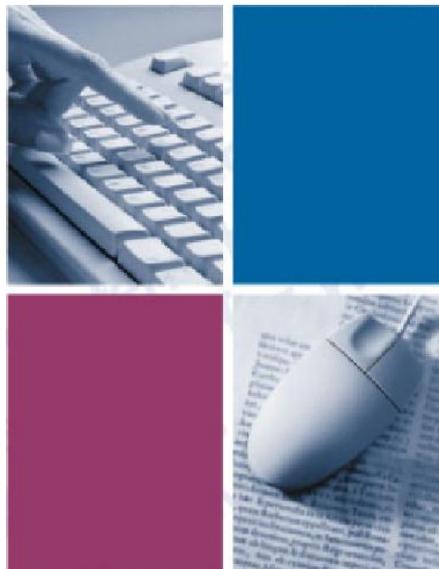


ISBN 978-1-921780-76-9

**DESIGN AND DEVELOP COMPLEX  
TEXT DOCUMENTS**  
(WORD 2010)

**BSBITU401A**



*by*

*The Software Publications Writing Team*



**Software Publications**

## **Design and Develop Complex Text Documents** (Word 2010)

This book supports BSBITU401A Design and develop complex text documents in the Business Services Training Package.

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The Software Publications Writing Team

**ISBN 978-1-921780-76-9**

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[www.SoftwarePublications.com.au](http://www.SoftwarePublications.com.au)

**Published and printed in Australia**

Section

# 4

## Templates, Styles, Headers and Footers Sections, Forms

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### Learning Outcomes

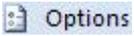
*At the end of this section you should be able to -*

- Create, edit and use a template
- Create, edit and use an automated template
- Create basic forms using the Forms feature
- Create, edit and apply styles to a document
- Create and use a template with styles
- Copy styles from one document to another
- Create and edit alternating headers and footers
- Insert different headers/footers in different sections

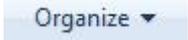
# Templates

Every document that is created in Word 2010 has a template attached to it. When you create a new blank document the default template called **Normal** is attached to your document. This contains the AutoText entries you have created, macros, and default changes you have made such as margins and the default font.

Word 2010 has a number of templates which have styles and powerful in-built macros that prompt for information. Word templates can be modified to suit your own particular requirements if desired or new templates can be created for documents that are used frequently, e.g. minutes of meetings, balance sheets, memos and fax forms.

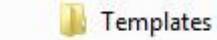
To see where *documents* and *templates* are located on your system click on  then click on . Select the Advanced option from the left hand list and scroll down to the General section. Click on . There you will see that two types of templates are listed, User templates and Workgroup templates.

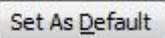
Templates you *create* will be saved in the User templates folder. A copy of the default template **Normal** should be listed in the User templates folder. Workgroup templates are templates that are shared across a team or organisation. Their location, usually on a shared server, must be set up for each user's computer.

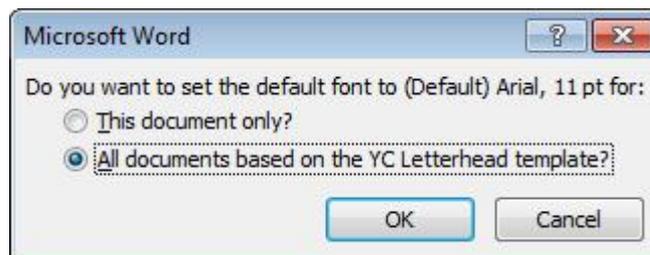
The location of the User templates folder may vary depending on the setup of your computer. For this book we have assumed that a Windows 7 computer with user profiles is used. In this case the location would be C:\Users\username\AppData\Roaming\Microsoft\Templates. You may have to turn on the view of hidden files; through Windows Explorer click on , select Folder and search options, and on the View tab, check *Show hidden files, folders and drives*, then click on OK.

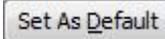
## Creating a New Template

### Exercise 121

- 1 Click on  then click on . With Blank document selected click on .
- Ctrl S 2 Click on the Save button  OR click on  and select .
- 3 Click on the Save as type:  and select Word Template.
- 4 At the top left of the Save As dialog box, in the Navigation pane, click on .
- 5 In the File name: box type: **YC Letterhead** as the name for the template.
- 6 Click on Save. The name of the template now appears at the top of the screen.

- 7 Click on the Home Ribbon, Font Group dialog box launcher  and change the font to Arial 11pt.
- 8 Click on . From the dialog box select *All documents based on the YC Letterhead template*.



- 9 Click on OK.
- 10 On the Page Layout Ribbon click on the Page Setup dialog box launcher . Change the top margin to 1.5 cm and the left and right margins to 3 cm. Click on . Click on Yes. This will change the default margins.

By changing the defaults in the *template*, all documents based on the **YC Letterhead** template will have these changes.

- 11 Type a letterhead as follows:

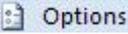
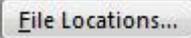
You will need to set a right aligned tab for the text which is aligned at the right margin, i.e. postal address and fax number.

The line is inserted by typing three hyphens --- then pressing Enter if you have *AutoFormat As You Type* turned on. Otherwise select Top Border from the Borders button, press Enter, then Ctrl Q to clear formats.

## Young & Cranshaw Dentists

17 Tait Place  
Carrara QLD 4211  
Phone: (07) 5594 6789

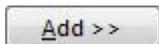
PO Box 23 546  
Carrara QLD 4211  
Fax: (07) 5594 7688

- 12 Save the template.
- 13 Click on  then click on . Select the Advanced option from the left hand list and scroll down to the General section. Click on  to see where your templates are stored (i.e. User templates). Click on Close then Cancel.

AutoText entries and macros can be saved to the actual template. This is necessary if you are going to use the template on another computer or if you want the AutoText entries to be specific to that template. Generally it is preferable for AutoText entries to be “global”, i.e. saved to the *Normal* template.

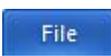
To save an AutoText entry to the template, select the text then click on the AutoText button  on the Quick Access Toolbar. Click on . Give the entry a name, click on the  of the Save in: box and select the template, then click on OK.

- 14 To Add the AutoText button to the Quick Access Toolbar click on the Customise Quick Access Toolbar button  and select *More Commands*.

- 15 In the Choose commands from: box select All Commands then scroll down the list and select  AutoText .
- 16 Click on  then click on OK.
- 17 Close the template.

## Using the YC Letterhead Template

### Exercise 122

- 1 Click on  then click on .



- 2 From the Available Templates section click on
- 3 Select **YC Letterhead** and click on OK.

**Note** You are creating a *document* based on the **YC Letterhead** *template*.

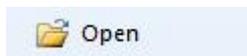
The Young and Cranshaw letterhead you have created will appear on screen.

- 4 Press Ctrl End then type a short letter advising a change of fax number to **(07) 5594 8600** to: John Badham, Dental Hygienist, PO Box 58 889, CARRARA QLD 4211.
- 5 Save your document with the file name **Change of Fax Number**. The *document* will be saved back to your working folder (usually My Documents).
- 6 Print the letter and close.

## Editing a Template

To edit a template it must be opened from the relevant Templates folder.

### Exercise 123

- 1 Click on  then click on .
- 2 Click on  Templates on the Navigation pane.
- 3 Double click on **YC Letterhead**. The template will appear on the screen.
- 4 Change the fax number to read as follows: **(07) 5594 8600**
- 5 Save and close the template.

## Fields

Fields can be used within a template so the user can move from place to place. Fields are inserted by pressing Ctrl F9 then the End key. When the template is used, the F11 key will move you from field to field to insert the variable information (you will do this in the next exercise).

# Patient Information Form

## Exercise 124

- 1 Create the form (as a template) shown below to be used by a dental receptionist for filling in information about patients on the computer. Save as a template with the file name **Patient Info**. Use Arial 10 pt as the default font for this template.
- 2 Set the row height at **Exactly** 0.8 cm for single line rows and at 1.8 cm for the following rows: *Address, Gum problems, Date*. Do this by selecting the appropriate row(s) and on the Table Tools Layout Ribbon specifying the cell height in the Cell Size group.
- 3 Use 6 pt line spacing before all rows.
- 4 Use *field codes* as necessary for information, i.e. at each fill-in point press Ctrl F9 which will show as { } then press the End key. Remove bolding when applying the field codes.

<b>Patient Information</b>	
<b>Surname: { }</b>	<b>First name: { }</b>
<b>Address: { }</b>	
<b>Phone: { }</b>	<b>Date of birth: { }</b>
<b>Doctor: { }</b>	<b>Medical insurance: { }</b>
<b>Previous Dentist: { }</b>	<b>Last dental treatment: { }</b>
<b>Time of appointments: { }</b>	<b>Payment by: { }</b>
<b>Has injections: { }</b>	<b>Allergic to penicillin: { }</b>
<b>Gum problems: { }</b>	<b>Medical problems: { }</b>
<b>Appointment History</b>	
<b><i>Date: { }</i></b>	<b><i>Date: { }</i></b>
<b><i>Date: { }</i></b>	<b><i>Date: { }</i></b>
<b><i>Date: { }</i></b>	<b><i>Date: { }</i></b>
<b><i>Date: { }</i></b>	<b><i>Date: { }</i></b>

- 5 Save and close the template.

## Use the template as follows:

### Exercise 125

- 1 Click on  then click on .
- 2 From the Available Templates section click on My templates.
- 3 Select **Patient Info** and click on OK.
- 4 Enter the following information, pressing F11 to move from field to field.

Surname:	Mackie
First name:	Janine
Address:	14 The Esplanade, NERANG QLD 4211
Phone:	(07) 5596 4785
Date of birth:	3 August 1965
Doctor:	Dr Pearce
Medical insurance:	Medicare
Previous Dentist:	Dr Williams
Last dental treatment:	December 2010
Time of appointments:	Prefers mornings
Payment by:	Visa Card
Has injections:	Yes
Allergic to penicillin:	No
Gum problems:	Occasionally
Medical problems:	Hay Fever
APPOINTMENT HISTORY:	
<i>Date:</i>	15 December 2010
	Filling in Lower 4R

- 5 Save the document with the file name **Mackie, Janine - Info** into your working folder.
- 6 Print and close.

### Exercise 126

#### *Scenario:*

You work for a public word processing agency and type many CVs for people. You are required to set up a template for this purpose. The easiest way is to use a table with two columns. Use the following headings and any others that you consider would be relevant:

#### PERSONAL DETAILS

Name, Address, Phone No, Age, Date of Birth, Health, Marital Status

#### EDUCATION

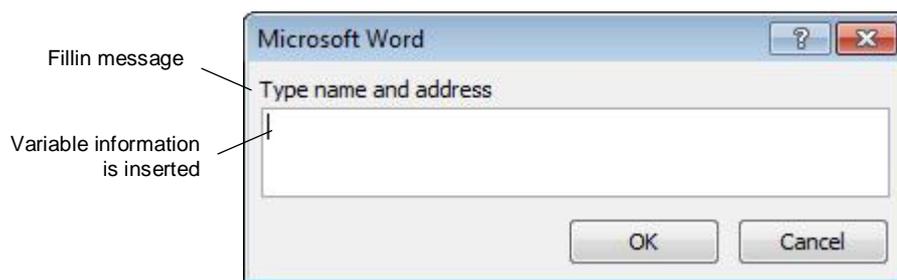
High School, Tertiary

#### WORK EXPERIENCE, TESTIMONIALS, REFEREES

When you have completed the template, save and close it, then use it to fill in a curriculum vitae for yourself.

## Automated Keyboard Merge

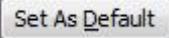
Templates can be “automated” by using *fillin* fields. This means that instead of pressing F11 to move from field to field, prompt boxes will appear for you to fill in information, e.g.

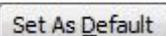


Field codes are inserted by pressing Ctrl F9 to insert field code brackets { } then the word **fillin** is typed followed by a space. The message that you wish to appear in the prompt box is then typed in quotation marks, e.g. { fillin “Who is this fax to?” }. Press End to exit the field.

The following exercise takes you through the process of creating and using an automated template. You will create a letter with fillin fields for confirming training courses to companies.

### Exercise 127

- 1 Create a new document.
- 2 Click on the Save button .
- 3 Click on the Save as type:  and select Word Template.
- 4 In the File name: box type a name for the template **Training Confirmation Letter**.
- 5 Ensure folder you are saving to is *Templates* then click on Save.  
The name of the template now appears at the top of your screen.
- 6 On the Page Layout Ribbon click on the Page Setup dialog box launcher  and change the top margin only to 4.5 cm to allow for a letterhead. Click on  then on Yes.
- 7 Change the default font for the template to Arial 11 pt.

- 8 Press Ctrl A and on the Review Ribbon click on the Language button  and select . Ensure English (Australia) is selected. Click on  then on Yes. Click on OK.
- 9 Insert the date of creation by, on the Insert Ribbon, clicking on  and selecting . Click on the Categories:  and select Date and Time. In the Field names: box ensure CreateDate is selected. From the Date formats: box select the ninth option (e.g. 30 January 2011). Click on OK.

The CreateDate field will be updated when the template is used but will display the date of creation when it is opened at a later time.

- 10 Press Enter twice.

- 11 Use the following instructions for the *fillin* field for the address:
  - a Press Ctrl F9 which will insert field code brackets.
  - b Type: **fillin “Type name and address”**
  - c Press the End key on your keyboard.
- 12 Use the same instructions for all other *fillin* fields throughout the document, changing the message each time, ensuring the brackets, text and quotation marks are exactly as shown below. (It does not matter if field codes wrap to the next line.)

29 September 2010

{ fillin "Type name and address" }

Dear { fillin "Who is this letter to?" }

As discussed with you, we wish to confirm training for your company as shown below.

Date of Course	Program	Time	Number Attending
{ fillin "Date of course" }	{ fillin "Type in the program" }	{ fillin "Type time" }	{ fillin "Type number attending" }

Training will be held at our premises at 4a Tremorne Place, Brisbane, QLD 4000.

Please complete the attached Registration Form and return it to us.

Yours sincerely

{ fillin "Type in sender's name" }

{ fillin "Type in sender's position" }

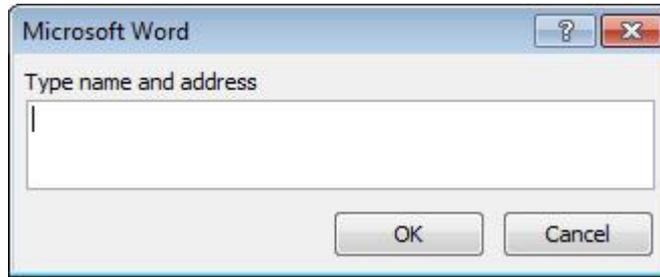
- 13 Save and close the template.

## Using an Automated Template

### Exercise 128

- 1 Click on  then click on .
- 2 From the Available Templates section click on My templates.
- 3 Select **Training Confirmation Letter** and click on OK.

The date will be inserted automatically and the first prompt box will appear on screen (as shown on the next page).



4 Type the following:

Mr David Horrocks (press Enter)

Horrocks & Booth Pty Ltd (press Enter)

PO Box 3475 (press Enter)

BROADBEACH QLD 4218

5 Click on OK OR press Tab then Enter which will move to the next prompt box, i.e. **Dear** (Who is this letter to? prompt box.)

6 Fill in information as shown below.

<b>Dear</b>	Mr Horrocks
<b>Date of Course</b>	30 May
<b>Program</b>	Word 2010
<b>Time</b>	9.00 am - 4.00 pm
<b>Number Attending</b>	4
<b>Sender's Name</b>	Jenny Price
<b>Sender's Position</b>	Training Director

7 Save the document as **Horrocks - 30 May W2010** (Ensure you are saving to your working folder).

8 Print and close.

The template is now available for use in the Templates dialog box whenever required.