

Creating a Document Management System in Word

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The key to an efficient run business is to have everyone doing the same thing using the same tools, especially in the office setting. How many times have you looked for a form that your company uses on a regular basis and can't find it? Wouldn't it be nice if you had all your forms available at a click of a mouse while you are working in Word? This is what this FAQ is about. Keep in mind that the skills necessary to create templates for re-use is assumed here and not covered in this document. The Word MVP FAQ has additional FAQ for that purpose and if you are not proficient with creating on-line forms or templates, please visit the following link then come back to this page.

[Creating On-Line Forms](#)

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OVERVIEW OF DMS TEMPLATE FILE

The brains of this operation is a template file that consists of the following:

- A UserForm with the required buttons on it, along with the necessary code to open the desired template
- A toolbar with a button that is designed to open the UserformDMS menu

This template file is placed in your Startup folder and is run every time you open Word. If you are working off a network and want everyone to have access, each computer will need to set their "Startup" folder to that server, path, and folder. This is done by clicking the "Tools" menu, selecting "Options", clicking the "File Locations" TAB, selecting the "Startup" folder and clicking the "Modify" button. Browse to the desired network folder where this template exists and select it.

Usually the best way to organize your template forms and this template file is to have a main folder on a network drive somewhere. Place this template file in that folder. Then create a subfolder where each of the companies' templates are stored.

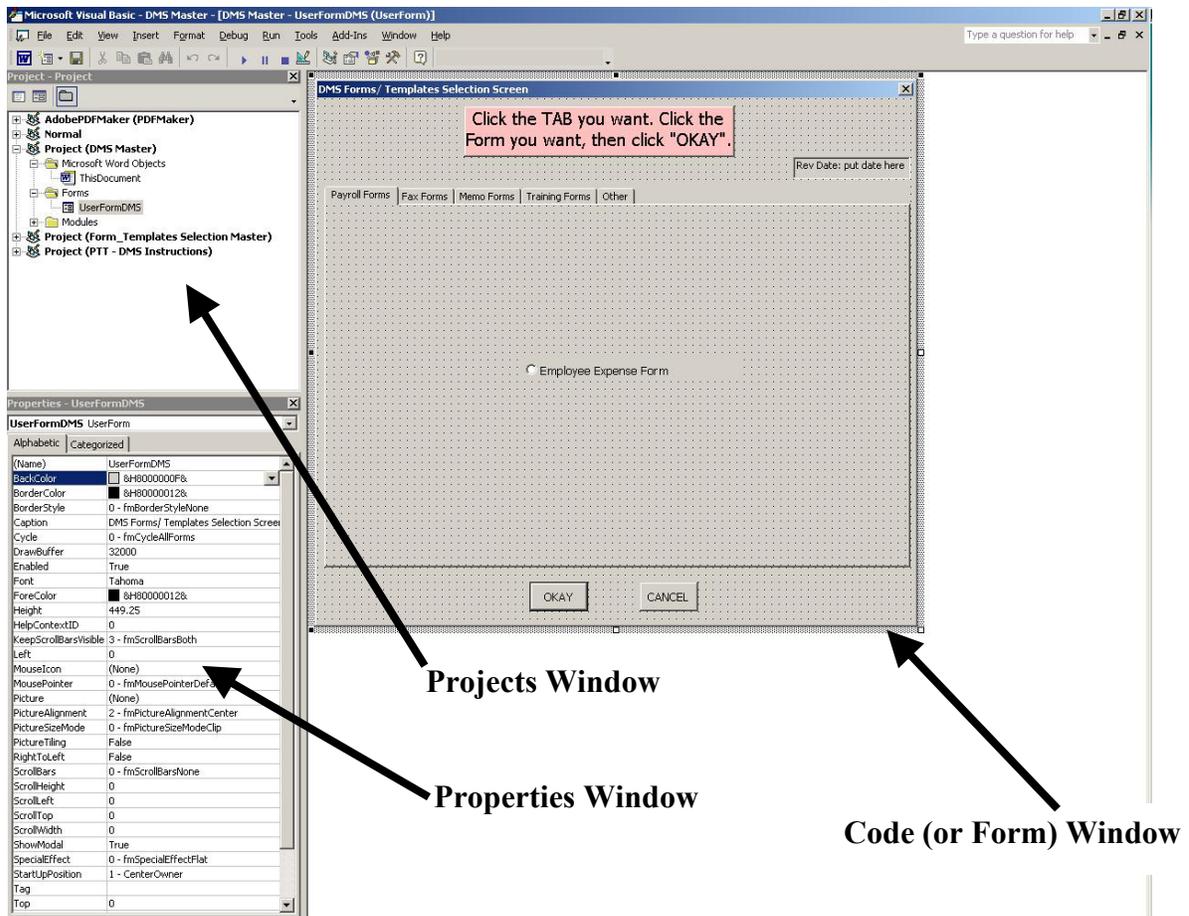
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Modifying the Template File

When you are ready to modify the provided template file, or need to revise your existing one, you will need to open Word, click “File”, “Open”, browse to the folder where this template file is located, and select it. Keep in mind that you will see nothing but a blank screen since this template merely consists of the tools necessary to access your forms. The sections below will describe how to change this template to meet your needs as you create more template forms.

RECOGNIZING VBA

The first step to creating this Document Management System (DMS) is to recognize the VBE Window screen, which is accessed by pressing ALT+F11 with Word open. Keep in mind that this will not teach you to be programmers, just how to maintain the DMS System.



Each VBA Project (or file) you have open is visible in the top right screen. The bottom left screen is the Properties Window showing the properties of the object selected in the Projects Window. These two windows can be accessed by clicking the “View” menu.

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Basically the **UserFormDMS** form is a multi-tab form with an **OKAY** button at the bottom used to open the selected form/template. The **Cancel** button merely closes the form.

OVERVIEW OF UserFormDMS FORM CODE

The main code being run is tied to the **OKAY** button. Below is a listing of the code and a brief explanation of how it operates.

```
Private Sub CmdOpenUserFormDMS_Click()
Dim oCheck As MSForms.Control
Dim x As Long

For x = 1 To 5
    Set oCheck = Me.Controls("OptButton" & x)
    If oCheck.Value = True Then
        Documents.Add Template:= _
            "D:\Stuff\Web Page Stuff\" & oCheck.Caption, _
            NewTemplate:=False
    End If
Next x
Unload UserFormDMS
End Sub
```

The first line of the code is the name of the macro. Every macro starts with a “Sub” and ends with an “End Sub”. The lines in between are the real code.

Basically this code declares a variable “oCheck” for all of the option buttons (radio buttons) on the form. This sample only has one button on each TAB (total of 5), but you can have as many as you can fit. The next line declares a variable for the total number of buttons (in this case 5).

The next set of lines (from the “For x = 1 to 5” through “Next x” looks to see which button was clicked. Based on the property name of the button, it goes to the desired folder (could be a network folder) and opens the file that has the same name as the caption property of that button. This brings to light a very important part - ***The caption property of each button MUST be exactly the same as the file name!*** That is why it is a good idea to give a reasonable descriptive name of your file (one long enough to make sense, but not too long that the caption property is too big for the form). In the example above, “OptButton1” on the first TAB has a Caption property of “Employee Expense Form”. The actual file name in the respective folder is “Employee Expense Form.dot”. Keep in mind that this code is designed to create a new document from an existing template. It is NOT designed to open documents. We will visit some of these Form design specifics below.

The last thing the code does is to unload (or close out) the UserFormDMS. We will show you later how easy it will be to access this form by putting a button on a toolbar that is accessed every time you open Word.

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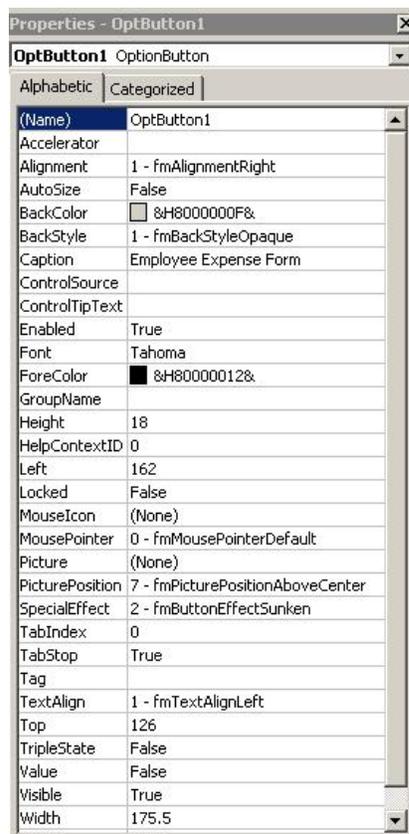
Even though the code might look somewhat confusing, all you will need to do to modify the code to fit your specific needs are:

- Change the “5” in the “For x = 1 to 5” to the number of option buttons (forms) you will have.
- Change the path (“D:\Stuff\Web Page Stuff\”) to the path of the templates you are using.

The only other thing you need to do is to create new option buttons on the desired TAB. This next section will provide those instructions.

UserFormDMS FORM DESIGN SPECIFICS

Before we get into adding new objects to our form, let’s review the VBE window for a specific object. The figure below shows the Properties Window of the option button on the first TAB.



OptButton1 is an OptionButton object

The **Name** is **OptButton1** - keep in mind that when you create new OptionButtons, the name will be “OptionButton1”. You will need to change it to “OptButtonx” as described below.

The **Caption** property is “Employee Expense Form”

The default properties of a new button will not need to be changed. All you will need to do is to rename the button to **OptButtonx**, where “x” is the next number in sequence of buttons you have on your various TABs. Then you need to change the Caption property to be exactly the same as the file name of your template. A good idea is to have Windows Explorer open to the templates folder, select the file, highlight and copy the file name (before the “.dot”) and paste that information into the Caption property box. That way you ensure the names are exactly the same. **Do NOT** copy the “.dot” and include it as part of the Caption!

Renaming/Adding TABs

The template provided has 5 TABs for sample purposes. If you have specific needs, you can easily change the TAB names by clicking on the TAB itself and changing the “Caption” property in the Properties Window. You can also access the “Rename” function by right-clicking on the TAB name.

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To Add, Delete, or Move TABs, right-click on the TAB area and select the desired option. *Keep in mind that if you delete a TAB, you will need to renumber in sequential order your remaining option buttons!*

Adding a New Button to Your Form

Once you have created your new template, place it in the desired templates folder that your code calls for then add a new button on your form to access the template. The steps for creating a new button are:

1. Open the template file that contains the UserFormDMS.
2. Press ALT+F11 to enter the VBE Window
3. Open the “Forms” project up until you see the UserFormDMS form, then double-click on it
4. Click the desired TAB that you are going to add a form button to.
5. Select an existing form option button, press CTRL-C to copy it, then CTRL-V to paste it.
6. Select the new button and move it to the desired location.
7. Click inside the “Name” property and change the name to **OptButtonx**, where “x” is the next number in sequence of buttons. For example if you only have five buttons total on all TABs, then this button will be named OptButton6
8. Change the “Caption” property to the exact same name as your new template file.
9. Double-click the “OKAY” button to access the code.
10. Change the “5” in the “For x = 1 to 5” to “6”.
11. Close the VBE window, save your template, and close it.

Your new form should now be ready to be accessed from your DMS System.

Renaming an Existing Form

There might come a time when the boss wants the actual file name of one of your template forms changed. If that happens, you will need to also change it in the Caption property of your DMS template file. The steps for renaming are quite simple, but described below:

1. Open the template file that contains the UserFormDMS.
2. Press ALT+F11 to enter the VBE Window
3. Open the “Forms” project up until you see the UserFormDMS form, then double-click on it
4. Select the desired option button on the desired TAB.
5. Click inside the “Caption” property and change it to the new name of your form.
6. Close the VBE window, save your template, and close it.

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Deleting an Existing Form

There also might come a time when you no longer need one of your forms. The steps to delete a form, even though easy, involves a little twist. The steps are described below:

1. Open the template file that contains the UserFormDMS.
2. Press ALT+F11 to enter the VBE Window
3. Open the “Forms” project up until you see the UserFormDMS form, then double-click on it
4. Click the desired TAB that you are going to delete the button for.
5. Make note of the “OptButtonx” button number you are about to delete. For example, if you have 50 template forms and are deleting OptButton15, remember the 15. You will need to use it later.
6. Select the button and press “Delete”.
7. Go to the TAB with the last button you created (OptButton50) and select it.
8. Change its Name property to “OptButton15”.
9. Double-click the “OKAY” button and change the “50” in “For x = 1 to 50” to “49”.
10. Close the VBE window, save your template, and close it.

The reason for this additional change is that the code iterates through all “OptButtonx” objects between the starting and ending number to find the one that is set to “True” so it can go and open the form with the same name as the Caption. If an optionbutton is missing, the code will fail. The actual number of each button is not important, just the fact that they are sequential and the total number of buttons is the same as the number in the “For x = 1 to ...” line of code.

UserFormDMS.dot File Specifics

As mentioned before, this file consists of a UserForm (UserFormDMS) and the necessary code behind the “OKAY” and “Cancel” buttons to access the various templates. This file

also consists of a toolbar  and a code module (DMSMaster) with one macro used to open the Section Screen. The code reads:

```
Sub OpenDMSForms()  
    Load UserFormDMS  
    UserFormDMS.Show  
End Sub
```

The code basically “loads” the userform into memory then “shows” it. If you recall, the code to open a specific form “unloads” the userform so it is no longer visible. If you need to open another template, click the button again and select another form.

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Summary of DMS Instructions

Let's review the necessary steps to successfully use the DMS System provided (or one you create yourself).

- The main template file needs to be placed in a folder specified by your Startup options. This way the template is opened each time Word is opened, providing you access to the toolbar button and thusly the forms.
- The actual template forms you use need to be in another folder (preferably a subfolder of the folder above). If this folder location changes, the code needs to reflect this change.
- If you add a new form/button, you need to change the Name property to the next OptButtonx number as well as change the code behind the OKAY button to reflect the added form (add 1 to the latest number).
- The caption property of the button needs to be the EXACT same name as your template form you want to access (minus the “.dot” extension).

One additional thing you must keep in mind. Since this system is designed to allow everyone access to your various company forms, the only way to update the **DMS Master.dot** file is to have everyone out of Word. Since this file is opened automatically when a user opens Word (it is in the Startup Folder), all users **MUST** close Word to update this file. You can always make a copy, make the needed changes, then update the file after hours. It is really a small price to pay to streamline your word-processing needs.

We hope that this has provided you a good introduction into creating your own Document Management System. If you would like, PTT, Inc. would be more than happy to create a custom system for you. The small amount of time (and cost) spent upfront is easily overshadowed by the cost-savings of the system.

If you have any questions, please feel free to contact Bill Foley, Professional Training Technologies, Inc. at info@pttinc.com.