

Uploading a Report Template

Last Modified on 10/03/2025 4:32 pm EDT

Overview

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

User Account Requirements

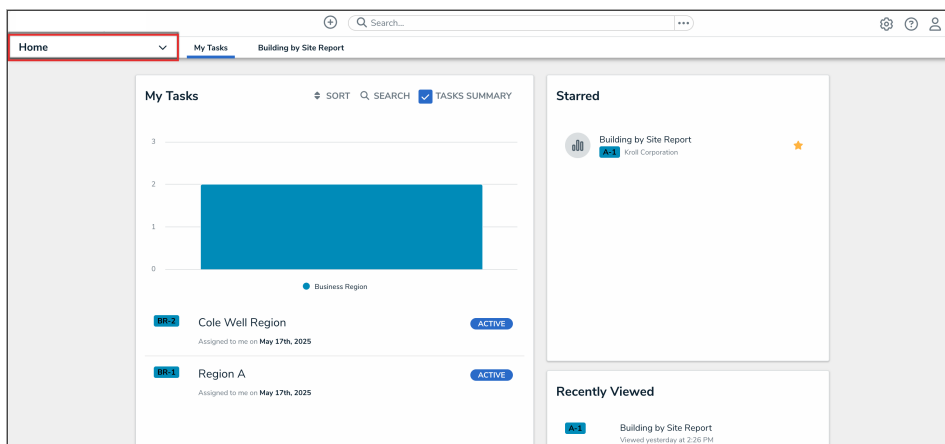
The user must have Administrator permissions to configure Templated Reports.

Related Information/Setup

Please refer to the [Templated Reports](#) section for more information on Templated Reports.

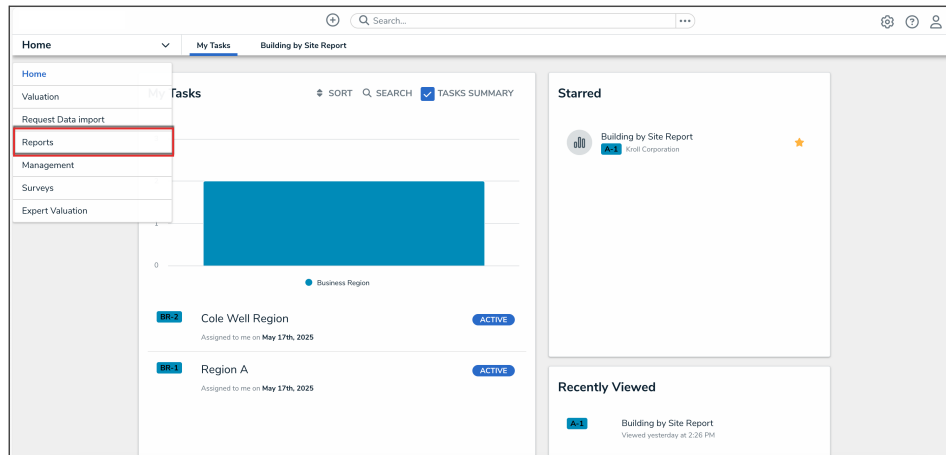
Navigation

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



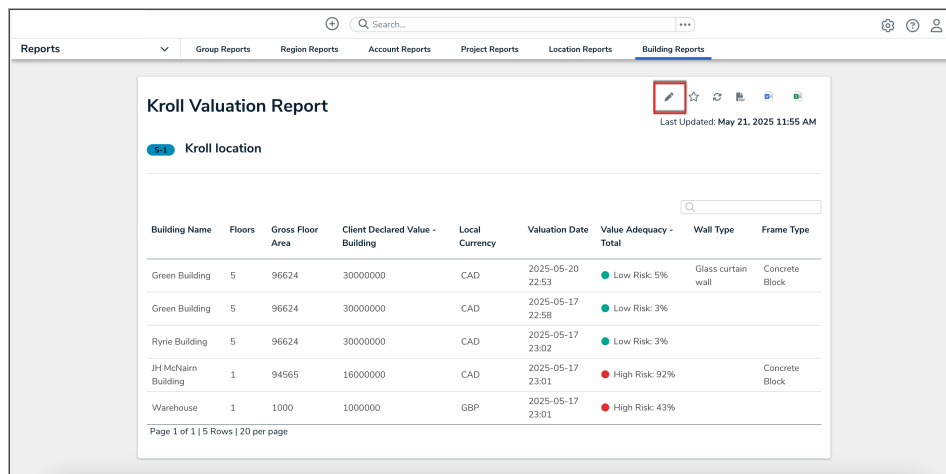
Home Drop-down Menu

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



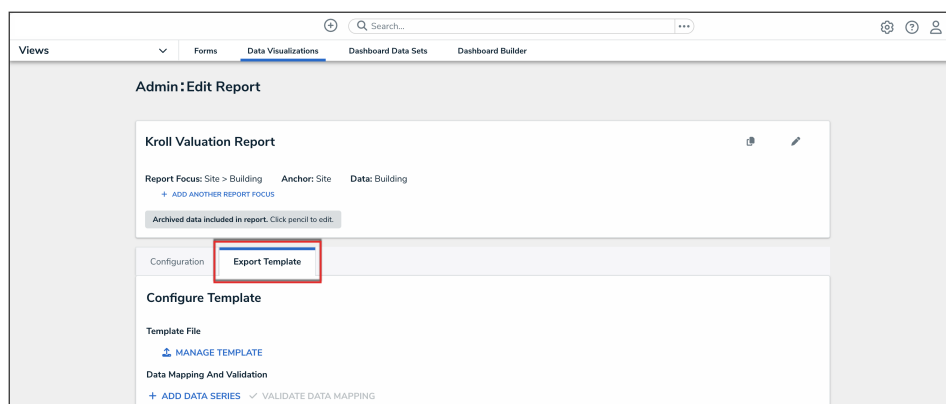
Reports Application

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

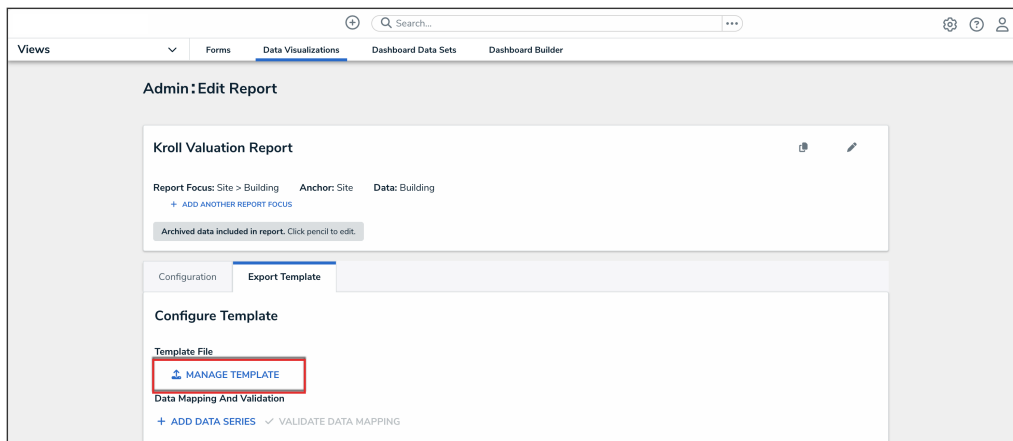
5. From the **Edit Report** screen, click the **Export Template** tab.



Export Template Tab

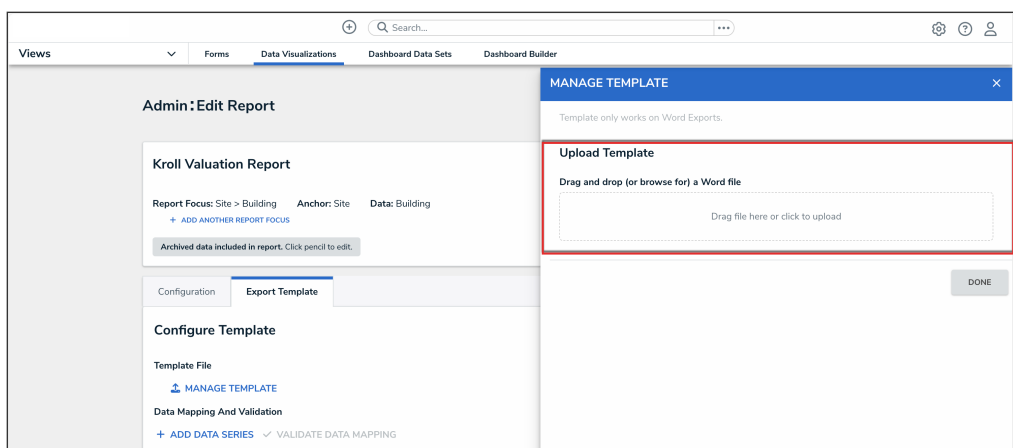
Uploading a Report Template

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.



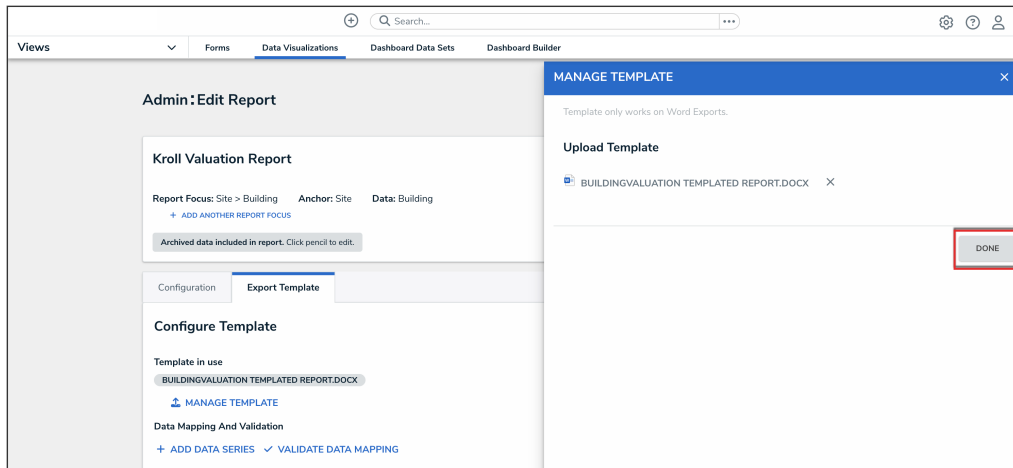
Manage Template Pop-up



Note:

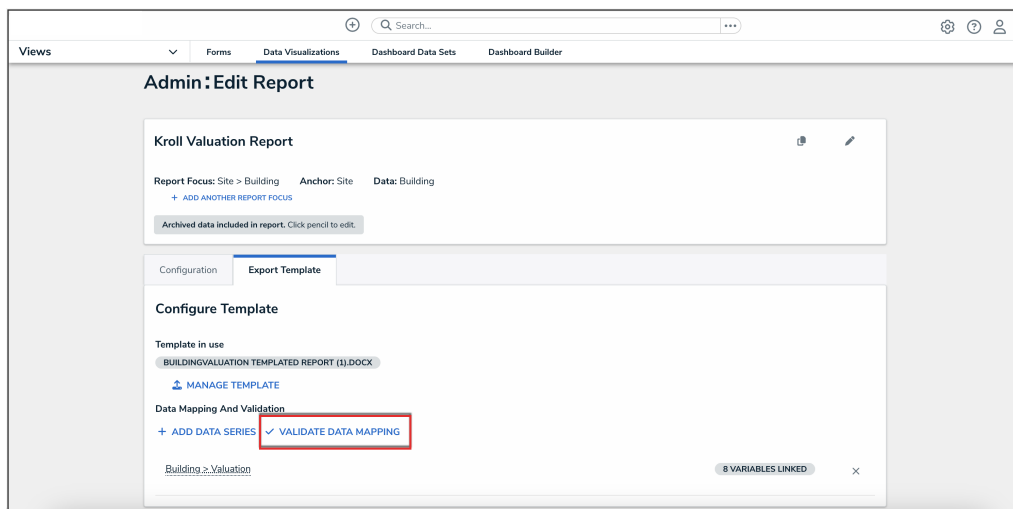
The Microsoft Word report template file must be .docx format and 20MB or less.

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.

Validate Data Mapping Data Verification

Running the Validate Date Mapping Function verifies if:

- Placeholder values are mapped to variables
- Placeholder value and Variable pairs are unique

It does not verify if:

- Required loop tab names exist in the template (e.g., {#Parent}, {#Child})
- Loop tag names are spelt correctly, case-sensitive, and properly nested
- Nested loop tag structures are correct
- Loop tag syntax is correct



Note:

*If you receive the **Uh oh. Something went wrong while exporting the report.**
Please wait a minute then try again error while exporting a report using the Export Templated Report option. Please attempt to manually validate the options listed above that are not verified during the Validate Data Mapping Function or contact the Support Team.*