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# Microsoft Office Word 2007

## Using Templates/ Designing Forms

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*A template is a file that contains page and paragraph formatting with text that you can customize to create a new document similar to the original.*

## TEMPLATES

### Using an Existing Template

#### 1. To open an existing Word template,

- Click the Microsoft Office Button 
- Click New. The New Document window opens.

#### 2. To open a template and use as a document,

- Select the appropriate type in the left column and double-click the template icon you desire. (You may have to confirm download if you choose from Microsoft Online) Word opens a new document (notice name in Title bar) with the settings and text specified by the template already in place.
- Replace the data in the template with your own data and save.

#### 3. To open a template and modify it,

- click to select template name
- click the 'Template' button
- click 'Create'


**Note:** *After modifying the template, save it with a new name.*

### Creating a New Template

#### 1. To create a template using a new, blank document


- Click the Microsoft Office Button
- Click New
- High Light "Blank Document"
- Click "Create"
- Design Your Template the way you want it.
- Click the Microsoft Office Button
- Place your cursor over "Save As"
- Choose "Word Template" in the list that appears.
- Make sure you save templates in "Trusted Templates" folder. This will allow the Microsoft security features to open the document.

#### 2. To create a template from an existing document,


- Open the document
- Click the Microsoft Office Button 
- Place your cursor over "Save As"
- Choose "Word Template" in the list that appears.
- Make sure you save templates in "Trusted Templates" folder. This will allow the Microsoft security features to open the document.

## Creating a Document Using Your Template

1. To use a template you created,

- Click the Microsoft Office Button 
- Click New
- Select “My Templates” in the left column
- Click on the Template and press “OK”.

2. After you make changes to this document


- Click the Microsoft Office Button 
- Save As; name the document and save it.

**NOTE:** Word 2007 saves regular files with a **.docx** extension and saves template files with a **.dotx** extension.



## FORMS

### Create a form

1. Set up Word for creating forms:

- Click the Microsoft Office Button  then click Word Options.
- Click Popular.
- Select the Show Developer tab in the Ribbon check box, and then click OK.

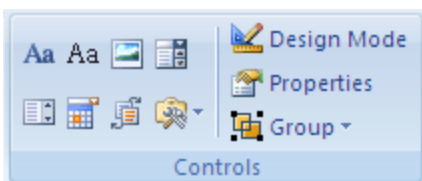
2. Open a template or a document on which to base the form:

- Click the Microsoft Office Button  then click New.
- Under Templates, click My templates.
- Double-click Blank Document, and then click Template or Document under Create New.
- Click the Microsoft Office Button  then click Save As.
- In the Save As dialog box, give the new template or document a file name, and then click Save.

3. Add content controls to the form:

Design the form by sketching a layout first, or use an existing form as a guide. In your form, you can add content controls, tables, and other graphics elements.

On the Developer tab, in the Controls group, click Design Mode, and then click where you want to insert a control.



Do any of the following:

Insert a text control where users can enter text


- On the Developer tab, in the Controls group, click the Rich Text control  or the Text control .

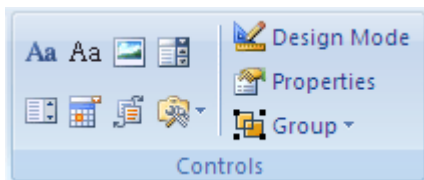
## Insert a text fill-in field

**IMPORTANT** *Spell Check will not flag any errors that are typed in the text form field. If you want to run Spell Check, use the Rich Text control or the Text control.*

- On the Developer tab, in the Controls group, click Legacy Tools.
- Click Text Form Field.
- In the Controls group, click Design Mode, and then do any of the following:
  - To add a line under the field, select the field, and then click Underline in the Font group on the Home tab.
  - To limit the amount of information a person can type in the field, set a maximum width by selecting the field, clicking Properties in the Controls group, and entering a value under Maximum length.
  - To make the field look as long as its maximum length, add instructional text by clicking Properties in the Controls group, and typing text, such as Type your first name here, under Default text.

## Insert a drop-down list that restricts available choices to those you specify

- On the Developer tab, in the Controls group, click the Drop-Down List control .
- Select the content control, and then on the Developer tab, in the Controls group, click Properties.



- To create a list of choices, under Drop-Down List Properties, click Add.
  - Type a choice in the Display Name box, such as Yes, No, or Maybe.
- Repeat this step until all of the choices are in the drop-down list.

## Insert a check box

- On the Developer tab, in the Controls group, click Legacy Tools.
- Click Check Box Form Field.
- Type a space, and then type a label for the check box.
- To remove the shading from the check box, click Legacy Tools, and then click Shading.

**Note:** *You won't be able to select or clear the check box until you protect the form.*

## 4. Set or change properties for content controls:

Each content control has properties that you can set or change. For example, the Date Picker control offers options for the format you want to use to display the date.

- Right-click the content control that you want to change.
- Click Properties, and change the properties that you want.

## 5. Add instructional text to the form:

Instructional text can enhance the usability of the form you create and distribute. You can change the default instructional text in content controls.

To customize the default instructional text for your form users, do the following:

- On the Developer tab, in the Controls group, click Design Mode.
- Click the content control where you want to revise the placeholder instructional text.
- Edit the placeholder text and format it any way you want.
- If you want the content control to disappear when someone types in their own content to replace your instructions in a Rich Text control or a Text control, click Properties in the Controls group, and then select the Remove content control when contents are edited check box.
- On the Developer tab, in the Controls group, click Design Mode to turn off the design feature and save the instructional text.

## Add protection to a form and prepare it for distribution

You can protect individual content controls in a form template to help prevent someone from deleting or editing a particular content control or group of controls, or you can prepare a form to be distributed and filled out by locking it. You can help protect all of the form template content with a password.

### 1. Protect parts of a form

- Open the form that you want to protect.
- Select the content control or the group of controls to which you want to restrict changes.  
To group several controls, select the controls by pressing SHIFT and clicking each control that you want to group. On the Developer tab, in the Controls group, click Group, and then click Group.
- On the Developer tab, in the Controls group, click Properties.
- In the Content Control Properties dialog box, under Locking, do either of the following:
- Select the Content control cannot be deleted check box, which allows the content of the control to be edited but the control itself cannot be deleted from the template or a document that is based on the template
- Select the Contents cannot be edited check box, which allows you to delete the control but does not allow you to edit the content in the control.

**Note:** *This option is not available for all controls.*

### 2. Prepare a form to be filled out

- Open the form that you want to lock so that it can be filled out.
- On the Developer tab, in the Protect group, click Protect Document, and then click Restrict Formatting and Editing.
- In the Protect Document task pane, under Editing restrictions, select the Allow only this type of editing in the document check box.
- In the list of editing restrictions, select Filling in forms.
- Under Start enforcement, click Yes, Start Enforcing Protection.
- To assign a password to the document so that only reviewers who know the password can remove the protection, type a password in the Enter new password (optional) box, and then confirm the password.

**IMPORTANT** If you choose not to use a password, anyone can change your editing restrictions.

It is critical that you remember your password. If you forget your password, Microsoft cannot retrieve it. Store the passwords that you write down in a secure place away from the information that they help protect.