

How to Use Forms

Last Modified on 03/04/2019 12:20 pm EST

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

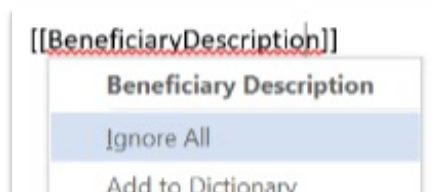
Forms in DevResults work like Microsoft Word's Mail Merge. First, you create a template document that contains fixed text and appropriate formatting. Then you add specific field names which act as placeholders. The placeholders are replaced with information from DevResults when you download the form.

NOTE: The formatted document should be saved as a .mht file before uploading to DevResults.

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

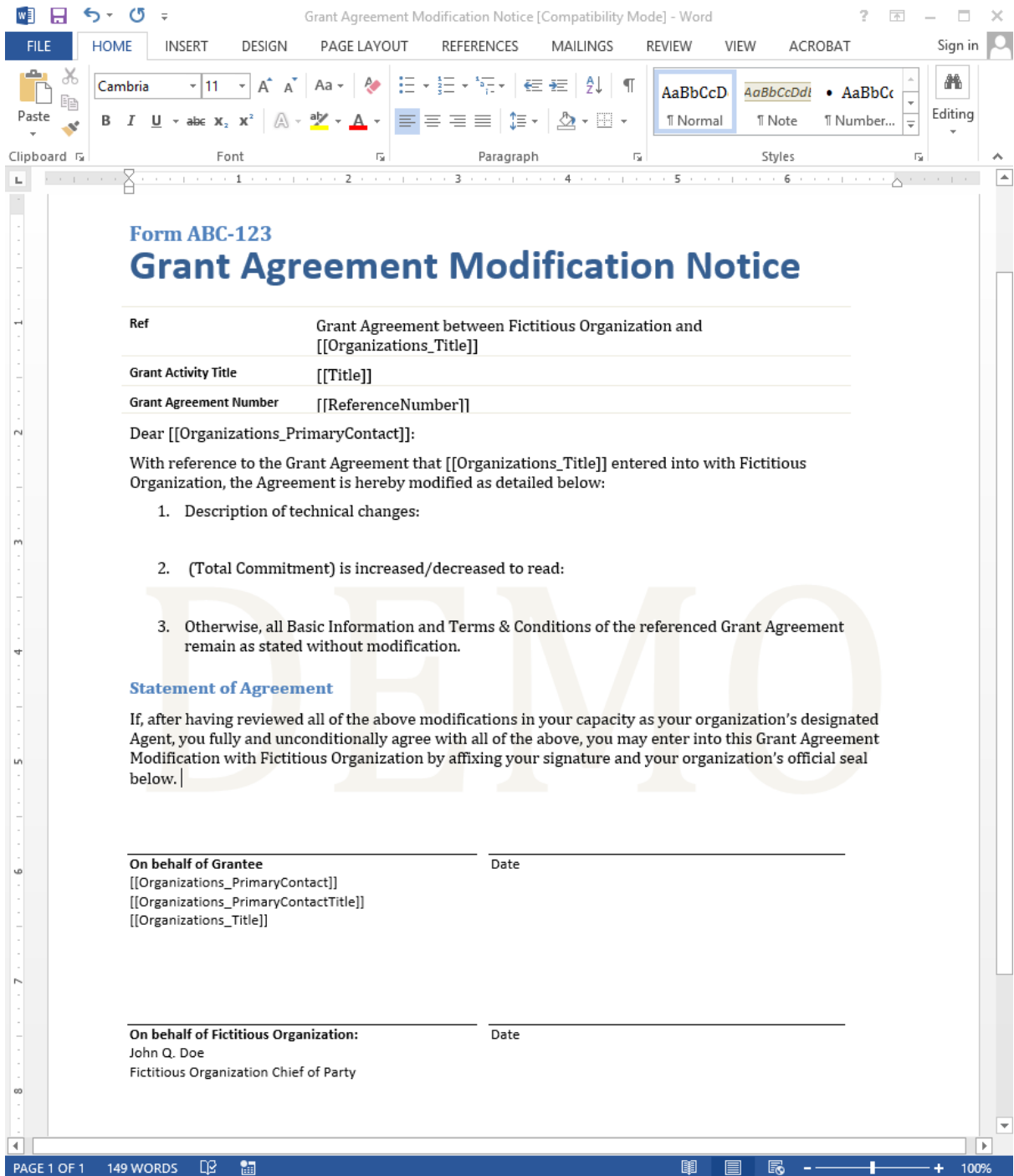
1. Make the Word document that will be populated with DevResults information.
2. Add placeholders for the information that should be populated from DevResults. All you have to do is write those placeholders in double brackets, like `[[this]]`. For a list of the field names that serve as placeholders, 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



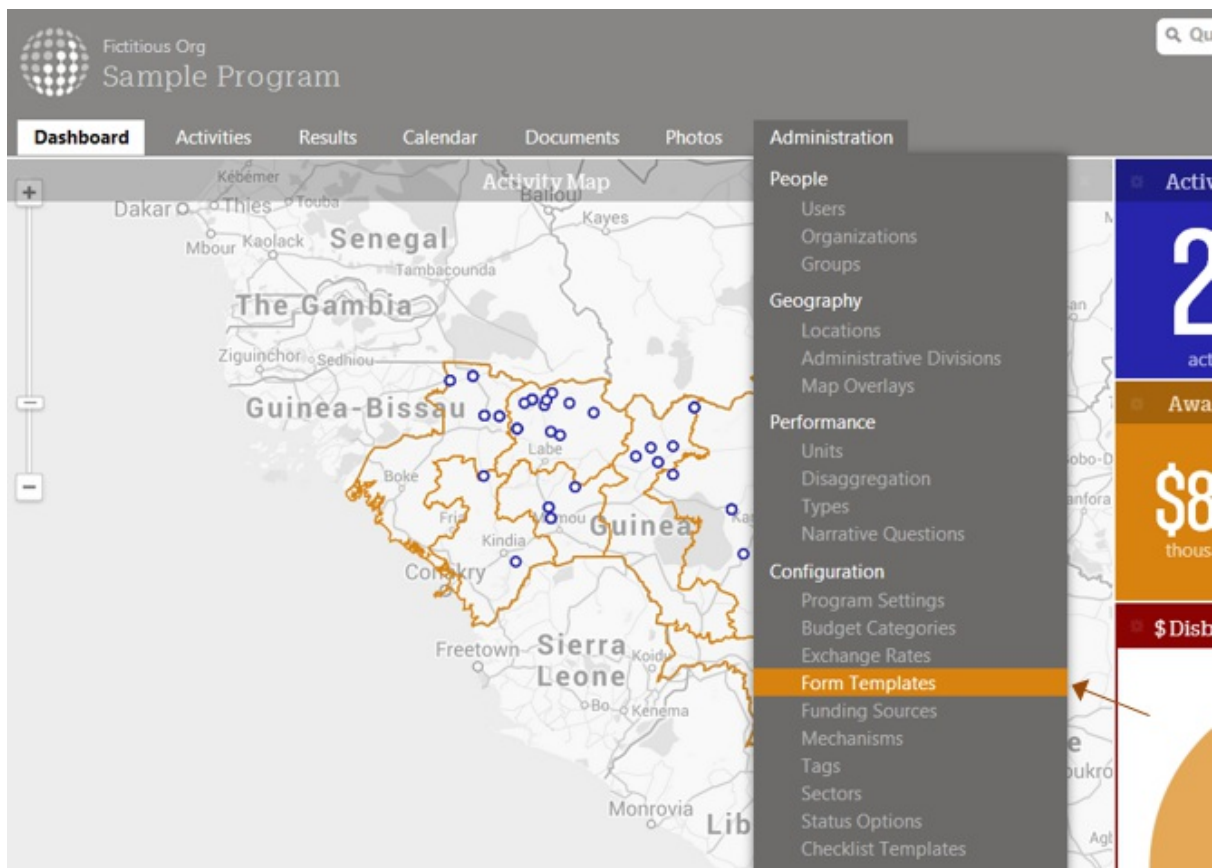
disrupt the Forms functionality.

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.

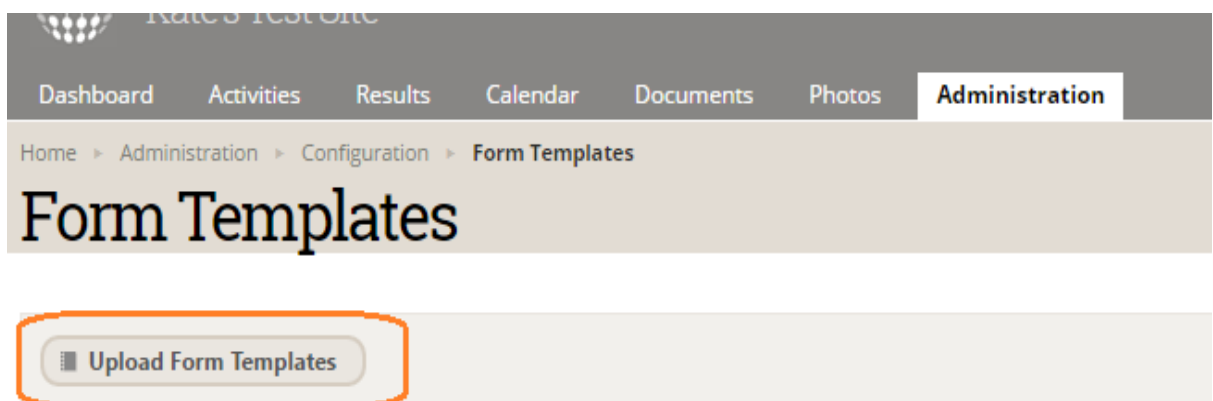
Here's an example of a Word document designed to be a form in DevResults. Note the placeholders in `[[brackets]]`.



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.

Dashboard Activities Results Calendar Documents Photos **Administration**

Home > Administration > Configuration > Form Templates

Form Templates

[Upload Form Templates](#)



TEMPLATE
Grant Agreement Modification Notice
Kate Mueller, 20 Mar 2015

[Edit](#) [Open](#)

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.

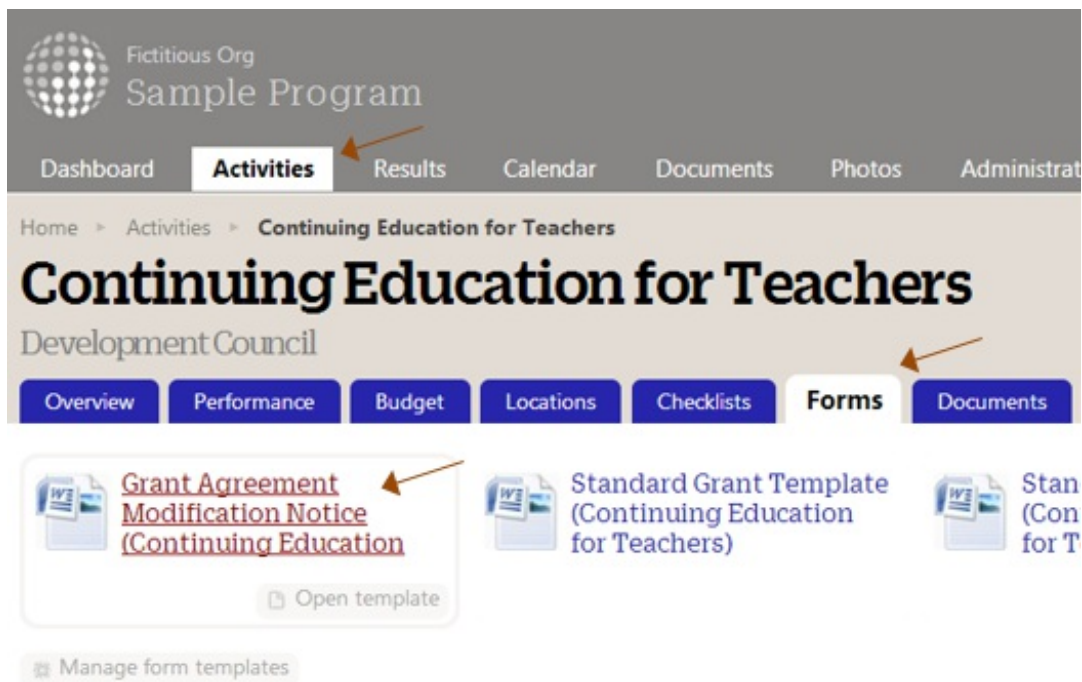
Dashboard Activities Results Calendar Documents Photos **Administration**

Home > Administration > Configuration > Form Templates > Grant Agreement Modification Notice

Form Template

Description	Template
<p>Title Grant Agreement Modification Notice</p> <p>Description</p> <p>Type Activity</p>	<p>Change form template</p> <p>Grant Agreement Modification Notice.mht</p>

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.

Exporting with Formatting

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 Activity's Objectives field, the `[[bracketed field]]` would look like this:

```
[[Awards_Objectives:Awards_Objectives;Markdown=True]]
```

The exception is for narrative response fields, where you don't repeat the field name. For example:

```
[[NarrativeResponse:NarrativeQuestions_Code=ExpectedResults;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
