



Templates Guide

Updated 15 August 2023

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The Document Templates Concept

Using PowerPro RTO, training organisations can generate database sourced documents such as Parchments, Student letters, Invoices, Class rolls, Training plans, etc.

These documents are configured in MS Word and make use of training records fields such as:

- Client name
- Program name
- Course national code
- Unit of competency code
- Unit Start date
- Result/Outcome
- Date of Course completion

Different subsystems and areas of PowerPro use specific printing templates. These are fully customisable to suit your organisation's needs. The different kind of PowerPro Templates are:

- Certificates
- Transcripts of Results
- Statement of Attainments
- Unit Based State of Attainments (for short Courses)
- Certificates of Attendance (for non-accredited Courses)
- Course Roll
- Training Plans
- Invoices
- Receipts
- Client Cards
- Letters
- Emails
- SMS
- QR Card

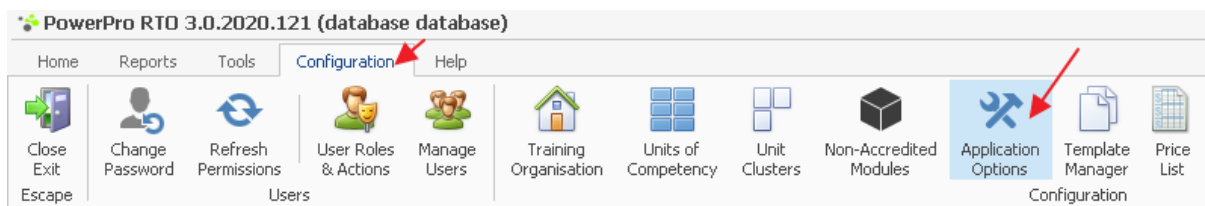
Templates Configuration / Settings

PowerPro “Templates” are usually stored in a folder structure accessible to the different PowerPro users. In some cases, such as using PowerPro Sky or when file sharing is not an option, it is best to use the Template manager (see specific Guide on this topic: Help>User Guides>Template Manager Guide).

Finding your Current Template Location

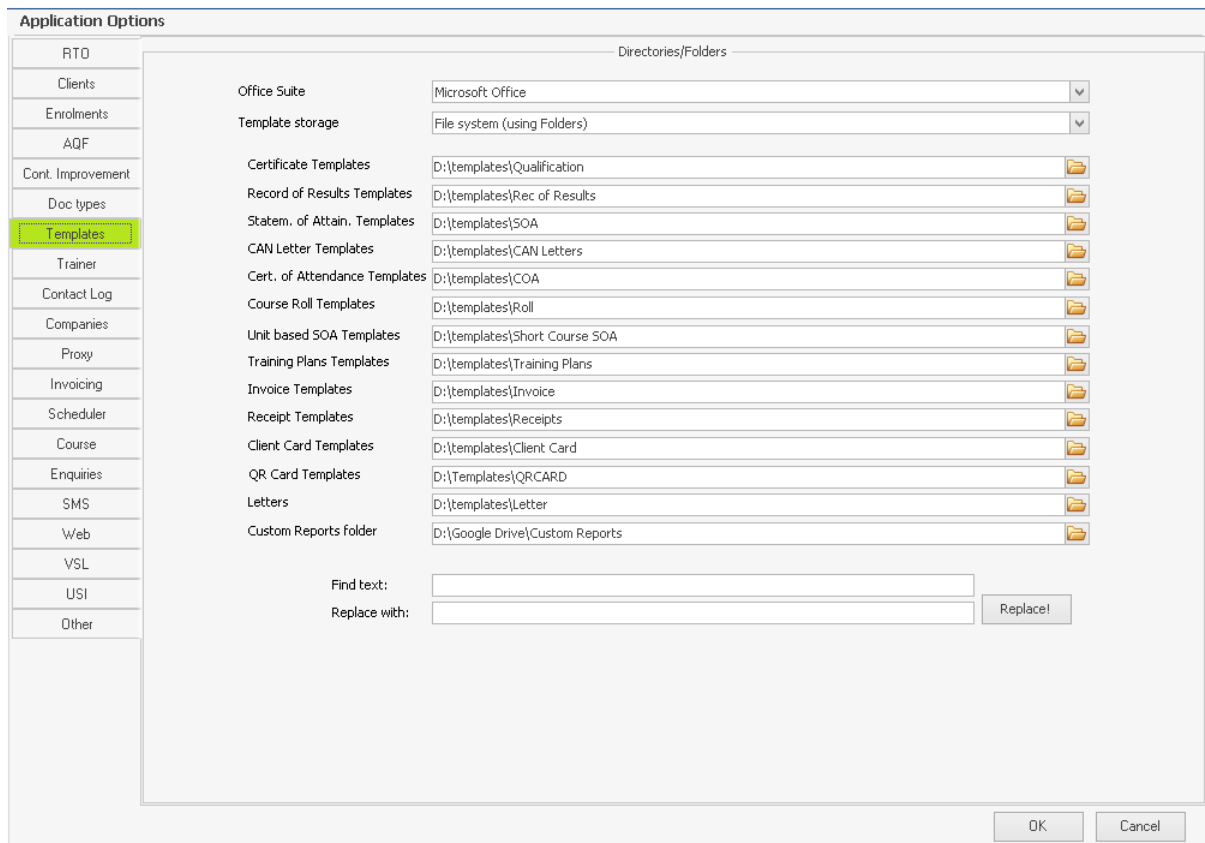
The different documents PowerPro can produce through its templates have their own subfolder within the templates folder. These individual folders hold a different data source including specific merge fields for that kind of document. For example, Invoice templates have invoicing related fields which are not meaningful to Qualification templates.

To find out where PowerPro currently looks for your templates, click on Configuration>Application Options>Templates:



■ Figure above – Opening the Application Options window

Once the Templates tab is open:

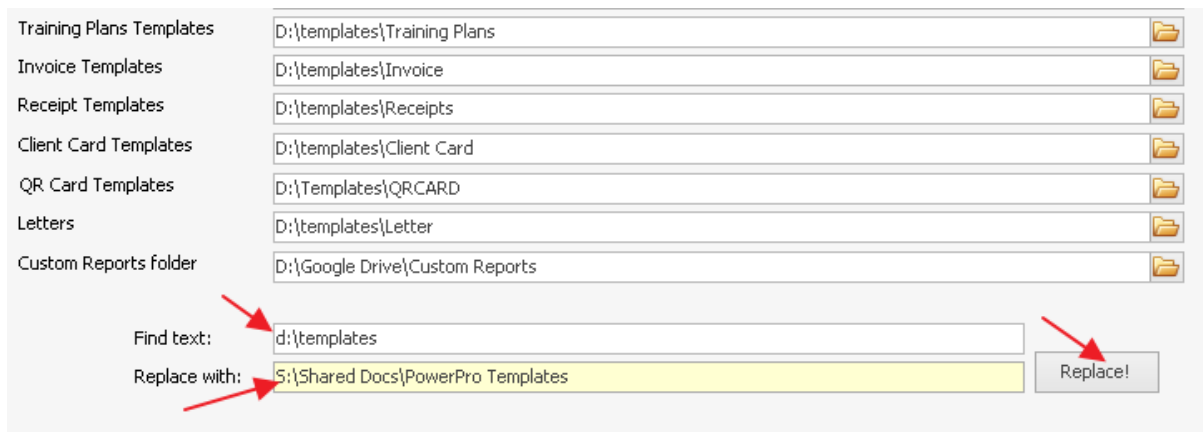


■ Figure above – PowerPro Templates Configuration screen

Moving your templates around

Situations may arise where your templates need to be moved to a different location. If this occurs, please ensure the above window fields are updated to reflect the new location of the templates. Also ensure all PowerPro users have access to the new Template folders.

Use the folder icon for each individual template folder (located to the right of the file path to update the location of a template type. Alternatively, the "Find Text" & "Replace with" fields can be used to update across multiple template types (as shown below).

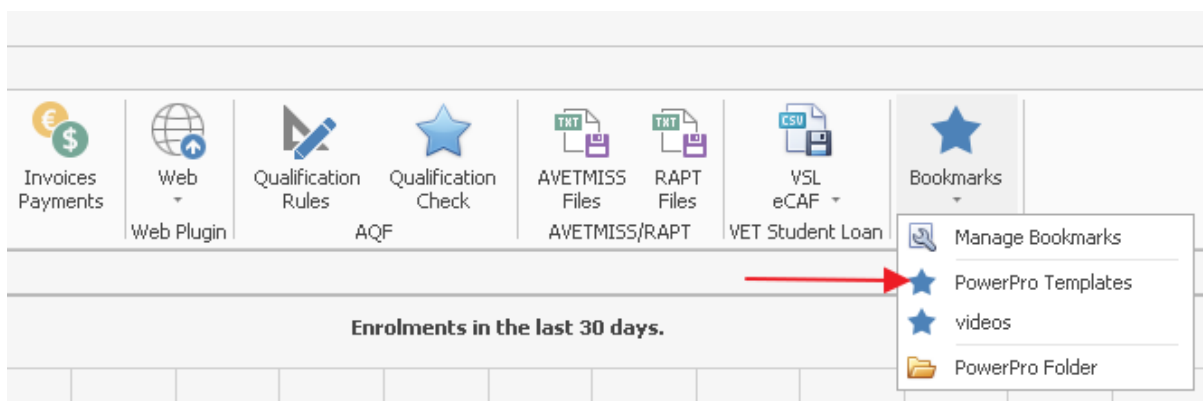


■ Figure above – Updating your Template Configuration in PowerPro

NOTE: The PowerPro Template location is a system-wide setting. Once set it applies to all users. Users logged on to PowerPro will have to log back on to “feel” these changes

Bookmarking the Templates folder

Just like your Internet browser bookmarks, PowerPro bookmarks is a list of shortcuts to your most used folders and web pages. Unless you are using the Template Manager (PowerPro Sky), we strongly recommend having a bookmark set up for the Templates folder.



■ Figure above – The Templates Bookmark

To create or modify a bookmark, click on the "Manage Bookmarks" menu item (shown in image above). This allows you to configure the list of Bookmark by entering a Caption and an address. The address can either be the path to a folder (such as the Templates) or a URL to a Website or to a web page.

Link Caption	Link Address
E-Learning - LMS	https://myelearning.com.au/login
PowerPro Templates	D:\templates
videos	http://powerprto.com.au/how_to_videos/

■ Figure above – Configuring your Bookmarks.

NOTE: The PowerPro Bookmarks configuration is a system-wide setting. Once set it applies to all users. Users logged on to PowerPro will have to log back on to “feel” these changes.

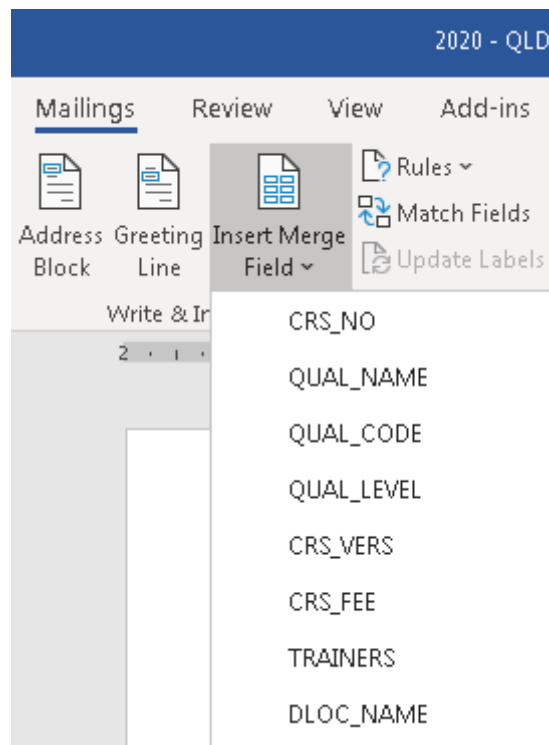
Customising your Templates

Since the document templates are MS Word documents, you should use MS Word to:

- Adjust the document layout, formatting, logos and styles to comply with your organisation's style guide.
- Insert or remove PowerPro database fields using the Mail Merge Word functions

Linking the Template to its Data Source

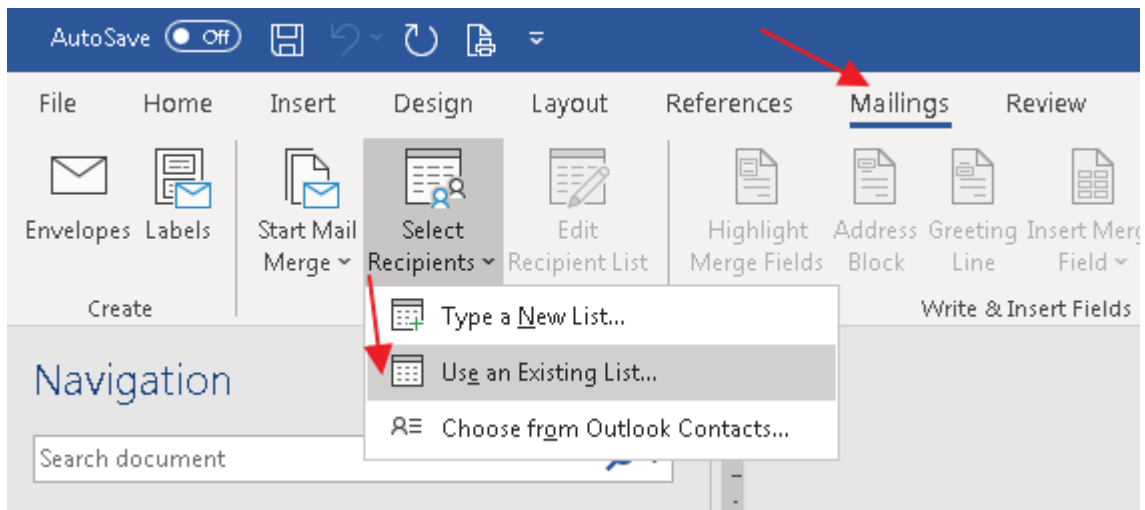
In order to list the PowerPro database field list, each template document must be "linked" to a Data Source. Once this link is established you have access to the drop down containing the PowerPro database field specific to that template type:



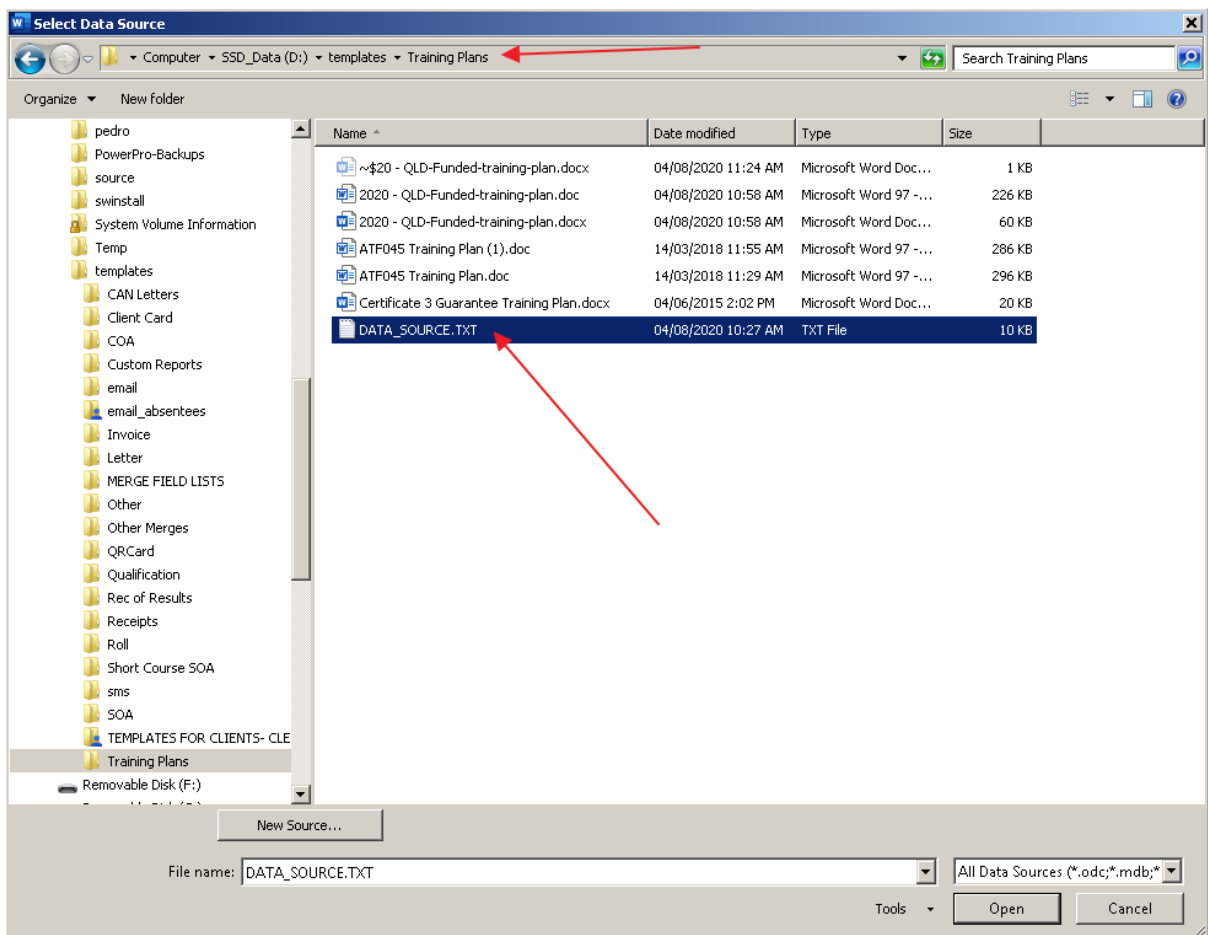
■ Figure above – The PowerPro Mail Merge fields

If the above menu is greyed out it means the template document is not linked to a data source. To link the template to the data source, follow these steps:

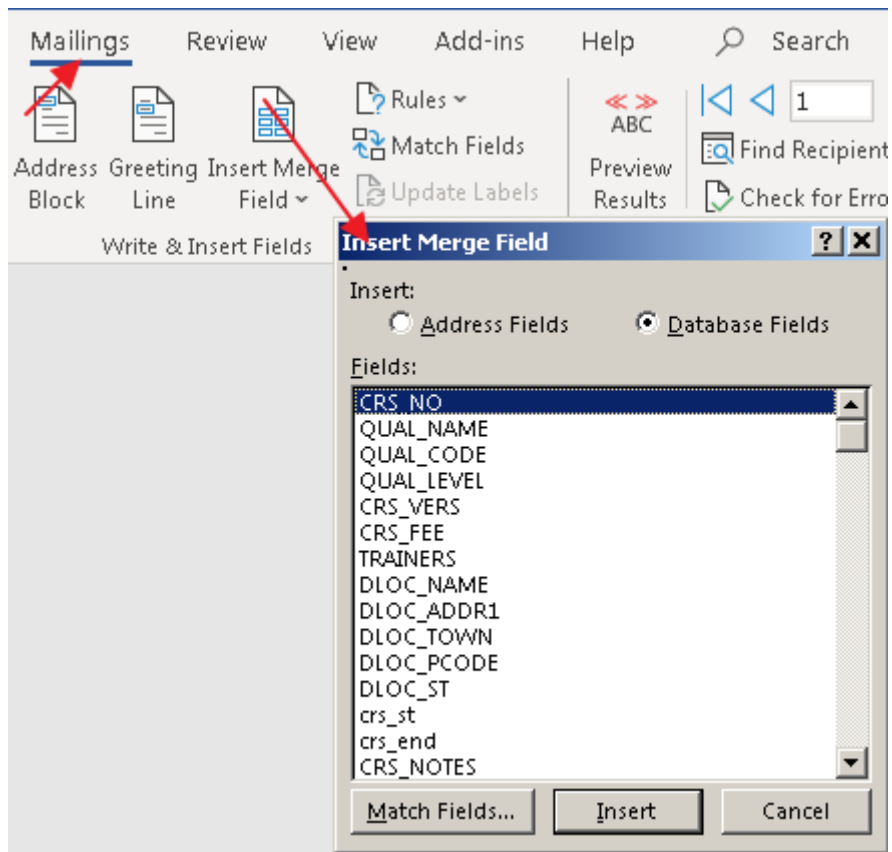
- 1) Open the Template document in MS Word
- 2) Click on Mailings>Select Recipients>Use existing list as per image below:



- 3) When prompted for the Data Source, browse to the folder where the template document is and choose the DATA_SOURCE.txt file as per image below:



- 4) Press Open and your template document is now linked to the data Source.
- 5) The MS Word Mailings>Insert Merge Field should now contain the PowerPro fields required for your template:



Which Mail Merge Fields are Available?

Different template types require different fields to be used. A Template fields dictionary listing all field names and their meaning for the different templates is available here:

<https://powerprorto.com.au/tms/gh/MERGEFIELDLIST.pdf>

Frequently Asked Questions

A section dedicated to the PowerPro templates is available in our Frequently Asked Questions web site: <https://www.powerprorto.com.au/faq/index.php?action=show&cat=14>