



Template Manager Guide

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Support Number: (08) 9511 1040

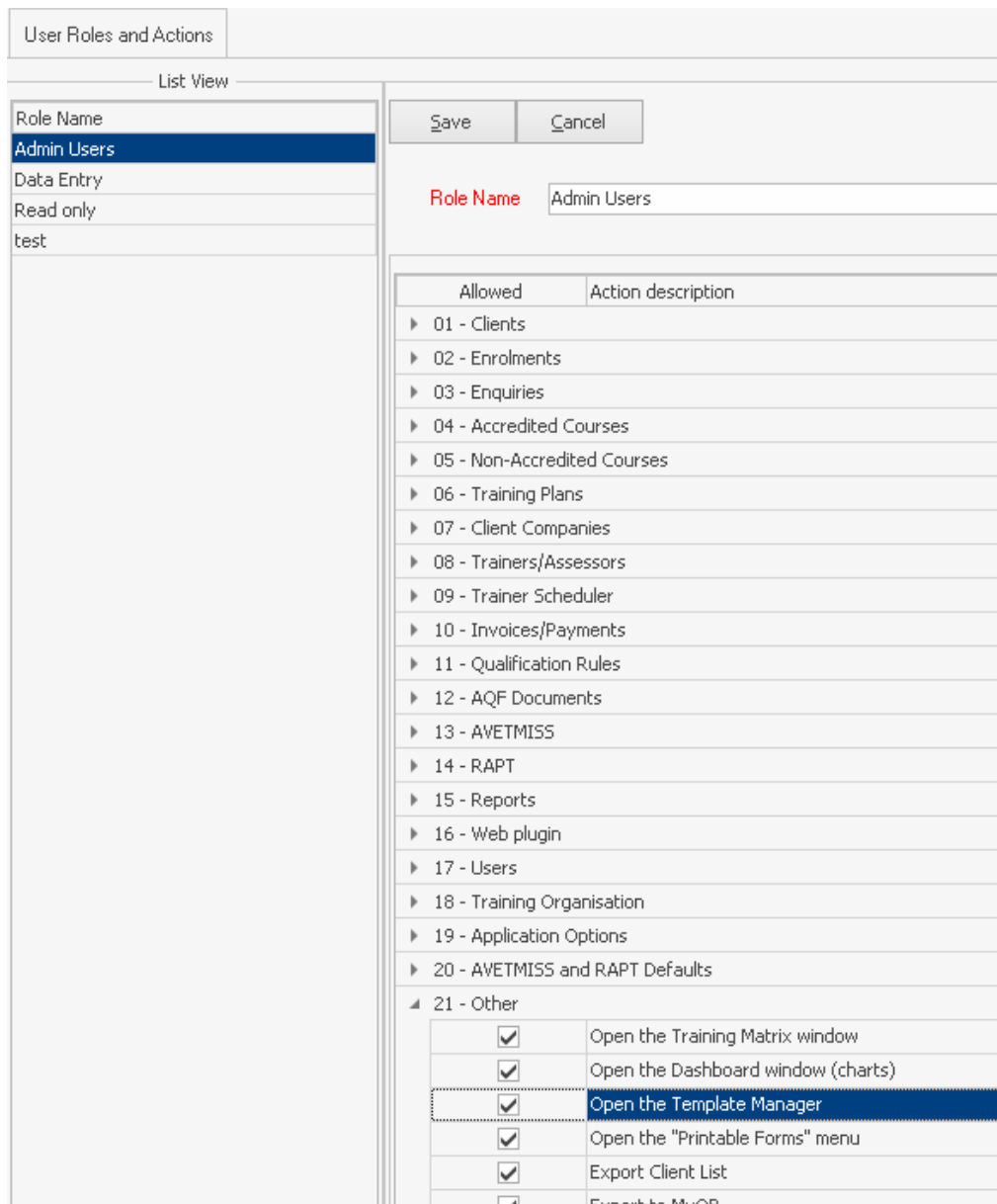
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The Template Manager

The template Manager allows PowerPro to use document templates storing within the actual database as opposed to storing these on the file system (folders). The main advantages are that it can be shared across different locations (offices, branches) that do not have access to the same folders

How the Template Manager works

To access the Template Manager users must be granted the corresponding action:



The screenshot shows the 'User Roles and Actions' configuration window. The 'Admin Users' role is selected. The 'Allowed' column for the '21 - Other' category is checked, and the 'Open the Template Manager' action is highlighted.

Allowed	Action description
▶	01 - Clients
▶	02 - Enrolments
▶	03 - Enquiries
▶	04 - Accredited Courses
▶	05 - Non-Accredited Courses
▶	06 - Training Plans
▶	07 - Client Companies
▶	08 - Trainers/Assessors
▶	09 - Trainer Scheduler
▶	10 - Invoices/Payments
▶	11 - Qualification Rules
▶	12 - AQF Documents
▶	13 - AVETMISS
▶	14 - RAPT
▶	15 - Reports
▶	16 - Web plugin
▶	17 - Users
▶	18 - Training Organisation
▶	19 - Application Options
▶	20 - AVETMISS and RAPT Defaults
▲	21 - Other
<input checked="" type="checkbox"/>	Open the Training Matrix window
<input checked="" type="checkbox"/>	Open the Dashboard window (charts)
<input checked="" type="checkbox"/>	Open the Template Manager
<input checked="" type="checkbox"/>	Open the "Printable Forms" menu
<input checked="" type="checkbox"/>	Export Client List
<input checked="" type="checkbox"/>	Export to MyOR

The TM is accessible from the Configuration menu. It has multiple tabs (vertically left side of the TM window), one for each template document type. Users should select the appropriate tab before carrying out any Template actions.

Template Manager		
Invoice Templates		
Qualification	Document Name	Document Description
Record of Results	FSWA Invoice Corporate with Division.	
Statement of Attainment	FSWA Invoice Corporate.docx	
Certificate of Attendance	FSWA Invoice.docx	
Class Roll	Invoice with payment link.docx	
Short Course SOA	Sample Invoice.docx	Simple invoice template layout
Training Plan		
Invoice		
Receipt		
Client Card		
QR Card		
Mail Merge Clients		
CAN Letters		
AUS Key		

How to import a template into the TM?

To import templates into the TM users can either by drag & dropping them or by using the Actions>Import New Template.

The template is now ready to be used in PowerPro.

How to edit (modify) a TM template?

To modify a template from the TM, users should:

1. use Actions>Check out Template (for editing), this copies the template document to the Public Documents\PowerPro-Editing and open the document for the user to edit. At this point the TM shows the Template has been checked out for editing.
2. Once the document editing is complete and the Word Document has been saved, the user can either drag and drop the document back in to the TM or use the Actions>Check in Template (editing completed). This will delete update the TM Template with the edited version and (try to) delete the Template document from the Public Documents\PowerPro-Editing folder. The template is now ready to be used in PowerPro.

NOTE: While a template is being edited it can still be used in PowerPro to generate

What does the Cancel editing option do?

This option is used to clear the TM Template editing flag. This allows users to check the Template out for editing again.

Can I recover a Deleted Template?

Yes, if the template was in the TM and has been deleted using Actions>Delete Template.

To recover a deleted Template do as follows:

1. Click on Actions>Show deleted Templates (this will list the deleted template)
2. Right-click on the deleted template and choose the Restore Template option.

Technical

Template size limit

There is a template size limit to encourage users optimizing their template documents (e.g. drop image resolution). This limit is set to 2MB by default. It can be adjusted if required, please contact Vidatek should you require a different file size limit.