

Lesson 8

Lesson 8

Saving Time by Using Templates and Forms

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Learn how to:

- ◆ Design a memo based on a template
- ◆ Create a custom template
- ◆ Gather information using electronic forms
- ◆ Make an electronic form
- ◆ Create a table in a form
- ◆ Use an electronic form

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Create a Memo Using Template

- ◆ Template: a special kind of Word document
 - ✓ Ends with .dot, as compared .doc for regular word documents
- ◆ Assists you in creating specific kinds of documents
 - ✓ memos, press releases, letters, etc.
- ◆ To access templates use the File | New option

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Designing a Custom Template

- ◆ Several templates already provided by MS Word
- ◆ You can also create custom templates
- ◆ Creating template:
 - ✓ Create the custom word document with all the formatting requirements
 - ✓ Choose File | Save As and then select “document template” in the save as type
 - ✓ Template is stored in the Templates subfolder

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Gathering Information Using Electronic Forms

- ◆ To save time and ensure accuracy in filling forms
- ◆ Can be e-mailed or directly faxed to recipients (such as survey forms)
- ◆ Minimizes many of the disadvantages of the paper forms
 - ✓ such as deciphering someone's handwriting
 - ✓ will they replace paper forms

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Making an Electronic Form

- ◆ You will require the Forms toolbar
 - ✓ gives different field options like text boxes, check boxes, drop down fields, etc.
- ◆ A Field is an area where the user can enter a response to a prompt or question on the form

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Creating a Table

- ◆ Tables are very useful in formatting and arranging text and fields in a form
- ◆ Table is a grid of rows and columns containing boxes (called cells)
- ◆ use the Insert Table button on Forms toolbar
 - ✓ Can also use, Table | Insert Table command

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Insert Fields and Controls

- ◆ Need to display a Control for each Field
- ◆ Control is a type of field used to enter responses in a field
- ◆ Text fields is equivalent to a blank line
 - ✓ can be a fixed or unlimited length
- ◆ List fields provide a list of valid options from which to choose
- ◆ Check boxes allow checking (yes) or unchecking (no) the box

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Using an Electronic Form

- ◆ Once the form is designed protect it so that people do not inadvertently change the form
 - ✓ Click Protect Form button on Forms tool bar
- ◆ To use a Forms (can be completed online):
 - ✓ Use File | New, and choose appropriate form template to open a document based on the form
 - ✓ Fill the form using tab key to move between fields
 - ✓ Then print, e-mail or even fax directly

