

How to Use Forms

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The "Forms" tab in DevResults offers some basic tools to help you create reports, briefings, letters, forms, or other paperwork in Microsoft Word.

Forms in DevResults work like Microsoft Word's Mail Merge. First, you create a template document that contains fixed text and appropriate formatting. 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 a project, an indicator, or a reporting period (for a single project).

- [How to Make a Form Template](#)
- [Formatting Dates](#)
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How to Make a Form Template

1. Create the Word document that will be populated with DevResults information.
2. Add placeholders for the information that should be populated from DevResults. Include placeholders in double brackets like `[[this]]`. For a list of available placeholders, please see:
 - [Form Templates: Project](#)
 - [Form Templates: Reporting Periods](#)
 - [Form Templates: Indicator](#)
3. **Save the document as a Single File Web Page (*.mht, *.mhtml).**
4. Upload your form to the **Tools > Form Templates** page.
5. Define the form template **type** as Project, Project (One Reporting Period), or Indicator.
6. Now save time on repetitive paperwork by downloading your updated document the Forms tab of your project, a project's reporting period, or an indicator.

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

Clipboard Paste Font Paragraph Styles

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.

On behalf of Grantee
[[Organizations_PrimaryContact]]
[[Organizations_PrimaryContactTitle]]
[[Organizations_Title]]

Date

On behalf of Fictitious Organization:
John Q. Doe
Fictitious Organization Chief of Party

Date

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

Example Organization
DevResults

Data Program Info Tools Administration Bookmarks

Home Program Info Activities

46 of 46 activities shown

Geography Status Framework Sector Tag Staff Primary organization Awarding organization Activity is:

Calendar
Change History
Checklist Templates
Custom Queries
Diagnostics
Documents
Form Templates
Logic Checks
Photos
System Announcements

activities

★ Bookmark Assign in

to School Lunches

ssing Corruption in Local Govern

g AX

☐ Apprendre à Lire

☐ Bednets Distribution Program

☐ Better Health Alliance

☐ Building Responsiveness In Local Gover

☐ Business Infrastructure Revitalization P

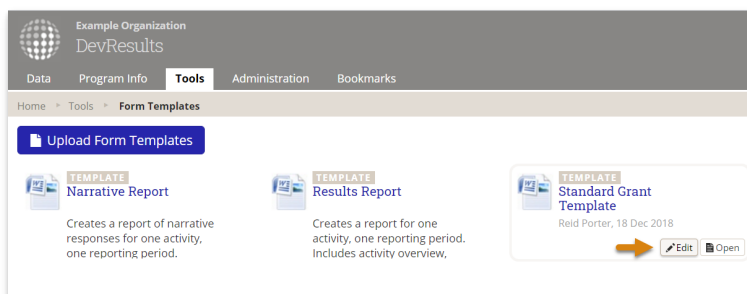
☐ Capable Local Governance

☐ Capacity Development in Rural Areas

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



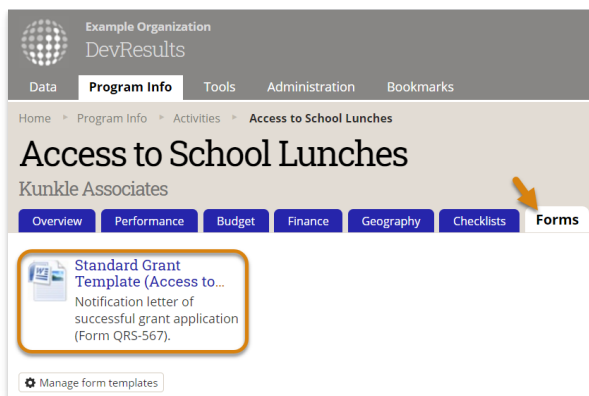
By default, all forms are created as **Project Form Templates**. To change this or edit details for the template, hover over the template and click on the **Edit** button that appears.



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**. "Project" forms add a copy of the form template to each project so it can be populated with any project's information. "Project (one reporting period)" forms add a copy of the form template to each project/reporting period combination so it can be populated with the project's information for each reporting period. "Indicator" forms add a copy of the form template to each indicator so you can download a specific indicator's definition and details. For this example, we'll keep **Project** selected.

The screenshot shows the 'Form Template' edit page for the 'Standard Grant Template'. The page has a header with 'Example Organization DevResults' and a search bar. The breadcrumb trail is 'Home > Tools > Form Templates > Standard Grant Template'. The main heading is 'Form Template'. The page is divided into two sections: 'Description' and 'Template'. The 'Description' section has a 'Title' field with the value 'Standard Grant Template' and a 'Description' text area with the value 'Notification letter of successful grant application (Form QRS-567)'. The 'Template' section shows a Word document icon and a 'Change form template' button. At the bottom, there is a 'Type' dropdown menu with the value 'Activity'.

Now go **Program Info > Projects** and select your project from the index. Then, click on the **Forms** tab to see all the forms available for that project. Click on the form's hyperlink to automatically populate the Word document with the project's information and download it.



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

Formatting Dates

The default format for a date in DevResults is **d MMM yyyy**, e.g. 5 Feb 2021.

Any date in a form can be customized by adding the preferred format to your `[[bracketed field]]`.

For example:

- `[[Activity_StartDate:Format=M/d/yyyy]]` = 2/5/2021
- `[[Activity_StartDate:Format=dddd, MMM d, yyyy]]` = Friday, Feb 5, 2021
- `[[Activity_StartDate:Format=d/M/yy]]` = 5/2/21
- `[[Activity_StartDate:Format=dd MMMM yyyy]]` = 05 February 2021
- `[[Activity_StartDate:Format=yyyy-MM-dd]]` = 2021-02-05

Date codes available to assemble in the format you prefer:

- **d** - Day of month with no leading zero (e.g. 5 or 15)
- **dd** - Day of month with leading zero (e.g. 05 or 15)
- **ddd** - Three-letter day of week (e.g. Wed or Fri, English only)
- **dddd** - Full name of day of week (e.g. Wednesday or Friday, English only)
- **M** - Month number with no leading zero (e.g. 2 or 12)
- **MM** - Month number with leading zero (e.g. 02 or 12)
- **MMM** - Three-letter month (e.g. Feb or May, English only)
- **MMMM** - Full name of month (e.g. February or May, English only)
- **yy** - Two-letter year (e.g. 21)
- **yyyy** - Four-letter year (e.g. 2021)

Note: The M's in month codes must be capitalized or else they will represent minutes, which will probably be zero.

Formatting Text

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]]`:

```
:Markdown=True
```

For example, to include Markdown formatting in the project's Objectives field, the `[[bracketed field]]` would look like this:

```
[[Activity_Objectives:Markdown=True]]
```

A formatted narrative response field would look like this:

```
[[NarrativeResponse:NarrativeQuestions_Code=ExpectedResults;Markdown=True]]
```

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

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