CHAPTER 11 TEMPLATES

INFOCUS

A *template* is a preformatted document that you can use to create new documents. Templates are commonly used in organisations as a basis for creating standard business documents, such as letters, memos and faxes. A template will contain all of the required formatting, page layout, headers and footers, styles and so on, needed to create the new document, so all you need to do is type!

In Microsoft Word all documents are based on a template, even if it is the blank *Normal* template. You can use one of the many templates provided by Word to create new documents, or you can create your own templates.

In this session you will:

- ✓ gain an understanding of templates
- ✓ learn how to use a sample template
- ✓ learn how to download an online template
- ✓ learn how to create a template
- ✓ learn how to modify a template
- ✓ learn how to use a custom template
- ✓ learn how to attach a template to a document
- ✓ learn how to copy styles between templates
- ✓ learn how to create a template from an existing template
- ✓ gain an understanding of how to develop effective templates.

UNDERSTANDING TEMPLATES

A *template* is a preformatted document that is used to create other documents. Templates can automate the process of sending out routine correspondence, such as letters, memos and faxes. A well-designed template will contain all of the required page layout and formatting, so all you need to do is create a document based on that template, then click and type the required text.

Elements Of A Template

A document template might contain the following elements that help to automate and speed up document production, especially for common business documents:

- *Styles* to format headings, text and paragraphs
- *Page Layout*: such as page size and orientation, margins, headers and footers (for letterhead and logos, for example), cover pages and so on
- *Page Formatting*: such as borders, lines and other visual elements
- *Boilerplate* text to be used, such as greetings, salutations, standard content and so on. This text may also be held in *placeholders*, which control the position and format of text
- *Macros* to automate routine tasks, such as shortcuts for inserting the date, updating the file location or inserting a particular block of text
- *Building blocks* that can be used to insert blocks of standard text, closing signatures, phrases or images into a document
- *Themes* that comprise coordinated colours, fonts (such as heading and body styles) and effects.

Using Available Templates

By default, all new documents in Word are based on the *Normal.dotx* template, which can be modified to suit your needs. You can create your own templates, or Word includes many installed *sample templates* that you can use to create new documents. To view the full range of installed templates, click on the *File* tab, click on *New*, then click on *Sample Templates*.You can also modify sample templates to suit your needs.

If this range is still not enough to satisfy you, *Microsoft Office Online* contains an extensive library of templates that you can download and use freely. These are available at *www.office.com*.

Differences Between Templates And Documents

A Word template is similar to a Word document except that it can contain *building blocks*. You can also tell the difference between a template and a document by their file extensions. Word documents use the file extension *.docx* while templates, by default, include the file extension *.dotx*. Templates can also include the file extension *.dotm*. Templates with the file extension *.dotm* support VBA macro code while templates with the file extension *.dotx* cannot store VBA macro code.

Locating Templates

Unless you specify the save location, templates are stored in the default *Templates* folder. It is recommended that you store all of your templates in this folder so that they will appear in the list of available templates in the *New* dialog box (via the *File* tab, *New*, *My Templates*).

To find out where your templates are stored, click on the *File* tab and then click on **Options**. Click on *Advanced*, scroll down and click on **[File Location]**. Your templates reside in the folder specified in *User templates*. To view the full address path or to modify the template's location, click on **Modify**.
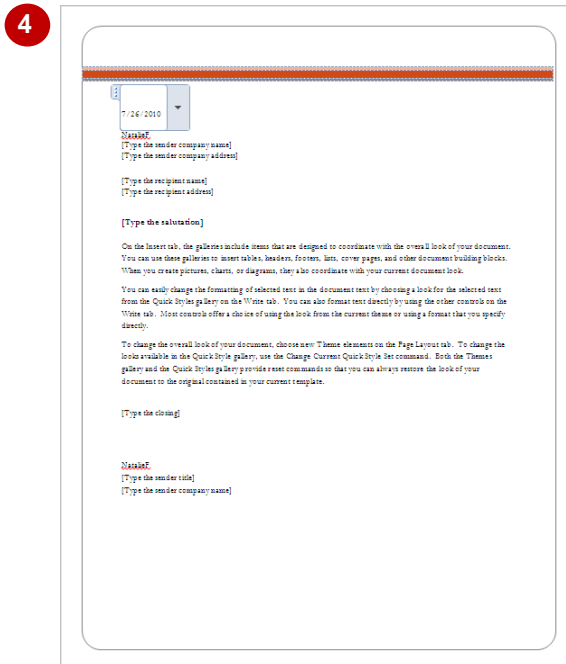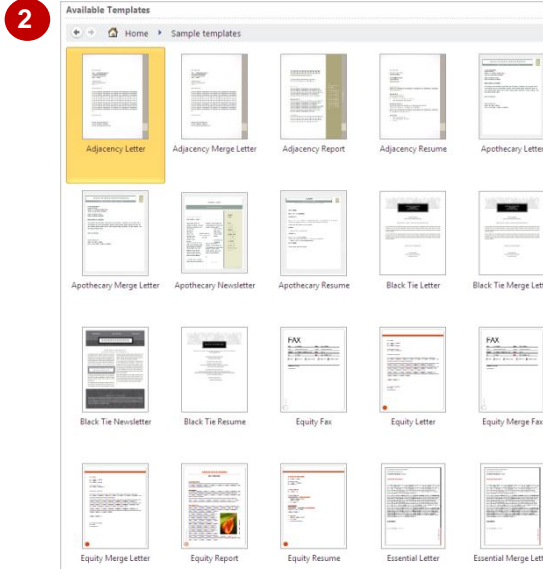
USING A SAMPLE TEMPLATE

Word includes many sample templates available for you to use, such as letters, resumes, faxes and report templates. You can create a document based on one of these templates, or you can

modify a sample template to suit your needs. You can view the full range of sample templates via the *File* tab, then by clicking on *Sample Templates*.

Try This Yourself:

Before starting this exercise ensure that Word is open...

1. Click on the *File* tab, then click on *New* to display *Available Templates*

2. Click on *Sample Templates* to view thumbnails of the available templates

3. Click on *Equity Letter*, then click on **[Create]** to open the template as a new document

4. Click on *[Pick the date]*, then click on the drop arrow and click on **[Today]** to insert today's date

   These text placeholders, or fields, help to control the format and position of text…

5. Click on *[Type the sender company name]*, then click on the handle of the placeholder to select the placeholder, and then press [Del]

6. Repeat step *5* to delete the *[Type the sender company address]* placeholder

7. Click in the remaining placeholders, such as *Type the salutation*, and type details appropriate for a letter – just make up the information as you go along

8. Save the document as *My Letter* in the course files folder, then close the document

For Your Reference…

To *use* a *sample template*:

1. Click on the *File* tab, click on *New*, then click on *Sample Templates*
2. Click on a template, then click on **[Create]**
3. Click in the placeholders and type, or press [Del] to delete the placeholders

Handy to Know…

- To make changes to a template, navigate to the *Templates* folder in *Windows Explorer*, right-click on the template and select **Open**. This will open the template in Word *as a template*. You can then modify, save and close the template.

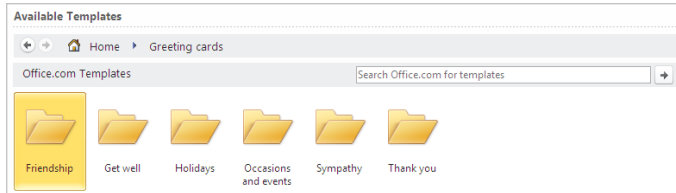# DOWNLOADING AN ONLINE TEMPLATE

As well as the many sample templates available, **Microsoft** has many more templates available online. You can browse for the desired template via the **File** tab, and here you will find many template designs for a whole range of document types, such as calendars, brochures, business cards, newsletters, invoices, the list goes on!

Try This Yourself:

Before starting this exercise ensure you are connected to the internet...

1 Click on the **File** tab and click on **New**

   All categories of online templates are displayed under Office.com Templates…

2 Click on **Greeting Cards** under **Office.com Templates**

   A series of folders will appear. Here you can select the holiday type…

3 Click on **Holidays** to preview the range of greeting card templates

4 Scroll down to and click on **Father's Day card** to select it

5 Click on **[Download]**

   The template will download and open in Word as a new document. You can now modify and save the document as required…
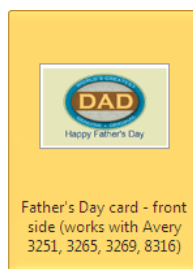
6 Close the document without saving
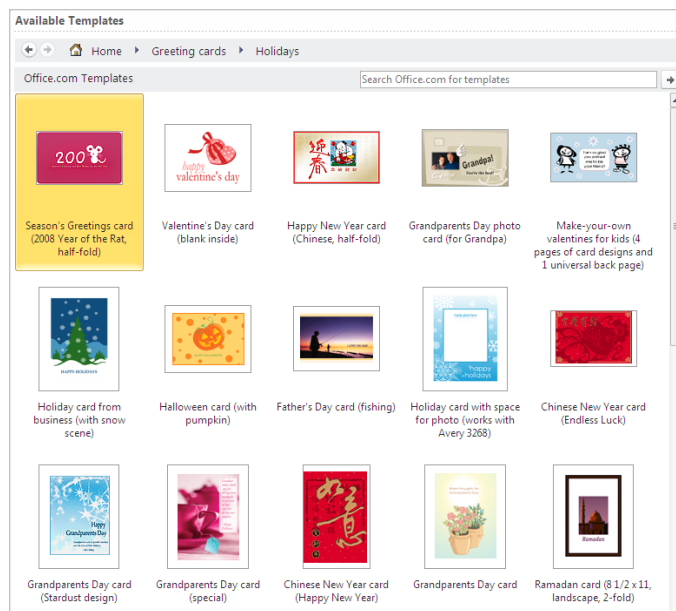
For Your Reference…

To **download** an **online template**:

1. Click on the **File** tab and then click on **New**
2. Click on a category under **Office.com Templates** and then click on the template
3. Click on **[Download]**
4. Modify and save the document as required

Handy to Know…

- Many of the online templates have been created with earlier versions of Word. When you save the document, a message may appear informing you that you are saving the document to a newer version. In most cases you can simply click on **[OK]** to save the document without any problems.

CREATING A TEMPLATE

To create your own template, simply open a new document, apply the required formatting and page layout, create styles and so on, and then save the document as a template. Templates contain the file name extension **.dotx**, and when you save a template it will by default save it in the **My Templates** folder, which makes it easy to access your templates.

Try This Yourself:

Before starting this exercise ensure that Word is open...

1 Click on the **File** tab, click on **New**, ensure **Blank document** is selected and click on **[Create]**

2 Type **Monthly Sales Report**, press Enter and type **The Sales department has achieved the following figures for the month of <month>:**

3 Click in the heading, click on the dialog box launcher for **Styles** on the **Home** tab to display the **Styles** dialog box

4 Click on **Heading 1** to apply this style to the heading text

5 Click on the **File** tab, then click on **Save As** to display the **Save As** dialog box
You will leave the filename as it is…

6 Click on the drop arrow for **Save as type** and select **Word Template (*.dotx)**
As you have selected to save as a template the default save location changes…

7 Click on **[Save]** to save the template, and then close the template

8 Click on the **File** tab, click on **New** and then click on **My Templates** to display the **My Templates** dialog box
You will notice that your new template appears in this list ready for you to use…
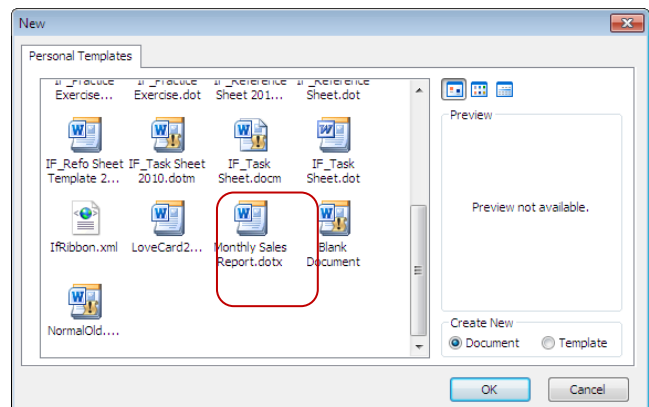
9 Click on **[Cancel]**

Monthly Sales Report
The Sales department has achieved the following figures for the month of <month>:

4
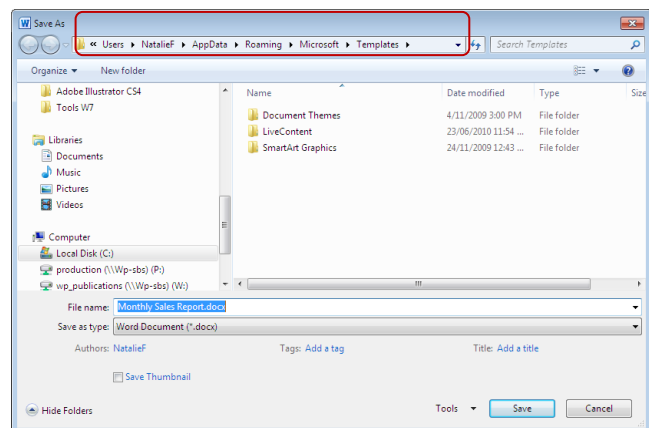
6

8

For Your Reference…

To **create** a **template**:
1. Press Ctrl + N to create a new blank document and format as required
2. Press Ctrl + S to display the **Save As** dialog box, type a filename, then click on the drop arrow for **Save as type**, select **Word Template (*.dotx)** and click on **[Save]**

Handy to Know…

- To make it easy to create documents based on templates that you've created, you must save the template in the default **Templates** folder. This ensures that your custom template will appear in the **My Templates** dialog box.

MODIFYING A TEMPLATE

You can modify existing templates as required, including the ***Normal.dotx*** template. For example, you might need to change the font type to ensure consistency with corporate fonts. To modify a template, you must open the template *as a template*, make the required changes and then save.
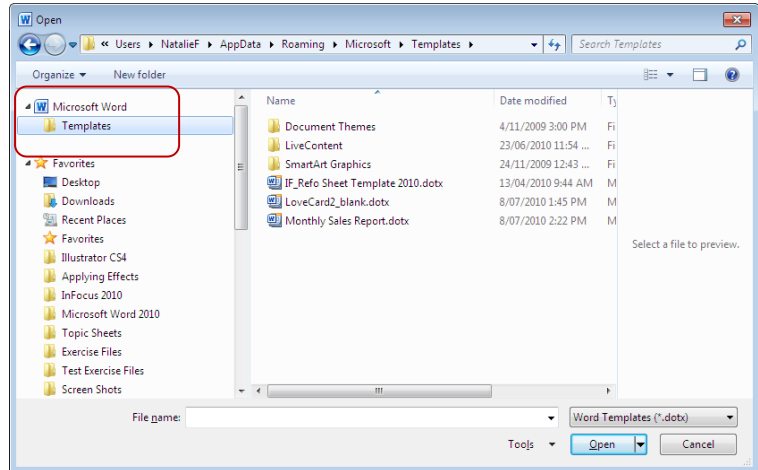

Try This Yourself:

Before starting this exercise ensure Word is open...

1. Click on the ***File*** tab, then click on ***Open*** to display the ***Open*** dialog box, or press `Ctrl` + `O`

2. Click on the button to the right of ***File name*** and select ***Word Templates (*.dotx)***

3. Scroll to the top of the left pane and click on the ***Templates*** folder
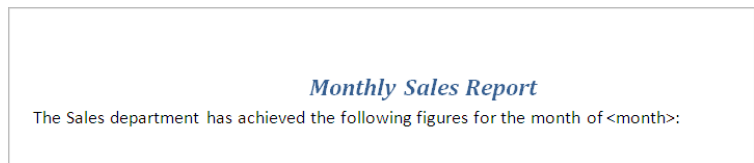
    All templates will be displayed in the right pane…

4. Click on ***Monthly Sales Report.dotx***, then click on **[Open]**

    You will now make changes to the template…

5. Ensure that the insertion point is in the heading, then click on ***Centre*** 🖳 in the ***Paragraph*** group

6. Select the heading, then click on ***Italics*** 〔*I*〕 in the ***Font*** group

7. Save and close the template

3

6

Monthly Sales Report
The Sales department has achieved the following figures for the month of <month>:

For Your Reference…

To ***modify*** an ***existing template***:

1. Click on the ***File*** tab and then click on ***Open***
2. Select **Word Templates** or **All Word Templates** and navigate to the correct folder
3. Double-click on the template, make the changes and save the template

Handy to Know…

*   If you want to open a template that contains macros or was created with an earlier version of Word, make sure you select ***All Word Templates (*.dotx, *.dotm, *.dot)*** for ***File of Type*** (next to ***File name***) in the ***Open*** dialog box.
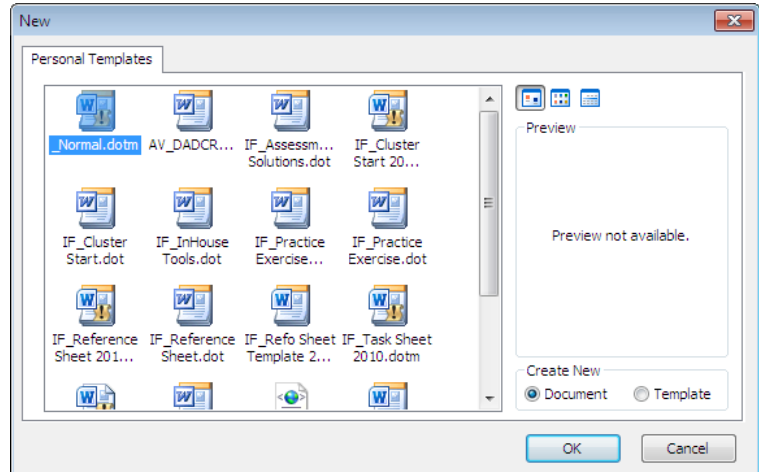

USING A CUSTOM TEMPLATE

Once you have created your template, you can then use it to create new documents. By using custom templates, you can produce documents with a consistent look and feel. It is common for organisations to create a range of custom templates for their standard business documents that include the same or similar page layout, formatting and the like.

Try This Yourself:

Before starting this exercise ensure Word is open...

1 Click on the *File* tab, then click on *New*

2 Click on *My Templates* under *Templates* to open the *New* dialog box

3 Locate and click on *Monthly Sales Report.dotx*, then click on **[OK]**

The template will open as a new, blank document…

4 Create a fictional report by typing a month and adding some figures below

5 Click on the *File* tab, then click on *Save* to open the *Save* dialog box

6 Ensure that *Monthly Sales Report.docx* appears in *File name*, then navigate to the course files folder

7 Click on **[Save]** to save the document, and then close the document

2
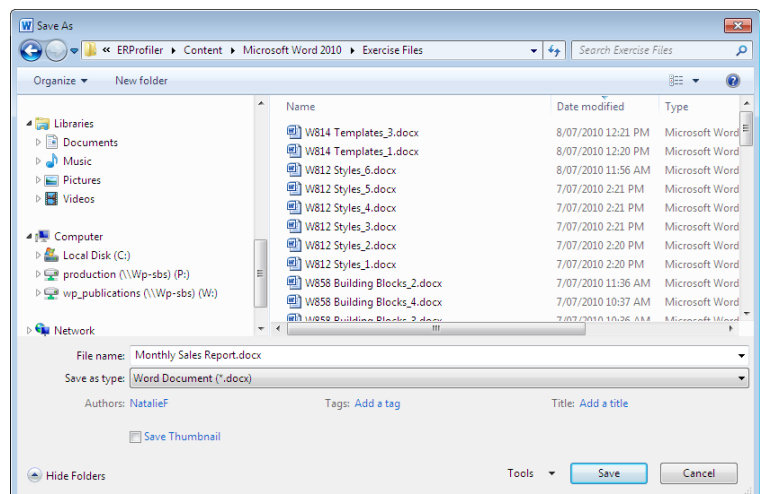
6

For Your Reference…

To *use* a *custom template*:

1. Click on the *File* tab, then click on *New*
2. Click on *My Templates*
3. Double-click on the desired template
4. Make the required changes, and then save the document

Handy to Know…

- As well as creating a document based on a template, you can also create a template based on a template! To do this, click on *Template* under *Create New* in the *New* dialog box and then click on **[OK]**.

ATTACHING A TEMPLATE TO A DOCUMENT

It may be necessary to apply a different template to an existing document. In Word this is known as *attaching* a template. When you attach a template, Word will override the current template with the attached template. When you attach a template to an existing document, all styles and formatting within the document will be updated to reflect those in the template.


Try This Yourself:

Open File
Before starting this exercise you MUST open the file W814 Templates_1.docx...

1 Click on the *File* tab, click on *Options* to display the *Options* dialog box, and then click on *Customise Ribbon*

You will first ensure that the Developer ribbon is displayed, as this ribbon contains the commands we want to work with…

2 Click on *Developer* under *Main Tabs* so that it appears with a tick and then click on [OK]

The Developer tab will now appear…

3 Click on the *Developer* tab, then click on *Document Template* in the *Templates* group to open the *Templates and Add-ins* dialog box

You will now attach a template...

4 Click on [Attach] to open the *Attach Template* dialog box

5 Navigate to the course files folder, click on *W714 Templates_2.dotx* and click on [Open]

6 Click on *Automatically update document styles* until it appears ticked

This will ensure that all styles in the document with the same name will be updated by the new template…

7 Click on [OK] to apply the template to the document, and then save and close the document
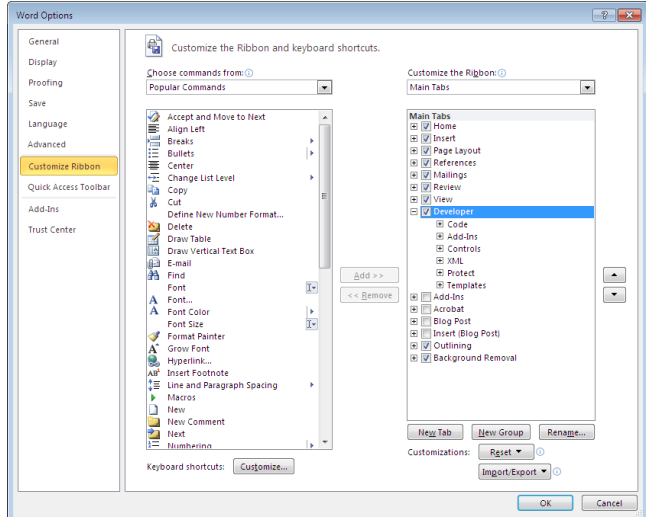
1

3
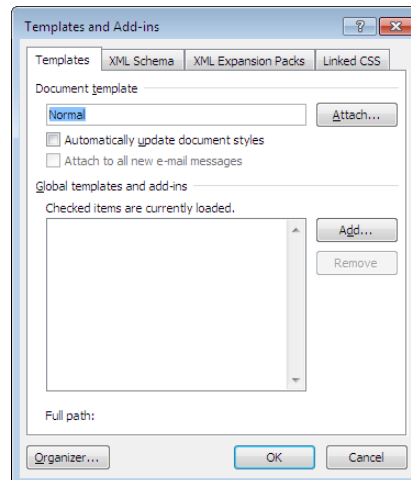
For Your Reference…

To *attach* a *template* to a document:
1. From the *Developer* tab, click on *Document Template* in the *Templates* group
2. Click on [Attach] and then double-click on the template
3. Tick *Automatically update document styles*, then click on [OK]

Handy to Know…

- When you click on **Attach Template**, the **Open** dialog box will navigate to the **Templates** folder by default.

COPYING STYLES BETWEEN TEMPLATES

Word provides a feature called the *Organiser* which lets you copy styles between documents and templates. This nifty feature can save you quite a bit of time because it is based on the premise that if you have a set of styles that you have already created, why create them again?

## Try This Yourself:

Open File

Before starting this exercise you MUST open the file W814 Templates_2.dotx...

1   Click on the *Developer* tab, then click on *Document Template* 📄 in the *Templates* group to open the *Templates and Add-ins* dialog box

2   Click on **[Organiser]** to open the *Organiser* dialog box

3   Click on **[Close File]** under *Normal.dotm*, then click on **[Open File]** to open the *Open* dialog box

   You will copy a style from the current, open template to another template…

4   Navigate to the course files folder, then double-click on *W714 Templates_4.dotx*

5   Click on *Highlighted Text* in the box on the left, then click on **[Copy]** to copy the style to *W714 Templates_4.dotx*

6   Click on **[Close]**, then click on **[Yes]** to save the template

7   Click on the *Home* tab, then click on the dialog box launcher for *Styles* to display the *Styles* dialog box

   You will notice that the copied style is now listed…

8   Save and close the document
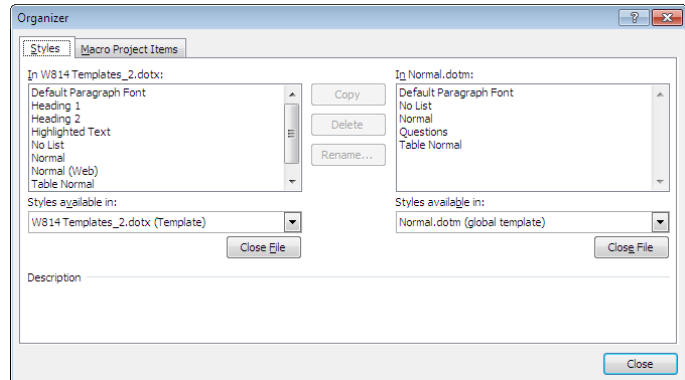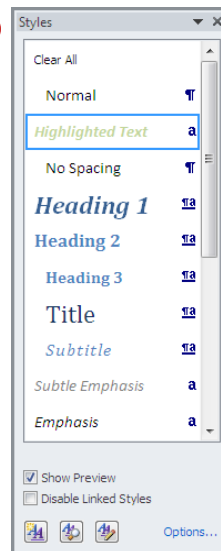
For Your Reference…

To *copy styles* between *templates*:

1. From the *Developer* tab, click on *Document Template* 📄 in the *Templates* group, then click on **[Organiser]**
2. Ensure that the two files are open
3. Click on the style to be copied, then click on **[Copy]**

Handy to Know…

- You can use `Ctrl` and `Shift` to select multiple styles to copy.

- To hide the *Developer* tab (or any tab), click on the *File* tab and then click on *Options*. Click on *Customise Ribbon* and then click on *Developer* under *Main Tabs* so that it appears without a tick. Click on **[OK]**.

CREATING A TEMPLATE FROM A TEMPLATE

These days there's hardly a need to create templates from scratch. With the seemingly endless range of sample templates you're sure to find a particular design and layout that suits your needs. But even if you can't find exactly what you're looking for, save time by modifying an existing template design—you'll have a new template in no time at all!

Try This Yourself:

Open File

Before starting this exercise you must open the file W814 Templates_5.dotx...

1 Click on the **File** tab, then click on **Save A**s to display the **Save As** dialog box

2 Type **My Template** in **File name**, ensure that the course files folder is open, then click on **[Save]**

Now let's modify the template so that the sender's company details will be included in the template...

3 Click on **[TYPE THE SENDER COMPANY NAME]** in the orange bar and type **Alpheius Global Enterprises**

4 Click on **[Type the sender company address]** in the orange bar and type **414 St Edmonds Road Melbourne VIC 3304**

5 Click on **[Type the sender phone number]** and type **61 3 9844 0000**

6 Click on **[Type the sender email address]** and type **alpheius@alpheiusge.com.au**

7 Save and close the template

6

[Pick the date]

[Type the recipient name]
[TYPE THE RECIPIENT COMPANY NAME]
[Type the recipient address]

[Type the salutation]

On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document. You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, or diagrams, they also coordinate with your current document look.

You can easily change the formatting of selected text in the document text by choosing a look for the selected text from the Quick Styles gallery on the Write tab. You can also format text directly by using the other controls on the Write tab. Most controls offer a choice of using the look from the current theme or using a format that you specify directly.

To change the overall look of your document, choose new Theme elements on the Page Layout tab. To change the looks available in the Quick Style gallery, use the Change Current Quick Style Set command. Both the Themes gallery and the Quick Styles gallery provide reset commands so that you can always restore the look of your document to the original contained in your current template.

[Type the closing]

LisaC
alpheius global enterprises

ALPHEIUS GLOBAL ENTERPRISES
414 St Edmonds Road Melbourne VIC 3304 • 61 3 9844 0000 • alpheius@alpheiusge.com.au

For Your Reference…

To **create** a **template** from an **existing template**:

1. Open the template
2. Make the required changes
3. Click on the **File** tab, then click on **Save As**
4. Select **Word Template**
5. Type the **File name**, then click on **[Save]**

Handy to Know…

- You can create a template from a **sample template** or from any of the templates stored in the **My Templates** folder. Click on the **File** tab, click on **New**, click on the template, click on **Template** in **Create New**, then click on **[Save]**.

TIPS FOR DEVELOPING TEMPLATES

Templates will certainly save you time when creating business documents. Templates also ensure consistency across organisational documents. However, it is important to ensure that users know how to use templates, as well as ensuring that your templates are accurate. Below we have included some tips and hints to consider when developing templates for business use.

Consider Your Target Audience

Your templates must be designed to suit the purpose of the communication. This purpose is closely aligned with what the audience feels they need. For example, if you have to develop a template that will be used to create product specification sheets or bulletins, it is important to ensure that the features included in the bulletin template are precisely what the audience will expect to find.

Templates used in this way can serve as a good tool for ensuring that the author presents information that is relevant to the reader.

Conform To Company Guidelines and Standards

Templates that don't adhere to or even deliberately flaunt company standards and guidelines are doomed to fail. Before embarking on a new template, ensure that you are familiar with the company's standards for fonts, paragraphs, margins, colours, use of logos, and the like.

Proof The Template Thoroughly

One of the primary benefits in using templates is accuracy. If your template contains errors then those errors will appear in every document generated from the template! Use on-screen print preview to refine the appearance of the text and the overall layout. Zoom in on critical areas to obtain a better look. Print a copy on a laser printer and check the spelling and grammar thoroughly. Also, read the document several times to ensure that it is readable and that the information flows as it should. If it is a colour document, print the document on a colour printer as screen colours do not always reproduce as expected in printed format.

Test A Sample Document

If possible, produce a sample document from the template and give it to a potential user to see whether or not any further changes are required.

Train Other Users

Train other users to use the template correctly. If training is not possible produce a set of instructions or explanatory notes on the correct use of the template.

NOTES: