

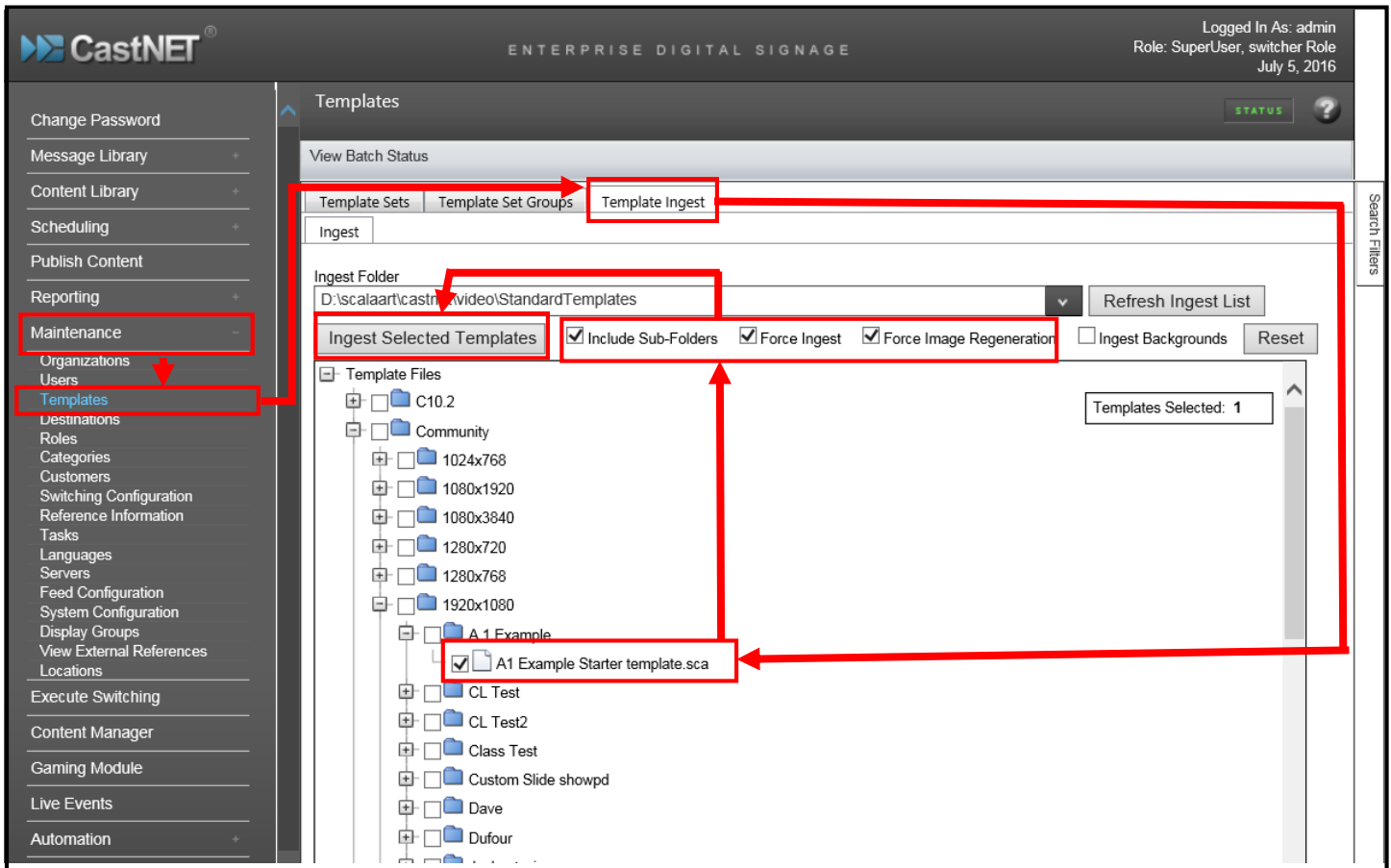
INGESTING TEMPLATES AND ASSIGNING TO ORGANIZATIONS

To ingest one or more Templates, follow these steps:

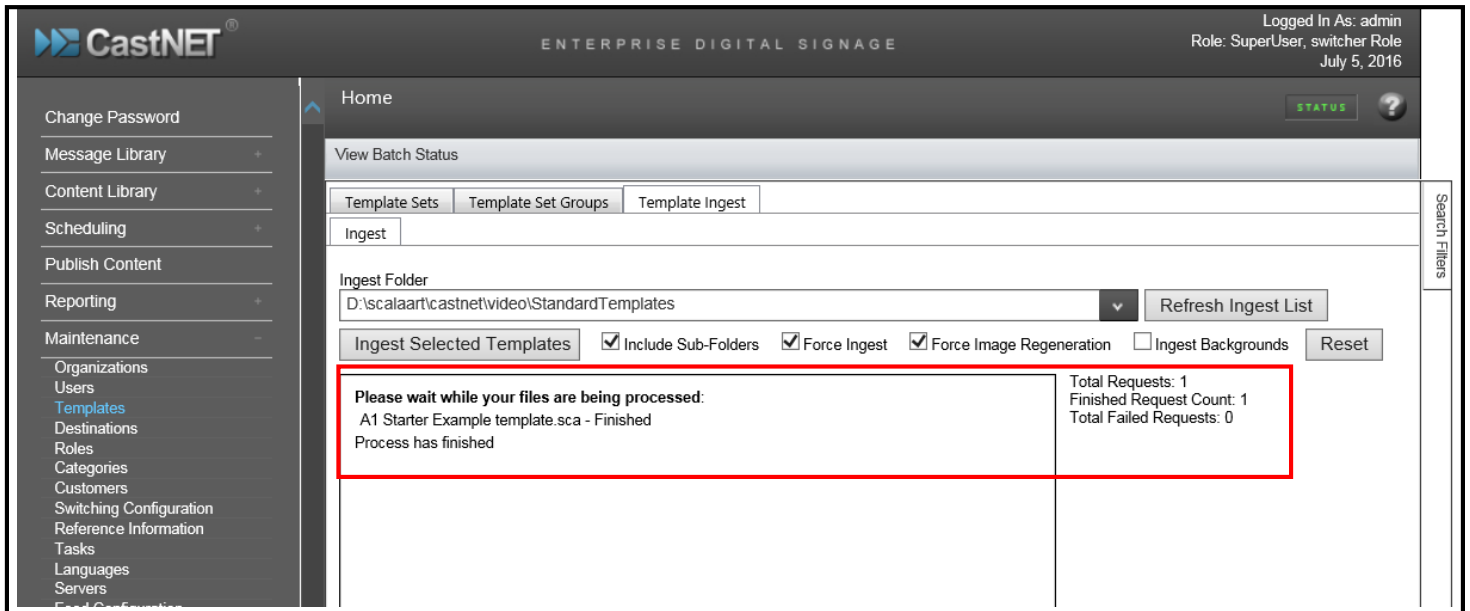
1. Select Maintenance>Templates.
2. Select the Template Ingest Tab.
3. Navigate to the location where the Template to be ingested is stored.

Note: If you desire to ingest all the Templates inside a Template Style Folder, select the check box next to that style. If you want to pick and choose your Templates, open the folder tree and select from any of the Templates in that style.

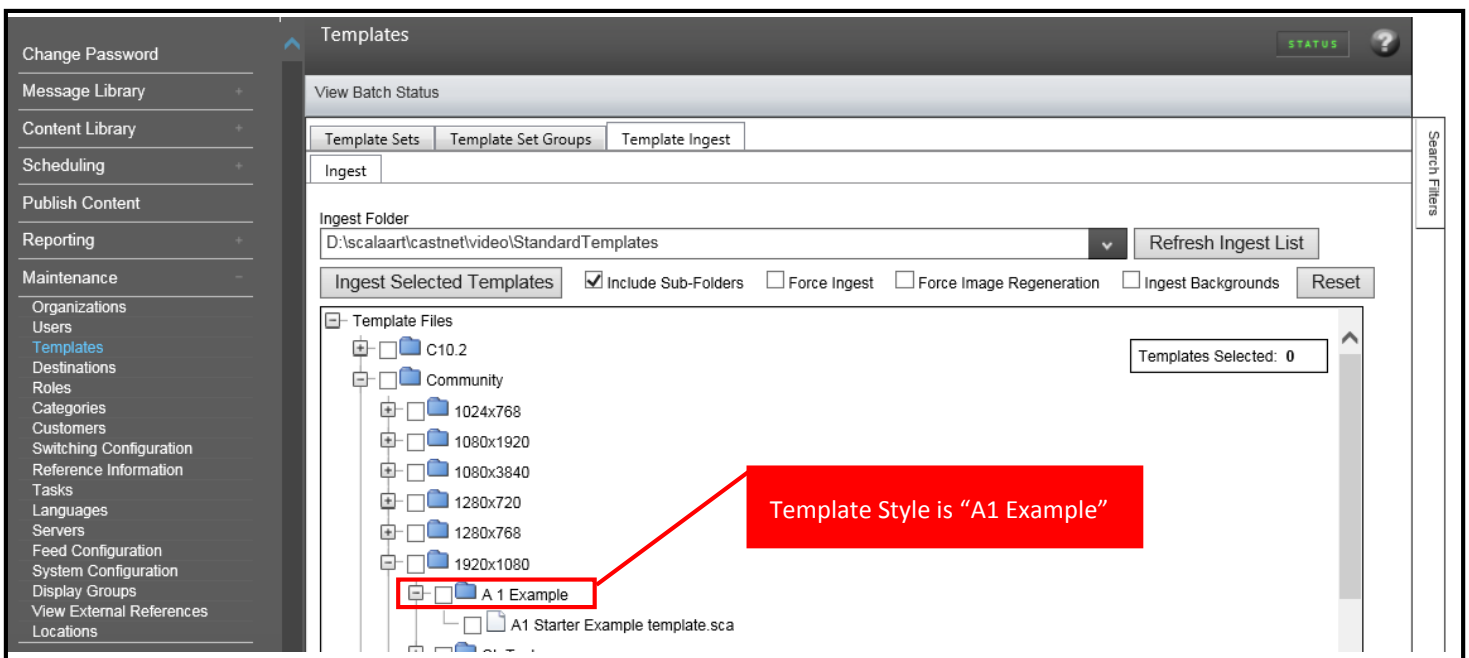
4. Select the check box next to each Template to be ingested.
5. Select the box next to Include Sub-Folders, Force Ingest and Force Image Regeneration.
6. Click the "Ingest Selected Templates" button.



7. Review the ingest process results to ensure that the ingestion of template was successful. If the process failed, you would see a message highlighted in yellow and you would need to correct the issue and go through the ingestion process again.



Note: Template Style is the name of the folder that contains your Template. You will use this when you are assigning the template or templates to organizations. In the example below we see the template style is **A1 Example**.



ONCE A TEMPLATE HAS BEEN SUCCESSFULLY INGESTED THE TEMPLATE NEEDS TO BE ASSIGNED TO THE ORGANIZATIONS THAT WILL BE USING THE TEMPLATE.

Assigning a template to an Organization.

1. Navigate to Maintenance>Organization.
2. Click on the Organization that you wish to add the Template. In this case it is General Information.
3. Go to the Templates tab.
4. Select the dropdown box in template filters and navigate to the template style of the template.
5. In this case it is A1 Example, then on the right select apply.
6. Select the template or templates that are listed under available templates.
7. Drag the desired Template from “Available Templates” Column to “Authorized Templates” Column.
8. Go to the Work Bar and select Save command.

Your template has now been assigned to this Organization and is now ready to be used. If you wish the Template to be used in multiple Organizations, you would go through this process until the Template was added to all the desired Organizations.

