

GSD. Word – How to Save and Use a Custom Word Template

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General Information:

Possible symptoms/errors:

How to Save and Use a Custom Word Template

Alternative names of the system:

N/A

IMPORTANT NOTICE:

N/A

Solution:

A template lets the user configure all the relevant settings they want pre-applied to documents. It helps the user if they are frequently creating a specific document and prevents the user from recreating the file from scratch each time they need it. This article shows a guide on how you can save and use a Word document as a template in Microsoft Word.

Details:

A. Save a Word document as a template

1. Once the user created a document which they want to create as a template, advise them to click on File tab then click Save As.
2. Under Save As, tell the user to select Browse.
3. Advise the user to select where they want to save their document.
4. After the user typed a name for the template, ask them to open the dropdown menu underneath the name field, and then choose the Word Template option.
5. Ask the user to click the Save button.

B. Use template to make a new document

1. Advise the user to Click on File to start a new file based on their template.
2. Then tell the user to click New.
3. Ask the user to click Custom and then to select Custom Office template.

4. Advise the user to select their template.

Note: By default, Word likes to save templates to Documents\Custom Office Templates, where they will show up alongside templates you create in any other Office app.

Assignment Group:

3rd Party e-mail address: One365Support@freseniusmedicalcare.com

Ticket Creation:

Template: N/A Categorization:

Configuration Item: N/A Category: N/A Subcategory: N/A

Important Links:

N/A