

Helpful Hints for Report Templates:

Creating and Attaching Templates

Other Tips

- Templates not only allow custom formatting, but also notes, other summary data, and calculations.
- Templates are useful in calculating data across different versions.
- The original data tab (or tabs) can be hidden, so that users only see the template version. From the Format menu, select Sheet, then Hide.
- The tab that you add can be renamed to anything except 'Report' or 'Report Data.'
- If structural changes are made to your report, remember to update the template.
- Pivot tables and embedded images are not supported by the template functionality.

Matrix Report Template Step-By-Step:

- Create the report in Adaptive Planning, and run the report in Excel. HTML reports can be exported to Excel.
- The Excel workbook will have a Report Data tab and a Report Info tab. Data always writes to these two tabs, so don't change them.
- Add a tab (or tabs) by right-clicking on an existing tab, then Insert, then Worksheet. This is where you will make your formatting changes.
- Highlight the entire Report Data worksheet, then copy and paste it into your newly added tab.
- Establish a link between these two tabs. From each data cell in your new tab, reference the original Report Data tab. The reference will look like this, for example: ='Report Data'!B4
- Custom formatting and calculations can now be made on your new tab. Add a logo, a title, bordering, a graph, or set Print Area.
- Save the Excel workbook and return to the main reporting menu in Adaptive Planning.
- Right-click on the report, and select Attach Template. Browse to find the find the Excel workbook you just modified. The template has now been uploaded to the Adaptive Planning server, and the report will run in the template format.
- Creating a template for Repeating Reports is a similar process. For a Repeating Report, add a new tab for each Report Data tab.
- Formatting changes can be made to many tabs at once. Hold "Ctrl" and select several tabs to group them.

This document is intended as a quick reference tool. If you would like additional information about the template creation process, see the [Creating Report Templates training video](#):

<https://adaptiveplanning.webex.com/adaptiveplanning/lsr.php?AT=pb&SP=MC&rID=43683812&rKey=060CADFDBBF6E177>