



AFS Presentation Designer

General Overview: AFS Presentation Designer

The AFS Presentation Designer™ is a flexible packaging tool designed to combine the best of AFS with the best of the end-user's experience. It dramatically enhances the user's ability to create custom sales presentations and in-force plan administration materials. By integrating AFS output with Microsoft® Word, the user can create customized presentation documents containing actual illustration values with a click of the mouse. The interface for the Presentation Designer is accessible from within MS-Word - just use the right mouse click to bring up the options you need to integrate with the AFS Master System®. The document text is fully at the discretion of the user and can be saved as a presentation template for future proposal presentations or in-force presentations for subsequent years. The user can modify the templates whenever needed. From within the document the user has access to the rich graphing capabilities, font and color selections, and other intricate formatting options offered by Microsoft® Word.

Anywhere within the body of the presentation text, the user can insert from a large selection of available values calculated by the AFS Master System®, regardless of whether that value appears in any of the reports selected to produce illustrations for the case. The user can insert any column available in the AFS Master System®, or even apply mathematical functions to create and insert user-defined columns. Graphs, based on the AFS Master System® columns, may be inserted as well.

The AFS Presentation Designer™ offers the fastest way to create a sales presentation without giving up the accuracy and sophistication COLI producers require.

Getting Started

Creating customized package sales text using the AFS Presentation Designer™ requires the integration of the AFS Master System®, Microsoft® Word, and the AFS Presentation Designer™.

Use this checklist to set up and produce customized package sales text using the AFS Presentation Designer™.

Step 1: Create an AFS Presentation Designer™ Template

Step 2: Create a case in the AFS Master System®

Step 3: Direct AFS Master System® output to Word document

Step 4: Run the case in the AFS Master System®

Step 5: Review the AFS Presentation Designer™ output document

Step 1: Create an AFS Presentation Designer(TM) Template

The template document is created in and modified by Microsoft® Word, and is easily identifiable by the file extension 'AFS'.

The AFS Presentation Designer™ is packaged with several sample templates based on the AFS Master System® Package Wizard output. It may be helpful to begin with these and customize them.

To use an existing AFS Presentation Designer template, simply open the file by clicking [Open](#) on the Standard Microsoft Word toolbar, or by clicking [Open](#) from the [File](#) menu and specify the filename of the template document. Additional instructions on how to create a template begins on page () of this document.

Step 2: Create a case in the AFS Master System®

1. In the AFS Master System® code a master file and/or case file with the plan design desired or modify an existing case.
2. For help on creating or modifying a case, please refer to the On-line Guide to the AFS Master System®.

Step 3: Direct AFS Master System® Output

1. In the AFS Master System®, with the desired case open, click on the [Report Manager](#) button located on the AFS Master Control panel.
2. In the [Report Manager](#), define the individual, composite and miscellaneous reports desired for this case. These are the reports that are available to the AFS Presentation Designer™ and may be integrated into the resulting packaged sales output.
3. In the [File](#) menu, click [Output Selection](#).

4. In the **Output To** box, select **Word Document**. This directs the system output for the case to a Microsoft® Word document that will integrate the AFS Presentation Designer™ template document with the AFS Master System® output.
5. In the **Output File Name** field, enter the path and filename of the Microsoft® Word document that will be created by running this case. The user may type in the path and filename or use the browse button to the right of the field to more easily identify the file. An output file name *must* be specified.

You may enter a filename without specifying a file extension. If none is specified, the MS-Word extension of *DOC* is assumed. If no path is specified, the output file will be created in the AFS Master System® directory. The user may define a new or existing file.

6. In the **Template File Name** field, enter the path and filename of the AFS Presentation Designer™ Template document that will be used when running this case. The user may type in the path and filename or use the browse button to the right of the field to more easily identify the file.

See *Create an AFS Presentation Designer™ Template* for help on how to create such a template.

Step 4: Run the case in the AFS Master System®

1. Before running the case, close down any open sessions of the Microsoft® Word program.



2. In the AFS Master System®, with the desired case open, click on the **Run** button located on the AFS Master Control panel.
3. The **Run Status** window will appear indicating the progress of the case.
4. Once the standard processing has been completed, the message **Template Initialization** will appear in the **Printing Status** section of the **Run Status** Window. This and additional messages will indicate the progress of the processing of the Template document and the integration of system variables and reports with it.
5. When the Run Status window reflects **AFS Print Control – Completed**, then the processing is complete and the AFS Presentation Designer™ output document has been created.

Step 5: Review the AFS Presentation Designer(™) output document

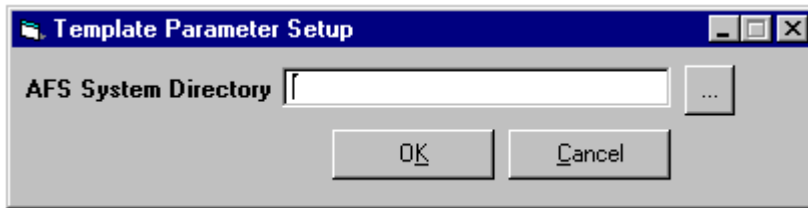
1. Using Microsoft® Word, open the AFS Presentation Designer™ output document. Recall that the path and filename were defined in the AFS Print Utility Configuration under the Output Selection Menu item. The “**Output To**” section of the status bar at the bottom of the main window of the AFS Master

System displays this path and filename. If the information is cut-off, use the fly-over help to display the path and filename in its entirety.

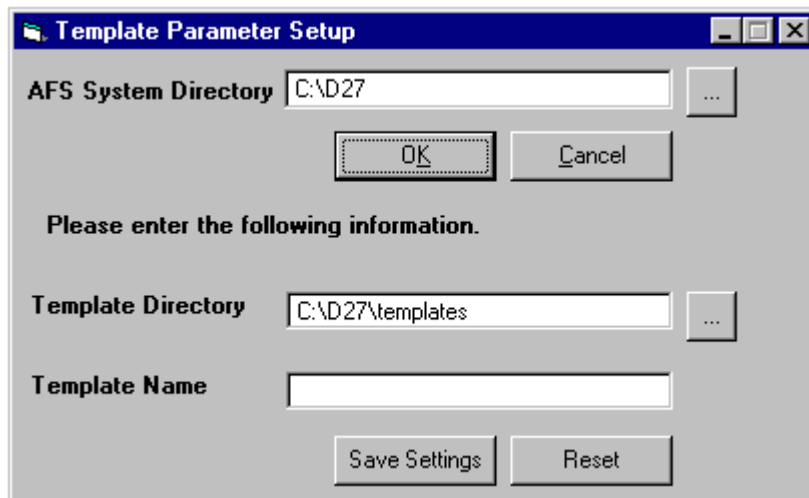
2. Review the resulting output carefully. Pay special attention to error messages that may appear. Carefully check Page Numbering and the Table of Contents.
3. See Troubleshooting for some examples of errors and possible solutions.
4. If the document is error-free and satisfactory, then the process is complete.
5. If there are errors or if other changes are desired, then modify either the Template Document and/or the case in the AFS Master System® and run the case again.

To create a new AFS Presentation Designer template:

1. Click **New** on the Standard Microsoft Word toolbar or click **New** on the **File** menu.
2. Click on the **General** tab
3. Double-click on the **AFS Presentation Designer Template** icon.
4. You will be prompted to enter basic template information in the **Template Parameter Setup** dialog box



5. Enter the **AFS System Directory** to be used by the AFS Presentation Designer™ in building this template document. The system directory determines the location of the system files to be used by the AFS Presentation Designer™. This directory should be the location of the data files of the AFS Master System®. Typically, this is the C:\WXX directory where the system files were installed. Use the browse button to the right of the System Directory box in order to search for the correct directory.
6. Once the system directory has been defined, click **OK** to continue.



7. Enter the location of the template that you are creating in the **Template Directory** box. The system assumes a default location for your templates, but

you may specify any location that you wish. Use the browse button to the right of the Template Directory box in order to search for the correct directory.

8. Enter the filename to be used for your new AFS template in the [Template File Name](#) box.
9. Click [Save Settings](#) to create a file with the Template File Name specified and the file extension 'AFS'. The file will be created in the Template Directory specified.
10. The [AFS Template Designer Toolbar](#) is displayed for all AFS Presentation Designer templates. It provides easy access to the tools offered in creating an AFS template.



The following options are available on the toolbar:



[Set Template Properties](#)



[Variables and Reports](#)



[Column Selection](#)



[Graph Creation](#)



[Help](#)

[Set Template Properties](#)



The first step in creating a template is to Set Template Properties. Once this has been completed, variables, reports, columns, tables, graphs and text may be inserted freely into the template.

1. To set template properties, click on the [Template Properties](#) toolbar button on the AFS Template Designer toolbar.

There are four tabs available:

- [Section Definition](#)

The Section Definition tab is used to insert template sections throughout the template document. As noted above, a section defines how the AFS Presentation Designer™ should interpret the subsequent variables and reports. A section is 'in effect' until another section is declared. A section should always be followed by the insertion of variables, reports and relevant text. Similarly, any insertion of variables or reports must be preceded by a Section Definition.

- [Page Numbering](#)

The Page Numbering tab is used to define the parameters of the page numbering and page number position in the resulting output.

- [Table of Contents](#)

The Table of Contents tab is used to define the entries to be included in the Table of Contents as well as the Table of Contents itself.

- [General](#)

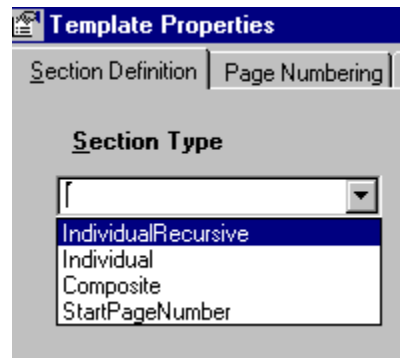
The General tab displays the current working directory for the template document and enables the user to change this definition.

Each of the tabs will be described in further detail.

Section Definition

As noted, the Section Definition tab is used to insert template sections throughout the template document. To insert a section into the template document:

1. Select the appropriate section from the [Section Type](#) box.
2. Click the [Insert](#) button and an AFS Presentation Designer™ template tag will be inserted into the document.



Note:

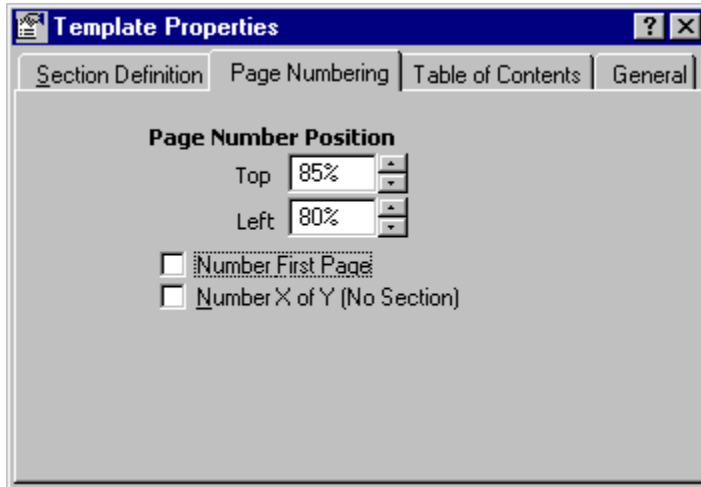
The [Individual Section](#) should precede individual information to be displayed only once. A good example of this would be agent or broker name and address.

The [Individual Recursive Section](#) should precede individual information that is to be displayed for each individual in the case. For example, if the template should show the individual reports for all employees in the census, then the individual recursive section must precede the inserted report.

The [Composite Section](#) should precede composite information.

Page Numbering

The Page Numbering tab is used to define the parameters of the page numbering and page number position in the resulting output.



1. Define the position of the page number in the output document by dialing values for **Top** and **Left**. Use the dialer to define the desired location of the page number as a relative percentage from the top of the page and from the left of the page.
2. Select **Number First Page** to include a page number for the first page of the output document.
2. Select **Number X of Y** to include page numbering in the format 'Page X of Y' in the output document. The default format is 'Page X'.

Table of Contents

The Table of Contents tab is used to define the entries to be included in the Table of Contents as well as the Table of Contents itself.

1. In the template document, in the desired location, click on **Insert Table of Contents**. An AFS Presentation Designer™ template tag will be inserted into the document. In the output document, the **Table of Contents** will be produced in the location of this tag.
2. Throughout the document, determine the location of headings that you want to include in the Table of Contents. For each heading, **highlight the text** as you wish it to appear in the **Table of Contents and click Select Text**.

3. With the heading highlighted, click on [Insert Entry](#).
4. An AFS Presentation Designer™ template tag will be [inserted](#) into the document preceding the highlighted heading.

[General](#)

The General tab displays the current working directory for the template document and enables the user to change this definition.

1. The Working Directory is first defined in the Template Parameter Setup. In order to change the Working Directory to be used by the AFS Presentation Designer™ in building this template document, use the [browse button](#) to the right of the [Working Directory](#) field in order to search for the correct directory. A valid working directory *must* be defined in order to proceed in defining an AFS Presentation Designer™ template document.
2. The [Negative Values Color](#) box defines the font color that will be used for negative values in inserted variables and columns.

Variables and Reports



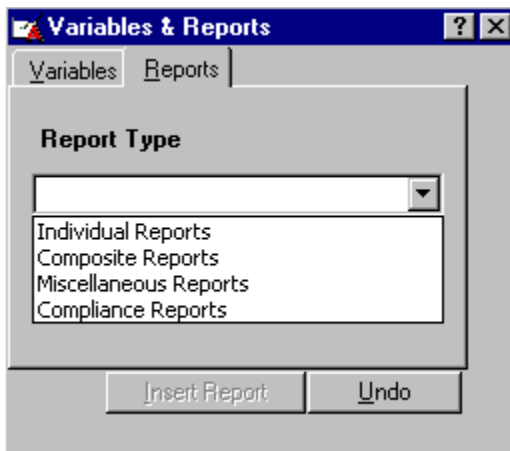
Once a section has been defined, insert variables and reports into the template document as desired. An inserted variable will appear as the value for that case in the output document. An inserted report will appear exactly as it is produced by the AFS Master System®.

To insert a variable:

1. Click on the [Variables](#) tab.
2. [Select](#) the desired variable from the list in the [Variables box](#). The available variables are listed in alphabetical order by name.
3. Click [Insert Variable](#) and an AFS Presentation Designer™ template tag will be inserted into the document.

To insert a report:

1. [Click](#) on the [Reports](#) tab.
2. In the Report Type box, [select](#) the desired [report](#)
3. [Click](#) [Insert Reports](#) and an AFS Presentation Designer™ template tag will be inserted into the document



Note:

The [Individual Reports](#) are those reports defined for the case in the [Selected Reports – Individual](#) box on the Report Manager of the AFS Master System®.

The [Composite Reports](#) are those reports defined for the case in the [Selected Reports – Composite](#) box on the Report Manager of the AFS Master System®.

The [Miscellaneous Reports](#) are those reports defined for the case in the [Selected Reports – Miscellaneous](#) box on the Report Manager of the AFS Master System®.

The [Compliance Reports](#) are those reports defined by the carrier as necessary for NASD / NAIC compliance and produced by the AFS Master System® for the case.

Column Selection



Once a section has been defined, columns may be inserted.

There are two *types* of columns that may be included in the output.

- The first type of available column is simply any AFS Master System® column.
- The second type of available column is a user-defined column that is an arithmetic function of one or more of the AFS Master System® columns.

Column information may be *utilized* in two ways:

- To capture columnar data in order to form a table in the output document. This is useful in creating an ad-hoc 'report' based on columns in the AFS Master System®.
- To capture one year of columnar data in order to use this information as a 'variable' in the output document. This is useful in referring to report data from the body of the output document.

[To insert an AFS Master System® column:](#)

1. In the [Master System Columns](#) box, select the desired column or columns to be inserted. The column list is sorted by column number.
2. Limit the years for which the column values will be displayed by entering a range in the [Year Selection](#) fields [From](#) and [To](#). The default values, from year '1' to year 'n', display column values for all years. If you wish to capture a single year of a column, then limit the “from” and “to” values to the same year. Entries such as 'R' for retirement age and 'M' for mortality age are acceptable.
3. Select the [Automatic Table](#) checkbox in order to convert the inserted column(s) into a table in the output MS-Word document. Clear the checkbox if you wish to capture a single year of the column, and thus no table is desired.
4. If the [Automatic Table](#) checkbox is selected, then select [Include Column Titles](#) checkbox in order to insert the column titles as they appear in the AFS Master System® in the table to be created in the output document. Clear the checkbox if column titles are not desired.

4. If the [Automatic Table](#) checkbox is selected, then choose a style for the table that will be created from the column by clicking on the [MS Word Table Styles](#) box. The styles offered are those available in Microsoft® Word.
5. Click [Insert Column\(s\)](#) and an AFS Presentation Designer™ template tag will be inserted into the document.

To insert a user-defined column:

1. In the Column Selection tab, click on [Define Column](#).
2. The [Column Definition fields](#) will be displayed. The column definition is expressed as a formula using the existing AFS Master System® columns displayed in the Master System Columns box and the arithmetic operators shown.
3. In the New Column Definition field, enter columns by [double-clicking](#) on the desired column in the Master System Columns box. A double-click will bring the expression 'COLXXX' into the New Column Definition field where XXX is the column number.
4. [Click](#) on the appropriate [arithmetic operator](#) to include it in the New Column Definition. The available operations are:



Natural Logarithm



Exponent



Addition



Subtraction



Multiplication

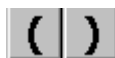


Division


In addition to the arithmetic operations above,



an Accumulation function is offered. This is a simple 'running total' accumulation of the column values year by year. Please note that in order to use the accumulation function, first click on the **accum** button. Click on the left parentheses. Click on the desired column. Click on the right parentheses. The resulting formula will be : DEFn = ACCUM(COLXXX)



Left and right parentheses are available for use in the formula.

5. For example, to create a new column that is the [sum of column 1 and column 2](#):
 - Double-click on Column 1 in the Master System Columns. The expression 'COL1' will appear in the New Column Definition field.
 - Click on the  (Addition) button. The symbol '+' will be added to the New Column Definition field.
 - Double-click on Column 2 in the Master System Columns. The expression 'COL2' will appear in the New Column Definition field.
 - The expression in the New Column Definition field is now 'COL1+COL2'.
6. Click [Done](#) to enter the new column definition to the list of available columns. Click [Cancel](#) to exit Column Definition without creating a new column.
7. User-defined columns appear with the identifier DEF at the end of the columns list. Thus, in our example, the column DEF1=COL1+COL2 will appear at the end of the columns list. From the end of the [Master System Columns listbox](#), select from the user-defined column(s) created and click on [Insert Column\(s\)](#).
8. An AFS Presentation Designer™ [template tag](#) will be inserted into the document.

Graph Creation

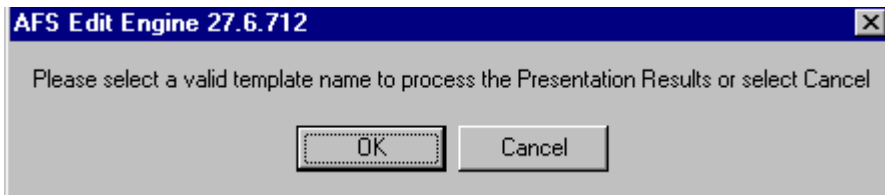


Once a section has been defined, graphs may be inserted based on data in the AFS Master System® columns:

1. In the [Master System Columns](#) box, select the columns desired for the graph to be inserted. Multiple columns may be selected by using the CTL button before selection. The data values in the columns will be displayed as bars, columns, lines etc. in the graph. These data values form a datasheet which is the basis for the graph.
2. In the [Year Selection](#) fields, specify the years of the columns to be included in the graph. The default is from year '1' to 'n' and will include all years in the case.
3. In the [Graph Type](#) box, select the desired type of graph. Among the graph types offered are: Area Chart, Line Chart, 3D Area Chart, 3D Line Column Chart, and Pie Chart. Area and line charts generally display the trend of values over time or categories. A pie chart displays the contribution of each to the total.
4. Select the [Include Data Legends](#) box in order to display the data legend for the inserted graph. A data legend is a box identifying the patterns and/or colors used to represent the data in the graph. The data legend will appear to

the right of the inserted graph. Clear the box if no data legend is to be displayed.

5. Enter a **Graph Title** if desired. The title will be displayed in the upper center of the graph. A title entry is optional.
6. Enter a title for the **X Axis**. The title will be displayed beside the x-axis of the inserted graph. A title entry is optional. Typically, the x-axis is used for time or categories.
7. Enter a title for the **Y Axis**. The title will be displayed beside the y-axis of the inserted graph. A title entry is optional. Typically, the y-axis is used to plot the data values.
8. Click on **Insert Graph**.
9. An AFS Presentation Designer™ **template tag** will be inserted into the document.
10. The template document must be an existing file created using the AFS Presentation Designer™. If no template file name is specified, the following dialog box will appear:



11. Save the case. Note that the status bar at the bottom of the main windows displays the updated Output To information.

Troubleshooting

The following are some possible errors that appear in the AFS Presentation Designer™ document.

I don't see my reports in the output document / I see 'error inserting reports' in my output document.

- Check the Template document and verify that a section was defined prior to the insertion of the reports.
- Check your case in the AFS Master System® to verify that reports of that type (e.g. composite) were defined for this case.

I get a Template Validation error when I run my case with a Presentation Designer™ template. The error says that my document is not a valid template file.

- Open the Template document in MS-Word. In **File / Properties**, click on the **Custom** tab.
- Check that there is a property entitled 'TemplateHeader' and that its value is 'AFS Package Template File'. If not, then manually add this property and contact AFS.

I get an 'Undefined variable name' error when I run my case with a Presentation Designer™ template.

- The variable is not in use for your case. Check your case in the AFS Master System® to verify that the particular variable is not relevant to the case. Modify the case to include the variable or remove the variable from the template.