**Templates Help**

A template is a collection of reports that you give a name to and save in the Template tab.  Using templates makes it easier for you to find and print reports; instead of looking for the reports individually, you can create a template with the reports you want, give it a name, and retrieve them with one or two clicks of the mouse.

***Example:*** If you often work with small business owners, you can create a template that includes reports introducing the concept of business continuation. When the template is created, it can be re-used for another new client or prospect.

Some of the things that you can do with a template include:

* Create a template
* Remove reports from a template
* Delete a template

**Templates Tab**

* The **My Templates** section contains collections of reports that you have previously created and saved in the Presentation tab.

**Opening an Existing Template Help**

You can open an existing template to add the template to your presentation, remove a report from a template, edit the template, or delete the template.

1.  Click the **Template** tab.

2.  Click the title of a folder under **My Templates**

3.  The selected folder lists all the reports in the templates. Click a report title to view it in the Report Display window.

4.  To add a template to the presentation, click on the option box next to the folder with the name of the template.

Related Topics:

Printing a report

Selecting and viewing a report

**Import a Template Help**

This feature allows you to import a previously-saved template from another source to use for your presentation (.ktx document).  For example, you may work with someone who created a template that addresses your needs.  That person can export the template to a location that you have access to, then you can import the template into your program

1. From the **File** menu, select **Import Template**.
2. Browse and then select the preferred template.

**Export a Template Help**

This feature allows you to export a customized template into a .ktx document. For example, you may wish to share a template you created with someone else you work with.

1. From the **File** menu, select **Export Template**.
2. Click the **Save** button.
3. Browse to the destination where the template is to go (you can also change the name of the exported template here), and then click **Save**.

If you have not created any templates, meaning there are no templates in the My Templates folder, this feature will be inactive.

Related Topics:

Export a Report(s)

**Removing a Report from a Template Help**

Complete the following steps to remove a report from one of your templates.

1.  Click the **Templates** tab, and then click the template title (folder) where the report to delete resides.

2.  Select the title of the report you want to delete, and then click the **Remove** (**X**) button.

3.  When prompted to confirm the deletion, click the **Yes** button.

**Deleting a Template Help**

You can delete an existing template if it is no longer needed and want to free some space on the hard disk.

1.  Click the **Templates** tab.

2.  Select the title of the template you want to delete, and then click the **Remove** (**X**) button.

3.  When prompted to confirm the deletion, click the **Yes** button.

You can also edit the template here by using the up/down arrows to move a selected report, or remove a selected report by clicking on the (x).

**Advisys Headquarters Help**

Advisys, Inc.  
16969 Von Karman Avenue, Suite 125  
Irvine, California 92606  
U.S.A.  
Main office: (800) 777-3162

**Advisys Website Help**

Visit the Advisys website at: https://www.advisys.com.

**Fax Form Help**

Fax your technical support questions to us when any of the following circumstances occurs:

* You do not have the time to call us
* Before or after normal customer service hours
* When additional printed material (such as screenshots or error messages) will help the Advisys Customer Service Representatives answer your question more quickly
* To avoid potential delays in speaking with a Customer Service Representative during periods of peak activity

Our fax number is 949-250-0794

**Search Tab Help**

The Search tab allows you to find reports by either category or specific key words.

***Note:*** Use the \* wild card for searches where you can't remember how to spell a word (e.g., insuran\*). If a word is misspelled, the system does not return any results.

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| --- | --- |
| **Option/List/Field** | **Description/Procedure** |
| Select a Topic | From this list, select a specific topic or **All** topics. |
| Enter Keyword(s) | In this field(s), type a keyword(s) and then select any of the following conjunctions from the list:   * **Only** to limit your search to one word. * **And** to find all reports that have both the first and the second word in them (e.g., Education and Funding.) * **Or** to find all reports that have either the first word or the second word in them (e.g., Education or Estate.) |
| Search Titles Only | Click this option to only search the titles of the reports. When this option is cleared, it also searches the text in the reports. |
| Search | After entering all search criteria, click this button to search the system for reports. |

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**Presentation Tab Help**

The Presentation Tab allows you to:

* View the names of reports under the **Your Presentation** folder that have been selected from the Report Selection window.
* Edit the list of reports.
* Set up the presentation's format.
* Customize the presentation for your client.
* Print your presentation.
* Save your list of reports as a template.

**Folders and Buttons**

|  |  |
| --- | --- |
| **Feature** | **Description** |
| Your Presentation | This is the main folder in the Report Selection window that displays all your selected reports. |
| Arrow Up Button | Click this button to move a selected report up in Your Presentation list. |
| Arrow Down Button | Click this button to move a selected report down in Your Presentation list. |
| Delete (x) Button | Click this button remove a selected report from Your Presentation list.  Tip:  To remove all the reports from the presentation at once, highlight the Your Presentation folder by clicking it, then click on the (x) button.  This will clear the presentation. |
| Presentation Options\* | When you are in the Presentation tab, the Presentation Options  window displays in the Report Selection window, and allows you to format and customize a presentation by adding:   * Presentation Contents * Client Information * Title Pages\* |
| Preview Button | Click this button to preview the presentation in the Report Display window. |
| Save As Template Button | Click this button to save the list of reports as a template to use again. |
| Print Button | Click this button to print the presentation. |

Related Topics:

What is a Template?

Printing a Report or Presentation