

DOCX (WORD) TEMPLATES



Clarify

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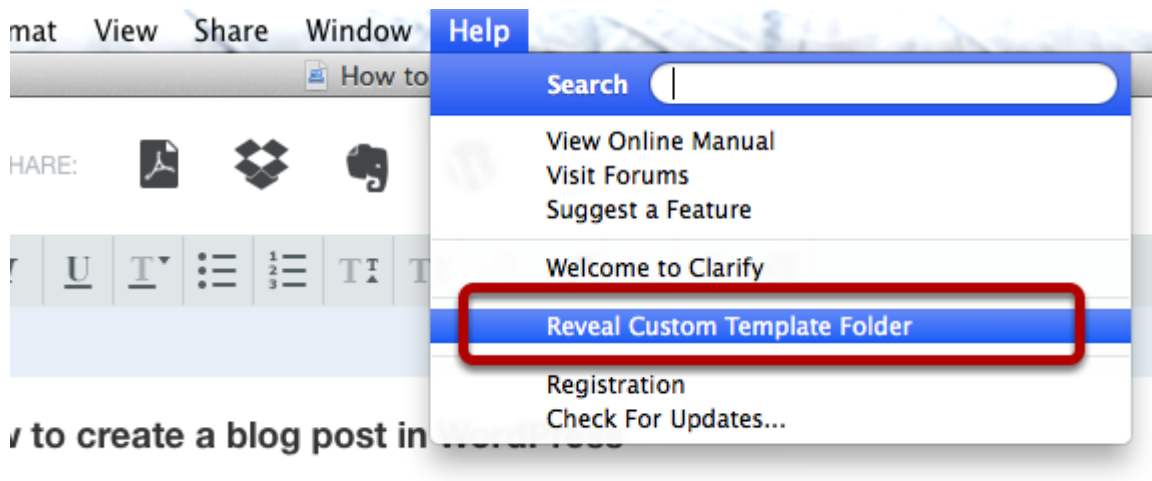
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Introduction

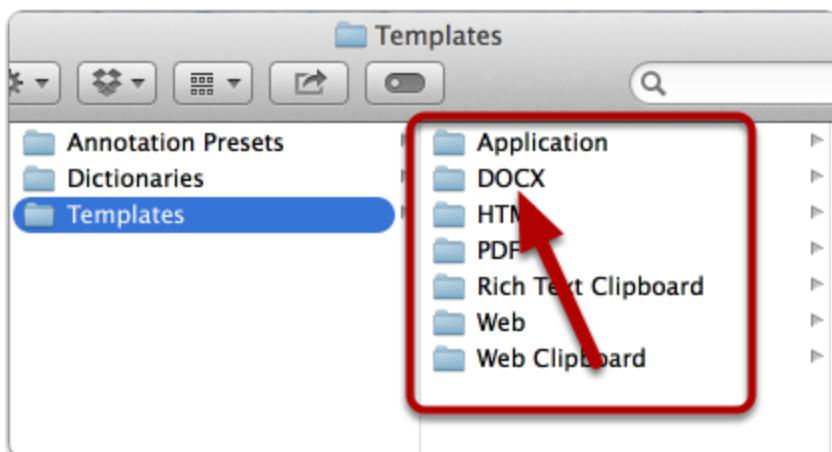
Where do I put custom DOCX templates?

The Help menu

From the help menu select **Reveal Custom Template Folder**. This will show the folder where custom templates go.



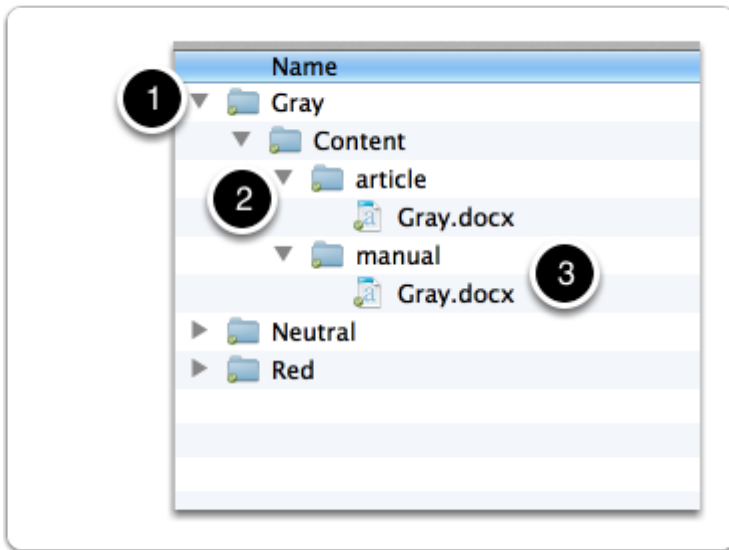
The **Templates** folder will have a number of folders. You will put custom **DOCX** templates that you create in the **DOCX** folder.



How is a DOCX template structured?

Here is the structure of a DOCX template folder.

1. The root folder is the name that will appear in Clarify.
2. The DOCX file that will be used for exporting your Clarify documents goes in the **./Content/article** folder. The name of the DOCX file is irrelevant. All that matters is that it have a .docx extension.
3. A DOCX template can also have a **./Content/manual** folder. This is not used in Clarify but can be present since Clarify DOCX templates use the same format as ScreenSteps DOCX templates.



Creating a Template

Adding styles to the template

When Clarify generates a DOCX file it assigns certain styles to the content. You will need to add these styles to your DOCX template in order for the content to look correct.

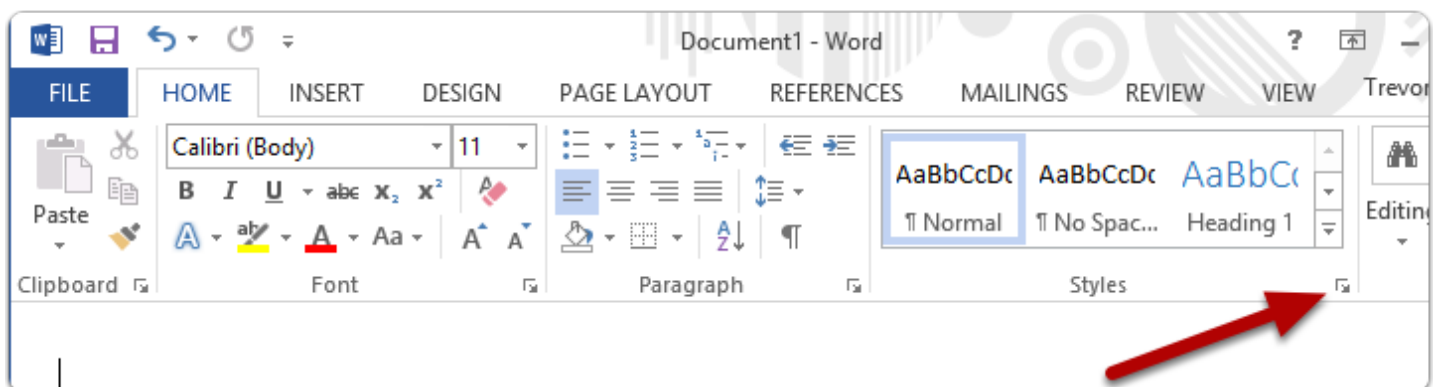
Note that some of the styles listed are only applicable to ScreenSteps and not Clarify. These styles are listed so that you can add them in case you ever want to use the template with ScreenSteps.

You will need to add the following styles to your document.

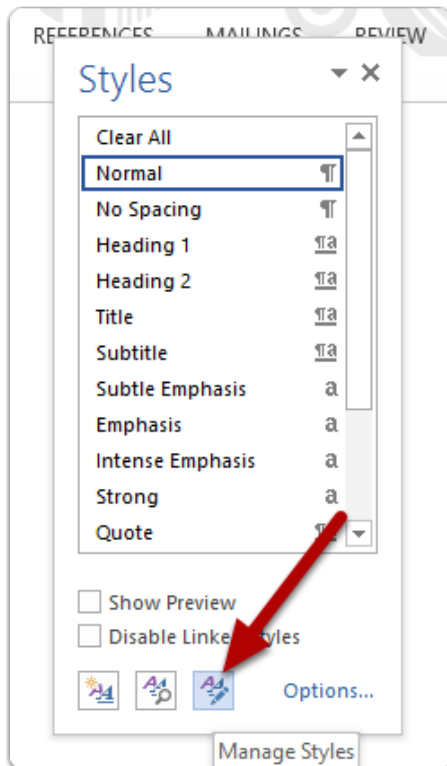
- **Chapter Heading:** Styles chapter titles. *[ScreenSteps only]*
- **Article Description:** Styles article descriptions.
- **Article Heading:** Styles article titles.
- **Step Heading:** Styles step titles.
- **Substep Heading:** Styles sub-step titles.
- **Step Instructions:** Styles step text.
- **ScreenSteps Code:** Styles code blocks in step text.
- **ScreenSteps Code Run:** Styles instances of code within paragraph text.
- **ScreenSteps List Number, ScreenSteps List Number 2, ScreenSteps List Number 3, ...:** Styles numbered lists. Create as many entries as levels of nesting your documents may have. The templates included with Clarify go up to ScreenSteps List Number 5.
- **ScreenSteps List Bullet, ScreenSteps List Bullet 2, ScreenSteps List Bullet 3, ...:** Styles bullet lists. Create as many entries as levels of nesting your documents may have. The templates included with Clarify go up to ScreenSteps List Bullet 5.
- **Step Image:** Styles step images.

Opening the Styles editor (Word 2013 on Windows)

From the **Home** tab click on the arrow next to **Styles**.

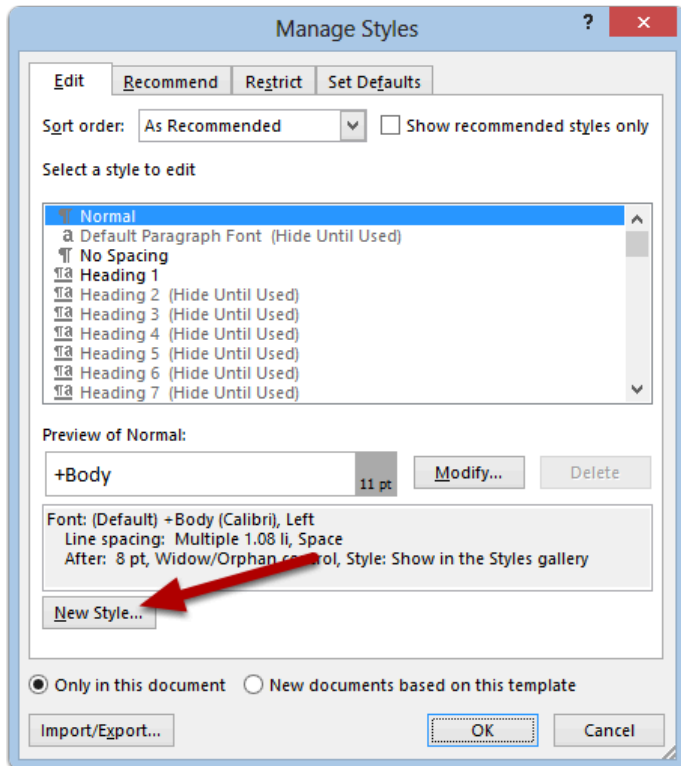


Click on Manage Styles



Manage Styles

From the **Manage Styles** window you can add the styles you need to by clicking on **New Style**.

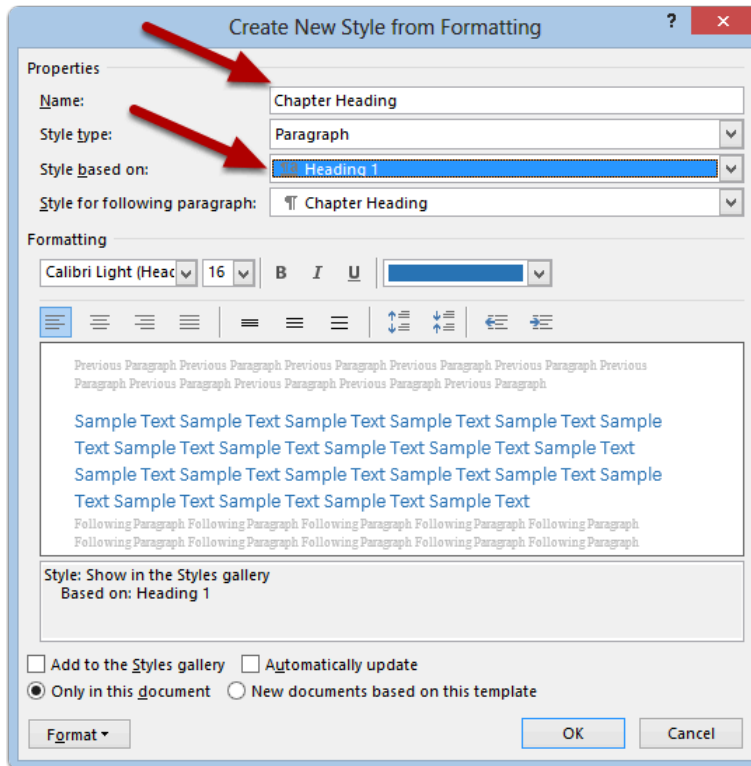


Chapter Heading, Article Heading, Step Heading, and Substep Heading

For the heading styles you can base them off of existing heading styles that come with Word.

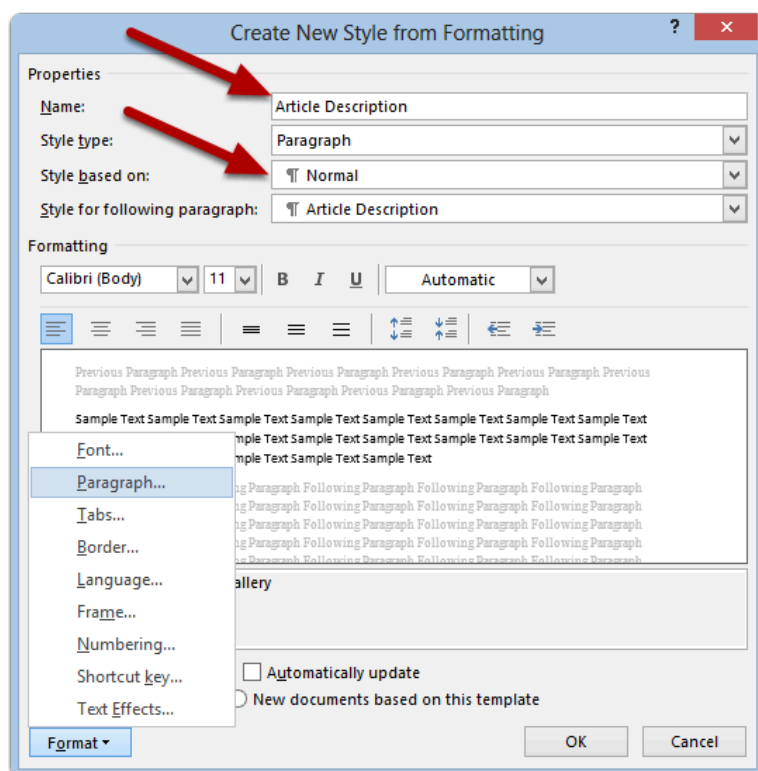
If you are creating a manual template then base **Chapter Heading** on **Heading 1**, **Article Heading** on **Heading 2**, etc.

If you are creating an article template then you can base **Article Heading** on **Heading 1**, **Step Heading** on **Heading 2**, etc.



Article Description and Step Instructions

Article Description and **Step Instructions** can be based off of the **Normal** style. If you want to make any changes to how the text appears then use the **Format** menu to change text and paragraph properties.

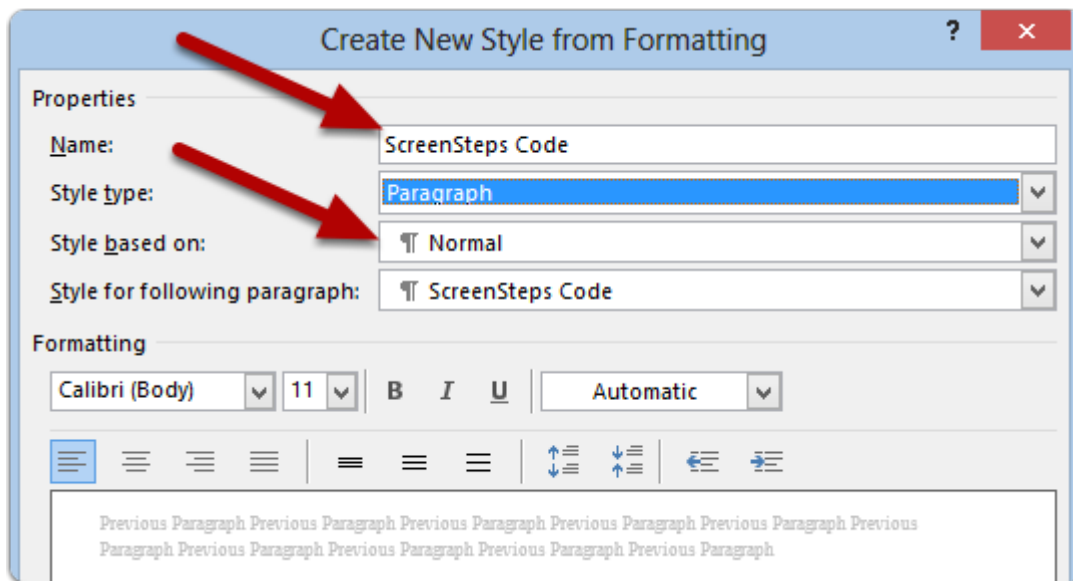


ScreenSteps Code

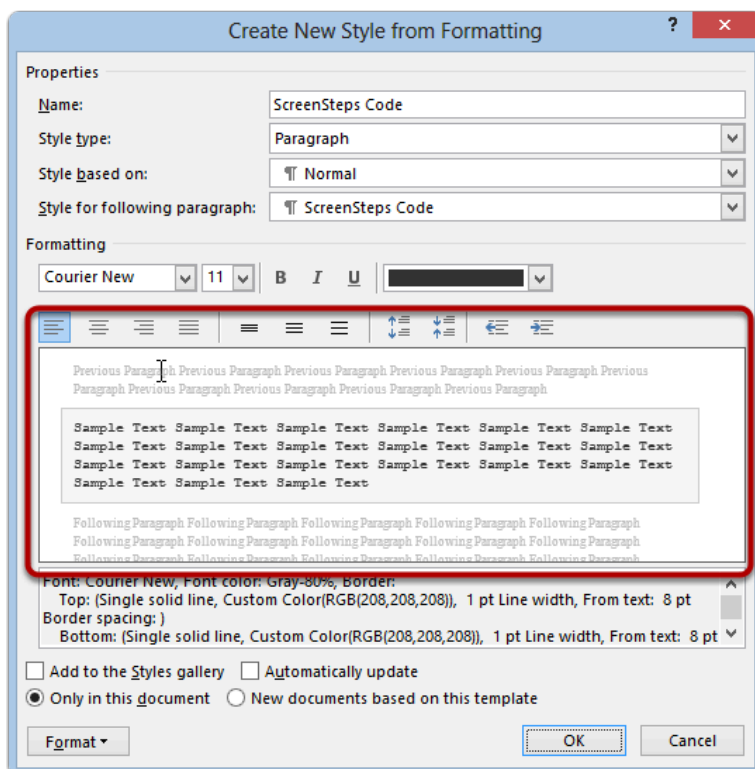
The **ScreenSteps Code** style is used to format code blocks and is based on the **Normal** style.

Here are some baseline settings you can use for code blocks:

- Font: Courier New, color set to 51,51,51.
- Border: Box with a solid line set to 1 pt thick with color set to 208,208,208. The border padding is set to 8 pt on top, left, bottom, and right. The shading is set to 245,245,245. This provides the background color.



Code Example

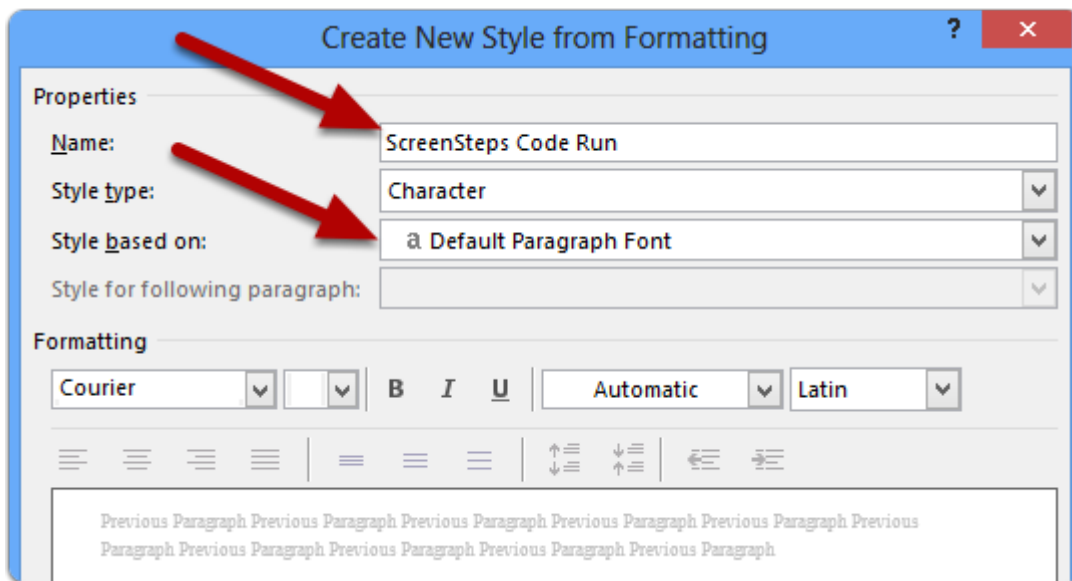


ScreenSteps Code Run

The **ScreenSteps Code Run** style is used to format instances of code within a paragraph and is a **Character** type based on the **Default Paragraph Font** style.

Here are some baseline settings you can use for code blocks:

- Font: Courier New, color set to 187,0,0.
- Border: Go to the Shading tab and set the Fill to 224,224,224.

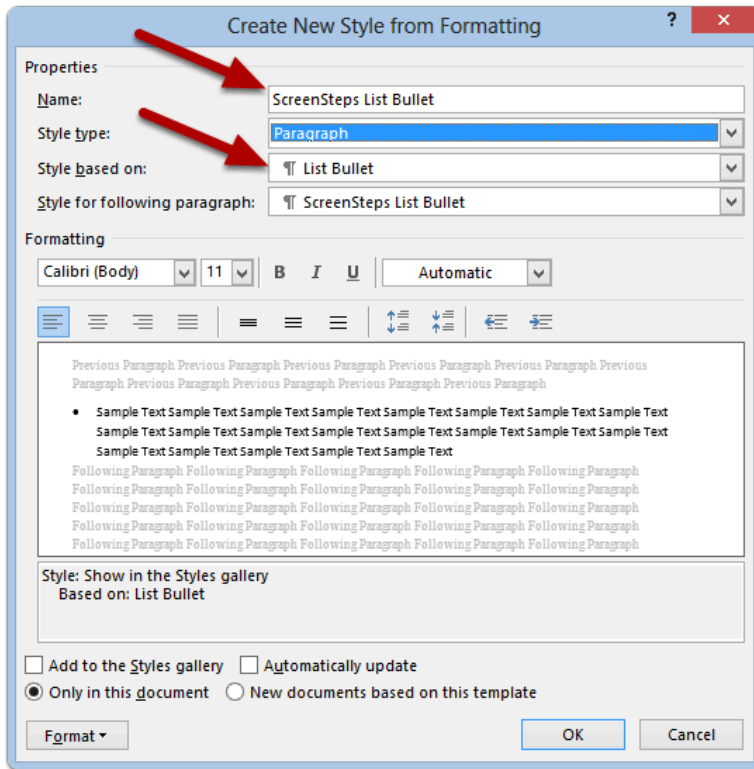


Step Image

The **Step Image** style can be based off of **Normal**. Use this style to add padding around the image. For example, you might set the Space Before and Space After in the paragraph settings to 18pt.

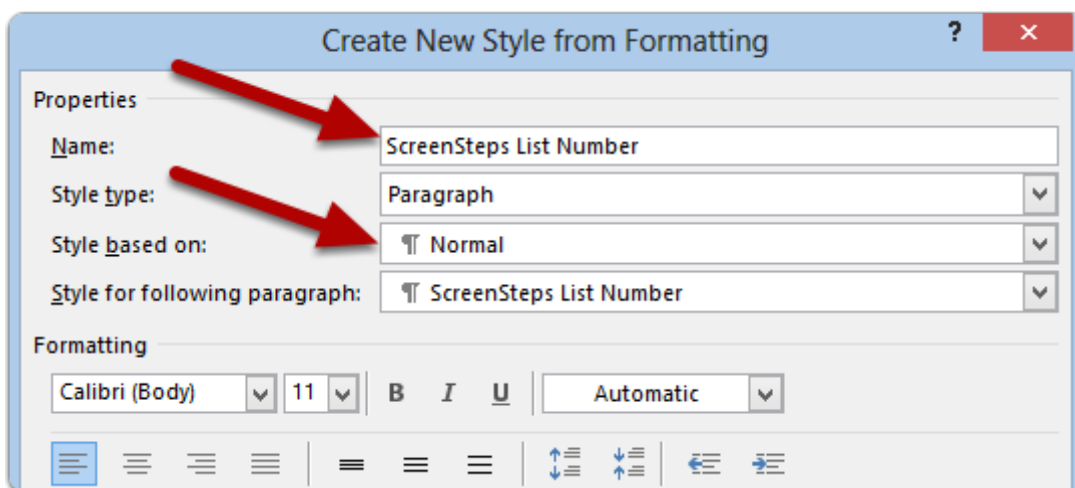
ScreenSteps List Bullet, ScreenSteps List Bullet 2, ScreenSteps List Bullet 3, ScreenSteps List Bullet 4, ScreenSteps List Bullet 5, ...

The **ScreenSteps List Bullet** styles can be based on the **List Bullet** styles included with Word. Word defines all the way up to **List Bullet 5**.



ScreenSteps List Number, ScreenSteps List Number 1, ScreenSteps List Number 2, ScreenSteps List Number 3, ScreenSteps List Number 4, ScreenSteps List Number 5, ...

The **ScreenSteps List Number** styles need to be created by hand and based on **Normal**. DO NOT base them on **List Number**. You will need to specify the tab and numbering settings.

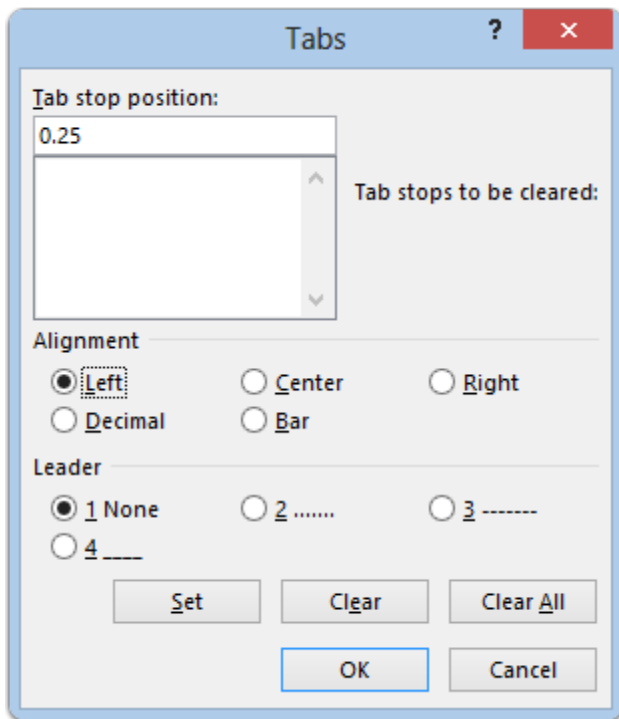


Example Settings

Here are some example settings for list numbers.

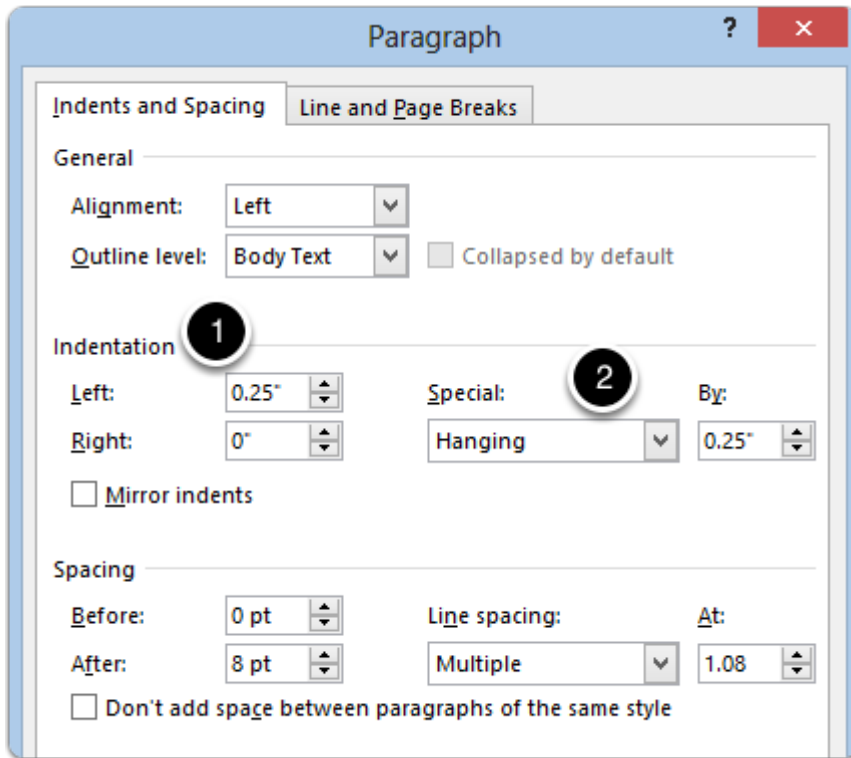
Format > Tabs

For the Format > Tab settings you can start at 0.25" for level 1 and then move up in 0.25".



Format > Paragraph

In the Paragraph settings set the **Left indentation** to 0.25". Set **Special** to Hanging by 0.25".



Paragraph ? x

Indents and Spacing | Line and Page Breaks

General

Alignment: Left v

Outline level: Body Text v ☐ Collapsed by default

Indentation

Left: 0.25" v Special: Hanging v By: 0.25" v

Right: 0" v

☐ Mirror indents

Spacing

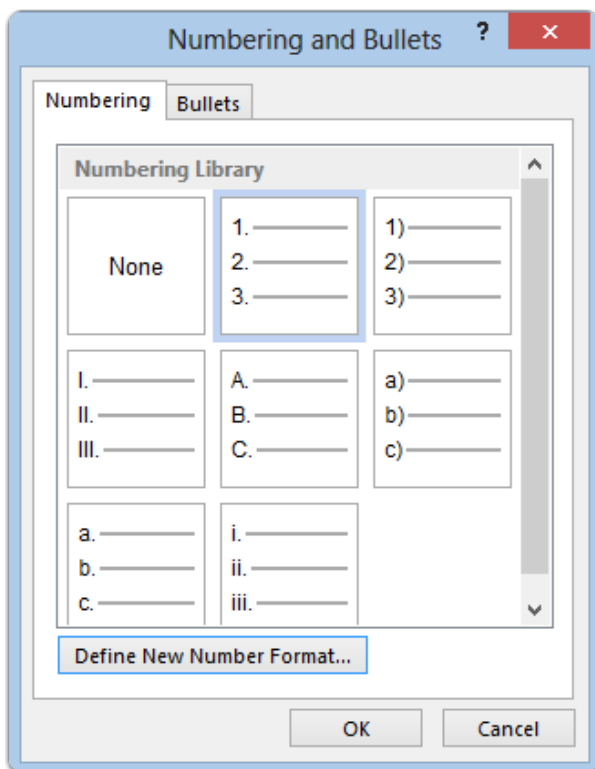
Before: 0 pt v Line spacing: Multiple v At: 1.08 v

After: 8 pt v

☐ Don't add space between paragraphs of the same style

Format > Numbering and Bullets

Select a numbered list format for your lists.



Numbering and Bullets ? x

Numbering | Bullets

Numbering Library

None	1. _____ 2. _____ 3. _____	1) _____ 2) _____ 3) _____
I. _____ II. _____ III. _____	A. _____ B. _____ C. _____	a) _____ b) _____ c) _____
a. _____ b. _____ c. _____	i. _____ ii. _____ iii. _____	

Define New Number Format...

OK Cancel

Adding placeholders to an article template

Content placeholder

For an article template add the text **[[SCREENSTEPS_ARTICLE]]** to the document. This text should have no styling applied to it.



Header variables

You can place the **[[ARTICLE_TITLE]]** variable in the Header section of the template. The name of the Clarify document will be inserted in place of the variable.

Footer variables

In the footer you can use the **[[ARTICLE_TITLE]]** and **[[FOOTER_TEXT]]**. The **[[FOOTER_TEXT]]** variable is the footer text that you enter when configuring a sharing account in the Share preference pane.

Troubleshooting

If your variables are not being replaced when you export then it may be that Word has split the variable text up into multiple blocks of text inside of the template file. Try retyping the variable name again and then saving the document.