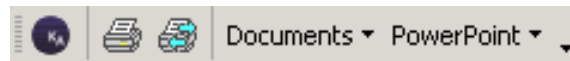


Microsoft Word Document Templates & Wizards

A guide to how they work

Operating document templates in Word is very simple and offers you a whole host of fully customisable options. Once the templates are installed on your computer or on a central server, start **Word**.

The **custom-built toolbar** will be automatically loaded:

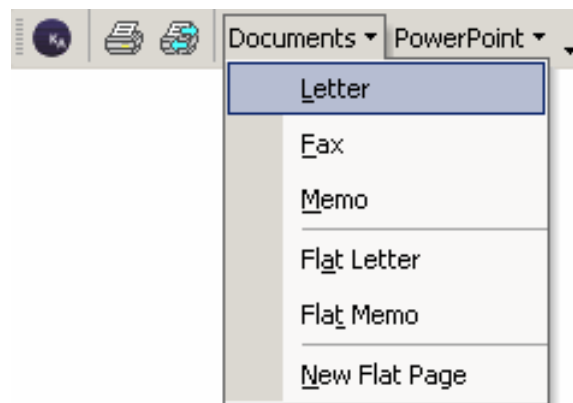


From here you can run all of your templates and various additional options. The details below are only examples.

The two **printer icons** in the toolbar control which printer trays pages are sent to, with the first page of a letter, for instance, going to a tray with pre-printed office stationery, while the rest of the document is sent to a plain paper tray. Users can still use the default print option in Word to send their documents for printing, but using the custom printer button will ensure that letters are always printed according to office guidelines.

The **PowerPoint** drop-down list offers options to start up any one of a selection of PowerPoint templates from within Word. A similar toolbar could be available in PowerPoint to run your Word templates.

Clicking on the **Documents** drop-down list displays all of the available Word document templates:



When a template is selected, users will be presented with a copy of that template (the original template document is never overwritten). Click-and-type fields show where data such as the recipient address should be entered. Click on these with the mouse and overtype them with your data.

Additional options can be added to basic templates to automate user requirements such as inserting pre-formatted landscape pages, inserting pre-coloured text boxes, or performing operations that are much faster and more secure and controllable when they are automated.

The **Flat Letter** and **Memo** shown in this list are semi-automated templates for touch-typists who produce large numbers of documents and require less automation. Lesser mortals can use the fully automated document templates at the top of the list.

Click on **Letter** to create a letter:

Letter Wizard

KA

Predefined
Please select delivery address from the list below, or enter details right and click Save

North, Mr & Mrs R

Delete Save

Recipient's Address

Name Mr & Mrs R North

Co.

1. 16 Thorntree Court

2. Crofton

3. West Yorkshire

4.

Post Code WF4 1SP

Salutation Mr & Mrs North

Letter step 2 of 3

Cancel < Back Next > Finish

Users of automated “**wizard-level**” templates will be presented with a dialogue box.

In the samples shown here, step 1 allows users to select between a series of different company divisions, each with different identity branding and addresses.

Step 2 (above) allows users to select a recipient address from a saved list or enter a new address (and save it to the list for future use).

Now click **Next**:

Letter Wizard

KA

Information & Optional Details

Date: 8 December 2006

Subject: Enter Title Here

Direct Telephone Number Direct Fax Number

Reply Details

Please reply to:
Your Reply name
Your Office

Include Reply Details? Change

Sign Off

Yours sincerely

Yours faithfully

Kind regards

Include E-mail Address Signatory

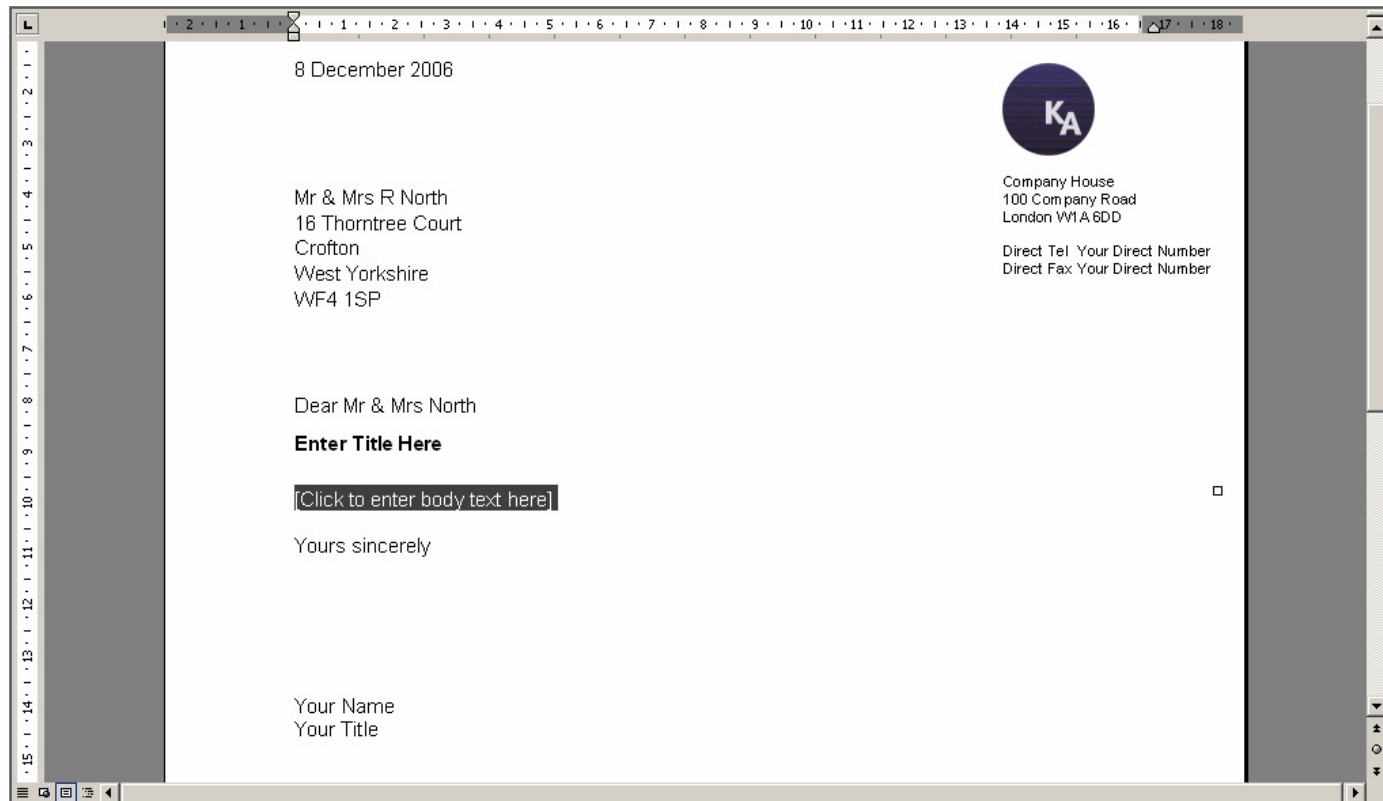
Letter step 3 of 3

Cancel < Back Next > Finish

Now users can amend the pre-entered date, enter a subject title, and manage any other required details (the requirements are fully customisable at the time the templates are constructed).

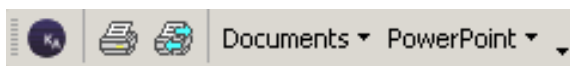
If you require a **reply address** to be entered onto the letter, this option can also be controlled from here, as can your **sign-off** details. Option buttons lead to additional dialogues which control these options.

Click **Finish** to complete your document, and all the information is automatically entered onto the document body:

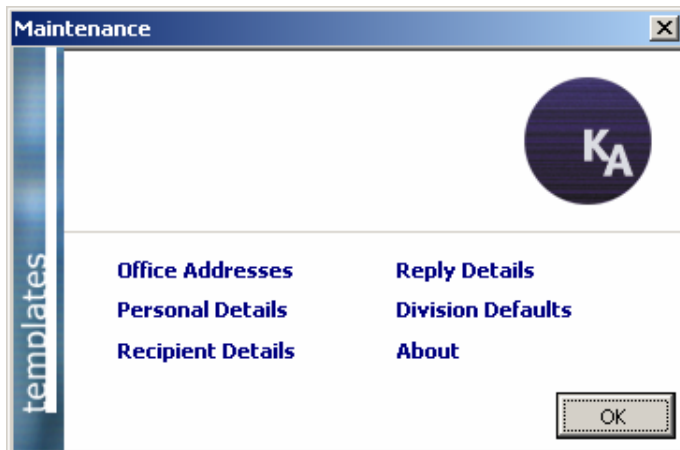


Everything is there, and the cursor is positioned over the body text field, ready for the user to start typing.

Returning to the **toolbar**:



Clicking on the company logo opens the **Maintenance** dialogue:



The contents of this dialogue are completely customisable at construction time according to the needs of the user. Select **Office Addresses**:

The 'Office Addresses' dialog box is divided into two main sections. On the left, the 'Company List' section has a radio button for 'Saved List' and a list box containing 'Company Address 1', 'Company Address 2', 'Company Address 3', and 'Company Address 4'. Below the list is a preview of the selected address: 'Company Name', 'Company House', 'Company Road', and 'London W1A 6DD'. There are 'Delete Details' and 'Save Details' buttons. At the bottom left is a 'Set as Division Default' button. On the right, the 'Office Address' section has several text input fields: 'Company Name' (containing 'Company Address 1'), 'Address' (containing 'Company House'), 'Company Road' (containing 'Company Road'), and 'London W1A 6DD'. Below these are fields for 'Telephone No.', 'Fax No.', 'Nightline', and 'Other Details'. At the bottom right of this section is a checkbox for 'Place Details After' followed by 'Telephone No'. At the bottom of the dialog are 'Preview', 'OK', and 'Cancel' buttons.

In this dialogue, the list of company office addresses can be edited and previewed. If there are company divisions then the default addresses for these can also be set here. Other options can be added. The address entered on the right is the one that will be used in new documents. This can be overwritten manually or replaced by clicking on a saved address in the list on the left.

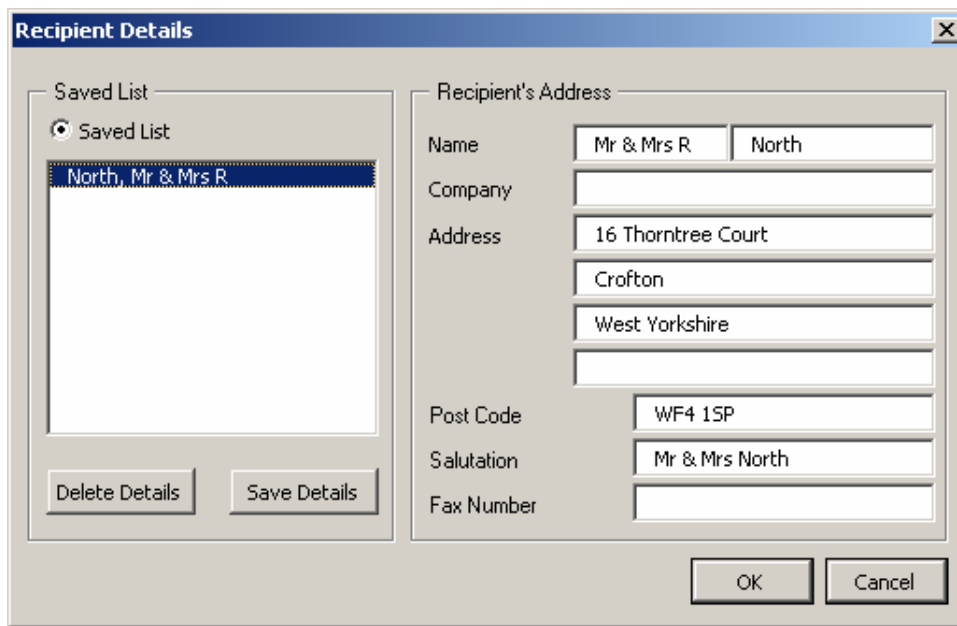
Click **OK** to exit. Select **Personal Details** from the **Maintenance** dialogue.

The 'Personal Signatory' dialog box is divided into two main sections. On the left, the 'Predefined' section has a text area containing 'Empire Way', 'Ixworth Place', and 'Your Name'. Below it are 'Delete Details' and 'Save Details' buttons. On the right, the 'Personal Details' section has several text input fields: 'Name' (containing 'Your Name'), 'Job Title' (containing 'Your Title'), 'Direct Telephone No.' (containing 'Your Direct Number'), 'Direct Fax No.' (containing 'Your Direct Number'), and 'Office Mobile No.'. Below these is a checkbox for 'Include with Office Address'. At the bottom right of this section are 'Office Location' (containing 'Your Region') and 'Full Email Address' fields. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

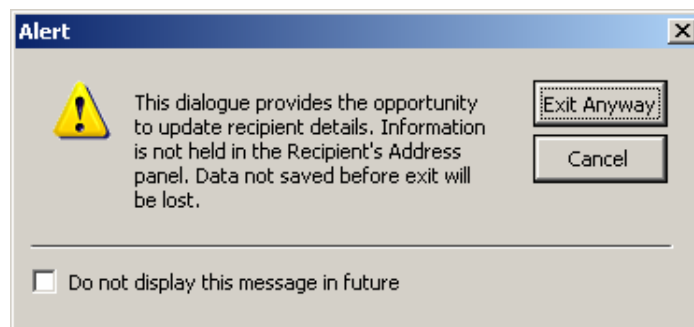
The details that are used as a sign-off in letters and faxes can be edited here in the same way as for **Office Addresses**.

Again, click **OK** to exit this dialogue.

From the **Maintenance** dialogue, the option is available for editing the saved list of recipient addresses.



The details that are shown here are the complete details for all recipients. When the **Fax** wizard is run, only the name, company, and fax number text boxes are visible, no others. The fax number text box is not required in the **Letter** wizard so it will not be present there.



Finally, warnings and guides can be created to monitor events and settings, to ensure that users follow best practise guidelines and know how to use the more complex sections of the templates.

Many more options can be provided, such as using a **scanned signature** in faxes. A dialogue box enables users to browse their system for the image file and load it so that it becomes available for faxes (and any other documents in which it might be required).

If users are saving data such as office addresses and recipient addresses, then the files in which this data is saved should be backed up. A dialogue to facilitate this in an easy operation that takes seconds to run could also be added to the templates.

The saved **office addresses** file could be replaced (or complimented) by having another list of addresses in an **Excel spreadsheet**. This can be loaded through the office address dialogue and the details can displayed in the 'saved details' window on the left of the dialogue box.

The sky is the limit when it comes to customising wizard templates for your needs.