

Making Forms and Templates with Word

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Creating a Template

From Scratch, New Document

1. On the Menu Bar, **click** on **File**, select **New**
2. On the New Dialog box at the bottom right, select **Create New Template** (notice in the title bar it usually says Document 1 but now it says Template 1)
3. Type the document the way you want it to appear.
4. When you save it notice that it automatically wants to save it as a Document Template. (You can't save it as a different file type) It also wants to save it in the Templates folder; this is so that when you click **File, New** you can open the template file. Give the file a name and leave it in the template folder.

After You Have Created a Document

1. If you have typed a document and have decided that it would be a good template, you can save the file as a document template.
2. On the Menu Bar, **click** on **File**, select **Save As**.
3. In the Save As window in the bottom left where it says Save As Type change that to say Document Template. You will notice that it automatically changes the location of where it is going to save to the Template folder. Give the file a name and leave it in the template folder.

To Run a Template

These are the instructions to run a template that has been saved in the Templates folder on the hard drive.

1. On the Menu Bar, **click** on **File**, select **New**.
2. In the list of file icons **double click** the template you want to open.
3. You will notice that on the top it will say Document 1 so that if you make changes it is not affecting your template.

To Make Changes to your Template

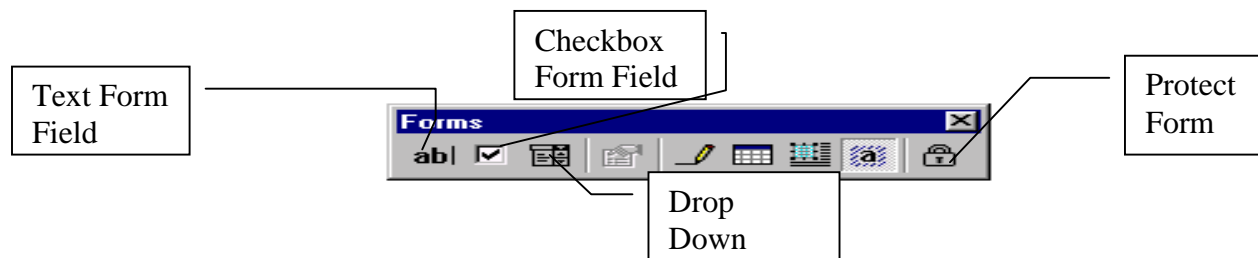
1. On the Menu Bar, **click** on **File**, select **Open**.
2. In the Open window where it says Look in navigate to the Templates folder.
 - In Word 97—(Go to the C drive, double click on the Program Files folder, double click on the Microsoft Office folder, and double click on the Templates folder.)
 - In Windows 98 and Word 2000—(Go to the C drive, Windows, Application Data, Microsoft, Templates)
 - In Windows 2000 and Word 2000—(Go to the C drive, Documents and Settings, Administrator, Application Data, Microsoft, Templates)
 - Once you get into your Administrator folder if you can't see your Application Data folder you will need to unhide folders. Follow these

directions, click on Tools in the Menu bar, slide down and select Folder Options, click on the View tab, in the View window make sure the radio button next to Show Hidden Files and Folders is selected, click OK.)

3. Also in the Open window on the bottom left where it says Files of Type, select Document Templates.
4. This will allow you to see your template files, double click on the file you want to change.
5. Notice up in the title bar it says the name of the template not Document 1 so you are actually making changes to the template file.
6. When done making changes save it.

Creating Documents/Templates with Form Fields

1. You usually want to create a Form as a template so follow the steps to create a template. (On the Menu Bar, **click on File**, select **New**. On the New Dialog box at the bottom right, select **Create New Template**.)
2. To insert form fields you must turn on the Forms toolbar. On the Menu Bar, **select View**, slide down to **Toolbars**, slide over and **select Forms**.
3. When you are ready to insert a form field, click the appropriate icon from the form field menu.



4. To add options to the drop down field **double click on the field** once you have selected it from the Forms toolbar.
5. Continue this process until you have entered all the desired fields and text for your form.
6. Before you save it you need to protect it so that people can only type in the form field area. **Select the Protect Form** icon on the Forms toolbar.
7. **Save** the document/template.

To Make changes to a Form Field Document/Template

1. Open the document/template.
2. Unprotect the file. On the Forms toolbar, **select Protect Form** icon.
3. Make changes; remember to protect the document again before you save it.