HELP! for templates

**Taming Templates by Nate Keyes**

**A template can't become all you want it to be if you find yourself befuddled by how to personalize it. What can you do about a seemingly untamable template? Fear not. Help is on the way.**

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| **Applies to...** | **In...** |
| Microsoft Word Microsoft Excel Microsoft PowerPoint | Microsoft Office 2003 Microsoft Office XP Microsoft Office 2000 Microsoft Office 97/98 |

Hello, template compatriots. I say this kindly but frankly: it’s about time you sought help. I know, I know… “Doctor, heal thyself.” Well, in my opinion I am quite well-heeled, thank you very much. Those shock collars are a wonder. As for following my own advice, people tell me almost daily to seek help, and I can’t help but giggle when they say that because they don’t realize my invisible friend tells me to ignore them.

But enough about that. Let’s talk about template help. The helpfulness of any helper is, as you know, tied to the helper’s capacity to understand exactly how to be helpful. For instance, you may find this yammering very unhelpful.

Or here’s another example. When I had house guests for a seemingly interminably long time during the holidays, I knew exactly how to help them. And I’m sad to report that my house guests started taking advantage of my accommodating spirit with their complaining.

First, they began whining about the guest room with none–too–subtle comments like, “Can you let us out,” and “It’s hard to breathe in here.” What next? Run the entire house their way? Then they started muttering about my meals. At least, it sounded like muttering, coming, as it was, through the door. Stuff like, “We need more than just bread and water.” Oh, but here’s the kicker. You'll love this. They then started playing the semantics game—you know—making an issue about what this word or that word really means and trying to turn it all to their selfish advantage. I could almost see one of my guests using his hands to make quote marks in the air when he said through the door, “Mold is not a ‘food group’.” Like he’s a nutritionist! The idea! I know. I thought it was unbelievable too.

I’m not telling you all this to get you to feel sorry for me, or to toot my own horn about my generosity and instinctive helpfulness despite being burdened by ingrates. My point is, sometimes offering help, and therefore getting help, is really easy because the need is so obvious.

**The big challenge about getting good help**

But what if the need isn’t so easy to pin down, like when you are trying to do something very specific in Excel that’s hard to describe? For instance, “I want to make a list of days starting with January 1, 2006, putting the next day on the row below it and so on, without typing out each date by hand.”

It reminds me of a time I tried to describe to a mechanic what was wrong with my car by imitating the noise it was making, knowing all the while that my grunts and gurgles didn’t sound anything like my car’s problem. Much more like an ailing copy machine. The mechanic just looked at me as though a little lost and said, “Did… did you check the toner?” I rolled my eyes and said, “The toner! Don't you recognize a cracked primary feed spindle when you hear one? He-LLO!”

But you distract me from what I’m trying to say, which is: The stumbling block to getting the help you need comes down to, well, semantics. It’s about vocabulary, about language, about bridging the gap between the way you describe the problem and the name of the feature in Office that solves it. “In Word, I want to move this paragraph so that it starts on a new page.” If you searched Help in Word using this question, a list of a couple dozen or more files come up in the results. Would you know that your solution is covered by the Help topic *Insert a manual page* break?

Well, I—along with so many others here behind this firewall—am determined to change all that. We’re taking strides, particularly with Office Online templates, to close the communication gap between your help needs and Microsoft help solutions. Here are four key ways to discover the Help that is just right for you.

* **Personalized template help.** To learn about this option, click [here](http://office.microsoft.com/en-us/assistance/HA011592451033.aspx?mode=print#HelpOption1of4#HelpOption1of4).
* **Training courses from the Training site on Office Online.** For more about this option, click [here](http://office.microsoft.com/en-us/assistance/HA011592451033.aspx?mode=print#HelpOption2of4#HelpOption2of4).
* **Office Online video demos.** To find out more about this option, click [here](http://office.microsoft.com/en-us/assistance/HA011592451033.aspx?mode=print#HelpOption3of4#HelpOption3of4).
* **Free technical support solutions to Office application questions.** To see what this option is all about, click [here](http://office.microsoft.com/en-us/assistance/HA011592451033.aspx?mode=print#HelpOption4of4#HelpOption4of4).

**New in Office 2003: personalized template help**

If you have Microsoft Office 2003, many templates for Word, Excel, and PowerPoint that you download from Microsoft Office Online come with Help tailored specifically for them. These personalized Help topics, which appear in the Template Help task pane, help you discover and master powerful Microsoft Office 2003 features. *“The Template Help what where?”* you may be asking. I know that simply repeating the term won’t make it any clearer, but that’s what they always do on TV and in the movies: “Why yes, the Template Help task pane.”

In the technical jargon of the software industry, the Template Help task pane is a thingamabob. You know: a doohickey. It appears in Word, Excel, or PowerPoint along the right side of the window and lists all kinds of great, um… helpy stuff.

To be specific, when displayed, the Template Help task pane can tell you what features are used in the template that you just downloaded. It can also tell you how to put those features to work to get the results you want. And it can point the way to other helpful resources such as training, similar templates, and any number of useful Web sites in Microsoft Office Online and beyond. Very cool, indeed.

**Displaying (or for that matter turning off) template Help**

To display the Template Help task pane when you download a template, do the following.

1. In either Microsoft Office Word 2003, Microsoft Office Excel 2003, or Microsoft Office PowerPoint 2003, click **Options** on the **Tools** menu.
2. On the **General** tab, click **Service Options**.
3. Click **Online Content** in the **Category** pane
4. Now do the thang you came here to do:
   * To activate the Template Help task pane, check the **Show Template Help automatically when available** check box.
   * To deactivate the Template Help task pane, clear the **Show Template Help automatically when available** check box.
5. Click **OK**, and then click **OK** again.

You will not immediately notice anything different, but I tell you, with the next template you download that has template Help, the Template Help task pane will appear. You may also find that your breath stays mintier longer, that kitchen spills clean up in a snap, and that beverages are just a tad more refreshing than before. Nothing is quite as pleasant as a refreshing beverage. “Thank you, Template Help task pane! Thank you!”

**Turn off template help for a particular document  
(so you don’t distract your reader or embarrass yourself)**

“Well Nate,” you may be saying, “I love the idea of seeing template Help when I download a template, but I’ve already created my document so I don’t want to see the Help anymore for this one. And I certainly don’t want it to open for others I send my document to.” If this indeed is what you are saying, please seek professional help. Talking to people who aren’t really there can’t be a good sign. If, however, you were *thinking* this, I thoroughly agree with your concern. And yes, you can rest assured that I am indeed talking to you.

To turn off template help just for a particular document, do the following.

1. In Microsoft Office Word 2003, Microsoft Office Excel 2003, or Microsoft Office PowerPoint 2003, open your document.
2. Click **Properties** on the **File** menu.
3. Click the **Custom** tab so that it’s the tab on top.
4. In the **Properties** list, in the **Name** column, click the text **\_TemplateID**. Doing so selects it.
5. Click the **Delete** button. The **\_TemplateID** property you selected disappears.
6. Click **OK**.
7. Save your document.

After closing this document, the next time you open it the Template Help task pane won’t open.

**The Training site on Office Online**

“An ounce of prevention is worth a pound of cure.” There certainly is something to that old adage: namely, 17 ounces (if you add the ounce and the pound together). But I just realized—and I now magnanimously share my insight with you—that this silly and useless formula for a rather obscure amount of weight can also be viewed metaphorically. I know: it’s a wild idea. But if you think about it, a little up-front knowledge about using a template can prevent you from having to encounter a whole host of problems down the road. And that’s where the Office Online Training site comes in handy.

Ah, yes, the Training site, which, incidentally, you get to by clicking **Training** along the left side of the Office Online Web site. The Training site has oodles of great online courses that not only tell you about helpful features in Microsoft Office, they also give you plenty of opportunities to practice those features right in the courses. Here are just a few course titles to whet your appetite.

* Help secure and protect data in Excel
* Use mail merge in Word for mass mailings and more
* Design PowerPoint presentations efficiently with masters

In as few as 30 or 40 minutes, you can master some pretty cool features. Once you drink to its dregs the sweet nectar of this new knowledge, your templates will have no choice but to bend to your iron will. Or alternatively, to your stainless steel will (for those of you in coastal regions where corrosion can be a problem).

**Office Online video demos**

“Oh for crying out loud, Nate. I don’t have no stinkin’ 30 or 40 minutes to lollygag over Office features!” Well, you’re reading this column, aren’t you? Hmm… I guess that doesn’t count. It only feels as though you’ve been reading this for 30 or 40 minutes.

Okay then, can you spare four to seven minutes? Is that a short enough period of time for you? Hmm? Because we’ve got some rip-snortin’ video demonstrations that offer a bird’s eye view of Office features in action, and all that without the impracticality of trying to fly on the back of a bird. “And how, I pray thee do tell, mayest I find these demonstrations?” Well, Shakespeare, just click **Assistance** along the left side of the Office Online Web site, and then click **See Office demos** along the right side.

**Free technical support solutions to Office application questions**

“Is there any way I could get free technical support for Microsoft Office?” You bet your sweet bippy! Well… sort of. You can benefit from the Office product support that others receive when they call in for help by using a free Microsoft online library called the *Support Knowledge Base*. Don’t let its cryptic name intimidate or fool you. A better name would be *Tried and True Answers to Customer Questions*. Because that’s exactly what the Support Knowledge Base is.

It goes like this: After solving a problem that a customer has sent e-mail about, or submitted by filling out an online form on the Web, or called in using a good ol’ telephone, the friendly people in Microsoft Product Support Services often create a document describing in detail the customer’s issue and the solution that fixed it. They then add this document (or article, as they call it) to the Knowledge Base. These articles are frequently (and affectionately) referred to as *KB articles*. Chances are, the problem you’re having is described and solved in a KB article, which means the help you need is now in the Support Knowledge Base waiting patiently for you to discover it.

**To find a solution in the Support Knowledge Base**

The Support Knowledge Base page I’m pointing you to has instructions for how to search for a solution, but I’m going to give you the essentials right here so that you don’t have to wade through all the information on that page. So…

1. Go to the Support Knowledge Base Web site by clicking [here](http://office.microsoft.com/search/redir.aspx?AssetID=XT012002551033&CTT=5&Origin=HA011592451033).
2. In the **Search Product** box, select the Office program you’re trying to find an answer for.
3. In the **For** box, type the words you expect to find in the pages that contain your answer. They should be words that describe the problem or the exact error message. You can skip using words like “the,” “in,” or “on.”
4. In the **Search Type** box, I recommend sticking with **Full Text**, which searches the whole article. But if you’re searching for a particular error message, select **Error Message**.
5. In the **Using** box, I’d use **All of the words entered**, which collects just those articles that have all those words. But if, in the **For** box, you typed a specific, word-for-word phrase, then click the **Using** box and select **The exact phrase entered**.
6. That ought to do it. Now begin the search by clicking the right-pointing arrow located a little down and to the right, just before the headline **Advanced Search Options**.
7. Once the search results appear, you’ll have to wade through them, reading the descriptions to see if any of them describe your issue. When you find an article that looks hopeful, open it by clicking its title.

**Let’s review**

Sure you can find other ways of getting assistance for Microsoft Office, but I've presented you with four alternatives that can quickly take you far in your quest to tame your template. Here they are in a summarizificated formulatiacity:

* Template Help task pane in Office 2003 offers help that describes the features that your opened template uses. This approach gives you an edge in finding help related specifically to the template you are using if you need it.
* The Training site offers courses that place you well on your way to mastering Office features, solving untold numbers of problems before they ever have a chance to arise.
* Office demo videos give you quick, hands-on information about how to use various features in Microsoft Office.
* KB articles from the Support Knowledge Base provide real-world solutions for real-world problems that people have reported. Chances are that you can find the solution to your problem in a KB article.
* *Summarizificated* and *formulatiacity* are not actual words.

**Next time**

Bigfoot. The Loch Ness monster. Elvis. You can add yet another creature to these celebrities of crypto zoology: The downloaded template. Sure, a new document based on it opens up at the end of the download. But what about the very template itself that generated that new document? I'll crack that mystery, next time.

Until then, I leave you to mull yet another template haiku.

Budding, the template  
opens, each change a petal  
You're the template Spring

**Let me hear from you!**

Which of the following statements best describes your thoughts? Feel free to respond to one or both of the following choices.

* **I want to leave quick feedback stating whether this column was helpful or not helpful.** Please click either the **Yes** or **No** button at the end of this column.
* **I want to leave a compliment, comment, or offer a suggestion for a future edition of this column.** Please click [tmpltcol@microsoft.com](mailto:tmpltcol@microsoft.com?subject=). This link allows you to send me an e-mail that you can make as detailed as you wish.

**About the author**

Nate Keyes (which rhymes with "State prize") is a columnist, content programmer, and technical writer for the Office Online Templates site at Microsoft. This column is the first that he has written in some time, and he’d like to explain why by starting with “it’s a long story.” But in good conscience he cannot for it is, quite actually, a short story. And since the Templates site publishes columns and articles but not short stories, the explanation for his long, deafening silence shall remain a mystery.