

Using Report Templates

The purpose of a template is to simplify report production. Reports that you use frequently can be set up, saved as a template, and then run when desired without having to reset the parameters. Your saved templates will always be the first tab displayed when you use the Schedule New Reports wizard.

To Create a Template:

1. **Select** a report.
2. **Create** a name on the Basic Information tab that will help you identify it – ex. First grade overdues.
3. **Select** appropriate criteria to set parameters as you desire.
4. **Click** Save As a Template button at the bottom of the screen.

Template Options

To Run a Template report:

1. **Select** a report from the Template tab list.
2. **Click** Setup & Schedule.
3. **Select** Run Now.

Report name >	Owner	Date Created
OH Incremental Ovrdue Notices	ADMIN	12/22/2004,14:26
OH Item Count (LIBRARY)	ADMIN	12/22/2004,14:31
OH Item Count of Overdues / Fines	ADMIN	12/22/2004,14:29
OH Item Count Only Circ Count	ADMIN	12/22/2004,14:33
OH Overdue Desk List	ADMIN	12/22/2004,14:27

To View a Template report's criteria:

1. **Select** report from the Template list.
2. **Click** View.

This will open Word and display data similar to the report log.

- It will NOT display the finished report.
- It will NOT display the report setup screens.
- To view the completed report, you must run it and then go to the Finished Report Wizard.

To Modify a Template:

1. **Select** report from the Template list.
2. **Click** Modify.
3. **Make any changes** to criteria. Be sure to modify the name of the report also if needed.
4. **Click** OK to save your changes.

NOTE: DO NOT select Run Now. If you do, the modified report will not be saved. You need to go back to Schedule New Reports and select your revised report from the list to run it.

To Copy a Template:

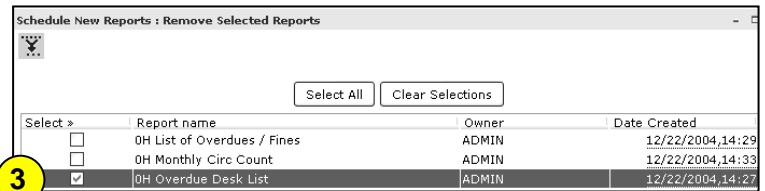
This is a good way to set up similar reports with only minor changes, such as grade or teacher.

1. **Select** a report from the Template list.
2. **Click** Copy.
3. **Make any changes** to the criteria and the name of the report.
4. **Click** OK to save your changes.

To Remove a Template:

It's a good idea to save reports as templates while you're experimenting and trying to find one that meets your needs. However, it's important to delete reports you don't like to avoid confusion.

1. **Select** a report from the Template list.
2. **Click** Remove.
3. **Click** on the box next to all reports you want to remove from your Template list. Select all button will select all reports.
4. **Click** Remove for selected reports. Clear Selections will uncheck reports.
5. **Click** OK to verify.



To Schedule a Template Report:

Schedule a report to run in the future on a designated day and time.

1. **Select** the report from the Template list.
2. **Click** Set up & Schedule.
3. **Click** Schedule.
4. **Choose** the criteria to schedule the report as desired.
5. **Click** Schedule.

See *Schedule New Reports*, page 3 for detailed directions on scheduling a report.

