Leveraging Microsoft® Word® Styles – Applied TAM

SESSION HANDOUT

APPLIED NET
CLIENT NETWORK CONFERENCE
www.appliednet.com

Prepared for Applied Systems Client Network and Applied Systems

Applied Systems Client Network
2340 South River Road
Des Plaines, IL 60018
Phone: 800-605-1045
Fax: 224.220.1443

Applied Systems, Inc.
200 Applied Parkway
University Park, IL 60484
Phone: 708-534-5575
Fax: 708-534-8016

Copyright © 2010, 2011, 2012, 2013, 2014 by AB Solutions, Inc., 7211 Haven Ave. #E 283, Rancho Cucamonga, CA 91711. Protection claimed in all forms and matters of copyrightable material and information now allowed by law or hereafter granted including both electronic and conventional distribution of herein products. All rights reserved. Specific product information regarding Applied TAM®, Vision®, Epic® and related products and services, including any related manuals, documentation, and/or materials prepared by Applied Systems are the exclusive property of Applied Systems, Inc. Information relating to products and services owned or licensed by third parties (ex: Microsoft, Excel, etc.) and all interests therein are the property of the respective owners, and no endorsement or ownership of third party products or services should be implied by their mention and use. All workflows are suggested and common workflows. Users of this material agree that AB Solutions, Applied Client Network and Applied Systems cannot be held liable for any omissions or errors within the guide.

Original Author:

Marcia Priest, CIC

AB SOLUTIONS, INC
AGENCY OPERATIONS CONSULTING

8/9/10

Updated By:

Renee Foo	AB Solutions, Inc.	August 2015

Target Audience:

	Accountant/Bookkeeper		Producer
	CSR		Trainer
	Carrier		Vendor
X	IT Manager/Systems Coordinator		ALL
X	Operations	X	Other: Document Setup Specialist
	Principal/Owner		

Table of Contents

Styles – In General 6
Quotes 6
What it means for your agency 6
Style Types 6
What do Styles do for you? 7
Style Types 7
Paragraph Styles 7
Character Styles 7
Linked Styles 7
List Styles 7
Table Styles 7
What if you change your branding? 8
Tips for Creating Styles 8
Styles to create – suggestions 8
Creating Styles – Step by Step 9
Applying Styles 12
Copying Styles – Step by Step 14
Paragraph Style Notes 16
Table of Contents Creation 16
Utilizing Navigation Pane Options 18
Replacing Styles 19
Table Styles 20
Why use Table Styles? 20
Things to know about Table Styles 20
Table Style “Challenges” 21
Tips for Creating Table Styles 21
Table Styles to create 22
Creating Table Styles – Step by Step 23
Reminder Notes on Table Styles 26
Additional Styles Notes 26
Appendices 27
Appendix A – Inserting Tables – Step by Step 27
Appendix B – Copying Documents into Applied TAM without breaking fields 28
Data structure for document storage 28
Step by Step: 28
Appendix C - Other Classes and Handouts from the Proposal Track Series 30

Seminar Type: IT, Microsoft Products, Servicing & Workflows, Training & Staff Development

Seminar Level: Intermediate: An Intermediate level class takes the concepts originated from a basic level course, and adds more layers or parallel concepts. For functional courses, these classes will require the participant or attendee to have some basis to work from as they are learning new facets of the agency management system or software program.

Class Description:
Using the previously installed proposal set, this intermediate session will demonstrate what Word Styles are, what they can do, and how to use them to create consistent document templates. Discover the possibilities of how Word Styles can make life easier!

Learning Outcomes:

- Create your Agency's unique Word styles and deploy them throughout your document and proposal templates
- Improve the consistency of the agency standard and the "look and feel" of all documents
- Reduce editing time of merged documents and provide tools to make necessary edits easier.

Assumptions: This seminar is based on the following
Applied TAM 2015
Microsoft ® Word Version 2010, 2013

Styles – In General

Quotes

“If you're concerned about whether or not you need to learn styles, we can put it rather simply: you do. Styles are the architecture upon which Word is based. Just about everything in Word is style-driven. In fact, many people in the industry refer to Word as a "style-driven" program.

If you create document templates with direct formatting, you deserve what will happen to you when someone finds out (and it won't be nice). In my opinion, using direct formatting in document templates intended for use by others rates the words malicious and/or incompetent. If the templates are for your own use, you deserve the loss of days, months, even years from your life that you'll spend fighting with Word and trying to figure out why your documents look so bad.” *Author unknown*

“If there is a problem with your documents where they are acting “weird”, “It’s the Styles, it’s always the Styles!” ©Todd Arnold, AB Solutions.

What it means for your agency

Simply put, any document setup personnel in your office need to understand and employ Word Styles to improve efficiency for your staff creating proposals. This is particularly true of Proposal templates where Microsoft Word and the Applied Word Interface take control of documents especially containing the default styles of “Normal” and “Body Text”. Though not quite as necessary in Document or Attachment templates, if you have Styles set for Proposals, why not deploy them throughout all of your documents?

Having a good set of standard Word Styles will make the output of document templates standard across all workstations, versions of Microsoft Word, versions of your Applied Systems product, and presents a uniform “look and feel” for your agency’s branding philosophy.

Styles when created in your templates will “travel” through to the finished merged proposal. A good proposal set will have NO styles other than those you have created within your templates.

Style Types

There are five main types of styles that can be created within Word. The primary style to be concerned with in Applied TAM, Applied Epic and Applied Vision documents and the main focus of this class is the Paragraph Styles, but the others offer interesting possibilities as well:

- Paragraph ¶. Applies to all the text within the end paragraph mark of where your pointer is positioned.
- Character a. Applies at the character level—to blocks of words and letters.
- Linked ¶a. Applies to both paragraph and character styles to either blocks of text or individual words.
- List. Provides a consistent look to lists.
- Table. Provides a consistent look to tables.

What do Styles do for you?

Style Types

Paragraph Styles

A good set of paragraph type styles will control:

- Font type, size and color of font defaults
- Bold, underline, and italicization
- Left, right, center alignments and justification
- Line spacing and indents
- Outline levels (for creation of Navigation Pane features and Table of Contents)
- Borders and Shading
- Tabs
- Language
- Frame
- Numbering

Character Styles

- Allow for control of particular blocks (rather than lines) of text similar to paragraph styles

Linked Styles

- A linked style behaves as either a character style or a paragraph style, depending on what is selected. If you click in a paragraph or select a paragraph and then apply a linked style, the style is applied as a paragraph style. However, if you select a word or phrase in the paragraph and then apply a linked style, the style is applied as a character style, with no effect on the paragraph as a whole.
- Because of the Table of Contents and Document Navigation tools that become available with use of Styles, as well as copying and pasting that happens once templates are merged, it is suggested that only paragraph styles be used in template setup.

List Styles

- Customization of how numbered or bulleted lists will create
- Custom bullet symbols and/or color selection
- Layers and levels of indent and priority up to nine deep for multi-level lists

Table Styles

- Customization of lines and borders that can be easily applied to any table created
- Header rows of tables can be defined separately with customized colors
- Color banding with alternating rows of color can also be employed to a certain extent

What if you change your branding?

If you change your branding philosophy or simply want to change the look of your proposals from one year to the next, it is a simple process to update the Styles in one document, then go through and copy the styles into each of the other documents in your proposal set. The change in the text will appear in the template immediately so long as each document is using your standard set of styles on every line. The next time a proposal is merged, the colors could go from (for example) blue to magenta with only minor work on the part of the document setup specialist.

Tips for Creating Styles

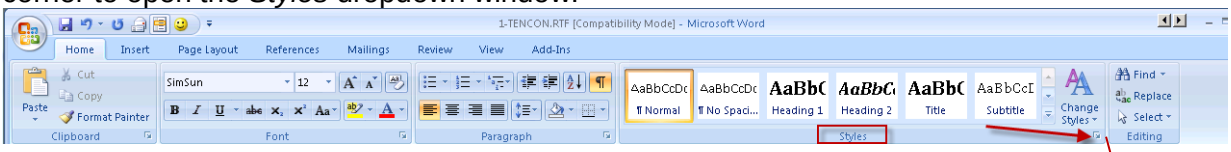
- Group your styles set together by using a number or a common letter at the beginning of each style name
- Be consistent with naming format including dashes, spaces and any other consistent coding
- Create the “normal” or “body text” style first
- Choose a name that is meaningful for where it will be used, rather than using the font selection in the title
- Create any heading styles using Borders and Shading rather than having them as part of a table. Styles within Tables are not found with Table of Contents or Navigation pane options.
- If creating styles in an existing set of documents, create them all in one template so that when copying Styles, that same template can always be chosen to draw from, to ensure consistency throughout the template set.
- Do NOT create any styles with the name of “Normal” or “Body Text” (though those words can be included, just not as the only words).
- It is possible to create Styles in Word outside of the Applied/Word Interface.

Styles to create – suggestions

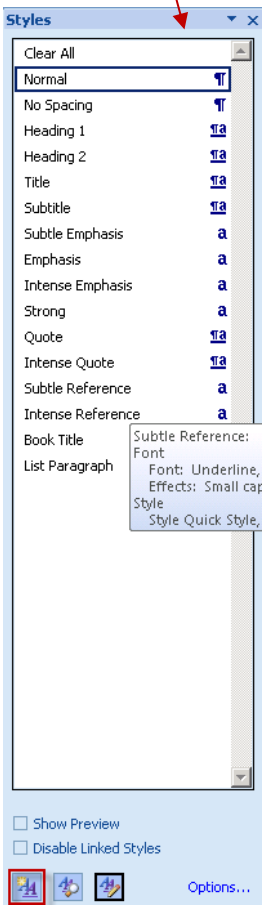
- 1-Normal (or 1-Body Text)
- 1-Header 1 (or 1-Heading 1 or 1-Coverage Header)
- 1-Header 2 (or 1-Heading 2 or 1-Coverage Subheader)
- 1-Header 3 (or 1-Heading 3)
- 1-Table Header
- 1-Table Contents
- 1-List or Bullet style if needed
- Others as needed based upon your needs

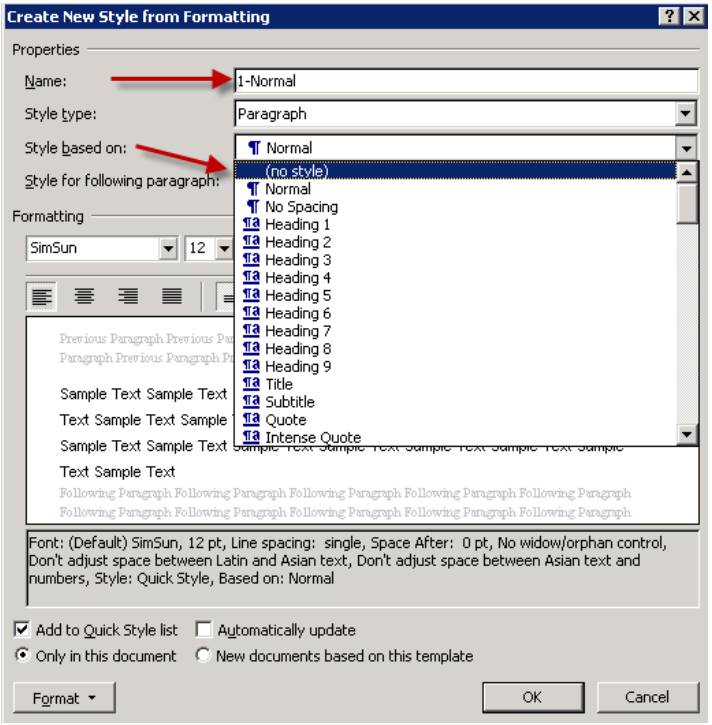
Creating Styles – Step by Step

1. To create Styles, from the Styles group of the *Home* command tab, click on the lower right corner to open the *Styles* dropdown window.



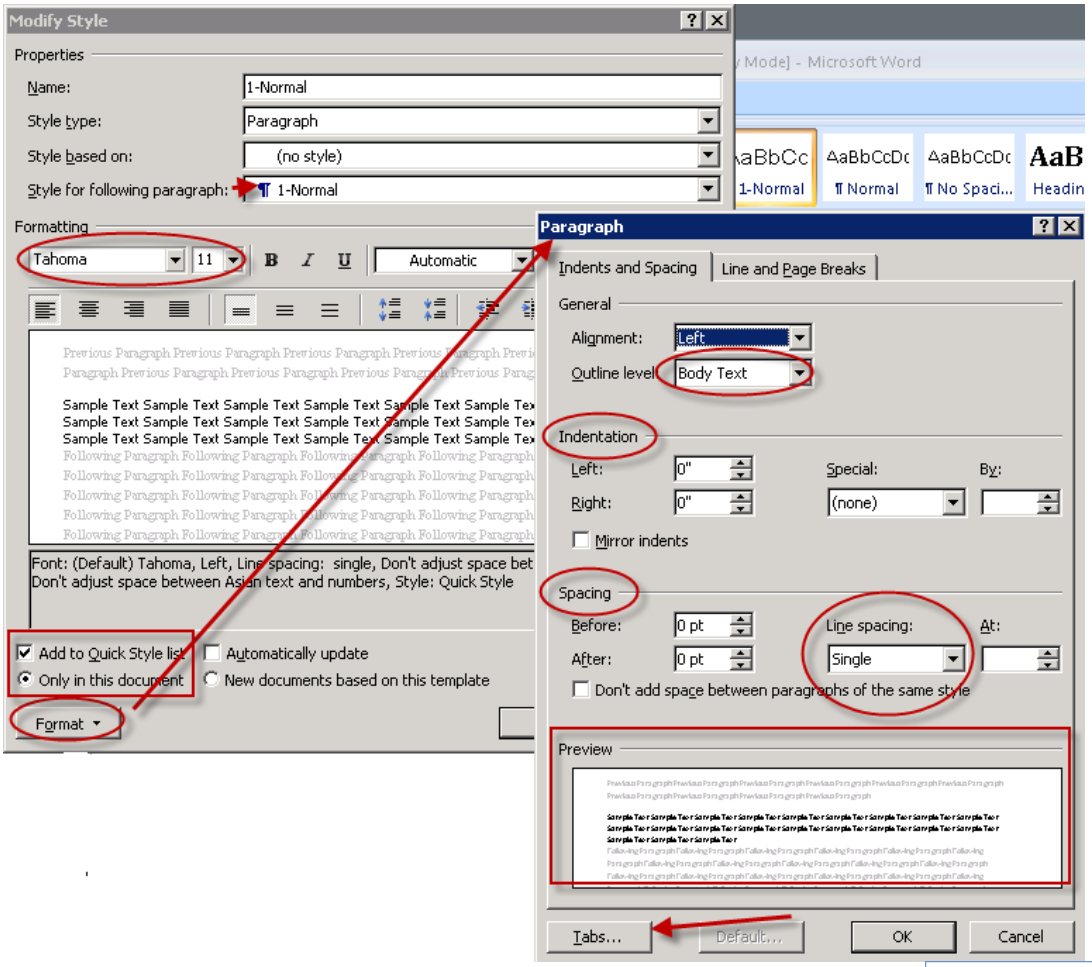
2. Select the ***New Style*** option in the lower left (outlined in red in the picture to the right) to open *the Create New Style from Formatting* window shown below. First Create your "Normal Style". We are going to call ours 1-Normal, and make it Tahoma 11 points, with an outline level of Body Text.



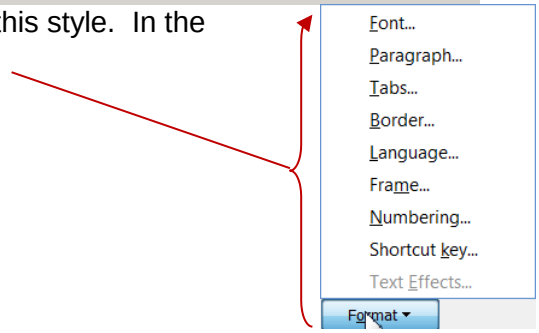


3. a. Create the Style *Name*
   b. *Style type* will be Paragraph
   c. *Style based on* – it is CRITICAL that this be changed to (no style) selection
   d. *Style for following paragraph*, will default to the style being created, in this case it defaults to 1-Normal which is appropriate.
   e. Select the font and default size in the *Formatting* section (in the screenshot above it is not yet changed from the default) and alignment if not left aligned.
   f. Confirm that the ***Add to Quick Style list*** and ***Only in this document*** boxes are checked. Always leave the ***Automatically update*** box unchecked.

4. Next, format the paragraph and confirm:
    a. *Outline level* is Body Text
    b. Any *Indentation* should be set to 0”
    c. *Spacing Before and After* is set to 0 pts
    d. *Line spacing* is Single
    e. ***Format Tabs*** for this style if needed
    f. View the results in the preview section

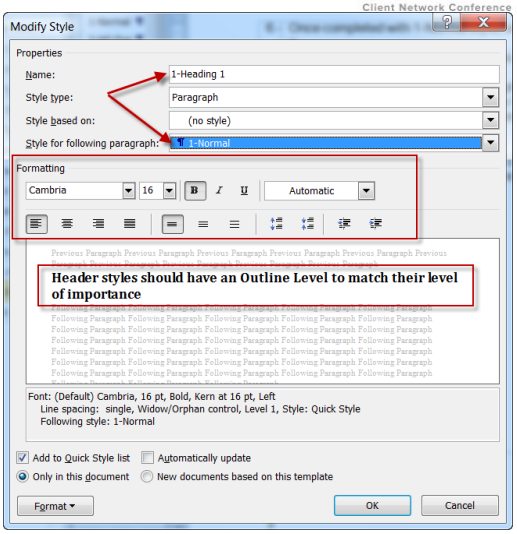


5. ***Format*** any of the additional options if needed for this style. In the case of our 1-Normal style, there should be none.



6. Once completed with 1-Normal style, select ***OK*** to finish.

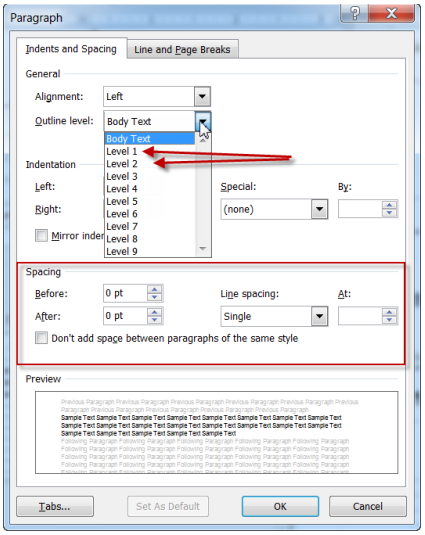
7. Repeat these steps to add other Styles needed. For Heading/Header styles, some tips:



   a. *Style for the following paragraph* for header styles should be the 1-Normal style to assist with editing.

   b. Font Formatting will be a different size, perhaps bold and even a different font than your 1-Normal Style.

   c. Notice the *Preview* window as this style is created.



   d. Header styles should have an *Outline Level* to match their level of importance (i.e.: 1-Heading 1 carries *Level 1*, 1-Heading 2 is *Level 2*, etc.)

   e. *Spacing Before and After* may include extra spacing. If spacing is selected, the option to not add space between paragraphs of the same style may be selected if desired.

   f. ***Format*** any *Borders & Shading* as desired.

8. For contents inside of tables, Paragraph Styles for the contents in the cells of the tables should be created. Tips:

   a. Including some *Spacing Before and After* will allow room between the words and the lines of the table.

   b. *Outline level* on any of these styles should be Body Text.

   c. Note that any of the Paragraph Styles created and used within a table will override any font styles created within a Table Style (to be covered later).

9. Complete this process for all Styles needed.

Applying Styles

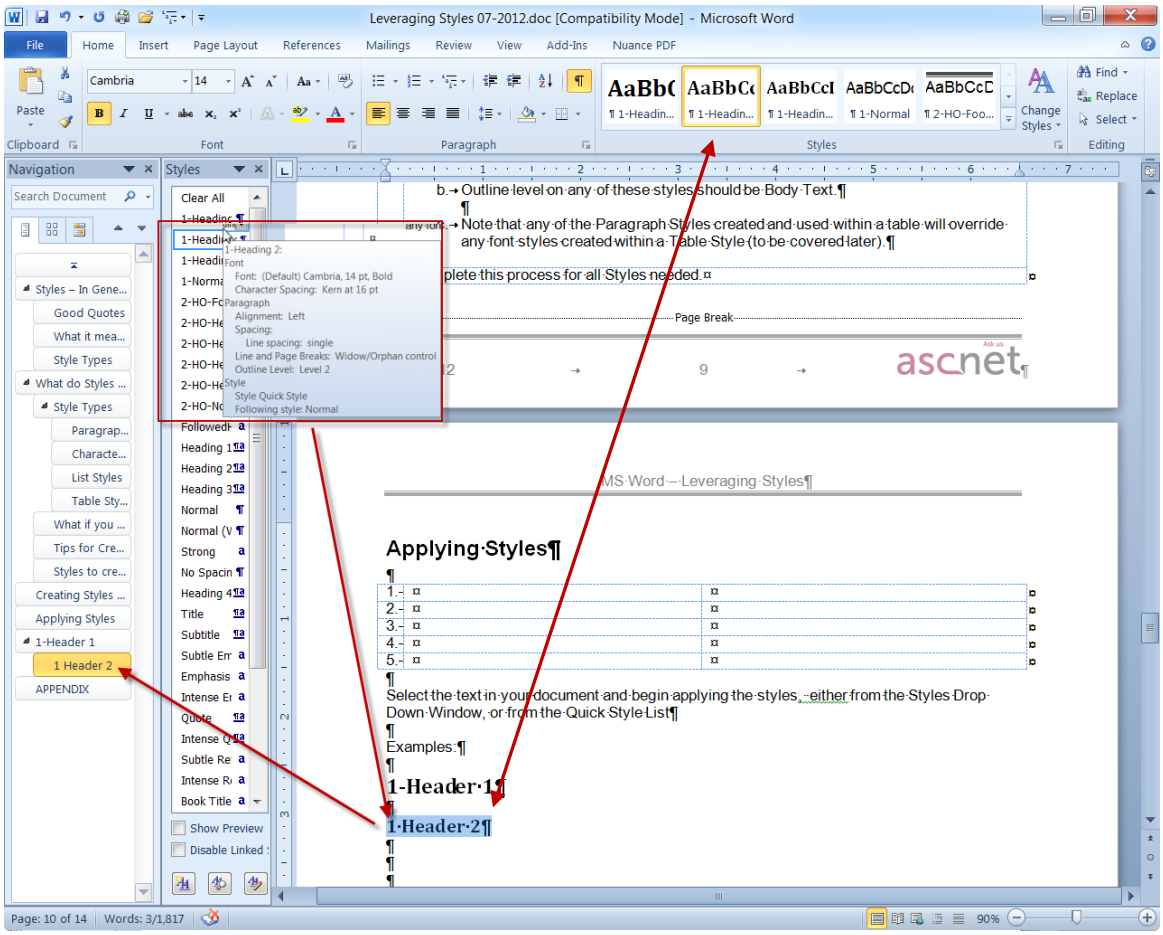
1. Select the text in your document and begin applying the styles:

    a. Select the text by highlighting

    b. Use the *Styles* drop down Window or the ***Quick Style List*** to select the style desired.

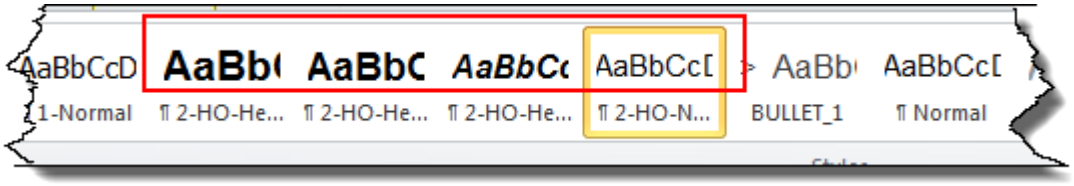
    c. Notice that with the *Navigation Pane* Window that the Styles will build the list.

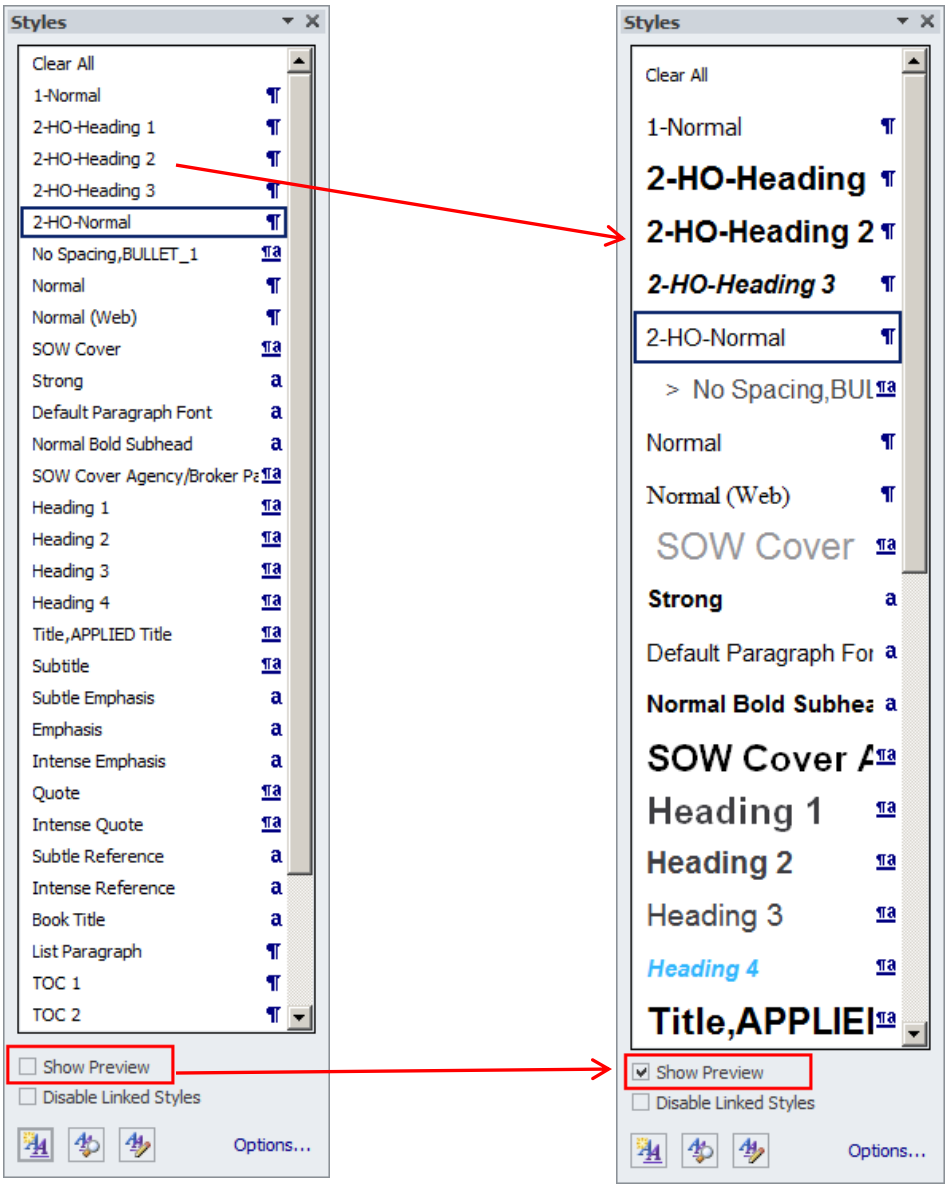
    d. Optionally, consider selecting the entire document using CTRL A (to select all), and apply the 1-Normal style to everything first, then go through to apply all of the other styles to specific lines as needed.



2. Continue through the document and apply styles to every single line of text.

3. Note that optionally you may wish to have your styles list "preview" the style, instead of just use the style name. To accomplish this, open the *Styles* window and check the ***Show Preview*** box. In either case the *Quick Style list* will have a preview of the "look" of the Style.

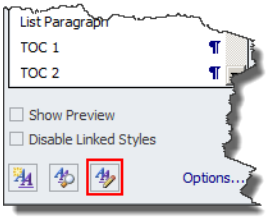




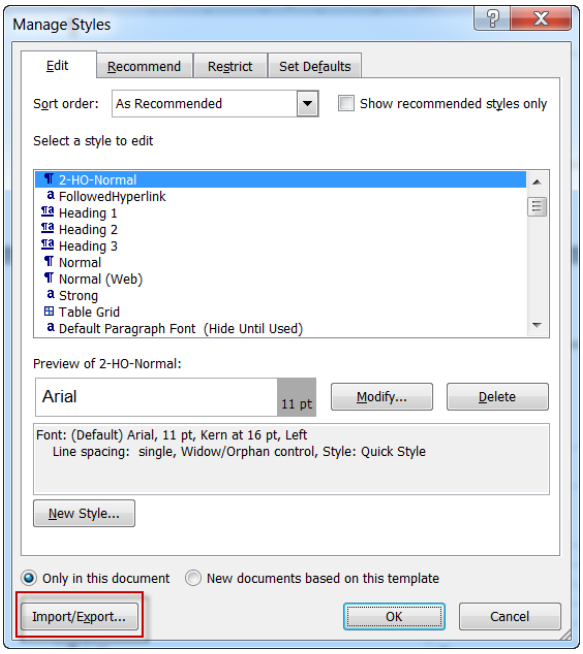
Copying Styles – Step by Step

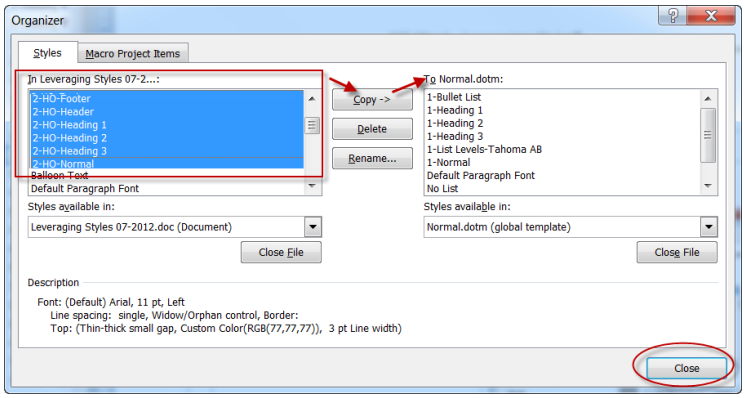
1. Access the document where your “good Styles” exist.

2. Open the *Styles* drop down window, and select the ***Manage Styles*** option on the lower right.



3. From the *Manage Styles* window, select ***Import/Export*** from the lower left.



4. 

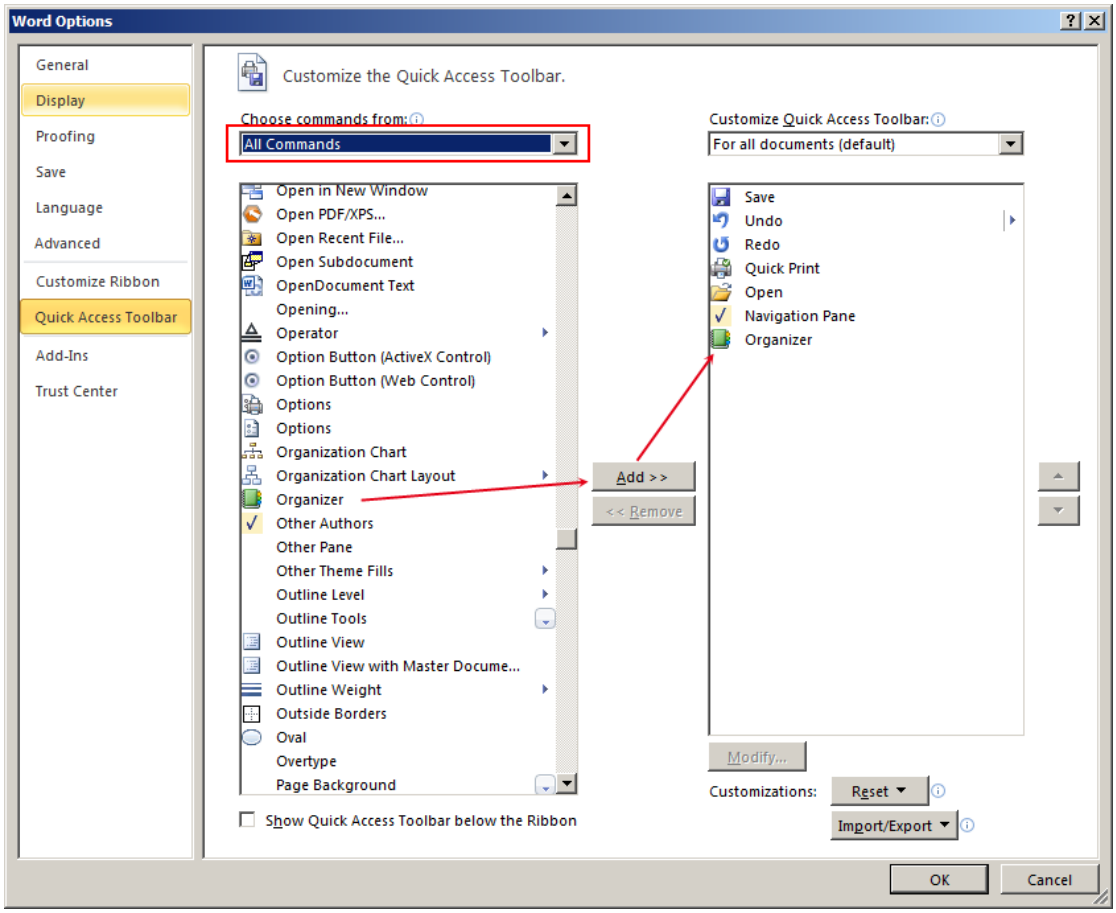
From the Styles in the document open on the left, select the group of styles to copy, and then ***Copy*** them to the Normal.dotm on the right. This is the holding place in Word for the styles, on your workstation or in Word if you are a TAM Online user.

Select ***Close*** once finished.

5. Close out of the document template.

6. Access the next template needing the Styles, and repeat the process above, except ***Copy*** the styles from Normal.dotm to the new document. The movement of the styles will be from the right to the left. Note that if the Styles already exist in this document, you will need to answer "yes to all" to overwrite the styles there with the same name.

7. Optionally, take the time to add the ***Organizer*** tool to your *Quick Access Toolbar*:
   - Click the down arrow on the *Quick Access Toolbar*, or select ***File, Options, Quick Access Toolbar.***
   - *Choose commands from*, select ***All Commands***
   - Scroll down the list to ***Organizer*** and ***Add*** it to the toolbar, use the up and down arrows to move it to the location you desire.



Paragraph Style Notes

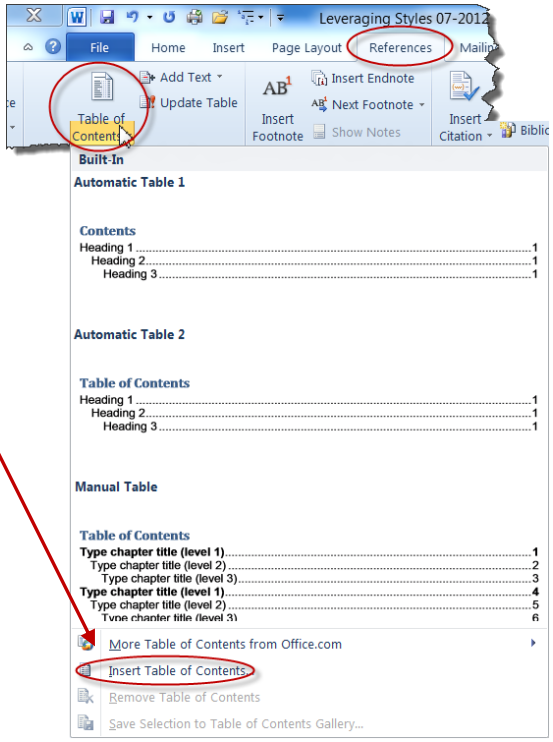
Table of Contents Creation

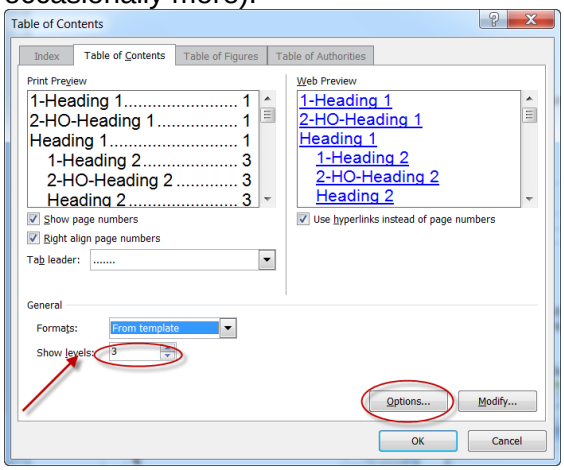
Styles allow you to build a Table of Contents for long documents, very useful for creating a table of contents once a proposal has merged.

1. From the *References* command tab, select ***Table of Contents*** from the ribbon.

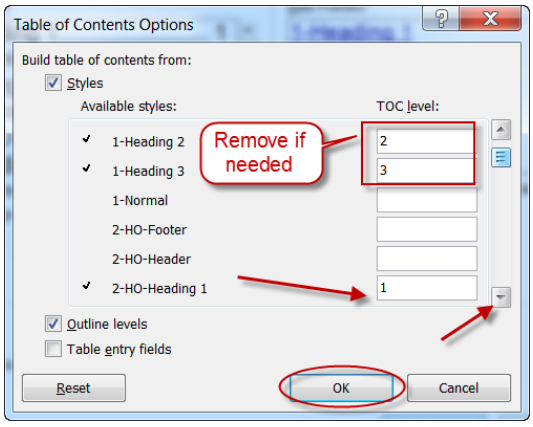
2. Select ***Insert Table of Contents***.

3. From the *Table of Contents* drop down window select the *Show levels* to the number of headings you wish to include in the Table of Contents (usually 1 or 2, but occasionally more).

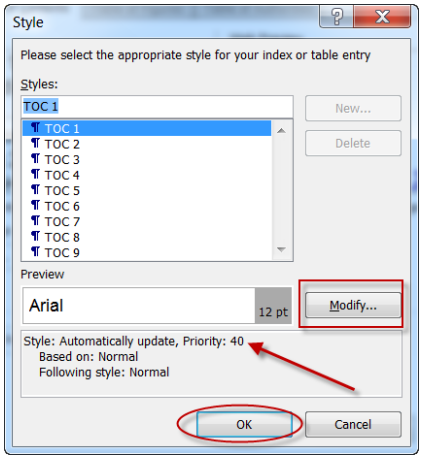




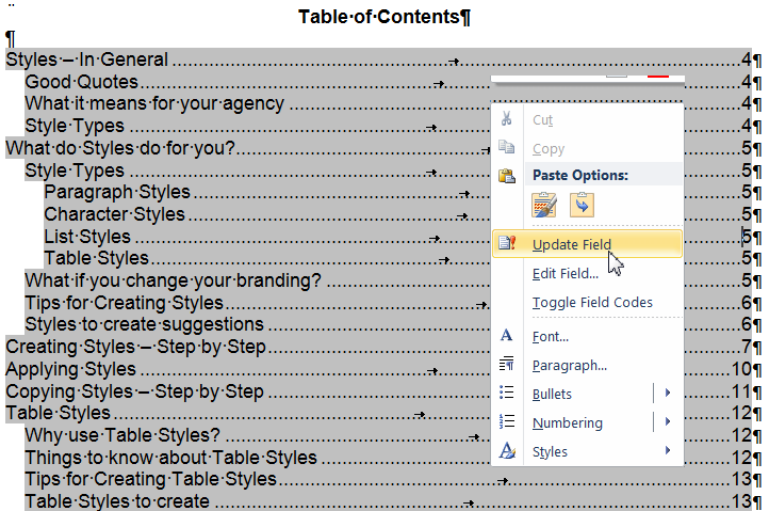
4. Access ***Options*** to remove errant heading styles from the list if needed.



5. If needed, select ***Modify*** to change the font for the various levels of the table of contents desired.



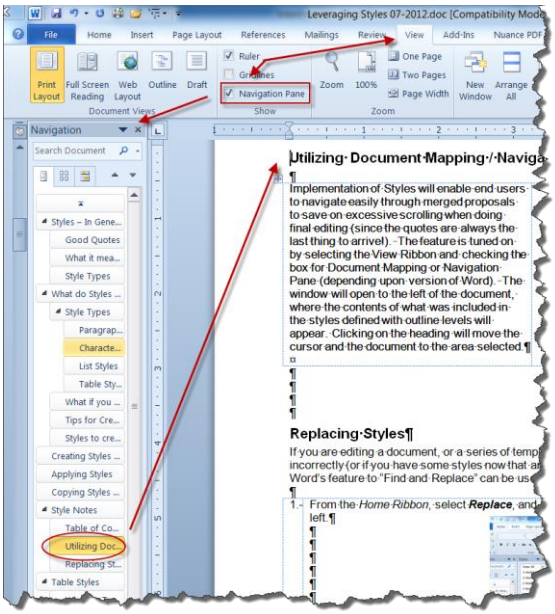
6. ***OK*** to create the Table of Contents. Note that if it does not appear immediately an ***ALT F9*** may need to be used to reveal the results.



7. Note that if any changes to the document are made after the Table of Contents is created, the last step should be to right click on the table of contents, and ***Update Field***, and either select ***Update page numbers only*** or ***Update entire table*** (depending on the changes that have been made). Also note that a user can CTRL + click on one of the lines in the table of contents to move them to that section of the document. This coding usually stays “live” if the document is saved to PDF.

Utilizing Navigation Pane Options

Implementation of Styles will enable end users to navigate easily through merged proposals to save on excessive scrolling when doing final editing (since the quotes are always the last thing to arrive!). The feature is turned on by selecting the *View* command tab, and checking the box in the ribbon for ***Navigation Pane***. The *Navigation* window will open to the left of the document, where the contents of what was included in the styles defined with outline levels will appear. Clicking on the heading will move the cursor and the document to the area chosen in the window.

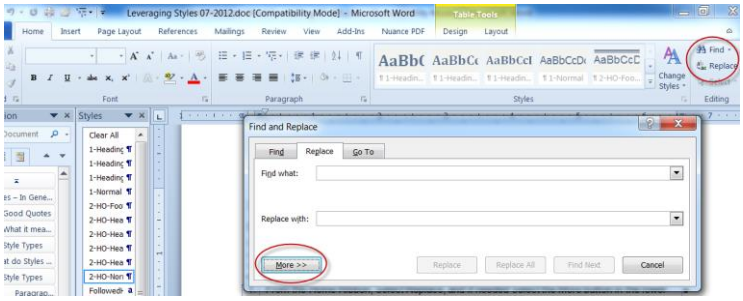


Note: Should the pages in the merged document need to be put in a different order, it is possible to click on the heading in the *Navigation* window and drag it to a different location in the merged document. There may be some cleanup to do with page breaks (and the table of contents will need to be updated) but this is cleaner than a copy and paste or a cut and paste would be.

Replacing Styles

If editing a document, or a series of templates, and you realize that styles were applied incorrectly (or if you have some styles now that are "mixed up" and you wish to replace them), Word's features to ***Find*** and ***Replace*** can be used to automatically find and replace them.

1. From the *Home Ribbon*, select ***Replace***, and if needed select the ***More*** button in the lower left.



2. Select ***Format*** from the *Find and Replace* window and select ***Style.***

3. In the *Find Style* window select the style you wish to find and ***OK.***

4. In the *Replace Style* window click ***Format*** / ***Style*** and select the style you with to replace over the one selected above and ***OK***.

5. Select ***Replace All*** in the *Find and Replace* window.

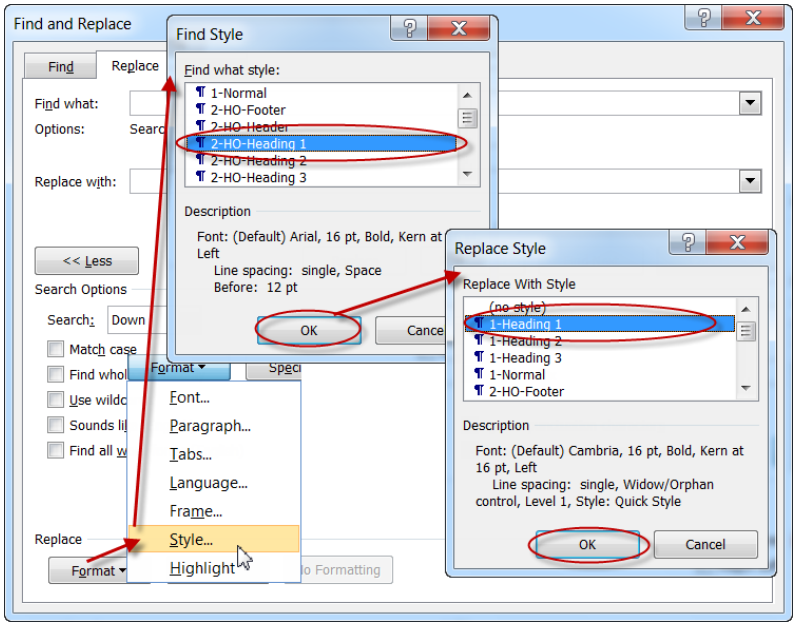


Table Styles

While the Paragraph Styles we have been discussing are critical for proposal templates, the use of Table Styles can be a nice time saver for the document setup specialist in your office. Use of Table Styles also allows for implementation of some of the more advanced features of using tables in your templates.

Why use Table Styles?

- **Table Borders**: Tables when created will default to the "automatic" black color. Table Styles are useful for tables using no borders or with a color other than black.
- **Header Rows**: Tables with a colored fill for the header row can be done manually as each table is created, but a Table Style saved in the document can consistently apply the same color to the header row with less possibility of error in selecting the RGB color.
- **Alternating Table Rows or Columns**: Alternating bands of color can be useful for separating rows of data (think vehicle schedules). Creating a table style that includes the alternating bands of color will simplify creation of the document templates, and is a MUST for end users to know how to use after document merging in many cases.
- **Font selection, color, size and alignment**: While font selection can be included in table styles, it is suggested that usual Paragraph Styles be used instead. Paragraph Styles will always take precedence over font selection made in a Table Style anyway, so keeping the process of creating the table style simpler is recommended.

Things to know about Table Styles

- For Table Styles to be used, the table you wish to use must be created first (see Appendix A).
- Confirm any RGB (Red / Green / Blue) numbers for any custom colors that you wish to use for the table header row as well as any alternating bands of color that may apply later in the table.
- For table styles containing alternate color banding rows to not break for Applied TAM, the document containing the table styles must be created outside of Applied TAM and the document copied and pasted to where Applied TAM expects to find it for any editing you will do and/or placement of data fields (see Appendix B).
- It will be necessary to train staff on how to reapply any Table Styles if any changes are made to the tables after merging for Applied TAM.

Table Style "Challenges"

- Note that Paragraph Styles if applied within the table may conflict with any font selections within the table style setup. As an example, if the header row has selected a bolded font, then the bolded paragraph style of "Table Header" is applied to the text in the table, the resulting text may come through as unbolded.
- Occasionally a merged table may "break" either between the header and the replicated data, or sometimes between rows of the replicated data. This appears often as if the table borders are inconsistently sized, or as if there is a double line between the two broken sections. Recent testing has shown that removing the table style within the template and using a "direct formatting" approach to the table solves the issue. Please be aware of this if using Table Styles in your templates. Tables where the data is not replicated however seem to work well with Table Styles applied.

Tips for Creating Table Styles

- Group table styles together with paragraph styles using the same naming convention except you may want to include a T in the beginning of the style name title to keep the table styles sorted from the paragraph styles to ease confusion (example: If the paragraph style naming convention is 1-Normal, use 1T-No Border Table or 1T-Table No Border).
- Be consistent with whether or not a dash is used in the naming
- Choose a name that is meaningful for the type of style if possible, rather than using the color selection in the title (in the event colors might change in a future rebranding). Examples:
    - 1T-No Lines
    - 1T-Header Row with lines
    - 1T-Alt Color Bands with Header
    - If different alternating color bands are used for different areas of the proposal name according to where used, i.e.: 1T-Alt Color Bands for Schedules
    - 1T-Table… may be the beginning of all of the titles if desired
- When creating table styles start with formatting anything that applies to the whole table first, then proceed to options that apply to the header row, and finally to any alternating bands of color used.
- Copying table styles from one document to another is done using the same process as paragraph styles; however the table styles when applied will be found on the *Table Tools Design* sub-tab with a table selected within the document.
- It is preferred to create Table Styles in Word outside of the Applied/Word Interface. For use in Applied TAM, Table Styles including alternating bands of color must be created first outside of the Applied TAM Word Interface for the banding to automatically apply to replicated rows after the document merges.
- While creating table styles can be done from the normal *Styles* window where the paragraph styles are created, it is suggested to use the interface within the *Table Tools Design* tab.

Table Styles to create

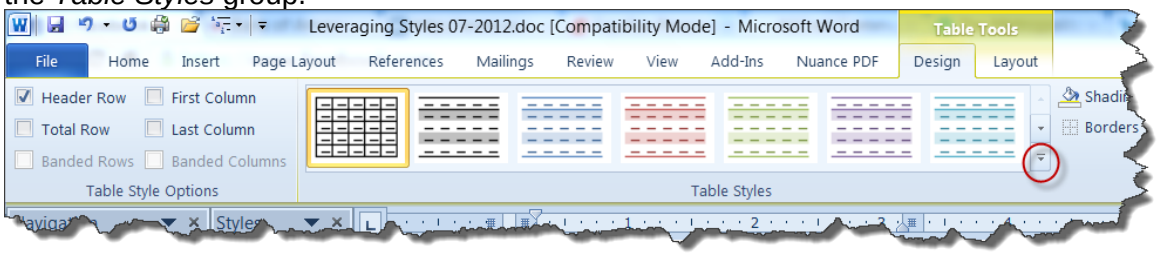
The number of table styles to create will depend primarily on your agency's unique needs. Remember to include styles for combinations of features that you will use. Some suggestions include:

- If any tables will use "no borders", create a table style with no lines
- Any tables with other than automatic black lines
- Color filled Header row
- Alternating color bands
- Combinations of the above options as needed for tables in use in your template set

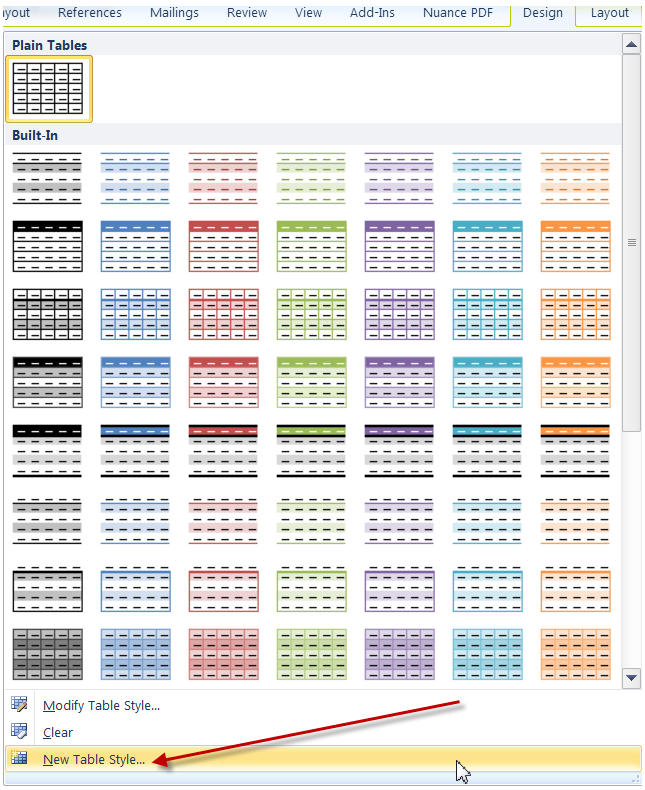
Creating Table Styles – Step by Step

1. Select a blank table within a document.

2. From the *Table Tools Design* sub-tab, select the ***drop down arrow*** from the lower right of the *Table Styles* group.

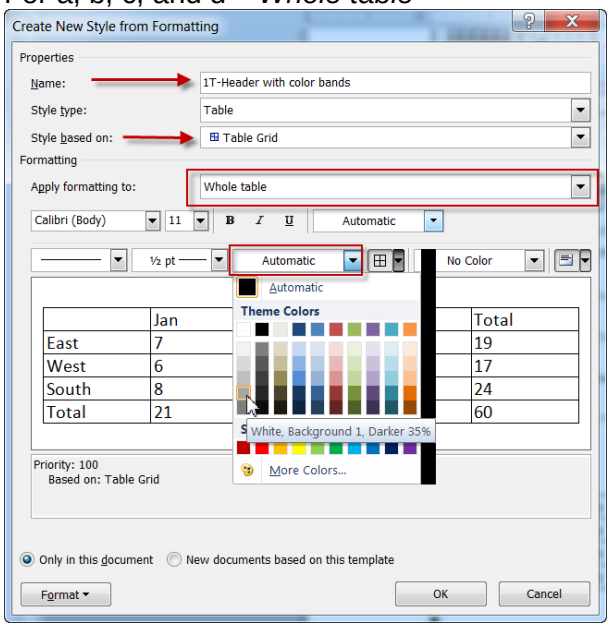


3. From the bottom of the *Table Style* drop down window select ***New Table Style***.

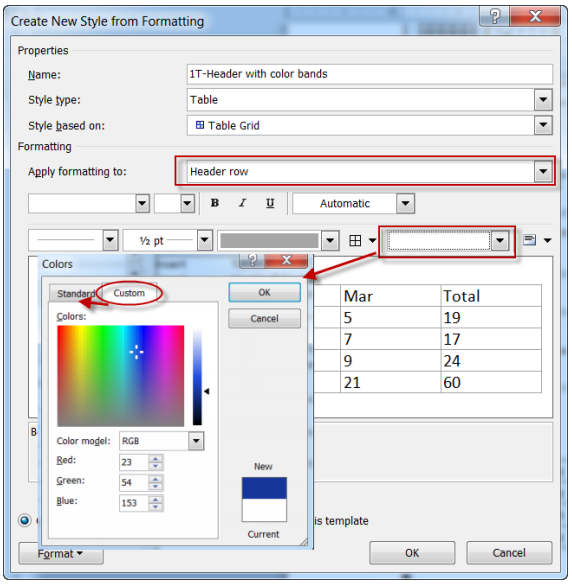


4. See specific screenshots that follow for each of the options listed here.
    a. Create the Table style *Name*
    b. *Style type* will default to Table when created using this process
    c. *Style based on* – change the default to Table Grid
    d. *Apply formatting to*:
        - Begin with any formatting to apply to the entire table. In our example we are going to select gray lines for the entire table. (see below)
        - Next select any filler color for the Header row.
        - Select any color banding options desired.
    e. Ignore the font selection as the paragraph styles created earlier will be used for any wording in the table.

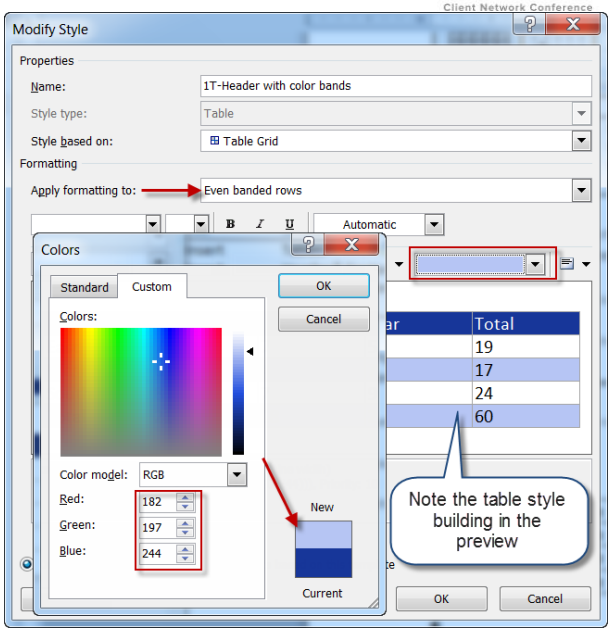
For a, b, c, and d – *Whole table*



For d – Header row color select Header row, then the *fill box*, pick ***More Colors*** and then select from the *Standard* tab or the RGB colors from the *Custom* window. In this case we are using 23/54/153.

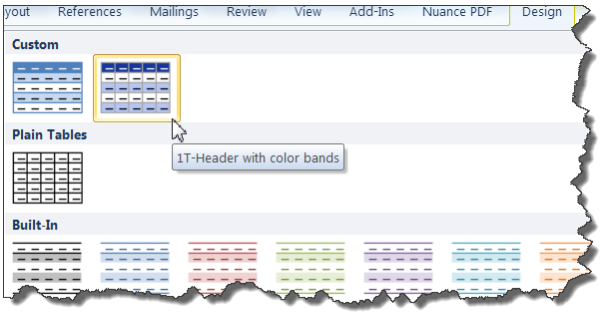


For d – Color banding, select *Even banded rows* (or your row or column selection), then the *fill* box, pick ***More Colors*** and then select from the *Standard* tab or the RGB colors from the *Custom* window. In this case we are using 182/197/244. Notice that the table style *Preview* window is displaying how the table will appear when the style is selected.

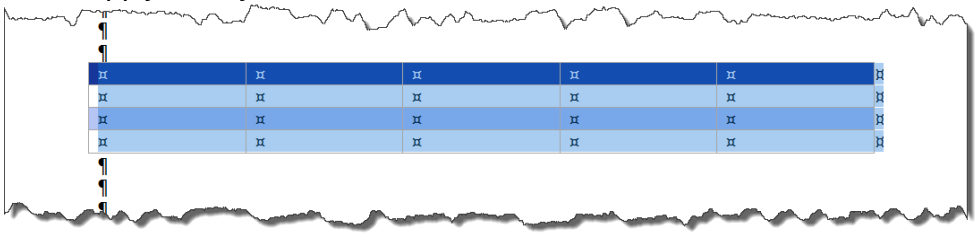


5. ***OK*** to the table style once complete. Note that the new table style created will not automatically apply to the table selected for building the style.

6. Select the entire table where the table style will be applied and from the *Table Tools Design* sub-tab, click the ***drop down arrow*** from the lower right of the *Table Styles* group as in step 2 above. A preview of how the table style will affect the table you selected will appear in the document.



7. ***OK*** to apply the style to the table and view the results.



8. If necessary, make any changes to the table style by selecting it from the *Table Styles* group on the *Table Tools Design* sub-tab (select a table if necessary for the *Table Tools* command tab to appear) and right click on the style to ***Modify Table Style*** for any adjustments.

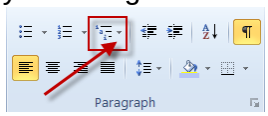
Reminder Notes on Table Styles

- Table styles can be copied using the same interface for copying paragraph styles.
- Table styles will be available on the *Table Tools Design* sub-tab with a table selected in the document (for either template building or once a proposal has been merged).
- On replicated data for schedule fields where alternating color banding is used:
  - For Applied TAM, if possible create the table styles in a Word document outside of Applied TAM and then copy and paste that document into where Applied TAM expects to find it so that the alternating color bands will merge and appear properly.
  - For Applied TAM, if a merged document with color banded rows merges properly and any change is made to that document, the banding will "break" and the end user will must know how to reapply the style from the *Table Tools Design* sub-tab.

Additional Styles Notes

List Styles

- Remember that *List Styles* might also be useful for specially colored bullets or different symbols with varying levels. Multilevel lists styles may be created by selecting ***Define New List Style*** from the ***Multilevel List Button*** inside the *Paragraph* group of the *Home* command tab.



- Paragraph styles that include numbering or bullet points without multiple levels can also be created from within the *Styles* window selecting *List* from the *Style Based on* selection.
- Use of List styles will primarily be helpful for document setup staff to ensure that numbering or bullet points (also if additional levels included if needed) are consistent throughout all templates.
- **NOTE**: There are occasions where the bullet point or list style will not pull through correctly once the template is merged. When this occurs if the style is included in the template it will be available for the end user to select and apply to correct the formatting.

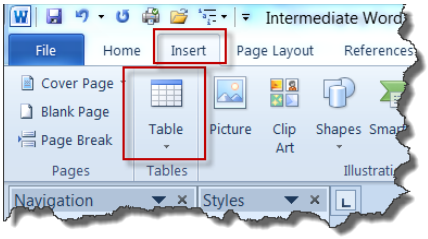
Linked Styles

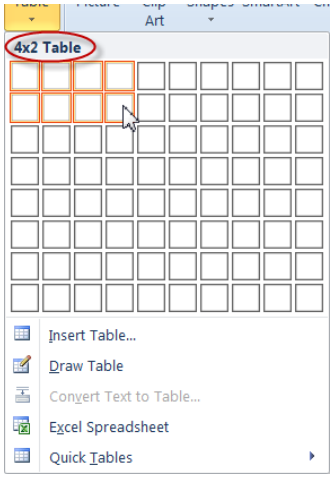
- The caution on using Linked Styles in templates is to try not to use them unless absolutely needed.
- Be aware that a Linked Style when used as a Character Style will pull through to the Table of Contents if the style is listed with an outline level.
- There are concerns about Copy / Cut and Paste within a document that has Linked Styles applied that the resulting pasted data may format improperly.
- Use of Linked Styles may also cause issues if Styles are updated at some point in the future.
- **Use caution** and test heavily before creating Linked Styles within your templates.

Appendices

Appendix A – Inserting Tables – Step by Step

1. From the *Insert* command tab, select ***Table*** from the *Tables* group on the ribbon.

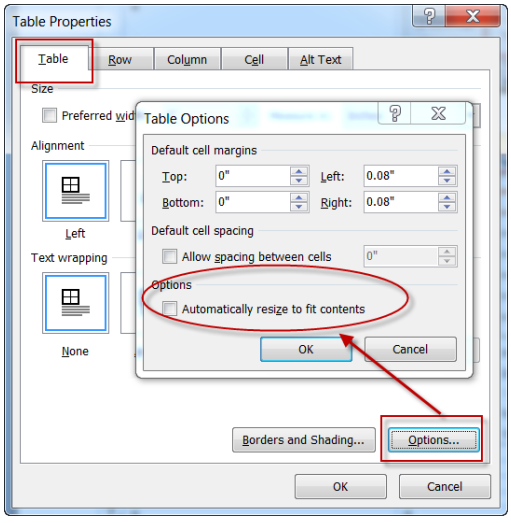


2. 

From the *Insert Table* drop down, select the number of rows and columns desired for the table. Note that as the rows and columns are selected, the details appear at the top of the window, and the table preview will appear within the document. Click on the lower right cell when complete to add the table to the document.

3. Select the entire table just created, right click and select ***Table Properties***.
   - From the Table tab, select ***Options***
   - Uncheck the Options box to eliminate the *Automatically resize to fit contents* feature.
   - ***OK*** to Table Options
   - ***OK*** to Table Properties.

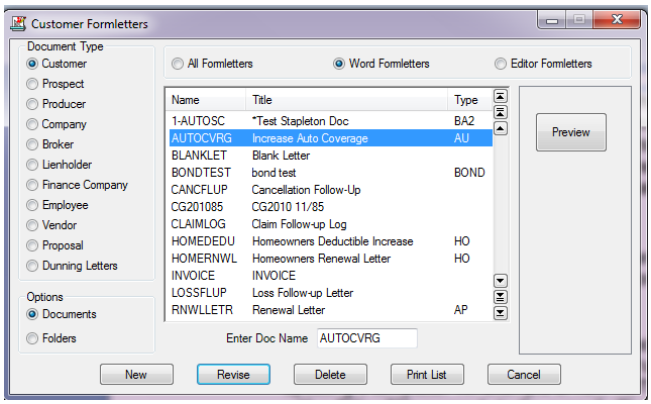
   Note: Optionally you may select the table, right click, select *Auto Fit,* and *Fixed Column Width* to accomplish the same result.



4. Format any additional options needed for this table depending on your needs.

Appendix B – Copying Documents into Applied TAM without breaking fields

Data structure for document storage



Understanding where the Applied TAM templates are stored is a requirement for this process. All Applied TAM templates are stored within the X:\DOC subdirectory (where X is the drive letter of your Applied TAM system or Attachments subdirectory for Applied TAMOnline).

- Customer formletter templates are stored in the CFORMLET subdirectory
- Prospect in PFORMLET
- Proposals in PROPDOC.

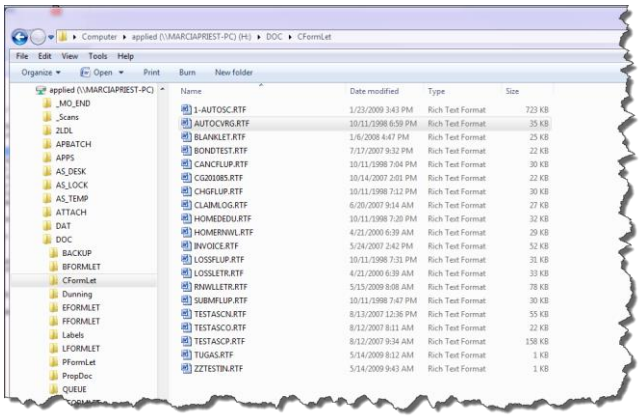
You must also know the *Name* of the template to be copied. In the sample shown, the name is AUTOCVRG and would be located in X:\DOC\CFORMLET. The "trick" is to put the copied file where Applied TAM expects to find it, and then add the new document in the Document Setup Utility.

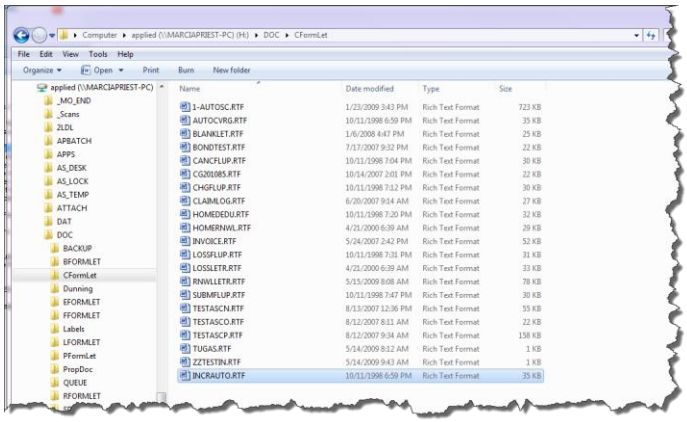
Step by Step:

Example: Use the "Increase Auto Coverage" template carrying a *Name* of AUTOCVRG. To create the same template using a name of INCRAUTO (where the Name matches the Title):

1. Using Windows Explorer or My Computer, navigate to the directory where the Applied TAM Template is stored. In this case that would be H:\DOC\CFORMLET.

2. Find the AUTOCVRG template on the list, select, right click and ***Copy***, then right-click in the same directory and ***Paste*** (or ***CTRL C*** and ***Ctrl V*** for Applied TAMOnline).



3. 

Rename the copied file to reflect the new *Name* desired. In this case INCRAUTO. Use care not to change the document extension as it needs to remain .RTF.

4. Access *Document Setup* in Applied TAM and select ***New***. Add the newly created *Name* and *Title* in the appropriate fields, ***OK***, and the old template should default in the Word window when complete. All field codes will still function properly when using this method. If needed, delete the old file (if just moving a document as in this example). Always use the delete option within the Document Setup window for removing templates from Applied TAM.

Appendix C - Other Classes and Handouts from the Proposal Track Series

- Proposals and the Power of Graphic Design – This class also includes information on a Style Guide you may find useful for your design specifications.
- Microsoft® Word® – Introduction to the Applied TAM Interface – Install Free Set – Includes instructions for downloading and installing templates.
- Intermediate Microsoft® Word® Formatting – Applied TAM – includes Tables, Borders & Shading, Section Breaks, headers & footers, etc.
- Leveraging Microsoft® Word® - Applied TAM
- Applied TAM/Microsoft® Word® - IF, ASK, Math, SET, Bookmarks, INCLUDETEXT
- Applied TAM/Microsoft® Word® – Formatting Numbers, Text & Dates
- Applied TAM Proposal Workshop / Advanced Clinic – this session has no handouts and will be based upon questions and issues brought to the group by the attendees.