Unanet University

UNANET CRM:
USING PUBLISHER WITH MICROSOFT WORD

PARTICIPANT GUIDE

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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

- VirtualUU@unanet.com

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 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 review tasks specific to the Publisher 4.0 module and Microsoft Word, such as creating and uploading templates and generating Microsoft Word documents with your Unanet CRM data.

Learning Objectives

After this session of **Unanet CRM: Using Publisher with Microsoft Word**, participants will be able to:

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

Publisher 4.0 is neither associated nor integrated with Microsoft 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 various roles to perform various job functions.

During this course, we instruct students 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

You can easily adapt the activities in this course 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

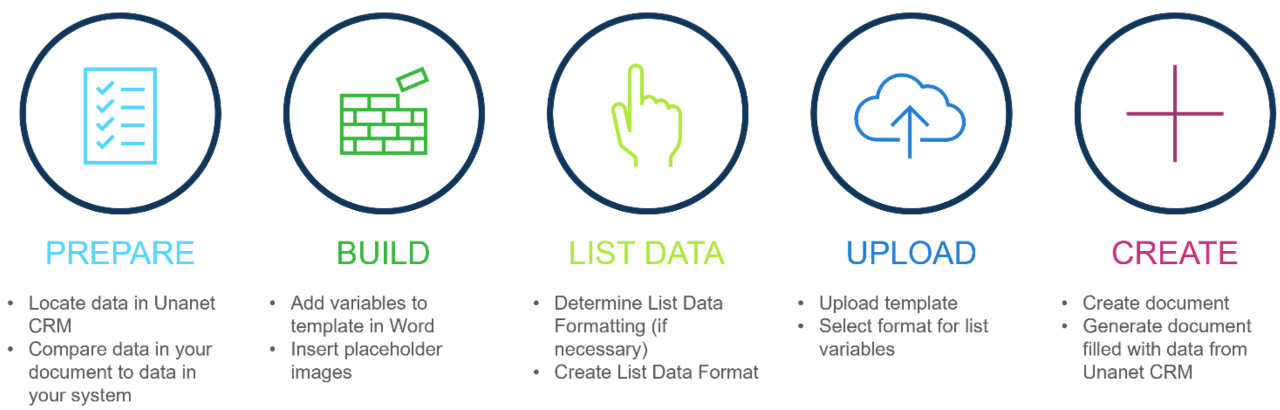
Learning Objectives

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.
- Explain how to configure the WYSIWYG settings for Publisher 4.0.

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.



Tour 1.1 – Example Documents

In this tour, you will view 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 Documents

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 will learn about the Publisher 4.0 interface.

Activity Steps

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

Configure WYSIWYG Settings for Publisher 4.0

You can define the desired functionality of your HTML editor and how it handles when a user presses the Enter key in various fields affecting Microsoft Word formatting.

Mode	Code	Description
Paragraph Mode		Defines a paragraph – automatically adds a single blank line before and after each <p> element.
Break Mode	 	Inserts a single line break in the text (forced-line break, soft-return, carriage-return).
Div Mode		A generic container for a block of content. No effect on the content or layout until styled in some way using CSS.

Demo 1.4 – Configuring WYSIWYG Editor Settings

In this activity, you will configure the WYSIWYG Editor Settings for Publisher 4.0.

Activity Steps

1. Select the **Administration** icon on the **Unanet CRM** header. The **Administration** menu opens.
2. Select **General Administration**. The **Administration** page opens.
3. Select the **Firm Setup** tab.
4. Scroll down to the **WYSIWYG Editor Settings** section.
5. Use the information in the table below to update the **WYSIWYG Editor Settings**.

Setting	Mode
Personnel Previous Project Experience	Div Mode
Personnel Project Experience	Div Mode
Project Description	Div Mode
Project Description for Publisher Resumes	Div Mode
Publisher Format HTML	Div Mode

6. Select the **Save** 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.	
You update WYSIWYG settings using Publisher 4.0.	

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

LESSON 2: RESUMES

Learning Objectives

Explain how to create a Microsoft Word Resume with Unanet CRM data.

- Explain how to create a Microsoft Word Resume Template.
- 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.

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.

Note: Set up and apply all styles and formatting to the Word document before adding placeholder images and variables.

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. **Note:** Publisher will use the image marked as Primary Portrait in the Personnel record for the Resume.

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 Word Resume template. You Must save the Resume template with a file extension of .docx to upload the file to Unanet CRM.

Document Data Dictionary

The Document Data Dictionary contains all the 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.
Note: The paragraph styles used in the templates are already created and applied to the text.

Activity Steps

Part 1: Save the Resume Template

1. Open the **Standard_Resume.docx** file.
2. Select the **Show/Hide** icon on the **Home** tab.
3. Select **File > Save a Copy**. The **Save a Copy** window opens.
4. Type *Standard_Headshot_XX* in the **File name** field. **Note:** Replace **XX** with your initials.

5. Select **Word Document (*.docx)** from the **Save as type** dropdown.
6. Select the **Save** button.

Part 2: Put Placeholder Image in the Template

1. Right-click the **headshot** image.
2. Select **Change Picture > This Device**. The **Insert Picture** window opens.
3. Select the **Headshot_placeholder.png** image.
4. Select the **Insert** button.
5. Select the **placeholder.png** image.
6. Select the **Picture Format** tab **> Crop > Fill**.

Part 3: Replace Field Names

1. Select the **Publisher 4.0** module.
2. Select **Template Administration > Resume**. The **Resume Administration** page opens.
3. Select the **Document Data Dictionary** link. The **Resume Data Dictionary** window opens.
4. Press **Ctrl+F**.
5. Type *formal* in the **Search** field.
6. Select **%ResumeFormalName%** for **Personnel Formal Name**.
7. Press **Ctrl+C**.
8. Return to **Word**.
9. Select the **Alex Hoffman, LEED AP, NCARB** text to the paragraph marker.
10. Press **Ctrl+V**.
11. 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
Years	%ResumeYearsInIndustry%	20 years
Years	%ResumeYearsWithFirm%	18 years
Education	%ResumeListEducation%	Education
Registration	%ResumeListRegistrations%	Architect, No. C2100, CA
Registration	%ResumeListOtherRegistrations%	LEED AP NCARB

12. Delete remaining listings for **Relevant Experience**.
13. Close the **Resume Data Dictionary** window.

Part 4: Include a Section Break and Unlink Header and Footer from Previous

These steps are necessary to batch documents together using the Publisher tool allowing each template's header and footer to be applied.

1. Place the cursor after the **%ResumeListProjectExperience%** variable.

2. Press **Return**.
3. Press **Return** again.
4. Place the cursor at the **last paragraph mark**.
5. Select the **Layout** tab.
6. Select **Breaks > Section Breaks > Next Page**.
7. Select **Section Break (Next Page)**.
8. Select the **Normal** tile in the **Styles** section.
9. Double-click the **next section's** header.
10. Select the **Link to Previous** button to unlink the header from the previous header.
11. Select the **Go to Footer** button.
12. Select the **Link to Previous** button to unlink the footer from the previous footer.
13. Select the **Save** button.
14. Close the **Resume** template. **Note**: You must close your **Word** template before uploading it to **Publisher 4.0**.

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 2.3 – Creating List Data Formatting

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

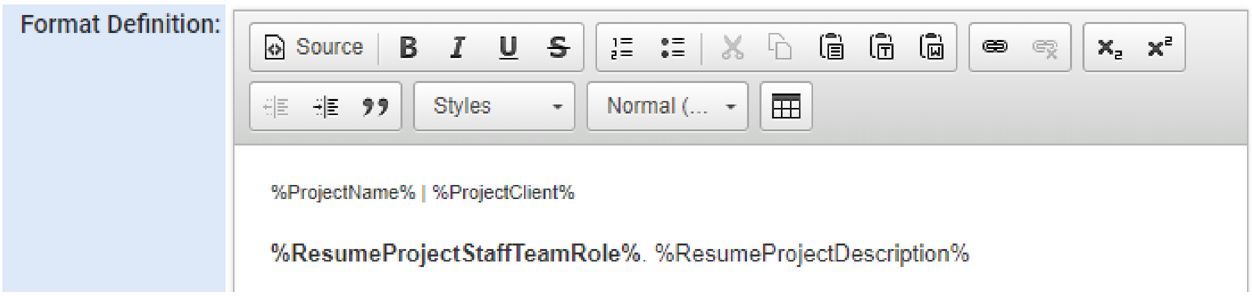
Activity Steps

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_Word_XX* in the **Format Name** field.
6. Replace the **comma + space** between **%ProjectName%, %ProjectClient%** with **space | space**.
7. Remove the **–** after **%ProjectClient%**.
8. Place your **cursor** after **%ProjectClient%.**
9. Press **Return**.
10. Select **%ProjectName% | %ProjectClient%**.

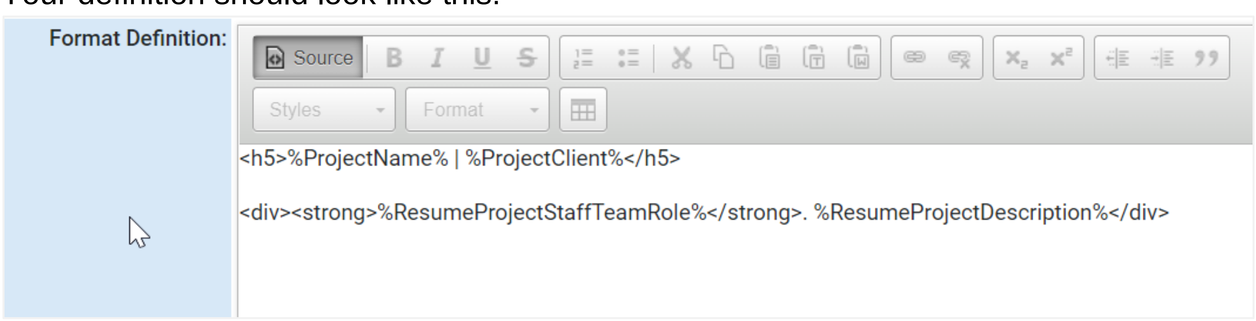
11. Select the **Normal** button.
12. Select **Heading 5** to apply the style to **%ProjectName% | %ProjectClient%**.
13. Select the **Document Data Dictionary** link. The **Resume Data Dictionary** window opens. These are the available merge field names.
14. Press **Ctrl+F**.
15. Type *role* in the **Search** field.
16. Select **%ResumeProjectStaffTeamRole%** for **Project Personnel Staff Team Role**.
17. Press **Ctrl+C**.
18. Return to the **Project Experience List Format** window.
19. Place your **cursor** at the beginning of **%ResumePersonnelProjectDescription%**.
20. Press **Ctrl+V**.
21. Type . at the end of the pasted variable.
22. Select **%ResumeProjectStaffTeamRole%**.
23. Select the **B** icon.
24. Select **Personnel** in **%ResumePersonnelProjectDescription%**.
25. Press **Delete**.

    Your definition should look like this:



26. Select the **Source** button.

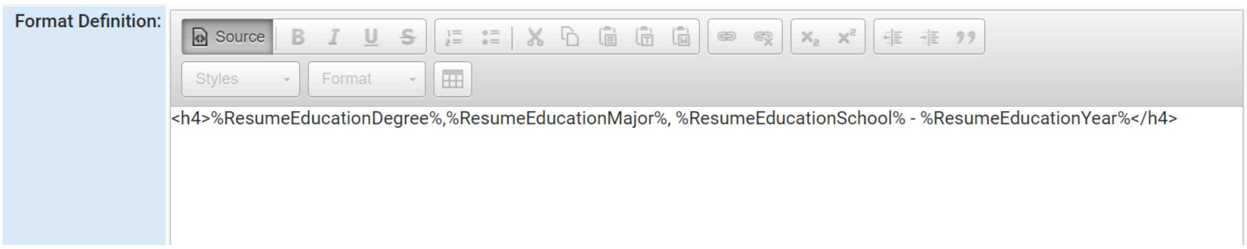
    Your definition should look like this:



27. Select the **Save** button.
28. 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_WordWYear_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.
13. Select **Format > Heading 4** to apply to the entire **Format Definition**.
    Your definition should look like this:

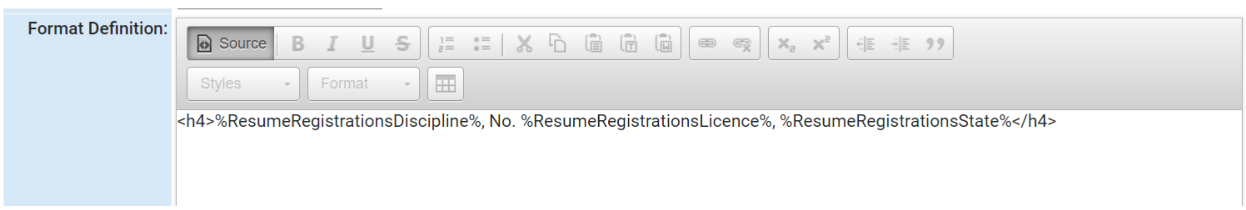


14. Select the **Save** button.
15. Close the **Resume Data Dictionary** window.

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_Word_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**.
29. Select **Format > Heading 4** to apply to the entire **Format Definition**. Your definition should look like this:



30. Select the **Save** button.
31. 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_Word_XX* in the **Format Name** field.
3. Select **- %ResumeListOtherDiscipline% (%ResumeListOtherRegistrationsOrganizations%) %ResumeListOtherYearFirstReg%** in the **Format Definition** field.
4. Press **Delete**.
5. Select **Format > Heading 4** to apply to the entire **Format Definition**.
6. Select the **Save** button.

Upload a Resume Template

Now that you have created your Resume template included a placeholder image, placed variables, formatted lists, saved it as a .docx, and closed the file, you can 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 2.4 – Uploading a Resume Template

In this activity, you will upload a Resume template 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.docx** 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_WordWYear_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_Word_XX
List - Project Experience	Standard_Word_XX
List - Registrations	Standard_Word_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 to add 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 2.5 – 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 order determines project order. You can remove the records from the list.

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 **.docx** link to download the **Resume**.
3. Select **Open** on the **Download** bar. The **Resume** opens in **Word**.

Best Practices for Resumes

Templates

Use to standardize your layout and/or which pieces of data are exported from Unanet CRM.

Tables

Apply a style to the table otherwise Word will apply the Table Grid style automatically and add grid lines to your generated document.

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.

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_Word_StandardMaster*.

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 Styles for all text within Word. If you chose not to create styles you may have issues with formatting after documents have been generated.

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

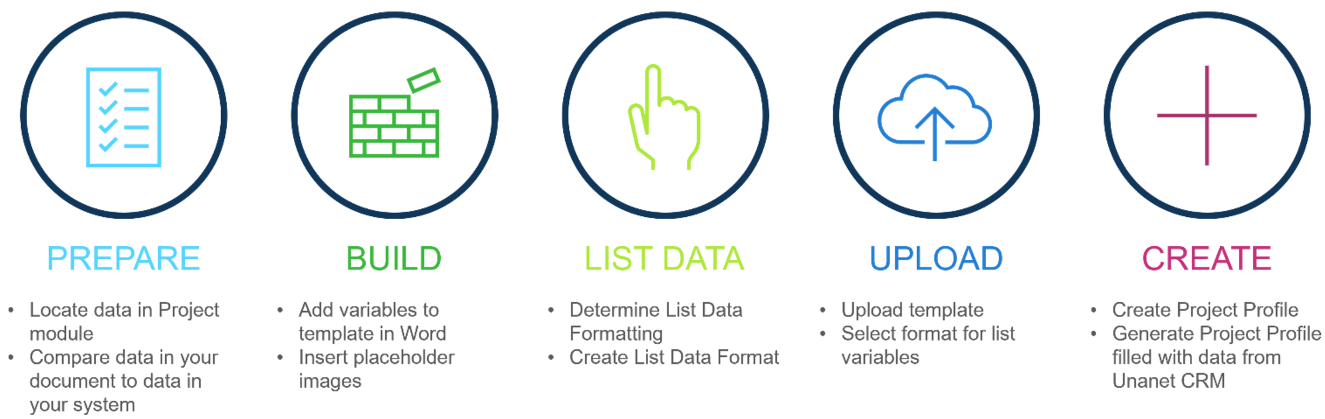
Learning Objectives

Explain how to create a Word 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.

Note: Set up and apply all styles and formatting to the Word document before adding placeholder images and variables.

Prepare to Create a Project Profile Template

Identify the fields of data that 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 Word Project Profile template. You also format any list data you have included in your template. You must save the Project Profile template with a file extension of .docx 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: Save the Project Profile Template

1. Open the **Standard_ProjectProfile.docx** file. **Note:** If necessary, select the **Show/Hide** icon on the **Home** tab to show the paragraph marks.
2. Select **File > Save a Copy**. The **Save a Copy** window opens.
3. Type *PP_3ImagesClientQuote_XX* in the **File name** field. **Note:** Replace **XX** with your initials.
4. Select **Word Document (*.docx)** from the **Save as type** dropdown.
5. Select the **Save** button.

Part 2: Put Placeholder Images in the Template

1. Right-click the **top** image.
2. Select **Change Picture > This Device**. The **Insert Picture** window opens.
3. Select the **Placeholder_Image_3.jpg** image.
4. Select the **Insert** button.
5. Repeat steps **6-9** for the **other two** images. **Note**: You must select a different placeholder image for each image.

Note: Place logos or images you do not want replaced by Publisher in the header or footer.

Part 3: Replace Field Names

1. Select the **Publisher 4.0** module.
2. Select **Template Administration > Project Profile**. The **Project Profile Administration** page opens.
3. Select the **Document Data Dictionary** link. The **Project Profile Data Dictionary** window opens.
4. Press **Ctrl+F**.
5. Type *projectdisplay* in the **Search** field.
6. Select **%ProjectDisplayName%** for **Published Project Name**.
7. Press **Ctrl+C**.
8. Return to **Word**.
9. Select the **Stadium Office/Data Center Complex** text to the paragraph mark.
10. Press **Ctrl+V**.
11. Repeat steps **1-8** 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%	Confidential
Start	%CalculatedStartMY%	August 2020
Completion	%CalculatedCompletionMY%	August 2022
Size	%ProjectSize%	100,000
Size	%ProjectSizeUnits%	SF
Delivery	%ProjectDeliveryMethod%	Design-Build

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

Part 4: Include a Section Break and Unlink Header and Footer from the Previous
These steps are necessary to batch documents together using the Publisher tool allowing each template's header and footer to be applied.

1. Place the **cursor** after the table.
2. Select the **Layout** tab.
3. Select **Breaks > Section Breaks > Next Page**.
4. Double-click **Header – Section 2**.
5. Select the **Link to Previous** button to unlink the header from the previous header.
6. Select the **Go to Footer** button.
7. Select the **Link to Previous** button to unlink the footer from the previous footer.
8. Select the **Save** button.
9. Close the **Project Profile** template. **Note**: You must close your **Word** template before uploading it to **Publisher 4.0**.

Upload a Project Profile Template

Now that you have created your Project Profile template, included placeholder images and placed variables, and saved it as a .docx, you can upload your template to Publisher 4.0. **Note**: You must close the template before uploading it 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. When you save over the existing template, Unanet CRM updates any document using this template automatically.

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

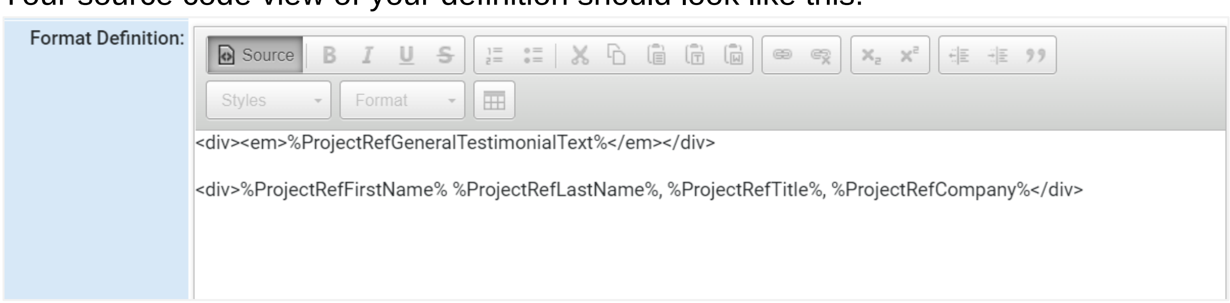
In this activity, you will create list data formatting and upload a Project Profile template to Publisher 4.0.

Activity Steps

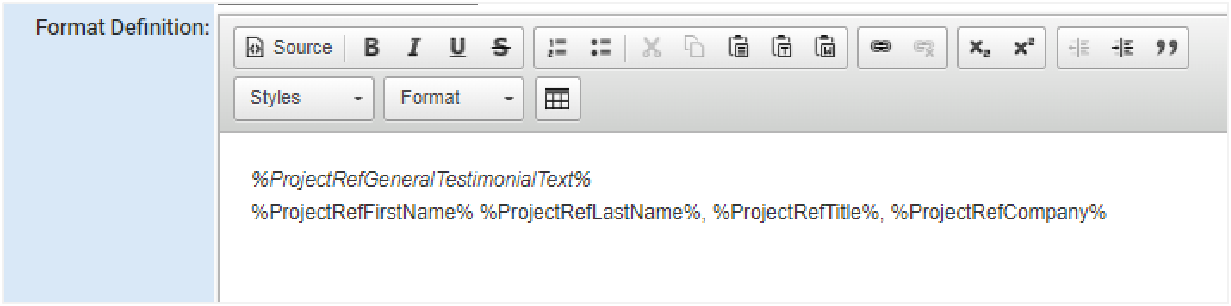
Part 1: Create List Data Formatting for Project References

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_Word_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 **%ProjectRefGeneralTestimonialText%**.
15. Select the **I** icon.
16. Place your **cursor** at the beginning of **%ProjectRefFirstName%**.
17. Press **Enter**.
18. Select the **Source** button.

    Your source code view of your definition should look like this:



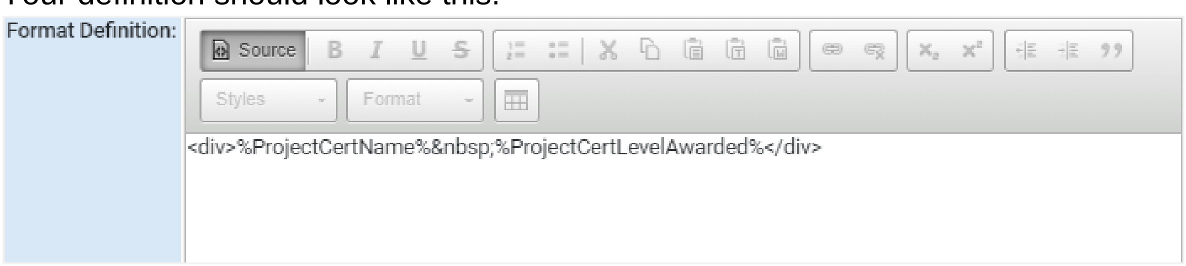
19. Select the **Source** button.
    Your definition should look like this:



20. Select the **Save** button.
21. 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_Word_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.docx** 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_Word_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_Word_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 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 **2022-0818** from the list of returned results for the **Project**.
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 **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 **glass-architecture-wallpaper.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	officespace.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 **.docx** link to download the **Project Profile**.
3. Select **Open** on the **Download** bar. The **Project Profile** opens in **Word**.

Best Practices for Project Profiles

Images

Use images which are completely unrelated to your business, if you are putting images in your template. Make the placeholder image the same size as you would like your Unanet CRM image.

Tables

Apply a style to the table otherwise Word will apply the Table Grid style automatically and add grid lines to your generated document.

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_Word_Standard2Images*.

Styles

Use Styles for all text within Word. If you chose not to create styles you may have issues with formatting after documents have been generated.

Check Your Understanding

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

a) Project record in Publisher 4.0
b) Header or footer
c) Publisher 4.0 replaces all images

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) Use a different image variable for each image
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 a Microsoft Word Project List with Unanet CRM data.

- Explain how to create a Microsoft Word 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 Word
- Insert placeholder 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 Word to create a Project List template. There are many helpful tutorials online. You should also know how to style your table and set row heights.

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. **Note:** Verify that Publisher is entered in the Keywords field in the Image Information for the image that will be used in the Project List.

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 Word Project List template. You must save the Project List template with a file extension of .docx 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.
Note: We built the Normal and Heading styles before placing the variable. You must apply a table style to your table and set border and row heights.

Activity Steps

Part 1: Save the Project List Template

1. Open the **Standard_ProjectList.docx** file. **Note:** If necessary, select the **Show/Hide** icon on the **Home** tab to show the paragraph marks.
2. Select **File > Save A Copy**. The **Save A Copy** window opens.
3. Type *Standard_ProjectList_XX* in the **File name** field. **Note:** Replace **XX** with your initials.
4. Select **Word Document (*.docx)** from the **Save as type** dropdown.
5. Select the **Save** button.

Part 2: Insert a Placeholder Image in the Template

1. Right-click the **first thumbnail** image.
2. Select **Change Picture > This Device**. The **Insert Picture** window opens.
3. Select an **image**.
4. Select the **Insert** button.

Note: Place logos or images you do not want replaced by Publisher in the header or footer.

Part 3: 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 **Word**.
9. Select the **Hubbard Broadcasting – Commercial Complex** text to the paragraph mark.
10. Press **Ctrl+V**.
11. 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%	Bruce Hagerty
Phone	%ProjectClientContactPhone%	(651) 642-4400
Email	%ProjectClientContactEmail%	bhagerty@hbi.com
Architect	%ProjectConsultantArchitect%	Abcam Architects
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.

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

Part 4: Adjust Row Height on Table

1. Select the table.
2. Select the **Layout** tab.
3. Select **Properties** in the **Table** section. The **Table Properties** window opens.
4. Select the **Row** tab.
5. Select the **Next Row** button.
6. Type *0.4* in the **Specify height** field.
7. Verify **Exactly** is selected for **Row height is**.
8. Select the **OK** button.
9. Select the **Save** button.

Part 5: Include a Section Break and Unlink Header and Footer From the Previous

These steps are necessary to batch documents together using the Publisher tool allowing each template's header and footer to be applied.

1. Place the **cursor** after the table.
2. Select the **Layout** tab.
3. Select **Breaks > Section Breaks > Next Page**.
4. Double-click the **next section's** header.
5. Select the **Link to Previous** button to unlink the header from the previous header.
6. Select the **Go to Footer** button.
7. Select the **Link to Previous** button to unlink the footer from the previous footer.
8. Select the **Save** button.

10. Close the **Project List** template. **Note**: You must close your **Word** template before uploading it to **Publisher 4.0**.

Upload a Project List Template

Now that you have created your Project List template with a table, placeholder image, and variables, then saved it as a .docx; 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 Lists 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 Certifications. 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

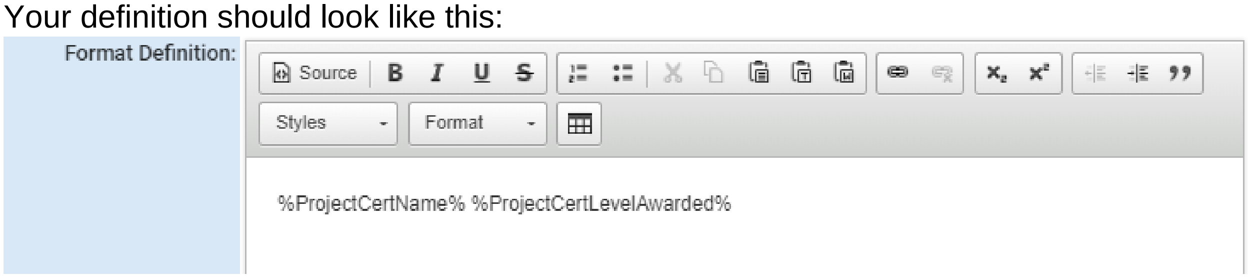
In this activity, you will create list data formatting and upload a Project List template to Publisher 4.0.

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**.

    Your definition should look like this:



14. Select the **Save** button.
15. 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.docx** 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 CRM 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. **Note**: The report sort order determines the project order.
4. Select the **Save** button.

Part 6: Generate a Project List

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

Best Practices for Project Lists

Tables

Apply a style to the table otherwise Word will apply the Table Grid style automatically and add grid lines to your generated document.

Project List Naming Conventions

Include the project category and template name when naming a project list record. For example, *HealthcareProjects_CL5Y*.

Project Reports

Use days rather than months or years when naming a project report that uses date parameters. For example, *Previous1825Days*.

Styles

Use Styles for all text within Word. If you chose not to create styles you may have issues with formatting after documents have been generated.

Check Your Understanding

Which 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) Include a placeholder 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 a Microsoft Word Knowledge Document with Unanet CRM data.

- Explain how to create a Microsoft Word Knowledge template.
- Recall how to upload a Microsoft Word Knowledge template to Unanet CRM.
- Explain how to create and generate a Microsoft Word 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.

PREPARE

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

BUILD

- Add variables to template in Word
- Insert placeholder images

UPLOAD

- Upload template

CREATE

- Create Knowledge document
- Generate Knowledge document 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 template.

Note: Set up and apply all styles and formatting to the Word document before adding placeholder images and variables.

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. **Note:** You can place the formatted text in the Knowledge Bit – Description, and Word honors the formatting.

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 Word Knowledge template. You must save the Knowledge template with a file extension of .docx and close the document to upload the file to Unanet CRM.

Activity 5.2 – Building a Knowledge Template

In this activity, you will create a Knowledge template.

Activity Steps

Part 1: Save the Knowledge Template

1. Open the **Standard_KnowledgeTemplate.docx** file. **Note:** If necessary, select the **Show/Hide** icon on the **Home** tab to show the paragraph marks.
2. Select **File > Save a Copy**. The **Save a Copy** window opens.
3. Type *Standard_KP_WImage_XX* in the **File name** field. **Note:** Replace **XX** with your initials.
4. Select **Word Document (*.docx)** from the **Save as type** dropdown.
5. Select the **Save** button.

Part 2: Replace Field Names

1. Select the **Publisher 4.0** module.
2. Select **Template Administration > Knowledge Profile**. The **Knowledge Profile Administration** page opens.
3. Select the **Document Data Dictionary** link. The **Knowledge Profile Data Dictionary** window opens.
4. Select **%kpTitle%** for the **Knowledge Bit - Title**.
5. Press **Ctrl+C**.

6. Return to **Word**.
7. Select **Knowledge Profile** in the header on the first page.
8. Press **Ctrl+V**.
9. Return to the **Knowledge Profile Data Dictionary** window.
10. Select **%kpDescription%** for the **Knowledge Bit – Description**.
11. Press **Ctrl+C**.
12. Return to **Word**.
13. Select the **text** in the body of the document.
14. Press **Ctrl+V**.
15. Select **%kpDescription%** in the **Word** document.
16. Select the **Normal** tile in the **Styles** section.
17. Close the **Knowledge Profile Data Dictionary** window.

Part 3: Insert a Placeholder Image

1. Right-click the **placeholder image**.
2. Select **Change Picture > This Device**. The **Insert Image** window opens.
3. Select an **image**.
4. Select the **Insert** button.

Note: Do not anchor an image on the same line as a variable—anchor images in a position where populated data cannot replace it.

Part 4: Include a Section Break and Unlink Header and Footer From the Previous

These steps are necessary to batch documents together using the Publisher tool allowing each template's header and footer to be applied.

1. Place the **cursor** after the table.
2. Press **Enter**.
3. Press **Enter** again.
4. Select the **Layout** tab.
5. Select **Breaks > Section Breaks > Next Page**.
6. Select **Section Break (Next Page)**.
7. Select the **Home** tab.
8. Select the **Normal** tile in the **Styles** section.
9. Double-click the **next section's** header.
10. Select the **Link to Previous** button to unlink the header from the previous header.
11. Select the **Go to Footer** button.
12. Select the **Link to Previous** button to unlink the footer from the previous footer.
13. Select the **Save** button.
14. Close the **Knowledge** template. **Note**: You must close your **Word** template before uploading it to **Publisher 4.0**.

Upload a Knowledge Template

Now that you have created your Knowledge template with placeholder images and variables and saved it as a .docx, you can 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. When you save over an existing template, CRM updates any Knowledge document using that template.

Activity 5.3 – Uploading a Knowledge Template

In this activity, you will upload a Knowledge template from Word 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_WImage_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_WImage_XX.docx** 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 *GuaranteedMaximumPriceWImage_XX* in the **Knowledge Profile Name** field.
4. Type *Guaranteed* in the **Knowledge** field.
5. Select **Guaranteed Maximum Price (GMP)** from the list of returned results.
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 **Standard_WImage_XX** radio button.
3. Select the **Save** button. A warning message displays.
4. Select the **OK** button.

Part 3: Select the Image

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.
   Note: The **Selected Document** functionality is for future development. Currently, attaching a document to a **Word Knowledge Profile** results in an error.

Part 4: Generate a Knowledge Document

1. Select the **Generate Document** button.
2. Select the **docx** link to download the **Knowledge** document.
3. Select **Open** on the **Download** bar. The **Knowledge** document opens in **Word**.

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

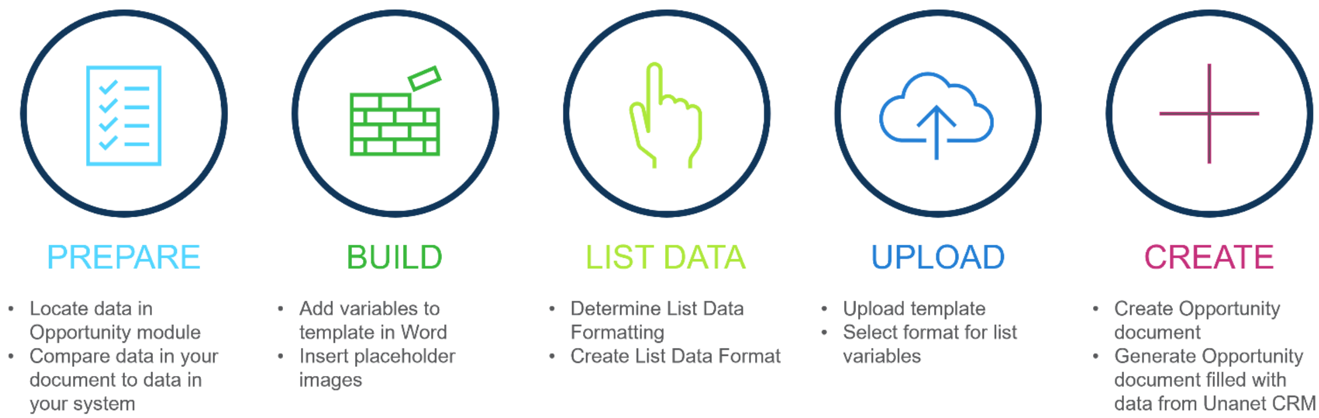
Learning Objectives

Explain how to create a Word 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 Word 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.

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.

Note: Set up and apply all styles and formatting to the Word document before adding placeholder images and variables.

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. **Note:** You can place the formatted text in the Description field, and Word honors the formatting.

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 Word Opportunity Profile template. You must save the Opportunity Profile template with a file extension of .docx to upload the file to Unanet CRM.

Activity 6.2 – Building an Opportunity Template

In this activity, you will create an Opportunity template.

Activity Steps

Part 1: Save the Opportunity Template

1. Open the **Standard_LetterProposal.docx** file. **Note:** If necessary, select the **Show/Hide** icon on the **Home** tab to show the paragraph marks.
2. Select **File > Save a Copy**. The **Save As** window opens.
3. Type *PlanReviewSvcs_Proposal_XX* in the **File name** field. **Note:** Replace **XX** with your initials.
4. Select **Word Document (*docx)** from the **Save as type** dropdown.
5. Select the **Save** button.

Part 2: Replace Field Names

1. Select the **Publisher 4.0** module.

2. Select **Template Administration > Opportunity Profile**. The **Opportunity Profile Administration** page opens.
3. Select the **Document Data Dictionary** link. The **Opportunity Profile Data Dictionary** window opens.
4. Press **Ctrl+F**.
5. Type *due* in the **Search** field.
6. Select **%OppProposalDueDate%** for the **Proposal Due Date**.
7. Press **Ctrl+C**.
8. Return to **Word**.
9. Select the **11/30/2023** text up to the hidden character.
10. Press **Ctrl+V**.
11. Repeat steps **5-10** to replace data with **Field Name** variables.

Search	Field Name	Template
Contactrole	%OppContactRoleClientContact%	Donald Doorman
Contactrole	%OppContactRoleClientContactTitle%	Purchasing Director
Clientname	%OppClientName%	Blue Lake Facility
Address	%OppClientAddress1%	6957 County Road 101 E
Address	%OppClientAddress2%	Suite 100
City	%OppClientCity%	Austin
State	%OppClientStateAbbrev%	TX
Zipcode	%OppClientZipcode%	78741
Name	%OppName%	Blue Lake Office/Data Center Plan Review Services
Oppcontact	%OppContactRoleClientContactFirstName%	Donald
Description	%OppDescription%	Background and Scope of Services text
Fee	%OppFirmEstimatedFee%	85,000
Staff Team	%OppStaffTeamProjectEngineer%	Joseph Engineer
Staff Team	%OppStaffTeamProjectEngineerTitle%	Engineer II
StartDate	%OppEstimatedStartDateMY%	12/13/2023
Leadbus	%OppStaffTeamLeadBusinessDeveloperOfficePhone%	(800) 505-7489
Leadbus	%OppStaffTeamLeadBusinessDeveloperOfficeEmail%	NKegger@UnanetAEC.com
Leadbus	%OppStaffTeamLeadBusinessDeveloper%	Nolan Kegger
Leadbus	%OppStaffTeamLeadBusinessDeveloperTitle%	Principal in Charge

12. Press **Ctrl+F**. The **Navigation** panel opens.
13. Select the **dropdown** arrow > **Advanced Find**. The **Find and Replace** window opens.
14. Select the **Replace** tab.
15. Type *Blue Lake Facility* in the **Find what** field.

16. Type *%OppClientName%* in the **Replace with** field.
17. Select the **Replace All** button. A message displays.
18. Select the **OK** button.
19. Select the **Close** button.

Part 3: Include a Section Break and Unlink Header and Footer From the Previous
These steps are necessary to batch documents together using the Publisher tool allowing each template's header and footer to be applied.

1. Place the **cursor** after the table.
2. Select the **Layout** tab.
3. Select **Breaks > Section Breaks > Next Page**.
4. Double-click the **next section's** header.
5. Select the **Link to Previous** button to unlink the header from the previous header.
6. Select the **Go to Footer** button.
7. Select the **Link to Previous** button to unlink the footer from the previous footer.
8. Select the **Save** button.
9. Close the **Opportunity Profile** template. **Note**: You must close your **Word** template before uploading it to **Publisher 4.0**.
10. Close the **Opportunity Profile Data Dictionary** window.

Upload an Opportunity Profile Template

Now that you have created your Opportunity Profile template, including placed variables, and saved it as an .docx, 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. You are saving over the existing template, and this action updates the Opportunity Profile records 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 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.docx** 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 *Blue Lake Office/Data Center Plan Review Services_XX* in the **Opportunity Profile Name** field.
4. Type *Blue Lake* in the **Opportunity** Search field.
5. Select **Blue Lake Office/Data Center Plan Review Services** from the list of returned results.
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 **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 **docx** link to download the **Opportunity** document.
3. Select **Open** on the **Download** bar. The **Opportunity** document opens in **Word**.
4. Press **Ctrl+F**. The **Navigation** pane opens.
5. Type *%* in the **Search** field. There are no results. This indicates that Publisher populated all the variables with data.

Part 4: Review the Opportunity Record

1. Return to **Publisher 4.0**.
2. Right-click the **Blue Lake Office/Data Center Plan Review Services (18-2801)** link.
3. Select **Open link in a new tab**.
4. Select the new **Unanet CRM** tab.
5. Select **More > Documents**.
6. Select the **Associated Opportunity Profiles** tab. Here you can view associated Opportunity Profile templates and generate documents.

Check Your Understanding

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

a) .dot
b) .docx
c) .docm

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 a Microsoft Word Batch Job.

- Explain how to create and edit a batch job.

Introduction

Publisher 4.0 can batch-generate several different documents and document types into one .docx file.

Note: The templates built during this course are already batch-ready because you included the Section Break > Next Page at the end of each. In the future, if your templates do not have the next-page section breaks, you must add one at the end of each template. Please refer to the steps found on page 60.

Batch Jobs Tab

The Batch Jobs tab includes the Batch Job grid.

Batch Job Grid

The Batch Job grid has the following functionality:

- **New Batch Job:** Select to open the New Job window.
- **Filter by Project*:*** Future development.
- **Filter by Opportunity:** Future development.

Columns

The Batch Job grid includes the following columns that you can sort by, group by, rearrange, remove, or add:

- **Run/Edit Job:** Select the dropdown arrow to Run Job, Cancel Job, Edit Job, or Delete Job.
- **Job Name:** Displays the name of the batch job.
- **Template Type:** Displays the template type; Word or InDesign.
- **Created By:** Displays the user who created the batch job.
- **Contents:** Displays which documents the batch job includes.
- **Opportunities:** Future development.
- **Status:** Displays the status of the batch job; Not Started, Pending, or Complete.

Progress Section

The Progress Section panel includes the following information:

- **Progress bar:** Displays the progress of the selected batch job.
- **Job build time:** Displays how long it takes to complete the batch job.

- **Download Merged Documents:** Appears after the Publisher completes the batch job.
- **Columns**
  - **Document order**: Displays the order Publisher generates documents.
  - **Document Name**: Click the link to the individual document build page.
  - **Data Source**: Displays Personnel or Projects.
  - **Status**: Includes clickable links to download individual documents.

Demo 7.1 – 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 in the document grid or from the Batch Jobs tab.

Activity 7.2 – 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:
   - **Blue Lake Office/Data Plan Review Servicess_XX**
   - **GuaranteedMaximumPriceWImage_XX**
   - **Office/DataCenter_5yearsCommercial_XX**
   - **StadiumOfficeComplex_3Images1Quote_XX**
   - **AlexHoffman_OfficeDataCenter_Headshot_XX**
3. Select the **New Batch Job** button. The **New Job** window opens.
4. Type *Blue Lake_Plan_Review_XX* in the **Job Name** field.
5. Select **Word** for the **Template Type**.
6. Select **docx** for the **Output Format**.
7. Select the **Merge** check box. **Note**: If you select the **Zip** check box, Unanet CRM generates your batch job and exports them as individual documents in a zipped folder.
8. Select the **Knowledge Template** 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 **Blue Lake_Plan_Review_XX** in the list. The document publishing details are displayed 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 **Word**.
7. Scroll through the pages of the document.
8. Delete the hard return at the top of the Project List.
9. If necessary, delete any blank pages or extra paragraph marks.

Activity 7.3 – Editing a Batch Job

In this activity, you will edit a Batch Job.

Activity Steps

1. Return to **Publisher 4.0**.
2. Select the **Blue Lake 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 **Word**.

Best Practices for Batch Jobs

Batch Job Naming Conventions

Use a much detail as possible when naming a batch job. For example: *HealthcareSOQ_2018*.

Merge Files

Use Section Breaks within your Word templates to ensure each document keeps its correct formatting.

Check Your Understanding

Arrange the batching steps in the correct order when starting on the Document Grid.

Steps	Order
Select new batch job.	
Download and open the documents.	
Select the documents to include in the batch job.	
Select the Batch Job tab to view the progress.	
Save and run the batch job.	

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
You update WYSIWYG settings using Publisher 4.0.	F

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 insert your firm logo so that Publisher 4.0 does not replace it with a record image?

a) Project record in Publisher 4.0
b) Header or footer
c) Publisher 4.0 replaces all images

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) Use a different image variable for each image
c) Each template can only have one image

Lesson 4: Project Lists

Which 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) Include a placeholder 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 a Word template to Publisher 4.0?

a) .dot
b) .docx
c) .docm

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 batching steps in the correct order when starting on the Document Grid.

Steps	Order
Select new batch job.	2
Download and open the documents.	5
Select the documents to include in the batch job.	1
Select the Batch Job tab to view the progress.	4
Save and run the batch job.	3

COMPLETION CERTIFICATE AND EVALUATION

When the course has finished, Unanet University staff marks 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 generates a completion certificate (including **CPE credits**, where applicable) 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.