Chapter 8

Office Integration

IN THIS CHAPTER

- Office Integration Setup
- Working in Word to create a Document Template
- Working in Excel to create a Document Template
- Import / Export Document Templates

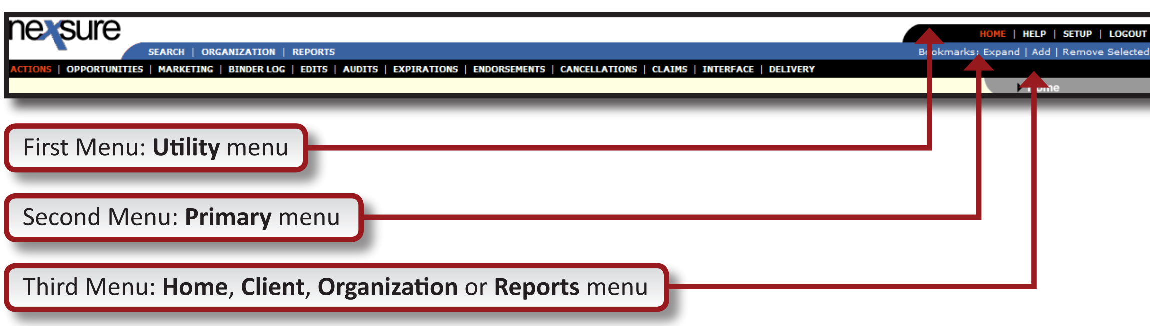
Office Integration Setup

WHAT Document Templates are

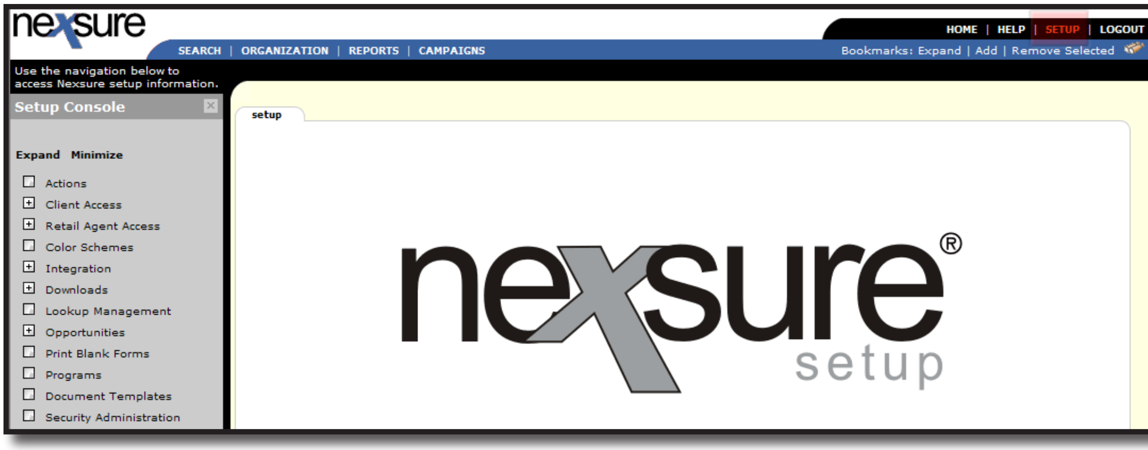
Document templates are either Microsoft® Word® or Excel® documents created by each organization to help speed up work processes and provide a way to implement document consistency and branding. Merge fields may be placed in the document from the standard forms using the easily accessible XML tree. When these templates are added at client/policy level the merge fields placed in the template are replaced with data from these policy forms.

WHERE to Go to Add Document Templates

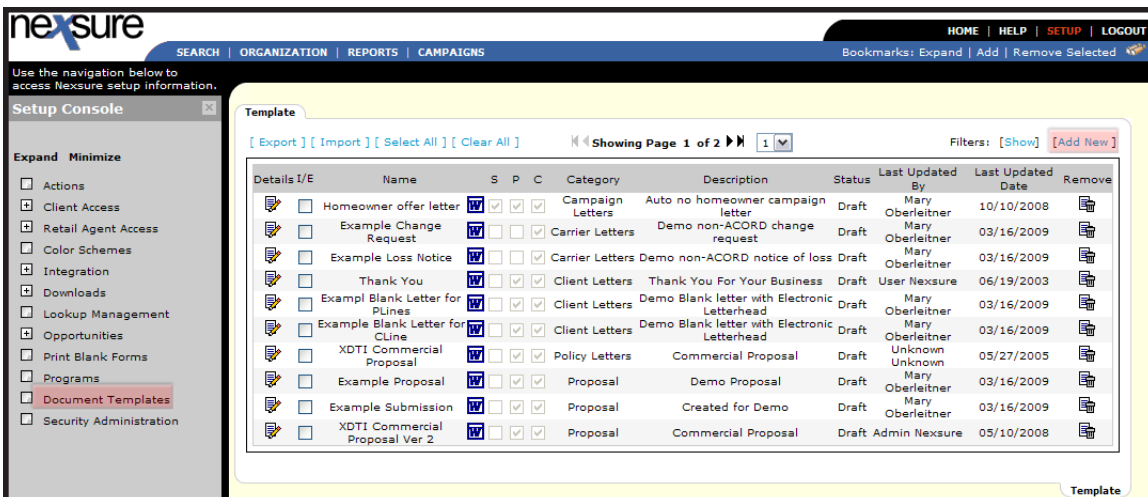
On the Utility menu, click the **SETUP** link.



The Setup Console displays defaulting to Actions summary.

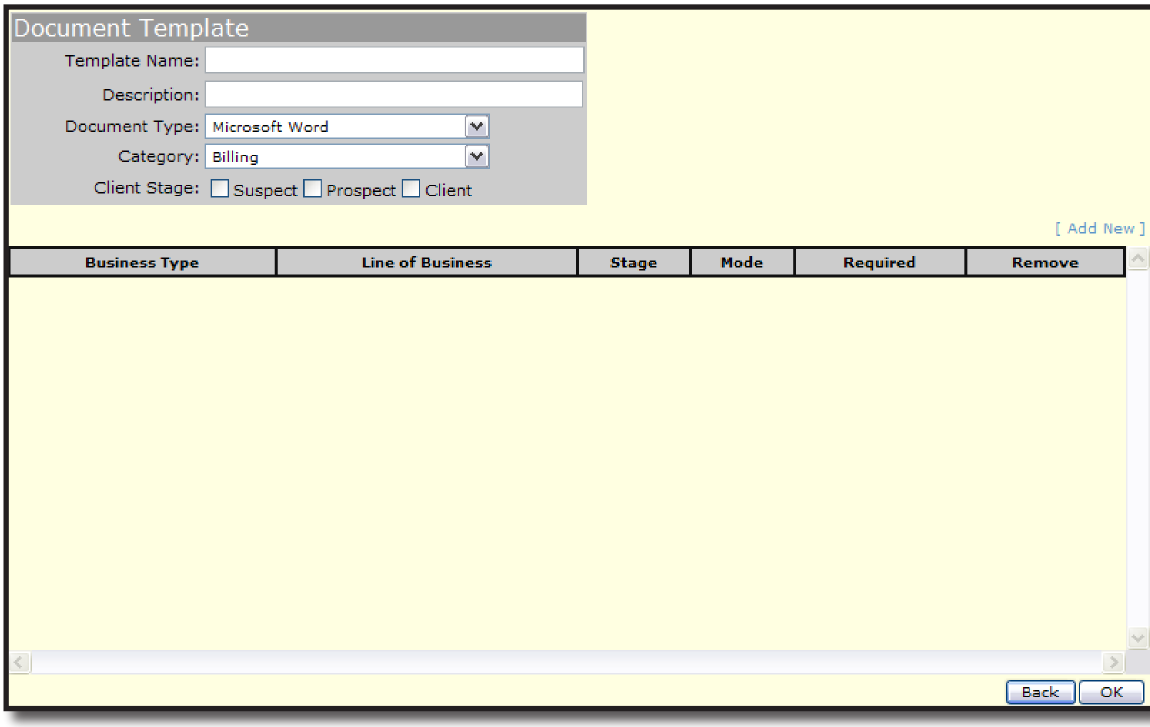


On the Setup Console, click the **Document Templates** link to display the Document Templates summary.

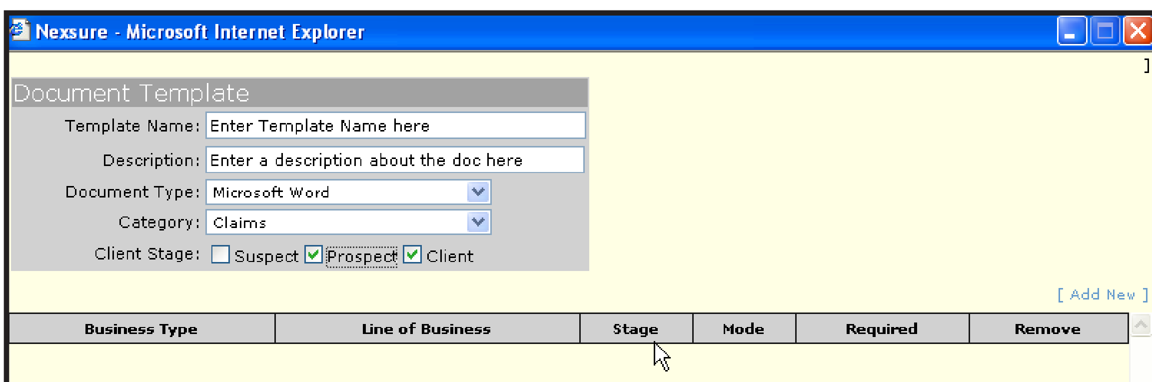


HOW to Add Document Templates

Click on the **[Add New]** link located in the upper right corner of the screen to display the Document Template setup page.

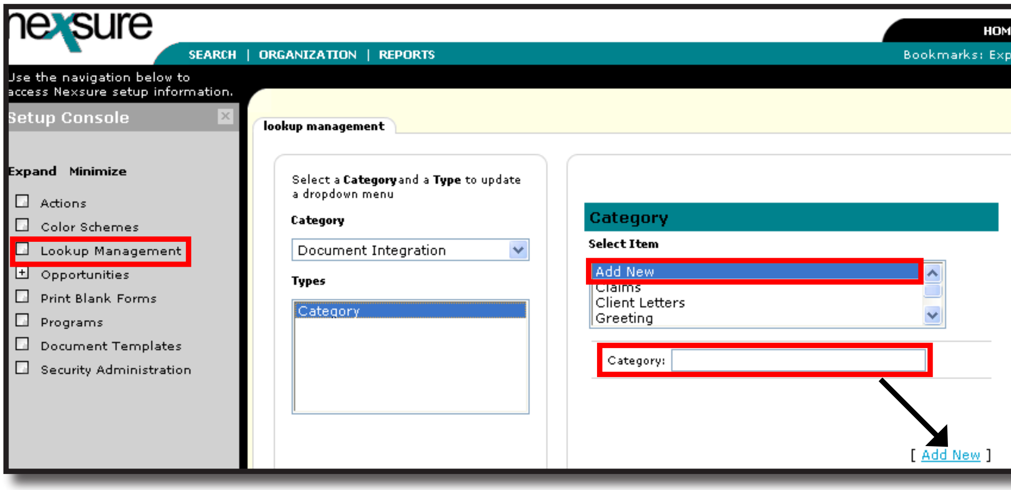


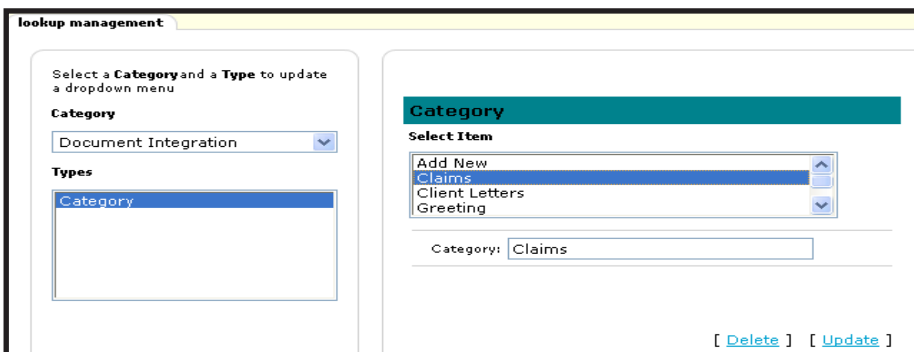
Enter a brief name of the type of document that is being added so it can be easily recognized from client/policy level. The description should describe briefly what the document is to be used for. After the document has been created the template name and description may be modified if necessary.



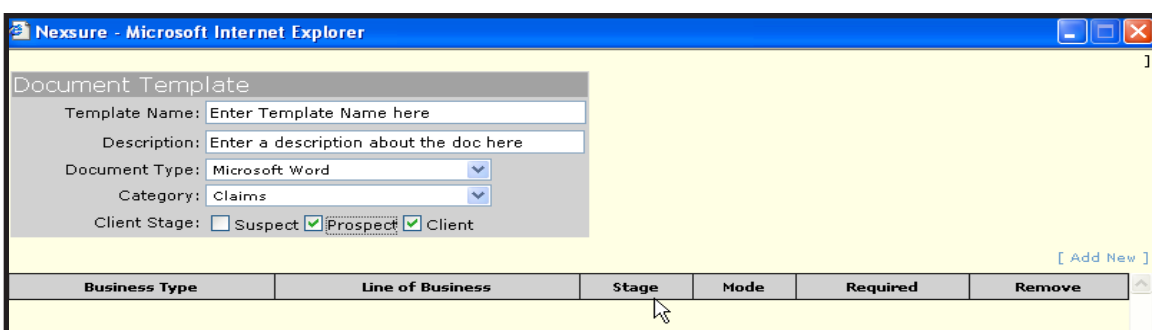
The Document type includes two choices, Microsoft Word and Excel. Depending on the type of document being created, select one from the drop-down box.

The Category drop-down box may be modified under Lookup Management on the Setup Console to fit the Organizations needs. Use the drop-down box to find the category of **Document Integration** and on the right side of the screen, make sure Add New is selected and click the **[Add New]** link after typing in the new category. Categories may also be edited by clicking the category to modify, enter the correction and select update. Categories are used at Client/Policy level to narrow down the large list of documents to make locating them a little less cumbersome.



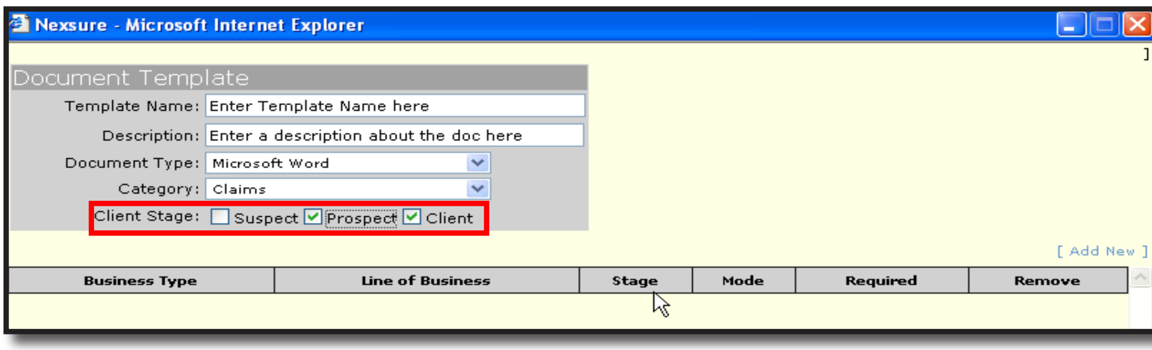


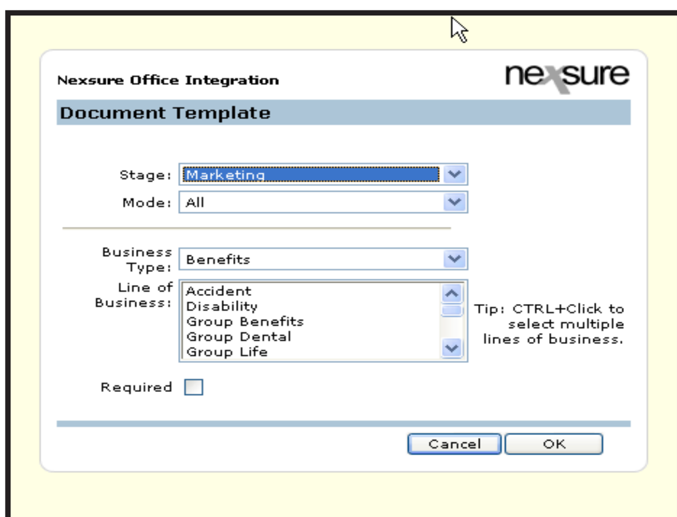
Since the document will be used at client/policy level it is important to indicate at what client stage the document will be needed. There are three client stages and if necessary all one or two may be selected.



Description	Definition
Suspect	Select Suspect if the document is to be used for suspects, although keep in mind that no forms exist for suspects unless an opportunity is added. Otherwise, any suspect documents should be basic information regarding the account just prior to creating a form, such as name, address and/contact name.
Prospect	Select Prospect if the document is to be used for prospects. Entities that have never had an in force policy.
Client	Select Client if the document is to be used for clients. Those entities who have in force policies.

If the document requires coverage data or just policy header data, the lines of Business must be added to the Template. Click the **[Add New]** link on the right side of the screen to add the lines of businesses.





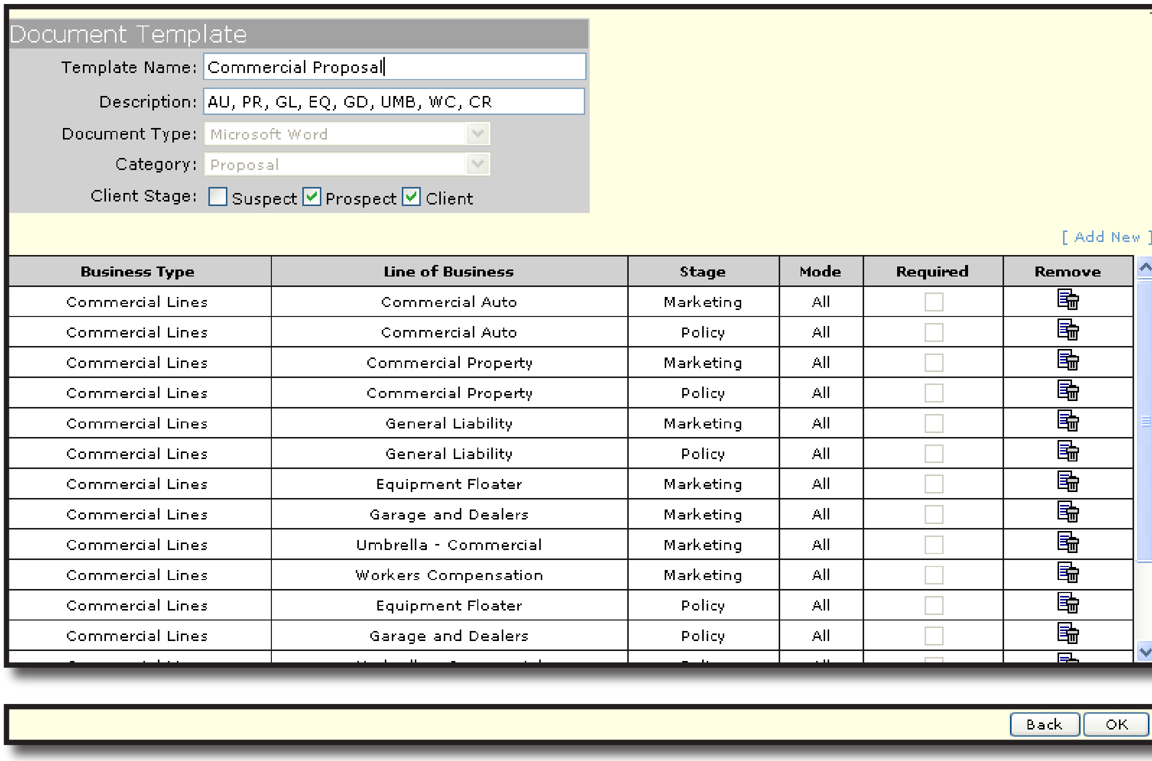
In the Nexsure Office Integration window make choices based on the information provided below.

Description	Definition
Stage	**There are 3 policy Stages:** **1. Opportunities – An Opportunity at Client level must be added and the form on the Opportunities Underwriting screen must be completed to merge data to the Word or Excel document.** **2. Marketing – Only form data from marketing included.** **3. Policies – Only form data from policies included.**
Mode	**There are 3 policy modes but an option for all is available:** **1. New – Select if the document is exclusively used for policies newly written and have a policy mode of New.** **2. Renew – Select if the document is exclusively used for renewal policies and have a policy mode of Renew.** **3. Re-New-Co – Select if the document is exclusively used for policies that are a renewal to the agency but new to the carrier and have a policy mode of Re-New-Co.** **Many documents will be for all modes but there will be exceptions such as new business letters. A mode of new would only be selected.**
Business Type	**This relates to the group that the form can be found in. There are 5 types:** **1. Benefits** **2. Bonds** **3. Commercial Lines** **4. Financial Services** **5. Personal Lines** **Use these to help filter through the Line of Business list.**
Line of Business	**After selecting the specific type, select a line of business or more than one that the document will be used on by holding down the control key and clicking with the left mouse button. The line of business must be added in order to use the document on that line of business at client/policy level.**
Required Check Box	**Use this check box only if it is required to have the selected line of businesses in order to access the letter at client/policy level.**

When selecting the Lines of Business, multiple lines may be selected by holding the control key and clicking each line that will be added. Click the **OK** button to add all the selected lines of business to the template.

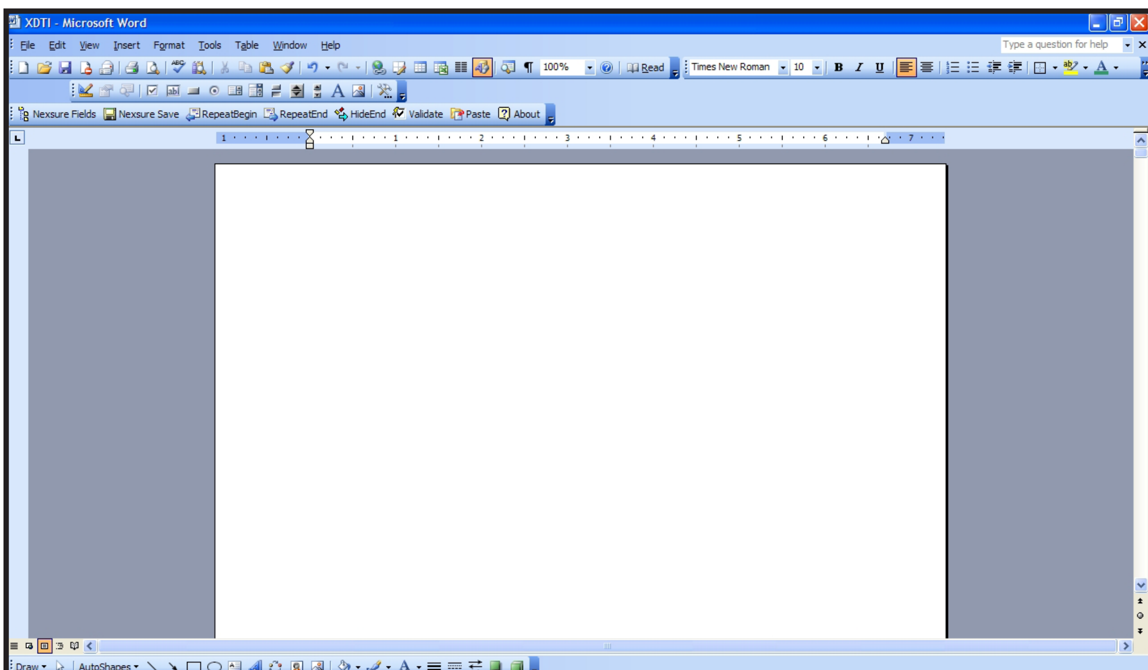
> **Note:** If the correct stage and line of business is not added to the template, the document cannot be merged for the missing stage or line of business.

If both Marketing and Policy stages are required, select all the Line of Businesses for one stage first, then select the **[Add New]** link again and add the other stage line of businesses. The screen should look something like the illustration below:



Business Type	Line of Business	Stage	Mode	Required	Remove
Commercial Lines	Commercial Auto	Marketing	All		
Commercial Lines	Commercial Auto	Policy	All		
Commercial Lines	Commercial Property	Marketing	All		
Commercial Lines	Commercial Property	Policy	All		
Commercial Lines	General Liability	Marketing	All		
Commercial Lines	General Liability	Policy	All		
Commercial Lines	Equipment Floater	Marketing	All		
Commercial Lines	Garage and Dealers	Marketing	All		
Commercial Lines	Umbrella - Commercial	Marketing	All		
Commercial Lines	Workers Compensation	Marketing	All		
Commercial Lines	Equipment Floater	Policy	All		
Commercial Lines	Garage and Dealers	Policy	All		

After adding all the lines of business, click the **OK** button to launch the document.



Notes

Working in Word to Create a Document Template

HOW to Add Nexsure Fields

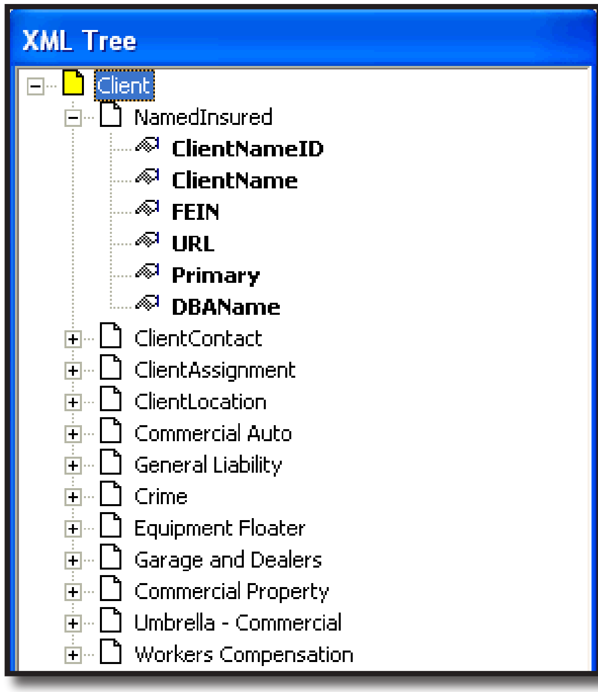
Once the document has been launched notice there are several buttons not normally found in a Microsoft Word document:

- Nexsure Fields
- Nexsure Save
- Repeat Begin
- Repeat End
- Hide End
- Validate
- Paste
- About

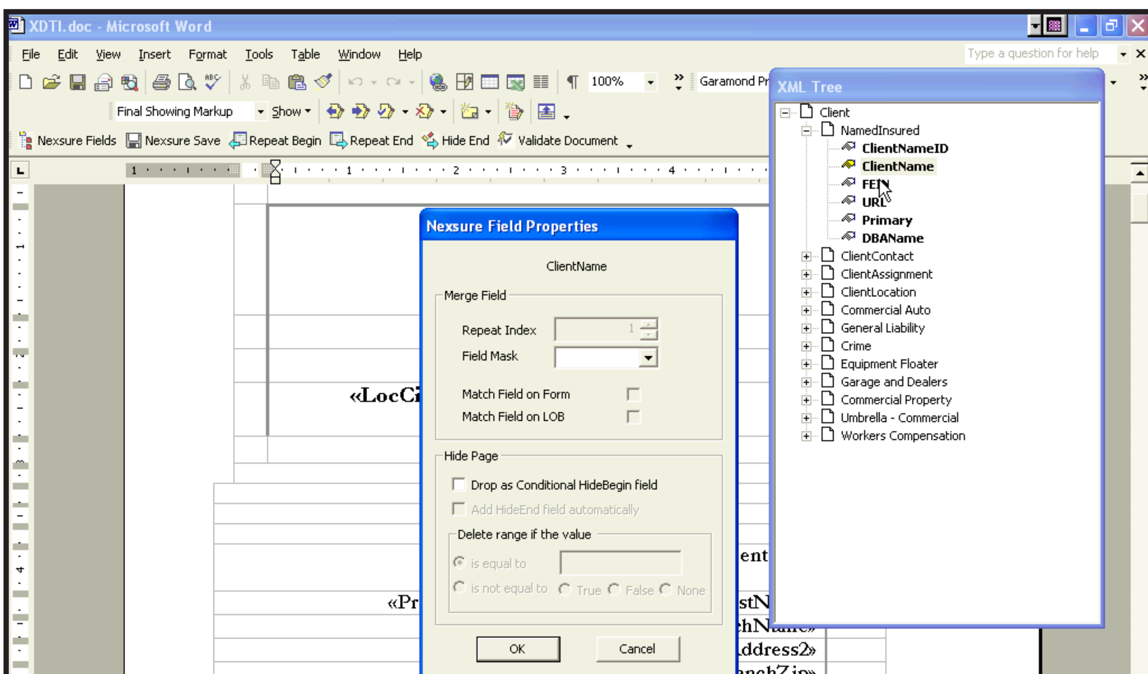
The Nexsure fields are where the XML data fields reside. Click this button to launch the XML Tree window. The XML Tree stays on the top of the document and may be resized as necessary.

Note: Nexsure buttons in Word 2007 are found on the **add ins** tab.

Before placing Nexsure fields in the document, position the cursor where the field will be placed in the document. Open files in the XML tree by clicking on the "+" and navigate to the section where the data resides. The XML tree is built like the way you might use Nexsure to make it easy to find the fields. For example, each form follows the same order as the tree on the policy underwriting screen. (Producer, Applicant, Billing, etc.)

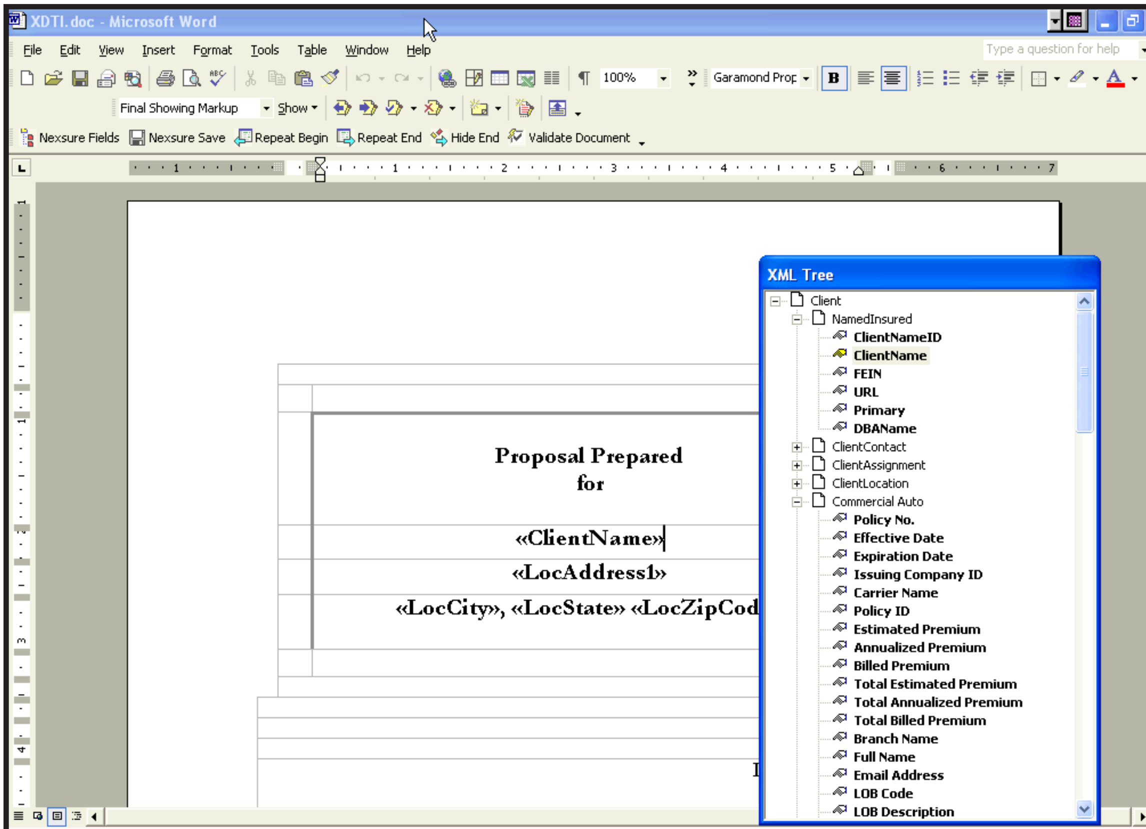


To insert the Named Insured into the document, click on the "+" beside Named insured folder to open. Click on **ClientName** and drag toward the document to display the Nexsure Field Properties window. The choices made here are very important and depending on whether the field is from client level, policy or form level determines the available options.



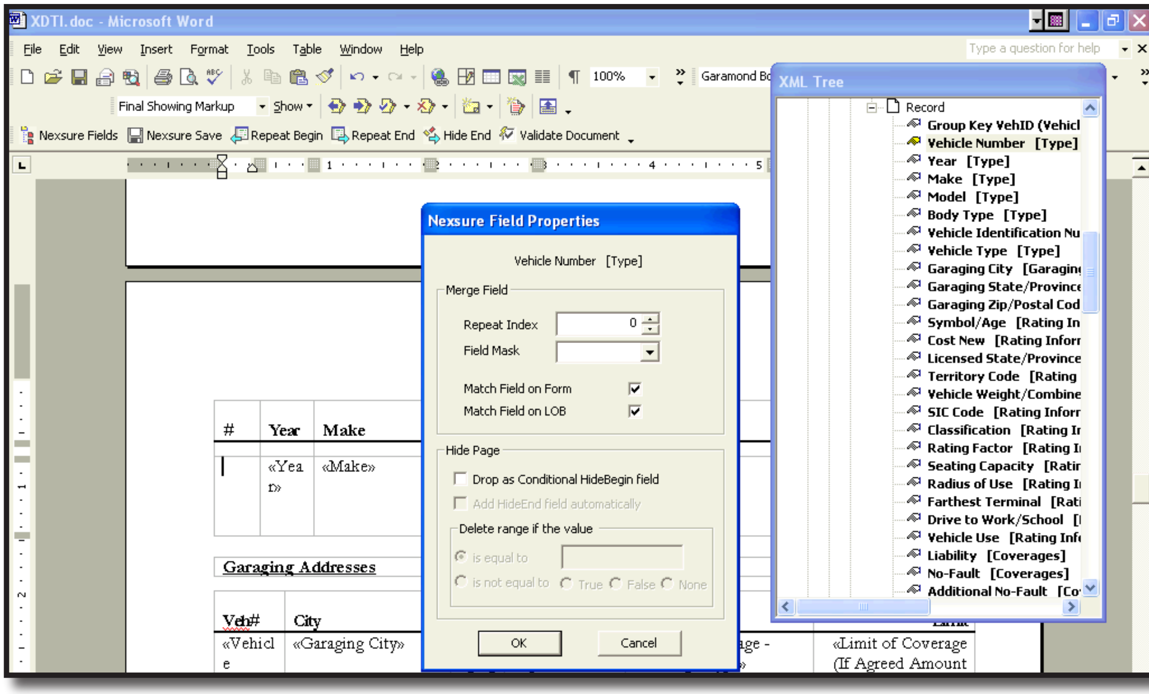
When any field is selected that is neither from a form nor policy the only options available are Field Mask and the Hide Page option. The Hide page option will be discussed later in this document. Mask is only used to format numeric values if needed, which means it will not be used when dropping a character containing field to the document such as in this case.

To complete the process, click the **OK** button. The field is now in the document where the cursor was placed.

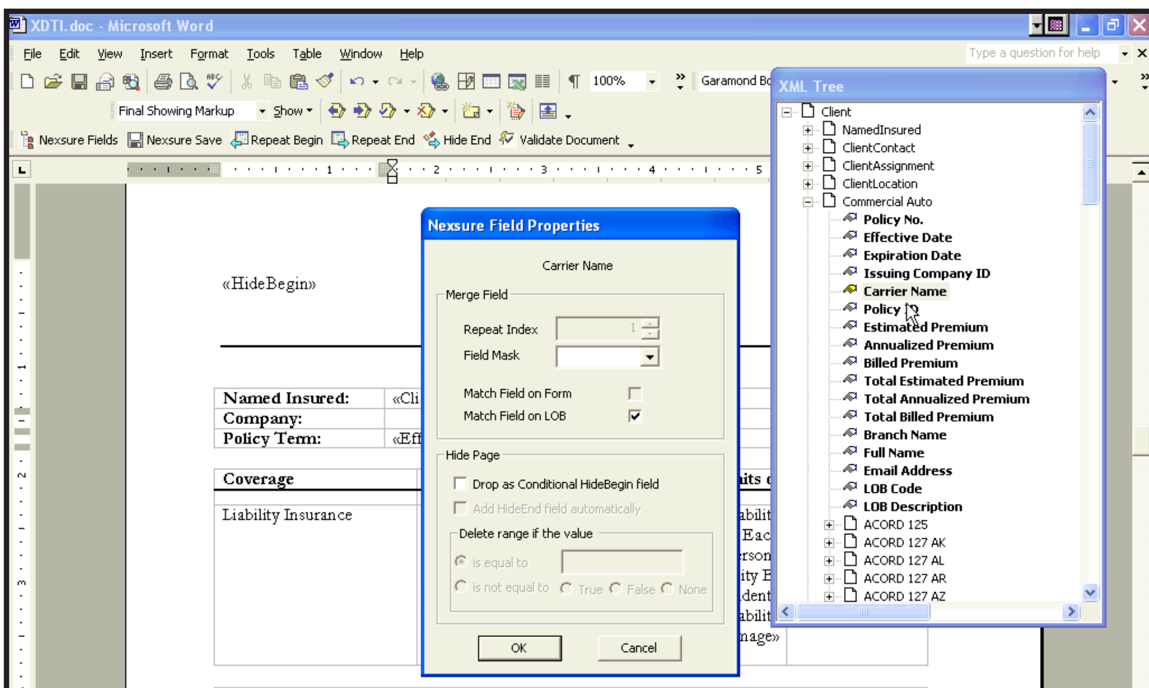


Repeat Index

The Repeat Index in the Nexsure Field Properties window is only available on scheduled items, such as a schedule of vehicles. By default, the Repeat Index will automatically show a 0 when the field comes from a schedule. When set to 0, all items in the schedule are returned when the document is merged at client/ policy level. If the Repeat Index is set to any other number then the data returned is restricted to that number of items from the schedule starting with the first item in the schedule.



The Repeat Index is not available on any fields not found in a form or for fields that are not found in a schedule.

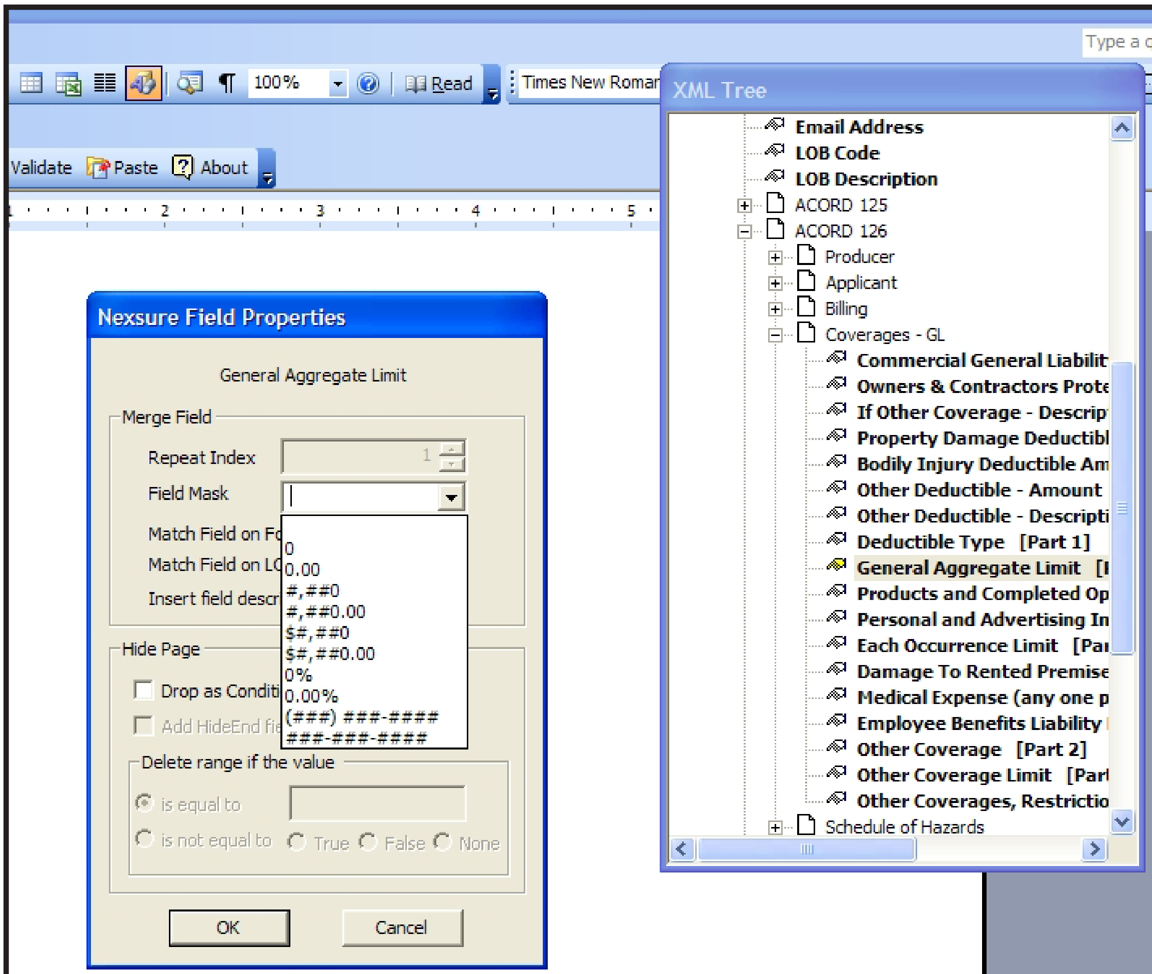


Note: Any scheduled items must be placed in a table in order to merge properly.

Field Mask

With some fields numeric formatting may be desired. In Nexsure, this formatting is possible simply by selecting the format type when the field is selected to be placed in the document.

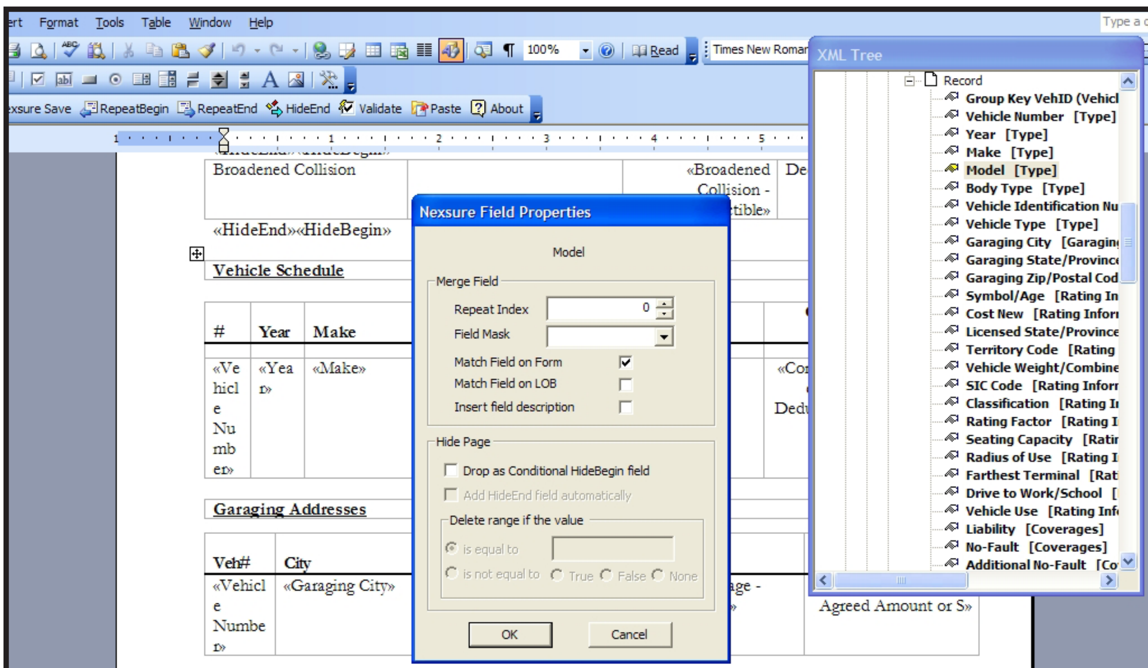
After dragging the selected field toward the document the Nexsure Field Properties window is displayed. In the Field Mask drop-down box, choose the format type desired for the numerical value. If no formatting desired, leave the field without a mask. Click the OK button to drop the field into the document. When the document merges and data exists, the numeric value will automatically format according to the selection made here.



Match Field on Form

The next check box to consider is the Match Field on Form. This is used to isolate or not for state specific forms such as Auto. When adding fields from the state specific form one of the first things to determine is, will this field populate only a specific form type? If this is the case then the Match Field on Form check box must remain checked. What this means is that if the document is merged with a state form where the fields were not used in the creation of the template, no data will merge to the document.

If the field is to be used in a document that will not require specific data from a particular form, the Match Field on Form check box should be unchecked. The unchecked box means that the field will populate with the selected line of business data regardless of state if the field matches when merged at client/policy level.



<u>Example:</u> If the Uninsured limit field was selected to populate the document using the ACORD 127 CA form and merged using the ACORD 127 AL, what would the results be with the boxes checked and unchecked?

SAMPLE OF RESULTS:

Description	Limit
Uninsured Match Field on form box unchecked	**$100,000**
Uninsured Match Field on form box checked	
Uninsured Match Field on form and Match Field on LOB box unchecked	**$100,000**
Uninsured Match Field on form and Match Field on LOB box checked	

Match Field on LOB

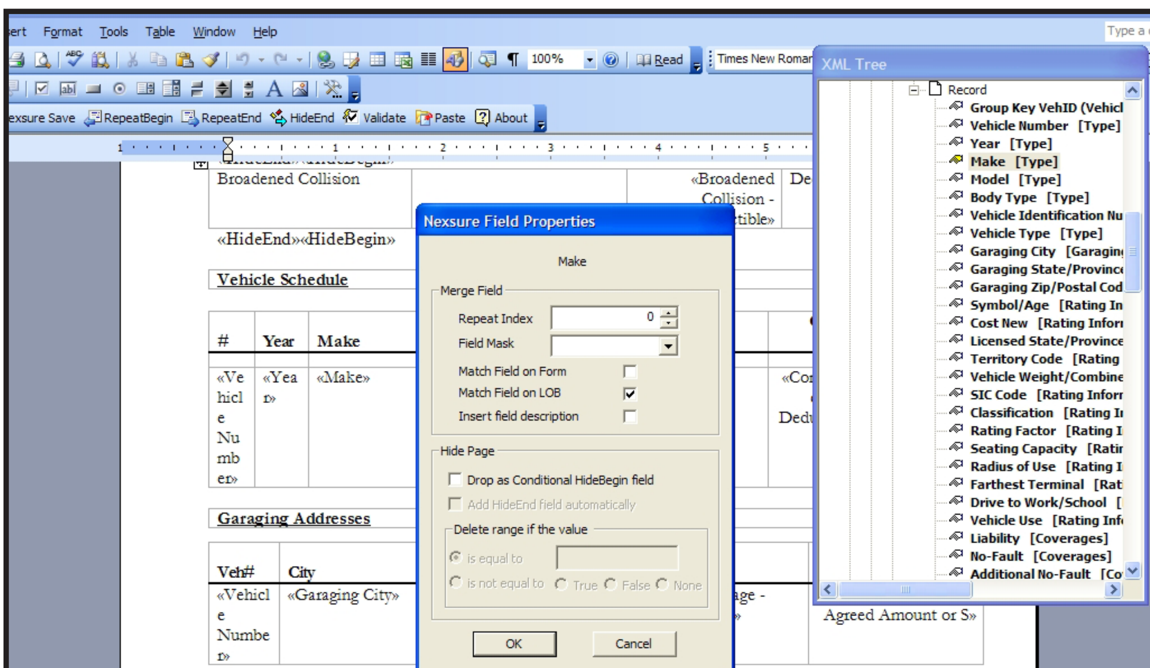
When adding fields from the policy header it is important to identify if the field should populate only a specific line of business in the Nexsure Field Properties before clicking the **OK** button to place the field in the document. The unchecked box means that the field will populate with the selected line of business data (as long as that line of business is associated with the template in setup) when merged at client/policy level. If the box is checked the Line of business must exist (and must be associated with the template in setup) in order for the data to populate in the document when merged.

<u>Example of Use:</u>

If the Carrier name field will be used more than once in a document for different lines of business, such as in a proposal, the LOB box must remain checked to return the Carrier Name assigned to that line of business.

If the document is to be used for one policy at a time, then save setup time by making sure the Match Field on LOB is not checked. By not checking the box no matter what line of business is selected, the carrier name will populate when merged. However, the line of business must be added to the template in setup and exist on the client policy selected.

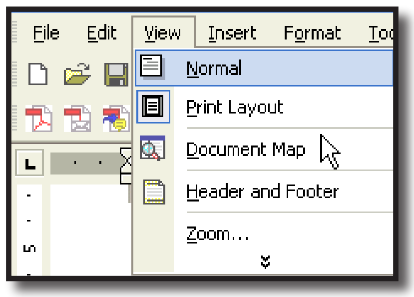
Note: Make sure to place letters with the Match Field on LOB not checked under a category that identifies these letters to be used when selecting one policy. Consider the following category – Single policy documents.



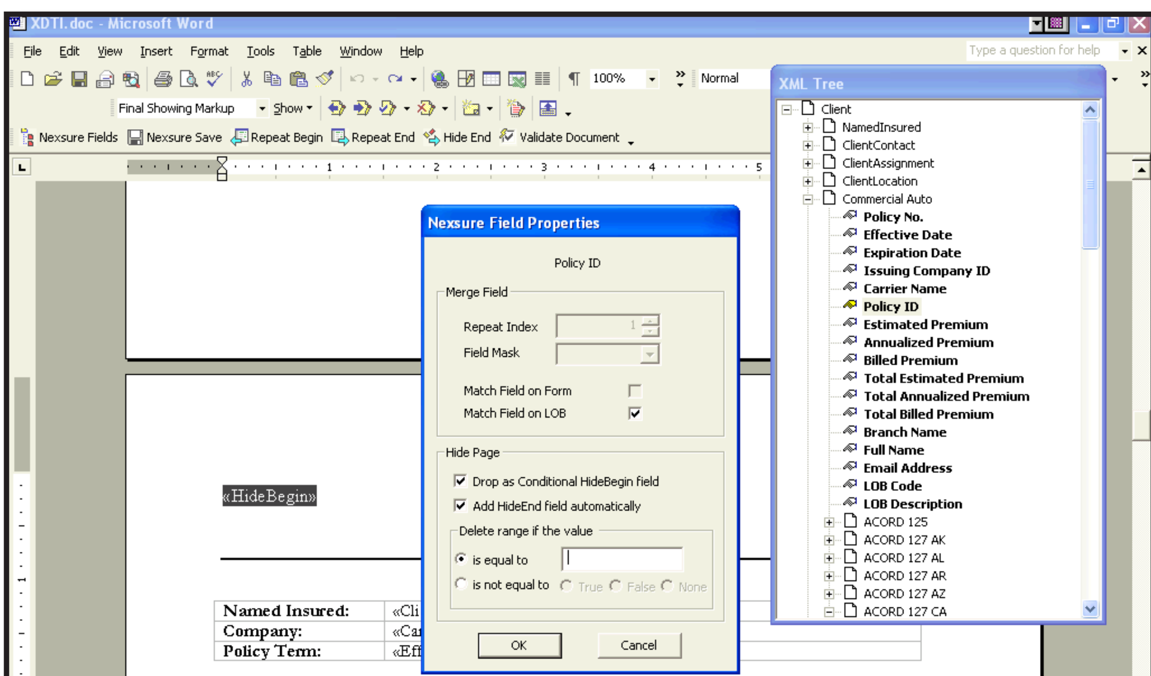
Hide Page

The Hide Page feature in the Nexsure Field Properties window is used to hide entire pages if the line of business is not present such as in a proposal. It can also be used around tables to hide data that does not exist.

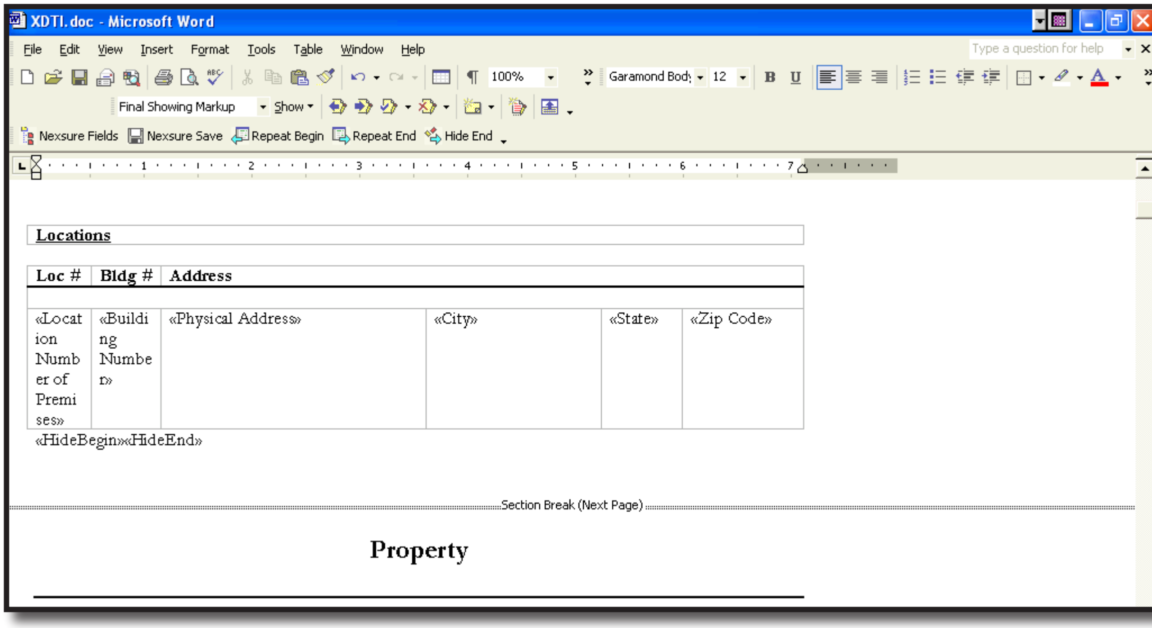
To use the Hide Page feature it is easiest to view the document in Normal mode. (Select View from the menu and normal). This view will display all the page breaks so they may be included above or below the HideBegin/HideEnd fields. Place the cursor where the HideBegin is to be placed. (HideBegin is the starting position where the page is to be hidden if the condition is not met.)



It is important to select a field that will identify the section to be omitted from the document. So if the line of business does not exist, consider choosing the Policy ID field. This field is unique and therefore, if it does not exist the page will be suppressed as desired. Find the Policy ID field after selecting the line of business in the XML tree. Drag the field toward the document to display the Nexsure Field Properties. Click the check box beside Drop as Conditional Hide Page Field. Notice that the "Add HideEnd Field automatically" check box is checked. Leaving this box checked automatically places the HideEnd field immediately after the HideBegin. This HideEnd field will need to be moved to the end of the page that will be omitted if the Policy ID in this case is not found. In this scenario, if the field has no data the desired effect is to omit the page, so leave the Delete page if the value is field blank.

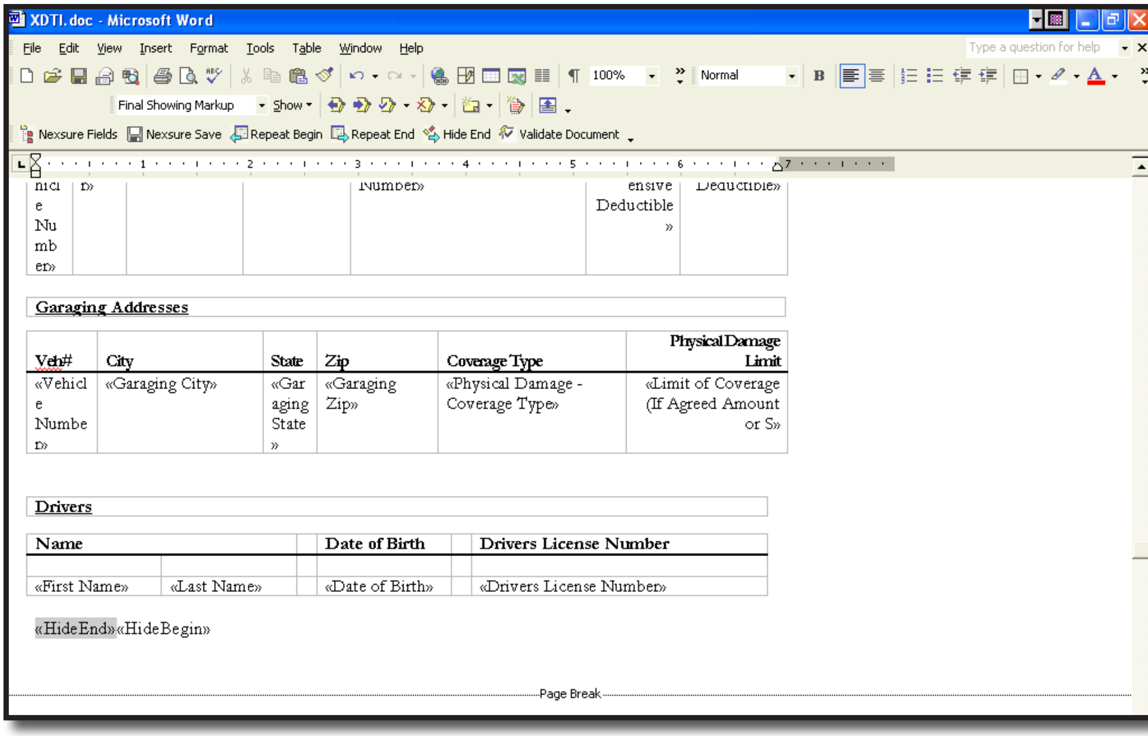


The HideBegin and HideEnd is dropped into the document. Notice that the HideBegin was placed above the Section Break (Next Page). Doing this will suppress any empty pages.



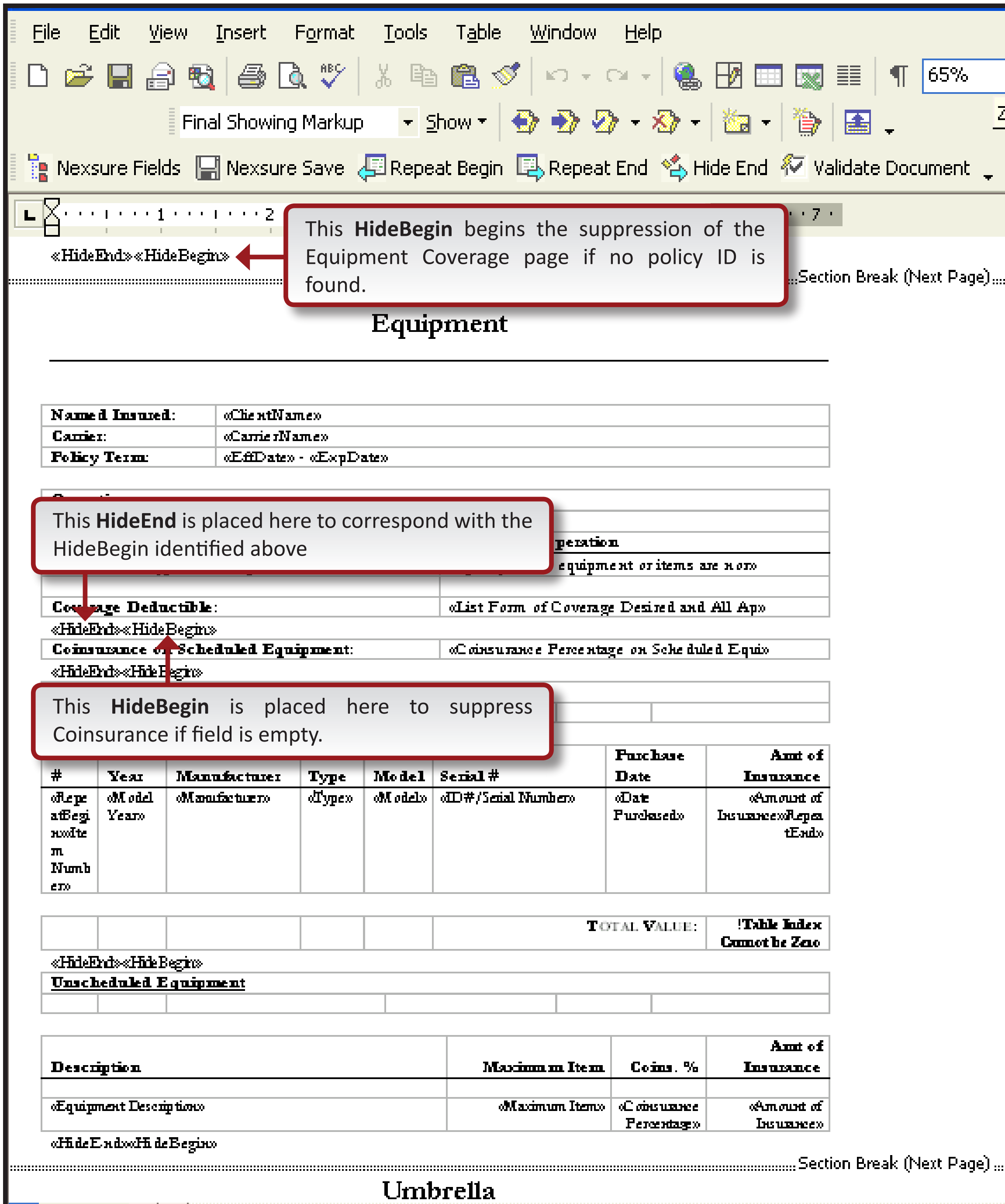
> **Note:** If the HideEnd box was not checked in the Nexsure Field Properties window, place the cursor where the HideEnd should be placed and click the HideEnd button Hide End on the toolbar to add.

To complete the Hide Page, the HideEnd must be placed where the hidden section of the document should end. To do this, click the **HideEnd** Hide End button on the toolbar after placing the cursor in the document where suppressing or printing the text should end.

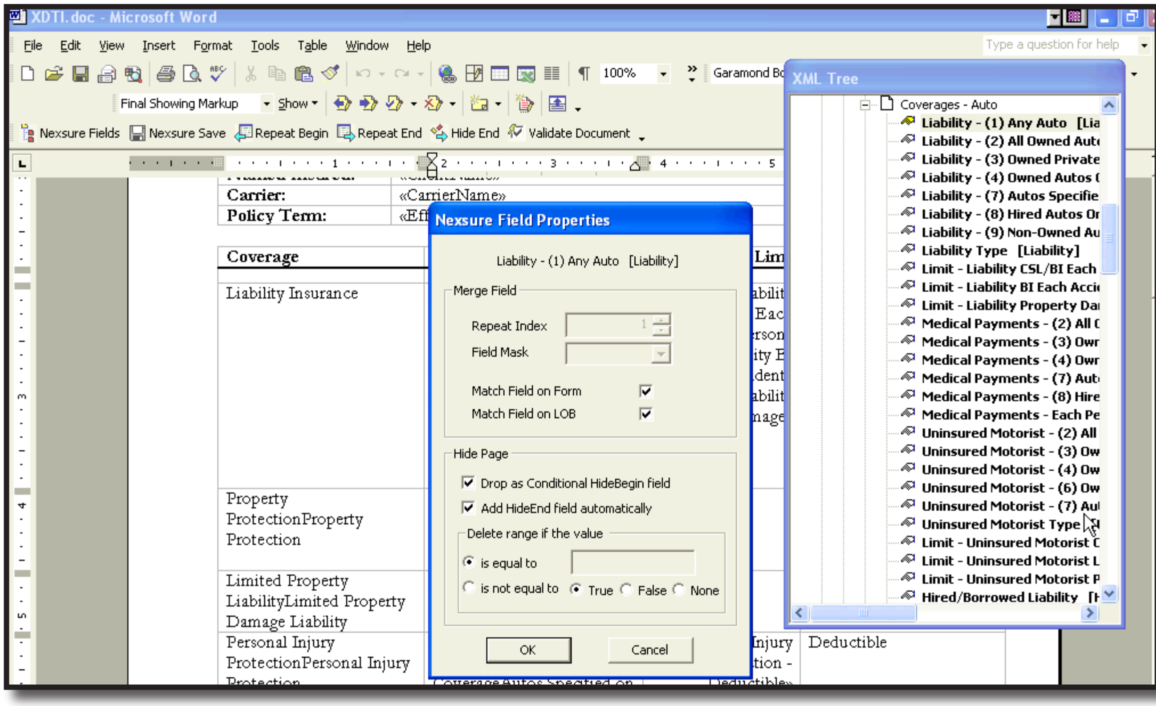


Note: For every HideBegin there must be a corresponding HideEnd. If not when the document is merged these HideEnd fields will print on the merged document. Use the printed merge fields to help troubleshoot where missing fields may be.

Use HideBegin and HideEnd, not only to hide pages but to hide sections or coverages between the page hides. Below is an example of this.



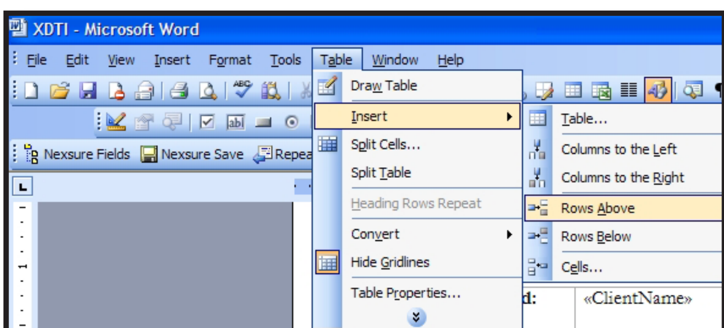
Use the **True**/**False**/**None** option buttons with the HideBegin **equal to =** option or **not equal to <>** option for **Yes**/**No** responses on the forms such as questions (or even something like automobile symbols).



Using the Repeat Buttons

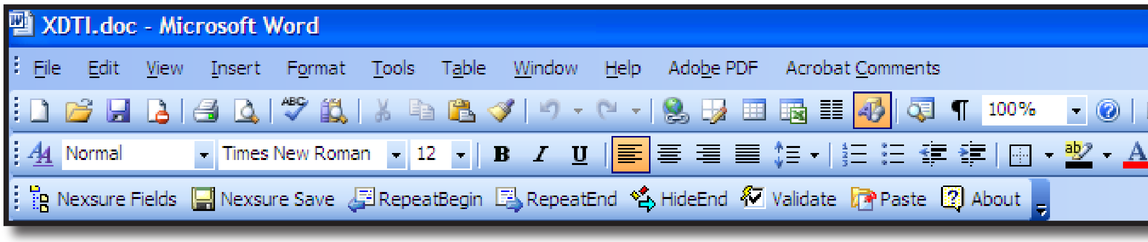
Another feature that may be needed when creating documents is the RepeatBegin/RepeatEnd option. This is only used in the event scheduled items need to merge in a format slightly different than just a listing of data. In this example, it is desired to have the address in the Commercial Property display above the coverages. In order for this to work properly, the RepeatBegin and End must be used.

After adding all the fields for the property inside the table letting the repeater index default to 0, place the cursor in the first column under the header row and click Table on the menu and insert a row above the coverages. Next click the Nexsure Fields button and locate the ACORD 140 Premises Info section. Open and then click and drag location street address into the newly inserted row.



To insert the RepeatBegin field, place the cursor in front of the Location Street address field and click the RepeatBegin button.

To stop repeating after all data has been merged a RepeatEnd must be added to the document. To insert the RepeatEnd, place the cursor in the last column after the last field and click the RepeatEnd button on the toolbar. Notice that the RepeatEnd field is inserted into the document.



Coverage Detail

Loc #	Bldg#	Subject	Amount	Coins.	Valuation	Cause of Loss	Deductible
«RepeatBegin»«Location Street Address»							
«Premises Number»	«Building Number»	«Subject of Insurance» «Policy_SubjectOfInsuranceCd1» «Policy_SubjectOfInsuranceCd3»	«Amount of Insurance Required» «SOI_Amount1» «SOI_Amount3»	«Coinsurance Percentage» «PercentOfCoinsurance1» «PercentOfCoinsurance3»	«Valuation» «Property_ValuationTypeCd1» «Property_ValuationTypeCd3»	«Causes of Loss» «Loss_LossDesc1» «Loss_LossDescr3»	«Deductible» «CommlPropertyInfo_DeductibleBasisCd1» «CommlPropertyInfo_DeductibleBasisCd3»«RepeatEnd»

Merged Results of RepeatBegin and RepeatEnd:

Coverage Detail

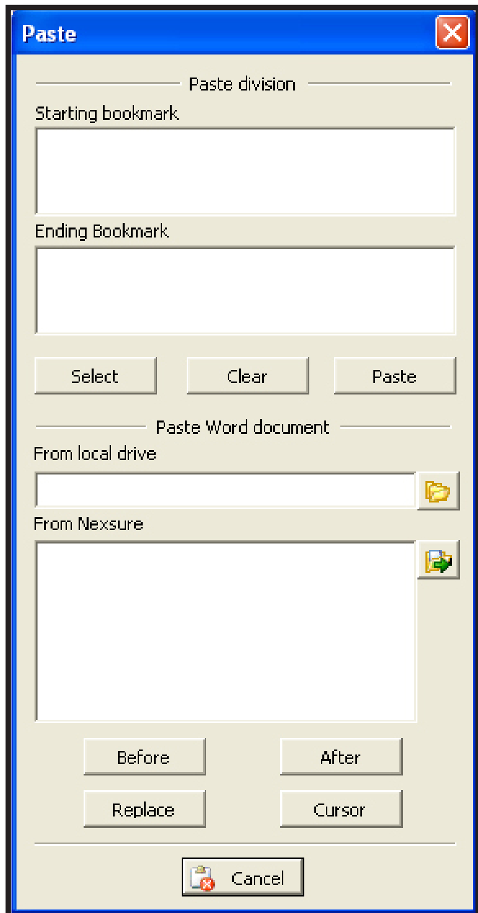
Loc #	Bldg#	Subject	Amount	Coins.	Valuation	Cause of Loss	Deductible
1000 Main Street Boulevard Drive Av							
1	1	Building	$1,000,000	8%	RC	Special	$ 500
		Contents	$350,000	80%	RC	Special	$ 500
2000 Main Street Boulevard Drive Av							
2	1	Building	$2,000,000	8%	RC	Special	$ 200
		Contents	$250,000	20%	RC	Special	$ 200
3000 Main Street Boulevard Drive Av							
3	1	Building	$3,000,000	30%	RC	Special	$ 300
		Contents	$33,333	33%	RC	Special	$ 333

Note: RepeatBegin and **RepeatEnd** is not needed for ordinary schedules such as a listing of vehicles or drivers. The repeat index setting of zero will work for most all schedules.

Moving Sections that have Bookmarks

1. Decide where the block of text should be moved to and place the cursor in the new position.

2. Click **Paste**. The **Bookmarks** dialog box is displayed.



3. In the **Bookmarks** dialog box, in the **Starting bookmark** area, select the name of the beginning bookmark. The beginning of the block of text to move.

4. In the **Ending Bookmark** area, select the name of the ending bookmark. The end of the block of text to move.

5. Click **Paste**. The selected text is moved to the new location in the template. All other text is moved to accommodate the repositioning.

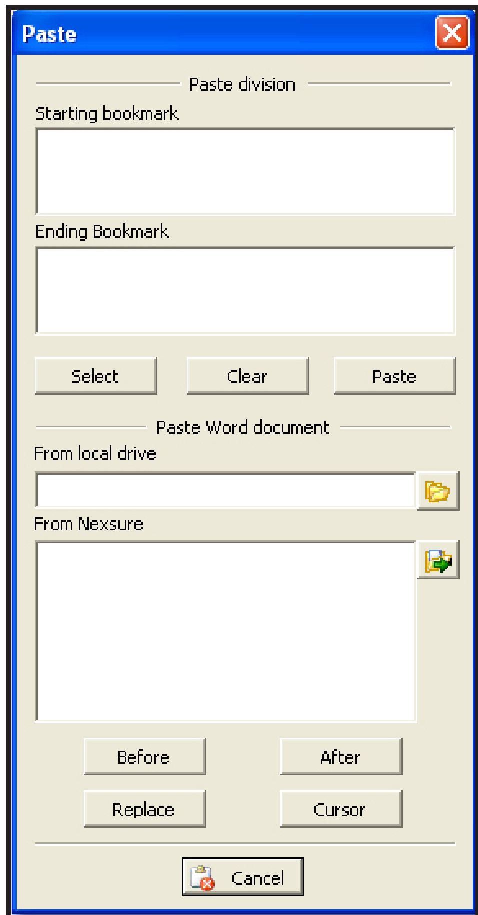
6. Another option in the **Bookmarks** dialog box is to click **Select** instead of **Paste**. Clicking **Select** will simply leave the block of text highlighted.

Inserting Nexsure and Local Documents into Templates

Many times locally saved documents or previously created templates can be used to save template creation time.

To insert a Word document into the template, use the following guidelines:

1. Click **Paste**. The **Paste** dialog box is displayed.



2. The document to insert can be from a local drive or from Nexsure. Click the **Folder** icon to navigate to a document on the local drive or click the **Nexsure Folder** icon to select a document from Nexsure to insert.

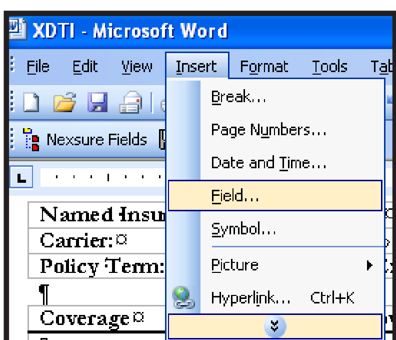
3. The following options are available for positioning the document to be inserted:
   - **Before:** Insert document before starting or ending bookmark selected (Bookmarks must be in place before available).
   - **After:** Insert document after the starting or ending bookmark selected (Bookmarks must be in place before available).
   - **Replace:** Replace open document content with selected document content (Bookmarks must be in place before available).
   - **Cursor:** Insert document where cursor is currently placed in the open document.
4. Cancel will close the Paste dialog box without further modification to the template.

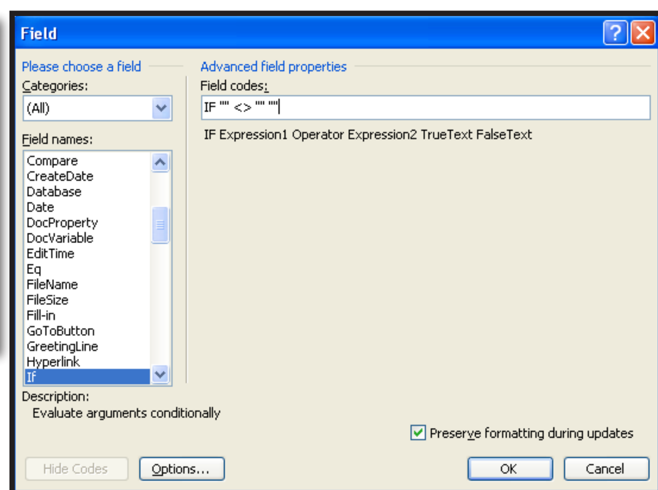
Note: The same feature is also available at the policy detail level however, the **From Nexsure** selections are limited to documents attached to the specific policy.

HOW to Use Conditional Statements

In some instances it may be necessary to translate what is actually in a field to something more meaningful such as the check boxes for the auto symbols. To do this conditional statements built into Microsoft Word may be used.

To add a conditional statement, click **Insert** from the menu and click Field to display the field options. Click on the **IF** field name and in Field Codes after the word **IF**, type “” <> “” “” (make sure to add a space between the operator and quotes: “”space<>space””, you get the idea) and press the OK button. If you have a false answer you will need to add an extra set of quotes at the end. In this example there is no false answer other than do not do anything if false.



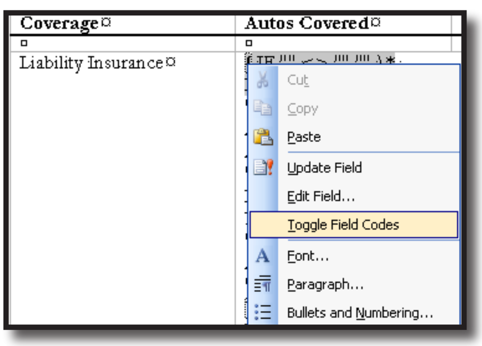


Definition of Operator from Microsoft Word:
Comparison operator (operator: A sign or symbol that specifies the type of calculation to perform within an expression. There are mathematical, comparison, logical, and reference operators.). Insert a space both before and after the operator.

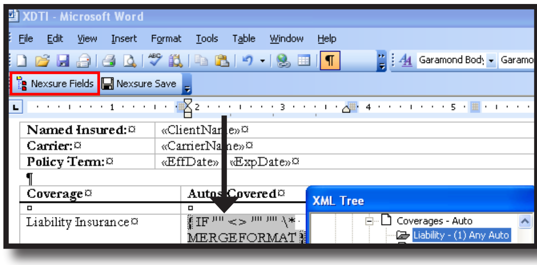
Operator	Description
=	Equal to
<>	Not equal to
>	Greater than
<	Less than
>=	Greater than or equal to
<=	Less than or equal to

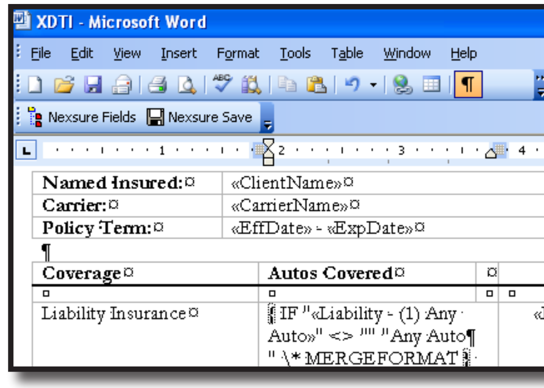
Note: If the operator is = or <>, Expression2 can contain a question mark (?) to represent any single character, or an asterisk (*) to represent any string of characters. The expression must be enclosed in quotation marks so that it is compared as a character string.

The conditional statement is placed into the document but it cannot be seen. To display the statement, right click where the statement should be and select toggle field codes.



Since the conditional statement has no fields placed between the quotes, it is incomplete. To complete, place the cursor between the first set of quotes immediately after the word IF. Click the Nexsure Fields button and find the field to place between the quotes. In this example, open a Commercial Auto line of business, any state, and click on Coverages-Auto folder and click and drag Liability – (1) Any Auto. Make sure to clear the check box for Match Field on Form if writing business in multiple states, if not leave checked. Click OK, the field is placed between the first set of quotes but the conditional statement does not display. Right click where the statement is sitting and select toggle field codes to display the statement. So far the statement says "If "Any Auto field" is not equal to "blank" "blank". To have the words any auto return if the field is not blank, place the cursor between the last set of quotes and type Any Auto. If a carriage return is needed as well press the enter key. The Any Auto and carrier return will only occur if the field is not blank.





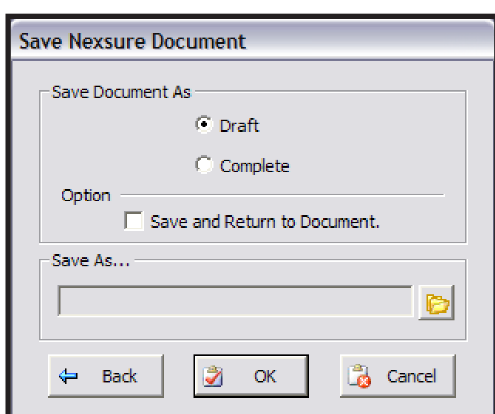
Using the Paste Button

The **Paste**  button can be used to move blocks of text in Word templates. To mark blocks of text that may need to be moved use the following to first add bookmarks:

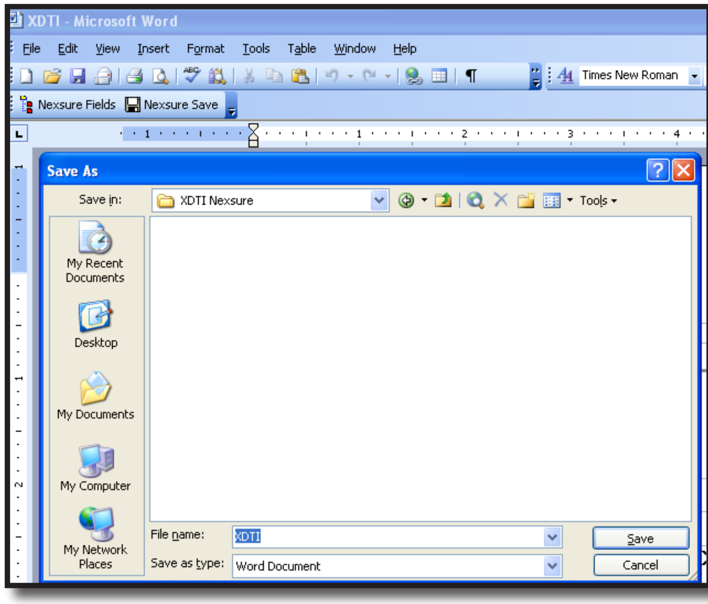
1. Place the cursor at the beginning of the section to move.
2. On the **Insert** menu, click **Bookmark**.
3. Give the beginning bookmark a name and click **Add**.
4. Place the cursor at the end of the section to move.
5. On the **Insert** menu, click **Bookmark**.
6. Give the ending bookmark a name and click **Add**. Now a block of text has been defined by the beginning and ending bookmarks.

HOW to Save the Document

To save the document, click the **Nexsure Save** button and OK to save. To abort the save process and go back to the document select Back. To Abort the document entirely, click Cancel button and on the next pop-up window the OK button. Selecting **Draft** and saving the document template as a **Draft** ensures the template can be edited in the future. Document Templates saved as **Complete** indicate they are final and not to be changed.

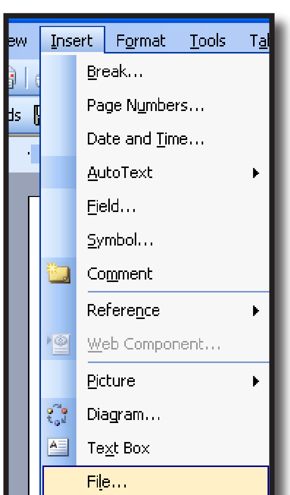


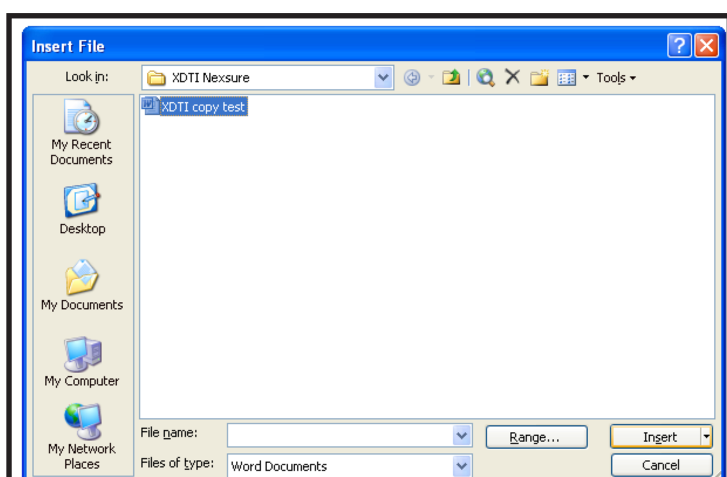
The document may also be saved to the locally and retain the validity of all the Nexsure fields by clicking File Save As folder icon. Browse to store the document locally.



Once the document is saved, it may be inserted into a template created in Nexsure by first adding the template and launching. Click, Insert on the menu and then file. Find where you stored the document and insert it into the document. No need to replace the fields as they will be fully functional. Do not open Nexsure Office Integration and then try to open another session of word and copy/paste. This will not work and will result in the loss of your document. However, if it is imperative to copy a part of an existing document open that document outside of Nexsure in Microsoft word and leave open and then launch the Nexsure Template. Click the document left open on the task bar and highlight and copy the desired text. Go back to the XDTI.doc and paste the copied text in. Save the Nexsure Template by clicking the Nexsure Save button and OK to keep the pasted text after completing the document. After this is done it is safe to close the document opened outside of Nexsure.

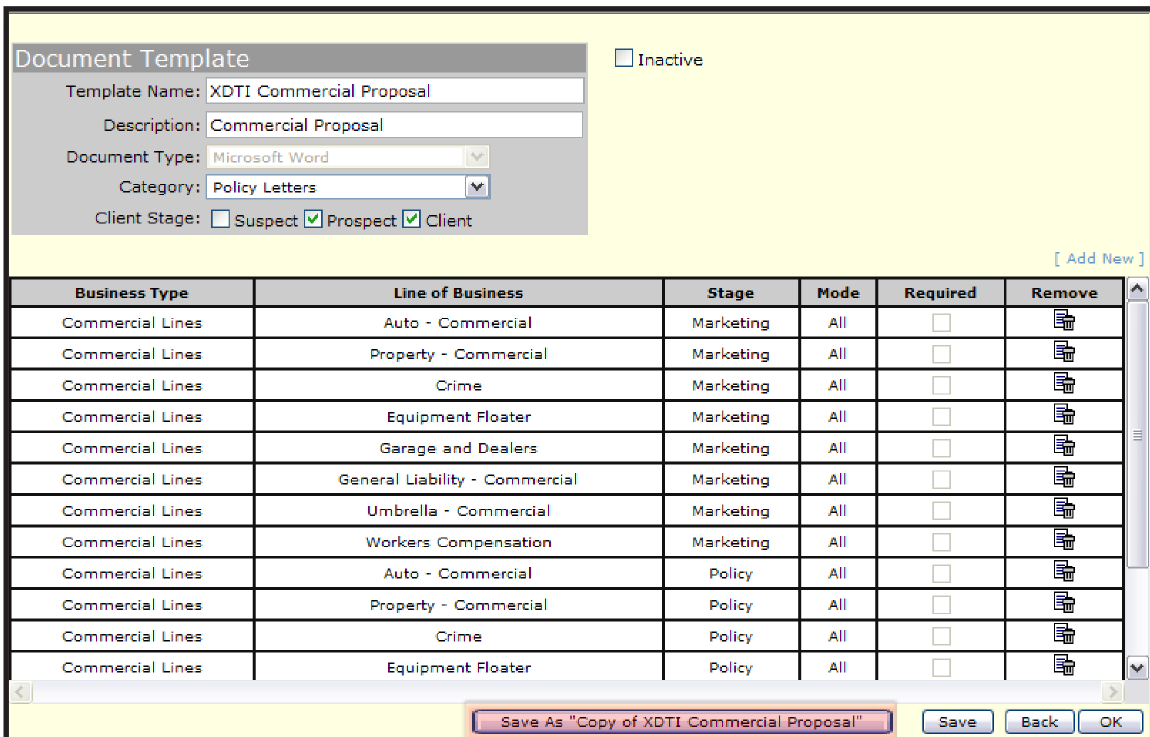
The best method is **Insert > File** option.





To make a copy of an existing Template do the following:

- Click **SETUP** from the Utility menu
- Click Document Templates from the Setup Console
- Locate the document Template to copy
- Click the **Details**  icon from the summary screen
- At the bottom of the screen, click the Save As "XXXX XXXX" button to save a copy of the template. The template will be given the exact name except that it has the words Copy of added to the front of the name.



Document Template

Template Name: XDTI Commercial Proposal

Description: Commercial Proposal

Document Type: Microsoft Word

Category: Policy Letters

Client Stage: Suspect Prospect Client

Inactive

[Add New]

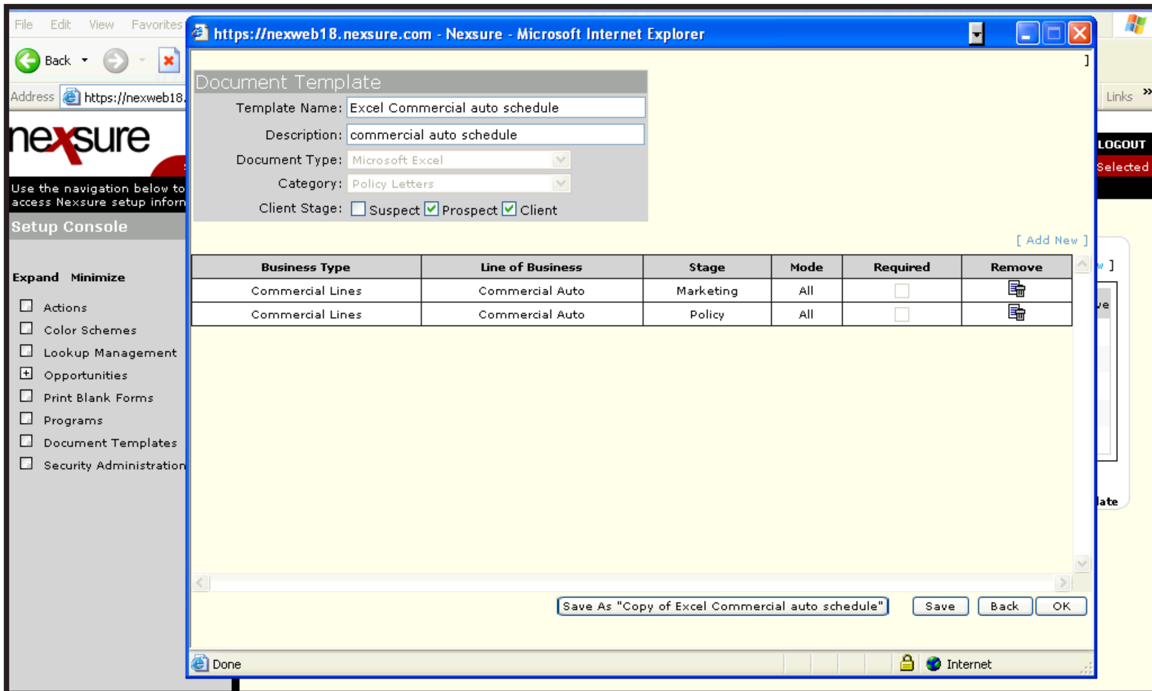
Business Type	Line of Business	Stage	Mode	Required	Remove
Commercial Lines	Auto - Commercial	Marketing	All		
Commercial Lines	Property - Commercial	Marketing	All		
Commercial Lines	Crime	Marketing	All		
Commercial Lines	Equipment Floater	Marketing	All		
Commercial Lines	Garage and Dealers	Marketing	All		
Commercial Lines	General Liability - Commercial	Marketing	All		
Commercial Lines	Umbrella - Commercial	Marketing	All		
Commercial Lines	Workers Compensation	Marketing	All		
Commercial Lines	Auto - Commercial	Policy	All		
Commercial Lines	Property - Commercial	Policy	All		
Commercial Lines	Crime	Policy	All		
Commercial Lines	Equipment Floater	Policy	All		

Save As "Copy of XDTI Commercial Proposal" Save Back OK

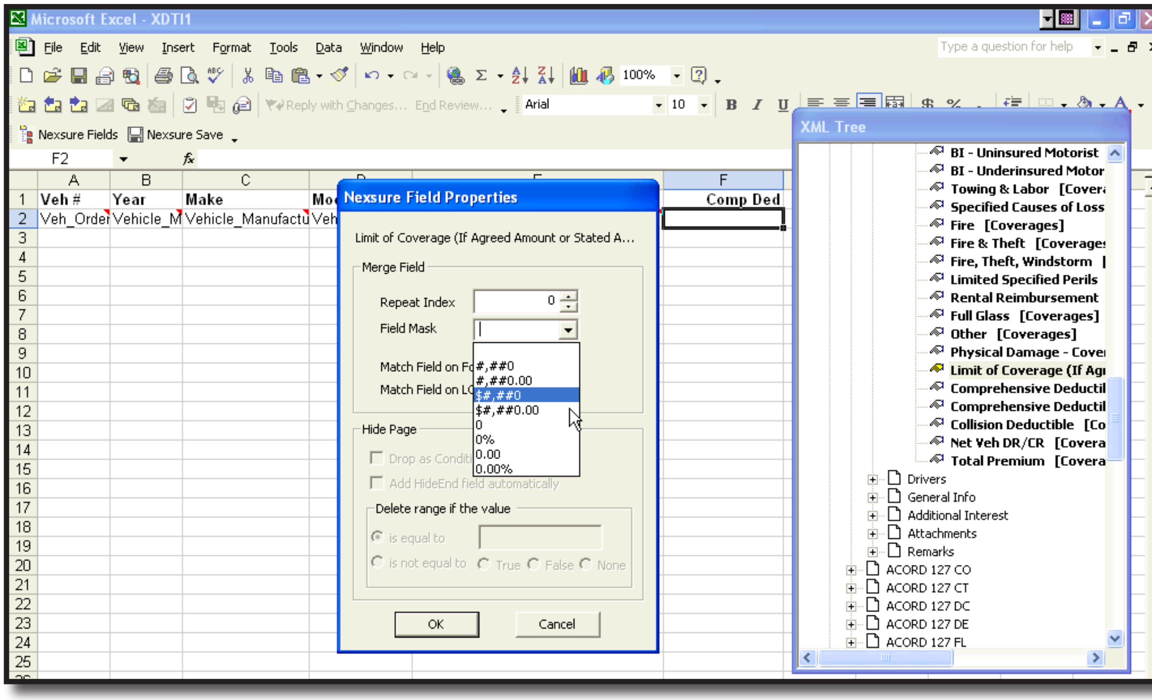
Notes

Working in Excel to Create a Document Template

Follow the instructions on adding Word templates with the exception of choosing the document type of Microsoft Excel.



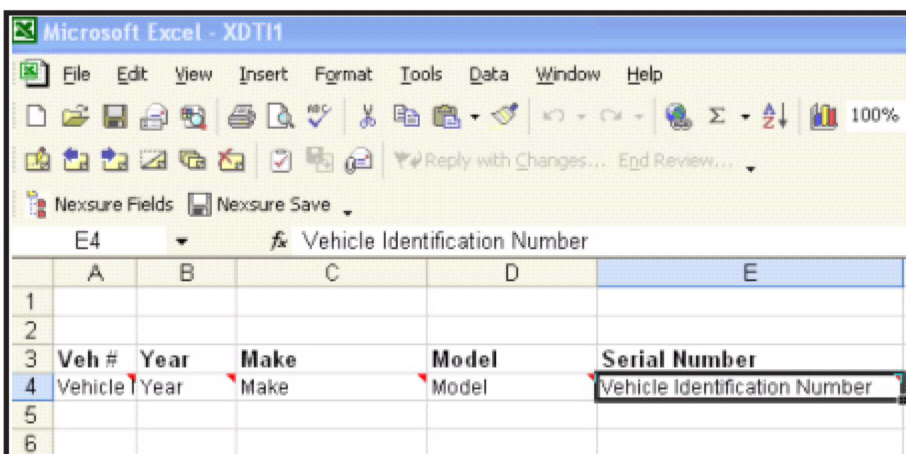
When working in Excel, formatting is available when dragging and dropping numeric fields from the XML tree. Any other formatting done must be done using Excel's built in formatting capabilities.



Make sure when working with schedules such as the Vehicle schedule not to place anything below these fields so there will be enough room for all items to populate as in the example below.

Use the **Nexsure Save** button to save the document.

Note: Only one field should be placed in each cell.

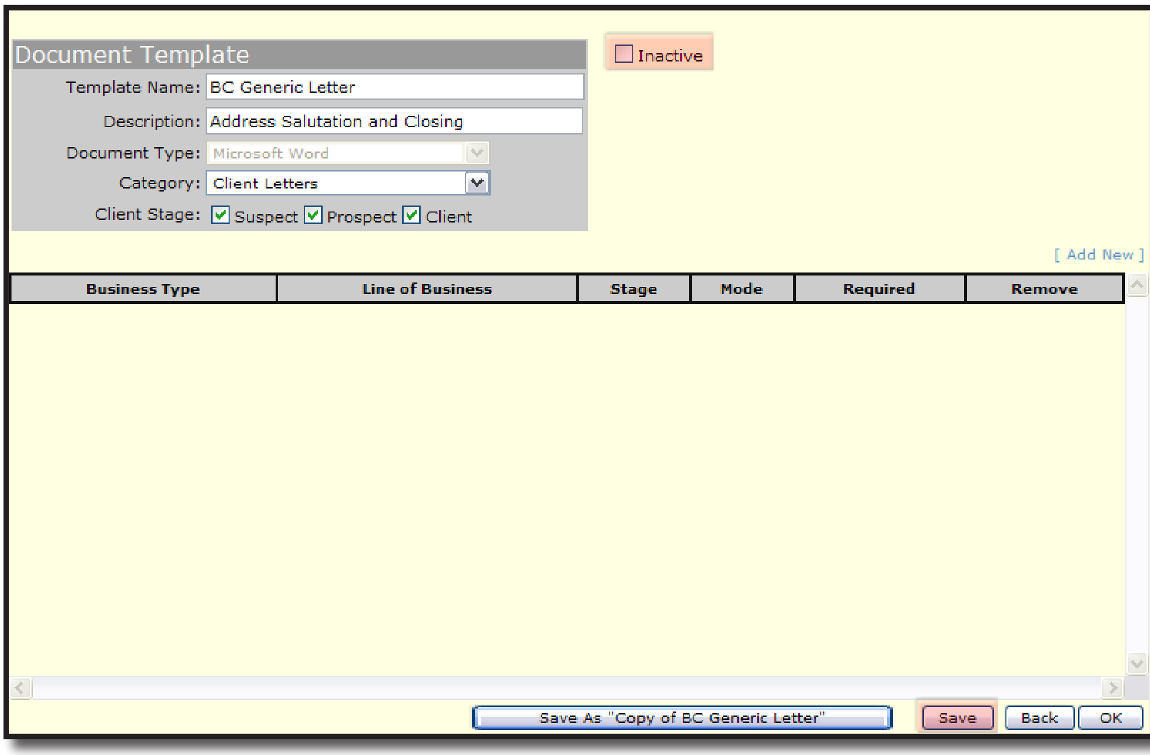


Notes

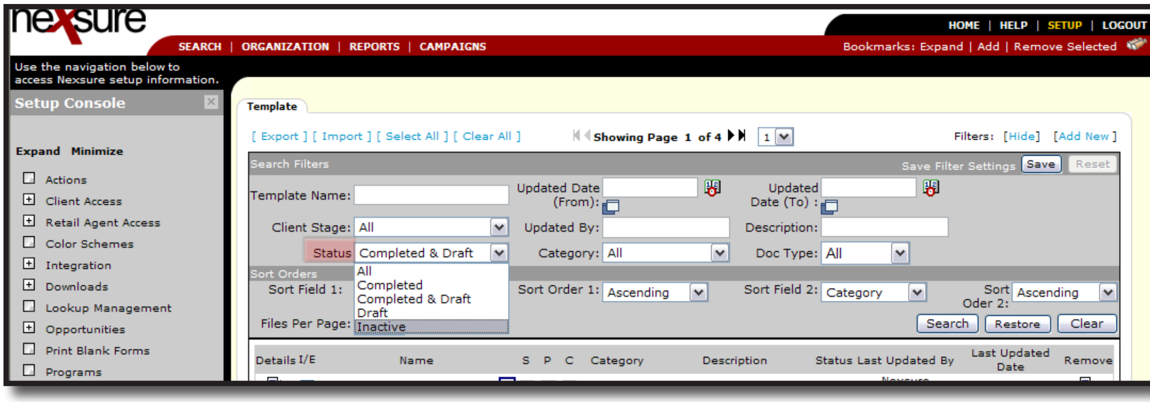
Inactivate and Reactivate Document Templates

Obsolete Document Templates that are not to be used can be inactivated. Inactivating places the Document Template in an Inactive status, eliminating the Document Template from the selection list when a new document is created using a template. The inactive Document Template is maintained as an historical record of the previously used template and may be re-activated in the future.

To inactivate a Document Template, click the template's **Details** icon on the **Template** summary in **SETUP**. The **Document Template** dialog box displays.

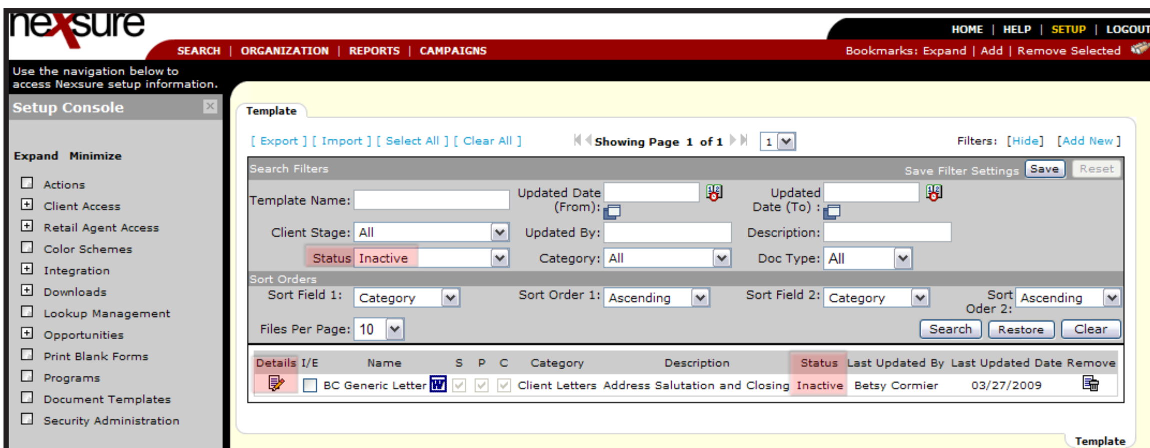


To make the template inactive, select the **Inactive** check box and click **Save**. The **Template** summary screen refreshes and the inactive Document Template no longer displays by default. To view the inactive Document Template, click the filter's **[Show]** link.



Change the **Status** search criteria to **Inactive** and **Search**. All Document Templates with a status of Inactive will display in search results.

To reactivate the Document Template, click the **Details** icon of the Inactive template.

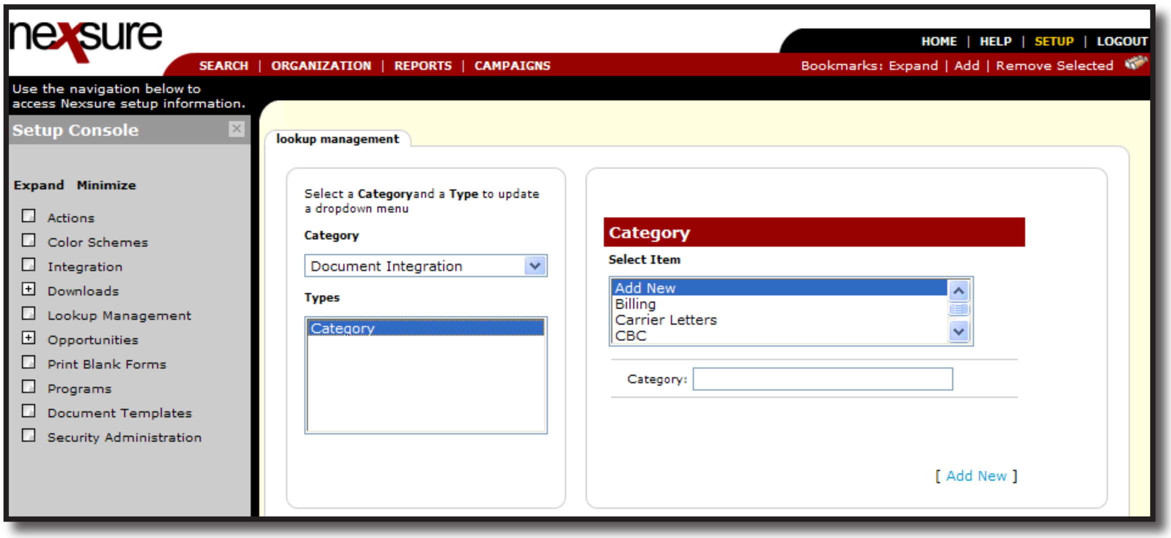


The **Document Template** dialog box displays with a check in the **Inactive** check box. To reactive the Document Template and make it available for selection when creating a new document with a template, remove the **Inactive** check mark and click **Save**.

Notes

Import / Export Document Templates

The **Export** feature exports selected document templates to files that may be **imported** into another Nexsure Organization. Prior to exporting templates, verify that the **Document Integration Category** list in **Lookup Management** of the target organization has been setup with the same categories as the source organization. If the **Category** lists do not match, the import will fail.



For help adding items to **Lookup Management**, refer to “Lookup Management”, in Chapter 6 of this manual.

Establish a folder on your network or local drive to hold the exported files. The folder needs to be accessible to the user exporting document templates from the source organization and also to the user importing document templates into the target organization.

HOW to Export Document Templates

From the source organization, click **SETUP** on the **Utility** menu. The **Setup Console** is displayed. In the **Setup Console**, click **Document Templates**. The **Template** tab is displayed.

Template

[Export] [Import] [Select All] [Clear All] **Showing Page 1 of 3** Filters: [Show] [Hide] [Add New]

Details	I/E	Name	S	P	C	Category	Description	Status	Last Updated By	Last Updated Date	Remove
	☐	BC Generic Letter	✓	✓	✓	Client Letters	Address Salutation and Closing	Draft	Betsy Cormier	09/30/2008	
	☐	BC Policy ID Test				Client Letters	ID Test	Draft	Betsy Cormier	09/25/2008	
	☐	BC Proposal with Demographics		✓	✓	Proposal	Commercial Proposal	Draft	Betsy Cormier	09/09/2008	
	☐	BC XDTI Commercial Proposal		✓	✓	Policy Letters	Commercial Proposal	Draft	Betsy Cormier	03/31/2008	
	☐	BH HO Schedule	✓	✓	✓	Schedules	BH HO Schedule	Draft	Beth Harris	07/24/2008	
	☐	BH MED PROLIAB	✓	✓	✓	Schedules	BH MED PROLIAB	Draft	Beth Harris	05/01/2008	
	☐	Cindi Example		✓	✓	Policy Letters	WIP	Draft	Cindi Hernandez	08/06/2008	
	☐	Copy of BC Proposal with Demog		✓	✓	Proposal	Commercial Proposal	Draft	Betsy Cormier	08/11/2008	
	☐	Copy of BC XDTI Commercial Pro		✓	✓	Policy Letters	Commercial Proposal	Draft	Betsy Cormier	08/26/2008	
	☐	Copy of XDTI Commercial Propos		✓	✓	Proposal	Commercial Proposal	Draft	Admin Nexsure	05/10/2008	

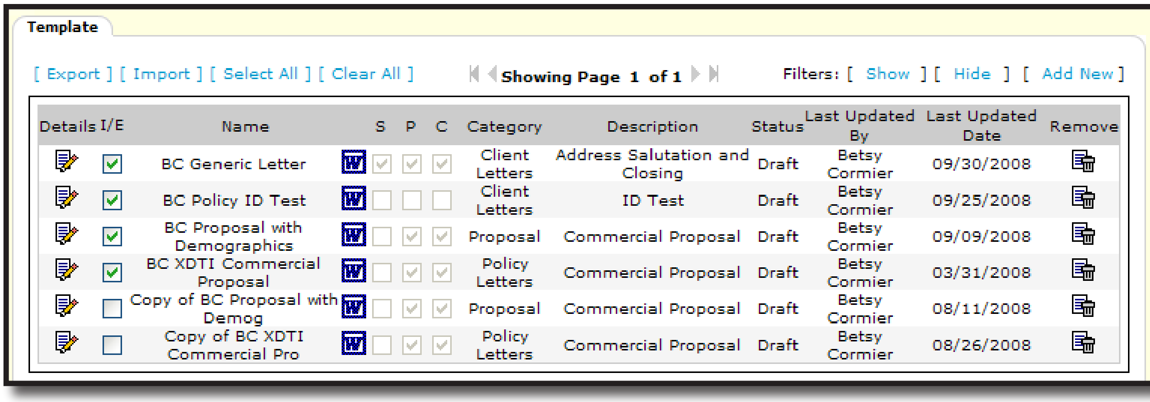
Select the document templates to export by placing a check in the **I/E** check box next to the document template to be exported. The option to select all document templates at once is available by clicking the **[Select All]** link. Clicking the **[Select All]** link will select all documents on all pages if there is more than one page of document templates. To clear all selections, click the **[Clear All]** link.

Template

[Export] [Import] [Select All] [Clear All] **Showing Page 1 of 3** Filters: [Show] [Hide] [Add New]

Details	I/E	Name	S	P	C	Category	Description	Status	Last Updated By	Last Updated Date	Remove
	☑	BC Generic Letter	✓	✓	✓	Client Letters	Address Salutation and Closing	Draft	Betsy Cormier	09/30/2008	
	☑	BC Policy ID Test				Client Letters	ID Test	Draft	Betsy Cormier	09/25/2008	
	☑	BC Proposal with Demographics		✓	✓	Proposal	Commercial Proposal	Draft	Betsy Cormier	09/09/2008	
	☑	BC XDTI Commercial Proposal		✓	✓	Policy Letters	Commercial Proposal	Draft	Betsy Cormier	03/31/2008	
	☑	BH HO Schedule	✓	✓	✓	Schedules	BH HO Schedule	Draft	Beth Harris	07/24/2008	
	☑	BH MED PROLIAB	✓	✓	✓	Schedules	BH MED PROLIAB	Draft	Beth Harris	05/01/2008	
	☑	Cindi Example		✓	✓	Policy Letters	WIP	Draft	Cindi Hernandez	08/06/2008	
	☑	Copy of BC Proposal with Demog		✓	✓	Proposal	Commercial Proposal	Draft	Betsy Cormier	08/11/2008	
	☑	Copy of BC XDTI Commercial Pro		✓	✓	Policy Letters	Commercial Proposal	Draft	Betsy Cormier	08/26/2008	
	☑	Copy of XDTI Commercial Propos		✓	✓	Proposal	Commercial Proposal	Draft	Admin Nexsure	05/10/2008	

Use the **[Show]** link to narrow the list of document templates for selection. Individually select document templates for exporting by manually placing a check mark in the **I/E** check box if only certain document templates are to be exported. Using the **[Select All]** link will select all document templates for exporting whether or not they are displayed.

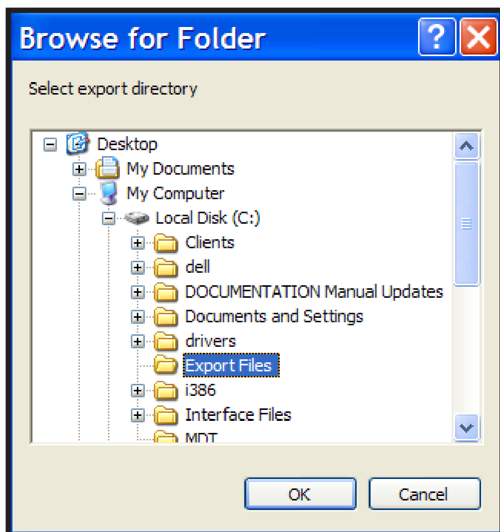


Template

[Export] [Import] [Select All] [Clear All] Showing Page 1 of 1 Filters: [Show] [Hide] [Add New]

Details	I/E	Name		S	P	C	Category	Description	Status	Last Updated By	Last Updated Date	Remove
	☑	BC Generic Letter	W	☑	☑	☑	Client Letters	Address Salutation and Closing	Draft	Betsy Cormier	09/30/2008	
	☑	BC Policy ID Test	W	☐	☐	☐	Client Letters	ID Test	Draft	Betsy Cormier	09/25/2008	
	☑	BC Proposal with Demographics	W	☐	☑	☑	Proposal	Commercial Proposal	Draft	Betsy Cormier	09/09/2008	
	☑	BC XDTI Commercial Proposal	W	☐	☑	☑	Policy Letters	Commercial Proposal	Draft	Betsy Cormier	03/31/2008	
	☐	Copy of BC Proposal with Demog	W	☐	☑	☑	Proposal	Commercial Proposal	Draft	Betsy Cormier	08/11/2008	
	☐	Copy of BC XDTI Commercial Pro	W	☐	☑	☑	Policy Letters	Commercial Proposal	Draft	Betsy Cormier	08/26/2008	

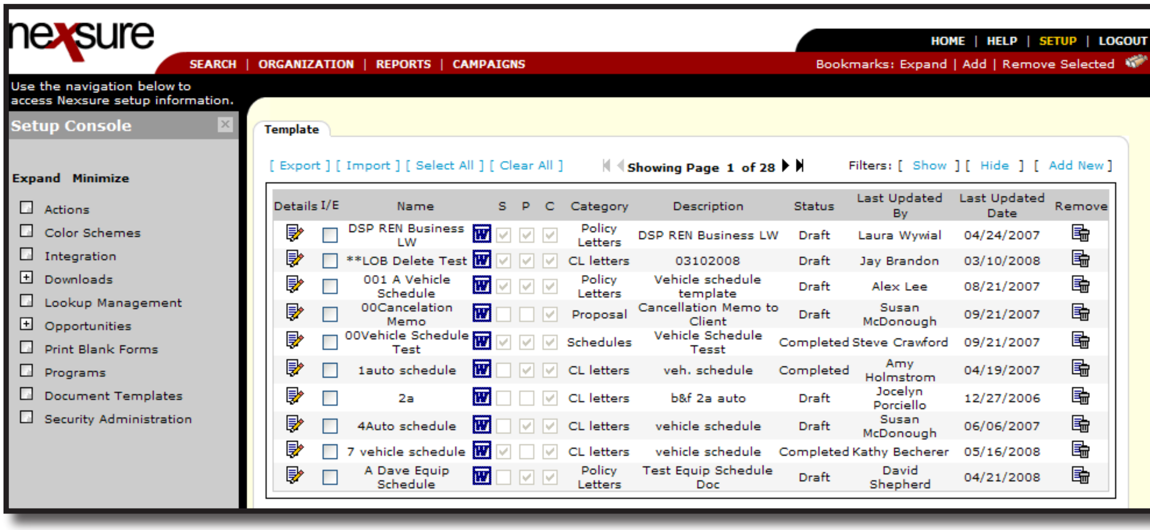
When the document templates to be exported are selected, click the **[Export]** link. Select the export directory folder in the **Browse for Folder** dialog box. Click **OK** to continue.



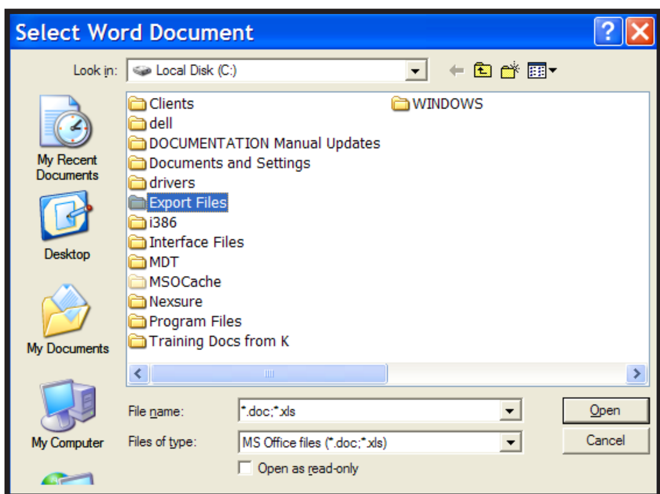
The exported files will remain in the folder until they are deleted by the user.

HOW to Import Document Templates

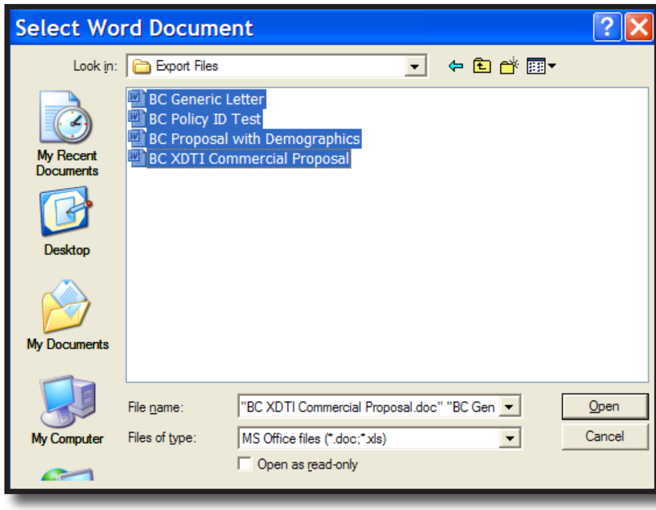
From the target organization, click **SETUP** on the **Utility** menu. The **Setup Console** is displayed. In the **Setup Console**, click **Document Templates**. The **Template** tab is displayed.



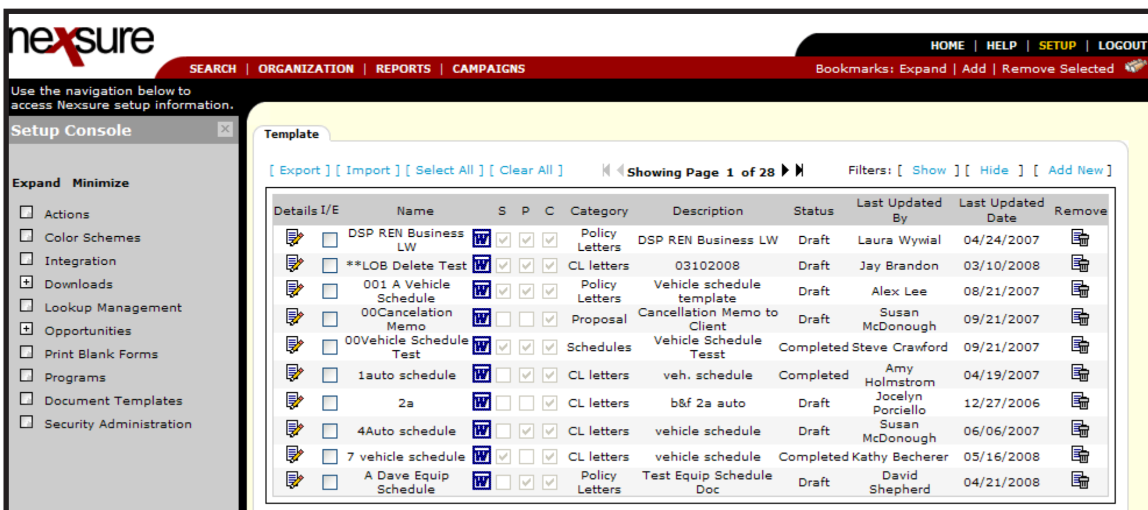
Click the **[Import]** link. The **Select Word Document** dialog box displays. Browse to and select the export directory folder that holds the exported files. Click **Open** to continue.



Select all document templates to be imported. Press and hold the **Shift** key and click to select all document templates in a range or press and hold the **Ctrl** key to click and select multiple files.



If a Document Integration Category from the source organization is not found in the target organization, a warning message displays and the import fails. The warning message will display for each missing category until all have been added to the target organization's Document Integration Category in Lookup Management. For help adding items to **Lookup Management**, refer to "Lookup Management", in Chapter 6 of this manual.



Click **[Import]** on the **Template** tab to start the import process again if **Category** errors were found. The **Select Word Document** dialog box displays. Browse to select the export directory folder that holds the exported files. Click **Open** to continue.

Select all document templates to be imported. Press and hold the **Shift** key and click to select all document templates in a range or press and hold the **Ctrl** key to click and select multiple files. The import process will complete and display the **Template** tab. The imported templates are listed and available for use.

Notes