Technical Reference Guide

UBM Word Productivity Suite (Template + Add-in + Loader)

Contents

1. Introduction

The UBM Word Productivity Suite enhances Microsoft Word with structured authoring tools, macros, and automation features. It consists of:

- **UBM-2024d Template (.dotm)** – Productivity features, DML menu, macros, styles.

- **UBM-2026a Add-in (.dotm)** – Auto-update, smart text embedding, extensibility.

- **AAA-UBM-Loader (.dotm)** – Lightweight loader that removes older add-ins during Word restart.

2. Installation

2.1 Template Installation

- Copy UBM-2024d-Template.dotm into:
  C:\Users\<UserName>\Documents\Custom Office Templates

- Access via **File → New → Personal** in Word.

- Pin template for convenience.

2.2 Add-in Installation

- Copy UBM-2026a-Add-in.dotm into:
  C:\Users\<UserName>\AppData\Roaming\Microsoft\Word\STARTUP

- Restart Word.

- If not visible, enable via **File → Options → Add-ins → Manage: Word Add-ins → Go → Tick Add-in → OK**.

2.3 Loader Installation

- Copy AAA-UBM-Loader.dotm into the **Word STARTUP** folder.

- Loader ensures old add-ins are removed during restart.

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3. Uninstallation

- Close Word.

- Delete template from **Custom Office Templates**.

- Delete add-in and loader from **Word STARTUP**.

- Restart Word to confirm removal.

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4. Updating

- Download latest versions from UBM website or click 'Check for Updates' in Menu

- Replace files in respective folders.

- Restart Word.

- Confirm updated template loads and macros/styles reflect changes.

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5. Features

5.1 Template (UBM-2024d)

- **DML Menu**
  - Start Standard Document / Start Memo
  - Control TOC levels (1–2)
  - Department header colours (Prod, Corp, Club, Net)
- **Macros**
  - Parameter table (Ctrl-Alt-P)
  - Instructions table (Ctrl-Alt-I)
  - Date/time insertion (Ctrl-Alt-D, Ctrl-Alt-T, Ctrl-Alt-W)
  - Screenshot callouts (Ctrl-Alt-S, Ctrl-Alt-R)
  - Cross-references (Ctrl-Alt-J)
- **Shortcut Keys**
  - Headers (Level 1–5)
  - Bullets & Numbered Lists
  - Promote/Demote headings
  - Formatting styles (Memo, Filename, Glossary, Greyed-out, Action, Parameter)
  - Cheat Sheet (Ctrl-Shift-C)
- **Styles**
  - DocumentTitle, DocumentSubtitle, DocumentAddress
  - Normal, Indents, Leadin, Lists
  - CommandLine styles (CommandLine, User Input, Example, Key, Volatile, Highlight, Footnote)
  - Project header formatting (Ctrl-Alt-B)

5.2 Add-in (UBM-2026a)

- **Updater**
  - Auto-update from UBM website (automatic/manual)
  - Upgrade attached template

- **Smart Text Embedding**
    - Upload to database
    - Refresh from database
    - Embed trigger text

5.3 Loader (AAA-UBM-Loader)

- Deletes older versions of add-ins during Word restart.
- Ensures clean environment.

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6. Use Cases

- Enterprise teams standardizing document formats.
- Project documentation with structured headers and TOCs.
- Automated rollout of updates across departments.
- IT teams managing version control of Word templates.

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7. Security

- Templates and macros are **digitally signed**.
- Certificates are installed on the machine to trust macros.
- Users can enable signed macros without lowering global security settings.

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8. Troubleshooting

- **DML Menu not visible** → Check Add-in is enabled in Word Options.
- **Macros disabled** → Ensure certificate is installed and trusted.
- **Old versions persist** → Verify Loader is installed in STARTUP folder.
- **Formatting issues** → Remove section breaks before copy-pasting between documents.