Creating a Document Template

A template is like a mold for Word documents; it contains formatting options and document properties that you can use again and again when creating new documents. In fact, every Word document is based on a template.

There are so many templates available in Office that you will rarely need to create one of your own.

However, if you find yourself applying and creating the same properties, features, or content each time you create a new document, you can save yourself some time by using a template.

Templates can contain the following information:

Text	Tables and graphics	Formatting
Styles*	Macros*	Building Blocks
Toolbars*	Ribbon Tabs	Keystroke shortcuts

Can be copied between documents and/or templates.

☐ Create a new blank document. Or, open a document that you want to use as the template.

Remember that everything that appears in the document will appear in the template.

If you have added macros, building blocks, or styles, they are also included in the template.

☐ Click the **File** tab and click **Save As**.

The Save As dialog box appears.

☐ Click the **Templates** folder under Microsoft Word. This is the default location for templates.

As long as templates are saved here, they will be easy to find in the New Document dialog box.

☐ Click the **Save as type** list arrow and select **Word Template** from the list.

You can also choose Macro-Enabled Template (.dotm).

☐ Click the **File name** text box and enter a name for the template.

The name should be something that is easily recognizable, that will be easy to identify later.

☐ Click **Save** to save the template.

The dialog box closes and the template is saved under My Templates.

Click the Templates folder to save a template in the correct location.
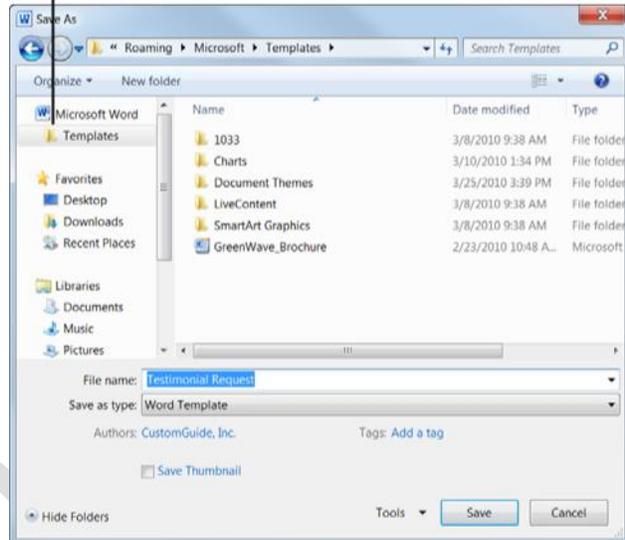

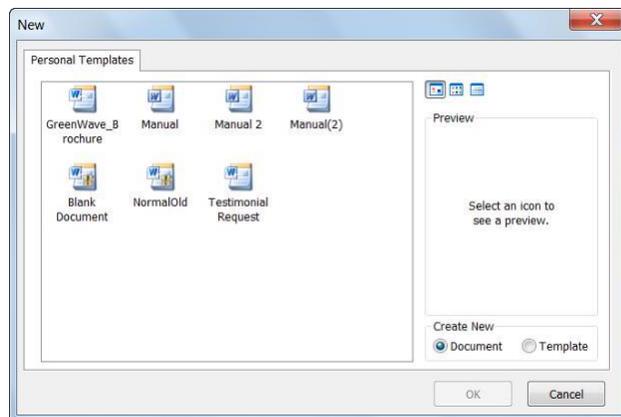**Figure 13-1:** The Templates folder in the Save As dialog box.

Figure 13-2: You can find your templates under My Templates.

✅ Tips

- ▪ Word uses a document template file named NORMAL.DOT as its default template to create blank documents. You can make changes to the Normal template.

Using a Document Template

Once a template has been made, it is very easy to create a new document based on the template. The most difficult part is finding the template you want to use.

Word 2010 organizes your document templates so it's easier to find the one you want to use.

☐ Click the **File** tab on the Ribbon and select **New**.

The New tab of Backstage view appears, displaying a list of available templates.

The table to the right, *Templates and Template Categories*, explains the choices under Available Templates.

☐ Select the template or template category you want to use.

Depending on the template or template category you choose, more templates or a dialog box appears.

✅ **Tip:** You can preview a template on the right side of the New tab.

☐ Click **Create, Download,** or

OK. Your template appears.

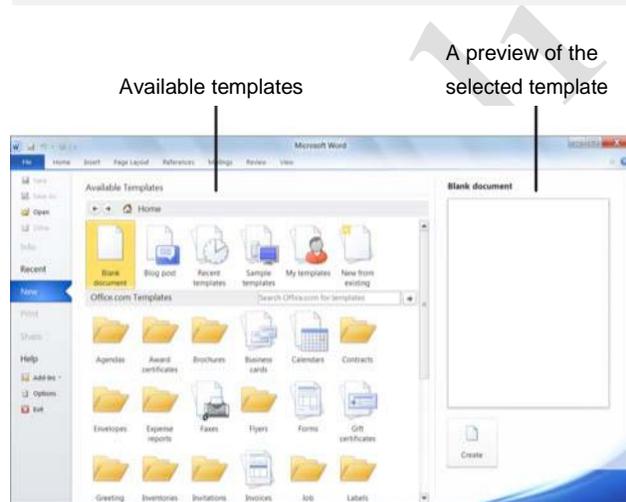Available templates   A preview of the selected template

Figure 13-3: The New tab displays several template choices under Available Templates

Table 13-1: Templates and Template Categories	
Blank document	Create a document from the default template.
Blog Post	Create a blog post from the default template.
Recent templates	Search recently used templates.
Sample templates	Search Word's sample templates.
My Templates	Search all the templates you have created or downloaded from Office.com.
New from existing	Create a new template from an existing document.
Office.com Templates	If you have an Internet connection, use Office.com to find and download new templates.

Creating Building Blocks

If you find yourself typing the same text again and again, or inserting the same types of tables or other objects, you could save a lot of time by using building blocks. Building blocks let you store the text and graphics you use frequently, such as a return address, company mission statement, or table design.

This lesson shows how to create building blocks from existing content and apply them to other documents.

☐ Select the content you want to save as a building block.

The content can include almost anything: text, formatting, tables, and images.

✅ **Tip:** The content you use to create a building block will be placed in the new document as is, including lines, logos, hyperlinks, and more.

☐ Click the **Insert** tab on the Ribbon and click the **Quick Parts** button in the Text group.

The Quick Parts menu appears, displaying quick parts you can work with in your documents.

☐ Select **Save Selection to Quick Part Gallery** from the list.

The Create New Building Block dialog box appears.

🔵 **Other Ways to Create a Building Block:** Press **<Alt>** + **<F3>**.

☐ Click the **Name** text box and enter a name for the building block.

The name should be something that is easy to recognize later on.

✅ **Tip:** You can use the Gallery and Category controls to assign the building block to a specific gallery or category. Enter text in the "Description" text box to describe the building block.

☐ Click the **Options** list arrow and select how you want the building block to be inserted.

By default the building blocks are inserted wherever the insertion point is located in the document. But you can also choose to insert the building block in its own paragraph or page.

☐ Click **OK**.

The building block is created.

▪ **Exercise**

☐ **Exercise File:** Agent Meeting13-3.docx

☐ **Exercise:** Create an "NST Logo" building block for North Shore Travel using the logo and North Shore Travel text at the top of the page.

Figure 13-4: Select the content you want to make into a building block.

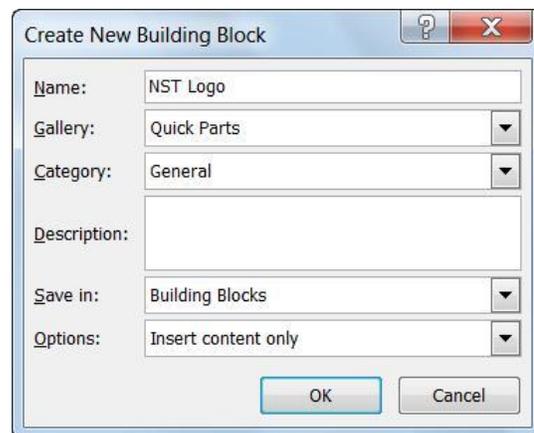**Figure 13-5:** Create a building block by saving it to the Quick Part Gallery.

Figure 13-6: Name the building block so that it is easily accessible. Use the other settings in this dialog box to specify how the building block will work in the document.

✅Tips

- By default, Word stores building blocks in a separate Building Blocks.dotx file, so that all building blocks are available in every document. However, you can save the building block in the current document or template by clicking the **Save in** list arrow and selecting the file in which you want to save the building block.

- You can also use building blocks to create and save headers, footers, watermarks, and much more!

Creating AutoText

If you've used previous versions of Word, you might have heard of a tool called AutoText. You can create AutoText for text and graphics you use frequently, such as a return address or canned paragraph. When you're ready to use the AutoText, all you need to do is type a few letters.

Word 2010 reintroduces AutoText as a special kind of building block. If you understand how to create a building block, creating AutoText is easy!

☐ Select the content you want to save as AutoText.

☐ Click the **Insert** tab on the Ribbon and click the **Quick Parts** button in the Text group.

The Quick Parts menu appears.

☐ Select **AutoText** from the list.

The AutoText Gallery appears.

☐ Select **Save Selection to AutoText Gallery** from the list.

The Create New Building Block dialog box appears.

✅ **Tip:** AutoText is a special type of building block that is saved in the AutoText Gallery.

☐ Click the **Name** text box and enter a name for the AutoText entry.

The name should be something unique that you can easily remember.

☐ Click the **Options** list arrow and select how you want the AutoText to be inserted.

By default AutoText is inserted wherever the insertion point is located in the document. But you can also choose to insert the AutoText in its own paragraph or page.

☐ Click **OK**.

The AutoText is created.

✅ **Tips**

▪ Word stores AutoText entries in template files (usually in the default NORMAL.DOTX), so that your AutoText entries are available in every document created from that template.

▪ **Exercise**

☐ **Exercise File:** Agent Meeting13-4.docx.

☐ **Exercise:** Type the following information directly beneth the North Shore Travel building block and create an AutoText entry for it called "nsadd":
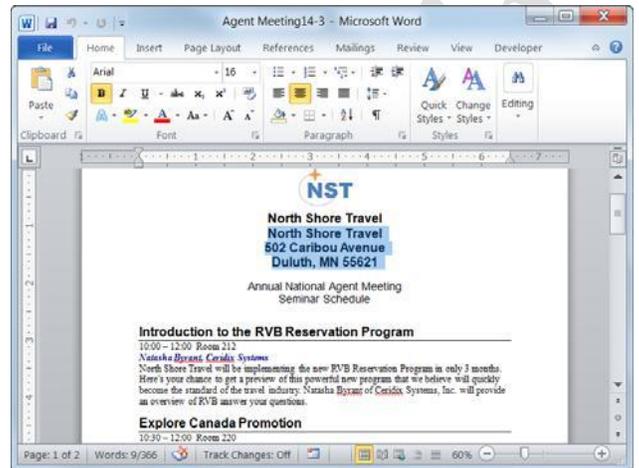
502 Caribou Avenue

Duluth, MN 55261

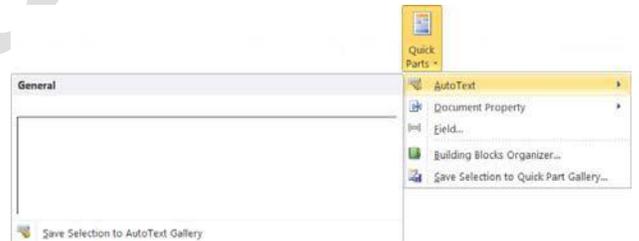**Figure 13-7:** Select the content you want to make into autotext.

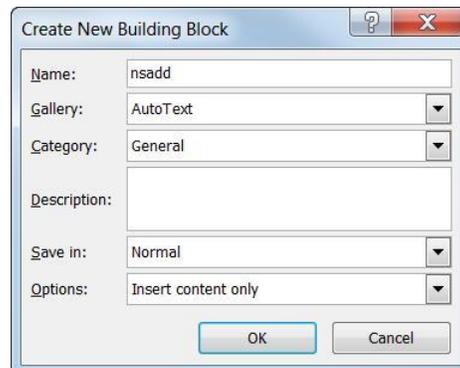**Figure 13-8:** AutoText is saved to the AutoText Gallery.

Figure 13-9: AutoText is saved to the AutoText Gallery in the Create New Building Block dialog box.

Using Building Blocks and AutoText

Once you have created building blocks and AutoText, the easy part is inserting the these tools into your documents.

Insert a building block

Building blocks are easy to find, preview, and insert into your document.

☐ Place your insertion point where you want to insert the building block.

☐ Click the **Insert** tab on the Ribbon and click the **Quick Parts** button in the Text group.

Any building blocks you have created appear in the Quick Parts list.

☐ Select the building block you want to insert in the document.

The building block is inserted.

🔸 **Other Ways to View and Insert Building Blocks:**
Click the **Insert** tab on the Ribbon and click the **Quick Parts** button in the Text group. Select **Building Blocks Organizer** from the list. You can preview, edit, delete, and insert building blocks from this dialog box.

Insert AutoText

AutoText is also easy to insert into a document.

☐ Place your insertion point where you want to insert the AutoText.

☐ Type the name of your AutoText. A

preview of the AutoText displays.

☐ Press **<Enter>**.

The AutoText is inserted.

🔸 **Other Ways to View and Insert AutoText:**
Click the **Insert** tab on the Ribbon and click the **Quick Parts** button in the Text group. Select **AutoText** from the list. Select the AutoText you wish to use.

▪ **Exercise**

☐ **Exercise File:** Agent Meeting13-5.docx

☐ **Exercise:** Add the "NST Logo" building block to the end of the document. Add the nsadd AutoText to the end of the document.

(NOTE: If you did not complete the Creating Building Blocks and Creating AutoText lessons before this lesson, you'll need to create the NST Logo building block and nsadd AutoText.)
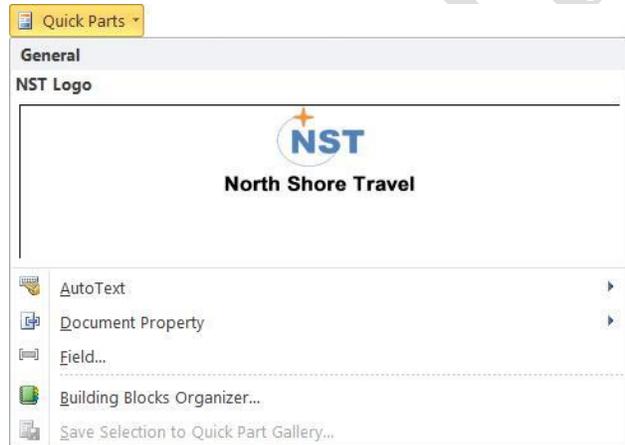

Figure 13-10: Select the building block you want to insert from the Quick Parts list.

Figure 13-11: When you type the name of an AutoText entry, a preview displays.
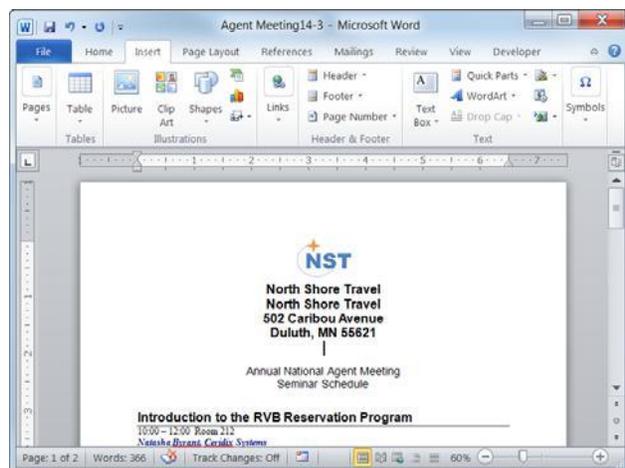

Figure 13-12: The building block and AutoText inserted in the document.

Attaching a Different Template to a Document

Unfortunately, customizations (styles, building blocks, macros, etc.) that you create in a template are only available in that template; they're not available in other templates. But you can work around this by attaching a template to a document. When you attach a template to a document, you use that template's styles, as well as its macros, building blocks, menus, toolbars, and shortcut keys.

This lesson explains how to attach a different template to a document, and how to update the current document's styles with the styles from the attached template.

☐ Click the **File** tab and click **Options**.

The Word Options dialog box appears.

☐ Click the **Add-Ins** tab.

The options for viewing and managing Microsoft Office add-ins appear.

☐ Click the **Manage** list arrow and select **Templates**. Click **Go**.

The Templates tab of the Templates and Add-ins dialog box appears.

☐ Click the **Attach** button.

The Attach Template dialog box appears. All your templates are normally stored in a special folder called Templates, located in the Microsoft Office folder. Word automatically opens this folder and displays only document templates when you click the Attach button.

✅ **Tip:** If the template you want to attach is saved elsewhere, navigate to that location on the computer and select the template.

☐ Select the template you want to attach to the document.

Now attach the template to the document.

☐ Click the **Open** button.

The file path of the template appears in the Attach text box.

If you want to use the styles in the attached template instead of the styles in the current document, you'll want to select the "Automatically update document styles" option.

Check to overwrite the document's styles with the attached template's styles.

Opens the **Organizer**, where you can copy individual styles from one document or template to another.
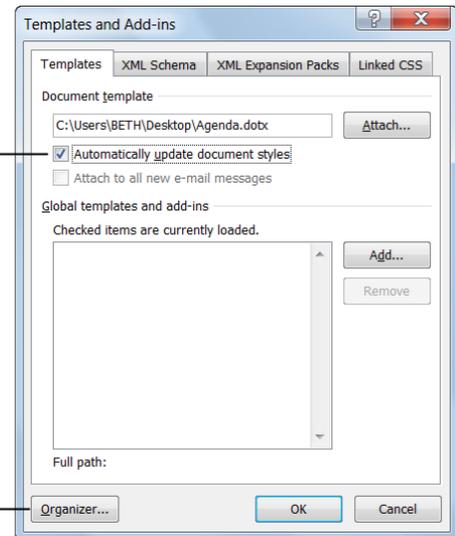

Figure 13-13: The Templates tab of the Templates and Add-ins dialog box.
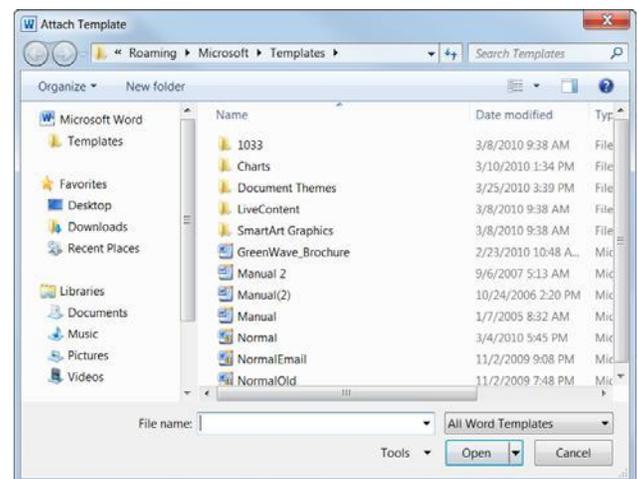

Figure 13-14: Select the template that contains the style(s) you want to copy to another document.

☐ Click the **Automatically update document styles**
   check box.

   This updates styles that have the same name between
   the template and the document. For example, if the
   document uses a style named "Command Text" and
   so does the template, the style in the document will
   be updated to appear as the style in the template.

☐ Click **OK**.

   The Templates and Add-ins dialog box closes and
   the document is updated with the attached template.
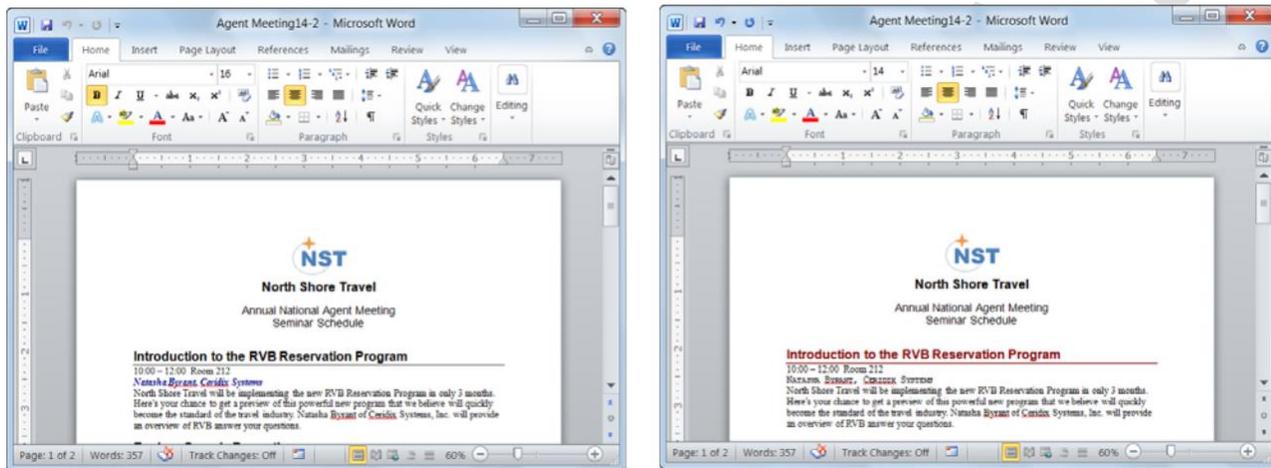
Figure 13-15: The document before and after the Agenda template is attached to it. Note the difference of style in
the headings and subheadings.

Copying Styles between Documents and Templates

Attaching a different template to a document allows you to use all the template's styles, macros, building blocks, menus, and shortcut keys in that document. Sometimes, however, you may only want to use a few styles from a template, and attaching a different template may be overkill.

This lesson explains how you can use the Organizer to copy styles between documents and templates (or between templates and templates).

☐ Click the **File** tab and click the **Options**

button. The Word Options dialog box appears.

☐ Click the **Add-Ins** tab.

The options for viewing and managing Microsoft Office add-ins appear.

☐ Click the **Manage** list arrow and select **Templates**. Click **Go**.
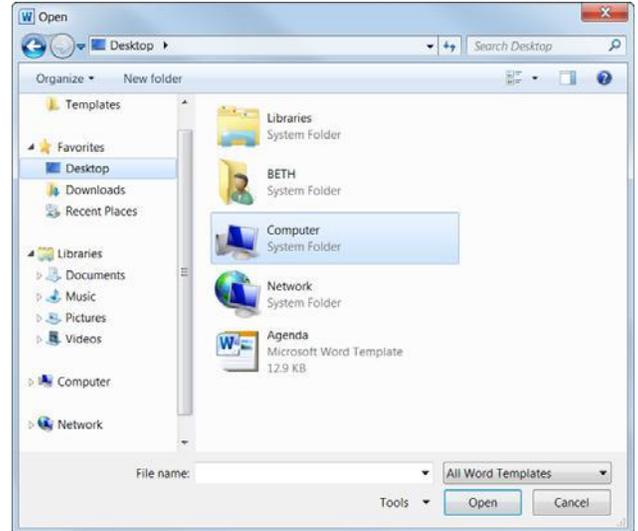
The Templates tab of the Templates and Add-ins dialog box appears.

☐ Click the **Organizer** button.

The Styles tab of the Organizer dialog box appears.

The left side of the dialog box displays the name and styles of the current document. The right side of the dialog box displays the name and styles of the currently attached template. You must close the current document or template before you can open a different one.

- **Exercise**

☐ **Exercise File:** Agent Meeting13-7docx and Agenda.dotx

☐ **Exercise:** Copy the "Seminar" style from the Agenda.dotx file into the Agent Meeting 14-1 document.

Figure 13-16: Select the template that contains the style(s) you want to copy into the document.

Lists styles in the document or template. Select the style you want to copy, delete, or rename.

Figure 13-17: The Styles tab of the Organizer dialog box.

Copies the selected style to the other document or template.

Deletes the selected style.

Renames the selected style.

If the file you want is not open, click **Close File**, then click **Open File** and open the file you want.

Make sure the files you want to copy the styles between are listed in these boxes.

☐ Click the **Close File** button of the file whose styles you don't want to use.

Now you need to find the document or template that contains the style you want to copy.

☐ Click the **Open File** button.

The Open dialog box appears.

☐ Navigate to the document or template that contains the style(s) you want to copy and click **Open**.

The styles of the document or template appear in the right side of the Organize dialog box.

☐ Select the style(s) you want to copy and click the **Copy** button.

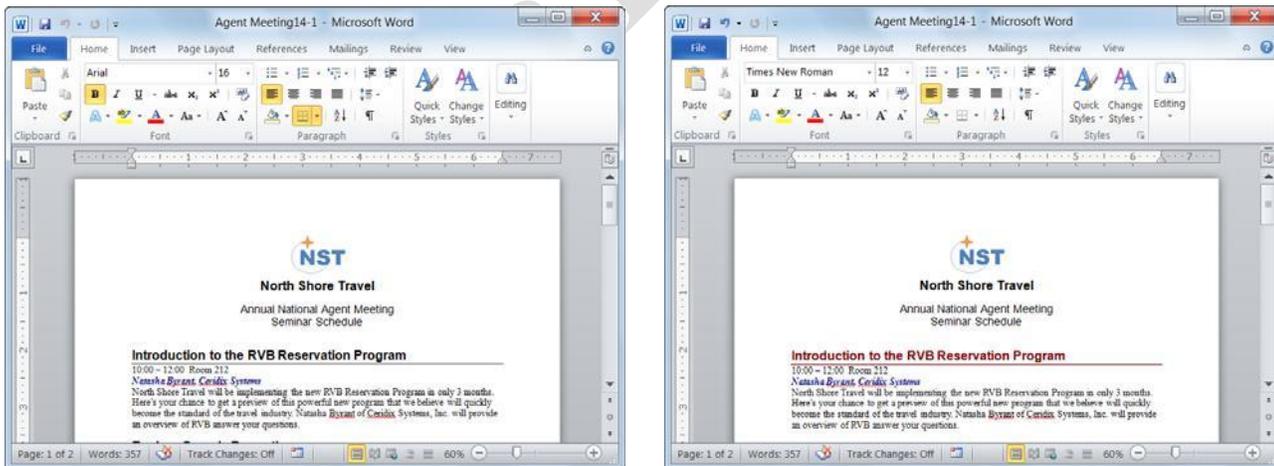✅ **Tip:** Use the **<Ctrl>** and **<Shift>** keys to select multiple styles at a time.

Once the styles are copied, into the document or template, you can close the Organizer.

☐ Click the **Close** button.

The Organizer dialog box closes and the styles are copied and updated in the document or template.
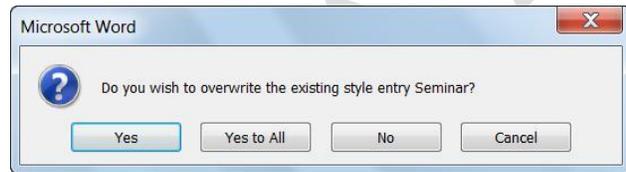
Figure 13-18: This dialog box appears if the style already exists in the document.

Figure 13-19: The document before and after the Seminar style is copied over. Note the difference of color in the headings that use the Seminar style.

Reference: **Custom Guide** Online Learning