

## 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 best to always work with the template (.dot)** by opening it from your hard drive either by using:

**Windows Explorer + right click over the template name + Open,**  
or in  
**Word, File + Open + select the template** from it's location on your hard drive.

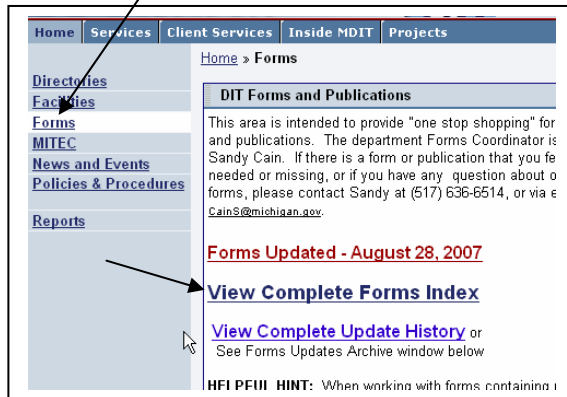
You may also use the method described below for storing/working with the PMM/SEM templates:

## DOWNLOADING AND STORING TEMPLATES

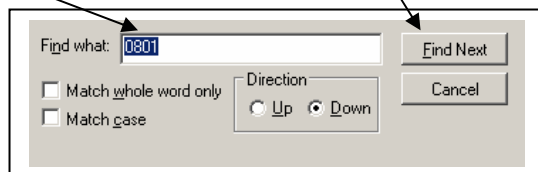
### Store Templates (.dot) on your hard drive

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.

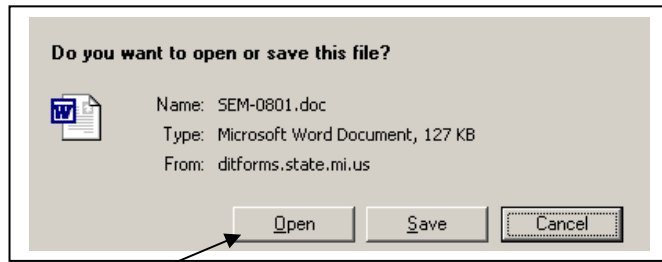
- ✓ Open Techtalk <http://connect.michigan.gov/portal/site/mdit>
- ✓ Click **Forms + View Complete Forms Index**



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

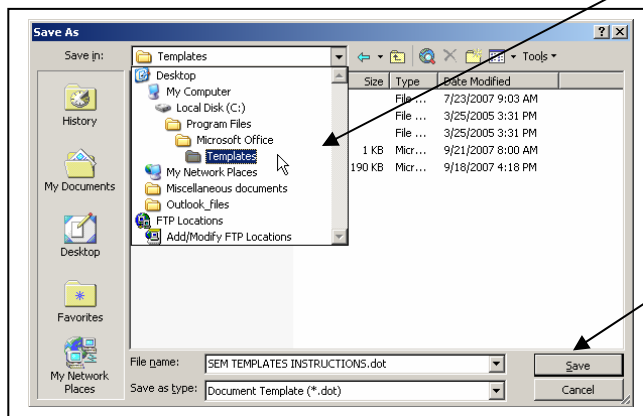


- ✓ Once you have found the desired form number, **click over the title** and the following will appear:



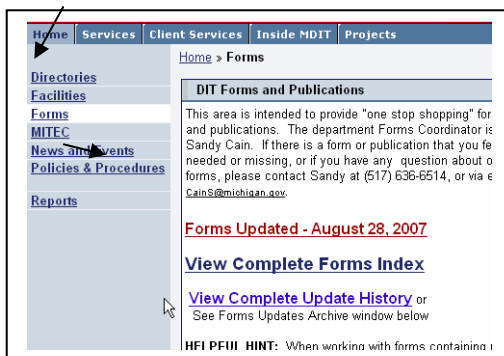
Click **Open**

After the form appears on your screen, click **File + SaveAs** + locate a **desired folder for working with the template** + click **Save**



**NOTE:** Since the templates are not being stored in the same location for everyone providing input to the template, it is important to remember to always work with the template. **NEVER** double click over the file name or select File + New in Word to bring the template to the screen. Rather, **ALWAYS** use File + Open in Word or right click + Open in Windows Explorer.

It is your responsibility to **check the TechTalk Forms website prior to starting a NEW project** to see if the blank templates you may 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.

## OPENING DOCUMENTS FROM WORD

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

- ✓ Open Word
- ✓ Click **File + Open + locate the desired template (.dot) + 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 (.dot)) + 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

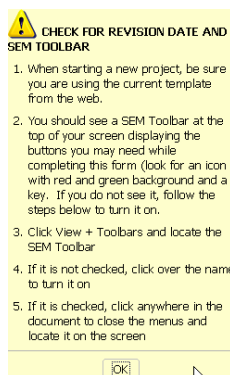
- ✓ Open Word
- ✓ Click **File + Open + locate the desired template (.dot) + (double click the desired template)**

When you need to edit a saved document

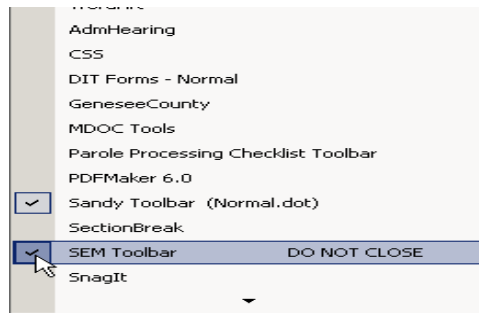
- ✓ Open Word
- ✓ Click **File + OPEN + locate the desired document (.dot) + Open**

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 SEM Toolbar should open when you open a SEM template. It may appear in your toolbar space above the page on your screen, or in any of several other places on the screen. 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 5 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). Once located, the toolbar can be moved to any location you find convenient by clicking over the toolbar name or the bar along the far left side of the toolbar and dragging the toolbar to another location.

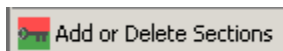


## SEM Toolbar

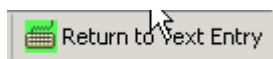
There are a maximum of nine (9) buttons on the toolbar which activate macros to automate functions within the SEM templates.



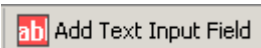
## Macro Buttons



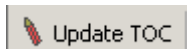
The purpose of the **Add or Delete Sections** button is to **unprotect the template** so that you are able to add/alter/delete information from any area in the template. This button should be used sparingly as it makes it possible to change boilerplate text you may not want changed. Make sure that you 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.



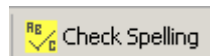
The **Update TOC** button automatically updates the TOC with any new information that has been added or deleted during an edit cycle. Pushing this one button saves multiple steps.



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 **Add DRAFT WM** and **Remove DRAFT WM** buttons are used to insert or remove a DRAFT watermark in the document while it is in draft stages.

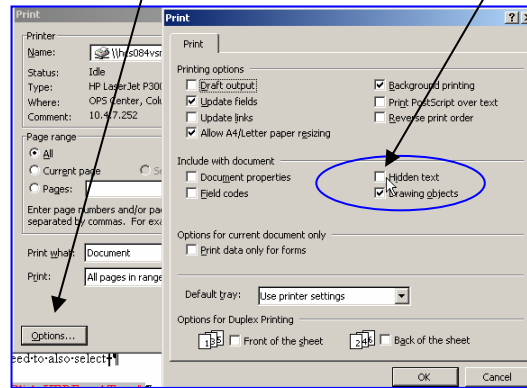


The **Check Spelling** button checks the spelling within the template in all form field and Click and Type areas. This button **only checks user input** not the preset boilerplate language.



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.



## Form Fields

Boxes appearing in grey are usually form fields in which you can enter information. Use the mouse or tab to move to the next field for typing. Shift + Tab will take you back a field. These fields cannot be formatted as the "Click HERE and Type" fields can be.

## Free Format Fields "Click HERE and Type"

These 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.

NOTE: When you tab to a "Click HERE and Type" area, the cursor will be positioned in from of it. Click over the HERE to highlight and remove it from the document. To move from an unprotected area, you must **CLICK** anywhere below the unprotected box. **TAB** when you are finished typing **ONLY** when you desire to add an additional row to a table.

## Unprotected Tables

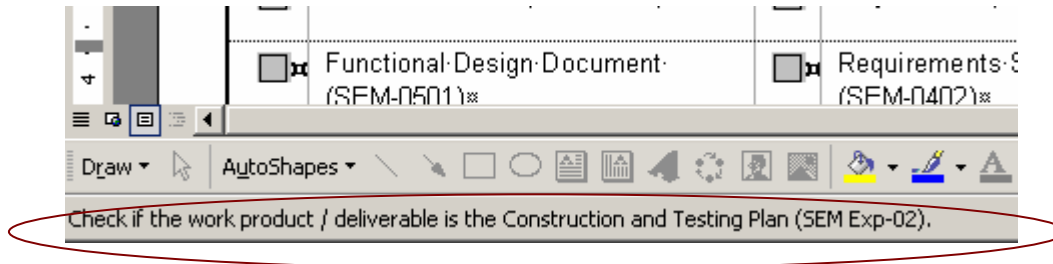
| Requirement Number | Requirement | Source | Objective | Design Specification |
|--------------------|-------------|--------|-----------|----------------------|
|                    |             |        |           |                      |
|                    |             |        |           |                      |

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.

## Help Messages



In the lower left corner of the field you will see **Help** messages to assist you with what should be placed in the active form field. These messages are not available in "Click and Type" or "Click and Tab" fields but will appear for all other fields. If you are unsure what is to be entered, check the lower left corner first.