

## QRA: Document Editor Fundamentals

Welcome to the Document Editor Tool. With this guide, you will be able to create, edit, save and utilize document templates throughout Lumens. The Document Editor functionality allows you to create Instructor Contracts, Contract Training Proposals/Contract, Invoices, Credit Memos, and Proof-of-Completion Templates.

### Example: Invoice Template

<b>Anywhere University</b> 3892 Hawkins Street Blaine, MN 58829  Phone: 789-887-8285		<b>INVOICE</b>  INVOICE #: «MergeFields.InvoiceNumber» DATE: «MergeFields.InvoiceDate»
<b>TO:</b> «MergeFields.ARAccountName» «MergeFields.ARAddress» «MergeFields.ARCity», «MergeFields.ARStateProvince» «MergeFields.ARZipPostalCode»		
DESCRIPTION	COST	
«ClassName», Class ID: «ClassID» Class Start/End Dates: «ClassStartDate» - «ClassEndDate»	«RegistrationCost»	
TOTAL		«MergeFields.InvoiceAmount»

### TIPS:

- No additional program to download or install on your PC or MAC
- Compatible with all browsers (however, if using IE, compatibility view MUST be turned off)
- Document Editor tool bar resembles the toolbar in Microsoft Word.

### Example: Finalized Invoice

<b>Anywhere University</b> 3892 Hawkins Street Blaine, MN 58829  Phone: 789-887-8285		<b>INVOICE</b>  INVOICE #: 849 DATE: 05/25/2018
<b>TO:</b> 3m Corporation 4992 102nd Ave NW White Bear Lake, MN 55295		
DESCRIPTION	COST	
Confined Space Non-entry Rescue, Class ID: 23555 Class Start/End Dates: 06/21/2012 - 06/22/2012	\$315.00	
Summer Vineyard Management 1, Class ID: 27265 Class Start/End Dates: 03/05/2018 - 03/12/2018	\$54.64	
TOTAL		\$369.64

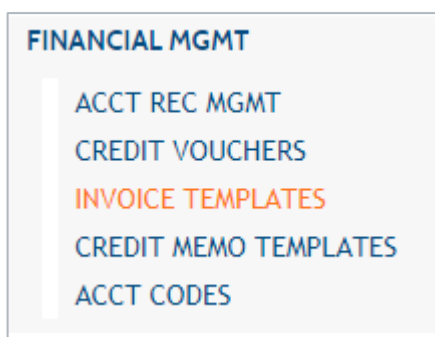
- If your original is a Word Document, you can use Copy & Paste to jump start the creation of a new template.

We recommend each organization designate only 1-2 users who will create and edit all templates.

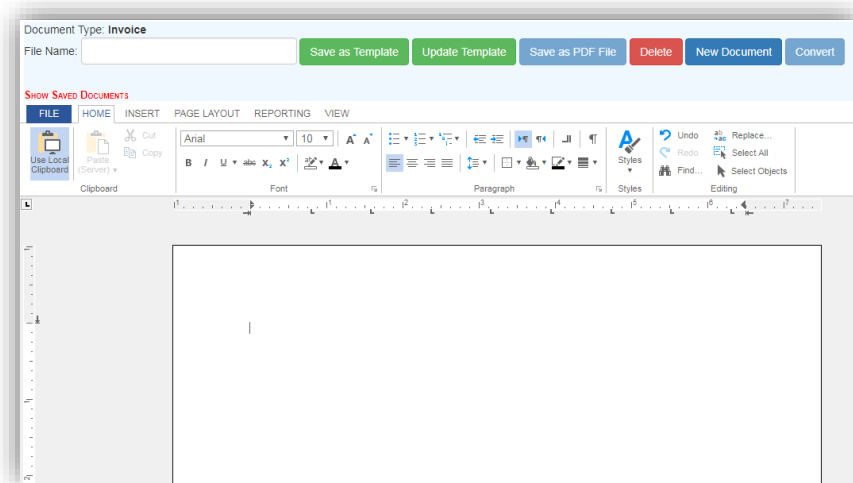
The Document Editor Tool can be opened from several places within Lumens based on your current need and based on your current configuration.

**For Example:**

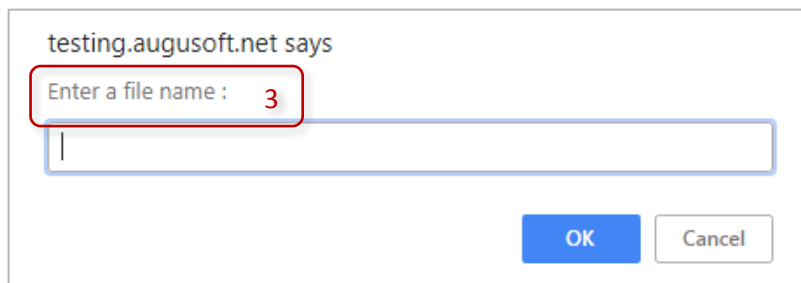
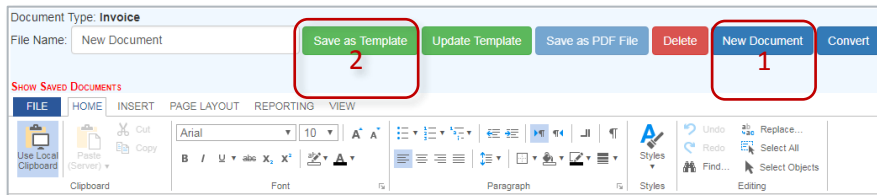
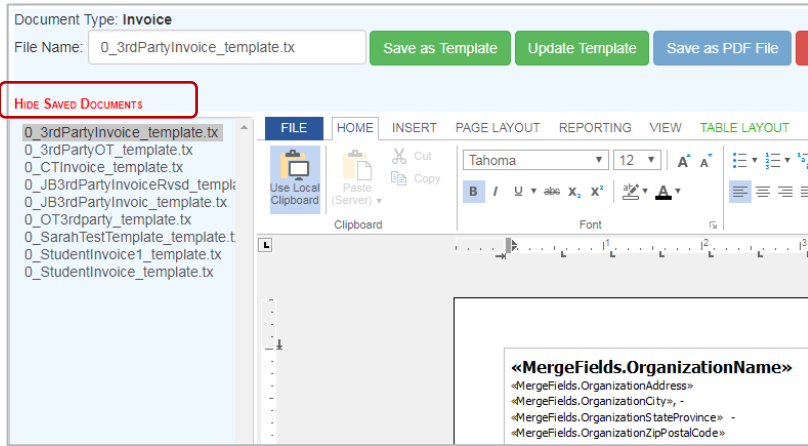
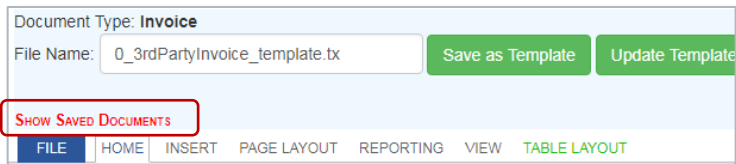
If you would like to work with:	Use this path to open the Document Editor:
Instructor Contracts	Instructors > Instructor Contracts
Invoices	Financial Mgmt > Invoice Templates
Proposals	Contract Training > Proposals > Create Default Template
Contracts	Contract Training > Contracts > Create Default Template
Credit Memos	Financial Mgmt > Credit Memo Template
Class Proof of Completion	Course Mgmt > Class Templates
Certificate Proof of Completion	Course Mgmt > Certificate Templates



**1. LAUNCHING DOCUMENT EDITOR:** *In this example, we will be working with Invoices*



**2. NEW WINDOW LAUNCHES:** Create new templates or access existing templates.



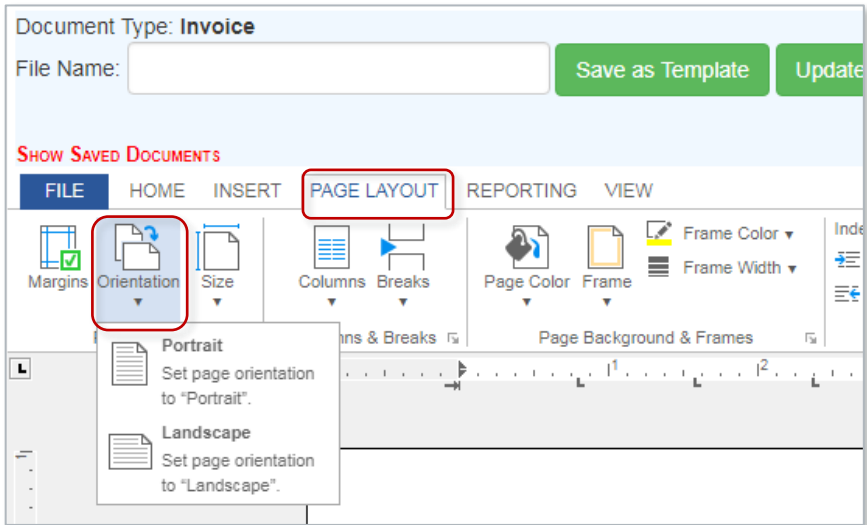
**3. ACCESS EXISTING TEMPLATES:** Once the program opens, you have an option to view, modify, add and save templates. To view a list of existing templates, click on Show Saved Documents, then select the template you wish to modify.

**4. CREATE A NEW TEMPLATE:**

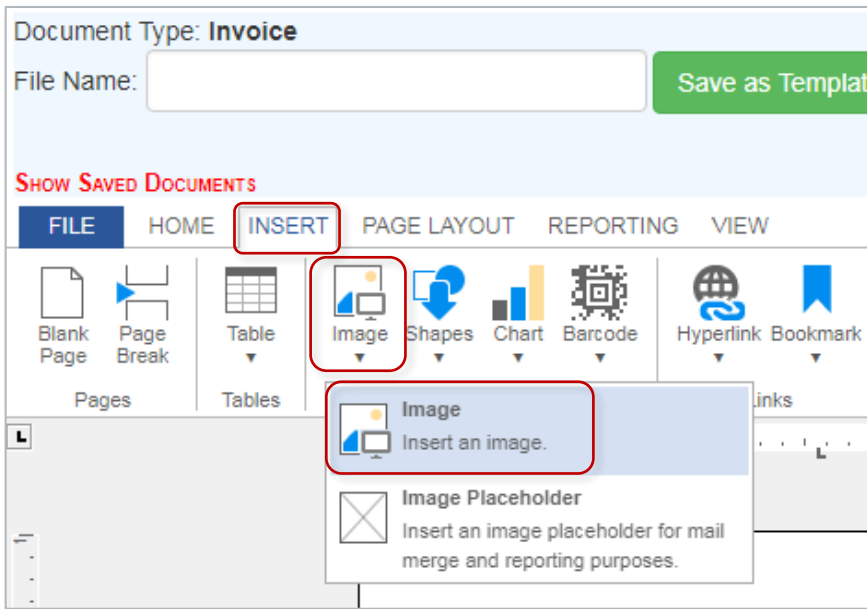
- Click on **New Document** and design your template.
- Click **Save as Template**, and a pop up window will appear to name the template.
- **Enter a File name, click OK.** This will save this document as a new template appearing in the Show Saved Documents list.

*NOTE: Files cannot be re-named. If you need to rename a file, click on the file name and complete steps 2 & 3. Once the new file is created, delete the file with the incorrect file name.*

**5. DELETE A TEMPLATE:** If you wish to delete a template that is no longer being used, simply select your template > click on the red DELETE button at the top of your screen.

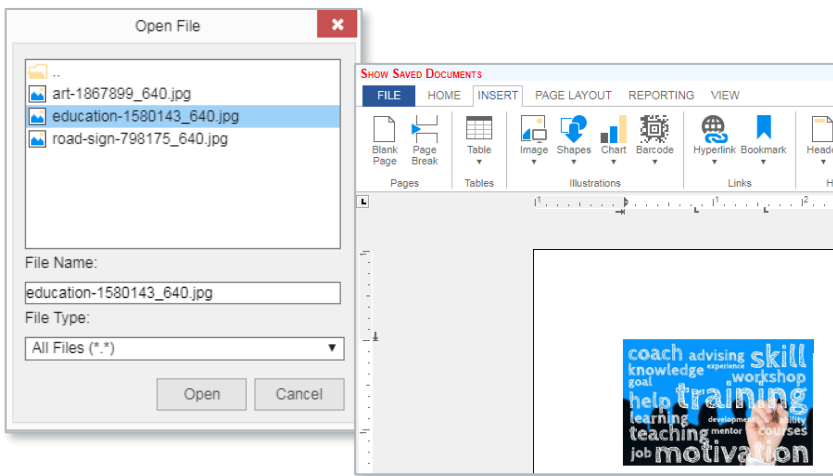


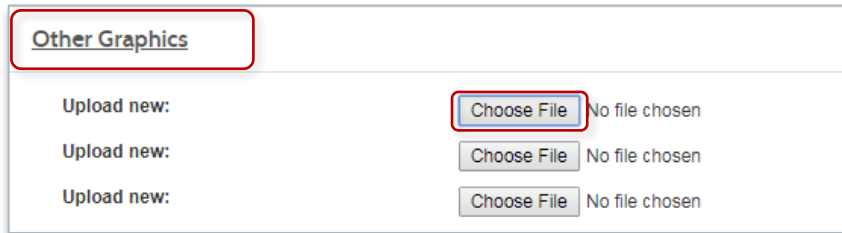
6. **PAGE LAYOUT:** To change your page layout to Portrait or Landscape click on PAGE LAYOUT > Orientation > select either Portrait or Landscape. Additional Page Layout features include margins, creating columns, controlling page breaks and page borders.



7. **IMAGE / LOGO:** Images may be inserted into a template using either of two methods – Copy & Paste from another document or from existing graphics on the server.

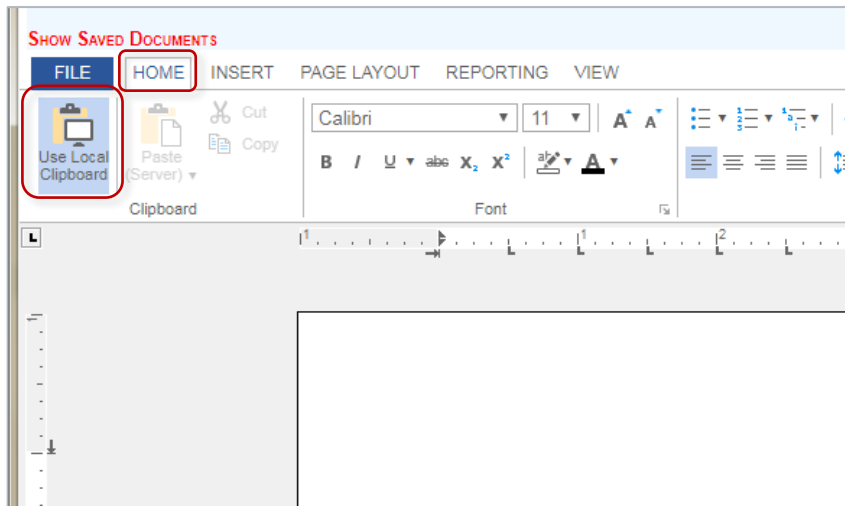
*NOTE: 'Paste' functionality is available in the document editor only by using CTRL-V. (right click-paste is not an option)*





If you don't see your graphic on the server and you would like to add it, go to SYSTEM OPTIONS > Site Configuration > Graphics > Other Graphics

Click Choose File to browse your computer or network for the image and click Submit, making the image available for use throughout your Lumens website.



**8. COPY & PASTE FROM WORD DOCUMENT:** You may also copy and paste text from a Word Document. Once you have *copied* the text from the Word document, in the document editor go to HOME.

- By default, Use Local Clipboard is blue, meaning you have the option to paste.
- Position cursor in the document where the text should appear. Use CTRL-V to paste the text into the document editor.