Word 2010 Templates & Macros

Templates

Templates versus Documents

Word documents (*.docx or *.docm files) are based on document templates (*.dotx or *.dotm files). Default text, formatting, and graphics can be stored in templates, making it easy to quickly generate new documents based on standardized content and layouts. Each time a template is used to create a new document, a new .docx file is created.

Using a Template

To create a new document based on a template:
1. [Double Click] the template file.
Or
1. Choose FILE then NEW.
2. Select:
   - RECENT TEMPLATES: Recently opened.
   - SAMPLE TEMPLATES: Samples included with Word.
   - MY TEMPLATES: Created by you or your organization.
   - Or, to download from the regularly updated Office.com templates, select a category under OFFICE.COM TEMPLATES or type a keyword in the OFFICE.COM TEMPLATES search bar (e.g. business plan), then [Click] ➡.
3. [Click] CREATE (or OK, or DOWNLOAD).

Note: Creating a blank document creates a document based on the Normal template (Normal.dotm).

Creating a New Template

1. Create or open a document to be used as a template.
2. Modify the document.
3. Choose FILE then SAVE AS.
4. If necessary, change SAVE AS TYPE to WORD TEMPLATE.
5. Type the FILENAME for the template.
6. To have the template appear in your My Templates area, [Click] TEMPLATES (TRUSTED TEMPLATES for Windows XP) at the top of the left pane.
7. [Click] SAVE.

Editing a Template

[Double Clicking] a template file does not open the template, it creates a new document based on the template. To edit the template file:
1. [Right Click] the template file, then select OPEN.
Or
1. Choose FILE then OPEN.
2. Locate and select the template file. For My Templates, [Click] TEMPLATES (TRUSTED TEMPLATES for Windows XP) at the top of the left pane.
3. [Click] OPEN.

Adding a Workgroup Template Folder

Use a shared workgroup template folder for centralized access to document templates commonly used by your group or organization.
1. Choose FILE then OPTIONS.
2. Select ADVANCED, then [Click] FILE LOCATIONS… in the GENERAL section.
3. Select WORKGROUP TEMPLATES, then [Click] MODIFY.
4. Locate the shared folder, then [Click] OK.
5. [Click] OK, then OK.

Templates in the selected folder are added to My Templates.

Changing Which Template is Attached

Attaching a different template to a document makes available macros, shortcut keys, styles, Quick Parts, and Quick Access Toolbar customizations stored in the newly attached template.
1. Choose DEVELOPER, then DOCUMENT TEMPLATE. See **Showing the Developer Tab** if it is not visible.
2. Note the name under DOCUMENT TEMPLATE.
3. To attach a different template, [Click] ATTACH.
4. Locate and select the desired template. [Click] OPEN.
5. Check AUTOMATICALLY UPDATE DOCUMENT STYLES to use the styles from the newly attached template.
   Note: Changes to the styles in the attached template change the document unless this checkbox is cleared.
6. [Click] OK.

Changing Defaults in the Attached Template

To change the defaults for font, paragraph, and page settings in the current document's attached template (usually the Normal Template):
1. For font, choose HOME, then [Click] 🔲 in the FONT group.
   For paragraph, choose HOME, then [Click] 🔲 in the PARAGRAPH group.
   For page setup, choose PAGE LAYOUT, then [Click] 🔲 in the PAGE SETUP group.
2. Select font, paragraph, or page setup attributes.
3. [Click] the SET AS DEFAULT button.
4. For page setup, [Click] YES.
   For font and paragraph, select ALL DOCUMENTS BASED ON…, then [Click] OK.

Changing Elements in the Attached Template

- Quick Parts, keyboard shortcuts, Quick Access Toolbar customizations, and macros are saved and updated in the attached template (usually Normal.dotm) by default.
- To change default font, paragraph, and page settings, open a document based on the normal template (a new blank document will usually work), then follow the steps in **Changing Defaults in the Attached Template**.
- To change styles, follow these steps:
  1. Choose HOME, then [Right Click] on a Quick Style, or [Click] 🔲 in the STYLES group, then [Right Click] on a style.
  2. Select MODIFY.
  3. Select NEW DOCUMENTS BASED ON THIS TEMPLATE. [Click] OK.

Changing the Normal Template

Many elements of a document's attached template, including the Normal template (Word's default template), can be changed from within the document. For instructions, see **Changing Elements in the Attached Template**. To directly change the Normal template, follow these steps:
1. Choose FILE then OPEN.
2. [Click] TEMPLATES at the top of the left pane.
3. Select **Normal.dotm** and [Click] OPEN.
4. Make desired changes.
5. Save and close the file.

Making Elements Available in All Documents: Using Global Templates

To have macros, shortcut keys, Quick Parts, and Quick Access Toolbar customizations available for all your files during a Word session, add a Global Template:
1. Choose DEVELOPER, then DOCUMENT TEMPLATE.
2. [Click] ADD.
3. Locate and select the template.
4. [Click] OK. The template appears in the GLOBAL TEMPLATES AND ADD-INS list.
5. Repeat steps 2 - 4 to add other templates to the list.

Removing a Global Template

1. Choose DEVELOPER, then DOCUMENT TEMPLATE.
2. Select the template to remove, then [Click] REMOVE. To only disable, but not remove the template, uncheck it. [Click] OK.

Organizing Macros and Styles in Templates and Documents

1. Choose DEVELOPER, then MACROS or DOCUMENT TEMPLATE.
2. [Click] ORGANIZER.
3. Select the STYLES or MACRO PROJECT ITEMS tab.
4. On one side, select the source template or document. To open another file, [Click] CLOSE FILE then [Click] OPEN FILE.
5. On the other side, select the destination file in the same way.
6. Select the style or the module that contains the macro to be copied. [Click] COPY.
7. If you then want to remove the original style or module in the source file, [Click] DELETE, then YES to confirm.
8. You can also use RENAME to change a style or module name (e.g. if the same name is already being used in the destination file).
9. [Click] CLOSE when finished.

Inserting Fields with Options

Fields play a powerful part in templates. They allow for the automation of such things as page numbering, calculations and dates.
1. Place your cursor where the field information is to go.
2. Choose INSERT, then QUICKPARTS, then FIELD.
3. Select a category and a field name within that category.
4. Change FIELD PROPERTIES and FIELD OPTIONS as necessary. For more detailed options, [Click] FIELD CODES, then OPTIONS. [Click] OK.

Note: To manually edit a field, place your cursor in the field and press <Shift-F9> to display the field codes. When you are done, press <Shift-F9> to toggle the field back.

Including Building Blocks in a Template

Building Blocks are usually stored in "Building Blocks.dotx". Building blocks stored in your Building Blocks.dotx are not accessible on other users' computers, including when the file is sent by email. To move a Building Block to your template file for use by others:
1. Open the template file. If creating a new template file, save the file before continuing.
2. Choose INSERT, then QUICKPARTS, then BUILDING BLOCKS ORGANIZER.
3. Select the Building Block to move, then [Click] EDIT PROPERTIES.
4. Change SAVE IN to be your open template file.
   Note: Your template will only appear in the SAVE IN list if it has already been saved as a template.
5. [Click] OK then [Click] YES.
6. Repeat steps 3 to 5 to move additional Building Blocks. [Click] CLOSE when done.

Copying Building Blocks between Templates

1. Insert the Building Block into a document as usual.
2. Select the inserted text and graphics.
3. Copy, then Paste into the destination template file.
4. Select the pasted text and graphics.
5. Choose INSERT, then QUICKPARTS, then SAVE SELECTION TO QUICK PART GALLERY.
6. Fill in the details of the Building Block. Use GENERAL as the CATEGORY to access building blocks from the QUICK PARTS menu.
7. Change SAVE IN to be the destination template file. [Click] OK.