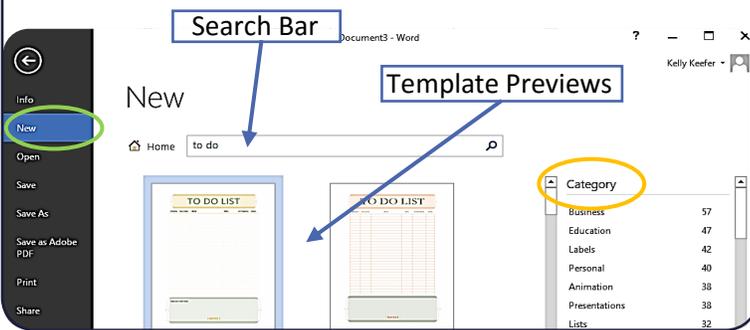




Microsoft Templates

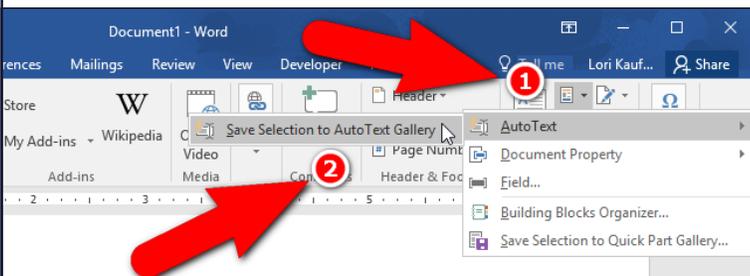
In the backstage view of Word, select New on the left hand pane. In the middle pane you will see a variety of template previews and a search bar where you can type in the style of template you are looking for. The right pane provides a variety of pre-defined categories that you can click on and view templates that reflect those respective themes. Remember that these templates are a great starting point and can be completely customized to your preferences.



Auto Text

Auto Text is a way to store parts of a Word document for re-use. An Auto Text entry can store anything a Word document can contain, such as formatted text, pictures and fields. Create a library of boilerplate paragraphs for business letters, or keep a handy selection of headers and footers. (Must be saved in the template).

Select the area in the document you want to save > Insert Tab > Quick Parts > Auto Text > Save Selection to Auto Text Gallery



Fill out the fields in the Create New Building Block box and click OK.

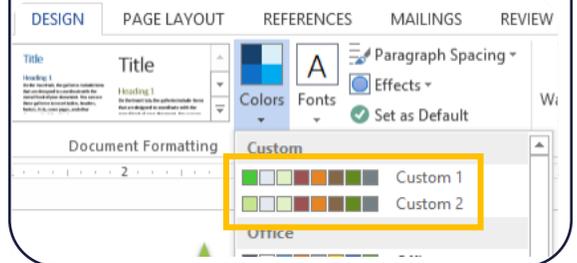
Quick Style and Themes

Quick Styles and Themes can be utilized through the Design tab.

Quick Styles provide you with a way to format your template. They consist of heading, body text, quote and title formatting that are specifically designed to create a cohesive look that appeals to the viewer.

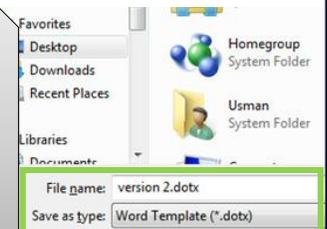


Themes are another way to format a template by providing color sets, fonts and effects. Use the dropdowns to scroll through the variety of potential options.



Save and Protect a Template

1. Choose Font
2. File → Save As
3. Locate Network Drive to Save on
4. Save as type: Word Template



Hint: After saving your template you may want to add security so someone doesn't make unwanted changes to the document you put together. When you open the original template file it can be set up to prompt you for a password. (This will only effect the original template-the template copies used by others will not require a password)

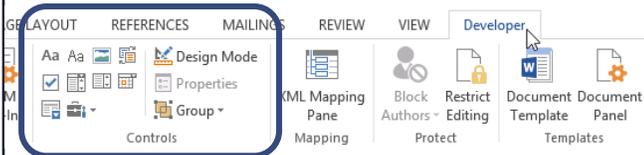
Click File > Info > Protect Document > Encrypt with Password > Type in a Password > Click OK > Save the Document



Developer Tab

The Developer Tab is utilized to create form fields within your template.

To add the Developer tab to your ribbon, go to Backstage View > Options > Customize Ribbon > and check the box next to Developer



Use the Controls group on the Developer tab to choose a field to insert into your form.

The content control field will appear in the document like the name example below.

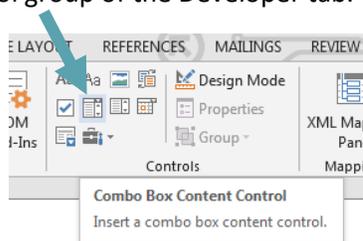
First Name:

Last Name:

You can add several fields and customize as needed.

Drop Down Selection

If you would like to provide a drop-down list for the user to choose pre-defined options from you will need to select the combo-box tool found in the Control group of the Developer tab.



In the box that appears, edit the content and add data that you want to appear in the dropdown then save.

Choose an item. ▼

Choose an item.

Monday

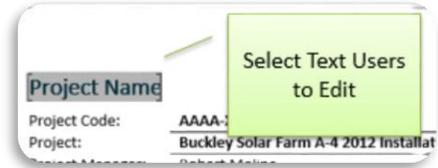
Tuesday

Wednesday

Editing Controls

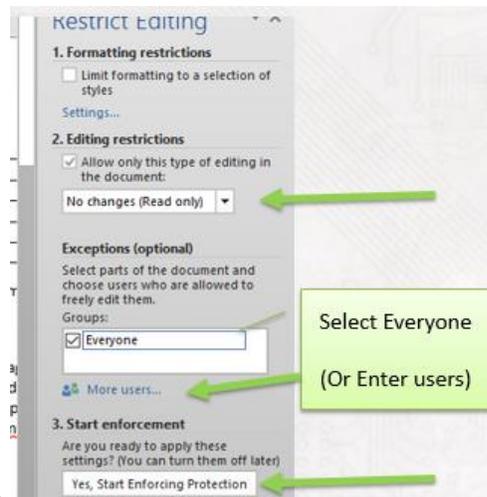
You can use editing controls to determine which users can or cannot make changes to each specific field in a document.

First, highlight the field that you would like to apply a restriction to.



Review Tab > Protect > Restrict Editing

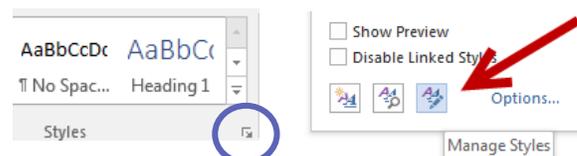
The Restrict Editing pane will appear.



Make the settings reflect whether you would like that area to be edited or not and by whom. Then click *Yes, Start Enforcing Protection*. After each area of the form is specified make sure to save.

Restrict Formatting

When creating a template, you may have set up specific themes and styles that you want to remain consistent. To avoid variation its important to apply formatting restrictions. Select the Dialog Box Launcher in the Styles group on the Home tab. Then choose the Manage Styles button.



In the box that appears under the Recommend tab you can select which styles you want to hide so only the styles you created can be used.

You can use this same process for themes under the Restrict tab rather than Recommend tab.