Using Templates in MS Word 2007

This short instruction guide will help you save time and get a jumpstart on your documents by using templates.

What are Templates?

A template is a document that contains predefined text, styles, and formatting information. You can use a template over and over to produce consistent output and save time.

Why use Templates?

Templates will save time on jobs you do frequently, such as faxes, meeting agendas, customer billing, and newsletters. Using templates means you don't have to reinvent the same document every time you need it.

How to use Templates

There are three main ways to use templates in Microsoft Word 2007:

- Use predefined templates which are built-in or download additional templates from the Office website.
- Create your own templates from scratch.
- Create templates from existing documents.
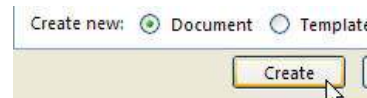
Using Built-in Templates

1. Click the **Office Button**,

   then click **New**.
2. Click **Installed Templates**.
3. Click a thumbnail for a preview.
4. Select **Document** in the bottom right of the **New Document** window and click **Create**.


Word will now open a copy of the selected template that you can edit and save as your own document.

Using Online Templates

You are not limited to using only the templates that came with your installation of Word 2007. You may select from hundreds of templates listed on the Office 2007 website.

1. Click on the **Office Button**, and click **New**.
2. Under **Microsoft Office Online**, select a category.
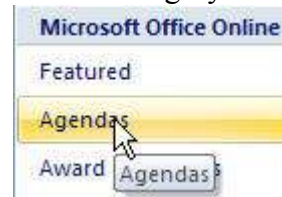

You will be taken to the Office website.

3. Click on a thumbnail to preview templates and click **Download**.

You now have a local copy of this template under **My Templates**.

Creating Templates from Scratch or from Existing Documents

Each of these options uses similar steps; the difference is whether you create a new document layout or open one that you previously designed. Either way, you must save the document as a template:

1. Click on the **Office Button** , point to **Save As**, and click **Word Template**.
2. Click **Trusted Templates** in the **Save As** dialog box.
   Note: this option is called **Templates** in Windows Vista.
3. Type in the file name you wish to call your template:
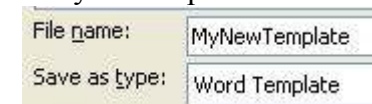
Note:

- Placing a template in the **Trusted Templates** tells Word that it is safe to open even if it contains macros or other code.
- You can save templates as Word 2007, Word 97-2003, or Word Macro-Enabled templates.

Creating Templates from Scratch or from Existing Documents, Continued ...

Creating templates is easier in Word 2007 if you enable the **Developer Tab**.

Enabling the Developer Tab

1. Click on the **Office Button**, and click **Word Options**.
2. Select the check box next to the **Show Developer tab in the Ribbon**, and then click **OK**.

Note: Documents created in earlier versions of Word must be converted to a Word 2007 document to be able to use the Developer tab.

Adding Date and Text Areas to a Template

The following instructions assume you have enabled the Developer tab (see instructions above). Adding date and text controls is not required, but they make your template easier to reuse.

Add a Date Control

1. Position your cursor where you want to insert the date.
2. In the **Controls** group on the **Developer** tab, click **Date Picker**.

3. To select a new date format, select the **Date Picker** control in your document and click **Properties** on the **Developer** tab.
4. Click on one of the examples in the list under **Display data like this**.
5. Click **OK**.

Add a Text Control

1. Position your cursor where you want to insert a text control.
2. In the **Controls** group on the **Developer** tab, click **Rich Text**.
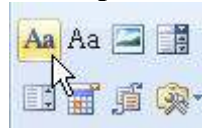
   Note: **Plain Text** is another option for a text control.

3. Keep the control selected and click **Properties** on the **Developer** tab to add a label, tag, or change font style.
4. Click on **Design Mode** above **Properties** to change the "Click here to enter text" instructions.
5. When done, click **OK**.

Using your Templates

Once you've created a template you can reuse it as often as needed.

1. Click the **Office Button**, and click **New**.
2. Click **My Templates**. Find the desired template and select it.
3. Select **Document** option under **Create New** in the lower right-hand corner. Click **OK**.

Editing a Template

You can edit and update your templates as often as required.

1. Click on the **Office Button**, and click **New**.
2. Find the desired template and select it.
3. Select the **Template** option under **Create New** in the lower right-hand corner. Click **OK**.

Be sure to resave your updated template or save another copy under a new name.

Additional Resources

- Built-in help: click on the help button inside Word 2007,
- Find templates online at: office.microsoft.com/en-us/templates
- Online templates tutorial at: office.microsoft.com/en-us/word enter "saving time with templates" in the **Search** box.