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Microsoft Word 2013 Templates & Forms Quick Reference Guide (Cheat Sheet Of Instructions, Tips & Shortcuts - Laminated Card)

Word 2013 Templates & Forms

Templates

Templates versus Documents

Word documents (.docx) are created from a template (.dotx). A template is a document that contains the formatting and content that you want to use in your documents. You can create a template from an existing document or from scratch. To create a new template, you must first create a new document in the application. Then, you can save the document as a template. The new template will be stored in the local template folder.

Templates and Macros

The new Word documents are created from a template. A template is a document that contains the formatting and content that you want to use in your documents. To create a new template, you must first create a new document in the application. Then, you can save the document as a template. The new template will be stored in the local template folder.

Using a Template

To create a new document from a template:

1. Click the **File** tab on the ribbon.
2. Click **Open** in the **Recent** group.
3. Click **Open Recent** in the **Open Recent** group.
4. Click **Open Recent** in the **Open Recent** group.

Creating a New Template

To create a new template:

1. Create or open a document in the application.
2. Make any changes to the document that you want to save as a template.
3. Click **File** on the ribbon.
4. Click **Save As** in the **Save** group.
5. Click **Save As** in the **Save** group.
6. Type the name of the template in the **Name** box.

Editing a Template

To edit a template:

1. Click **File** on the ribbon.
2. Click **Open** in the **Recent** group.
3. Click **Open Recent** in the **Open Recent** group.
4. Click **Open Recent** in the **Open Recent** group.

Showing Macro and Form Controls

To show macro and form controls:

1. Click **File** on the ribbon.
2. Click **Options** in the **Word Options** group.
3. Click **Advanced** in the **Word Options** group.
4. Check **Show Developer Tools** in the **Show Developer Tools** group.

Adding a Workgroup Template Folder

To add a workgroup template folder:

1. Click **File** on the ribbon.
2. Click **Options** in the **Word Options** group.
3. Click **Advanced** in the **Word Options** group.
4. Click **Workgroup Template Folders** in the **Workgroup Template Folders** group.
5. Click **Add** in the **Workgroup Template Folders** group.

Changing Which Template is Attached

To change which template is attached:

1. Click **File** on the ribbon.
2. Click **Options** in the **Word Options** group.
3. Click **Advanced** in the **Word Options** group.
4. Click **Workgroup Template Folders** in the **Workgroup Template Folders** group.
5. Click **Change** in the **Workgroup Template Folders** group.

Changing Defaults in the Attached Template

To change defaults in the attached template:

1. Click **File** on the ribbon.
2. Click **Options** in the **Word Options** group.
3. Click **Advanced** in the **Word Options** group.
4. Click **Workgroup Template Folders** in the **Workgroup Template Folders** group.
5. Click **Change** in the **Workgroup Template Folders** group.

Changing Elements in the Attached Template

To change elements in the attached template:

1. Click **File** on the ribbon.
2. Click **Options** in the **Word Options** group.
3. Click **Advanced** in the **Word Options** group.
4. Click **Workgroup Template Folders** in the **Workgroup Template Folders** group.
5. Click **Change** in the **Workgroup Template Folders** group.

Using Global Templates

To use global templates:

1. Click **File** on the ribbon.
2. Click **Options** in the **Word Options** group.
3. Click **Advanced** in the **Word Options** group.
4. Click **Workgroup Template Folders** in the **Workgroup Template Folders** group.
5. Click **Change** in the **Workgroup Template Folders** group.

Organizing Macros and Styles in Templates and Documents

To organize macros and styles in templates and documents:

1. Click **File** on the ribbon.
2. Click **Options** in the **Word Options** group.
3. Click **Advanced** in the **Word Options** group.
4. Click **Workgroup Template Folders** in the **Workgroup Template Folders** group.
5. Click **Change** in the **Workgroup Template Folders** group.

Recovering a Global Template

To recover a global template:

1. Click **File** on the ribbon.
2. Click **Options** in the **Word Options** group.
3. Click **Advanced** in the **Word Options** group.
4. Click **Workgroup Template Folders** in the **Workgroup Template Folders** group.
5. Click **Change** in the **Workgroup Template Folders** group.

Using Building Blocks with Options

To use building blocks with options:

1. Click **File** on the ribbon.
2. Click **Options** in the **Word Options** group.
3. Click **Advanced** in the **Word Options** group.
4. Click **Workgroup Template Folders** in the **Workgroup Template Folders** group.
5. Click **Change** in the **Workgroup Template Folders** group.



Synopsis

Laminated quick reference guide showing step-by-step instructions and shortcuts for how to use Templates and Forms features of Microsoft Office Word 2013. This guide is suitable as a training handout, or simply an easy to use reference guide, for any type of user. The following topics are covered: Templates: Templates vs Documents Templates and Macros Using a Template; Creating a New Template Editing a Template Showing Macro and Form Controls Adding a Workgroup Template Folder Changing Which Template is Attached Changing Defaults in the Attached Template Changing Elements in the Attached Template Using Global Templates Organizing Macros and Styles in Templates and Documents Inserting Fields with Options Using Building Blocks: Creating a Custom Building Block; Including Building Blocks in a Template; Copying and Moving Building Blocks Between Templates; Creating Building Block Libraries Creating and Using Forms: Inserting Content Controls Turning On/Off Design Mode Inserting a Repeating Section Setting Content Control Properties: Adding a Title, Format Contents Using a Style, Self Destruct, Allow Multiple Paragraphs for Plain Text, Choose a Gallery for Building Block Gallery, Adding Items to Select From in Combo Box and Drop-Down Lists, Changing a Check Box Symbol, Changing Options for Date Picker Changing Placeholder Text Protecting a Form from Changes Unprotecting a Form Protecting Only Parts of a Form: Preventing Editing of a Control's Content, Preventing Editing Parts of a Document, Preventing Deletions Accessing the Form to Fill it Out This guide is one of several titles available for Word 2013: Word 2013 Introduction (ISBN 978-1936220816); Word 2013 Intermediate (ISBN 978-1936220823); Word 2013 Templates & Forms; and Word 2013 Advanced (ISBN 978-1936220830).

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Customer Reviews

I purchased a new computer and had my programs transferred to it. I had formerly been using Word 2003. It worked fine until I upgraded my computer and then some of the functions did not produce the results I was looking for. I bought Word 2013 and at once found myself in a very different environment. I realized I would have to "go back to school here at my desk" if I expected to use my new program. I have found this quick reference guide to be a lifesaver.

Very helpful in figuring out Microsoft Word 2013, especially since I don't have one of those genius young people to help, i.e. my grandchildren or your grandchildren.

Templates make all the difference when using word for more than just shopping lists - if you try them, I'm sure you will be pleasantly surprised

This template was very helpful to me. I am not very high tech savvy and this helped me tremendously

Hard to find cheat sheets like this. Well worth the price to have on hand. Get the whole series for a product. Really nice placemat too. Strong lamination. Available for all versions of word.

Contains all of the information that you will ever need. Cliff notes of MS Office 2013.

Just what a "newby" to the new Office suite needs! Very quick delivery too!!

I am visual so having something to refer to when you get stuck work great for me.

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