Report Templates
RecTrac 10.3

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Report Templates

Introduction

RecTrac offers users the ability to create and save multiple Report Templates for each of the over 570 reports in the application. A Report Template includes saved settings and criteria for printing the given report in a certain way. This is a time saver when running RecTrac reports, especially for those reports that you run commonly in different ways (and at different times) to get different data.

All static entries on a report screen (User ID ranges, range settings, toggles, etc…) are saved with the template. Browser entries and fields that are intended to be reset after exiting a report (such as Date Ranges) are not saved in the Report Template.

Additionally, the Options screens on all RecConnect reports (Label Options, Report Options, Email Options, Letter Options, Export Options and Statistics Options) contain a Template button at the bottom of the screen. This button will bring the user into Template Maintenance for that particular Option for the RecConnect report being run. An Option Template includes saved settings and criteria for exporting a given report.

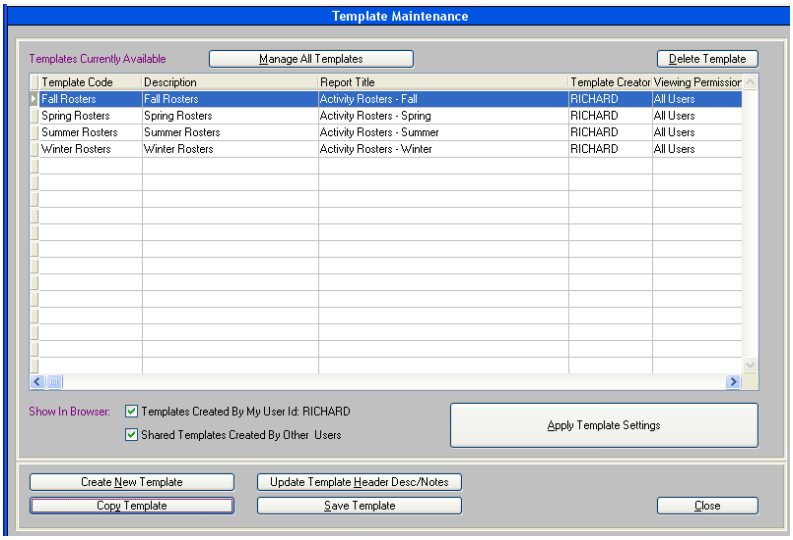
Note: Option templates are unique to the RecConnect report you are running and cannot be shared between different reports (i.e. an Export template created in Family Member RecConnect will not be available in Pass RecConnect. In that event, you must recreate the Export template.)

The individual creating a template determines who can use it: the individual who created it only or all users. Once a template has been created, only the User who created it can modify/delete it.

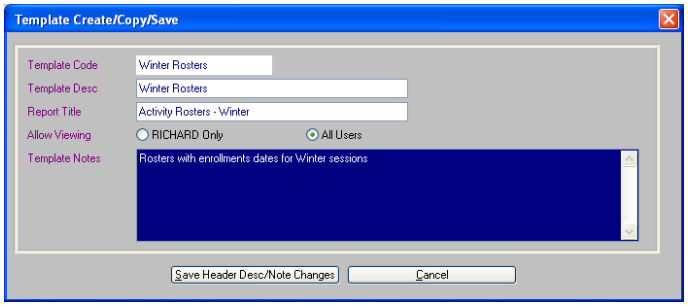
Creating a Report Template

Note: For purposes of example, this document uses the Activity Roster Report. However, *every* report in RecTrac 10.3 contains a **Templates** button at the bottom of the screen. Additionally, the Export Options screen of all RecConnect reports contains an Export Options Template button.

1. Go to the report for which you want to create the Report Template. (*For Example: Reports • Activity • Roster Reports • Activity Roster*).
2. Set report parameters on the main report screen and any additional Details screens as you normally would.
3. Click the **Templates** button at the bottom of the screen. You will proceed to the Template Maintenance browser.



4. Click the **Create New Template** button at the bottom of the screen. You will continue to the Template Create/Copy/Save screen.



5. Enter a *Template Code* in the corresponding field and press the <Tab> key. (*For Example: Spring Rosters*).

   Template Codes may be up to 15 alpha/numeric characters in length

6. Enter a *Template Description* and Report Title. The Report Title will appear as the Header when you print your report. Leave the Title field blank, if desired, to use the default header for the report. Using the example above, when printing the Activity Rosters report using the template, the report header will read, "Activity Rosters - Winter." If the Report Title field is left blank, the report header will read, "Activity Rosters," which is the default header.

7. Determine which users should be able to view (and therefore run) this Report Template. Your options are:

   - <User ID currently logged in> Only -- The user ID currently logged into RecTrac. (Richard in the example above)
   - All Users -- Any user that has access to this report.

8. Enter any additional *Template Notes* you wish to include.

   Template Notes appear in this field and on the Template Maintenance browser for the report you're working with ONLY. Template Notes DO NOT appear on the report output.

9. Click **Save Template**. You will return to Template Maintenance and your template will appear in the browser.

10. Click **Close** to return to the Report, itself

Other Buttons / Toggles on the Template Maintenance Screen

The following bullets offer a brief description of the toggles and buttons on the Template Maintenance screen. Press **F1** for more detailed information.

- *Templates Created By My User Id* <User ID logged in here>: Enable this toggle to view Report Templates created by the User ID currently logged in.
- *Shared Templates Created By Other RecTrac Users*: Enable this toggle to view existing report templates (for the selected report only) created by Users other than the one logged in.

Note: To view these Shared templates, the User ID that created it must enable the *Allow Viewing:* **All Users** toggle on the Template Create/Copy/Save screen for that report.

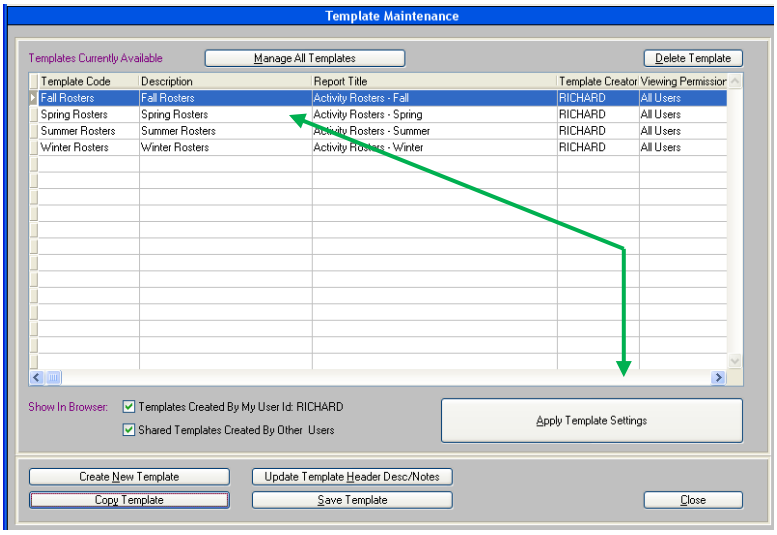
- *Manage All Templates*: Click this button to manage templates created by any user. Access to this button is controlled by Level 2 Manager Override Permissions. If enabled, this button will read ****Manage Template Mode ON****.

Note: This button will NOT appear onscreen if your Level 2 Manage Override Permission is set to **D-Deny**.

- *Delete Template*: Allows you to delete a saved Template. Toggle is located on the upper right-hand side of the Template Maintenance screen. Templates may be deleted by the User ID who created them and/or by anyone with permission to Manage ALL Templates.
- *Apply Template Settings*: See below.
- *Copy Template*: With a Template selected in the browser, click this button to create a copy of it, perhaps with a new User ID, if necessary.
- *Update/View Template Header Desc/Notes*: Allows you to Update (if your User ID is the one that created the template) or View (if the template is shared and your User ID didn't create it) the Code, Description, View Options and Notes for the existing template.
- *Save*: With a Template selected, click **Save** to overwrite the template settings with the current report parameters. You will receive a challenge message asking whether you wish to overwrite the settings. **Save** option is available for the User ID that created the selected Template only.
- *Close*: Returns the user to the Report selection screen.

Running a Report from a Saved Template

1. Go to the report you wish to run.
2. Click the **Templates** button at the bottom of the screen. You will proceed to the Template Maintenance screen.



3. Select/Highlight the Template you wish to run and click **Apply Template Settings**. You will return to the Report selection screen.
4. Make changes as appropriate and click **Print** when ready. You will continue to the Output Selection screen to either print, preview or email the resulting report.

   REMEMBER: All static entries on a report screen (User ID ranges, range settings, toggles, etc…) are saved with the template. Browser entries and fields that are intended to be reset after exiting a report (such as Date Ranges) are not saved in the Report Template

Level 2 Manager Override Permissions for Report Templates

Two (2) Level 2 Manger Override Permissions exist for Report Templates. Both are located on the second Level 2 Manager Override screen on the Permissions device(s).

- Create ‘All User’ Report Templates: Users with this permission can set the Allow Viewing radio set to 'All Users' when creating report templates. Without this permission, a user can create templates for use with his/her User ID only.
- Manage Report Templates: Users with this permission can manager/edit ALL report templates regardless of which user created them.

By default, these permissions are set to **M-Manager Required**.

To change these settings:

1 Go to File Maintenance • System • Device Maintenance • Printer/Device Maintenance. Click the *Type* column header and type the letter ‘P’ on your keyboard.

2 Scroll down the browser to your Permissions device(s). Highlight/select and click **Change**.

3 Enter your RecTrac Master Password and click **OK**.

4 Click **Next** three (3) times or click in the second **Level 2 Manager Overrides** radio set.

5 Make changes as necessary and click **Done.**

6 Repeat steps 2-5 for each Permissions device as needed.

Note: Press **F1** for field level descriptions as needed. See also *RecTrac 10.3 Permissions documentation* linked in the F1 Help.

7 Users linked to a Permissions device that has been modified must exit RecTrac and log back in for changes to take effect.