



## Newsletter

July 1, 2011

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### Contact Information

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### Payment Information

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### AutoPay

Please download sign up  
for and fax back to us  
with a voided check copy.

[Sign Up Form](#)

Fax: 574.287.9958 

### We Need Help!

We want to update your agency information!

Xanatek is in the process of updating all our records.  
We are hoping you will help, by filling out a short web  
form.

Please visit our website and complete the short list  
questions. <http://xanatek.com/agency.php>

By completing the form it will help ensure your agency is  
being sent the newsletter, updates, and more.

Thanks,  
Brent Sheppard

### Tip of the Week!

### Saving Specifications when Exporting to Excel

Exporting data to Excel from an IMS report offers an  
option for you to choose the specifications of what you  
wish to display on your spreadsheet. There are a list  
of check boxes to select from that indicates the fields  
that will return on the spreadsheet. Did you know  
you can save those specifications saving time the next  
time you want to run a report with the same  
information displayed?

### How To:

1. Create IMS Report
2. Click Export
3. Choose Excel
4. Click Next to advance to the next screens  
(Hint: I like to choose "include column titles"  
here)
5. Once you reach the screen with all the  
checkboxes, right click to unselect all

6. Check off the items you wish to show up on your spreadsheet
7. Click the Specifications button (bottom left of the Columns window)
8. Select Save
9. Name Specifications (Hint: Also be sure to change the name in the file extension to match)
10. Click Next until you reach the last window
11. You may choose where to save the file and what you would like to name it by clicking the brown button (It has an ellipsis on it (...))
12. Click Execute

[Basic IMS Reports](#)

[Customizing IMS Reports](#)

[Exporting IMS Reports](#)

[View All Tips](#)

### Knowledge Base

Try out Xanatek's new online help center for help documents and videos. Knowledge Base options can now be found under the Help section of the IMS Menu.

Don't see Knowledge Base options? Contact Xanatek for an Update to our most recent version available, 369.

### Boot Camp Moved to October

Come spend two days learning everything you ever wanted to know about IMS. Whether you just need a refresher course or want to learn how to utilize all the features IMS has to offer to further your business we want to see you here! This is also a great opportunity for your office to learn first hand about all the new features IMS has added.

Our classroom setting provides each recruit with a computer to follow along with instructors as they offer in-depth training on every aspect of IMS. Open discussion is encouraged because we also want you to learn from your peers how they use IMS. Cost includes two full days of training and all of your class materials, not to mention lunch both days, for only \$299 per person.

We hope to see you there!

### October 13 and 14 , 2011

For more information visit [Boot Camp](#) online.

To register [click here](#).

### Xanatek Now LinkedIn



Xanatek has a group on the popular LinkedIn.com. We hope this will help to connect users and facilitate discussion on IMS. Please feel free to join and share the group with everyone you know.

If you have any question or comments please email [Brent@xanatek.com](mailto:Brent@xanatek.com)

Be a Fan of Xanatek



Xanatek has a fan site on the popular Facebook.com. Join us today.



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