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## Using Flinders University Templates

To use the Flinders University Templates you first need to save it to your computer. We recommend you create a folder to save your templates to.

### Creating a Folder to store Templates

1. Click on the Start menu button and navigate to your My Documents or Documents Folder.
2. In your Documents folder create a new folder called Templates
3. Save it on your computer

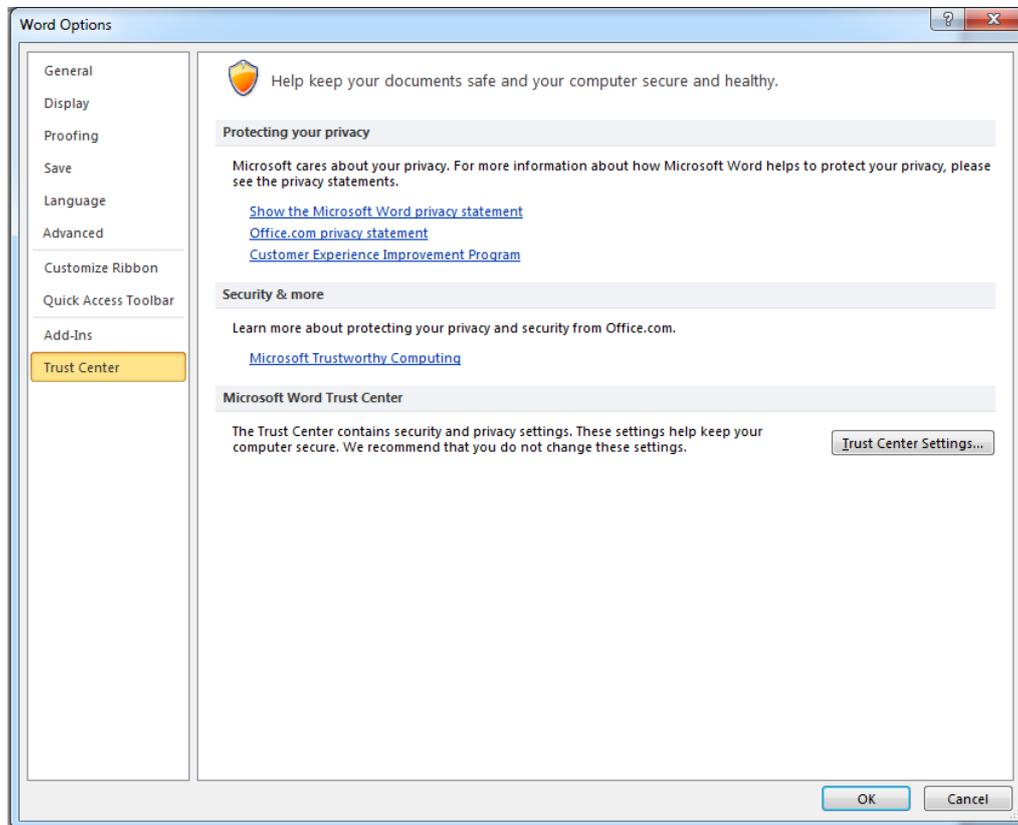
### Downloading the template

1. From the Flinders Press website, right-click on the link to the template
2. Choose 'Save Target As...' or by clicking on the link and choosing 'save' when prompted
3. Browse to the Templates folder you have just created and save them in there.

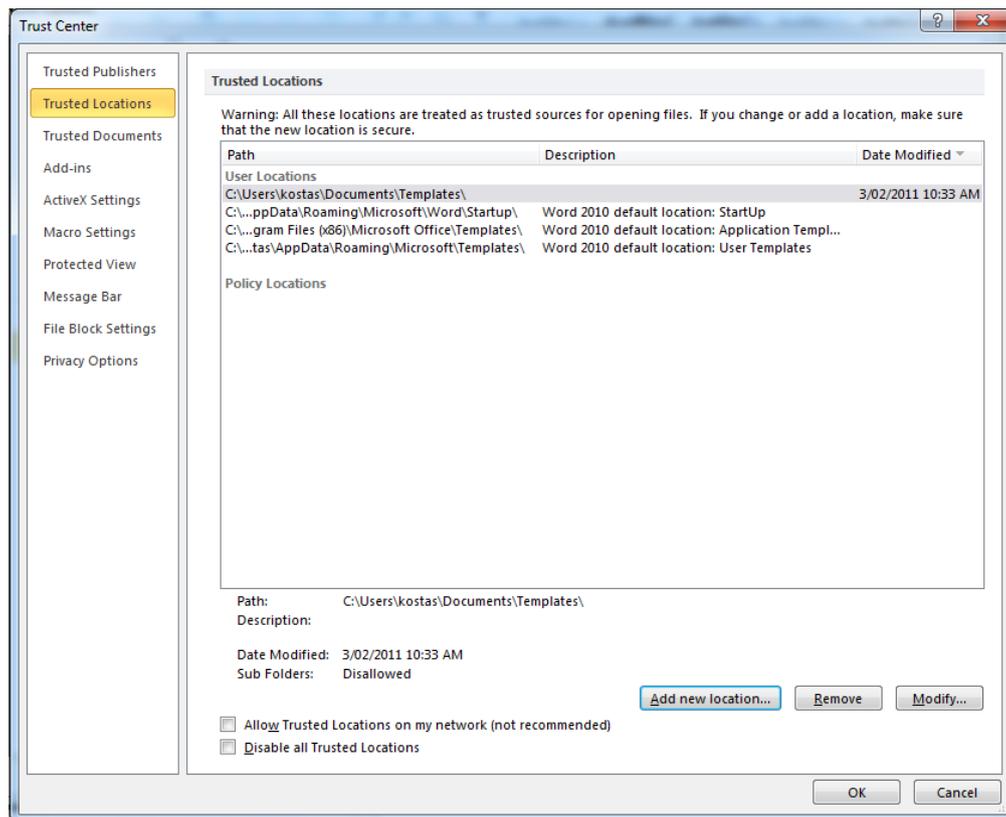
The template file is saved as the file type 'Document Template', which has the file extension .dot (so the file name is Certificate Template.dot). Any document that you create using the template will be created as a Microsoft Word Document with the file extension .doc (eg. Xxx.doc)

## Setting up Microsoft Word 2007 and 2010

1. Open Microsoft Word
2. **Office 2010** - Select File >Options  
or  
**Office 2007** - Select Office button>word options
3. Select Trust Center and then Trust Center Settings



#### 4. Click Trusted Locations and then Add New Location



5. Select the Browse button and choose the Template Folder you created (instructions above)
6. Click OK>OK>OK
7. Now exit Word via File>Exit.

### Creating a document from the template

1. Go to the location where the template is saved on your computer
2. Double-click to open it, and the desired template will start

*Don't use the File Open command as this will open the active template rather than creating a new document from the template.*

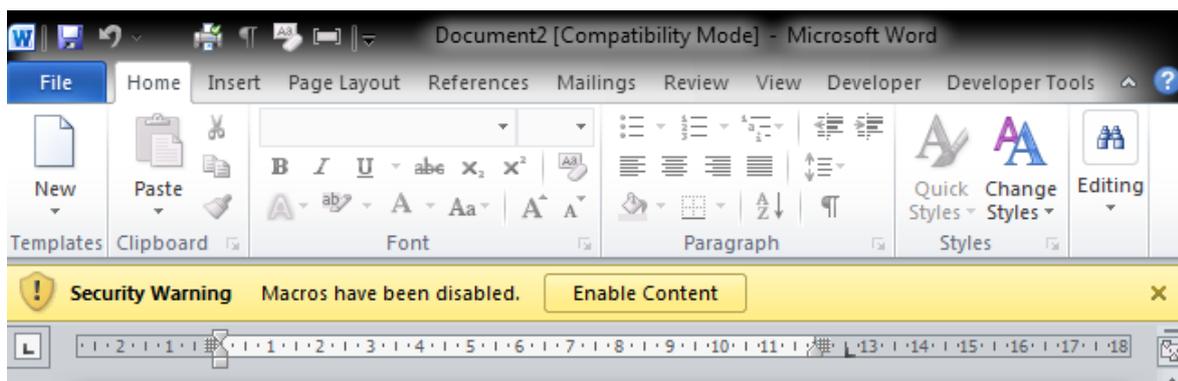
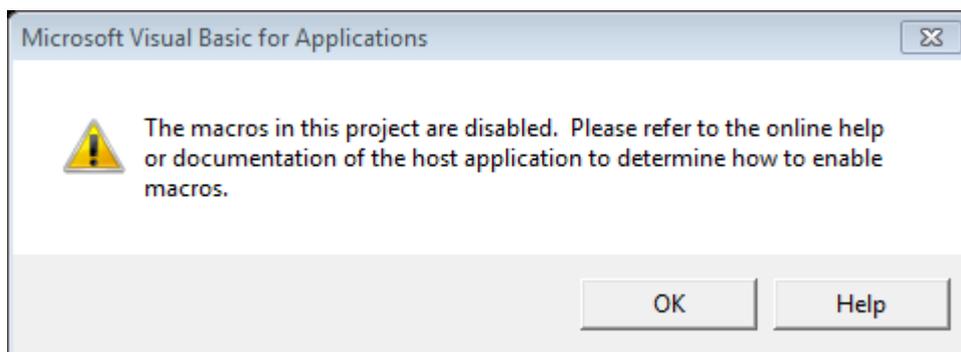
## Security settings

The most common reason for the template not working on a computer is because of security settings. These instructions tell you what to do if you receive a warning message, or if you open the template and nothing happens.

The Word template contains macros. Macros are what make the actions in the file work (for example running the wizard in this template). They are vital for the use of the Flinders University Templates.

Security settings on your computer determine what happens when you open a document. When opening a document based on the template, if your macro security settings are set to Medium or High, you will be warned that the document contains macros.

The first time you open a template you will see one of the 'Enable Macros' security warnings that are shown below.



To be able to run the macros in the Flinders University Templates, you should select

### Office 2010

1. On the Message Bar, click Enable Content.
2. The file opens and is a trusted document.

Another method to enable macros in a file is via the **Microsoft Office Backstage view** when the yellow Message Bar appears.

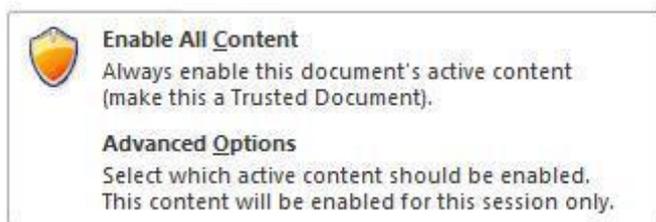
1. Click the **File** tab. The **Backstage view** appears.
2. In the **Security Warning** area, on the **Enable Content** button, click the **down-arrow**.

3. Under **Enable All Content**, select **Always enable this document's active content**.
4. The file becomes a trusted document.

The following image is an example of **Always enable this document's active content** and **Advanced Options**.



The following image is a larger example of the **Enable Content** options.



Use the following instructions to enable macros for the duration that the file is open. When you close the file, and then reopen it, the warning appears again.

1. Click the **File** tab. The **Backstage view** appears.
2. In the **Security Warning** area, on the **Enable Content** button, click the **down-arrow**.
3. Select **Advanced Options**.
4. In the **Microsoft Office Security Options** dialog, select **Enable content for this session** for each macro.
5. Click **OK**.

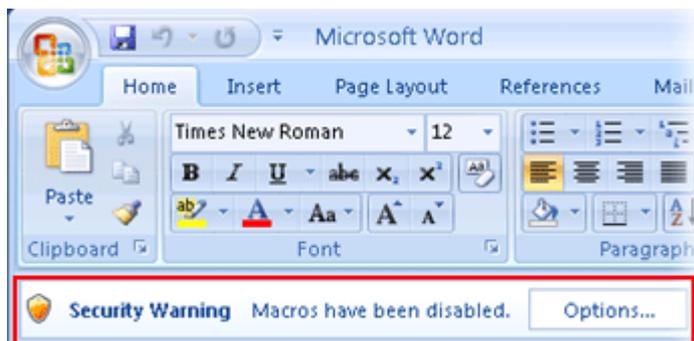
The following image is an example of the **Security Options** dialog for a macro.



6. Click OK to save your setting.

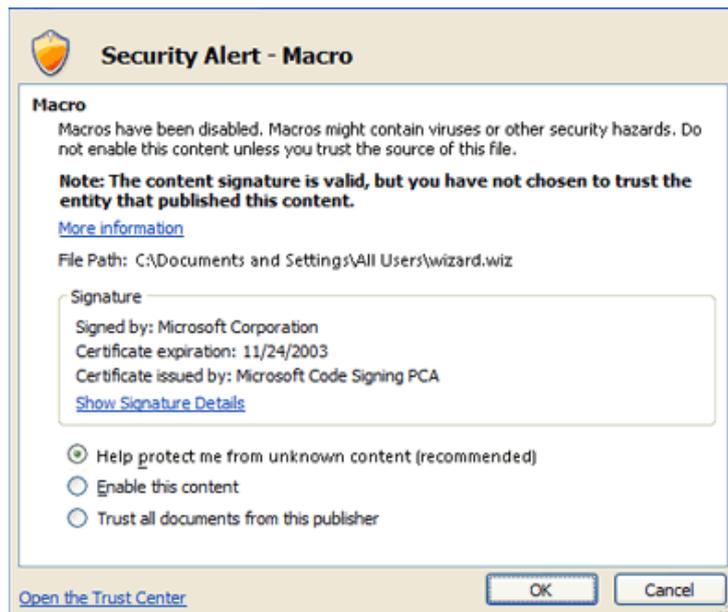
## Office 2007

If the Trust Center detects a problem with any of these, the macro is disabled by default, and the Message Bar appears to notify you of a potentially unsafe macro.



1. On the Message Bar, click Options.
2. Select Trust All Documents From This Publisher.

3. Click OK



## Certificate Template

### Template Use

The Certificate template is used to create the following certificates:

- Certificate of Participation
- Certificate of Achievement
- Certificate of Completion
- Certificate of Presentation
- Prize Certificate
- Certificate of Appreciation
- Award Certificate
- Certificate of Attendance

### Selection Form

Once the Certificate Template has been selected using the method outlined in 'Creating a document from the template' or 'Downloading the template', the following form will be displayed:

The screenshot shows a web form titled 'Award' with the Flinders University logo at the top. The form contains the following fields:

- Certificate Type: A dropdown menu.
- Sponsor Image: A text input field with a browse button (...).
- School / Department: A text input field.
- Name: A text input field.
- Certificate For: A text input field.
- Certificate Description: A text input field.
- Month: A dropdown menu showing 'January'.
- Year: A text input field showing '2015'.
- Signatures: A dropdown menu showing '1'.
- Signature 1 Image: A text input field with a browse button (...).
- Signature 1 Name Block: A text input field.
- Footer: A text input field.

At the bottom left, there is a small box with the text: "Enter details in the text boxes below. Press TAB to move between fields. Click 'OK' when finished." At the bottom right, there are 'OK' and 'Cancel' buttons.

The following is a description of the data entry field displayed on this form.

### Certificate Type

This is used to select the certificate. This field must be selected.

### Sponsor Image

Select an image or logo to appear in the top left for a sponsor. This field is optional

### School/Department

The school or department the certificate is for. This field is optional.

### Name

The name of the individual receiving the certificate. This field is optional.

### Certificate For

This field is for the name of the award or certificate that is being created. This field is optional.

### Certificate Description

In the certificate description additional information can be entered describing details of the award. This field is optional.

### Month

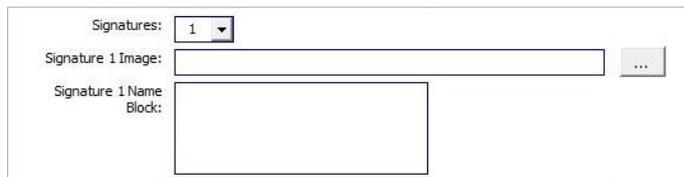
The month can be selected and displayed on the certificate. This field is required.

### Year

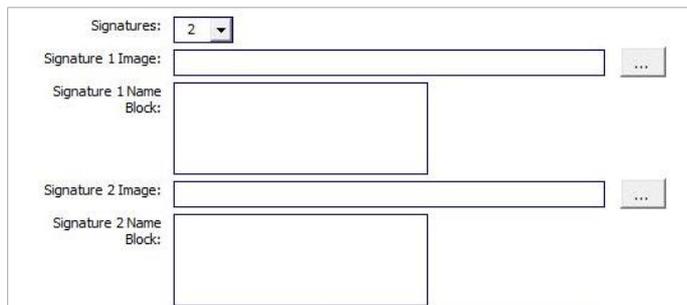
The year can be selected and displayed on the certificate. This field is required.

## Signatures

The template has the option of 1 or 2 signatures. Using the dropdown box this choice can be made. When 2 signatures is selected, the signature information is repeated so that 2 different signatures can be included.



A screenshot of a form for configuring 1 signature. At the top, there is a dropdown menu labeled "Signatures:" with the number "1" selected. Below this, there are three input fields: "Signature 1 Image:" with a text box and a small button with three dots to its right; "Signature 1 Name:" with a text box; and "Block:" with a larger text box.



A screenshot of a form for configuring 2 signatures. At the top, there is a dropdown menu labeled "Signatures:" with the number "2" selected. Below this, there are six input fields arranged in two groups. The first group includes "Signature 1 Image:" (text box with a three-dot button), "Signature 1 Name:" (text box), and "Block:" (larger text box). The second group includes "Signature 2 Image:" (text box with a three-dot button), "Signature 2 Name:" (text box), and "Block:" (larger text box).

### Signature 1/2 Image

Select the signature image to use for each signature. This field is optional.

### Signature 1/2 Name Block

Enter the details of the person the signature represents. This can be entered as multiple lines. This field is optional.

### Footer

Entry of any additional sponsor, school or award information can be entered here, this field is optional

All of the values for these fields, except the name field, are stored and appear as default values the next time the template is run.

## Certificate Completion

Once **OK** is clicked, the certificate will be created. The finished certificate is created as a normal word document. As such, it can still be edited as a normal document e.g. the finished certificate can have additional details added to it and saved or can be used as a mail merge document, eliminating the need to have to create certificates for each individual separately.

## Mail merge using an Excel spreadsheet

When you run a mail merge, Word pulls names, addresses, and other information directly from your Excel spreadsheet into the email messages, labels, envelopes, or documents you're creating. The merge runs more smoothly if all the information you want to include is ready—so, the first step is to make sure:

- The columns in your spreadsheet match the fields you want to use in your merge.

For example, to address readers by their first name, make sure you have separate columns for first and last names. If you want to sort by city, be sure you have a separate City column.

- All the data you want to merge is in the spreadsheet.

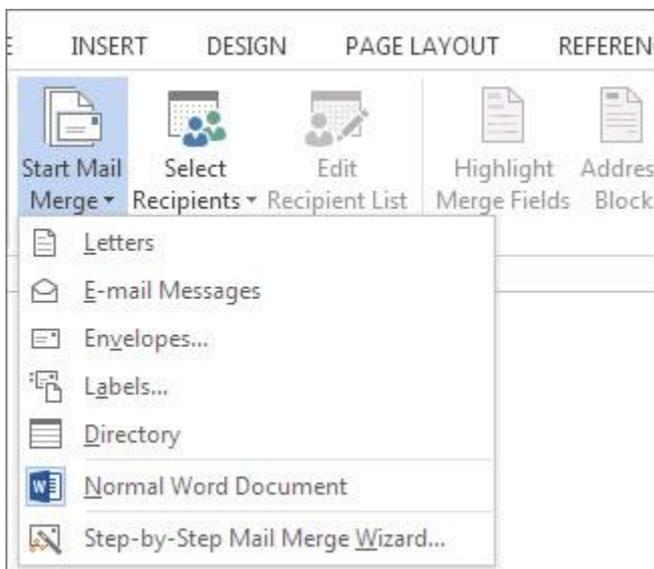
If you want to add more names or other information, it's best to make those changes now—before you start the merge.

- Number formatting won't change.

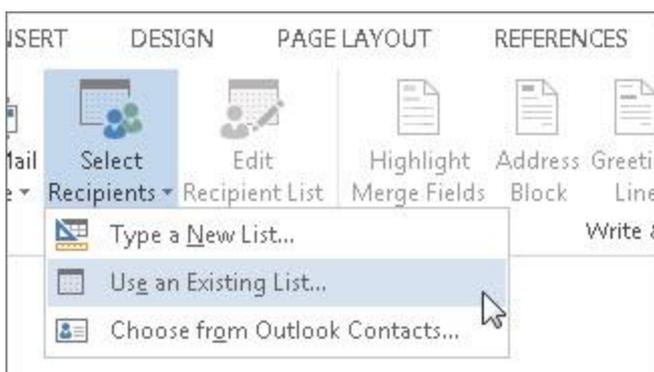
Make any changes or additions in your spreadsheet before you connect it to your mail merge document in Word.

When the data's ready, start the mail merge

1. In Word, make sure you have the certificate open.
2. Place your cursor where you wish to inset the name.
3. Click **Mailings > Start Mail Merge**, and then click the kind of merge you want to run.



4. Click **Select Recipients > Use Existing List**.

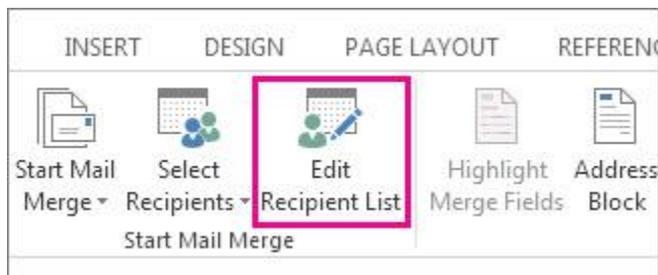


5. Browse to your Excel spreadsheet, and then click **Open**.

If Word prompts you, select **Sheet1** (or the name of you wish to use) and click **OK**.

Now the Excel spreadsheet's connected to the mail merge document you're creating in Word.

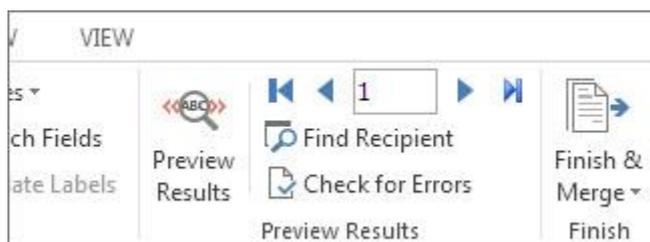
To include only some of the people or items from your spreadsheet, click **Mailings > Edit Recipient List**.



The **Mail Merge Recipients** box opens. Here, you can select just the rows you want to include. To make them easier to find, you can sort and filter the information.

Next, you can insert mail merge fields that pull the information from your spreadsheet into your document. For example, to add a student's name, click **Mailings > Insert Merge field**.

- When your document's ready, click **Preview Results** and click the arrows to see each specific copy of the document.



- To finish the merge, click **Finish & Merge**, and then click **Print Documents** or **Send E-mail Messages**.

