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# RECTRAC 3.1 REPORT TEMPLATES

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## RecTrac 3.1 Report Templates

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### Report Templates Overview

All reports in RecTrac 3.1 allow the creation of "report templates". These templates allow users to save all report settings (criteria, filters etc) so a report can be easily reproduced. Some examples of when templates are useful:

- Manager end of day reporting. A template would save all the criteria used in running the reports, custom title etc. This would easily allow an assistant manager to run the reports when the manager is not present.
- Accounting reports. Since accounting techs will be running reports for multiple business locations, templates allow settings to be saved for each of these locations. Criteria wouldn't have to be memorized or noted manually.

**Note:** Report templates are assigned permissions. Link the applicable permissions for whoever needs to see a particular template. Typically this is the location running the report, or the accounting office.

# RecTrac 3.1 Report Templates



## Creating/Using a Report Template

Step 1: Access the report that you want to create a template for.

Step 2: Set all the report criteria and search options based on how you want to run this report. Below is a screenshot of how the Navy DAR report is typically run for a location.

**GL Distribution Report**

**Criteria**

- Use Cash Drawer Range ⓘ  
Begin Drawer ⓘ: 70050      End Drawer ⓘ: 70999
- Use Posting Date Range ⓘ  
Begin Posting Date ⓘ: Today -1      End Posting Date ⓘ: Today -1
- Use User Name Range ⓘ  
Begin UserName ⓘ:      End UserName ⓘ: ZZZZZZ

**Filters:** User DataGrid, Transaction Criteria - Receipt, Transaction Criteria - Advanced, Module Filters, Site Filters

**Output Group** ⓘ: Financial Reports      **Add Output**      **Custom Title** ⓘ: SE9999 <My Facility> DAR

**Output Template \*** ⓘ: Navy DAR      **Update Output**      **Output Type** ⓘ: Summary

**Note:** The cash drawer range in the screenshot is an example. Use the cash drawer range for your business location.

**Note:** Since this is a financial report that is typically run the next day for the day priors business, setting the date range as

Today -1

Allows this template to be applied and default in to run it for "yesterday". This date can be set as whatever default is needed though.

Suggest that the report be run one time to make sure it's working before creating a template. Once everything is how it should be, click on 'Report Templates' in the bottom right.



# RecTrac 3.1 Report Templates



## Creating/Using a Report Template cont.

Step 3: The 'Template Maintenance' screen will display. Report templates that your permissions allow you to see will be shown.

**Template Maintenance** i ? x

Options Templates  (0) Refresh
Available Templates 4 to 13 of 20

Code	Description	Created By	Permissions
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	(0) Selected
MA1256-DOW CASH JOURNAL	Deals on Wheels Cash Journal	NOR_MSAWYER	MA1256
MA1256-DOW NAVY DAR	Deals on Wheels DAR	NOR_MSAWYER	MA1256
MA1256-NAVY DAR	Brig Navy DAR	NOR_MSAWYER	MA1256
ND7506-CASH JOURNAL	WARRIOR CAFE CASH JOURNAL REPORT	VSI_JSmiles	ND7506
ND7547-NAVYDAR	River's Edge Navy DAR	ND0001	ND7547
SE0106-CASH JOURNAL	Bogey's Cash Journal	VSI_JSmiles	SE0106
SE0106-GL DISTRIBUTION	Bogey's GL Distribution Report	VSI_JSmiles	SE0106
SE0106-Navy DAR	Bogey's DAR Report	VSI_JSmiles	SE0106
SE5073-NAVYDAR	Portside Cinema Navy DAR	SE0070	SE5073

Create New Template
Update Template Info
Save Template Settings
Delete Template
Close
Apply Template Settings

## Legend

**Create New Template**

Used to create a new template using the settings from the prior report screen.

**Update Template Info**

Used to update the description, permissions or longer description of an existing template.

**Save Template Settings**

Used to save the current reports settings to an existing template. Example: you have a template created but forgot one setting, use this button to save that new setting over your existing report template.

**Apply Template Settings**

Apply the highlighted template and use it's saved settings to run the report. You will be returned back to the main report screen with those saved settings applied.

**Close**

Takes you back to the prior report screen.

## RecTrac 3.1 Report Templates



### Creating/Using a Report Template cont.

Use the applicable button based on what you need to do. If you choose 'Create a New Template' or 'Update Template Info' the following screen will display.

**Report Template Update**

Template Information

Template Code \* ⓘ

Description \* ⓘ

Permissions \* ⓘ

(0) Selected

Notes ⓘ

Plain Text Editor

**Template Code:** If this is a new template, set the code using your region/site 6 character prefix, followed by a – and then what the report is. Example:

SE1234-MY DAR REPORT

**Description:** Brief description of what this report template is. Example:

Navy DAR report for My Business Location

**Permissions:** Select the permissions code for your business location. Most users will only have one option in this drop down, labeled for your business location.

Accounting users should choose the accounting permission code for their region, since most accounting office report templates should be shared with all accounting techs.

Once those fields are filled out, click 'Save' in the bottom right. You will be returned to the 'Template Maintenance' screen. The template you created will show in the list. You can now 'Apply' it to check and see that it saved correctly, or click 'Close' to exit back to the report.