Unanet University

UNANET CRM:
USING PUBLISHER WITH ADOBE INDESIGN

PARTICIPANT GUIDE

Last Revised August 1, 2023

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ABOUT THIS PARTICIPANT GUIDE

This document serves as a supplement to the training courses offered through Unanet University. Participants should use this workbook to complete exercises in the student Unanet system while attending the course. Additionally, participants should record notes and actions for reference when working within their own Unanet CRM system.

Symbols used in this guide

Activity

Important Note

Demo

Question

Tour

Unanet Contact Information

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Send questions here for information about courses, course schedules, enrollments, certifications, and unanetuniversity.com. This mailbox is monitored daily.

Support Portal

To improve your experience accessing our support resources, all Knowledge Center articles and FAQs have been relocated to the Unanet Support Portal at support.unanet.com. You will need a Support ID to access the portal, which you can acquire using the steps below:

> To obtain a login to the Unanet support portal or to create a new ticket, send an email to support@unanet.com with "Support Portal ID request" in the Subject line.
>
> The following conditions must be met to be granted a support account:
> - The "from" address must match the domain of your company.
> - It must NOT be a generic email account (e.g., it cannot be from gmail.com, aol.com, or msn.com).

The company must have an active support agreement with Unanet.

COURSE INTRODUCTION

In this course, you will review tasks specific to the Publisher 4.0 module and InDesign, such as creating and uploading IDML templates and generating InDesign documents with your CRM data.

Learning Objectives

After this session of **Unanet CRM: Using Publisher 4.0 with Adobe InDesign**, participants will be able to:

- Recall how to navigate Publisher 4.0 in Unanet CRM.
- Explain how to create an InDesign Resume with Unanet CRM data.
- Explain how to create an InDesign Project Profile with Unanet CRM data.
- Explain how to create an InDesign Project List with Unanet CRM data.
- Explain how to create an InDesign Knowledge Document with Unanet CRM data.
- Explain how to create an InDesign Opportunity Document with Unanet CRM data.
- Explain how to create an InDesign Batch Job.

Publisher 4.0 is neither associated nor integrated with MS Publisher.

Student Training Site

A Unanet CRM training system has been specifically created to support this course. The system is configured around a fictional CRM company named Publisher Course Demo Firm. The activities, and accompanying simulations, reference the Demo Firm, its related internal and external organizations, and business processes.

Roles & Access

Unanet is a role-based system that provides security and access based on the roles assigned to the user by the System Administrator. It is helpful to be familiar with Unanet's roles and the access that comes with each unique role. Users may need to be assigned a combination of roles to perform various job functions.

During this course, students may be instructed to log in to Unanet utilizing specific user personas containing the appropriate roles to access and complete the required activities.

Please note that the password is case-sensitive; the username is not.

User ID	Password	Firm ID	Firm Name
admin	Cosential!	2321	Publisher Course Demo Firm

The activities in this course can be easily adapted for use in your Unanet CRM system. When necessary, substitute your information/selections for the information provided in the activities.

Course Assets

Use this link to access the course assets needed to complete the course activities.
Note: You cannot complete the activities as written without these assets.

LESSON 1: INTRODUCTION TO PUBLISHER 4.0

Learning Objectives

Recall how to navigate Publisher 4.0 in Unanet CRM.

- Summarize the features and functions of the Publisher 4.0 tool.
- Recall how to search and filter the grid.

Introduction to Publisher 4.0

Use the Publisher 4.0 module to generate custom Resumes, Project Profiles, Project Lists, Opportunity Profiles, and Knowledge Profiles as Microsoft Word or Adobe InDesign documents. Publisher 4.0 populates your documents with data from Unanet CRM. You create your template, familiarize yourself with where your data lives in the system, insert merge variables, and merge the data with your template.

PREPARE

- Locate data in Unanet CRM
- Compare data in your document to data in your system

BUILD

- Add variables to template in InDesign
- Insert placeholder images and embed images

LIST DATA

- Determine List Data Formatting (if needed)
- Create List Data Format

UPLOAD

- Upload template
- Select format for list variables

CREATE

- Create document
- Generate document filled with data from Unanet CRM

Tour 1.1 – Example Documents

This tour will show examples of documents created using Publisher 4.0.

Overview of the Publisher 4.0 Interface

Use Publisher Manager to create and search documents, access template administration screens, search and filter your document grid, and build batch jobs.

Create Document

You can create the following types of documents:

Document Type Unanet CRM Location	**Example Documents**
Project Profile Project Module	Single or multiple-page project sheet, case study, or cut sheet
Knowledge Profile Knowledge Module	Boiler plate text such as firm overview, history & capabilities, design-build approach, sustainable processes, or proposal tabs
Resume Personnel Module	Single or multiple-page resumes including comprehensive master and tailored resumes
Project List Project Module	Single or multiple-page project lists with or without a thumbnail photo
Opportunity Profile Opportunity Module	Cover letter, proposal cover, or simple letter proposal

Template Administration

You can access the following administration screens:

Template Administration	**Available Admin Features and Functionality**		
	Upload Template	**List Data Formatting**	**Document Data Dictionary**
Project Profile	✓	✓	✓
Knowledge Profile	✓		✓
Resume	✓	✓	✓
Project List	✓	✓	✓
Opportunity Profile	✓	✓	✓

Demo 1.2 – Exploring the Publisher 4.0 Interface

In this demo, you learn about the Publisher 4.0 interface.

Activity Steps

1. Select the **Publisher 4.0** module.
2. Select the **Create Document** dropdown to view the different document types available.
3. Select the **Template Administration** dropdown to view the template admin pages where you build List Data Formatting, access Document Data Dictionaries, and upload templates.
4. Select the **Filters** icon. The filtering options display. You can Apply, Cancel, Save As, and Reset filters.
5. Review the **Search** options. You can search by name, data source, project number, opportunity number, and client/owner.
6. Review the **Export Grid** button.
7. Select the **Refresh** button to view any changes.
8. Select **Doc Created Date > Sort Ascending**.
9. Select **Doc Created Date > Columns**.
10. Verify that the following check boxes are selected:
    - **Offices**
    - **Opportunity Number**
    - **Territories**
11. Select **Doc Created Date > Group by this Field** to group grid by **Doc Created Date**.
12. Select **Doc Created By > Show in Groups** to ungroup documents by **Doc Created Date**.
13. Select the **Doc Created Date** header and drag it before the **Doc Created By** header to reposition columns in the grid.

Filtering

You can filter your Publisher Manager document grid by several data types to display specific documents and save filters for future use.

- All Documents
- All Project Profiles
- All Knowledge Profiles
- All Resumes
- All Project Lists
- All Opportunity Profiles

Activity 1.3 – Filtering

In this activity, you will create a custom filter.

Activity Steps

1. Select the **Publisher 4.0** module.
2. Select the **Filter** icon.
3. Select **filter by Offices > Austin**.
4. Select **filter by Template Type > InDesign**.
5. Select **filter by Practice Areas > Education**.
6. Select the **Apply** button.
7. Select the **Filter** icon.
8. Select the **Save As** button. The **Name** popup opens.
9. Type *Austin Education-InDesign* in the **Please enter a name for this filter set** field.
10. Select the **OK** button.

Check Your Understanding

Determine if each statement is true or false.

	True or False
You can change the position of the columns in the document grid.	
You are unable to save searches in Publisher 4.0.	
You build your template using Publisher 4.0.	
You can add and remove columns from the document grid.	

Refer to Appendix A for answers to the Check Your Understanding questions.

LESSON 2: RESUMES

Learning Objectives

Explain how to create an InDesign Resume with Unanet CRM data.

- Explain how to create a Resume Template.
- Recall how to build a nested paragraph style.
- Explain how to create List Data Formatting.
- Recall how to upload a Resume Template to Unanet CRM.
- Explain how to create and generate a Resume Record for Personnel.

Introduction

Use Unanet CRM’s Publisher 4.0 to create Resumes for Personnel in the Unanet CRM account using designed templates and CRM data. Once created, you can access the Resume from the Publisher Manager documentation grid or the Personnel record under the Documents tab.

PREPARE

- Locate data in Personnel module
- Compare data in your document to data in your system

BUILD

- Add variables to template in InDesign
- Insert placeholder images and embed images

LIST DATA

- Determine List Data Formatting
- Create List Data Format

UPLOAD

- Upload template
- Select format for list variables

CREATE

- Create Resume
- Generate Resume filled with data from Unanet CRM

We recommend marking up a hard copy of your existing Resume with the Unanet CRM field names for each piece of data. This is a helpful reference document when you build your Resume template.

Prepare to Create a Resume Template

Any data you determine is essential to your Resume design must be part of the Personnel records in Unanet CRM. It may be necessary to update these records before you generate a Resume.

Tour 2.1 – Preparing to Create a Resume Template

In this tour, you will learn about preparing to create a Resume template by reviewing corresponding fields in a Personnel record.

Build a Resume Template

Once you have identified which data fields to include in the Resume, use the Document Data Dictionary to find the corresponding variables. Then, copy the variables from the Document Data Dictionary and paste them into the InDesign Resume template. The Resume template must be saved with a file extension of .idml to upload the file to Unanet CRM.

Document Data Dictionary

The Document Data Dictionary contains all the available data fields you can use in your Document templates. You can copy and paste the Field Names from the Document Data Dictionary into the Format Definition field. Each template type has its own corresponding Document Data Dictionary. Using the variables from the right Document Data Dictionary for that template type is essential.

Activity 2.2 – Building a Resume Template

In this activity, you will build a Resume template.

Activity Steps

Part 1: Embed Images in the Template

1. Open the **Standard_Resume.indd** file. **Note:** If necessary, select **Type > Show Hidden Characters**.
2. Select **Advanced** from the **Window > Workspace** menu dropdown, if necessary.
3. Select the **Publisher 4.0** module.
4. Select **Template Administration > Resume**. The **Resume Administration** page opens.
5. Select the **Enable Publisher 4.0 for InDesign** link, if necessary.

6. Select the **Document Data Dictionary** link. The **Resume Data Dictionary** window opens.
7. Return to **InDesign**.
8. Select the **headshot** image.
9. Select **File > Place**. The **Place** window opens.
10. Select the **Headshot_placeholder.png** image.
11. Select the **Open** button.
12. Select the **Fill Frame Proportionally** button in the **Frame Fitting** section.
13. Verify that the **Auto-Fit** check box is selected.
14. Select the **Links** tab.
15. Right-click the **Headshot_placeholder.png** image name in the **Links** tab.
16. Select **Embed Link** from the menu.

Part 2: Replace Field Names

1. Return to the **Resume Data Dictionary** window.
2. Press **Ctrl+F**.
3. Type *formal* in the **Search** field.
4. Select **%ResumeFormalName%** for **Personnel Formal Name**.
5. Press **Ctrl+C**.
6. Return to **InDesign**.
7. Select the **Alex Hoffman, LEED AP, NCARB** text to the paragraph marker.
8. Press **Ctrl+V**.
9. Repeat steps **1-8** to replace data with **Field Name** variables.

Search	Field Name	Template
Title	%ResumeTitle%	Project Manager
Intro	%ResumeIntro%	Introduction Text
Experience	%ResumeListProjectExperience%	Project Experience Text
Years	%ResumeYearsInIndustry%	20 years
Years	%ResumeYearsWithFirm%	18 years
Education	%ResumeListEducation%	Education Text
Registration	%ResumeListRegistrations%	Architect, No. C2100, CA
Registration	%ResumeListOtherRegistrations%	LEED AP

10. Delete remaining listings for **Relevant Experience**.
11. Close the **Resume Data Dictionary** window.

Part 3: Save the Resume Template

1. Select **File > Save As**. The **Save As** window opens.
2. Type *Standard_Headshot_XX* in the **File name** field. **Note:** Replace **XX** with your initials.
3. Select **InDesign 2022 document** from the **Save as type** dropdown.
4. Select the **Save** button.

5. Select **File > Save As**. The **Save As** window opens.
6. Type *Standard_Headshot_XX* in the **File name** field if not prepopulated.
7. Select **InDesign CS4 or later (IDML)** from the **Save as type** dropdown.
8. Select the **Save** button.
9. Close the **Standard_Headshot_XX.indd** document.

InDesign Nested Paragraph Style

Nested styles are especially useful for formatting lists in templates. For example, you can specify character-level formatting for one or more ranges of text within a paragraph or line as shown in the example below.

PARRAMATTA PARK OFFICE BUILDING | Hurd Real Estate Group
Senior Project Manager. Hurd Real Estate Group moving into new offices in downtown Denver. The announcement from Parramatta Park details the real estate giant's commitment to take over 150,000 square feet of office space in the luxury mixed use development.

You can define a character that ends the style for each nested style, such as a tab character or the end of a word. You can set up two or more nested styles to work together, one taking over where the previous one ends. Since project experience lists are comprised of paragraphs with repetitive formatting for each project on the list, when generated, Publisher will loop back to the first style in the sequence.

Activity 2.3 – Creating a Nested Paragraph Style

In this activity, you will create a nested paragraph style.

Activity Steps

Part 1: Add a New Paragraph Style

1. Open the **Create_A_Nested_Paragraph_Style.indd** file. **Note:** If necessary, select **Type > Show Hidden Characters**.
   If you still do not see hidden characters, use the selection tool, and click anywhere on the pasteboard. Then, type a W to change the Screen Mode from Preview to Normal.
2. Select **Window > Styles > Paragraph Styles**.
3. Select the **hamburger** menu in the top-right corner of the **Paragraph Styles** panel.
4. Select **New Paragraph Style** from the dropdown. The **Paragraph Style Options** window opens.
5. Type *Resume_Nested_Project_Experience* in the **Style Name** field.

6. Select the **OK** button.
7. Select the **text** (all project experience) in the **Relevant Experience** section.
8. Select **Resume_Nested_Project_Experience** from the **Paragraph Styles** panel.
9. Click the page to deselect the text. **Note:** The style **Resume_Nested_Project_Experience** is applied to the text, and you can see the changes as you build the nested paragraph.

Part 2: Build Nested Paragraph Style with Preview

1. Right-click **Resume_Nested_Project_Experience** in the **Paragraph Styles** panel.
2. Select **Edit "Resume_Nested_Project_Experience"** from the dropdown. The **Paragraph Style Options** window opens.
3. Select the **Preview** checkbox.
4. Move the **Paragraph Style Options** window so that you can view the text **Relevant Experience** section, if necessary.
5. Select **[Basic Paragraph]** from the **Based On** dropdown**.**
6. Select **Basic Character Formats** from the left menu.
7. Adjust **Leading** to **12 pt**.
8. Select **Indents and Spacing** from the left menu.
9. Select **0.0625 in** in the **Space Before** field.
10. Select **0.0625 in** in the **Space After** field.
11. Select **Drop Caps and Nested Styles** from the left menu.
12. Select the **New Nested Style** button.
13. Use the information in the table to define the nested style:

Nested Styles			
Resume_ProjectName-Blue	**up to**	**1**	**|**

14. Select the **New Nested Style** button.
15. Use the information in the table to define the nested style:

Nested Styles			
Experience Client	**through**	**1**	**Forced Line Break**

16. Select the **New Nested Style** button.
17. Use the information in the table to define the nested style:

Nested Styles			
Bold	**up to**	**1**	**.**

18. Select the **OK** button.
19. Select **File > Save As**. The **Save As** window opens.
20. Type *Create_A_Nested_Paragraph_Style_XX* in the **File name** field.
21. Select the **Save** button.
22. Close the **Create_A_Nested_Paragraph_Style_XX.indd** document.

List Data Formatting

List Data Formatting allows you to format and arrange variables included in a list of information, such as project experience, on a Resume. Use Lists for all groups of data to include in the template. The following groups of data within Unanet CRM require a List Data Format for a Resume:

- Project Experience
- Awards
- Education
- Registrations
- Previous Project Experience
- Other Registrations
- Training
- Skills
- Memberships
- Presentations
- Publications
- Project Publications
- Personnel Awards
- References

Activity 2.4 – Creating List Data Formatting

In this activity, you will create list data formatting for your Resume.

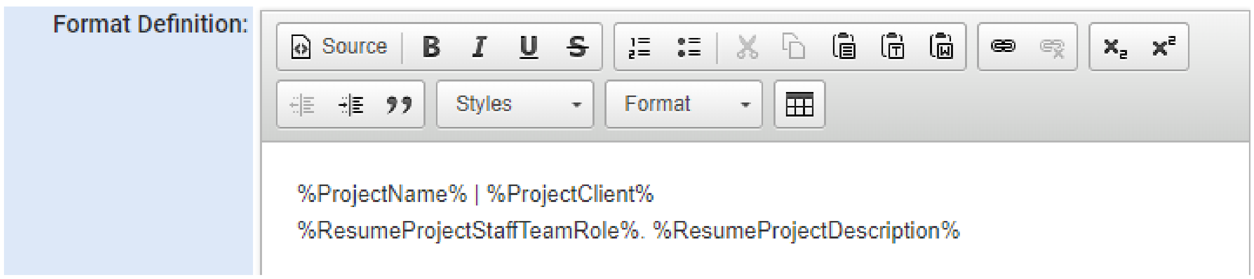
Activity Steps

Part 1: Create a List Data Format for Project Experience

1. Select the **Publisher 4.0** module.
2. Select **Template Administration > Resume**. The **Resume Administration** page opens.
3. Select the **List Data Formatting** link.
4. Select the **Create Format** link in the **List Data Formatting – Project Experience** section. The **Project Experience List Format** window opens. The **Format Definition** field is prepopulated with common variables.
5. Type *Standard_InDesign_XX* in the **Format Name** field.
6. Select the **Source** button to view the definition in the source code view.
7. Type *
* after **%ProjectClient%** in the **Format Definition** field.
8. Select the **Source** button to return to the default view. The text displays as two lines.
9. Replace the **,** (comma) after **%ProjectName%** with a **|**.
10. Remove the **–** after **%ProjectClient%**.

11. Select the **Document Data Dictionary** link. The **Resume Data Dictionary** window opens. These are the available merge field names.
12. Press **Ctrl+F**.
13. Type *role* in the **Search** field.
14. Select **%ResumeProjectStaffTeamRole%** for **Project Personnel Staff Team Role**.
15. Press **Ctrl+C**.
16. Return to the **Project Experience List Format** window.
17. Place your **cursor** at the beginning of the second line in the **Format Definition** field.
18. Press **Ctrl+V**.
19. Type . at the end of the pasted variable.
20. Select **Personnel** in **%ResumePersonnelProjectDescription%**.
21. Press **Delete**.

    Your definition should look like this:

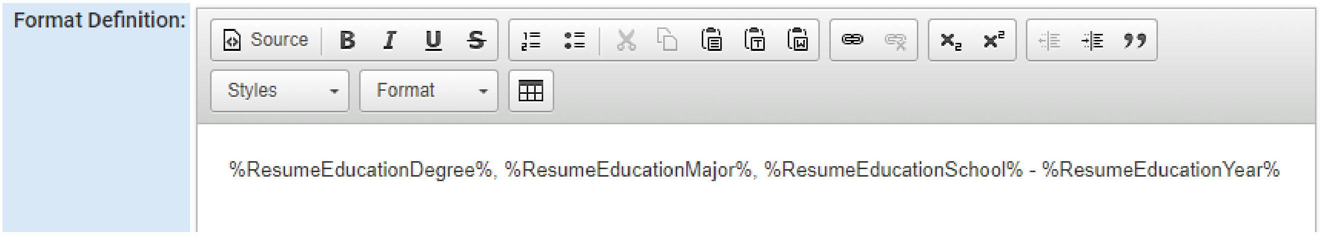


22. Select the **Save** button.
23. Close the **Resume Data Dictionary** window.

Part 2: Create a List Data Format for Education

1. Select the **Create Format** link in the **List Data Formatting – Education** section. The **Education List Format** window opens.
2. Type *Standard_InDesignWYear_XX* in the **Format Name** field.
3. Select the **Document Data Dictionary** link. The **Resume Data Dictionary** window opens.
4. Select **%ResumeEducationMajor%** for **Education Major**.
5. Press **Ctrl+C**.
6. Return to the **Education List Format** window.
7. Place your **cursor** at the end of the first variable in the **Format Definition** field.
8. Press **Ctrl+V**.
9. Type a , (comma) at the end of the pasted variable.
10. Select the **Source** button to view the definition in the source code view.
11. Select the **Source** button to return to the default view.
12. Type *Degree Major School Year* in the **Description** field.

Your definition should look like this:

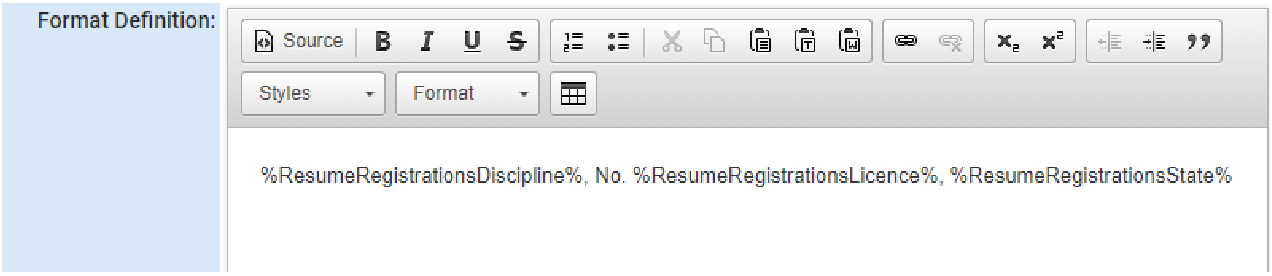


13. Select the **Save** button.
14. Close the **Resume Data Dictionary** window.

Part 3: Create a List Data Format for Registration

1. Select the **Create Format** link in the **List Data Formatting – Registrations** section. The **Registrations List Format** window opens.
2. Type *Standard_InDesign_XX* in the **Format Name** field.
3. Select **%ResumeRegistrationDescription%** in the **Format Definition** field.
4. Press **Delete**.
5. Select the **Document Data Dictionary** link. The **Resume Data Dictionary** window opens.
6. Press **Ctrl+F**.
7. Type *discipline* in the **Search** field.
8. Select **%ResumeRegistrationsDiscipline%** for **RegistrationDiscipline**.
9. Press **Ctrl+C**.
10. Return to the **Registrations List Format** window.
11. Place your **cursor** at the beginning of the definition.
12. Press **Ctrl+V**.
13. Type *, No.* after **%ResumeRegistrationsDiscipline%**.
14. Return to the **Resume Data Dictionary** window.
15. Select **%ResumeRegistrationsLicence%** for **Registration License Number**. **Note:** The word License is misspelled in the system. You need to have the misspelled variable included in your template.
16. Press **Ctrl+C**.
17. Return to the **Registrations List Format** window.
18. Select **%ResumeRegistrationLicense%**.
19. Press **Ctrl+V**.
20. Type , after **%ResumeRegistrationsLicence%**.
21. Return to the **Resume Data Dictionary** window.
22. Select **%ResumeRegistrationsState%** for **Registration State**.
23. Press **Ctrl+C**.
24. Return to the **Registrations List Format** window.
25. Place your **cursor** in the **Format Definition** field at the end of **%ResumeRegistrationsLicence%,**.
26. Press **Ctrl+V**.

27. Select **%ResumeListYearFirstReg% -**.
28. Press **Delete**.
    Your definition should look like this:



29. Select the **Save** button.
30. Close the **Resume Data Dictionary** window.

Part 4: Create a List Data Format for Other Registrations

1. Select the **Create Format** link in the **List Data Formatting – Other Registrations** section. The **Other Registrations List Format** window opens.
2. Type *Standard_InDesign_XX* in the **Format Name** field.
3. Select **- %ResumeListOtherDiscipline% (%ResumeListOtherRegistrationsOrganizations%) %ResumeListOtherYearFirstReg%** in the **Format Definition** field.
4. Press **Delete**.
5. Select the **Save** button.

Upload a Resume Template

Now that you have created your Resume template, including embedded images, placed variables, formatted any lists, and saved it as an .idml; you are ready to upload your template to Publisher 4.0.

You can upload and store unlimited Resume templates on the Template Administration > Resume page.

Note: If you need to update an existing template, download it, adjust it, then save it over the existing system template. Saving over the existing template automatically updates any Resume using that template.

Activity 2.5 – Uploading a Resume Template

In this activity, you will upload a Resume template from InDesign to Publisher 4.0.

Activity Steps

1. Select the **Publisher Manager** link.
2. Select **Template Administration > Resume**. The **Resume Administration** page opens.
3. Select the **+Upload Template** link. The **Upload Resume Layout Template** window opens.
4. Type *StandardWImage_XX* in the **Template Name** field.
5. Select the **Choose File** button. The **Open** window opens.
6. Select the **Standard_Headshot_XX.idml** file.
7. Select the **Open** button. **Note:** You can also associate the Resume template with a particular office, practice area, or territory. This allows users to filter the choices when selecting a template.
8. Select the **Save** button. The **Template** is added to **Publisher 4.0**.
9. Select the **Select** link for **List - Education**. The **Select a Format for Education** window opens.
10. Select the **Standard_InDesignWYear_XX** radio button.
11. Select the **Save** button.
12. Repeat steps **11-13** to select a format for the remaining list variables.

List Variable	**Format**
List - Other Registrations	Standard_InDesign_XX
List - Project Experience	Standard_InDesign_XX
List - Registrations	Standard_InDesign_XX

Users can now use this template to create a Resume.

Create a Resume Record for Personnel

Use Publisher 4.0 to generate and store Resumes populated with your Project and Personnel data.

Project List or Project Report

You can choose which projects are added to a Resume with the Project List or Project Report options.

Project List

- It allows you to search the staff members project experience.
- This list is static and will not change unless additional projects are selected.

Project Report

- It allows you to include a group of projects based on a Project report.
- This list is dynamic and may change if new projects are added to the staff member's project experience which meet the criteria of the report you created.

Activity 2.6 – Creating a Resume

In this activity, you will create and generate a Resume using the Resume template you created.

Activity Steps

Part 1: Create a New Resume

1. Select the **Publisher Manager** link.
2. Select **Create Document > Resume**.
3. Type *AlexHoffman_OfficeDataCenter_Headshot_XX* in the **Resume Name** field.
4. Type *Alex* in the **Personnel** field.
5. Select **Alex Hoffman** from the list of returned results for **Personnel**.
6. Select the **Save** button.

Part 2: Select the Layout

1. Select the **Select** link in the **Selected Layout (Body of your Document)** section. The **Select a Layout** window opens.
2. Select the **StandardWImage_XX** radio button.
3. Select the **Save** button. A warning message displays.
4. Select the **OK** button.

Part 3: Add Projects to the Resume Using Project Reports

1. Select the **Project Reports** radio button in the **Project Experience Generation** section.
2. Select the **Save** button.
3. Select **Commercial - Office/Data last 5 years-Design-Build** from the **Select Project Report** dropdown.
4. Select the **Save** button.
5. Select the **Dynamic** radio button for **Generate Project List**.
6. Select the **Save** button. **Note:** The report sort determines project order. You can delete records.

Part 4: Add Projects to the Resume Using Project List Criteria

1. Select the **Project List Criteria** radio button in the **Project Experience Generation** section.
2. Select the **Save** button.
3. Select the **Project Experience** link. The **Project Advanced Search** window opens.
4. Select the **All Projects** check box.
5. Select **Data Center** for **Primary Categories**.
6. Press **Ctrl**.
7. Select **Office** for **Primary Categories**.
8. Select **Design-Build** for **Delivery Method**.
9. Select the **Search** button. The **Project records found** window opens.
10. Select the **All** check box.
11. Select the **Save** button.
12. Select **Parramatta Park Office Building** and drag to the **first line** in the **Selected Experience** table. **Note:** You can delete and reorder the records.

Part 5: Add Education

1. Select the **+Education** link. The **Select your Education items to display** window opens.
2. Select the **Texas A&M University 2002 BS Construction Science** check box.
3. Select the **Texas A&M University 2004 MS Civil Engineering** check box.
4. Select the **Save** button.

Part 6: Add Registration

1. Select the **+State Registration** link. The **Select your Registration items to display** window opens.
2. Select the **C20100 License Number** check box.
3. Select the **Save** button.

Part 7: Add Other Registrations

1. Select the **+Other Registrations** link. The **Select your Other Registration items to display** window opens.
2. Select the **LEED AP** check box.
3. Select the **Save** button.

Part 8: Select Introduction, if necessary

1. Select the **Select** link for the **Introduction**. The **Select a Resume Introduction** window opens.
2. Select the **Select** link for the **Standard Resume**.

Part 9: Generate a Resume

1. Select the **Generate Document** button.
2. Select the **idml** link to download the **Resume**.
3. Select **Open** on the **Download** bar. The **Resume** opens in **InDesign**.

Best Practices for Resumes

Placeholder Images

Use images which are completely unrelated to your business. Make the placeholder image the same size as you would like your Unanet CRM image, set to **Fit Content Proportionally,** and select the **Auto-fit** check box.

Embed Images

Embed all images you would like Unanet CRM to replace. Do not link the images as the links will be broken once uploaded to Unanet CRM.

Logo/Graphics

Place all logos or other graphics which you do not want Unanet CRM to replace on your Master page and embed them.

Resume Naming Conventions

Include the Personnel name, the template name, whether it is focused or a master, and Word or InDesign, when naming a resume record. For example, *ArchitectAdam_InDesignStandardMaster*.

Project Reports

Create a Project Report for each of your staff requiring a resume, if creating Dynamic resumes. The fields of data displayed in the report do not matter; however, the Sort option selected in the Report will follow to the generated document.

Resume Project Report Naming Conventions

Name all the resume reports similar to make searching for the reports easier when creating a resume. For example, *ArchitectAdam_AllProjects*.

Exclude from Publisher

Select **Exclude from Publisher** within each Personnel record for Project Experience association. This will allow you to filter out Project records that your staff do not want on their resumes.

Styles

Use both Paragraph and Character Styles for text in InDesign. Use Nested Styles to automatically apply Character Styles within a Paragraph. Set up List Data formatting using forced line breaks or dashes that match how you built your nested style.

Check Your Understanding

Which one of the following options do you use for viewing the available variables?

a) Document Data Dictionary
b) Template Administration
c) List Data Formatting

Which one of the following options allows you to format and arrange variables included in a list of information?

a) Document Data Dictionary
b) Template Administration
c) List Data Formatting

Refer to Appendix A for answers to the Check Your Understanding questions.

LESSON 3: PROJECT PROFILES

Learning Objectives

Explain how to create an InDesign Project Profile with Unanet CRM data.

- Explain how to create a Project Profile Template.
- Recall how to upload a Project Profile Template to Unanet CRM.
- Explain how to create and generate a Project Profile Record in Publisher 4.0.

Introduction

Use Unanet CRM's Publisher 4.0 to create Project Profiles for Projects in the Unanet CRM account using designed templates and CRM data. Once created, you can access the Project Profile from the Publisher Manager documentation grid or the Project record under the Documents tab.

We recommend marking up a hard copy of your existing document with the Unanet CRM field names for each piece of data. This is a helpful reference document when you build your Project Profile template.

Prepare to Create a Project Profile Template

Identify the data fields you want to display in your document. Any data you determine is essential to your design must be part of the Project records in Unanet CRM. You may need to update these records before generating a Project Profile.

Tour 3.1 – Preparing to Create a Project Profile Template

In this tour, you will learn about preparing to create a Project Profile template by reviewing corresponding fields in a Personnel record.

Build a Project Profile Template

Once you have identified which data fields to include in the Project Profile, use the Document Data Dictionary to find the corresponding variables. Then, copy the variables from the Document Data Dictionary and paste them into your InDesign Project Profile template. You also create a format for any "list" data you have included in your template. The Project Profile template must be saved with a file extension of .idml to upload the file to Unanet CRM.

Activity 3.2 – Building a Project Profile Template

In this activity, you will build a Project Profile template.

Activity Steps

Part 1: Embed Images in the Template

1. Open the **Standard_ProjectProfile.indd** file. **Note:** Select **Type > Show Hidden Characters** to show the paragraph marks.
2. Select the **Publisher 4.0** module.
3. Select **Template Administration > Project Profile**. The **Project Profile Administration** page opens.
4. Select the **Document Data Dictionary** link. The **Project Profile Data Dictionary** window opens.
5. Return to **InDesign**. **Note:** The **Parent Page** is named **PP-ProjectProfile**.
6. Select the **top** image.
7. Select **File > Place**. The **Place** window opens.
8. Select an **image**.
9. Select the **Open** button.
10. Select **Placeholder_Image 3**.
11. Select the **Fill Frame Proportionally** button.

12. Verify that the **Auto-Fit** check box is selected.
13. Select the **Links** tab.
14. Right-click the **placeholder** image name in the **Links** tab.
15. Select **Embed Link** from the menu.
16. Repeat steps **6-15** for the **other two** images. Be sure to select a different placeholder image for each image.

Part 2: Embed Logo in the Template, If Not Already Done

1. Select the **Pages** tab from the menu.
2. Double-click the **Parent** page.
3. Select the **Unanet** logo.
4. Select the **Links** tab.
5. Right-click the **placeholder** image name.
6. Select **Embed Link** from the menu.
7. Select the **Pages** tab.
8. Double-click the **project page** in the **Pages** panel.

Part 3: Replace Field Names

1. Return to the **Project Profile Data Dictionary** window.
2. Press **Ctrl+F**.
3. Type *projectdisplay* in the **Search** field.
4. Select **%ProjectDisplayName%** for **Published Project Name**.
5. Press **Ctrl+C**.
6. Return to **InDesign**.
7. Select the **Best Stadium** text to the paragraph marker.
8. Press **Ctrl+V**.
9. Select the **Paragraph Styles** tab to check the style. **Note:** Be sure to clear any overrides, if necessary.
10. Repeat steps **1-9** to replace data with **Field Name** variables.

Search	Field Name	Template
Location	%ProjectLocationFullStateName%	Seattle, Washington
Description	%ProjectDescription%	Description
Certification	%ProjectListCertifications%	LEED Platinum
Listref	%ProjectListReferences%	Quotation
Client	%ProjectClient%	Green Mountain, Inc.
Client	%ProjectClientContactName%	Alexander Hamilton
Client	%ProjectClientContactPhone%	(410) 555-1212
Client	%ProjectClientContactEmail%	alex@greenmountain.com
Architect	%ProjectConsultantArchitect%	Architecture Advantage
Architect	%ProjectConsultantArchitectContact%	Raymond Blesener
Architect	%ProjectConsultantArchitectContactPhone%	(218) 724-5568

Architect	%ProjectConsultantArchitectContactEmail%	raymond@architectureadv.com
Final	%FinalContractPublishedCost%	$350,000,000
Calculated	%CalculatedStartMY%	August 2020
Calculated	%CalculatedCompletionMY%	August 2022
Size	%ProjectSize%	100,000
Size	%ProjectSizeUnits%	SF
Delivery	%ProjectDeliveryMethod%	Design-Build

11. Close the **Project Profile Data Dictionary** window.

Part 4: Save the Project Profile Template

1. Select **File > Save As**. The **Save As** window opens.
2. Type *PP_3ImagesClientQuote_XX* in the **File name** field. **Note:** Replace **XX** with your initials.
3. Select **InDesign 2022 document** from the **Save as type** dropdown.
4. Select the **Save** button.
5. Select **File > Save As**. The **Save As** window opens.
6. Type *PP_3ImagesClientQuote_XX* in the **File name** field if not prepopulated.
7. Select **InDesign CS4 or later (IDML)** from the **Save as type** dropdown.
8. Select the **Save** button.
9. Close the **PP_3ImagesClientQuote_XX.indd** document.

Upload a Project Profile Template

Now that you created your Project Profile template, including embedded images, placed variables, and saved it as an .idml, you can upload your template to Publisher 4.0.

You can upload and store unlimited Project Profile templates on the Template Administration > Project Profile page.

Note: If you need to update an existing template, download it, adjust it, then save over the existing template. Saving over the existing template automatically updates any document using this template.

List Data Formatting

List Data Formatting allows you to format and arrange variables in a list of information on a Project Profile, such as project awards. Use Lists for all groups of data to include in the template. The following groups of data within Unanet CRM require a List Data Format for a Project Profile:

- Project Awards
- Project References
- Project Certifications

Activity 3.3 – Uploading a Project Profile Template

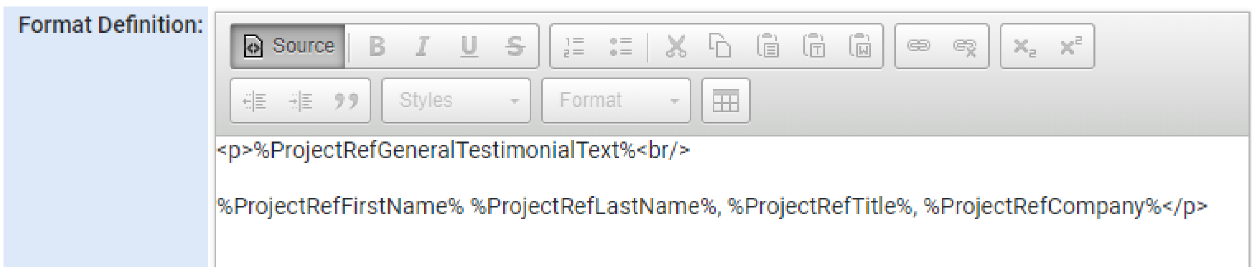
In this activity, you will create your list data formatting and upload a Project Profile template from InDesign to Publisher.

Activity Steps

Part 1: Create List Data Formatting for Project References

1. Select the **Publisher Manager** link.
2. Select **Template Administration > Project Profile**. The **Project Profile Administration** page opens.
3. Select the **List Data Formatting** link.
4. Select the **Create Format** link in the **List Data Formatting – Project References** section. The **Project References List Format** window opens. The **Format Definition** field is prepopulated with common variables.
5. Type *Standard_InDesign_XX* in the **Format Name** field.
6. Select the **Document Data Dictionary** link. The **Project References Data Dictionary** window opens. These are the available merge field names.
7. Press **Ctrl+F**.
8. Type *test* in the **Search** field.
9. Select **%ProjectRefGeneralTestimonialText%** for **General**.

10. Press **Ctrl+C**.
11. Return to the **Project References List Format** window.
12. Place your **cursor** at the beginning of the **Format Definition** field.
13. Press **Ctrl+V**.
14. Select the **Source** button.
15. Replace the **</p>** at the end of the first line **<p>%ProjectRefGeneralTestimonialText%** with **
**.
16. Select **<p>** at the beginning of **%ProjectRefFirstName%**.
17. Press **Delete**.
    Your definition should look like this:

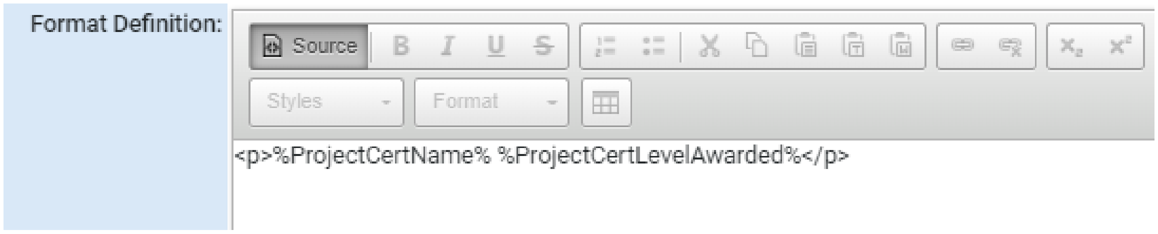


18. Select the **Save** button.
19. Close the **Project Profile Data Dictionary** window.

Part 2: Create List Data Formatting for Project Certifications

1. Select the **Create Format** link in the **List Data Formatting – List Project Certifications** section. The **Project Certifications List Format** window opens. The **Format Definition** field is prepopulated with common variables.
2. Type *Standard_InDesign_XX* in the **Format Name** field.
3. Select the **Document Data Dictionary** link. The **Project Profile Data Dictionary** window opens. These are the available merge field names.
4. Press **Ctrl+F**.
5. Type *level* in the **Search** field.
6. Select **%ProjectCertLevelAwarded%** for **Level Awarded**.
7. Press **Ctrl+C**.
8. Return to the **Project Certifications List Format** window.
9. Select **%ProjectCertDateCertifiedMY%**.
10. Press **Ctrl+V** to paste **%ProjectCertLevelAwarded%** in place of **%ProjectCertDateCertifiedMY%**,
11. Delete the **,** after **%ProjectCertName%**. **Note:** Be sure to include a space between the two variables.
12. Select the **Source** button.

Your definition should look like this:



13. Select the **Save** button.
14. Close the **Project Profile Data Dictionary** window.

Part 3: Upload the Project Profile Template

1. Select the **Document Templates** link.
2. Select the **+Upload Template** link. The **Upload Project Profile Layout Template** window opens.
3. Type *Standard_W3Images_XX* in the **Template Name** field.
4. Select the **Choose File** button. The **Open** window opens.
5. Select the **PP_3ImagesClientQuote_XX.idml** file.
6. Select the **Open** button. **Note:** You can also associate the Project Profile template with a particular office, practice area, or territory. This allows users to filter the choices when selecting a template.
7. Type *This template features 3 images and a client quote.* in the **Instructions** field.
8. Select the **Save** button. The **Template** is added to **Publisher 4.0**.
9. Select the **Select** link for **List – Project Certifications**. The **Select a Format for List – Project Certifications** window opens.
10. Select the **Standard_InDesign_XX** radio button.
11. Select the **Save** button.
12. Select the **Select** link for **List – Project References**. The **Select a Format for List – Project References** window opens.
13. Select the **Standard_InDesign_XX** radio button.
14. Select the **Save** button.

    Users can now use the template to create a Project Profile.

Create a Project Profile Record in Publisher 4.0

Use Publisher 4.0 to generate and store Project Profiles populated with your Project data.

Once you create the record, users can access the record from the Publisher 4.0 documentation grid or the Project record under the Documents tab.

Activity 3.4 – Creating a Project Profile

In this activity, you will create and generate a Project Profile using your created Project Profile template.

Activity Steps

Part 1: Create a New Project Profile

1. Select the **Publisher Manager** link.
2. Select **Create Document > Project Profile**.
3. Type *StadiumOfficeComplex_3Images1Quote_XX* in the **Project Profile Name** field.
4. Type *(2022-0818) Stadium* in the **Project** field.
5. Select the **Save** button.

Part 2: Select the Layout

1. Select the **Select** link in the **Selected Layout (Body of your Document)** section. The **Select a Layout** window opens.
2. Select the **Standard_W3Images_XX** radio button.
3. Select the **Save** button. A warning message displays.
4. Select the **OK** button.

Part 3: Select Images

1. Select the **Select** link for image **1**.
2. Select the **BigStadium_a.jpg** radio button.
3. Select the **Save** button.
4. Repeat steps **1-3** to select images for the **Project Profile**.

Image Number	Image Name
2	Site.jpg
3	Ext rendering.jpg

Part 4: Add Project References

1. Select the **Select Project References** link in the **Selected Project References** section. The **Select your Project Reference items to display** window opens.
2. Select the **Alexander Hamilton** check box.
3. Select the **Save** button.

Part 5: Add Project Certifications

1. Select the **Select Project Certifications** link in the **Selected Project Certifications** section. The **Select your Project Certification items to display** window opens.
2. Select the **USGBC** check box.
3. Select the **Save** button.

Part 6: Add Project Description

1. Select the **Select** link in the **Selected Description** section. The **Select a Description** window opens.
2. Select the **Select** link for **Description Type: Proposal - Standard**.

Part 7: Generate the Project Profile

1. Select the **Generate Document** button.
2. Select the **idml** link to download the **Project Profile**.
3. Select **Open** on the **Download** bar. The **Project Profile** opens in **InDesign**.

Best Practices for Project Profiles

Placeholder Images

Use images which are completely unrelated to your business. Make the placeholder image the same size as you would like your Unanet CRM image, set to **Fit Content Proportionally,** and select the **Auto-fit** check box.

Embed Images

Embed all images you would like Unanet CRM to replace. Do not link the images as the links will be broken once uploaded to Unanet CRM.

Logo/Graphics

Place all logos or other graphics which you do not want Unanet CRM to replace on your Master page and embed them.

Project Profile Naming Conventions

Include the Project name, the template name, and whether it is Word or InDesign, when naming a project profile record.
For example, *BigProject_InDesign_Standard2Images*.

Styles

Use both Paragraph and Character Styles for text in InDesign. Use Nested Styles to automatically apply Character Styles within a Paragraph.

Check Your Understanding

Where do you embed your firm logo so that Publisher 4.0 does not replace it with a record image?

a) Project record in Publisher 4.0
b) Parent page in InDesign
c) You cannot embed a logo

Which one of the following options is necessary if you have more than one image in a template?

a) Use a different placeholder image for each image
b) Save the images to the Parent page of the template
c) Each template can only have one image

Refer to Appendix A for answers to the Check Your Understanding questions.

LESSON 4: PROJECT LISTS

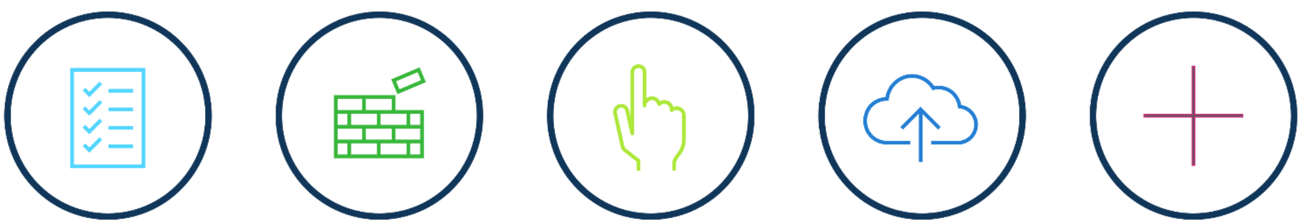
Learning Objectives

Explain how to create an InDesign Project List with Unanet CRM data.

- Explain how to create a Project List template.
- Recall how to upload a Project List template to Unanet CRM.
- Explain how to create and generate a Project List from Publisher 4.0 populated with CRM data.

Introduction

Use Unanet CRM's Publisher 4.0 to create Project Lists for Projects in the Unanet CRM account using designed templates and CRM data.



PREPARE
- Locate data in Project module
- Compare data in your document to data in your system

BUILD
- Add variables to template in InDesign
- Insert placeholder images and embed images

LIST DATA
- Determine List Data Formatting
- Create List Data Format

UPLOAD
- Upload template
- Select format for list variables

CREATE
- Create Project List
- Generate Project List filled with data from Unanet CRM

We recommend marking up a hard copy of your existing document with the Unanet CRM field names for each piece of data. This is a helpful reference document when you build your Project List template.

Note: You must know how to build a table in InDesign to create a Project List .idml template. There are many helpful tutorials online. You should also know how to style your table and set row heights.

Note: If you would like the template to auto-add additional pages when text overflows, set your primary text frame and place your table in the primary text frame set to auto-add pages.

Prepare to Create a Project List Template

Any data you determine is essential to your design must be part of the Project records in Unanet CRM. You may need to update these records before generating a project list.

Tour 4.1 – Preparing to Create a Project List Template

In this tour, you will learn about preparing to create a Project List template by reviewing corresponding fields in a Project record.

Build a Project List Template

Once you have identified which data fields to include in the Project List, use the Document Data Dictionary to find the corresponding variables. Then, copy the variables from the Document Data Dictionary and paste them into your InDesign Project List template. The Project List template must be saved with a file extension of .idml to upload the file to Unanet CRM.

Activity 4.2 – Building a Project List Template

In this activity, you will convert an existing project list into a Project List template.

Activity Steps

Part 1: Embed an Image in the Template

1. Open the **Standard_ProjectList.indd** file.
2. Select **Type > Show Hidden Characters** to show the paragraph marks and table edges.
3. Select the **first thumbnail** image.
4. Select **File > Place**. The **Place** window opens.
5. Select an **image**.
6. Select the **Open** button.
7. Select the **placeholder image**.
8. Select the **Links** tab.
9. Right-click the **placeholder image** name.
10. Select **Embed Link** from the menu.

Part 2: Replace Field Names

1. Select the **Publisher 4.0** module.
2. Select **Template Administration > Project List**. The **Project List Administration** page opens.
3. Select the **Document Data Dictionary** link. The **Project List Data Dictionary** window opens.
4. Press **Ctrl+F**.
5. Type *published* in the **Search** field.
6. Select **%CalculatedProjectNamePublished%** for **Project Name Calc. Published**.
7. Press **Ctrl+C**.
8. Return to **InDesign**.
9. Select the **Hubbard Broadcasting – Commercial Complex** text to the paragraph marker.
10. Press **Ctrl+V**.
11. Select the **Paragraph Styles** button to check the style.
12. Repeat steps 5-10 to replace data with Field Name variables.

Search	Field Name	Template
Location	%ProjectLocationAbbrStateName%	Phoenix, AZ
Final	%FinalContractPublishedCost%	$50,000,000
Calculated	%CalculatedCompletionMY%	August 2022
Certification	%ProjectListCertifications%	LEED Silver
Project Client	%ProjectClient%	Hubbard Broadcasting
Client	%ProjectClientContactName%	Frank Sarno
Phone	%ProjectClientContactPhone%	(952) 500-7921
Email	%ProjectClientContactEmail%	Frank.sarno.ap@gmail.com
Architect	%ProjectConsultantArchitect%	Abcam Advantage
Architect	%ProjectConsultantArchitectContact%	Frank Sarno
Architect	%ProjectConsultantArchitectContactPhone%	(952) 500-7921
Architect	%ProjectConsultantArchitectContactEmail%	Frank.sarno.ap@gmail.com

Note: You may need to widen the column to allow overflow text.

13. Select the remaining lines in the template.
14. Right-click the selected lines.
15. Select **Delete > Row**.
16. Close the **Project List Data Dictionary** window.

Part 3: Embed the Logo, If Not Already Done

1. Select the **Pages** tab from the menu.
2. Double-click the **Parent** page.
3. Select the **Unanet** logo.
4. Select the **Links** tab.

5. Right-click the **placeholder** image name.
6. Select **Embed Link** from the menu.
7. Select the **Pages** tab.
8. Double-click the **project page** in the **Pages** panel.

Part 4: Save the Project List Template

1. Select **File > Save As**. The **Save As** window opens.
2. Type *Standard_ProjectList_XX* in the **File name** field. **Note:** Replace **XX** with your initials.
3. Select **InDesign 2022 document** from the **Save as type** dropdown.
4. Select the **Save** button.
5. Select **File > Save As**. The **Save As** window opens.
6. Type *Standard_ProjectList_XX* in the **File name** field if not prepopulated.
7. Select **InDesign CS4 or later (IDML)** from the **Save as type** dropdown.
8. Select the **Save** button.
9. Close the **Standard_ProjectList_XX.indd** document.

Upload a Project List Template

Now that you have created your Project List template, including the table, embedded thumbnail image, placed variables, and saved it as an .idml, you can upload your template to Publisher.

You can upload and store unlimited Project List templates on the Template Administration > Project List page.

Note: If you need to update an existing template, download it, adjust it, then save it over the existing system template. Saving over the existing template automatically updates any Project List using this template.

List Data Formatting

List Data Formatting allows you to format and arrange variables included in a list of information on a Project List, such as project awards. Use Lists for all groups of data to include in the template. The following groups of data within Unanet CRM require a List Data Format for a Project Lists:

- Project Awards
- Project References
- Project Certifications

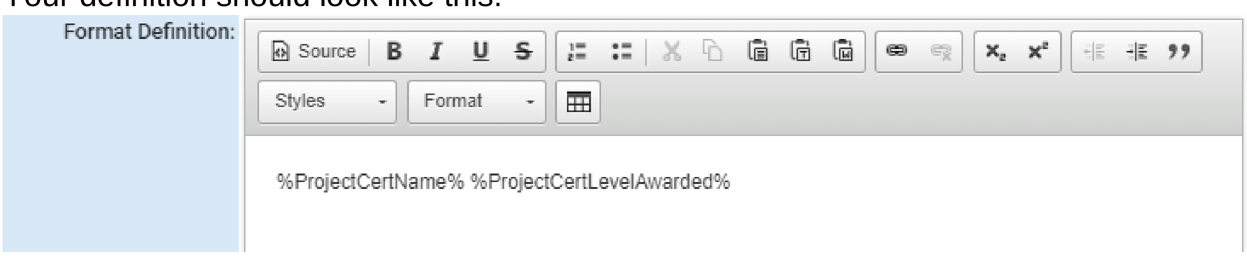
Activity 4.3 – Uploading a Project List Template

In this activity, you will create list data formatting and upload a Project List template from InDesign to Publisher 4.0.

Activity Steps

Part 1: Create List Data Formatting for Project Certifications

1. Select the **Publisher Manager** link.
2. Select **Template Administration > Project List**. The **Project List Administration** page opens.
3. Select the **List Data Formatting** link.
4. Select the **Create Format** link in the **List Data Formatting – List – Project Certifications** section. The **List - Project Certifications List Format** window opens.
5. Type *Standard_Cert_XX* in the **Format Name** field.
6. Select the **Document Data Dictionary** link. The **List - Project Certifications List Format** window opens. These are the available merge field names.
7. Press **Ctrl+F**.
8. Type *award* in the **Search** field.
9. Select **%ProjectCertLevelAwarded%** for **Level Awarded**.
10. Press **Ctrl+C**.
11. Return to the **List – Project Certifications List Format** window.
12. Select **, %ProjectCertDateCertifiedMY%**.
13. Press **Ctrl+V**.
14. Insert a space between the two variables, if necessary.
    Your definition should look like this:



15. Select the **Save** button.
16. Close the **Project List Data Dictionary** window.

Part 2: Upload the Project List Template

1. Select the **Document Templates** link.
2. Select the **+Upload Template** link. The **Upload Project List Layout Template** window opens.
3. Type *Thumbnail_Cert_XX* in the **Template Name** field.
4. Type *Include project thumbnail – keyword publisher* in the **Instructions** field.
5. Select the **Choose File** button. The **Open** window opens.
6. Select the **Standard_ProjectList_XX.idml** file.

7. Select the **Open** button. **Note:** You can also associate the project list template with a particular office, practice area, or territory. This allows users to filter the choices when selecting a template.
8. Select the **Save** button. The **Template** is added to **Publisher 4.0**.
9. Select the **Select** link for **List – Project Certifications**. The **Select a Format for Project Certifications** window opens.
10. Select the **Standard_Cert_XX** radio button.
11. Select the **Save** button.
12. Select the **Variables** dropdown arrow. Here you can view all the variables included in the template.

Create a Project List in Publisher 4.0

Use Publisher 4.0 to generate and store Project Lists populated with your Project data.

Once you create a Project List record, users with Publisher 4.0 permissions can access the record from the Publisher documentation grid.

Activity 4.4 – Creating a Project List Record

In this activity, you will create and generate a project list record.

Activity Steps

Part 1: Create a New Project List

1. Select the **Publisher Manager** link.
2. Select **Create Document > Project List**.
3. Type *Office/DataCenter_5YearsCommercial_XX* in the **Project List Name** field.
4. Select the **Save** button.

Part 2: Select the Layout

1. Select the **Select** link in the **Selected Layout (Body of your Document)** section. The **Select a Layout** window opens.
2. Select the **Thumbnail_Cert_XX** radio button.
3. Select the **Save** button. A warning message displays.
4. Select the **OK** button.

Part 3: Select the Project Image Settings

1. Select the **On** radio button for **Project Images**.
2. Select **By Keyword** for the **Image select method**.
3. Type *Publisher* in the **Image Keyword** field.

4. Select the **Save** button. **Note:** Select the **Save** button in the **Project Image Settings** section.

Part 4: Add Projects to the Project List Using Project List Criteria

1. Verify that the **Project List Criteria** radio button is selected in the **Project List Generation** section.
2. Select the **Save** button.
3. Select the **Search** button in the **Dynamically Generated Project List** section. The **Search** window opens.
4. Select **Data Center** for **Primary Categories** in the **Project Category/Types** section.
5. Select **Design-Build** for **Delivery Method** in the **Project Category/Types** section.
6. Select **LEED** for **Certification Name** in the **Project Certifications** section.
7. Select the **Search** button.
8. Select the **All** check box.
9. Select the **Save** button.

Part 5: Add Projects to the Project List Using Project Reports

1. Select the **Project Reports** radio button in the **Project List Generation** section.
2. Select the **Save** button.
3. Select **Commercial-Office/Data_Center last 5 years – Design Build** from the **Select Project Report** dropdown.
4. Select the **Save** button.

Part 6: Generate a Project List

1. Select the **Generate Document** button.
2. Select the **idml** link to download the **Project List**.
3. Select **Open** on the **Download** bar. The **Project List** opens in **InDesign**.

Check Your Understanding

Which one of the following variables is correctly written for replacing the client's phone number?

a) ProjectClientContactPhone
b) (ProjectClientContactPhone)
c) %ProjectClientContactPhone%

Which one of the following options do you use if you want Unanet CRM to replace an image in a template?

a) Select the Auto-fit check box
b) Embed the image
c) Use a variable for the image

Refer to Appendix A for answers to the Check Your Understanding questions.

LESSON 5: KNOWLEDGE PROFILES

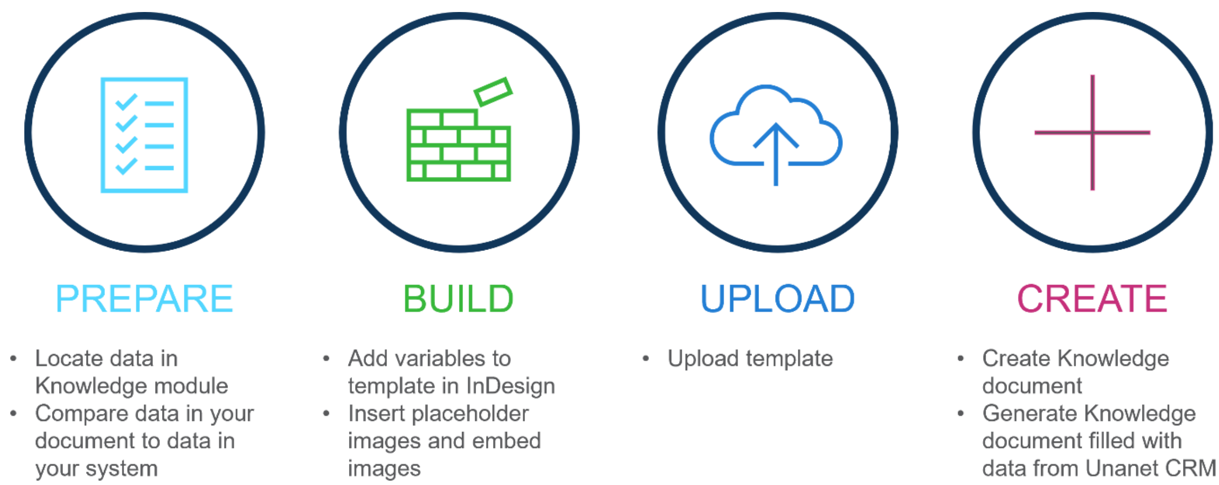
Learning Objectives

Explain how to create an InDesign Knowledge Document with Unanet CRM data.

- Explain how to create a Knowledge template.
- Recall how to upload a Knowledge template to Unanet CRM.
- Explain how to create and generate a Knowledge Profile document with CRM data.

Introduction

Use Unanet CRM's Publisher 4.0 to create Knowledge documents in the Unanet CRM account using designed templates and CRM data. Once created, you can access the Knowledge documents from the Publisher Manager documentation grid.



We recommend marking up a hard copy of your existing document with the Unanet CRM field names for each piece of data. This is a helpful reference document when you build your template.

Note: If you would like the template to auto-add additional pages when text overflows, set your primary text frame and place your variable in the primary text frame set to auto-add pages.

Prepare to Create a Knowledge Template

Any data you determine is essential to your design must be part of the Knowledge module in Unanet CRM. You may need to update these records before generating a Knowledge Profile.

Tour 5.1 – Preparing to Create a Knowledge Template

In this tour, you will learn about preparing to create a Knowledge template by reviewing corresponding information in the Knowledge module.

Build a Knowledge Template

Once you have identified which data fields to include in the Knowledge document, use the Document Data Dictionary to find the corresponding variables. Then, copy the Document Data Dictionary variables and paste them into your InDesign Knowledge template. You must save the Knowledge template with a file extension of .idml to upload the file to Unanet CRM.

Activity 5.2 – Creating a Knowledge Template

In this activity, you will create a Knowledge template.

Activity Steps

Part 1: Replace Field Names

1. Open the **Standard_KnowledgeTemplate.indd** file. **Note:** Select **Type > Show Hidden Characters** to show the paragraph marks if necessary.
2. Select the **Publisher 4.0** module.
3. Select **Template Administration > Knowledge Profile**. The **Knowledge Profile Administration** page opens.
4. Select the **Document Data Dictionary** link. The **Knowledge Profile Data Dictionary** window opens.
5. Select **%kpTitle%** for the **Knowledge Bit - Title**.
6. Press **Ctrl+C**.
7. Return to **InDesign**.
8. Select **Guaranteed Maximum Price (GMP)** in the header on the first page.
9. Press **Ctrl+V**.
10. Select **%kpDescription%** for the **Knowledge Bit – Description**.
11. Press **Ctrl+C**.
12. Select the **text** in the body of the document.

13. Press **Ctrl+V**.
14. Close the **Knowledge Profile Data Dictionary** window.

Part 2: Insert Placeholder Images and Embed

1. Select the **Direct Selection Tool** button.
2. Select the **first image**.
3. Select **File > Place**. The **Place** window opens.
4. Select an **image**.
5. Select the **Open** button.
6. Select the **Selection Tool** button.
7. Select the **placeholder image**.
8. Verify that the **Fill Frame Proportionally** button is selected.
9. Verify that the **Auto-Fit** check box is selected.
10. Select the **Links** tab.
11. Right-click the **placeholder image** name.
12. Select **Embed Link** from the menu.
13. Repeat steps **1-12** for the **second** image. Be sure to select a different placeholder image.

Part 3: Save the Knowledge Template

1. Select **File > Save As**. The **Save As** window opens.
2. Type *Standard_KP_W2Images_XX* in the **File name** field. **Note:** Replace **XX** with your initials.
3. Select **InDesign 2022 document** from the **Save as type** dropdown.
4. Select the **Save** button.
5. Select **File > Save As**. The **Save As** window opens.
6. Type *Standard_KP_W2Images_XX* in the **File name** field if not prepopulated.
7. Select **InDesign CS4 or later (IDML)** from the **Save as type** dropdown.
8. Select the **Save** button.
9. Close the **Standard_KP_W2Images_XX.indd** document.

Upload a Knowledge Template

Now that you have created your Knowledge template, including any embedded images and placed variables, and saved it as an .idml, you are ready to upload your template to Publisher 4.0.

You can upload and store multiple Knowledge templates on the Template Administration > Knowledge Profile Administration page.

Note: If you need to update an existing template, download it, adjust it, then save it over the existing system template. Saving over the existing automatically updates any Knowledge document using that template.

Activity 5.3 – Uploading a Knowledge Template

In this activity, you will upload a Knowledge template from InDesign to Publisher 4.0.

Activity Steps

1. Select the **Publisher Manager** link.
2. Select **Template Administration > Knowledge Profile**. The **Knowledge Profile Administration** page opens.
3. Select the **+Upload Template** link. The **Upload Knowledge Profile Layout Template** window opens.
4. Type *Standard_WImage2Pages_XX* in the **Template Name** field.
5. Type *Auto-add pages* in the **Instructions** field.
6. Select the **Choose File** button. The **Open** window opens.
7. Select the **Standard_KP_W2Images_XX.idml** file.
8. Select the **Open** button. **Note:** You can also associate the Knowledge template with a particular office, practice area, or territory. This allows users to filter the choices when selecting a template.
9. Select the **Save** button. The **Template** is added to **Publisher 4.0**.

Create a Knowledge Document

Use Publisher 4.0 to generate and store Knowledge records such as boilerplate policy or procedure narratives, project approaches, and roles and responsibilities populated with your Knowledge data.

Once you create a Knowledge Profile record, users can access the record from the Publisher 4.0 documentation grid.

Activity 5.4 – Creating a Knowledge Record

In this activity, you will create and generate a Knowledge record.

Activity Steps

Part 1: Create a New Knowledge Record

1. Select the **Publisher Manager** link.
2. Select **Create Document > Knowledge Profile**.
3. Type *GuaranteedMaximumPriceWImages_XX* in the **Knowledge Profile Name** field.
4. Type *Guaranteed Maximum Price (GMP)* in the **Knowledge** field.
5. Select the **Save** button.

Part 2: Select the Layout

1. Select the **Select** link in the **Selected Layout (Body of your Document)** section. The **Select a Layout** window opens.
2. Select the **Standard_WImage2Pages_XX** radio button.
3. Select the **Save** button. A warning message displays.
4. Select the **OK** button.

Part 3: Select Images

1. Select the **Select** link in the **Selected Images** section for the first image.
2. Select the **Construction-Site-1080x675.jpg** radio button.
3. Select the **Save and Crop** button.
4. Select the **Select** link in the **Selected Images** section for the second image.
5. Select the **153244.jpg** radio button.
6. Select the **Save and Crop** button.
   Note: The **Selected Document** functionality is for future development. Currently, attaching a document to an **InDesign Knowledge Profile** results in an error.

Part 4: Generate a Knowledge Document

1. Select the **Generate Document** button.
2. Select the **idml** link to download the **Knowledge** document.
3. Select **Open** on the **Download** bar. The **Knowledge** document opens in **InDesign**.
4. Select the **GMP Process** header.
5. Select the **Paragraph Styles** tab.
6. Select **H1 Resume, Project – Name**.
7. Repeat steps **4-6** for the remaining headers:
   - **LEAN Option**
   - **Administering the GMP**
   - **Savings**

Check Your Understanding

Which one of the following options best explains why you would associate a template with a specific office when uploading it to Publisher 4.0?

a) Limit which offices can use the template
b) Filter templates by office location
c) It is a required field on the form

Which one of the following is an example of a Knowledge bit available to use in a Knowledge Document?

a) Client
b) Phone Number
c) Title

Refer to Appendix A for answers to the Check Your Understanding questions.

LESSON 6: OPPORTUNITY PROFILES

Learning Objectives

Explain how to create an InDesign Opportunity Document with Unanet CRM data.

- Explain how to create an Opportunity Profile template.
- Recall how to upload an Opportunity Profile template to Unanet CRM.
- Explain how to create and generate an Opportunity Profile Document with CRM data.

Introduction

Unanet CRM's Publisher 4.0 module generates Opportunity records, such as letter proposals, cover letters, and proposal covers as Adobe InDesign files.

We recommend marking up a hard copy of your existing document with the Unanet CRM field names for each piece of data. This is a helpful reference document when you build your template.

Note: If you would like the template to auto-add additional pages when text overflows, set your primary text frame and place your variables in the primary text frame set to auto-add pages.

Prepare to Create an Opportunity Profile Template

Any data you determine is essential to your design must be part of the Opportunities module in Unanet CRM. You may need to update these records before generating an Opportunity Profile.

Tour 6.1 – Preparing to Create an Opportunity Template

In this tour, you will learn about preparing to create an Opportunity template by reviewing corresponding fields in an Opportunity record.

Build an Opportunity Profile Template

Once you have identified which data fields to include in the Opportunity document, use the Document Data Dictionary to find the corresponding variables. Then, copy the Document Data Dictionary variables and paste them into your InDesign Opportunity Profile template. You must save the Opportunity Profile template with a file extension of .idml to upload the file to Unanet CRM.

Activity 6.2 – Creating an Opportunity Template

In this activity, you will create an Opportunity template.

Activity Steps

Part 1: Replace Field Names

1. Open the **Standard_LetterProposal.indd** file.
2. Select **Type > Show Hidden Characters** to show the paragraphs marks and hidden characters.
3. Select the **Publisher 4.0** module.
4. Select **Template Administration > Opportunity Profile**. The **Opportunity Profile Administration** page opens.
5. Select the **Document Data Dictionary** link. The **Opportunity Profile Data Dictionary** window opens.
6. Press **Ctrl+F**.
7. Type *due* in the **Search** field.
8. Select **%OppProposalDueDate%** for the **Proposal Due Date**.
9. Press **Ctrl+C**.
10. Return to **InDesign**.
11. Select the **09/30/2022** text to the hidden character.
12. Press **Ctrl+V**.

13. Repeat steps **6-12** to replace data with **Field Name** variables.

Search	Field Name	Template
Contactrole	%OppContactRoleClientContact%	Donald Doorman
Contactrole	%OppContactRoleClientContactTitle%	Project Executive
Clientname	%OppClientName%	Blue Lake Facility
Address	%OppClientAddress1%	6957 County Road 101 E
Address	%OppClientAddress2%	Suite 100
City	%OppClientCity%	Shakopee
State	%OppClientStateAbbrev%	MN
Zipcode	%OppClientZipcode%	55379
Name	%OppName%	HiHo Office/Data Center Plan Review Services
Oppcontact	%OppContactRoleClientContactFirstName%	Donald
Description	%OppDescription%	BACKGROUND and SCOPE OF SERVICES text
Fee	%OppFirmEstimatedFee%	88,000
Staff Team	%OppStaffTeamProjectEngineer%	Andey Ridley
Staff Team	%OppStaffTeamProjectEngineerTitle%	Project Coordinator
StartDate	%OppEstimatedStartDateMY%	January 2023
Leadbus	%OppStaffTeamLeadBusinessDeveloperOfficePhone%	(800) 505-7089
Leadbus	%OppStaffTeamLeadBusinessDeveloperOfficeEmail%	nolan@company.com
Leadbus	%OppStaffTeamLeadBusinessDeveloper%	Nolan Kegger
Leadbus	%OppStaffTeamLeadBusinessDeveloperTitle%	Marketing/Biz Dev

14. Press **Ctrl+F**. The **Find/Change** panel opens.
15. Type *Blue Lake Facility* in the **Find what** field.
16. Type *%OppClientName%* in the **Change to** field.
17. Select the **Find Next** button.
18. Select the **Change All** button.
19. Select the **OK** button.
20. Select the **Done** button.

Part 2: Replace Field Names in the Footer of the Parent Page

1. Select the **Pages** tab.
2. Double-click the **Parent** page.
3. Return to the **Opportunity Profile Data Dictionary** window.
4. Select **%OppName%** for the **Opportunity Name**.
5. Press **Ctrl+C**.
6. Return to **InDesign**.

7. Select the **HiHo Plan Review Services** text to the hidden character.
8. Press **Ctrl+V**.
9. Return to the **Opportunity Profile Data Dictionary** window.
10. Select **%OppProposalDueDate%** for the **Proposal Due Date**.
11. Press **Ctrl+C**.
12. Return to **InDesign**.
13. Select the **09/30/2022** text to the hidden character.
14. Press **Ctrl+V**.
15. Close the **Opportunity Profile Data Dictionary** window.

Part 3: Save the Opportunity Template

1. Select **File > Save As**. The **Save As** window opens.
2. Type *PlanReviewSvcs_Proposal_XX* in the **File name** field. **Note:** Replace **XX** with your initials.
3. Select **InDesign 2022 document** from the **Save as type** dropdown.
4. Select the **Save** button.
5. Select **File > Save As**. The **Save As** window opens.
6. Type *PlanReviewSvcs_Proposal_XX* in the **File name** field if not prepopulated.
7. Select **InDesign CS4 or later (IDML)** from the **Save as type** dropdown.
8. Select the **Save** button.
9. Close the **PlanReviewSvcs_Proposal_XX.indd** document.

Upload an Opportunity Profile Template

Now that you have created your Opportunity Profile template, including placed variables, and saved it as an .idml, you can upload your template to Publisher 4.0.

You can upload and store multiple Opportunity Profile templates on the Template Administration > Opportunity Profile Administration page.

Note: If you need to update an existing template, download it, adjust it, then save it over the existing system template. Saving over the existing template automatically updates any Opportunity Profile record using that template.

List Data Formatting

List Data Formatting allows you to format and arrange variables included in a list of information on an Opportunity Profile. Use Lists for all groups of data to include in the template. The data group, Quotes, requires a List Data Format for an Opportunity Profile. **Note**: This requires you to have Products & Quotes enabled for your firm. This course does not cover Projects & Quotes.

Activity 6.3 – Uploading an Opportunity Template

In this activity, you will upload an Opportunity template from InDesign to Publisher 4.0.

Activity Steps

1. Select the **Publisher Manager** link.
2. Select **Template Administration > Opportunity Profile**. The **Opportunity Profile Administration** page opens.
3. Select the **+Upload Template** link. The **Upload Opportunity Profile Layout Template** window opens.
4. Type *Standard_Plan_Review_Proposal_XX* in the **Template Name** field.
5. Select the **Choose File** button. The **Open** window opens.
6. Select the **PlanReviewSvcs_Proposal_XX.idml** file.
7. Select the **Open** button.
8. Type *Standard plan review services letter proposal with subtasks* in the **Instructions** field. **Note:** You can also associate the Opportunity template with a particular office, practice area, or territory. This allows users to filter the choices when selecting a template.
9. Select the **Save** button. The **Template** is added to **Publisher 4.0**.

Create an Opportunity Profile Record

Use Publisher 4.0 to generate and store Opportunity Profile records such as letter proposals, cover letters, and proposal covers populated with your Opportunity data.

Once you create an Opportunity Profile record, users can access the record from the Publisher documentation grid.

Note: If you generate an Opportunity document, such as a letter proposal, and later make edits, we recommend you upload a pdf of your final Opportunity documents to the Opportunity record for future reference.

Activity 6.4 – Creating a Letter Proposal

In this activity, you will create and generate a letter proposal.

Activity Steps

Part 1: Create a New Letter Proposal

1. Select the **Publisher Manager** link.
2. Select **Create Document > Opportunity Profile**.
3. Type *HiHo Plan Review Services_XX* in the **Opportunity Profile Name** field.
4. Type *(*18-2801*) HiHo Office/Data Center Plan Review Services* in the **Opportunity** field.
5. Select the **Save** button.

Part 2: Select the Layout

1. Select the **Select** link in the **Selected Layout (Body of your Document)** section. The **Select a Layout** window opens.
2. Select the **Standard_Plan_Review_Proposal_XX** radio button.
3. Select the **Save** button. A warning message displays.
4. Select the **OK** button.

Part 3: Generate the Document

1. Select the **Generate Document** button.
2. Select the **idml** link to download the Opportunity document.
3. Select **Open** on the **Download** bar. The Opportunity document opens in **InDesign**.
4. Press **Ctrl+F**. The **Find/Change** window opens.
5. Type *%* in the **Find what** field.
6. Select the **Find Next** button. There are no results. This indicates that Publisher populated all the variables with data.
7. Select the **OK** button.

8. Select the **Done** button.
9. Select **File > Adobe PDF Presets > [High Quality Print]**. The **Export** window opens.
10. Type *OfficeAndDataCenter_XX* in the **File Name** field.
11. Select the **Save** button. The **Export Adobe PDF** window opens.
12. Select the **Export** button.

Part 4: Save a Copy of the Letter Proposal Document in the Opportunity Record

1. Return to **Publisher 4.0**.
2. Right-click the **HiHo Office/Data Center Plan Review Services (18-2801)** link.
3. Select the **Open link in a new tab**.
4. Select the new **Unanet CRM** tab.
5. Select **More > Documents** to save a copy of the letter proposal document in the Opportunity record.
6. Select the **+ Document** link. The **Upload a Document** window opens.
7. Select the **Choose File** button.
8. Select the **OfficeAndDataCenter_XX.pdf** file.
9. Select the **Open** button.
10. Type *LetterProposal_Today's date_XX* in the **Title** field.
11. Type *office permitting* in the **Document Metadata** field.
12. Select the **Save** button.
13. Select **More > Documents**. A copy of the document is available for download in the **Documents** section.

Check Your Understanding

Which file extensions must you use when saving to upload an InDesign template to Publisher 4.0?

a) .indd
b) .idml
c) .indt

What type of document can you create from an Opportunity record?

a) Project List
b) Letter Proposal
c) Resume

Refer to Appendix A for answers to the Check Your Understanding questions.

LESSON 7: BATCHING DOCUMENTS

Learning Objectives

Explain how to create an InDesign Batch Job.

- Explain how to make existing templates batch ready.
- Explain how to create a batch job.

Introduction

Publisher 4.0 can batch-generate several different documents and document types into one .idml file. To make this work as anticipated, ensure all your templates have the same uniquely named Parent Pages and Paragraph/Character Styles.

Prepare Templates for Batch Jobs

To prepare your templates to be batch-ready, you need to bring all templates into one master InDesign file, including Parent pages and Paragraph/Character Styles. After all the templates are saved as one template and have appropriate Parent pages and text styles applied, you save each template as individual files. Next, upload the individual batch-ready .idmls to their Template Administration pages in Publisher 4.0.

Activity 7.1 – Preparing Templates for a Batch Job

In this activity, you will prepare templates for a batch job.

Activity Steps

Part 1: Combine the Opportunity Proposal and Knowledge Document to Create a Master Template

1. Open the **PlanReviewSvcs_Proposal_XX.indd** file.
2. Open the **Standard_KP_W2Images_XX.indd** file.
3. Select **Window > Arrange > 2-up Vertical**. InDesign arranges the two templates side by side.
4. Select the **Pages** tab for the **PlanReviewSvcs_Proposal_XX.indd** template.
5. Drag the **OP1-OppProfile** page to the **Standard_KP_W2Images_XX.indd** template.
6. Select thumbnails **1-3** in the **Pages** tab of **PlanReviewSvcs_Proposal_XX**.
7. Drag the **thumbnails** to the **Standard_KP_W2Images_XX.indd** template. The **Insert Pages** dialog box opens.
8. Select **At Start of Document** from the **Insert** dropdown.
9. Select the **OK** button.

Part 2: Load Paragraph Styles, If Necessary

If the font in the **PlanReviewSvcs_Proposal_XX** changes to **Minion Pro** once dragged over, you must **Load Paragraph Styles**.

1. Select the **Paragraph Styles** tab.
2. Select **More > Load Paragraph Styles**. The **Open a File** window opens.
3. Double-click the **PlanReviewSvcs_Proposal_XX.indd** file. The **Load Styles** window opens.
4. Select the **OK** button.
5. Close the **PlanReviewSvcs_Proposal_XX.indd** file.
6. Select **File > Save As**. The **Save As** window opens.
7. Type *Master_Templates_XX* in the **File name** field. **Note:** Replace **XX** with your initials.
8. Select **InDesign 2022 document** from the **Save as type** dropdown.
9. Select the **Save** button.

Part 3: Add the Project Profile to the Master Template

1. Open the **PP_3ImagesClientQuote_XX.indd** file.
2. Select **Window > Arrange > 2-up Vertical**. InDesign arranges the two templates side by side.
3. Select the **Pages** tab for the **PP_3ImagesClientQuote_XX.indd** template.
4. Drag the **PP-ProjectProfile** page to the **Master_Templates_XX.indd** template.
5. Select thumbnail **1** in the **Pages** tab.
6. Drag the **thumbnail** to the **Master_Templates_XX.indd** template. The **Insert Pages** dialog box opens.
7. Select **At End of Document** from the **Insert** dropdown.
8. Select the **OK** button.
9. Close the **PP_3ImagesClientQuote_XX.indd** file. **Note:** Select the **No** button if a save message displays.

Part 4: Add the Resume to the Master Template

1. Open the **Standard_Headshot_XX.indd** file.
2. Select **Window > Arrange > 2-up Vertical**. InDesign arranges the two templates side by side.
3. Select the **Pages** tab for the **Standard_Headshot_XX.indd** template.
4. Drag the **R-Resume** page to the **Master_Templates_XX.indd** template.
5. Select thumbnail **1** in the **Pages** tab.
6. Drag the **thumbnail** to the **Master_Templates_XX.indd** template. The **Insert Pages** dialog box opens.
7. Select **At End of Document** from the **Insert** dropdown.
8. Select the **OK** button.
9. Select the **R 1** thumbnail.
10. Review the **Resume** page for orange highlighted text. An orange highlight indicates that there is an issue with the styles.

11. Select the **Paragraph Styles** tab.
12. Select **More > Load Paragraph Styles**. The **Open a File** window opens.
13. Select the **Standard_Headshot_XX.indd** file.
14. Select the **Open** button. The **Load Styles** window opens. The styles that are in use are selected.
15. Select the **OK** button. The style is fixed in the **Master Template**.
16. Close the **Standard_Headshot_XX.indd** file.

Part 5: Add the Project List to the Master Template

1. Open the **Standard_ProjectList_XX.indd** file.
2. Select **Window > Arrange > 2-up Vertical**. InDesign arranges the two templates side by side.
3. Select the **Pages** button for the **Standard_ProjectList_XX.indd** template.
4. Drag the **PL-ProjectList** page to the **Master_Templates_XX.indd** template.
5. Select thumbnail **1** in the **Pages** tab.
6. Drag the **thumbnail** to the **Master_Templates_XX.indd** template. The **Insert Pages** dialog box opens.
7. Select **At End of Document** from the **Insert** dropdown.
8. Select the **OK** button.
9. Close the **Standard_ProjectList_XX.indd** file.
10. Select **File > Save**.

Part 6: Check the Parent Page

1. Select the **Pages** tab.
2. Verify that each **Parent** page has a unique name.

Part 7: Check Styles Overrides

1. Select **Window > Utilities > Scripts**. The **Script** window opens.
2. Expand the **Community** folder.
3. Right-click **ClearStyleOverrides > Run Script**. The **Clear style overrides** window opens.
4. Select the **Clear overrides** button.
5. Select **File > Save**.
6. Close the **Script** window.

Part 8: Check Images

1. Verify that every placeholder image is a unique image.
2. Verify that each placeholder image is embedded.

Part 9: Save Individual Templates

1. Select the **Pages** tab for the **Master_Template_XX.indd** template.
2. Select thumbnails **KP4, KP5, KP6, PP6, R7, and PL8** in the **Pages** tab.
3. Select the **Delete** button. A warning message displays.

4. Select the **OK** button.
5. Select **File > Save As**. The **Save As window** opens. **Note:** Create a folder named *BatchReady.*
6. Type *PlanReviewSvcs_Proposal_BR_XX* in the **File name** field.
7. Select **InDesign 2022 document** for **Save as type**.
8. Select the **Save** button.
9. Select **File > Save As**. The **Save As window** opens.
10. Select **InDesign CS4 or later (IDML)** for **Save as type**.
11. Select the **Save** button.
12. Close the **PlanReviewSvcs_Proposal_BR_XX.indd** file.
13. Open the **Master_Template_XX** file.
14. Repeat steps 1-13 to save the remaining individual templates.

Page	Delete (Use Ctrl+select)	File Name
Knowledge Profile	OP11-OP13, PP6, R7, PL8	Standard_KP_W2Images_BR_XX
Project Profile	OP11-OP13, KP4-KP5, R7, PL8	PP_3ImagesClientQuote_BR_XX
Resume	OP11-OP13, KP4-KP5, PP6, PL8	Standard_Headshot _BR_XX
Project List	OP11-OP13, KP4-KP5, PP6, R7	Standard_ProjectList_BR_XX

Activity 7.2 – Uploading Batch-Ready Templates

In this activity, you will upload batch-ready templates.

Activity Steps

Part 1: Upload the Project Profile Template

1. Select the **Publisher 4.0** module.
2. Select **Template Administration > Project Profile**.
3. Select the **Pencil** icon for the **Standard_W3Images_XX** template. The **Edit Project Profile Layout Template** window opens.
4. Type *Project_3Images_BR_XX* in the **Template Name** field.
5. Select the **Choose File** button. The **Open** window opens.
6. Select the **PP_3ImagesClientQuote_BR_XX.idml** file.
7. Select the **Open** button.
8. Select the **Save** button. The **Template** is added to **Publisher 4.0**.
9. Select the **Select** link for **List – Project Certifications**. The **Select a Format for List – Project Certification** window opens.
10. Select the **Standard_InDesign_XX** radio button.
11. Select the **Save** button.
12. Select the **Select** link for **List – Project References**. The **Select a Format for List – Project References** window opens.
13. Select the **Standard_InDesign_XX** radio button.
14. Select the **Save** button.

Part 2: Upload the Knowledge Profile Template

1. Select the **Publisher Manager** link.
2. Select **Template Administration > Knowledge Profile**.
3. Select the **Pencil** icon for the **Standard_WImage2Pages_XX** template. The **Edit Knowledge Profile Layout Template** window opens.
4. Type *Standard_WImage2Pages _BR_XX* in the **Template Name** field.
5. Select the **Choose File** button. The **Open** window opens.
6. Select the **Standard_KP_W2Images_BR_XX.idml** file.
7. Select the **Open** button.
8. Select the **Save** button.

Part 3: Upload the Resume Template

1. Select the **Publisher Manager** link.
2. Select **Template Administration > Resume**.
3. Select the **Pencil** icon for the **StandardWImage_XX** template. The **Edit Resume Layout Template** window opens.
4. Type *Resume_Headshot_BR_XX* in the **Template Name** field.
5. Select the **Choose File** button. The **Open** window opens.
6. Select the **Standard_Headshot_BR_XX.idml** file.
7. Select the **Open** button.
8. Select the **Save** button.
9. Select the **Select** link for **List - Education**. The **Select a Format for Education** window opens.
10. Select the **Standard_InDesignWYear_XX** radio button.
11. Select the **Save** button.
12. Repeat steps **9-11** to select a format for the remaining list variables.

List Variable	**Format**
List - Other Registrations	Standard_InDesign_XX
List - Project Experience	Standard_InDesign_XX
List - Registrations	Standard_InDesign_XX

Part 4: Upload the Project List Template

1. Select the **Publisher Manager** link.
2. Select **Template Administration > Project List**.
3. Select the **Pencil** icon for the **Thumbnail_Cert_XX** template. The **Edit Project List Layout Template** window opens.
4. Type *ProjectList_WThumbnail_BR_XX* in the **Template Name** field.
5. Select the **Choose File** button. The **Open** window opens.
6. Select the **Standard_ProjectList_BR_XX.idml** file.
7. Select the **Open** button.
8. Select the **Save** button.

9. Select the **Select** link for **List – Project Certifications**. The **Select a Format for Project Certifications** window opens.
10. Select the **Standard_Cert_XX** radio button.
11. Select the **Save** button.

Part 5: Upload the Opportunity Profile Template

1. Select the **Publisher Manager** link.
2. Select **Template Administration > Opportunity Profile**.
3. Select the **Pencil** icon for the **Standard_Plan_Review_Proposal_XX** template. The **Edit Opportunity Profile Layout Template** window opens.
4. Type *Standard_Plan_Review_Proposal_BR_XX* in the **Template Name** field.
5. Select the **Choose File** button. The **Open** window opens.
6. Select the **PlanReviewSvcs_Proposal_BR_XX.idml** file.
7. Select the **Open** button.
8. Select the **Save** button.

Demo 7.3 – Exploring Batch Jobs Tab, Filters, and Columns

In this demo, you will explore the Batch Jobs tab, its filters, and columns.

Demo Steps

1. Select the **Publisher 4.0** module.
2. Select the **Batch Jobs** tab.
3. Select the **Job Name** dropdown arrow. A menu displays. You can sort ascending or descending and select which columns to display.
4. Select the **Template Type** header and drag after the **Created By** header to reposition columns in the grid.
5. Select **Template Type > Group By This Field**. The grid groups templates by template type.
6. Review the **Filters**. You can **Filter by Project** or **Filter by Opportunity**.

Create a Batch Job

You can create a batch by selecting documents of the same type (for example, InDesign) in the document grid or from the Batch Jobs tab.

Activity 7.4 – Creating a Batch Job

In this activity, you will create a batch job.

Activity Steps

Part 1: Create a Batch Job from the Documentation Grid

1. Select the **Publisher 4.0** module.
2. Select the check boxes for the following documents:

Document Name	Template Name
GuaranteedMaximumPriceWImages_XX	Standard_KP_W2Images_BR_XX
HiHo_Plan_Review_Services_XX	PlanRevewSvcs_Proposal_BR_XX
Office/Data_Center_5years_Commercial_XX	Standard_ProjectList_BR_XX
Stadium_Office_Complex_3Images_1Quote_XX	PP_3ImagesClientQuote_BR_XX
AlexHoffman_Standard1Image_XX	Standard_Headshot _BR_XX

3. Select the **New Batch Job** button. The **New Job** window opens.
4. Type *HiHo_Plan_Review_XX* in the **Job Name** field.
5. Select **InDesign** for the **Template Type**.
6. Select **idml** for the **Output Format**.
7. Select the **Merge** check box.
8. Select the **Knowledge Profile** in the **Job Documents** list and drag it to the position below the **Opportunity Profile**.

Part 2: Run and Download the Batch Job

1. Select the **Save & Run** button. The **Success** dialogue box opens.
2. Select the **OK** button.
3. Select the **Batch Job** tab to watch the progress of the job. **Note:** If you do not see your batch job in the list, select the **Refresh** button.
4. Select **HiHo Plan Review_XX** in the list. The document publishing details display at the bottom of the screen.
5. Select the **Download Merged Documents** button when the job is 100% complete.
6. Select **Open** on the **Download** bar. The document opens in **InDesign**.
7. Scroll through the pages of the document.
8. Delete any blank pages, if necessary.

Activity 7.5 – Editing a Batch Job

In this activity, you will edit a batch job.

Activity Steps

1. Return to **Publisher 4.0**.
2. Select the **HiHo_Plan_Review_XX** dropdown arrow.
3. Select **Edit Job**. The **Edit Job** window opens.
4. Select the **Opportunity Profile** in the **Job Documents** list.
5. Select the **Down** button to move the **Opportunity Profile** to the end of the list.
6. Select the **Save & Run** button. A success message displays.
7. Select the **OK** button.
8. Select the **Download Merged Documents** button when the job is 100% complete.
9. Select **Open** on the **Download** bar. The document opens in **InDesign**.

Check Your Understanding

Arrange the steps of batching in the correct order.

Steps	Order
Create a new batch job.	
Select the documents to include in the batch job.	
Run and download the batch job.	
Save each template type individually from the master template.	
Upload the individual templates to Publisher 4.0.	
Combine individual templates into one master template.	

Refer to Appendix A for answers to the Check Your Understanding questions.

APPENDIX: CHECK YOUR UNDERSTANDING ANSWER KEY

Lesson 1: Introduction to Publisher 4.0

Determine if each statement is true or false.

	True or False
You can change the position of the columns in the document grid.	T
You are unable to save searches in Publisher 4.0.	F
You build your template using Publisher 4.0.	F
You can add and remove columns from the document grid.	T

Lesson 2: Resumes

Which one of the following options do you use for viewing the available variables?

a) Document Data Dictionary
b) Template Administration
c) List Data Formatting

Which one of the following options allows you to format and arrange variables included in a list of information?

a) Document Data Dictionary
b) Template Administration
c) List Data Formatting

Lesson 3: Project Profiles

Where do you embed your firm logo so that Publisher 4.0 does not replace it with a record image?

a) Project record in Publisher 4.0
b) Parent page in InDesign
c) You cannot embed a logo

Which one of the following options is necessary if you have more than one image in a template?

a) Use a different placeholder image for each image
b) Save the images to the Parent page of the template
c) Each template can only have one image

Lesson 4: Project Lists

Which one of the following variables is correctly written for replacing the client's phone number?

a) ProjectClientContactPhone
b) (ProjectClientContactPhone)
c) %ProjectClientContactPhone%

Which one of the following options do you use if you want Unanet CRM to replace an image in a template?

a) Select the Auto-fit check box
b) Embed the image
c) Use a variable for the image

Lesson 5: Knowledge Profiles

Which one of the following options best explains why you would associate a template with a specific office when uploading it to Publisher 4.0?

a) Limit which offices can use the template
b) Filter templates by office location
c) It is a required field on the form

Which one of the following is an example of a Knowledge bit available to use in a Knowledge Document?

a) Client
b) Phone Number
c) Title

Lesson 6: Opportunity Profiles

Which one of the following file extensions must you use when saving to upload an InDesign template to Publisher 4.0?

a) .indd
b) .idml
c) .indt

What type of document can you create from an Opportunity record?

a) Project List
b) Letter Proposal
c) Resume

Lesson 7: Batching Document

Arrange the steps of batching in the correct order.

Steps	Order
Create a new batch job.	5
Select the documents to include in the batch job.	4
Run and download the batch job.	6
Save each template type individually from the master template.	2
Upload the individual templates to Publisher 4.0.	3
Combine individual templates into one master template.	1

COMPLETION CERTIFICATE AND EVALUATION

When the course has finished, Unanet University staff will mark the attendance in the Learning Management System (LMS.) This marking is percentage based and may be prorated if a participant was absent for any period of time during the course.

The LMS will generate a completion certificate (including **CPE credits**, where applicable) which will be available to the participant under their Transcript section of the LMS.

We appreciate your feedback on our courses and encourage you to complete the course evaluation.