Views

How to Create and Publish a Report Template

The Reports module in Views allows users to combine a variety of different elements from their Views account into a single document. Users can select items such as Case Studies, Statistic Summaries, Media and Questionnaires to create a multimedia report that can be shared with funders and other stakeholders.

To complete a report, a Report Template first needs to be created. To build and publish a Report Template, follow these steps:

- Hover over **Intelligence** and select **Report Templates**
- Click on the **plus** icon
- Enter a **Name** and **Description** +
- Click **Save**
- The Report Template can then be built by selecting from the following options:

- H1 - A Header which the report creator can define
- H.. - A Header which the report completer can define
- h2 - A Sub-Header which the report creator can define
- h... - A Sub-Header which the report completer can define
- Tt - A short text box
- abcd efgh - A long text box
- - A section containing multiple selection checkboxes
- - A section containing single selection radio buttons

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- - A section containing a case study
- - A section containing media
- - A statistic which the report completer can define
- - A statistic which the report creator can define
- - A statistic summary which the report completer can define
- - A statistic summary which the report creator can define
- QA - A section containing a questionnaire

Each option will add a different kind of section to the report. Sections can be added multiple times if needed. For example, if a report requires three case-studies, the case-study icon can be selected three times

- Once the Report Template has been built, click on the **save** icon
- Click on **View** from the sections on the left-hand side.
- To publish the Report Template, allowing users to begin creating reports, click on the **publish** icon