

Creating Templates – For Letterheads, Fax Cover Sheets, and More

This document provides instructions for creating and using templates in Microsoft Word.

Opening Comments

A template is a type of document that already contains content (such as text, styles, and formatting); page layout settings (such as margins and line spacing); and design elements (such as special colors, borders, and logos).

Think of a template as a very helpful starting point. If, for example, you have weekly team meetings and have to create the same meeting agenda over and over but with slightly different details every time, starting out with a lot of information already in place will vastly speed up your work.

Even if you have to add something to the sheet, or delete another part, the essential content is there already; there is no need to build it from the ground up.

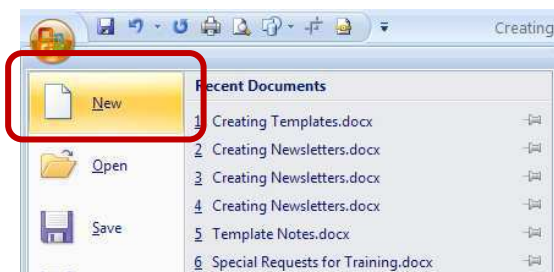
Benefits of Using Templates

- There is no need to search through various document versions, looking for the most recent changes. They would all be stored in the template.
- Since a template opens up a copy of itself as a fresh, new document, there is no worry about accidentally saving over one of your previous documents.
- The template's content can be altered so that it contains only the information you want.
- The template would always be in the same location in Word, with all your other templates.

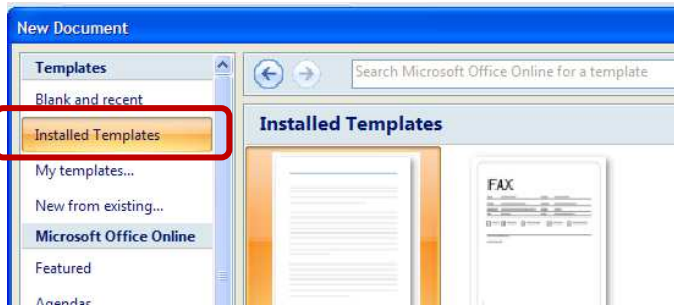
Using Installed Templates

Microsoft Word includes over 30 pre-installed templates for document types such as letters, faxes, reports, résumés, and blog posts.

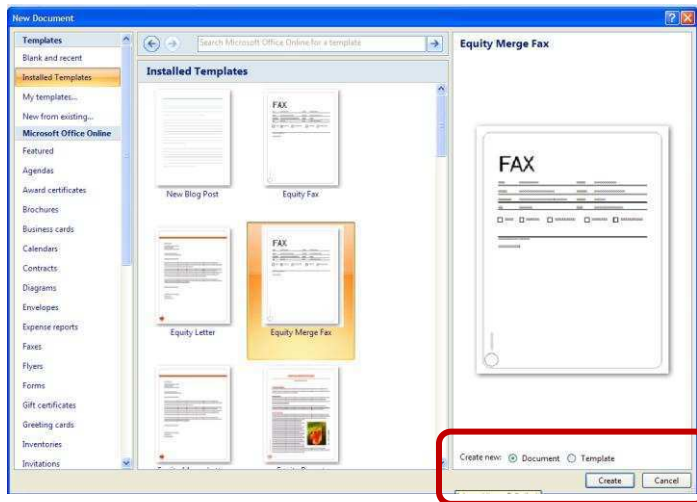
1. Click the **Microsoft Office Button**, and click **New**.



2. Click **Installed Templates**.



3. Click a thumbnail for the template you want. Next to **Create new**, at the bottom right of the **New Document** window, make sure that **Document** is selected.

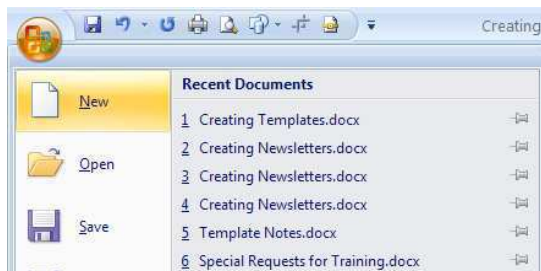


4. Click **Create**.

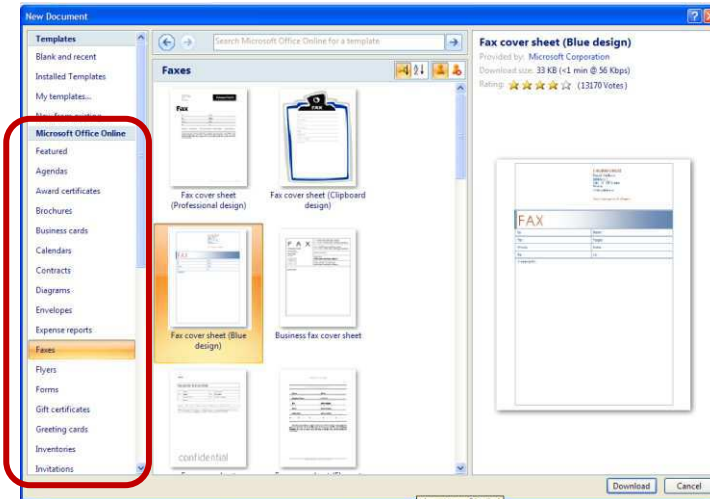
A new document opens that is based on the template. And that is a template's special power: *It opens up a copy of itself*, imparting everything it contains to a new, fresh document. You work in that new document, benefitting from everything that was built into the template, plus adding or deleting as needed. Because the new document is not the template itself, your changes are saved to the document, and the template is left in its original state. Therefore, one template can be the basis for an unlimited number of documents.

Using Templates on Office Online

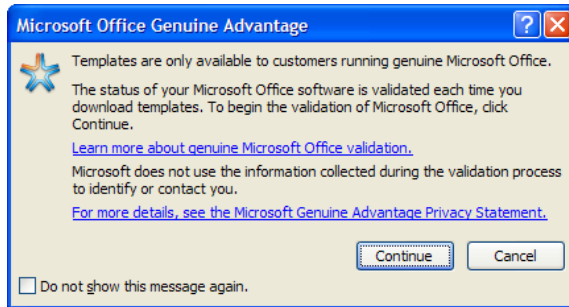
1. Click the **Microsoft Office Button**, and click **New**.



2. Under **Microsoft Office Online**, click a category.



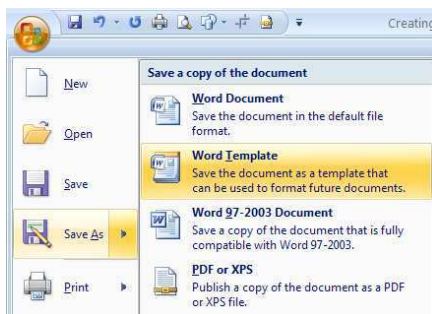
3. Click a thumbnail for the template you want, and click **Download**.
 - a. When you get a message titled **Microsoft Office Genuine Advantage**, click **Continue**. The Microsoft® Office Online site is checking to ensure that your copy of Microsoft Office is genuine.



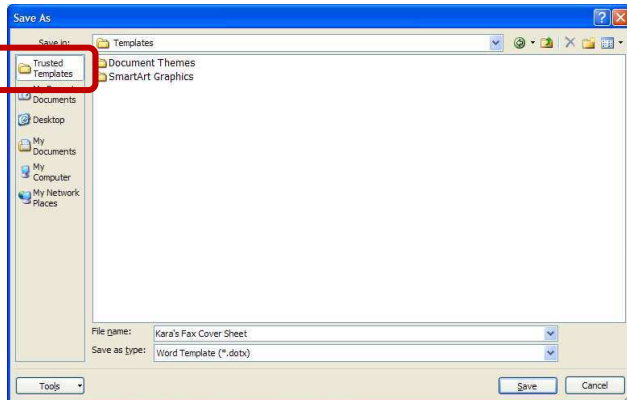
Saving a Document as a Template

There are times when you may already have a document that you want to turn into a template for future use.

1. Click the **Microsoft Office Button** , point to **Save As**, and click **Word Template**.




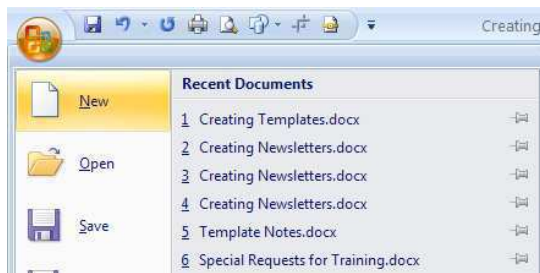
2. In the **Save As** dialog box, click **Trusted Templates**.



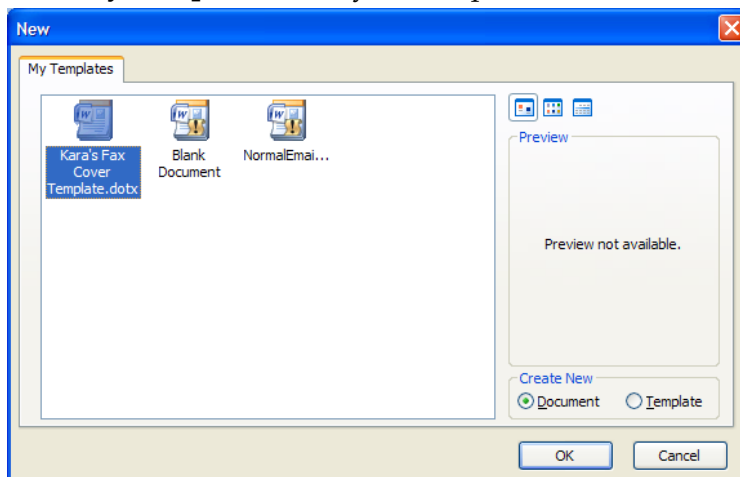
3. Type the **File name** that you want for the template (be sure to leave the file extension of .dotx, if it is showing).
 - a. The **Save as type** box should show **Word Template** (or **Word Template (*.dotx)**).

Finding and Using Your Templates

1. Click the **Microsoft Office Button** , and click **New**.



2. Click **My Templates**. Find your template and select it.

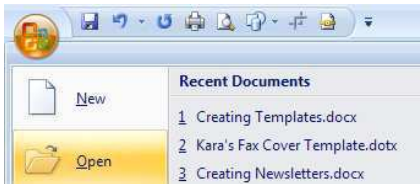


3. In the area at the bottom right, under **Create New**, the selected option should be **Document**.
4. Click **OK**.

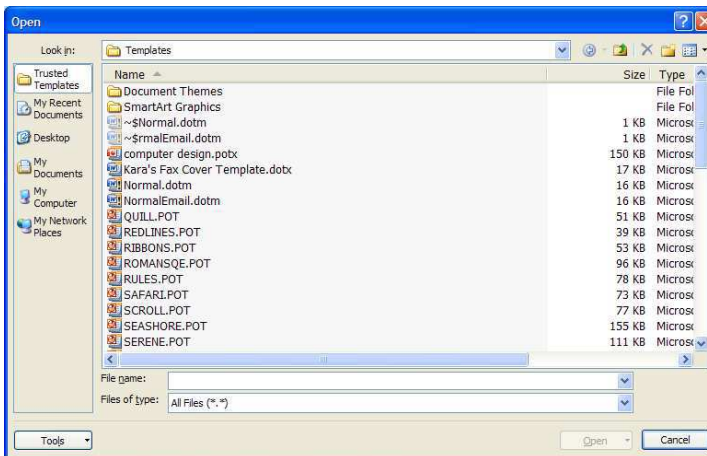
Edit the template

There may be times when you want to make a change to the template so that all future documents based on that template will have the most recent information.

1. Click the **Microsoft Office Button**  , and click **Open**.



2. Click **Trusted Templates**, the top folder on the left.



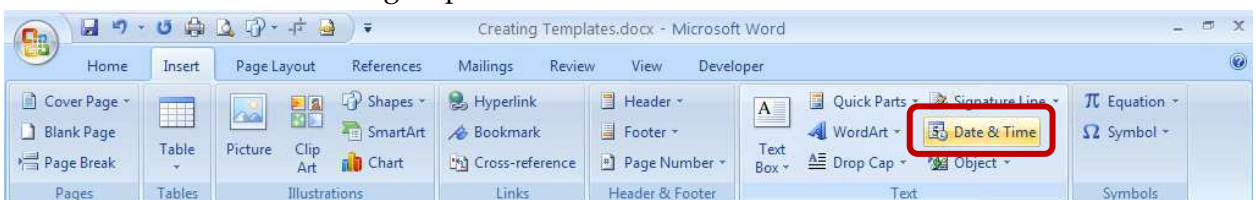
3. Find your template, select it, and click **Open**.

Spicing Up a Template

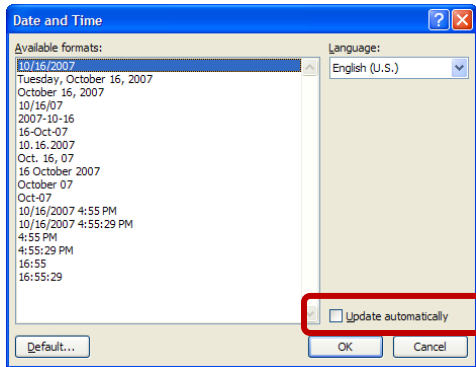
Additional elements can be used to enhance your template and make it even easier to use.

A date command can be added, which puts the current date and time into the document whenever it is opened.

1. Place your cursor in the document in the position you want for the date.
2. On the **Insert** tab, in the **Text** group, click **Date & Time**.



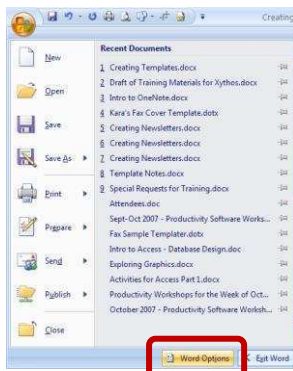
3. Select the type of format, and click **OK**.



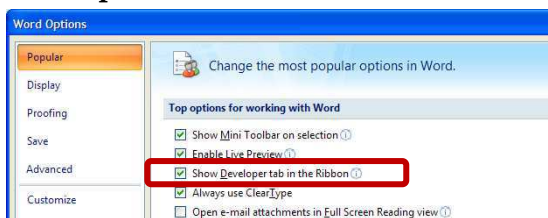
- a. If you want the date to update each time the document is opened, check the **Update automatically** box.
- b. If you want to change the format later, right-click the date command in the document, and click **Edit Field**.

Date and text controls are available on the **Developer** tab. This tab may need to be turned on. To display the Developer tab:

1. Click the **Microsoft Office Button** , and click **Word Options**.

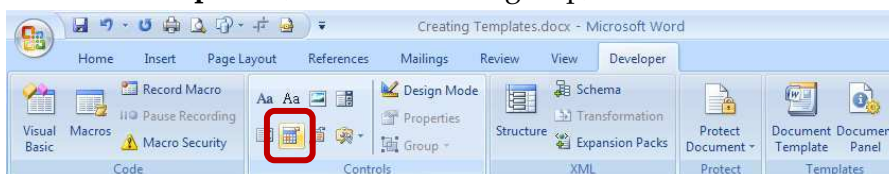


2. Popular options are shown at the top of the window. Select the check box next to **Show Developer tab in the Ribbon**, and click **OK**.

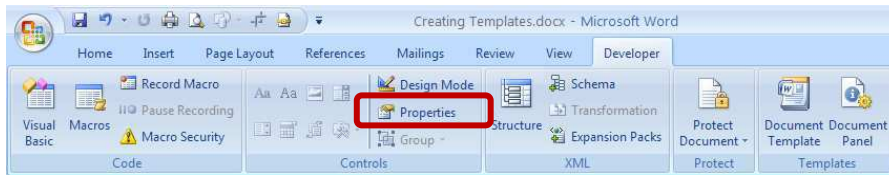


To add a Date Picker control:

1. On the **Developer** tab, in the **Controls** group, click **Date Picker**.



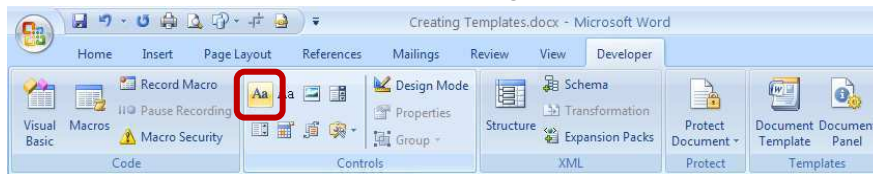
2. To select a format for the date, select the Date Picker control in the document, and on the **Developer** tab, click **Properties**.



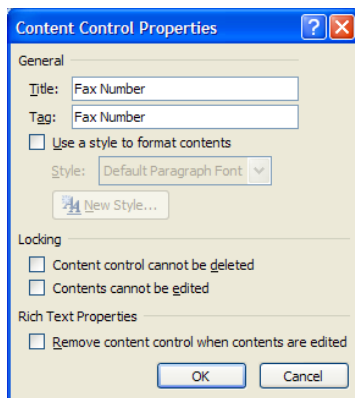
3. Click any of the examples in the list under **Display the date like this**. Click **OK**.

To add a Rich Text control:

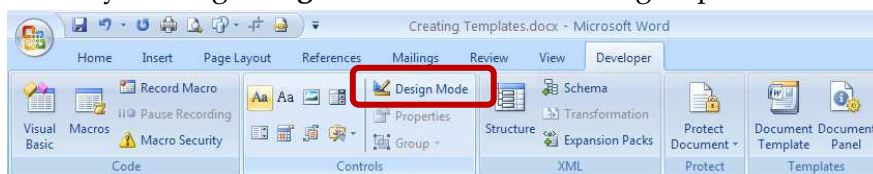
1. On the **Developer** tab, in the **Controls** group, click **Rich Text**.



2. To add a label that identifies the control, keep the control selected, and in the **Controls** group, click **Properties**.
3. In the **Content Control Properties** dialog box, type text next to **Title**, and click **OK**.



4. To change the instructional text ("Click here to enter text"), you need to turn on Design Mode by clicking **Design Mode**, in the **Controls** group.



5. You can then type over the instructional text in the control. Turn off **Design Mode** by clicking that button on the Ribbon.