Templates: The Keys to Understanding MS Word

What is a Template?

A *template* is a blueprint that is used as the basis for creating other documents, such as

- A fill-in form

- A boilerplate shell for writing a standard operating procedure

- A starting point for setting up technical documents (user guides, installation guides, operations manuals)

Word uses templates as containers for styles, AutoText entries, fields, and macros.

Key Points

- You are *always* using templates—even when you create a blank document.

- A *document template* is a special purpose template such as a memo or letter template.

- A *global template* is a template containing settings that are used in all documents; examples are *Normal.dot* and templates that are known as *add-ins*.

- For best results, install templates in the directory where Word looks for them: *C:\Documents and Settings\<your user name>\Application Data\Microsoft\Templates*

Normal.dot (Main Global Template)

- Normal.dot is Word's base template. Word requires Normal.dot to function. If you delete Normal.dot and then open Word, Word will build a new copy of the template.

- You can safely customize Normal.dot, but keep a backup copy with a different name.

Global Templates as Add-Ins

- Create a *global add-in* to run workgroup macros and provide access to AutoText that your workgroup frequently uses.

- To run global add-ins every time you start Word, copy a global template to the following location:

  C:\Documents and Settings\<user name>\Application Data\Microsoft\Word\STARTUP

  If you store a template in the above location, you can use any custom features available in the template during the current Word session; these features are available as soon as Word opens.

- To run global add-ins *temporarily*, select the **Tools** > **Templates and Add-Ins** menu command, then use the **Add** and **Remove** buttons to run templates in the background.

Document Templates

- These are special purpose templates (for example, a template for creating an instructional module).

- Document templates take precedence over global templates. If both types are currently running, and if both contain a *Body Text* style, Word will use the Body Text style from the document template, rather than the same style contained in the global template.

- Store document templates on your hard drive so that Word will recognize any custom toolbars, menus, and other custom features that you have implemented.

Finding or Changing the Default Directory for Document Templates

The goal of the following procedure is to install your templates in Word's default template directory. This procedure ensures that you can select the **File** > **New** command and see your custom templates in the **New** dialog box.

1. Select the following menu command: **Tools** > **Options**.

2. In the **Options** dialog box, click on the **File Locations** tab.

3. In the **File Types** list, click on **User Templates**.

4. Click the **Modify** button. In the **Modify Location** dialog box, you can either browse to a new path or simply note the path so that you know where to copy templates for future use.

Figure 1. Options Dialog Box
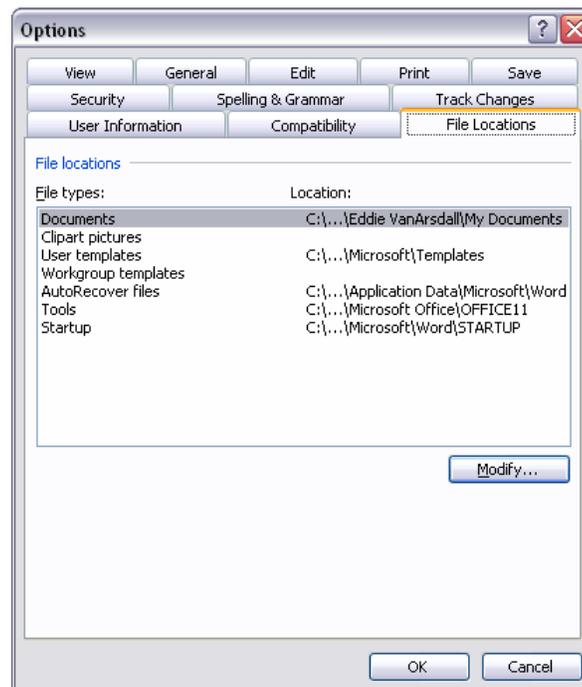
5. When you have finished verifying the path or changing the path, click **OK** to close the dialog box.

6. Using Windows Explorer, copy and paste your template(s) to the specified path.

Testing and Modifying Templates

After you have stored a template in the default **Templates** directory on your hard drive, you can test and modify the template without opening the actual template.

1. Select **File** > **New**.

2. In the **New** template dialog box, double-click on one of the listed templates. A document based on the template (.doc file) opens. The new file is based on the template you selected.

3. You can modify various template features in the following ways:

    ○   If you modify any template styles, click the **Add to Template** option in the **Style** dialog box. When you save or close the active document, Word will ask if you want to save the changes to the underlying template.

    ○   If you add or modify AutoText entries, make sure that the AutoText dialog box (**Insert** > **AutoText**) **Look In** list points to the correct template. The default is **All Active Templates**, which will add the entry to all currently active templates if you do not select another listed template.

    ○   If you use the VBA editor to modify macros, locate your current template in the VBA Project Explorer. Select the template and then click on the **Save** button.

Attaching Templates

Use the **Tools** > **Templates and Add-Ins** dialog box to

*   attach a template to the current document so that the document inherits the styles and formatting used in the underlying template;

*   re-attach a document to its underlying template when the document has lost its connection and you can no longer see custom menus and toolbars stored in the template;

*   run global add-ins that are not stored in Word's Startup directory.

> When attaching a template, you can check the **Automatically update document styles** check box to ensure that formatting in the current document matches the underlying template styles. Remember, however, that this change only works if the styles in the template and the document have the same name.
>
> After checking the **Automatically update...** check box, re-open the Templates and Add-Ins dialog box and uncheck the setting. You may not always want to update document styles, especially if you have modified the styles in the current document.

Styles: The Keys to Best Formatting Practices

What is a Style?

To understand Word styles, you need to understand the difference between *direct* and *styled* formatting:

- **Direct formatting** is an approach to applying character or paragraph attributes using any of the following **Format** menu commands:

  Format > **Font**
  Format > **Paragraph**
  Format > **Bullets and Numbering**
  Format > Borders and Shading

  Casual Word users frequently apply direct formatting to selected text. This approach may be sufficient for short documents such as letters and memos, but it can become labor-intensive and problematic for users who routinely produce long documents.

- **Styled formatting** is an approach to applying character or paragraph attributes using Word *styles*. A *style* is a set of formatting attributes that have been saved with a specific name and can be applied with one mouse click or keystroke. Styles are the best formatting approach to use, because they enable you to change formatting in one place and apply it globally.

Key Points

- You are *always* using styles. The **Normal** style is the default text used in blank documents. Don't confuse the Normal style with the Normal template, *Normal.dot*. The Normal style is inside the Normal template.

- A *character style* is used to format characters only (examples: **Strong** and **Emphasis**).

- A *paragraph style* is used to format entire paragraphs (examples: Normal, Body Text, Headings 1-9).

Methods for Applying Styles

- The **Style List**, located on Word's formatting toolbar (all versions of Word):

Figure 2. Style List

- The **Style** dialog box, available by selecting **Format** > **Style** menu command (Word 97 and 2000)

- The **Styles and Formatting** pane (Word XP and 2003)

Modifying a Style (Word 97 and 2000)

Once you generate a document from a document template, you can modify the styles in the document without affecting the style counterparts in the underlying template (unless you choose to modify the underlying template style by selecting the **Add to Template** option).

1. Place the cursor in a word or paragraph formatted in the style that you want to modify.

2. Select the **Format** > **Style** menu command.

3. In the **Style** dialog box, click **Modify**.

4. Click **Format**.

    The resulting menu shows all of the same format commands available on Word's Format menu. Using the same commands inside the Style dialog box ensures that you are now making global formatting changes, rather than changes to one location in the document.

5. Change formatting as necessary.

6. Click **OK** until you reach the main dialog box.

7. Click **Apply** or **Close**.

## Modifying a Style (Word XP and 2003)

1. Place the cursor in a word or paragraph formatted in the style that you want to modify.

2. Select the **Format** > **Styles and Formatting** menu command. The current style appears at the top of the **Styles and Formatting** pane, labeled **Formatting of selected text**:

Figure 3. Styles and Formatting Pane
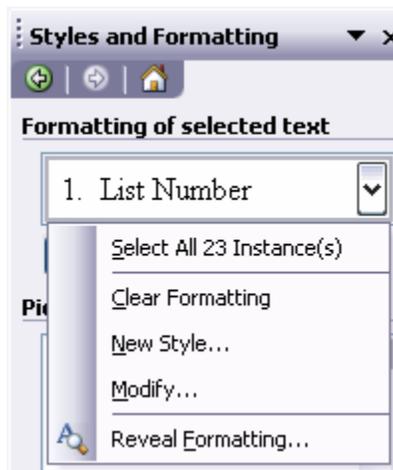
3. In the dropdown list for the current style, click **Modify**.

4. In the **Modify Style** dialog box, change formatting as necessary.

5. Click **OK** until all dialog boxes are closed.

Figure 4. Modify Style Dialog for Word XP and 2003
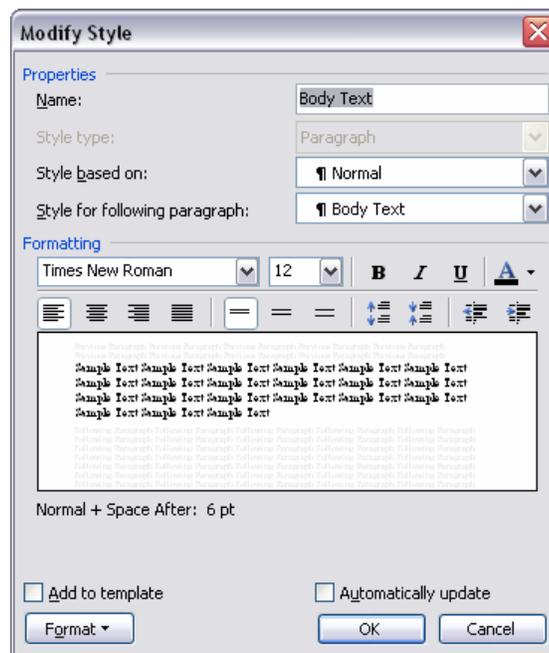
Tips for Using Styles

- When creating custom templates, use Word's built-in styles as much as possible—especially for applying numbering schemes. For example, for numbered steps in procedures, use the **List Number** style. For bulleted lists, use the **List Bullet** style.

- Be aware that many Word styles are based on other styles. For example, a number of styles are based on the **Normal** style. If you change the font of the Normal style, all styles based on Normal will inherit the same font. You can prevent such cascading effects by setting a style's **Based on** property to **(no style)**.

- When using styles, use direct formatting sparingly. If you want to include character formatting (bold or italics), use the Strong and Emphasis styles instead of the Bold and Italics buttons. The main direct attributes I use on top of styles are **Format** > **Paragraph** > (**Keep with Next**, **Keep Lines Together**).

- If you inherit a document in which the author has applied direct formatting on top of styles, you can strip out the direct formatting using the following keystrokes:

  ◦ Press **Ctrl** + **Spacebar** to remove directly applied character formatting.

  ◦ Press **Ctrl** + **Q** to remove directly applied paragraph formatting.

- Style names can contain spaces. Use spaces when naming custom styles, and give the style a name that enables users to understand the style's purpose (for example, *First Page Header*).

- To print a descriptive list of the styles that are stored in a document, select **File** > **Print**. In the **Print** dialog box, select **Print What** and select **Styles** from the dropdown list.

AutoText: The Key to Task Automation

What is an AutoText Entry?

AutoText entries are pre-defined text, graphics, table layouts, and other items that you can store in a template and instantly insert wherever you need them. AutoText reduces the tedium of repeatedly typing the same text. It also enables you to save time by setting up complex table and graphic formats, storing them in a template, and re-using them.

Example: The following note was inserted into this document using an AutoText entry. The note was predefined and stored inside a template.

> <This note lines up with Body Text.>

Key Points

- AutoText entries can be stored only inside a template (.dot file)—not a document (.doc file). You cannot insert an AutoText entry in the current document unless the document is attached to the template in which the AutoText is stored.

- To define AutoText entries, use the **Insert** > **AutoText** menu command.

Defining an AutoText Entry

1. Turn on Word's formatting marks ¶ .

2. Select the item you want to define as an AutoText entry.

   ○ If you want to include the text formatting, include the paragraph mark.

   ○ If you want the text to inherit the formatting of the paragraph in which it is inserted, select only the text and do not select the paragraph mark.

3. Select **Insert** > **AutoText** > **AutoText**.

4. In the **AutoCorrect** dialog box, ensure that the **AutoText** tab is displayed in the front of the tab group.

5. In the **Look in** dropdown list, ensure that the correct template is shown. If not, select the template from the dropdown list.

6. In the text box at the top of the dialog box, type a name for the new entry.

7. Click **Add**. If you have previously added the same entry, Word will display a message asking whether you want to redefine the entry. Click **Yes**.

8. Click **OK**.

> You can insert the new entry in the current document by selecting **Insert** > **AutoText** > **AutoText** and clicking on an entry in the menu list. Entries are organized by the style in which they were formatted.

Tips for Using AutoText Entries

- You can sometimes insert an AutoText entry by typing part or all of its name. If Word recognizes the entry name, it displays pop-up text. When you see the pop-up text, press **Enter** to insert the associated entry. If Word has mistaken the entry for an entry with a similar name, ignore the pop-up and continue typing.

- Word also includes an AutoText toolbar (**View** > **Toolbars** > **AutoText**).

- The AutoText menu and toolbar lists vary according to the current cursor location. For example, if the cursor is in a table, only table-related entries will be visible.

Fields: The Keys to Dynamic Document Information

What is a Field?

A Word *field* is a placeholder for dynamic data. A field links to data that can be changed in one place and updated globally throughout a document.

Key Points

- Page numbers, dates, and cross-references are examples of fields.

- Fields are best viewed with their gray shading turned on (**Tools** > **Options** > **View** > **Show** > **Field Shading Always**).

- Fields can be toggled to show their underlying code or their results (displayed text).

- If you insert a date by selecting **Insert** > **Date and Time** and choosing the **Automatically Update** option, you are inserting a field.

- Fields can be locked and unlocked to manage document revision dates.

- Most of Word's built-in document properties have their own field types (for example, Title, Subject, and Category), which can be inserted into a document to display information.

Inserting a Field (Word XP)

Word's document property fields are probably the best example of field usage. Try the following steps.

1. Select **File** > **Properties**.

2. In the **<document name> Properties** dialog box, select the **Summary** tab.

3. In the **Title** text box, type a document title.

4. Click **OK**.

5. In the document body, place the cursor where you want to insert the document title.

6. Select the **Insert** > **Field** menu command.

7. In the **Categories** list on the left, select **Document Information**.

8. In the **Field names** list, select **DocProperty**.

9. In the **Field properties** list, select the **Title** property.

10. Click **OK**. The document title appears as the field result.

> The **Field** dialog box in Word 2000 is somewhat different from the XP version of this feature. In the Word 2000 version, after selecting a field property you must click the **Add to Field** button to add the property value to the field.

Changing a Property Value and Updating the Corresponding Field

1. Re-enter the **<document name> Properties** dialog box (**File** > **Properties**).

2. Change the document title.

3. Click **OK**.

4. Locate the **Title** field that you inserted during the last procedure.

5. Right-click on the field and select **Update Field**. The new title now shows.

> If you create **Custom** document properties (**File** > **Properties** > **Custom**), those properties will be included in the **Field** dialog box's custom properties list. You can insert and update those property fields using the same technique used for fields related to built-in properties.

Tips for Using Fields

- When you open a document that includes fields, the fields automatically update.

- Word includes a printing option to update fields when a document is printed. If you want to turn off this option, select **File** > **Print** > **Options** > **Printing Options** and uncheck **Field Codes**.

- To update all fields in a document, select all text in the document (**Ctrl** + **A** or **Edit** > **Select All**) and press **F9**. Since this method doesn't update fields stored in document headers and footers, switch the document view from Print Layout to Normal and back to Print Layout. This method usually updates the Header and Footer fields, although I usually write macros to ensure that the fields update.

- To toggle a field and display its codes, right-click on the field and choose **Toggle Field Codes**, or select the field and press **Shift** + **F9**. Perform this step again to show the field results.

- Fields can be locked to prevent updating. For example, you may want to use date fields, but you may not always want them to update. To lock a field, select the field and press **Ctrl** + **F11**. To unlock the field, select it and press **Ctrl** + **Shift** + **F11**. To test a field and determine whether it is locked, right-click on the field. If the field is locked, the shortcut menu's **Update Field** command will be disabled.

- Word includes **Sequence** fields, which are great for list numbering that is independent of Word's internal list templates. Sequence fields are similar to FrameMaker's building blocks for numbering.

Customization:
The Key to Making Word Work the Way You Do

In addition to using the features described in the previous sections, you can add macros, custom menus, and custom toolbars to Word templates.

Macros

Macros are scripts created in the Visual Basic for Applications (VBA) programming language. You can use Word's macro recorder (**Tools** > **Macro** > **Record New Macro**) to record simple macros, or you can use the VBA editor (**Tools** > **Macro** > **Visual Basic Editor**) to write more extensive macros.

An effective way to learn VBA is to record macros, switch to the VBA editor, and examine the resulting code. If you know Word's advanced features, the code will be easier to read.

> Macros are beyond the scope of today's discussion, but I can recommend resource books.

Custom Menus

Adding a Custom Menu

1. Select **View** > **Toolbars** > **Customize**.

2. In the **Customize** dialog box, select the **Commands** tab.

3. At the bottom of the dialog box, ensure that the correct template shows in the **Save in** field. If not, click the dropdown list and choose the correct template.

> Always verify that you are about to customize the correct template. Word often displays the Normal.dot template as the default in many lists, so you could easily customize Normal without intending to. You should only add customized features to the Normal template if you want those features to be available in all of your documents.

4. Scroll to the bottom of the **Categories** list and select **New Menu**. **New Menu** now appears in the **Commands** list on the right.

5. Click and drag the new menu command on the **right** to Word's Menu Bar.

6. Drop the menu wherever you want to position it.

7. Click on various categories on the left and examine the **Commands** list for each category.

8. Drag your preferred commands and drop them on the new menu.

9. Click **Close**.

Custom Toolbars

Adding a Custom Toolbar

1. Select **View** > **Toolbars** > **Customize**.

2. In the **Customize** dialog box, select the **Toolbars** tab.

3. Click **New**.

4. In the **New Toolbar** dialog box, name the toolbar and ensure that the correct template shows in the **Make toolbar available to** field. If not, click the dropdown list and choose the correct template.

5. Click **OK**. A small floating toolbar appears. The toolbar will become larger as you add buttons.

6. Click on various categories on the left and examine the **Commands** list for each category.

7. Drag your preferred commands and drop them on the new toolbar.

8. Right-click on one of the new toolbar buttons and experiment with the shortcut menu commands.

9. When you have finished, click **Close**.

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