

Build Once. Use Often.

A Framework for Sustainable Reporting Templates

Why Templates?

Saves time ~ Consistent Reports ~ Improved Accuracy ~ Less Guesswork ~
Shared Standards ~ Increased Confidence



NAMING CONVENTIONS

Report Purpose + TEMPLATE + User Initials

OPTIONAL: Associate a *Term* in the name

EXAMPLES

- Midterm/Final Grades FA26
TEMPLATE - ETSU
- Incomplete Journeys TEMPLATE -
ETSU
- Academic Alerts TEMPLATE - ETSU

WHEN TO SAVE A REPORT

Will I Run this Report Again?

- Every term
- Every week or month
- A list that's being tracked
- Shared among staff team

✓ Yes

- One-time, ad hoc query

✗ No

TEMPLATE MAINTENANCE

- Confirm *Logic & Filters*
- Review reports each term to *Update Report* or *Save as a New Report* when updating filters
- Delete unused templates or outdated reports

ETSU BEST PRACTICE

For frequently visited or term-based reports, save your report as a **TEMPLATE**. Templates preserved *Logic & Filters*, improve consistency, reduce rebuild time, and increase reporting confidence.

