

How to Create a Vertical Toolbar with Text Buttons to Access Your Favorite Folders, Templates and Files

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The following is an elaboration of a technique published by Mike Koenecke at
<http://www.macros.koenecke.us/directories.html>.
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Here is a step-by-step guide to creating a custom toolbar with text buttons (see Figure 1) that will make it easy for you to -

(1) *access your favorite folders and subfolders* (a.k.a. directories and subdirectories), so that you can quickly get to them and open files in them; or

(2) *instantly load new, blank files based on various templates*, such as a letterhead or memo; or

(3) *open existing files*, such as a phone list, or *play a macro* with a mouse click.

You can adjust your own version of the toolbar for your particular needs, and dock it on either the left or right side of your screen.
(1)

As Figure 1 also demonstrates, you can even vertically dock other toolbars alongside the new text toolbar. (On the other hand, some users prefer to dock "utility" toolbars on the opposite side of the screen from text toolbars.)

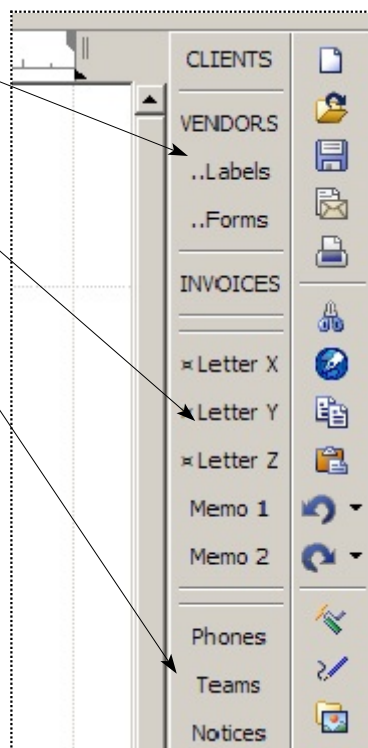


Figure 1
Folders and Files custom toolbar

Create the toolbar

Toolbars are relatively static: Unlike context-sensitive *property bars* that change according to the task (e.g., changing from editing body text to editing a header or table), *toolbars* remain visible during your WordPerfect

(1) You can, of course, dock the toolbar at the top or bottom of the screen, but text buttons might be more easily scanned visually if all buttons are in a top-to-bottom orientation.

session.⁽²⁾ You can create as many custom toolbars as you need, and you can store them in your default template or other template⁽³⁾; moreover, you can move or copy existing buttons to the new toolbar.⁽⁴⁾

The remainder of this paper will describe how to create a new custom toolbar and add **text buttons** to it that will give you easy access to folders, new documents based on other templates, and even individual existing files.

1. **First:** If you want to store the new vertical toolbar in the default template — the typical case, assuming you want it available in all new blank documents — open a new, blank document with **File, New**. Otherwise, open a new document based on the custom template where you want the toolbar stored (with **File, New from Project**); in this case the toolbar will be available only in documents based on that particular template.

Then:

2. Click on **Tools, Settings, Customize**. (*Shortcut: Right-click on an existing toolbar, and choose **Settings** from the pop-up context menu.*)
3. The **Customize Settings** dialog appears. With the **Toolbars** tab at the top selected, click **Create**.
4. In the **Create Toolbar** dialog that appears, give the toolbar a name (e.g., “*Folders and Files*”), and click the **Location...** button.

⁽²⁾ Unless, of course, you hide them from view with View, Toolbars. You can display them again with View, Toolbars. Alternatively you can simply right-click any displayed toolbar and choose the name of another toolbar to display.

⁽³⁾ To create a custom toolbar that *automatically* displays only in documents based on a *custom template* rather than the default template, you will need to open the custom template for editing and install a small template macro in it containing the macro command *ButtonBarSelect()*. The macro would then be played by the Post New trigger. Without this template macro, the new toolbar is only viewable by right clicking the toolbar area and selecting it. (See the author's *Automating WordPerfect Templates* for more information about automating templates.)

⁽⁴⁾ You can move or copy an existing button from one toolbar to another (assuming both are visible). To *move* it, hold down the <Alt> key while you drag the button to the other toolbar. To *copy* it, hold down the <Ctrl> and <Alt> keys while you drag it. Most people probably will want to copy the button, not move it, so that the source toolbar remains the same.

5. The **Toolbar Location** dialog appears. Typically, you can just click **OK** unless you want to save the toolbar elsewhere. *To elaborate:*
 - a. If you are working in a new document based on the *default* template, you can click either **OK** or **Cancel**, since the Current template and Default template choices in this dialog should point to the same template file (.WPT).
 - b. If you are working in a new document based on a *custom* template, the Current template and Default template should be different files. If the first choice is enabled (the default), it points to the custom template, and you can simply click **OK** to store the toolbar in that custom template. If, however, you change your mind and want to store the new toolbar in the default template, you can do so here by enabling the second choice, then clicking **OK**. (N.B.: To *display* the new toolbar *automatically* in a custom template, see footnote [3](#).)
6. A full-width, empty toolbar will appear in the toolbar area, and the **Toolbar Editor** dialog will also appear. Click **OK** in the **Toolbar Editor** to close it. (You'll re-open it later.)
7. The **Customize Settings** dialog reappears. *The new toolbar should be enabled with the checkbox to the left of its name.* Click the **Options** button.
8. The **Toolbar Options** dialog appears. Click the three radio buttons for **Text**, the **Right** (or **Left**) location, and **Normal** font size.

This dialog will create *text* buttons (rather than icon buttons), place the toolbar on the right (or left) side of the main document window, and use a normal size font for the button labels. You can experiment with Small font size for the button labels, but Normal size might work better on high resolution monitors.
9. Click **OK**, then **Close**, to return to the main document window.

Populate the toolbar with text buttons

At this point you have created the toolbar but it does not have any buttons. The next steps will add up to three button types to the toolbar.

Buttons to access your preferred Windows folders

These steps show how to drag shortcuts to your preferred or “working” Windows folders to the new toolbar, turning them into clickable text buttons.

1. WordPerfect should not be maximized (i.e., it should not be full-screen size). *Resize the WordPerfect window so you can see about half*

of the underlying Windows desktop. Once you have done that, make sure the **Toolbar Editor** is open on screen: You can *right-click* on the new toolbar and choose Edit to open the Toolbar Editor. When it opens, the name of the new toolbar should appear at the top of the dialog. (You can also drag this dialog out of the way.)

2. Next, open **Windows Explorer** or **File Explorer** ⁽⁵⁾, resize it on your screen by dragging the edges of its window, and then relocate it (drag it) so that you can see *both* your file folders in Windows (or File) Explorer *and* see your new WordPerfect toolbar at the same time.
3. To place shortcuts to your folders your new toolbar, simply place your cursor on a folder name In Windows (or File) Explorer and *drag* it to the toolbar in the WordPerfect window. ⁽⁶⁾ A text label (which is actually a Windows shortcut) should appear on the toolbar.
4. Double-click on the toolbar button to edit it. *Tip:* Keep labels short or (in some WordPerfect versions) the vertical toolbar might become too wide for practical use. ⁽⁷⁾
5. When you are finished, return to the main document window.

Tip: Later, when your toolbar is set up and you click a toolbar button to open a folder, you can either double-click on a file in that folder to open it, or just drag the file into the WordPerfect document window. (If you use your *right* mouse button to drag a file into the WordPerfect document window, you are given some options such as insert it, append it, insert it as a subdocument, etc.)

⁽⁵⁾ For this procedure — adding folders to the toolbar — you can use *Windows Explorer*, available in Windows 7 and earlier versions (click your desktop's Start button, then choose Programs, Accessories, Windows Explorer) or use *File Explorer* in Windows 8 and later versions (press <WinKey+E>) to drag your preferred folders to the toolbar. If you have another Windows file manager program, you can use it instead.

⁽⁶⁾ Press and hold your left mouse button, then drag the item to the toolbar; release the mouse button to drop it there.

⁽⁷⁾ When you create text buttons, the text labels on the buttons are center-justified by WordPerfect. There is no alternative to this text justification for text labels.

Buttons to open new documents based on custom templates

The standard method of loading a new document based on a custom *template* or *Project* (often, this is an *automated* template) — such as letterheads, memos, and faxes — is to use **File, New from Project** (or **File, New** in WordPerfect 8), then select the category and the name of the Project, then click **Create**.

However, the method explained here results in an easier and faster way⁽⁸⁾ to find and open documents, especially if you frequently use the same types of custom, template-based documents. You only need to click a toolbar button and the new document loads.

The following (WordPerfect 9 and later) procedure creates a very simple “loader” macro that can then played from a toolbar button with a mouse click.⁽⁹⁾ The macro selects the template and loads a new document based on that template in the main document window.

1. Open a blank document with **File, New**.
2. Click **Tools, Macro, Record**. Give the macro a name (e.g., *Letterhead.wcm*), then click **Record**. The **Macro Property Bar** appears just above the main document area.
3. Now you need to choose the template the macro will use: Click **File, New from Project**. Select the template or Project you want to use, then click the **Create** button. The document will load on screen. (If a **Template Information** dialog appears, you would normally fill in its fields; but for the procedure here, click **Cancel** to remove it from the screen. At this point you only want to load

⁽⁸⁾ See the author's *Automating WordPerfect Templates* at <http://wptoolbox.com/tips.html#autoWPT>, from which the particular method explained here was taken. Other methods — e.g., create a desktop shortcut to “point” to the template file (.WPT) — have certain drawbacks, as explained in that article.

⁽⁹⁾ Note that if you a lot of commonly used templates — such as letters, envelopes, memos, notices, and invoice forms — it might be more practical to create a new drop-down menu on the top menu bar and populate it with items that play the various macros. See <http://wptoolbox.com/tips/NewMenu.html>.

IMPORTANT: In some versions of WordPerfect (e.g., version 8) this method of recording a loader macro might not work to produce a macro. If that happens — or you simply want a faster method of creating such macros — you can write a simple one-line macro containing the *TemplateSelect()* command. Be sure to use the full drive\path\<template name>, and enclose everything in double quotes. For example:

```
TemplateSelect (“C:\Documents and Settings\Administrator\Templates\My Letterhead.wpt”)
```

a new document based on the template and not do anything else that might get recorded.)

4. Stop the macro recording by clicking the far left button (■) on the **Macro Property Bar** (its Tool Tip says “Stop macro play or record”) or just use **Tools, Macro, Record** once again.
5. Close the document on screen with **File, Close** (i.e., don’t save it or any changes to it).
6. Test the macro with **Tools, Macro, Play**. The macro should immediately load the document in the usual manner.
7. . . . *Repeat steps 1 through 6* to create a differently named macro for each template that you want to access this way.
8. Right-click anywhere on the new text toolbar, then click **Edit**. The **Toolbar Editor** appears.
9. Click the **Macros** tab, then click the **Add Macro** button. From the **Select Macro** window, choose the loader macro(s) you created above, then click **Select**. Usually, you can answer the “Save macro with full path?” question with “No” since WordPerfect will automatically look for the macro in one of the two folders specified in Tools, Environment, Files, Merge/Macro.
10. A new button appears on your toolbar. While the **Toolbar Editor** is still on screen, double-click the new button (or right-click it and choose **Customize**) to bring up the **Customize Button** dialog. Give the button a name in the **Button Text** field and a **Quick tip** to display when you pass your mouse over it. Note that whenever the **Toolbar Editor** is on screen you can move a button by dragging it, or delete it by dragging it from the toolbar.
11. . . . *Repeat steps 8 - 10* for all loader macros.
12. Click **OK** all the way back to the document window.

Buttons to open existing WordPerfect files or play macros

(i.e., those previously saved to disk)

Follow the same procedure in *Buttons to access your preferred Windows folders* on page [3](#) above. Instead of dragging folders to the toolbar you drag individual *file names*. (*Tip*: Group them together and separate them from other button types with Separators.)

Undocking and re-docking the toolbar

You'll notice that if you pass your cursor over an empty area of a toolbar, it changes to a four-headed arrow. If you then hold down the left mouse button you can drag the entire toolbar to the top, side, or bottom location, or even to the desktop to let it "float" as a separate Palette. You can drag it back into place, or right-click on it and choose **Settings, Options** to specify the location.

You can dock another toolbar (or more than one) adjacent to the new toolbar, if that proves beneficial.

Tips

1. You can use various techniques to provide visual cues to what the buttons will do. For example (and as shown in Figure 1) you can -
 - use capital letters for folder (directory) names;
 - use leading characters, such as several dots (...) or hyphens for *subfolder* (*subdirectory*) names;
 - use dividers, which are labeled as "Separator" on the **Toolbar Editor**, and which can be dragged to the toolbar between buttons to help organize them;
 - use special characters before or after a text label: when editing the label name, pressing **<Ctrl+W>** will let you insert a few special characters, such as a dot (•) or an x-circle (⌘); these might signal you that it's a macro, or to use a special printer or paper, or whether to make a file copy, etc.
2. It is a good idea to make a back up copy of the template before customizing it, and again after creating or revising your new toolbar. For more on the default and custom templates, how to find them, how to edit and modify them, etc., see <http://wptoolbox.com/tips/Templates.html>.
3. If you have created the new toolbar in a document based on the *default template* (in contrast to a custom template), the new toolbar will be saved as part of the default template. However, it can be copied to other *custom templates* using the **Copy/Remove...** button on the *target* template's Template Property Bar. (Both the source template — here,

your default template — and the target template must be in the same folder. The source template can be a simple copy of the original template for this purpose.)

4. (*Related tip to previous:*) You can have a *custom toolbar* appear whenever you load a new document based on a *custom template* (e.g., a letterhead or invoice template). You will need to create the toolbar inside the custom template (or copy it there) and then create a small template macro that is triggered by the Post New trigger. (This and other aspects of automating templates can be found in the author's PDF article *Automating WordPerfect Templates*, downloadable from his website at <http://wptoolbox.com/tips.html#2>.) The macro would consist of these two ButtonBar commands (where “My Toolbar” is replaced by the actual custom toolbar name):

```
ButtonBarSelect(ButtonBarName:"My Toolbar";  
LoadedFromDefaultTemplate:No!)
```

```
ButtonBarShow(State:On!; ButtonBarName:"My Toolbar";  
LoadedFromDefaultTemplate:No!)
```

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