



A trainer's view: Make your daily processes in Microsoft Word simpler with a template development workshop

Overview

Lots of people use Microsoft Word to produce letters and reports with little or no training as it is intuitive and 'discoverable'. Occasionally though, an organisation or individual user wants to do something more complex. This could be either a selective mail merge or to design a template that is easy and straightforward to use. Most users are busy people and acquiring expertise for a one-off task is not the main part of their job – but it is mine!

Formal classroom training doesn't always suit Word users, which is why Optimum promotes tailored workshops where we can work together to find a solution to a specific problem. When sophisticated template development is needed, we can design a template to your specifications and then train key users to use it effectively.

Maggie has worked for Optimum for 12 years. She specialises in training on desktop application courses and has years of experience with Microsoft Office programmes. She is a certified product specialist in Microsoft Word and Excel and an IITT accredited trainer. Before working for Optimum she worked for 8 years in training support for a financial services organisation.

Workshops in practice

Template Workshops: A Word user who worked for a portfolio management organisation produced client reports by importing text into a document and then applying the corporate styles. The user needed to delegate this task to other colleagues and wanted to create a foolproof template in Word for them to use. During a half-day workshop we created a customised template with built in styles, AutoTexts and fields.

'Wow' factors that also arose included applying the styles from the template to update other documents. Word fields like 'createdate' were also produced which allow the date to be automatically inserted into a report.

Selective mail merge: Another employee from the same company needed to generate an annual statement letter to all staff detailing salary and benefits. The data was downloaded from a database into Microsoft Excel and then merged to include or exclude paragraphs depending on whether there was a value in a particular field. For example, if a bonus was to be received then a certain paragraph needed to be included, but where no bonus was given that paragraph was omitted. During the workshop, we set up a fairly complex IF Word field to insert into the paragraph if there was data in the field and to format numbers correctly.

The 'wow' factors included being able to number the pages of each letter and to format the merged numbers to suit the overall formal style of the letter.

Continued over

Call us now for more information on:

020 7776 9876

or email info@optimum.co.uk



Template development and training:

Example 1: The housing team of a London council were required to produce a variety of documents such as an initial assessment report, daily visit reports and their own timesheets. This involved preparing a suite of templates, using Word (and Excel for the time sheets).

Overall the team were not very computer literate. Some had used a computer for shopping and email, but others had never used a computer at all. We had to provide intensive training to cover both the use of templates and also the basics such as saving their work.

Other 'wow' factors included automatic typing, learning job-relevant shortcuts, Auto Correct and AutoText.

Example 2: Report writers at one particular public sector regulatory organisation needed to produce a lot of documents and therefore already knew a lot about Word. They also had a comprehensive style guide that everyone subscribed to. So why did they need help with template development? They required a set of templates for their reporting and consultation documents with styles, special toolbars, help screens and dialogue boxes to enter data – and they wanted them automating.

So although most of the report writers had a good grasp of Word, they didn't have the expertise to write VBA code to automate the process and acquiring this sort of skill is not part of their job – but it is mine! Armed with a very clear specification, and with a great deal of consultation, I designed the templates and put them forward for rigorous testing.



'Wow' factors: As a trainer I was impressed by their clear and realistic specification. There was a lot of discussion around how to achieve some effects but with a flexible approach as well. One area where there was no compromise was on the quality. Another 'wow' factor included providing quick access to instructions and style guides.

Summing up and recommendations

Microsoft Word users will often have a good level of expertise to carry out their day-to-day work. However, using templates can make the repetitive aspects of their work significantly easier and help to create a more consistent style and corporate image across documents produced by different users. I would recommend the following approaches to teach Word users how to develop and apply templates:

Designing workshops with your key users to help create a template for a specific purpose, with added-value because they acquire skills and expertise first-hand.

Creating a template, or set of templates that are robust and provide corporate continuity. These can then be uploaded onto your company intranet or shared drive.

Call us now for more information on:

020 7776 9876

or email info@optimum.co.uk