

October 2010 - Letter from the Editor

Welcome to the tenth edition of the BetterSolutions.com newsletter. And yes the last one we wrote was August 2009. The reason it has been so long is because we have been focusing our attention on building a dedicated VBA section for the website and complements the three existing sections very well. This includes a detailed list of all the built-in subroutines and functions as well as lots of code snippets. In this issue we are going to focus on Word templates. We hope to clarify the different types, the best place to save them and the easiest way to keep them updated. For those of you who use Excel, the ideas and methods discussed regarding sharing and updating can easily be applied to Excel as well. As you can imagine we get a lot of people contacting us with a wide variety of questions, some simple and some more complicated. We will always try to reply to your questions within a few days but sometimes it can take longer.

Dedicated VBA Section

A new section focused entirely on VBA is now available. This can be accessed from the home page and has the following URL: <http://www.bettersolutions.com/vba.aspx>.

I hope you all visit this new section and find it useful. This section will eventually be fully integrated with an additional link appearing at the top of every page. Please keep sending us your comments and feedback.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26																									
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z																									
Tutorials - Visual Basic for Applications																									
Add-ins	MsgBox & InputBox																								
Arrays	Numbers																								
Class Modules	Objects																								
Collections	Options																								
Colours	Printing																								
Controls	Procedures & Functions																								
Databases	References																								
Datatypes	Registry																								
Dates & Times	Security																								
Debugging	Shortcut Keys																								
Enumerations	Strings & Characters																								
Error Handling	Syntax																								
Events	Toolbars & Menus																								
File System Object	Userforms																								
Files & Directories	Variables																								
Help	Visual Basic Editor																								
International Issues	Visual Basic Editor Macros																								
Linking & Embedding	Web Interaction																								
Macros	XML																								

What is SharePoint?

Most users have to use a variety of systems, some accessed online and others installed locally. The complexity of these systems and the lack of integration mean that most of us have a frustrating relationship with our computers. You often need a different password for each system which you find difficult to remember and are frequently phoning the helpdesk when your computer isn't working. You receive hundreds of emails a day which you keep for reference but are too busy to read and instead of your day getting easier, each new release seems to make things more complicated. The key to solving this problem is to create a user experience that simplifies how we access all our information. The answer is SharePoint.

SharePoint is a web based tool that allows people to save and display different types of information all in one place. SharePoint enables you to share documents, e-mails, lists, calendars, etc and is very tightly integrated with Microsoft Office. This integration is so significant we are considering building a dedicated section on the website specifically for it. We briefly discussed Windows SharePoint Services (version 3) in the May 2008 issue so to help us to recap here is a quick summary of all the different versions and when they were released:

Version 1 - Microsoft SharePoint Team Services released Mar 2001

Version 2 - Windows SharePoint Services 2.0 released Dec 2003 in conjunction with Office 2003

Version 3 - Windows SharePoint Services 3.0 released Feb 2007 in conjunction with Office 2007

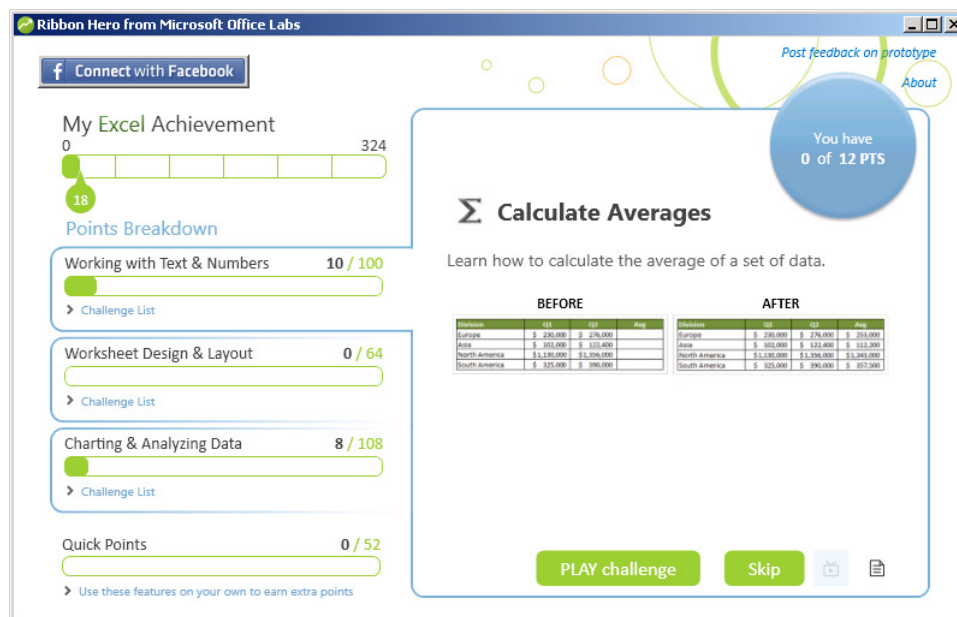
Version 4 - SharePoint Foundation 2010 released May 2010 in conjunction with Office 2010

News and Related Information

Ribbon Hero

Ribbon Hero is a learning/training add-in created by Microsoft for people who are using Office 2007 or 2010. It is designed to help you become more familiar with the Ribbon interface and help you find new and existing functionality. It has been designed very much like a game, in an attempt to bring some interactive fun to your day-to-day. The add-in works with Excel, Word, PowerPoint and OneNote. Each application has a specific set of challenges and you are awarded points for completing particular tasks. Doug Thomas has created a great introduction video and you can download this add-in from the Office Labs website:

<http://www.officelabs.com/projects/ribbonhero/Pages/default.aspx>



Once installed, it appears as a single button in an additional group on the Home tab. A challenge will be displayed the first time you open an application and after that you just hit the Ribbon Hero button to view another challenge. We weren't sure what to make of this as the reviews seemed to be mixed. But after installing it and completing some of the challenges we really like it. It is very easy to use and is not intrusive at all. It is fair to say that this does actually feel like a game in the sense that it is quite addictive. The best feature has to be when the two balloons pass through the task pane.

support@bettersolutions.com

This email address is the one you should use when you have any problems or questions with Microsoft Office and you want some FREE help and advice. Sending us your questions will not only mean that you get a reply quickly but will also allow us to publish the answers in the next issue which will help other people as well. We spend a lot of time checking and testing the information to ensure that it is accurate but if you do spot any mistakes or anything that is wrong then please tell us. We are always looking for ways to improve our products and services and always welcome constructive criticism.

Office Business Application (OBA)

OBA is the term used when a Microsoft Office application contains an interface to a third party enterprise system. This term is frequently used to describe applications that are designed to help businesses unlock the potential of their internal systems. Creating an Office Business Application will often make your application more accessible and easier to use because users are already familiar with the Microsoft Office interface. This can be useful if you have internal systems that have very bespoke or complicated interfaces. For example instead of Outlook just showing you emails and meetings you could write an Outlook Business Application that could display useful HR information as well. Office Business Applications can encompass a huge range of technologies. In addition to third party (non Microsoft) applications they sometimes also include other Microsoft technologies, such as: SharePoint, SQL Server, Exchange, BizTalk, Groove, etc. Third party applications are sometimes referred to as Line of Business applications or LOB for short.

Microsoft Office 2010 Versions

This is a summary of the different versions that are available for Office 2010.

Starter – This replaces the earlier Microsoft Works applications and will be pre-installed on most new PCs. This includes Excel and Word with some of the advanced features excluded. There are four tabs instead of the usual seven and will also contain a small amount of advertisements.

Home and Student – This includes Excel, Word, PowerPoint and OneNote.

Home and Business – This includes Excel, Word, PowerPoint, Outlook and OneNote.

Standard – This includes Excel, Word, PowerPoint, Outlook, OneNote and Publisher.

Professional – This includes Excel, Word, PowerPoint, Outlook, OneNote, Publisher and Access. Professional Academic and Professional Plus contain the same applications but just have slightly different pricing models.

Office Web Apps – These are light weight web browser versions of Excel, Word, PowerPoint and OneNote.

Office Mobile – These are cut-down versions of the Excel, Word, PowerPoint, Outlook and OneNote. This is FREE but is only available on phones that run Windows Mobile 6.5 or later.

Compared to the versions that were available in Office 2007 (March 2007 issue) this is a much simpler list. With only 5 different suites to choose from, it is a lot easier to identify which one is right for you.

Disclaimer

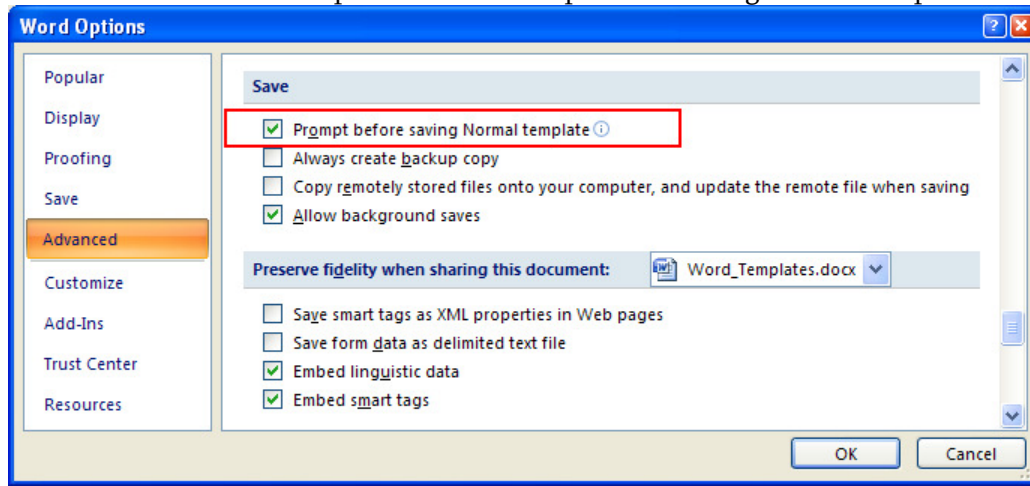
Better Solutions Limited is in no way associated with Microsoft Corporation. All the content in this newsletter and on the website is provided “as is” with absolutely no warranties. We strongly recommend that you back up all your data first before installing any updates or third party software. In no event shall Better Solutions Limited be liable for any special, indirect or consequential damages whatsoever resulting from loss of use, data or profits, whether in an action of contract, negligence or other action arising out of or in connection with any information published in this newsletter or on our website.

Your Questions and Problems

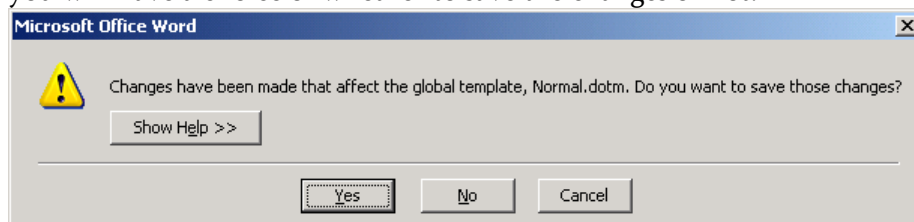
Word – Can I get a prompt before my Normal template is updated?

Whenever you make any changes to your default settings these are saved in your Normal template. There are a wide variety of default settings in Word which you can change. Two of the most common ones are your default font and your default language. Your default font can be changed from the Font dialog box by pressing the Default button and your language can be changed from the Language dialog box also by pressing the Default button.

It is possible to receive notification whenever changes have been made to your Normal template. In all the versions this prompt is switched off by default but it is very easy to switch it on. On the Word Options, Advanced tab there is an option called “Prompt before saving Normal template”. Make sure this is ticked.



With this option switched on you will get the following prompt whenever changes have been made. This appears after the documents have been closed but before Word exits. From now on every time your Normal template is changed, either as a result of your own action, a consequence of an add-in or built-in functionality you will have a choice of whether to save the changes or not.



If you are unable to save changes to your Normal template then it may be that your template has been opened as read-only.

General – Are you going to create Outlook or Access sections for the website?

Yes. They are both in the pipeline but are a long way off from being uploaded. We often receive suggestions on how to improve the website and recognise that these would be useful additions.

General – Are you going to update the design of the website?

Yes. The simple design and layout of the website is key to its speed and quick navigation but we do have plans to update it. We are busy working on a new style sheet at the moment as well as building new pages.

Word Template and Document Relationship

Every Word document is based on a template and every Word document has a template permanently attached to it. When you create a new document the template used is attached automatically. When you create a blank document the template used will be your Normal template. At this point it is important to appreciate that Excel templates and Word templates behave slightly differently. In Excel everything from the template is passed to the workbook. However in Word, this is not the case.

What is passed to the Word document?

When you create a document the following items are copied from the template and passed to the document.

Styles – All the styles that are available in the template.

Content – Any content that has been saved in the template, any sample text, tables, headers, footers, etc.

Page Layout – The page setup and layout of all the pages. This includes margins, paper size, and page orientation.

All of these items are copied to the document (from the template) when the document is created.

What isn't passed to the Word document?

When you create a document the following items are not passed to the document.

Macros – Any macros or macro project items. These include code modules, class modules or userforms.

User interface customisations – Any additional toolbars or menus.

Keyboard shortcuts – Any keyboard shortcuts that have been overwritten or assigned to macros.

Auto text /building blocks – All built-in or user defined auto text or text snippets.

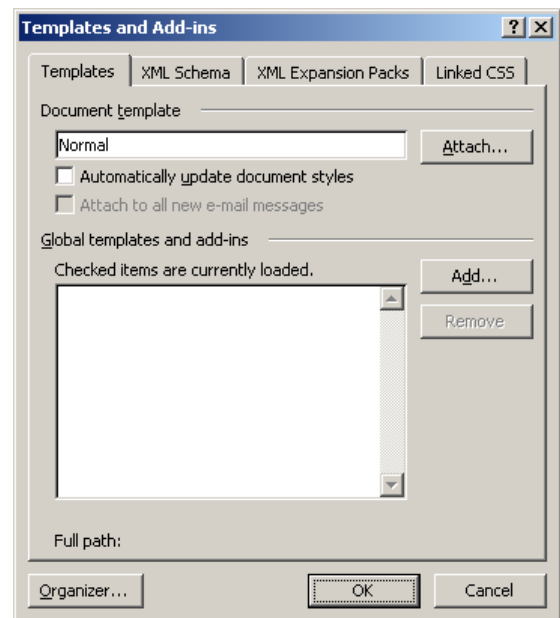
None of these items are copied to the document (from the template) when the document is created.

When you create a new document the template stays attached so these items can be accessed.

What Template is attached to this document?

Every Word document has a template permanently attached to it. To find out what template is attached to a document you can display the “Templates and Add-ins” dialog box. In Word 2003 this is displayed by selecting (Tools > Templates and Add-ins)(Templates tab). The name of the template is displayed at the top, under document template.

In Word 2007 and 2010 this dialog box can only be accessed from the Developer tab by selecting “Document Template” from the Templates group. This tab will not appear by default but can be displayed by selecting Word Options, Popular/General tab and then ticking the option “Show Developer tab in the ribbon”.



Only documents created from the Normal template are linked to the Normal template. If you create a document using any other template then your document has absolutely no links (or ties) to the Normal template.

Different Word Templates

A template is a special type of document that should be used when you want to create several documents all with a consistent look and feel. All templates contain specific settings relating to the styles, content, page layout, macros, user interface customisations, keyboard shortcuts and auto text. Word provides a large selection of built-in templates but if you still can't find the right one then there are plenty more available on the Office Online website. Before we discuss the different types, below is a list of the associated file extensions:

.dotx – Templates in Word 2010 and 2007 with no VBA macros

.dotm – Templates in Word 2010 and 2007 that contain VBA macro code

.dot – Templates in Word 97-2003 with or without VBA macros

Normal Template

This is the most important template out of all of them and should never be shared. This template should always exist locally on the C drive. If there are any copies saved on shared drives then they should be removed to avoid confusion. This template may not exist if a user has a clean install of Microsoft Office or has not made any changes to their personal settings. This template is a special example of a user template and therefore is always saved in the User Templates folder.

Location: Always saved in the "User Templates" folder.

User Templates

A user template is a template that is saved locally on the C drive and can only be accessed by that individual user. Any template saved in this folder will automatically appear in the New dialog box. This location must never be changed to a shared drive as the user's Normal template is saved in this folder when changes are made. This location defaults to the C drive.

Location: C:\Documents and Settings\"username"\Application Data\Microsoft\Templates\

Workgroup Templates

A workgroup template is a template that is shared across a team or company. Any template saved in this folder will automatically appear in the New dialog box. This location defaults to not being set but should be changed to point to a shared drive when you have company templates that you want a group of users to access.

Location: S:\Shared Folder\Workgroup Templates\

Startup Templates

These are templates that are permanently loaded and are available whenever Word is open. They are often referred to as global templates but they should really be thought of as add-ins rather than templates. In most situations there is normally only one startup template. This location defaults to your C drive but should be changed to point to a shared drive when the template needs to be shared by a group of users.

Default: C:\Documents and Settings\"username"\Application Data\Microsoft\Word\STARTUP\

Location: S:\Shared Folder\Startup Templates\

Built-in Templates

These are templates that are saved locally on the C drive and are installed by default when Word is installed. Any templates saved in this folder will automatically appear in the New dialog box.

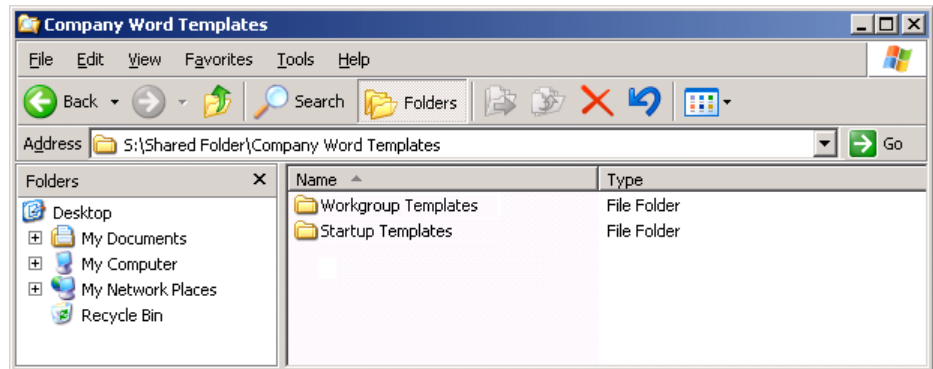
Location: C:\Program Files\Microsoft Office\Templates\1033\

Saving Shared Templates

Any templates that are not specific to an individual user should be saved on a shared drive (i.e. your workgroup templates and startup templates). Once you have identified a shared drive that all your users can access, create a folder called “Company Word Templates”. This should be a folder which everyone can access but only a few administrators have permission to edit. This folder should contain two subfolders, one for your workgroup templates and one for your startup templates. Create these two subfolders, see screenshot below.

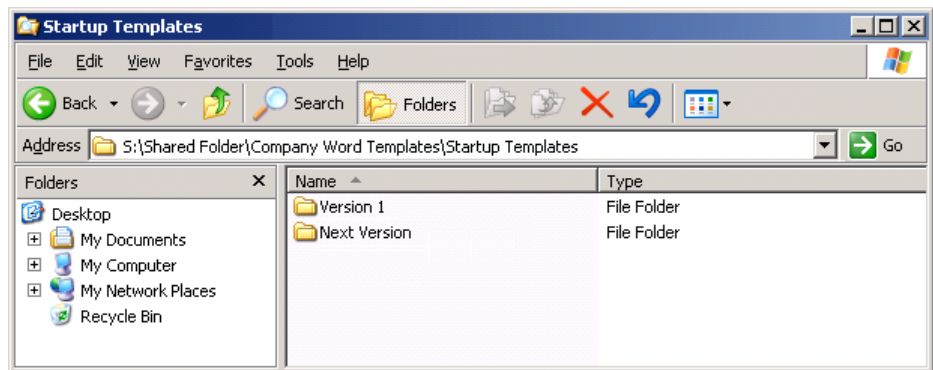
Workgroup Templates

These are templates that are accessed on demand as and when users need them. They are accessible from the New dialog box and are for general tasks, like creating letters, faxes, memos, etc. All your company templates should be saved in this folder.



Startup Templates

These are templates that are available to every user when they open Word and often contain macros or company specific customisations. A template that is saved in your startup folder is considered to be a global template (or add-in) and will be loaded automatically every time Word is opened. Create two subfolders in the “Startup Templates” folder. One will be for the current version of your template called “Version 1” and the other will be for the next version of your template called “Next Version”. Copy your startup template into the “Version 1” folder and also into the “Next Version” folder.



The reason for creating two folders both containing the same template is to make a clear distinction between the current version and the version under development. The file in the “Version 1” folder is the live template that everyone will be using. The file in the “Next Version” folder is the one you will edit when you need to make changes. Once you have made your changes (and tested them) you just rename the “Next Version” folder to “Version 2” and update the shortcut (see next page).

In preparation for the next set of changes create another folder called “Next Version” and copy across the template from the “Version 2” folder. It is good practice to include the date as well as a version number in your filenames.

Creating Template Shortcuts

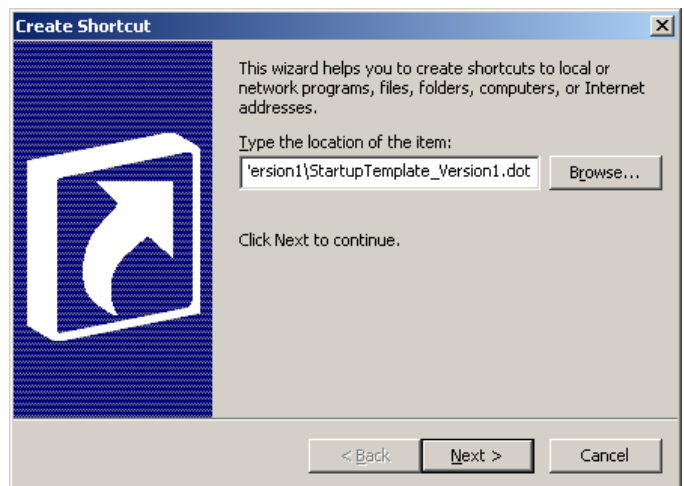
There will always be some of your users in Word or that leave Word open so you need a method of updating which doesn't create locks on the actual templates. By using shortcuts instead of direct references you are able to make changes without the users having to close Word first. When you want to update the template all you need to do is to change the target path of the shortcut to point to a different template. Once the target path has been changed the next time a user closes and reopens, the new template will be loaded instead.

Creating a shortcut for your startup template

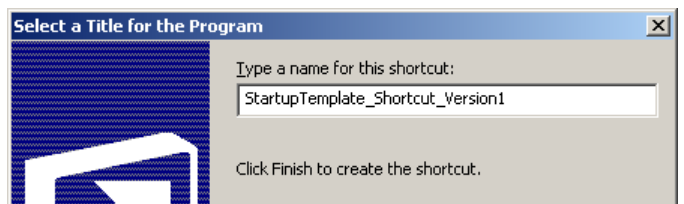
You will need to create shortcuts for all your templates although the process is identical regardless of the type of template. First we need to create a shortcut to your current template (the one saved in your "Version 1" folder). In Windows Explorer open the shared "Startup Templates" folder. In our example this is:

S:\Shared Folder\Startup Template\

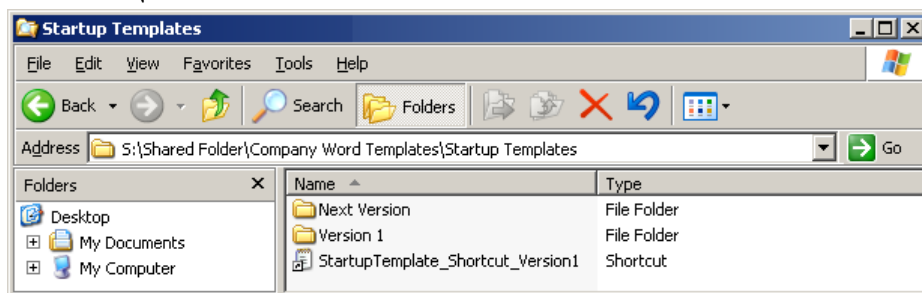
Right click in this folder and select (New > Shortcut). Browse to the "Version 1" folder, select your template and then press Next. In our example this is: "StartupTemplate_Version1.dot"



Enter a name for the shortcut, making sure you include the word "shortcut" to avoid any confusion and press Finish. In this example we have used: "StartupTemplate_Shortcut_Version1"



Two subfolders and a shortcut



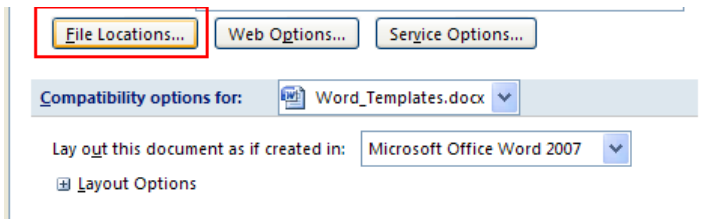
At the end of all this you should have your final template saved in both the "Version 1" subfolder and the "Next Version" subfolder (ready for future amendments) as well as a shortcut to the "Version 1" template. Remember that it is the "Startup Templates" folder, not any of the subfolders that users will be using for their startup directory.

We are almost there. The final step is to check that all your users are pointing to the right folders.

Checking Template Locations

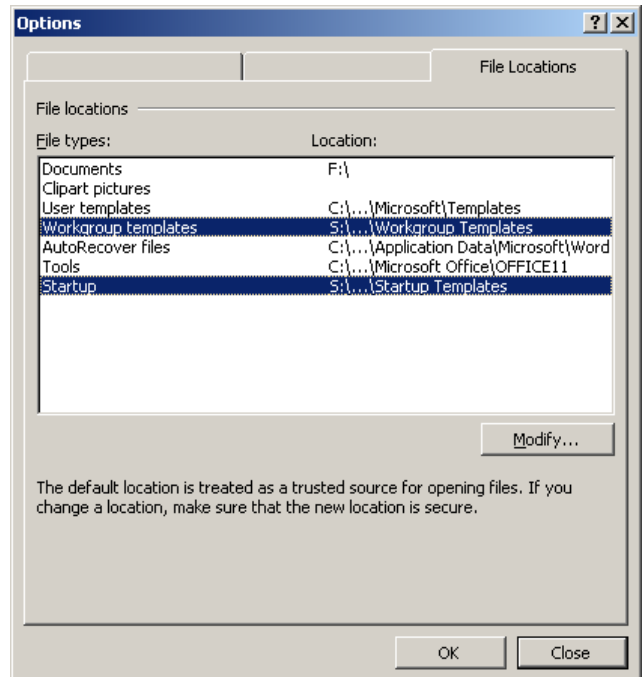
Once the templates have been saved and the corresponding shortcuts created the next step is to check that all the users are pointing to the right locations. Users can easily check the template locations by displaying the File Locations dialog box. In Word 2003 this can be displayed by selecting (Tools > Options)(File Locations tab). In Word 2007 and 2010 this can be accessed from (Office > Word Options)(Advanced tab) and scrolling to the File Locations button at the bottom of the dialog.

This dialog box allows you to check and modify the folder paths of your template locations.



Pressing this button will display the File Locations tab.

To change the location of any of these templates select the item and press the Modify button.



User Templates

C:\Documents and Settings\"username"\Application Data\Microsoft\Templates\

This should never be changed and should be pointing to the users Templates folder located on their C drive.

Workgroup Templates

S:\Shared Folder\Workgroup Templates\

This needs changing and should be pointing at the Workgroup Templates folder on your shared drive. This contains the company's general templates that are available from the New dialog box.

Startup Templates

S:\Shared Folder\Startup Templates\

This needs changing and should be pointing at the Startup Template folder on your shared drive. This contains the shortcut you created earlier to your global template.