

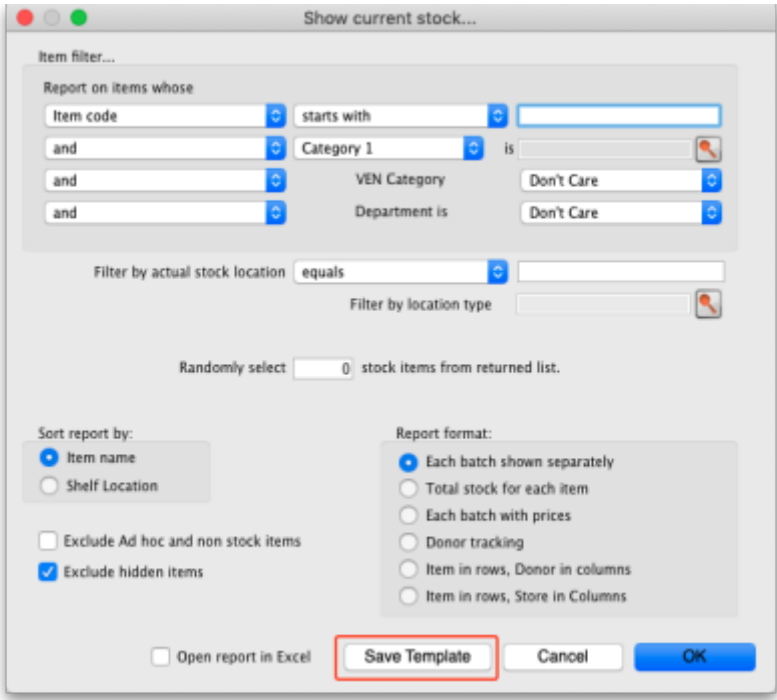
# 13.10. Saving report templates

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Report templates are pre-set values for the filters used to create particular reports. They are a great way of assembling a set of frequently run reports and making sure they are generated with the correct settings.

## Creating templates

To create a template, simply choose a report to run by clicking on its option in the Navigator or menus, choose all the filter settings that are to be part of the template then click on the **Save Template** button on the bottom of the report's filter window. Here's the current stock report's filter window showing the button:



You can choose settings for any of the drop down lists, checkboxes or radio buttons or enter any text in any of the text fields, in fact any of the elements that make up the filter - all will be remembered in the template. Below is an example for the current stock report which is set to report on all items with a name beginning with 'a' in the category 1 of 'Antibiotics', showing the Total stock for each item and which will be opened in Excel:

Item filter...

Report on items whose

Item code starts with a

and Category 1 is Antibiotics

and VEN Category Don't Care

and Department is Don't Care

Filter by actual stock location equals

Filter by location type

Randomly select 0 stock items from returned list.

Sort report by:

☒ Item name

☐ Shelf Location

☐ Exclude Ad hoc and non stock items

☒ Exclude hidden items

Report format:

☐ Each batch shown separately

☒ Total stock for each item

☐ Each batch with prices

☐ Donor tracking

☐ Item in rows, Donor in columns

☐ Item in rows, Store in Columns

☒ Open report in Excel

Save Template Cancel OK

When you click on the **Save Template** button, a window opens for you to enter the template's details:

Save Template

Report name

Form to use for printing

Stock take total by name location

Comment

View preferences

☐ Public

Edit preferences

☐ Public

Cancel OK

- **Report name:** Enter the name the template will have in mSupply. Make it meaningful so that you know what report you're running when you select it. e.g. "Monthly stock report"
- **Form to use for printing:** Select which of the report printout forms you want to use for this template. If you have had a custom report made for you, it will probably appear in this list. If you haven't there will only be one item in this list.
- **Comment:** Enter anything you want to remember about the template for you and others to see. You could enter the purpose of the report or the reason the template was created.
- **View preferences:** Check the *Public* checkbox if you want all users to be able to see the template in the list and therefore run it. If you leave it unchecked then this template will only be visible, and therefore runnable, by you.
- **Edit preferences:** Check the *Public* checkbox if you want all users to be able to edit the template, leave it unchecked if only you should be able to edit it. Please note that you can only

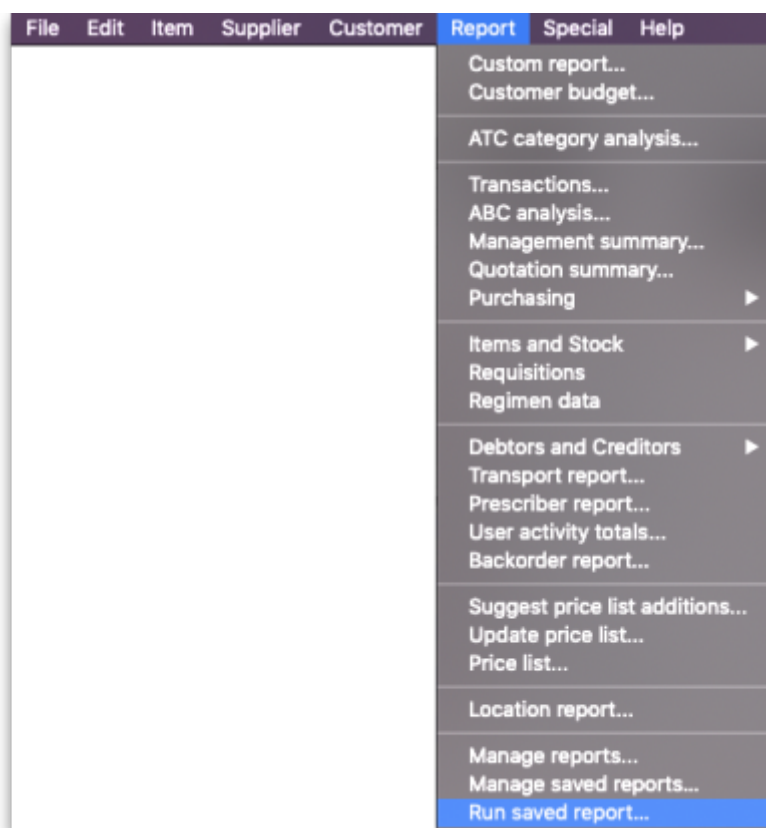
edit the details on this window for a template, not the actual filter settings made on the previous screen. If you want to edit those, just delete the template and re-create it with the changed filter settings.

When you're finished, click on the **OK** button to save the template.

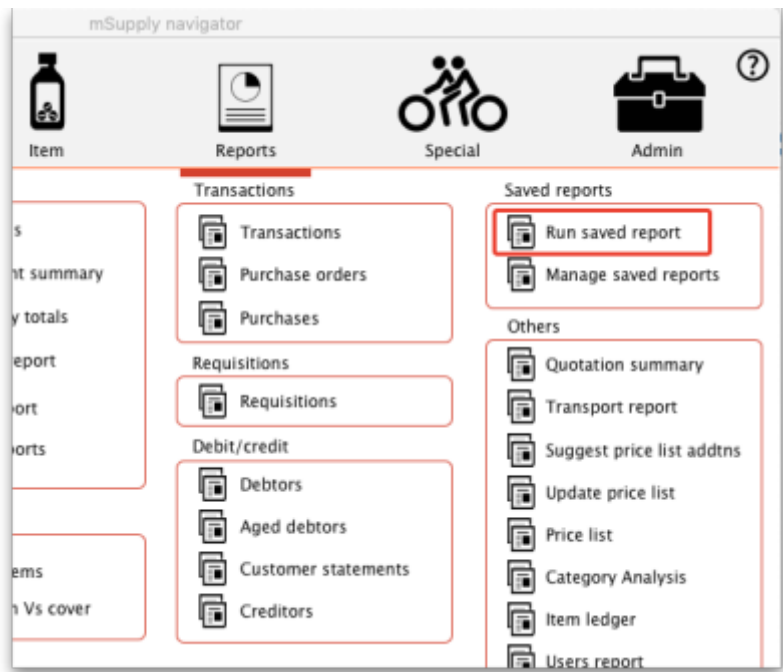
## Running templates

If you are in supervisor mode, templates work as normal but you must select the stores to unclude in the report. The store selection is **not** stored as part of the template. If you don't select the stores, you will get a *No data to report on* message and no report will be generated.

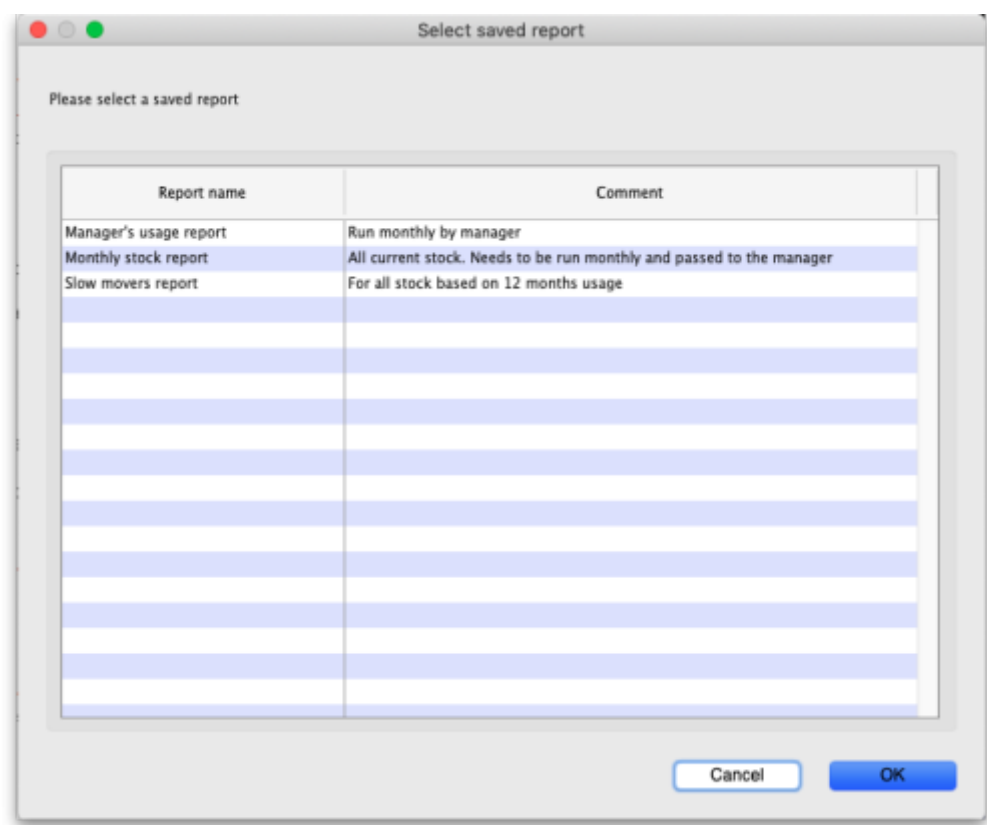
To run the templates you have created, choose **Report > Run saved report...** in the menus:



or click on the *Run saved report* item on the *Reports* tab of the Navigator:



Either way, a window is displayed containing all the names of the report templates that have been created and that you are allowed to run (either you created or others created with the *Public* viewing preference checked):



Note that the report templates are displayed in alphabetical order of name so, if you want them to appear in a particular order in this window, put a number at the beginning of all your template names.

To run a report template, simply double-click on it and the report filter window will appear with the settings you selected when you created the report template. In this example, selecting the “Monthly stock report” template, created in the Creating templates section above, opens the report filter

window like this:

The 'Show current stock...' dialog box is shown. It has a title bar with standard window controls. The main area is divided into several sections:
 

- Item filter...**: A section for defining filters. It includes a 'Report on items whose' section with four rows of filters: 'Item code' starts with 'a', 'Category 1' is 'Antibiotics', 'VEN Category' is 'Don't Care', and 'Department' is 'Don't Care'. Each filter has a dropdown arrow.
- Filter by actual stock location**: A dropdown set to 'equals'.
- Filter by location type**: A dropdown with a search icon.
- Randomly select**: A text input set to '0' followed by 'stock items from returned list.'
- Sort report by:**: Two radio buttons, 'Item name' (selected) and 'Shelf Location'.
- Report format:**: A group box containing five radio buttons: 'Each batch shown separately', 'Total stock for each item' (selected), 'Each batch with prices', 'Donor tracking', and 'Item in rows, Donor in columns'.
- Exclude Ad hoc and non stock items**: An unchecked checkbox.
- Exclude hidden items**: A checked checkbox.
- Buttons**: At the bottom, there is a checked checkbox for 'Open report in Excel', followed by 'Save Template', 'Cancel', and 'OK' buttons.

Note that the filter settings are exactly the same as saved in the template. You can still manually change the filter settings in this window if you wish. Clicking on the **OK** button will run the report as usual and bring up the print options window:

The 'Printing options' dialog box is shown. It has a title bar with standard window controls. The main area contains:
 

- Form to use**: A dropdown menu set to 'Stock take sheet'.
- Remember this choice**: An unchecked checkbox.
- Message**: A large text area for a custom message.
- Destination**: A group box with five radio buttons: 'Printer', 'Preview', 'PDF file on disk', 'Email PDF', and 'Export to Excel' (selected).
- Buttons**: At the bottom, there are 'Cancel' and 'OK' buttons.

The **Form to use** drop down list will be set to the form you selected in the **Form to use for printing** drop down list when you saved the template. Again, you are free to manually change any of the settings in this window if you want to. To finally print out the report, click on the **OK** button.

In this way, you can see that to run any particular report template takes only 3 mouse clicks, no typing and no thinking. That's very helpful if you have to run the same set of reports every month for example!

## Editing and deleting templates

To edit or delete report templates, choose **Reports > Manage report templates...** in the menus or click on **Manage saved reports** on the *Reports* tab of the Navigator to open this window:



filter settings. If you want to do that, delete the template and re-create it with the new filter settings.

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