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## Using SharePoint or Other Virtual Networks with Templates

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Templates will work different when using SharePoint or Other Virtual Networks. A good understanding of how templates attach to documents will help most clients determine the best solution for using Word Templates with these networks. These instructions review the concept of using templates or using a macro-enabled document rather than using a template.

### Disappearing Templates or Templates Becoming Unattached

When a document is created using a template, the template will show up in the developer tab. However, if you send the document to someone who is not connected to the same network that the template is on, the template will revert to the Normal.dotx file on that user's machine. Also if a person opens the file in Word 2003 or older, the DOTX file will detach and the DOT file with Word 2003 will be attached. These challenges are easily solved by determining which approach to use.

Your company has a choice on how to attach the Ribbons to the Documents. You can either have the Ribbons in the Document or you can attach a Template.

*NOTE: You can save a DOCM file as a DOTM to convert it to a Template. You can also save a DOTM file to save it as a DOCM. Just open the document and perform a SAVE AS command and change the type.*

### Using a DOCM (Macro-Enabled Document) Instead of Templates

The benefit of using a DOCM is that all the styles, macros, and ribbons are actually in the document. The word file becomes portable and the end-user does not need access to the folder with the Template. The only draw-back is that if styles change, they will need to be changed in each document or they will need to be updated in the Master file near the end of production.

To use a DOCM file, simply copy and paste each of your documents into the DOCM file and save it as a DOCM with the New Section Name. This is fairly simple and can be sped up by using the following key-board short-cuts and instructions. *NOTE: You cannot save a file that is attached to a Template as a DOCM file and expect it to work once the template is lost.*

- 1 Open the Original DOCM file with the Correct Styles and Ribbons
- 2 Open the Document for the Section (with the headings and RFP references)
- 3 In the Document for the Section: Click **CTRL-A** (to Select All), Click **CTRL-C** (to Copy), **Switch Windows** to the DOCM file, Click **CTRL-V** (to Paste), Use the Smart Paste ICON to **Select Use Destination Styles** (to ensure you use the styles in the DOCM file), Use the **Save-As** command to give the file a new name. *Make sure you save the file as a DOCM.* The file can now be sent to anyone regardless if they are on or off the Network.

### Attaching a DOTM (Macro-Enabled Template)

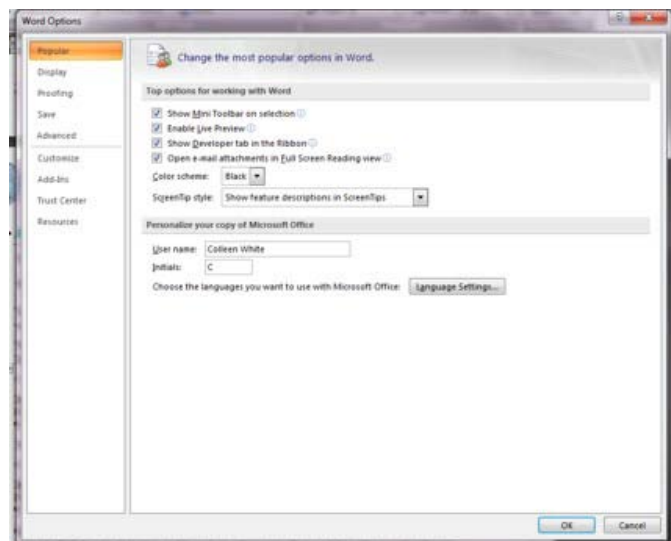
The rest of this section discusses using a Template and how to attach Templates. Templates are very powerful in that one change to a template will make changes to all the documents that are

attached to that template. Plus templates can be attached and detached to documents easily. When you detach a template, all the styles stay with the document, but the Ribbons and Macros are removed from the document. This is important when you want to send the final file to the Government. *TIP: You can even attach a template to a DOCM file. SharePoint lets you use templates attached to all the documents in a certain folder. By using DOCM files attached templates, your styles will automatically update in all your documents. This is required with networks that are password protected since the network only lets the user open one file at a time. The user is not able to open the file in the background for the macros to work, but the styles will be updated upon opening the document without actually opening the template in the background.*

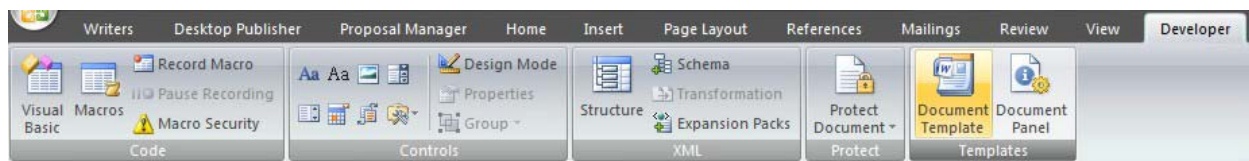
### Turning on your Developer Tab

To attach a template you will first need to turn on your Developer Tab.

- 1 Click on your Microsoft Office button and at the bottom click Word Options.
- 2 When the Word Options Dialog box appears check the box titled Show Developer tab in the Ribbon located under the Top Options for Working with Word.
- 3 Click OK



The Developer Tab will appear in the Ribbon after you choose OK.



The Developer Ribbon has five groups. The templates group is the last one on the right. The command you need is the Document Template command.

### Attaching the Template

After the Developer Tab is included in the Ribbon, you will be able to attach a template to a document by following the next simple steps.

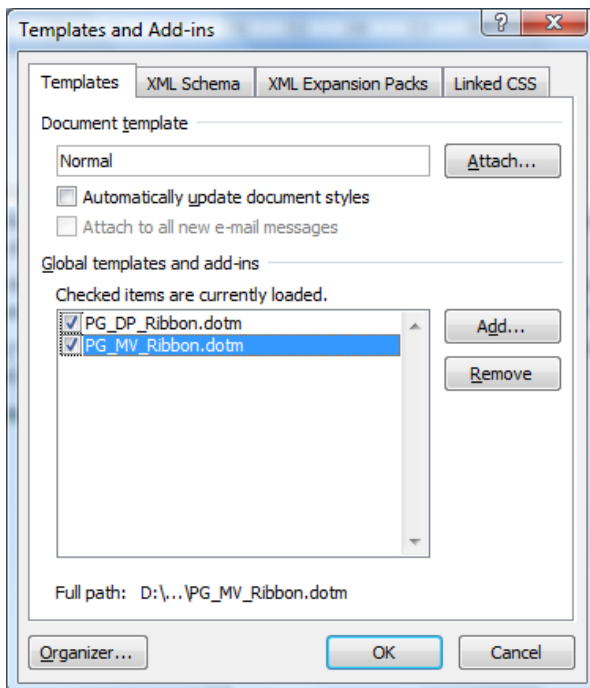
- 1 On the Developer tab click the Document Template button (which is highlighted above in Figure 11.3-2)
- 2 When the dialog box appears click the Attach... button and browse to the folder containing the proposal Template and choose Open.
- 3 Place a check in the box Automatically Update Document Styles and choose OK.

- 4 If the Security Warning Bar appears; click Options and choose to Enable this content then click OK. If the Security Warning Bar does not appear automatically you will need to SAVE the document and then Reopen it so that the Security Warning bar appears in order for the macros to be enabled.

### Attaching More than one Template (Using Global Templates)

There may be times when you need to attach multiple templates to a single document.

- 1 Open the Developer tab and choose the Document Template button again, but this time choose the Add button and browse to the folder containing the additional templates to be added
- 2 The templates will appear in the dialog box. You will need to check or uncheck the additional template(s) to be added to the document.
- 3 Choose OK and the Additional Ribbons will appear in the document.



***NOTE: You MUST place a Checkmark and click OK on the DOTM files ONE-AT-A-TIME to ensure that Word recognizes that the files are Macro-Enabled and gives you an opportunity to enable the macros. If you place a check-mark by both of these at the same time and click OK, Word will only let you enable one of the DOTM files to work. If this happens, go back and deselect the file that is not working. Click OK. Reopen the Dialog box and place a check mark by the DOTM file. Click OK. And then enable the macros when prompted.***