# Installing the template

We will install this form in Word as a Personal Template. We've all had the experience of creating a boilerplate document like a meeting announcement or minutes and opening it each time to re-use it. And we've had the experience of inadvertently saving the current document back to the boilerplate template and then having to clean it up. By installing the document as a template, we can avoid this error and have the template ready to use each time we open Word.

To do this, we need to confirm one Word setting, and establish another one. (Microsoft isn't real friendly about this.)

**Setting up Word for personal templates**

Open MS Word.

Click Blank Document, just to get past this screen.

Click File-->Options-->Advanced.

Scroll nearly to the bottom, to General, and click the "File Locations..." box.

Click "User Templates" to highlight it.

Click "Modify". We are NOT going to modify it but we need to see the entire location.

Click in the "path" at the top, so you can move from end-to-end to see the entire location. You can remember it, write it down, or more simply, highlight the entire thing and press Ctrl-C to copy it. It should look like

C:\Users\**[User Name]**\AppData\Roaming\Microsoft\Templates\

where **[User Name]** is replaced with your name.

Click Close

At the left side, click "Save".

In the line labelled "Default Personal Templates Location", which will probably be blank, enter or paste the location from the previous step.

Click "OK" at the bottom

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The template is delivered as a .zip file. Download it double-click to open it. Click Extract to recover InfoShare V12.dotx. Then copy the template, InfoShare V12.dotx, into the location we just identified, C:\Users\**[User Name]**\AppData\Roaming\Microsoft\Templates\

# Using the template

Using this template is easy. You will start Word and select the template. A new document is created; just fill in the blanks and print or save.

When you start Word for the first usage the template may not be visible. At the top of the screen, click Custom and then look in the Templates folder and the Custom Office Templates folder. After you've used the template once, it will be shown on the first screen as a Featured template.

The first page is not a part of the agreement. Just fill in the fields and the information will be transferred to the following two agreement pages. It's easiest and fastest to use the Tab key to move from field to field. The selected prompt will highlight and be erased on your first keystroke.

**A quirk of Word is that the information is not transferred from the until you either Print Preview or Save the file. To Print Preview, select File-->Print, and then the Back Arrow at the top left.** **You do not need to print the document.**

You would then fill out the remaining information on agreement pages 2 and 3, consulting with the client where appropriate. When you print the agreement for client signatures, you can elect to print only pages 2 and 3. There is no need to print page 1.

Please let me know of any bugs, concerns, questions, or changes that are needed.