

METHODS FOR USING TEMPLATES

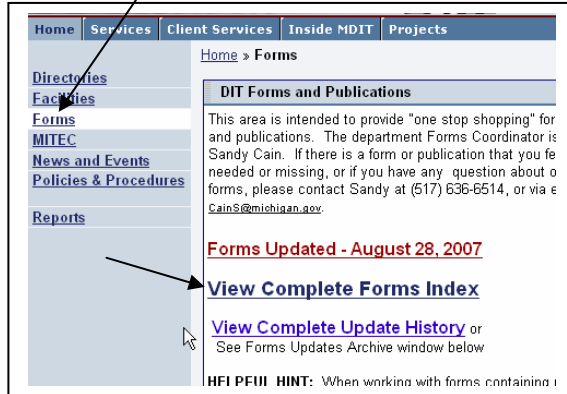
Microsoft Word allows automation of repetitive functions using macros. Toolbars are designed to enable the user to run the macro with a single click. The macros and toolbars are stored in the templates (.dot) itself. A document (.doc) created from a template **does not contain the macros/toolbars**, but knows the file location of the template (.dot) that created it. If the document cannot find the template in the location it was when the document was created, the macros and toolbars are no longer available to the document. Therefore, it is necessary to use the method described below for storing/working with the PMM/SEM templates:

DOWNLOADING AND STORING TEMPLATES

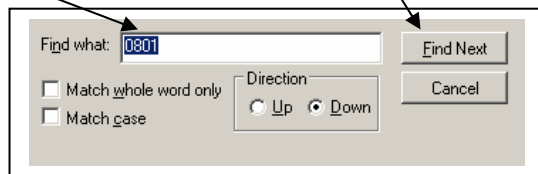
Store Templates (.dot) in a Common Location for all Staff

Every employee who will be using templates that will be shared with others **must** save the templates from the web to their hard drive using the following steps.

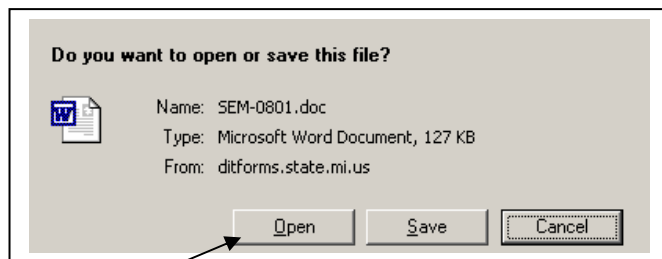
- ✓ Open Techtalk <http://connect.michigan.gov/portal/site/mdit>
- ✓ Click **Forms + View Complete Forms Index**



- ✓ Locate the desired PMM/SEM template by clicking **CTRL + F** + enter **desired form number** + click **Find Next**

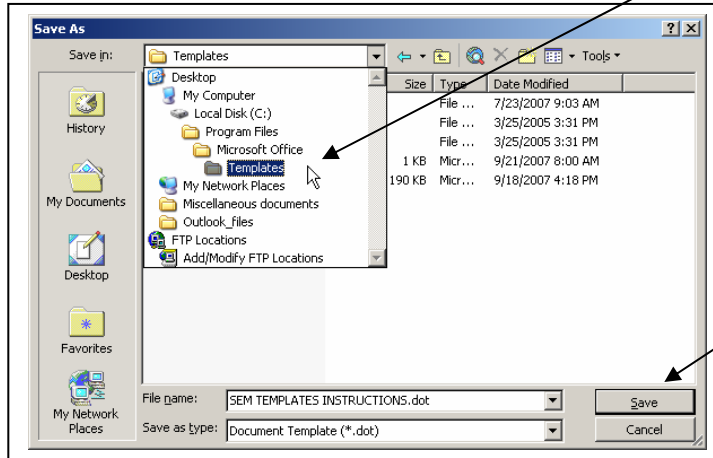


- ✓ Once you have found the desired form number, **click over the title** and the following will appear:



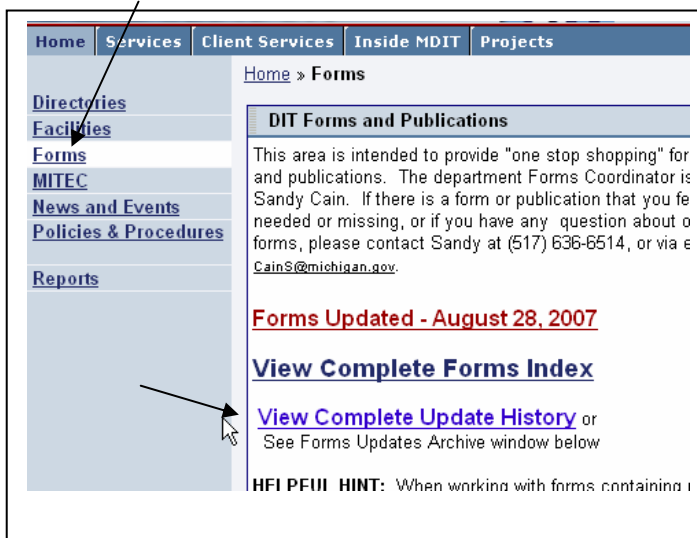
Click **Open**

After the form appears on your screen, click **File + SaveAs** + locate **C:/Program files/Microsoft Office/Templates** + click **Save**



NOTE: Some work areas may have a different location in which they store templates for common use. Since these shared locations may not allow individuals to write to them and may vary from work area to work area, we will use the location listed above for **user templates** which allow you to write to it and can be a **standard template location** for such as PMM/SEM for all work areas.

It is your responsibility to **check the TechTalk Forms website prior to starting a NEW project** to see if the templates you have stored are up-to-date. This is easily done by clicking View Complete Update History from the TechTalk forms page.

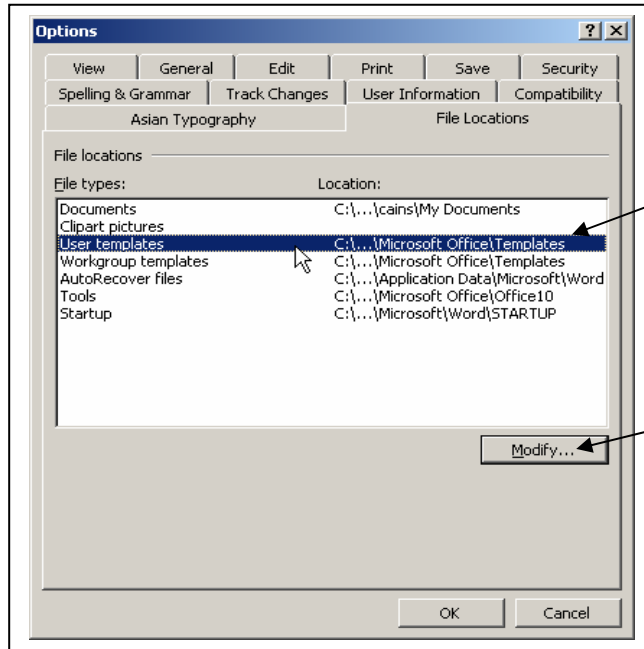


If a form(s) have been updated since the revision date on your stored copy, follow the above procedure and download to overwrite the old template.

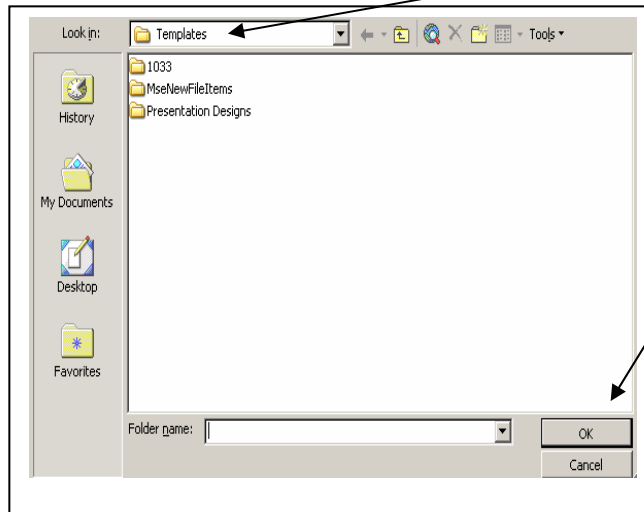
Setting the User Template Directory

Once you have saved all the templates to the above directory, you will need to set your User Templates directory to that location if it is not already set.

- ✓ Click **Tools + Options + File Locations + User templates + Modify +**



(locate the C:/Program files/Microsoft Office/Templates directory) + OK



OPENING DOCUMENTS FROM WORD

To open a **New** document to begin entering information:

- ✓ Open Word
- ✓ Click **File + New + locate the desired template + OK**
- ✓ Complete the document and **Save to the desired folder** for the project material.

NOTE: You may save the document to a shared directory on a server or on the web, so that others in your group are able to edit it.

To open an **existing** SEM project document for editing:

- ✓ Open Word
- ✓ Click **File + Open + (locate and select the desired document) + Open**

NOTE: If it was saved on your server or C:/ drive, you may edit directly from that location. If it is on the **web**, it will be necessary to **download it to your C:/** prior to editing.

USING SEM TEMPLATES

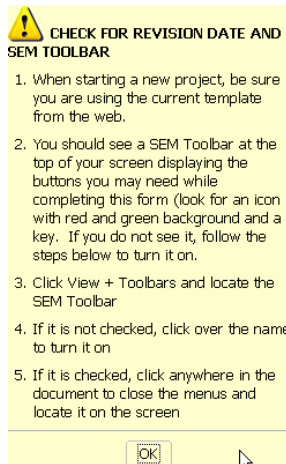
When you need to start a **New** document

- ✓ Open Word
- ✓ Click **File + New + locate the desired template + (double click the desired template)**

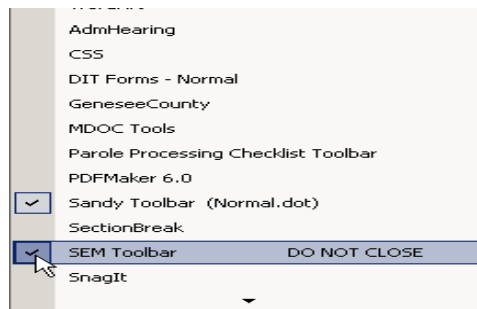
When you need to edit a saved document

- ✓ Open Word
- ✓ Click **File + OPEN + locate the desired document + Open**

When the document opens on the screen, you will also see a pop-up box containing instructions. This is a reminder to **use the most recent version** of the template when starting a new project. It is a good idea to check the revision date of the web template against the one stored on your C:/Program Files/Microsoft Office/Template directory prior to beginning. The pop-up also reminds you to locate/open the SEM Toolbar. You will need to click **OK** before you are able to work with the template.



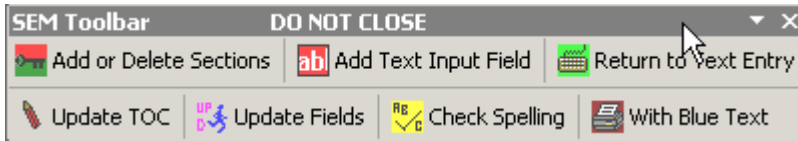
If you do not see the toolbar (see page 6 for picture), follow the instructions to click **View + Toolbars + locate the SEM Toolbar and click to place a check in front of it.**



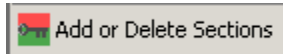
If it already is checked, the toolbar is open somewhere on your screen and you need to find it (probably hiding among the other toolbars showing at the top or bottom of the screen).

SEM Toolbar

There are a maximum of seven (7) buttons on the toolbar which activate macros to automate functions within the SEM templates.



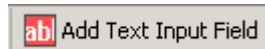
Macro Buttons



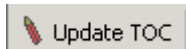
The purpose of the **Add or Delete Sections** button is to **unprotect the template** so that you are able to add/alter/delete information from any area in the template. This button should be used sparingly as it makes it possible to change boilerplate text you may not want changed. Make sure that you click on **Return to Text Entry** (see below) after you make the desired modification.



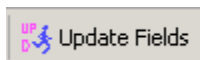
The **Return to Text Entry** button **re-protects the template** after you have unprotected it without removing already typed information. This enables you to continue input into text fields found in the templates. **Always** click this button after using the Add or Delete button to reset the template so the form fields and other toolbar buttons will work.



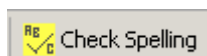
The **Add Text Input Field** enables you to enter a **Text Input Field** in a protected area of the template. This could be useful if you are adding a section of material which has variables that need to be filled in. **NOTE:** You must first click the "Add or Delete Sections" button or this button will not function.



The **Update TOC** button automatically updates the TOC with any new information that has been added or deleted during an edit cycle. Pushing this one button saves multiple steps.



The **Update Fields** button is used on templates that contain tables having calculation. Once you have completed the variable information in the table, clicking the Update Fields button will **complete the calculations in the table.**

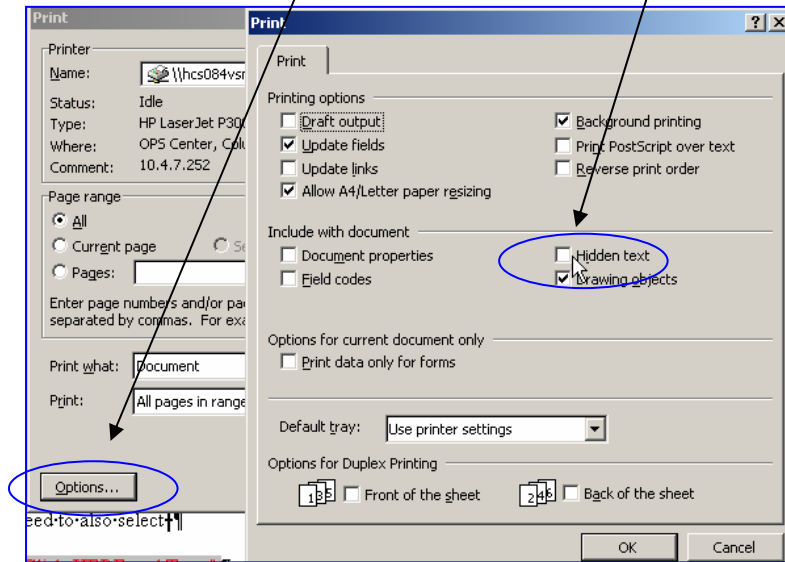


The **Check Spelling** button checks the spelling within the template in all form field and Click and Type areas. This button **only checks user input** not the preset boilerplate language.



The With Blue Text button **prints** the template **with the blue text**. The blue text is designed to be displayed on the screen, but not printed to expand the length of the finished document. If for some reason you wish to print a copy that includes the blue text, this button will do that for you.

Note: If you need to customize the printing, i.e., multiple copies or selecting a printer, you will need to select **File + Print + Option** + place a check in **Hidden Text** + OK using the Standard Word Toolbar.



"Click HERE and Type"

Click HERE and Type fields are **unprotected areas** in the template that enable you to **enter any text** you wish **using all of the formatting** available in Word. You may copy charts, graphs and spreadsheets from Excel, text and tables from other Word documents, or enter original text using bullets, numbered lists, underlines, italics, bolds, etc. This is an **unlimited area** so that it may be expanded to whatever size you need.

Unprotected Tables

Requirement Number	Requirement	Source	Objective	Design Specification

A number of the templates contain tables which are unprotected and allow input by simply clicking in the first row and column. You may see just blank rows in a table, or there may be instructions such as "[Click Here and Tab](#)" or "[Tab to add rows](#)".

You may either tab or click through the displayed table. Rows may be added indefinitely by tabbing from the last row, last column.

The **heading row** of most tables is also unprotected, so you should be careful about changing text unintentionally in that area. This is unprotected so that, should the table expand across pages, the heading will carry over to the top of each page.