

# TOF APPROVAL EMAIL TEMPLATE INSTRUCTIONS

(Windows)

**Purpose:** This "cheat sheet" is a do-it-yourself guide for creating TOF approval-via-email requests that reflect our distinctive brand within the broader Cisco branding, and also play well with browsers as well as Outlook.

**Scope:** These directions are written with the TOF approval requests in mind, but many of the principles apply to any email template for BE, such as newsletters.

**Note:** Although often used in a general fashion, in this document the term "template" refers to a piece of boilerplate documentation, often indicated by a particular file extension, that the user saves as a "document" under a different name and with the appropriate file extension. For example:

*What is a template?*

Application	File Extension	
	Template	"Document"
Word	.dotx, dotm	docx
Excel	.xlts, .xltn	.xlsx
Outlook	.oft	.msg
PowerPoint	.potx, .potm	.ppt
Visio	.vst	.vsd

**Methodology:** This document provides two methods of producing the desired result:

- [Making the changes directly in Outlook](#)
- [Making the changes in Word](#)

There might be other methods of producing this result, but my vigorous and far-flung research has not revealed any. These instructions are workarounds that I have developed on my own.

Template / Word / Outlook frequent-flyers might find these additional topics useful:

- [I Want More Toolbars!](#)
- [Making Templates Accessible](#)

## Making Revisions Using Outlook

1. Locate your desired Outlook template on your hard drive.

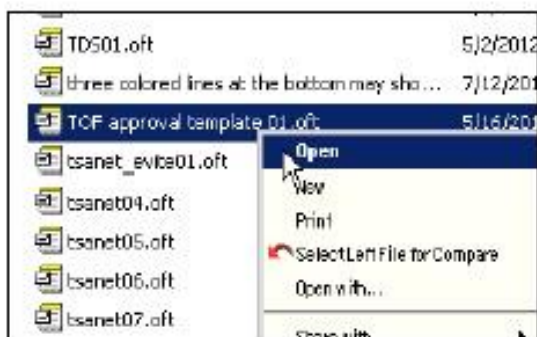
### *Where are my Outlook templates?*

Computer > System (C:) > Users > *yourname* > AppData > Roaming > Microsoft > Templates  
Frequent users might want to [make these templates more accessible](#).

### *What if I don't have a template for this?*

You can open an Outlook message that is similar to what you want, then use "[Save As...](#)" to save it as a template as described in Step 5 below.

2. Right-click on it and select "Open".



3. The file will open and you will immediately be able to edit it directly from Outlook. Few editing choices will be available for you unless you have specifically made those toolbars visible (see [I Want More Toolbars!](#)).
4. When editing, be careful. Just as at the zoo you wouldn't poke a loose tiger with a stick, don't make any changes here that might affect how the preformatted tables are set up. These preset tables are as unpredictable and excitable as tigers, so keep your changes minor and send yourself a test. Better yet, use the Word method (the tigers there are slightly less ferocious).
5. Send now, or save. Tip: When sending, send it to yourself first (include a browser email address) to make sure everything is the way you want it. To save, be sure to select "Save As..." and choose the .oft extension; by default it is saved in your Templates folder.

## Making Revisions Using Word

1. Open the template with which you want to start. See the first step at [Making Revisions Using Outlook](#).
2. Hover over the beginning of the *body* of the email until you see the mark (⊕) that indicates "A Table Is Here!" (this is easier if your gridlines and formatting marks are visible; see [I Want More Toolbars!](#)).
3. Click on it; the *body* of the email template should be highlighted.

**Important:** Avoid the imposter lurking nearby! Do not click on the wrong ⊕! The imposter will make you copy two extra "invisible" columns.

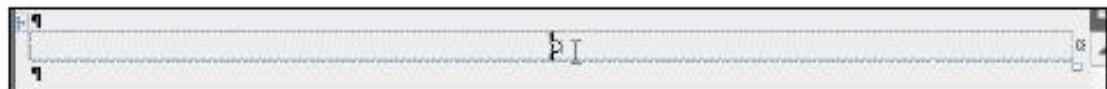
**Clicking on Imposter:**



**Clicking on Genuine:**



4. **CUT** it to your clipboard. Your Outlook message should now contain a blank table, and look like the one below (if your formatting marks are turned on) :




5. Open a new, blank Word document, and paste in the contents of your clipboard. In your Word document it should look like the Genuine example, not the Imposter example with two extra columns:

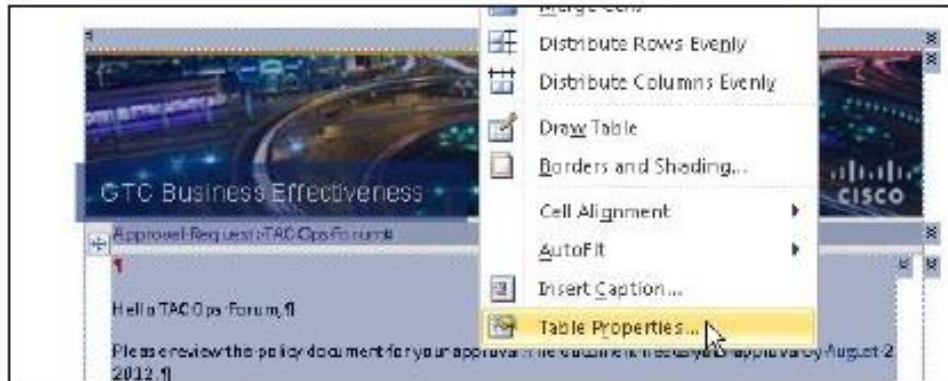
**Genuine:**



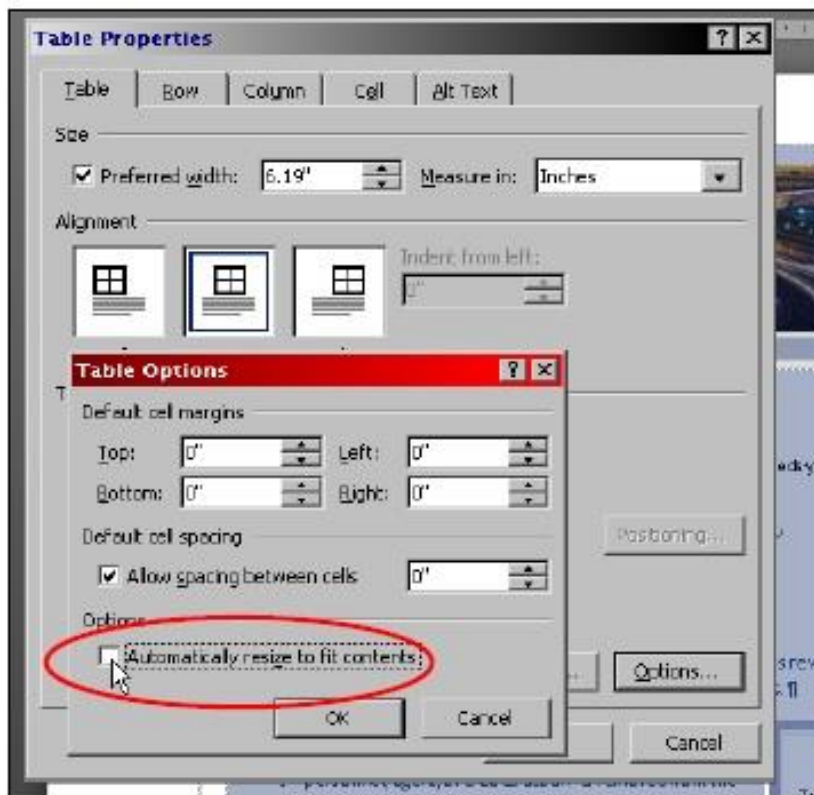
**Imposter:**



6. Immediately highlight the entire table you've just pasted in (click the ) and use right-click to select Table Properties:




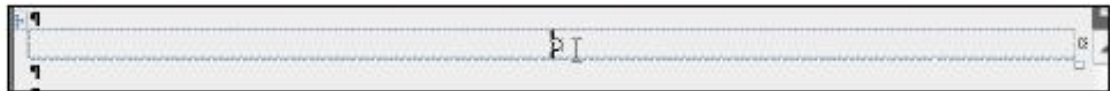
In the Table Properties box, click on Options, and then make sure that the box at "Automatically resize to fit contents" is UNCHECKED.



Say OK until you're out of "OK?" boxes.

7. Make your changes to the information in the table in the Word document and save it to a convenient location.

8. Highlight the table again using the , and copy it to your clipboard.
9. Go back to your Outlook document, place your cursor in that empty one-row, one-column table—



—and Paste.

10. Save it as a template (“Save as...” with file type “.oft”). The document should remain open; go ahead and send it to yourself at both your Outlook email address and to a browser address, then review each version to make sure they meet the appropriate standards.
11. When your end result is in good shape, you can click on the template to open it, and fill out the appropriate Outlook fields and send it.

## I Want More Toolbars!

### Word

From a Word document: File > Options > Customize Ribbon. From this dialog box many things are possible. Here’s what mine looks like today – I have many options visible, and have assigned keystrokes to often-used commands:

