Add Multiple Reporting Periods

If you need to add many new reporting periods at once, instead of creating them individually, you can create new reporting periods in bulk by uploading a spreadsheet containing all their information.
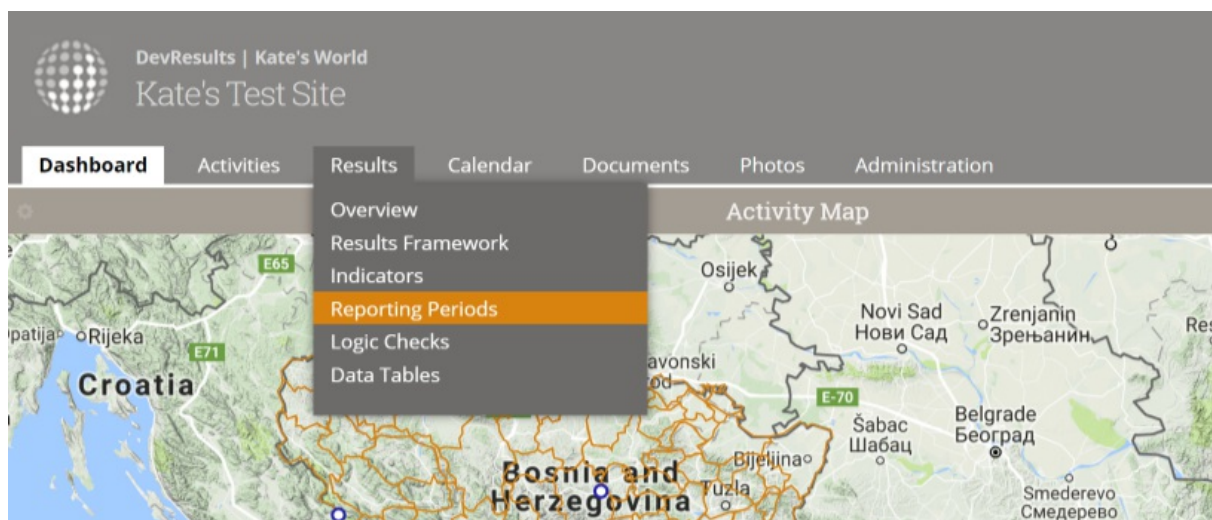
For the bulk import, you can upload **all columns** that you see in the Reporting Periods Index except for the **% Complete** column (which is calculated automatically based on Activity Reporting Period statuses).

You can use this functionality to:

1. **Create new reporting periods in bulk** (enter new rows in the spreadsheet; anything without a reportingPeriodID gets added)
2. **Edit existing organizations in bulk** (edit the spreadsheet as-is; anything with a reportingPeriodID gets updated)

Creating New Reporting Periods in Bulk

To create new reporting periods in bulk, first go to **Results->Reporting Periods** to open the Reporting Periods Index page.
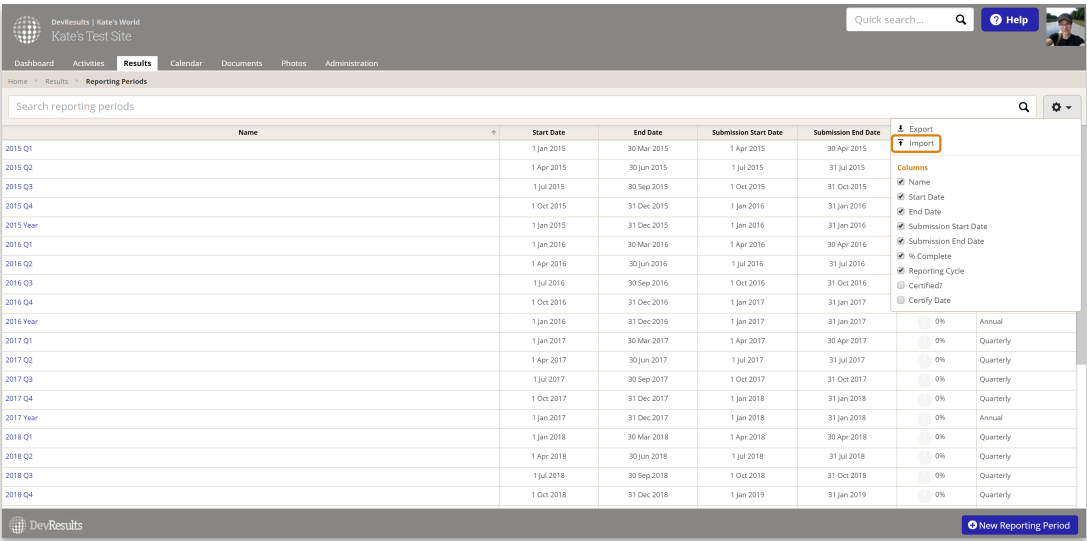

On this page, use the gear button in the upper right corner to select the columns you want to use:

Once you have the columns you'd like, click the gear button and select "Export" to get an Excel template of the displayed existing reporting periods:

You can delete all the rows from the export, but it's not necessary. Add the rows for your new reporting periods at the bottom with a **blank** reportingPeriodID:
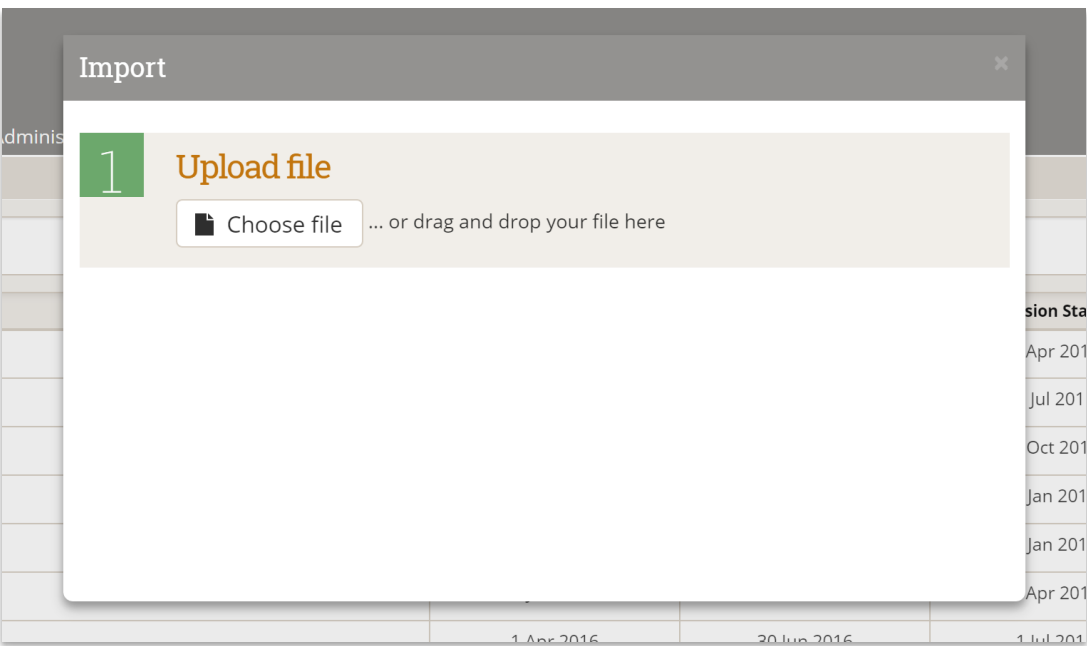
(The four rows highlighted with no reportingPeriodID are the new reporting periods this import will create.)

For new rows in the spreadsheet, you can only import **Reporting Cycles** that already exist in the system. To add new Reporting Cycles, see **Manage Reporting Cycles** .
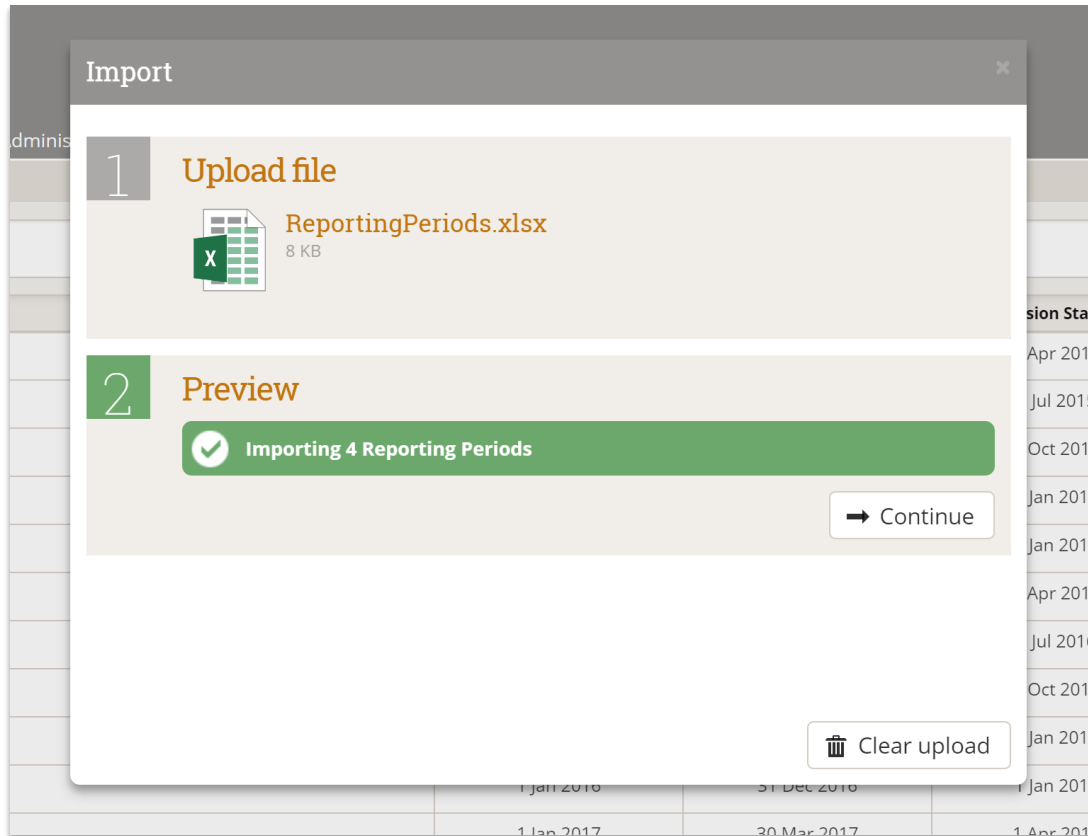
Once you have your spreadsheet updated and saved with the new reporting periods you want to add, click the gear icon again and select **Import**:

This will open a pop-up window to walk you through the upload process:
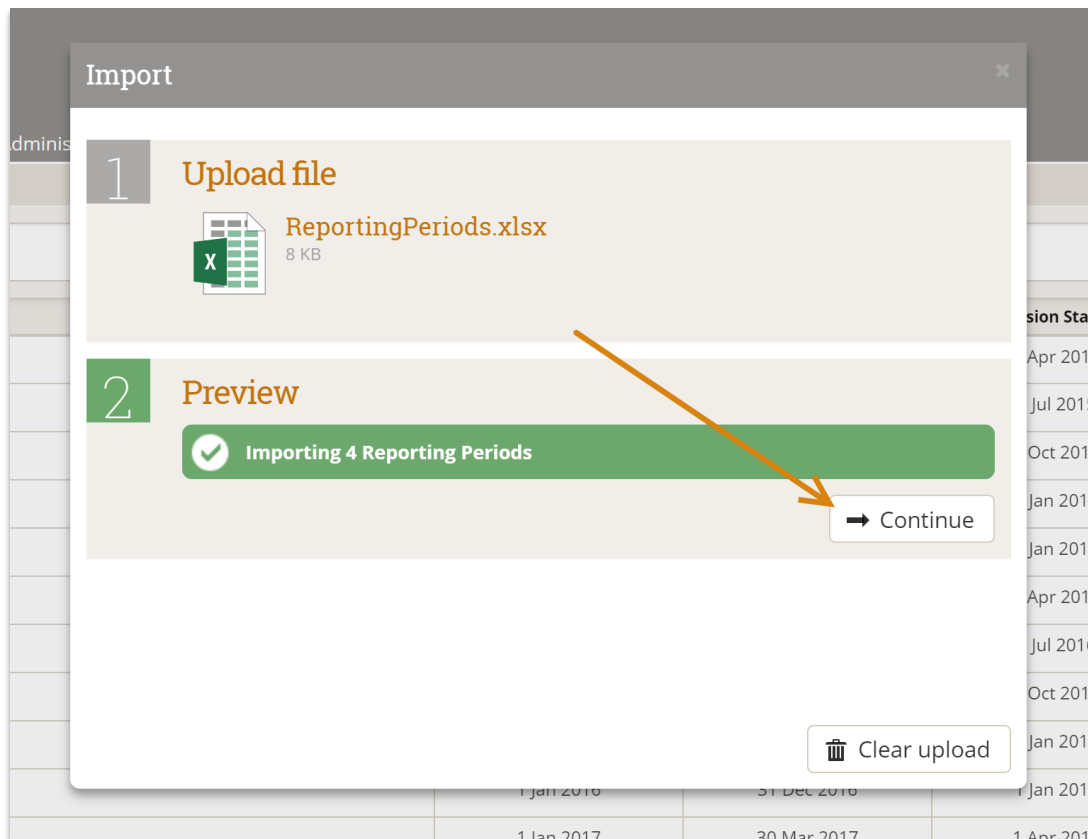
You can click the **Choose file** button to browse to the file or drag the file from your computer directly into this box and drop it here. The system will evaluate the spreadsheet for any invalid fields; it will warn you if it finds any problems with the sheet. If everything looks fine, you'll get a confirmation showing how many reporting periods it found and will import:
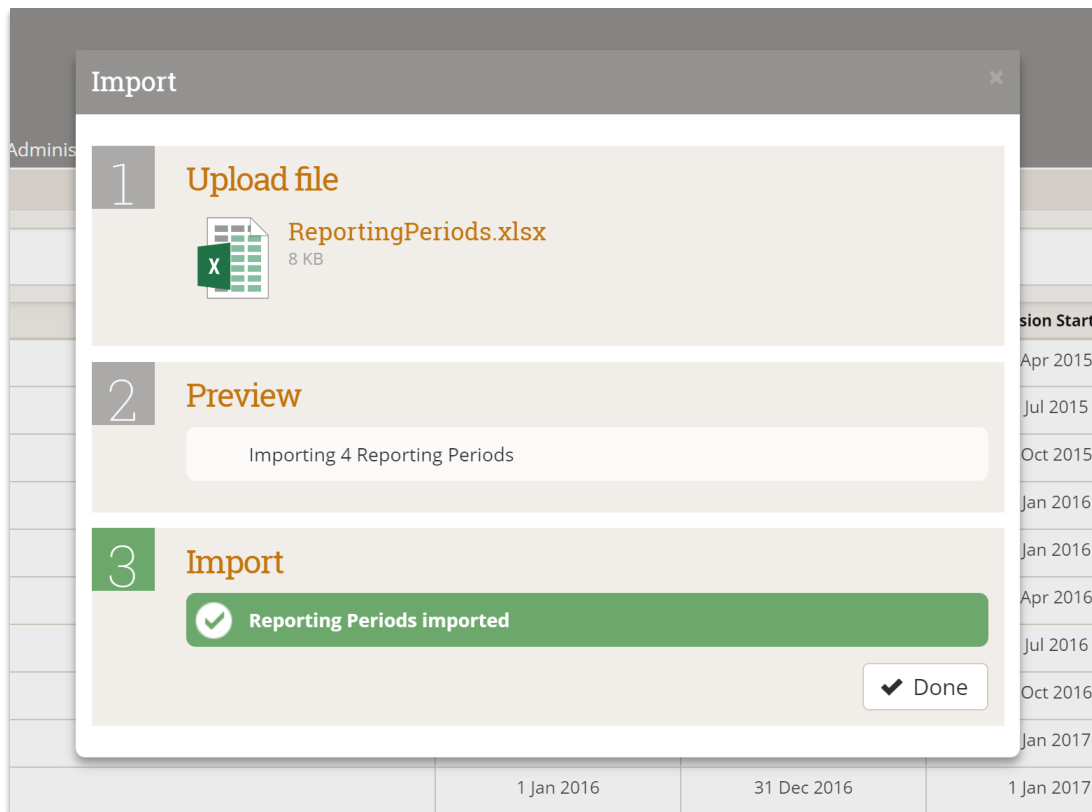

If the number for import looks wrong to you or you get errors that you need to fix, click the **Clear upload** button to remove the file, go edit and save it again, and then restart the process.

Once everything looks good, click the **Continue** button to complete the import:

You'll get a confirmation message once the import is complete; click the Done button to close it.

Once you click Done, your Reporting Peirods Index page will refresh and you'll see your new reporting periods there!

Editing Existing Reporting Periods in Bulk

You can also use this tool to complete bulk updates to existing reporting periods. To do so, follow the first few steps to download your Reporting Periods Index into Excel. Then edit the spreadsheet that you downloaded--for example, to change the submission window for multiple reporting periods, etc.

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

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