup>th</sup>, 30<sup>th</sup> or 31<sup>st</sup>) day of the previous calendar month.



11. This report can now be added to a batch to run automatically every month.