

Uploading a Report Template

Last Modified on 05/23/2025 1:07 pm ED7

Overview

After creating a report template using Microsoft Word, Administrators must upload the template into their Org to verify the file.

User Account Requirements

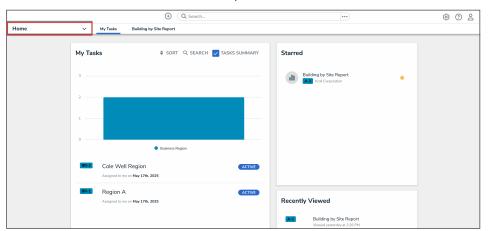
The user must have Administrator permissions to configure Templated Reports.

Related Information/Setup

Please refer to the Templated Reports section for more information on Templated Reports.

Navigation

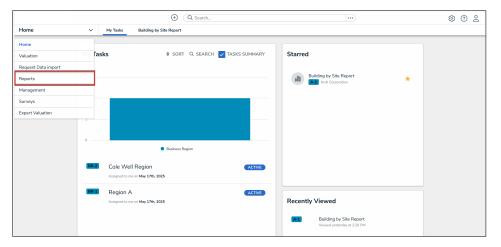
1. From the *Home* screen, click the **Home** drop-down menu.



Home Drop-down Menu

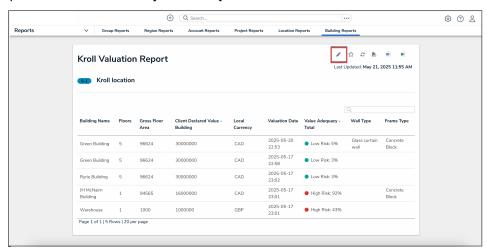
2. From the **Home** drop-down menu, select the **Reports** application.





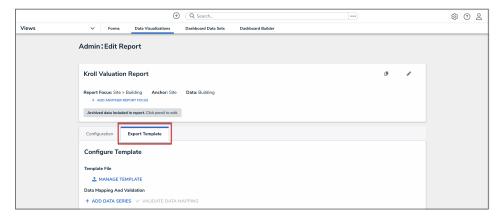
Reports Application

- 3. Click to open the report that you want to make a report template from.
- 4. On the report, click the **Edit Report Template** icon.



Edit Report Template Icon

5. From the *Edit Report* screen, click the **Export Template** tab.

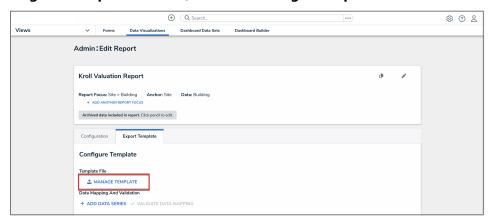


Export Template Tab

Uploading a Report Template

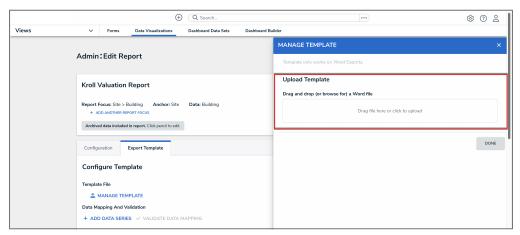


1. In the **Configure Template** section, click the **Manage Template** button.

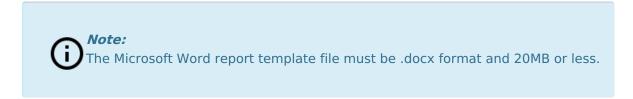


Manage Template Button

2. From the **Manage Template** pop-up, drag and drop or click to upload the report template Microsoft Word file.

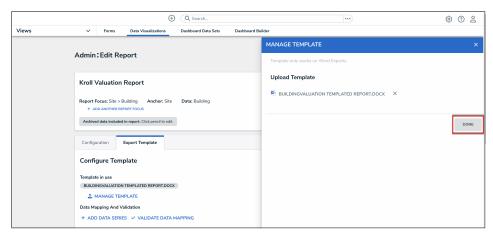


Manage Template Pop-up



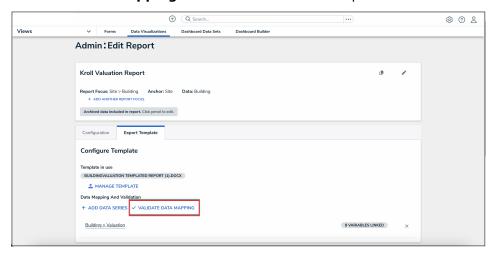
3. Click the **Done** button.





Done Button

4. Click the Validate Data Mapping button to validate the template.



Validate Data Mapping Button

- A blue **Validate in progress** banner will display to show that the validation is in progress.
- A red **Data mapping has errors** banner will display if there are any validation errors.
- A green Data successfully mapped to template banner will display if the validation is successful.