

Microsoft Word 2007/2010: Working with Templates

Templates are documents with a preset format which can be used to begin other documents. Using templates eliminates having to recreate the same format each time it is needed. You can save time and effort when creating new documents. Word features a variety of built-in preset templates that can be used immediately or altered to meet your needs. You can also create new templates with a custom design for frequently used documents. This document provides instruction on using and customizing built-in templates and creating new templates.

- What Is a Template?
- Types of Templates
- Choosing a Word Template
- Customizing an Existing Template
- Creating & Sharing a Template
- Templates Location for User Templates or Workgroup Templates

What Is a Template?

A template is a document with preset layout, formatting, and settings that acts as a basic structure for a document. Word offers templates as a guide for creating readable, uniform documents. Unless you specify a template when beginning a new document, Word automatically bases documents on the *Normal* template. The following list is an example of the prearranged formatting options in Word's *Normal* template:

- Font face and size
EXAMPLE: *Calibri at 11 points*
- Language
EXAMPLE: *US English*
- Alignment
EXAMPLE: *flush left*
- Line spacing
EXAMPLE: *1.15*
- Widow/orphan control
EXAMPLE: *set to on*

Other templates use modifications of the above features and may include different page layouts, text, graphics, macros, or styles.

Types of Templates

There are two basic types of templates: built-in templates and custom templates.

Built-in Templates

Built-in templates provide a preset structure for several common types of documents, including:

- Faxes
- Letters
- Memos
- Reports
- Resumes
- Web pages
- Documents without custom formatting

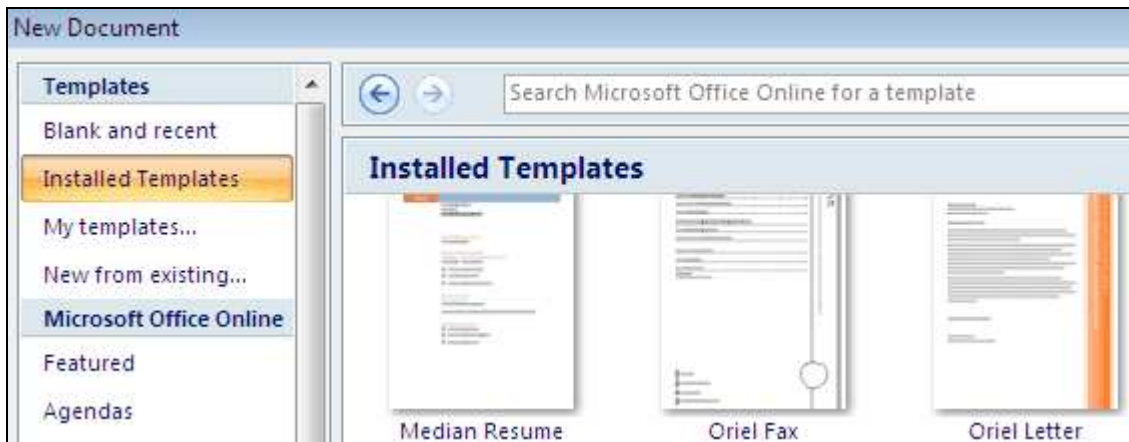
You can create documents using these basic templates as they are, or you can modify them to better suit your needs.

Custom Templates

If you have formatting or a layout that you use frequently in your work but that is not offered in Word's collection of preset templates, you can easily create a new template using your own formatting and settings. The new template can then be saved with Word's other templates and accessed each time you want to use the custom format..

Choosing a Word Template

1. From the OFFICE BUTTON/FILE, select *New...*
The *New Document* dialog box appears.



2. Under *Templates*, click **INSTALLED TEMPLATES**
3. From the *Installed Templates* section, select the desired template
4. Click **CREATE**. The template is applied to your new document.

Customizing an Existing Template

If you like the overall style of an existing template but would like to make a few changes, you can customize the template to meet your needs. To do this, you can either modify the original template file or create a new file closely based on the old template.

WARNING: If you modify the template file, the original template will be permanently changed.

Modifying the Original Template File

1. From the OFFICE BUTTON/FILE, select **Open**. The *Open* dialog box appears.
2. From the *Files of type* pull-down list, select **All Word Templates (*.dotx; *.dotm; *.dot)**
3. Using the *Look in* pull-down list, locate and select the template file you want to modify
NOTE: The location will vary depending on your computer setup. Generally, templates are located in C:\Program Files\Microsoft Office\Templates\1033.
4. Click **OPEN**
5. Modify the template by adding the desired text, graphics, and formatting to be included in the modified template
6. From the OFFICE BUTTON/FILE, select **Save**

Creating a New Template File Based on an Existing Template

1. Open a Word template
2. Modify the template by adding the desired text, graphics, and formatting to be included in the new template
3. From the OFFICE BUTTON/FILE, select **Save As...** The *Save As* dialog box appears.
4. From the *Save a copy of the document* pull-down list, select **Word Template**
5. In the *File name* text box, type the desired filename
WARNING: Do not save the converted template file as the name of the original template file.
6. Using the *Save in* pull-down list, select the desired save location
WARNING: Do not save an original template in the same location that you save documents created from the template.
7. Click **SAVE**

Creating a Template

If you have formatting that you use frequently in your work but is not offered in Word's collection of preset templates, you can easily create a new template using your own formatting and settings.

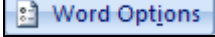
1. Create or open the file containing the formatting and settings to be included in the custom template
2. From the OFFICE BUTTON/FILE, select **Save As...** The *Save As* dialog box appears.
3. From the *Save a copy of the document* pull-down list, select **Word Template**
4. In the *File name* text box, type the desired filename
5. Using the *Save in* pull-down list, select the desired save location
WARNING: Do not save an original template in the same location that you save documents created from the template
For more information, refer to Template Locations below.
6. Click **SAVE**

Template Locations

You can save time and effort by creating new documents using templates designed to format a specific type of document. If you create many similar documents, templates save time by formatting the page to pre-defined settings, allowing you to start writing immediately. As you create and customize templates, it is important to consider the location you will use to save those templates. To prevent accidental changes, do not save templates in the same location you save your document files. Save templates in either the Word templates folder or in a folder you designate specifically for templates. Be sure to give the folder an easily identifiable name like *Working Templates*.

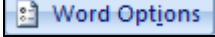
Defining a User Templates Location

User templates are your personal collection of templates.

1. From the OFFICE BUTTON/FILE, click **WORD OPTIONS**  The *Word Options* dialog box appears.
2. In the *Categories* pane, select **Advanced**
3. In the *General* section, click **FILE LOCATIONS...** The *File Locations* dialog box opens.
4. In the *File Locations* dialog box, select **User templates**
5. Click **MODIFY**. The *Modify Location* dialog box appears.
6. From the *Look in* pull-down list, locate and select the appropriate location
7. To confirm the drive and directory location, Click **OK** twice.

Defining a Workgroup Templates Location

Workgroup templates are available to a group of people (e.g., members of a department). They should be saved to the *Workgroup templates* area on a shared network drive. You can use Word to set the location of *Workgroup templates* (e.g., on a network drive). These templates will then be available via the OFFICE BUTTON/FILE » NEW.

1. From the OFFICE BUTTON/FILE, click **WORD OPTIONS**  The *Word Options* dialog box appears.
2. In the *Categories* pane, select **Advanced**
3. In the *General* section, click **FILE LOCATIONS...** The *File Locations* dialog box opens.
4. In the *File Locations* dialog box, select **Workgroup templates**
5. Click **MODIFY**. The *Modify Location* dialog box appears.
6. From the *Look in* pull-down list, locate and select the appropriate location
7. To confirm the drive and directory location, click **OK** twice.