

Orientation Workbook Customizing and Personalizing Instructions

Download this Personalizing sheet, the Orientation Workbook, the Implementation Guide and the Power Point program and file them in one folder so they are easy to find.

Personalizing the Orientation Workbook is a simple three step process.

- (1) Save the document files to your hard drive,
- (2) Modify the Workbook with your specific Chapter information, then...
- (3) As each new member joins just personalize it with his name and the name of his mentor.

Step 2 will take about 30 minutes depending on the amount of editing you make to the Chapter section. You complete Steps 1 and 2 just one time. As the Chapter changes (i.e. new officers or updates to the Chapter schedule) additional editing would be needed.

The third step is a five-minute task and is completed each time a new member joins.

Step 1 > Immediately save the New Compatriot Orientation Workbook with the revised name shown here. This will preserve the Master as you edit it.

Current doc name		New Doc Name
KYSSAR Orientation Workbook MASTER	SAVE AS >>	<i>Orientation Workbook Template</i>

Then make all edits in this renamed document *Orientation Workbook Template*.

Step2 > To ease making the information specific to your chapter, follow these steps.

You can use the **Find/Replace** function, and with a few keystrokes easily add chapter specific information in all the appropriate areas.* For example, all instances of the chapter name, website, and chapter president's name change automatically.

* If you are uncertain how to do the replace actions, instructions for both the PC and MAC follow the example at the end of this description.

- **Entering your chapter name:**
 - Enter "Insert Chapter Name" In the **Find** text box.
 - Enter your Chapter's name in the **Replace** window.
(Be sure to include the word "Chapter")
 - Click **Replace All**
 - 27 locations in the document will automatically update.
- **Entering your chapter website address:**
 - If your chapter does NOT have a website. Skip this step.

Process to personalize the Orientation Workbook (Apr2020)

- Enter “Insert Chapter Website Address” In the **Find** text box.
- Enter your Chapter’s website URL in the **Replace** window.
- Click **Replace All**
- 1 location in the document will automatically update.

- **Note**
 - Enter “note” In the **Find** text box. (Leave the Replace text box empty)
 - Each NOTE location has unique editing needs. You will make the edits as appropriate. For example one location is for the chapter dues, another for the Chapter President’s name.
 - There are two locations for the new member’s mentor and his contact information. *Skip these for now.*
 - One of the Note locations is for chapter history.
 - ✦ If your chapter does not have a history narrative, skip this step.
 - ✦ When there is a narrative, first highlight the note description and begin typing. The paragraph will automatically adjust based on the amount of information you enter.

Step 3 > ADDING A NEW SECTION Review all of the material in your chapter section of the workbook. Make sure what is written is consistent with how your chapter operates and what programs are supported by the chapter. Modify as necessary by adding or deleting paragraphs as follows:

- Go to the page where you wish to add the new paragraph.
- Highlight the title and first couple of lines of a paragraph nearby.
- Using the **Copy** command copy this selection and **Paste** it in the location where you wish to add the new paragraph.
- Highlight the original title and change it to the new title.
- Highlight the first couple of lines and begin typing the new paragraph.
- Follow these steps and formatting is automatically applied to the new paragraph.
- Add other sections as needed.

Step 4 > REMOVING A SECTION THAT DOES NOT APPLY Remove any sections that do not apply to your chapter or are not wanted.

- These might include the reference to your chapter website, or to the history, or to the list of programs.
- To remove the section, highlight the section *including its title* and press the **delete** key on keyboard.

Step 5 > UPDATING THE TABLE OF CONTENTS Check once more for the completeness of the chapter section of the workbook. If you are okay with all the edits made, there is one final step.

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- Scroll to the beginning of the workbook, specifically to the first page of the Table of Contents.
- Left-click anywhere in the table and a small window opens at the top, left side of the table, titled “**Update Table**”.
- Click on this small window and then click on the button next to “**Update the entire table**”.
- Click on **OK**. The table now reflects all the edits you have made.
- The last step is to **SAVE** the *Orientation Workbook Template*.

You should review the *Orientation Workbook Template* one last time. If it is okay, your workbook is ready for new members. See Step 6 to personalize it for him.

Step 6 > Each time a new member joins, open the *Orientation Workbook Template* you just created and make these few changes. Use **Find and Replace** for:

- **New Member**
 - Enter “Insert New Member Name” In the **Find** text box.
 - Enter the first and last name (with a space between) of the new member in the **Replace** window.
 - Click **Replace All**
 - Two locations in the document will automatically update.
- **Note**
 - This is where you enter the new member’s Mentor information.
 - Enter “Note” In the **Find** text box.
 - Two locations in the document will appear next to each other. Enter the name and contact information for the Mentor.
- Do a **Save As** and save the Workbook with new member’s name. For example:
Theodore Roosevelt Workbook

There will be two workbook documents in the folder. One with this new member’s name and one with the *Orientation Workbook Template* name.

If you have any questions on this process contact me:

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Find and Replace in WORD in Windows 10

1. In Word, on the menu across the top, on the right side, there is an item named **REPLACE**. Click it.
2. In the field labeled “**Find What**” type text to replace. For example, “Insert New Member Name” (without the quotes).
3. Then in the field labeled “**Replace With**” type the name of the new member. For example, “Theodore Roosevelt” (without the quotes).
4. Click on the icon that reads “**Replace All**”. All locations with “Insert New Member Name” will change to the new member’s name.

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- Repeat using the other three options.
- For the “Insert Chapter Name” option – add Chapter to the name. For example: type “Western Reserve Chapter” **NOT** “Western Reserve”.

Find and Replace in PAGES in Apple OS

Replace



specific text

1. Click in the [toolbar](#), then choose Show Find & Replace.
2. Click in the Find & Replace window, then choose Find & Replace.

You can also choose other options, such as Whole Words and Match Case, to refine your search.

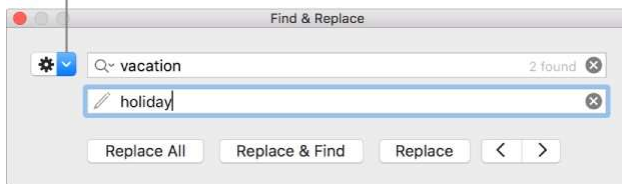
3. Enter a word or phrase in the first field. For example, “Insert New Member Name” (without the quotes).

As you enter text, matches are highlighted. The first match is selected and highlighted in yellow.

4. Enter the replacement word or phrase in the second field. For example, “Theodore Roosevelt” (without the quotes).

Important: If you leave the Replace field blank, all instances of the text are deleted when you replace the found text.

Click for more options.



5. Use the buttons at the bottom of the Find & Replace window to review and change the text matches:
 - ✦ Replace All: Replaces all text matches with the replacement text.
 - ✦ Replace & Find: Replaces the selected match and moves to the next.
 - ✦ Replace: Replaces the selected match with the replacement text but doesn't move to the next match.
 - ✦ Previous and Next arrows: Move to the previous or next match without making a change.
6. Repeat using the other three options.
7. For the “Insert Chapter Name” option – add Chapter to the name. For example: type “Western Reserve Chapter” **NOT** “Western Reserve”.