Office Doc

MS-OFFICE 2016 - WORD

English version

Templates and other customized files
Forms - Introduction to macros
Protection

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CUSTOMIZING

1 Types of templates

A template can be

- A *standard* .docx document
- A *Microsoft preset template* (when installing Office or if you download one from their website – free)
- A *custom* .dotx or .dotm template
- A *corporate* template (created by your *company*)

1.1 Using a standard « .docx » document as a « template »

A standard document can work as a *template*. You will retrieve any text, the default font and size, the document styles etc …This is particularly appropriate for *personal templates or templates shared by a team (preferably a small team)*

Create

Save the document as usual. Give it a name that will clearly indicate that it will work as a template.

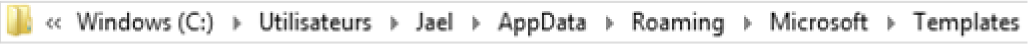
Use (from the Explorer)

Right click the presentation and option NEW
Word creates an unsaved copy of the presentation

Advantages	You are working with standard documents The destination folder is free
Disadvantages	A simple OPEN can edit the source document. Dangerous. You can add a *password to modify*. This will secure the source document but every time a new document is created using this template, you will be prompted to give the password. In the end, this becomes highly annoying. You can also simply add a *Read-Only* attribute (Windows Explorer – Right-click the doc and option PROPERTIES). But caution, anyone can uncheck the option. At least it secures the double-click to open. If the source document contains macros (.docm extension), these will not be retrieved in the newly created document (contrary to what happens in Excel in the same situation)

1.2 The suggested templates when you run Word (.potx)

The suggested or recently used Microsoft templates are displayed when Word is run or when you select a FILE – NEW. But no *visible* access to custom or corporate templates. The Microsoft templates are stored at the following address :


« Windows (C:) ▸ Utilisateurs ▸ Jael ▸ AppData ▸ Roaming ▸ Microsoft ▸ Templates

This path can be checked – and changed if necessary in **Word** : FILE - OPTIONS – ADVANCED Category – Right at the end of it : GENERAL Zone - FILE LOCATIONS Button – USER TEMPLATES Row.

Note : this path was the default storage address for custom templates in previous versions.

1.3 The .dotx - .dotm files

1.3.1 Difference between the two extensions

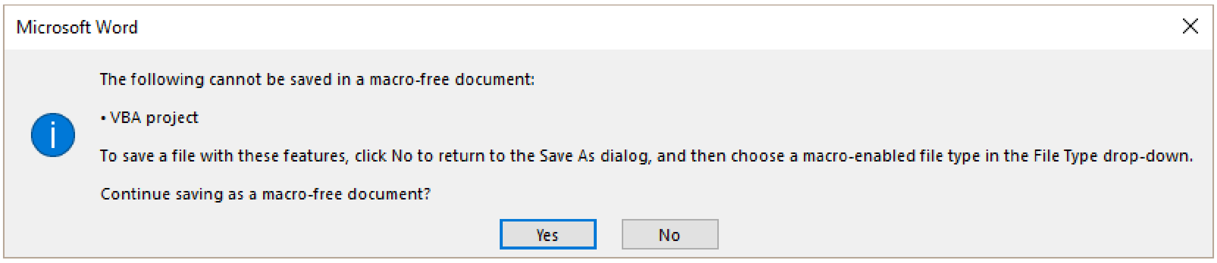
Files of these types are appropriate to *corporate templates,* namely those used by a large department or the whole company.

The templates files can be of two types :

.dotx	Word template with no macro
.dotm	Word template with macros(ActiveX controls not affected)

Caution : the presence of a macro FORCES you to save the file with the correct extension. It is not a question of personal choice.

If you try to force saving the file with the .dotx extension instead of.dotm, the following dialog box will warn about the consequences :



The following cannot be saved in a macro-free document:

• VBA project

To save a file with these features, click No to return to the Save As dialog, and then choose a macro-enabled file type in the File Type drop-down.

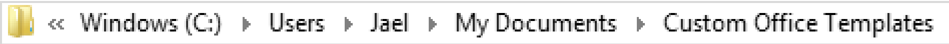
Continue saving as a macro-free document?

NO : back to the document – now save again using the correct extension
YES : the document remains a normal template with no macro. Until you close the file, the macros are still visible. When you open the file again, you will see that all macros have been removed.

✎ The same warning box will be displayed if you try to save a standard document containing macros by using the .docx extension instead of the .xlsm one.

1.3.2 Creating the template

- Prepare the content : texts, formats, header & fotter, styles, form fields …)
- Save your file – the folder you will first select is totally indifferent (Documents will do fine for instance). *But most important : specify the template extension* (.dotx .dotm). Then the following folder will be automatically selected ***and created*** *:*



« Windows (C:) › Users › Jael › My Documents › Custom Office Templates

You can create as many subfolders as required to “sort out” your templates.

✏ True to say : once the folder has been created, you can even save standard files into this folder (.docx .docm) and it will work the same

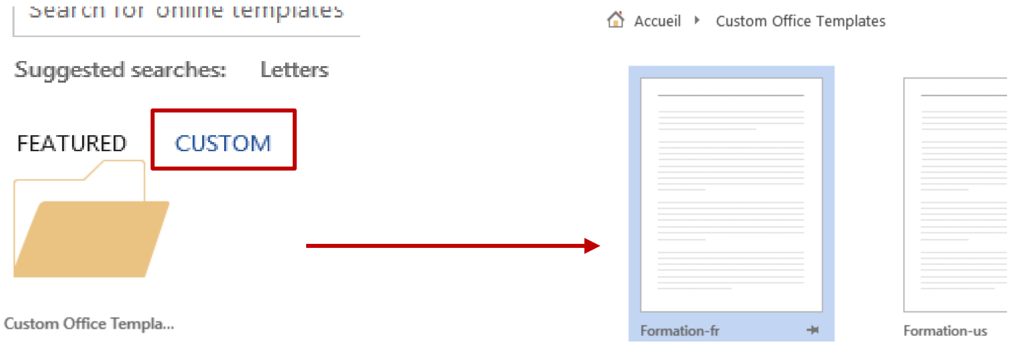
✏ While saving, click the SAVE THUMBNAILS … option to display the template content when you create a new document based on this template. But we have tested this and at the moment it doesn’t work … to follow.

1.3.3 *Creating a new workbook based on a template*

Windows Explorer

Word

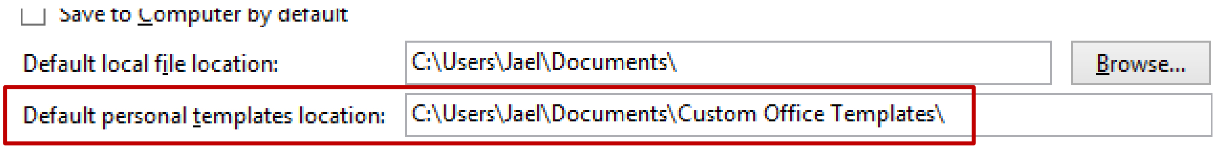
- Word displays the folder when run or with a File – New :


Search for online templates
Suggested searches: Letters
FEATURED
CUSTOM
Custom Office Templa...
Accueil
Custom Office Templates
Formation-fr
Formation-us

Select the required template
A new unsaved document is created with the content and the settings or the template.

1.1 I want to set my own folder

- FILE - OPTIONS – SAVE Category



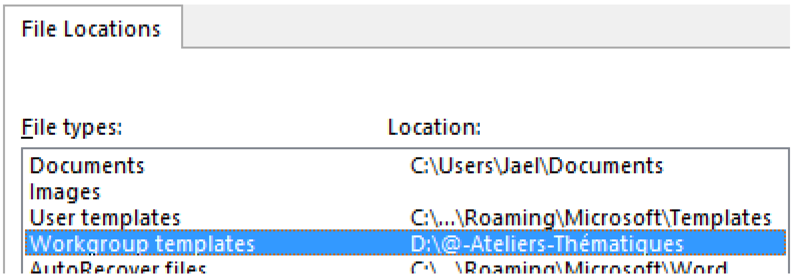
☐ Save to Computer by default
Default local file location: C:\Users\Jael\Documents\
Default personal templates location: C:\Users\Jael\Documents\Custom Office Templates\

Change the path.

A new path will only affect the current program. But if the Custom Office Templates folder has been created at least for one Office program, it will still be displayed and its content will be available.

1.2 Corporate templates

As for previous Office versions : FILE – OPTIONS – ADVANCED Category – At the bottom of the list : GENERAL section – FILE LOCATIONS Button - WORKGROUP TEMPLATES Row



File Locations

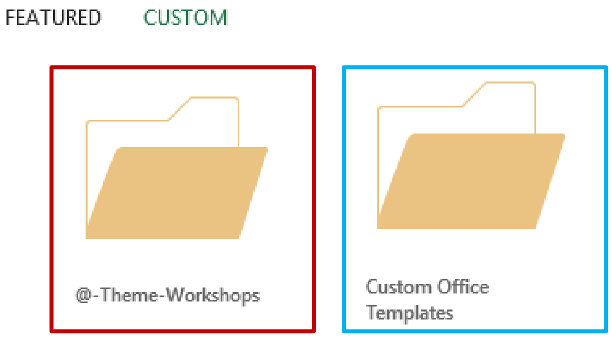
File types:	Location:
Documents	C:\Users\Jael\Documents
Images	
User templates	C:\...\Roaming\Microsoft\Templates
Workgroup templates	D:\@-Ateliers-Thématiques
AutoRecover files	C:\...\Roaming\Microsoft\Word

It is the path for templates shared by a dept or the whole company. Usually it refers to a network folder *protected and accessible to only assigned users that are allowed to create, open and edit templates)*

But although the folder is protected, any user can create a new workbook based on one of those templates. (protection is only to manage them)

The chosen folder will be displayed next to the Custom Office Templates folder (or any other one you have set) when you click on CUSTOM.

In red : the corporate folder
In blue : the default template folder

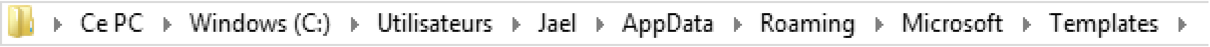


Reminder : the folder set for USER TEMPLATES was the .dotx / .dotm folder before this 2013 release. Now it is the path for the preset Microsoft templates (when you run Word)

2 The Word global template : Normal.dotm

It is the template that contains default settings such as the font type, size, color … the margins and the styles. It can also include macros.
The Normal.dotm template is unique and specific to each user. It is not shared.

Path



Ce PC ▸ Windows (C:) ▸ Utilisateurs ▸ Jael ▸ AppData ▸ Roaming ▸ Microsoft ▸ Templates ▸

- It is created when you change one of its default settings.
  If you delete it, Word creates a new Normal.dotm file, automatically reset to default settings.

- The Normal.dotm template is saved when you exit Word. Therefore make sure to exit and run Word again when you make important modifications.

  This final saving is automatic and done behind the scenes. If you wish Word to prompt you to save the file before you quit Word : FILE - OPTIONS – ADVANCED Category –SAVE Topic – PROMPT BEFORE SAVING NORMAL TEMPLATE Option.

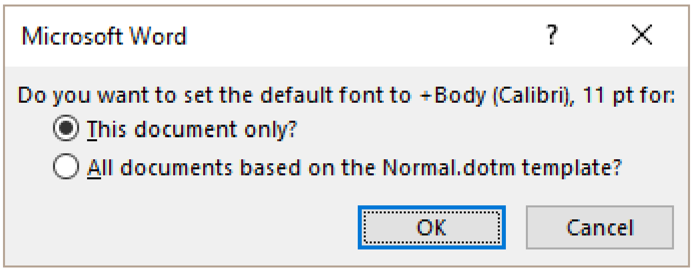
3 Normal.dotm : what can be customized ?

3.1 Font, paragraph, margins and other page setup options

All these settings can be made *default options* :

- HOME Tab – FONT Group – Dialog box launcher *Or*
  HOME Tab – PARAGRAPH Group – Dialog box launcher *Or*
  PAGE LAYOUT Tab – PAGE SETUP Group - Dialog box launcher

- DEFAULT Button
  A message warns you that you are going to modify the NORMAL template (Normal.dotm)



Microsoft Word

Do you want to set the default font to +Body (Calibri), 11 pt for:

● This document only?

○ All documents based on the Normal.dotm template?

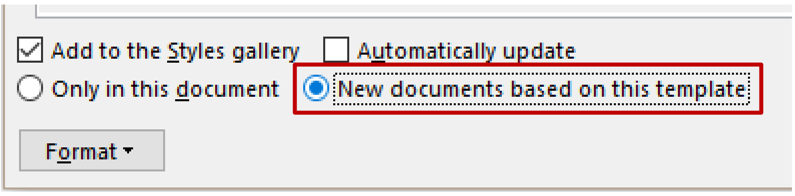
- Click on ALL DOCUMENTS BASED ON THE NORMAL.DOTM TEMPLATE

- Reminder : the NORMAL.DOTM is saved when you exit Word. *See page* 11

3.2 Styles

3.2.1 « Standards » styles (paragraph – characters) – preset or custom

- Make sure that you start from a STANDARD document (and not one created on a specific template)
- HOME Tab – STYLE Group – Dialog box launcher – Styles Pane
- Point the required style, click on the triangle located at its right and click on MODIFY :



☑ Add to the Styles gallery ☐ Automatically update

○ Only in this document ● New documents based on this template

✎ As you started from a standard document, the word *template* corresponds to Normal.dotm. If a specific template has been used, then it will affect this template. It never affects already created documents, only *new* ones.

- No special message

✎ Cascading effects
If you modify for instance the font for the *normal* style, this will affect all character and paragraph styles, except the *Heading 1, Heading 2, 3 … styles.* What you modify in *Heading 1* has no effect on *Heading 2, 3 …*

3.2.2 List styles

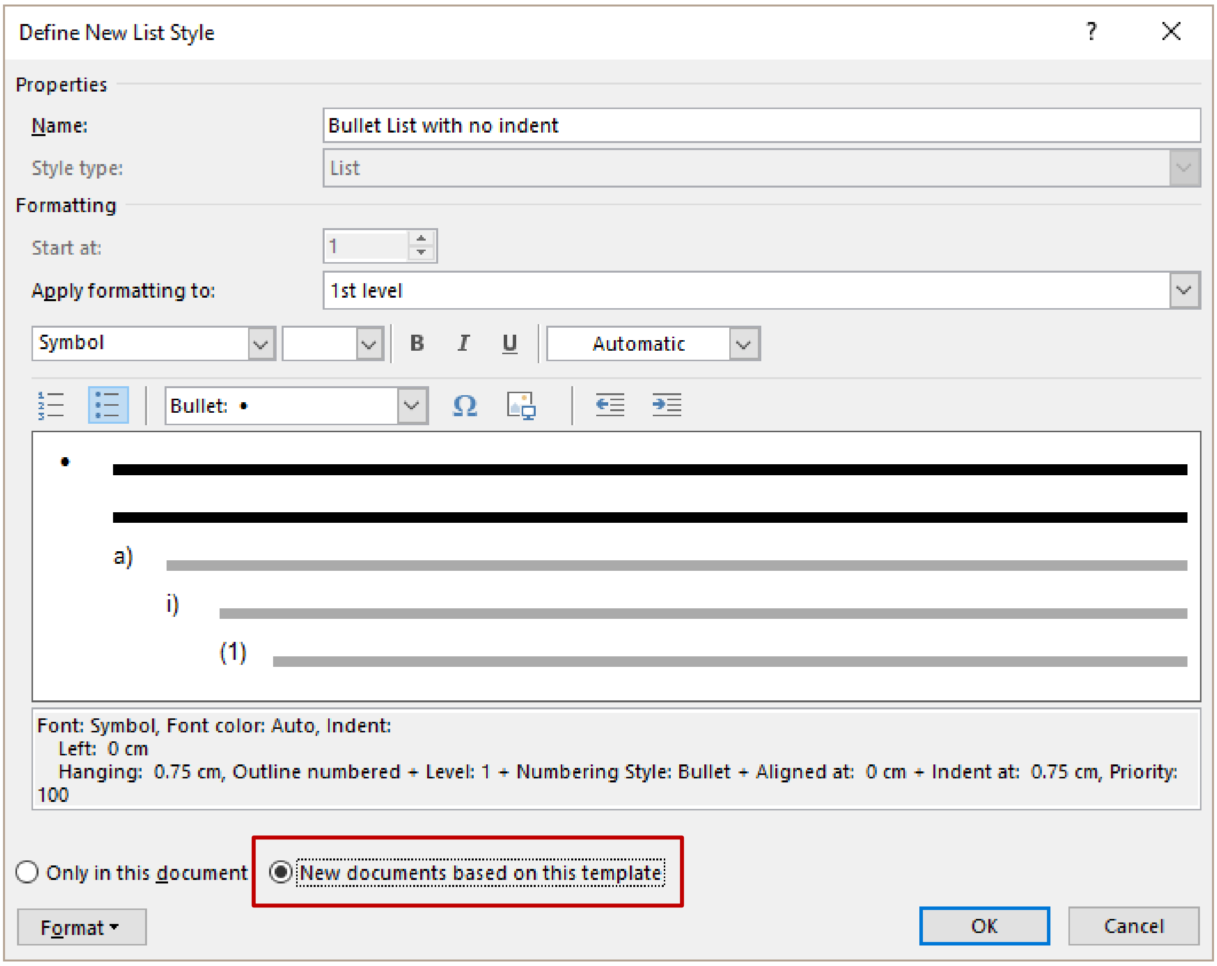
Bulleted/numbered/multi-level lists have the following characteristics :

1. *The bullets/numbering/multilevel list gallery can memorize new types* (reminder : automatically for bullets and numbers, by right clicking on a bullet/number contained into an active document and by right clicking a multilevel list) *but this is done in Word and not in Normal.dotm.*

2. *If the bullet or the number or the multilevel type suits your needs but you wish to modify only the alignment (switching from 0.63 cm or 0.76 cm à 0.75 cm for example), for Word this is not a modification and you cannot save this new type into the gallery. What users often do is a minor change applied to level 9 such as a dot at the end !*

But another solution can be to create a *list style.*

- Make sure to start from a STANDARD document (and not one created on a specific template)
- HOME Tab – PARAGRAPH Group – MULTILEVEL LIST Button – DEFINE NEW LIST STYLE Option



Name: Bullet List with no indent

Style type: List

Start at: 1

Apply formatting to: 1st level

Symbol

Automatic

Bullet: •

Font: Symbol, Font color: Auto, Indent:
Left: 0 cm
Hanging: 0.75 cm, Outline numbered + Level: 1 + Numbering Style: Bullet + Aligned at: 0 cm + Indent at: 0.75 cm, Priority: 100

○ Only in this document ● New documents based on this template

- Type a name for the list
- Choose the bullet or the number for the first level
- FORMAT Button – NUMBERING to set the indents
- Define the next levels if required
- Check the NEW DOCUMENTS BASED ON THIS TEMPLATE option

This template will correspond to Normal.dotm only if it is a standard document.
and this list will be available to any *new* document. If you select the ONLY IN THIS DOCUMENT option, the list style will belong to THIS document only.

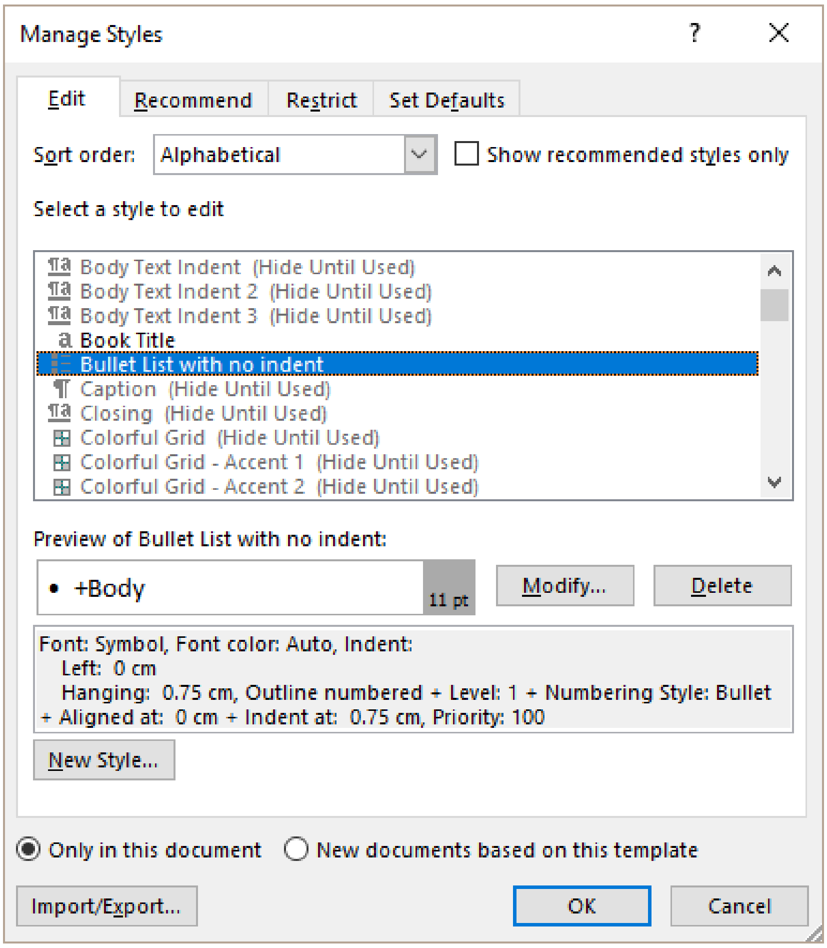
- The new list style will be displayed at the bottom of the gallery – zone *List Styles*

Note : provided you do not close the document, the list style becomes the default style when you click on the BULLETS / NUMBERING button. When the document is closed or when you open another document, everything is reset.

Delete – Modify - Export

The style is not listed in the usual list of styles
If you display the Styles Pane and require viewing *All styles* through the OPTIONS option, the custom list styles are not included.

Click on the MANAGE STYLES button (at the bottom of the pane)



Sort order: Alphabetical ☐ Show recommended styles only

Select a style to edit

- Body Text Indent (Hide Until Used)
- Body Text Indent 2 (Hide Until Used)
- Body Text Indent 3 (Hide Until Used)
- Book Title
- Bullet List with no indent
- Caption (Hide Until Used)
- Closing (Hide Until Used)
- Colorful Grid (Hide Until Used)
- Colorful Grid - Accent 1 (Hide Until Used)
- Colorful Grid - Accent 2 (Hide Until Used)

Preview of Bullet List with no indent:

• +Body 11 pt

Font: Symbol, Font color: Auto, Indent:
Left: 0 cm
Hanging: 0.75 cm, Outline numbered + Level: 1 + Numbering Style: Bullet + Aligned at: 0 cm + Indent at: 0.75 cm, Priority: 100

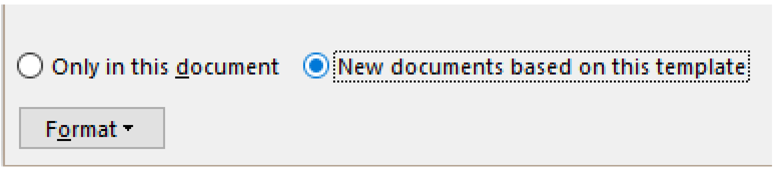
● Only in this document ○ New documents based on this template

This list of styles is exhaustive and you can select the required style to delete it or to save it from THIS document to NORMAL.DOTM etc … You can also modify it or export into another document (IMPORT/EXPORT button). Handy when the style already belongs to Normal.dotm but needs to be exported in a previously created document.

3.2.3 Table styles

Table styles do not appear in the Styles Pane, even though you choose to display *All styles*. Table styles are to be managed directly in the table functionality.

- Place the cursor inside a table
- DESIGN Tab – TABLE STYLES Group
- In the gallery : NEW TABLE STYLE Option
- Define the style settings
- At the bottom of the dialog box :



○ Only in this document ● New documents based on this template

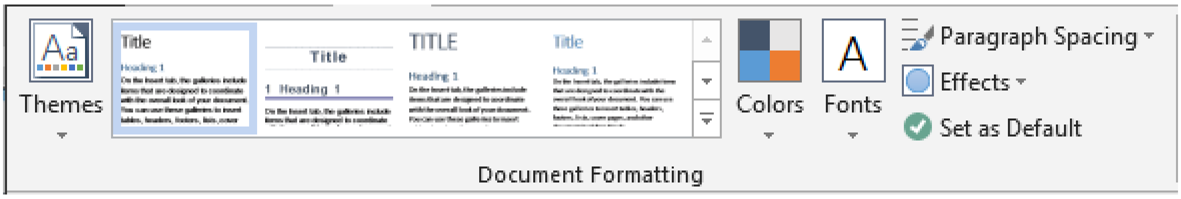
- NEW DOCUMENTS BASED ON THIS TEMPLATE Option

- This template will correspond to Normal.dotm only if it is a standard document and this list will be available to any *new* document. If you select the ONLY IN THIS DOCUMENT option, the list style will belong to THIS document only.

Delete – Modify - Export

As for list styles, the dialog box to manage styles (The MANAGE STYLES button at the bottom of the Styles Pane) will list all the table styles and you can modify, delete, export any one of them.

3.3 DESIGN Tab – DOCUMENT FORMATTING Group


Themes
Title
Heading 1
TITLE
Colors
Fonts
Paragraph Spacing
Effects
Set as Default
Document Formatting

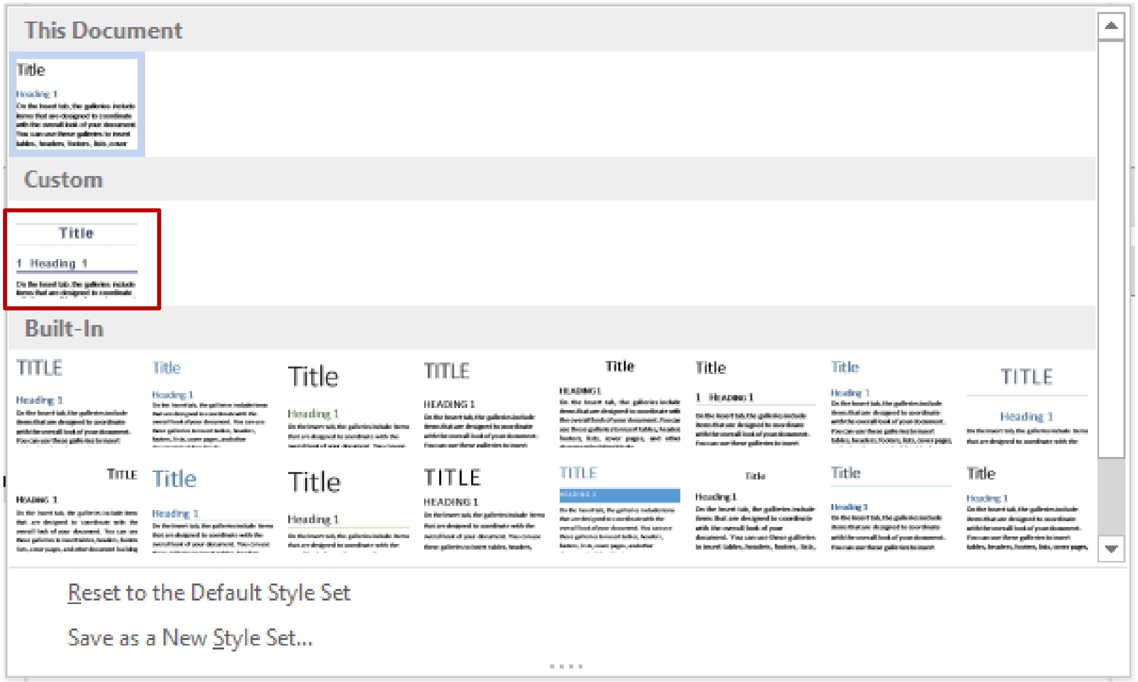
3.3.1 Themes

If you change themes the current colors and fonts will be automatically adapted to those of the new theme. Unless you have applied « off themes » colors. In this latter case they do not change.

The COLORS, FONTS and EFFECTS buttons related to the theme are located at the right of the styles gallery.

3.3.2 Gallery of styles

A gallery displays *style sets* : character and paragraph formatting for the Heading 1-2-3 styles – in the colors of the current theme.

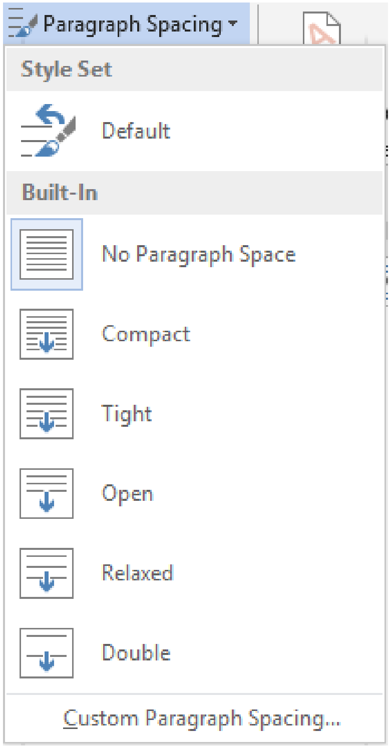

This Document
Custom
Built-In
Title
Heading 1
TITLE
Reset to the Default Style Set
Save as a New Style Set...

Interesting : SAVE AS A NEW STYLE SET : all Heading 1 - 2- 3 … syles and custom settings can be turned into a *style set* that you can use in *any new document.* It is what has been done with the style in the screen capture (circled in red).

Handy as this avoids importing styles 1 by 1 through the ORGANIZER dialog box.

Note : the style set is saved as a .dotx template in the QUICKSTYLES folder (a subfolder of AppData/Roaming … in your profile).

3.3.3 PARAGRAPH SPACING Button



Preset suggestions

To set a spacing – before and after – and also the line spacing for all the document paragraphs

Custom Paragraph Spacing

A dialog box provides additional settings such as alignment, indents … that will be applied to the entire document

These modifications change the NORMAL style. But any style defined with a custom setting has a priority.

3.3.4 SET AS DEFAULT Option

Use it to set the theme (colors, fonts and effects), the different styles used in the document and the default paragraph spacing as a standard for all *new* documents.

Although NORMAL.DOTM is not mentioned it is obvious that this commands affects this basic Word template !

3.4 Autotext entries

Autotext entries are linked to building blocks.

See chapter about this for more explanations. Page 22

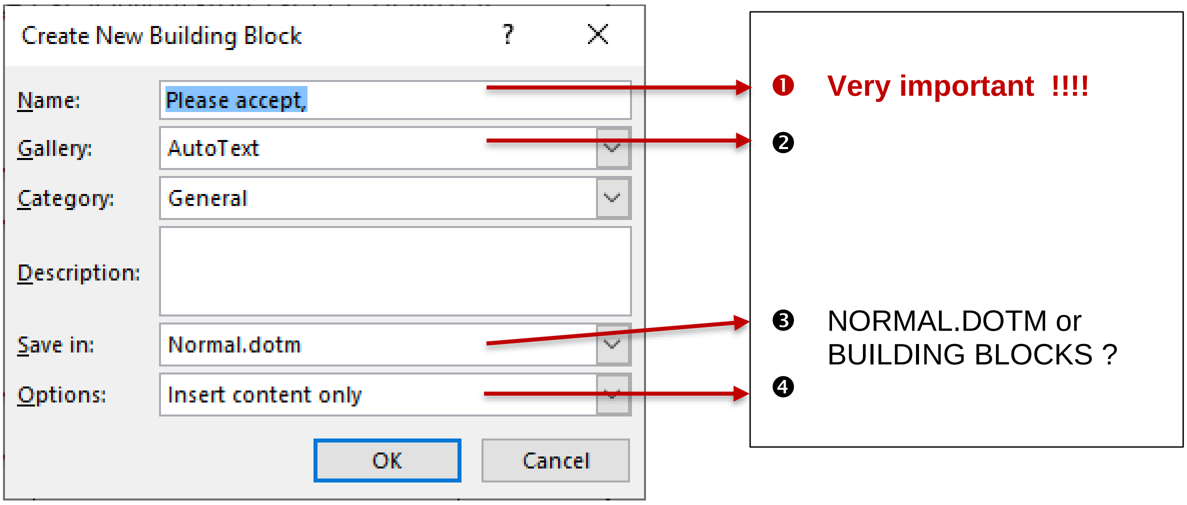
3.4.1 Creating and inserting the entry

- Select the text. Like the examples below

  Please accept, Dear Mrs X, my best regards

  ✎

(It can be simple text but also a table and even pictures)



Create New Building Block

Name: Please accept,

Gallery: AutoText

Category: General

Description:

Save in: Normal.dotm

Options: Insert content only

❶ **Very important !!!!**

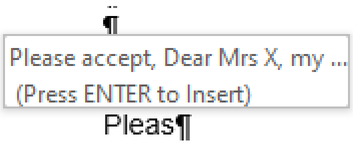
❷

❸ NORMAL.DOTM or BUILDING BLOCKS ?

❹

❶

You accept at least the first 4 characters of what Word has automatically suggested



Please accept, Dear Mrs X, my ...

(Press ENTER to Insert)

Pleas¶

Inserting the entry in the document

Type the beginning of the memorized text

When you type the 4th one, Word automatically displays a tooltip prompting to press ENTER to insert the rest

Caution : the name of the entry MUST be unique ! If not, Word won't suggest anything … consequently you cannot prepare a set of entries with a **common start** such as those below :

Please accept, Dear Mrs X, my best regards
Please accept, Dear Mr X, my best regards
Please accept, Dear Judge, my best regards
Etc …

You choose a custom code as the name of the entry

You can create a code of 3 or more characters but that does not necessarily correspond to the memorized text. For instance, *pen* for the above pencil symbol.

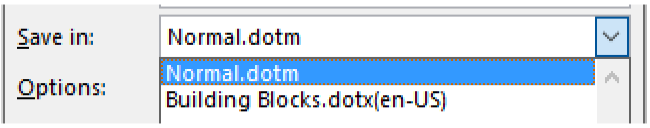
- **Insert the entry** : type the code and press F3 : Word removes the code and replaces it with the memorized content.

This is certainly what you would have to do if you need to set entries that start with the same characters.

Another way to insert the entry : you can display the autotext gallery (INSERT Tab – TEXT Group – QUICKPARTS Button). Click and the autotext content will be inserted at the position of the cursor.

❷
Microsoft has created a gallery dedicated to autotext entries. It has its own category (AUTOTEXT) in the building blocks. Saving is by default in NORMAL.DOTM

❸
Normal.dotm can contain lots of autotext entries, especially if the content is mainly simple text. But if you know right from the start that you are going to create tens of them – or even more – a lot of them containing heavy items such as pictures – then NORMAL.DOTM could well become “over weighted” and slow down Word. In that case, it would be preferable to choose the other template for your entries.


Save in: Normal.dotm

Options:

Normal.dotm
Building Blocks.dotx(en-US)

❹
Set how to insert the content : content only, in its own paragraph or page ?

3.4.2 Managing the entries

- Go back via INSERT Tab – TEXT Group – QUICKPARTS Button – AUTOTEXT Option
- Right click the entry to modify (in the gallery)
- Option ORGANIZE AND DELETE
- You land in the dialog box where all the entries (not only the autotext ones) are listed. The advantage is that the autotext entry is displayed and pre-selected !

General managing :
INSERT Tab – TEXT Group – QUICKPARTS Button – BUILDING BLOCKS ORGANIZER Option – EDIT PROPERTIES Button but also DELETE Button

3.4.3 There was a long time ago an autotext entry in the footer options that would insert the file name and its parth

You need to insert the corresponding field through the FIELD command. Then find in the dialog box the FILENAME field code. Set the required case for the entry and check the ADD FILE PATH TO NAME option if necessary.

3.5 Macros

When you save a macro you can choose NORMAL.DOTM as destination, so that the macro will be available in any new document. *See chapter on this topic - page 45*

4 Word and Outlook : the NormalEmail.dotm template

When you work with Outlook, Word is the message default text editor but Word does not use *Normal.dotm* to manage the text. It uses another file named *NormalEmail.dotm*, a lighter version : not access to the contents of Building Blocks.dotx for instance.

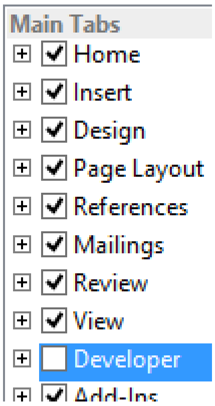
The path of *NormalEmail.dotm* is the *user templates* folder (by default at the root of the Templates folder).

5 Managing the templates

5.1 Viewing the DEVELOPER Tab

This tab is not displayed by default. It contains the buttons of functionalities that Microsoft considers as « advanced » such as creating and managing macros, creating and managing forms, protection and managing templates :

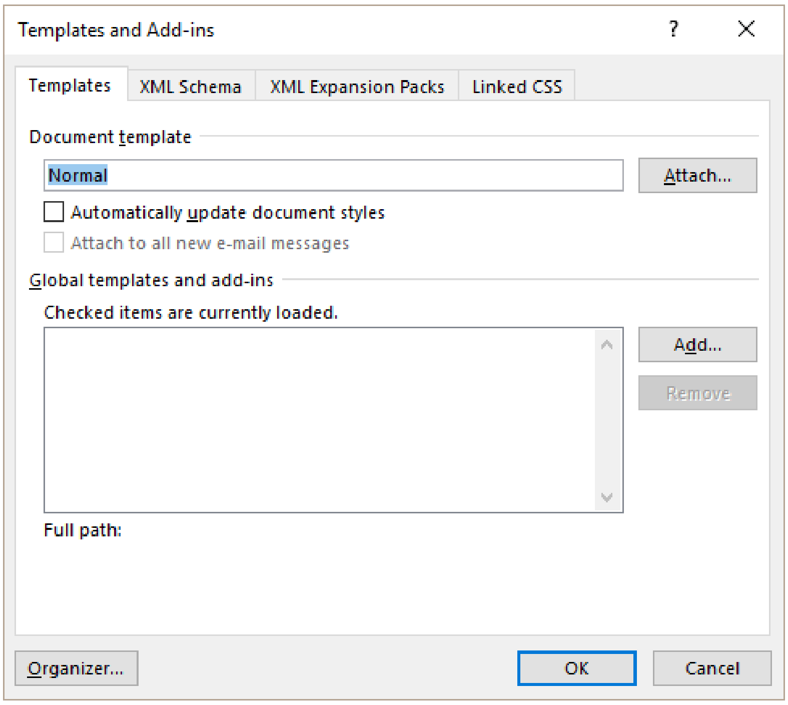
- FILE – OPTIONS – CUSTOMIZE RIBBON Category
- Tick on DEVELOPER



Main Tabs
☑ Home
☑ Insert
☑ Design
☑ Page Layout
☑ References
☑ Mailings
☑ Review
☑ View
☐ Developer
☑ Add-Ins

5.2 Managing templates

- DEVELOPER Tab – TEMPLATES Group – DOCUMENT TEMPLATE Button


Templates and Add-ins
?
×
Templates
XML Schema
XML Expansion Packs
Linked CSS
Attach...
Global templates and add-ins
Add...
Remove
Full path:
Organizer...
OK
Cancel

Document template: Normal

☐ Automatically update document styles

☐ Attach to all new e-mail messages

Checked items are currently loaded.

5.2.1 *Attaching one or more specific templates to the current document*

Document template and the AUTOMATICALLY UPDATE DOCUMENT STYLES option

You may select a specific template and attach it to the active document. You will retrieve its macros.

You can also **retrieve the template styles provided that the AUTOMATICALLY UPDATE DOCUMENT STYLES option.**

When you validate, the template styles are available in the destination document. But caution, turning the option on also implies that when you open the destination document, i twill automatically be updated if a modification has been done to a style in the source template. If you do not wish this to occur, make sure to return into this dialog box and TURN OFF the option. This will not remove the styles but will prevent from unwanted updating.

Global templates and add-ins

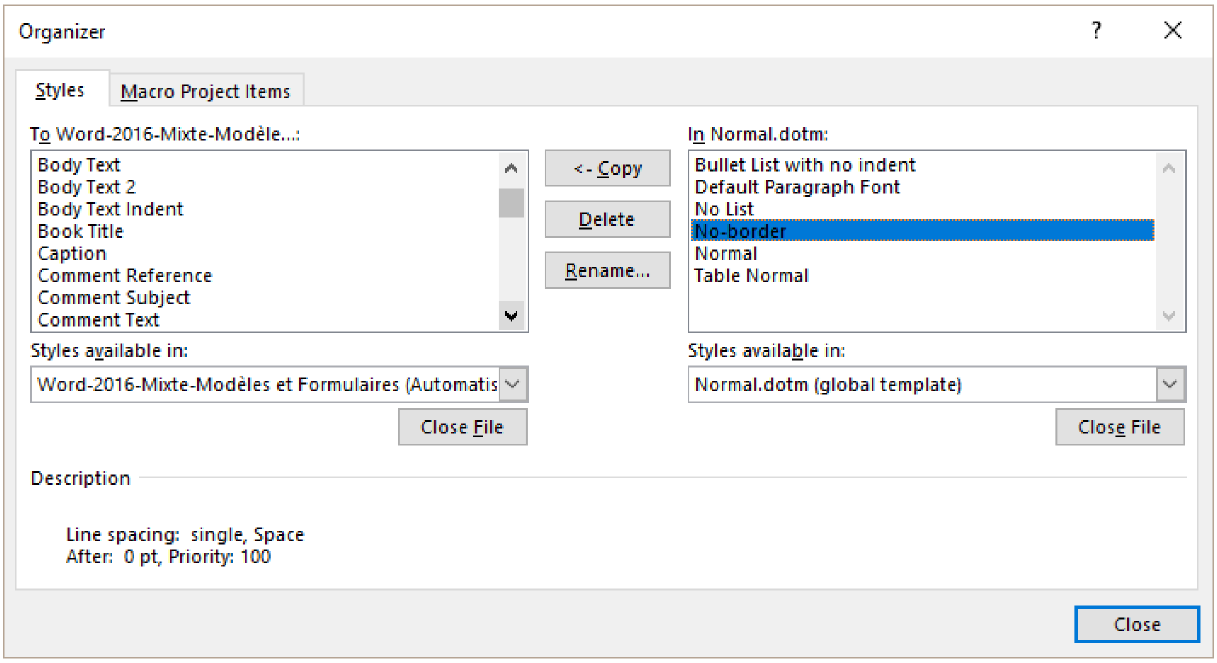
You may select one or more additional templates (always .dotx or .dotm files) - *global templates* – that you can activate with a simple click. The macros contained in the templates will be available **but not the styles.**

✐ Global templates can also be « add-in » that is programs (such as Snagit in the screen capture)

And on another workstation ? If the template path is a global address (on the network), no problem. But if the template has been saved on the local hard drive, the source template will be absent and you will not be able to retrieve macros or styles …

5.2.2 *Importing/Exporting styles (and macros)*

It is the ORGANIZER button, in the previous dialog box :



To Word-2016-Mixte-Modèle...:

- Body Text
- Body Text 2
- Body Text Indent
- Book Title
- Caption
- Comment Reference
- Comment Subject
- Comment Text

In Normal.dotm:

- Bullet List with no indent
- Default Paragraph Font
- No List
- No-border
- Normal
- Table Normal

Styles available in: Word-2016-Mixte-Modèles et Formulaires (Automatis

Styles available in: Normal.dotm (global template)

Description: Line spacing: single, Space After: 0 pt, Priority: 100

Selecting items with the usual Windows methods : CTRL and SHIFT

Styles	Styles can belong to a document or a template They can be copied between templates or standard documents. You can import/export new styles or existing styles that will overwrite the destination styles.
Macros	Macros can belong to a document or a template They can be copied between templates or standard documents but caution, you always copy a *project* that is all the macros contained in the file. If you need a specific macro, you must revert to the VBA editor.

Note : other possible access through the Styles Pane:

- HOME Tab – STYLES Group – Click on the dialog box launcher to display the Styles Pane - MANAGE STYLES Button (at the bottom of the pane) – IMPORT/EXPORT Button

6 Custom settings other than those saved in Normal.dotm

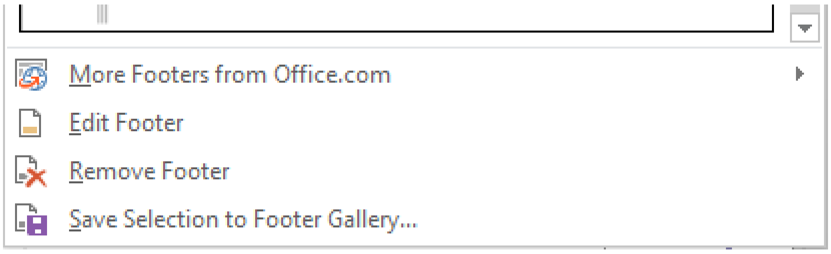
6.1 What can be saving in Building Blocks.dotx (autotext entries, custom header/footer, quick table …)

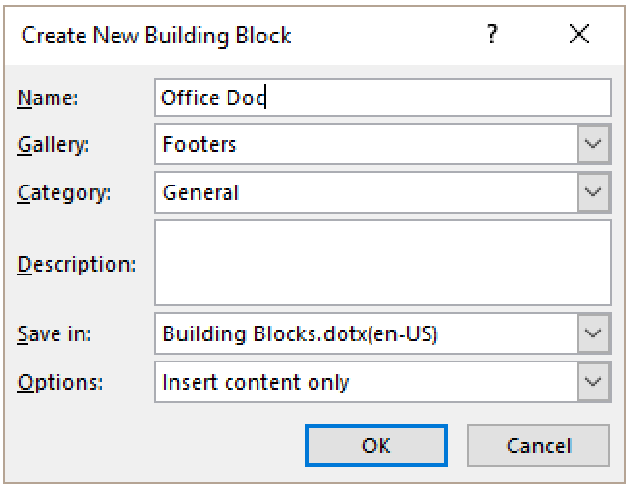
The steps are identical for all above items :

❶ Prepare the item to be customized (autotext entry, table …)
❷ Click on the save option (usually at the bottom of a gallery)
❸ Create the corresponding *building block* in the Building Blocks.dotx file (name, category, description).
❹ Insert the custom block from the corresponding gallery or using the blocks dialog box.

6.1.1 *Example : a custom footer*

- Prepare the footer
- Select its contents
- INSERT Tab – HEADER & FOOTER Group – FOOTER Button
- At the bottom of the gallery, you will find the SAVE option that will display the building blocks dialog box

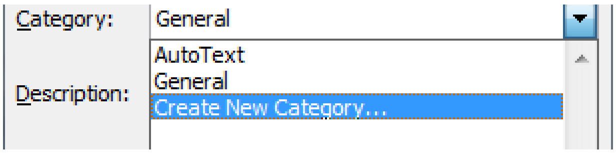

More Footers from Office.com
Edit Footer
Remove Footer
Save Selection to Footer Gallery...


Create New Building Block
?
OK
Cancel

Name: Office Doc
Gallery: Footers
Category: General
Description:
Save in: Building Blocks.dotx(en-US)
Options: Insert content only

Name	Keep the suggestion or replace it with an abbreviation.
Gallery	You can choose which gallery will display the entry. Usually this default suggestion is satisfactory as it corresponds to the nature of the item.

Category


Category: General

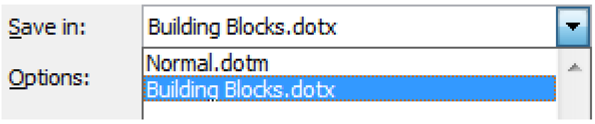
Description:

AutoText
General
Create New Category…

Block are organized in preset *categories.* By default the suggestion will be the *General* category but it would be advisable to create your own custom categories.

Description Type a short description if you wish.

Save in

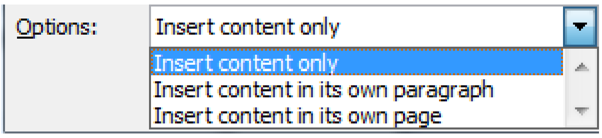

Save in: Building Blocks.dotx

Options:

Normal.dotm
Building Blocks.dotx

It is advisable to keep the default destination, namely *Building Blocks.dotx* But saving into Normal.dotm is given as an alternative. But caution, if a lot of blocks are saved in Normal.dotm, this file will finally become « overweighed » …

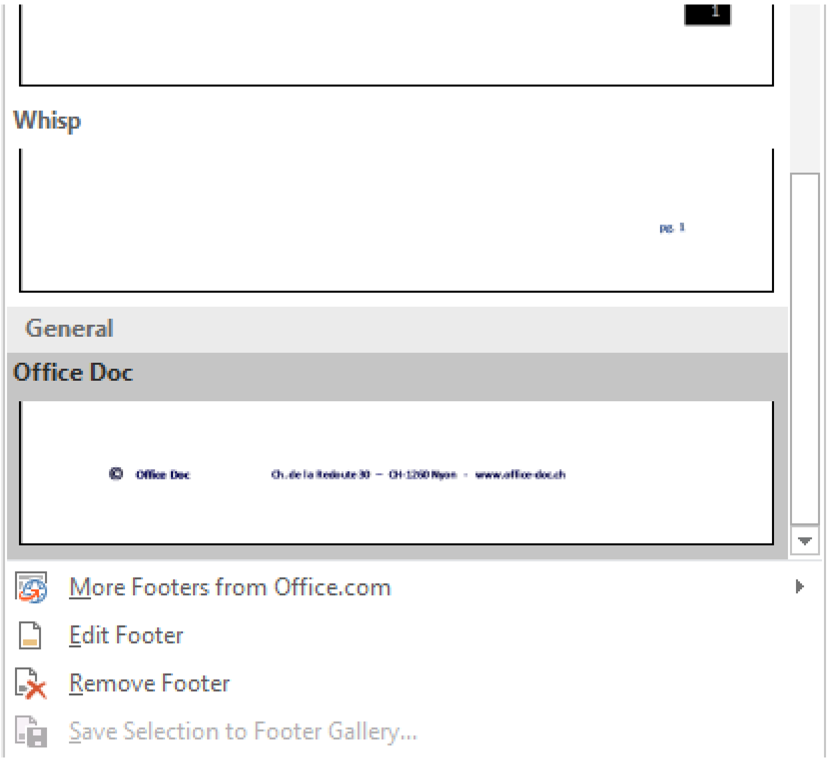
Options


Options: Insert content only

Insert content only
Insert content in its own paragraph
Insert content in its own page

Make your choice

- When you return to the gallery, custom footers are listed at its bottom (first for the French version) :


Whisp
pg. 1
General
Office Doc
More Footers from Office.com
Edit Footer
Remove Footer
Save Selection to Footer Gallery...

Same for a custom header, custom page number

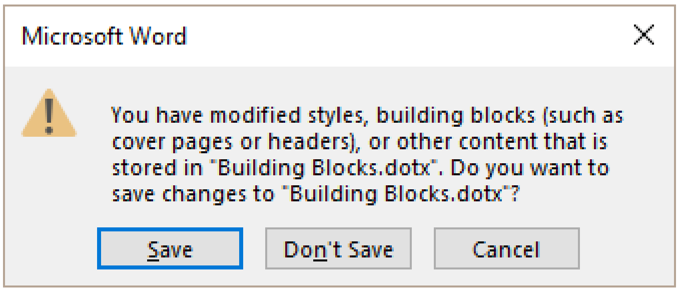
6.1.2 *Other items that can be customized and saved*

You can use the same method to customize and save :

A table	INSERT Tab – TABLES Group – TABLE – Option QUICK TABLES Button
A cover page	INSERT Tab – PAGES Group – COVER PAGE Button
A text box	INSERT Tab – TEXT Group – TEXT BOX Button
A watermark	PAGE LAYOUT Tab – PAGE BACKGROUND Group – WATERMARK Button
A table of contents	REFERENCES Tab – TABLE OF CONTENTS Group – TABLE OF CONTENTS Button
A bibliography	REFERENCES Tab – CITATIONS & BIBLIOGRAPHY Group – BIBLIOGRAPHY Button

6.1.3 *When is the Building Blocks.dotx file saved ?*

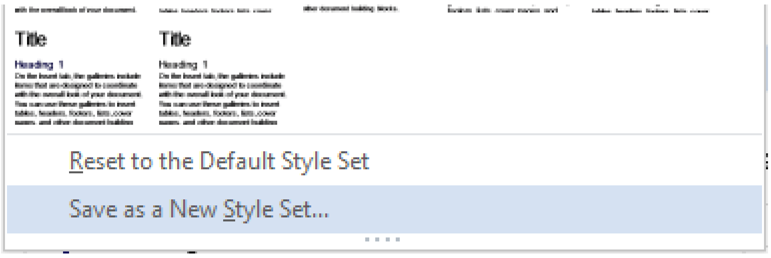
It is done **always manually** when you exit Word :



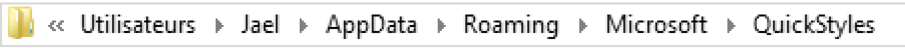
You have modified styles, building blocks (such as cover pages or headers), or other content that is stored in "Building Blocks.dotx". Do you want to save changes to "Building Blocks.dotx"?

6.2 Custom style set (.dotx file)

- DESIGN Tab – DOCUMENT FORMATTING Group
- Option at the bottom of the style set gallery



- A .dotx file is saved at the following address :



« Utilisateurs ▸ Jael ▸ AppData ▸ Roaming ▸ Microsoft ▸ QuickStyles

- The CUSTOM section of the gallery will show the style set

6.3 Creating a corporate theme (the company's theme)

6.3.1 User assigned as responsible for corporate templates

This person will create a *colors and fonts scheme.* An .xml file will be created for each scheme. The whole set (colors-fonts-effects) will be saved as a theme (a .thmx file). **All of this should be done from PowerPoint** because the theme will include many items from the Master.

All these files will be stored on the user's local hard drive. Then the theme will be applied to all the Office company's templates (Word, Excel, etc …).

Finally, the theme will be either *installed* on each user's workstation or *sent* to each user with instructions on how to install the theme and make it available to any Office file.

6.3.2 The other users or « end-users »

The theme has been saved onto the local hard drive
It is displayed in the themes gallery and is available to any Office file.

No theme file on the hard drive
The theme is not displayed in the themes gallery and is not available to any Office file.

How to retrieve the theme ? If you receive a file from the outside but containing the theme, it will be present when you edit the file. If your company has a PowerPoint template, the theme has certainly been applied to it. *Indeed the theme is incorporated into the file – but this is invisible. To check it : create an item using an automatic sequence of colors – you will see that the theme colors have been applied* automatically.

Open the file that contains the theme (preferably the PowerPoint one)

Save the current theme onto the hard disk (option at the bottom of the themes gallery). And if you also want to change something in the colors/fonts schemes, then click on the CREATE NEW THEME COLORS / FONTS … option and save the files.

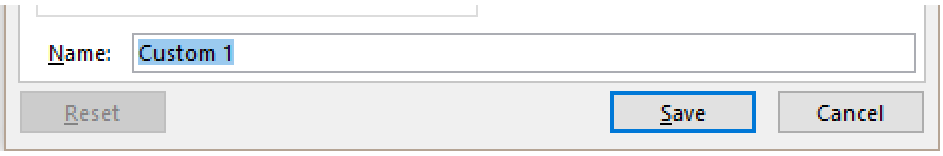
Explained here below :

6.3.3 Saving a custom theme

You should start by creating the colors and fonts scheme

- Apply a scheme that is a near as possible from what you need
- At the bottom of the colors / fonts galleries, click on CUSTOMIZE COLORS / FONTS
- Change as necessary and **save the scheme**

- Do not leave the name on the default *Custom 1 ….*


Name: Custom 1

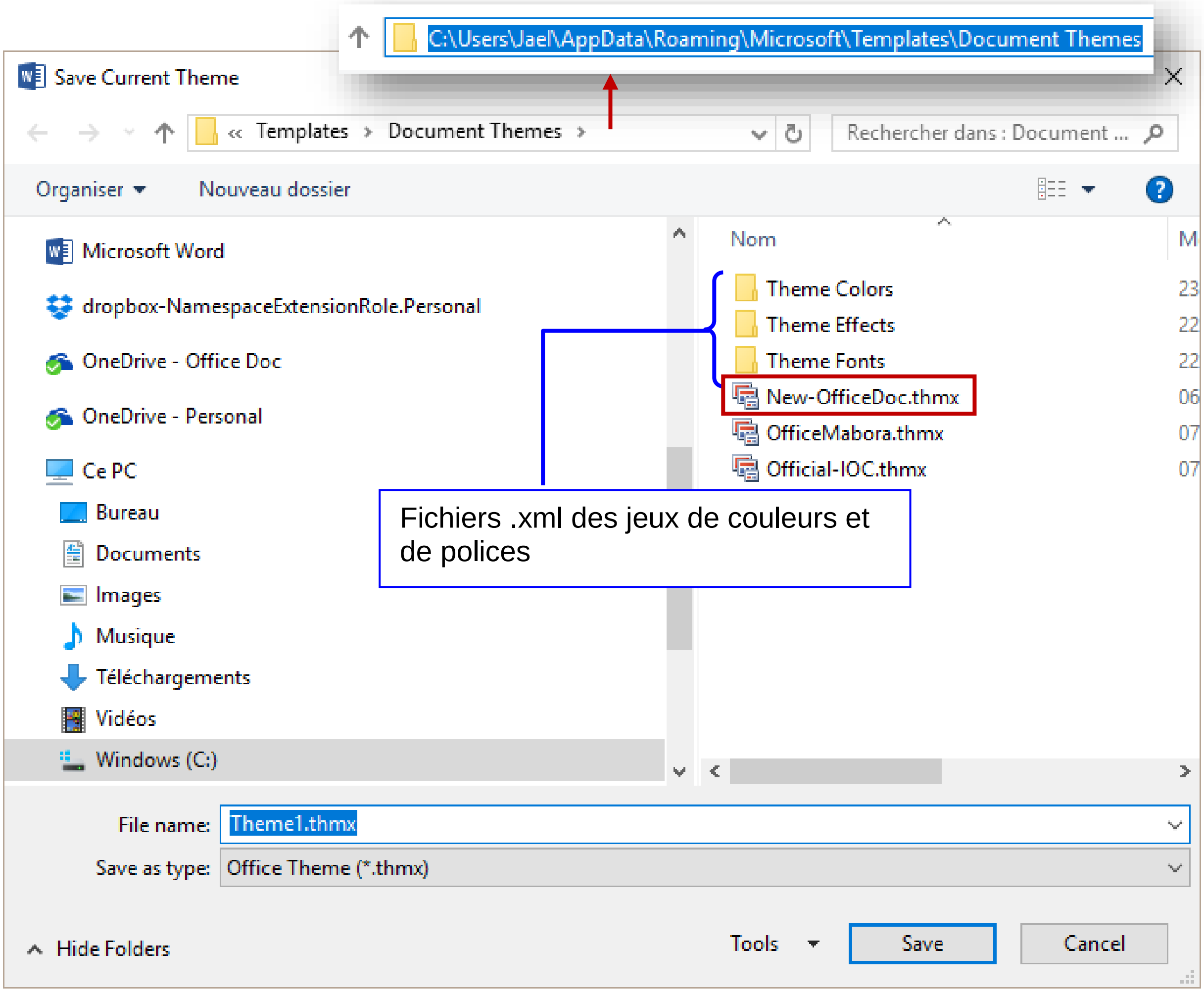
Reset
Save
Cancel

The dialog box does not mention it but the colors / fonts scheme is saved as an .xml file in the corresponding subfolder of THEMES (next screen capture)

It is not possible to save the effects scheme (although the corresponding subfolder does exist)

Save the 3 items as a theme

- In the theme gallery click on SAVE CURRENT THEME


C:\Users\Jael\AppData\Roaming\Microsoft\Templates\Document Themes

Fichiers .xml des jeux de couleurs et de polices

File name: Theme1.thmx

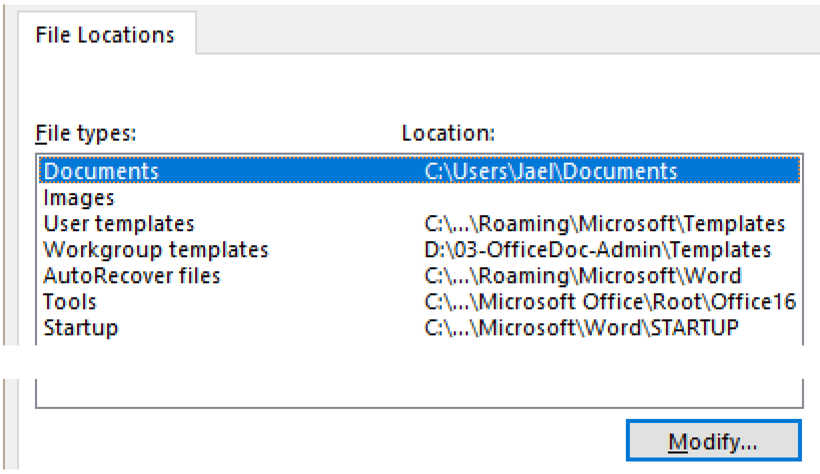
Save as type: Office Theme (*.thmx)

Save Current Theme
« Templates › Document Themes ›
Rechercher dans : Document ...
Organiser
Nouveau dossier
Microsoft Word
dropbox-NamespaceExtensionRole.Personal
OneDrive - Office Doc
OneDrive - Personal
Ce PC
Bureau
Documents
Images
Musique
Téléchargements
Vidéos
Windows (C:)
Nom
Theme Colors
Theme Effects
Theme Fonts
New-OfficeDoc.thmx
OfficeMabora.thmx
Official-IOC.thmx
Hide Folders
Tools
Save
Cancel

Note : the above folders are hidden by default. Therefore they appear when you save the files but will not be displayed in the Windows Explorer.

7 General (not related to templates) : default location for documents and picture files

- FILE - OPTIONS – ADVANCED Category – GENERAL Section (the last one) – FILE LOCATIONS Button



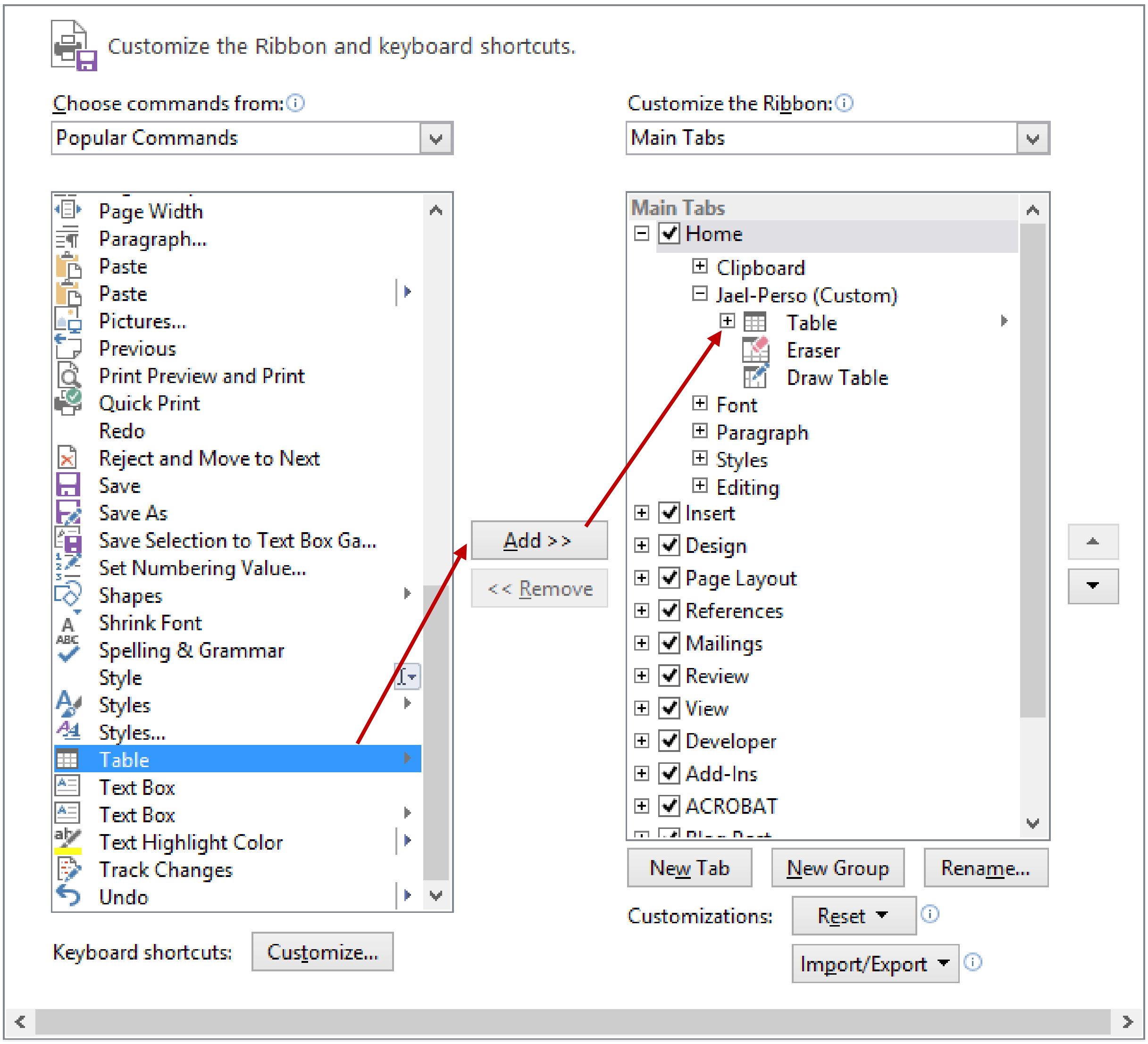
File types:	Location:
Documents	C:\Users\Jael\Documents
Images	
User templates	C:\...\Roaming\Microsoft\Templates
Workgroup templates	D:\03-OfficeDoc-Admin\Templates
AutoRecover files	C:\...\Roaming\Microsoft\Word
Tools	C:\...\Microsoft Office\Root\Office16
Startup	C:\...\Microsoft\Word\STARTUP

This dialog box has already been explained in the topic about templates but it is important to mention that a default location can also be set for other types of files, such as standard documents.

Documents	What will be the default folder when you open or save a standard document ? When you install Office, the default folder will be the DOCUMENTS folder (a subfolder in your Windows profile that is created when you install Windows). But you can set another folder. *Note : in the SAVE category, the following option is equivalent : DEFAULT FILE LOCATION* *If you try to indicate another folder, there is no priority of one option over the other. When you close the current session, the path is automatically updated according to the last modified folder.* ✏ What you set in Word has no incidence on the folder set for Excel or PowerPoint.
Clipart pictures	What will be the default folder when you insert a picture file ? 💣 If the line is empty (by default), Word displays the last folder into which you have selected a picture file. You may define a specific folder but the snag is that you can no longer revert to this empty line …
Startup	Any file stored into this folder will be launched when you run Word.

8 Customizing the Ribbon

- Right click any tab on the Ribbon – CUSTOMIZE THE RIBBON
- FILE – OPTIONS - CUSTOMIZE RIBBON Category



Customize the Ribbon and keyboard shortcuts.

Choose commands from: Popular Commands

Customize the Ribbon: Main Tabs

Page Width
Paragraph...
Paste
Paste
Pictures...
Previous
Print Preview and Print
Quick Print
Redo
Reject and Move to Next
Save
Save As
Save Selection to Text Box Ga...
Set Numbering Value...
Shapes
Shrink Font
Spelling & Grammar
Style
Styles
Styles...
Table
Text Box
Text Box
Text Highlight Color
Track Changes
Undo
Add >>
<< Remove
Main Tabs
Home
Clipboard
Jael-Perso (Custom)
Table
Eraser
Draw Table
Font
Paragraph
Styles
Editing
Insert
Design
Page Layout
References
Mailings
Review
View
Developer
Add-Ins
ACROBAT
New Tab
New Group
Rename...
Customizations:
Reset
Import/Export
Keyboard shortcuts:
Customize...

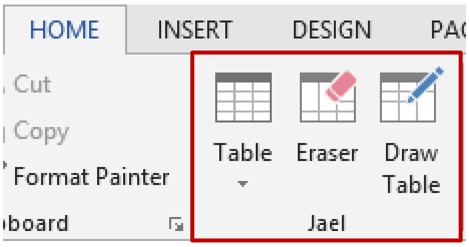
8.1 Adding a button

- On the left : display the button you need to add
- On the right : prepare the destination : *create a new tab+group or simply add a group to an existing tab.*
- Then click on the ADD button.

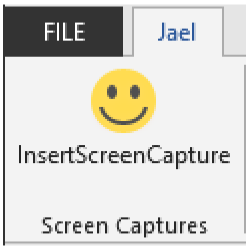
You are not allowed to remove a tab (you can only hide it). You can remove groups (they can later on be retrieved from the left pane). You cannot remove or modify the source buttons.

Examples :

Existing tab

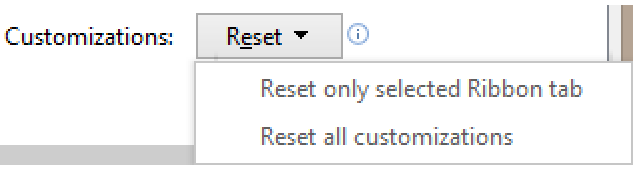

HOME
INSERT
DESIGN
PA
Cut
Copy
Format Painter
board
Table
Eraser
Draw Table
Jael

New tab


FILE
Jael
InsertScreenCapture
Screen Captures

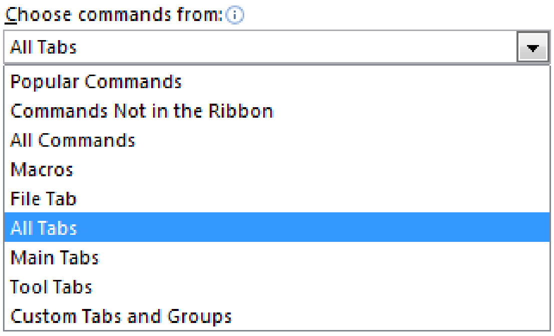
8.2 Restoring the Ribbon

Click on the RESET button


Customizations:
Reset
Reset only selected Ribbon tab
Reset all customizations

Choose the « level » of restore
Caution : all customization will be lost

If you wish to restore a group you have removed accidentally, you can do so manually :

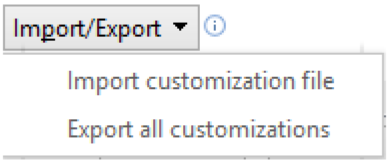

Choose commands from:
All Tabs
Popular Commands
Commands Not in the Ribbon
All Commands
Macros
File Tab
All Tabs
Main Tabs
Tool Tabs
Custom Tabs and Groups

Expand the required tab and add the corresponding group

8.3 Exporting or importing a custom Ribbon and Quick Access toolbar

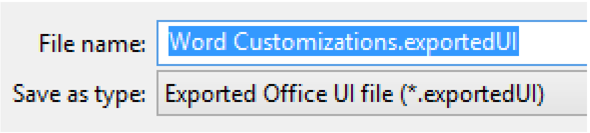
Export

Click on the IMPORT/EXPORT


Import/Export
Import customization file
Export all customizations

Save dialog box

The file format :



File name: Word Customizations.exportedUI

Save as type: Exported Office UI file (*.exportedUI)

Destination : a folder in your profile but you may select any folder

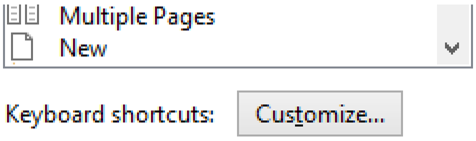
Import

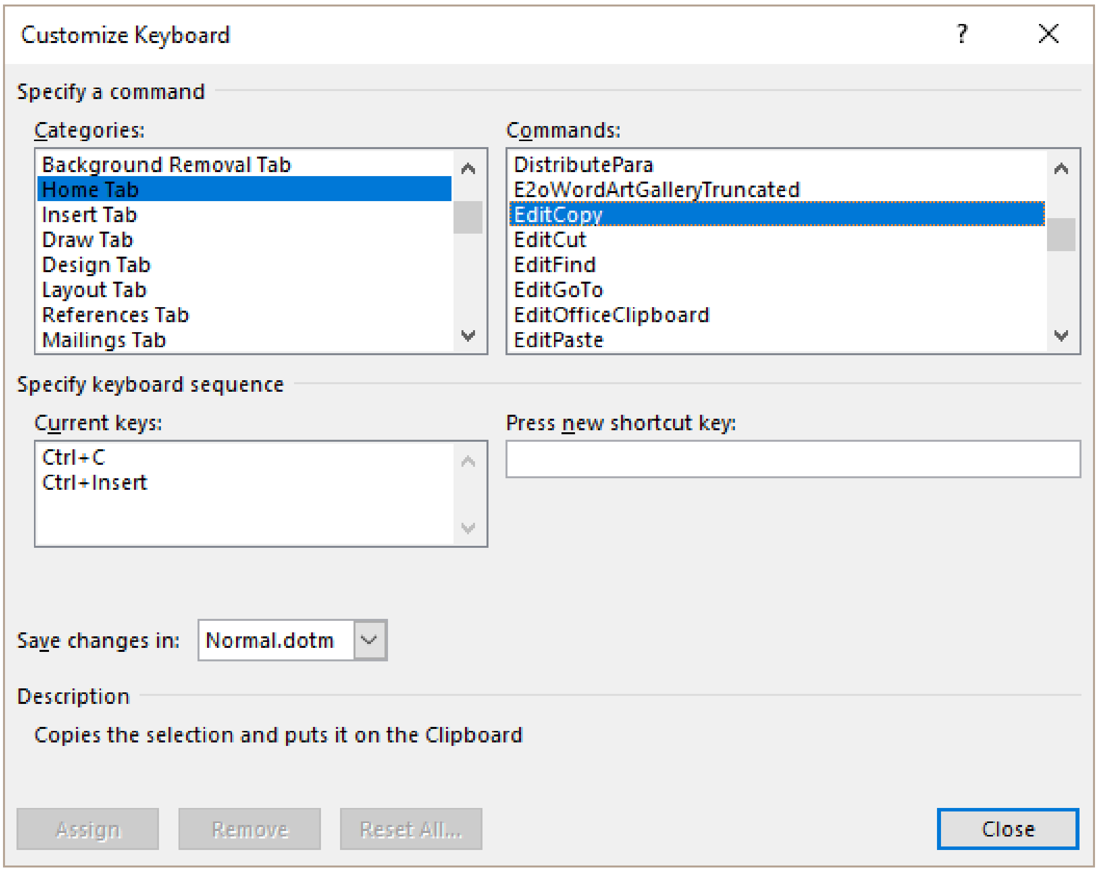
Select the IMPORT CUSTOMIZATION FILE option
Select the required export file
You will be prompted to confirm

Export / import affects both the Ribbon and the Quick Access. It is not possible to split.

8.4 Keyboard shortcuts

- Click on the CUSTOMIZE button at the bottom of the customizing dialog box (in the Word Options).





Specify a command

Categories:
Background Removal Tab
Home Tab
Insert Tab
Draw Tab
Design Tab
Layout Tab
References Tab
Mailings Tab

Commands:
DistributePara
E2oWordArtGalleryTruncated
EditCopy
EditCut
EditFind
EditGoTo
EditOfficeClipboard
EditPaste

Specify keyboard sequence

Current keys:
Ctrl+C
Ctrl+Insert

Press new shortcut key:

Save changes in: Normal.dotm

Description
Copies the selection and puts it on the Clipboard

Some commands have preset keyboard shortcuts such as **Ctrl + g** for bold, **Ctrl + i** for italic and **Ctrl + u** for underscore. Please note in the above screen capture that the EditCopy command has 2 preset shortcuts : Ctrl + C or the classical Windows shortcut that everyone knows and an old one (as old as the Word for Windows 1 release …)

Delete	Select the combination and click on the REMOVE button

New shortcut	In *SPECIFY KEYBOARD SEQUENCE* Press the combination (in real) – just check that it is unassigned – this indication is mentioned just below the *Current keys* list. Then click on the ASSIGN button
The RESET ALL Button	Caution : **all** combinations are reset and not only those you have modified.

9 Customizing the Quick Access toolbar

You certainly master the first "level" of this customization : adding buttons to the bar, placing the bar above or below the ribbon. *Reminder on how to add a button to the toolbar : right click any button or command and click on ADD TO QUICK ACCESS TOOLBAR.*

Customizing can go deeper :

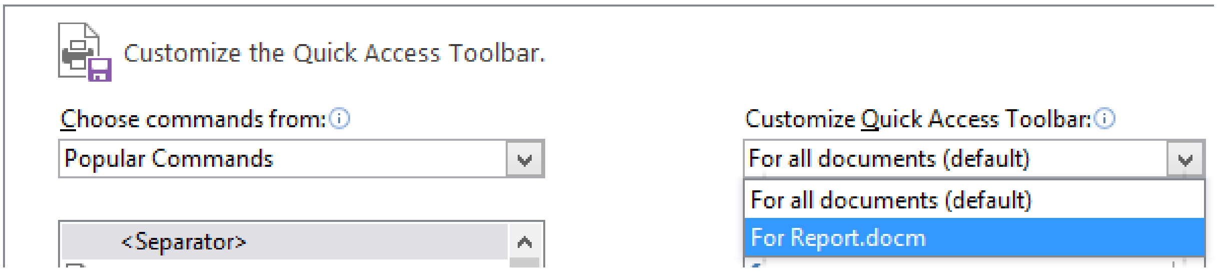
- Special buttons for a given file
- Buttons running macros

Right click any button on the ribbon : CUSTOMIZE QUICK ACCESS TOOLBAR *or* FILE – OPTIONS – QUICK ACCESS TOOLBAR Category

9.1 Buttons displayed only in a given document or template

It is possible to set buttons for commands, macros … **that will be displayed only in the document/template itself or in any new document created on this document/template.**

Simply specify so in the customize dialog box :



Customize the Quick Access Toolbar.

Choose commands from: Popular Commands

Customize Quick Access Toolbar: For all documents (default)

Once you have indicated the required file (document or template), the commands that you add will be added to THIS file only and will be displayed at the right end of the Quick Access toolbar.

9.2 Buttons to insert autotext entries, styles or to run macros

It is not possible to modify the look of the buttons assigned to preset commands
It is not possible to assign buttons to autotext entries or to styles

It is possible to assign buttons to macros. See the chapter about macros.

10 Recap of all custom files since Word 2007

In the previous versions, **THE** GLOBAL WORD TEMPLATE was *Normal.dot* and it contained all the user customization (auto text entries, macros, custom toolbars, styles etc …). There were other files such as the custom dictionary, the user custom autocorrect entries … but on the whole, one could say the basic important file was Normal.dot.

This template is now named *Normal.dotm* since the 2007 release. But it no longer contains *all the customization*. Additional files come into the picture. And these files are important, not at all « accessory » :

Here below for your information, a list copied from the Internet (if you are working with Windows Vista, you need to add the *Roaming* folder between Application Data and Microsoft)

- Content controls – the famous Building Blocks

  Building Blocks.dotx
  C:\Users\*name*\AppData\Microsoft\Document Building Blocks\1033 for English and 1036 for French

- Custom style sets

  File.dotx
  C:\Users\name\AppData\Microsoft\QuickStyles

- Custom theme

  File.thmx for the theme and File.xml for the colors and fonts schemes
  C:\Users\nameAppData\Microsoft\Templates\Document Themes
  Inside this folder, 2 subfolders : Theme fonts and Theme colors and Theme effects.

- Custom dictionaries

  Custom.dic (and the .lex files for exceptions)
  C:\Users\name\AppData\Microsoft\UProof

- Custom autocorrect entries

  Several .acl files
  C:\Users\name\AppData\Microsoft\Office\1033 for English and 1036 for French

- Customized Ribbon and Quick Access toolbar

  An export file can be created (from the Options) with the following extension : exportedUI.
  Destination folder is up to you.

AUTOMATING

1 Forms

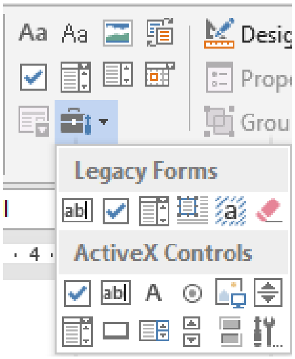
There are several tools to create forms, tools that can be used separate or combined :

- Form using content controls or form controls
- [Click here] field codes
- Fill-in boxes

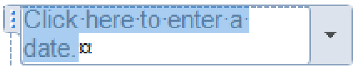
* The last two types correspond to *field codes.* Some explanations on codes can be found at the following topic : The concept of field codes page **Erreur ! Signet non défini.**

1.1 Forms using *form controls*

DEVELOPER Tab – CONTROLS Group



1.1.1 Two types of controls

The new 2007 content controls	These are the new controls that you may have used in headers and footers	 Click here to enter a date.
Form controls – also renamed « Legacy forms »	The form controls of the previous versions : text boxes, check boxes and drop-down field	

1.1.2 Content controls

a) Creating

Characteristics

Aa	*Rich Text* Several lines are possible (ENTER – SHIFT + ENTER) The user can format specific words (bold, italic, color …)
Aa	*Text* Only one paragraph (ENTER and SHIFT + ENTER do not work) Any format is applied to the whole text

Picture Content Control

Selecting a picture file
Few modifications are available : light, contrast and some effects

Building Block Gallery

Gallery of custom autotext entries

Check Box

Simple click to tick on/off

Combo Box

Drop-down list (the list of items needs to be defined in the control properties).
It is allowed to type manually.

Drop-down List

Drop-down list (the list of items needs to be defined in the control properties).
It is not allowed to type manually

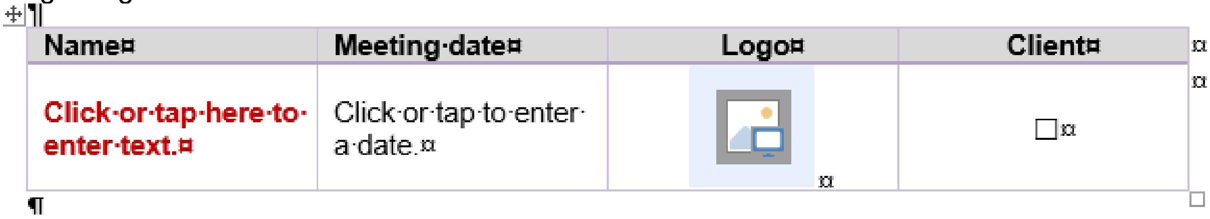
Date Picker

Date navigator to select the required date

New since 2013 : Repeating Section

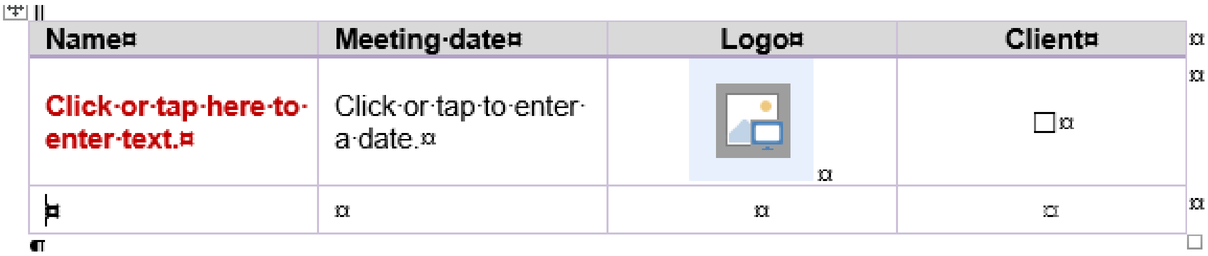
Used mainly with tables. Will give you the possibility to copy a table row containing content controls without having to do so manually.

Beginning of a form



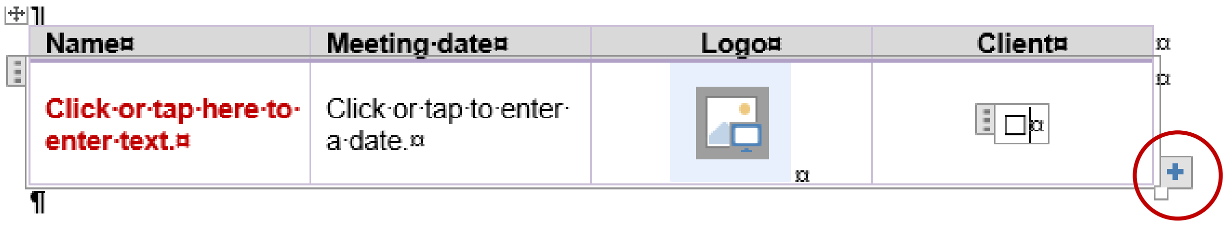
Name¤	Meeting·date¤	Logo¤	Client¤
Click·or·tap·here·to·enter·text.¤	Click·or·tap·to·enter·a·date.¤	¤	☐¤

What will happen if you press the TAB key on the table last cell :



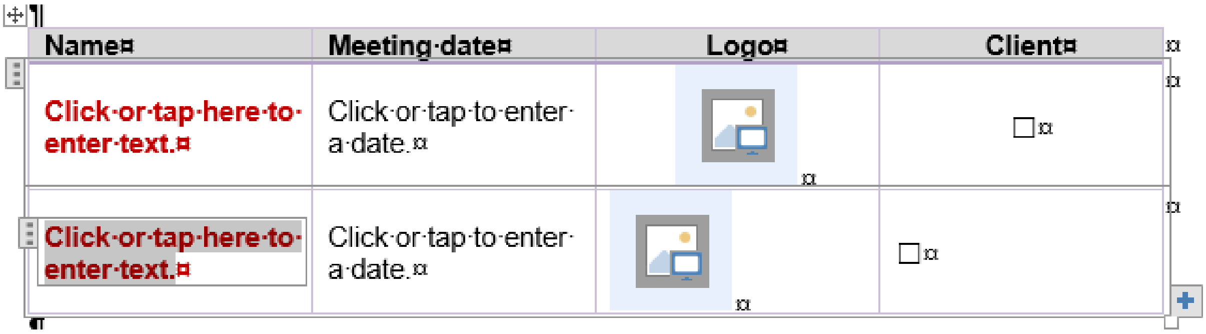
Name¤	Meeting·date¤	Logo¤	Client¤
Click·or·tap·here·to·enter·text.¤	Click·or·tap·to·enter·a·date.¤	¤	☐¤
¤	¤	¤	¤

Select the row containing the content controls and then press the corresponding button :



Name	Meeting date	Logo	Client
Click or tap here to enter text.	Click or tap to enter a date.		☐

Clicking on the + button will produce the following result :



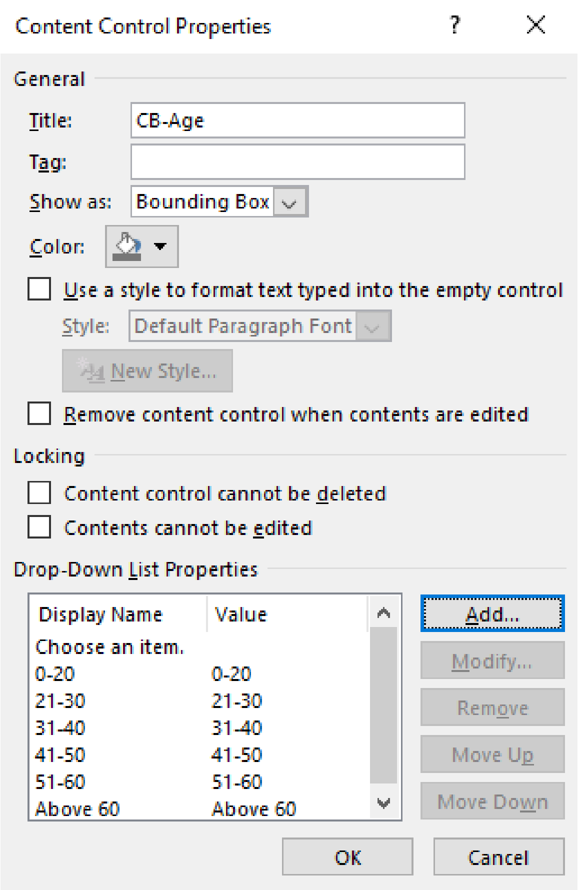
Name	Meeting date	Logo	Client
Click or tap here to enter text.	Click or tap to enter a date.		☐
Click or tap here to enter text.	Click or tap to enter a date.		☐

Content controls are copied – including any format
Any normal text will also be copie – up to you to change it
A ticked check box will be copied but always unticked
The paragraph formatting must often be finetuned – as here the horizontal alignment

b) The content control Properties

- Select the content control
- Click on the Properties button

(here a drop-down list)



Content Control Properties

General

Title: CB-Age

Tag:

Show as: Bounding Box

Color:

☐ Use a style to format text typed into the empty control

Style: Default Paragraph Font

New Style...

☐ Remove content control when contents are edited

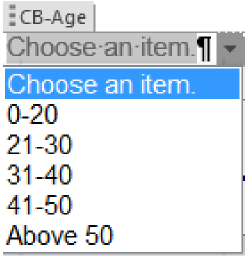
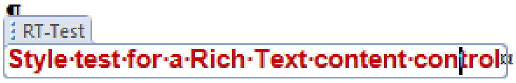
Locking

☐ Content control cannot be deleted

☐ Contents cannot be edited

Drop-Down List Properties

Display Name	Value
Choose an item.	
0-20	0-20
21-30	21-30
31-40	31-40
41-50	41-50
51-60	51-60
Above 60	Above 60

Title	Once the control has been created, it is sometimes difficult to know which type of control has been inserted :*Rich Text* or *Text ? Combo Box* or *Drop-Down List ?*. The title is displayed at the top and this can help.  CB-Age Choose an item. Choose an item. 0-20 21-30 31-40 41-50 Above 50
Use a style to format contents – choosing from the drop-down list	To format the text typed into the content control  Style test for a Rich Text content control
Content control cannot be deleted	To protect the control
Content cannot be edited	The control can be deleted but not edited. For a text it is impossible to overtype, for a drop-down list there is no list.
Drop-down List Properties	The first option is usually *Choose an item.* You can keep this or remove it. Click on the ADD button to create the list, on the MOVE UP/MOVE DOWN buttons to change the order etc …

To mention: the Microsoft preset control contents used in headers, footer …. can be modified through the same Properties box.

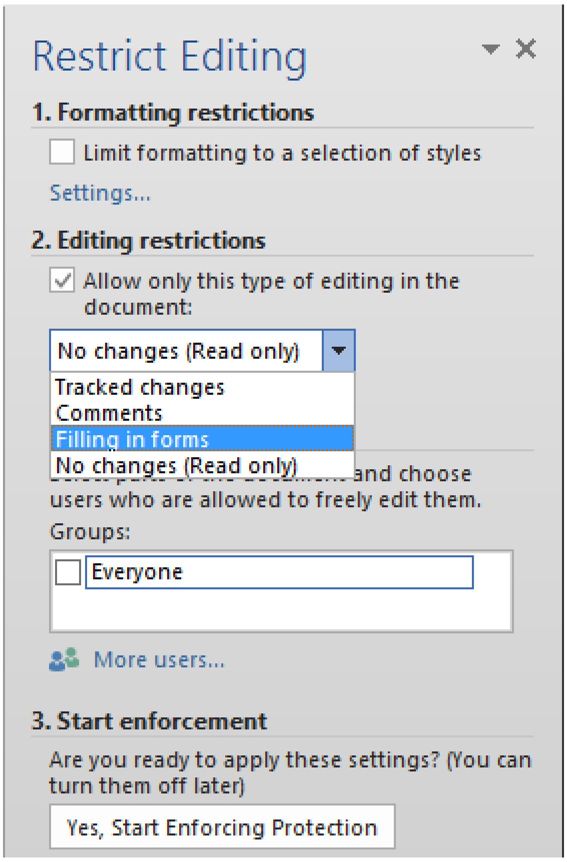
c) Using the form

There is nothing special to prepare : save your file (as a standard document or a template) Users create a new file based on the form, fill-in the content controls and save their file separately.

d) General protection of the document containing the form

Protecting the file will let users fill-in the controls but prevent editing the surrounding text :

- DEVELOPER Tab – PROTECT Group – PROTECT DOCUMENT Button – RESTRICT EDITING



Restrict Editing

1. Formatting restrictions

☐ Limit formatting to a selection of styles

Settings...

2. Editing restrictions

☑ Allow only this type of editing in the document:

No changes (Read only)

Tracked changes
Comments
Filling in forms
No changes (Read only)

...and choose users who are allowed to freely edit them.

Groups:

☐ Everyone

More users...

3. Start enforcement

Are you ready to apply these settings? (You can turn them off later)

Yes, Start Enforcing Protection

- Turn on ALLOW ONLY THIS TYPE OF EDITING IN THE DOCUMENT
Select FILLING IN FORMS

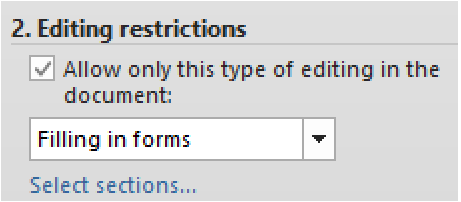
- Then click on YES, START ENFORCING PROTECTION

- Caution : the whole document will be protected, only the form controls remain accessible : check boxes, drop-down lists etc …

e) Protecting the document but leaving some parts free for editing

Each portion that needs to remain « access free » needs to be defined as a *section.*
(Reminder : PAGE LAYOUT Tab – PAGE SETUP Group – BREAKS Button)

- DEVELOPER Tab – PROTECT Group – PROTECT DOCUMENT Button.
Provided sections have been created, an additional option will be displayed :

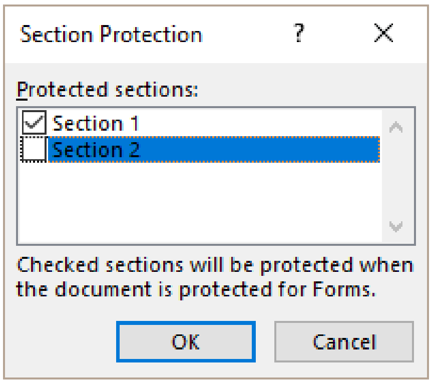


2. Editing restrictions

☑ Allow only this type of editing in the document:

Filling in forms

Select sections...


Section Protection

Protected sections:

☑ Section 1
☐ Section 2

Checked sections will be protected when the document is protected for Forms.

Select as required (by default all sections are on) then validate and finally turn on the protection as usual.

f) Filling a protected form

Navigation Click with the mouse or press the DOWN arrow

g) Printing the form

No difference between print preview and final printout

FILLED textbox, drop-down list … : the content control itself is not printed, only the typed text or the selected item in a drop-down list, the chosen date, the inserted picture …

EMPTY textbox, drop-down list : printed as such

Check box … : the full control is obviously printed and not only the tick mark !

Advantages and drawbacks	*Advantage* : the protection is not a preliminary condition to activate the form. Controls are ready to use with no protection. *Drawback* : the absence of an *Option Button* control

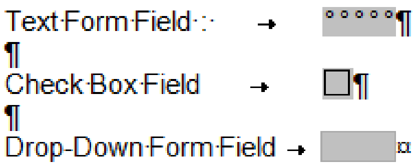
1.1.3 Forms using form controls (now called Legacy forms)

These are the controls displayed by the button (screen capture page 35)
They are the controls of the previous version for the tear-off upper part and the Active X controls for the lower part (the latter are not part of this documentation).

a) Inserting a form control

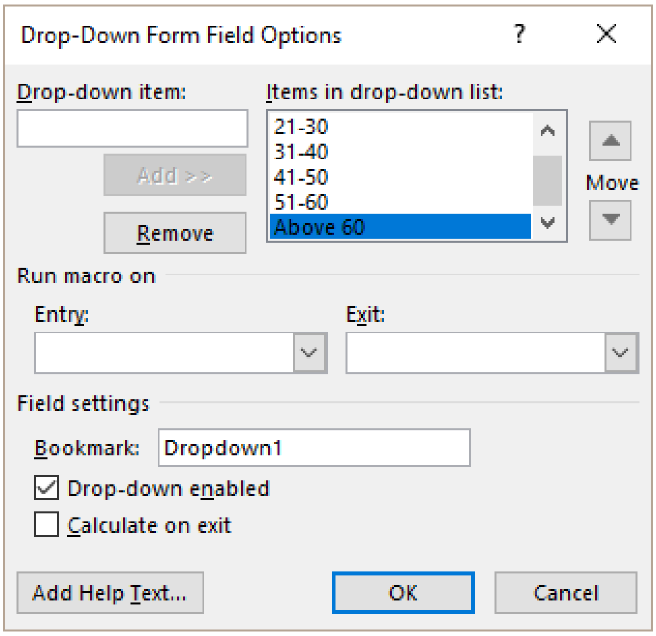
- Click on the required form control

Here after three controls :


Text·Form·Field·:· → °°°°°¶
¶
Check·Box·Field → ☐¶
¶
Drop-Down·Form·Field → ¤

The controls are displayed with a grey shading because they are *field codes*
To toggle the field codes : SHIFT + F9 for the current field or ALT + F9 for all fields.

As for the other controls, the PROPERTIES button will display options to define the control values and other settings (pre-activated check box, the required entries for a drop-down list and so on)



Drop-down item:

Items in drop-down list:
21-30
31-40
41-50
51-60
Above 60

Run macro on
Entry:
Exit:

Field settings
Bookmark: Dropdown1
☑ Drop-down enabled
☐ Calculate on exit

✎ Text controls : use the properties options to define the nature of what will be typed (only text or numbers, any date or the current date etc …)
Important note about the current date : when the form is active, the code is not automatically updated when you open the document and the old F9 on the code has no incidence either. Updating is done once you have finished navigation and filled-in the last control.

b) *Activating the form (protection)*

The main characteristic of form control sis that they work only when the document is in active protection. If you do not protect the document, the boxes cannot be checked/unchecked and the drop-down lists show no list of entries.
See topic on general protection – page 38.

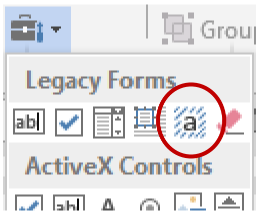
c) *Filling the form*

More possibilities than the content controls :

Navigation :	ENTER, TAB or arrows
To go to the previous field :	SHIFT + TAB + TAB or UP arrow
To display a drop-down list :	Click on the arrow or F4
To check/uncheck the check box field :	Click on it, or press SPACE BAR or X
To display the help text :	F1

d) *Displaying and printing the form*

Displaying : codes are displayed with a gray shading (like field codes). This helps to spot them on the form. If you do not want to display the shading, click on this button :



Print Preview : controls are displayed, this can be misleading …

Printing : controls are not printed, only the typed text, the choice made for a drop-down list (except the check box of course)

e) *Printing the form controls on pre-printed paper*

FILE - OPTIONS Button – ADVANCED Category – WHEN PRINTING THIS DOCUMENT Section – PRINT ONLY THE DATA FROM A FORM Option	If you have pre-printed paper, you just need to print the form data. You can simply insert a paper sheet in the printer and go ahead …

f) *Retrieving the data for a database*

FILE - OPTIONS Button – ADVANCED Category – PRESERVE FIDELITY WHEN SHARING THIS DOCUMENT Section – SAVE FORM DATA AS DELIMITED TEXT FILE Option	To export the data as records that can be added to a given database. For instance you could work with the following record : *"John Smith";1;0;"Basic Insurance"* (the created document is automatically a *.txt file).

How to proceed :

- When you are ready to start filling the « database » : turn on the above option
- Click on the floppy button to generate a .txt file. Name it and confirm the Windows "conversion"
- Open this .txt file in Excel. The convert Wizard is automatically launched. Follow the instructions
- Save this file as an Excel file. It will be your Excel *database.*
- Do the same for the other records : for each set of data you will create a .txt file that you will convert. Then copy-paste the new record into the *database* Excel file.
- Replace all the 1/0 by YES/NO
- When you have finished, do not forget to turn off the above option

✏ We tried this option with the content controls rather than the above legacy forms : it doesn't work.

Advantages and drawbacks	Drawback : protection is compulsory, which makes the form heavy to work with.

1.2 The [click here] field

1.2.1 *Its "normal" (but very rare) use*

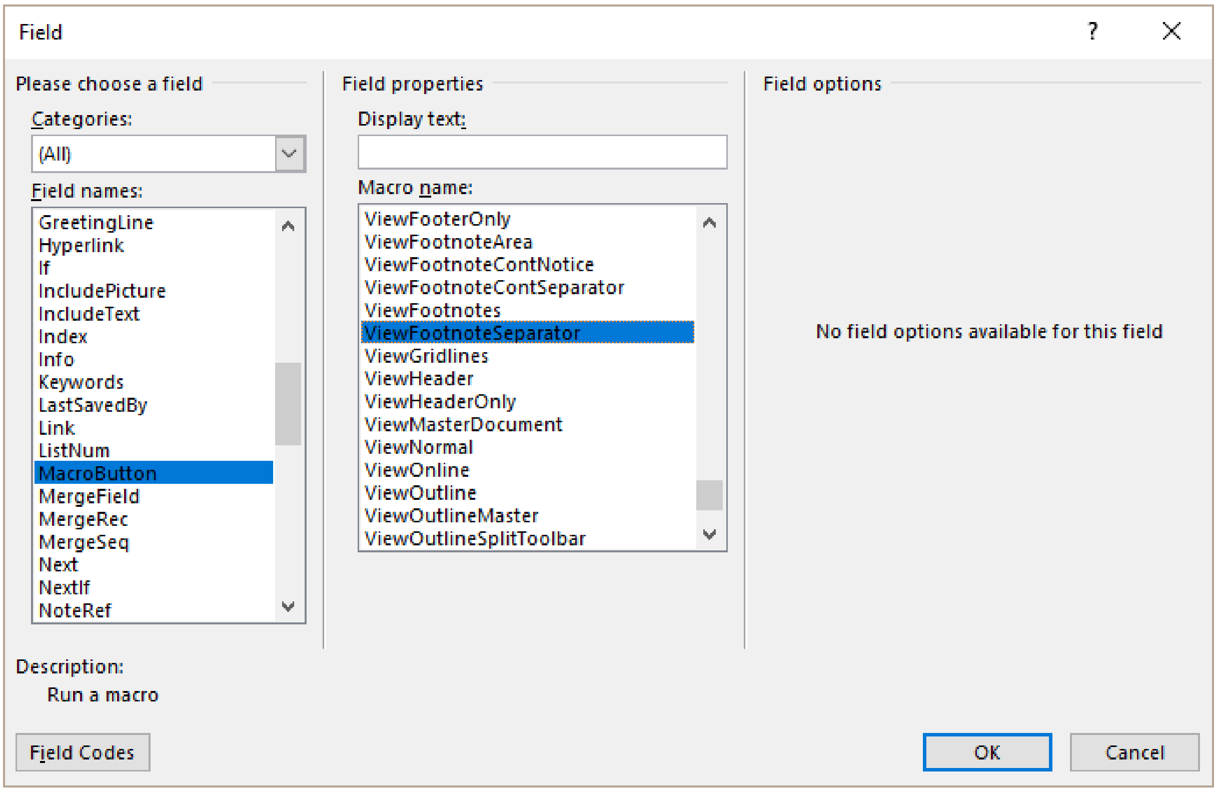
The field to choose is MACROBUTTON. It runs a pre-set Word macro command when you double-click it.

For instance, the following MACROBUTTON displays the footnote separator inside a pane at the bottom of the document (it might be far more complicated to tell the user that the separator can only be displayed in the Draft view mode when you double-click on a footnote reference …)

[Double click to display footnote separator]

Create :

- INSERT Tab – TEXT Group – QUICKPARTS Button – FIELD Option


Field

Please choose a field

Categories: (All)

Field names:

GreetingLine
Hyperlink
If
IncludePicture
IncludeText
Index
Info
Keywords
LastSavedBy
Link
ListNum
MacroButton
MergeField
MergeRec
MergeSeq
Next
NextIf
NoteRef

Field properties

Display text:

Macro name:

ViewFooterOnly
ViewFootnoteArea
ViewFootnoteContNotice
ViewFootnoteContSeparator
ViewFootnotes
ViewFootnoteSeparator
ViewGridlines
ViewHeader
ViewHeaderOnly
ViewMasterDocument
ViewNormal
ViewOnline
ViewOutline
ViewOutlineMaster
ViewOutlineSplitToolbar

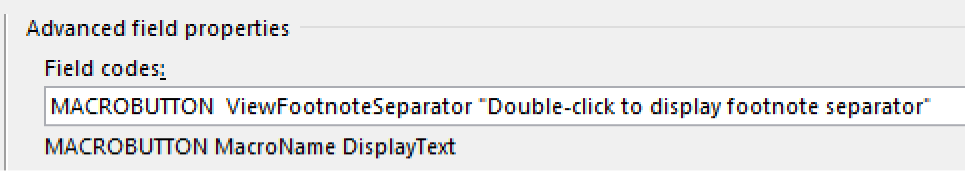
Field options

No field options available for this field

Description:
Run a macro

Validate and the following field will be generated : "Double-click to open header pane".

If you wish to remove the quotes or replace them by parenthesis, brackets, you can do so later on (right click on the field and select the EDIT FIELD option) but you may do it right in the above dialog box by clicking on the Field Codes button.


Advanced field properties

Field codes:

MACROBUTTON ViewFootnoteSeparator "Double-click to display footnote separator"

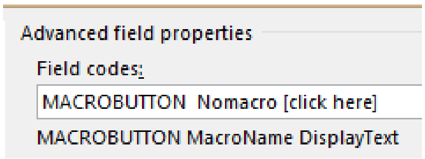
MACROBUTTON MacroName DisplayText

and replace the quotes manually.

The user will double-click on the field to run the command assigned to MACROBUTTON (In the case of notes, a minimum of 1 footnote is required or the macro will not run properly). **This code is usually only used for onscreen instructions, as it will be printed.**

1.2.2 Using the field without macro into a form

You simply create a MACROBUTTON field but you assign NOMACRO as the pre-set macro.
Click on the FIELD CODES button at the bottom of the dialog box
Type the text to display either in between quotes or brackets (more common) :


Advanced field properties

Field codes:

MACROBUTTON Nomacro [click here]

MACROBUTTON MacroName DisplayText

Field :

{ MACROBUTTON Nomacro [click here] **}**

Result : [click here]

The user replaces each "variable" in the form by the required data. No need to double-click. Click and type, what you type replaces the code. You may "jump" from code to code by pressing the F11 key (SHIFT + F11 to go reverse).

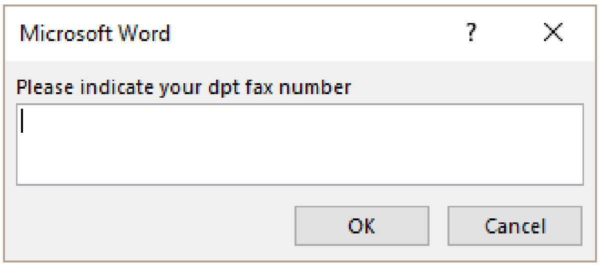
1.2.3 Printing

If the user clicks and types, only the result will be printed. But if not used, the field code will be printed as such (without the shading but like this : Date : [click here]). For a macro to be run : as mentioned, the instruction will be printed.

Advantages and drawbacks	Caution : any unused [click here] will be printed …

1.3 The FILLIN message box

Here is the dialog box that will be displayed for each variable :



Please indicate your dpt fax number

Instructions to the user

Default text (if any)

To generate this box, you need to insert the {FILLIN} field for each variable.
You can use in the main document, into a header/footer or even inside a Text Box located outside your main body text. In this latter case it will simply appear after the others.

1.3.1 The {FILLIN} field and its syntax

{FILLIN "prompt or instructions on the required text" \d "default suggestion"}.

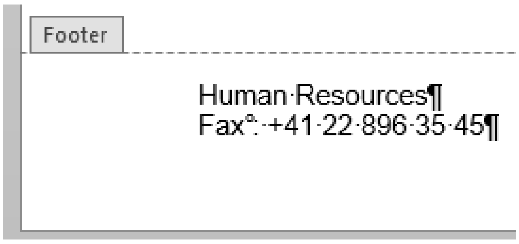
INSERT Tab – TEXT Group – QUICKPARTS Button – FIELD Option
Select the *Fill-in* field and add the prompt message. When you validate, the dialog box is automatically displayed.

Manually : CTRL + F9 and then type the field name. You can type only FILLIN with no other instructions, but the box will be far less interesting to use. When finished, press F9 on the field code to display the message box.

- In both cases it is important to type *some kind of type (even xxx)* so that the field will appear in the document. Otherwise the field is there but invisible and you have to press the SHIFT + F9 combination to display the field code.

When you have placed all the FILLIN codes, make sure you save your file as a template.
Then, each time you create a new document based on this template, the FILLIN boxes appear automatically one after the other. If you do not save the document as a template, you will have to run every message box manually with F9 …

Here is an example of a fill-in code placed into a footer for a fax template. Each department must indicate its own fax number :



Human·Resources¶
Fax°:·+41·22·896·35·45¶

1.3.2 Filling the form

Create a new document based on the template containing the fields.

THE FILLIN BOXES WILL POP UP ONE BY ONE ON THE SCREEN.
Just fill in with the required text.

Advantages	A message box into which free text can be typed (according to the prompt instructions).
Disadvantages	The boxes are displayed one by one, before the body text itself. Consequently, the user cannot relate the data to type with the underlying form. If there are a lot of boxes, users usually find them most irritating. Advice : use with moderation.

1.3.3 Printing

As usual for field codes : only the result is printed. The field shading (grey) is only a screen viewing tool.

2 The concept of field codes

2.1 What is a field code ?

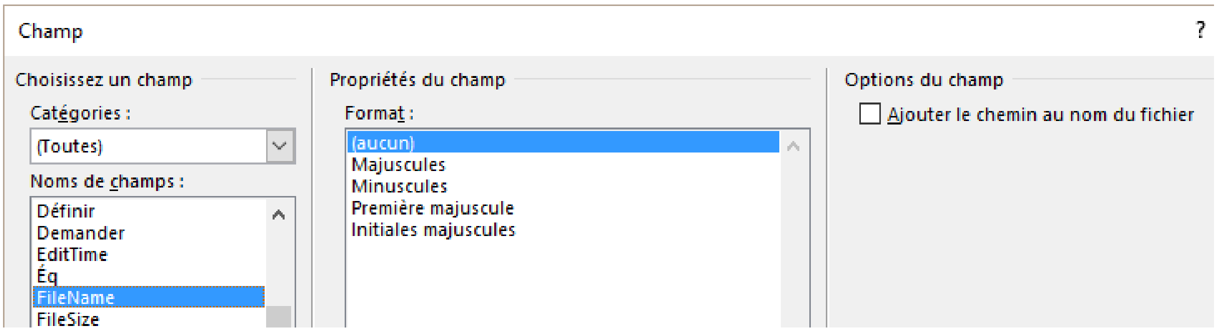
It is an instruction given to Word that will generate a result. Examples :

A field code used to calculate. To create an easy mathematical calculation, display its result and still keep access to the formula.	**{**_=345/1.66 \# "#'##0.00"_**}** = 207.83
Name and path of the current document	**{** FILENAME \p * MERGEFORMAT **}** = D:\Office 2013\Word\WD-2013-English-MailMerge.docx

2.2 How do you get them ?

For some, it is necessary to create them manually. It is the case for the above two codes (previous topic). They have been created through :

- INSERT Tab – TEXT Group – QUICKPART Button – FIELD Option …


Champ
?
Choisissez un champ
Catégories :
(Toutes)
Noms de champs :
Définir
Demander
EditTime
Éq
FileName
FileSize
Propriétés du champ
Format :
(aucun)
Majuscules
Minuscules
Première majuscule
Initiales majuscules
Options du champ
☐ Ajouter le chemin au nom du fichier

But most of the time field codes are inserted in the document simply because the function you are using generates them automatically. It is the case when you insert a table of contents, an index …. and use the mail merge process.

2.3 What is a field code made of ?

{}	Encapsulation (the braces). Caution : these are not characters you can type on the keyboard !
{**DATE**}	The name of the field.
{DATE **\@ "d-MMM-yy"**}	Switch or other indications - here the date format.

2.4 Handy shortcuts for field codes

If necessary : cursor inside the field :

F9	To update the field.
CTRL + A then F9	To select the whole document and update all its fields.
SHIFT + F9	To switch between code and result for a given field.
ALT + F9	To switch between code/result for the whole document codes.
CTRL + SHIFT + F9	To freeze (there is no field anymore, only the result).
F11	To jump from one field to the other and select it (forwards).
SHIFT + F11	To jump from one field to the other and select it (backwards).
CTRL + F11	To lock a field to prevent any change.
CTRL + SHIFT + F11	To unlock a field.
CTRL + F9	To create manually a field : the user must type the name of the instruction and the codes if there are any

Right-clicking the field :

Right click a field and the shortcut menu will display various commands including : *Update, Edit* or *Toggle*.

2.5 Formatting a field

You format the whole code to ensure that the assigned attributes will be kept, even when the field is updated. One exception : a table of contents as the formatting comes from the TC1, TC2 … styles.

2.6 General settings related to field codes

- FILE - OPTIONS – Category :

Display / Printing options	Update fields before printing
Advanced / Show document content	Show field codes instead of their values
	Field shading :
	When selected *Never* *Always*

2.7 Some interesting examples

2.7.1 Date field for templates

INSERT – QUICKPART – FIELD

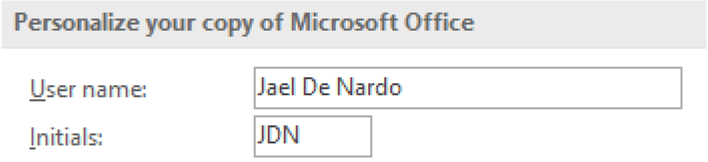
❶ **Date** The date is automatically updated when you open the document. Equivalent to INSERT – DATE AND TIME …

❷ **CreateDate** Most interesting and used with .dotx templates. The field returns the date the file was created. When you create a new document based on this template the field is automatically updated with the current date but then is no longer automatically updated when you open the document.

2.7.2 Fields to automate workstation user details such as the name, the initials, the address or phone number etc …

The information to retrieve come from : FILE – OPTIONS

❶ *GENERAL category*

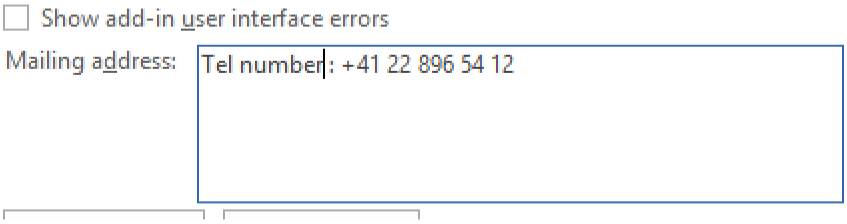


Personalize your copy of Microsoft Office

User name: Jael De Nardo

Initials: JDN

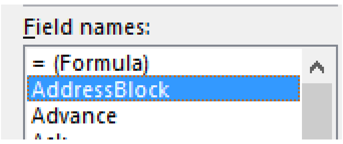
❷ *ADVANCED category – at the bottom*



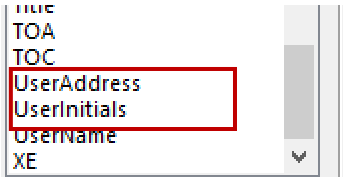
☐ Show add-in user interface errors

Mailing address: Tel number: +41 22 896 54 12

The fields that will retrieve the information : INSERT – QUICKPARTS – FIELD –


Field names:
= (Formula)
AddressBlock
Advance

info from number ❷


Title
TOA
TOC
UserAddress
UserInitials
UserName
XE

info from number ❶

3 Introduction to macro-instructions

You can automate some of your work using macro-instructions. A *macro* is a series of commands and other instructions that you can *run* to perform a given task. It can be a good idea to replace repetitive actions with macros

3.1 Accessing the commands related to macros

❶ DEVELOPER Tab : It is the Tab containing commands for so-called « super-user ». The commands include macros and macro security, form controls and XML tools.

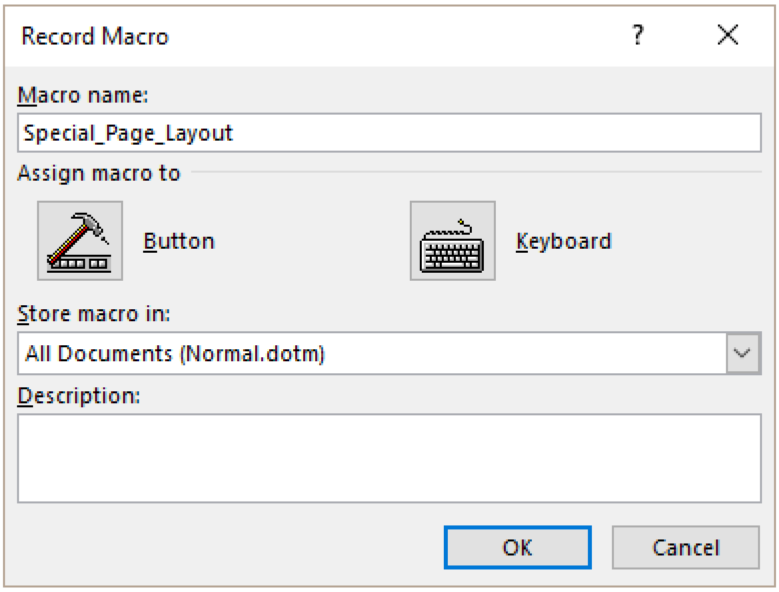
How to display the tab : FILE – OPTIONS - CUSTOMIZE RIBBON Category – Tick on the tab in the list (on the right).

❷ VIEW Tab – MACROS Group – MACROS Button

3.2 Recording a macro

The macro recorder will record your commands in sequence and convert them into the VBA language (VBA =Visual Basic Edition Applications).

- DEVELOPER Tab – CODE Group – RECORD MACRO Button



Macro name: Special_Page_Layout

Store macro in: All Documents (Normal.dotm)

Description:

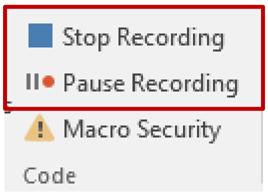
Macro name	The name cannot include a space or a dash Do not give an existing name such as FileClose because your macro could be in conflict with one Word native function	
Button	To add a button to the Quick Access toolbar *(see topic on page 51)*	
Keyboard	To assign a keyboard shortcut key to the macro *(see topic on page 51)*	
Store macro in	Macros can be stored in :	The global NORMAL.DOTM template A specific XXX.DOTM template A specific standard XXX.DOCM file

- OK to confirm
- Perform the commands to be turned into a macro.

When you save a macro, **text operations performed with the mouse are not recorded.** You must revert to the keyboard for actions such as *moving the cursor or selecting text.* On the other hand no problem to select an option from a drop-down menu or into a dialog box or to click a button on the Ribbon.

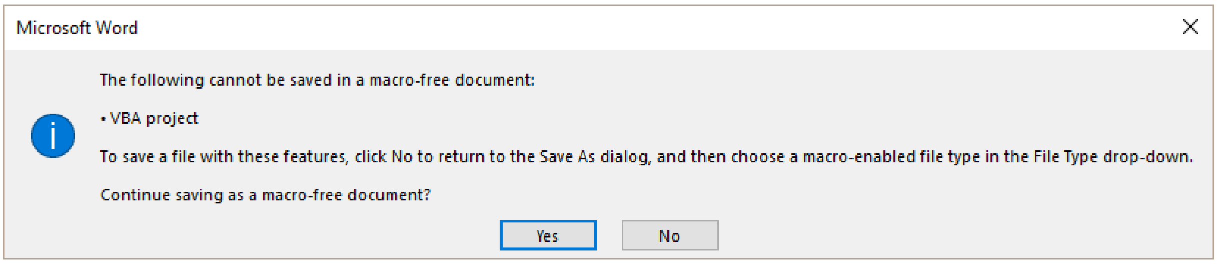
Pause Recording : momentarily stop the recording to perform an action that should not be recorded.

When you have finished : click on STOP RECORDING



3.3 Saving the file containing the macro

Impossible to assign a "normal" extension such as (.docx). You must save the file using the *Macro-Enabled* format, that is the *docm* or *.dotm* extension. If you try to force saving the file with the .docx extension, the following message will be displayed :


Microsoft Word

The following cannot be saved in a macro-free document:

• VBA project

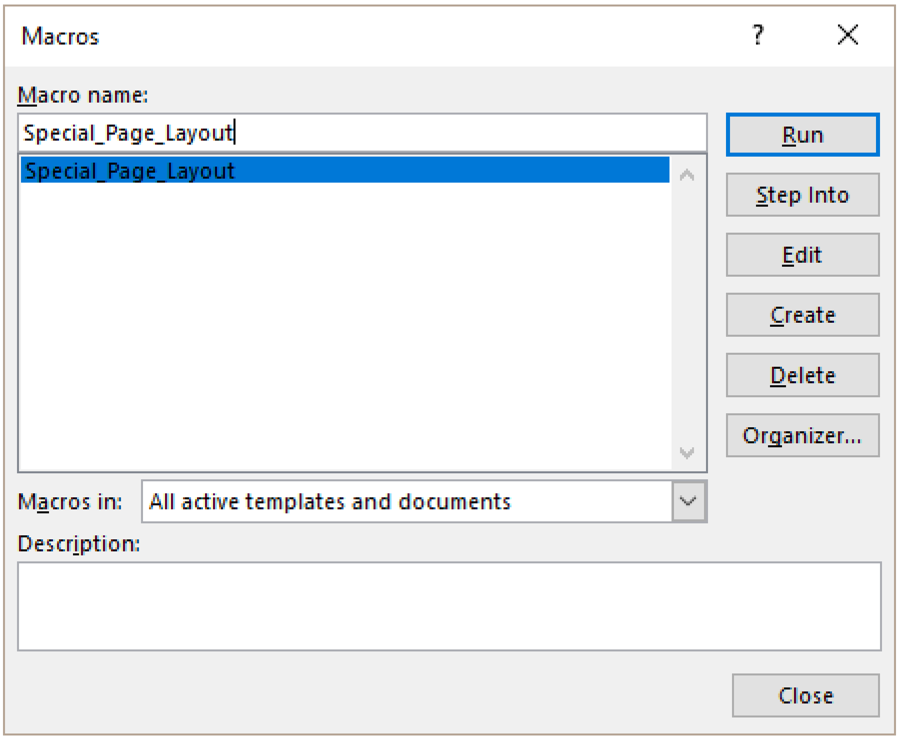
To save a file with these features, click No to return to the Save As dialog, and then choose a macro-enabled file type in the File Type drop-down.

Continue saving as a macro-free document?

NO : back to the document and this time save correctly (.docm or .dotm)
YES . the file will have the .docx extension. Provided you do not close the workbook, you will still see the macros. But when the file is closed and opened again : no more macros.

3.4 Managing macros : run, delete etc...

- DEVELOPER Tab – CODE Group – MACROS Button


Macros

Macro name: Special_Page_Layout

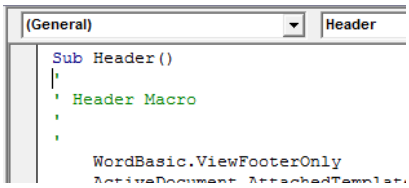
Macros in: All active templates and documents

Description:

Run	To run or *execute* the macro *Note :* if you have set a button or a keyboard shortcut, they can also be used to run the macro
Step Into	Running the VBA editor. Select the command one by one by pressing the F8 key. *Good knowledge of the VBA language required*

Edit	Running the VBA editor to edit the selected macro Any user can make simple modifications but for the rest …. A good knowledge of the VBA language is required.
Create	Running the VBA editor to create a macro, line by line. *Good knowledge of the VBA language required*
Delete	To delete the selected macro *Reminder : if the macro is stored in Normal.dotm, deletion will be final only when you exit Word.*
Organizer	The dialog box to import/export styles. To manage a *Macros Project de macros (all the macros of a file).* To copy into another document/template, to delete … To copy ONE macro : VBA

✐ There is no RENAME command. To rename a macro, you need to run the VBA editor (use the EDIT button for instance) and rename directly in the code.

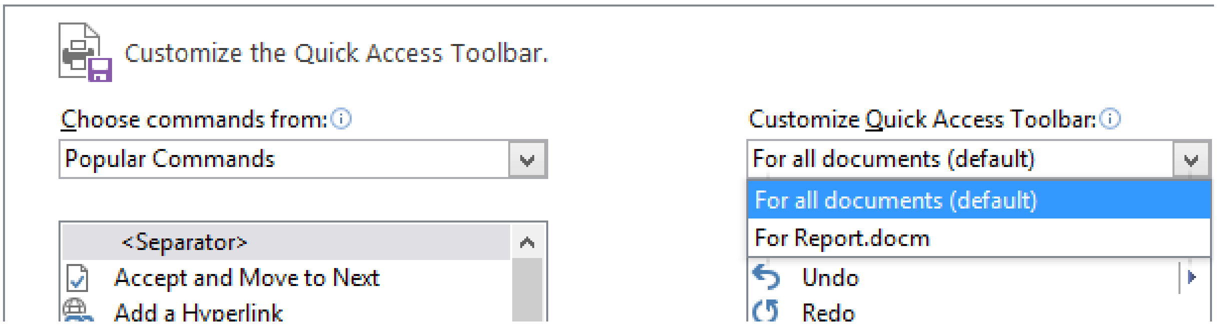


```
Sub Header()
'
' Header Macro
'
'
    WordBasic.ViewFooterOnly
    ActiveDocument.AttachedTemplat
```

3.5 Custom button for a macro

Usually the button should only be displayed in the document containing the macro

Simply set so in the Quick Access customize dialog box (right click a button on the Ribbon and option CUSTOMIZE ….)



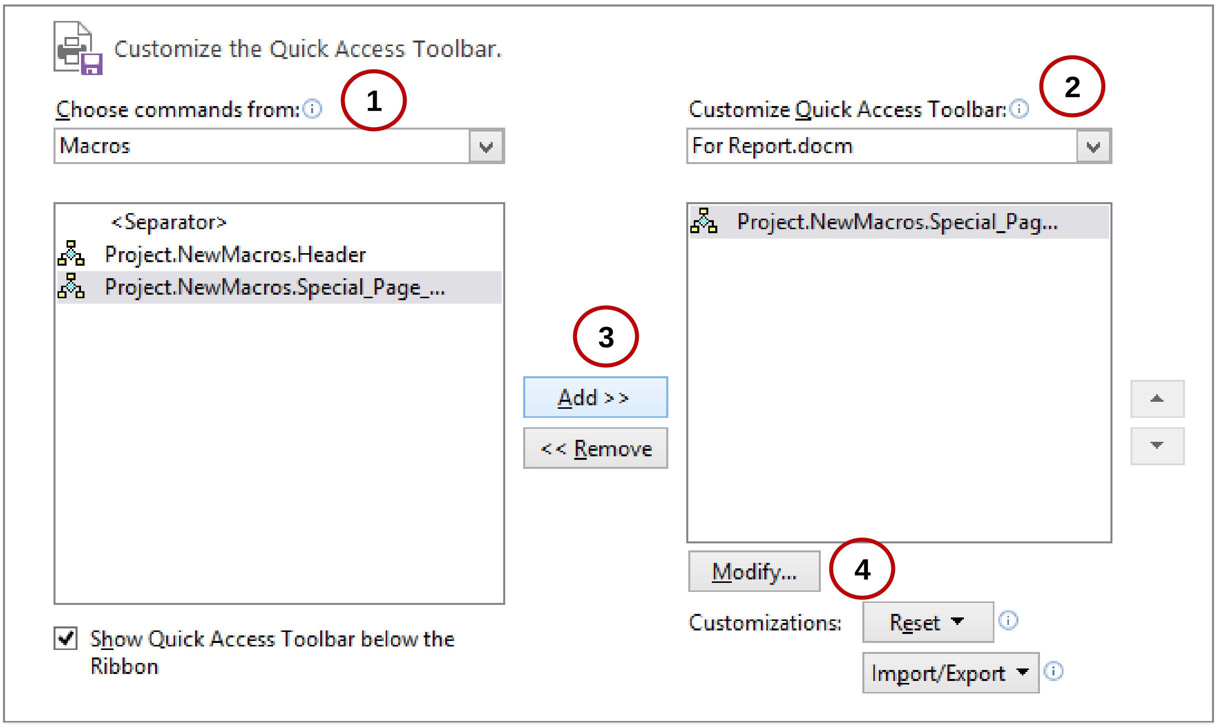
Customize the Quick Access Toolbar.

Choose commands from: Popular Commands

Customize Quick Access Toolbar: For all documents (default)

Once you selected set the document or the template, the commands will be added only to THIS document/template. The buttons will be displayed at the toolbar right end.

Creating the button


Customize the Quick Access Toolbar.
1
2
3
4
<Separator>
Project.NewMacros.Header
Project.NewMacros.Special_Page_...
Project.NewMacros.Special_Pag...
Add >>
<< Remove
Modify...
Customizations:
Reset
Import/Export

Choose commands from: Macros

Customize Quick Access Toolbar: For Report.docm

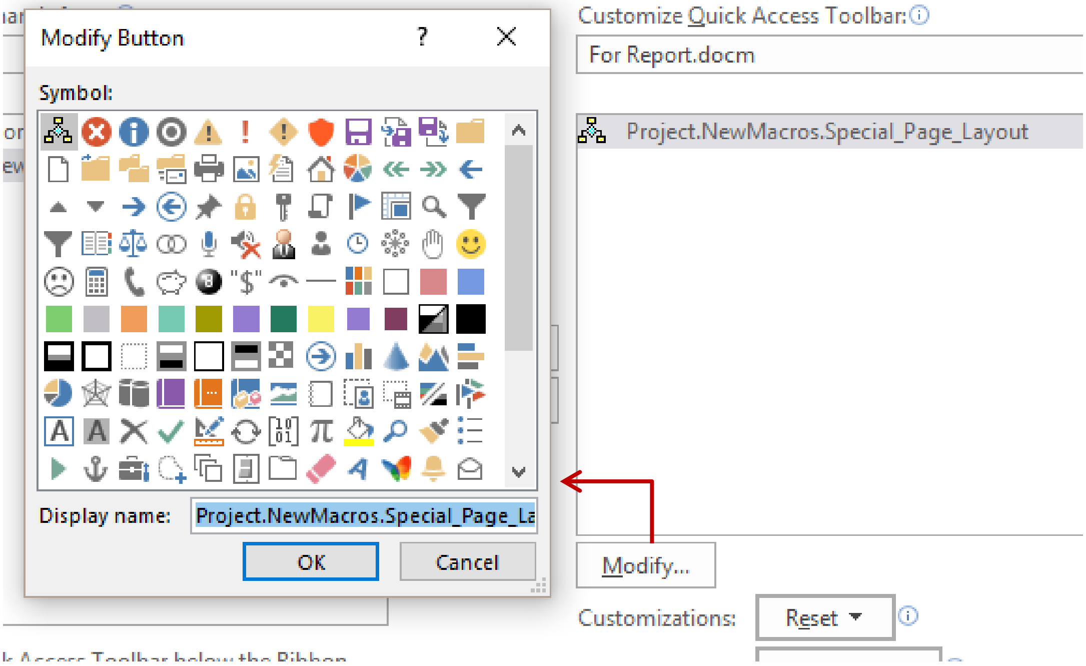
☑ Show Quick Access Toolbar below the Ribbon

❶ Select the *macros* category in the drop-down list

❷ Select the required document or template

❸ Select the required macro and click on the ADD button.

❹ Select the shortcut for this macro and click on the MODIFY button that will be now available. :


Modify Button
?
Symbol:
"$"
OK
Cancel
Project.NewMacros.Special_Page_Layout
Modify...
Customizations:
Reset

Customize Quick Access Toolbar: For Report.docm

Display name: Project.NewMacros.Special_Page_La

Symbol	Choose from the gallery. Please note that the button cannot be edited and modified. Nor can you create your own buttons.
Name	Modify the name as required

💣 Make sure to set a macro button for a specific document (standard or template). Or the button will be permanently displayed on the toolbar, whatever the active document.

Note : when you add a macro button for a specific document, the toolbar displays :

the usual buttons + the macro buttons
(even though the right pane in the Customize dialog box gets emptied)

3.6 Creating a new document : will the macros be copied ?

If you create a new document based onto a .docm : the macro is copied into the new document and a Warning Message about enabling macros will be displayed. Make sure to save the file as a .docm file if you do not want to lose it.

If you create a new document based onto a .dotm file : the macro is not copied into the new document but it can be run with no problem. Why and how ? The new document has a linked *reference* to the source template and its macros (running is enabled but not editing). This comes from the fact that the source template is *attached* to the new document (check through DEVELOPER Tab – TEMPLATES Group – DOCUMENT TEMPLATE Button). If the source macro is modified later on, all documents created on the source template will run up-to-date macros.

3.7 Macros and security

Protecting files has been nicely enhanced in the 2010 release. This includes macros.
See next chapter.

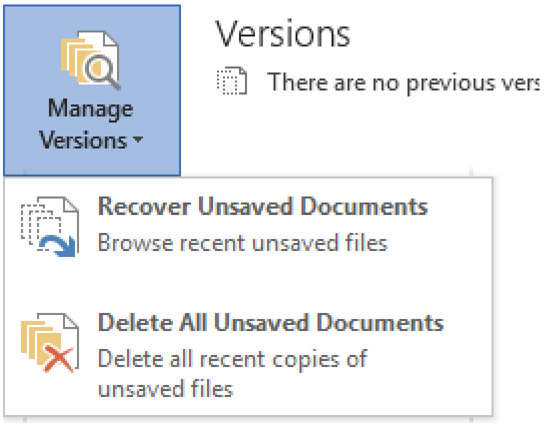
PROTECTING

1 Security of Office files

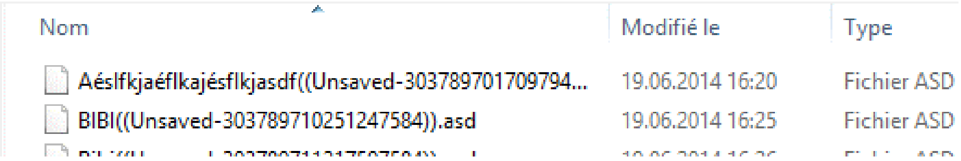
1.1 Unsaved files

New files that you have worked a minimum of 10 minutes and closed without saving are memorized in the computer during **4 days**.

- FILE - INFO


Manage Versions
Versions
There are no previous vers
Recover Unsaved Documents
Browse recent unsaved files
Delete All Unsaved Documents
Delete all recent copies of unsaved files

✐ The DELETE command is displayed only from a new blank document.



Nom	Modifié le	Type
Aéslfkjaéflkajésflkjasdf((Unsaved-303789701709794...	19.06.2014 16:20	Fichier ASD
BIBI((Unsaved-303789710251247584)).asd	19.06.2014 16:25	Fichier ASD

Double-click on one file and it is opened in Word …

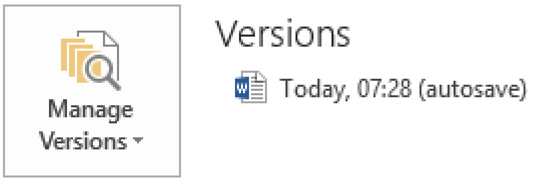
1.2 Background security saving

As you may know, Word, Excel or PowerPoint, save your work every 10 minutes (or according to what you may have set). Temporary files are created, that will be closed when you save and close the active document. In case of a breakdown those files are not closed and are used as recovery files when you re-run the crashed program. Office 2016 does not change this but it now gives you access to those security files

Example in Word :

I have been working the present document for less than one hour. One security file (*version*) has been automatically created :

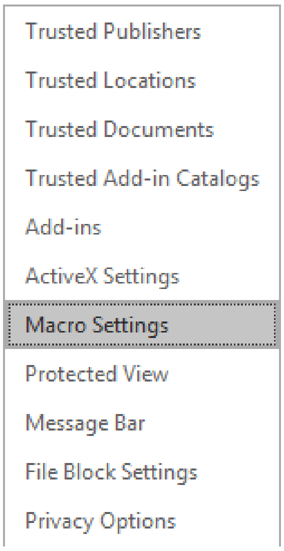
I can check this in FILE – INFO :


Manage Versions
Versions
Today, 07:28 (autosave)

The versions will be automatically closed when I will save *and close* the current document. In the meantime I can open any one of them and do what I want with the file.

1.3 Security settings

- FILE – OPTIONS – TRUST CENTER – TRUST CENTER SETTINGS Button


Trusted Publishers
Trusted Locations
Trusted Documents
Trusted Add-in Catalogs
Add-ins
ActiveX Settings
Macro Settings
Protected View
Message Bar
File Block Settings
Privacy Options

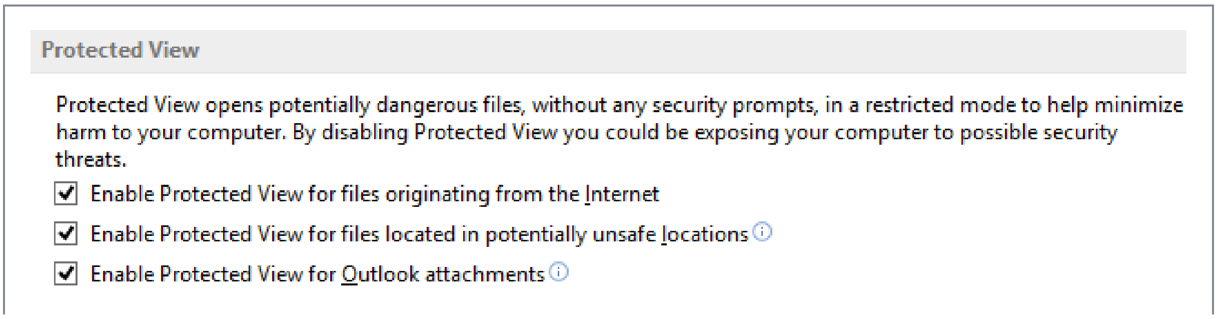
Two levels in terms of security

- *Protected View* : protection against editing

  then

- *Macros or other active content* : anti-virus protection

1.3.1 *PROTECTED VIEW for files opened from Outlook or from the Internet*

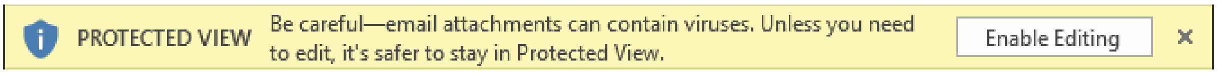


Protected View

Protected View opens potentially dangerous files, without any security prompts, in a restricted mode to help minimize harm to your computer. By disabling Protected View you could be exposing your computer to possible security threats.

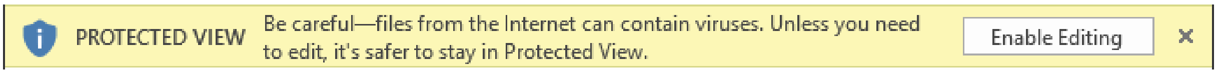
☑ Enable Protected View for files originating from the Internet
☑ Enable Protected View for files located in potentially unsafe locations ⓘ
☑ Enable Protected View for Outlook attachments ⓘ

The file is momentarily « blocked », you cannot edit and modify. Here below the warning message that is displayed below the Ribbon :



PROTECTED VIEW Be careful—email attachments can contain viruses. Unless you need to edit, it's safer to stay in Protected View.

Enable Editing
×



PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View.

Enable Editing
×

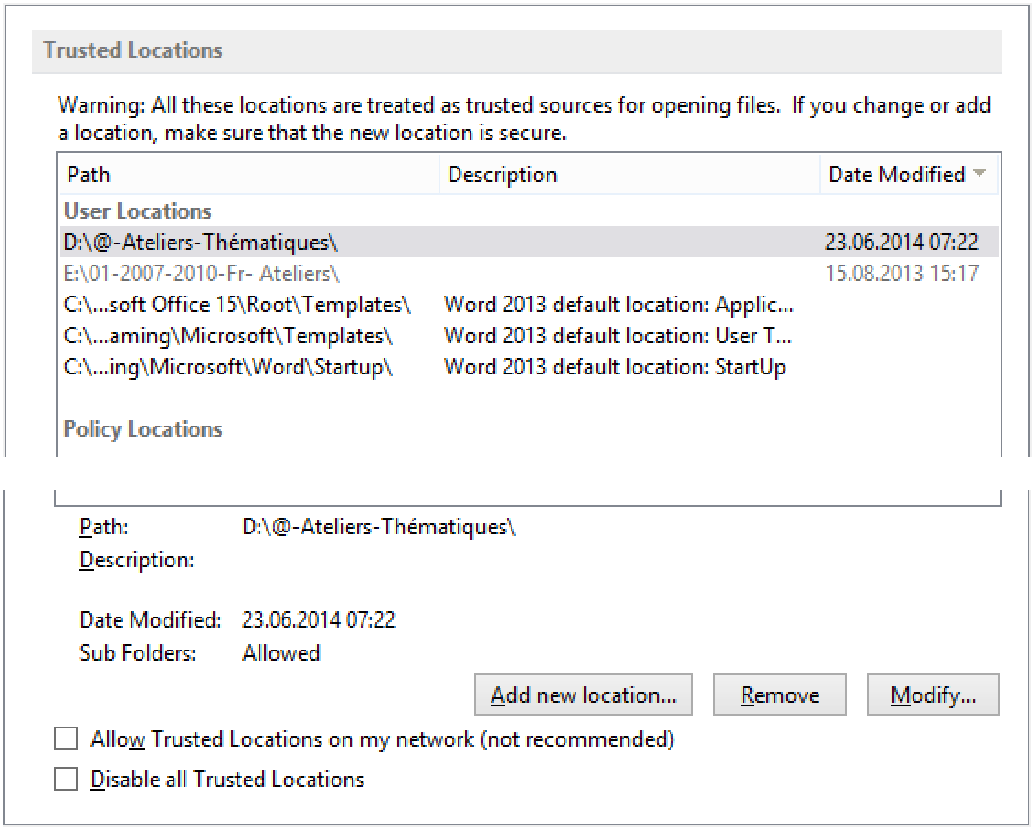
1.3.2 *Anti-virus protection for files containing active code (macros, ActiveX …)*

The philosophy uses the notion of « Trusted » locations, documents etc …

Trusted Publishers
Macros are signed

Trusted Locations

Trusted folders. The macros and other active content are automatically enabled.
The startup and the templates folders are automatically set as trusted locations (by default)



Trusted Locations

Warning: All these locations are treated as trusted sources for opening files. If you change or add a location, make sure that the new location is secure.

Path	Description	Date Modified
User Locations		
D:\@-Ateliers-Thématiques\		23.06.2014 07:22
E:\01-2007-2010-Fr- Ateliers\		15.08.2013 15:17
C:\...soft Office 15\Root\Templates\	Word 2013 default location: Applic...	
C:\...aming\Microsoft\Templates\	Word 2013 default location: User T...	
C:\...ing\Microsoft\Word\Startup\	Word 2013 default location: StartUp	
Policy Locations		

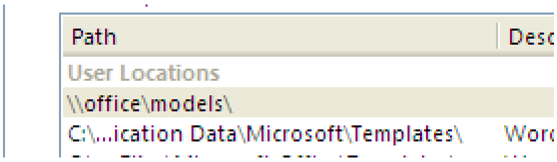
Path: D:\@-Ateliers-Thématiques\
Description:
Date Modified: 23.06.2014 07:22
Sub Folders: Allowed

☐ Allow Trusted Locations on my network (not recommended)
☐ Disable all Trusted Locations

ADD NEW LOCATION : to add a custom folder (and its sub-folders). 💣it is dangerous – although technically possible – to add a full drive (such as D:/ - P:/.)
Locations are set by program and not for all Office programs

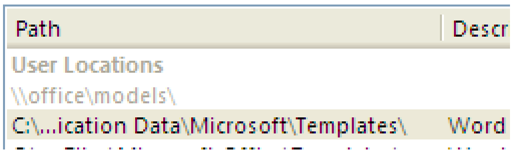
ALLOW TRUSTED LOCATION ON MY NETWORK
Turn on this option to be able to add a network drive as a trusted location. If you have added network folders and turn this option off, the network lines turn greyed out.

On



Path	Desc
User Locations	
\\office\models\	
C:\...ication Data\Microsoft\Templates\	Wor

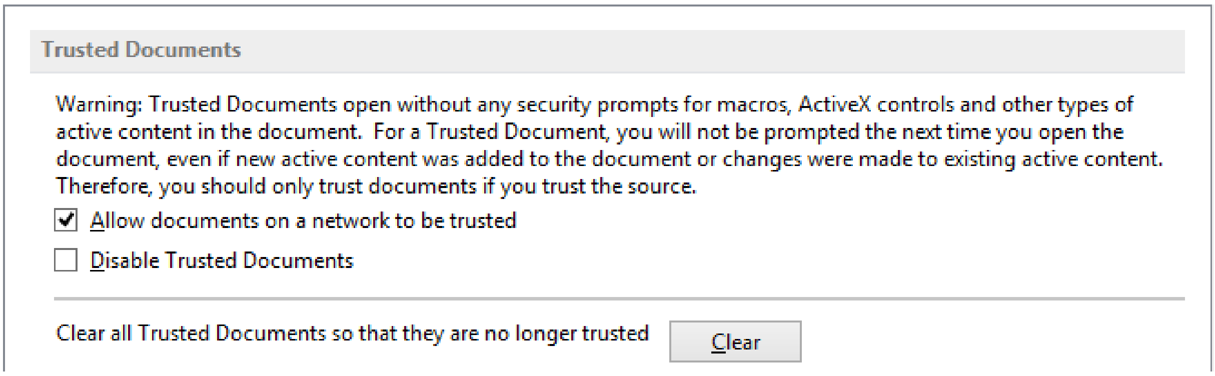
Off



Path	Descr
User Locations	
\\office\models\	
C:\...ication Data\Microsoft\Templates\	Word

DISABLE ALL TRUSTED LOCATIONS
To momentarily turn off all trusted locations

Trusted documents



Trusted Documents

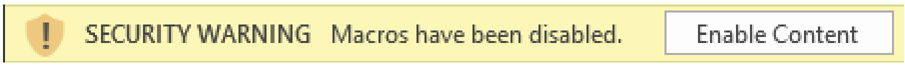
Warning: Trusted Documents open without any security prompts for macros, ActiveX controls and other types of active content in the document. For a Trusted Document, you will not be prompted the next time you open the document, even if new active content was added to the document or changes were made to existing active content. Therefore, you should only trust documents if you trust the source.

☑ Allow documents on a network to be trusted

☐ Disable Trusted Documents

Clear all Trusted Documents so that they are no longer trusted

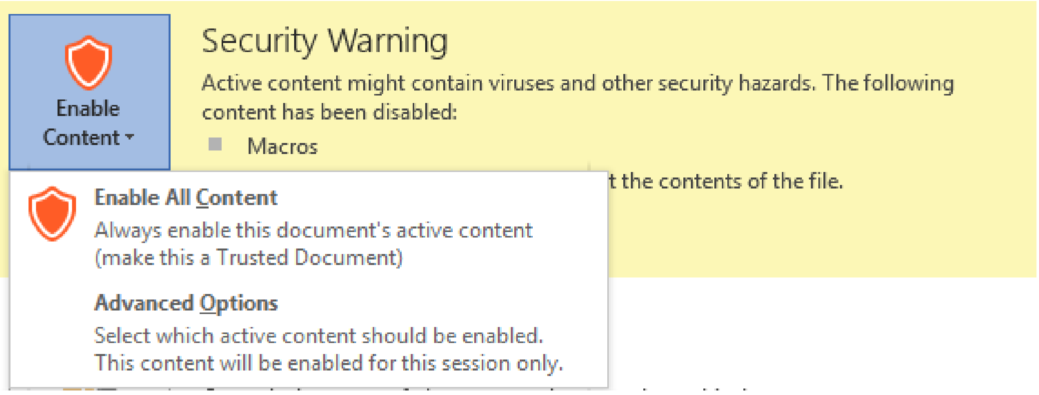
When you open a file containing programming code, the following warning message will be displayed below the Ribbon :



SECURITY WARNING Macros have been disabled.

ENABLE CONTENT : **the file is considered as a *trusted document* and the next time it is opened there will be no warning message**. This file will cease to be trusted only if you *move it, open it from another workstation or if you restore all trusted documents into standards documents.*

- FILE – INFO



Security Warning

Active content might contain viruses and other security hazards. The following content has been disabled:

- Macros

t the contents of the file.

Enable All Content
Always enable this document's active content (make this a Trusted Document)

Advanced Options
Select which active content should be enabled. This content will be enabled for this session only.

You can choose between a permanent activation (first option) or only for the active session (second option).

ActiveX, Macro … Settings
By default, macros and ActiveX are disabled with a notification

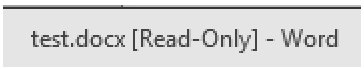
Message Bar
Should the warning bar be displayed or not ?

2 Protecting the access to a document

2.1 The read-only attribute (Windows Explorer)

- Run the Explorer and open the required folder
- Right click on the file in question and choose PROPERTIES

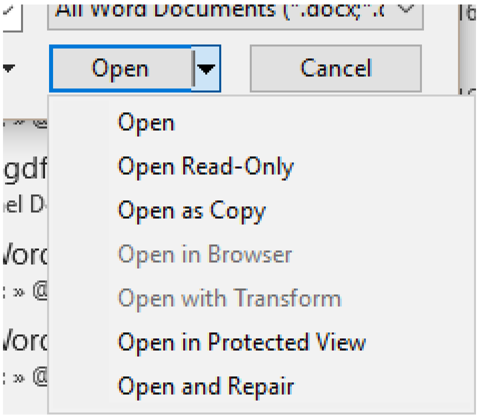
Result : when you open the document (double-click on the Explorer or in Word) : the READ ONLY indication will be added at the top in the title bar :


test.docx [Read-Only] - Word

If you try to save the file after having made modifications, a message box will warn you that the file is in Read-only mode and will force you to save it under a new name (or cancel the changes). But this protection is extremely light : anyone can change the file attribute

2.2 Choosing manually to Open as Copy or Read-Only

- FILE – OPEN – Select the required document and display the drop-down list of the OPEN button :

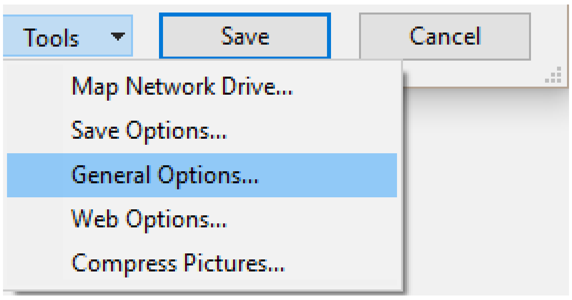

All Word Documents (*.docx;*.d
Open
Cancel
Open
Open Read-Only
Open as Copy
Open in Browser
Open with Transform
Open in Protected View
Open and Repair

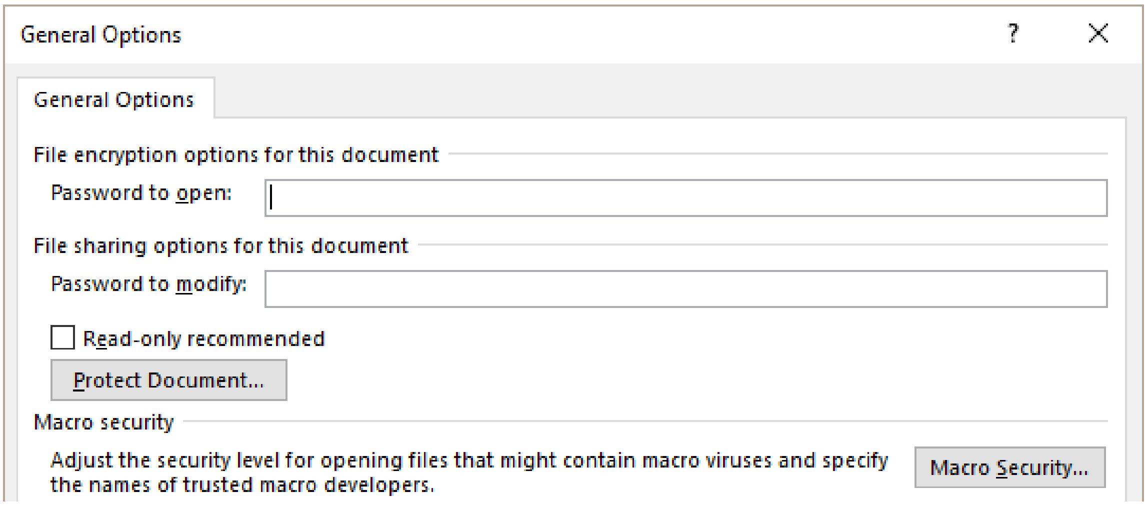
Open Read-Only	The ***[Read Only]*** indication appears at the top in the title bar
Open as Copy	A copy of the document is automatically created in the same folder. It is named ***Copy (1) of XXX.doc*** and it is opened. You may rename the file later on.

2.3 Protection to open or modify

When you save the document, you may set a password to control whether it can be opened and/or modified.

- Click on the TOOLS button located at the bottom of the save dialog box


Tools
Save
Cancel
Map Network Drive...
Save Options...
General Options...
Web Options...
Compress Pictures...



General Options

General Options

File encryption options for this document

Password to open:

File sharing options for this document

Password to modify:

☐ Read-only recommended

Protect Document...

Macro security

Adjust the security level for opening files that might contain macro viruses and specify the names of trusted macro developers.

Macro Security...

Password to open	Only the person who knows the password can open the document.
Password to modify	With the password, you can open the document and modify. If you do not know the password you can open the document in read-only mode. You will be allowed to read and modify but you will have to save the file though a classical FILE – SAVE AS command to save your modifications.
Read-only recommended	It is a suggestion only, with no password. The source document can be opened.
PROTECT DOCUMENT Button	*The pane to manage the internal protection is displayed (see next topic)*
MACRO SECURITY Button	*The Word options related to macros are displayed.*

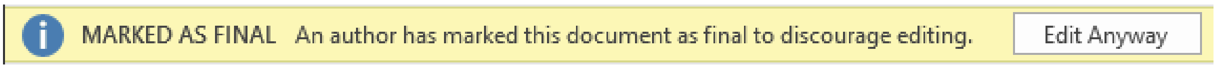
Caution : there are lots of programs (free or cheap) able to "crack" a password-protected file.

2.4 The Mark as Final command

The document can be opened but all *editing options* are disabled. It works like a « forced » read-only mode.

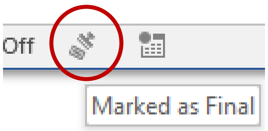
- **FILE INFO – PROTECT DOCUMENT Button – MARK AS FINAL**
- Word first needs to save the file. Accept
- A dialog box warns you that all editing options will be disabled

When the file is opened, the message bar displays the following warning message :



MARKED AS FINAL An author has marked this document as final to discourage editing. Edit Anyway

The following icon is also displayed in the status bar :

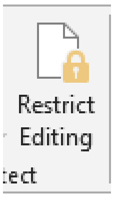


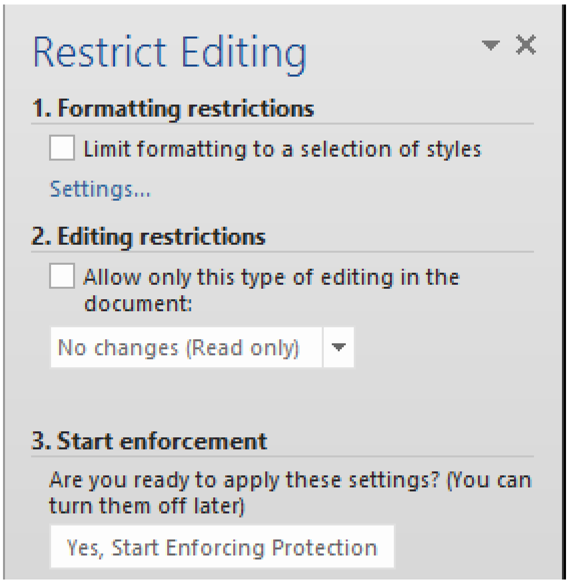
Conclusion : this is not a *security* option …

3 Internal protection

- DEVELOPER Tab – PROTÉCT Group *Or* REVIEW Tab – PROTECT Group

The button is the same for both commands :





Restrict Editing

1. Formatting restrictions

☐ Limit formatting to a selection of styles

Settings...

2. Editing restrictions

☐ Allow only this type of editing in the document:

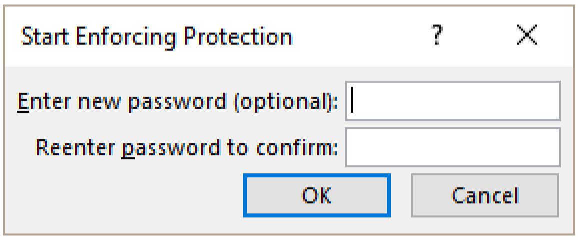
No changes (Read only)

3. Start enforcement

Are you ready to apply these settings? (You can turn them off later)

Choose the required type of protection and then validate by clicking on the YES, START ENFORCING PROTECTION button.

You are prompted to set a password – but this is not compulsory

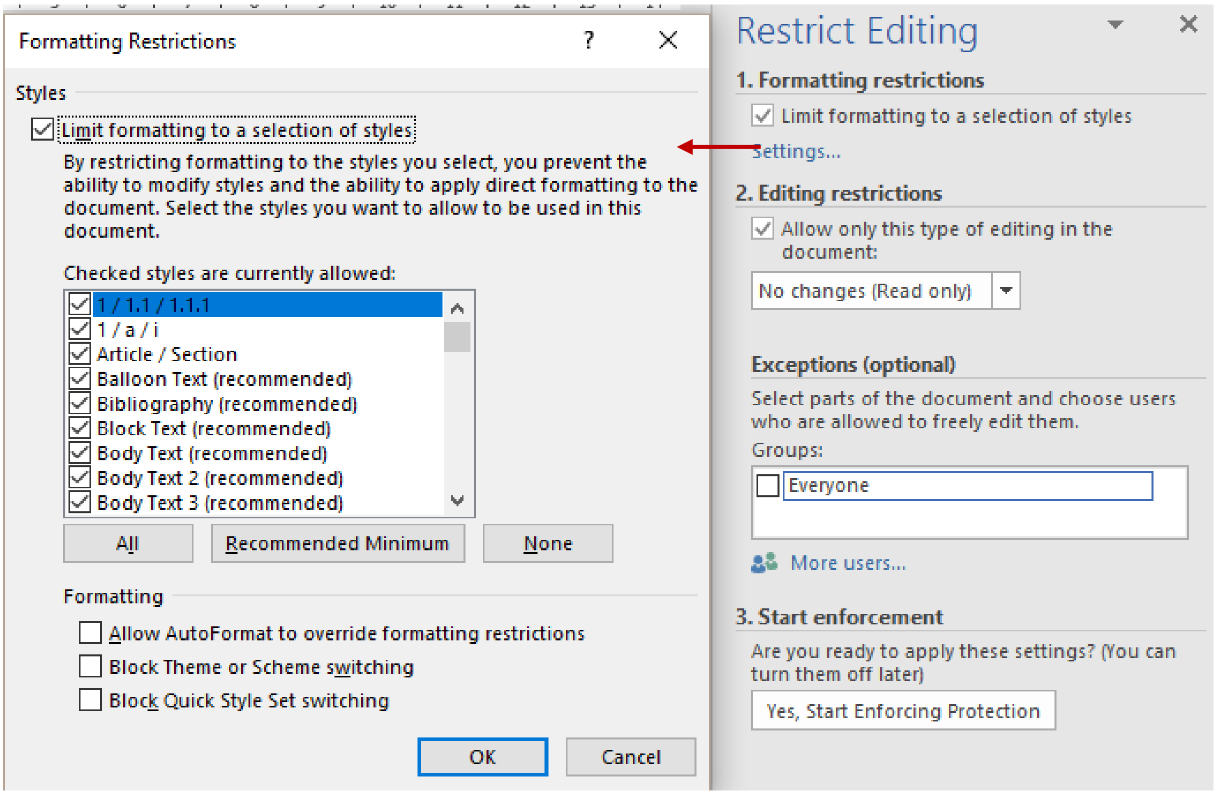


Start Enforcing Protection

Enter new password (optional):

Reenter password to confirm:

3.1 Formatting restrictions



Formatting Restrictions

Styles

☑ Limit formatting to a selection of styles

By restricting formatting to the styles you select, you prevent the ability to modify styles and the ability to apply direct formatting to the document. Select the styles you want to allow to be used in this document.

Checked styles are currently allowed:

☑ 1 / 1.1 / 1.1.1
☑ 1 / a / i
☑ Article / Section
☑ Balloon Text (recommended)
☑ Bibliography (recommended)
☑ Block Text (recommended)
☑ Body Text (recommended)
☑ Body Text 2 (recommended)
☑ Body Text 3 (recommended)

Formatting

☐ Allow AutoFormat to override formatting restrictions
☐ Block Theme or Scheme switching
☐ Block Quick Style Set switching

Restrict Editing

1. Formatting restrictions

☑ Limit formatting to a selection of styles

Settings...

2. Editing restrictions

☑ Allow only this type of editing in the document:

No changes (Read only)

Exceptions (optional)

Select parts of the document and choose users who are allowed to freely edit them.

Groups:

☐ Everyone

More users...

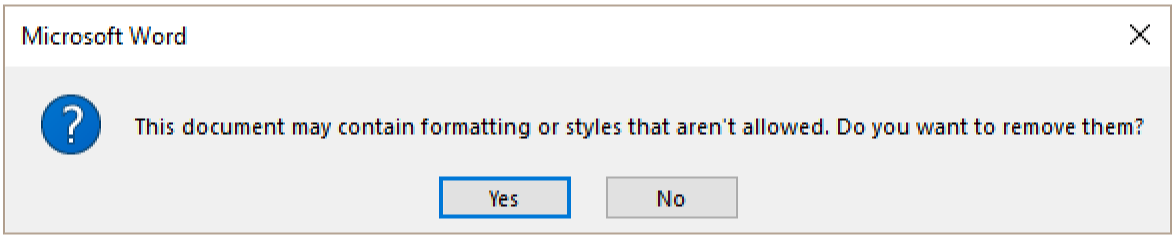
3. Start enforcement

Are you ready to apply these settings? (You can turn them off later)

Select the styles that the user is allowed to **apply.** (caution : not *modify*. Modifying is not possible with formatting restrictions and is therefore not allowed at all).

Also set whether you wish to block themes or access to the Quick Styles Sets.

When you validate, here below the dialog box that will be displayed :


Microsoft Word
Yes
No

This document may contain formatting or styles that aren't allowed. Do you want to remove them?

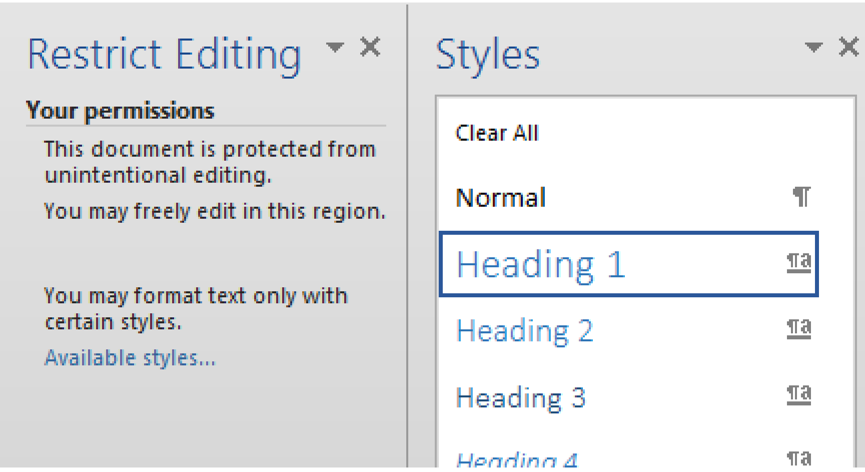
YES : 💣 the styles used in your document are removed and the NORMAL style is applied to all paragraphs.

NO the styles used in the document are kept

Example : all the styles have been disabled except the Heading 1 to 9 styles.

Here below the available styles after having enforced the protection :

* The list style show the allowed styles already used in the document


Restrict Editing
Styles
Clear All
Normal
Heading 1
Heading 2
Heading 3
Heading 4

Your permissions

This document is protected from unintentional editing.

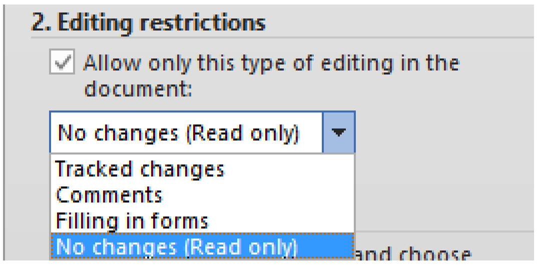
You may freely edit in this region.

You may format text only with certain styles.

Available styles...

Except for the Normal and Heading styles, all other styles are missing.
Moreover, this restriction implies that you cannot modify the available styles. Worse, you can **no longer apply text or paragraph attributes**. On the other hand, deleting, inserting text is still possible.

3.2 Editing restrictions


Tracked changes
Comments
Filling in forms
No changes (Read only)
and choose

2. Editing restrictions

☑ Allow only this type of editing in the document:

No changes (Read only)

Track changes

Linked to the *Track Changes* functionality and explained in a specific chapter

Comments

The document looks "frozen" : only a few *reviewing* commands (REVIEW Tab) are available (some language tools, comments, navigation)

Filling in forms

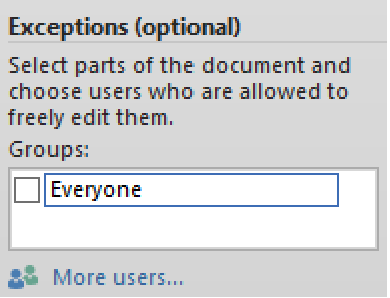
See chapter on forms

✏ It is interesting to note that it is possible to *use form protection when there are no form controls in the document*. This works fine. An example : start the document with a continuous section break. This creates 2 sections. The first one will contain the header/footer and the second one the document body text. Only the first section will be locked when protection is on which will prevent users from modifying the header/footer. This is often used to set a watermark that no one can move, change … *But there is a price to pay : you can assign bullets/numbers to a paragraph but can no longer define a new bullet/number, some global page setup commands are no longer available …*

No changes

The option is clear enough : no available command. But selection and copy-paste into a another document is still possible.

As this mode is very rigid, it is possible to set EXCEPTIONS :



Exceptions (optional)

Select parts of the document and choose users who are allowed to freely edit them.

Groups:

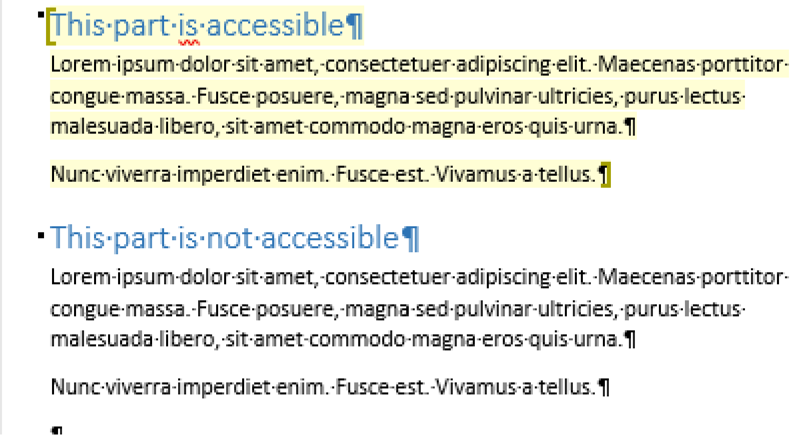
☐ Everyone

More users...

As explained, select one or more portion(s) of text (for more than one use the CTRL key) and there will be two possibilities : EVERYONE or a list of set users.

Here after an example with a few paragraphs. The first ones are left free to be modified (EVERYONE). The paragraphs of the section part are not at all editable.

Editable paragraphs are displayed with a yellow colored highlighting and between brackets.



[This·part·is·accessible¶

Lorem·ipsum·dolor·sit·amet,·consectetuer·adipiscing·elit.·Maecenas·porttitor·congue·massa.·Fusce·posuere,·magna·sed·pulvinar·ultricies,·purus·lectus·malesuada·libero,·sit·amet·commodo·magna·eros·quis·urna.¶

Nunc·viverra·imperdiet·enim.·Fusce·est.·Vivamus·a·tellus.¶]

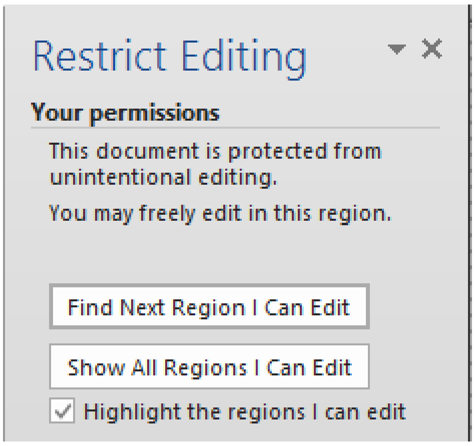
This·part·is·not·accessible¶

Lorem·ipsum·dolor·sit·amet,·consectetuer·adipiscing·elit.·Maecenas·porttitor·congue·massa.·Fusce·posuere,·magna·sed·pulvinar·ultricies,·purus·lectus·malesuada·libero,·sit·amet·commodo·magna·eros·quis·urna.¶

Nunc·viverra·imperdiet·enim.·Fusce·est.·Vivamus·a·tellus.¶

¶

When the document is in active protection, the Office Pane displays the following options :



Restrict Editing

Your permissions

This document is protected from unintentional editing.

You may freely edit in this region.

Find Next Region I Can Edit
Show All Regions I Can Edit
☑ Highlight the regions I can edit

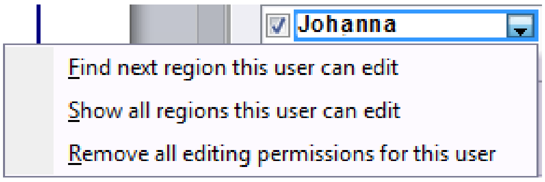
Find Next Region I Can Edit
Click and the next free portion of text will be selected.

Show All Regions I Can Edit
All free portions are selected

Highlight the regions I can edit
This option can be turned off but it is important to mention that it will be automatically on the next time you open the document. It cannot be kept « off ».

Basic commands such as text and paragraph attributes, inserting and modifying a table … are available.

If the document is shared : click on the triangle located at the right of one given user :



☑ Johanna
Find next region this user can edit
Show all regions this user can edit
Remove all editing permissions for this user

Reverting back to original status

Clicking on the STOP PROTECTION button does not remove the editable portions. They will remain with a grey shading, between brackets, even though the protection itself has been removed. They remain "ready" for any future re-activation. If you need to remove these editable portions, select all of them again and check off the EVERYONE case or delete the list of users.