

# Create and Use Custom Templates in Word

## What

Instructions to create, save, and use templates that are customized to your needs.

## Why

If you often open Word to a new document based upon the Normal template and have to modify the Normal document for the document you are creating, then just a few extra steps after modifying the Normal document can save you from having to do that modification in the future. You can create different templates where each template can have its own default settings and/or already included graphics. Using a custom template you made will create a document based upon that template, which means the document will have the same default settings that the template has.

## How

### *Step 1 - Create the Template*

- Open a New document in Word as you normally would do, which will be based upon the Normal.dotm template.
- Modify the document as you would want it to be each time you open a blank document based upon this custom template.
- You can enter objects (lines, shapes, pictures, text boxes, etc.) and set the default formatting for these objects; then you can delete the objects after the default settings have been saved. Pressing the *Set as Default* settings on these objects does not change the default settings in the Normal.dotm template, but changes the default for this document (which we will make a different template).
- Once you have all the formatting, logos, default settings, etc. and the document is like you want it to open, proceed to the next Step on how to save your new custom template.

### *Step 2 - Save the Custom Template*

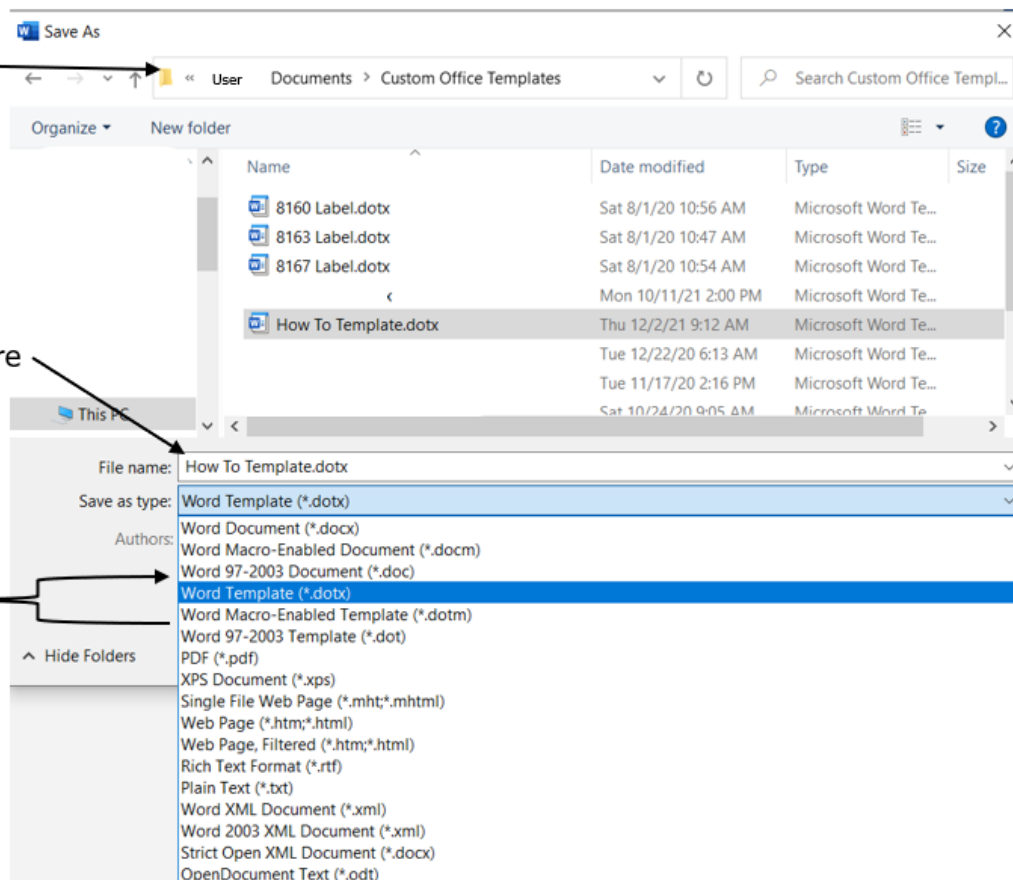
- *Select File > Save As > Browse* to open the *Save as* window. It doesn't matter the location the Browse window opens to because when you select to save as a template File Explorer will automatically change the location to where Word (Office) stores your custom templates....

### **%USERPROFILE%\Documents\Custom Office Templates**

*Side Tip:* Copy and Paste into the Start menu Search box and press Enter key to open folder containing your custom templates.

- Select a Name for the template and enter that name into the *File name:* box as shown below. Select a name that will tell you which template it is.

Will automatically select this location



Enter Template name here

Select .dotx or .dotm template

- Click the dropdown arrow for the *Save as type:* box and select *Word Template (\*.dotx)* or *Word Macro-Enabled Template (\*.dotm)*. Which one? See below. Press the *Save* button to save your custom template.

### .dotx or .dotm

The **.dotx** (or **.docx**) Word format means no macros. This does **not** mean macros will not work in the template (or document). It means that any macro created in this template (or document) will not be saved. If you try to save as **.dotx** (or **.docx**) and you had created a macro, Word will issue a warning that to continue saving will lose the macro. If you created a macro in modifying your custom template, you must save with the **.dotm** format to save your macro.

### *Step 3 - Using Custom Templates*

There are three different ways to open a new document based upon your custom template, which are described below:

#### Open Custom Document Within Word

- In an open Word document select *File > New > Personal* and click the template you want to open a document based upon, as shown in the image below.



- The new document based upon that template will open. The original Word document that you use to open this new document based upon your custom template will still be open.

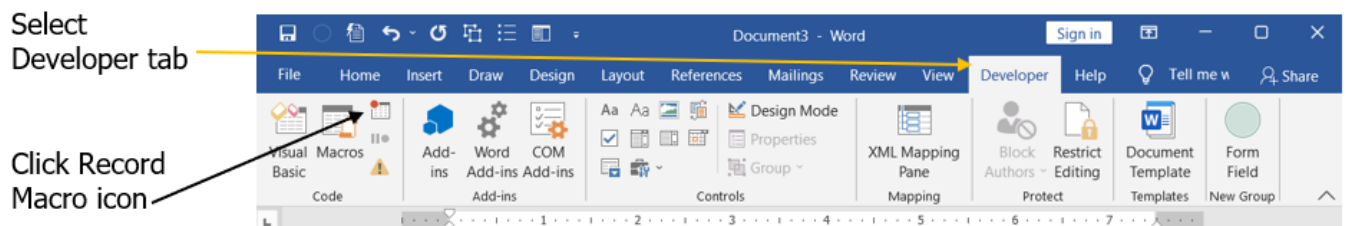
### Shortcut to Open Custom Document

- Right click a blank spot on the Desktop and select *New > Shortcut* which will open the Shortcut wizard.
- In the *Type the location of the item:* box, enter  
**%USERPROFILE%\Documents\Custom Office Templates**
- With the above in that box type a backslash (\) immediately after the "s" in Templates. This will cause a list of the custom templates in that folder to display and you can select from the list. You can alternatively enter the name of the template after the slash, but the name must include the file extension.
- After entering the location of the template click *Next* to go to the next page and select a name for this shortcut and click *Finish*.
- You can move the shortcut anywhere you want.

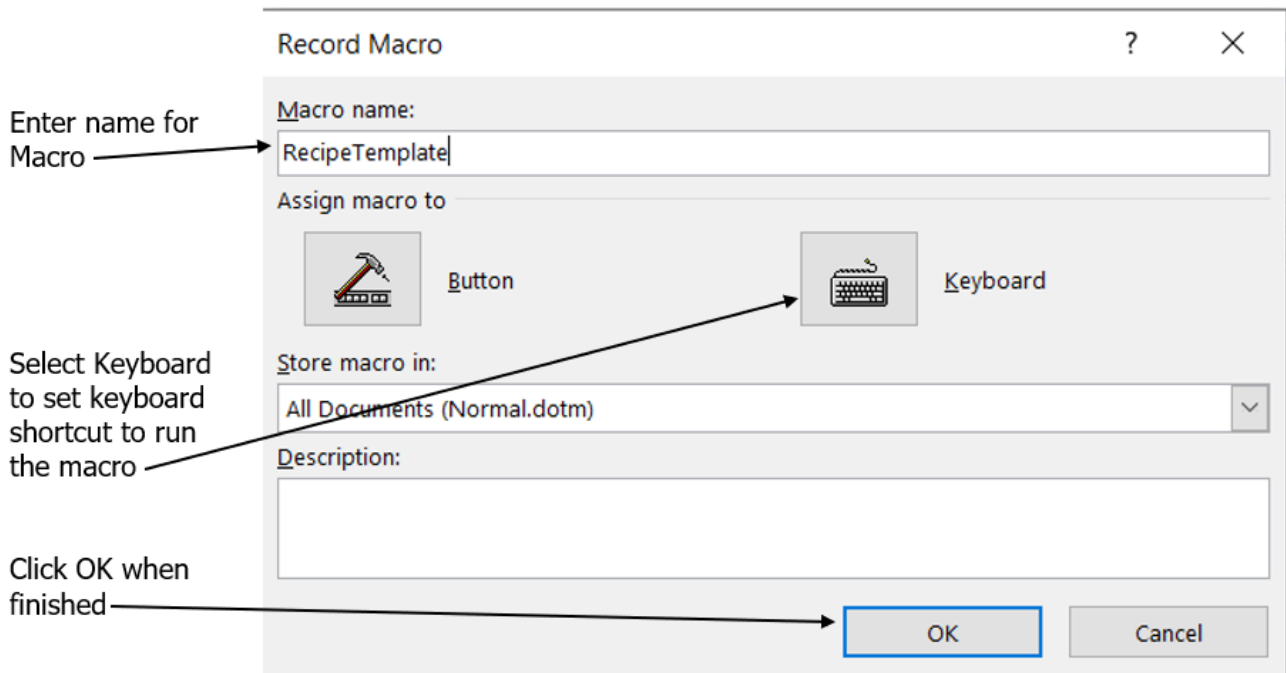
- Clicking a shortcut to a template will open the template; however, when you go to save the document it will default to save as a separate .docx (or .docm) document and not alter your original custom template.
- You can protect your custom template from accidentally clicking the save icon and add all your entered data to the template by going to the folder that the template is stored and make the template file Read Only forcing to save as another file.
- This method does not leave a document open after you open your custom template document.

### Macro to Open Custom Document

- This method is similar to opening a custom document in Word above, but turns all those clicks into a two key keyboard shortcut. Must have Developer tab displayed in Ribbon.
- Open a new document based upon the normal template.
- Select the Developer tab and click the Record Macro icon in the Code group as shown below.

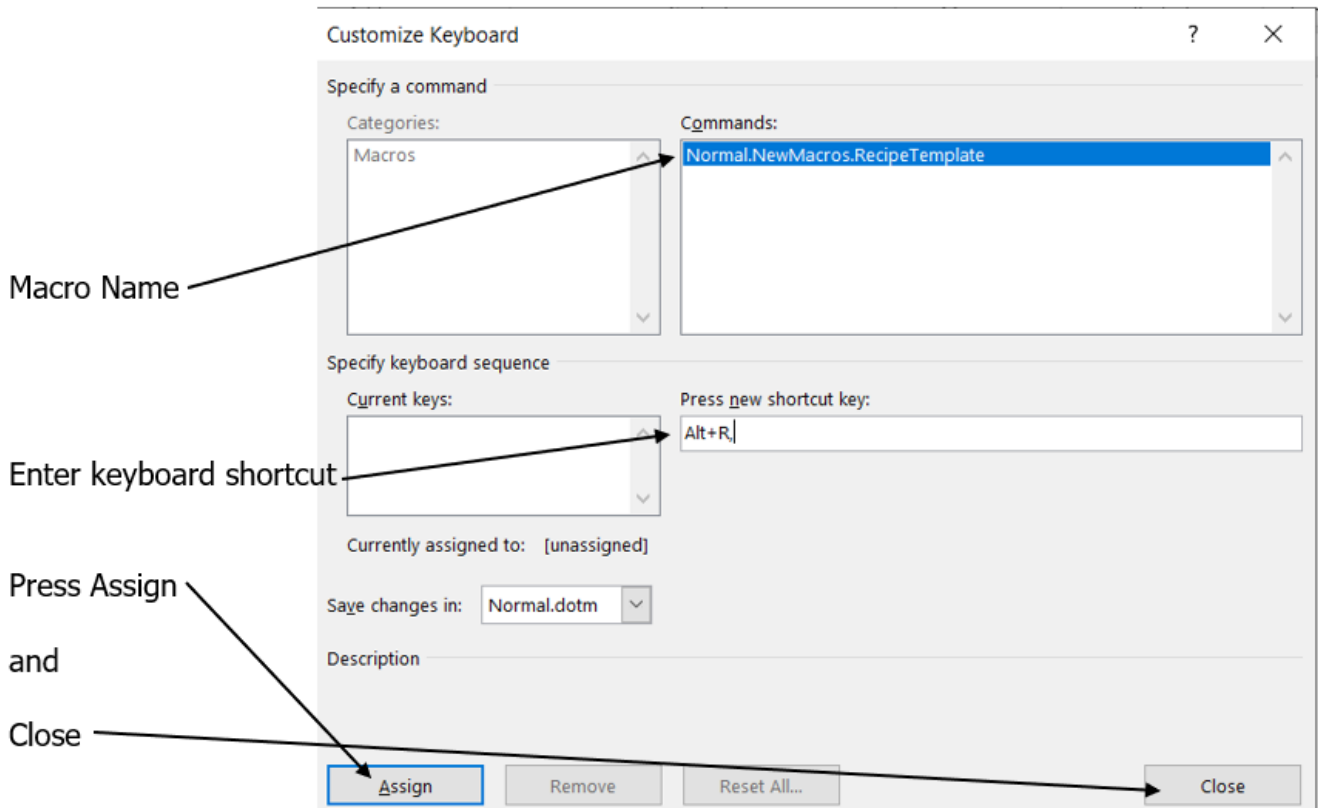



- This will open the Record Macro window as shown below.



- Enter a name for the macro (no spaces in name). Click the Keyboard icon to open the *Customize Keyboard* window to set the keyboard shortcut that will run this macro as shown below.
- In the *Customize Keyboard* window you will see the Macro with full assigned name highlighted in the *Commands:* box.
- Click in the box under *Press new shortcut key:* to activate that box. Press the two keys at the same time that will be your keyboard shortcut. In my example I chose Alt and R keys. If the

- keyboard shortcut you select is already assigned, it will let you know next to *Currently assigned to:* statement. If assigned choose another keyboard shortcut.
- After selecting a keyboard shortcut that is not assigned click the *Assign* button and then the *Close* button to close the window and to start recording the steps of the macro.



- The pointer will change to (  ) and you are now recording every action.
- Click *File*.
- Click *New*.
- Click *Personal*
- Scroll and click the custom template you want and wait for that document to open. Usually it will open on top of the document you are recording the steps in.
- After the document based upon your custom template opens your cursor will still be active in the original document that you are recording the macro in, but it is hidden behind the new document window. Press and hold down the *Alt* key and press the *L* key and release both the *Alt* and *L* keys and then press the *R* key once. This keyboard combination (*Alt + L, R*) will stop the macro recording. If you move the second window to reach the stop recording button on first document, those steps will be added to the macro and often causes a runtime error, so use the keyboard combination to stop recording.
- That's it. When in a Word normal document press the keyboard shortcut and a new document based upon that custom template will open.