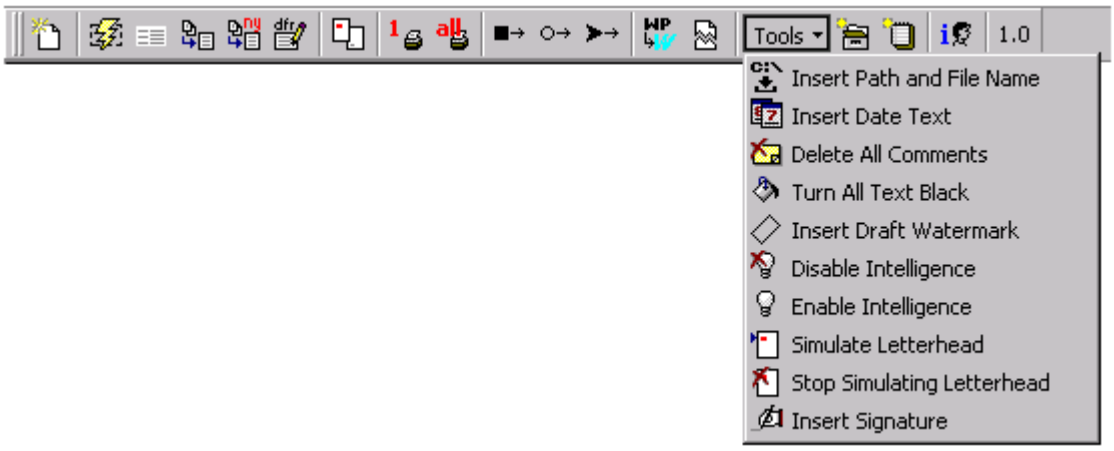
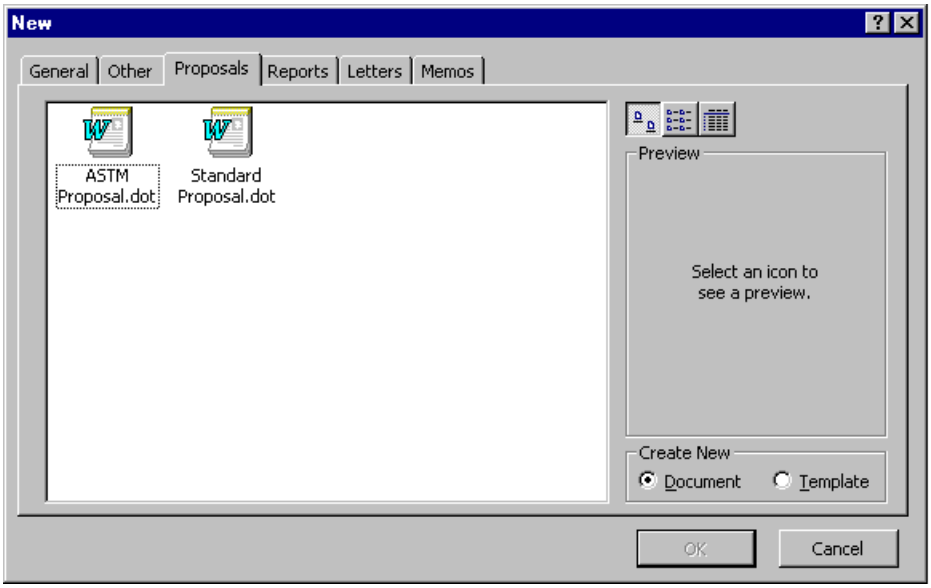
Getting Started with Lisa's Macros for Office 97

The Lisa's Macros toolbar: Below is a diagram showing the buttons in the Lisa's Macros toolbar in Word 97.



The most important thing to know is that **all** the standard documents (letter, memo, etc.) are created by clicking a single button, (the first button in the toolbar). This button is called "Create New Standard Document".

When you click the Create New Standard Document button, you will be presented with a gallery of templates to choose from (see below). The tab pages divide the templates into categories. Click on a tab page to choose a category; then double-click on a template to create a new document of that type.



Multiple toolbars: In WordPerfect 6.1, you could only have one toolbar showing at a time. Now you can have many toolbars on the screen simultaneously. (As in WordPerfect, right-clicking on the gray area in the toolbar region displays a list of toolbars to choose from.)

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Toolbar partially off-screen: Your Lisa's Macros toolbar may initially appear partially off-screen. You can easily fix this by moving the toolbar to a new location. To move it, drag the double-ridge at the left end of the toolbar. You can drag it anywhere you want; if you drag it out of the toolbar area at the top of the screen, it will become a free-floating palette.

Which button does what: The buttons in the toolbar are equipped with "tool tips". If you point your mouse at a button (without clicking on it), a small yellow description of the button will appear. Thus you can point at a button to find out what it does.

About click-and-replace fields: Most of the templates utilize click-and-replace fields. They look like this: [This is a click-and-replace field.] When you click on one and begin typing, what you type replaces the field. They are handy bookmarks with which to leave instructions to the author. When you see one of these fields, just click on it and start typing. (Try it with the sample one above. You have to click on it; using the arrow keys to move to it won't select the field.)

In case of problems: Please report any problems with the macros themselves, as well as issues with the content or format of the documents created by the macros, to the Help Desk (617.886.7575, e-mail HELP).

Descriptions of Button Functions

These descriptions explain in some detail the functionality of the buttons in the Lisa's Macros toolbar, proceeding from left to right.

- **Create New Standard Document:** Opens a dialog from which you can select any of the standard H&A templates that have been made interactive with macros. For example, click on the "Memos" tab to choose from available H&A memo templates. Double-click on the template you want to use. The macros will gather any necessary information from you and build a skeleton document.

- **Fax Label:** Inserts a Post-It-style fax label into the current document.

- **Proposal Signature Block:** Inserts a proposal signature block into the current document at the insertion point.

- **Reliance Paragraphs:** Inserts selected reliance paragraphs into the current document at the insertion point.

- **New York Tax Paragraphs:** Inserts selected New York state tax paragraphs into the current document at the insertion point.

- **Revise DFR Header:** A DFR's header contains items like the report number, project name, client and contractor names, etc. The header has traditionally proven difficult to edit successfully. This button opens a dialog containing the information in the current DFR's header, which you can then modify.

- **Set P1 to Letterhead and P2 to Second Sheet:** Word handles paper sources differently from WordPerfect. It's not possible to insert paper type codes on particular pages as it was in WordPerfect. This is the next best thing: Click this button to format the first page of your document as letterhead and all subsequent pages as second sheet. (If you want something other

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than the first page of your document to be designated as letterhead, contact the Help Desk; this will have to be done manually.)

Note that paper tray designations in Word are per printer driver. A LaserJet 4 driver is what we recommend; other printers may call their trays by different names. Contact the Help Desk to discuss options.

- **Print Current Page:** Prints the current page of the document.
- **Print All Pages:** Prints the entire document.
- **List Square Bullet:** Formats selected paragraphs as a list using a filled square bullet. (Note that you can select several paragraphs and click this button to format them all with a square bullet at the same time.)
- **List Round Bullet:** Formats selected paragraphs as a list using a hollow round bullet, as described above for square bullets.
- **List Arrow Bullet:** Formats selected paragraphs as a list using a filled arrow bullet, as described above for square bullets.
- **Attempt to Convert WP Document:** Imported WP documents have consistent formatting problems. Some are possible to fix with macros. This macro will go through the current document and attempt to fix known imported-document formatting issues. When finished, the macro will display a summary of the changes it made.
- **Fix Corrupt Document:** Copies all text from the current document into a new document, and saves the new document , replacing the old document.
- **Tools:**
  - **Insert Path and File Name:** Inserts a path and filename code at the insertion point.
  - **Insert Date Text:** Inserts the text of the current date at the insertion point.
  - **Delete All Comments:** Removes all comments from the current document. (This is mostly intended for the ASTM Phase I Report template.)
  - **Turn All Text Black:** Many templates contain red and blue text which indicate choices between possible wordings. Some printer drivers will print this colored text in grayscale rather than black, so the text comes out looking speckled. This macro reformats all text in the document to be colored black.
  - **Insert Draft Watermark:** Inserts a "Draft" watermark in the current header. Note that your cursor must be in a document header when you run the macro.
  - **Disable Intelligence:** Turns off several "AutoFormat As You Type" features, including Headings, Borders, Tables, Automatic bulleted lists, Automatic numbered lists, and Format beginning of list item like the one before it. Many people find Word's "intelligence" more annoying than it is helpful; this macro turns off the features that seem to cause the most trouble.
  - **Enable Intelligence:** Turns on the features that are turned off by "Disable Intelligence".
  - **Simulate Letterhead:** Inserts the appearance of H&A letterhead (and second sheet) into your document. This is useful if you want to fax a document electronically, but would like it to be on letterhead.
  - **Stop Simulating Letterhead:** Removes letterhead simulation objects.

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- **Insert Signature:** Inserts an image of your signature at the insertion point. For best results, position your cursor on the first blank line of a signature block. (A scanned image of your signature is required to use this. Contact the Help Desk for assistance.)

- **Write Act History:** If Act is running, creates a history item in the current Act contact. The history entry is the type of document being worked on (i.e. "Formal Report"); but you will be prompted for any additional description you would like to add.

- **Write Act Note:** If Act is running, creates a note in the current Act contact using the text that is currently selected.

- **Update Personal Info:** Although Word doesn't have a Personal Information feature like WordPerfect did, I wrote my own because I needed it in several of the standard templates. (Otherwise you'd be typing your own name and title a lot!) Click this button to enter or change your personal information.

  Tip: Many templates change their wording depending on your office. For example, the Fax Transmittal inserts different originating-office information in the header depending on your office. If you need to create a document for a different office, select that office in your Personal Information. All documents you create subsequently will treat that office as your office of origin.

  Another Tip: The dialogs you fill out to create standard documents automatically insert your personal information where possible. For example, when you create a letter, I assume it is from you, and your name and title are automatically shown on the dialog to save you from typing them. But if you primarily create documents for other people, this doesn't help you. To stop your personal information from being used in dialogs and templates, check the "Don't personalize my documents" box on the Personal Information dialog.

- **Display Macro Version:** Opens this document.

Excel Templates & Macros:

- **Time & Expense Sheet template:** This template is a pretty close replica of the H&A time and expense sheets. In Excel, choose File|New, select the "Other" tab, and double-click on "Time & Expense".

- **Add Path to Header or Footer:** Inserts the current path and filename into a header or footer, *although it is just text, not a code that updates itself.*
  - To install it, choose Tools|Add-Ins, check the box beside "Add Path to Header or Footer" and click OK.
  - To use it, choose Tools|Add Path to Header or Footer.

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