2025/06/07 11:21

13.10. Saving report templates

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:

	Show current stock	
tem filter		
Report on items whose		
Item code 🗢	starts with	
and 😌	Category 1 🜍 is	٩
and ᅌ	VEN Category Don't Care	State
and 🖸	Department is Don't Care	0
Filter by actual stock location	equals 😌	
	Filter by location type	
Randomly select		
Sort report by:	Report format:	
Sort report by:	Report format: 2 Each batch shown separatel	y
iort report by:	Report format: Each batch shown separatel Total stock for each item	v
Sort report by:	Report format: • Each batch shown separateh • Total stock for each item • Each batch with prices	y
Sort report by: term name Shelf Location	Report format: Each batch shown separatel Total stock for each item Each batch with prices	
Sort report by: Item name Shelf Location Exclude Ad hoc and non stock item	Report format: Each batch shown separatel Total stock for each item Each batch with prices Donor tracking	nns

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:

· · · ·	Show current stock		
Item filter			
Report on items whose			
Item code	starts with	o a	
and	Category 1 😳	is Antibiotics	٩
and	VEN Category	Don't Care	٥
and	C Department is	Don't Care	0
Filter by actual stock locati	ion equals	0	
	Filter by location type		_
Randomiv sei	Filter by location type		٩
Randomly sel	ect 0 stock items from re	turned list.	9
	ect 0 stock items from re Report format	turned list.	S
Sort report by:	ect 0 stock items from re Report format Each batc	turned list.	
Sort report by: tem name	ect 0 stock items from re Report format Each batc O Total stoc	turned list. h shown separately	
Sort report by: tem name	ect 0 stock items from re Report format Each batc Total stoc Each batc	turned list. h shown separately k for each item h with prices	S
Sort report by: Item name Shelf Location	ect 0 stock items from re Report format Each bate Total stoc Each bate Donor tra	turned list. h shown separately k for each item h with prices	<u></u>
Sort report by: Item name Shelf Location Exclude Ad hoc and non stock i	ect 0 stock items from re Report format Each bate Each bate Each bate Donor tra Item in ro	turned list. h shown separately k for each item h with prices cking	<u></u>

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

Report name	
Form to use for printing	
	la continue and a continue an
Stock take total by name	location
Comment	
View preferences	Edit preferences
View preferences	Edit preferences

- **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.

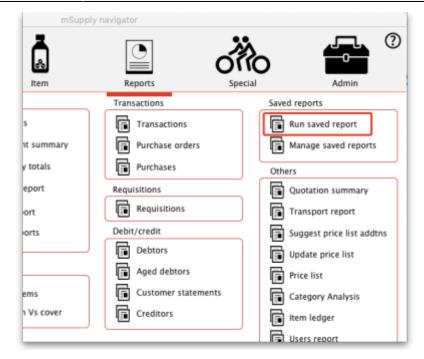
Running templates

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:

File	Edit	Item	Supplier	Customer	Report Special Help
					Custom report Customer budget
					ATC category analysis
					Transactions ABC analysis Management summary Quotation summary Purchasing ▶
					Items and Stock Requisitions Regimen data
					Debtors and Creditors Transport report Prescriber report User activity totals Backorder report
					Suggest price list additions Update price list Price list
					Location report
					Manage reports Manage saved reports
_	_	_			Run saved report

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):

Report name	Comment
Manager's usage report	Run monthly by manager
Monthly stock report	All current stock. Needs to be run monthly and passed to the manager
Slow movers report	For all stock based on 12 months usage

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:

tem filter		
Report on items whose		
Item code	🕽 starts with 🖸 a	
and	Category 1 is Antibiotics	٩,
and	VEN Category Don't Care	0
and	Department is Don't Care	0
Filter by actual stock location	on equals	
	Filter by location type	
	the system type	
Randomly sele	ct 0 stock items from returned list.	
Randomly sele	ct 0 stock items from returned list.	
	ct 0 stock items from returned list. Report format:	
iort report by:	Report format:	
ort report by: Item name	Report format: Each batch shown separately	
ort report by: Item name	Report format: Each batch shown separately Total stock for each item Each batch with prices	
Sort report by: Item name Shelf Location	Report format: Each batch shown separately Total stock for each item Each batch with prices	15
Sort report by: Item name Shelf Location Exclude Ad hoc and non stock it	Report format: Each batch shown separately Total stock for each item Each batch with prices Onor tracking	
Sort report by: Item name Shelf Location Exclude Ad hoc and non stock it	Report format: Each batch shown separately Total stock for each item Each batch with prices Donor tracking Item in rows, Donor in column	

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:

• •	Printing options
Form to use Stock take sheet	Remember this choice
Message	Destination
	Printer Preview PDF file on disk Email PDF Excel Excel
	Cancel

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:

Quick search				Run	E dit	Delete	Duplicate
Report	Created by	Last modified	Туре	Comment			
1 Monthly stock report	Sussol	25/07/2019	currentStock				
2 Manager's usage report	Sussol	25/07/2019	itemUsage				
3 All distribution last month	Sussol	25/07/2019	transaction				

The table contains a list of all the report templates that have been created in the system.

The **Quick search** text field allows you to filter which templates are displayed: only templates with names containing the text you type in here are displayed in the list. Handy for finding a particular template if there are a lot in the list.

- **Delete** button: to delete a template, click on it in the list to select it then click on the **Delete** button to delete it. After you confirm the deletion the template will be removed.
- **Run** button: select a template from the list then click on this button to run it (same as selecting *Report > Run report templates...* from the menu and selecting the template there).
- **Duplicate** button: you can duplicate a template by selecting it in the list and clicking on this button. The duplicate is added to the end of the list and has the same name as the template you selected but with " [duplicate]" added to the end.
- Edit button: To edit a report template either select it in the list and click on this button or double-click on it in the list. When you do so, the template's details window is displayed and you can edit the details as required:

	Edit Template
Report name	
01 Monthly stock report	
Form to use for printing	
Stock take sheet	0
Comment	
View preferences	Edit preferences
Public	Public
_	
	Cancel OK

Note that these are the only details you can edit for a template; you cannot edit the template's

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

Previous: **13.12.** Manage reports | | Next: **13.14.** Custom reports

From: https://docs.msupply.org.nz/ - **mSupply documentation wiki**

Permanent link: https://docs.msupply.org.nz/reports:report_templates?rev=1596758448

Last update: 2020/08/07 00:00

