Generate a report from a template

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Report templates turn information from DevResults into formatted documents. Choose a template, supply the information it asks for, and download the report. Each template defines the document's layout and which information it includes.

This article explains how to generate a report from a template that has already been set up for your site.

Before you start

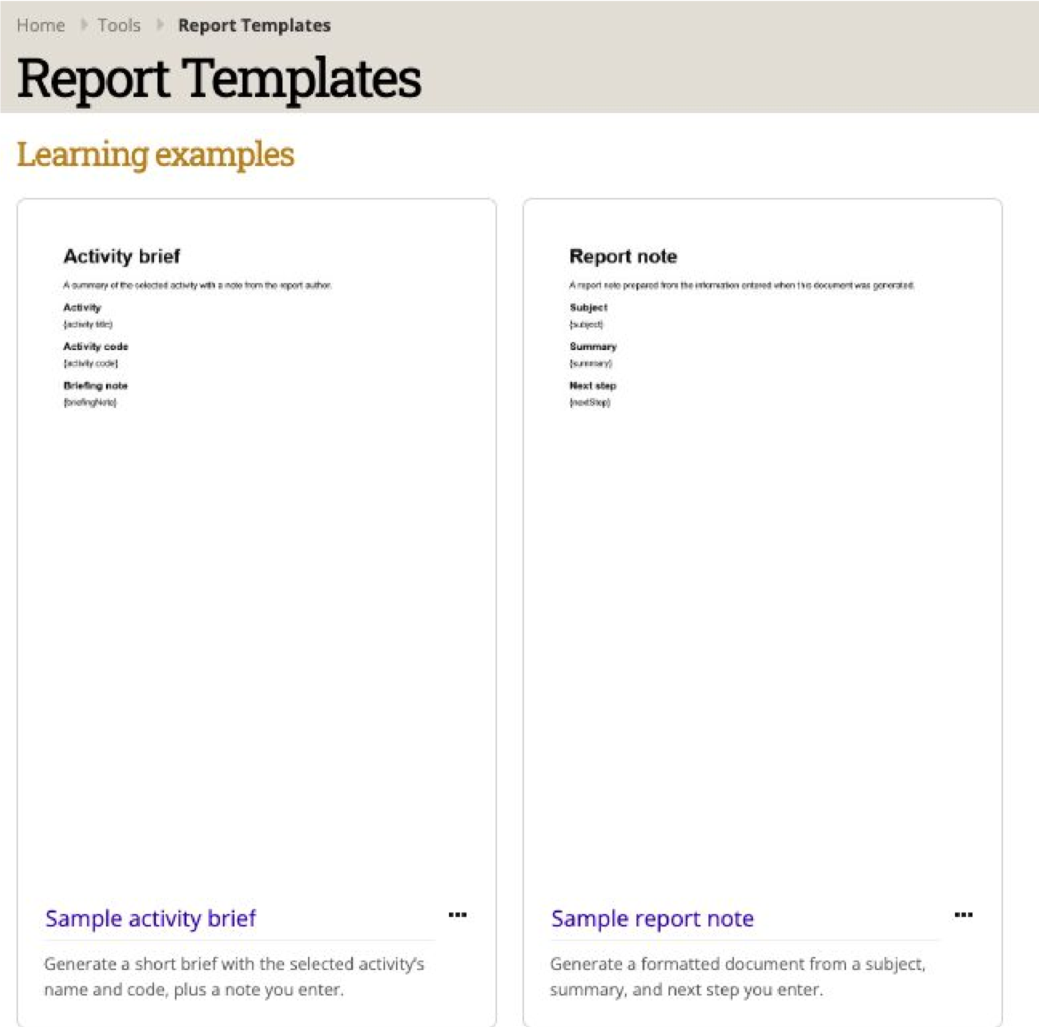
Your site must have Report Templates enabled, and your user account must have permission to use it. Some templates are available only to particular user groups. If you cannot find the page or a template you need, ask your site administrator to check your access.

The available templates and their questions depend on your site's setup. A template might ask you to select an activity, a reporting period, an indicator, or a contact. It might also ask you to enter text. Some templates need no inputs.

This article uses **activity** for the work you report on. Your site may use a different term, such as **project** or **award**.

Choose a template

1. Open **Tools > Report Templates**.
2. Read the template descriptions to find the report you need.
3. Click the template's title or thumbnail to open **Generate Report**. You can also open the template's actions menu and choose **Generate report**.



Choose a sample from the Learning examples category.

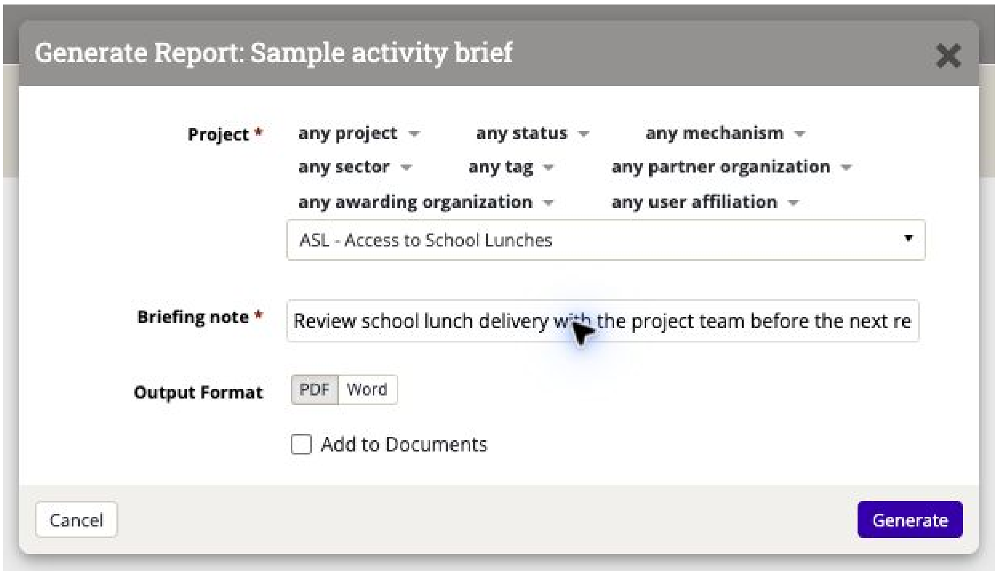
Supply the report inputs

Complete the fields in the **Generate Report** window. The fields come from the template, so another template may ask different questions.

If the report asks for both an activity and a reporting period, select the activity first. Then select the reporting period. Check both selections before generating the report.

If you opened a report from an activity or reporting-period page, some selections may already be set. Review the **For:** line to confirm the context.

If no inputs are needed, the window displays **No inputs are required to generate this report.** You can go straight to the output format.



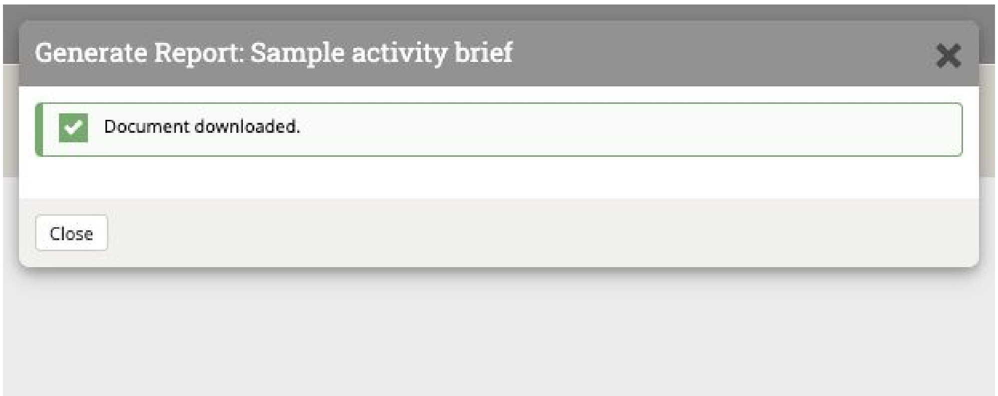
This example site calls activities Projects. Select the project and enter a briefing note.

Choose a format and download

For the Word templates shown here, **Output Format** offers **PDF** or **Word**.

Choose Word when you need to edit a Word report after downloading it. Choose PDF when you want the generated Word report in PDF format.

Click **Generate** and wait for the report to finish. When the window confirms that the document downloaded, open the file from your browser's downloads.



Review the document before sharing it. Check that it uses the intended activity and reporting period and includes the information you expect. If the underlying data changes, generate a new report to get an updated copy. Editing a downloaded document does not update the data in DevResults.

Save a copy in Documents

If **Add to Documents** appears, select it before clicking **Generate** to save a copy of the report in the selected activity's Documents as well as downloading it.

The option requires a selected activity, the Documents feature, and permission to edit that activity's Documents. It does not appear for every template or every user.

After generation, look for confirmation that the document was downloaded and added to Documents. To find the saved copy, open the activity's **Documents** and look in the **Generated Reports** folder.

Certify a report

If the template allows certification and you have the **Report Template Certifier** role, the window includes a **Certify** option.

1. Complete and check the report inputs.
2. Select the **Certify** checkbox.
3. Read the statement that includes your name, then click its **Certify** button.
4. When the window shows **Certified**, click **Generate**.

Follow your organization's instructions about when to certify a report. How certification appears in the downloaded document depends on the template.

Troubleshoot a report

Problem	What to check
You cannot find Report Templates or a particular template.	Ask your administrator to check whether the feature is enabled, whether you have access, and whether the template is restricted to particular groups.
Generate is unavailable.	Complete required inputs. If you selected **Certify**, finish the certification confirmation.
You cannot choose a reporting period.	Select an activity first. If the period you need is still missing, ask your administrator to check the activity's reporting-period setup.
PDF is unavailable.	Check the template's source format. The current report-generation dialog offers PDF for Word templates.
A report has missing or unexpected information.	Check the inputs and the corresponding records in DevResults. Ask the person who maintains the template to check which information it includes.
Generation fails.	Record the template title, selected inputs, output format, and error message. Include these details when asking for help.
A downloaded file is missing from Documents.	Check whether you selected **Add to Documents** and whether the window confirmed that the file was added. Check the selected activity's **Generated Reports** folder.

Request a new or revised template

Contact your site administrator or the person who manages your report templates. Explain who will use the report, which information it should include, and what the finished document should look like. Include an example of the desired layout if you have one.

To create or maintain a template yourself, see **Create and update report templates**, including the placeholder syntax reference.

Related tools

- **MultiMatrix** lets you arrange and analyze results for multiple indicators.
- **How to use Forms** covers the separate Forms tool and its form templates.

Still need help? Email **help@devresults.com**.

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

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