



# Pro Playbook Template Builder Instructions

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# Playbook Template Builder

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

The last section of instructions is for creating a presentation template to be used with Coach's Office slideshow and video playbook programs.

## Backup the Playbook before Proceeding

Make an external backup of your playbook database file before changing the page templates. (See website Support → Back Up & Restore Files.)

The page templates are part of the playbook file. That means if you mistakenly overwrite, modify, or delete templates, they can only be brought back through a playbook file restore or recreated in the playbook template builder. Be careful that your playbook backup file includes your most recent work or you will lose it in the restore.

## Create a New Template

Create a new template in the template selection.

- Click *Create Template* in the pro playbook toolbar. (fig. 1)

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

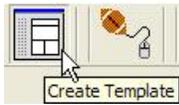


fig. 1



fig. 2

### Template Builder Toolbar

From left to right, the tools are:

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

### Choose Template Location

The new template will be placed to the right of a selected template.

- For example, click the last template. The new template will be placed to the right of it.
- Click *Insert Template* in the toolbar. (fig. 2)
- The new template appears to the right of the selected template. It has a single row that looks like a thin white box. All new templates begin with this single row that will later be defined as a word processing box for the page title. (fig. 3)

- If the template does not require a title row, as in the case of creating a cover page, this first row can be resized.

### Define the Template Box Layout

- Click in the new, red-outlined template space in the left column, and it displays in the right column.
- Click in the grid area in the right column. (fig. 3)

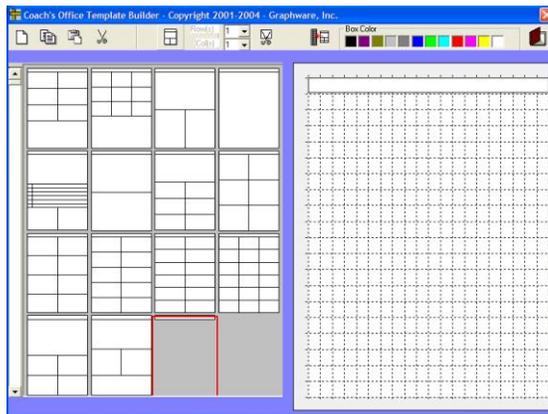


fig. 3

(Depending on the version, your templates may be different.)

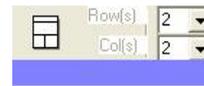


fig. 4a

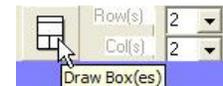


fig. 4b

### Draw Template Boxes

In the *Row(s)/Column(s)* dropdown in the tool bar, enter the number of rows and columns for the new template.

- Enter the number of rows and columns, and click *Draw Box(es)*. (fig. 4a, 4b; fig. 5)
- The box appears in the center of the grid.

### Multiple Boxes

In our example, the page will actually have 2 boxes: title box and 2x2 box. (fig. 5) As you can see from the other templates, it is possible to have multiple boxes with different configurations of rows and columns.

### Move Box

Move the box by clicking and holding down the mouse in the boxes, while dragging to the top, left corner under the title row. Release the mouse. (fig. 6)

- *Caution:* Boxes can touch, but do not overlap them. Drag the new box as close to the top title box as you can without overlapping it.
- While creating the template, the 2x2 box is treated as a group – not 4 boxes – and moves as one. As part of a page in a playbook chapter, each box will be defined individually as either a word or play box.

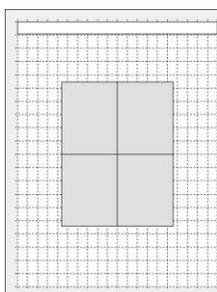


fig. 5

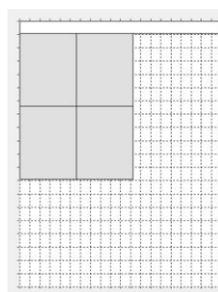


fig. 6

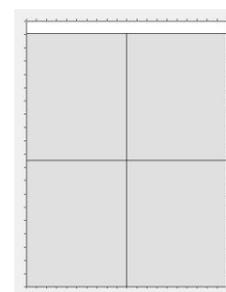


fig. 7

### Size the Box

Click the bottom, right corner of the box and drag to the bottom right to the desired size. (fig. 7)

- When the mouse is near a corner or side edge of the box, the bi-directional arrows display. 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 (for this example).

### *Save the Template*

The new template is ready to save to the list.

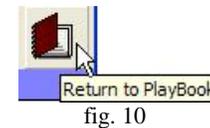
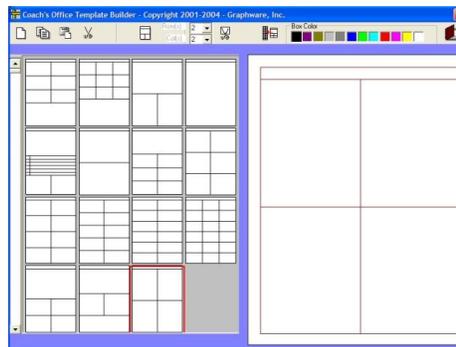
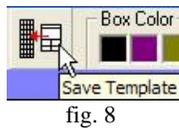
- Click *Save Template* in the tool bar. (fig. 8)
- The newly created template is added to the template listing in the left column of the window. (fig. 9)
- This template is now available for selection the next time you insert a page in a playbook chapter.

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

### *Return to Playbook*

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

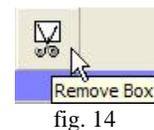
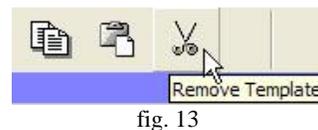
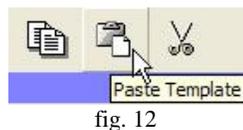
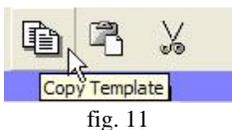
- The program returns to the playbook.



### **Modify a Template**

An existing template can be modified in the Template Builder. Simply copy, paste, and modify.

- Click *Create Template* in the playbook toolbar.
- Click the template you want to modify.
- Click *Copy Template*. (fig. 11)
- Click the open gray space after the last template. If necessary, use the scroll bar on the left to scroll down to an open space.
  - Do not click back on the template. It will be replaced.
- Click *Paste Template*. (fig. 12)
- Select the newly pasted template. The layout appears in the grid area.



What modifications do you want to make?

- Remove a box.

- In the template grid area 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. 14)
- 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 template, as desired.
  - *Caution:* Be careful not to overlap the boxes.
- Move and size boxes.
  - Refer to the instructions above in *Create a New Template*.
- Add boxes.
  - Define rows and columns, and click *Draw Boxes*. (fig. 4b)
  - Add boxes side by side as individual boxes.
  - Or add boxes as a group with multiple rows and columns.
- Add box border color. (See next section.)
- When finished, click *Save Template* in the toolbar. (fig. 8)
- Click *Return to Playbook*.

### Add Box Border Color

By default, the box borders print in black. You can apply a different color to any box. Some coaches choose white as the border, which gives the appearance of no border at all when it is printed.

- Click the template on the left, and then click the template layout on the right.
- Click a color in the *Box Color*. (fig. 15)
- Click a box group, and the color is applied. The color will be visible in the template on the left.
  - If desired, click another box to apply the same color or repeat the process for a new color.
- Click *Save Template*.
- Click *Return to Playbook*.



fig. 15

### Remove Template

There may be a template that you will never use. You can remove/delete it.

- Click the template.
- Click *Remove Template*. (fig. 15)

### Presentation Template

We recommend that you use a presentation template – or simple template – when building a presentation for the slideshow. The slideshow displays about half of the page, so you could use the template with a title box and two large boxes and leave the bottom box empty or create one with only the title box and a box under it. (figs. 16, 17)

Some coaches prefer to use a template with multiple boxes and scroll down to discuss other areas of the page. Do whatever is best for you.

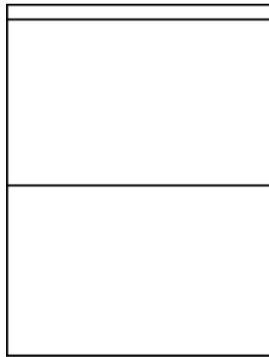


fig. 16

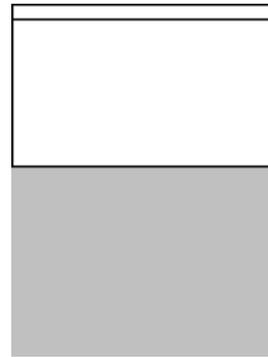


fig. 17

### Create a Template

This template is easy to create, and fits very well in the slideshow screen. For more detailed instructions of how to create a template, see the same topic at the beginning of this document.

- Click the template that you want the presentation template added after in the selection window.
- Click *Insert Template* in the tool bar. (fig. 2)
- The new template appears to the right of the selected template. It has a single title row. (fig. 3)
- Click in the red outlined new template area, and the template appears in the grid area. (fig. 3)
- Click in the grid area.
- Define a new box to be 1 row and 1 column, and click *Draw Box(es)*. (fig. 4a, fig. 4b)
- Move the box to the top, left under the title bar. Be careful not to overlap the top box.
- Click and drag the bottom, right corner to the width of the grid and down to barely over the 9<sup>th</sup> grid row. (fig. 18)
  - There are 20 grid rows, so the two boxes make up less than half the page. We have found that this size fits perfectly in the slideshow screen.
- Click *Save Template* in the toolbar. (fig. 8)
- The template is ready to choose the next time you insert a page into a playbook chapter. (fig. 17)

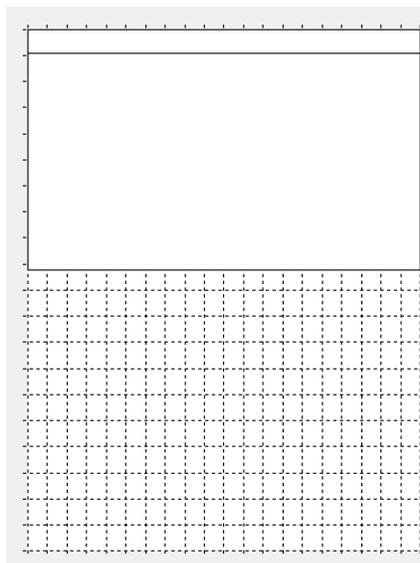


fig. 18