

Creating Forms and Using Templates

The forms toolbar in Word allows the user to create forms and lock them so the person completing the form can only enter information into predefined fields. It's sort of like completing an online form on the Internet. We'll explore how to set up the form, save the form as a template and complete the form.

This course also explores why the Word user should save certain documents as templates. There are some great templates that can be downloaded from Microsoft.com and hp.com. We'll take a look at both of those websites and learn how to utilize those templates.

Course Length

4 hours

Course Objectives

1. Know the tools of the forms toolbar
2. Learn how to create, save and complete the form
3. Understand how to create, save and open a template
4. Explore websites that offer free Word templates

Course Lessons

- Understand the form toolbar
- Understand the role of templates
- Insert a text form field
- Specify calculations in form fields
- Insert a check box field
- Insert a drop down field
- Add help to a form field
- Customize the form
- Save the form as a template
- Open and complete the form
- Explore online forms at Microsoft.com and hp.com

Course Materials Supplied

- **Course Booklet**
Every participant receives a booklet that contains course notes and a listing of Internet resources.
- **Free CD**
Contains Word resources such as Templates and Word documents containing links to Free Tutorials and Tips & Tricks Websites.

Creating a Form and Saving as a Template



Mousercize: Using the Form Toolbar to Create a Form

1. Start Word, click **File** in the menu bar and then click **New**.
2. Click the **General Templates** hyperlink in the Task Pane in the New from template section. Make sure the **General** tab is selected. Click on **Blank Document** and in the right corner of the dialog box click **Template** in the Create New section.
3. Open the forms toolbar by going to **View** in the menu bar and then point to **Toolbars**. Next select **Forms**. Hint: you can also right click on any toolbar and select **Forms**.
4. Make sure the **Show/Hide** button is selected so that you can see nonprinting characters.

