



Dental Services

NHS Dental Services

E Reporting Good Practice Guide

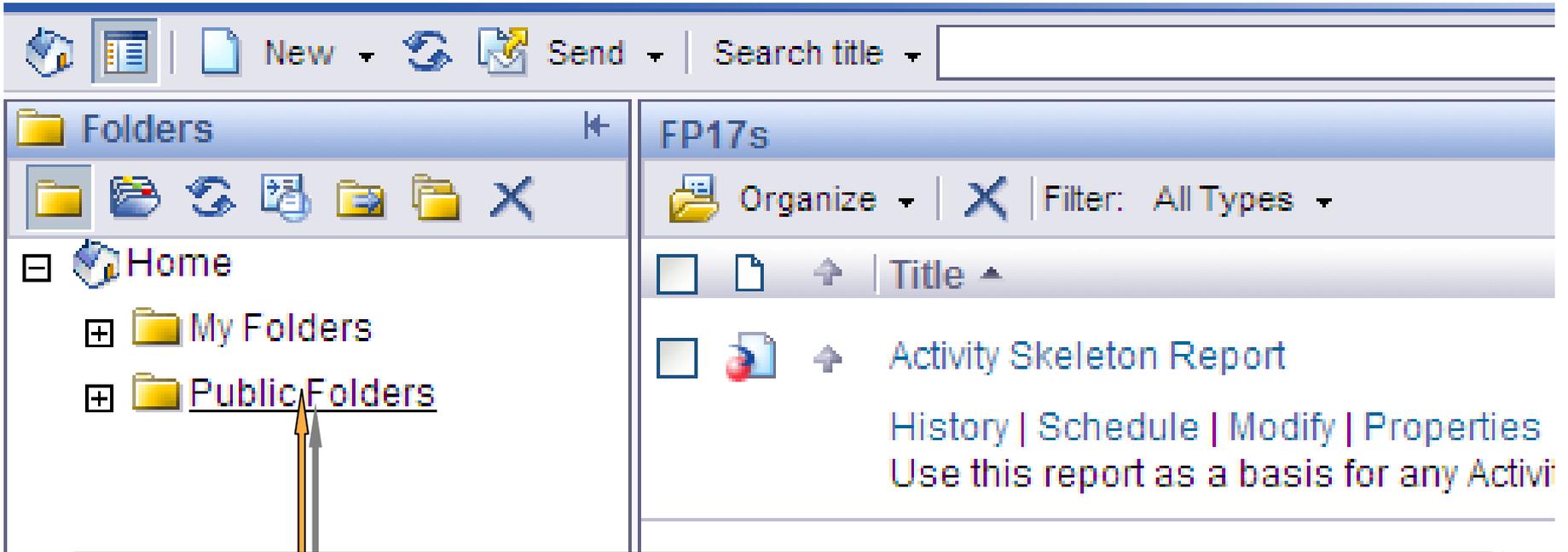
Saving a Template to be amended

Supporting the NHS, supplying the NHS, protecting the NHS

NHS Dental Services is a service provided by the NHS Business Services Authority



Nature of Templates

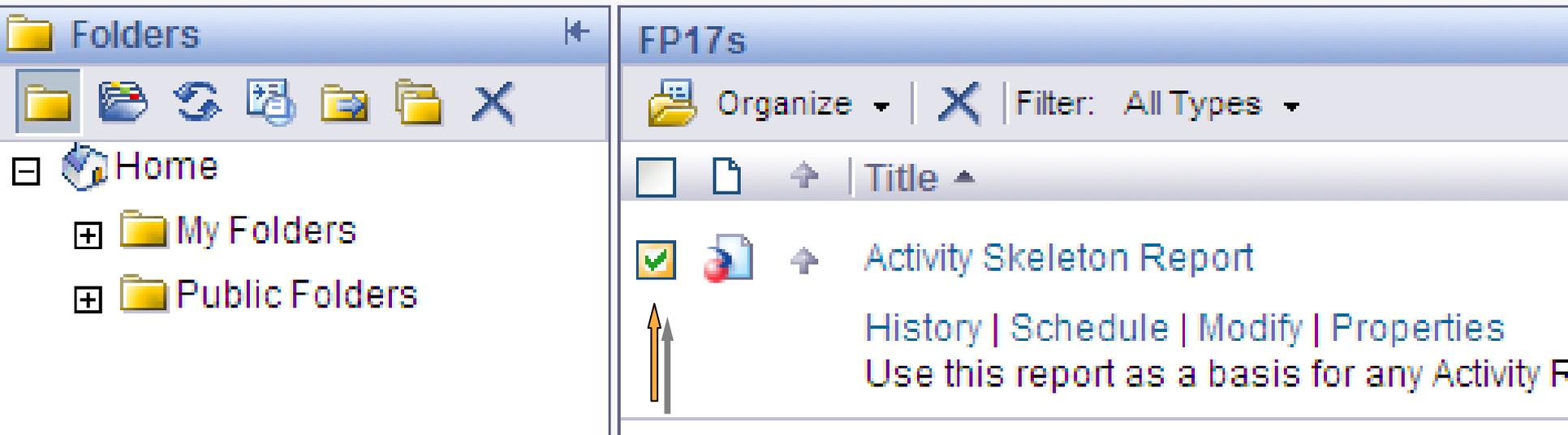


Templates in e-reporting are predesigned reports located in “**Public Folders**”. They cannot be changed or altered by a user, only refreshed.

To alter or modify a template the user must take a copy and place that copy in their own folders (“**My Folders**”), then it becomes their own template to alter as they require.



Saving a Copy of a Template



Click on the of the template (s) which you wish to save

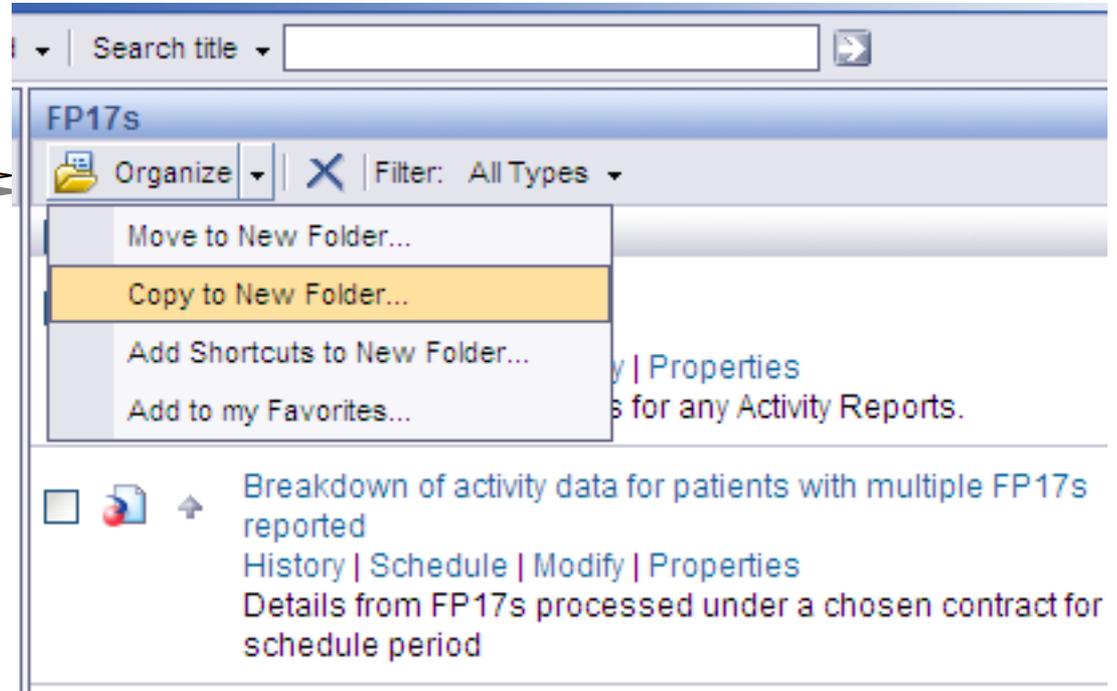


You only need to save a template in this way if you wish to alter or modify it. If you want to just save the results after running a template see the instructions in Using Templates

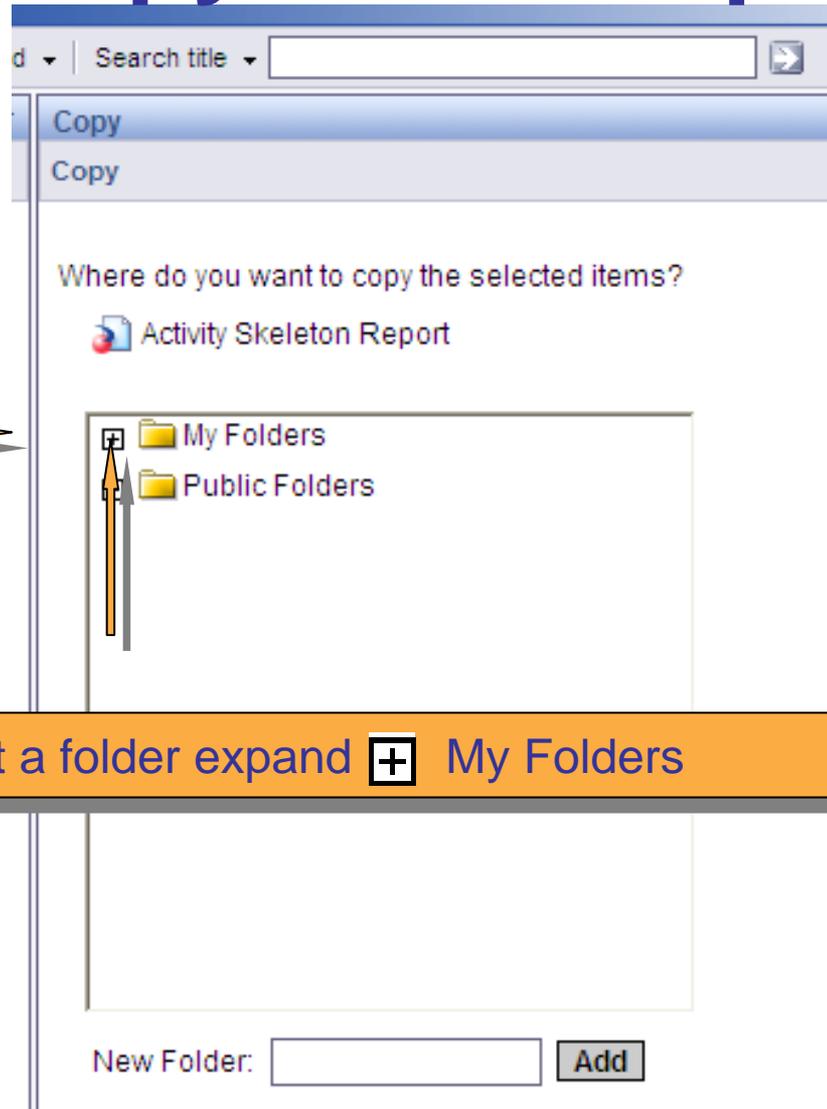


Saving a Copy of a Template

Click on  Organize
Then select Copy to
New Folder



Saving a Copy of a Template



Copies of templates can only be saved in "My Folders"

To select a folder expand  My Folders



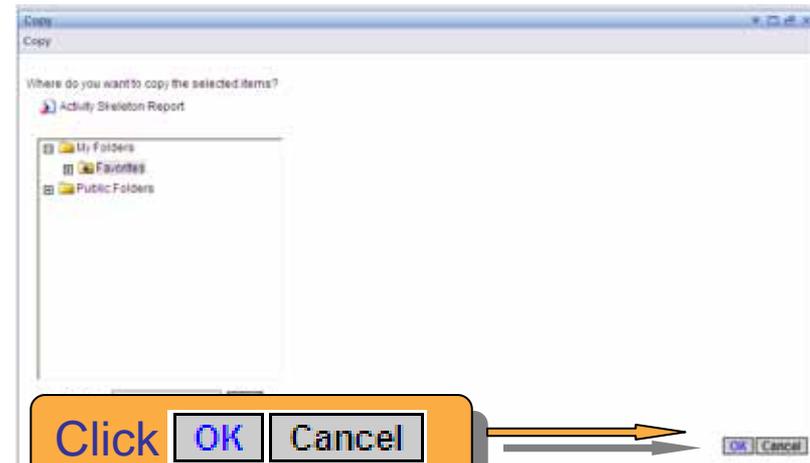
Saving a Copy of a Template

Click on Favourites

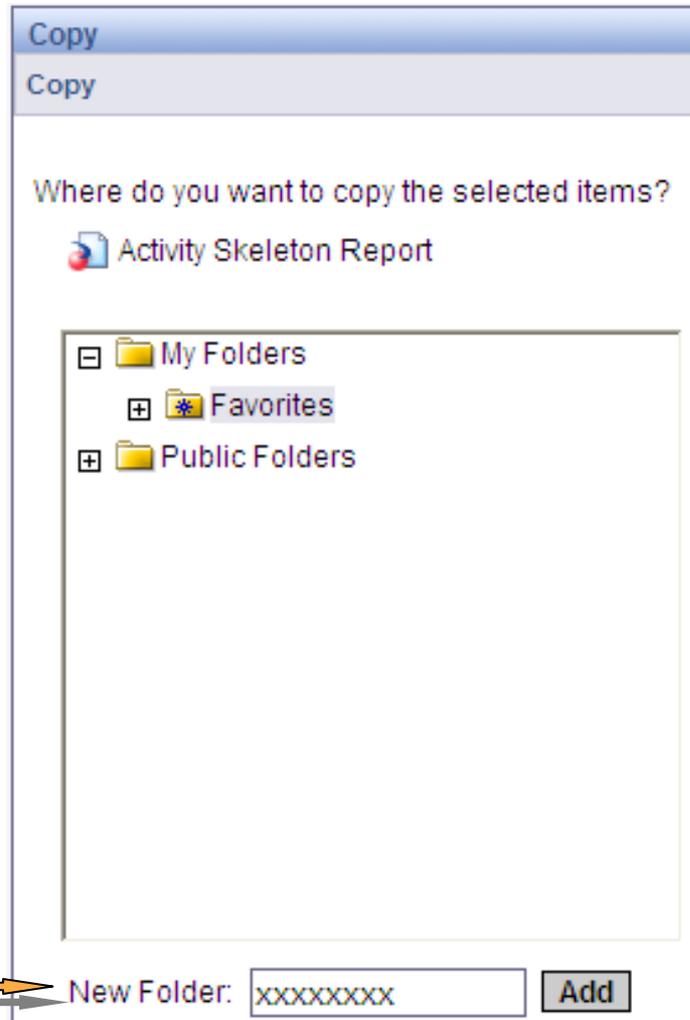


Once Favorites is highlighted grey

This has saved a copy of the template into the Favorites folder. However if you are saving many templates you may want to organise these into folders.

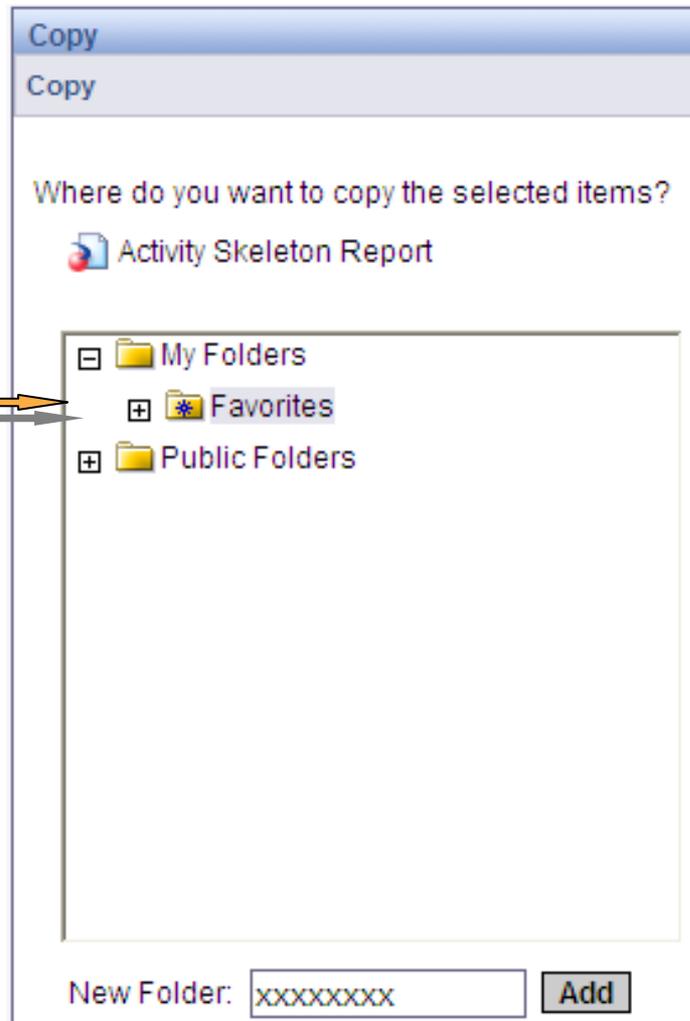


Adding a New Folder



To create a new folder to save a template into, when asked where you want to save the selected items, type the name of the folder and press Add

Saving a Copy of a Template



This folder will then appear in Favorites when expanded 



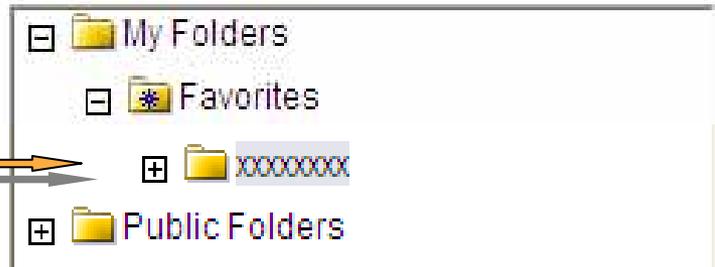
Saving a Copy of a Template

Copy

Where do you want to copy the selected items?

Activity Skeleton Report

To save the template into this folder, highlight it



New Folder:

Click

