

Coach's Office Pro Playbook – Template Builder

The Coach's Office pro playbook comes with a special template builder that allows you to create customized page templates and modify the existing templates.

Create a Template – Quick Steps

1. In the playbook program, click *Create Template* in the tool bar. (fig. 63)
2. Click on a template in the left side of the window. The newly created template will be added after it.
3. Click *Insert Template* in the tool bar. A title row (narrow white box) is added to the template space to the right of the selected template. (fig. 64)
4. Click in the new template space with the title row. (fig. 65)
5. Click on the grid area on the right side of the window.
6. Draw the template boxes. In the tool bar, choose the number of rows and columns for the new template, not including the title row. Click *Draw Boxes*. (fig. 65a, b)
7. Move the boxes to the desired location on the grid, such as the top left under the title row. (fig. 66)
8. Size the boxes. (fig. 67-68)
9. Click *Save Template*. (fig. 70)
10. Click *Return to Playbook*. (fig. 72)

Detailed Instructions

1. Click *Create Template* in the tool bar. (fig. 63)

The program switches to the Template Builder window, which is divided into two columns. In the left column are the current templates, and the right column is the template layout grid.

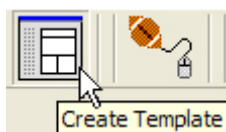


figure 63

2. Choose the new template location. For example, click the last template.

The new template will be placed to the right of the selected template. The selected template has a red box around it, and the template layout displays in the layout grid on the right. (fig. 65)

3. Insert a template. Click *Insert Template* in the tool bar. (fig. 64)

To the right of the previously selected template is the single row box of the new template. It looks like a thin white box. All new templates begin with this single row that can later be defined as a word processing box for the page title. However, if the template does not require a title row, as in the case of creating a cover page, this first row can be sized or deleted.

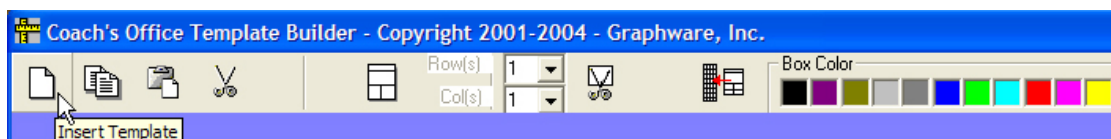


figure 64

From left to right, the Template Builder tool bar tools are:

- Insert Template
- Copy Template
- Paste Template
- Remove Template
- Draw Boxes
- Number of Rows & Columns in a Box
- Remove Box
- Save Template
- Box Color
- Return to Playbook

4. Click in the new template space in the left column.

5. Click in the grid area in the right column. (fig. 65)

The new template space is defined as the entire rectangular area that the template will occupy, not only the title row. Click anywhere in the rectangular area. A red outline is around the template. Next, click in the grid area in the right column, where the remainder of the template is built. The title row displays at the top of the grid layout.

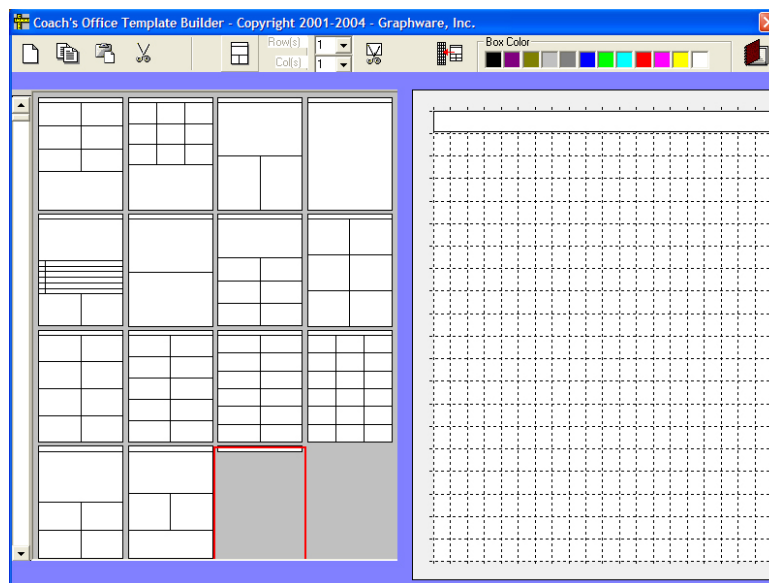


figure 65
(Your templates may be different.)

6. Draw template boxes. In the *Row(s)/Column(s)* dropdown in the tool bar, enter rows and columns. Click *Draw Boxes*. (fig. 65a, b; fig. 67)

The rows and columns form boxes. In this example, the boxes are two rows by two columns. The box is in the center of the grid.

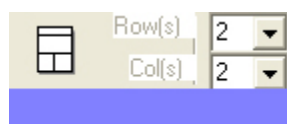


figure 65a

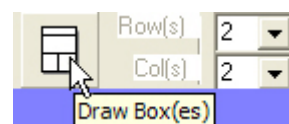


figure 65b

7. Move the boxes to the desired location. Click and hold down the mouse in the boxes while dragging them to the top left corner under the title row. (fig. 66)

While creating the template, these four boxes are treated as a group box and move together. As part of a page template in a chapter, each box will be defined individually.

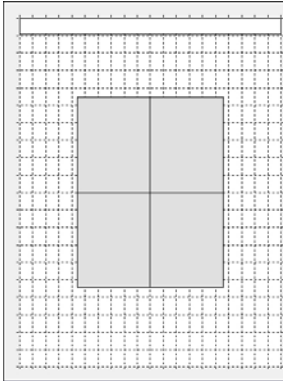


figure 66

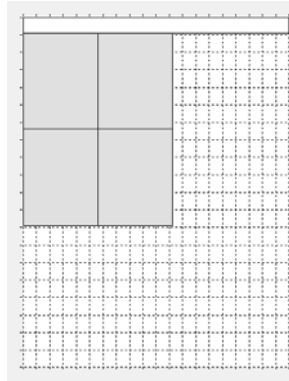


figure 67

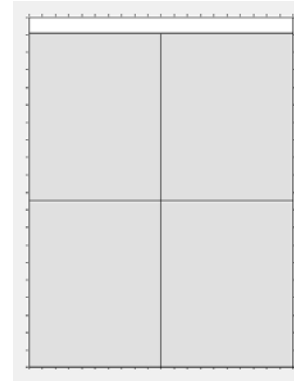


figure 68

8. Size the boxes. Click the bottom, right corner of the boxes and drag (as a group) to fill the screen. (fig. 67, 68)

When the mouse is near a corner or side edge, the bi-directional arrows display. The arrows perform the same as they do for the insert text box resizing. By dragging the corner bi-directional arrows, the boxes stretch in width and length at the same time. If necessary, continue to adjust until the box fills the grid. The new template is ready to be saved to the list.

9. Save the template. Click *Save Template* in the tool bar. (fig. 69)

The newly created template is added to the template listing in the left column of the window. The template has a red box around it, and on the right side of the window, the final template displays. This template is now available for selection the next time a page is added to a chapter. (fig. 70)

As templates are added, and the template window is filled, a scroll bar appears at the left. Scroll to select the desired template.

10. Return to the playbook program. Click *Return to Playbook* in the tool bar. (fig. 71)

The program returns to the playbook.

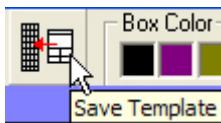


figure 69

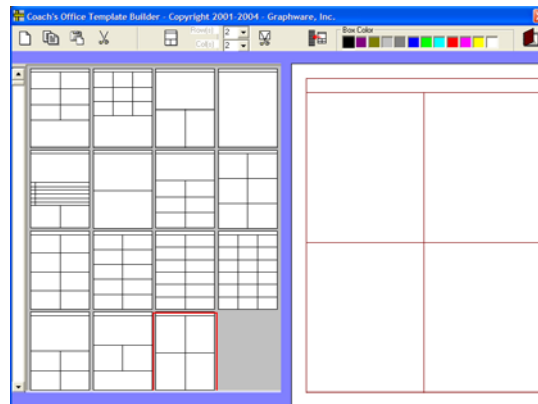


figure 70

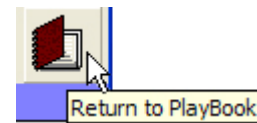


figure 71

Modify a Template

An existing template can be modified in the Template Builder window.

1. In the playbook program, click *Create Template* in the tool bar. The two-column Template Builder window appears.
2. Choose to modify a template, copy of a template, or remove a template. Click the template.
 - To modify a copy of a template, click to select the original template.
 - Click *Copy Template*. (fig. 72)
 - Click the gray space after the last template.
 - Do not click on a template and then *Paste Template*, because that template will be replaced with the pasted one.
 - Click *Paste Template*. (fig. 73)
 - Select the newly pasted template. The layout appears in the grid area.
 - This template can now be modified. Go to #3 below.
 - To modify a template, select the template. The layout appears in the grid area.
 - This template can now be modified. Go to #3 below.
 - To remove/delete a template from the list, select the template. Click *Remove Template*. (fig. 74) This is not the same as “cut.” The removed template is not held in memory to be pasted to a new location. It is completely deleted.
3. What modification is being made?
 - Remove a box.
 - In the template layout on the right, click the box to be removed. Notice that the box may be several rows and columns and not an individual box, depending on how the box was created.
 - The box turns gray. Click *Remove Box*. (fig. 75)
 - The box is removed and the grid shows through where the box was.
 - Make adjustments to the remaining boxes to fill the length and width of the entire template layout as desired.
 - *Caution:* Be careful not to overlap the boxes. This is the most common mistake when building the templates.
 - Review the *Create Template* details above for help.
 - Move and size boxes. Add boxes. Click *Draw Boxes*. (fig. 65a, b)
 - Add boxes side by side as individual boxes.
 - Or add boxes as a group with multiple rows and columns.

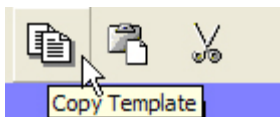


figure 72

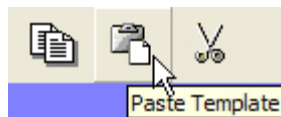


figure 73

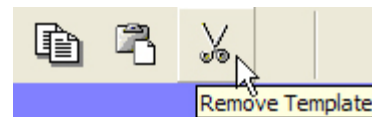


figure 74



figure 75

4. Color box borders. Whatever color is applied to the template will display in the playbook page.
 - o Click the template on the left and then click the template layout on the right.
 - o Click a color in the *Box Color*. (fig. 76)
 - o Click the box(es) in the template to receive the colored border.



figure 76

5. Click *Save Template*.
6. Click *Return to Playbook*.