

# Case Notes

## In Focus

what's on + what's in

**PremVet5  
Updates + News**

**RoboVet3  
NEW RELEASE**

**TOP TIPS**



Vet solutions

# Better business analysis with Data Major

Not so long ago the veterinary practice computer simply stored records and generated booster reminders. Now this is only part of its job. All systems will do the basics like adding clinical notes, dispensing products and services and calculating consultation fees. The more comprehensive, like PremVet5, will provide more detailed analyses of the business which are crucial tools to monitoring performance and progress.

The latest development is Data Major which is now part of the upgraded PremVet5 system. It is a powerful tool that can handle the data and prepare it ready for analysis in a database on a nightly basis. Once in place, this data can be analysed at any stage within PremVet5.

"We increasingly find that practices are seeking to understand the physical and financial mechanics that underlie day-to-day activities," says chief executive Julian Bryan. "We have developed and implemented Data Major for our PremVet users and very similar functionality is being developed for RoboVet3 users.

"With Data Major, users can generate management information on pretty much any parameter of data stored in the system. Examples would be checking out month-by-month procedures tallied by each vet or nurse, an analysis of the client age profile, a record of new clients over time or an analysis of client profile by species."

Data Major is supplied with a whole host of reports already configured for the system. And users can also design and store their own reports with just the data they need.

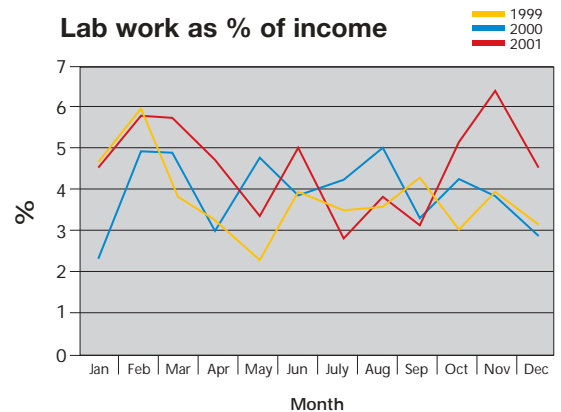
Reports can be run through any screen on the system, from the older Wyse to more modern Axel terminals. Or users can take advantage of a special 'ODBC' connection to analyse data using a PC, through the likes of Microsoft Excel, MS Query, Access or Crystal Reports. This allows information to be presented graphically for even greater impact in meetings.

Once created, reports can be stored for future use, with charts or tables being 'refreshed' from the underlying database as often as necessary.

"To take advantage of Data Major, we need to upgrade your system on the server only. As soon as this is completed, all branches will be able to use it providing the system meets the minimum operating system and hardware configuration criteria.

"We have enclosed details of current server specifications in relation to its ability to run Data Major so users can check out the servers configuration details so they can act now and take advantage of these latest developments."

For RoboVet3 users, the same functionality will be available towards the end of 2002.



## PremVet5 Health check

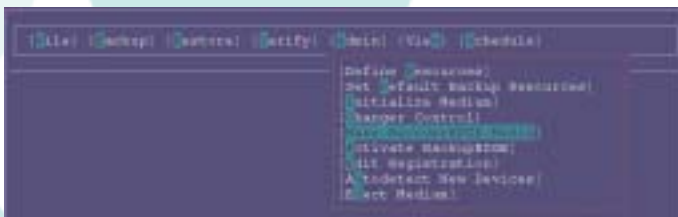
Backing up copies the information stored in your computer to some form of removable media to allow you to re-create the system should anything go wrong is essential; some of you don't! If your system fails, it will cost a considerable amount of money, lost records, time, and hassle to get your system working again. Our recommended backup software for PremVet5, Backup Edge SS, is cheap in comparison at just £300.

Laptops used at branch surgeries, hot-swap servers - these all need backing up - don't think just because you have a copy of the vet system elsewhere you can get away without it - you can't. You don't need a backup device in the laptop or hot-swap - simply use Backup Edge SS to copy the data over the network to the drive in the main computer.

*Remember*, if you are doing a software upgrade, an engineer is attending to alter or change the hardware, it's your end of year, make a separate backup before you start - just in case!

In addition to backing up, Backup Edge SS has the ability to create 'recovery disks'. These allow the system should it every fail, to be restored using a simple menu system - or directly via support staff in Edinburgh remotely. You should be generating recovery disks about twice a year - it is a simple matter of picking a menu option ie.

Login as root



- Type edgemenu
- Pick option 'A'dmin -> 'M'ake RecoverEdge Media
- Follow instructions on the screen.
- See the Backup manual for more info or ask for the FAQ from support

However, if the machine fails and you don't have these disks it's too late - the disks need to be generated in advance. 73 of you have never made these disks and 135 of you have not updated them this year. It takes about five minutes - so make yours now!

But then those of you that do have disks, can you find them and are they OK? To address this worry, the people at Microlite (the suppliers of Edge) recognise this and Backup Edge SS now has an option where the recovery disks are copied to the tape. For users with HP DDS3 or DDS4 drives, every time a backup takes place, the recovery procedure is run directly from tape, making a big difference if the system goes down. Those of you using the older version of Edge and have drives capable of the 'One Button Disaster Recovery' system should upgrade now.

Remember to swap tapes - there is no point in keeping the same tape in the drive all the time - swap tapes daily. Rotate the tapes and use one per day then start again the following week. Tapes wear out so replace your set annually.

Alternatively, if you have a CD writer on the server or one of your PCs, you can backup to that. Does your backup take ages? If so consider moving to a DDS4 drive or DVDs. The time you or your staff save waiting will quickly cover the upgrade cost.

*Monitoring your backups is one of the most important 'admin' tasks, get into the habit of checking them - If anything happens to the server - you will need them.*

The majority of RoboVet users now have DAT drives fitted to their servers just like PremVet5 users but fail to address the issue of system backup as opposed to data backup. For a similar investment, you can have backup software that would restore your system on to your server 'at the touch of a button'.

## PremVet5 Client merge

Pets often have more than one carer and it might be two or more people that bring them in to the surgery. This might mean the pet is registered more than once with a range of family or friends! What confusion!

If and when this does happen, PremVet5 can merge the two histories and get rid of the duplicate card. This is how it's done:

### How Do ...Transfer clinical histories between two cards

- Make a note of BOTH of the record card numbers
- Decide which record card number you wish to keep
- Go to the OTHER record card
- When on the management record of this card press the '&' key (above the 7 - press the shift key and 7 key at the same time).
- It will ask which record you want to transfer records TO. Enter the number of the second record card (the one you want to keep).

- It will ask if you want to mark the card you are transferring records FROM, as deleted and remove it. If you are happy to remove the card completely then answer Yes, if unsure answer No (It may be advisable to say 'No' the first few records you do just so you can see the program is working).

- The top of the screen will show you the client record card numbers of the two records you are merging. If they are NOT correct then say No to Continue, otherwise answer Yes.

- After the transfer, go to the record card you are keeping, go to the clinical record, the history from the other card should now all be sitting as the last entries.

- Press the letter 'Y' This will sort the records into chronological order for you.

NB: Once you are happy the program is transferring histories correctly, you can answer 'yes' to stage 6. It is also possible to delete and remove the cards manually at a later date if necessary.

The same feature will be available in RoboVet3 later this year.

# RoboVet3 Vetwise - Upgrade NOW

## Now's the time to upgrade to RoboVet3

One fifth of the Vetwise users have now upgraded to RoboVet3. The process is simple - you can switch from one system to the other literally overnight. We are employing a two-step upgrade procedure, supported with training and advice on site.

**Stage 1** involves converting your basic stock and service list from Vetwise to RoboVet3. Once converted, you need to spend a small amount of time adding a few extra features to certain products. Day 1 training will guide you through what you need to do.

**Stage 2** involves connecting your client, arrival and clinical listing records from Vetwise to RoboVet3 with supportive training over two days. At the end of the second day you will be off and away on RoboVet3 leaving Vetwise in the background.

**Remember**, early conversion brings with it discounted training so keeping the cost, as well as the hassle, down to a minimum. If you haven't got your conversion booked yet please contact us now so that we can schedule you in before your concessionary upgrade training time runs out this autumn.

# RoboVet3 NEW release, NEW features

## NEW features in August 2002 release


Now available as a free upgrade for RoboVet3 users, the August release has some new and exciting new features. Listed below are just a small number of the new features. Full notes accompany the release with a list of changes and fixes.

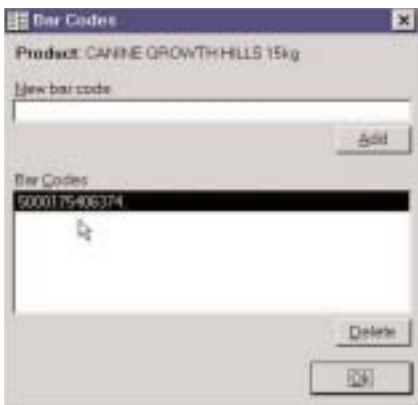
### Barcode scanning

Bar code scanning is now fully available for RoboVet3 users as well as for PremVet5 users. With a bar code scanner attached to your PC, you can scan in your latest delivery consignment from leading wholesalers and then sell products with a simple scan of the bar code.

For mixed animal practices, scanning the relevant bar codes allows the user to automatically add to the sales details, the batch number and the expiry date. This takes the hassle out of batch number recording and allows for far more accurate recording than could be achieved with a manual system.

For over the counter sales of diet foods, in particular where the product range is wide, a quick scan of the bar code ensures the right product is sold at the right price.

RoboVet3 users on the August 2002 release, simply go to the product in question, and locate the additional information section. Click the  button to reveal the pop-up window, scan the product and click Add (or CTRL + A) to add the product.



For only £200 + VAT you could be speeding up sales, freeing busy lines in reception and taking the hassle out of batch linking. Give Amy MacRae a call to discuss your scanner requirements on 0131 556 0555. PremVet5 users already have barcode scanning functionality compatible with PCs, Axel or Wyse terminals.

## Windows 2000 and XP supported

Both PremVet5 and RoboVet3 can be run under Windows 2000 or Windows XP Pro. So, when adding extra PCs or upgrading your operating system, you don't have to worry about deciding on which one to go for. RoboVet3 users can 'mix and match' operating systems as needed.

### Order processing

Order processing has been enhanced and simplified. Not only does it support bar code scanning in of new deliveries but the 'on order' form has been removed. A new form is now used detailing the list of stock ordered, and the quantity still due. In addition to other major wholesalers, RoboVet3 now supports electronic ordering to GenusXpress.

### FDI Mark II

Commercial pressures on today's veterinary practices mean that you need to keep a close eye on your business performance relative to other like-minded practices. The Fort Dodge Index Mark II gives you just what you need to benchmark your performance.

Mark II is now available to PremVet5 and RoboVet3 users. You do not have to be an avid user of FDI Dodge vaccines to qualify for the service. Provided your sales volume of FDI Dodge products overall is above a key threshold, the FDI team will welcome you aboard.

For RoboVet3 users, the setup procedure has changed and you need to start setting up your system sooner rather than later. Check out the help files or call Support for full instructions on system setup.

### Stock management

There is a new Filtered Stock List script which allows you to look at the following reports:

**Stock Take** - gives you a stock taking list that you can print off to help with a manual stock take.

**Valuation Report** - reports on stock valuation.

**Product List** - a simple product list

It is also possible to apply filters to lists of stock to achieve a more refined list.

# Vetsolutions Update

## Safe and secure internet access

We can now provide you with internet access from every PC on your practice network, whether you are using PremVet5 or RoboVet3. It doesn't matter if you are using ADSL, ISDN, or dial-up modem we can configure and help protect your network for internet and email access.

Please give us a call and we will connect your system at minimal cost, and recommend how you can stay protected from viruses and hackers.

## Speedier identichip registrations

Following consultation agreement with Animalcare, PremVet5 can automatically generate and print your registration form with all client and animal details completed by the system. All you have to do is print and despatch the form. If you would like to set your system up to automate this process do give us a call now on 0131 556 0555.

## Congratulations

World Cup viewing - Peter Holbrook, Practice Manager at the Bishopton Veterinary Group, Ripon, won the BSAVA Congress TV dream and is now the proud owner of a 32" screen TV. This arrived just in time to see the World Cup in finest detail. Rumour has it Peter is now wrestling with local authorities to have his living room extended to cater for the TV!

Marathon lady - RoboVet developer Helen McHarry-Holt (alias Harry) completed the London Marathon in 4 hours and 33 minutes and raised £1,000 for the Royal Veterinary College Animal Health Trust from many of our users - Thankyou!

Within an hour of the race Harry sent a text message from a hot bath telling her boss she was ready for a day shopping on Oxford Street.

## We need your help!

**We are often asked about the relative costs of cross updating, data synchronisation, dial up ISDN, ADSL, leased lines from prospective customers or existing customers considering a change.**

While we can quote industry standard figures we would like some real number to share with you all. Please spare a few minutes to complete the enclosed questionnaire, giving us as accurate information from your telecom bills as possible.

Naturally, we will keep individual practice data confidential but will publish the aggregate results. Of course, if you want to make a change then do please discuss it with us. We can support modem, ISDN, ADSL and leased line options for both PremVet5 and RoboVet3.

# Lifelearn®



*Turning Information Into Knowledge*

**Lifelearn** provides a complete range of guides and fact sheets to give your clients advice on how to care for their pets. They are ideal way of helping you provide added value service to your clients. Each handout can be printed directly from the consulting room and personalised to include client and animal names as necessary.

A completely revised set of guides have just been produced and are available to **PremVet5** or **RoboVet3** users whether you have PCs, Axel or Wyse terminals. Client Handout Series are now available for Canine, Feline, Behaviour (Canine & Feline), Equine, Exotic, Cage Birds & Parrots and Pharmacy. Lifelearn have been producing these very popular Handouts since 1996 and they are reviewed, updated and extra topics added annually. There are now approximately 550 topics and most are two pages of A4 in length.

### Please contact us if:

- You would like to view some sample copies, have list of topics and pricing details.
- You purchased some series of the Handouts a few years ago and would like them updated.
- You have up-to-date copies of the Handouts and would like them electronically incorporated into either RoboVet3 or PremVet5.

# NEW Faces Update

## Gerry Geddes

To help coordinate the implementation of new systems and upgrades, **Gerry Geddes** has been appointed as implementation co-ordinator. A Kiwi, Gerry has spent her career to date in customer service based roles initially with Air New Zealand and more recently with a number of financial institutions in Edinburgh.



## Rachel Stevenson

We would like to welcome aboard **Rachel Stevenson**, who joined the Vet solutions support team in June. Rachel has been working in veterinary practices for the past 10 years where she was responsible for administrating PremVet5 in two separate practices. With her knowledge of life on the other end of the telephone, Rachel is keen to ensure your calls get dealt with swiftly and effectively.



## Amy MacRae

Amy MacRae also joins the team as sales co-ordinator. Amy has been working in hotel management in Edinburgh prior to joining Vet solutions.



# Top Tips Latest short cuts and info

## PremVet<sup>5</sup>

### PremVet5 Quick Tip 1

Pressing F10 when at any PremVet menu will tell you what the time is? (Check that the computer clock has been set correctly first!)

If you press F10 when on a client's management and clinical records, it will tell you how long you have spent on that card, useful during a consult as it indicates the time you spent with a client.

### PremVet5 Quick Tip 2

- Press F8 to get a basic calculator.
- Use + - as normal and \* for multiply and / as divide.
- For instance 38.75/117.5\*100 will give you the price EX VAT.

### PremVet5 Quick Tip 3

Press F7 to search your telephone directory

You can enter all your contact numbers into the directory, (DEFRA, Insurance companies, laboratories etc) and then simply call them up by pressing F7.

The telephone directory is accessed through:

- Utilities > Telephone directory (classic style menus)
- Misc Utilities > Telephone directory (new style menus).

### PremVet5 Quick Tip 4

Press F5 to send messages around the computer system

It's a simple message handler to let you communicate between the various terminals on the system. Reception can send a message through to the consulting room, letting the vet know that Mr Bloggs is getting impatient! Press F5 to enter messaging, enter the ID of the person you want (or a \* if you want everyone to read it) and type your message. A 'new message' prompt will flash on their screen next time they hit enter. It also shows at the top right of the main menu screen. You press the = sign to read your messages.

### PremVet5 Quick Tip 5

Use the address book to enter all your NON client contacts. Enter their addresses and phone/fax details plus relevant notes. You will now be able to access their telephone numbers through F7 and print address labels directly from the address book, no more handwriting addresses! The address book is accessed through:

- Utilities > Address Book (classic style menus).
- Misc Utilities > Address book (new style menus).

## ROBOVET<sup>3</sup>

### RoboVet3 Quick Tip 1

When finding a client in Robovet use the 'Tab' key instead of the mouse to move between the fields, and after you have typed in the client details, press return to start the search.

You can also use the 'Tab' key when entering a new client. Simply enter the information you want in each field and press 'Tab' to move to the next field.

You can use 'Tab' to move between the command buttons and then press return to carry out the command.

### RoboVet3 Quick Tip 2

Keyboard strokes are also available in RoboVet3. Note that on each button you usually select with a mouse typically has one letter of the word underlined. Select Alt and the underlined letter to perform the desired option. For example, when in a consultation window, Alt N creates a 'N'ew consultation while Alt C 'C'loses the consultation window.



### RoboVet3 Quick Tip 3

Credit notes are a new feature added as part of RoboVet3. But how to create a credit note for a consultation already invoiced is a common question with the Support team.

To create the credit note, click the Add New button and add the products or services you wish to credit back to the client's account. You may use an unlisted product if you wish to generate a credit note as a goodwill gesture. Once you have added the items click the credit note button. This marks the consultation as credit note.

Now open the accounts window and you will see a new entry for the credit note. You can allocate this credit note to an unpaid invoice using either the manual or auto allocate buttons.

Note that the credit note feature should be used for invoiced work only. Where a consultation fee is paid for at the time of the consultation, no invoice is created and so a refund should be used instead.

### RoboVet3 Quick Tip 4

Do you need a one off address label for a client ñ perhaps to put on a sample bottle or forward some insurance documents?

From the consultation screen, select print to display the RoboVet Print screen. The address label option is highlighted. Click Print (or Alt I for Pr'i'nt) and your label will be printed on the default label printer. In addition, you can print multiple copies of the same label or print labels for all clients in your saved consultation set.

