

# Microsoft® Word: Templates and Styles

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*A Workshop for San Diego State University Faculty and Staff*



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## Where to Find Help When You Need It

### *Help from your Division/College's Computer Consultant*

Some divisions and colleges have computer consultants assigned to them. You can contact these consultants when you need help. To determine if you have a consultant assigned to your division or college, look to: <http://rohan.sdsu.edu/~facstaff>

### *Help from the BATS Web Page*

BATS (Baseline Access, Training and Support) is a California State University initiative to provide all students, faculty, and staff with "baseline" access to information resources via networks, training in the uses of baseline hardware and software systems, and ongoing professional and technical support for utilization of computer resources at San Diego State University. You can access the BATS Web Page by pointing your browser to: <http://rohan.sdsu.edu/~bats/>

### *Help in the San Diego State University, Faculty Room*

The Faculty Room is staffed Monday through Friday with computing consultants who will try to answer your questions.

**Location:** Adams Humanities, 1109  
**Phone Number:** x45727  
**Semester Hours:** 7:30am – 6:00pm Monday -Thursday  
7:30am – 4:30pm Friday  
**Semester Intersession:** 7:30am – 4:30pm Monday – Friday

### *Help from the Faculty Computing Help Line*

**Phone Number:** x41348      **E-mail:** [helpline@mail.sdsu.edu](mailto:helpline@mail.sdsu.edu)  
**Semester Hours:** 7:30am – 6:00pm Monday – Thursday  
7:30am – 4:30pm Friday  
**Semester Intersession:** 7:30am – 4:30pm Monday – Friday

### *Help from the Staff Computing Help Line*

**Phone Number:** x40824      **E-mail:** [staffhelp@sdsu.edu](mailto:staffhelp@sdsu.edu)  
**Semester Hours:** 7:30am – 6:00pm Monday – Thursday  
7:30am – 4:30pm Friday  
**Semester Intersession:** 7:30am – 4:30pm Monday – Friday

## **MS Word: Templates & Styles**

Have you ever been confused trying to figure out how templates and styles work in MS Word? With a template you can store "boilerplate" text to save you time. Styles define the appearance of various text elements of your document. When you apply a style to a paragraph or word, you can apply a whole group of character or paragraph formats in one simple operation. In this workshop you will learn all about how to use templates and styles to improve the speed and efficiency of your word processing work.

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## What is a Template?

A template stores frequently used text and styles. If you use templates you are working more efficiently because you do not have to re-create the formatting and text of the documents you use most often. For example, by making your department facsimile cover letter into a template, you only need to type in that text and formatting which changes from fax to fax, not the information which stays the same - or the "boilerplate" information.

## Creating a Template

The easiest way to create a template is by opening a document that contains the text and formatting you want to reuse and saving it as a template (be sure to delete the text and formatting which changes from document to document).

1. Click **Open** on the **File** menu, and then open the document you want.
2. On the **File** menu, click **Save As**.
3. In the Save as type box, click Document Template (\*.dot).
4. Word proposes the **Templates folder** in the Save in box.
5. Click, **Save**.

## Modifying a Template

1. Click **New** on the **File** menu.
2. Choose a template that is similar to the one you want to create.
3. Click **Template** under **Create New**, and then click **OK**.
4. On the **File** menu, click **Save As**.
5. In the **Save as type** box, click **Document Template** (\*.dot). This file type will already be selected if you are saving a file that you created as a template.
6. Click **OK**
7. In the new template, **add** the text and graphics you want to appear in all new documents that you base on the template, and **delete** any items you do not want to appear.
8. Make the **changes** you want to the margin settings, page size and orientation, styles, and other formats.
9. Click **Save**, and then click **Close** on the **File** menu.

## Where to Save Your Templates

If you save a template in the Templates folder, the template will appear on the General tab when you click New on the File menu. If you save a template in a subfolder of the Templates folder, such as Memos or Reports, the template will appear on the corresponding tab when you click the New command.

1. On the **File** menu, click **Save As**.
2. Word proposes the Templates folder in the Save in box. To save the template so that it will appear on a tab other than General, switch to the corresponding subfolder within the Templates folder.
3. In the **File name box**, **type a name** for the new template.
4. Click **Save**.

## Understanding the Normal (normal.dot) Template

The Normal template is a general-purpose template for any type of document. When you start Word or click New, Word creates a new blank document that is based on the Normal template. You can modify this template to change the default document formatting or content. Word also uses the Normal template to store the AutoText entries, macros, toolbars, and custom menu settings and shortcut keys you routinely use. Customized items that you store in the Normal template are available for use with any document.

You should store the Normal template in the Templates folder. If Word can not find the Normal template in any of these locations or in your Word program folder, it creates a new Normal template with the standard Word document formats and the standard menu, toolbar, and shortcut key settings.

## How to Use Fields in Your Templates

Fields are used as **placeholders for data** that might change in a document. Some of the most common fields are the PAGE field, which is inserted when you add page numbers, and the DATE field, which is inserted when you click Date and Time on the Insert menu and then select the Update automatically check box. Fields are also inserted automatically when you create an index or table of contents by using the Index and Tables command on the Insert menu.

Field codes appear between curly brackets, or braces ( { } ). To display the results of field codes - such as the results of calculations - hide the field codes: click **Options** on the **Tools** menu, click the **View** tab, and then clear the **Field codes** check box. *Fields are somewhat like formulas in Microsoft Excel* - the field code is like the formula, and the field result is like the value that the formula produces.

## Useful Fields for Template Forms

The following fields insert a check box, a drop-down list, or a text box in a form.

{ FORMCHECKBOX }  
{ FORMDROPDOWN }  
{ FORMTEXT }

You cannot insert or modify these fields directly. They are inserted by the Check Box Form Field, Text Form Field, and Drop-Down Form Field buttons on the **Forms toolbar**. To edit these fields, you must use the **Form Field Options** button on the Forms toolbar. To activate the Forms toolbar, choose the following.

1. Click, **View**.
2. Choose, **Toolbars**.
3. Choose, **Forms**.

Note that in order for a Field to work properly, it must be “**locked down**.”

When you are creating your template and using fields, you can use the **lock icon** on the Forms toolbar to “test” what you have done. When you are ready to finalize your document, you must designate which parts of the template (those parts with fields) that need to be locked down by **separating** them with **continuous section breaks**. Once you have done this, choose the following.



1. Click, **Tools**.
2. Choose, Protect Document.
3. Choose, Protect Document for Forms.
4. Click on the **Sections** button.
5. **Check** those sections you would like protected, or locked down (all those sections, which contain fields).

## What is a Style?

Styles make formatting your document easier. Not only can styles help you make sure all of your documents look consistent, they dramatically reduce the time it takes to format a document.

A style is a series of formats that can automatically be applied to either a paragraph or specific characters. Instead of applying formats one at a time, when you choose a style, Word automatically applies all the formatting for you. If you want to change the appearance of your entire document, all you have to do is change the styles.

Additionally, styles are the building blocks for outlines and tables of contents. Word automatically creates a table of contents based on your headings when you click the Table of Contents command on the Insert menu.

## Applying an Existing Style

Word has over 90 built-in styles available for you to use. The fastest way to add styles to your document is to use the ones that already exist.

1. Select the **text** you want to add a style to.
2. Choose the style you want from the **Style box** on the **Formatting** toolbar.

Note that in the Style box the style appears formatted so that you can see what that style looks like before you apply it.

## Creating New Styles

The quickest way to create a new paragraph style is to format a paragraph, select it, and then **base** the new style **on** the formatting and other properties applied to the **selected text**.

1. Select the **text** that contains the formatting you want to include in your style.
2. Click in the **Style box**.
3. Type the **new style name** in the **Style box**.
4. Press **Enter**.

## Creating Styles Automatically as You Type

Word can create styles automatically as you type, when the **Define styles based on your formatting** check box (**Tools** menu, **AutoCorrect** command, **AutoFormat As You Type** tab) is selected. Word detects the type of formatting and the placement of your text and applies styles associated with that formatting. For example, if you type a few words on a single line, increase the font size, and center the line, Word can automatically apply a heading style.

## Modifying a Style

Advanced style capabilities are available from at the Style control panel. To get to this panel, on the **Format** menu, click **Style**. To modify an existing Style, complete the following.

1. On the **Format** menu, click **Style**.
2. In the **Styles** box, select the style you want to modify, and then click **Modify**.
3. Click **Format**, and then click the attribute - such as Font or Numbering -you want to change.
4. Click **OK** after you have changed each attribute, and then repeat for any additional attributes you want to change.

To use the modified style in new documents based on the same template, select the Add to template check box. Word adds the modified style to the template that is attached to the active document.

## Storing Your Style System: Using the Style Organizer & Templates

Once you have created a set of styles that you like, you can add those styles to the Normal template, so that in all of your documents these styles are the default styles available. Once you have modified your styles complete the following.

1. Choose **Format, Style**.
2. Choose **Organizer**.
3. In the left-hand window are those Styles available to you in your current document. **Highlight** those Styles you would like to make available in the Normal template, click **Copy**. These styles will copy to the right hand window, or the Normal template.

If you would prefer to create your own template, once you have modified your styles complete the following.

1. Select **all** of your **text** in the document, and **delete**.
2. Choose **File, Save As**.
3. Save the document as type, **template (.dot)**.
4. Give the document a **name**, ("joesstyles").
5. Click **Ok**.
6. Open this template by selecting **File, New**. This template will contain the new styles you have created - a template you can work from whenever you want to use these styles.

## Creating a Table of Contents - Using Styles

To create a table of contents, **apply** the built-in **heading styles** (Heading 1 through Heading 9) to the headings you want to include in the table of contents.

Once you have applied the styles, you can choose a design and build the finished table of contents. When you build a table of contents, Word searches for headings with the specified styles, sorts them by heading level, references their page numbers, and displays the table of contents in the document.

1. Choose Insert, Index, and Tables.
2. Choose the **Table of Contents** tab.

3. Click **Options** to define the level within the TOC assigned to each style.
4. Choose a **Format** for the TOC.
5. Click **OK**.
6. Once you have created your TOC, if your TOC changes you can update it by **pointing** to it and **right-clicking**. Choose **Update Fields**.

## **Deleting a Style**

To delete a style, complete the following.

1. On the **Format** menu, click **Style**.
2. In the **Styles box**, click the style you want to delete, and then click **Delete**.

Once a style is deleted, Word applies the Normal style to all paragraphs formatted with that style and then removes the style definition from the template. The Normal built in Heading styles are always present in the Styles list, and you cannot delete them.

## **Congratulations!**

You have completed MS Word: Templates & Style for Faculty and Staff at SDSU. Please feel free to contact your instructor if you have any questions on material covered during this workshop. Also, please feel free to take advantage of the help resources listed at the beginning of this handout.