

QUIRE

Template Optimization Quick Reference Guide

WHAT IS TEMPLATE OPTIMIZATION

AND WHY SHOULD I DO IT?

Template Optimization is the use of Quire's built-in tools to make your Template the best possible fit for your business process and your client's goals. Take the time to do it because it will **reduce time and effort** (and improve consistency) for **every single Report** produced from the Template. This Quick Reference Guide walks you through it!

GETTING STARTED

Have a sample Report (with Figures and Appendices) to clarify the goal.



IDENTIFY TEXT

In your Microsoft Word Template, add markups to uniquely identify text that should be:

- WordBank Items
- Report Tags
- Locked Text
- Boilerplate Text



Contact **Quire** for a markup guide!



IMPORT

Create your Quire Template by importing your Word Template.

PRO TIP: Use header indicators in Word (H1,H2, etc.) to automatically create separate Sections upon import.

STEP ONE



TEMPLATE SETTINGS

Explore tabs in the **Template Settings** window and adjust settings as needed.

All items in Step 1 are accessible in the **Template Settings** window.



FORMATTING

Use the **Styles** tab to assign applicable formatting.

Contact **Quire** if you don't have the necessary **Packages**!



ADD ITEMS

In the **Packages** tab, add items you need, such as:

- Project Summary Table
- Environmental Data Ordering and Integration (ESA Reports)
- XML/JSON (Fannie, Freddie, CLOSER)



ATTACHMENTS

Set up placement of attachments with the **Appendix** tab.

When there is styling overlap, each assigned Style in the list overrides all previous Styles. (lower in list = higher in precedence)



ATTACHMENTS

Set up placement of attachments with the **Appendix** tab.

STEP TWO



SET UP THE TABLE OF CONTENTS

Use the **Edit Hierarchy** tool to organize Sections and Sub-Sections. Drag-and-Drop Sub-Sections to make them appear in the intended order below the appropriate Section.

PRO TIP: Make hierarchy changes one at a time until you are familiar with the tool.



REMOVE DUPLICATE CONTENT

Avoid repeating the same information throughout your report - say things once! (e.g., Site information, Findings etc.)

It's easy and effective to display helpful images in context. **A picture is worth a thousand words!**



ORGANIZATION

Ensure presentation enables easy client business decision. Place actionable info up front.



DATA PRESENTATION

When advantageous:

- Present data in a SmartTable instead of narrative.
- Present data in hierarchy — high-level at top, detailed below.
- Incorporate Image Sections into the Report body.



ADD APPENDICES

Add appropriate Appendices. Quire offers PDF, Gallery, and File Repository Appendices.

STEP THREE



CONTENT AND FILES

Follow your markup guide.



REPORT TAGS

Identify and insert Report Tags.



WORDBANK

Convert appropriate text to WordBank Items.



KEEP CONTENT GENERAL

Remove site-specific text that must always be deleted.

PRO TIP: WordBank Items can be created on the fly!



This is what unlocked text looks like.



This is what locked text looks like.

LOCKING

Lock all text that shouldn't change.

PRO TIP: You can convert a Text Section into a specialized Instruction Section that will not appear in your PDF output.



INSERT INSTRUCTIONS

Utilizing instruction sections gets your writers' attention. No deleting required!



BUILD OUT SMARTTABLES

Explore all the settings for columns and rows.



ADD AS NEEDED

- Hidden Sections
- Specialized Sections (e.g., Cost Recs, Data Integration Tables, XML Forms, etc.)
- Map Templates for Appendices

WELL DONE!

YOU OPTIMIZED YOUR TEMPLATE!
NOW SIT BACK AND ENJOY THE TIME SAVINGS.