Section 4 Templates and forms

By the end of this section you will be able to:

- Understand what templates can be used for
- Create a new template
- Base documents on a saved template
- Add standard text, formatting and graphics
- Use fields to automate templates
- Customise the template with AutoText, macros and toolbars
- Create an on-line form template
- Protect a form template
- Create new documents based on a form template
- Understand what fields can be used for
- Insert fields into a document
- Update fields
- Lock fields to prevent updates
- Unlink fields from source data
- Recognise and use some common long document fields

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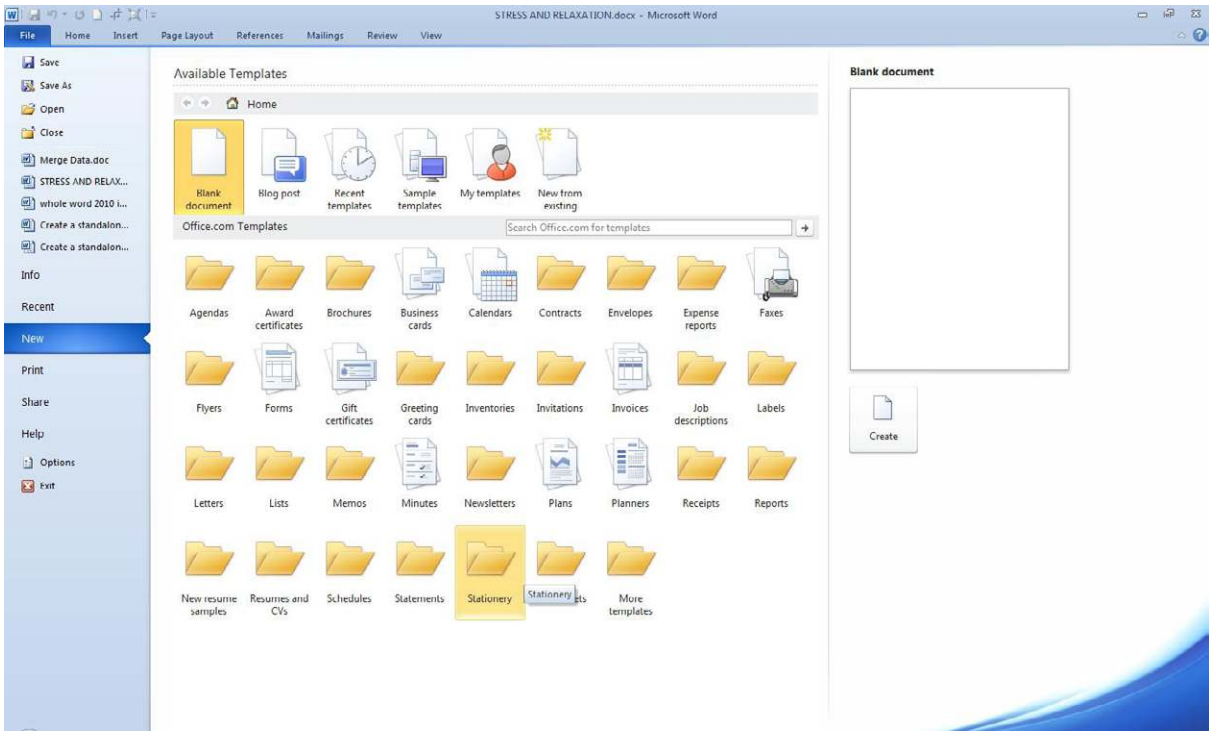
Templates

A template is a structure for a particular type of document. You can eliminate much of the work involved in creating new documents if you design templates for the documents you create most often. Templates can include text, styles, formatting, fields, macros, AutoText entries and graphics. The method of accessing templates is a little different in 2010



The new document area is split into 3 main areas

- *Local templates created by you or preinstalled ones on your local machine these can be accessed any time they are stored in your user templates folder.*
- *Office.com templates you may see a thumbnail here if you have previously been online but you must be online to download and use these templates,*
- *The preview area far right to give you a preview of what your template will look like if you create a document based on this file*

Create A Template

You can create a new template by modifying one of the templates supplied with Word, by saving an existing document in template format or by using the File Tab, New to set up a brand new template file.

▸ To create a new template:

Mouse

1. Click the **FILE** Tab then **NEW**. The **NEW** document window will be to your right.

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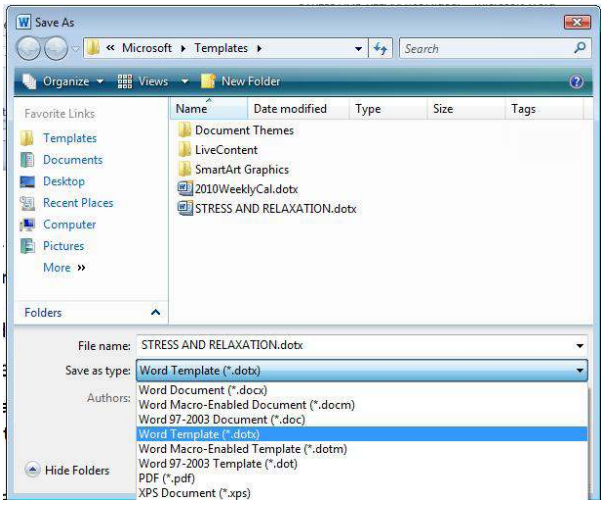
2. Choose the **BLANK DOCUMENT** icon in the main window click on **CREATE** on the right underneath the preview.
3. A new document will appear on-screen.
4. Click on the **FILE** tab and **SAVE** or **SAVE AS**
5. Give the file an appropriate name.
6. In the **SAVE AS TYPE** box select **DOCUMENT TEMPLATE** (see picture)
7. The file location should be your local user templates folder.



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8. Click on **SAVE** to save the template.

OR

1. In the **FILE - NEW** area select **MY TEMPLATES** a dialog will appear.
2. Select a previous template you wish to base your new template on (if there are none then select blank document.
3. Near the bottom right of the dialog choose **TEMPLATE** instead of **DOCUMENT** then click **OK**
4. A new document will appear on screen but it will say **TEMPLATE 1** in the title bar.
5. Save as previously instructed when you have made the changes you wish.

- *A template can be edited like any other file it must be opened like any other file to edit it in any way.* ***DO NOT*** *go to the* ***FILE - NEW*** *area to edit a template this is only to create new files* ***based*** *on a given template.*
  All template files are saved with a .dotx extension in the C:\Documents and Settings\username\Application Data\Microsoft\Templates. This location may be different if your company has specified a different location for user templates in the OPTIONS dialog. You can change the location in which to store your template, however, you may have difficulties accessing it

Template Settings

When designing a template for documents for a specific purpose, you should consider the usual appearance you want for the documents. Options that affect the appearance of a document include the following:

- ***Paper size***
- ***Page orientation***
- ***Margins***
- ***Headers and footers***
- ***Styles***
- ***Themes***

▸ To set template appearance:

Mouse

1. **OPEN** the template file for editing as mentioned previously.
2. Access the **PAGE SET-UP** dialog and set the **MARGINS**, **ORIENTATION** and **PAPER SIZE** as appropriate.
3. Create any **HEADERS** and **FOOTERS** within the template so that all new documents based on the template will have consistent headers and footers and **SAVE** the file.

Enhancing A Template

Any text or graphics that you save in the template will appear in every document based on that template. This is a way to create,

- *E.G. a standard letter for your company that includes the company logo and address.*

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To enter boilerplate text and graphics:

Mouse

1. **OPEN** the template file and Type in any standard text and format it to look the way you want.
2. **INSERT** any pictures that should appear in all documents based on the template and **SAVE** the file

Template From Existing Document

You can also start from a document you already have and save it as a Template, but the save procedure is different from normal. You

1. Select **FILE**, **SAVE AS**.
2. In the **SAVE AS** dialog box, you type the file name
3. click the **SAVE AS FILE** Type drop down option. Choose Document Template from the list and this will add the extension **.DOTX** to the file name. It will also change the destination folder into which the file will be saved. This is the special **TEMPLATES** folder.

- *It is vital you do not try to override this feature because when you select **FILE, NEW** later, Word will look to the Templates folder to present all the available templates to you.*

Customising The Template Environment

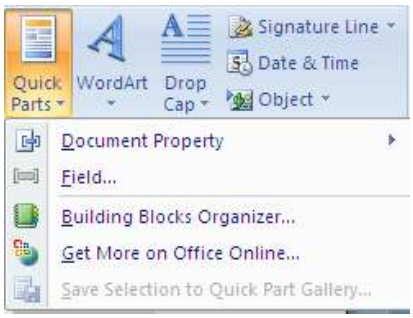
You can attach different features to a specific template.

- *E.G. you can set up field entries and charts that are template specific and you can create macros that are only available to documents based on a particular template.*

Fields

Fields are special codes that instruct Word to insert information into a document. They can be used to provide document information such as the file name, or the date when it was created. You can also use fields for simple information like page numbering and displaying the current date. Fields are also the underlying component of cross-references, tables of contents and indexes.

Inserting Fields



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- To insert a field into a document:
  1. Mouse
  2. Position the insertion point where you want to add the field
  3. Choose **QUICK PARTS** from the **INSERT** ribbon in the **TEXT** group.
  4. Choose field from the menu a dialog opens.
  5. The **FIELD** dialog displays a list of **CATEGORIES:**, and when you click on one of these, the **FIELD NAMES**: in that category are displayed below. At this point you can select the required field (the description tells you what the field will display)
  6. Click on the options button on the bottom left of the dialog to access the switches dialog.

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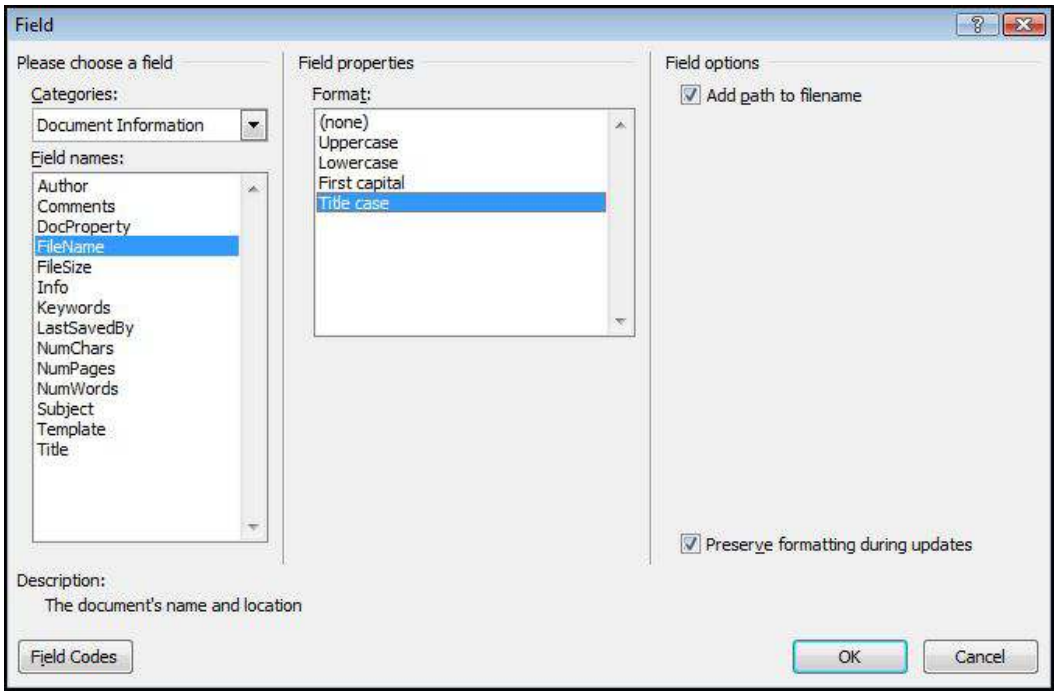
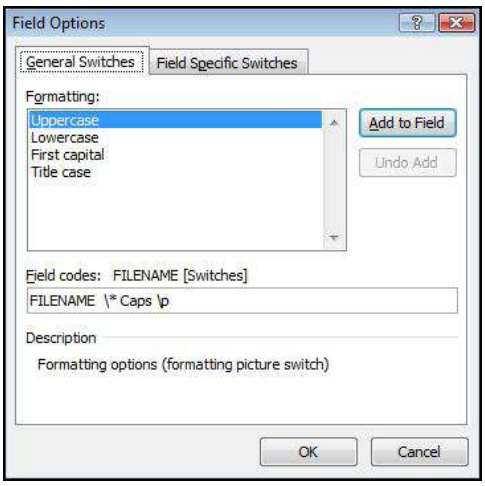


Field Switches (Field Properties)

Some fields have further options called "switches", E.G. the Filename field has an extra switch, which enables you to display the filename with its full path.



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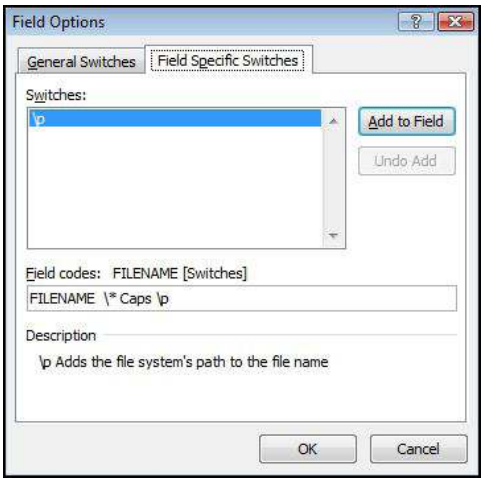

To add a switch:

Mouse

1. There are two tabs in the **FIELD OPTIONS** dialog one tab as shown above for **GENERAL SWITCHES** you can see the options in the first dialog, make a selection.
2. Clicking on the **FIELD SPECIFIC SWITCHES** tab (if available) will allow some alternatives to add to your field very specific to the field you are using. Make a selection and click **OK** to apply those switches to your field
3. Click on **OK** on the main **FIELD** dialog to insert your field with all its switches

Inserting The Styleref Field

There are various reference fields, which are largely irrelevant, since there is a separate cross-referencing feature in word. However one field, which is useful, is {StyleRef}. It is often used to place the current Chapter Title in the Header or Footer area. {StyleRef} - inserts the text of the next or most recent paragraph using the specified style. This training manual displays the Heading 1 text in the Header. The text changes only when a new Heading 1 paragraph is on the current page. If there isn't one, it continues to use the last Heading 1 text.

To insert the StyleRef field:

Mouse

1. Choose **QUICK PARTS** from the **INSERT** ribbon in the **TEXT** group. Click on **FIELD** A dialog opens.
2. Select the **LINKS AND REFERENCES** category, then select **STYLEREF**
3. Specify the style name you wish to use from the field properties and click on **OK**
   {STYLEREF "Heading 1"}

4. Right click on the field and then choose **EDIT FIELD** the dialog opens link the field to another style, E.G.:
   {STYLEREF "Heading 2"}

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5. Then press **F9** to update the field.

Updating Fields

Most fields do not update automatically. In these cases you would need to update the fields.

- ***E.G.** if you enter the **DATE FIELD** (displays the current date), every time you open the document in future, the old date is still displayed. Or, if you have entered the Filename field in a document, and subsequently change the name of the file, the document will still display the old filename.*

▸ To update a field:

Mouse

1. Right click on a field and choose **UPDATE FIELD**.

Keyboard

1. Click in or select the field and Press **F9**
   Alternatively, you can make Word automatically update all the fields when you print the document.

▸ To set automatic field updating when printing:

Mouse

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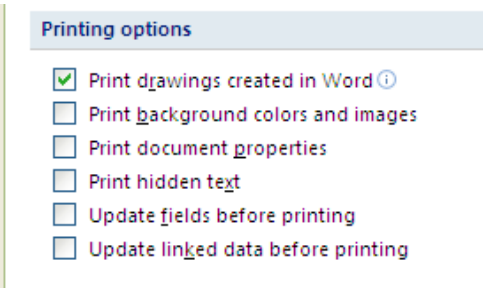


1. Click the **FILE TAB** and select **ADAVNCED**
2. Scroll down on the right to the printing options
3. Select the **UPDATE FIELDS BEFORE PRINTING** check box

Viewing Field Codes

When you have inserted a field, the results will be displayed in your document.

- *E.G. a field code to display the path and name of the current document might show up like this:* **C:\MY DOCUMENTS\WORD2002 ADVANCED MANUAL.DOC**

  You may need to see the underlying code.

Display All Field Codes

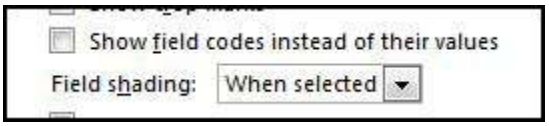
▸ To display all the field codes in the document:

Keyboard

1. Press**ALT F9**

OR

1. Click the **FILE TAB** and select **OPTIONS**.
2. Click on the **ADVANCED** tab and scroll on the right to **SHOW DOCUMENT CONTENT**.
3. Click on the **SHOW FIELD CODES INSTEAD OF THEIR VALUES** check-box.



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4. You also have the option how those field codes are displayed just underneath that option you may select from the drop down box whether to show the fields shaded or not so as to easily identify them.
   Whatever choices you make these are selections for the screen only the fields will print the actual vales as described. Print preview will show exactly how the data will appear. To toggle back to display all field results, repeat the procedure above.

Display A Single Field Code

- To display the underlying field code:

Mouse

1. Click the right mouse button when pointing at the field from the shortcut menu click on **TOGGLE FIELD CODES**

Or

Keyboard

1. Click in or select the resulting the text, and press **SHIFT F9**

The field code is always displayed inside a set of brackets. The name of the field is displayed along with any switches.

{FILENAME \p * MERGEFORMAT}

Pressing** SHIFT F9 **(or using the menu) is a toggle, in other words every time you press it, and Word either displays the field result or the field code.

Locking A Field

It is possible to lock a field so that the results displayed cannot be updated by either pressing **F9**, or by using the turning off the **UPDATE FIELDS BEFORE PRINTING** option in the **PRINTING** Options.

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To lock/unlock a field:

Keyboard

1. To lock - Click in or select the field. Press **CTRL F11**.
2. To unlock - Click in or select the field Press **CTRL SHIFT F11**

Unlinking Fields

You can also unlink a field. The field result is converted into literal text, which means it is no longer, a field and so cannot be updated.

To unlink a field:

Keyboard

1. Click in or select the field Press **CTRL SHIFT F9**

Deleting Fields

If you have entered a field which you no longer want to keep, you must select the whole field before pressing **DELETE** or **BACKSPACE**.

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Common Long Document Fields

There are many different types of fields, some of which are used for specific tasks. The following fields are some of the more common used in Long Documents. Whilst these fields can be placed anywhere in a document, they are often displayed in the Header and Footer area.

Date And Time

Field Name	Description
Date	The current date
Time	The current time
Create Date	The date when the document was created
Print Date	The date when the document was last printed
Save Date	The date when the document was last saved

When you insert these fields, you can click on the **OPTIONS** button in the Field dialog to change the formatting of the dates and times.

Document Information

Field Name	Description
Title	The Title from the Summary Information
Subject	The Subject from the Summary Information
Author	The Author from the Summary Information
LastSavedBy	The name of the person who last saved the file
Filename	The name of the document, with an option to display the full path
Template	The name of the document's template, and an option to display the path
NumPages	The total number of pages in the document

Numbering

Field Name	Description
Page	The current page number
Section	The current section number
Section Pages	The total number of pages in the current section
RevNum	The number of times the document has been saved

The Page and The Section fields can be combined to produce composite page numbers. E.G. the second page in the fifth section could be displayed like this: 5-2.

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Using Fields In A Template

Word fields may also be part of a template. There are nine categories of Word fields and they provide the means to insert information or perform an action automatically.

- *E.G. the Date field inserts the computer system's current date in a document. Other Word fields can insert page or section numbers, enter the author's name, or insert correct page references to another page in the document.*

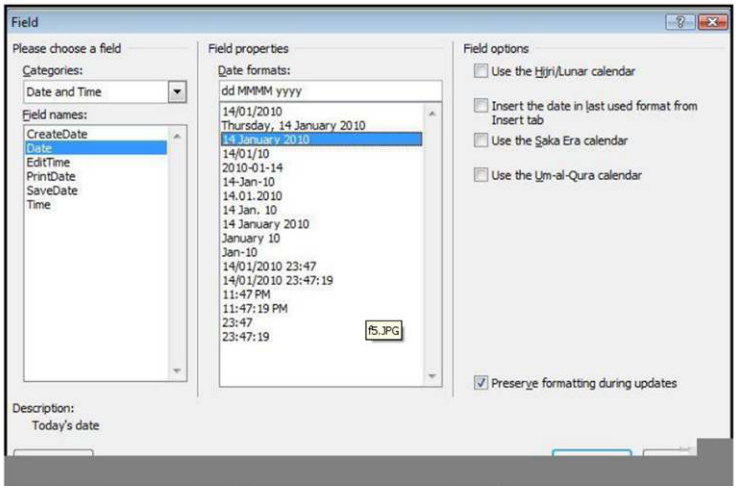
When you insert the date or time, you can check Update Automatically. When this is checked, Word will automatically update the field to the current date or time when the document is printed. If you want the current date to be inserted in the document and to remain as that date, do not check Update Automatically.

In order to view the field inserted in a document or template, you must check the **SHOW FIELD SHADING WHEN SELECTED OPTION** in the **ADVANCED** tab, **DISPLAY** section of the **WORD OPTIONS** dialog box accessed from the **FILE TAB**.

To insert a date field in a template:

Mouse

1. **OPEN** the template file
2. Position the insertion point where you want the date to appear.
3. Go to the **QUICKPARTS** button on the **INSERT** ribbon and select **FIELD**.



4. Insert the **DATE** field from the **FIELD** dialog
5. Choose the format you would like for your date by clicking on the appropriate date in the list of field properties .
6. Click **OK**. The date will appear in the template.

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The Fillin Field

The Fillin field allows you to pop-up a custom dialog box that prompts the user of the document to enter text. You enter the message that you want displayed in the dialog box. E.G. you might use a Fillin field in a memo template to prompt the author for the memo subject.

To insert fields to provide user prompts:

Mouse

1. Open the template file.
2. Position the cursor where you want the variable information.
3. Go to the **QUICKPARTS** button on the **INSERT** ribbon and select **FIELD**. The field dialog box will appear.
4. In the **CATEGORIES** list choose **MAIL MERGE**.
5. In the **FIELD NAMES** list choose **FILL-IN**. Click in the **FIELD PROPERTIES** text box and type your prompt, such as Please enter the memo subject.
6. If you expect many entries the same such as "country of origin" "UK" then enter a default response in the **FIELD OPTIONS** text box for a default response.

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7. Click **OK**. The following dialog box will flash up on the screen.
8. This is a preview of how your prompt boxes will appear to those people using your template.
9. Click the **CANCEL** button to clear the dialog.
10. Repeat the process until you have created dialogs to cover all the variable information you need to prompt for.
11. Save the template file.

    You won't see the underlying FILLIN field codes unless you switch on the field codes on the ADVANCED page SHOW DOCUMENT CONTENT section of the OPTIONS dialog. It is useful to see these as you are working on the template, but remember to switch them off before you save the file or anyone using the template might get confused!

Using A Template With Fillin Fields

The dialog boxes will appear whenever a new document based on the template is created.

To create a new document based on the template:

Mouse

1. Click the **FILE TAB** then **NEW**.
2. Choose **MY TEMPLATES** The **MY TEMPLATE** dialog will appear
3. The templates should be listed on the **MY TEMPLATES** page of the dialog in icon format. Select the type of document you want to create with the Fillin fields and ensure that the document option in the "create new" section is selected then click on **OK** or double click the icon.

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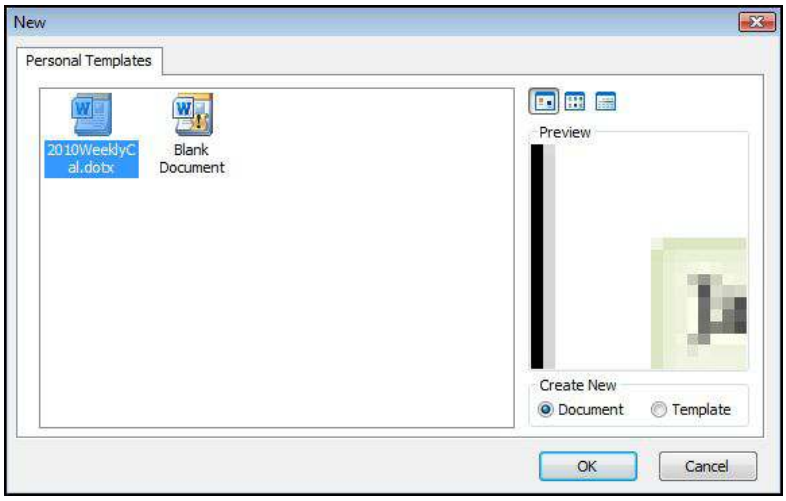

4. The new document will appear with any boilerplate text, headers and footers and dialogs that you set up in the template.
5. Enter information in the various Fillin field dialogs this will enter the information in the appropriate locations in the document when complete save and print it in the usual way.
   Whenever you click in a field code or result, the whole field is displayed with a grey shaded background. However you can use the Field shading Options dialog to specify that all fields, even if they are not selected, should be displayed with a grey background. This can help you to quickly identify text which has been generated by a field.

To alter field shading options:

Mouse

1. Click the **FILE TAB** and select **WORD OPTIONS.** Click on the **ADVANCED** tab and scroll on the right to **SHOW DOCUMENT CONTENT**. Click on the **SHOW FIELD CODES INSTEAD OF THEIR VALUES** check-box.
2. Use the **FIELD SHADING** drop down list to pick the type of shading you want:

- *Choose **NEVER** to display no shading*
- *Choose **ALWAYS** to display shading on all fields*
- ***WHEN SELECTED** is the default*

Form fields

Starting with a template, you can add content controls and instructional text in Microsoft Office Word 2010 to quickly and easily create a form that you can send to others to fill out using Office Word 2010 on their computer. In an advanced scenario, any content controls that you add to a form can also be linked to data.

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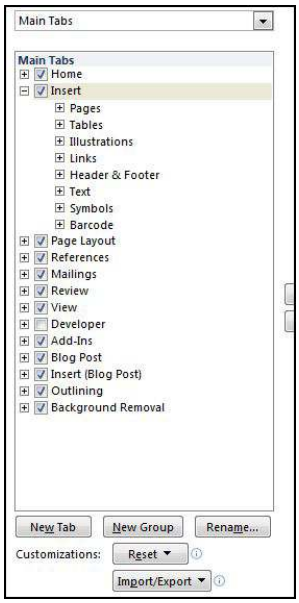

You can also create a form by starting with a sample template. Many are available on the Microsoft Office Online Web site.

You can print a form that was created by using content controls in Office Word 2010, but the boxes around the content controls will not be printed.

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Create A Form

Word is not immediately ready to start creating forms as the more advanced tools have been hidden. To rectify this we must make them available.

To Set up Word for creating forms

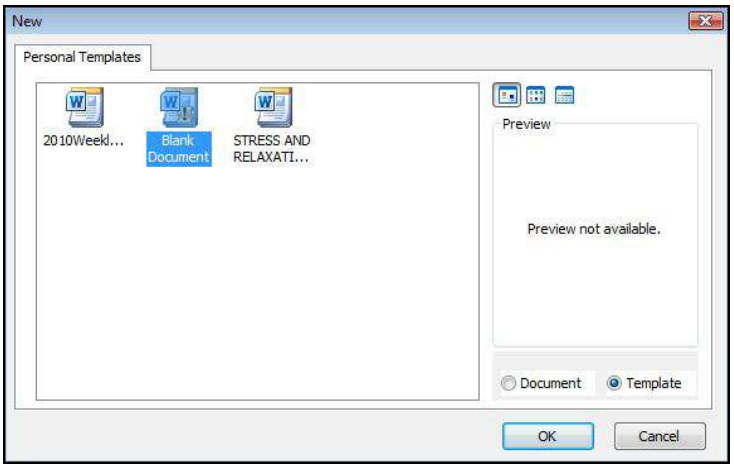
Mouse

1. Click the **FILE TAB** , and then click **OPTIONS**.
2. Click **CUSTOMISE RIBBON** on the left.
3. On the right Select **DEVELOPER TAB** check box, and then click **OK**.

To create a template or a document on which to base the form

Mouse

1. Click the **FILE TAB** , and then click **NEW**.
2. Under available **TEMPLATES**, click **MY TEMPLATES**.



3. Click **BLANK DOCUMENT**, and then select **TEMPLATE** or **DOCUMENT** on the bottom right.
4. Click **OK**
5. Click the **FILE TAB** , and then click **SAVE AS**.
6. In the **SAVE AS** dialog box, give the new template or document a file name, and then click **SAVE**.

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Controls

Content control	Definition	Example	Restrictions
Rich Text	Formatting can be saved by loading, saving, or closing the document.	Use for a short paragraph such as an abstract, a summary, or a legal disclaimer.	No restrictions.
Text	Limited to content that cannot contain any formatting, only plain text.	Use for a simple paragraph.	Limits the formatting to the formatting that is applied around the content control. You can change the formatting by making changes to the surrounding formatting.
Picture	Fills the content control with a single picture.	Use for a drawing, a shape, a chart, a table, a clip art object, or SmartArt.	Limits formatting changes to picture brightness and contrast. Also prohibits users from inserting any other Word objects or any text.
Combo Box	Contains a list that you can edit directly. Formatting can be saved by saving or closing the document.		Like plain text, limits text to a single paragraph that cannot contain any formatting.
Drop-Down List	Contains a list of restricted choices defined by the template author when the user activates the drop-down box.	Use this to provide a set of choices, such as a list of names or a set of formatted design elements (such as cover pages or header or footers).	Like plain text, limits text to a single paragraph that cannot contain any formatting.
Date Picker	Contains a calendar control. Limits text to a single paragraph.	Use this to help users enter a date.	Like plain text, limits text to a single paragraph that cannot contain any formatting.
Building Block Gallery	Shows a gallery of formatted design choices that you can add to the content control.	Use this to specify a set of cover pages, headers and footers, page designs, or other building blocks that you add to the Quick Parts gallery.	No restrictions.

To Add content controls to the form

Mouse and keyboard

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1. Design the form by sketching a layout first (on paper), or use an existing form as a guide.
2. In your form, you can add content controls, tables, and other graphics elements.
3. On the **DEVELOPER** ribbon, in the **CONTROLS** group, click **DESIGN MODE**, and then click where you want to insert a control.
4. On the **DEVELOPER** ribbon, in the **CONTROLS** group, click the **RICH TEXT** control or the **TEXT** control .

- *Inserts a basic text field where users can enter text*

5. On the **DEVELOPER** ribbon, in the **CONTROLS** group, click the **DROP-DOWN LIST** control.

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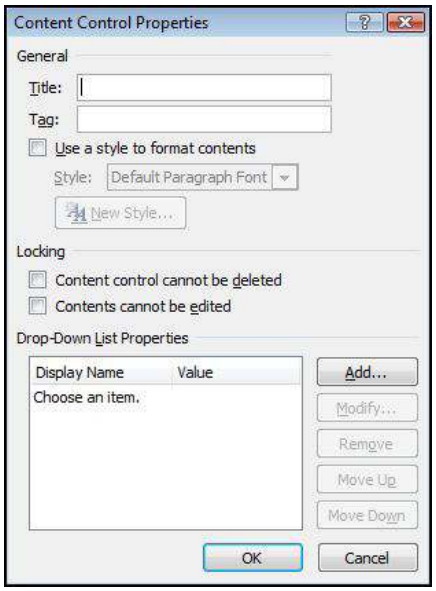
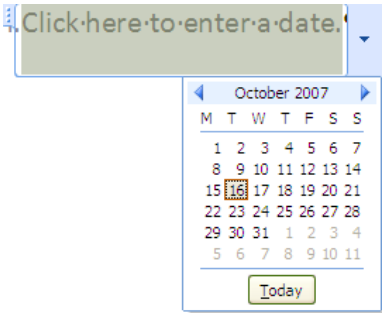


- *Inserts a drop-down list that restricts available choices to those you specify*

6. Select the content control, and then on the **DEVELOPER** ribbon, in the **CONTROLS** group, click **PROPERTIES**.
7. To create a list of choices, under **DROP-DOWN LIST PROPERTIES**, click **ADD**.
8. Type a choice in the **DISPLAY NAME** box, such as **YES**, **NO**, or **MAYBE**.
9. Repeat this step until all of the choices are in the drop-down list then click **OK**.

To set or change properties for content controls

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



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Mouse

1. Ensure you are in **DESIGN MODE**
2. Right-click the content control that you want to change.
3. Click **PROPERTIES**, and change the properties that you want.

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

Mouse

1. On the **DEVELOPER** ribbon, in the **CONTROLS** group, click **DESIGN MODE**.
2. Click the content control where you want to revise the placeholder instructional text.
3. Edit the placeholder text and format it any way you want.
4. 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.
5. On the **DEVELOPER** ribbon, in the **CONTROLS** group, click **DESIGN MODE** to turn off the design feature and save the instructional text.

- *Do not select the **CONTENTS CANNOT BE EDITED** check box if you want form users to replace the instructional text with their own text.*

Add Protection To The Form

You can protect individual content controls in a template to help prevent someone from deleting or editing a particular content control or group of controls, or you can help protect all of the template content with a password.

- *If you want, you can test the form prior to distributing it. Open the form, fill it out as the user would, and then save a copy in a location that you want.*

To Protect fields in a form

Mouse

1. Open the form that you want to protect.
2. Select the content control or the group of controls to which you want to restrict changes.
3. To group several controls, select the controls by pressing **SHIFT** and clicking each control that you want to group. On the **DEVELOPER** ribbon, in the **CONTROLS** group, click **GROUP**, and then click **GROUP**.
4. On the **DEVELOPER** ribbon, in the **CONTROLS** group, click **PROPERTIES**.
5. In the **CONTENT CONTROL PROPERTIES** dialog box, under **LOCKING**, do either of the following:
6. 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.

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7. 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.
   This option is not available for all controls.

To Protect all of the contents of a form

Mouse

1. Open the form that you want to help protect.
2. On the **DEVELOPER** ribbon, in the **PROTECT** group, click **RESTRICT EDITING**, a task pane opens.

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3. In the **RESTRICT FORMATTING AND EDITING** task pane, under **EDITING RESTRICTIONS**, select the **ALLOW ONLY THIS TYPE OF EDITING IN THE DOCUMENT** check box.
4. In the list of editing restrictions, select **FILLING IN FORMS**.
5. Under **START ENFORCEMENT**, click **YES, START ENFORCING PROTECTION**.
6. 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.

To Protect A Section Of The form

Rather than protect the whole of a form, you may want to allow users to freely type into certain areas.

Mouse

1. Position the insertion point where you wish protection to stop.
2. Select **BREAKS** from the **PAGE SETUP** group on the **PAGE LAYOUT** ribbon.
3. Click on the **CONTINUOUS** break.
4. **RESTRICT EDITING** from the **REVIEW** or **DEVELOPER** ribbon

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5. Click on the **FILLING IN FORMS** from the drop down box then click on **SECTIONS** a dialog opens.
6. Remove the protection from Section 2 and click on the **YES START PROTECTION**.
7. Type a password if you desire. Confirm the password and note that the top section is now protected. Now save the template.
   Open a new document based on this and note that while you can only access the fields in the protected section you are able to type below the section break.

   If you choose not to use a password, anyone can change your editing restrictions. Use strong passwords that combine uppercase and lowercase letters, numbers, and symbols. Weak passwords don't mix these elements. Strong password: Y6dh!et5. Weak password: House27. Passwords should be 8 or more characters in length. A pass phrase that uses 14 or more characters is better.

   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.

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