

Adding Menu Selections to the WordPerfect® Menu Bar

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[Http://wptoolbox.com](http://wptoolbox.com)

[**Alternative:** To create a vertical toolbar with descriptive text buttons to access your favorite *folders, templates, and files* see <http://wptoolbox.com/library/VerticalToolbar.pdf>.]

Suppose you have created one or more customized letterhead, envelope, memo, invoice, or fax cover sheet *templates* with **FILE, NEW FROM PROJECT** (or just **NEW** in WordPerfect 8). Having done so, when you need a new document based on one of these templates you typically need to “drill down” under that menu selection to get to the template so that you can load a new document.

Of course, if you use the same template folder (“Category”) for all your customized templates, or you can easily remember where to find a particular template, this should take only a few mouse clicks. Otherwise, you may have to hunt around a bit to find what you need. This is not a good use of your valuable time.

You may find it faster and more convenient to load all of these new documents from a top-level menu. In fact, related forms (e.g., letterheads and envelopes, or memos and fax forms) might be better organized and more quickly accessed from a drop down menu selection — perhaps labeled “Stationery,” “Letterheads,” or “Forms” such as shown in the following sample:



Sample menu items you can create

To do this, follow the simple steps below.

First, Create the “Loader” Macros

You'll first need to create several short and simple “loader” macros, each of which loads a document based on the particular template you want to use. Then you'll create a new menu *selection* for the top menu bar, usually to the right side of other menu selections (e.g., the “Help” menu selection). Finally, you'll assign these loader macros to the new menu selection as menu *items* (i.e., choices under the menu selection). When you're done, you'll need only two mouse clicks to bring up a blank letterhead, memo, or other customized form. ¹

1. Open a blank document with **FILE, NEW**.
2. Click **TOOLS, MACRO, RECORD**. Give the new macro a name (e.g., *Load my letterhead*) in the Record Macro dialog window, then click the Record button at the bottom of that dialog. The Macro toolbar appears just above the document area; you'll use it to stop recording (Step 5 below).
3. Click **FILE, NEW FROM PROJECT** in WordPerfect 9 and later (or just **FILE, NEW** in WordPerfect 8).
4. Select the custom template or WordPerfect Project you want to use, then click the **CREATE** button. The new document will load. (If a *Template Information* dialog appears, click **CANCEL** to remove it.)
5. Stop the macro recording by clicking the far left button on the Macro Property Bar (its Tool Tip says “Stop macro play or record”). 
6. Close the document on screen with **FILE, CLOSE** (i.e, don't save it).
7. Test the macro with **TOOLS, MACRO, PLAY**. The macro should immediately load the document in the usual manner.

¹ **Tip:** If you need to insert lots of different blocks of *boilerplate text* into the current document, try this: Rather than use WordPerfect's QuickWords feature or the Keystrokes tab in the Menu Editor (see next page), you could create a new folder on your disk (perhaps named “C:\Boilerplate”) and store individual WordPerfect files in it that contain individual boilerplate items (e.g., “Opening paragraphs.wpd,” “Closing.wpd,” etc.). These WPD files can be easily found later and edited as needed. You can then access them by recording macros in a similar manner to the “loader” macros described here. However, instead of **FILE, NEW FROM PROJECT** in Step 3, you would use **INSERT, FILE** to choose and insert these boilerplate files with a mouse click. (Skip Step 4.) Then assign the macros to a menu selection (or sub-menu selection) as described in this paper. Each menu item would then insert the chosen file at the current cursor location. [See also the [alternative](#) at the top of this paper.]

- Repeat the previous steps to create a differently named macro for each template that you want to access this way.

Next, Create a New Menu Selection

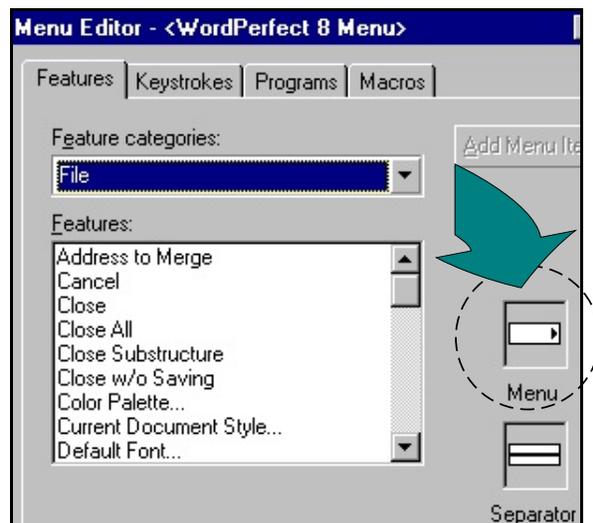
This section describes how to create a new drop down menu selection on the top menu bar. In the next section you will add one or more choices (menu items) for your letterhead, envelope, fax forms, etc.

- Right-click* on the top menu bar (the one with **FILE, EDIT, VIEW,** etc.), then from the context menu that appears, click on **SETTINGS....**

- In the Customize Settings window that pops up, click on the menu you want to customize under the **Menus** tab. Generally this is the **<WORDPERFECT N MENU>** (where "N" is your version number), unless you have previously created a customized menu — in which case, click on that one. Then click **EDIT** to bring up the Menu Editor.



- In the Menu Editor window you'll see an indented box on the right side labeled **Menu**, just above the box labeled **Separator**. Hold down your left mouse button and *drag* the **Menu** icon from this box (a small white rectangle with a right arrowhead inside it) up and to the right side of WordPerfect's top menu bar — the empty area adjacent to the other menu selections. Release the mouse button to drop the icon onto the menu bar.



4. Move your cursor over this new menu selection (which is temporarily labeled "Menu" by default), and when it turns dark blue (assuming you use default Windows' colors), *double click it*. This will allow you to change the name in the Menu Item field to "Letterheads," "Stationery," or something more useful, and add a floating description (Quick Tip). If you prefer using the keyboard to the mouse to access this menu later, you can type an ampersand (&) immediately before any letter in the name that you want to use as a mnemonic; this will select the menu if you use the keyboard's [Alt+<letter>] key combination. Click **OK** when you are done editing the menu name and Quick Tip.



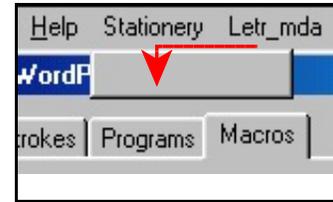
Finally, Add Choices (Menu Items) to the New Menu

1. While the Menu Editor window is still open, click on the **MACROS** tab at the top, and then click the **ADD MACROS** button. Select the macro that you previously created in the first section above that loads your chosen template. Click **SELECT** to close the Select Macro window. A dialog will pop up and ask if you want to save the macro with its full path; answer either 'Yes' or 'No'. [Choosing 'No' will tell WordPerfect to use the Default macros folder shown in **TOOLS, SETTINGS, FILES, MERGE/MACRO** when playing the macro, and may be the preferred answer for most users; **Yes** will point to the exact location of the macro on your system.]

[Note to WordPerfect 8 users: When you get back to the Menu Editor you may have to click in a blank area of the Menu Editor window to make the window active again. This is not required in WordPerfect 9 and later versions.]

You'll now notice the macro's filename (without an extension) was placed on the top menu, just to the right of your new menu selection. You'll want to move it underneath the new menu selection to make it a menu *item* (i.e., a menu choice). You'll also want to change its name. Here's how:

- Carefully place your cursor over the macro's name on the top menu bar until it turns reverse color (i.e., it's now "selected"), then hold down the left mouse button and *drag* the name over to the new menu — then drag it down to the empty (gray) area that pops up just under the new menu's description; drop it there. This is a *first go left, then go down* drag operation with your mouse.



[In the example figure shown above, "Letr_mda" is a sample filename, which would be dragged left and down to the empty box; it will then appear as an item on the Stationery menu's drop down list of choices (in this example).]

For additional menu items you can drag-and-drop the macro name either below or above any existing menu items. A heavy horizontal line will appear to guide your placement.

You also can add a separator line between menu items by dragging and dropping a separator from the Menu Editor window.

- Rename the menu item by carefully positioning your mouse over it. When the macro's name turns reverse color, *double click it* and rename it in the pop up box. In the same way that you can add an Alt-key mnemonic to the menu selection, you can type an ampersand (&) immediately before any letter in the menu item's name. Click **OK** to exit the dialog box.
- Click **OK** when you are done to close the Menu Editor, then click **CLOSE** in the Customize Settings window.

Removing menu items

If you later decide to delete the new menu selection or one of its menu items, simply bring up the Menu Editor window and either drag the entire menu selection from the top menu bar, or just a single item from the menu.

Since menus (and toolbars) are stored in the default template (or the custom template currently in use), you might want to make a renamed backup *copy* of your customized menu in case you want to restore things later. You can do this from the Customized Settings dialog. ■