

Installing the templates

These templates need to be installed – so if you are not sure how to move or copy files, please contact your IT support or get a colleague to help you.

To use these templates they **MUST** first be installed by copying or moving them to the **Templates** folder used by Microsoft Office. This is the way Microsoft has designed templates to work. In later versions of Office this becomes even more crucial as this folder is a ‘trusted’ location – templates installed outside of this folder may not open or run correctly.

This folder can be in one of several locations, depending on which version of Windows you have on your computer - Microsoft Windows 98, Microsoft Windows NT, Microsoft Windows 2000, Microsoft Windows XP or Vista.

The default locations are as follows:

Microsoft Windows Vista

C:\Users\user name\AppData\Roaming\Microsoft\Templates

Microsoft Windows XP

C:\Documents and Settings\user name\Application Data\Microsoft\Templates

Microsoft Windows 98 and Microsoft Windows NT 4.0:

C:\Windows folder\Profiles\user name\Application Data\Microsoft\Templates

Microsoft Windows 98 (without profiles):

C:\Windows folder\Application Data\Microsoft\Templates

Microsoft Windows 2000:

C:\Windows folder\Profiles\user name\Application Data\Microsoft\Templates

or

C:\Documents and Settings\user name\Application Data\Microsoft\Templates

(Where *user name* is the name the user enters when logging-in to Windows)

When you create a new template or customize an existing one and save it, the template is saved, by default, in one of these locations.

Using the templates (Word 2003)

1. Choose **New...** from the **File** menu in Microsoft Word and the **New Document** palette should appear to the right of the document window.
2. Under the **Templates** section click on **On my computer...** This should open the **Templates** dialog box. Double-click on the template you want to open from the **General** tab.
3. This will then open up a new, untitled copy of the template - often with a dialog box where you fill in the name of the recipient, address, subject, salutation etc.
4. Close the dialog box - if there is one - and the cursor should be in the main text area and you can start typing the rest of the letter/fax/memo etc.

Using the templates (Word 2007)

1. Choose **New...** after clicking on the **Office Button** in Microsoft Word (in the top left corner) and the **New Document** window should open.
2. Choose **My templates...** from the **Templates** list on the left of the window. This should open up another dialog box. Double-click on the template you want to open from the **My Templates** tab.
3. This will then open up a new, untitled copy of the template - often with a dialog box where you fill in the name of the recipient, address, subject, salutation etc.
4. Close the dialog box - if there is one - and the cursor should be in the main text area and you can start typing the rest of the letter/fax/memo etc.

Note:

Installing and opening the templates in this way conforms to Microsoft's template model and ensures that the templates function correctly and are protected from accidental alteration.

Macros – some templates supplied by us may use macros...

If you get a warning about macros - this is okay – and you should choose enable macros, as the macro helps you fill in the template using a dialog box.

If you are in any doubt about this, please check with your IT support.

If we have not supplied the template and you are unsure of the source of the template – DO NOT ENABLE MACROS – but check with IT support. Viruses are often transmitted via Word macros embedded in Word templates.

If you are using Office 2007 and the templates are not loading properly you may need to check the **Trust Center Settings**. Click on the **Office Button** and then the **Word Options** button at the bottom of the panel. Select **Trust Center** from the list on the left. Click on the **Trust Center Settings...** button and check the **Macro settings**. You may also need to check the **Trusted Locations** as well.

If you need to check the location where templates should be saved:

Word 2003:

1. Start Microsoft Word 2003.
2. On the **Tools** menu, click **Options** at the bottom of the menu.
3. On the **File Locations** tab, click **User templates**, and then click the **Modify** button.
4. In the **Modify Location** dialog box, click on the word **Templates** at the top of the dialog box (alongside **Look in:**), and look at the pop-up menu that appears
– **this shows you the current location of the Templates folder.**
5. Click the **Cancel** button at the bottom right of the **Modify Location** dialog box to make sure nothing is changed.
6. Click **OK** or **Close** to close the **Options** dialog box.

Word 2007:

1. Start Microsoft Word 2007.
2. Click the **Office Button** and then the **Word Options** button at the bottom of the panel.
3. Select **Advanced** from the menu on the left then scroll down in the panel on the right of the window until you see the **File Locations...** button and click it.
4. In the File Locations dialogue that appears, click on **User templates** in the list, and then click the **Modify** button.
5. In the **Modify Location** dialog box, click on the word **Templates** at the top of the dialog box (alongside **Look in:**), and look at the pop-up menu that appears
– **this shows you the current location of the Templates folder.**
6. Click the **Cancel** button at the bottom right of the **Modify Location** dialog box to make sure nothing is changed.
7. Click **OK** or **Close** to close the **File Locations** dialog box.
8. Click **OK** or **Cancel** to close the **Word Options** dialog box.

(You may also need to check the **Trusted Locations** settings match this location if the templates are not loading – see the blue macros panel above).

If you work for a company with a central file server, templates may be stored on a network drive and the user's copy of Word configured to look for templates on that drive – but this would usually be set-up by your systems administrator or the IT department, who should install the templates for you.