

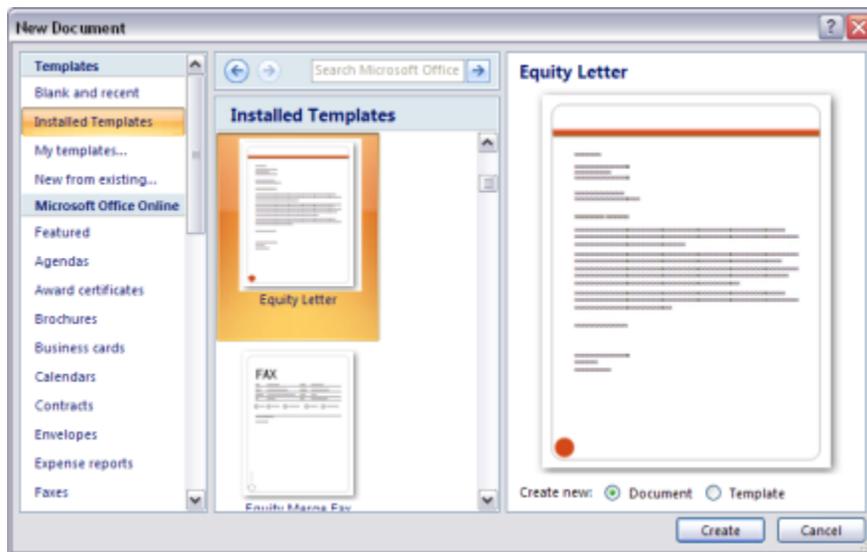
# Templates in Word

by Dick Evans

Simply stated, a template is a starting point for a new document. It is an existing document already containing content, formatting, and design elements.

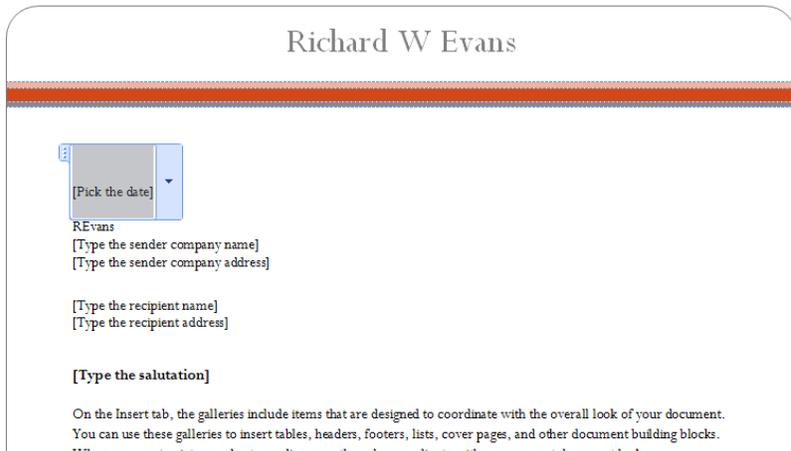
It might be a resume, a meeting agenda, a FAX, or a letter. Rather than starting from scratch, use one of the many built in or available online templates from Microsoft. In addition, you can create your own or modify a pre-made template to fit your needs and save it as a template.

## 1. Open Word, then **Office > New**



In the left pane, there are two set of templates. The top list shows templates on your local hard driver. The bottom list contains links to templates on Microsoft Office Online. You need an open internet connection to use these.

## 2. Under Templates select **Installed Templates**, then scroll the middle list to locate and click the **Equity Letter** to display it in the view pane. Verify the **Create new Document** radio button is selected, and then click **Create**.



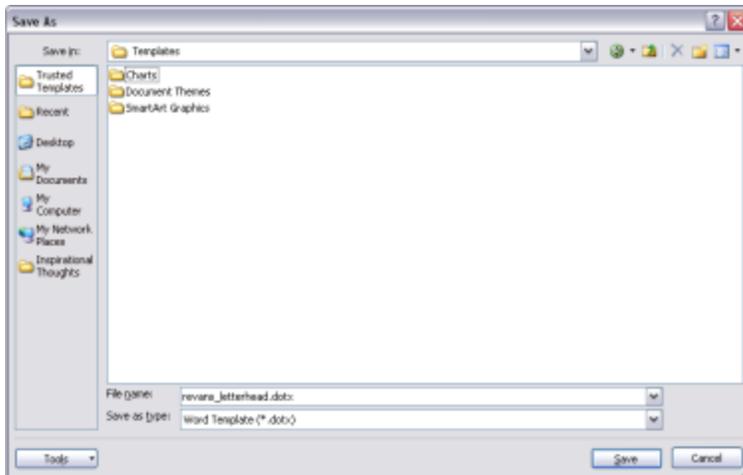
3. **Add a header** (your letterhead) and click each placeholder with your information—the placeholder is between the []. Notice the "pick a date" placeholder. It had a pull down calendar where a date can be picked.



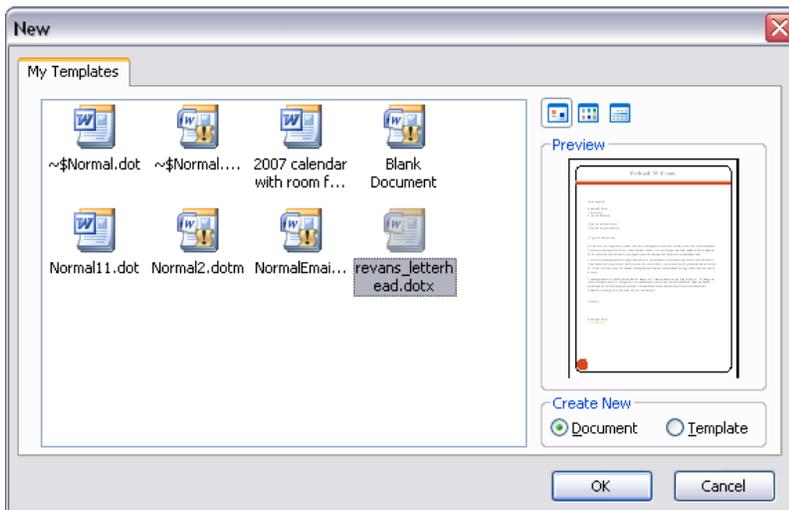
4. **Personalize the letter** by adding your own return name and address, and then your closing lines at the bottom of the letter.



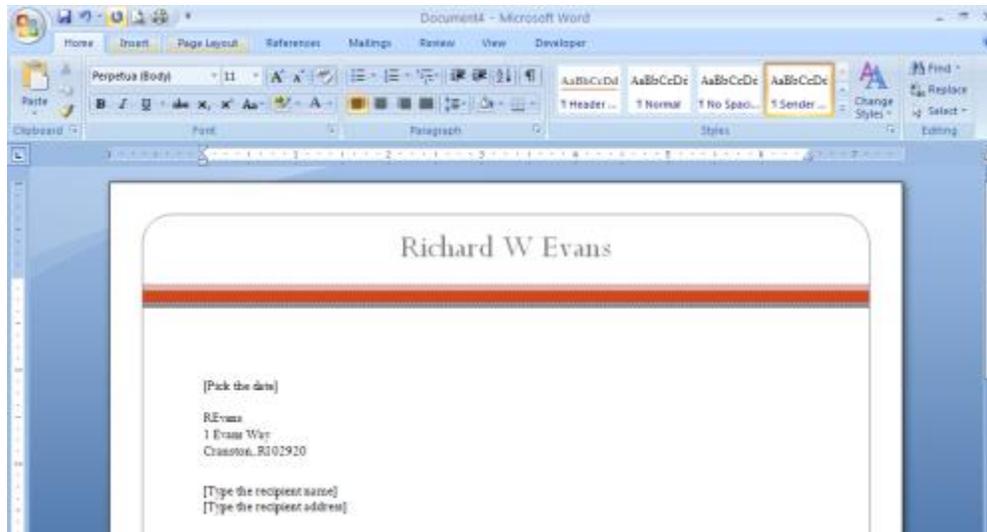
5. **Office > Save As > Word Template**



6. In the **Trusted Templates** folder, save the new Word Template using a name fitting the purpose of the personalize template—I used revans\_letterhead. Click Save.
7. **Office > Close** the template document. Changes to the template file become permanent in the template, so a New document needs to be opened using the personalize template as the starting document.



8. **Office > New > My Templates** to open the My Templates dialog box. Click the personalize template created above, verify that Create New Document radio button is selected, and then click **OK**



A new document window containing the starting letter opens as an unsaved document—notice the Document4 in the title bar. Write the letter and save it as you would any new document as a Word 2007 file.