# 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**

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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:

tem filter		
em niter		
Report on items whose		
Item code	starts with	
and 🗘	Category 1 😋 is	s
and ᅌ	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 return	ned list.
Randomly select	0 stock items from return Report format:	ned list.
Randomly select	0 stock items from return Report format:	ned list.
Randomly select ort report by: • Item name • Shelf Location	0 stock items from return Report format: • Each batch si • Total stock fi	ned list. hown separately or each item
Randomly select ort report by: Item name Shelf Location	0 stock items from return Report format: • Each batch sl • Total stock fo • Each batch w	ned list. hown separately or each item ith prices
Randomly select ort report by: Item name Shelf Location	0 stock items from return Report format: • Each batch si • Total stock fo • Each batch w • Donor trackir	ned list. hown separately or each item ith prices 19
Randomly select ort report by: Item name Shelf Location Exclude Ad hoc and non stock item Exclude hidden items	0 stock items from return Report format: • Each batch si • Total stock fo • Each batch w • Donor trackin • Item in rows,	ned list. hown separately or each item ith prices 19 Donor in columns
Randomly select iort report by: Item name Shelf Location Exclude Ad hoc and non stock item Exclude hidden items	0 stock items from return Report format: • Each batch sl • Total stock fo Each batch w • Donor trackii • Item in rows, • Item in rows,	ned list. hown separately or each item th prices 19 Donor in columns Store in Columns

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:

hem filter			
nem niter			
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	equals	0	
	Filter by location typ	pe	
			_
Randomly select	t 0 stock items from r	returned list.	
Randomly select	t stock items from r Report forma	returned list. it:	
Randomly select Sort report by:	t 0 stock items from r Report forma Each bat	returned list. it: ich shown separately	
Randomly select Sort report by: Item name Shelf Location	t 0 stock items from r Report forma Each bat O Total sto	returned list. at: ich shown separately ock for each item	
Randomly select Sort report by: Item name Shelf Location	t 0 stock items from a Report forma Each bat Total sto Each bat	returned list. ut: uch shown separately ock for each item uch with prices	
Randomly select Sort report by: Item name Shelf Location Exclude Ad hoc and non stock ite	t 0 stock items from a Report forma Each bat Total sto Each bat Each bat Donor to	returned list. ut: uch shown separately ock for each item uch with prices acking	
Randomly select Sort report by: Item name Shelf Location Exclude Ad hoc and non stock ite Exclude hidden items	t 0 stock items from a Report forma Each bat Total sto Each bat Each bat Donor to Item in a	returned list. It: It: It: It: It: It: It: It:	
Randomly select Sort report by: Item name Shelf Location Exclude Ad hoc and non stock ite Exclude hidden items	t 0 stock items from ( Report forma Each bat Each bat Donor to Htem in a Htem in a	neturned list. at: ach shown separately bock for each item ach with prices racking rows, Donor in columns rows, Store in Columns	

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	
Stock take total by name	location O
Comment	
View preferences	Edit preferences
View preferences	Edit preferences
View preferences Public	Edit preferences Public
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, the stores you include in the report are also saved with the template. The first store in the list is selected by default so that at least one store is always selected so **DON'T FORGET** to select the correct stores you wish a report template created in supervisor mode to be run over.

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

File	Edit	Item	Supplier	Customer	Report	Special	Help	
					Custor Custor	m report mer budge	ıt	
					ATC ca	ategory an	alysis	
					Transa ABC a Manag Quota Purcha	actions nalysis jement sur tion summ asing	nmary ary	•
					ltems : Requis Regim	and Stock sitions en data		•
					Debto Transp Prescr User a Backo	rs and Cre port report iber report ctivity tota rder report	ditors  t als t	•
					Sugge Updat Price li	st price lis e price list ist	t additions	\$
					Locati	on report		
					Manag Manag Run sa	e reports. le saved re lived repor	 eports t	

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:

here filter		
item hiter		
Report on items whose		
Item code	starts with 😋 a	
and	Category 1 S 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	
Bandamb, cala	et 0 stock items from esturned list	
Randomly sele	ct 0 stock items from returned list.	
Randomly sele	ct 0 stock items from returned list.	
Randomly sele	ct 0 stock items from returned list. Report format:	
Randomly sele Sort report by: • Item name	ct 0 stock items from returned list. Report format: C Each batch shown separately	
Randomly sele Sort report by: Item name Shelf Location	ct 0 stock items from returned list. Report format: Cach batch shown separately O Total stock for each item	
Randomly sele Sort report by: Item name Shelf Location	ct 0 stock items from returned list. Report format: Each batch shown separately Total stock for each item Each batch with prices	
Randomly sele Sort report by: Item name Shelf Location Exclude Ad hoc and non stock it	ct 0 stock items from returned list.  Report format: Each batch shown separately Total stock for each item Each batch with prices ems Donor tracking	
Randomly sele Sort report by: Item name Shelf Location Exclude Ad hoc and non stock it Z Exclude hidden items	ct 0 stock items from returned list. Report format: Each batch shown separately Total stock for each item Each batch with prices on tracking Item in rows, Donor in column	13
Randomly sele Sort report by: Item name Shelf Location Exclude Ad hoc and non stock it Exclude hidden items	ct 0 stock items from returned list. Report format: Each batch shown separately Total stock for each item Each batch with prices Donor tracking Item in rows, Donor in column Item in rows, Store in Column	15

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 shee	Remember this choice
Message	Destination
	Printer Preview PDF file on disk Email PDF
	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:

• • •	Manage Report Templates							
Quick search					Eun Run	Edit	Delete	<b>Duplicate</b>
Report	Created by	Last modified	Туре		Comment			
01 Monthly stock report	Sussol	25/07/2019	currentStock					
02 Manager's usage report	Sussol	25/07/2019	itemUsage					
03 All distribution last month	Sussol	25/07/2019	transaction					
							_	04
								UK

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

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