

# Technology Tips

August 28, 2009



## Question:

*How do I use one of the Word or Excel templates designed for my program?*



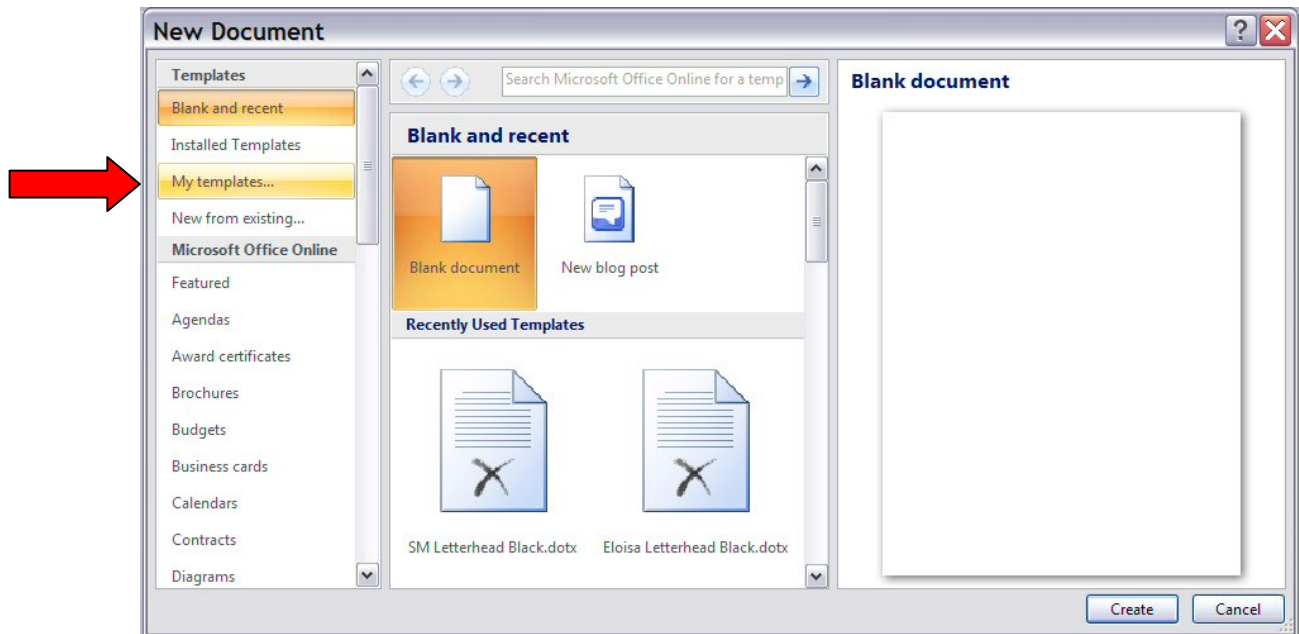
## Answer:

At the Milwaukee County Extension office, we have many special templates developed for use in each of our programs. Templates are commonly used for letterhead, forms that we fill out each week, and mail merge documents. Here's how to use a template:

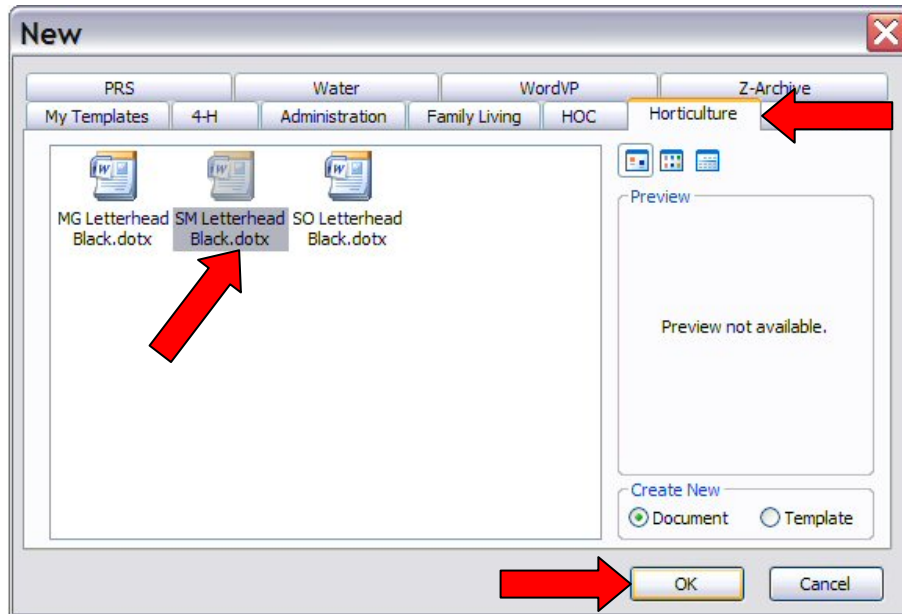
- 1 In the Word or Excel menu bar, click the **Office** button and then click **New** in the drop-down menu.



- 2 In Word or Excel 2007, a New Documents window will open. On the left side of the window under Templates, click **My Templates**.



- ③ A dialog box with lots of tabs will open. Click the **tab for your program**. For example, click the Horticulture tab.



- ④ On the tab for your program, you will see an icon for each template. For example, on the Horticulture tab in Word, you will find icons for letterhead for the staff in this program area. Click to **select a template** that you would like to use. Then click **OK**.
- ⑤ Word or Excel will open a new document based on the template. It will not open the template itself. This means that the template will stay unchanged. Anything you type will be entered in a new document based on the template, not in the template itself.
- ⑥ Before you enter any data in the new document, save it and give it a name. Click the **Office button** and then click **Save** in the drop-down menu. It is important to save and name the document right away. If the computer crashes, you can usually retrieve a named document when you restart your computer and open Word or Excel.
- ⑦ If the document is important, save it to a folder on a network drive such as **Drive M** or **Drive P**. Drive M is your personal folder where only you can save and delete files. Drive P has shared program folders where you can share files with your colleagues. For example, the Nutrition program has a folder called P:\Nutrition that only the Nutrition staff can access. Do not save important files in the P:\Dropoff folder. Anyone in the office can save or delete files in this folder. This is a folder for temporarily storing files that you want to give to someone else in the office. Move important files out of the Dropoff folder into a safer long-term storage location.
- ⑧ When you are done entering data in your document, save the file *before* you print it. If the computer crashes during the print job, you will not lose your work. You can restart the computer, open the saved document and try to print it again.
- ⑨ Once you have used a template, it will appear in the **Recently Used Templates** section of the New Documents window. This will save you several steps the next time that you want to use the template.