

How to Use Forms

Last Modified on 06/04/2018 1:41 pm EDT

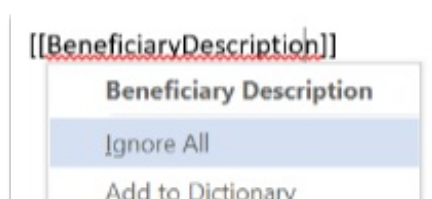
The "Forms" tab in DevResults offers some basic tools to help you create reports in Microsoft Word. This tool was designed for users who frequently need to produce reports or other paperwork for their activities.

Forms in DevResults work a lot like Microsoft Word's Mail Merge. First, you create a document with any kind of formatting and fixed text. Then you add specific field names which act as placeholders. The placeholders are replaced with information from DevResults when you download the form.

When you download a form, you get a Word document with any headings/logos/formatting/text that you designed, but with up-to-date information filled in about an activity.

How to Make a Form Template

1. Make the Word document that will be populated with DevResults information.
2. Add placeholders for the information that should be populated from DevResults. All you have to do is write those placeholders in double brackets, like `[[this]]`. For a list of the field names that serve as placeholders, please see [Form Templates: Activity](#), [Form Templates: Indicator](#), and [Form Templates - Reporting Periods](#).
3. Importantly, you must click to **ignore spelling/grammar warnings in Word**. If any bracketed placeholder has a red or green squiggly underline due to Word's spelling or grammar check, right click on the bracketed placeholder and select "Ignore All". We are working to make this step unnecessary but at the moment those warnings



disrupt the Forms functionality.

4. Save the document as a Single File Web Page (*.mht, *.mhtml)
5. Upload your form to the Forms Templates page (under the Administration menu). Mark the form type as "Activity".
6. Now save time on repetitive paperwork by downloading your updated document the Forms tab of your activities.

Here's an example of a Word document designed to be a form in DevResults. Note the placeholders in `[[brackets]]`.

Grant Agreement Modification Notice [Compatibility Mode] - Word

FILE HOME INSERT DESIGN PAGE LAYOUT REFERENCES MAILINGS REVIEW VIEW ACROBAT Sign in

Paste Font Paragraph Styles

Cambria 11 A⁺ A⁻ Aa • AaBbCcDd • AaBbCc

Normal Note Number...

Form ABC-123

Grant Agreement Modification Notice

Ref	Grant Agreement between Fictitious Organization and [[Organizations_Title]]
Grant Activity Title	[[Title]]
Grant Agreement Number	[[ReferenceNumber]]

Dear [[Organizations_PrimaryContact]]:

With reference to the Grant Agreement that [[Organizations_Title]] entered into with Fictitious Organization, the Agreement is hereby modified as detailed below:

- Description of technical changes:
- (Total Commitment) is increased/decreased to read:
- Otherwise, all Basic Information and Terms & Conditions of the referenced Grant Agreement remain as stated without modification.

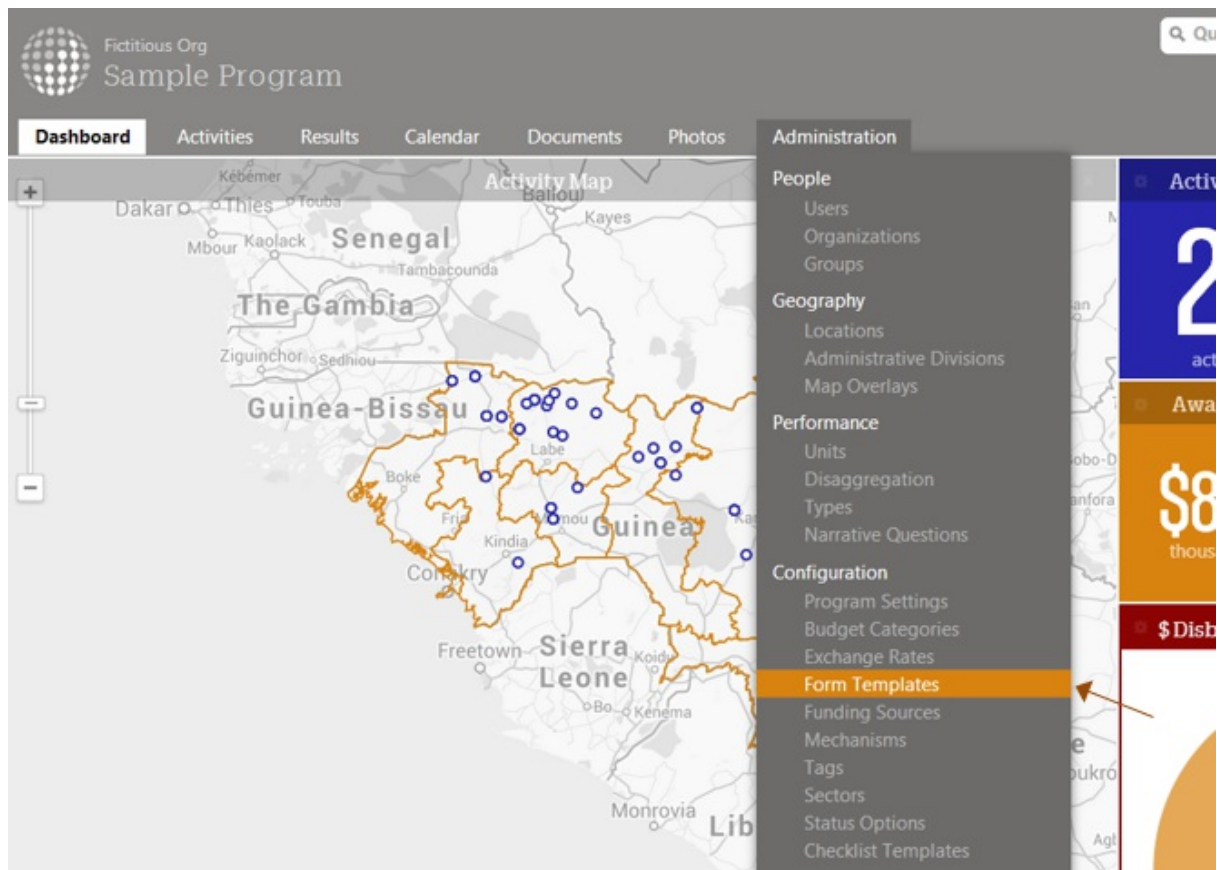
Statement of Agreement

If, after having reviewed all of the above modifications in your capacity as your organization's designated Agent, you fully and unconditionally agree with all of the above, you may enter into this Grant Agreement Modification with Fictitious Organization by affixing your signature and your organization's official seal below.

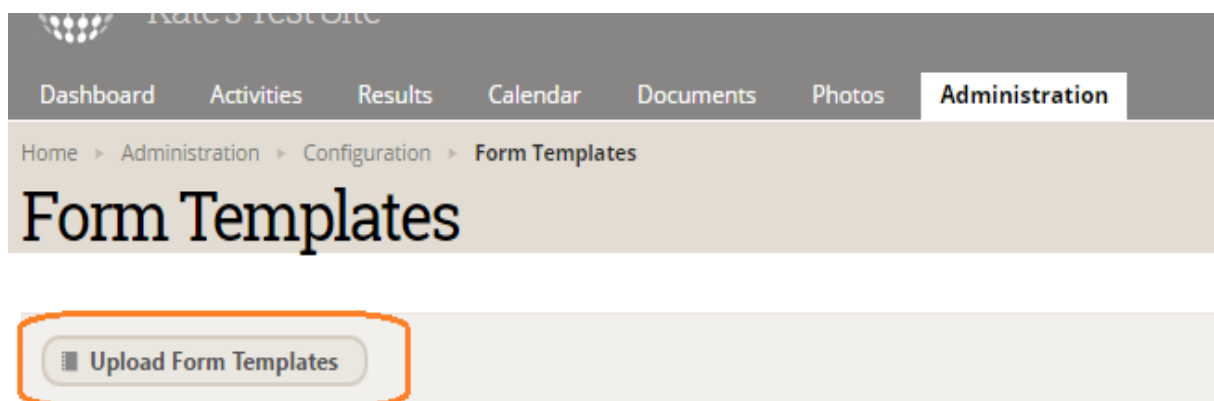
<p>On behalf of Grantee</p> <p>[[Organizations_PrimaryContact]]</p> <p>[[Organizations_PrimaryContactTitle]]</p> <p>[[Organizations_Title]]</p>	<p>_____</p> <p>Date</p>
<p>On behalf of Fictitious Organization:</p> <p>John Q. Doe</p> <p>Fictitious Organization Chief of Party</p>	<p>_____</p> <p>Date</p>

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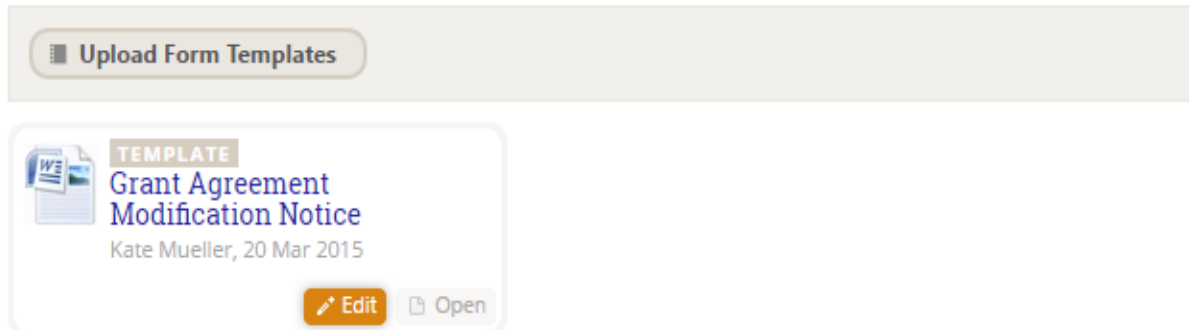
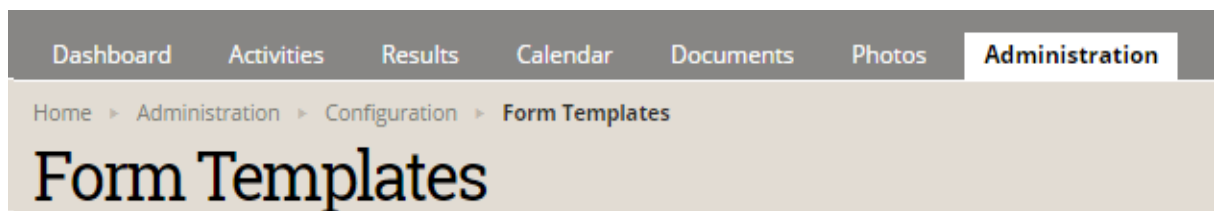
To add a form template to DevResults, go to the Administration menu and select Form Templates.



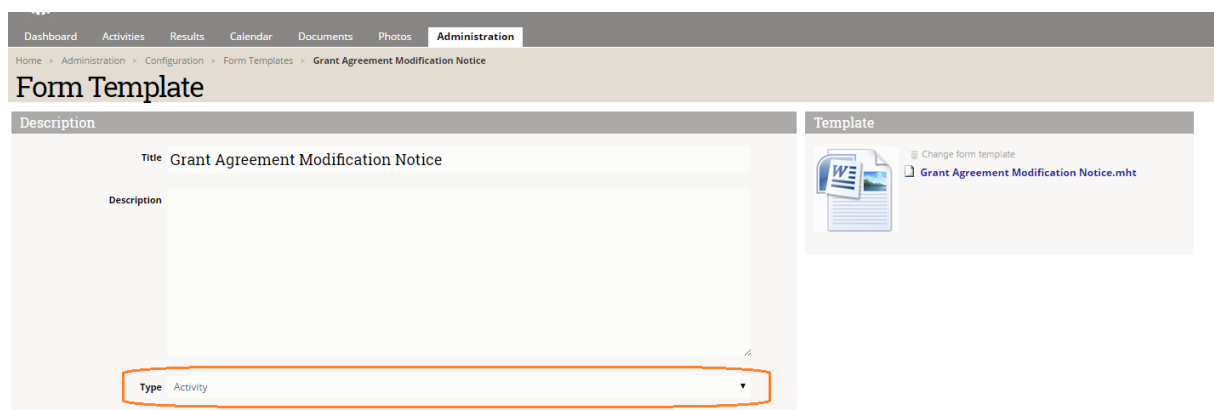
Click "Upload Form Templates" and select the Single File Web Page(*.mht, *.mhtml) you'd like to upload.



By default, all forms are created as **Activity Form Templates**. To change this or edit details for the template, hover over the template and click on the **Edit** button that appears.



Here, you can edit the Form Template **Title**, add a **Description** for the template or instructions for when to use it, and select the form template **Type**. "Activity" forms add a copy of the form template to each activity so it can be populated with any activity's information. "Activity (one reporting period)" forms add a copy of the form template to each activity/reporting period combination so it can be populated with the activity's information for each reporting period. For this example, we'll keep **Activity** selected.



Now go to the Activities tab and select your activity. Click on the Forms tab to see all the activity forms. Click on the form's hyperlink to automatically populate the Word document with the activity's information and download it.



Once downloaded, the `[[bracketed fields]]` in your template will be populated with your selected information.

Form ABC-123

Grant Agreement Modification

Ref	Grant Agreement between Fictitious Organization [[Organizations_Title]]
Grant Activity Title	[[Title]]
Grant Agreement Number	[[ReferenceNumber]]
Dear [[Organizations_PrimaryContact]]:	
With reference to the Grant Agreement that [[Organizations_Title]] entered into, the Agreement is hereby modified as detailed below:	

Form ABC-123

Grant Agreement Modificat

Ref	Grant Agreement between Fictitious Orgar Council
Grant Activity Title	Continuing Education for Teachers
Grant Agreement Number	W-107-901-OHQ-792
Dear Mariama Diallo:	
With reference to the Grant Agreement that Development Council entered into, the Agreement is hereby modified as detailed below:	

If you use Markdown to **format your text**, you can keep the formatting when you download the form by adding the following text to your `[[bracketed field]]`: `':FieldName;Markdown=True'`. For example, if you're trying to include Markdown formatting in the Objectives field, the `[[bracketed field]]` would look like this: `[[Objectives:Objectives;Markdown=True]]`

Note: If you are unable to complete this action, then you do not have permission to create forms. Please speak to your supervisor.

Didn't answer your question? Please email us at help@devresults.com.

Related Articles
