



Working with Report Templates

This document provides instructions for creating and using templates to auto-populate text and significantly reduces typing time when creating new reports.

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Using Templates

A template contains default text applicable to a report. Default text can be edited in the new report.

Create new templates for each appraiser, client, service area, appraisal type, or for any other purpose.

Creating Templates

1. Click **File > New**, or click the **New Report** icon () , or press **CTRL+N** on the keyboard.
2. Enter the *Filename for New Report* and click **New**.

NOTE: Report filename is not the Template's name.


3. Select the applicable *Report Pak*. Select **<none>** in *Report Template*. Select the *Picklist* (the *Default Picklist* may be used), and click **OK**.
4. Enter data to be applied to future reports. Enter data in the main form i.e., 1004 Single Family 2005, and in any other components (Invoice, Letter of Transmittal, etc.) as needed.

NOTE: Click **Options > Report** to select default report options. Report Options include global settings for the Addendum, carry forward text, market grid adjustments, and other options. Select options for photos, data fonts, firm information, numeric options, signatures, the Title, the Invoice, and other forms in the Template.

5. Click **File > Save As > Template**.
6. Enter the *Description* (name) of the template and click **OK**. The template is available the next time a report using the selected *Report Pak* is created.

NOTE: The default template location is ... \Program Files\ACI32\Templates. Templates are identified by an .ACT file extension.

Editing Templates

1. Click **File > Template > Edit**.
2. Select the applicable *Report Pak*, select the template to edit, and click **OK**.
3. Edit the template data.
4. Click **File > Save**, or click the **Save** icon () , or press **CTRL+S** on the keyboard to save changes.

TIP: When in a report, click **File > Save As > Template** to save a copy of the current report as a template.

5. Click **File > Close** or press **CTRL+F4** on the keyboard to close the template file.

Associating Templates

Share templates across a network using the associate template feature. Save template files in one location making template management easier; perform changes to a template once, and associate individual computers to the shared templates.

1. Click **Options > Environment > File Locations**.
2. Select *Templates* and click **Modify**. Browse to the network (shared) file location and click **OK**.
3. Click **OK** to save changes and exit *Environment Options*.
4. Click **File > Template > Associate**.
5. Select a template and click **OK**.
6. Select the applicable *Report Pak*, enter the *Name* of the associated template, and click **OK** to save.

Importing Templates

Import a template from another computer, from a network location, or from a disk or storage device.

1. Click **File > Template > Import**.
2. Select *ACI Report Template* under *Files of Type*. Browse to the file storage location, select a template file, and click **OK**.
3. Select the applicable *Report Pak*, enter the *Name* of the imported template, and click **OK**.

Exporting Templates

Export a template to another computer, to a network location, or to a disk or storage device.

1. Click **File > Template > Export**.
2. Select the applicable *Report Pak*, select the template, and click **OK**.
3. Select *ACI Report Template* under *Files of Type*. Browse to the file storage location, select a template, and click **Save** to export the template.

Deleting Templates

1. Click **File > Template > Delete**.
2. Select a template and click **Delete**.
3. Click **Yes** to confirm deletion, or click **No** to cancel.

CAUTION: Deleting a template from one computer deletes the template from the network if templates are shared on a network. Other users will see the template name in the templates list. However, the template is not available for report creation.