

Templated Reports Overview

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Overview

The **Templated Reports** feature is a powerful new export option that enables Orgs to generate highly customized Microsoft Word documents directly from their Resolver report data. With this feature, users can match corporate branding requirements on exported reports while reducing manual formatting efforts.

With **Templated Reports**, Administrators can upload a `.docx` Word template to a report's configuration and define data placeholders that will be automatically populated at export time—just like mail merge, but tailored to an Org's data structure in Resolver.



Note:

Currently, this feature supports limited data volume on exports. Please contact your CSM or Kroll practitioner if you're interested in enabling this feature.

Key Capabilities

- **Word template upload:** Administrators can upload a `.docx` file (up to 20MB) as a template for exporting report data.
- **Placeholder mapping:** Use squiggly-bracket syntax (`{variableName}`) to insert data placeholders in the template.
- **Repeatable sections:** Dynamically repeat sections in the template using `{ #collectionName } ... { /collectionName }` syntax.
- **Data series mapping:** Map variables from one or more data series to your template placeholders, including fields, properties, workflow states, and more.
- **Validation tools:** Ensure all placeholders and variables are correctly and uniquely mapped before generating the export.
- **Export experience:** Users can now choose between a standard Word export and a Templated Report export (if configured).

User Account Requirements

The user must have Administrator permissions to configure Templated Reports.

Related Information/Setup

Please refer to the following articles for help with using Templated Reports in Resolver:

- [Creating a Report Template](#)
- [Uploading a Report Template](#)
- [Export a Report](#)