Word 2013 Templates & Forms

Templates

Templates versus Documents

Word documents (*.docx files) are based on document templates (*.dotx or *.dotm files). Default text, formatting, and graphics can be stored in templates, making it easy to quickly generate new documents based on standardized content and layouts. *.dotm files can also store macros. Each time a template is used to create a new document, a new .docx file is created.

Note: Creating a blank document creates a document based on the Normal template (Normal.dotm).

Templates and Macros

If a new *.docx document is created from a *.dotm template file, it can run macros from the template so long as the template file is accessible by the computer the new document is on.

To share macros, distribute the template or store it in a central location such as a workgroup template folder (See **Adding a Workgroup Template Folder** below)

Using a Template

To create a new document based on a template:
1. [Double Click] the template file.

Or, on the Start or FILE, NEW screen:
1. Select:
   - FEATURED: Pinned templates including samples installed with Word.
   - PERSONAL/CUSTOM/SHARED*: Templates created by you or your organization.
   - Or, to download from the regularly updated Office.com templates, select one of the SUGGESTED SEARCHES or type a keyword in the SEARCH FOR ONLINE TEMPLATES search bar (e.g., business plan), then [Click] 🔍.
2. Select a template then if needed [Click] CREATE.

* PERSONAL shows only after a template is saved to the Custom Office Templates folder. SHARED shows if a workgroup template folder has been set. CUSTOM shows if more than one (personal or workgroup) template folder is in use.

Creating a New Template

1. Create or open a document to be used as a template.
2. Add and change the elements you'd like for your template such as margins, headers & footers, styles, and text.
3. Choose FILE then SAVE AS.
4. [Click] BROWSE next to any location (template location is specified later).
5. Change SAVE AS TYPE to WORD TEMPLATE or WORD MACRO-ENABLED TEMPLATE.
   Word automatically switches to your CUSTOM OFFICE TEMPLATES folder. To save in another location, browse to that location.
6. Type the FILENAME for the template, then [Click] SAVE.

Editing a Template

[Double Clicking] a template file does not open the template, it creates a new document based on the template. To edit the template file:
1. [Right Click] the template file, then select OPEN.
Or
1. Choose FILE then OPEN.
2. Locate and select the template file. Personal templates can be found in CUSTOM OFFICE TEMPLATES in your My Documents folder.
3. [Click] OPEN.

Showing Macro and Form Controls

1. Choose FILE, OPTIONS then CUSTOMIZE RIBBON.
2. Under CUSTOMIZE THE RIBBON, check DEVELOPER.
The DEVELOPER tab on the Ribbon is now visible.

Adding a Workgroup Template Folder

Use a shared workgroup template folder to centralize access to commonly used document templates.

1. Choose FILE then OPTIONS.
2. Select ADVANCED, then in the GENERAL section [Click] FILE LOCATIONS.
3. Select WORKGROUP TEMPLATES, then [Click] MODIFY.
4. Select the shared folder, then [Click] OK.
5. [Click] OK, then OK.

Templates in the selected folder are added to the SHARED/CUSTOM area of the Start and FILE, NEW screens.

Changing Which Template is Attached

Attaching a different template to a document makes available macros, shortcut keys, styles, Quick Parts, and Quick Access Toolbar customizations stored in the newly attached template.

1. Choose DEVELOPER, then DOCUMENT TEMPLATE 📄. If the DEVELOPER tab is not visible, see **Showing Macro and Form Controls**.
2. [Click] ATTACH.
3. Locate and select the desired template. [Click] OPEN.
4. Check AUTOMATICALLY UPDATE DOCUMENT STYLES to use the styles from the newly attached template.
   Note: Changes to the styles in the attached template change the document unless this checkbox is cleared.
5. [Click] OK.

Changing Defaults in the Attached Template

To change the defaults for font, paragraph, and page settings in the current document's attached template (usually the Normal Template):

1. For font, choose HOME, then [Click] 🔲 in the FONT group.
   For paragraph, choose HOME, then [Click] 🔲 in the PARAGRAPH group.
   For page setup, choose PAGE LAYOUT, then [Click] 🔲 in the PAGE SETUP group.
2. Select font, paragraph, or page setup attributes.
3. [Click] the SET AS DEFAULT button.
4. For page setup, [Click] YES.
   For font and paragraph, select ALL DOCUMENTS BASED ON..., then [Click] OK.

Changing Elements in the Attached Template

- Quick Parts, keyboard shortcuts, Quick Access Toolbar customizations, and macros are saved and updated in the attached template (usually Normal.dotm) by default. To change, open the template and edit.
- To change default font, paragraph, and page settings, open a document based on the normal template (a new blank document will usually work), then follow the steps in **Changing Defaults in the Attached Template**.
- To change styles, follow these steps:
  1. Change the style in the document.
  2. Choose HOME, then [Right Click] the style in the STYLES gallery or pane then select MODIFY.
  3. Further modify the style if desired.
  4. Select NEW DOCUMENTS BASED ON THIS TEMPLATE. [Click] OK.

Using Global Templates

To have macros, shortcut keys, Quick Parts, and Quick Access Toolbar customizations available for all your Word documents, regardless of template, add a global template:

1. Choose DEVELOPER, then DOCUMENT TEMPLATE 📄.
2. [Click] ADD.
3. Locate and select the template.
4. [Click] OK. The template appears in the GLOBAL TEMPLATES AND ADD-INS list.
5. Repeat steps 2 - 4 to add other templates to the list.

Removing a Global Template

1. Choose DEVELOPER, then DOCUMENT TEMPLATE 📄.
2. Select the template to remove, then [Click] REMOVE. To only disable, but not remove the template, uncheck it. [Click] OK.

Organizing Macros and Styles in Templates and Documents

To move (between files), rename, or delete macros and styles:

1. Choose DEVELOPER, then MACROS 📄 or DOCUMENT TEMPLATE 📄.
2. [Click] ORGANIZER.
3. Select the STYLES or MACRO PROJECT ITEMS tab.
4. On one side, select the source template or document. To open another file, [Click] CLOSE FILE then [Click] OPEN FILE.
5. On the other side, select the destination file.
6. Select the style or the module that contains the macro to be copied. [Click] COPY.
7. If you then want to remove the original style or module in the source file, [Click] DELETE, then YES to confirm.
8. You can also use RENAME to change a style or module name (e.g., if the same name is already being used in the destination file).
9. [Click] CLOSE when finished.

Inserting Fields with Options

Fields play a powerful part in templates. They allow for the automation of such things as page numbering, calculations and dates.

1. Place your cursor where the field information is to go.
2. Choose INSERT, then QUICK PARTS 📄, then FIELD.
3. Select a category and a field name within that category.
4. Change FIELD PROPERTIES and FIELD OPTIONS as necessary. For more detailed options, [Click] FIELD CODES, then OPTIONS. [Click] OK.

Note: To directly edit field codes without the help of a dialog, place your cursor in a field and press <Shift-F9> to display the field codes. When you are done, press <Shift-F9> to toggle the field back.

Using Building Blocks

Creating a Custom Building Block (BB)

1. Select the item(s) to be your BB (e.g., text, graphics, table).
2. Choose INSERT, then QUICK PARTS 📄, then SAVE SELECTION TO QUICK PART GALLERY.
3. Fill in details. To specify in which gallery the BB should appear, change the GALLERY. (e.g., choose TABLE for the QUICK TABLES gallery).
4. To have the BB saved in your template file, change SAVE IN to your file. Note: Your template will only appear in the SAVE IN list if it has already been saved as a template. [Click] OK.

Including Building Blocks in a Template

BBs such as custom headers saved to the header gallery are usually stored in "Building Blocks.dotx". BBs stored in your Building Blocks.dotx are not accessible on other users' computers, including when the file is sent by email. To move a BB to your template file for use by others:

1. Open the template file. If creating a new template file, save the file before continuing.
2. Choose INSERT, then QUICK PARTS 📄, then BUILDING BLOCKS ORGANIZER.
3. Select the BB to move, then [Click] EDIT PROPERTIES.
4. Change SAVE IN to be your open template file.
   Note: Your template will only appear in the SAVE IN list if it has already been saved as a template.
5. [Click] OK then [Click] YES.
6. Repeat steps 3 to 5 to move additional BBs. [Click] CLOSE when done.

Copying Building Blocks between Templates

1. Insert the BB into a document as usual.
2. Select the inserted text and graphics.
3. Copy, then Paste into the destination template file.
4. Select the pasted text and graphics.
5. Choose INSERT, then QUICK PARTS, then SAVE SELECTION TO QUICK PART GALLERY.
6. Fill in details of the BB. Use GENERAL as the CATEGORY to access BBs from the QUICK PARTS menu.
7. Change SAVE IN to be the destination template file. [Click] OK.

Moving Building Blocks Between Templates

To move a BB among templates, first move it to the Building Blocks.dotx file, then to the destination template.

1. Open the template file with the BB.
2. Choose INSERT, then QUICK PARTS, then BUILDING BLOCKS ORGANIZER.
3. Select the BB to move, then [Click] EDIT PROPERTIES.
4. Change SAVE IN to be **Building Blocks.dotx**.
5. [Click] OK, then YES, then CLOSE.
6. Open the destination template file.
7. Choose INSERT, then QUICK PARTS, then BUILDING BLOCKS ORGANIZER.
8. Select the BB to move, then [Click] EDIT PROPERTIES.
9. Change SAVE IN to be the destination template.
10. [Click] OK, then YES, then CLOSE.

Creating Building Block Libraries

Template files containing custom BBs can be used as custom Building Blocks Libraries available to any Word document. To do this:

1. Create and save a template with custom BBs making sure to save the BBs in the template. See **Including Building Blocks in a Template**.)
2. Choose FILE then SAVE AS.
3. In the FILE NAME field type:
   %appdata%\Microsoft\Document Building Blocks
4. The folder changes to the Document Building Blocks folder. [Click] SAVE to make the file available to all languages, or choose a specific language subfolder (e.g. 1033 for English).
5. Close Word, then re-open. The custom BBs in your template file are now available for any document.

To distribute a custom Building Block library, email the template file and provide steps 2-4 as instructions.

Creating and Using Forms

Forms should be created as Word templates (.dotx or .dotm files). This will allow easy access to the form by users and will discourage direct editing of the form.

Inserting Content Controls

Use content controls to add sections that form users can fill out with specified content such as a text section or drop-down list.

1. Position the insertion bar at the point where you want users to type or select information.
2. Choose DEVELOPER, then from the CONTROLS group:
   - Aa Rich Text: Allows the form user to insert objects and format as if normally using Word.
   - Aa Plain Text: Allows the form user to enter up to one paragraph and choose a uniform formatting (e.g., all 12pt bold Arial blue).
   - Picture: A button allowing the form user to select a picture to insert.
   - Building Block Gallery: Allows the form user to pick from a set of building blocks.
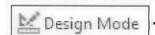   - Check Box: User can check or uncheck an item.
   - Combo Box: A pre-defined list of text items to choose from. User can also enter own text.
   - Drop-Down List: A pre-defined list of text items to choose from. User cannot enter own text.
   - Date Picker: A calendar from which a form user can pick a date.

Turning On/Off Design Mode

Use design mode to easily see all content controls in a document. To turn on/off choose DEVELOPER, then Design Mode .

Inserting a Repeating Section

To allow the form user to repeat a form section such as allowing one or many pictures to be inserted:

1. Select paragraphs or table rows.
2. Choose DEVELOPER, .
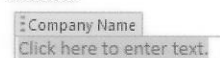3. Add content such as text, pictures, SmartArt, and content controls.

   To repeat a section, [Click] in the section, then [Click] .

Setting Content Control Properties

1. Select the form field to edit.
2. Choose DEVELOPER, then Properties .

Adding a Title

The title appears above the content control when selected:

Company Name
Click here to enter text.

Format Contents Using a Style

(not for Picture Content Controls)

You can specify what Word style the contents entered by the form user will have. To do so:

1. Check USE A STYLE TO FORMAT TEXT TYPED INTO THE EMPTY CONTROL.
2. Select the STYLE, or [Click] New Style... to create a style.

Self Destruct

Use self destruct to create a template that becomes a regular Word document after it has been filled out. To do so, check REMOVE CONTENT CONTROL WHEN CONTENTS ARE EDITED.

Allow Multiple Paragraphs For Plain Text

Choose ALLOW CARRIAGE RETURNS to allow the form user to enter multiple paragraphs.

Choose a Gallery For Building Block Gallery

With a building block gallery control the Quick Parts gallery is used by default. To choose another gallery such as Tables or Equations:

1. Choose a building block GALLERY such as Quick Parts (default) or Tables.
2. If desired, choose a specific CATEGORY.

Adding Items to Select From in Combo Box and Drop-Down Lists

1. [Click] ADD.
2. Type the text the form user will choose in DISPLAY NAME, then [Click] OK.
3. Repeat steps 1-2 for each drop-down item. [Click] OK.

Changing Check Box Symbol

1. [Click] CHANGE for the CHECKED SYMBOL.
2. Select the symbol, then [Click] OK.
3. Repeat for the UNCHECKED SYMBOL.

Changing Options For Date Picker

Choose date options such as the display format and CALENDAR TYPE.

The LOCALE option changes the suggested date formats, or type your own format (review the preset formats to determine which characters to use).

Changing Placeholder Text

Placeholder text such as "Click here to enter text" appears until a control is used. To change placeholder text:

1. If necessary, turn on design mode by choosing DEVELOPER, then Design Mode .
2. [Click] on the content control to be changed.
3. If necessary, [Click] to select the text.
4. Type over the text, and format as desired.

Protecting a Form from Changes

Once you have finished formatting the document and entering all of the form fields, you should protect the document. This will allow data to be entered into the form fields only and lock the rest of the document.

1. If necessary, turn off design mode.
2. Choose DEVELOPER, then RESTRICT EDITING .
3. In the RESTRICT FORMATTING AND EDITING task pane, turn on ALLOW ONLY THIS TYPE OF EDITING IN THE DOCUMENT.
4. Choose FILLING IN FORMS.
5. [Click] YES, START ENFORCING PROTECTION.
6. If desired, type a PASSWORD (twice) to restrict the ability to turn off protection. [Click] OK.
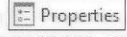
Unprotecting a Form

1. If necessary, show the RESTRICT FORMATING AND EDITING task pane (by choosing DEVELOPER, RESTRICT EDITING).
2. [Click] STOP PROTECTION. If a password was set, enter it and [Click] OK.

Protecting Only Parts of a Form

Individual content controls, as well as text and other parts of a document can be specifically protected from editing and/or deletions.

Preventing Editing of a Control's Content

1. Select the control to edit.
2. Choose DEVELOPER, then Properties .
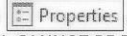3. Check CONTENTS CANNOT BE EDITED. [Click] OK.

Preventing Editing Parts of a Document

To prevent edits to non-control parts of a document:

1. Highlight some or all of the document.
2. Choose DEVELOPER, then Group , then GROUP.

The highlighted area is now non-editable (You do not have to specifically protect the document). Any content controls in the grouped area will still be editable unless specifically prevented.

Preventing Deletions

1. Select the control to edit. Or, for non-control parts of the document, first use grouping to prevent editing.
2. Choose DEVELOPER, then Properties .
3. Check CONTENT CONTROL CANNOT BE DELETED. [Click] OK.

Accessing the Form to Fill it Out

Save and use documents with form controls like any other document.

To have a form that opens blank and is re-useable, save the document as a Word template then use like any Word template.