

Forms and Form Fields in Word 2007

Convert an existing document to a template

1. Open Discipline Referral form.docx. This is a Word Document.
2. Select Office Button – Save As – Word Template
3. Choose a location.
4. I like c:\Documents and Settings*username*\Application Data\Microsoft\Templates. I know that is a long path, but you will see why I like this path in a few minutes.
5. Close Word.
6. Open again and create a new document.
7. Choose My Templates and you should see the template you just created.
8. Select the template and create a new document.
9. Fill out the template, save it, close Word and do another one.
10. Open another new document based on the template you just created.
11. That is the power of templates.

Supercharging your templates with form fields

12. Microsoft Office Button – Open
13. Navigate to the templates folder (c:\Documents and Settings*username*\Application Data\Microsoft\Templates)
14. Select the Discipline Referral template and click OK
15. You have now opened the template in such a way that you can modify the template.
16. If you don't see the Developer tab on the Ribbon (it is turned off by default) select Office Button – Word Options and in the Popular group find and check "Show Developer tab in the Ribbon"
17. Select the Developer tab
18. In the Controls Group click "Design Mode."
19. Click your mouse right after Date and in the Controls group find and click on Date Picker.
20. Click on Properties and enter "Select A Date" for the title and select a date format from the list.
21. Add a Rich Text control after student name. Click on Properties and name it Student Name.
22. Do the same for Teacher, Room Number, and Time of Incident. (Note: for time of incident, choose an appropriate time format.)
23. Save the template.
24. Choose Office Button – New – My Templates and find the new template. Be sure that you create a new document, not a new template.
25. Fill in the form.
26. You should still have the template open. Let's modify it some more.
27. Turn on design mode.
28. For location of incident, let's add a different kind of control, a combo box.
29. Click on properties and add some different locations

30. Let's go ahead and add some checkboxes to the next section also. You will find that control in the Legacy Tools command. Add one for each of the options in the box.
31. Turn off Design Mode and save the template.
32. Create a new doc based on the template and fill it out.
33. You will notice that the checkbox doesn't seem to work. That is because before it will work, you have to take an additional step. You have to protect the form.
34. Close this new doc without saving and return to the template.
35. Turn off Design Mode.
36. Select Protect Document – Restrict Formatting and Editing
37. In the Task Pane select "Allow only this type of editing in the document"
38. Then in the drop down select "Filling In forms"
39. Click Yes, Start Enforcing Protection
40. The password is optional but if you want to keep others from making changes in your form, you need one.
41. Click OK and save the template.
42. Create a new doc based on the template
43. Return to the template and turn off the protection
44. Turn on Design Mode
45. Add a rich text control in the detailed reason area. The reason that is in a table cell is so that as the text area expands, it won't push the text at the bottom of the page over to the next page.
46. Add a date picker with a time only format to the time sent to office line.
47. Turn off design mode and turn on protection again.
48. The next step is really cool. We are going to add some prompting fields to the template.
49. Be sure the template is open and you are in design mode. Protection must also be turned off.
50. Delete the student name, referring teacher, and room number controls.
51. Click after Student Name and select Insert – Quick Parts – Fields
52. Find the Fillin field
53. In the Prompt box type "enter Student's Name"
54. Click OK. Don't type anything in the next box. Just click OK
55. Do the same for Referring Teacher and Room Number with appropriate prompts.
56. Turn off design mode and enforce protection.
57. Save the template
58. Create new doc based on the template.