

Microsoft® Word 2003 Templates and Styles

A Workshop for San Diego State University Faculty and Staff



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
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
Semester Hours: 7:30am – 6:00pm Monday – Thursday
7:30am – 4:30pm Friday
Semester Intersession: 7:30am – 4:30pm Monday – Friday

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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

Create a Template

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

To create a template:

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 opens the **Templates folder** in the Save in box.
5. If you haven't already created a folder for your templates, click on the **New Folder icon** and name the folder. It will then be shown in the Templates window.
6. Click, **Save**.



Modify a Template

To modify an existing template:

1. Click on **File** on the Menu Bar and then click **New**.
2. Choose the location of the template from the **Task Pane**.
3. Choose a template that is similar to the one you want to create.
4. Click **Template** in the **Create New** area, and then click **OK**.
5. On the **File** menu, click **Save As**.

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6. 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.
7. Click **OK**
8. 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.
9. Make the **changes** you want to the margin settings, page size and orientation, styles, and other formats.
10. 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**.

The (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.

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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.

Field Codes

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.

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**.

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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 needs 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. When the Task Bar appears click on the check box that reads **“Allow only this type of editing in the document”**.
4. A drop down menu will be activated and you should select **Filling in forms**.
5. Click on **Select Sections** and a window will open listing the different sections in your form.
6. Check the sections that you want to be protected and click on **OK**.
7. Once the settings have been made click on **Yes, Start Enforcing Protection**.
8. You will be offered the opportunity to assign a password to the form. A password is optional.
9. Click on **OK** and the form will be protected.

WHAT IS A STYLE?

Styles make formatting your document easier. Not only can styles help you make sure all of your documents have a consistent look, 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.

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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 can automatically create a table of contents based on your headings.

Applying an Existing Style

Word has over 100 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.

To apply a style:

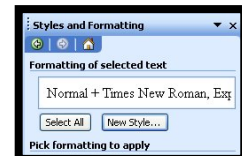
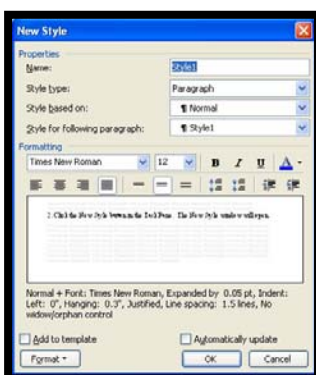
1. Select the **text** you want to add a style to.
2. Click on **Format** on the Menu Bar and choose **Styles and Formatting**. The Task Pane will open.
3. At the bottom of the Task Pane select **All Styles** in the Show window.
4. Click on the style you want, and the text in your document takes on all the formatting of the selected style.

Note that in the Task Pane 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. Click on **Format** on the Menu Bar and choose **Styles and Formatting**.
2. Select the **text** that contains the formatting you want to include in your style.
3. Click the **New Style** button in the Task Pane. The New Style window will open.
4. Type the **new style name** in the **Name box**.
5. Press **Enter**.



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Modifying a Style

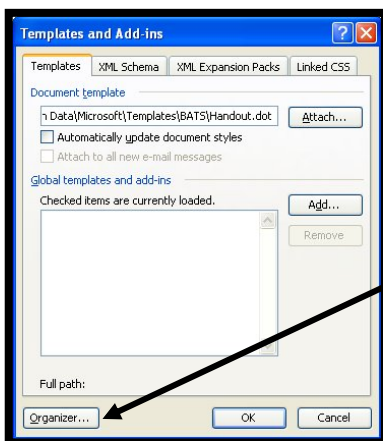
Advanced style capabilities are available on the Task Pane. To open the Task Pane, choose **Format** from the Menu Bar and then click on **Styles and Formatting**.

1. Hover over the style you want to modify, and then click on the downward pointing arrow on the right of the style.
2. Choose **Modify**.
3. Select the attributes - such as Font or Numbering -you want to change.
4. Click **OK** after you have changed the attributes.

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.

Using the Style Organizer

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. Click on **Tools** on the Menu Bar and choose **Templates and Addins**.
2. Click on the **Templates** tab and then click on **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.

Deleting a Style

To delete a style:

1. Hover over the style you want to delete, and then click on the downward pointing arrow on the right of the style.
2. Choose **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.

TABLE OF CONTENTS

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. From the Menu Bar choose **Insert, Reference** then click on **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.
4. Click **OK** then click **OK** again.
5. Once you have created your TOC, if your TOC changes you can update it by **pointing** to it and **right-clicking**. Choose **Update Fields**.