

Things I'd Change if I Were King

By Robert Delwood

Ah, to be king – it'd be a good thing. For me of course. My king-ecy would be a cross between MacBeth and MacArthur, but my denizens would benefit too. Mostly in the form of using Microsoft Word templates properly and wisely, emanating from my Solomon-like attributes. I'd like to be declared infallible, too; technically, that's just a formality waiting to happen. Although truly useful, templates are also abused and misused to the point that they become a hindrance. The following are five things I would enforce if I were king.

Absolute path name

This is by far the most misused feature with templates. When attaching a template, you have to select the file, either graphically or by entering a textual path. This path is fraught with danger. In a corporate setting, the template is usually located on the network so that all the users can get to it. What many users do, as a matter of convenience they think to themselves, is to map that point to as a local drive. This drive appears like any other drive, C:,D:, or D: drives being common, but using some odd drive letter, such as M:, S:, or T: In this way, the user has only to double click the mapped drive and go to the template. In attaching a template, the mapped drive letter becomes part of the path name. For example, the path might be M:\communications\corporate\companytemplate.dotm.

The problem is that, and it's actually a series of problems, not all other users may have this mapped drive, or mapped the same way. Even if they have an M drive, the entry point may be different such as M:\corporate\companytemplate.dotm, M:\public\communications\corporate\companytemplate.dotm. Bottom lining it, the second user would have the template marked as having a different path. Bottom lining that, this second user won't be able to open that template. Another problem is that Word doesn't warn users that a template isn't being opened; it just won't open it. So unless you know what you're looking for, such as a recently changed style, or an updated macro, you aren't any wiser.

Law One: Always use absolute path name.

This is probably a path like \\corp-1-public\PR\public\communications\corporate\companytemplate.dotm. Long, but everyone in the corporation has the same and correct path.

No copies

This is the second most common violation of my new laws. For some reason, people love making copies of templates and then using those copies. Don't do it. Bad user. Having to mention this one seems like a slap in the face to common sense. Templates are meant to be living documents that can change at any time. By making a copy, team members frustrate this process. The copies never get updated. They even spread as others attach it to new documents. As a result, they can propagate for years, living in a vampire-like twilight, never living and never dying. At best, you lose information. At worse, you make others lose information.

Law Two: Never make copies of templates.

Know if "Automatically update document styles" is checked

This is the most dangerous button known to mankind, at least in a Microsoft Word kind of way. The button is located in the Templates and Add ins dialog (Office button|Word Options|Add-Ins|Templates in the Manage list). If checked, then all the style information is transferred or updated from the template to the document every time the document is opened. If unchecked, then the styles in the document will never be updated. Never.

You can see that sometimes this is a good thing (in the case of a corporate template) and sometimes a bad thing (coworkers modifying their templates and document to show cutsie fonts). Leaving this option on or off is source of debate in the Word community. Opinion leans towards having it off by default. I'm hedging my bets here by saying just be aware of its status. If styles change in unexpected ways, check this first by unchecking it.

Named styles

Word is called a style based word processor. This means each variation of a text, such as plain (also called roman), bold, italic, or combination of those can be given a named style. The Styles panel of the Home tab on the ribbon (also called the Fluent, or Office Fluent) contains the style galleys. Users can pick from a list of existing styles. Using styles allow for visual consistency and convenience. An owner could change the look and feel of a document by just changing the definition of a style, say changing Normal, the default body text style, to an outlandish font. Another reason is that a lot of work mark up applications (such HTML converters, or page layout programs) depend on styles to process those documents.

The problem is that Word itself both encourages and discourages this practice at the same time. By putting the Font panel in the most accessible location, users just select text and apply styling as they see fit, by using bold, or italic. There is no emphasis to name that style. Yes, even bold should be a named style.

Law Three: Always use named styles.

Maintain styles routinely

This is related to using named style. The logical ending of not using named styles is a raging rampage of styles in the document. Even though you don't name them, internally Word does. Open the style pallet (Home|Styles|that little icon in the lower right corner. That pallet shows the named and unnamed styles. Word 2007 has made great strides in controlling this at least in comparison to what had to be a low point for this in Office 2003, although still not moving the Font panel to an inconvenient location, but the problem remains.

Law Four: Manage your styles.

Routinely go into this Style pallet and remove or consolidate loose cannon styles. Replace document instances with a matching named style, even making new ones if needed.

Indiana Jones and the Template of Doom

Our young adventurer may be bold and brave, even impetuous but he certainly isn't stupid. He never took on the corporate world, and with good reason. It's too perilous, and there's much that's still unknown. Take the case of the Microsoft Word templates. It's something everyone uses, if they know so or not, but there's an awful lot of confusion about them.

The template in a way is a contrived solution, which is part of the problem, but it serves two purposes. The first is as a, well, template for creating new documents. That is, if you have a document or form you use a lot and need to use as a starting point, you can design that document once, and save it as a template. In Office 2007 that is a .dotx or dotm, although in previous versions, it's a .doc. Thereafter, double clicking that template creates a new document (in the .doc family) but with all the text, design, and layout of the original.

The second purpose is as repository of styles, macros, and in Office 2007, AutoText and Building Blocks. It's this role that confuses many. Word is considered a style based application. That is, associated with text is the look and feel representation of that text, such as roman, bold, underlined, line spacing, paragraph spacing, and so on. Collectively, that look and feel is called a style. Given the copious number of permutations a glyph could have, it only makes sense to group identical sets and

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name them. In the early days of movable type or lead, these collections were kept in separate bins, typically one set in the higher bin, or literally upper case (get it?) and one in the lower case. Electronics has done away with the physical bins but the concept is still valid. Valid and thriving.

The modern age, that is, since 1986 when the Macintosh and (then Aldus) PageMaker popularized typesetting, terms have gone by the wayside. To be clear:

- A typeface is the collection of all fonts with in a named family.
- A Font is the set of characters of a given style. A typeface may have as few as one font, or as many as ten or more. Fonts include character sets for the different versions each such as roman, bold, condensed, light, medium, and heavy. Varying the fonts is not simply the ability to manipulate them with the word processor's options. For example, you can change a font's glyph by selecting italic from the Font menu, but technically that'd be roman style with italic applied. For true italic, which is usually better looking anyway, you'd have to select that family's italic collection. That level of nuisance gets into the professional typesetter or graphic designer's world.
- A glyph is an individual character. This last term has been historically vague with several meanings, especially within the typesetting community. Western lettering systems can use character instead. Non Western systems should refer to them as glyph, since many do have symbolic representations rather than just character based ones.

Since the Macintosh, font and typeface have become interchangeable and you never hear glyph anymore.

Modern publications absolutely rely on styles. Ask the The New Yorker to change their magazine font and see what happens. Word follows this example and defines everything as part of a style, even if you don't. The irony is that for as much as Word depends on named styles, they do as much as they can to undermine that process. For example, they put character formatting directly on the home ribbon tab. Applying unnamed formatting directly to text is bad practice. Worse yet, is the Belloq, the Blofield, the Siegfried for formatting all rolled into a single face of evil: the Format Painter. This innocuous wand lets you select a style then sweep through entire ranges of text formatting it into an unnamed style minefield. but it's a fact of life and of convenience. Word has only itself to blame.

The two worse offenders of the named style method. Approach these carefully.

All these styles have to be stored somewhere. You can keep them locally in your document but you'd have to reconstruct them each time for different documents. Considering there are not fewer than 40 characteristics a glyph can have, that convenience of using unnamed styles has turned into an inconvenience. The other option is to name the style, thereby saving all the characteristics in a single item, and being able to share that style. Or at the least, be able to recall it. That new found convenience is located in template.

All this seemingly digresses but we can salvage a point here. Every document has to have a template. If you don't explicitly add one, Word applies your local version of Normal.dotx for you. If you delete that, Word creates it for you. It's that fact that causes much of the confusion.

First, just having a template around doesn't help. You have to attach it either explicitly or have the document based on (created by double clicking) that template.

Second, having the template attached doesn't automatically give you access to it. Let's say I have a document based on the default and unmodified Normal.dotx and I send that to you. You are also using the default and unmodified Normal.dotx. The documents will look the same. Since both templates are the default and unmodified Normal.dotx, it's like we're using the

same template. It's that 'like' that causes trouble; remember that for a moment. Chances are one of ours has been modified even slightly. This gets into the tricky part.

Starting over, I have the same document but now I use one of my cool looking fonts. I even name the style Normal, overriding the existing Normal style in the template. I send it you. It looks like I intended it to. But why? The font style is Normal, so you'd think it'd look like you version of Normal. The key is the Automatically update document styles in the Templates and Add ins dialog. This is the key that ruined many an adventure. Few can forget Indiana Jones in the first movie saying "I hate automatically updated document styles, Jock. I hate 'em." And what's the next line said? Regardless, the innocuous checkbox controls the flow of styles from the template to the document; (almost*) never the other way. Your template is (almost*) never at any risk of having the styles change, not at least without your specific action, but for now concentrate on the previous sentence. This concept is an important one and slightly misleading. Styles for a document are never stored in a template; each document is a self contained island of styles; isles of styles if you prefer. Rather, a template is a source, and only a source, of styles. There are only two conditions that styles can be transferred from a template to a document. The first is at the moment a document is created from a template, and the second is when you explicitly transfer or update style information, which is what we're talking about here.

The Templates and Add-ins dialog. The Automatically update document styles is the root of all evil, at least in the Word regard.

Just getting to it is tough, too. Click the Office icon|Word Options|Add ins, Templates (from the Manage dropdown). Click OK.

Stated another way, if you attach a template with this option unchecked, none of the template styles will be available to the document. It's not until you check it does the document update, and yes my cool style would in fact look fabulous. The trouble is, this option is a two edged sword. You sometimes want it check and you sometimes don't. But since the option is persistent, that is, sticks around from session to session, the next best thing is to understand how it works. This goes for both the sender and receiver.

For example, as the sender, I should know better than to create a fabulously cool looking style with the same name as another style already in the template. I could name it RobertsFancyHeader. It's not only unlikely you have the named RobertsFancyHeader style in your Normal.dotx but also sorta creepy if you did. By doing so, any document I send with RobertsFancyHeader will never, ever be replaced and you get to see it exactly as I intended it.

On the other hand, if you always have Automatically update document styles checked, understand that once a while it's going to corrupt, yes I said corrupt, a document. So should you have it on or off? If you figure that one out, tell me too. In a corporate setting, it's probably better to keep in on; the powers that be could change their company's graphics and font styles without telling anyone. And what was the next line said? "C'mon, show a little backbone, will ya." Enough said. At home, it might be better off by default.

Third, use one template. Recall a moment ago that using similar templates are 'like' using the same one. Well, it's not. Don't ever make copies of a template and use the copy. The whole idea of a template is that the company only has to change the boring Normal styled font to my cool looking fabulous one once. In theory that could change every occurrence of the style in all the documents (at least on first subsequent opening). That and have Automatically update document styles checked.

* Funny story here but that's another article.