

## SAVING REPORT CRITERIA

The CASPER Reporting application includes functionality that allows you to save the criteria you selected for a report so that you may run it at a later time without selecting all of the criteria again.

The last **CASPER Reports Submit** criteria page (Figure 2-13) for each report provides *Template Folder* and *Template Name* fields as well as **Save** and **Save & Submit** buttons for the purpose of saving the report criteria you selected.

The screenshot shows a web application window titled "CASPER Reports Submit". At the top right, there is a navigation menu with buttons for "Logout", "Folders", "MyLibrary", "Reports", "Queue", "Options", "Maint", and "Home". Below the title bar, the report name "Report: Facility Characteristics Report" is displayed. The main content area contains several input fields: "State" (a dropdown menu set to "AK"), "Facility" (a text input field with a "Find" button to its right), "Begin Date(mm/dd/yyyy)" (a date input field set to "09/01/2006"), "End Date(mm/dd/yyyy)" (a date input field set to "02/28/2007"), "Comparison Group" (a dropdown menu set to "11/01/2004-04/30/2005"), and "Data was calculated on:" (a text input field set to "03/22/2007"). At the bottom of the window, there are two more input fields: "Template Folder:" (a dropdown menu set to "My Favorite Reports") and "Template Name:" (a dropdown menu set to "Facility Characteristics Report"). To the right of these fields are four buttons: "Submit", "Back", "Save & Submit", and "Save".

**Figure 2-13. CASPER Reports Submit Page**

1. To save report criteria, select the desired criteria options, advancing as necessary through all of the **CASPER Reports Submit** criteria pages.

On the last **CASPER Reports Submit** criteria page, the generic name of the report you selected is defaulted into the *Template Name* field. You may save your template with this name, select another template name from the drop-down list or create a new template name by typing in the *Template Name* field.

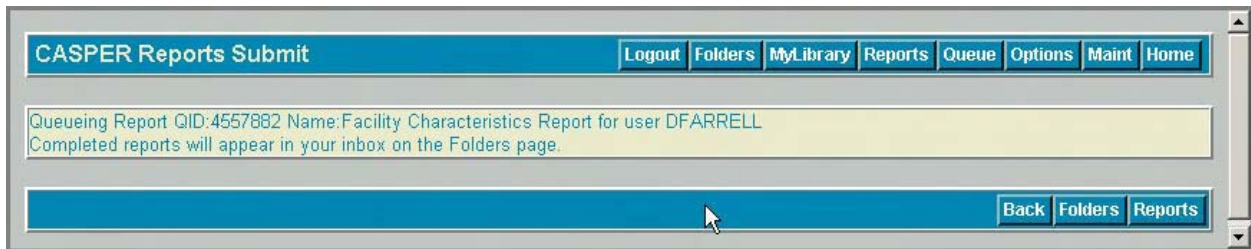
**NOTE:** If you select an existing template name from the drop-down list, the criteria previously saved in that template are replaced with the current criteria selections.

In the *Template Folder* field, *My Favorite Reports* is the defaulted folder name. You may save your template into this folder or create a new folder by typing the new folder name in the *Template Folder* field.

**NOTE:** The *My Favorite Reports* folder does not actually exist until you save a template to it. If you choose to save a template to the *My Favorite Reports* folder, it is created for you when you save the template.

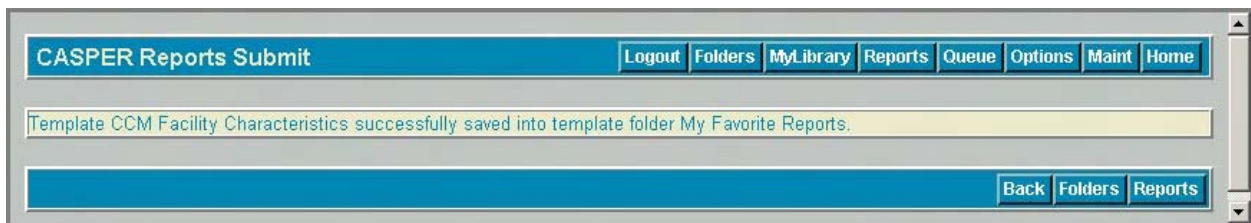
2. Select or enter a name for your template in the *Template Name* field and a folder in which to save the template in the *Template Folder* field.

3. To run the report AND save the criteria for future use, select the **Save & Submit** button. The system responds with verification that the report was placed into the queue for processing (Figure 2-14). The template is saved into the folder you specified.



**Figure 2-14. CASPER Reports Submit Verification Page**

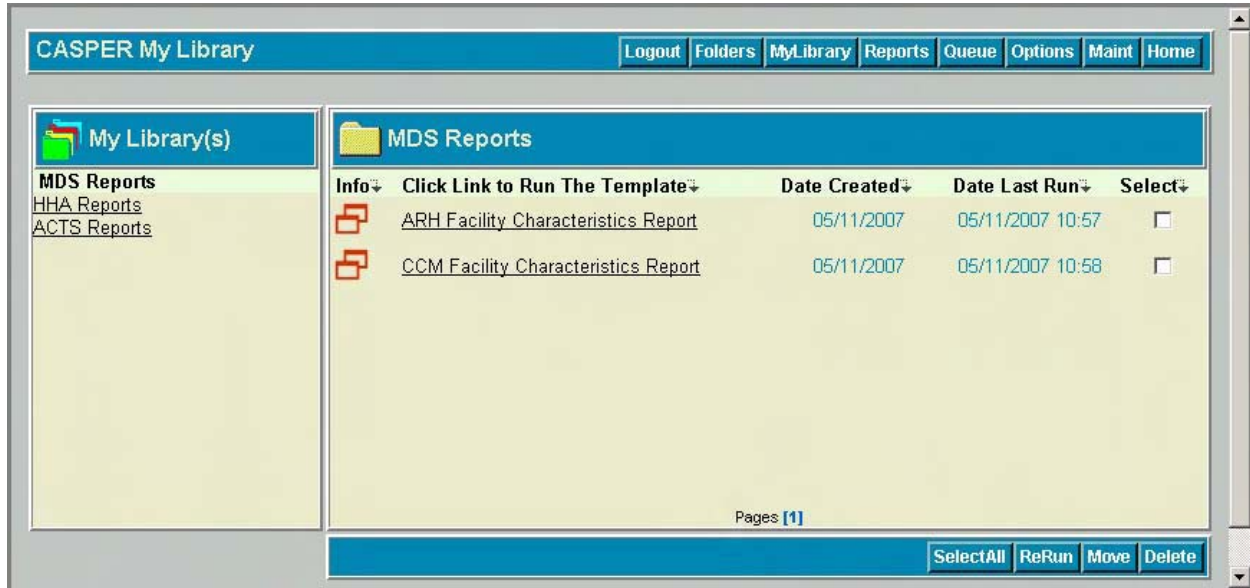
4. If you want only to save the criteria for future use, select the **Save** button. The system responds with verification that the report was saved into the folder you specified (Figure 2-15).



**Figure 2-15. CASPER Reports Submit Verification Page**

## RUNNING AND MAINTAINING SAVED CRITERIA TEMPLATES

To view, run or maintain the report criteria templates you saved, select the **MyLibrary** button on the CASPER tool bar. The **CASPER My Library** page (Figure 2-16) displays.




**Figure 2-16. CASPER My Library Page**

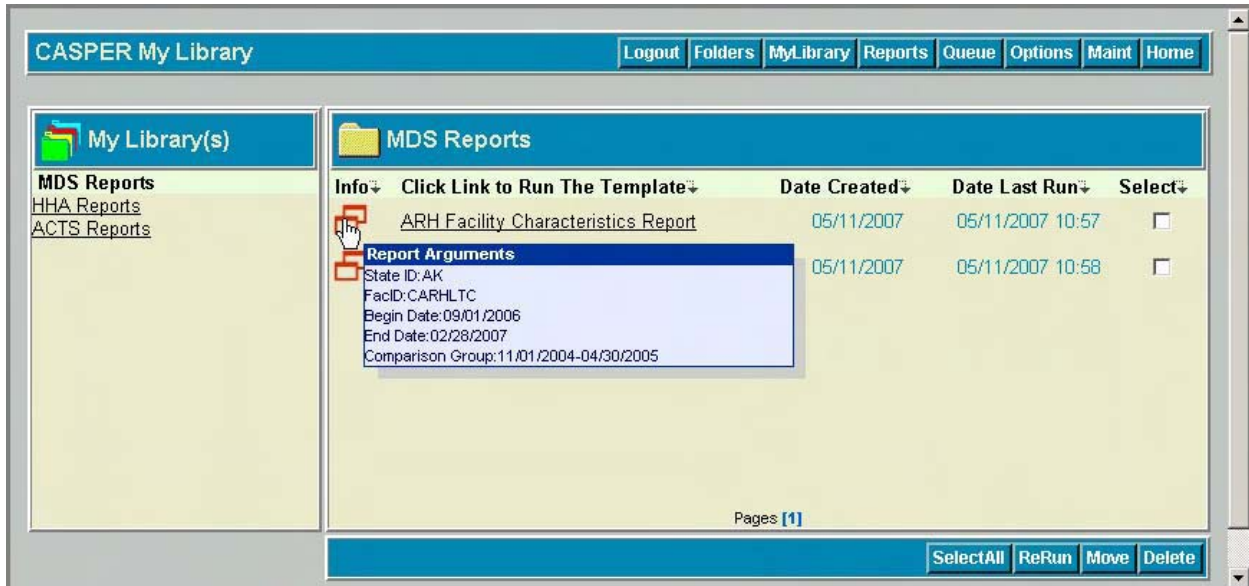
Your template folders are listed in the *My Library(s)* frame of the **CASPER My Library** page. The saved criteria templates that are stored in the selected template folder are listed in the right frame of the page.

### Viewing and Modifying Saved Criteria Templates

The saved criteria template names listed in the right frame of the **CASPER My Library** page are links with which you may view the report criteria options saved in a template.

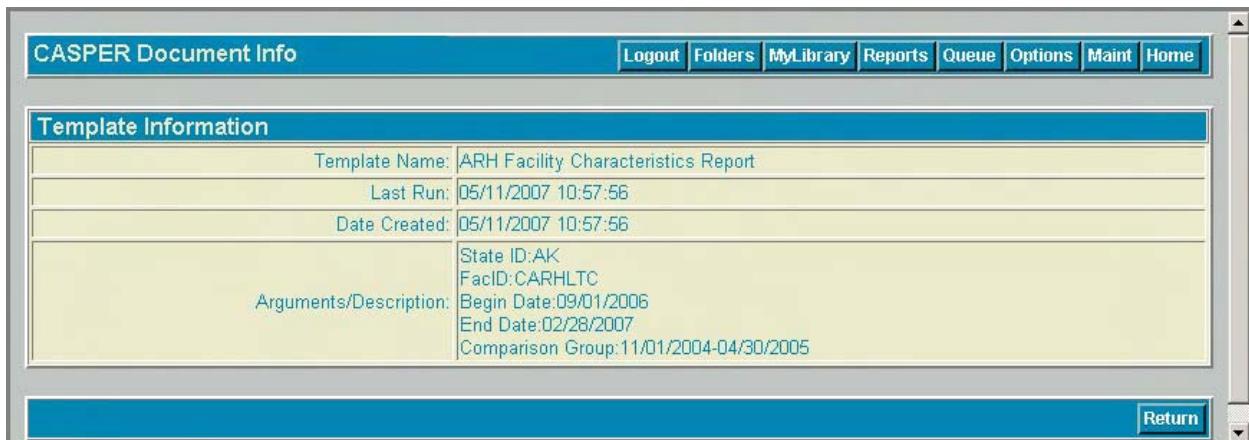
Select the template name link to view the **CASPER Reports Submit** criteria page(s) with the criteria options you previously saved. Review or modify the criteria as needed, using the **Next** button to advance through multiple pages, if present. You may save the template and/or submit the report from the final **CASPER Reports Submit** criteria page.

To view a synopsis of the saved criteria, with your mouse, point to and hover over the Info icon, , to the left of the template name. A **Report Arguments** pop-up box (Figure 2-17) containing the details of the saved criteria displays.



**Figure 2-17. Template Info – Report Arguments**

When you click the Info icon, the **CASPER Document Info** page (Figure 2-18) is presented for the associated template. This page displays the saved criteria selections in addition to the date the template was created and the date it was last run. If needed, you may use your browser's print function to print this page.



**Figure 2-18. CASPER Document Info Page**

## **Running Reports From Saved Criteria Templates**

To run one or more reports without first viewing or modifying the saved criteria, check the *Select* box(es) to the far right of the desired template(s) and select the **Rerun** button on the **CASPER My Library** page (Figure 2-16). All selected reports are placed into the queue for processing.

**NOTE:** Use the **SelectAll** button to place checks in the *Select* boxes for all of the templates in the selected folder. The **SelectAll** button then changes to an **UnSelectAll** button with which you may remove all checks in the *Select* boxes.

## **Moving Saved Criteria Templates**

1. To move one or more templates in the selected template folder to another template folder, check the *Select* box(es) to the far right of the desired template(s) and select the **Move** button on the **CASPER My Library** page (Figure 2-16). The **CASPER Template Move** page (Figure 2-19) displays with a list of the report(s) you selected.

Move From:	Template Name	Template Created
MDS Reports	ARH Facility Characteristics Report	05/11/2007 10:57:56
To: MDS Reports	CCM Facility Characteristics Report	05/11/2007 10:58:19

**Figure 2-19. CASPER Template Move Page**

2. Open the drop-down list and highlight the template folder to which you wish to move the selected template(s). Select the **Save** button.

From the **CASPER Template Move** page, you may also change a template name. Select a template displayed under the *Template Name* heading and type a new name. When all changes are complete, select the **Save** button to retain the change.

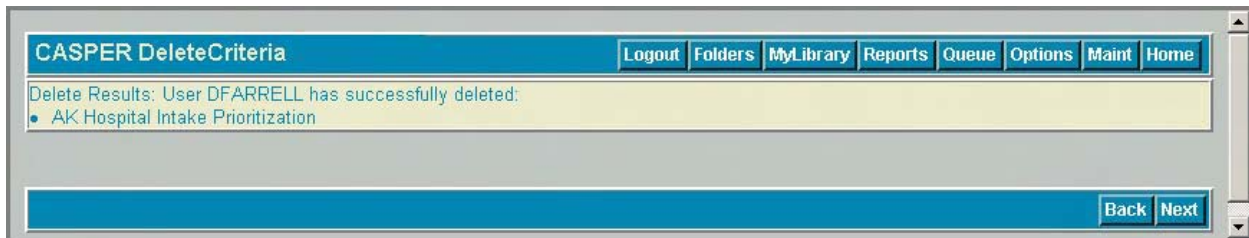
## Deleting Saved Criteria Templates

1. To delete one or more templates, check the *Select* box(es) to the far right of the desired template(s) and select the **Delete** button on the **CASPER My Library** page (Figure 2-16). A delete confirmation dialog box (Figure 2-20) is presented.



**Figure 2-20. Delete Confirmation**

2. Select the **OK** button to confirm the delete request. The **CASPER DeleteCriteria** page (Figure 2-21) is presented indicating the template(s) you successfully deleted.



**Figure 2-21. CASPER DeleteCriteria Page**

**NOTE:** Upon deletion of all saved criteria templates from a template folder, the system automatically deletes the template folder.