



ImQuSo OFT manual





IMproved QUality SOlutions

MANAGEMENT SUMMARY

Manual for the ImQuSo One File Template tool

Document History

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1 General

1.1 Purpose

This document is the user manual of the One File Template (OFT) for MS Word. The OFT automatically generates Word templates for different types of documents.

The goal is to:

- have a single entry point for all templates
- ensure that templates are consistent for every user
- ensure that the latest versions of templates are used
- count the usage of a template

1.2 Scope

This manual is intended to be used by all the members of the <XYZ organisation> that use templates.

1.3 Terms, Definitions and Abbreviations

Table 1 Terms, definitions and abbreviations.

Terms & Definitions	Meaning
Macro	Piece of software which expands possibilities of certain programs, in this case MS Word. In fact the macro's are VBA: Visual Basic for Applications.
OFT	One File Template
Template	A ready to use standard form.
URL	Uniform Resource Locator. Also internet address (starts with http://..... or https://...)





2 Using the One File Template

2.1 Starting up the OFT

You can find the OFT at the following website from where you can download it:
<<http://xxxxx.yy/OFT/oft.doc>>

Do not open the OFT in your Explorer browser, otherwise your document will be missing some items! Save it to your local drive and open it in MS Word, if you get a warning regarding opening macros then you have to permit the execution of macros.

Enabling macros and setting the correct macro protection is MS Word specific. Please refer to you MS Word manual for proper instructions.

2.2 Choosing the desired template.

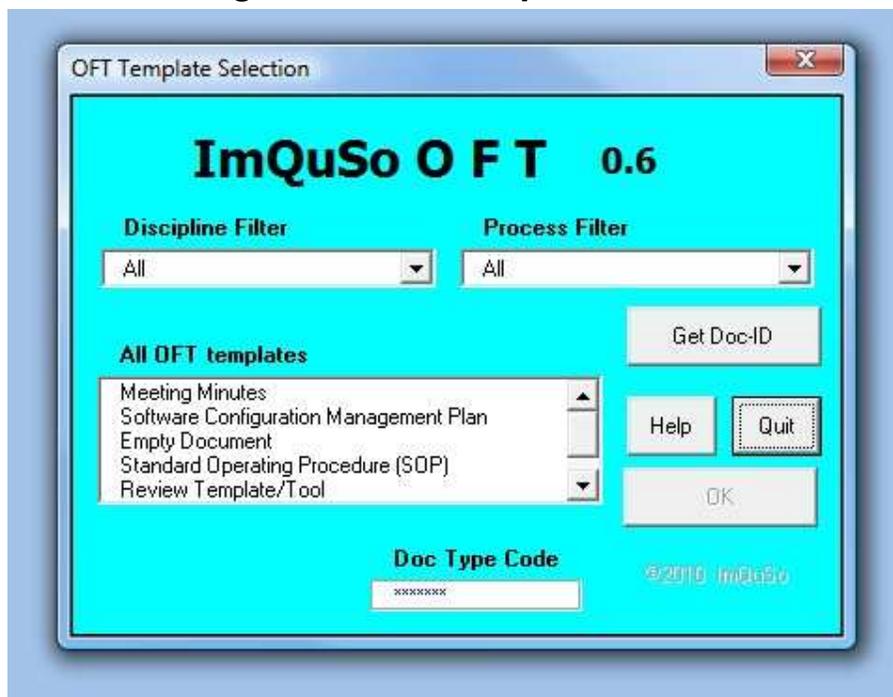
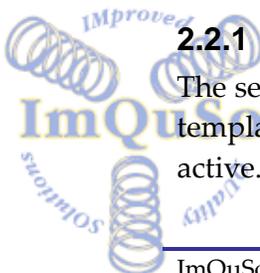


Figure 1 Template selection window

2.2.1 Template selection

The selection window shows a list of templates to choose from ("All OFT templates). Click on the desired template to mark it and the OK button becomes active.





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Each template is unique in its purpose and content. To identify the template that is used the "Doc type code" is used. The doc type code is shown for every marked template.

If you click on the OK button the selected template will be generated and a messages pops up that the document is ready to be used.

See also § 2.3 Choosing a non-OFT template.

The OFT file will be closed when the new document is available for editing.

2.2.2 Applying filters to the available template list

You can limit the length of the template selection list by applying a discipline and/or a process filter.

The filters are combined in an "And" function. E.g. when selecting discipline: Software and process: requirement Management than only Software discipline templates are shown that apply to the process area: Requirement Management. The template: Meeting Minutes will not be visible!

Selecting All for process or discipline disables part of the filter.

2.2.3 Canceling the template selection

Just click on the Quit button.

You will be asked to confirm your choice to quit the OFT tool.

2.2.4 Get a unique document identification

This button will invoke a application that generates an unique document identification so that each document created doesn't rely on the uniqueness of its name . The tool invoked will be organizational specific.

ImQuSo can supply such a tool generator!

2.2.5 Help

The button pops up a simple text box with basic help.

Inside the box is a URL that leads to more detailed help pages





2.3 Choosing a non-OFT template



Figure 2 No OFT template window

When selecting a template which is not included in the OFT, you will see a message box as displayed above.

When clicking the "Template on Intranet" button, you will be forwarded to its location on the intranet.

The OFT will close automatically after that.

Templates that are handled this way are typically non Word templates like Excel workbooks, MS Project files or even Word files with a non custom layout of styling.





2.4 Updating the OFT.

The OFT will notify you when there is a new version available when working online.

The older version OFT will be unusable when working online if there is a new version available.

If a new version is available the message looks like this:



Figure 3 New OFT available window

- **Launch Explorer for Download!:**
launches Internet Explorer with the appropriate web page. From this web page you can download the new OFT.
Remove the old OFT version as it will not work anymore once a newer version of the OFT is used (even in off line mode)
- **Quit:**
does not launch Internet Explorer and unloads the OFT from Word.

Remark: When you are not on-line this message will never appear. This because OFT need to connect to a specific website to check if an update is available.





3 Frequently Asked Questions

It is a good idea to read through this section before using the OFT the first time. Also if you are experiencing trouble the solution may be stated here.

3.1 *Where can I find the latest OFT version?*

You can find the OFT at the following website from where you can download it:
<<http://xxxxx.yy/OFT/oft.doc>>

3.2 *How to save the OFT?*

- 1) Right-click on the link to get context (popup) menu.
(left-clicking will open the document in your browser)
- 2) Select "Save Target As..."
- 3) Save the OFT to your local hard disk.
(Preferably in a macro enabled directory.)

3.3 *I have the OFT on my hard disk, what now?*

- 1) Double-click the saved OFT tool to open.
- 2) Select the department and the template type
(or "Empty Document" if the document type you want is not available)
- 3) Edit your document.
- 4) Save the document with the appropriate location with the appropriate name.
(Some organizations have a mandatory directory structure and file naming conventions.)

3.4 *Can I use the OFT with other Word versions?*

The OFT is tested for the Word versions MS Word 97 and MS Word 2007 and in both English and Dutch versions.

For not tested MS Word version a warning pops-up after generation to check the content of the generated document. Once the OFT works correctly with a newer MS Word version an new OFT version can be created to handle the new Word version as a reliable so the warning will never popup again for this Word version.

3.5 *How can I maintain/ configure the (content of) the OFT?*

There is a separate manual for OFT maintenance.





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